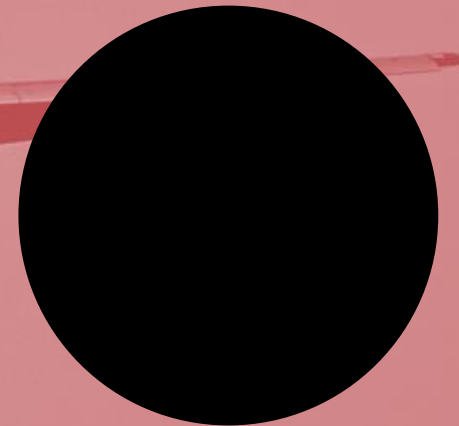
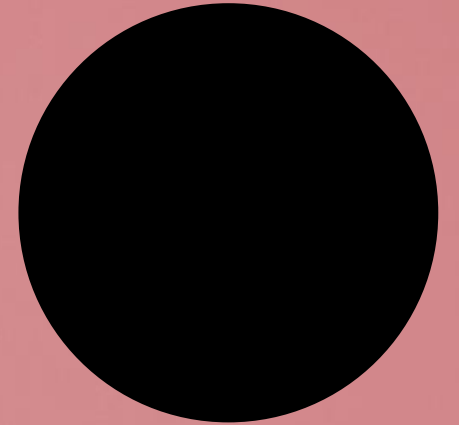

Civil Aviation Authority

UK Aviation Consumer Survey
Wave 9 (Winter 2020)



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Background and method

The Civil Aviation Authority (CAA) has re-commissioned Savanta ComRes, an independent research organisation, to conduct the ninth 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 is 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



Sample

A total of 3,504 interviews were conducted with a demographically representative sample of UK adults (18+).



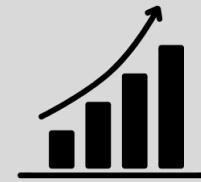
Method

Interviews were conducted online and over the telephone.



Fieldwork dates

13th Nov – 8th Dec 2020



Interpretation

With a sample size of 3,504 the margin of error on results at a 95 per cent confidence level is ± 1.66 . Findings marked with an asterisk (*) indicate a low base size. These results should be treated with caution.

COVID-19 context

Fieldwork for this survey took place 13th Nov – 8th Dec 2020, during the COVID-19 pandemic, under the following specific conditions:

- No vaccine rollout
- No COVID-19 variants
- Lockdown restrictions (UK second lockdown) until December 2nd 2020

It should be noted that this context will have influenced respondents' answers, whether they have flown recently or not.



This symbol / colouring highlights results from those who have **flown since the COVID-19 pandemic / lockdown began in the UK.**



This symbol / colouring highlights results from those who have **flown in the 12 months before answering the survey, but before the COVID-19 pandemic / lockdown began in the UK** (most recent flight c. November 2019 – February 2020).



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 is applied to the overall sample to address any minor discrepancies in the achievement of the demographic quotas.

Category	Sub-category	Weighted proportion	Unweighted proportion	Category	Sub-category	Weighted proportion	Unweighted proportion
Gender	Male	49%	49%	Region	North East	5%	5%
	Female	51%	51%		Yorkshire & Humber	8%	8%
Age	18-34	29%	29%		North West	11%	11%
	35-54	36%	36%		East Midlands	7%	7%
	55+	35%	36%		West Midlands	9%	9%
Working Status	Full time	41%	41%		London	13%	13%
	Part time	17%	17%		South East	14%	14%
	Not working	10%	10%		East England	9%	9%
	Retired	20%	20%		South West	8%	8%
	Homemaker	8%	7%		Wales	5%	5%
	Student	4%	5%	Scotland	8%	8%	
				Northern Ireland	3%	3%	

Demographic (Weighted) Sample Profile

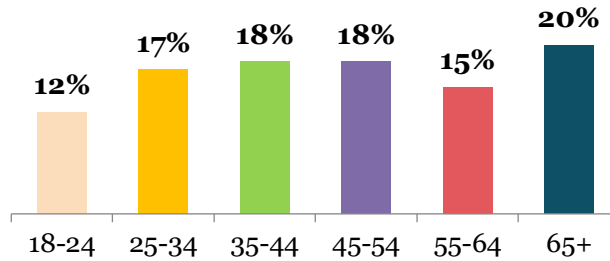
Gender



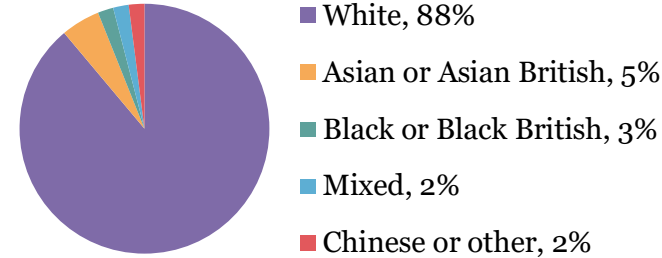
Male
49%

Female
51%

Age



Ethnicity



Internet Access

99 per cent of those interviewed by phone* have internet access



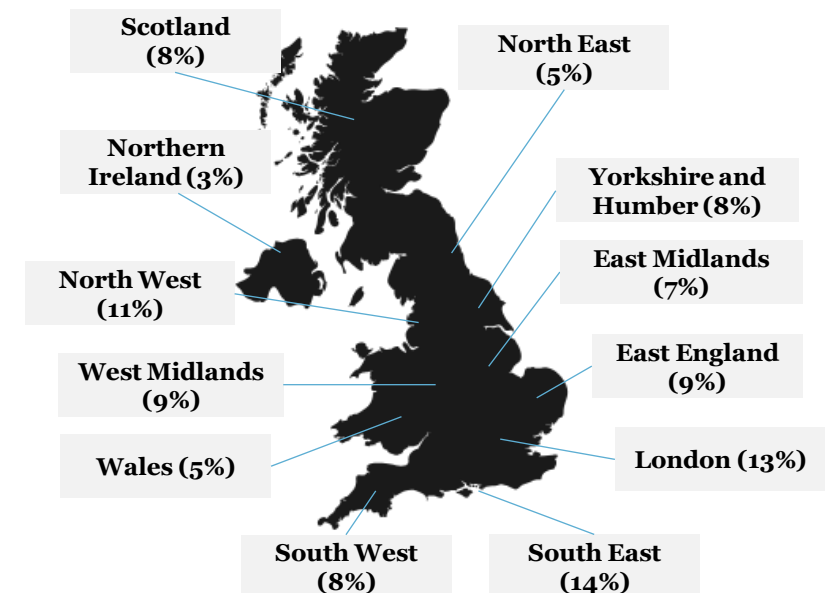
Working Status

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	10%
Retired	20%
Homemaker	8%
Student / full time education	4%

Household Income

Up to £14,999	16%
£15,000 - £24,999	19%
£25,000 - £39,000	26%
£40,000 - £74,999	23%
£75,000 or more	8%

Regions



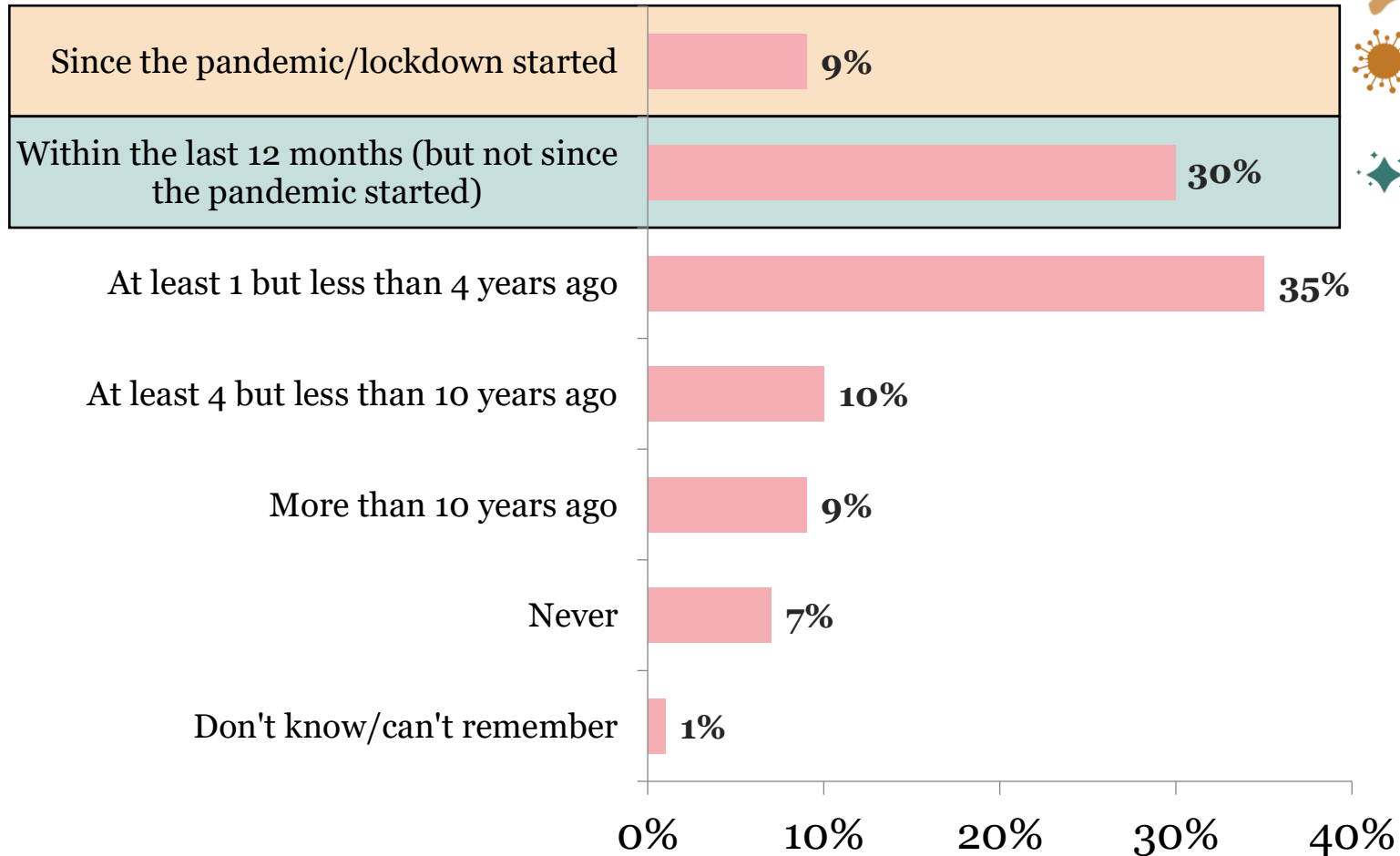
Impact of COVID-19



Covid-19 has dramatically affected flying behaviour. Just 9% of UK adults have flown since the pandemic began

Time since flight from a UK airport

Total sample



Flown since the pandemic started
Demographic analysis

- 19% - N. Ireland
- 16% - London
- 15% - Students
- 14% - Household income over £50,000

NB: Demographic analysis highlights most significant demographic differences

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=3504); 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=1360)

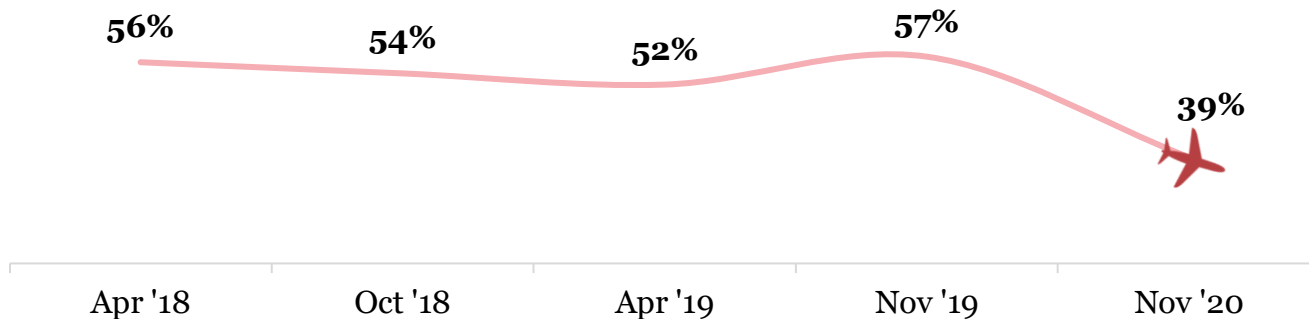
The proportion of respondents who have flown in the last 12 months has dropped sharply


In a year where the COVID-19 pandemic has forced many to abandon their air travel plans, it is not unexpected to see this have an impact on the proportion of passengers in our sample. The proportion of respondents who have flown in the last 12 months compared to Wave 8 has dropped by 32% from 57% to 39%.

Just 9% of respondents have flown since the pandemic began.

Showing % that have flown in the last 12 months

▼ 18 percentage point drop

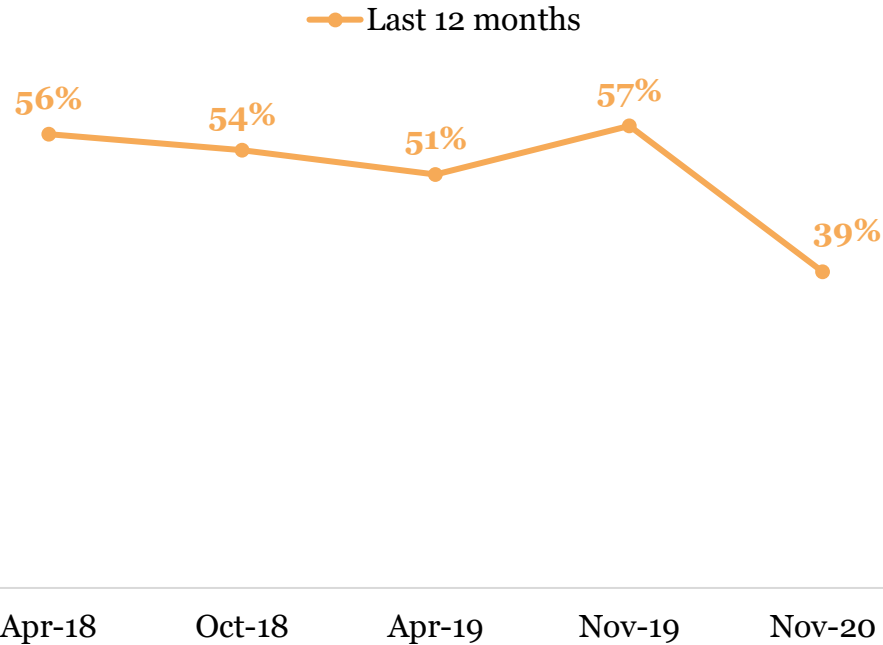


Nov '19: 1994 

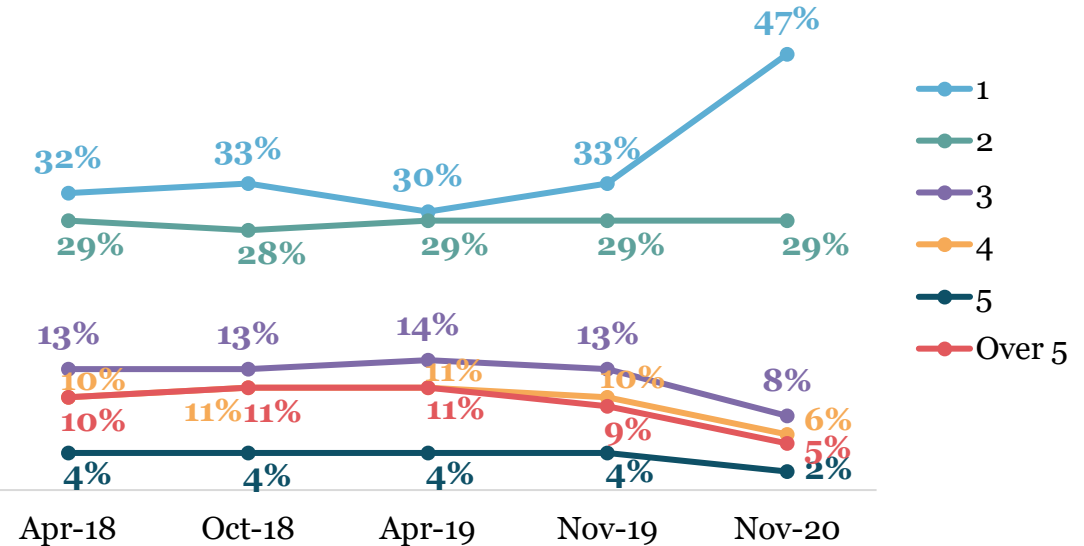
Nov '20: 1360  ▼ 32% compared to Nov '19

The proportion of people taking just one flight has risen since November 2019 as the frequency of flying has dropped

Frequency of flying
Tracked since August 2018
Total sample



Number of flights in last 12 months
Tracked since Apr 2018
All those who have flown in the last 12 months



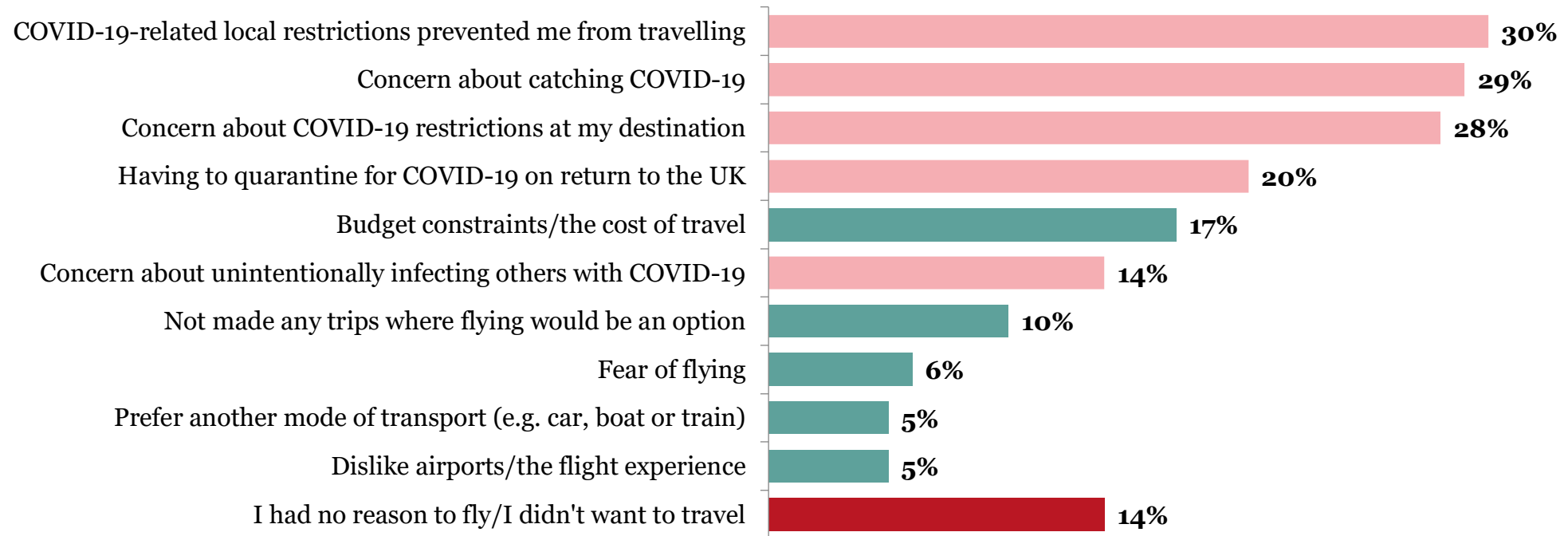
The proportion of people who have taken just one flight in the last 12 months has risen significantly by 14 percentage points since November 2019. **Flying since the pandemic started appears to be the domain of a small number of frequent fliers.** Half of those who last flew in the last 12 months but before the pandemic have taken just one flight (52%), whilst among those who have flown since the pandemic began, 63% have taken two or more flights.

COVID-19 related restrictions are the largest barrier to flying in the past 12 months

Barriers to flying in the past 12 months

All those who have not flown in the last 12 months

Showing all responses of 5% and over

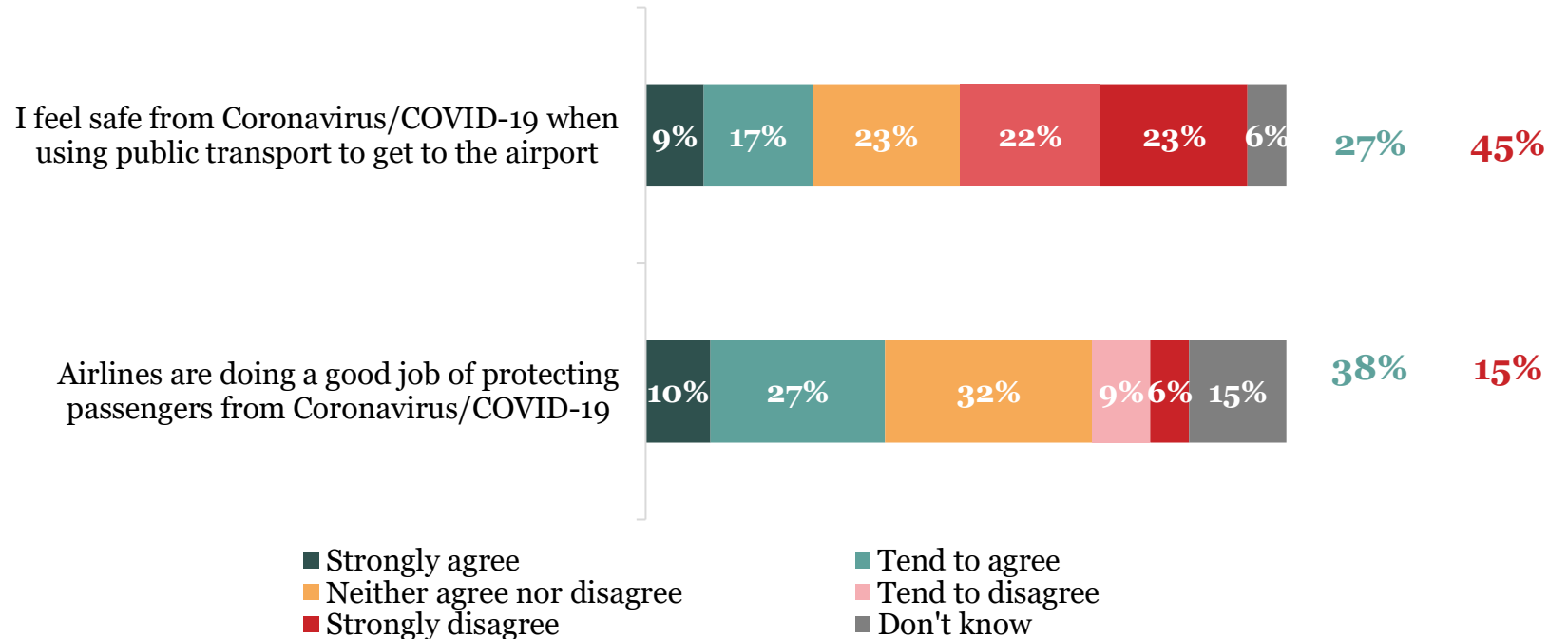


In recent waves, budget constraints and/or the cost of travel were the most common barriers to flying. In this wave, COVID-19 related local restrictions is the largest barrier to flying in the last 12 months in wave 9 (30%), with a similar proportion reporting concerns about catching COVID-19 (29%) and COVID-19 restrictions at their destination (28%). This wave, COVID-19 makes up the top 4 reasons given for not flying in the last 12 months.

Respondents are twice as likely to agree than disagree that airlines are doing a good job protecting passengers, but just a quarter feel safe when using public transport to get to the airport

Agreement with statements on COVID-19

Showing % saying the following

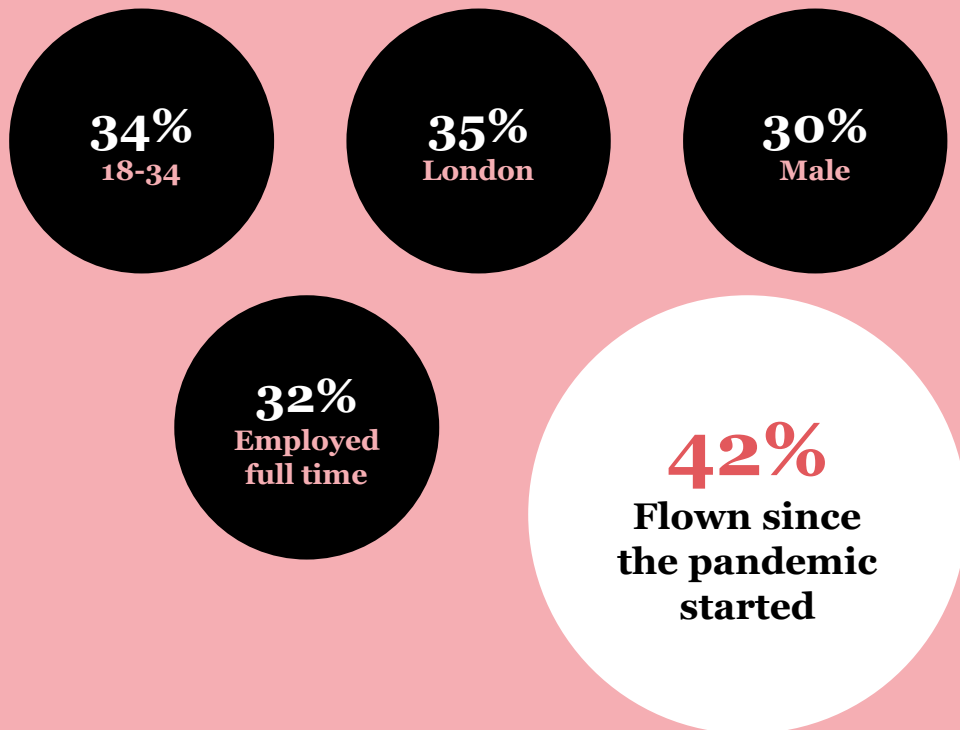


Just a quarter (27%) of respondents say they feel safe from COVID-19 when using public transport to get to the airport, while nearly half (45%) disagree. This disagreement is highest in respondents aged 55 and over and the retired, where nearly three in five say this (56% and 59% respectively).

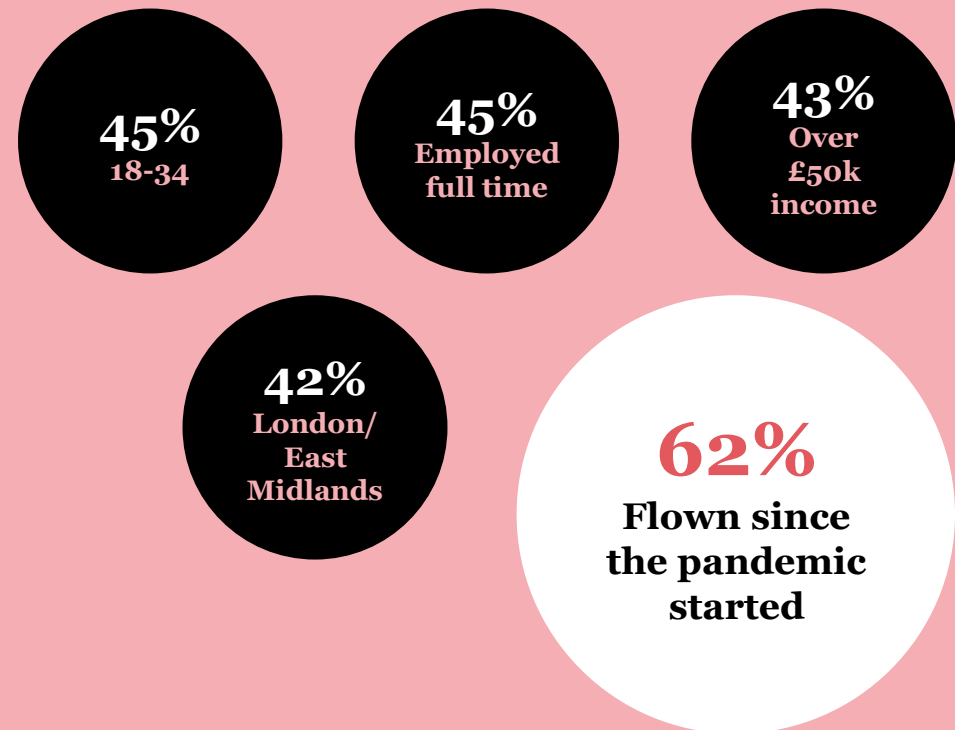
Nonetheless, respondents are more likely to agree that airlines are doing a good job of protecting passengers from COVID-19 than disagree, with nearly half (45%) of 18-34 respondents agreeing. Passengers who have flown since the pandemic started are significantly more likely to say the airlines are doing a good job (62%) than those who have flown in the months (47%) or years (35%) before the pandemic.

Three in five passengers who have flown since the pandemic started agree that airlines are doing a good job of protecting passengers from COVID-19

I feel safe from Coronavirus/COVID-19 when using public transport to get to the airport
Net: Agree – showing groups above average (27%)



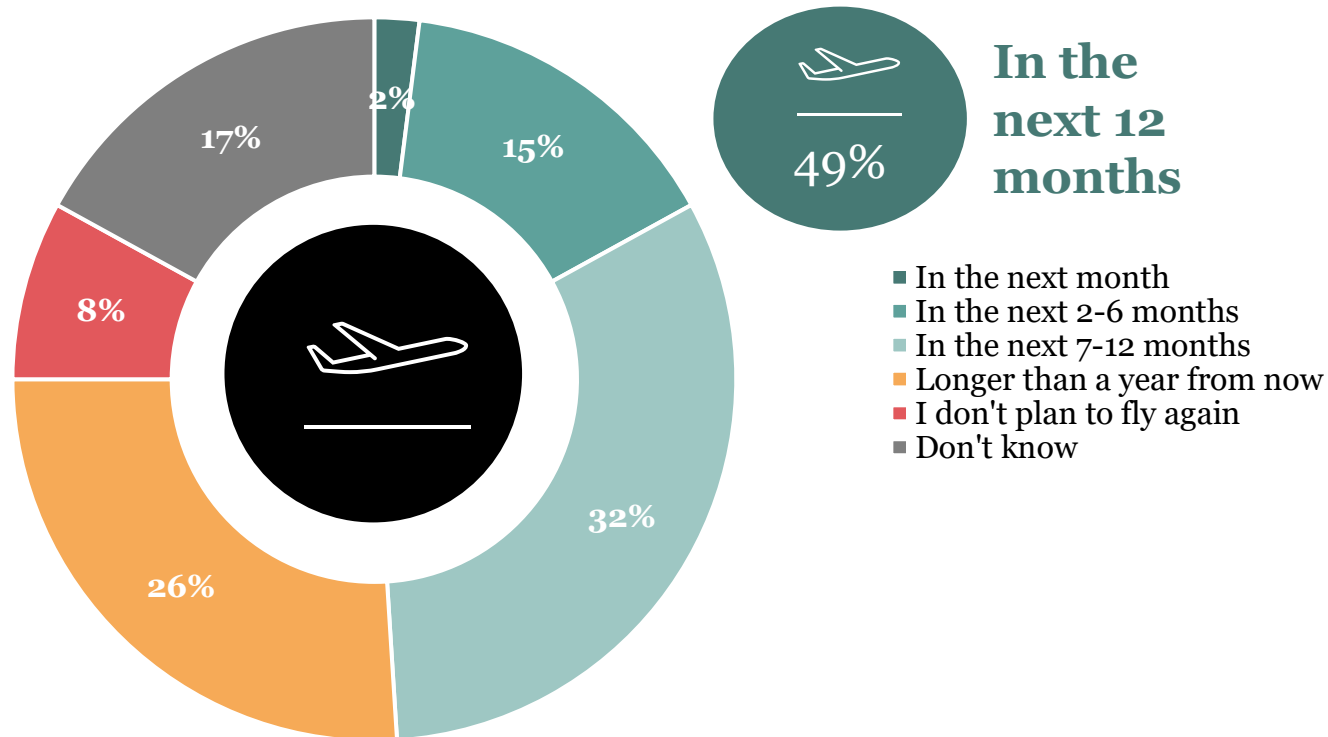
Airlines are doing a good job of protecting passengers from Coronavirus/COVID-19
Net: Agree – showing groups above average (38%)



Half of respondents expect that they will next travel by air in the next 12 months.

When do you next expect to travel by air

Showing % saying the following



A third (32%) of respondents expect to next fly in the next 7-12 months, while a quarter (26%) say they expect that it will be longer than a year from now before they travel by air.

Of those who have flown since the pandemic started, over four in five (84%) expect to fly again in the next 12 months.

One in ten (8%) say they currently do not plan to fly again, with those in the 55+ age bracket being most likely (11%) to expect not to fly again. Of those who do not plan to fly again, two in five (41%) have never flown before in the first place.

There is a divide between respondents by employment status over likelihood to fly again in the future

*“I don’t plan to fly again”
(8% overall)*

11%
55+

13%
Retired

12%
South
West /
Wales

*“In the next month/ 2-6 months/ 7-12 months”
(49% overall)*

66%
Over
£50k
income

61%
London

61%
Employed
full time

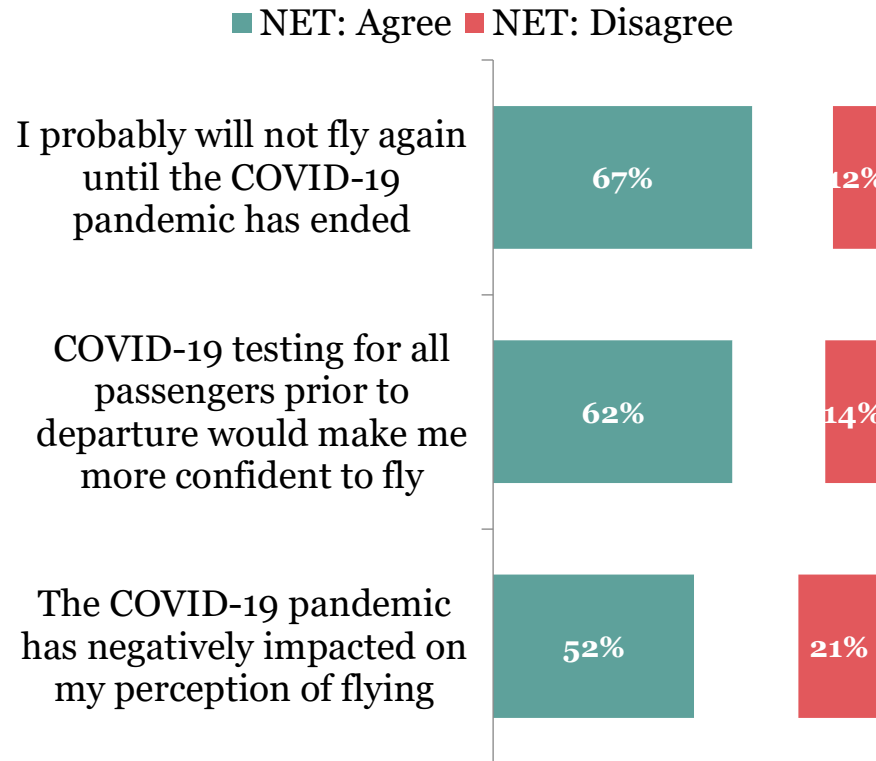
84%
Flown
since the
pandemic
began

Older respondents in the tracker tended to be more wary of flying again than younger respondents. However, it is important to note that the fieldwork for this wave of the aviation consumer tracker was conducted before the UK vaccine rollout. As such, hesitancy to fly from older respondents may change as they are vaccinated.

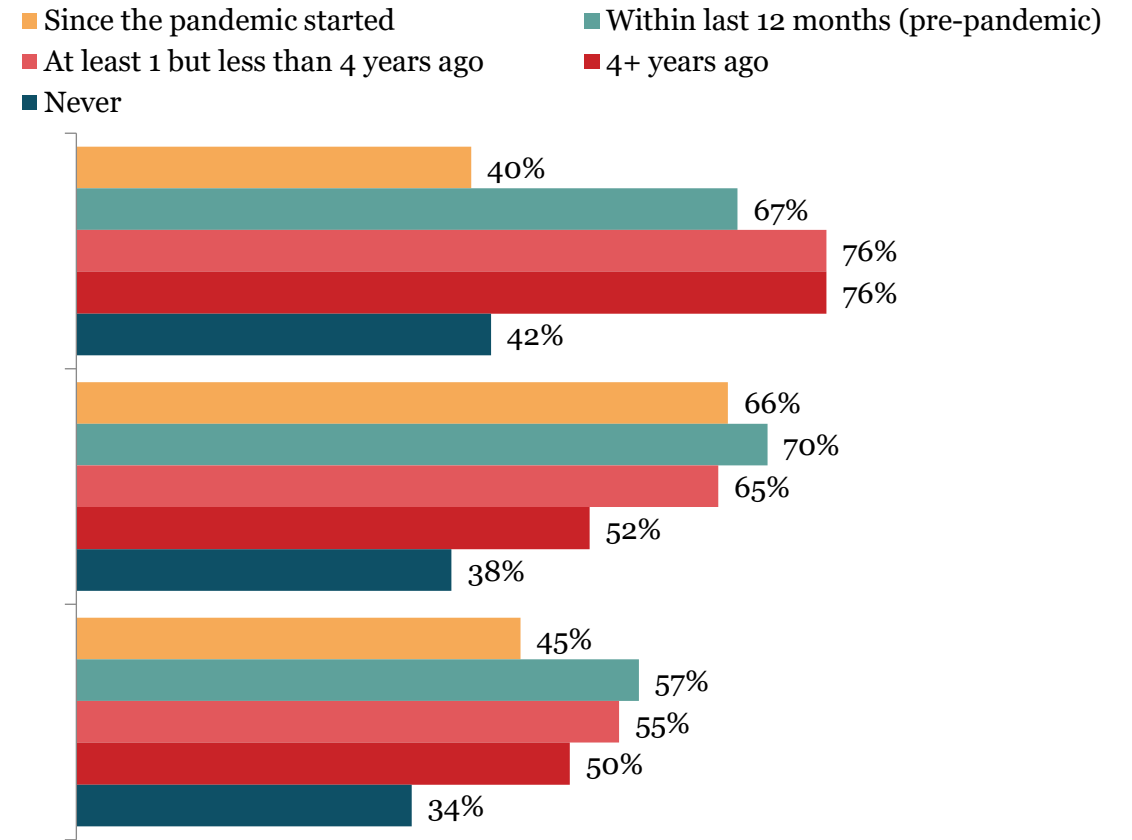
Those who say they expect to fly again in the next 12 months are more likely to have a household income over £50,000, be working full time or living in London. These travel plans may be influenced by potential for business travel or the need/want to escape from cities after lockdown. This is reflected by how over four in five (84%) respondents who have flown since the pandemic began say they are likely to fly again in the next year.

Two thirds say they probably will not fly again until the COVID-19 pandemic has ended, but this drops to 40% among those who have flown since the pandemic began

All respondents



All respondents by time of last flight – Percentage who **agree**



Headline measures



Among all UK adults, there is generally broad satisfaction with travelling by air across safety, receiving a good service and comparing providers

Question asked to all respondents, including non-recent fliers.

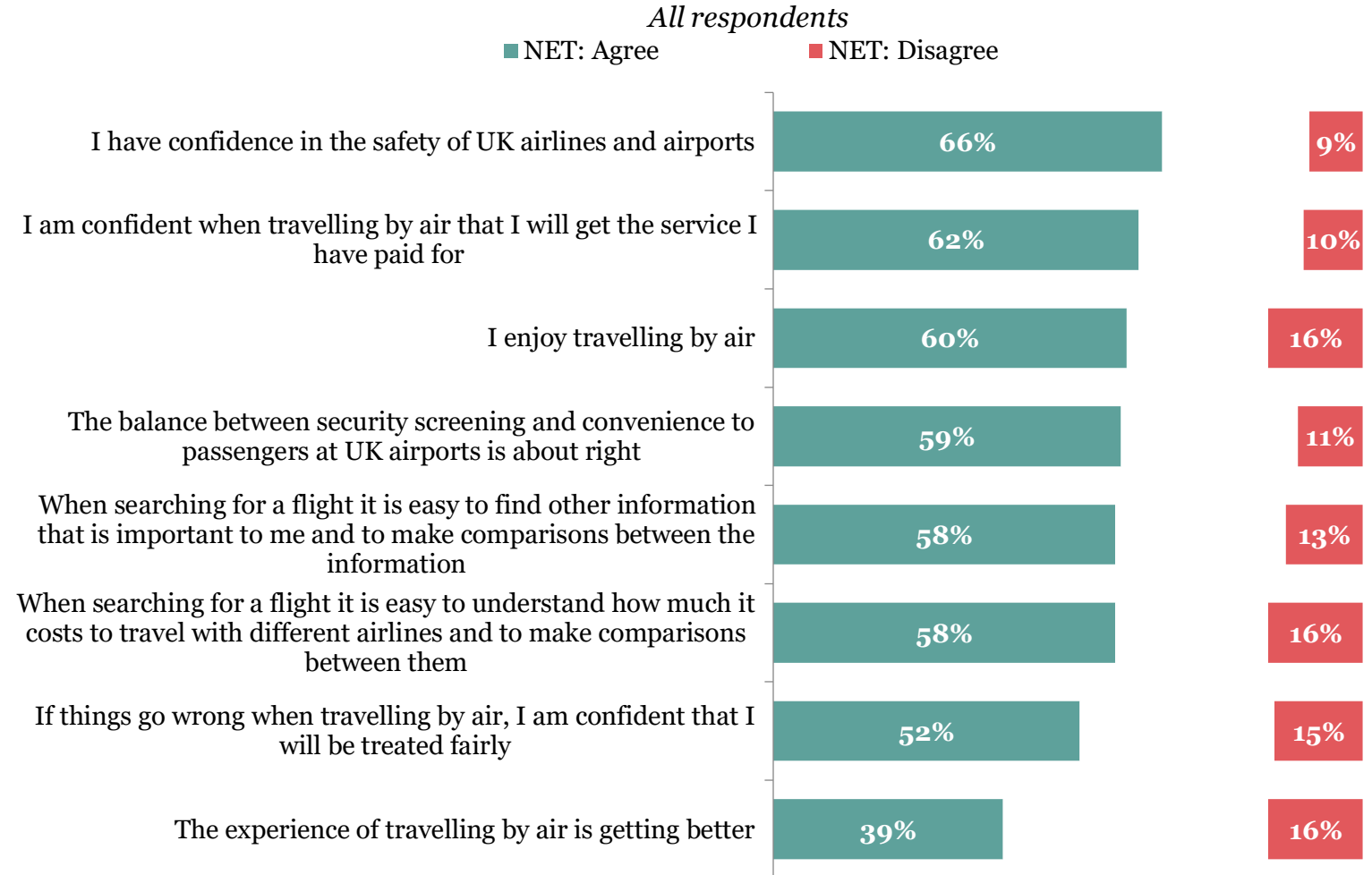
All 2020 fieldwork took place in autumn, during the COVID-19 pandemic.

Two thirds (66%) of respondents say they have confidence in the safety of UK airlines and airports, with 59% saying the balance between security and convenience is about right.

Generally speaking, UK adults are confident in receiving a good and fair service (62% and 52% respectively).

There is also broad satisfaction with the process of searching for a flight, finding information and understanding costs (58% for both).

Statements about travelling by air - General

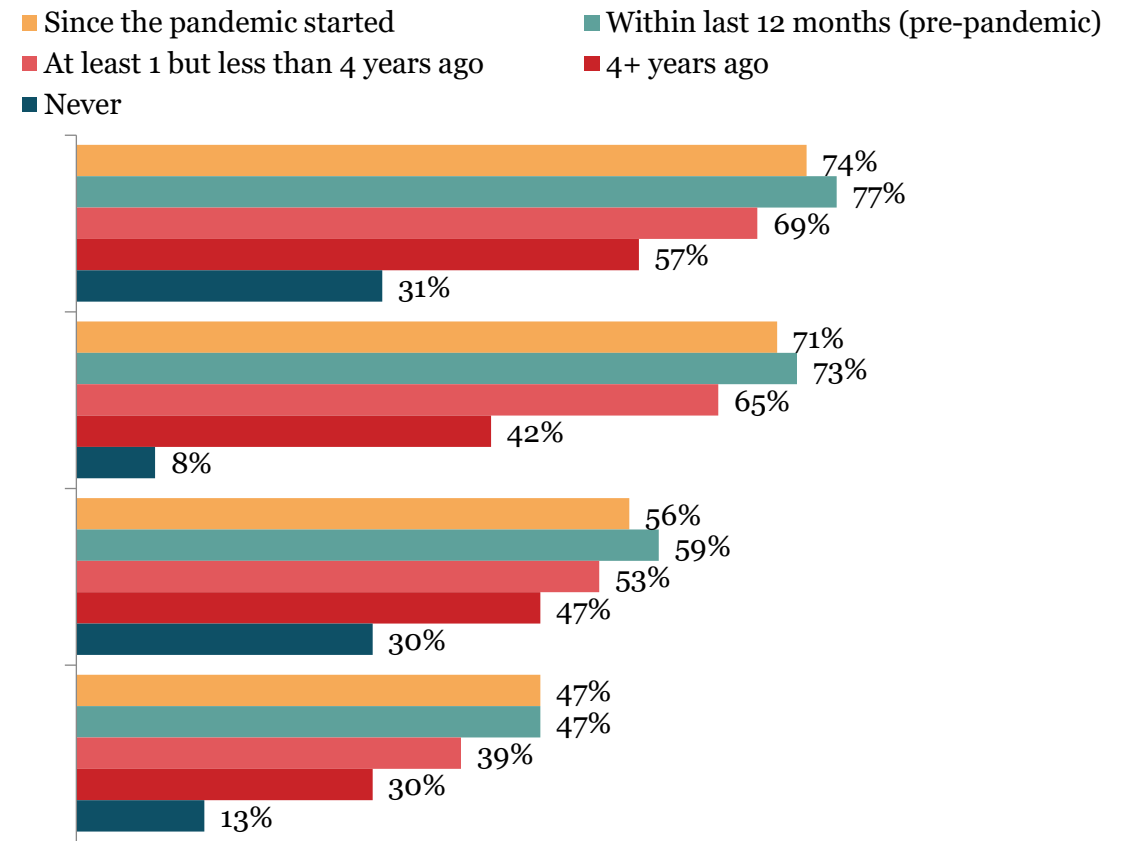


Those who have flown in the last 12 months are more likely to agree with all metrics tested than those who have flown at other points in time, the pandemic has not significantly impacted perceptions

Statements about travelling by air
All respondents



Statements about travelling by air
Showing percentage who **agree** – by time of last flight



Confidence in the safety of UK airlines and airports has fallen this wave

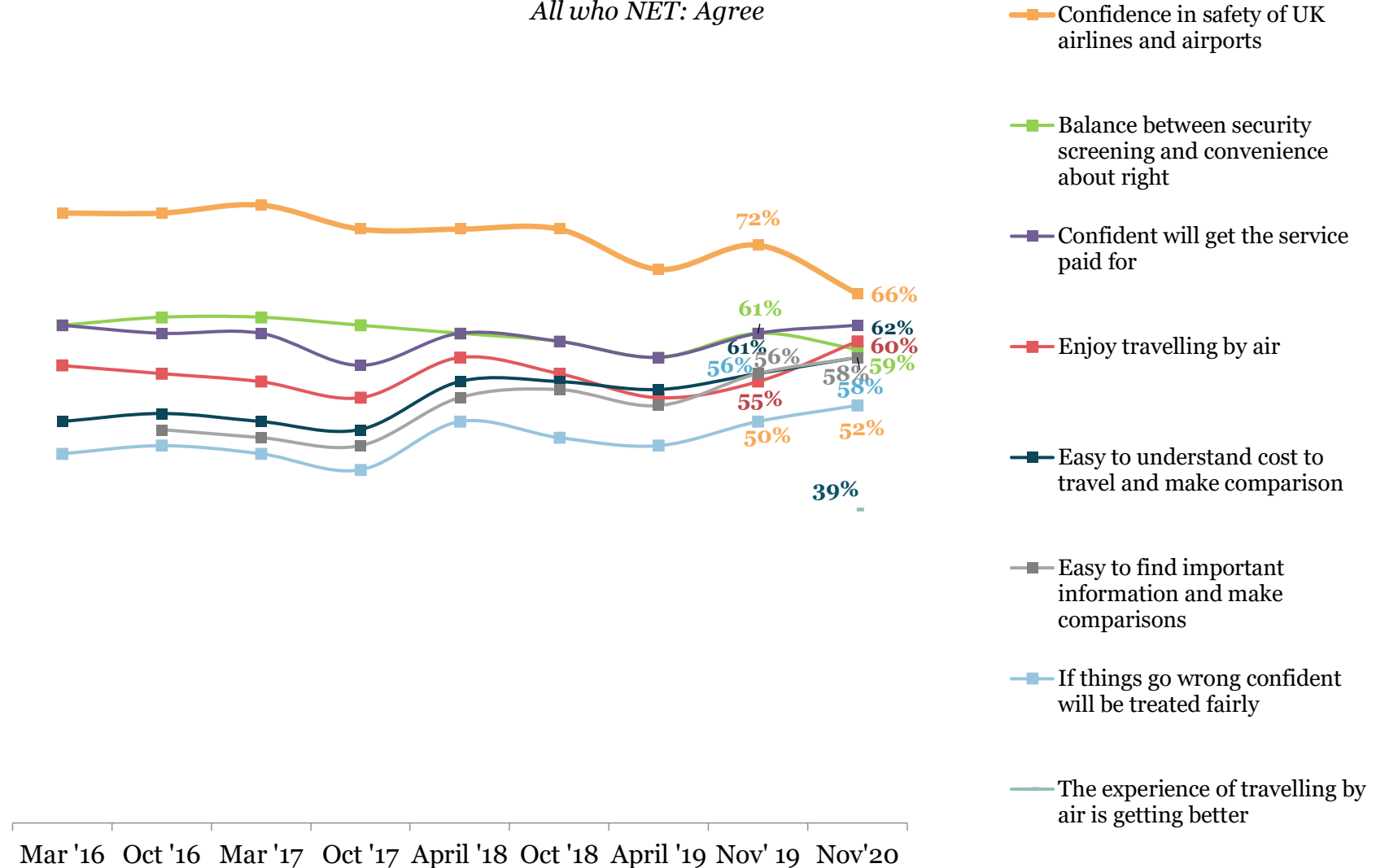
Confidence in safety of UK airports and airlines has dropped by 6 percentage points in the last 12 months (72% to 66%).

The share of those who say they enjoy travelling by air has risen by 5 percentage points, taking the proportion to three in five (60%) of those who have flown in the last 12 months.

The proportion of respondents who would pay more to reduce environmental impact or think about the impact of flying on the environment continues to rise.

Headline Measures: Trend

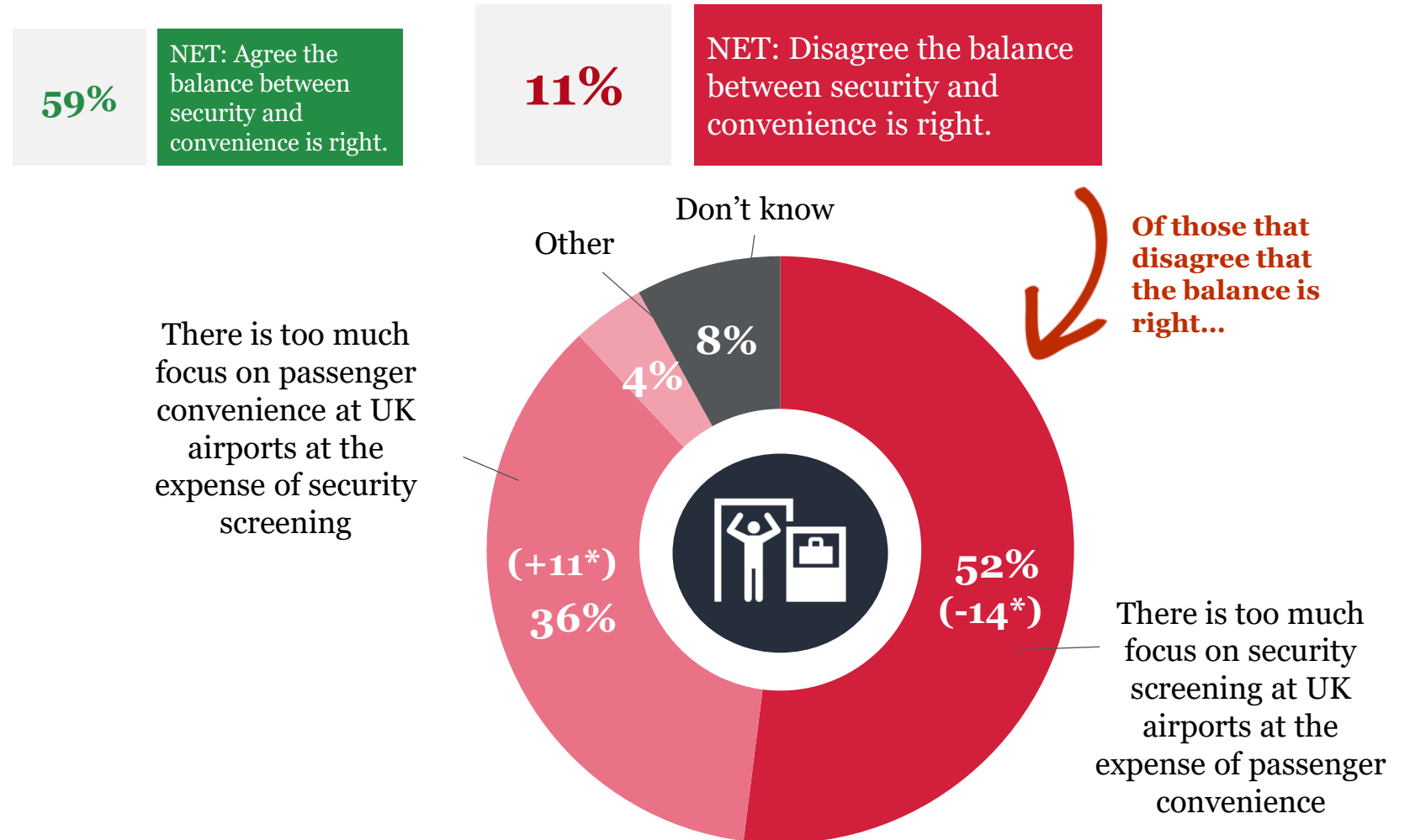
All who NET: Agree



The majority of people still think that the balance between security and convenience is right

Three in five (59%) respondents agree that the balance between security and convenience is right. Of those who disagree, half (52%) think there is too much focus on security screening at UK airports, down 14 percentage points from wave 8.

A third (36%) think there is too much focus on passenger convenience at UK airports at the expense of security screening, up 11 percentage points. This may be another effect of COVID-19, where more respondents want to feel secure when flying and think there should be more done in this regard.



*Differences from wave 8 (Oct '20) results

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 2020 respondents (n=3504), All Nov 2019 respondents (n=3501). 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=396), Nov 2019 (n=453)

In a year when far fewer people than normal have flown, three in five of all respondents say they enjoy travelling by air

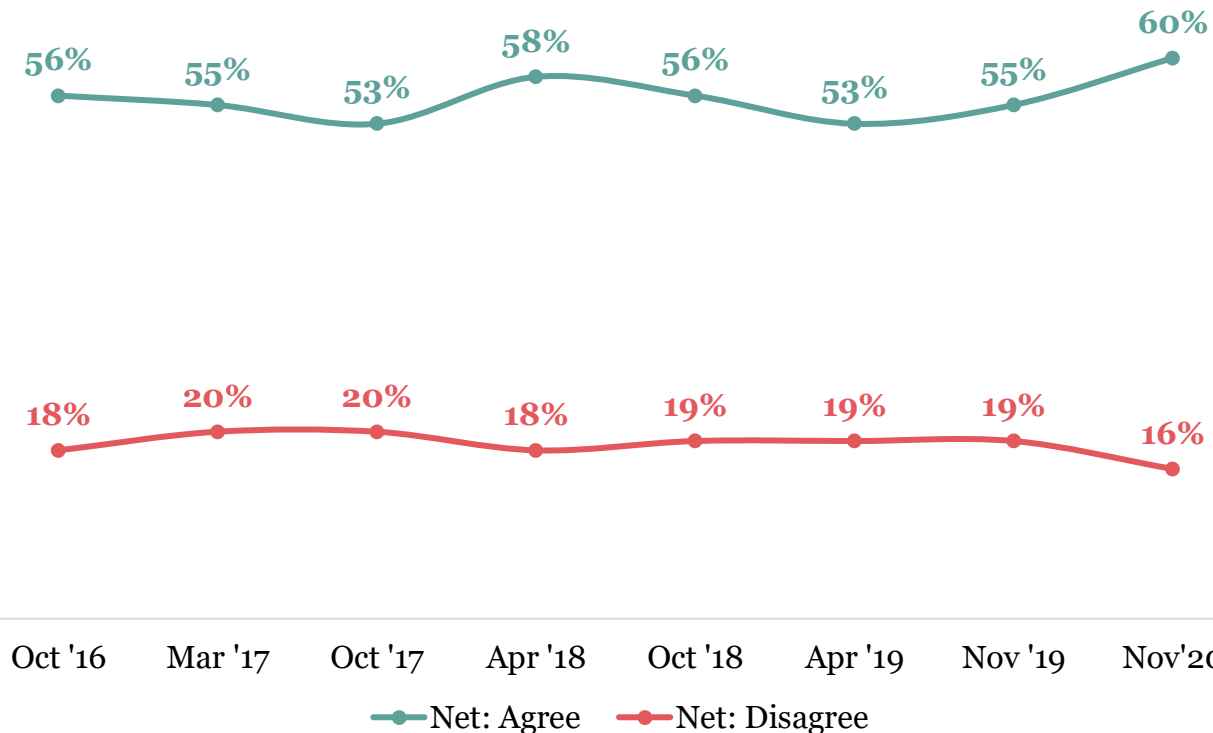
Question asked to all respondents, including non-recent fliers.

All 2020 fieldwork took place in autumn, during the COVID-19 pandemic.

In a year when far fewer people than normal have flown, three in five (60%) respondents say they enjoy travelling by air, up by 5 percentage points from wave 8. This is the highest recorded score, eclipsing the 58% recorded in April 2018.

Headline measures: Overall

I enjoy travelling by air



Wave 9 (November 2020) percentage who agree by time of last flight

Since the pandemic started	71%
Within the last 12 months (but pre-pandemic)	73%
At least 1 but less than 4 years ago	65%
4+ years ago	42%
Never	8%

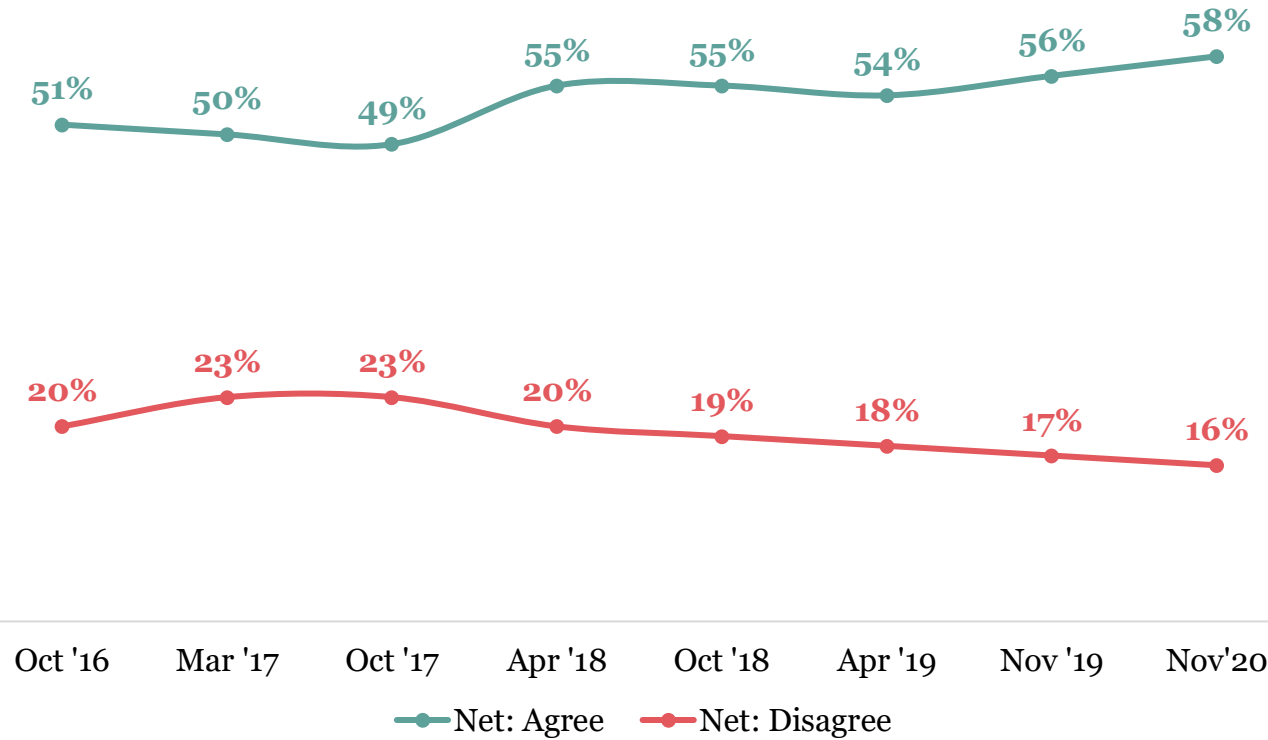
More UK adults strongly agree that it is easier to understand the cost of travel and find comparison information than ever before

Headline measures: Consumer Choice

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

Question asked to all respondents, including non-recent fliers.

All 2020 fieldwork took place in autumn, during the COVID-19 pandemic.



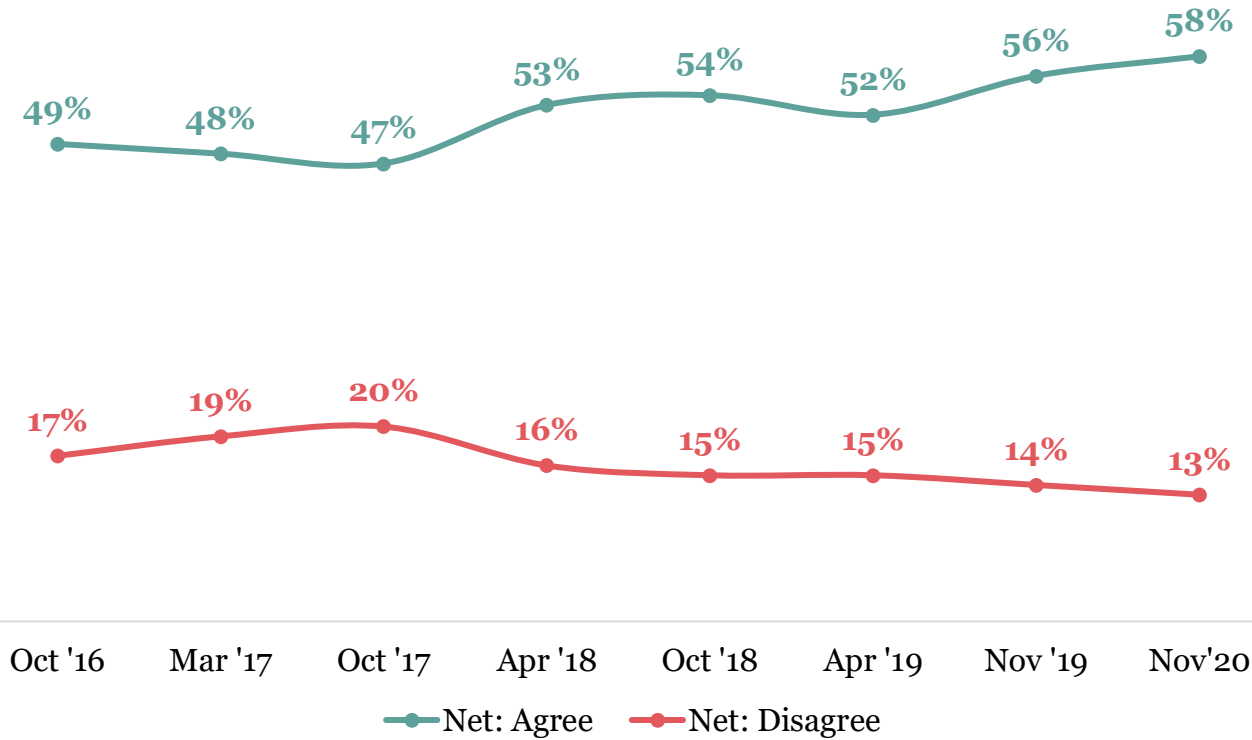
Wave 9 (November 2020) percentage who agree by time of last flight

Since the pandemic started	65%
Within the last 12 months (but pre-pandemic)	70%
At least 1 but less than 4 years ago	61%
4+ years ago	47%
Never	27%

The proportion saying it is easy to find other information important to them and make comparisons has risen to the highest ever tested

Headline measures: Consumer Choice

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



Question asked to all respondents, including non-recent fliers.

All 2020 fieldwork took place in autumn, during the COVID-19 pandemic.

**Wave 9
(November 2020)
percentage who agree by time of last flight**

Since the pandemic started	70%
Within the last 12 months (but pre-pandemic)	69%
At least 1 but less than 4 years ago	60%
4+ years ago	46%
Never	23%

Confidence that respondents will get the service they paid for remains relatively static

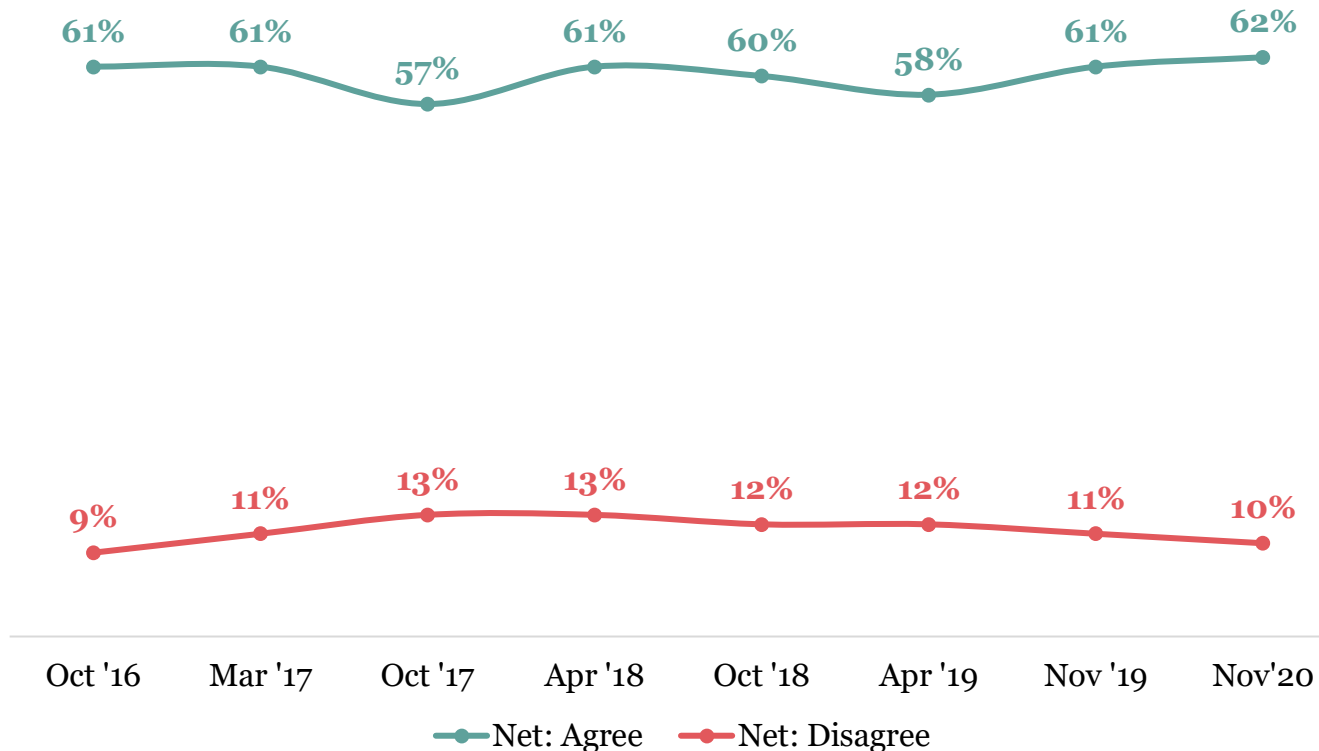
Question asked to all respondents, including non-recent fliers.

All 2020 fieldwork took place in autumn, during the COVID-19 pandemic.

One in five (20%) say they strongly agree that they are confident that they will get the service they paid for.

Headline measures: Consumer Confidence

Confident I will get the service I paid for



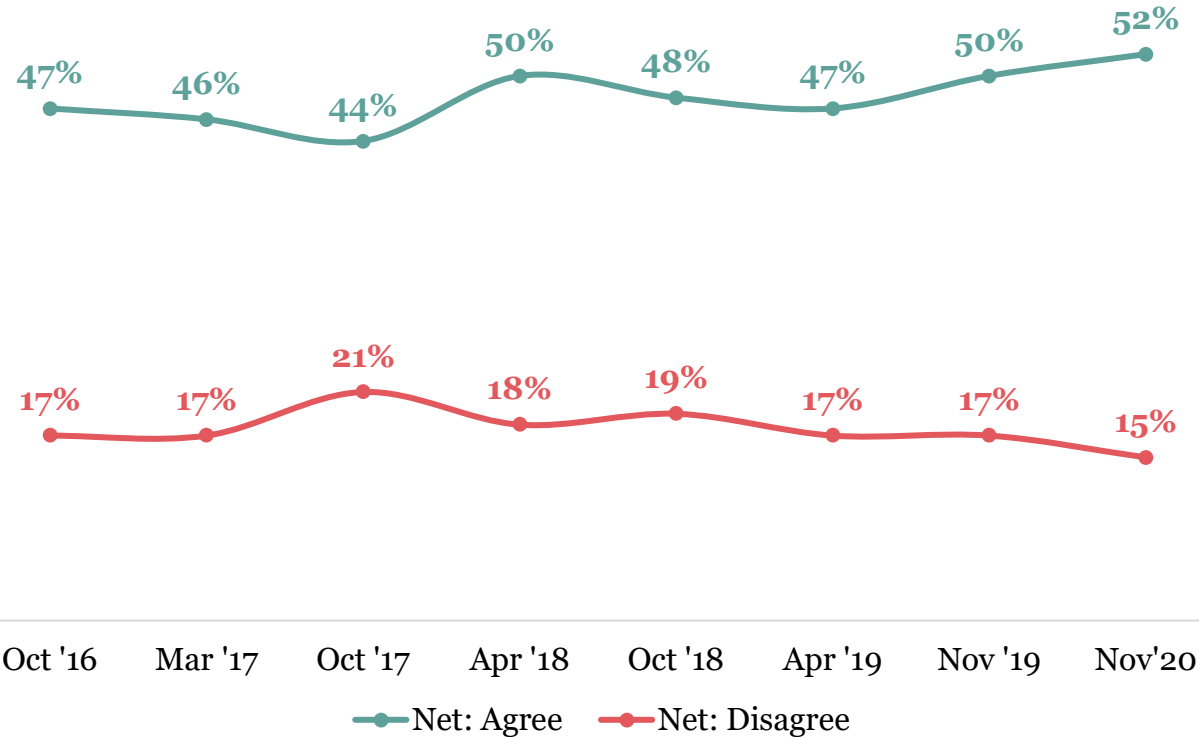
Wave 9 (November 2020) percentage who agree by time of last flight

Since the pandemic started	68%
Within the last 12 months (but pre-pandemic)	72%
At least 1 but less than 4 years ago	67%
4+ years ago	51%
Never	26%

Confidence in fair treatment when things go wrong has slightly increased since Nov 2019

Headline measures: Consumer Confidence

If things go wrong, I am confident I will be treated fairly



Question asked to all respondents, including non-recent fliers.

All 2020 fieldwork took place in autumn, during the COVID-19 pandemic.

Confidence that adults will be treated fairly when things go wrong is at its highest since tracking began.

Wave 9 (November 2020) percentage who agree by time of last flight

Since the pandemic started	56%
Within the last 12 months (but pre-pandemic)	59%
At least 1 but less than 4 years ago	53%
4+ years ago	47%
Never	30%

In the midst of a global pandemic, confidence in the safety of UK airlines and airports is at its lowest since tracking began

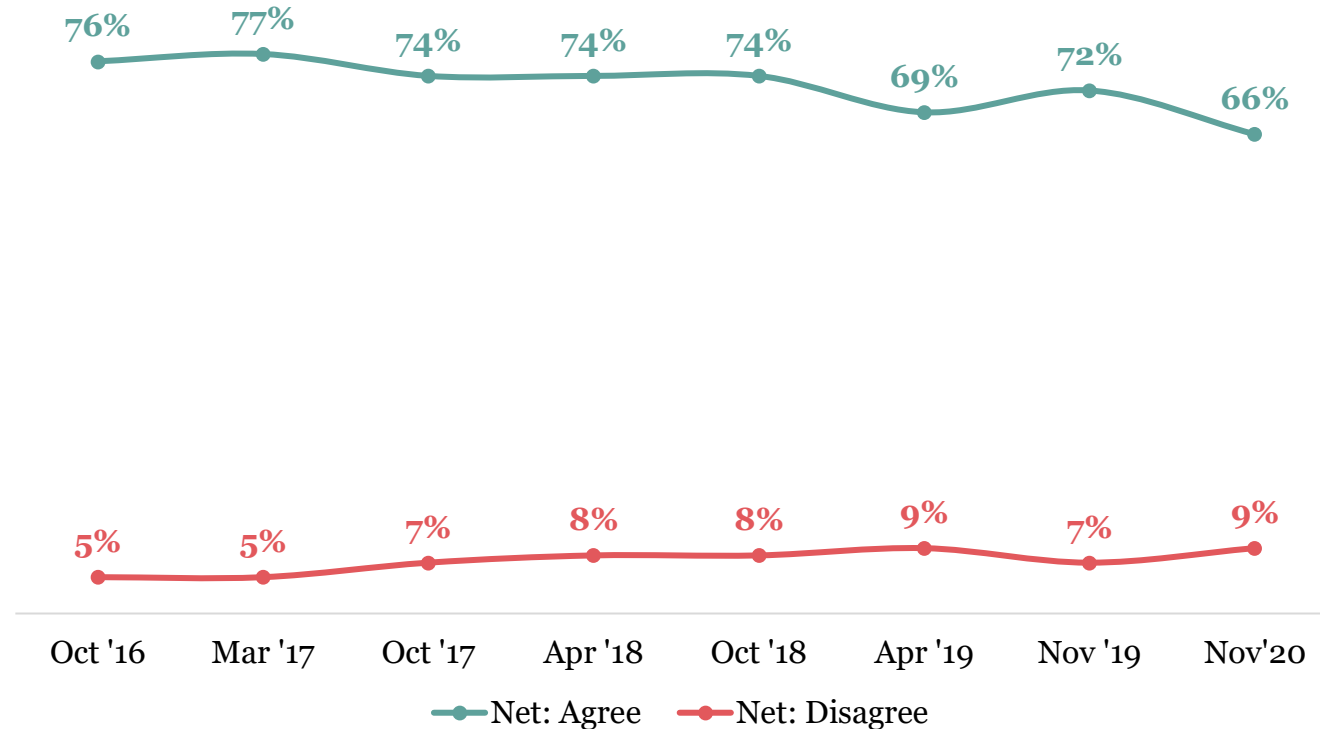
Question asked to all respondents, including non-recent fliers.

All 2020 fieldwork took place in autumn, during the COVID-19 pandemic.

Low confidence in the safety of UK airlines and airports is mainly driven by those who do not fly (31%) or last flew 4+ years ago (57%). The vast majority of those who have flown in the last year are confident in the safety of UK airlines and airports, both before and since the pandemic began.

Headline measures: Consumer Safety

Confidence in the safety of UK airlines and airports



Wave 9 (November 2020) percentage who agree by time of last flight

Since the pandemic started	74%
Within the last 12 months (but pre-pandemic)	77%
At least 1 but less than 4 years ago	69%
4+ years ago	57%
Never	31%

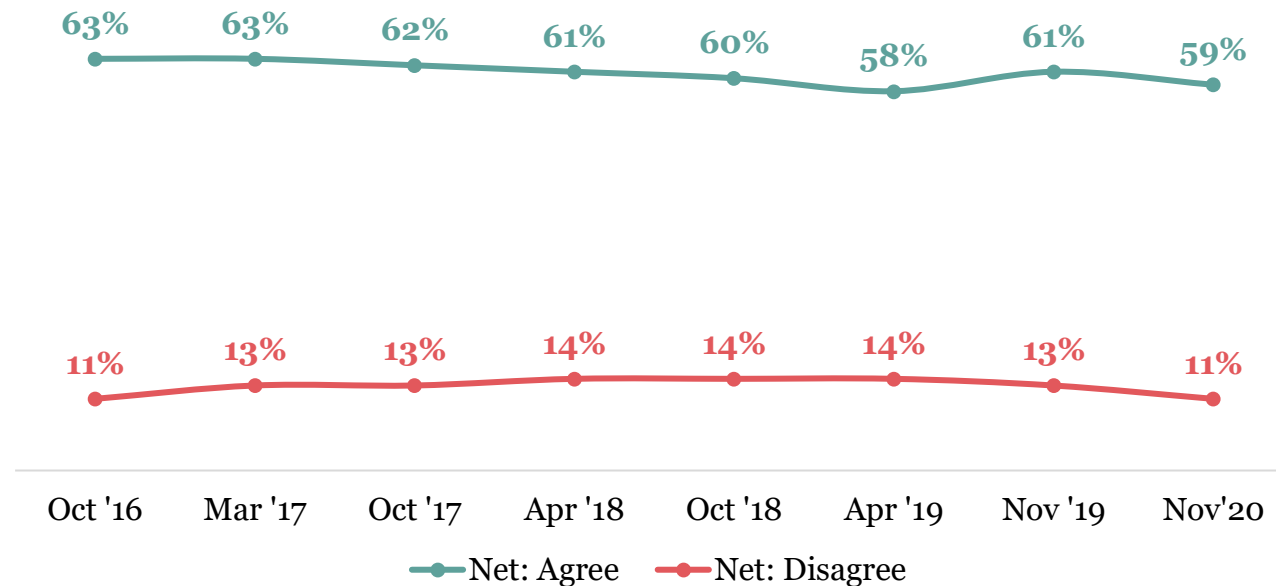
Views on the balance between security screening and convenience have remained similar to previous waves

Headline measures: Consumer Safety

Balance between security screening and convenience about right

Question asked to all respondents, including non-recent fliers.

All 2020 fieldwork took place in autumn, during the COVID-19 pandemic.



Wave 9 (November 2020) percentage who agree by time of last flight

Since the pandemic started	68%
Within the last 12 months (but pre-pandemic)	67%
At least 1 but less than 4 years ago	64%
4+ years ago	48%
Never	24%

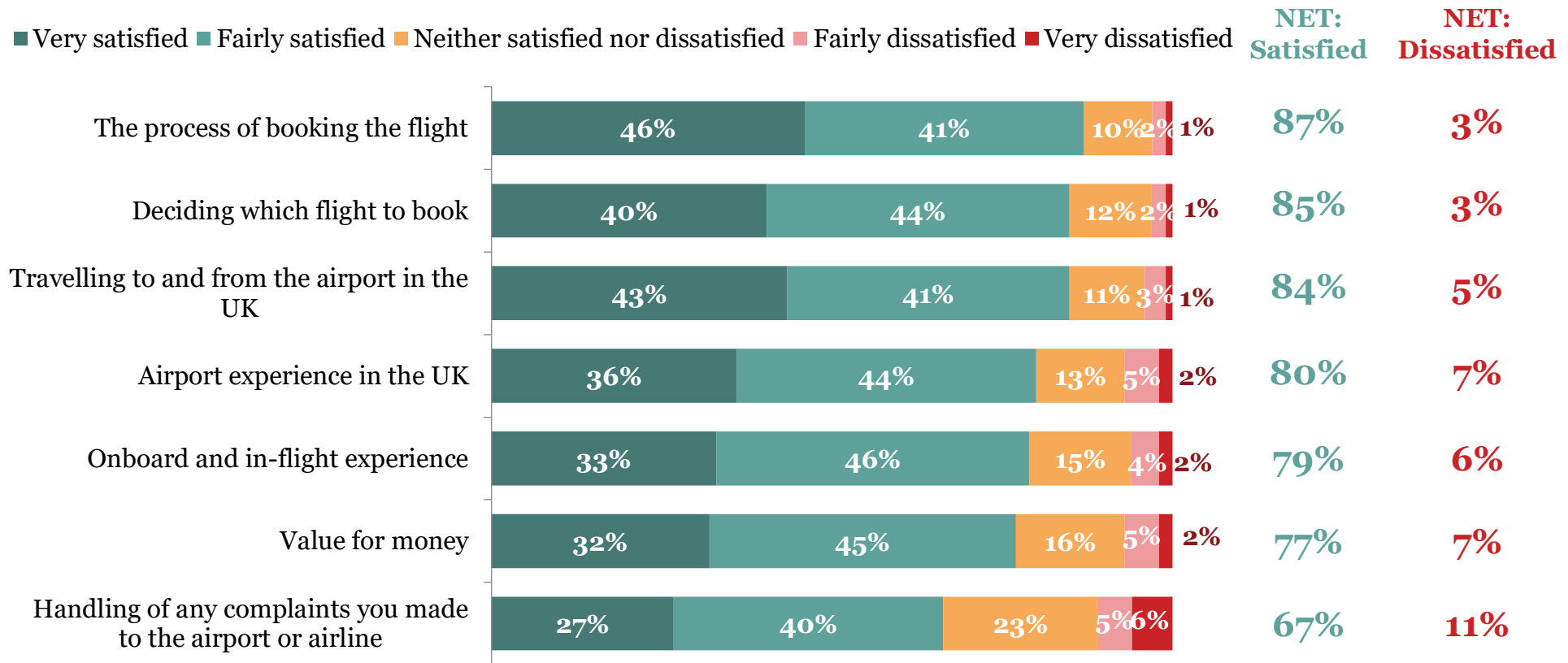
Satisfaction ratings



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

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

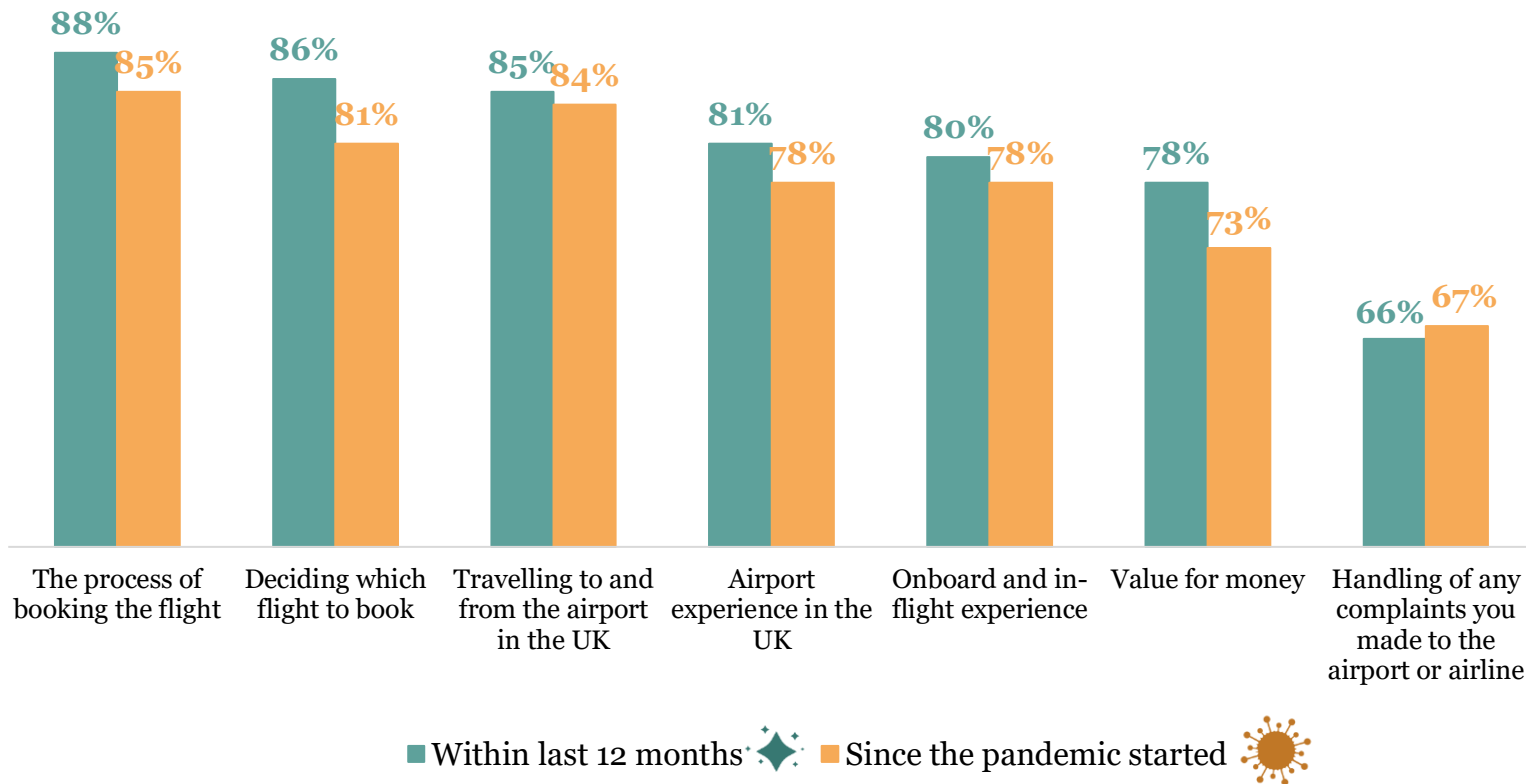
All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



Passengers in the last 12 months who flew before the pandemic are slightly more likely to be satisfied with aspects of their most recent flight than those who have flown since the pandemic started

Last flight: Satisfaction with elements of the journey

All who say NET: Satisfied



In nearly all the metrics on their most recent flight, passengers who flew in the months before the pandemic are slightly more likely to say they were satisfied than those who have flown since.

The largest differences between those who flew before the pandemic and those who have flown during can be seen in passengers deciding which flight to book (86% and 81% respectively) and in satisfaction with value for money (78% vs 73% respectively).

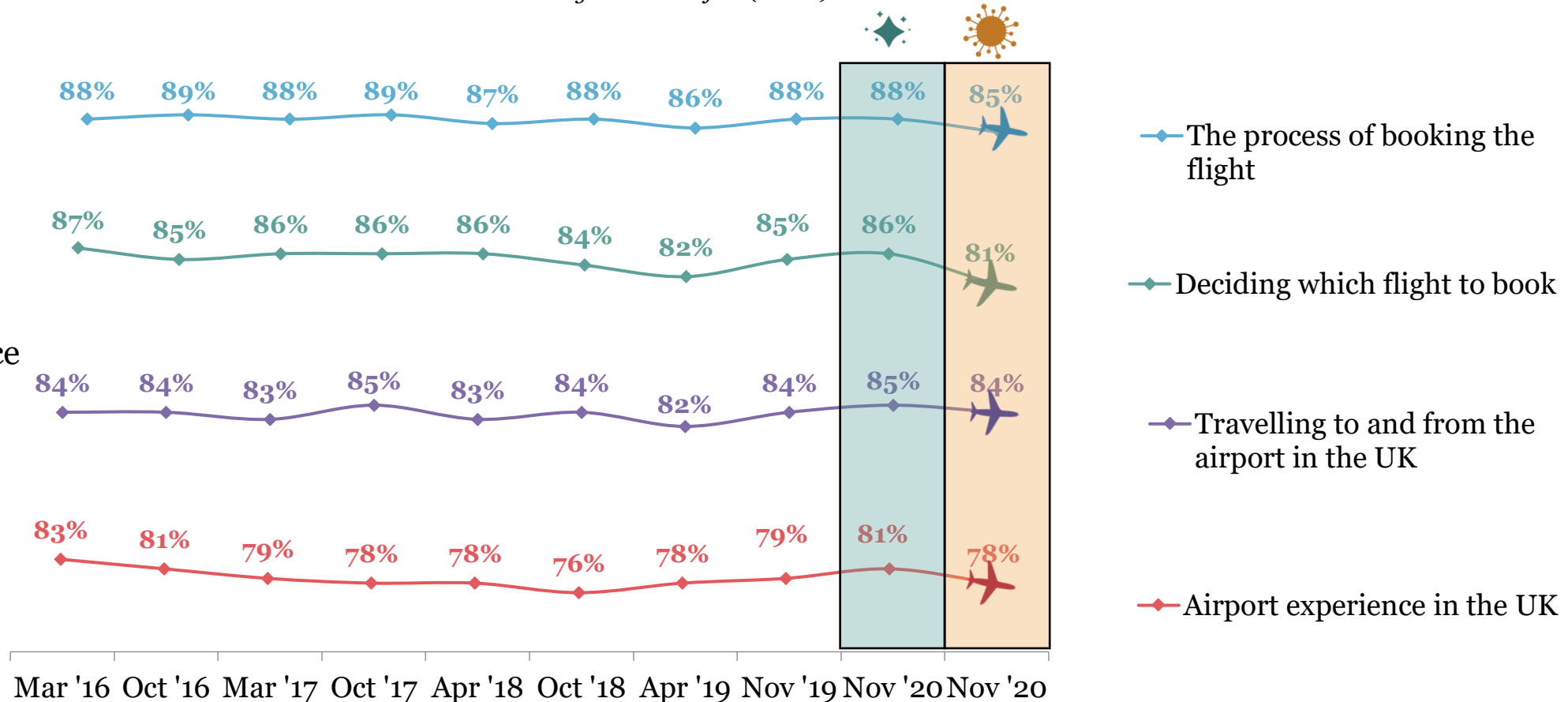
Satisfaction with the different aspects of recent flights have remained relatively stable since Wave 8 in Nov 2019

Last flight: Satisfaction with elements of the journey

All who say NET: Satisfied (Part 1)

Satisfaction among pre-pandemic fliers in November 2020 was level with or higher than November 2019 on all metrics.

Those who have flown since the pandemic are more negative on each measure tested, particularly that of deciding which flight to book.



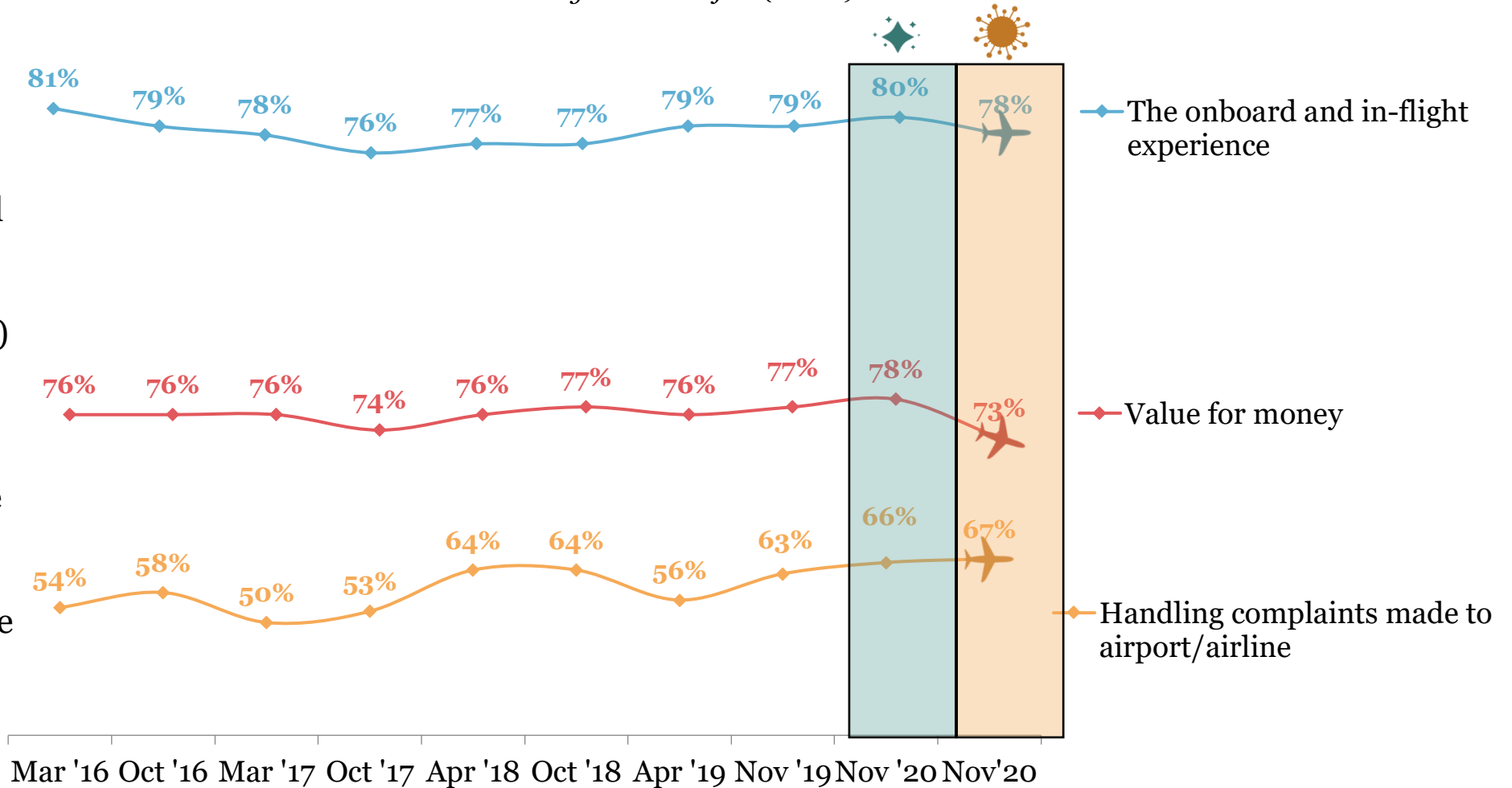
Satisfaction with complaints handling made to the airport/airline is at its ever highest level

Last flight: Satisfaction with elements of the journey

All who say NET: Satisfied (Part 2)

Satisfaction with the onboard and in-flight experience (78-80%) has remained stable since April 2019. Value for money (73% among those flying since the pandemic started) is at its lowest point since testing began.

Handling complaints made to airport/airline has seen an increase taking it to 66-67%, the highest score since tracking began in March 2016.

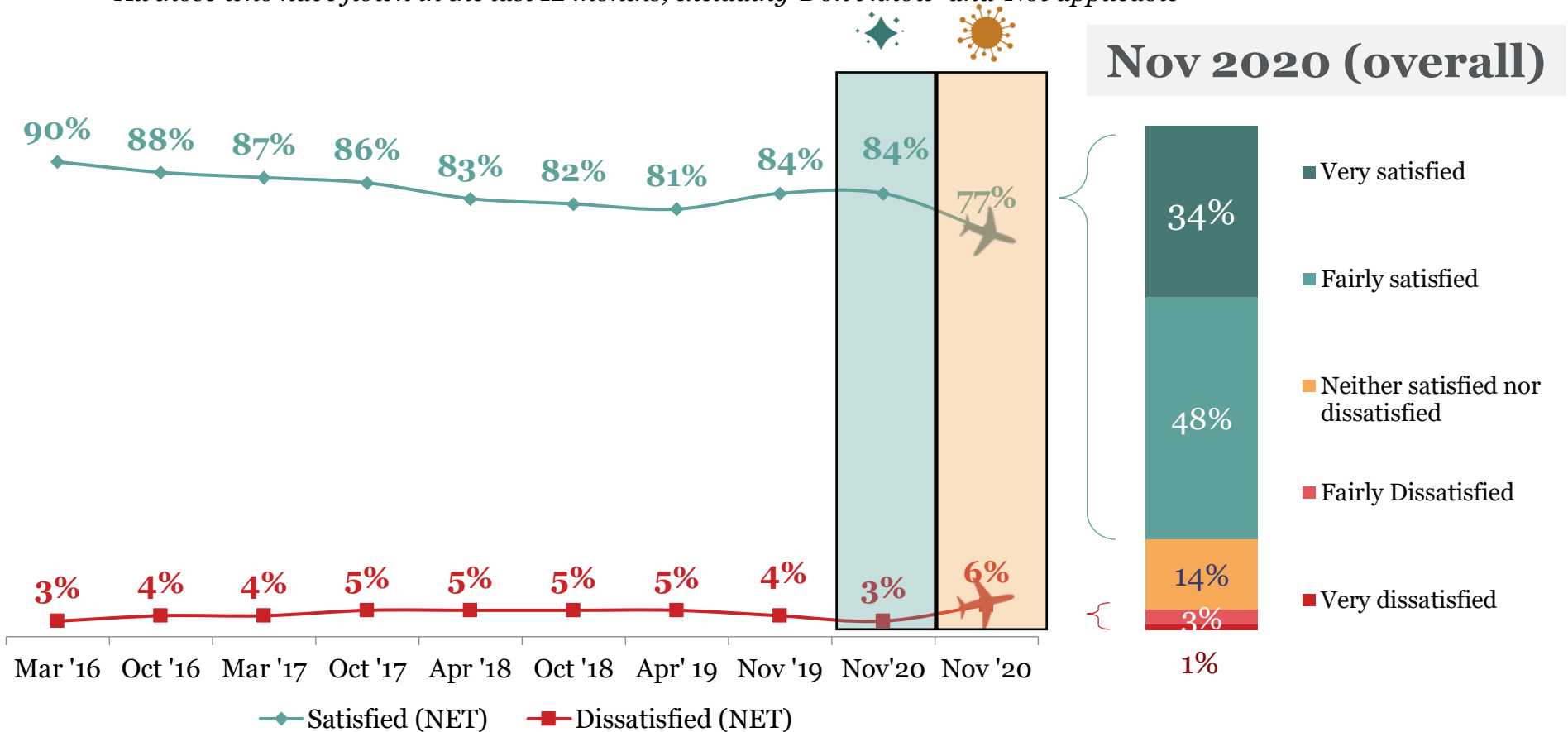


Satisfaction with the overall travel experience is at its lowest since testing began (among those who have flown since the pandemic began)

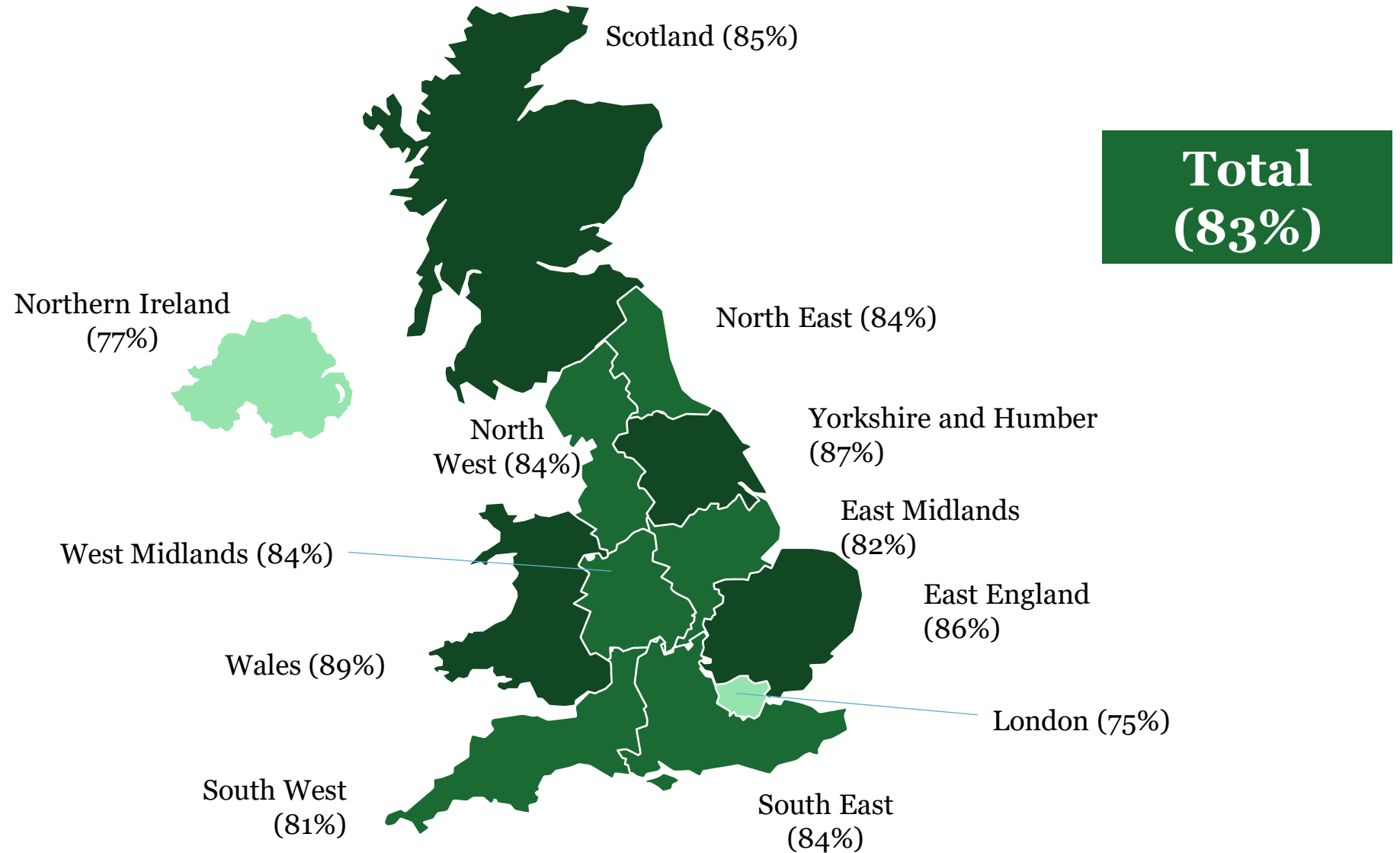
Overall satisfaction among those who flew before the pandemic is level with previous waves, but drops notably among those who have flown since the pandemic began.

Last flight: Overall travel experience

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



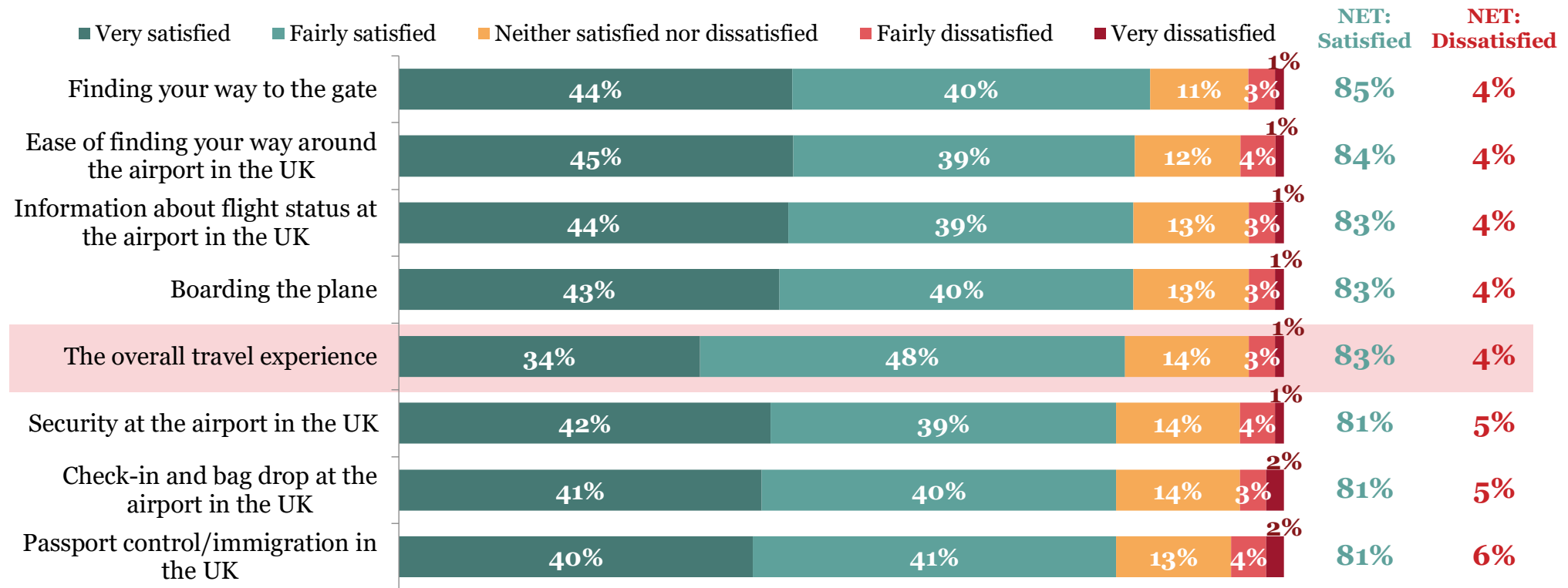
Last flight: Showing NET: Satisfaction with overall travel experience – by region



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

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

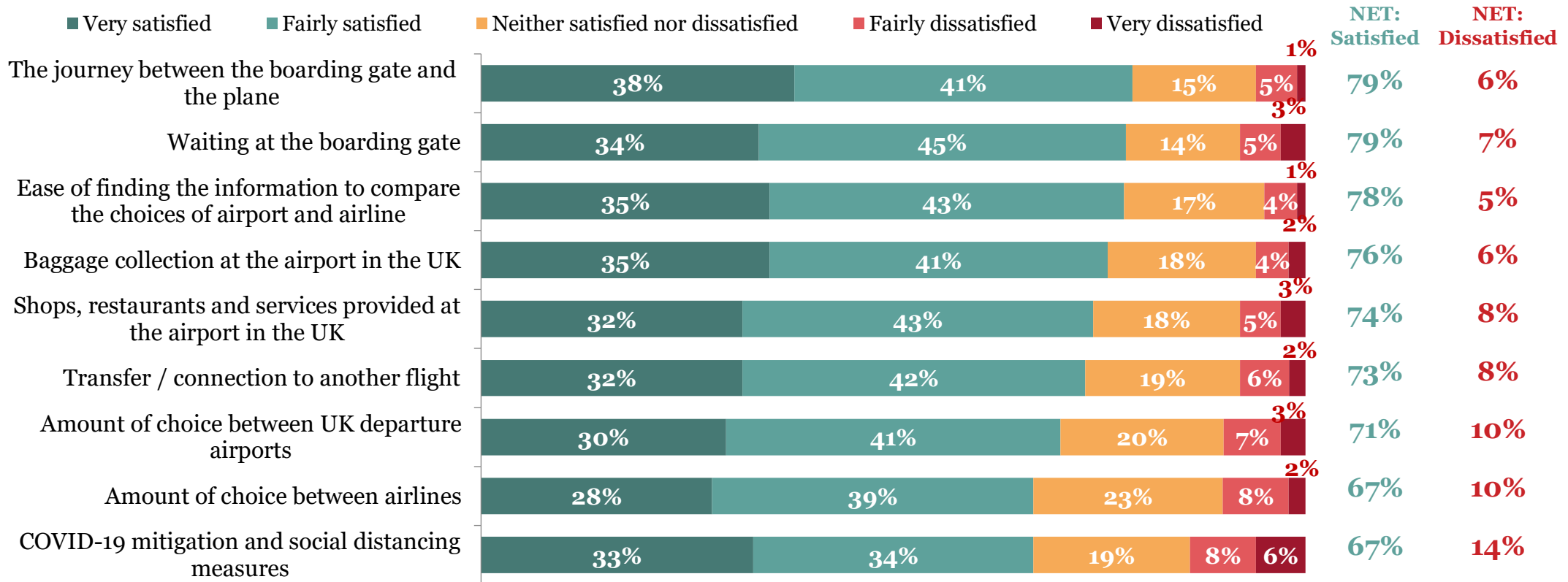
All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



Recent passengers are least likely to have been satisfied with COVID-19 mitigation and social distancing measures, the amount of choice between airlines or between UK departure airports

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

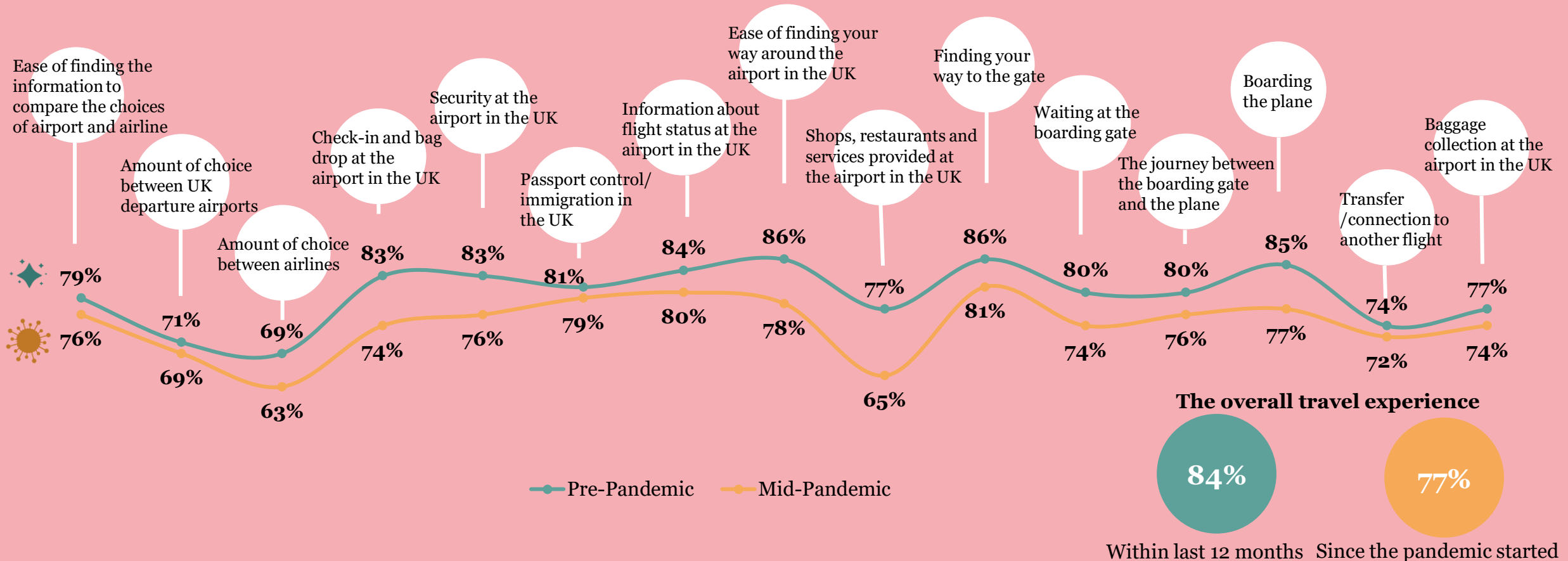
All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



Passengers who flew in the months before the pandemic are slightly more likely to be satisfied with their airport experience than those who have flown since the pandemic started

Last flight: Satisfaction with airport experience

All who say NET: Satisfied

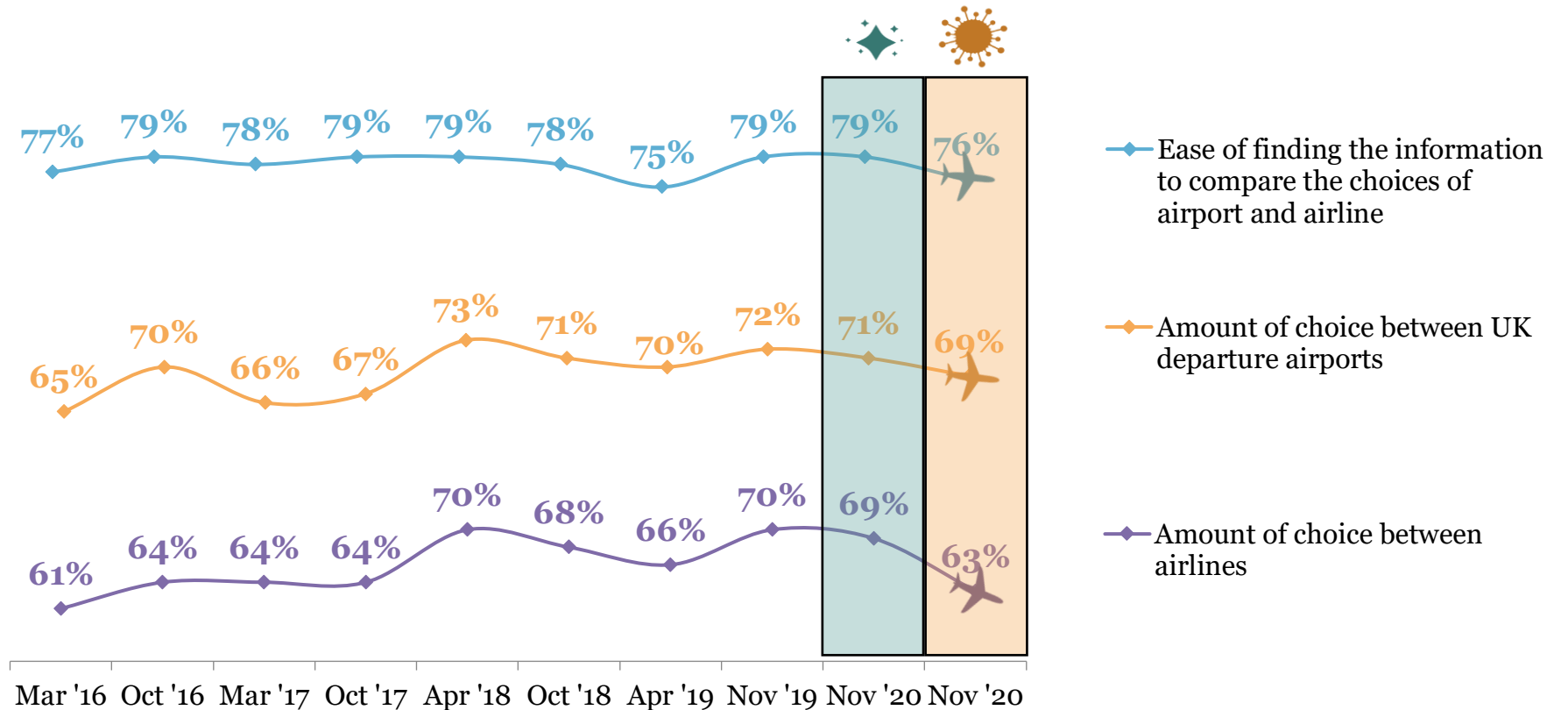


Levels of satisfaction with each element of the pre-booking process have remained relatively consistent, though choice between airlines slightly dropped

Last flight: Satisfaction with elements of pre-booking

All who say NET: Satisfied

While ease of finding information to compare the choice of airport and airline and the amount of choice between UK departure airports have remained relatively consistent, the amount of choice between airlines has seen a slight decrease, potentially due to airports adjusting to the decreased demand for flights in 2020.



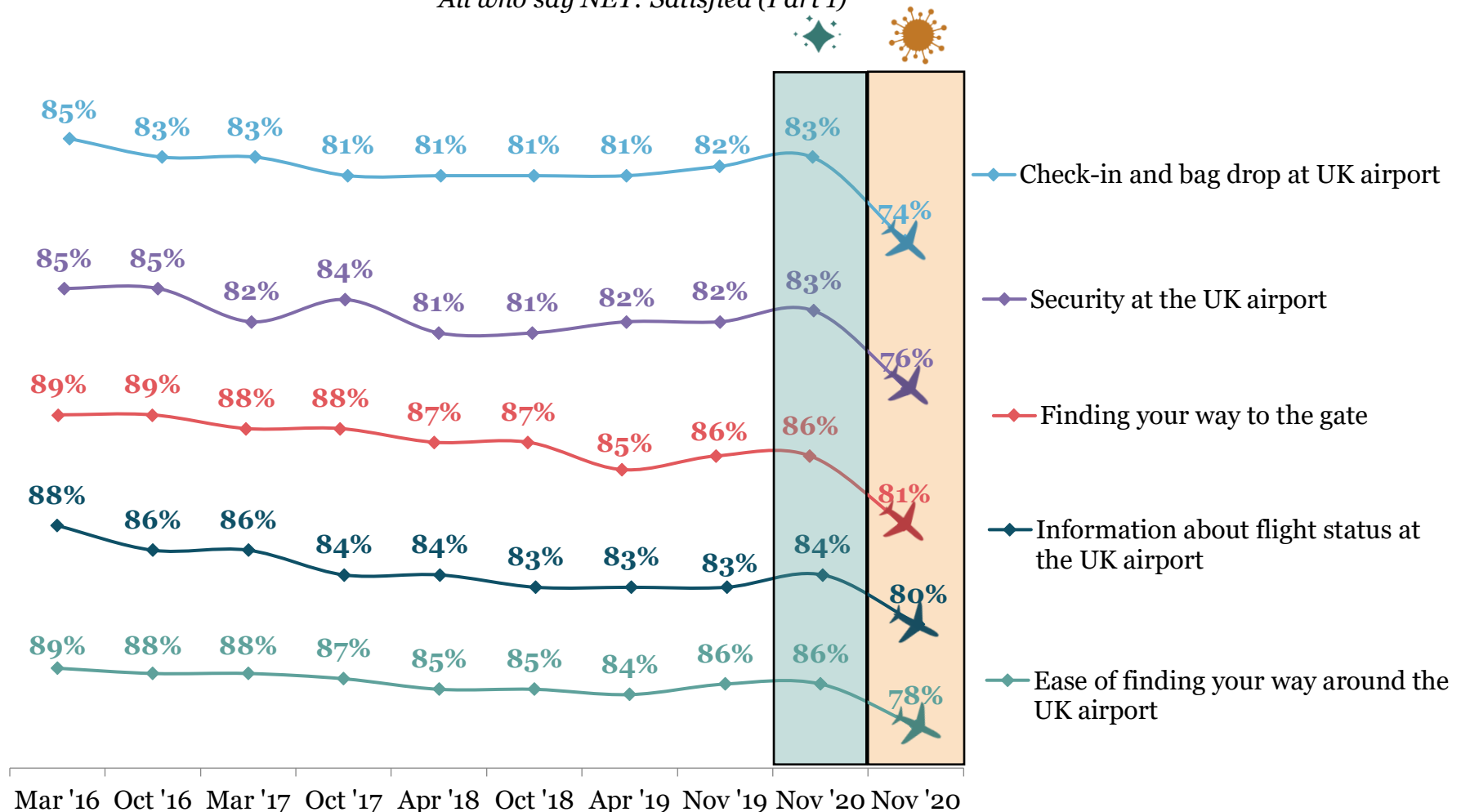
Passengers' ease of finding their way around the UK airport has seen a drop, potentially due to COVID-19 mitigation strategies

Last flight: Satisfaction with airport experience

All who say NET: Satisfied (Part 1)

Recent flyers' satisfaction with each of these areas of the UK airport experience is consistent with the levels recorded in November 2019.

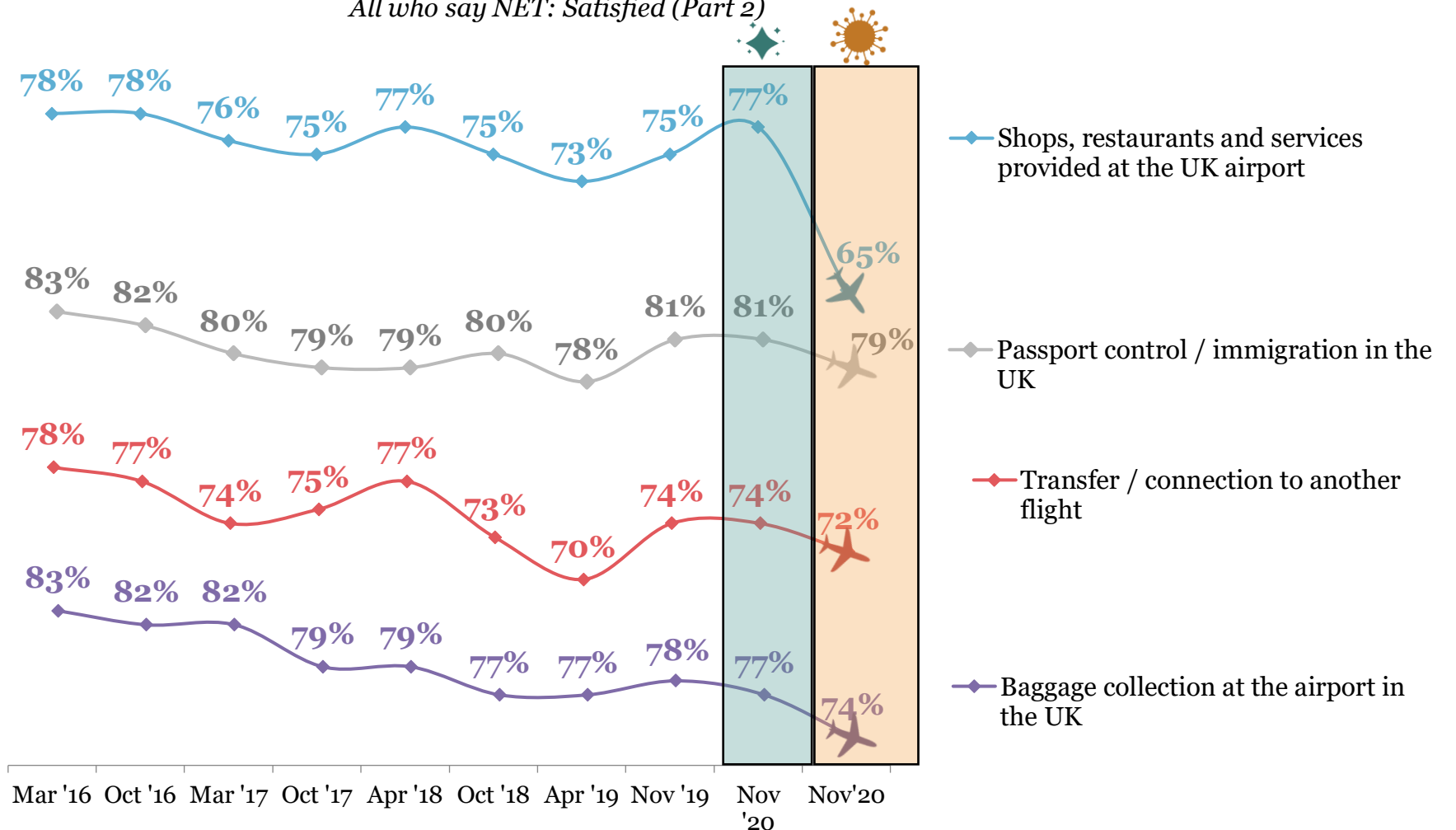
Passengers' ease of finding their way around the UK airport has returned to its Apr 19 low of 84%. This is probably linked to the increase in COVID-19 mitigation and one-way pathing measures, as just 78% of passengers who have flown since the pandemic are satisfied with this measure



Satisfaction with shops, restaurants and services provided at the UK airport has sharply declined

Last flight: Satisfaction with airport experience

All who say NET: Satisfied (Part 2)



Satisfaction with all metrics tested has fallen since the pandemic began. This is most significant for satisfaction with shops, services and restaurants provided at the airport, which has fallen 12 percentage points since the pandemic started last wave (77% within the last 12 months pre-pandemic vs. 65% since the pandemic started).

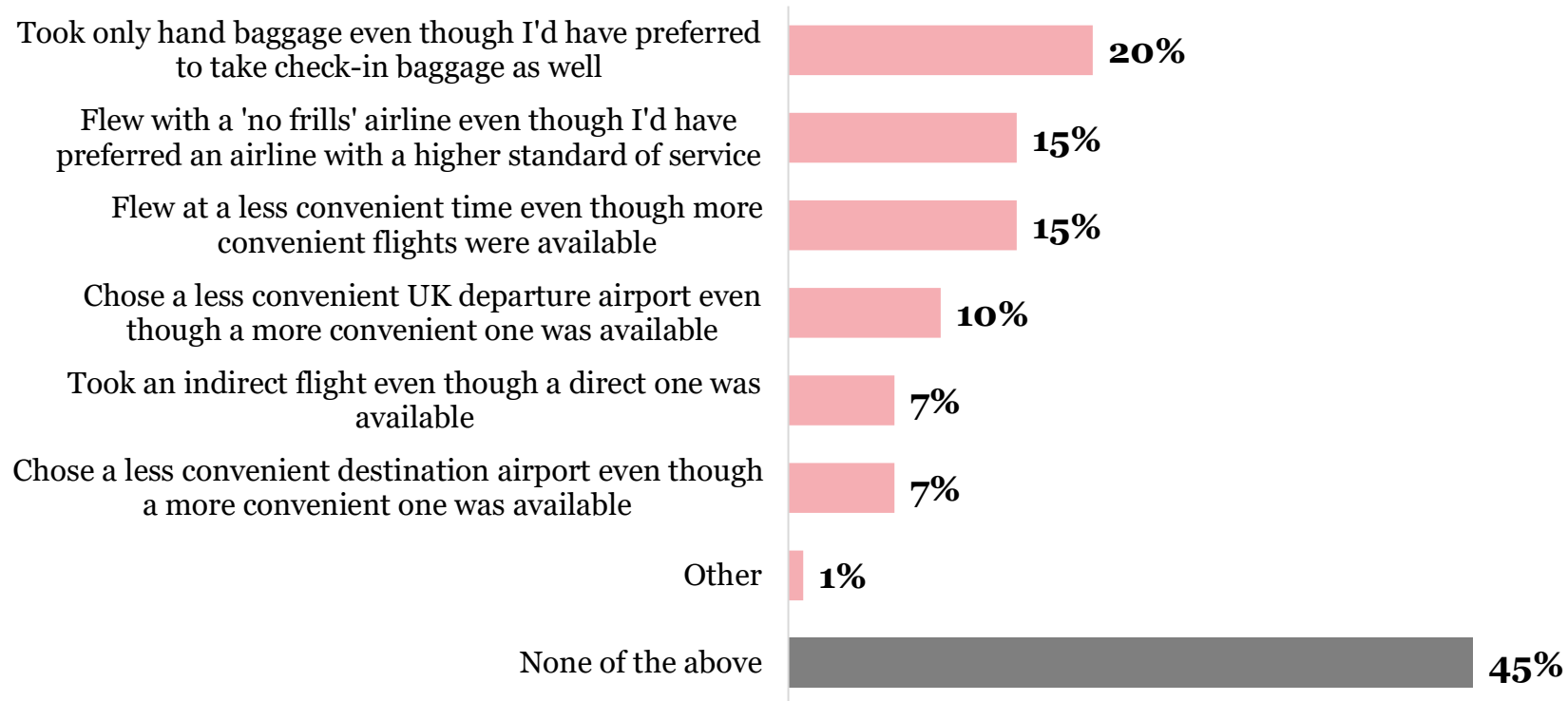
Flying Behaviour



Out of those who have flown in the past year, one in five passengers took only hand baggage as a cost saving measure

Measures to save money

Showing % who say the following

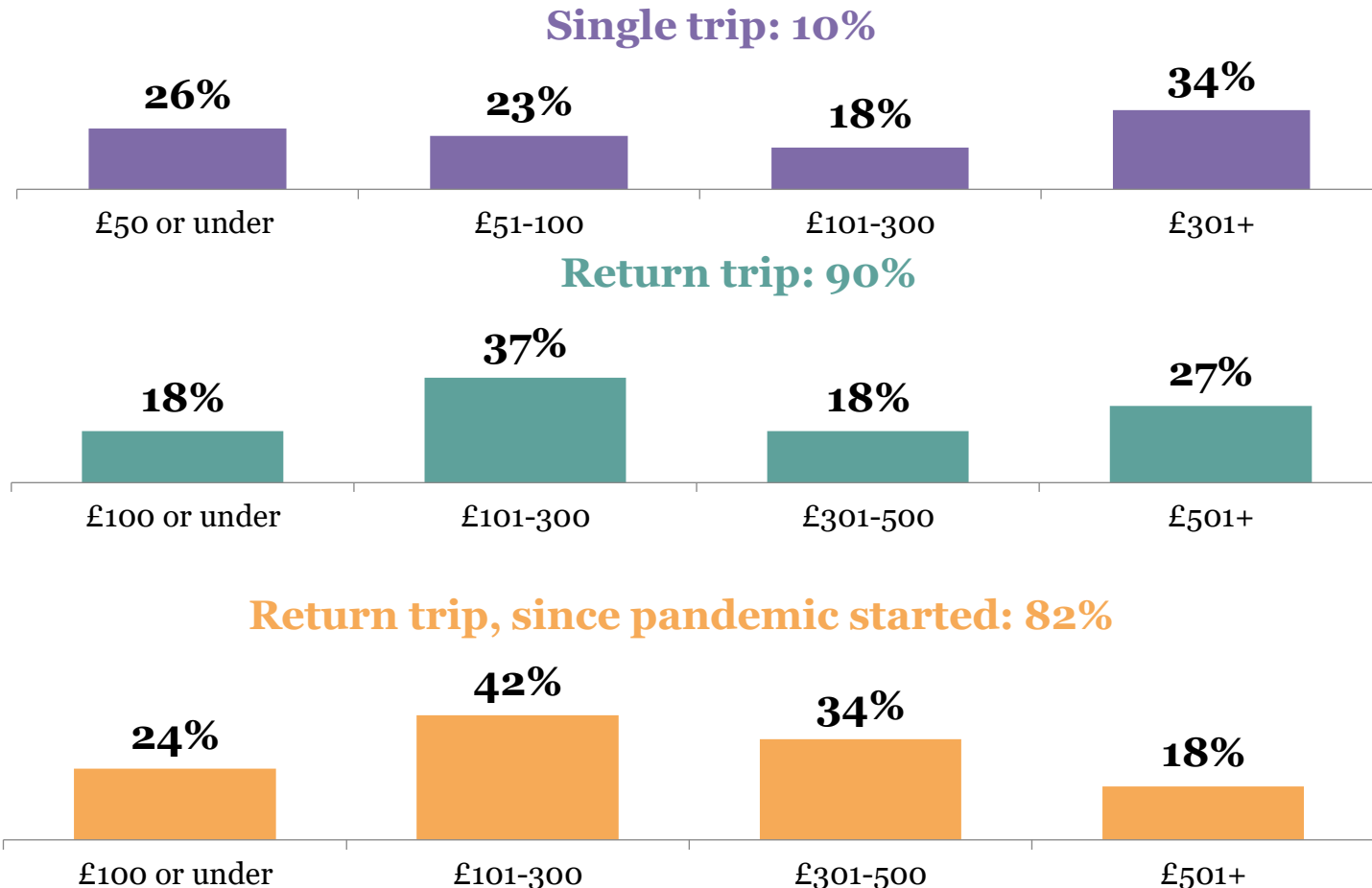


One in five (20%) passengers took only hand baggage even though they would have preferred to have taken in check in luggage as well. A similar proportion (15%) of passengers flew with a 'no frills' airline or flew at a less convenient time as cost saving measures. Just under half (45%) of passengers did not take any of the listed measures.

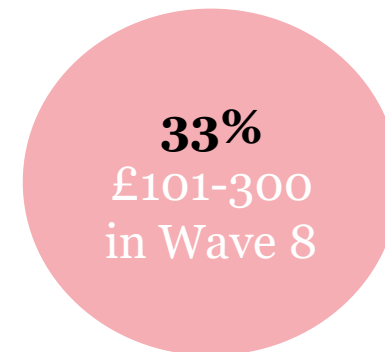
The majority of trips made are return trips and most likely to be in the £101-300 price bracket

Price paid for last flight

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



Nine in ten (90%) passengers who flew from a UK airport in the past 10 years purchased a return ticket, with the most common fare range for return trips being £101-300. Over a third (37%) of respondents fit in this bracket, up 4 percentage points from the 33% registered in wave 8.

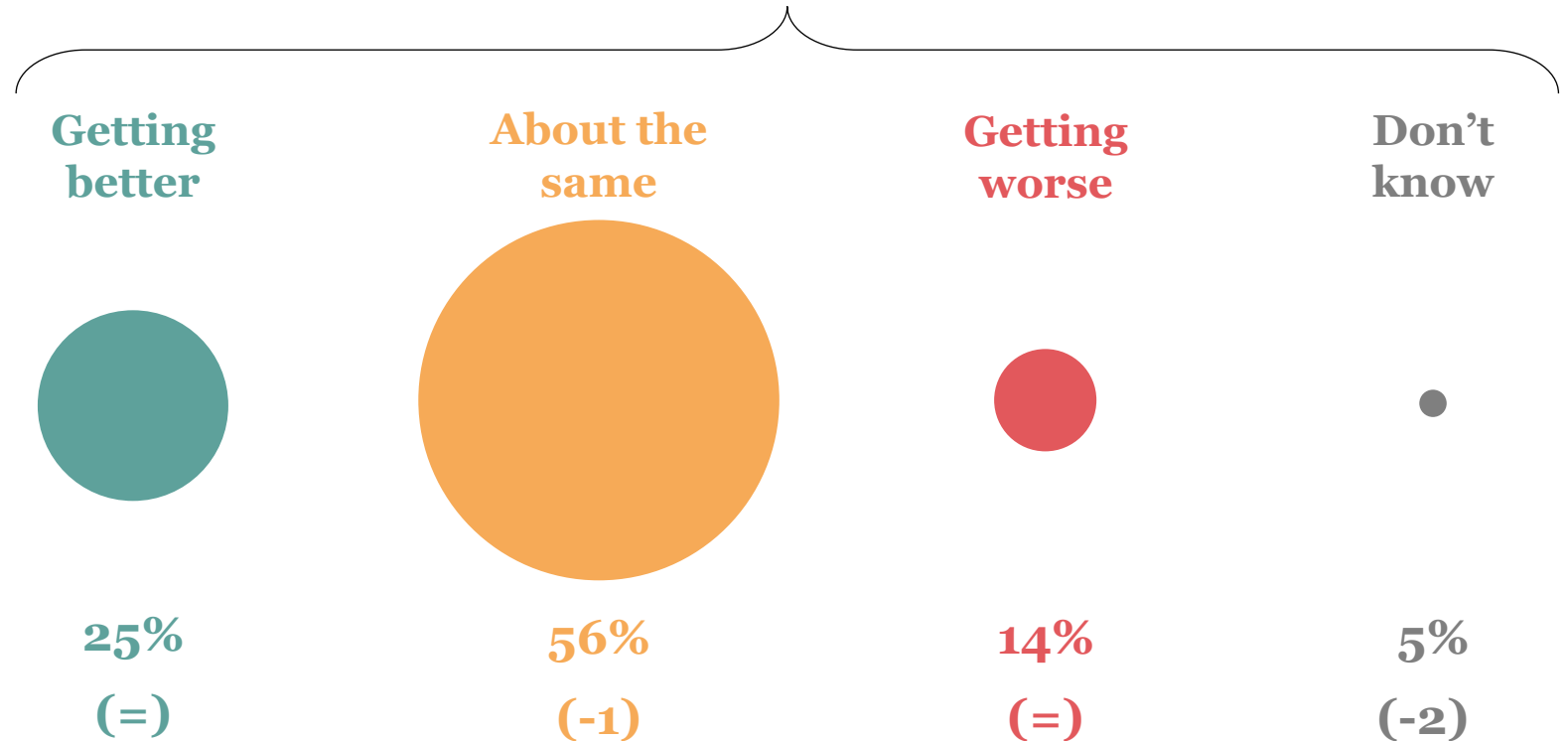


For over half of respondents, their experiences of flying over the last five years remain about the same

Over half (56%) of passengers say that their experience of flying is about the same as it has been over the past 5 years, relatively unchanged from November 2019. The proportions who say it is getting better (25%) or worse (14%) have remained the same compared to the previous wave.

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

All who have flown from a UK airport in the last 5 years



Travel disruption and complaint handling

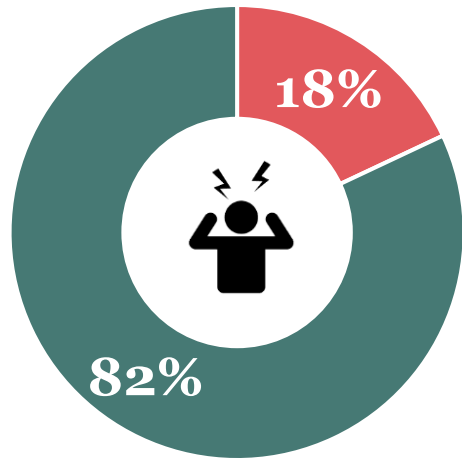
300 A340-600
A350-1000

Approaching one in five passengers found some aspect of their last flight stressful



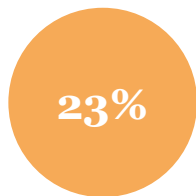
Found aspects of last flight stressful

Showing % who say the following



■ Yes ■ No

% Yes



Within last 12 months (pre-pandemic) Since the pandemic started

“No one had any idea what was happening. I asked numerous members of staff what was going on and they had no idea.”

“All the shops were closed. There was nothing to do so we were sitting idle. Also the departure area was closed so it was very stressful.”

“The airline abandoned us and left us stranded so we had to find hotels flights and it was expensive. We had to pay around £4000 extra to come home.”

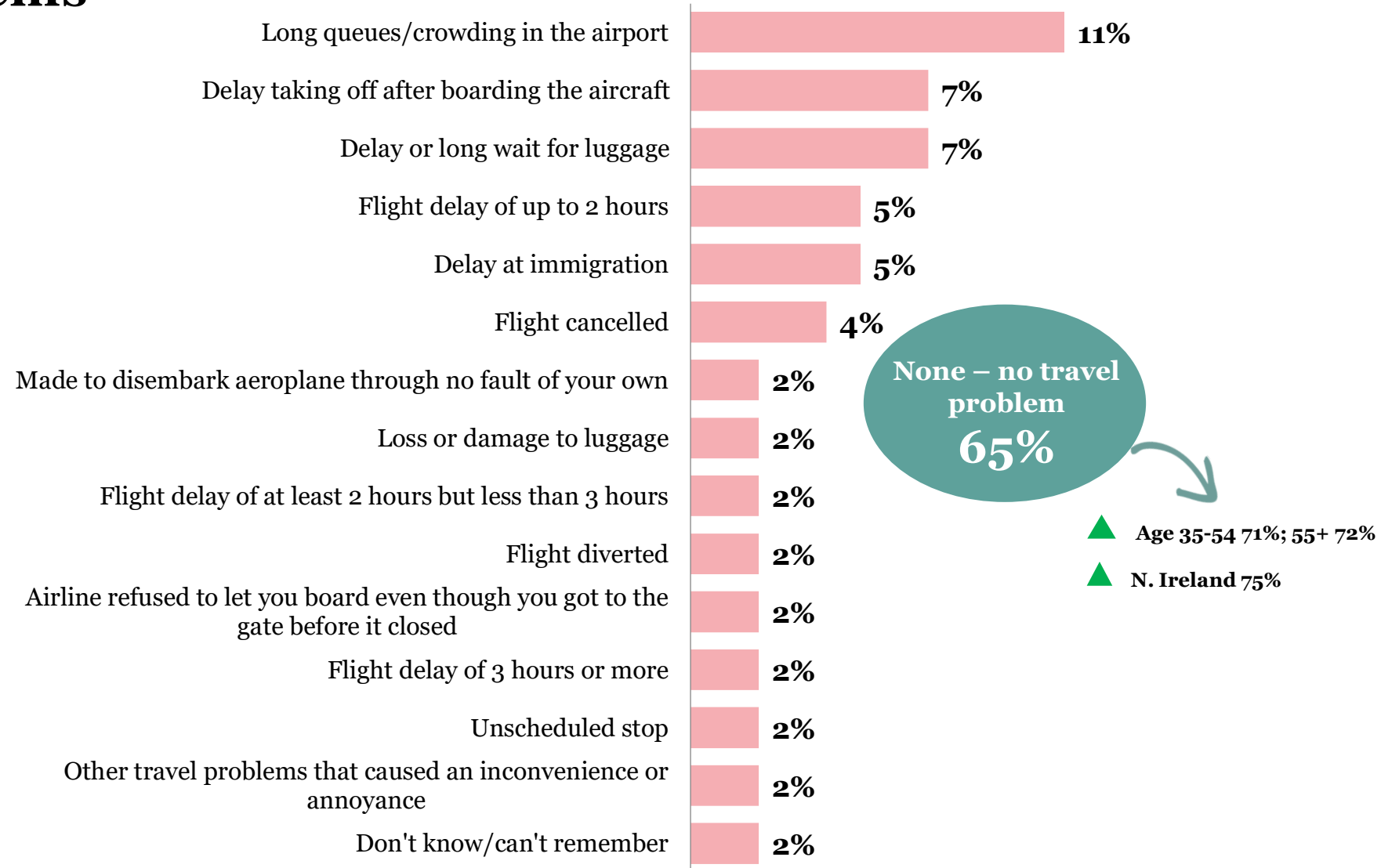
Approaching a quarter (23%) of those who have flown since the pandemic started say that there were aspects of their flights that they found stressful, this is 7 percentage points higher than those who flew in the months before the pandemic (16%).

Two thirds of passengers had no travel problems in their most recent flight

The proportion of passengers who say they had no travel problem has risen by 9 percentage points from 56% in Wave 8 to 65% this year. Long queues/crowding at the airport remains the largest issue for recent flyers, but ultimately is down from Wave 8 (17% to 11%). Three quarters (75%) of Northern Irish passengers say they had no travel problems.

Experience of recent flight issue(s)

All who have flown in the last 12 months



Three in five passengers say they were informed about the cause of travel issues, with their airline the most common source of this information

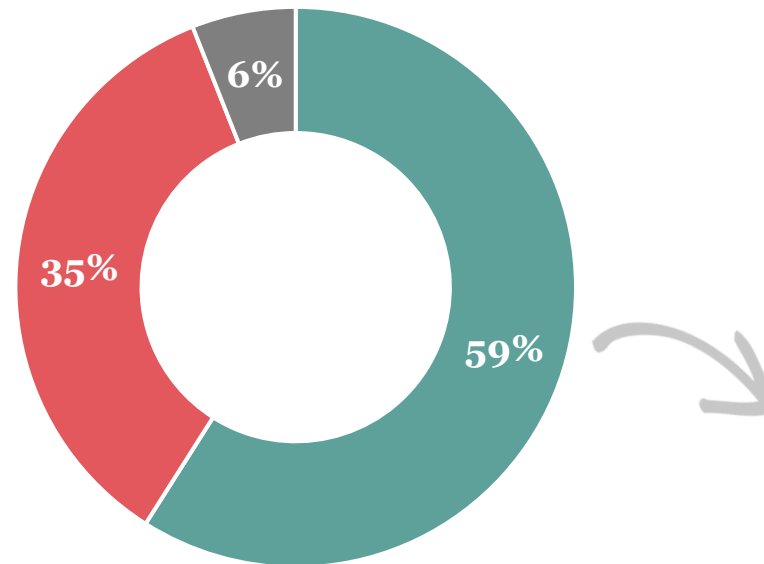
Three in five (59%) passengers who experienced issues say they received information on the cause of their travel issue when flying in the last 12 months. A third (35%) say they did not receive information, down 4 percentage points from Wave 8.

Of those who did receive information, approaching three in five (56%) say they received this information from the airline, while just under half (46%) say they received this information from the airport.

Receiving information on travel issues

Receiving information on the cause of the issue(s)

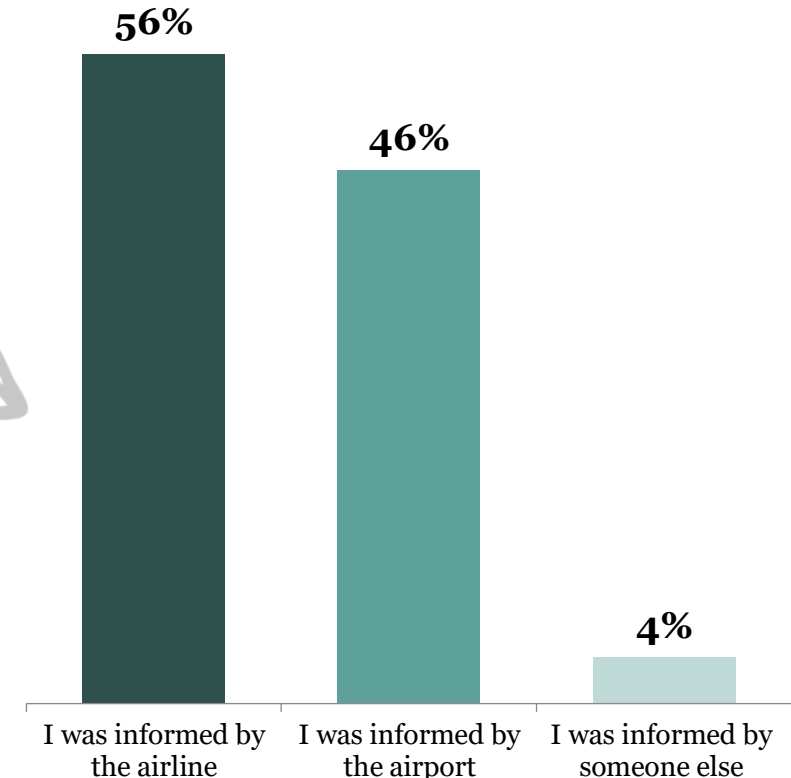
All who have flown in the last 12 months and experienced travel issue(s)



- NET: Informed
- No
- Don't know / can't remember

Source of information

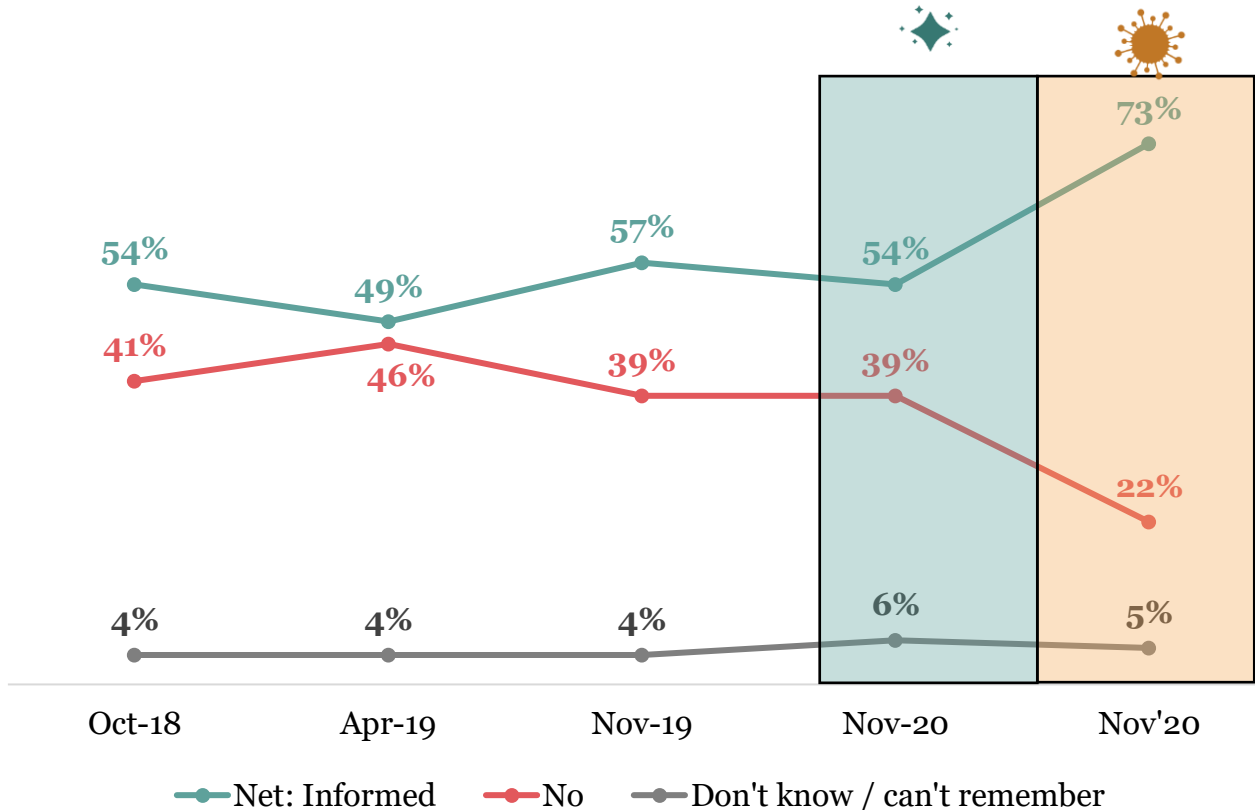
All who have flown in the last 12 months and experienced travel issue(s) and received information



The proportion of passengers who say that they were informed of the cause of their issue has risen significantly since before the pandemic

Receiving information on the cause of the issue(s)

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



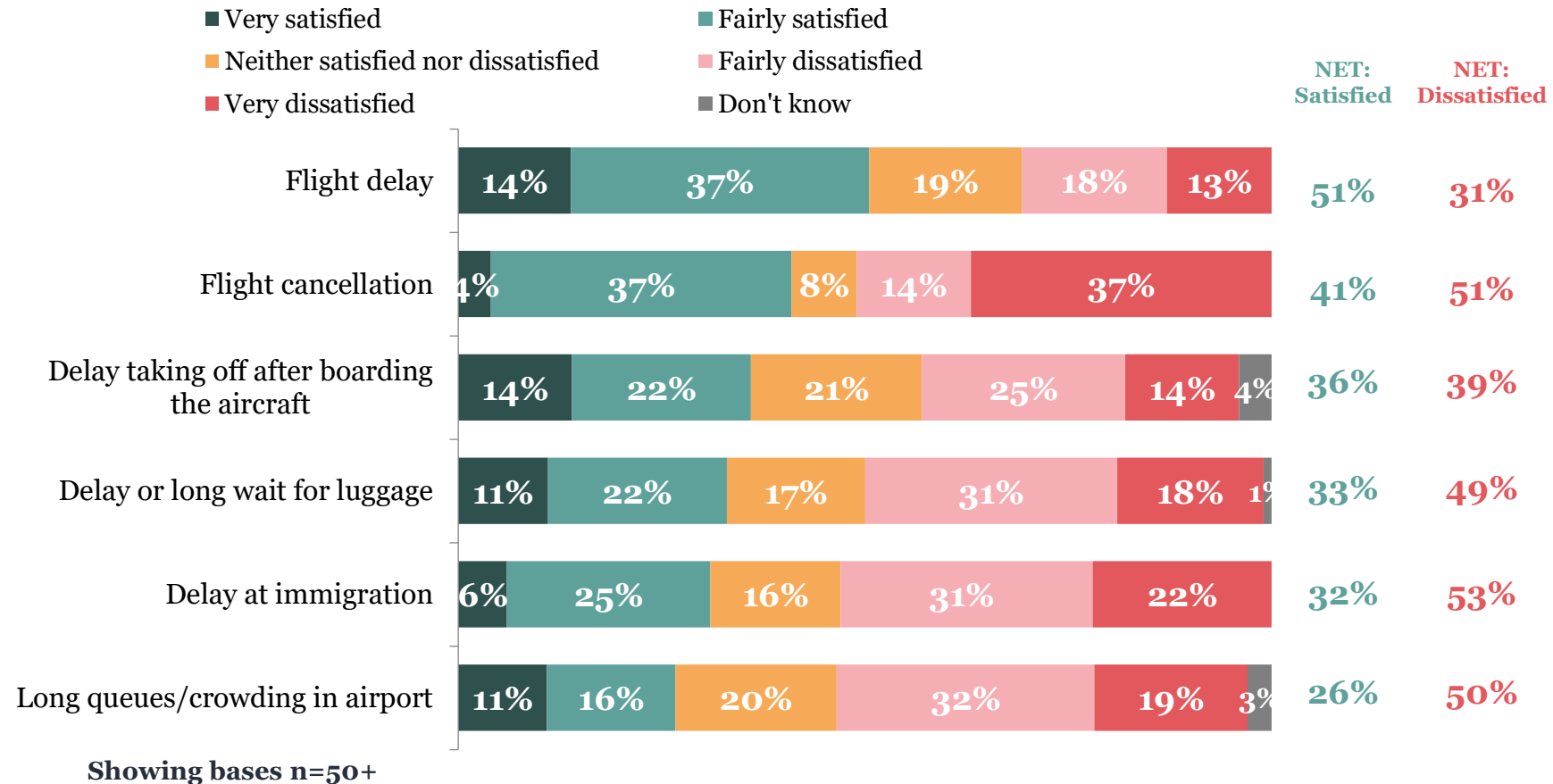
A majority of passengers who experience flight delays are satisfied with how the issue was handled

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

Half (51%) of passengers who had a flight delay say they were satisfied with how the issue was handled.

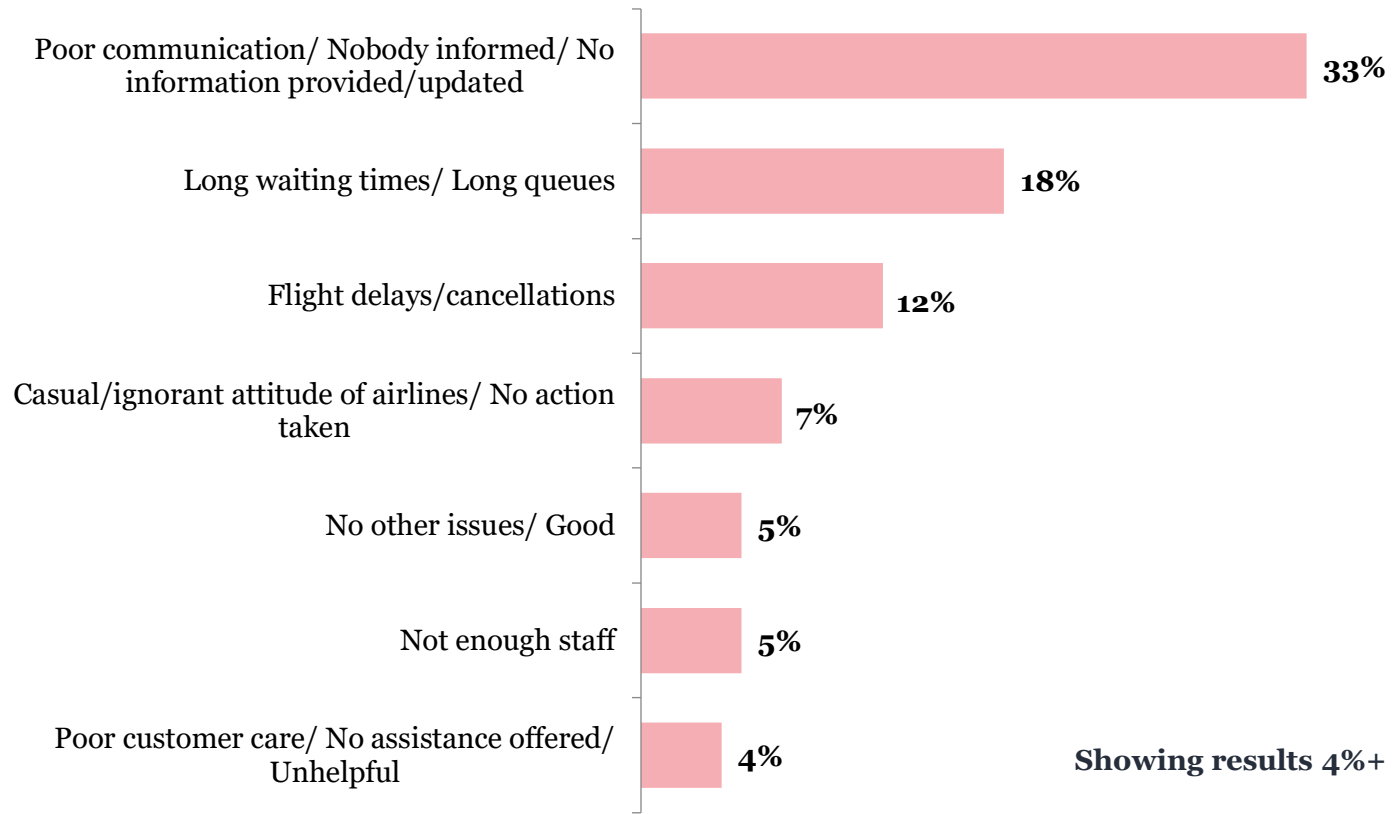
However, at least half were **dissatisfied** with how flight cancellations, delays at immigration and long queues and crowding in airports (51%, 53% and 50% respectively).



Poor communication and lack of information remains by far the biggest issue of dissatisfaction for passengers

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

A third (33%) of passengers say that poor communication is the reason for their dissatisfaction when dealing with a travel issue. This remains the top issue and has remained the top issue for the last three waves of the aviation tracker.



Q33. 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=195). N.B. Chart excludes code 'flight delays/cancellations'.

The majority of passengers who had experienced a travel problem were satisfied with measures taken in terms of their flight issues

Satisfaction with the different aspects of flight issue(s)

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

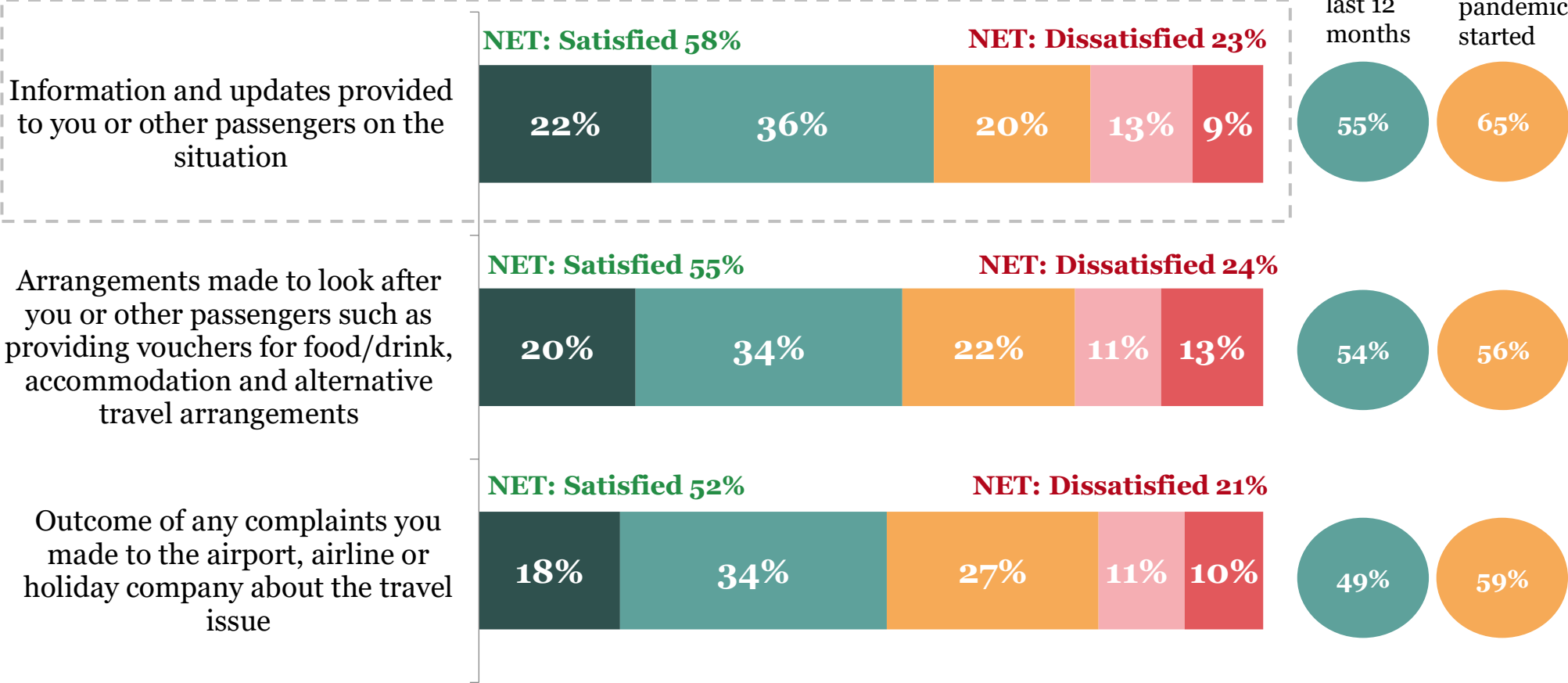
Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied

NET: Satisfied

Within last 12 months Since the pandemic started

Approaching three in five (58%) passengers who had travel problems were satisfied with the amount of information, up 4 percentage points from wave 8.

Satisfaction with arrangements made to look after them (49% to 55%) or the outcome of their complaints (47% to 52%) have both increased from Wave 8.



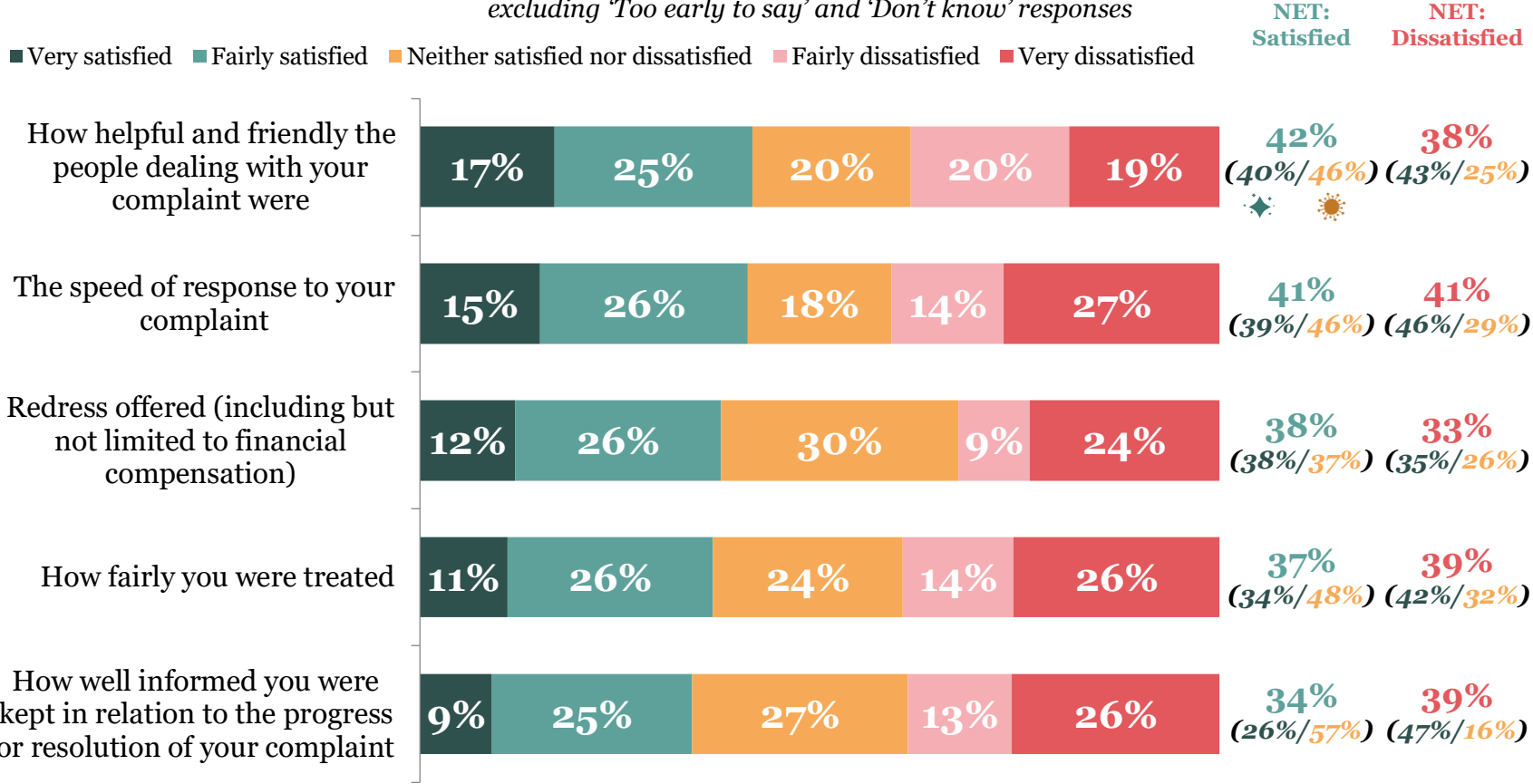
Passengers who made a complaint about a travel experience are more likely to be dissatisfied than satisfied with how fairly they were treated or how well informed they were kept

Just two in five respondents say they were satisfied with the helpfulness of people dealing with the complaints or the speed of response to the complaint (42% and 41% respectively).

Dissatisfaction with how complaints were handled has risen sharply in these complaint metrics since Wave 8, with how helpful and friendly the complaint handlers were and redress offered being the only metrics where respondents are more likely to be satisfied than dissatisfied. Respondents who have flown since the pandemic started are half as likely to be satisfied than those who flew in the months before.

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

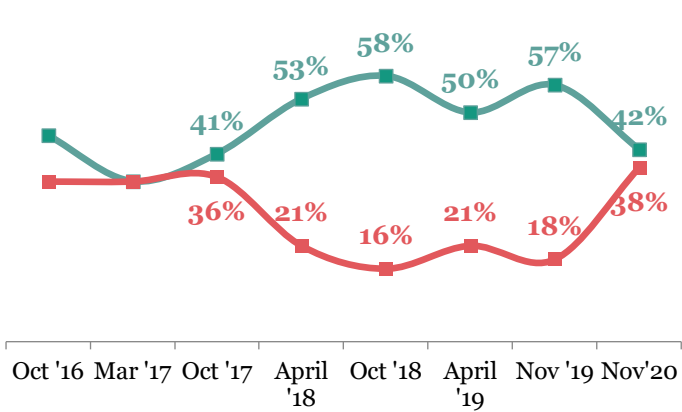


54 Q35. Thinking more specifically about any complaints you made to the airport, airline or holiday company about the travel issue, how satisfied or dissatisfied were you with each of the following aspects? Base: All who have flown in the last 12 months and made a complaint about a travel issue(s) excluding 'Too early to say' and 'Don't know' responses (n=102-106)

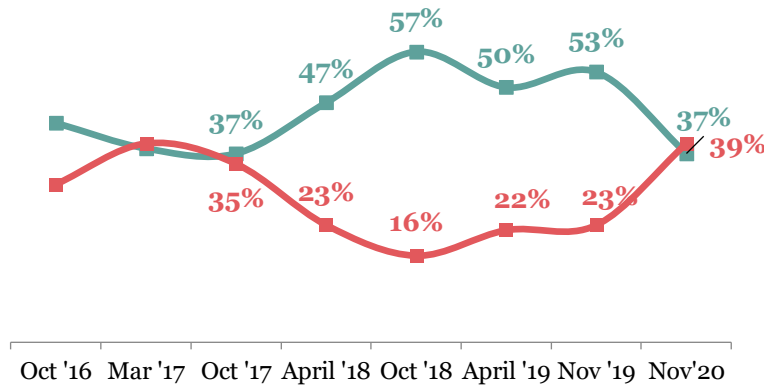
Dissatisfaction with complaint handling has risen across all metrics since November 2019

Satisfaction with complaint handling - Tracking

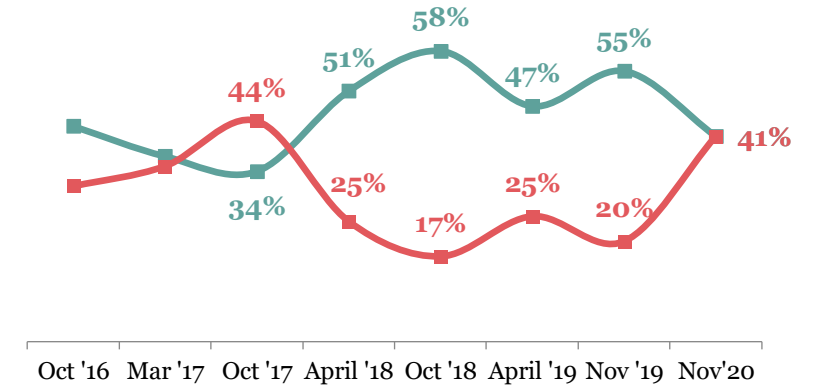
Helpfulness and friendliness of people dealing with complaint



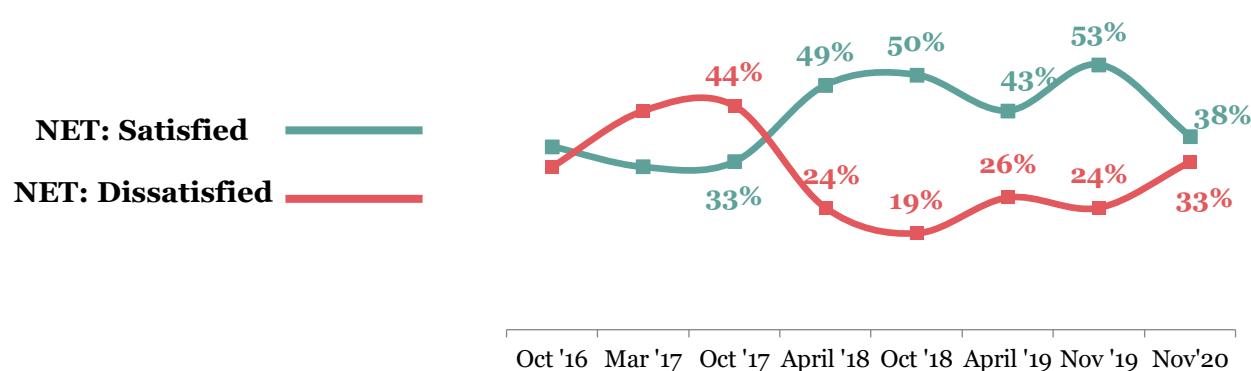
How fairly you were treated



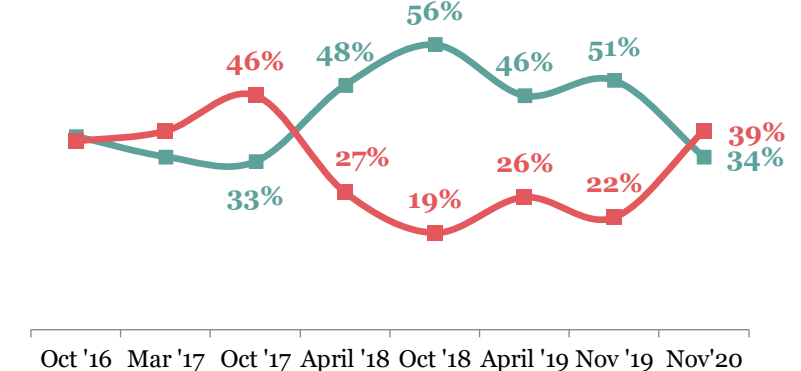
The speed of response to your complaint



Redress offered



Kept well informed about progress or resolution



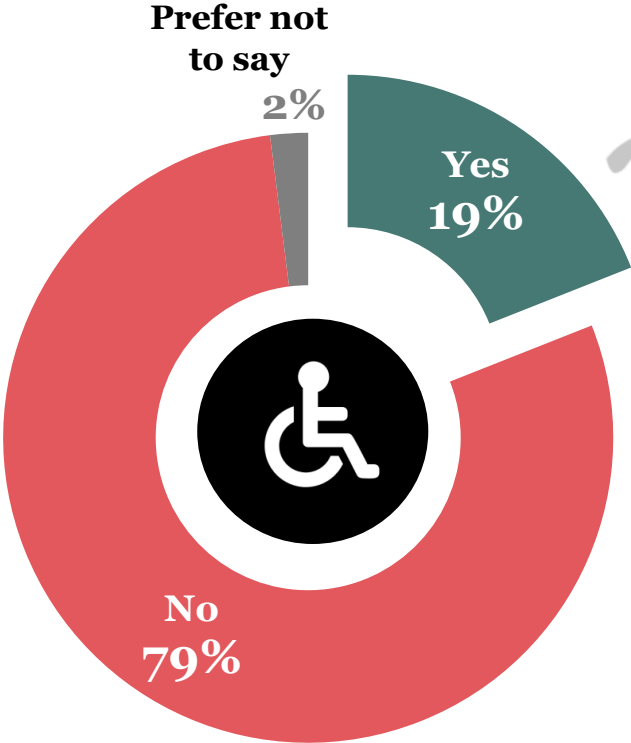
NET: Satisfied —
NET: Dissatisfied —

Accessibility and the experience of disabled passengers

Just under half of people flying with a disability or health condition find difficulty in accessing and using airports or flying

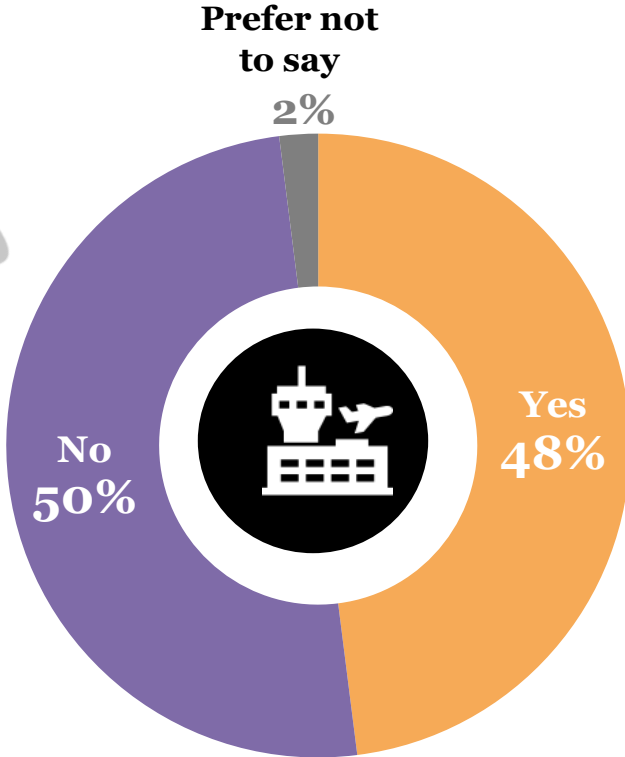
Disability/health condition

Showing % who have a disability

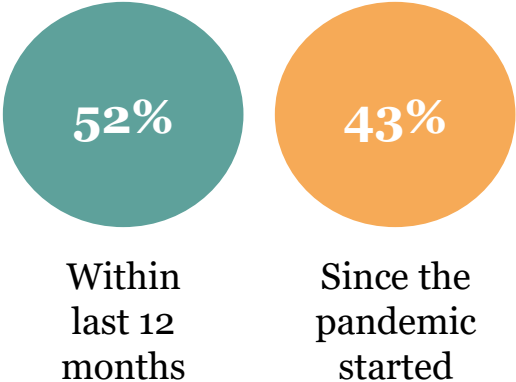


Difficulty in accessing/using airports or flying

All who have a disability



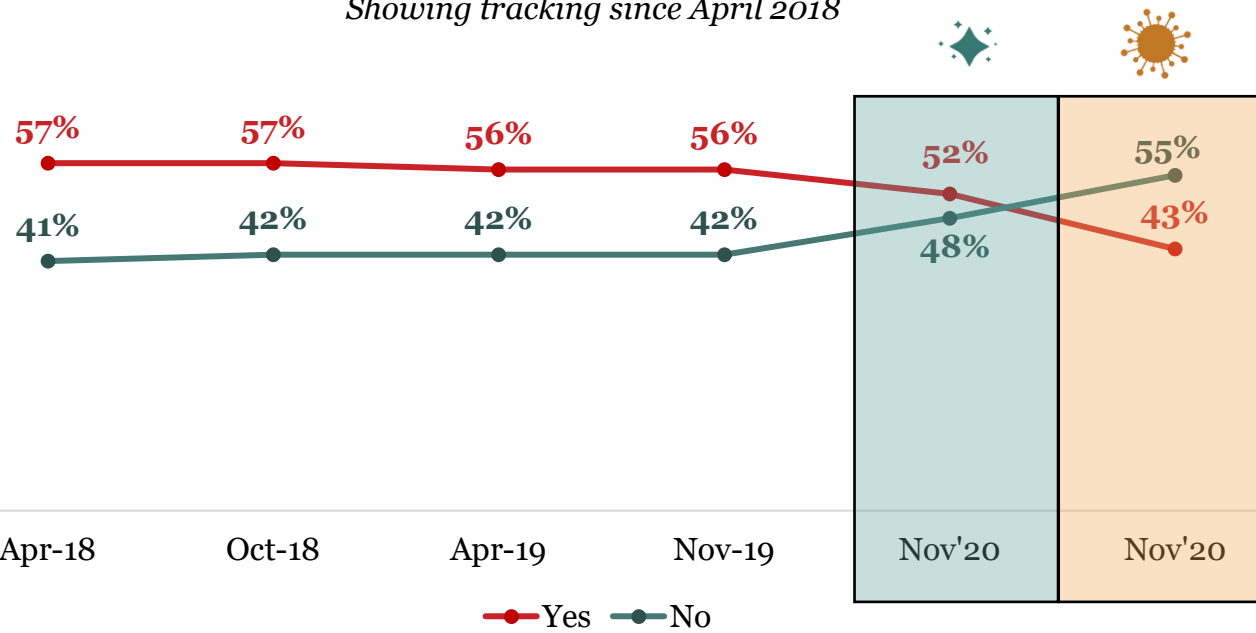
Difficulty in accessing/using airports or flying (% saying yes)



57 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=3504)
 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=661)

Since the pandemic, disabled respondents are less likely to have difficulty at airports or when flying

Difficulty in accessing/using airports or flying
Showing tracking since April 2018



For the first time since the aviation tracker began, disabled respondents are more likely to say they do not have difficulty in accessing or using airports or flying, than they are to have difficulties.

The proportion of respondents with a disability who say their disability makes accessing and/or using airports or flying difficult has dropped by 9 percentage points from 12 months ago (52%), to since the pandemic started (43%).

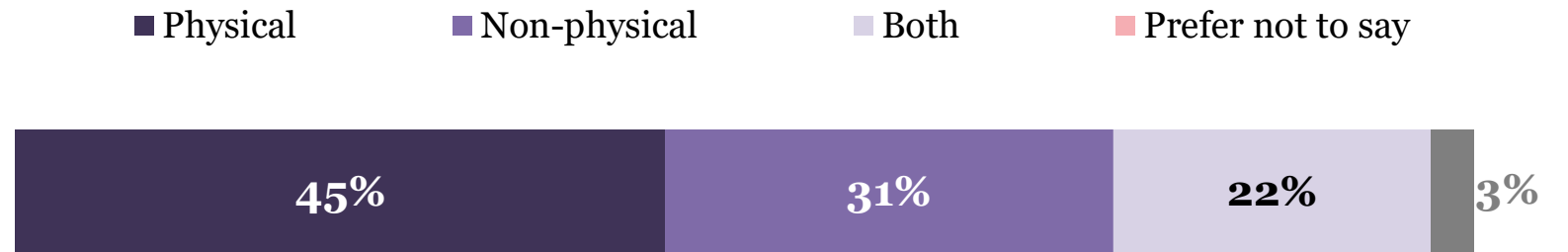
Over half of passengers with disabilities say that their disability is hidden

Approaching half (45%) of passengers with a disability say that their disability is a physical one, compared to three in ten (31%) who say that it is a non-physical disability.

Three quarters (76%) of respondents say that their disability is either hidden or both hidden and non-hidden, meaning that for many, their disabilities may not be easily recognisable at first by others.

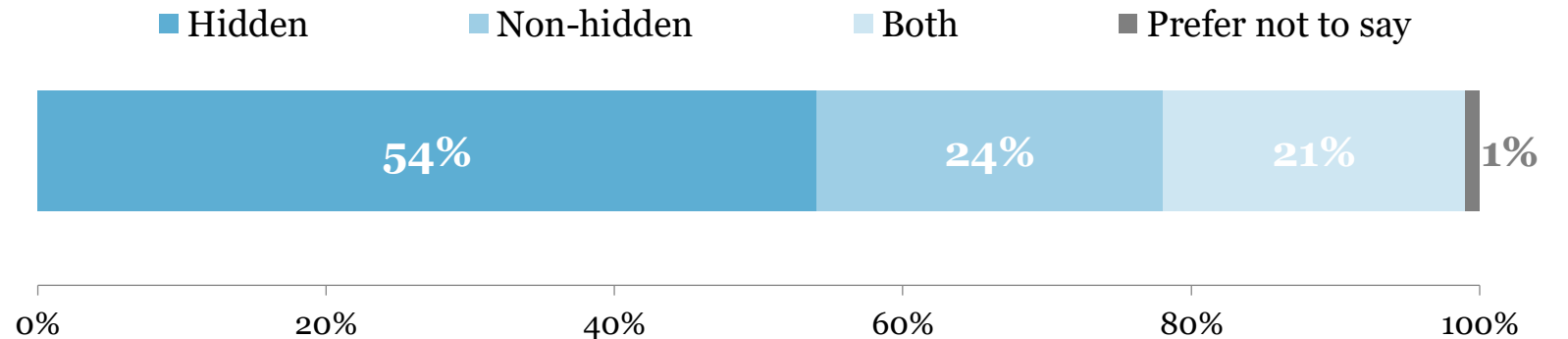
Physical or non-physical disability

All who have a disability (online only)



Hidden or non-hidden disability

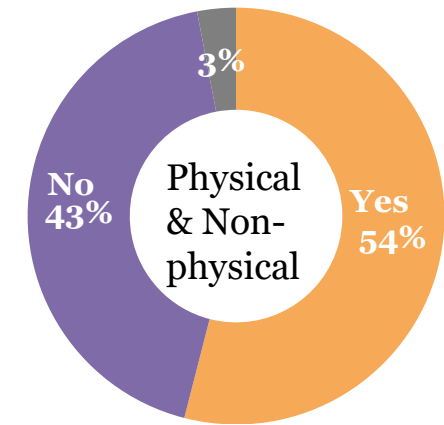
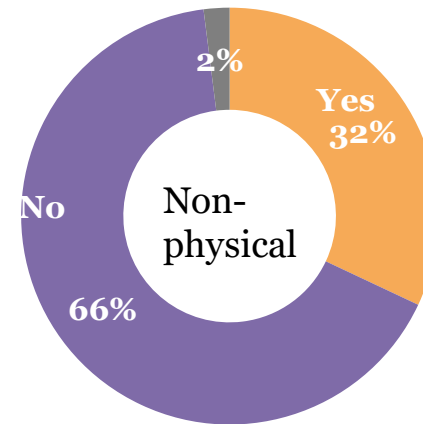
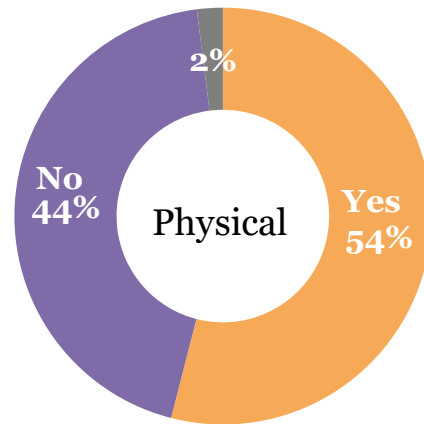
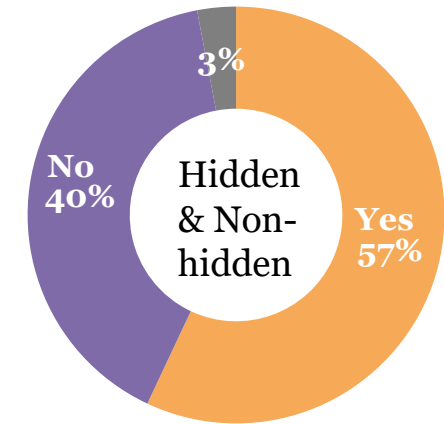
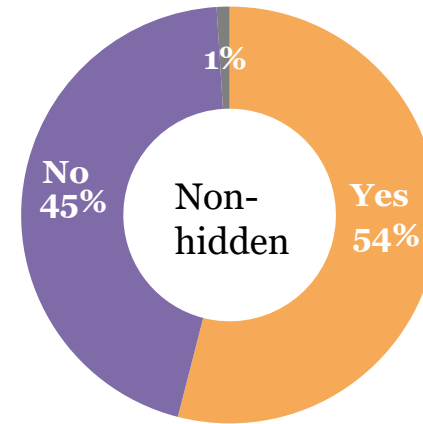
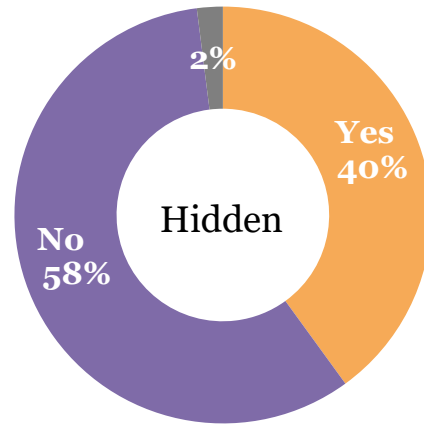
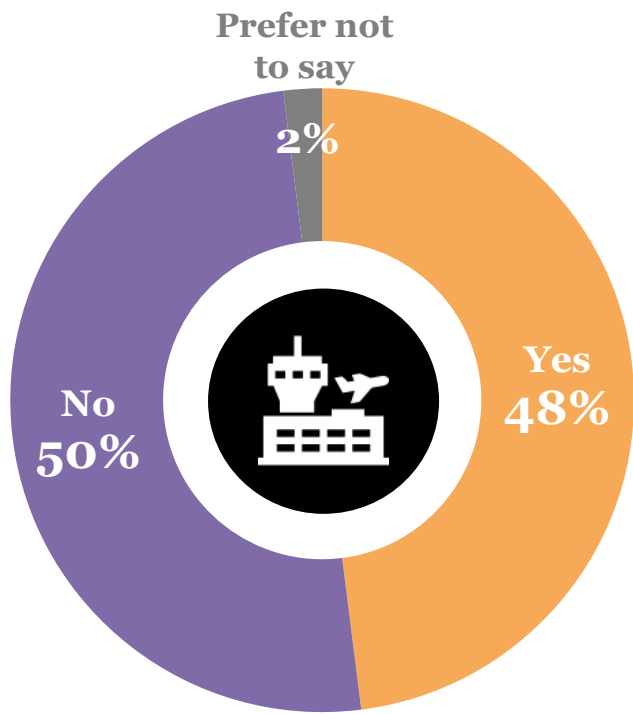
All who have a disability (online only)



Disabled passengers who have non-hidden or physical disabilities and health conditions are more likely to have difficulties in accessing or using airports or flying

Difficulty in accessing/using airports or flying

All who have a disability

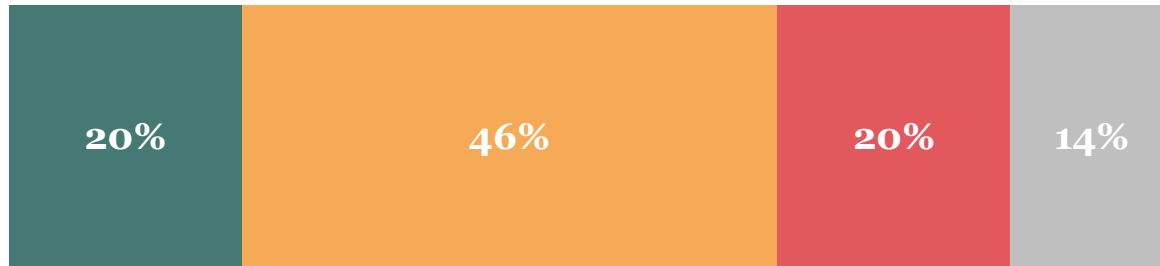


One in five disabled respondents say they expect to fly more in the next 12 months, the same proportion say they expect to fly less

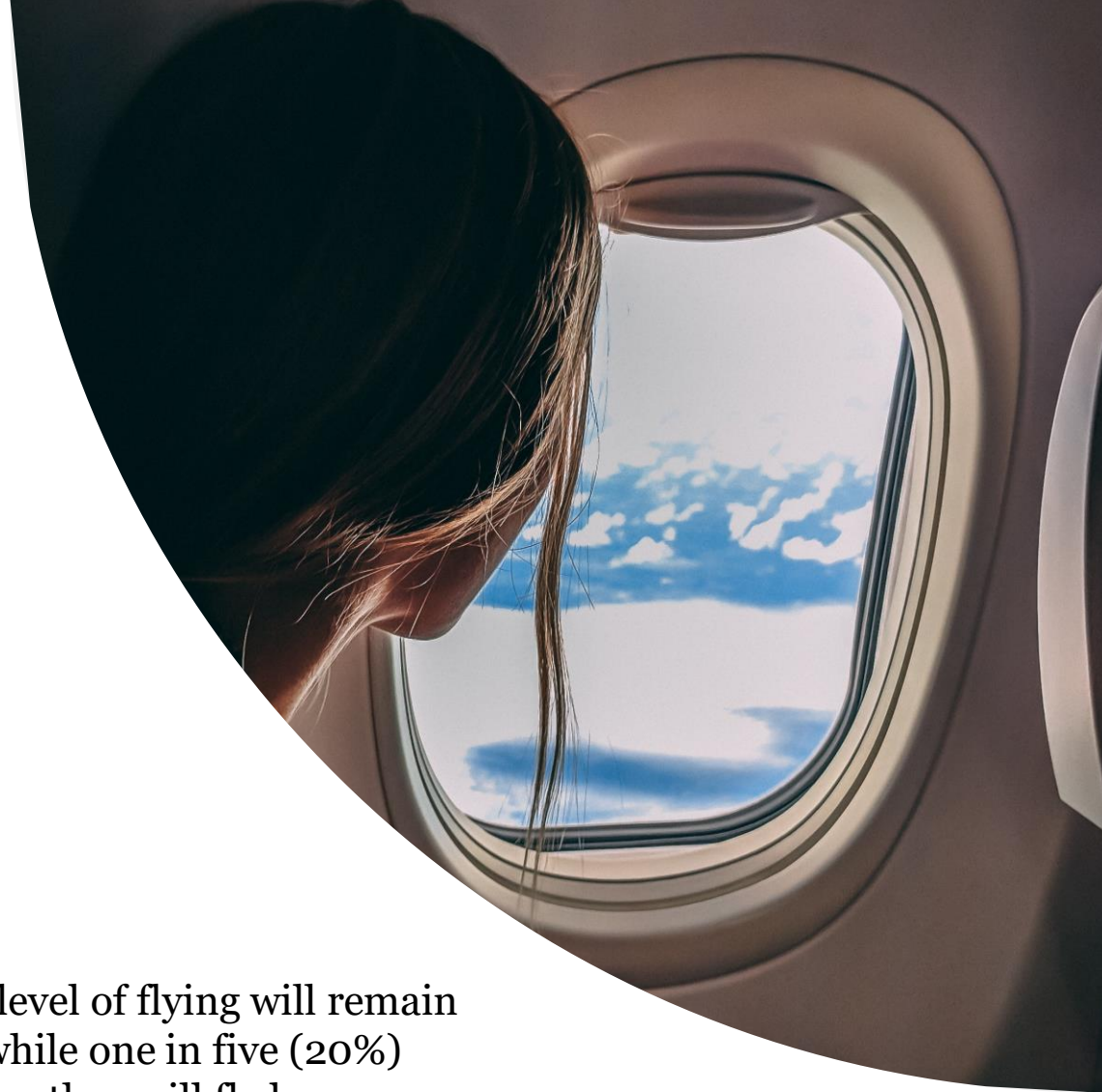
Expectations of flying compared to the last 12 months

All who have a disability

■ More ■ Same amount/ no change ■ Less ■ Don't know



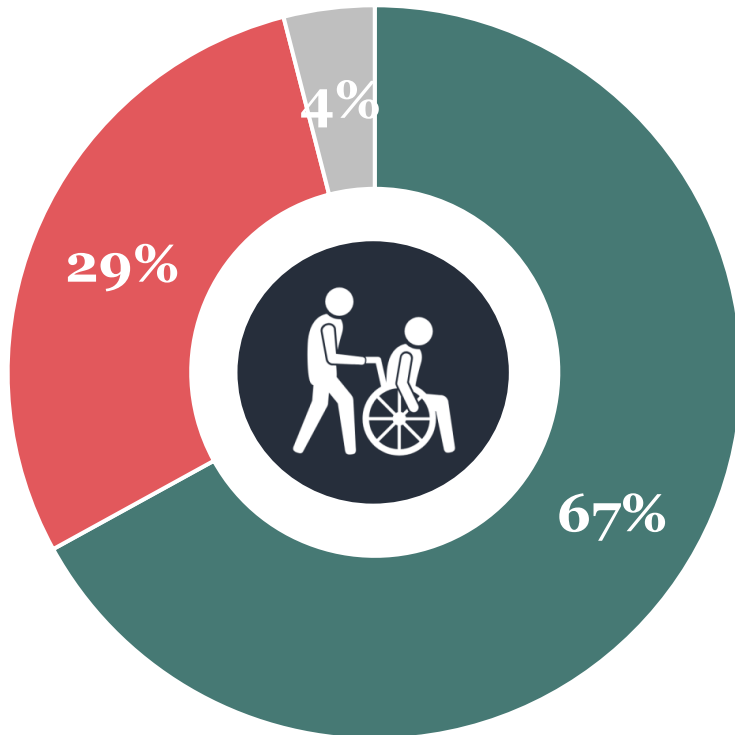
Approaching half (46%) of disabled respondents expect that their level of flying will remain the same in the next 12 months compared to the past 12 months, while one in five (20%) thinking they will fly more and the same proportion (20%) believing they will fly less.



Two thirds of disabled flyers who have a disability which makes accessing or using airports difficult think they would need specific assistance from the airport or airline when flying

Would assistance be required

Showing % who say the following

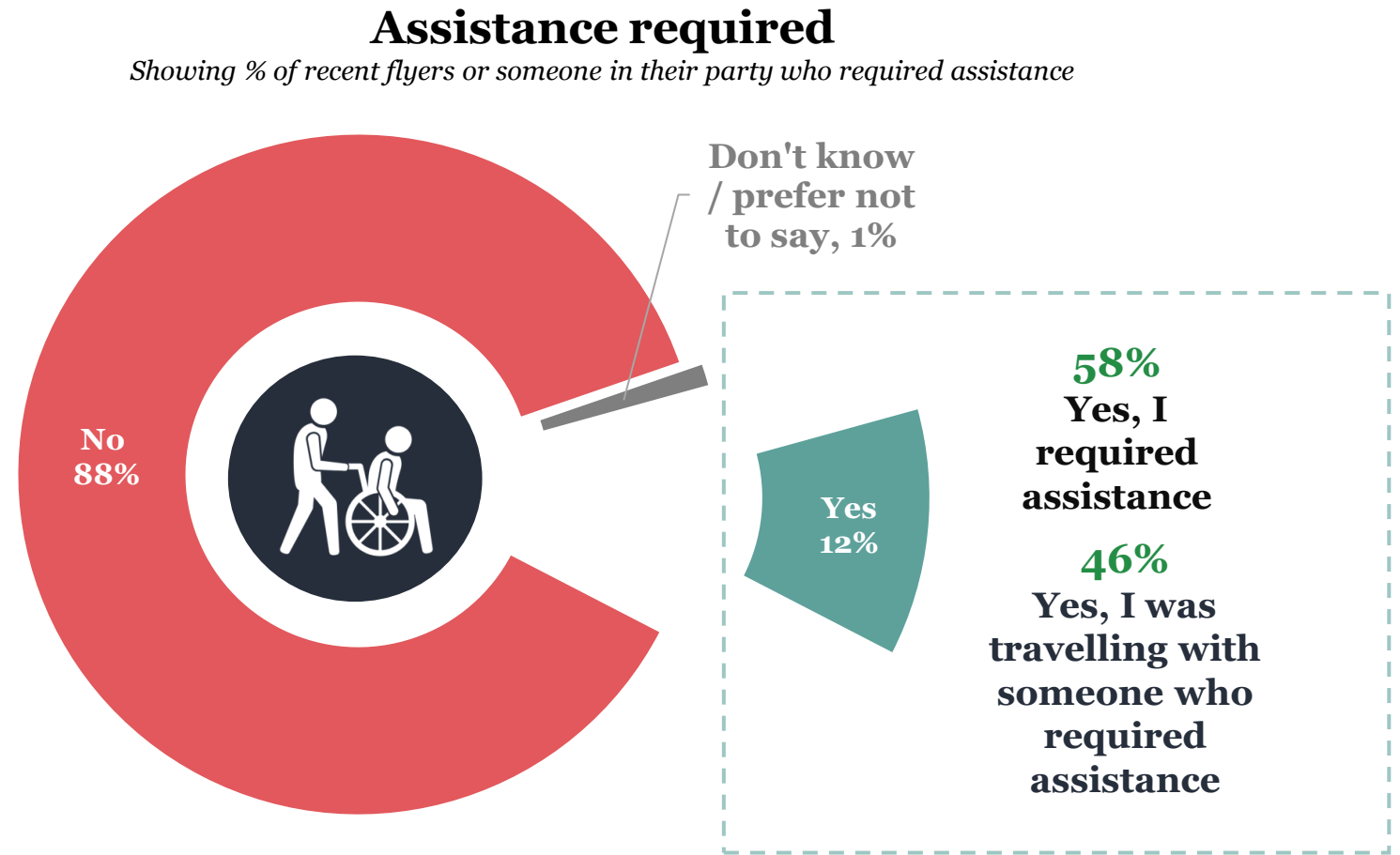


- Yes
- No
- Prefer not to say



Nine in ten recent flyers did not require special assistance on their most recent flight

Though the majority (88%) of flyers did not need any special assistance, of those where assistance was needed, approaching three in five (58%) needed assistance for themselves, while 46% needed assistance for someone they were travelling with. These figures are relatively unchanged from Wave 8.

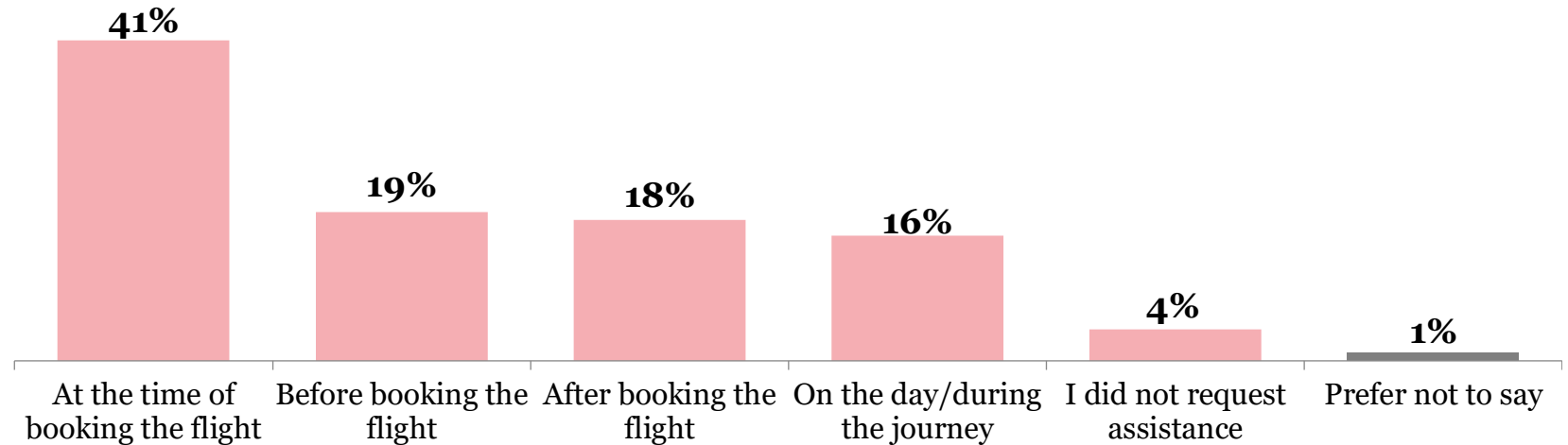


The point where the flight was being booked continues to be the most likely time where assistance is requested

Point during booking process when assistance was requested

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

Two in five (41%) respondents say they requested assistance at the time of booking the flight. A similar proportion needed assistance before booking the flight and after booking the flight (19% and 18% respectively).



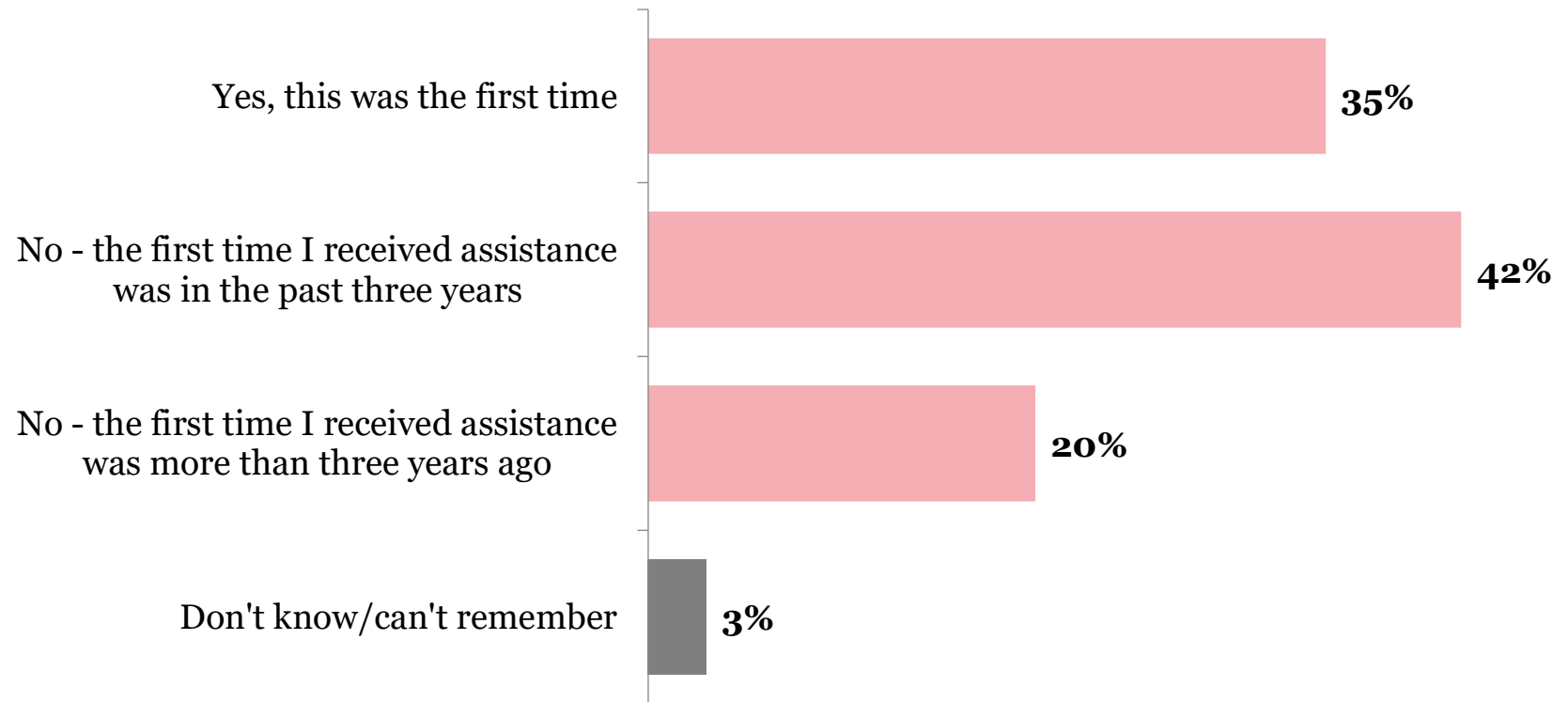
For a third of those who had flown and needed assistance, their most recent flight was the first time that they had requested assistance

A third (35%) of those who had flown from a UK airport and needed assistance said that that experience was their first time, dropping 12 percentage points from the 47% recorded in Wave 8.

Two in five (42%) say that they had received assistance for the first time in the last three years, while one in five (20%) say they received assistance for the first time more than three years ago.

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

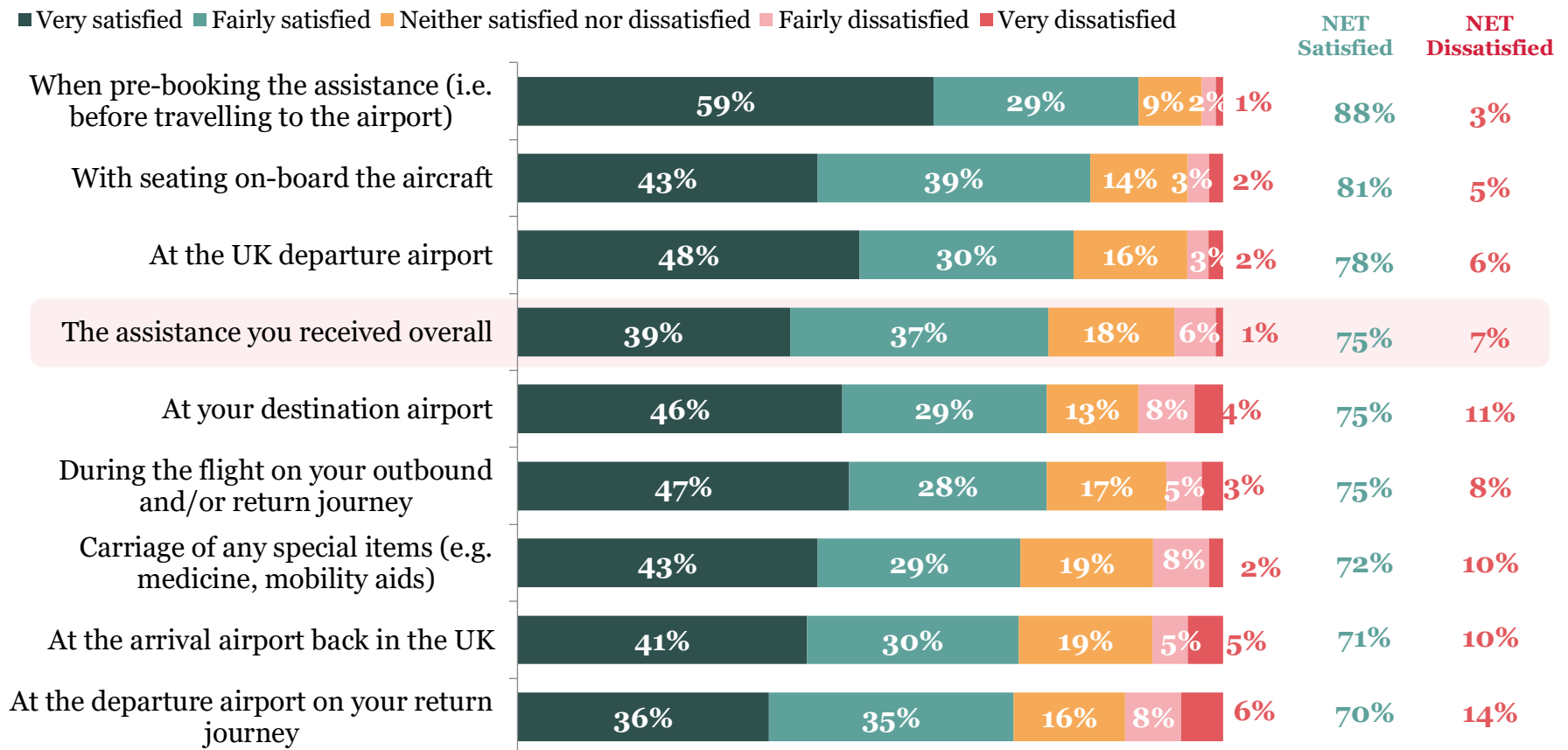


Three quarters of passengers who have received assistance are satisfied with the overall assistance received

Satisfaction with the services received at each point of the journey

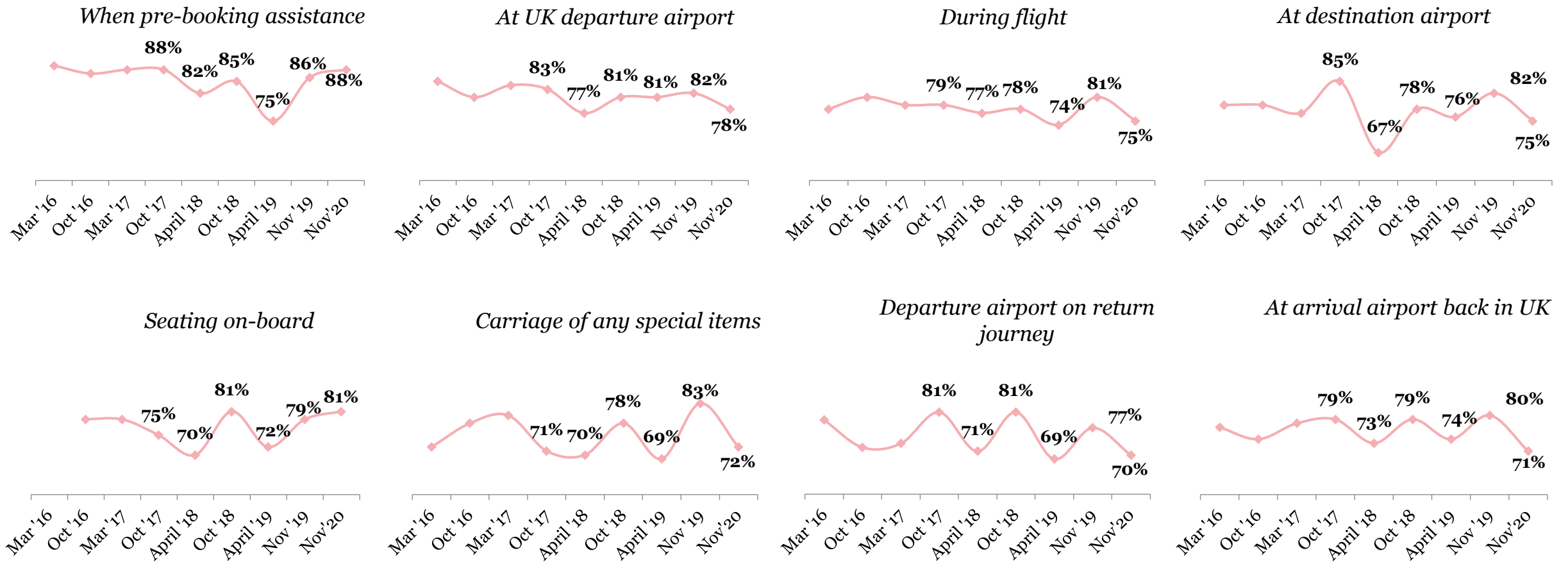
All who have flown in the last 12 months and received assistance for their last journey, excluding 'Don't know' and 'Not applicable' responses

Recent flyers have good satisfaction scores and low dissatisfaction for a variety of elements in their flight experience, where assistance has been needed, with nearly nine in ten (88%) being satisfied when pre-booking assistance and four in five (81%) satisfied with seating on-board the aircraft.



Satisfaction levels have decreased in most metrics compared to the previous wave. The exceptions are in pre-booking assistance and seating on-board the plane

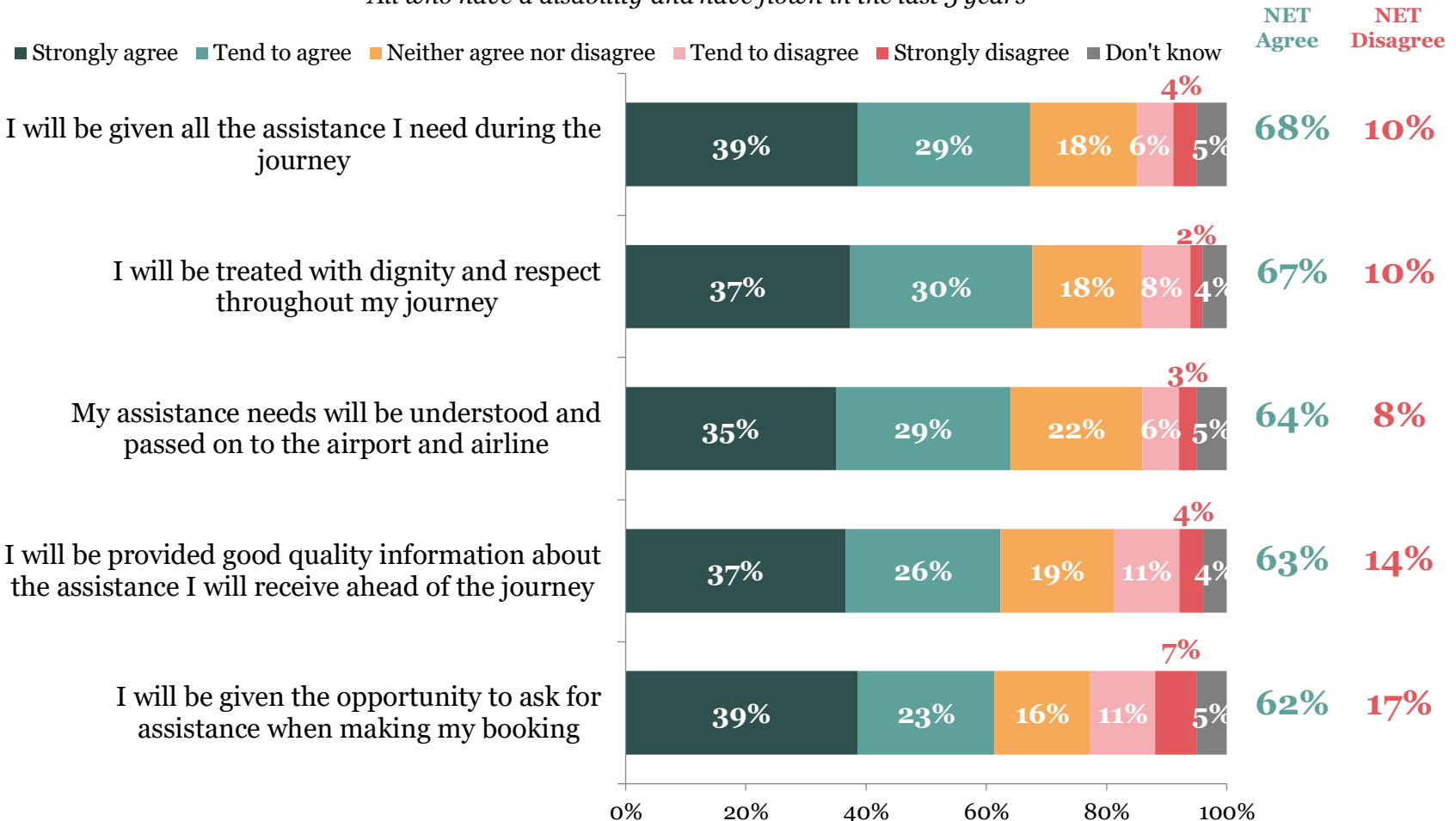
Satisfaction with the services received at each point in the journey – Tracking % Satisfied (NET)



At least three in five disabled passengers have positive expectations of how their flying needs will be dealt with

Expectations among disabled passengers for service when flying

All who have a disability and have flown in the last 5 years



Two thirds (68%) of disabled passengers who have flown in the last 5 years agree with the statement that they will be given all the assistance they need during the journey.

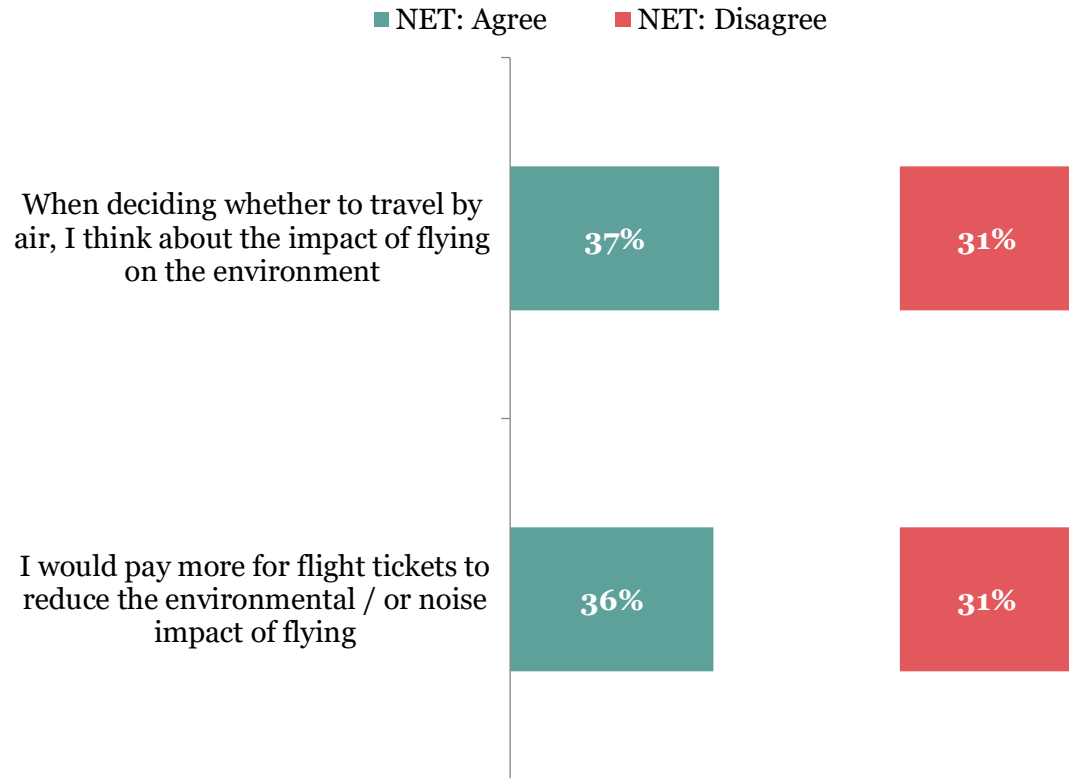
Though it records the lowest net agreement score, two in five (39%) disabled passengers still strongly agree that they will be given the opportunity to ask for assistance when making their booking.

Aviation and the Environment

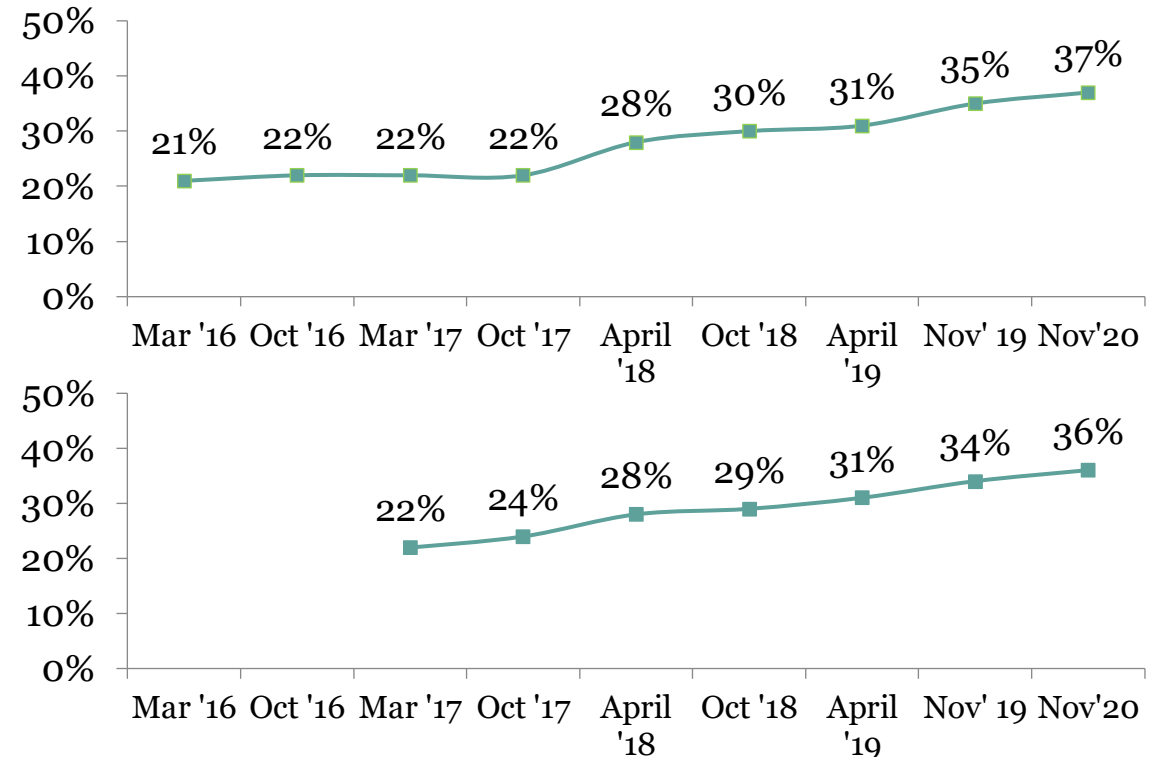
UK adults are more likely than ever before to say they think about the environmental impact when travelling by air, or that they would pay more to reduce the environmental impact of flying

Environmental attitudes

All respondents



Environmental attitudes – NET: Agree over time

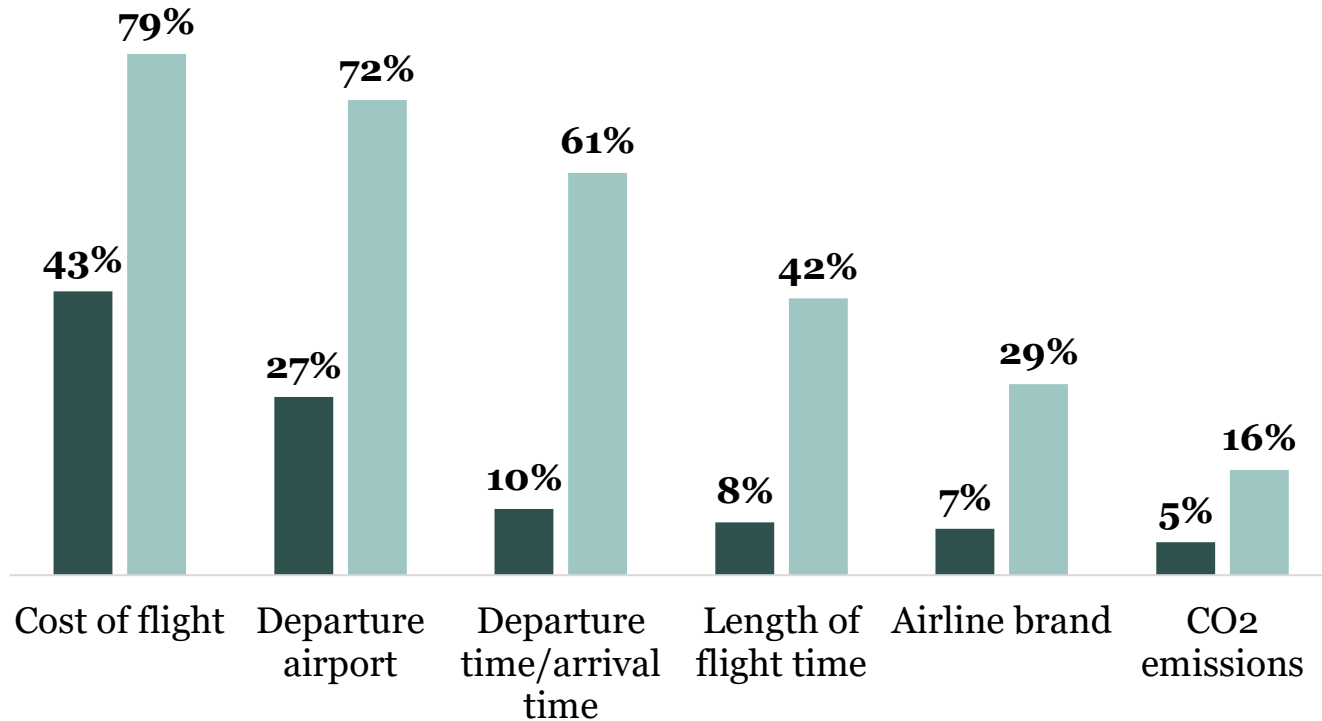


Cost of flight is the most important factor for many when choosing which flight to book, while just one in six rank CO2 emissions in their top 3 factors

Importance when choosing a flight to book

Showing Top and Top 3 ranks

■ Top 1 ■ Top 3



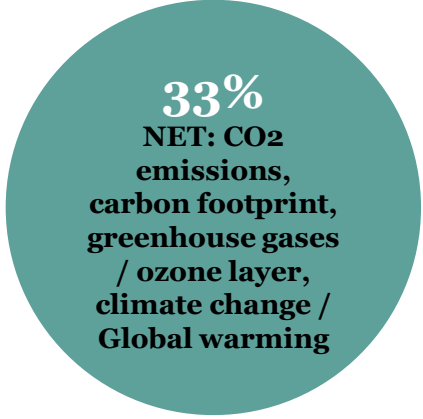
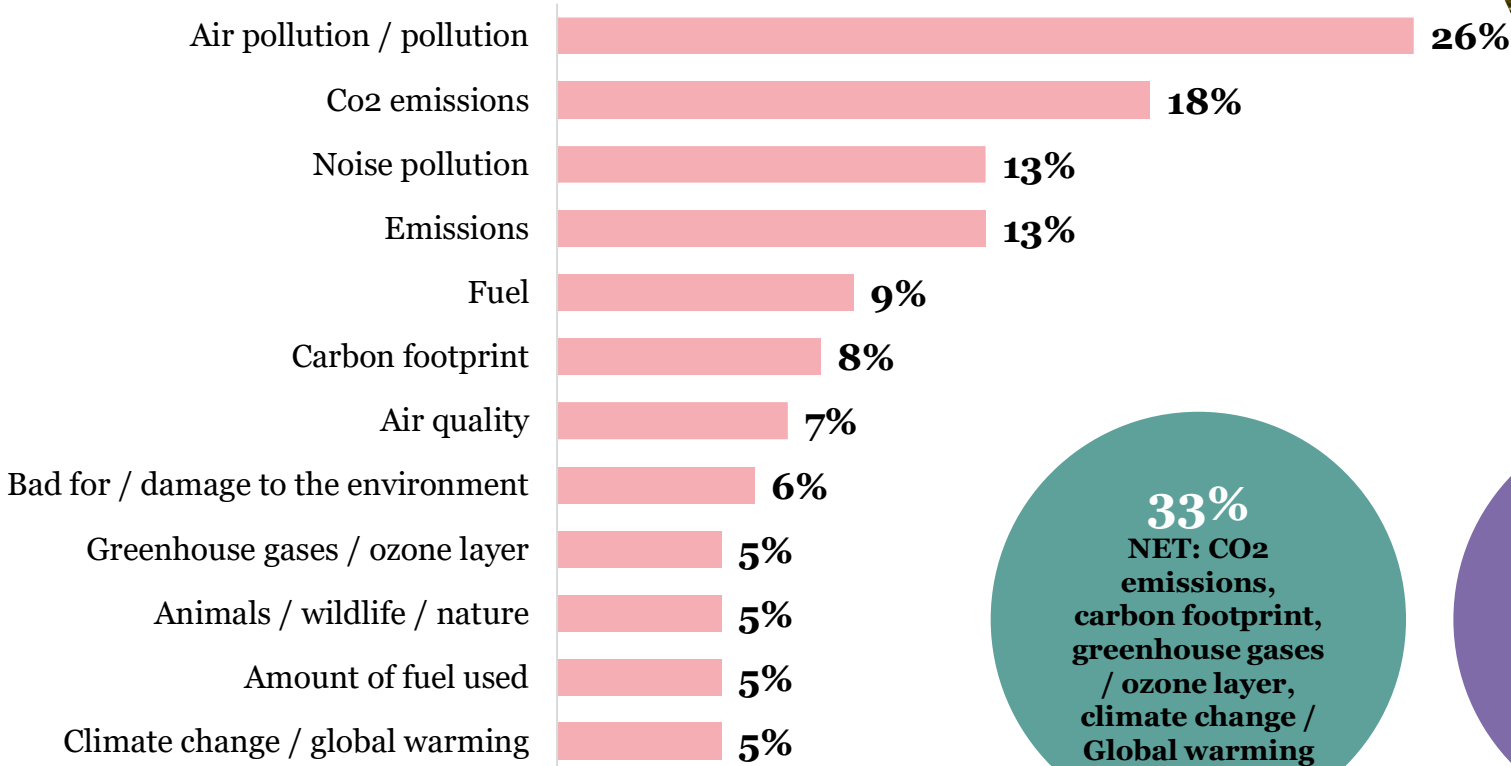
Four in five (79%) respondents rank cost of flight in their top three, with two in five (43%) placing it as their top factor when choosing a flight to book.

Just one in twenty (5%) say CO2 emissions are their top ranked factor, with one in six (16%) placing it in their top 3. However a quarter (27%) of those aged 18-34 place CO2 emissions in their top 3 ranked factors.

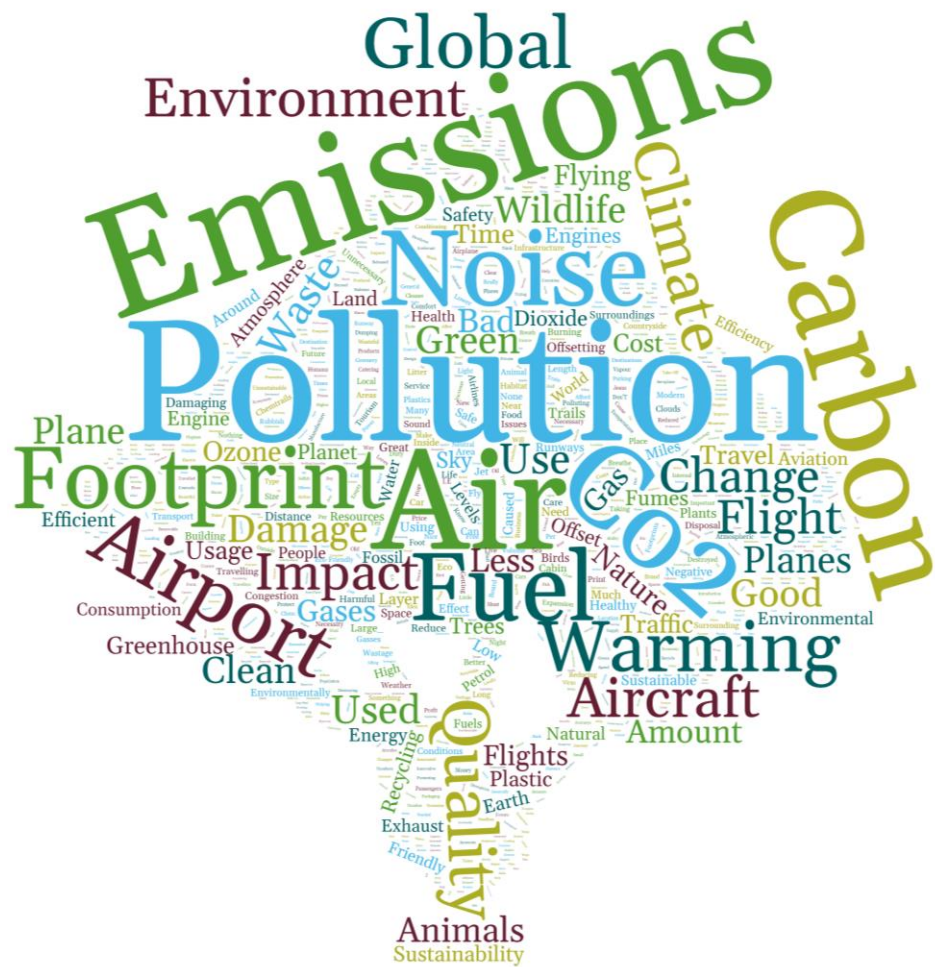
A quarter of respondents say the first thing they think of when they think of “environment” in the context of aviation is air pollution/pollution

Associations with environment in aviation

Showing responses mentioned in at least 5% of responses



Thoughts on the environment in the context of aviation highlight the prominence of negative effects



Many respondents think about the negative effects of aviation on the environment, with outputs such as emissions, pollution, carbon and noise taking centre stage.

By contrast, associations with efforts made to tackle these effects are not at the forefront. This highlights low levels of awareness among the public about what measures aviation is taking in the context of the environment.

Verbatim comments on ‘environment’ in the context of aviation

1 - Air pollution / pollution	2 - CO2 emissions	=3 - Noise pollution	5 - Fuel*
<p>“Pollution due to large number of vehicle movements in the area of the airport”</p> <p>“Air pollution from aircraft”</p> <p>“Atmospheric pollution”</p>	<p>“CO2 released into the atmosphere”</p> <p>“Offsetting CO2 emissions”</p> <p>“Carbon footprint of aircraft”</p> <p>“Reducing carbon emissions”</p>	<p>“Noise around the vicinity of the airport from jets”</p> <p>“Noise pollution”</p> <p>“Noise of old plane engines”</p>	<p>“Fuel jettison”</p> <p>“Fuel use whilst idling on stands and awaiting take-off”</p> <p>“Fuel used and impact on environment to produce that fuel”</p>

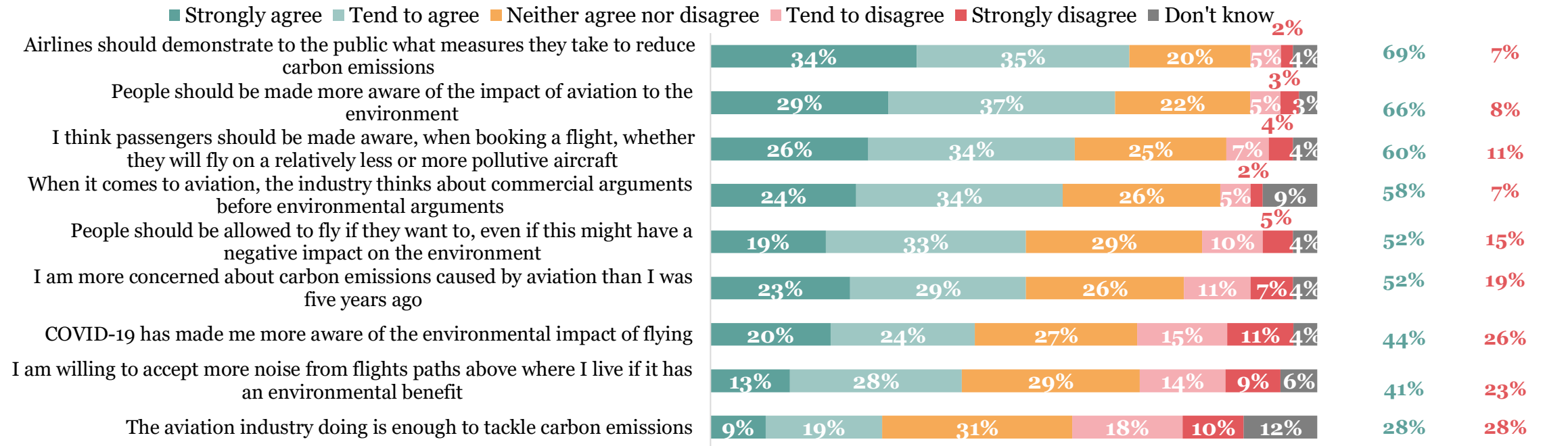
*Verbatim responses for those coded as answering ‘emissions’ (the joint 3rd highest answer) are not shown, as the vast majority of these respondents simply wrote ‘emissions’ as their answer.

Comments on CO2 emissions covered a range of topics, including general mentions of CO2 emissions as well as positive efforts by the aviation industry to combat these. Comments relating to noise pollution and fuel were almost entirely around their negative effects.

The majority of respondents want more environmental information, and to be shown by the airlines what they are doing to reduce aviation carbon emissions

Agreement with Environmental statements

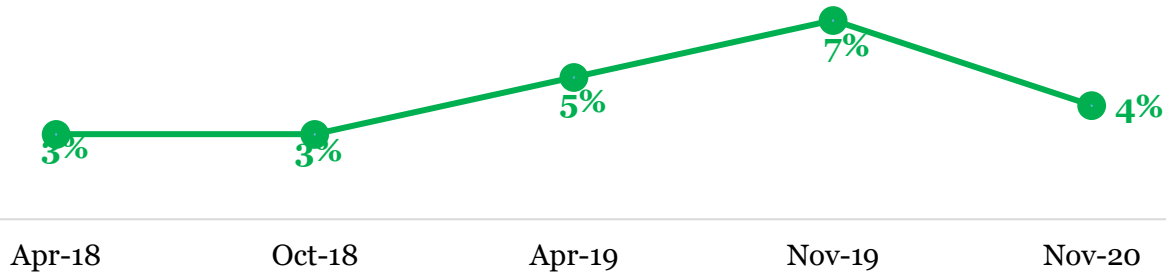
Showing % who agree with the following



Respondents are divided on whether the aviation industry is doing enough to tackle carbon emissions, with the same proportion agreeing and disagreeing (28%). UK adults appear to want more information on this, with seven in ten (69%) agreeing that airlines should demonstrate what measures they are taking and two thirds (66%) agreeing that people should be made more aware of the impact of aviation to the environment. A majority (52%) of respondents say they are more concerned about carbon emissions caused by aviation than they were 5 years ago.

The proportion of passengers not flying due to environmental concerns has dropped slightly since November 2019

Showing % of those who have not flown in the last 12 months because of concerns about the environment/carbon footprint



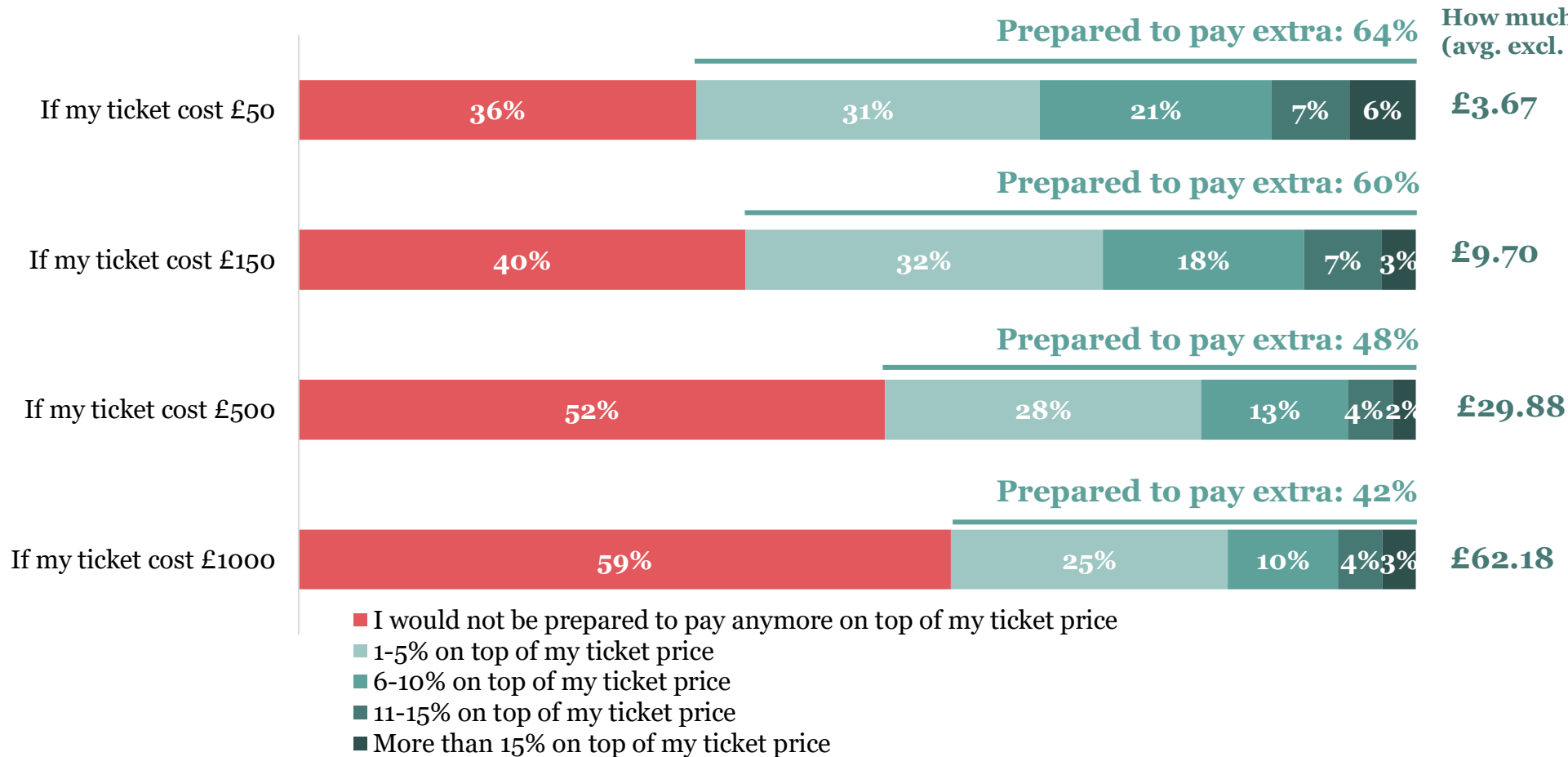
In wave 8 of the aviation tracker, 7% of respondents who had not flown in recent memory did so because of the environment or carbon footprint concerns. This figure has dropped since then, with this slight decrease potentially being attributable to the manifestation of fears about COVID-19, and the limitations placed on the public meaning many could not fly at all.



For tickets that cost up to £500, almost half say they would be willing to pay extra on top of their ticket price if a charge was levied to help tackle the environmental impact of flying

Willingness to pay extra to tackle climate change

Showing % who say the following



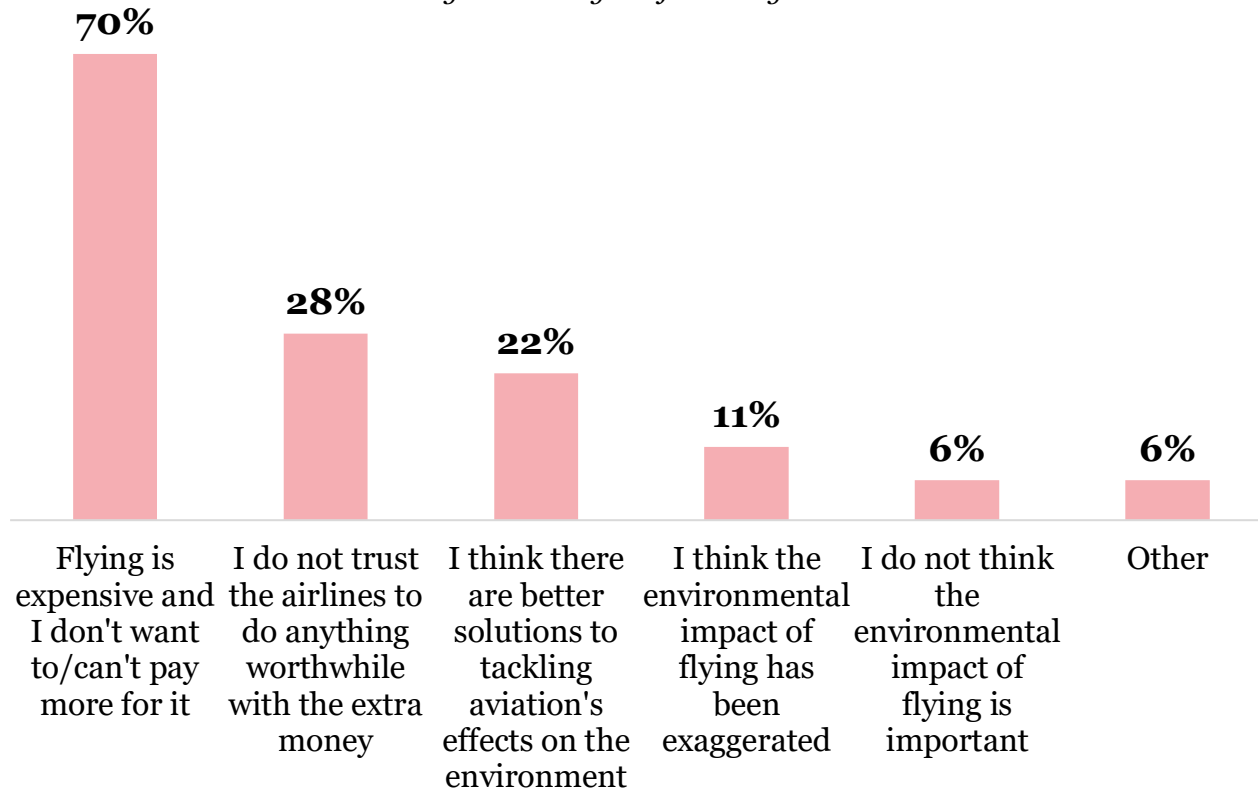
How much more?
(avg. excl. zero)

Two thirds (64%) of respondents say they would be willing to pay extra on top of their standard ticket price to help tackle the environmental impact of aviation if the ticket costs £50 or less. This proportion decreases to 42% if the ticket were to cost £1000 or more.

Of those who would not be willing to pay extra to fly, the main reason is that they consider flying to already be expensive and can't afford to pay extra

Reasons to not pay environmental levy

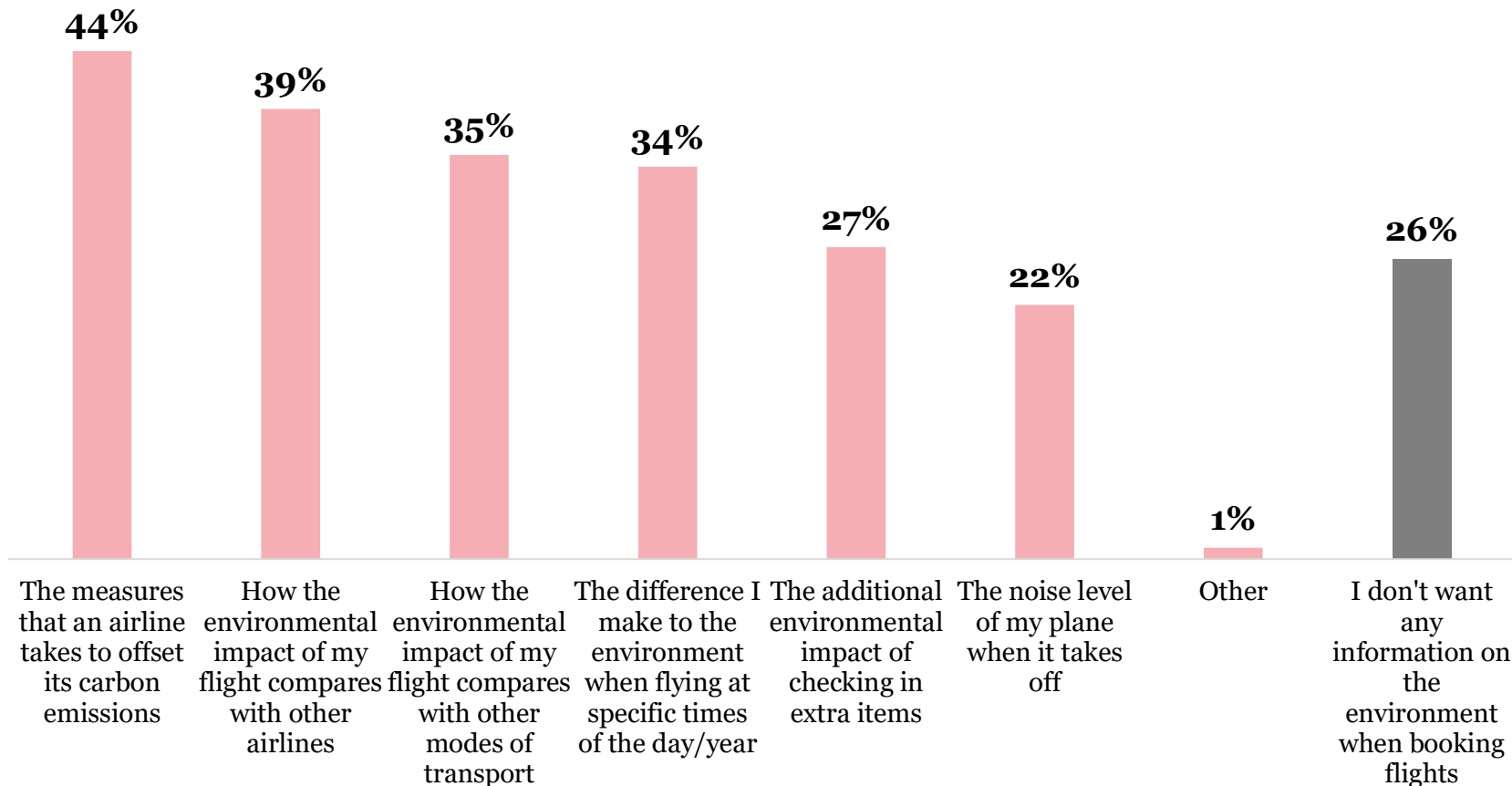
Showing % who say the following



Approaching half of respondents would like to see information about the measures that airlines take to offset their carbon emissions

Environmental information shown when booking a flight

Showing % who say the following



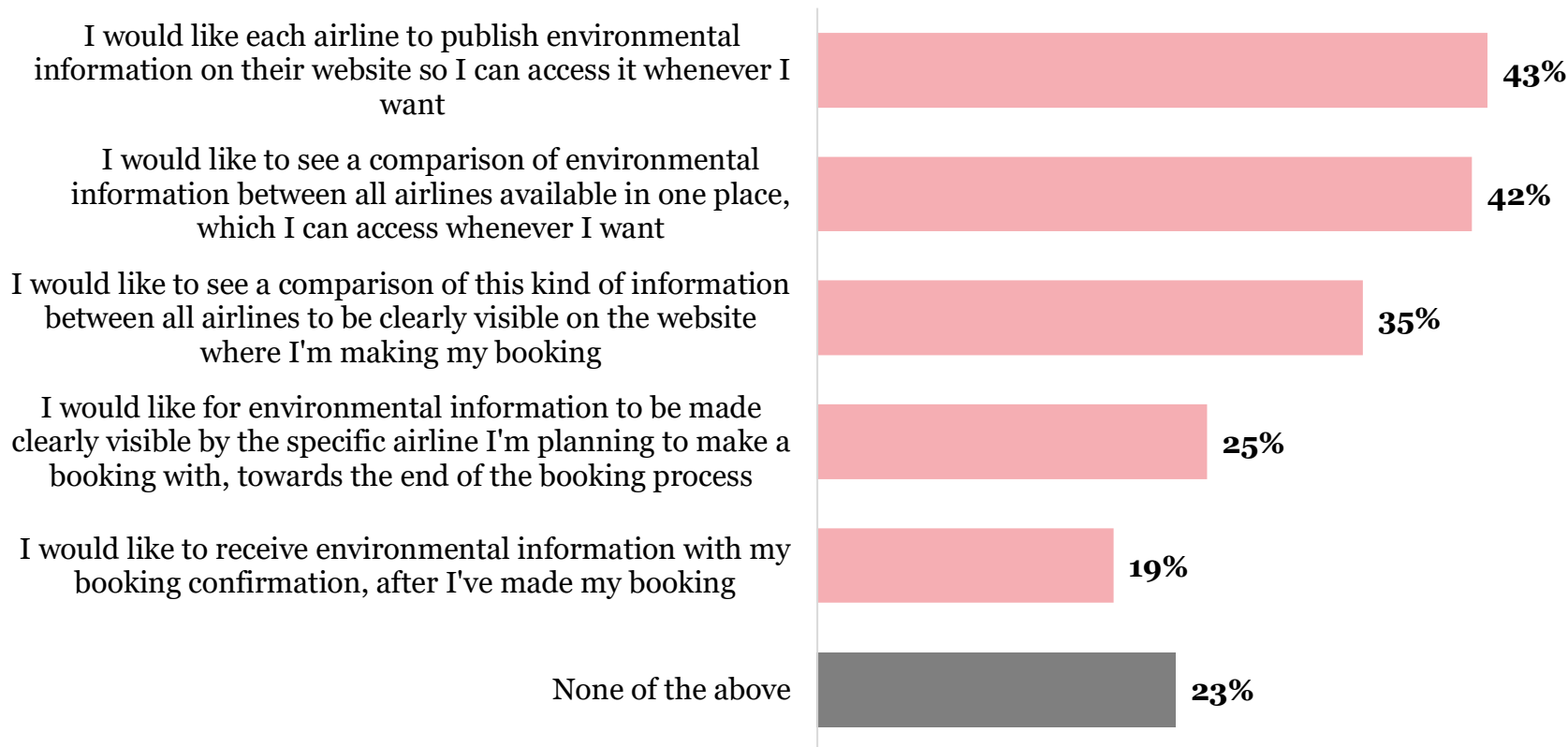
The majority (75%) of respondents would like to see multiple sources of environmental information when booking their flight.

Among the 25% of respondents who selected just one option, the information most desired is on the measures that an airline is taking to offset its carbon emissions (26%). This is followed by 'how the environmental impact of my flight compares with other modes of transport' and 'how the environmental impact of my flight compares with other airlines' (17% respectively).

Respondents are split between wanting each airline to individually publish environmental information and having it all in one place

Preference for environmental information when booking

Showing % who say the following



Approaching two thirds (63%) of respondents would like multiple ways to access environmental aviation information.

Two in five (43%) respondents say they would like each airline to publish environmental information on their site so they can access it when they want. A similar proportion (42%) say they want all the information in one place.

These are also the top two options among the 37% of respondents who selected only one option, (35% and 31% respectively).

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