



Civil Aviation Authority

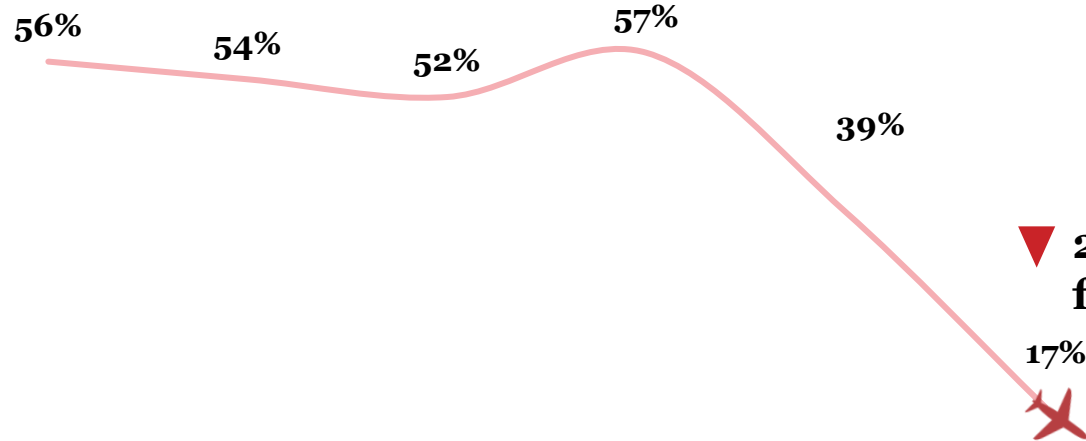
UK Aviation Consumer Survey

Wave 10 (Autumn 2021)

COVID-19 Findings

The proportion of respondents who have flown in the last 12 months has continued to fall this wave

Showing % that have flown in the last 12 months



▼ 22 percentage point drop from Wave 9

Nov '20: 1,360



Nov '21: 585

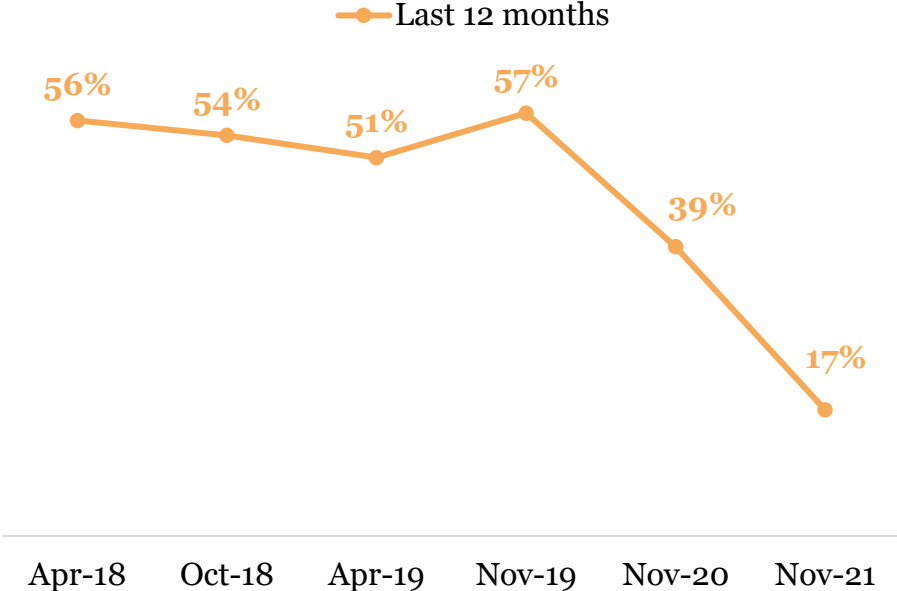


▼ 57% compared to Nov '20

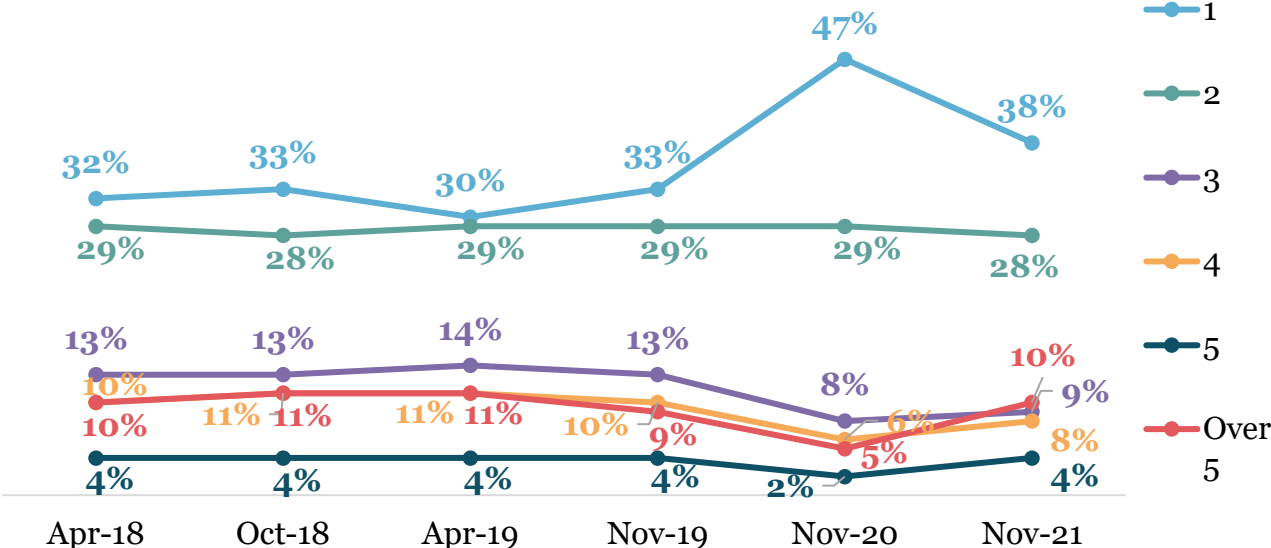


Among those who have flown in the last 12 months, around two in five have taken one flight

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

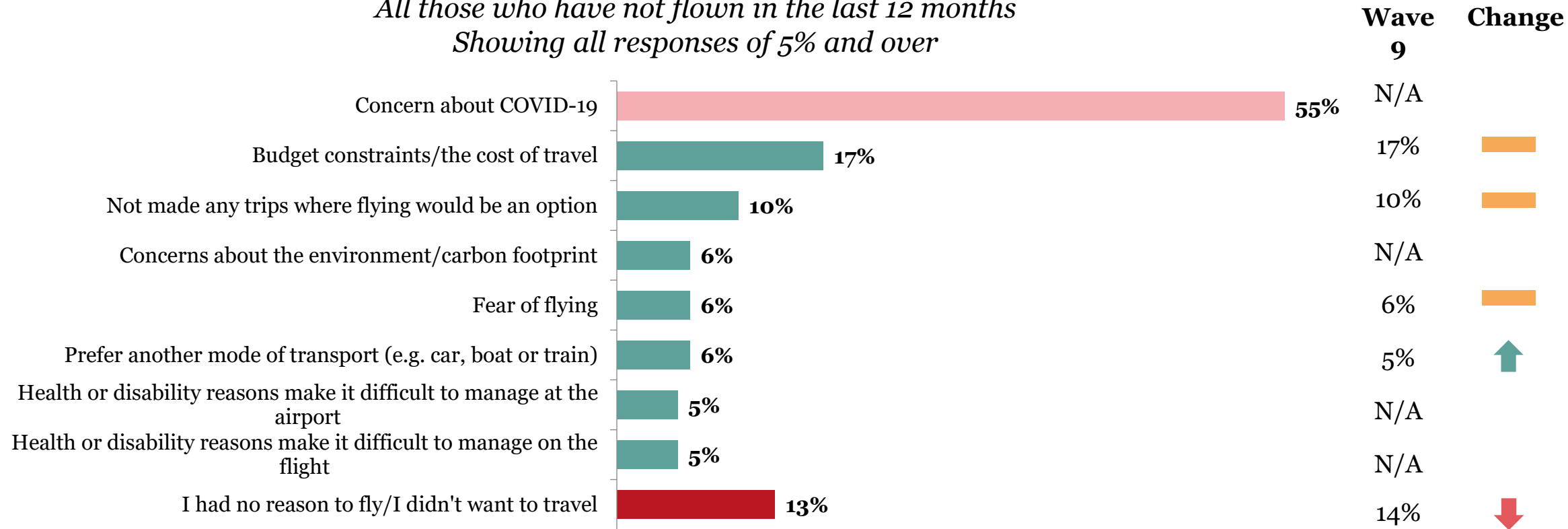


The proportion of respondents who have taken one flight in the last 12 months has fallen nine percentage points since November 2020 overall. However, the proportion taking over 5 flights in the last 12 months has risen by 5 percentage points.

3 Q1. When was the last time you flew from a UK airport? 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 respondents who have flown in the last 12 months (April 2018 n= 1,967; October 2018 n= 1,920; April 2019 n= 1,812; November 2019 n=1,994; November 2020 n=1,360; November 2021 n=585)

More than half of those who have not flown within the last 12 months cite pandemic-related concerns as the reason

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

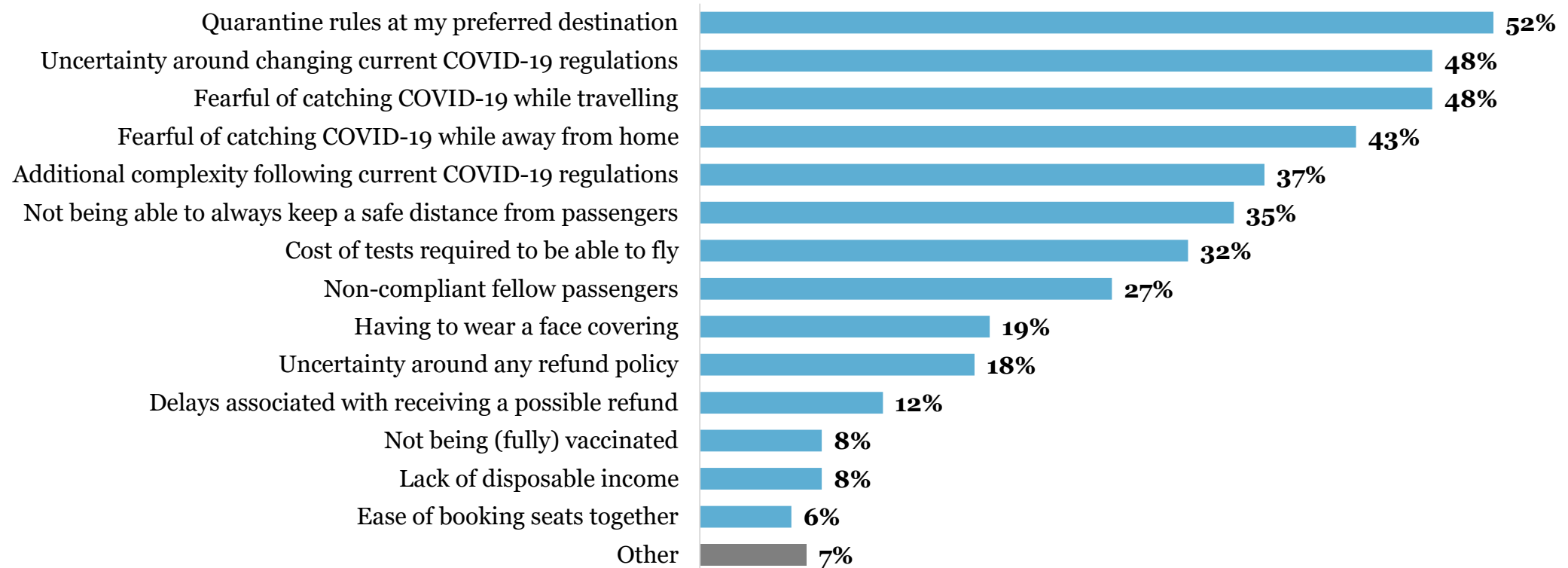


More than half (55%) of respondents stated that concern about COVID-19 was the main reason that they had not flown in the last 12 months. In line with last wave, budget constraints are the top non-COVID-19 barrier to flying (17%).

Quarantine rules at respondents' preferred destination is the top COVID related reason for not flying in the last 12 months

Barriers to flying

All respondents who have not flown because of COVID-19



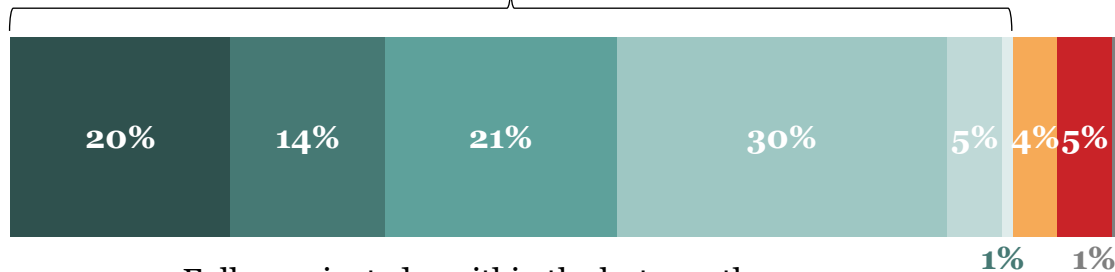
Half (52%) of respondents who have not flown because of COVID-19 say this is due to quarantine rules at their preferred destination. A similar proportion cite uncertainty around changing COVID-19 restrictions and being fearful of catching COVID-19 when away from home (48% for both).

Nine in ten of those who have flown in the last 12 months were fully vaccinated, with four in five of those fully vaccinated when they travelled last

Current Vaccination Status

All those who have flown in the last 12 months

91% fully vaccinated



- Fully vaccinated – within the last month
- Fully vaccinated – within the last TWO months
- Fully vaccinated – within the last THREE months
- Fully vaccinated – within the last SIX months
- Fully vaccinated – within the last TWELVE months
- Fully vaccinated – more than TWELVE months ago
- Partially vaccinated (had one dose of a two dose vaccine)
- Not vaccinated
- Prefer not to say

Vaccination status last time travelled

All those who are now fully vaccinated



- Fully vaccinated
- Partially vaccinated
- Not vaccinated
- Can't remember
- Prefer not to say

Nine in ten respondents who have flown in the last 12 months are fully vaccinated (91%). Men who have flown in the last 12 months were more likely than women to be fully vaccinated (94% vs. 86% respectively), and older respondents aged 35-54 and 55+ were also more likely to be fully vaccinated than those aged 18-34 (95% and 97% vs. 81% respectively).

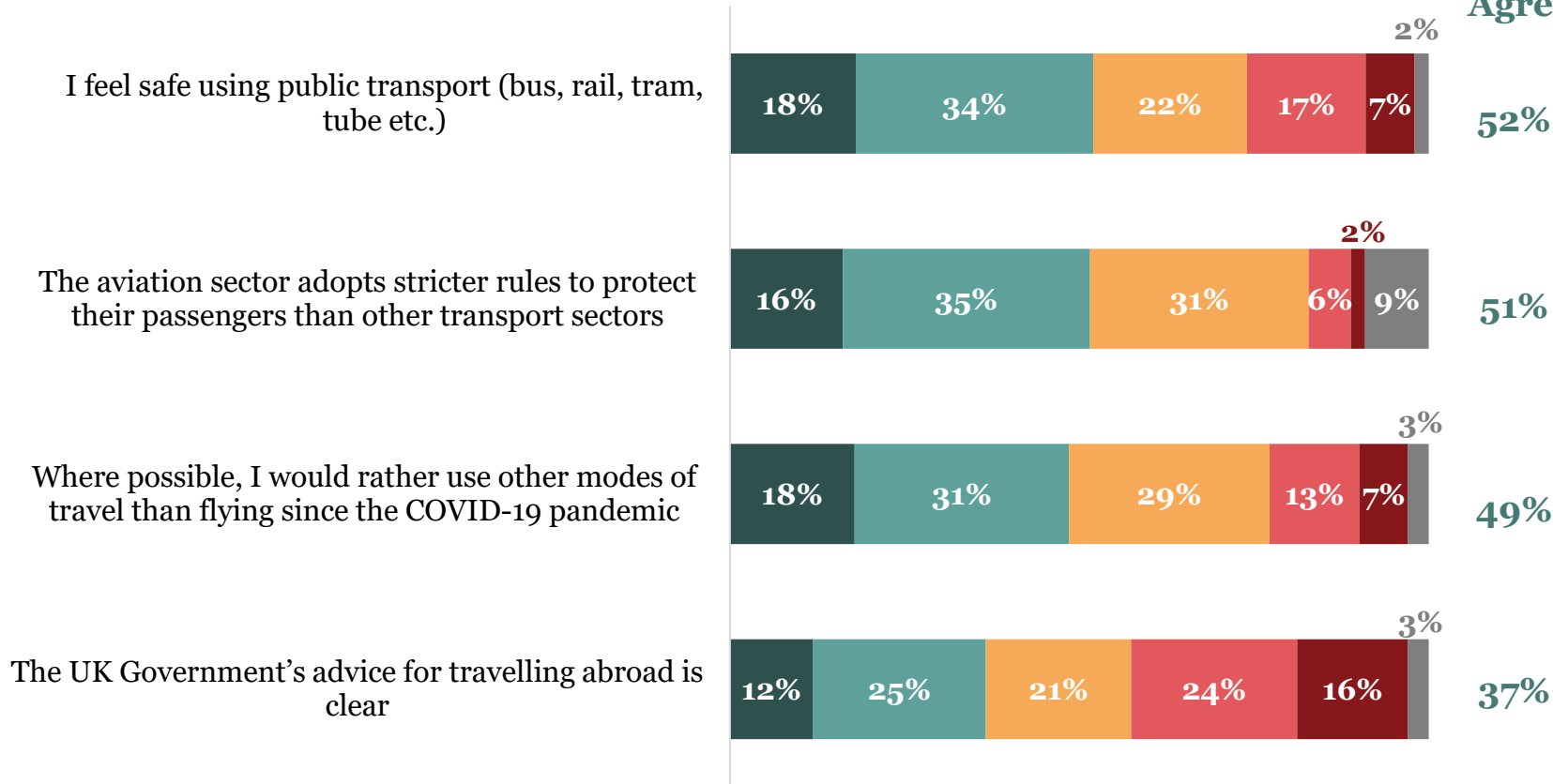
Among those who are fully vaccinated, four in five (80%) were fully vaccinated when they last travelled by air. Again, men were more likely to be fully vaccinated than women (83% vs. 74% respectively), and respondents aged 35-54 were more likely to be fully vaccinated than those 18-34 (84% vs. 75% respectively).

6 Q31. What is your COVID-19 vaccination status? Base: All those who have flown in the last 12 months (n=585)
 Q32. Thinking back to the last time you travelled by air, what was your COVID-19 vaccination status? Base: All those who are fully vaccinated (n=532)

Half of all UK adults agree the aviation sector adopts stricter rules to protect passengers than other transport sectors

Statements about travelling during COVID-19

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Don't know



Among all UK adults, half (51%) agree that the aviation sector adopts stricter rules to protect passengers than other transport sectors. However, the same proportion (49%) say they would rather use other modes of travel than flying since the COVID-19 pandemic. This suggests that while the aviation sector might outperform other sectors in this regard, respondents are discouraged to go back to flying.

Younger respondents aged 18-34 (53%) and 35-54 (54%) were more likely than those 55+ (48%) to agree the aviation sector adopts stricter rules than other transport sectors. However, they were also more likely to agree that, where possible, they would rather use other modes of travel than flying since the pandemic (51% and 51% vs. 45% respectively).

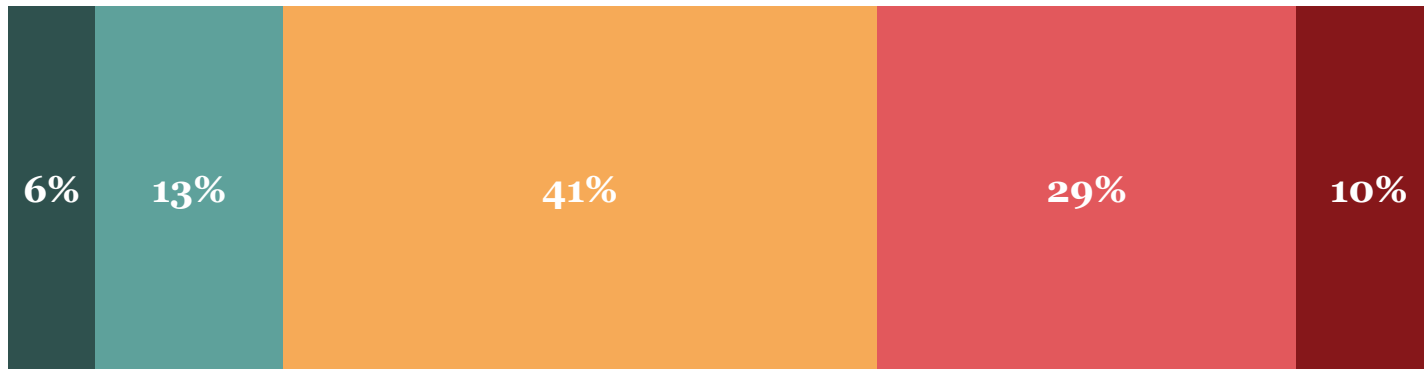
Two in five respondents feel less safe about flying when flying since the COVID-19 pandemic began

Feelings of safety flying during COVID-19 *All those who have flown since the pandemic*

■ Significantly safer ■ Safer ■ No change ■ Less safe ■ Significantly less safe

NET: Safer 19%

NET: Less safe 40%



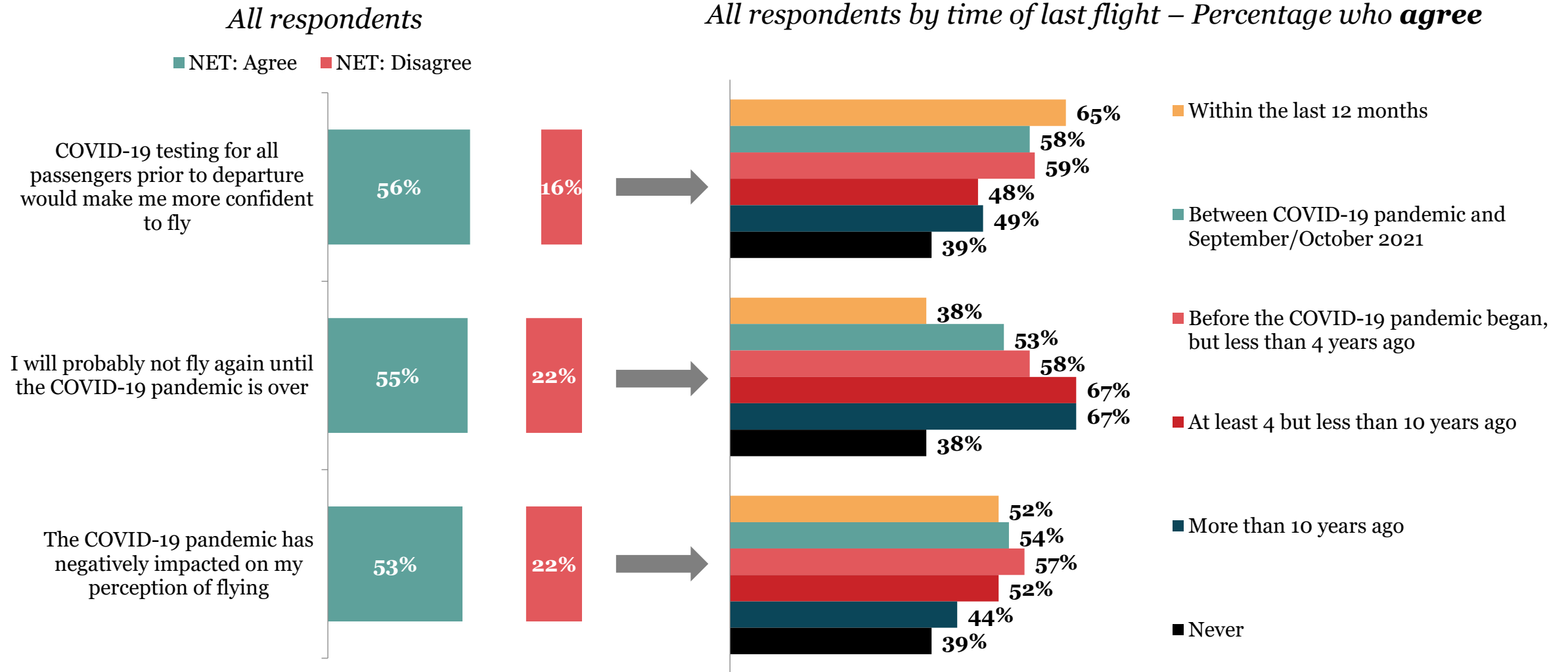
Among all UK adults, two in five (40%) feel less safe flying since the pandemic. However, the same proportion (41%) feel no change.

Those who have flown in the last 12 months are significantly more likely to say they feel safer flying since the pandemic began, than those who last flew before the pandemic began but less than 4 years ago (47% vs. 13% respectively).

Respondents aged 18-34 (30%) are significantly more likely than those age 35-54 (22%) or 55+ (7%) to say they feel safer.

Respondents from Scotland are the most likely to say they feel less safe flying since the COVID-19 pandemic (52% vs. 40% average). One in eight say they feel significantly less safe (15%). Conversely, Londoners are the most likely to say they feel safer flying since the pandemic (38% vs. 19% average).

More than half of respondents agree they will probably not fly again until the COVID-19 pandemic is over



Q19. 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=3502);

within the last 12 months (n=585); between COVID-19 pandemic and September/October (n=273); before the COVID-19 pandemic but less than 4 years ago (n=1586); at least

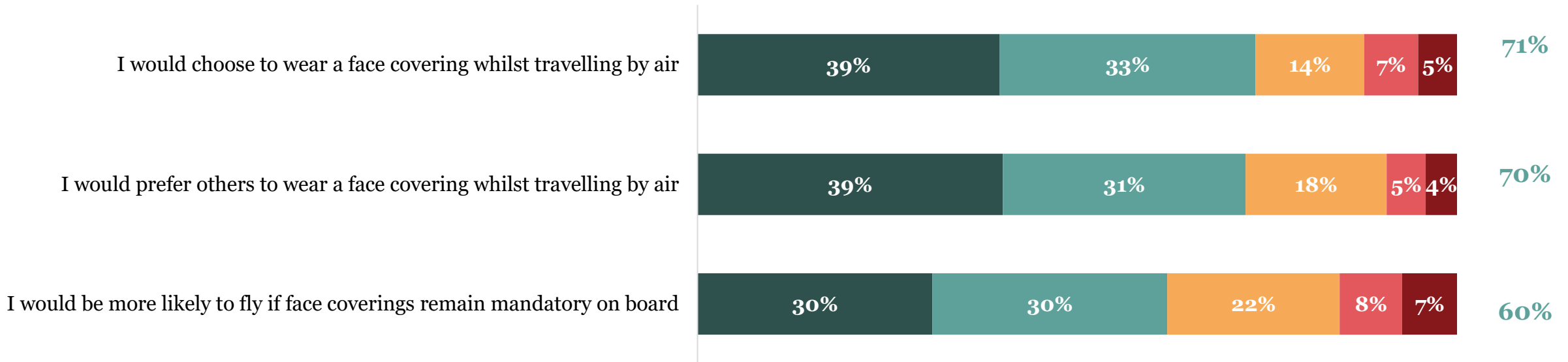
4 but less than 10 years ago (n=478); more than 10 years ago (n=364); never (n=187)

Seven in ten respondents would choose to wear a face covering whilst travelling by air, and a similar proportion would prefer others to do the same

Statements about wearing face coverings while travelling *All respondents*

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree

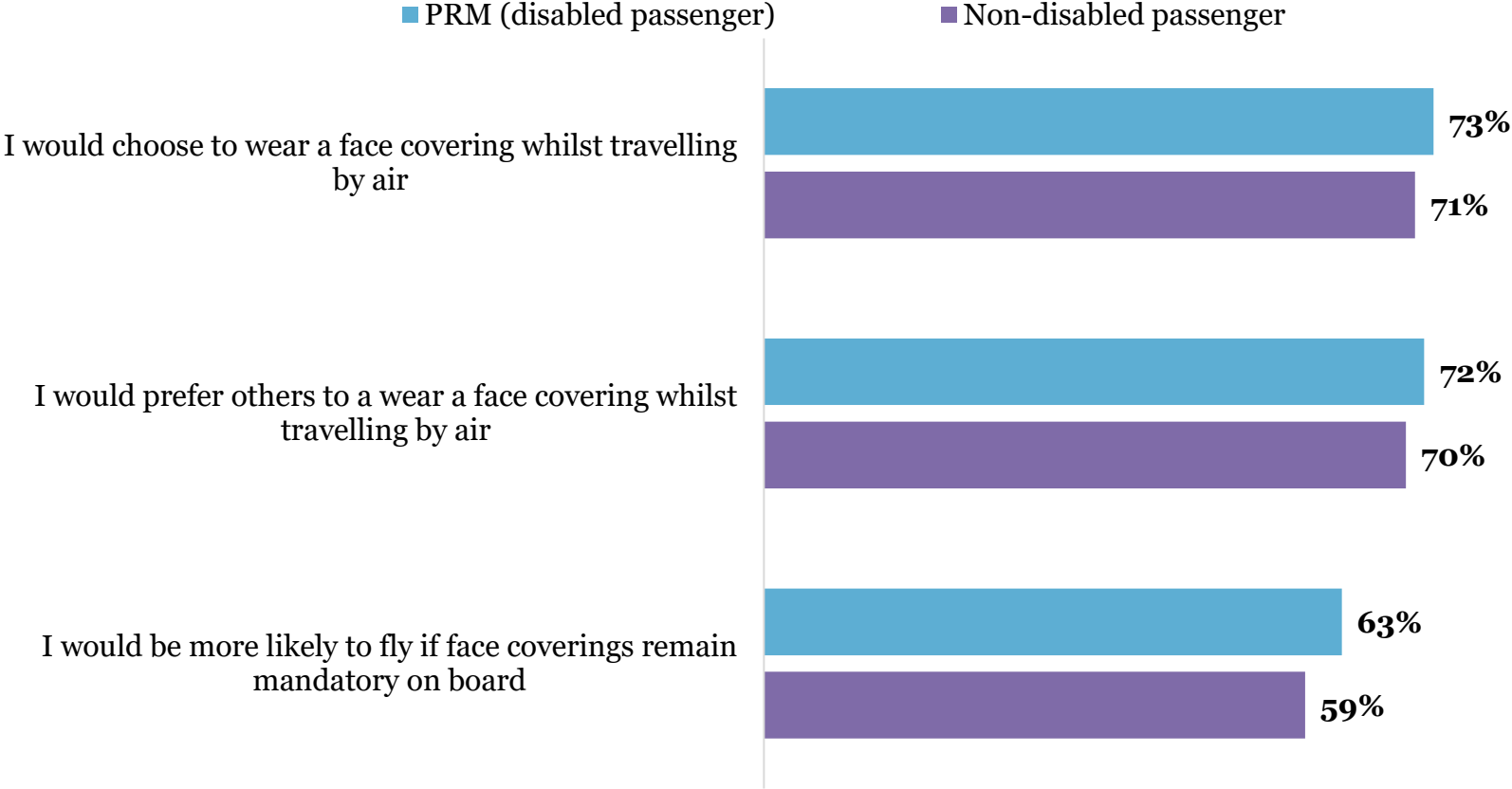
**NET:
Agree**



Older respondents aged 35-34 (73%) or 55+ (75%) are significantly more likely than those aged 18-34 (64%) to say they would choose to wear a face covering when travelling by air. Older respondents aged 55+ (62%) were also significantly more likely than those 18-34 (57%) to say they would be more likely to fly if face coverings remain mandatory on board. Respondents from Northern Ireland (71%) and London (67%) were significantly more likely to say they would be more likely to fly if face coverings remain mandatory on board, than most other regions tested (60% average).

A slightly higher proportion of disabled passengers say they are more likely to fly if face coverings remain mandatory on board than non disabled passengers

Statements about wearing face coverings while travelling
NET: Agree - by disabilities

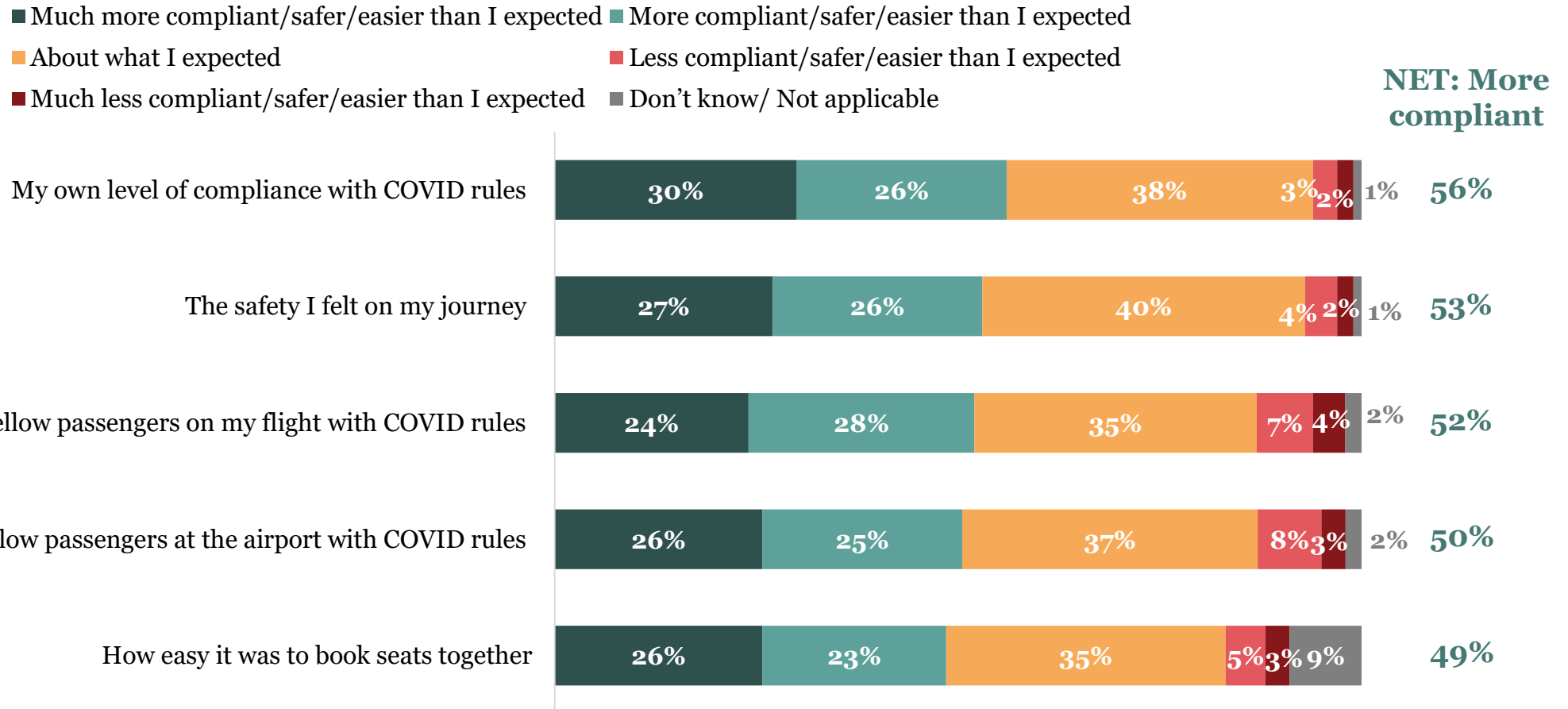


While disabled passengers are slightly more likely than non disabled passengers to say they would be more likely to fly if face coverings remain mandatory on board (63% vs. 59%), opinions about face coverings while travelling do not differ significantly between disabled and non disabled passengers.

However, among disabled passengers, those with hidden disabilities are more likely than those with non-hidden disabilities to choose to wear a face covering while travelling by air (72% vs. 64% respectively) or to prefer others to wear a face covering while travelling by air (74% vs. 61% respectively).

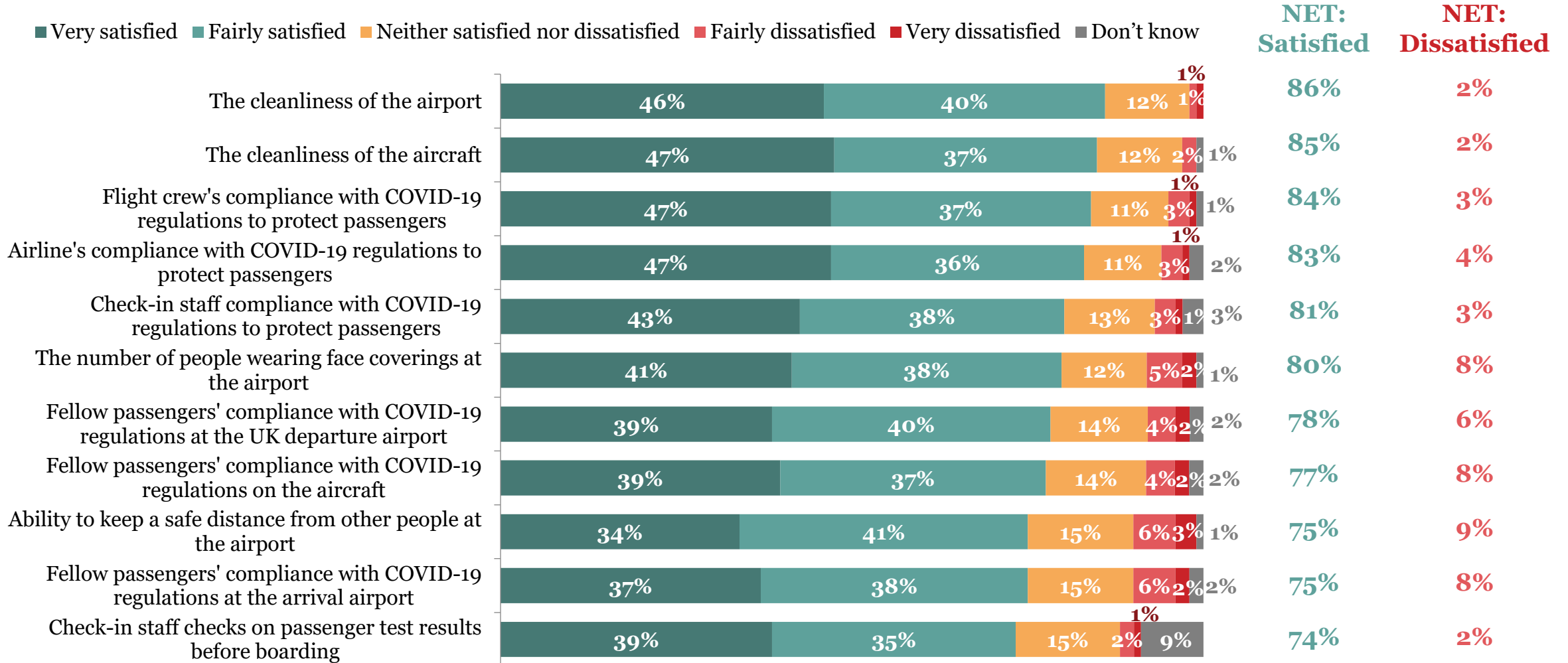
Half of those who have flown in the last 12 months say the compliance of fellow passengers with COVID-19 rules was better than expected

Compliance with COVID-19 safety *All respondents who have flown in the last 12 months*

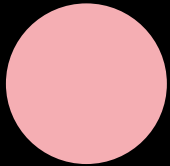


Approaching nine in ten of those who have flown recently are satisfied with the cleanliness of their airport and aircraft on their most recent flight

Last flight: Satisfaction with elements of the journey



Contact Details

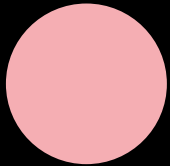


James Rentoul
James.Rentoul@Savanta.com
Director

Freddie Alloh
Freddie.Alloh@Savanta.com
Senior Consultant

Tonicha Pinnock
Tonicha.Pinnock@Savanta.com
Senior Executive

George Singleton
George.Singleton@Savanta.com
Executive



Savanta:
75 Bermondsey St.
London