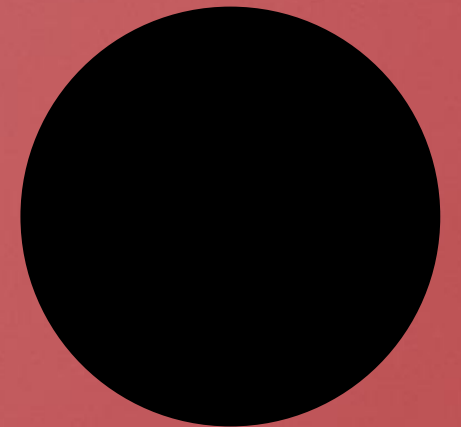
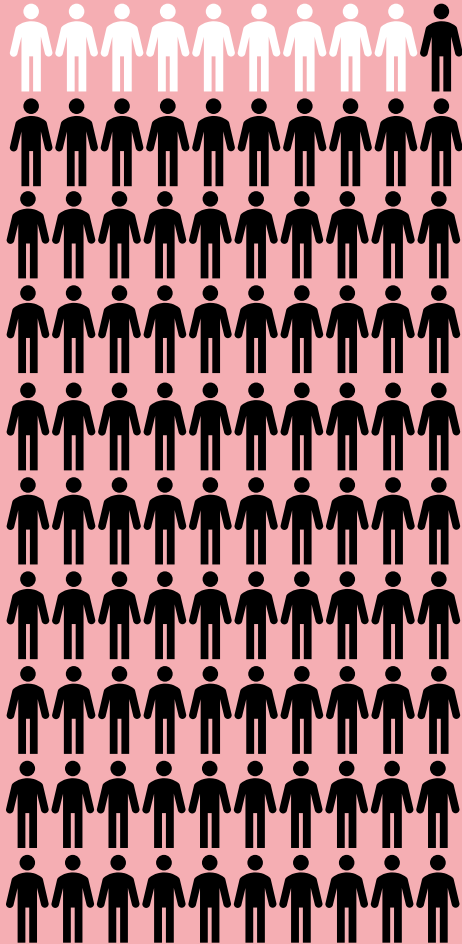

Civil Aviation Authority: UK Aviation Consumer Survey

Key Findings

Wave 9 – Winter 2020



Flying behaviour in the last 12 months



Just 9%
of respondents have flown
since the pandemic began

% of passengers that have flown in these periods:

In a typical year: Nov 2018

57%

Nov 2019

In the pandemic year: Nov 2019

Before the pandemic

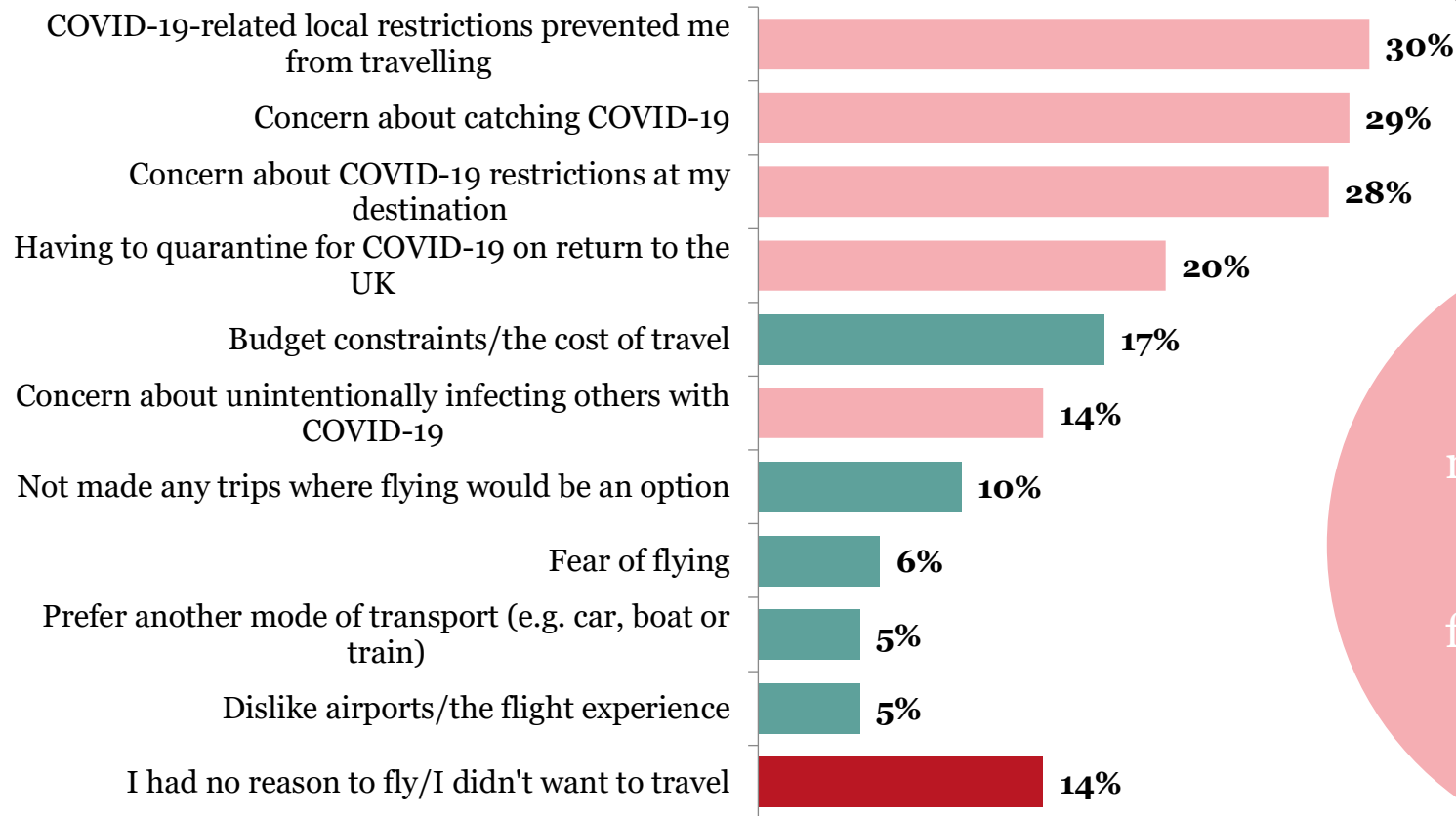
30%

Since the pandemic started

9%

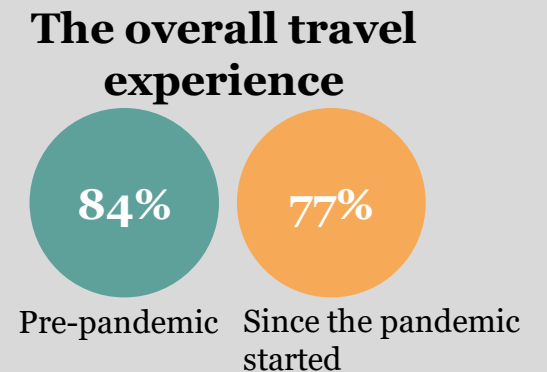
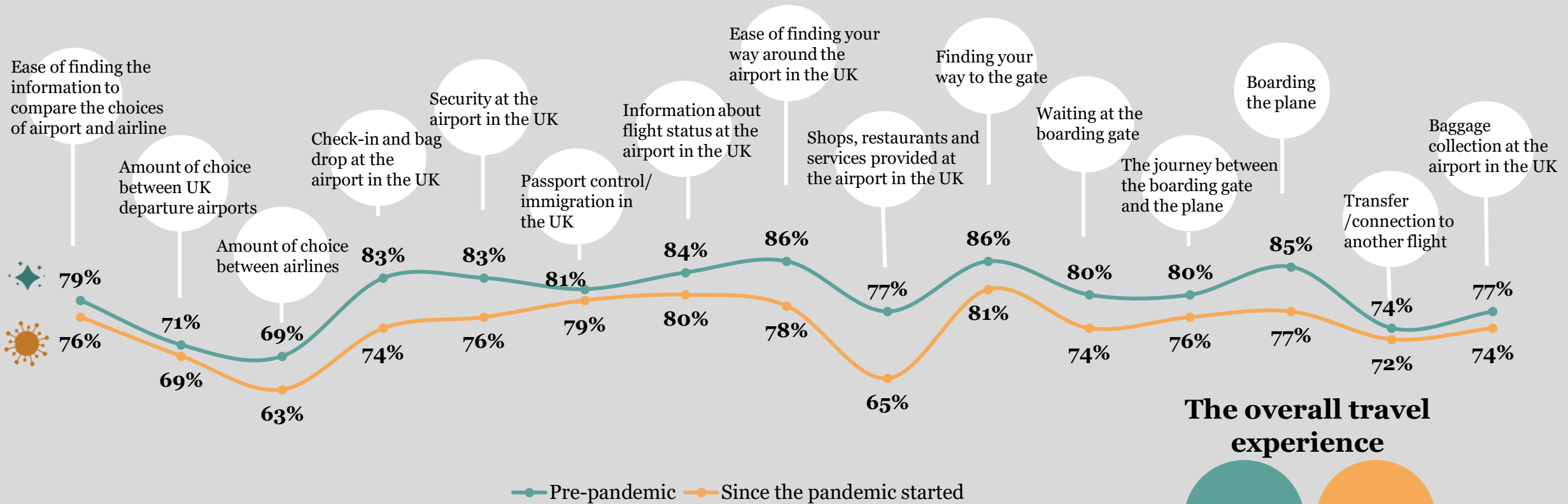
Nov 2020

Barriers to flying in the past 12 months



COVID-19 is responsible for **4** of the **top 5** reasons for people not flying in the past 12 months

Satisfaction as a passenger: Pre-pandemic vs Since the pandemic started



COVID-19 and flying – safety

I feel safe from
Coronavirus/COVID-19 when
using public transport to get
to the airport

27%
Overall

42%
Of those who
have flown
since the
pandemic
started

Airlines are doing a good job
of protecting passengers from
Coronavirus/COVID-19

38%
Overall

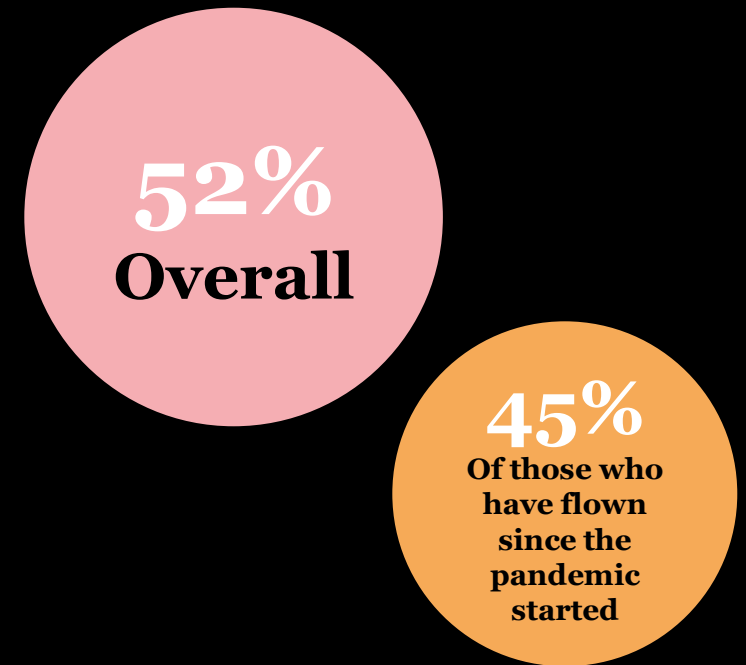
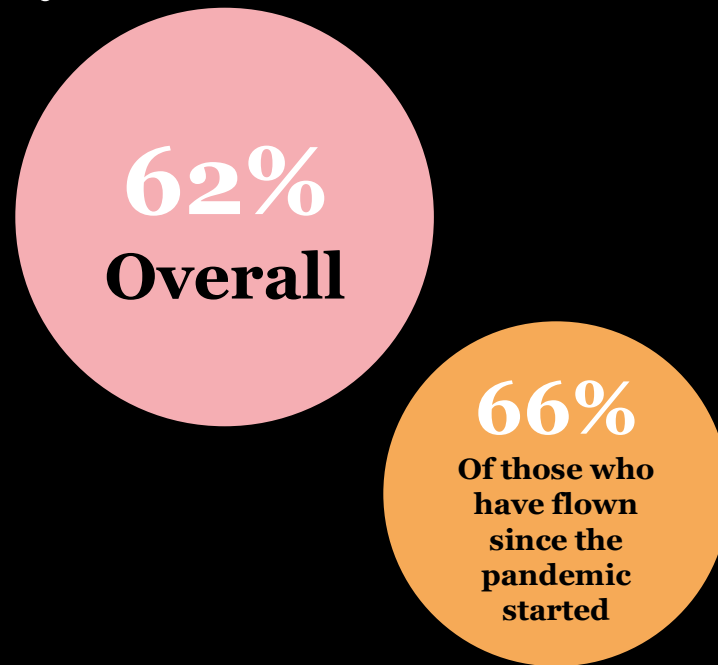
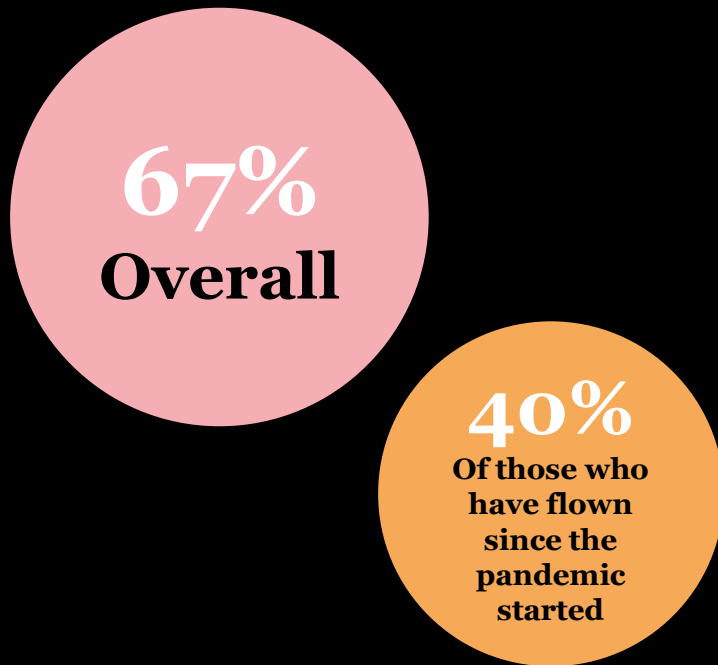
62%
Of those who
have flown
since the
pandemic
started

COVID-19 and flying – attitudes

I probably will not fly again until the COVID-19 pandemic has ended

COVID-19 testing for all passengers prior to departure would make me more confident to fly

The COVID-19 pandemic has negatively impacted on my perception of flying



When passengers plan to fly again

49%

Expect to fly in the next 12 months

