Flying in 2023

Research findings from Wave 12 of the CAA's UK Aviation Consumer Survey

UK
Civil Aviation
Authority

Report by
Savanta

Contents

Objectives

The key aim of this research is to deepen the CAA's understanding of UK consumers' flying behaviours and their attitudes towards travelling by air.

An important part of building this understanding is tracking how these behaviours and attitudes change over time, and what drives this. As such, the ACS runs at regular intervals (in recent waves, annually), with this being the twelfth installment of the research.

This report makes extensive comparisons to October 2022 data – but also to November 2019 data, as understanding longer-term changes in satisfaction and passenger experience was a key objective of this year's research.

Methodology

The Aviation Consumer Tracker is a mixed-method survey – with responses gathered online and via telephone, to ensure the views of those with limited digital access were gathered:

3,510 completes

3,008 online completes

502 phone completes

Fieldwork dates:
2nd to 27th October 2023

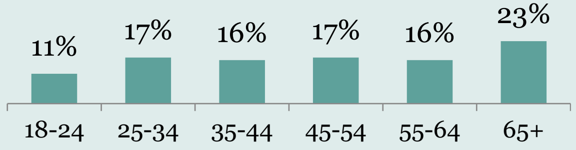
The sample is both recruited and weighted according to ONS figures on gender, age, region and working status to ensure that the sample is demographically representative of the UK. The profile of the weighted sample is shown below:

Gender

Male 49%

Female 51%

Age



Region

Representative of ONS figures for the 9 English regions, plus Scotland, Wales and Northern Ireland

Working status

Full time	41%
Part time	17%
Not working	42%

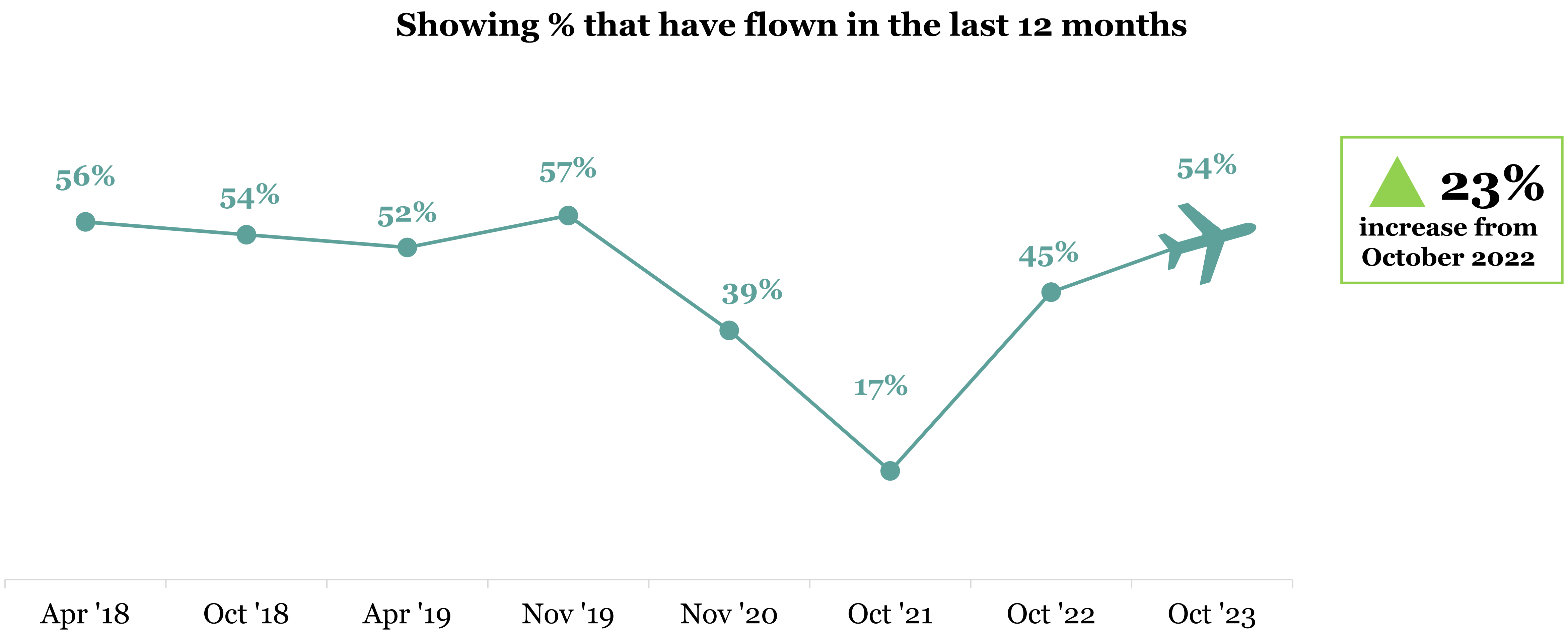
This research programme is carried out in accordance with the requirements of the international quality standard for market research and will inform the CAA's policy and strategy as it regulates the aviation market.

Headline findings

UK Civil Aviation Authority

Savanta:

The proportion of consumers flying in the last 12 months has risen back to pre-pandemic levels



Q1. When was the last time you flew from a UK airport, either to travel within the UK or to go abroad? Base: All respondents who have flown in the last 12 months, Oct-23 (n=3,510).

However, the profile of recent flyers is different post-pandemic, with older people and disabled people much less likely to have recently flown than in 2019

Showing % who flew in the last 12 months, by age and disability status

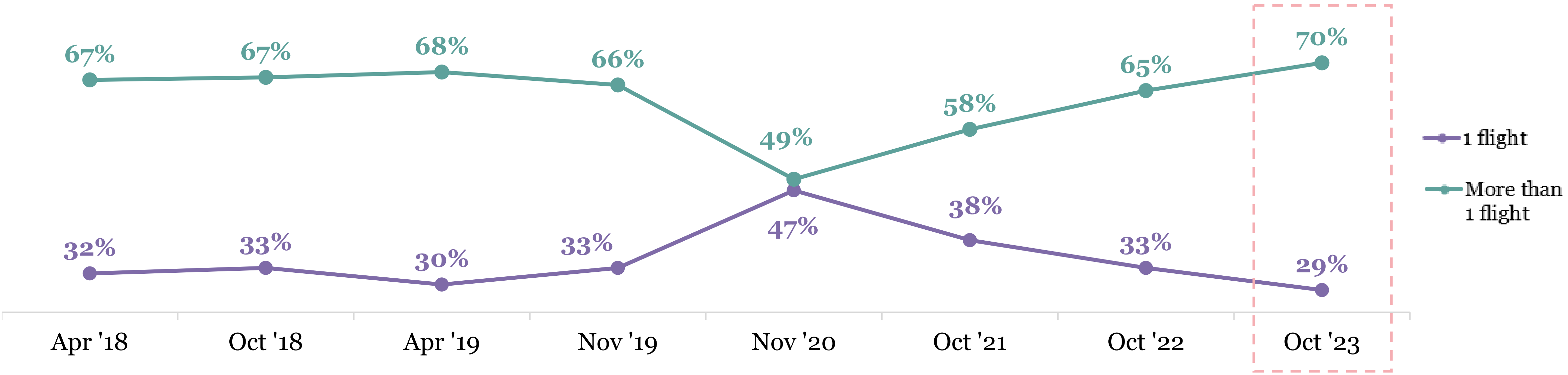
	Overall	18-34	35-54	55+	Disability	No disability
November 2019	57%	55%	57%	58%	40%	63%
October 2023	54%	65%	54%	47%	34%	60%

In 2019, 58% of consumers aged 55 and over said that they had flown in the last 12 months. The figure recorded in 2023 is just 47%. **Older consumers, therefore, are now much less likely to have flown recently than in 2019. Similar is true of disabled consumers**; in 2019, 40% of disabled consumers had flown recently, falling to 34% in 2023.

Q1. When was the last time you flew from a UK airport, either to travel within the UK or to go abroad? Base: All respondents who have flown in the last 12 months, Oct-23 (n=3,510).

Recent flyers are also more likely to be *frequent* flyers than before, with the proportion taking *multiple* trips in the last year at an all-time high

Number of flights in last 12 months – showing % taking a single trip by air vs. multiple trips
Tracked since Apr 2018
All those who have flown in the last 12 months



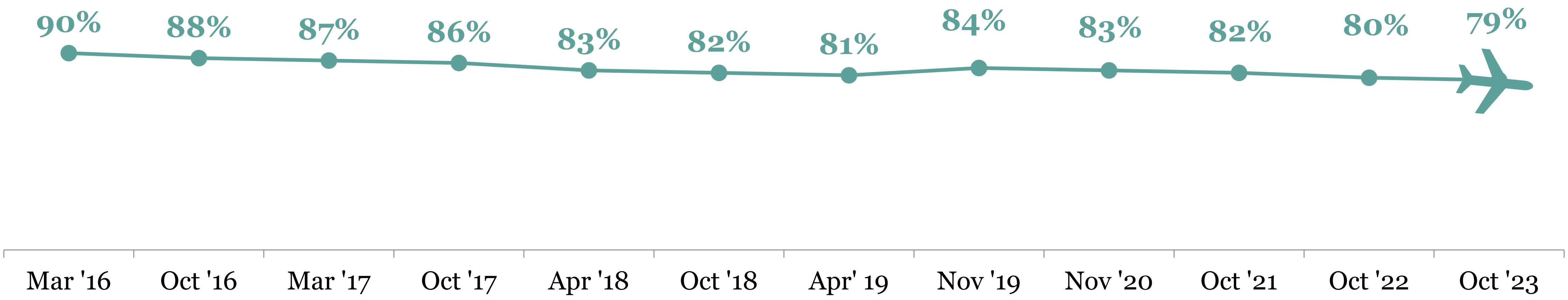
During the pandemic, many of those who continued to fly still did so less frequently than they ordinarily would. Flight frequency amongst recent flyers has steadily risen back to 2019 levels in recent years, but **2023 sees flight frequency amongst recent flyers *surpass* pre-pandemic levels for the first time. Consumers who have flown in the last 12 months are more likely than ever before to have taken multiple trips (70%) during this period.** This is likely driven in part by the demographic changes in recent flyers already discussed; across previous waves of this research, younger consumers and those without disabilities have consistently been more likely to be frequent flyers.

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 (n=1,910 in Oct '23).

Unlike flying frequency, passengers' satisfaction with their most recent flying experience has fallen steadily since 2019

Showing % satisfied with the overall travel experience on most recent trip

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



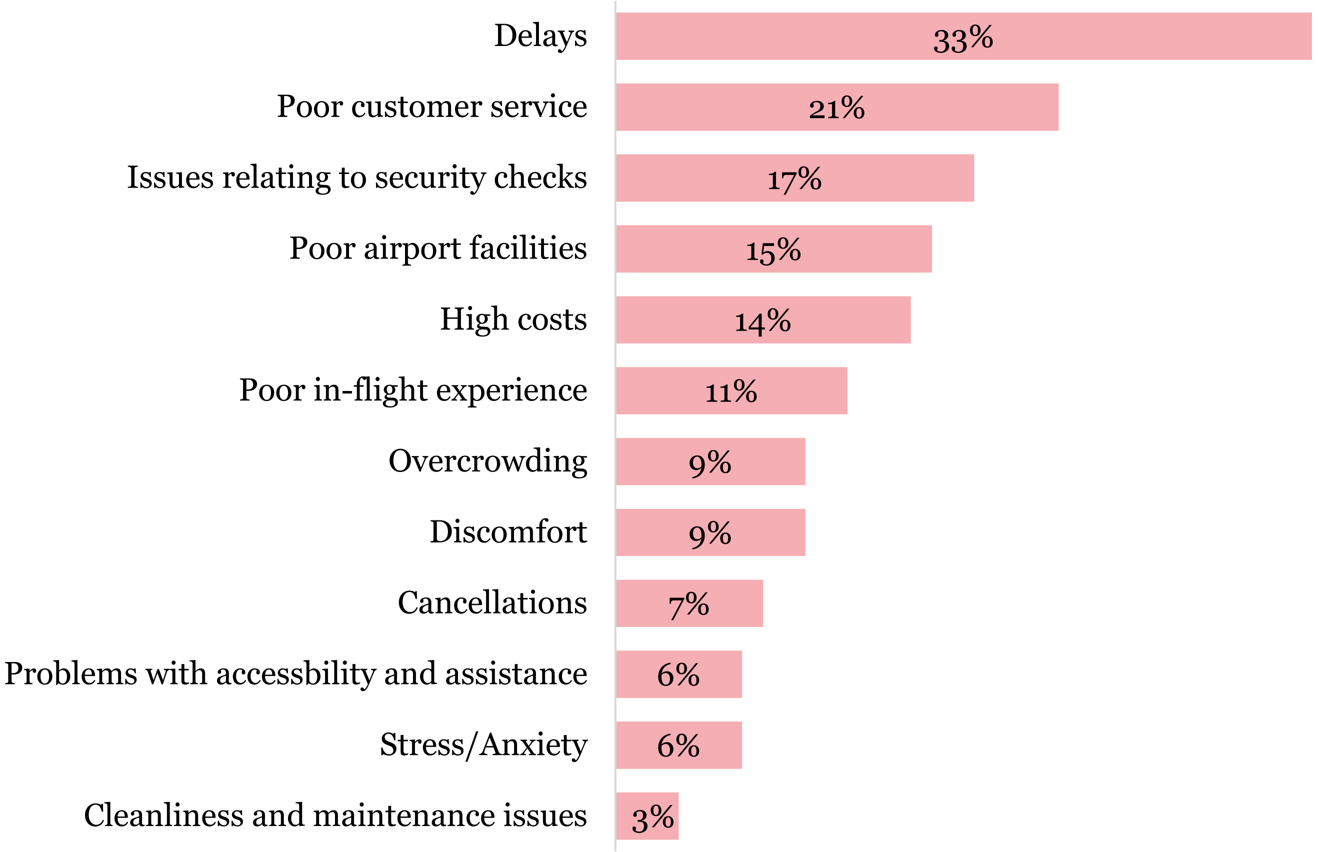
The proportion of recent flyers who were satisfied with their most recent flight has fallen from 80% in 2022 to 79% this year. This is a small change, and is not in itself a cause for concern. **However, a decline of this kind has occurred every year since 2019, and consequently the cumulative, longer-term trend is more noteworthy.** In March 2016, 9 in 10 consumers (90%) were satisfied with their most recent journey, a figure considerably higher than the one recorded in 2023 (79%). Satisfaction saw a decline during the pandemic, much like flight frequency. However, unlike flight frequency, **satisfaction has continued to fall post-pandemic**, rather than returning to previous levels.

Q23.17. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,903).

Passengers who were dissatisfied with their travel experience reported delays, poor customer service and issues at security

Showing reasons spontaneously given for poor travel experience

All who were dissatisfied with the overall travel experience



"The time to go through security is long and painful, and the whole journey is stressful on the body physically. The plane I went on was freezing and I got backache when I reached the end destination." – **Male, 35-44, East of England**

"We got stranded at Gatwick, no assistance from the airline staff, our luggage was left out in the rain for hours, we had no help, we were left to fend for ourselves, and ended up having to rebook the flight." – **Female, 25-34, Scotland**

"Far too busy and going through passport control is mad. Very expensive outlets." – **Female, 45-54, East of England**

"Poor communication from the airline, too much queueing and very high prices for food and drink." – **Male, 45-54, East of England**

"The flight was cancelled and it became very confusing about what to do and where to go" – **Female, 60-64, North West**

"The flight was delayed and we had a baby with us. And we had no help from the airport staff or the airline. And there were instances of staff being rude." – **Female, 25-34, East of England**

"Everything now seems to take longer from arriving at the airport to leaving the airport at your final destination. Crowds seem bigger, queues longer, checking in is more stressful with automated check in"- **Male, 65-74, South West**

Q24. Why were you dissatisfied with the overall travel experience? Please tell us about any issues you had. Base: Those who were dissatisfied with the overall travel experience (n=127).

Whilst cross-industry comparison is difficult, it appears consumer satisfaction is more stable in other UK transport industries

Comparing satisfaction between the aviation industry and other UK transport sectors is difficult due to significant contextual differences between these industries. The following studies are therefore not perfectly comparable to the ACS. That said, they do nonetheless suggest that satisfaction within the UK aviation industry may be less stable than other transport sectors:

- Transport Focus' National Rail Passenger Survey (NPRS) was paused in 2020 due to the pandemic. However, in the period prior to this, no decline in satisfaction with rail travel was recorded, in contrast to the steady decrease in aviation satisfaction recorded by the ACS. **Satisfaction with the overall travel experience in the rail industry consistently ranged between 80-83% from 2016 to 2020.**

- In addition to the NPRS, **Transport Focus runs regular Rail User and Bus User surveys, both of which show very consistent satisfaction levels with no long-term downward trend.** It appears that a satisfaction score of around 85% is common in these industries. Whilst aviation satisfaction is not substantially lower than this, it is worth noting that other transport industries do not appear to be facing the same challenges with steadily declining customer satisfaction.

- The 2023 edition of The Institute of Customer Service's UK Customer Satisfaction Index (CSI) gives a slightly different picture, suggesting that overall customer satisfaction is slightly higher in aviation compared to rail and bus industries. This index incorporates a much wider variety of measures and so its findings do not necessarily contradict these other studies. In any case, even with this different methodology, the CSI nonetheless finds that **customer satisfaction is declining faster in aviation than in these industries, based on data in 2022 and 2023. The CSI also highlights complaints handling as an area where the aviation industry in particular sees substantial year-on-year declines, aligning with ACS findings.**

NPRS, Rail User, and Bus User surveys retrieved from: https://transportfocusdatahub.org.uk/.
CSI retrieved from: https://www.instituteofcustomerservice.com/research-insight/ukcsi/.

Satisfaction has declined particularly sharply amongst older people and disabled people since 2019, which may explain why they are flying less

Showing percentage of recent flyers who were satisfied with the overall travel experience on their last trip by air, by age and disability status

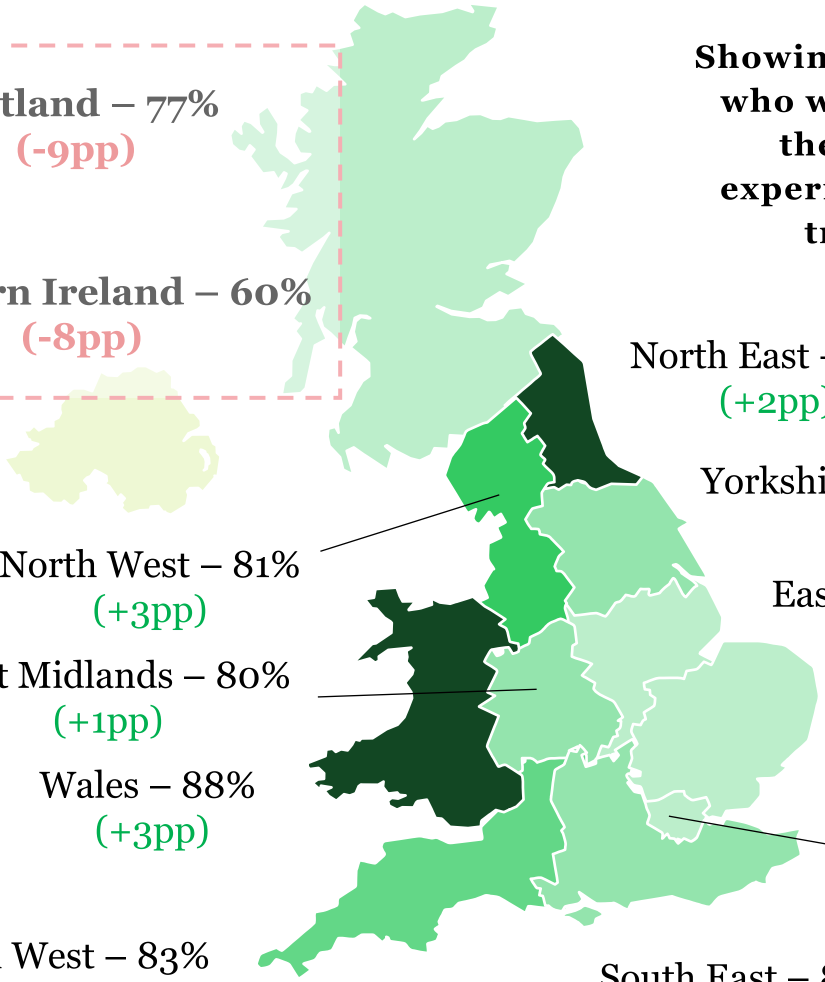
	Overall	18-34	35-54	55+	Disability	No disability
November 2019	84%	82%	83%	86%	82%	84%
October 2023	79%	79%	81%	78%	74%	80%
Change	-5pp	-3pp	-2pp	**-8pp**	**-8pp**	-4pp

Satisfaction with the overall travel experience is lower than in 2019, amongst all age groups and amongst both consumers with and without disabilities. **However, the starkest decreases in satisfaction since 2019 occur amongst passengers aged 55 and above, and disabled passengers,** with an 8-percentage-point decrease in satisfaction recorded in both cases. This indicates that **the experience of flying is worsening at a faster rate for these passengers than others.** Later sections of this report explore the experience of older passengers and the experience of disabled passengers in more detail, discussing the specific elements of aviation and junctures in the customer journey that have driven this decline.

Q23.17. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,903).

In the more recent term, satisfaction with the overall travel experience falls substantially from 2022 in Scotland and Northern Ireland

Showing % of recent flyers who were satisfied with the overall travel experience on their last trip, by region



Whilst comparisons to 2019 are useful in highlighting longer-term trends in satisfaction, there are also some passenger groups that see notable drops in satisfaction since 2022. **Recent flyers who live in Scotland and Northern Ireland are two such groups, with both groups experiencing large drops in overall satisfaction since last year. Satisfaction with the overall travel experience continues to be much lower in Northern Ireland than any other UK region.**

These decreases in satisfaction appear to be related to the airport from which these passengers flew. **Passengers whose last flight was from Belfast International or Glasgow International are over twice as likely to be dissatisfied with the overall travel experience than recent flyers from any other airport**. This wasn't the case in 2022, which suggests that flyers have had a much worse experience when flying from these airports this year.

Recent flyers from Northern Ireland and Scotland are also the least likely to be satisfied with transfers and connections to other flights (56% and 67% respectively), which may also bear upon the overall travel experience.

Q23.17. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,903).

Digital confidence continues to be a large determinant of satisfaction, with this digital divide widening since last year

Showing % of recent flyers who were satisfied with the overall travel experience on their last trip, by level of digital confidence
(see footer for exact definition)

	Very/somewhat confident	Not very/not at all confident
October 2022	80%	71%
October 2023	80%	66%
	No change	-5pp

Notably, **recent flyers who are not very or not at all digitally confident are also over three times as likely to be *actively dissatisfied* with the overall travel experience than in 2022** (4% in 2022, 14% in 2023).

Passengers who lack confidence in using computers, smartphones and other electronic devices to do the things they need to online are considerably less likely to be satisfied with their most recent flight. **Just two thirds (66%) of recent flyers with low digital confidence were satisfied with the overall travel experience on their most recent trip.** This is significantly lower than amongst those who are digitally confident (80%).

This digital divide in satisfaction levels is also clear at most of the individual stages of the customer journey. Those with low or no digital confidence are significantly less likely to be satisfied than more digitally confident passengers with navigating the airport, transport from the boarding gate to the plane, passport control and security, and finding information to compare choices of airport and airline.

D5. Overall, how confident do you feel using computers, smartphones, or other electronic devices to do the things you need to do online? Base: all respondents (n=3,510).
Q23.17. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,903), including those who say they are very/somewhat digitally confident (n=1,830) and those who are not very/not at all digitally confident (n=70).

Satisfaction across the passenger journey

UK
Civil Aviation
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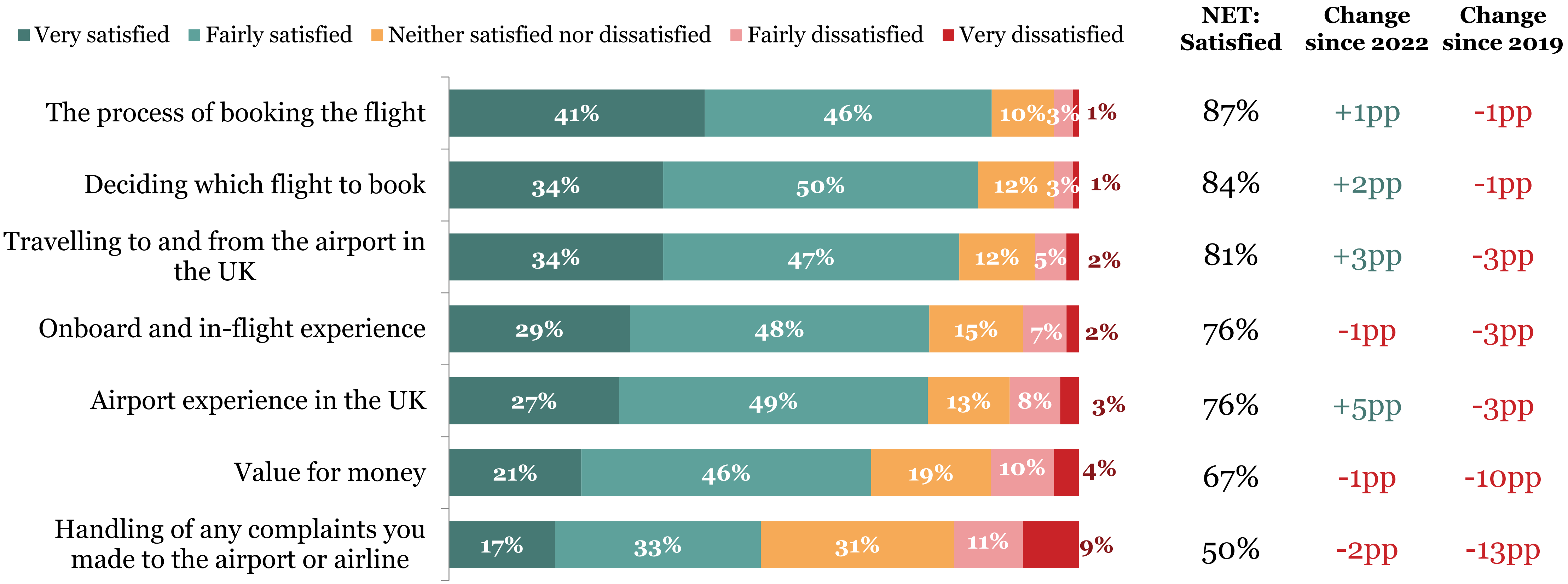
Savanta:

Consumers are less likely to be satisfied with all aspects of the travel experience than in 2019, but value for money and complaint handling see particularly large declines in satisfaction

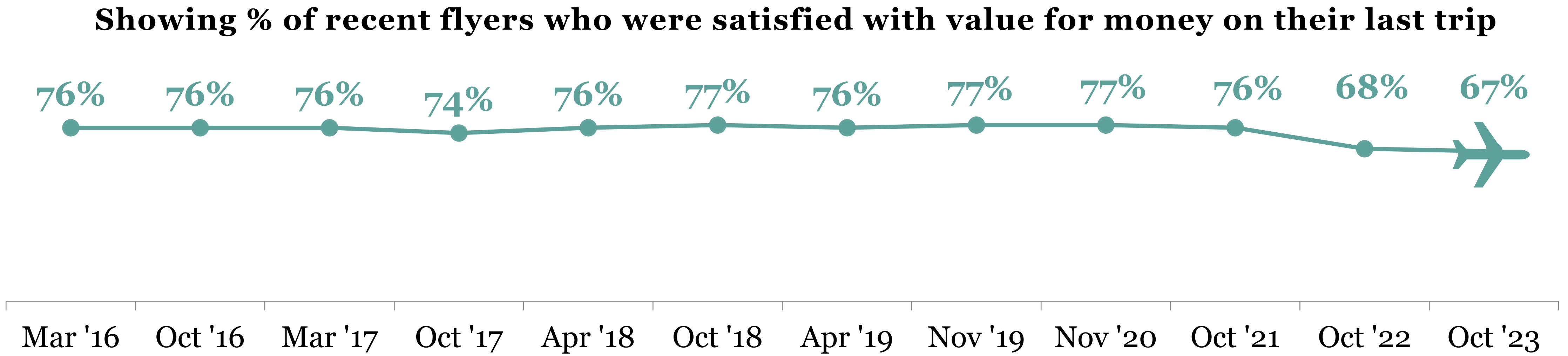
Last flight: Satisfaction with elements of the travel experience

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



Q22. How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1,006-1,900).

Lower satisfaction with value for money must be understood in the context of the rising cost of living



Until the rising cost of living became widely felt last year, satisfaction with value for money amongst recent flyers was relatively stable, with the proportion of recent flyers satisfied in this area remaining within a 1-percentage-point margin between April 2018 and October 2021. **The significantly lower levels of satisfaction with value for money seen this year and last are likely linked to the wider economic situation.**

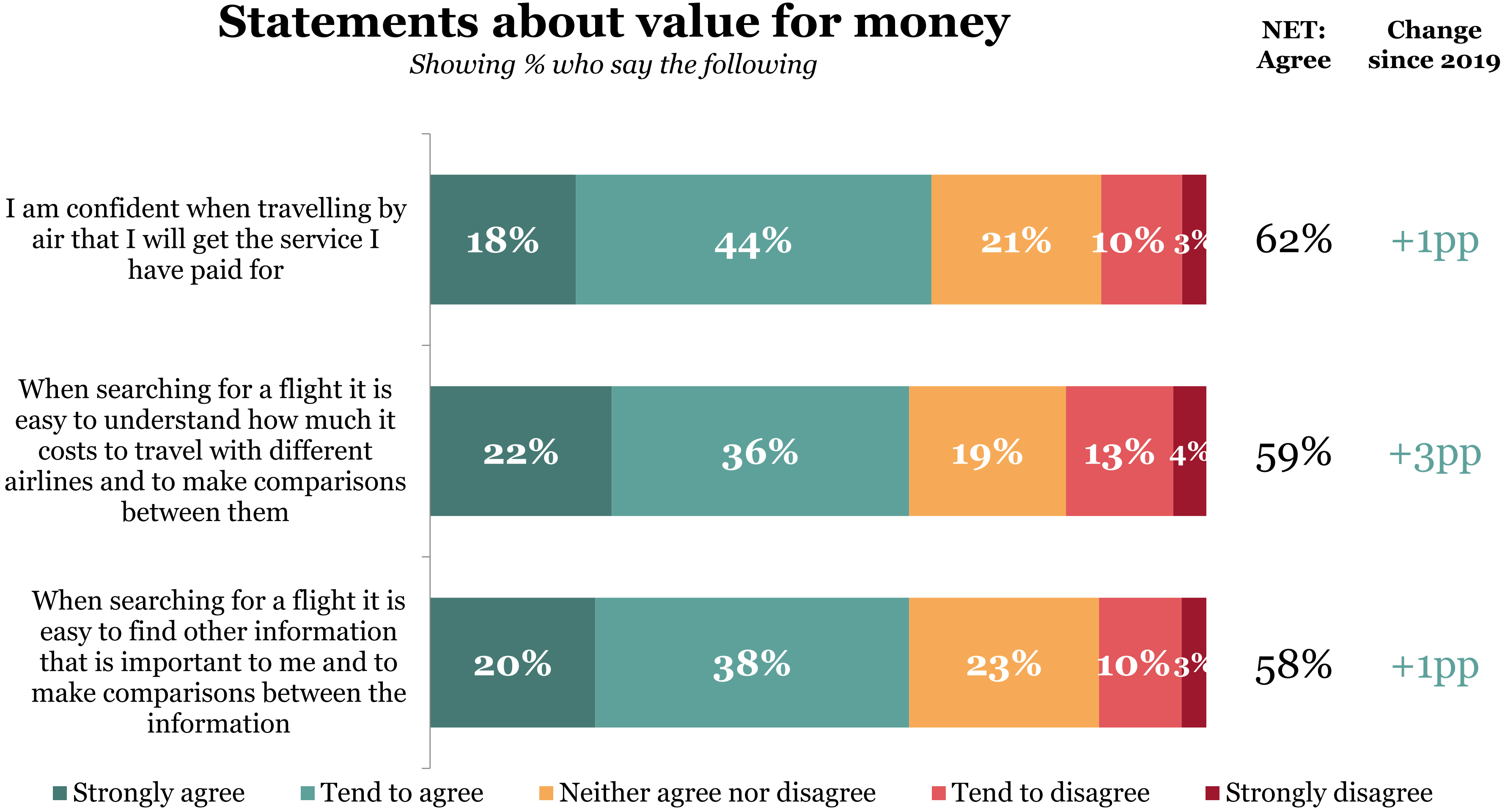
Supporting this hypothesis, budget constraints continue to be widely felt this year, with **the impact of the rising cost of living remaining the most widely-cited reason for not travelling amongst passengers who have not flown in the last 12 months –** 32% of those who have not flown recently identify this as the reason.

Q22.6. How satisfied or dissatisfied were you with value for money? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1,887). Q5. Why have you not flown within the last 12 months/few years/never? Base: All who have not flown recently (n=1,567).

The impact of the cost of living on value for money perceptions cannot be overemphasised, as flyers are just confident as in 2019 that they will get the service they have paid for, and are *more* likely to find comparing airline costs easy

Statements about value for money

Showing % who say the following



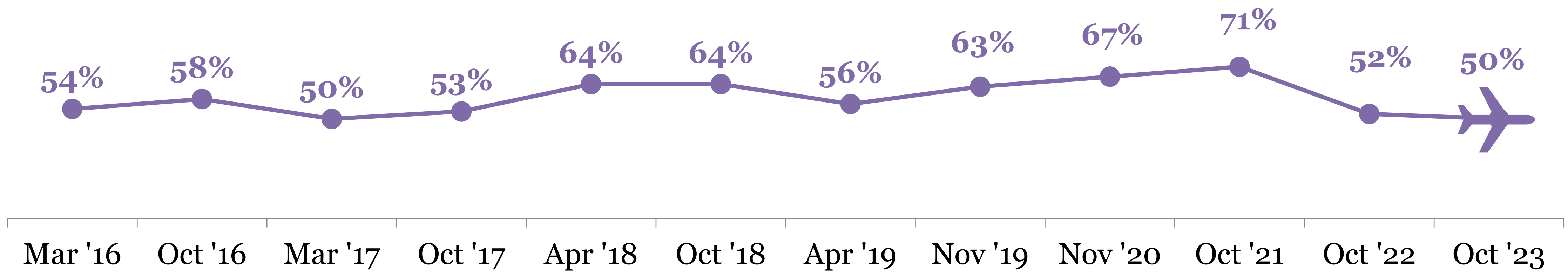
As mentioned on the previous page, declining consumer satisfaction with value for money must be understood in the context of the rising cost of living.

Since 2019, there has been a slight *improvement* in metrics associated with meeting expected service levels and ease of choice among flight options, sharply contrasting with the considerable decline in satisfaction regarding the value for money.

Q21. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3,510).

Satisfaction with complaints handling has fluctuated considerably over recent years, though 2023 sees it at its joint-lowest level on record

Showing % of recent flyers who complained about their last trip and were satisfied with how it was handled



Unlike value for money, complaints handling is also an area in which **the gap in satisfaction by age and disability status is growing:**

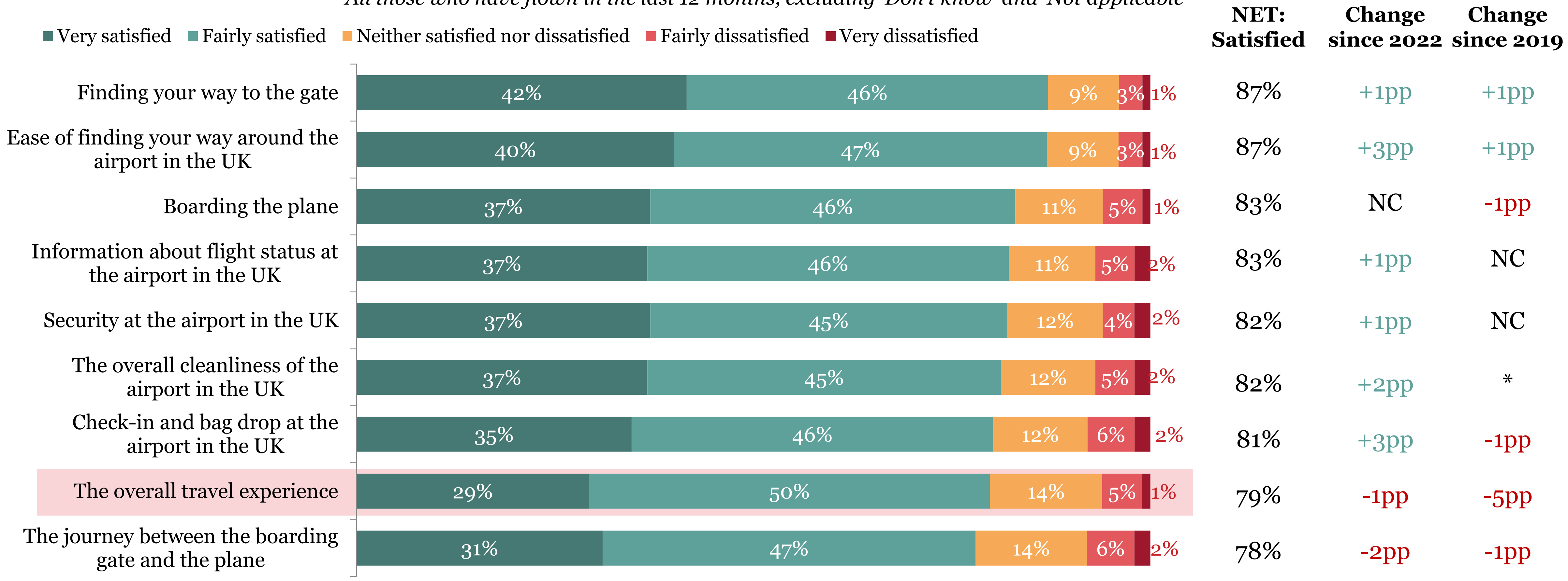
	Overall	18-34	35-54	55+	Disability	No disability
November 2019	63%	67%	62%	57%	69%	62%
October 2023	50%	55%	49%	42%	51%	49%
Change	-13pp	-12pp	-13pp	**-15pp**	**-18pp**	-13pp

Q22.7. How satisfied or dissatisfied were you with the handling of any complaints you made to the airport or airline? Base: All who have flown in the last 12 months and made a complaint, excluding DK and NA responses (n= 1,006).

As was the case last wave, navigation around the airport and to the gate are areas of particularly high satisfaction

Last flight: Satisfaction with more specific aspects of flight (UK) – Part 1

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



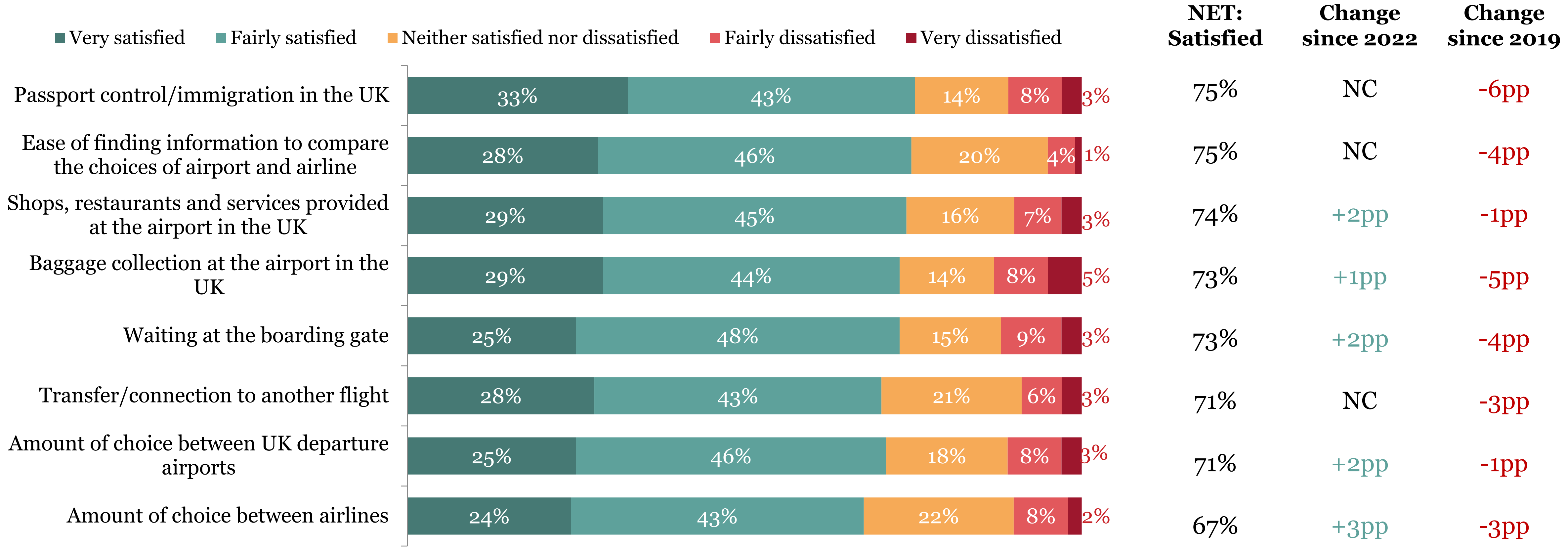
Q23. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,774-1,903). *No data available for 2019 as this was only added to the survey in 2022.

Savanta

The worst-performing satisfaction metrics in 2023 have all seen notable drops since 2019

Last flight: Satisfaction with more specific aspects of flight (UK) – Part 2

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

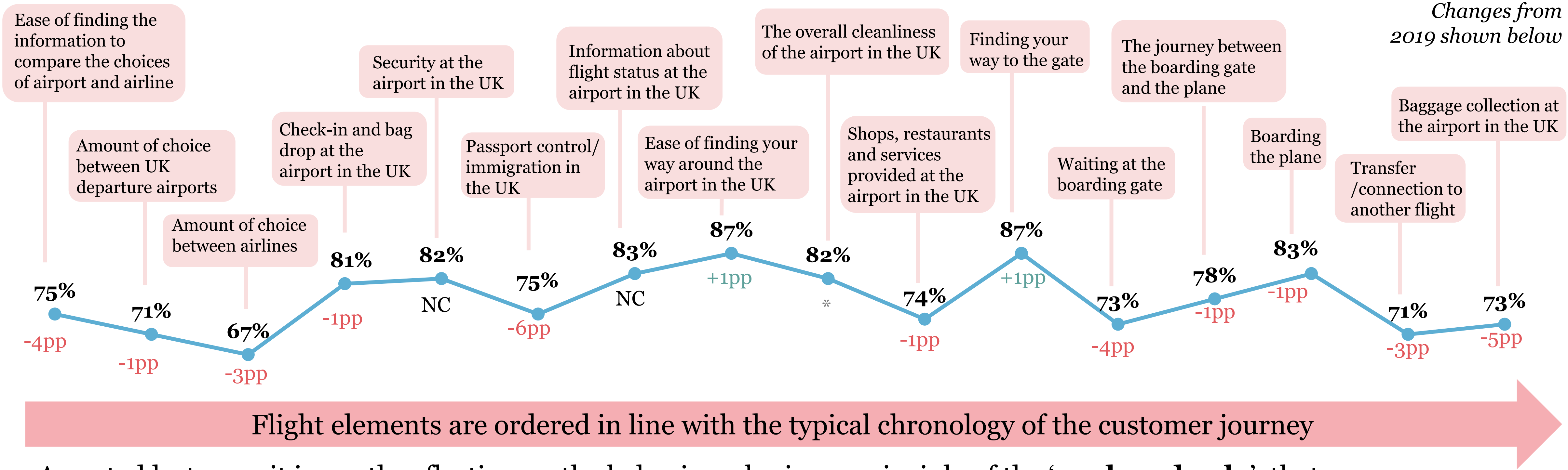


Q23. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=991-1,896).

Satisfaction has dropped across almost all points in the customer journey since 2019

Last flight: Satisfaction with airport experience

Showing NET: Satisfied
Changes from 2019 shown below



As noted last year, it is worth reflecting on the behavioural science principle of the '**peak end rule**', that consumers will judge the journey experience on its **most intense point (its peak, positive or negative), and the ending**. For the aviation industry this puts added pressure on measures (often small) that can be done to **alleviate stress at these peak points**. This can include improving communication, streamlining the in-airport experience, simplification of processes and customer care. Smoothing out these peaks can **improve general trust in airlines and the overall experience**.

Q23. 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=991-1,903). *No data available for 2019 as this was only added to the survey in 2022.

The experience of older passengers

UK Civil Aviation Authority

Savanta:

Older people are less likely to have flown recently than in previous years, and cite a much wider variety of reasons than younger people

Showing % who flew in the last 12 months by age

	Overall	18-34	35-54	55+
November 2019	57%	55%	57%	58%
October 2023	54%	65%	54%	47%
	-3pp	+10pp	-3pp	**-11pp**

The reasons given for not flying by consumers who have not made a trip by air in the last 12 months vary considerably by age. For all age groups, budget constraints are the most widely cited barrier to flying. **However, those who are 55 and over are significantly less likely to identify budget constraints as the reason for not flying recently than younger groups** (25%, vs. 39% amongst both 18–34-year-olds and 35–54-year-olds). **For older consumers, the reasons for not flying recently are much more varied.** Those who have not flown recently and are aged 55 and over are significantly more likely than their younger counterparts to cite one of the following: ongoing concern about COVID-19, concern about flight disruption, health or disability concerns making the airport experience difficult, airport queues, general dislike of airports, or a preference for other modes of transport.

Q1. When was the last time you flew from a UK airport, either to travel within the UK or to go abroad? Base: All respondents who have flown in the last 12 months, Oct-23 (n=3,510). Q5. Why have you not flown within the last 12 months/few years/never? Base: all who have not flown recently (n=1,567).

Overall satisfaction is only slightly lower amongst older passengers than younger ones in 2023, but the decline in satisfaction over time is considerably more pronounced amongst older flyers

Showing % of recent flyers who were satisfied with the overall travel experience on their last trip by air, by age

	Overall	18-34	35-54	55+
November 2019	84%	82%	83%	86%
October 2023	79%	79%	81%	78%
Change	-5pp	-3pp	-2pp	**-8pp**

Q23.17. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,903).

In 2023, those aged 55 and over are significantly more likely than younger passengers to be satisfied with the booking process, but the opposite is true of airport experience and complaints handling

Older recent flyers are significantly *more* likely to be satisfied with…

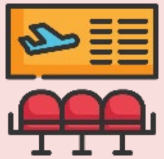
The process of booking the flight

9 in 10 (89%) recent flyers aged 55+ were satisfied with this, compared to 83% of 18–34-year-olds

Deciding which flight to book

9 in 10 (87%) recent flyers aged 55+ were satisfied, compared to 79% aged 18-34 and 85% aged 35-54

Older recent flyers are significantly *less* likely to be satisfied with…



Airport experience in the UK

7 in 10 (72%) recent flyers aged 55+ were satisfied with this, compared to 78% aged 18-34 and 77% aged 35-54

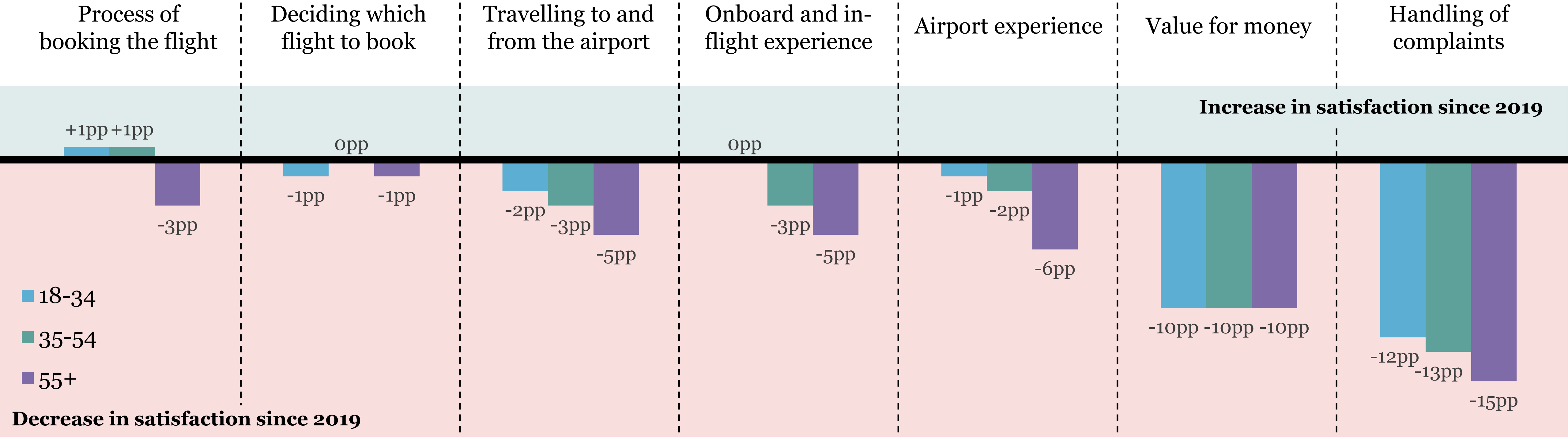
Handling of complaints

2 in 5 (42%) recent flyers aged 55+ were satisfied with this, compared to 55% aged 18-34 and 49% aged 35-54

Q22. How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months and made a complaint, excluding DK and NA responses (n= 1,006-1,900).

Since 2019, most satisfaction areas have seen a greater decline amongst those aged 55 and over than they have amongst younger flyers

Showing percentage point change in satisfaction between November 2019 and October 2023, by age



The above chart shows the direction of travel between 2019 and 2023 for each age group, across a range of satisfaction metrics. **In almost all areas, satisfaction amongst recent flyers aged 55+ has decreased by a larger amount than it has amongst younger groups. This difference is most pronounced when it comes to airport experience in the UK, meaning that this is the area in which the gap in satisfaction across age groups is widening the fastest.**

Q22. How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1,006-1,900).

Savanta:

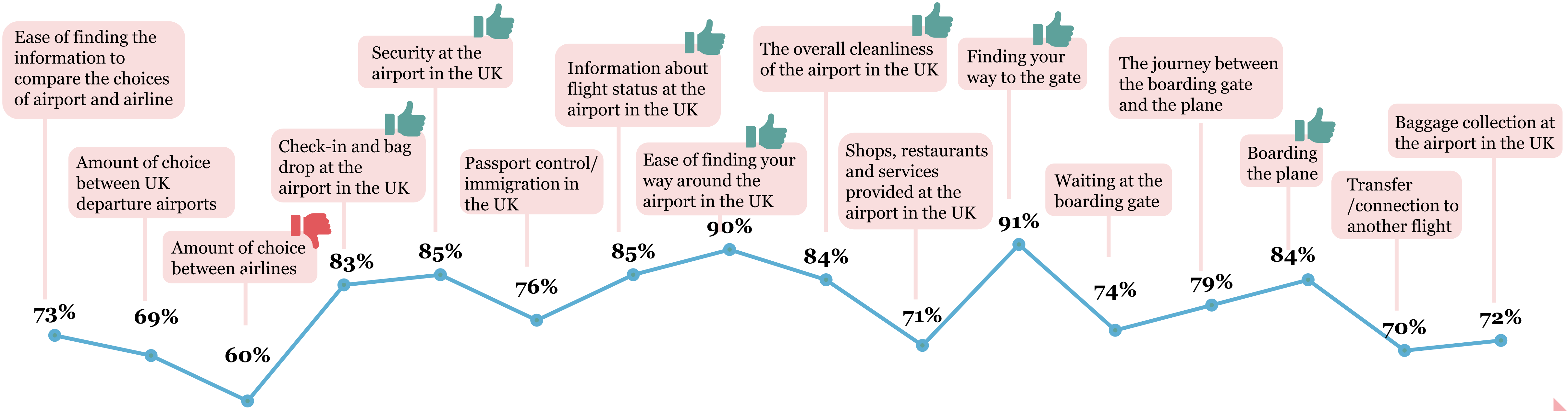
Flyers aged 55 and over are significantly more likely to be satisfied at many points in the customer journey than the youngest consumers…

At many points of the customer journey, the oldest consumers have the *highest* satisfaction levels. In line with other findings in this section, it is the *direction of travel* that is concerning. As the remainder of this section shows, satisfaction has declined more since 2019 amongst recent flyers aged 55 and over than it has amongst younger consumers.

Indicates satisfaction is significantly **higher** amongst 55+ year-olds than 18-34s*

Indicates satisfaction is significantly **lower** amongst 55+ year-olds than 18-34s *and* 35-54s*

Last flight: Satisfaction with airport experience, consumers aged 55 and over



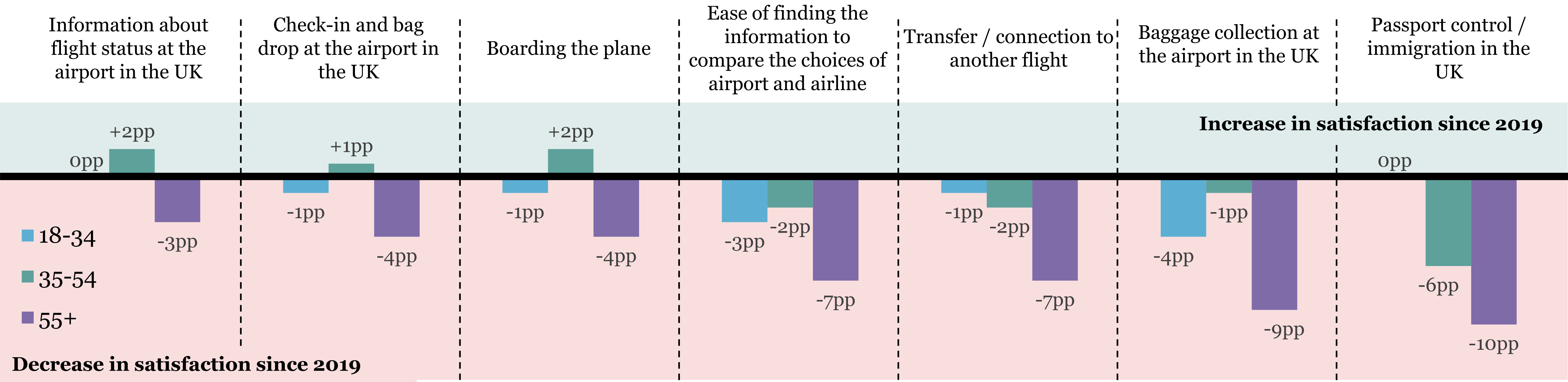
Flight elements are ordered in line with the typical chronology of the customer journey

Q23. 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=991-1,903). *No instances were recorded of satisfaction being significantly higher amongst 55+ year-olds than 35-54-year-olds.

…But the decline in satisfaction since 2019 at many of these customer journey touchpoints has been much steeper amongst older consumers

Showing percentage point change in satisfaction between November 2019 and October 2023, by age

Showing the seven touchpoints where the difference in direction of travel is most pronounced



For 12 of the 15 customer journey touchpoints tracked since 2019, satisfaction has declined by a greater amount amongst those aged 55 and over than both younger age groups. The above chart shows the instances where this difference in direction of travel is most pronounced. For example, when it comes to passport control and immigration in the UK, satisfaction amongst those aged 55 and over has declined by 10 percentage points since 2019, but has remained exactly the same as in 2019 amongst 18-34-year-olds. Baggage collection and flight connections to other flights are two other areas where older passengers' satisfaction has declined much more sharply since 2019 than younger flyers.

Q23. 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=991-1,903).

The experience of disabled passengers

UK Civil Aviation Authority

Savanta:

The gap between disabled and non-disabled consumers is growing, both in likelihood to have flown recently and in satisfaction with the travel experience

Showing % who have flown in the last 12 months and satisfaction amongst recent flyers, by disability status

Percentage-point changes since 2019 shown

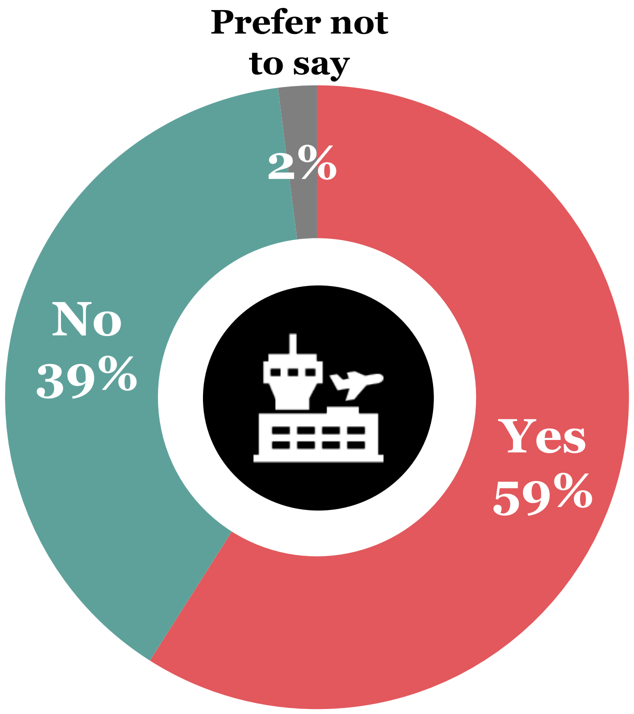
	Overall	Disability	No disability
Flown in last twelve months	54%	34%	60%
	-3pp	**-6pp**	-3pp
Satisfied with most recent trip (recent flyers only)	79%	74%	80%
	-5pp	**-8pp**	-4pp

Q1. When was the last time you flew from a UK airport, either to travel within the UK or to go abroad? Base: All respondents who have flown in the last 12 months, Oct-23 (n=3,510). Q23.17. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,903).

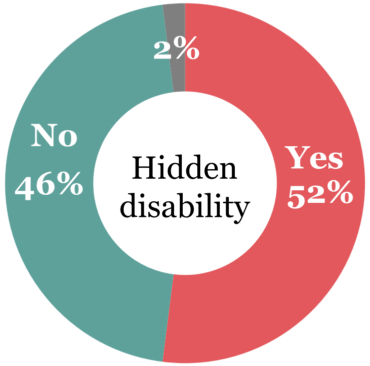
Three fifths of disabled consumers have difficulties in accessing or using airports and flying

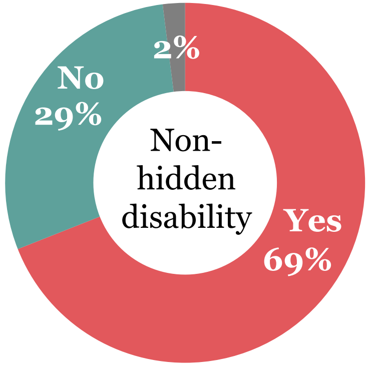
Difficulty in accessing/using airports or flying

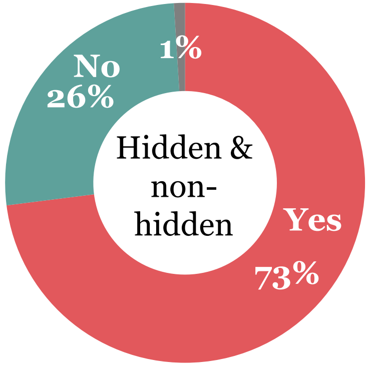
All who have a disability



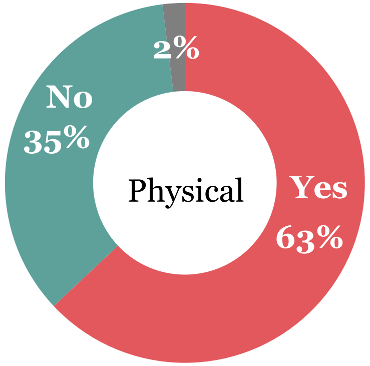
Difficulties are much more prevalent amongst consumers with non-hidden disabilities, and those with both hidden *and* non-hidden disabilities:

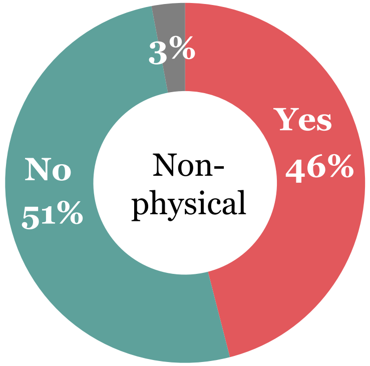


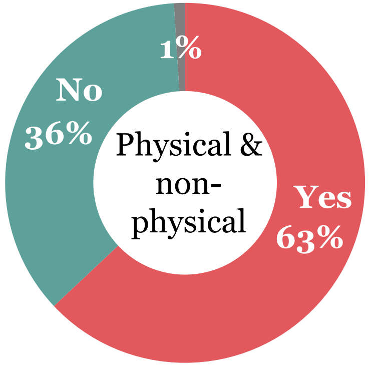




And difficulties are more prevalent amongst consumers with physical disabilities, and those with both physical *and* non-physical disabilities:



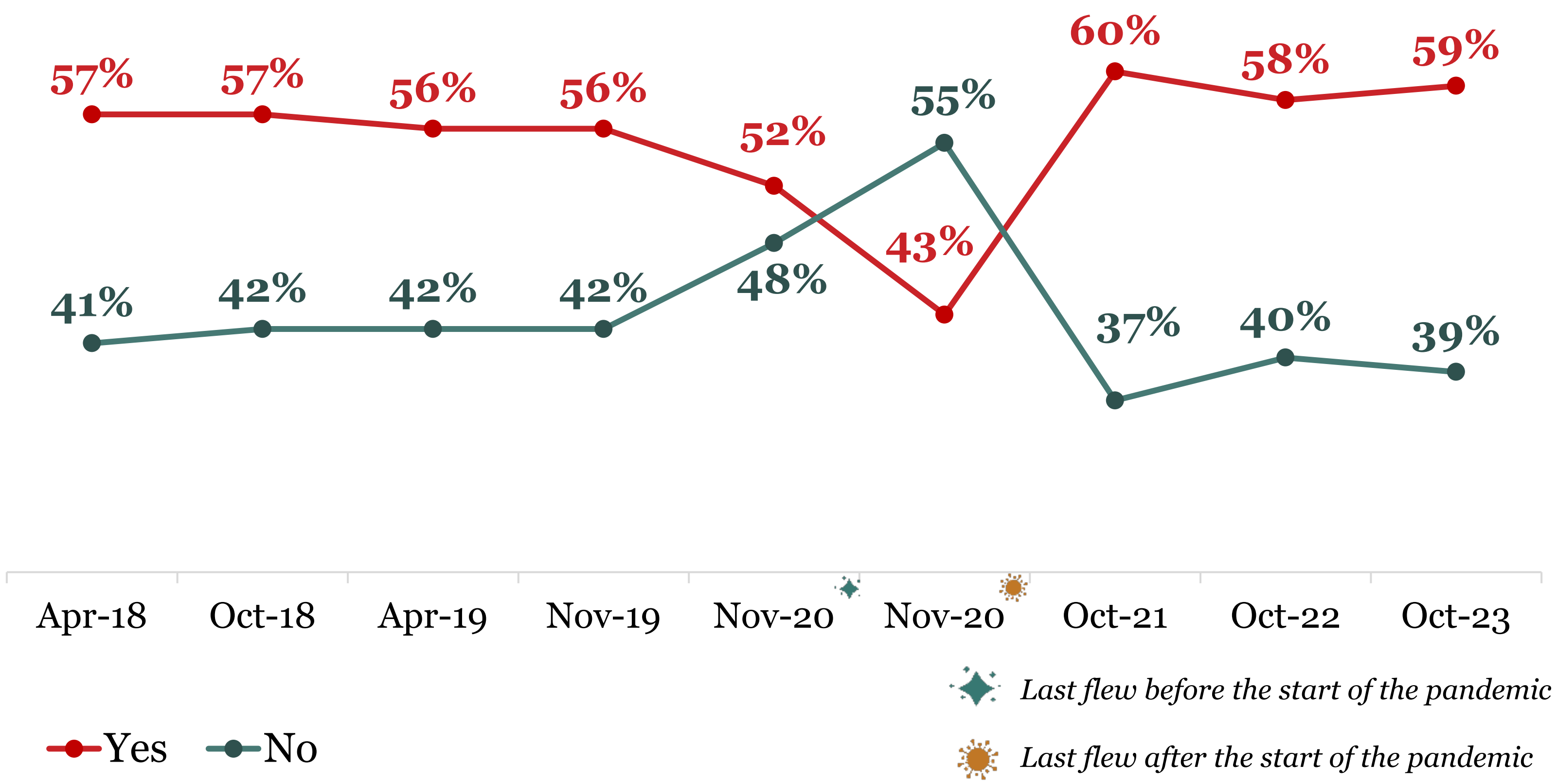




 Q7. Does/would your disability or health condition make accessing and/or using airports or flying difficult? Base: All who have a disability (n=715).

The proportion of disabled consumers experiencing this difficulty in access is only slightly higher than it was pre-pandemic

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



During the initial stages of the pandemic, far fewer disabled consumers found accessing airports and flying difficult than had been the case historically (43%). However, this did not last long – in October 2021, the proportion experiencing this difficulty rose to three fifths (60%), and it has remained at this level since. **This is slightly higher than the proportion of disabled consumers experiencing these difficulties pre-pandemic.**

However, this increase in difficulty since 2019 is fairly modest. This may suggest that difficulty in accessing airports or flying cannot fully account for the pronounced drop in satisfaction amongst disabled passengers since 2019, even if it is likely a factor.

Q7. Does/Would your disability or health condition make accessing and/or using airports or flying difficult? Base: All respondents who have a disability (October 2023 n=715).

This is not to say that the airport experience is easy for disabled passengers – in fact, it is one of several flight elements with which they are significantly less likely to be satisfied than non-disabled flyers

Disabled recent flyers are significantly less likely to be satisfied with…

	Disability	No disability
Airport experience in the UK	70%	77%
The process of booking the flight	81%	88%
Deciding which flight to book	78%	85%

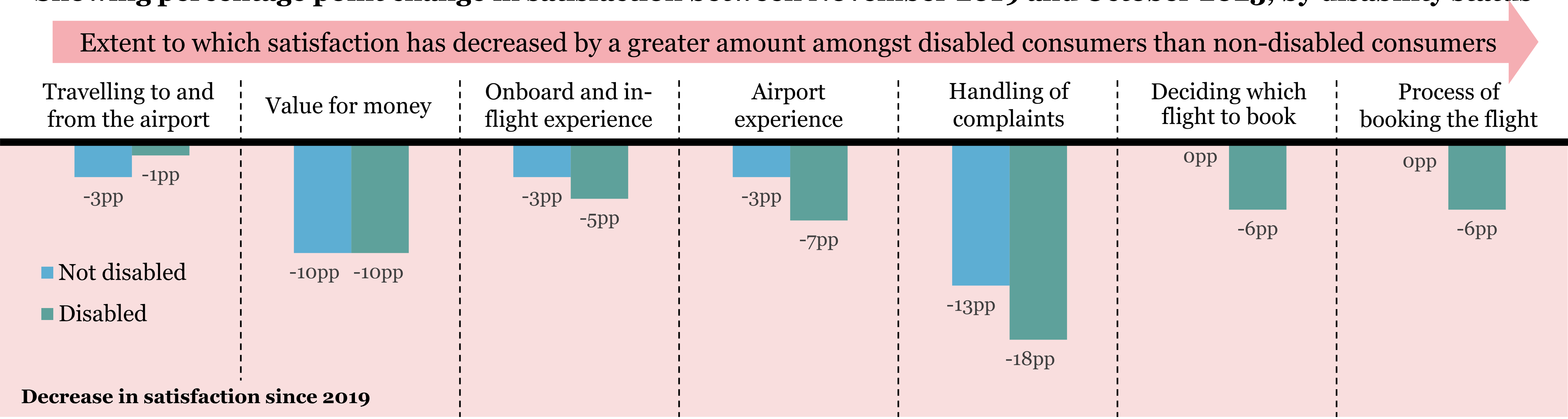
There are three satisfaction metrics which see significantly lower scores amongst disabled passengers – one concerning the airport experience, and two around booking flights.

Lower levels of satisfaction concerning booking may be due to the booking *interfaces* not being user-friendly for certain disabled users, but it may also be driven by a lack of clarity regarding the availability of necessary accommodations for their disability at the point of booking. Further research would be needed to understand the exact difficulties faced in booking.

Q22. How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1,006-1,900).

Since 2019, the gap between disabled and non-disabled passengers has widened in most satisfaction areas, with this divergence being most pronounced when it comes to booking flights and handling complaints

Showing percentage point change in satisfaction between November 2019 and October 2023, by disability status



Aside from value for money and travelling to the airport, all satisfaction areas have seen a greater decline since 2019 amongst disabled recent flyers than non-disabled flyers.

As well as being an area in which satisfaction is significantly lower amongst disabled passengers than non-disabled passengers in 2023, **booking a flight is also the area in which the gap in satisfaction between disabled and non-disabled passengers has *widened most* since 2019, closely followed by complaints handling.**

Q22. How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1,006-1,900).

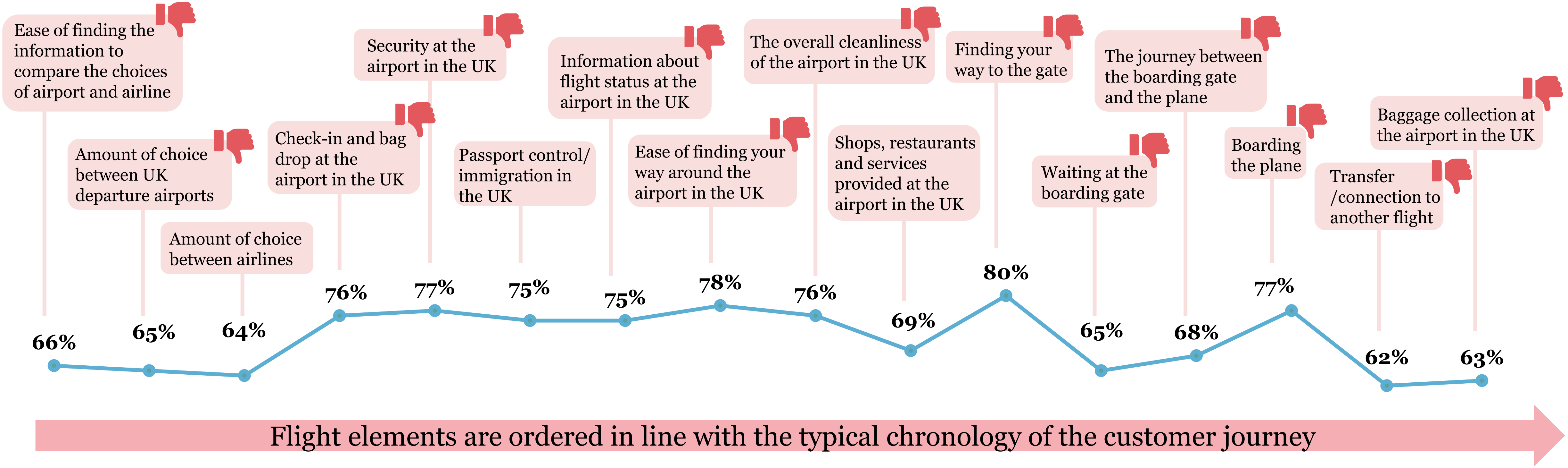
At thirteen of the sixteen customer journey touchpoints tested, disabled passengers are significantly less likely to be satisfied

For disabled flyers, the points in the customer journey which are least likely to be satisfactory are those at the beginning and end of the journey, with the points of least satisfaction being transfers or connections to other flights (62%) and baggage collection (63%). Throughout the journey, however, disabled passengers are significantly less likely to be satisfied than non-disabled passengers.

Indicates satisfaction is significantly **lower** amongst disabled passengers than non-disabled passengers

Note: no touchpoints see significantly **higher** levels of satisfaction amongst disabled passengers.

Last flight: Satisfaction with airport experience, disabled passengers

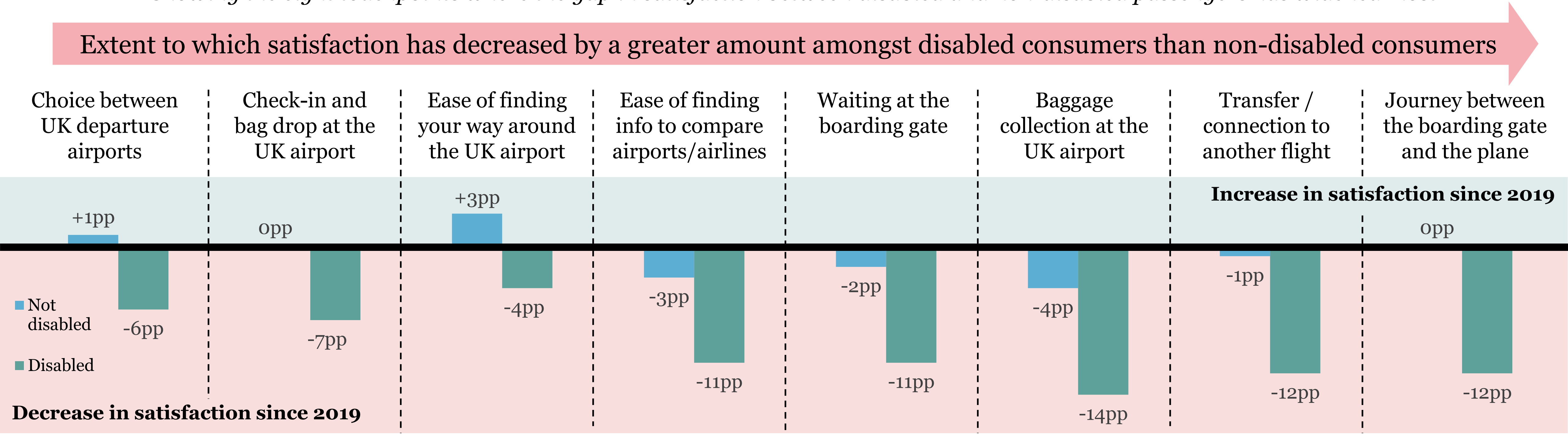


Q23. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=991-1,903). *No instances were recorded of satisfaction being significantly higher amongst 55+ year-olds than 35-54-year-olds.

Further, the gap in satisfaction between disabled passengers and non-disabled passengers has increased since 2019 at every single customer journey touchpoint tested except passport control and immigration

Showing percentage point change in satisfaction between November 2019 and October 2023, by disability status

Showing the eight touchpoints where the gap in satisfaction between disabled and non-disabled passengers has widened most



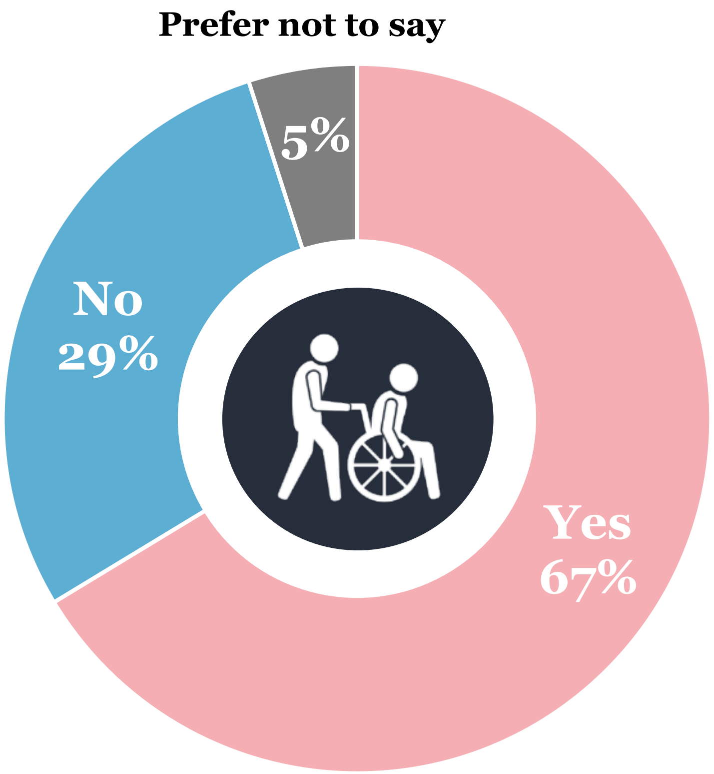
At fifteen of the sixteen touchpoints, satisfaction has decreased since 2019 by a larger amount amongst disabled flyers than non-disabled flyers. In this context, it is unsurprising that disabled consumers are less likely to be satisfied overall and are flying in fewer numbers. The above chart shows the eight touchpoints where this gap in satisfaction has widened the most, with the journey between the boarding gate and plane being the area where this is most pronounced.

Q23. 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=991-1,903).

Two thirds of disabled passengers would require assistance from the airport or airline when making a flight, and three in ten are more likely to request this assistance than they were pre-pandemic

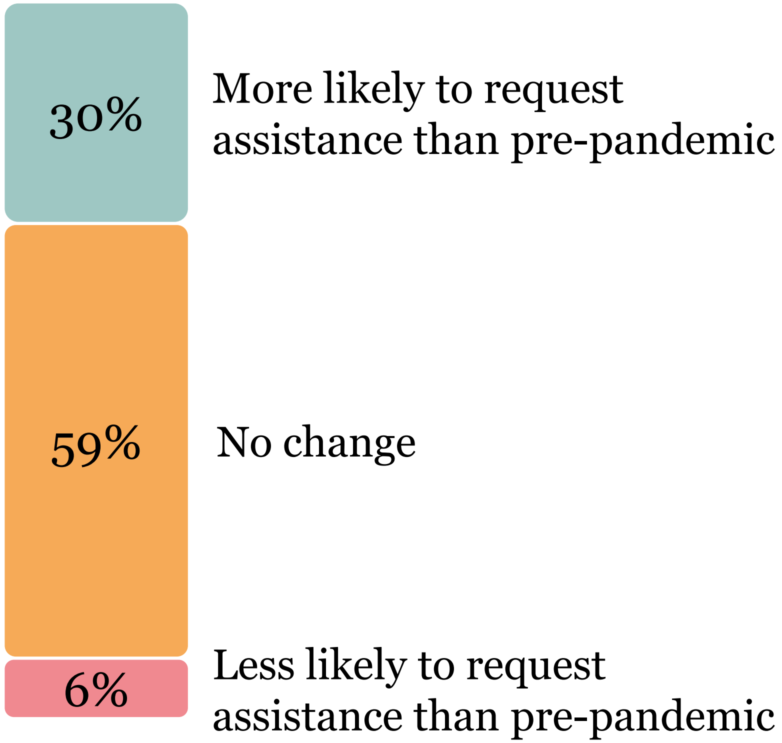
Would assistance be required?

All who have a disability which makes flying difficult



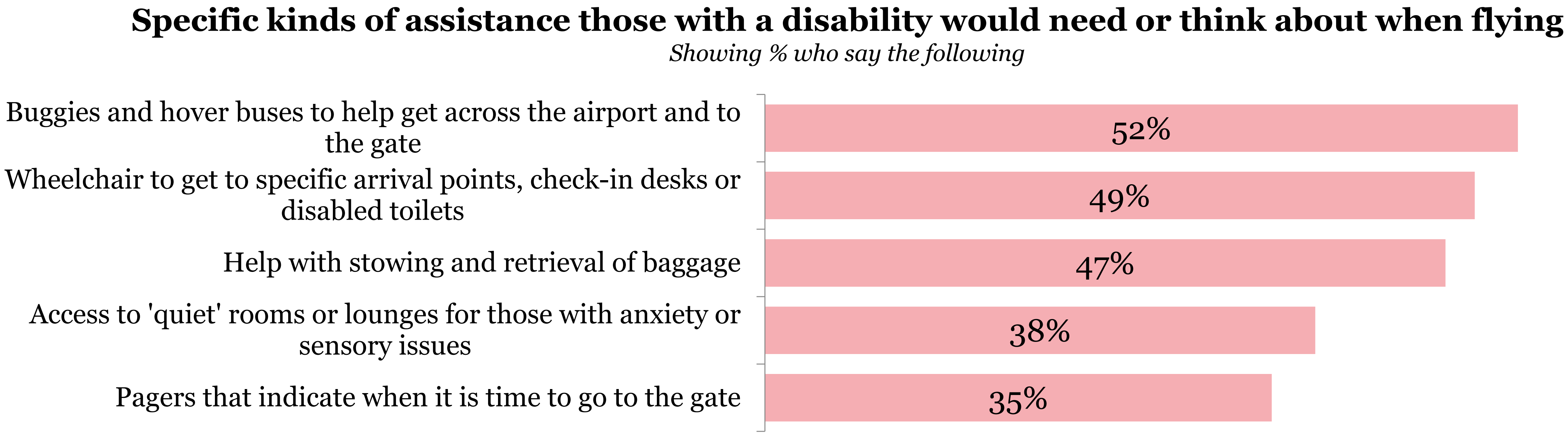
Likelihood of disabled passengers requesting assistance compared to pre-pandemic

Showing % who say the following



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 which makes airports or flying difficult (n=423). Q13. Are you more or less likely than before the COVID-19 pandemic began to request specific assistance from the airport or airline when making a flight? Base: all respondents with a disability or health condition that limits their day-to-day activities (n=715).

The assistance required by disabled passengers is most likely to relate to moving around the airport, and transporting baggage



As the customer journey chart earlier in this section shows, the two areas that disabled customers are *most likely* to be satisfied with on their most recent flight was ease of finding their way around the airport and finding their way to the gate. However, it is clear from the above figures that **they nonetheless widely need support in actually moving around the airport and getting to the gate, even if they are satisfied that they know where they need to go in relatively high numbers.**

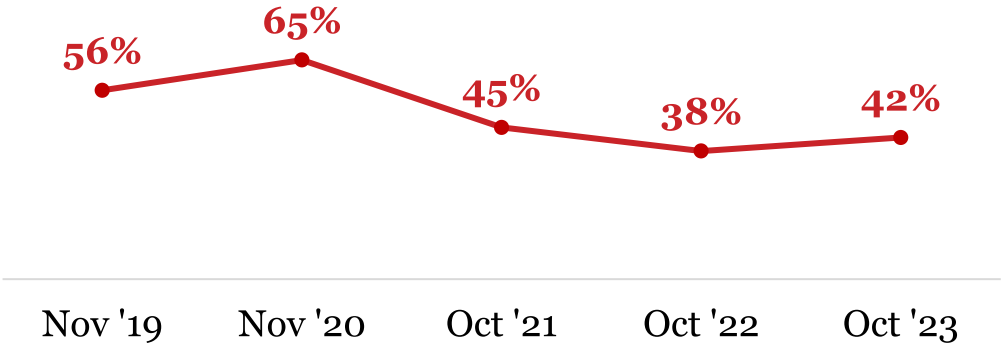
Just under half of flyers whose disability means they need assistance say that they need help with baggage. This may relate to this being one of the areas of lowest satisfaction in the customer journey for disabled passengers.

Q12. What types of specific assistance, if any, would you find helpful from the airport or airline when making a flight? Base: All respondents whose disability or health condition would mean they requested specific assistance when making a flight (n=282).

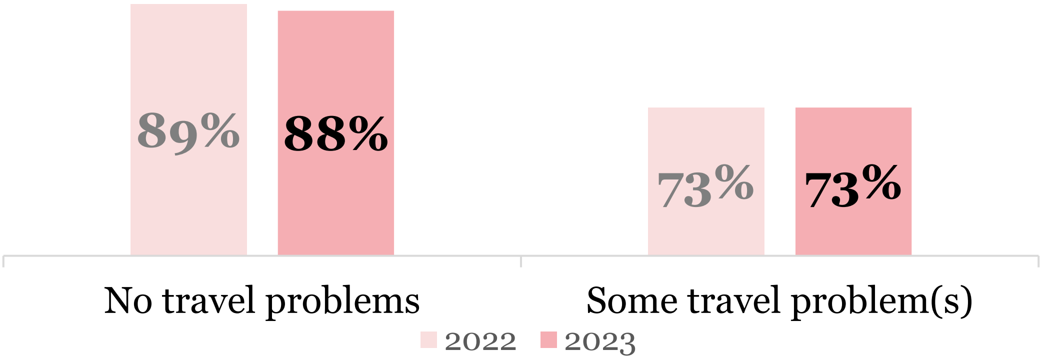
Travel disruption and complaint handling

The proportion of customers experiencing no travel problems is increasing, but is considerably lower than in 2019

Proportion of recent flyers with no travel problems



Satisfaction with the overall travel experience when there are…



There has been a slight increase in the proportion reporting no travel problems compared to last year, where a return to 'normal' travel post-pandemic saw some problems emerge such as luggage delays, and staff shortages.

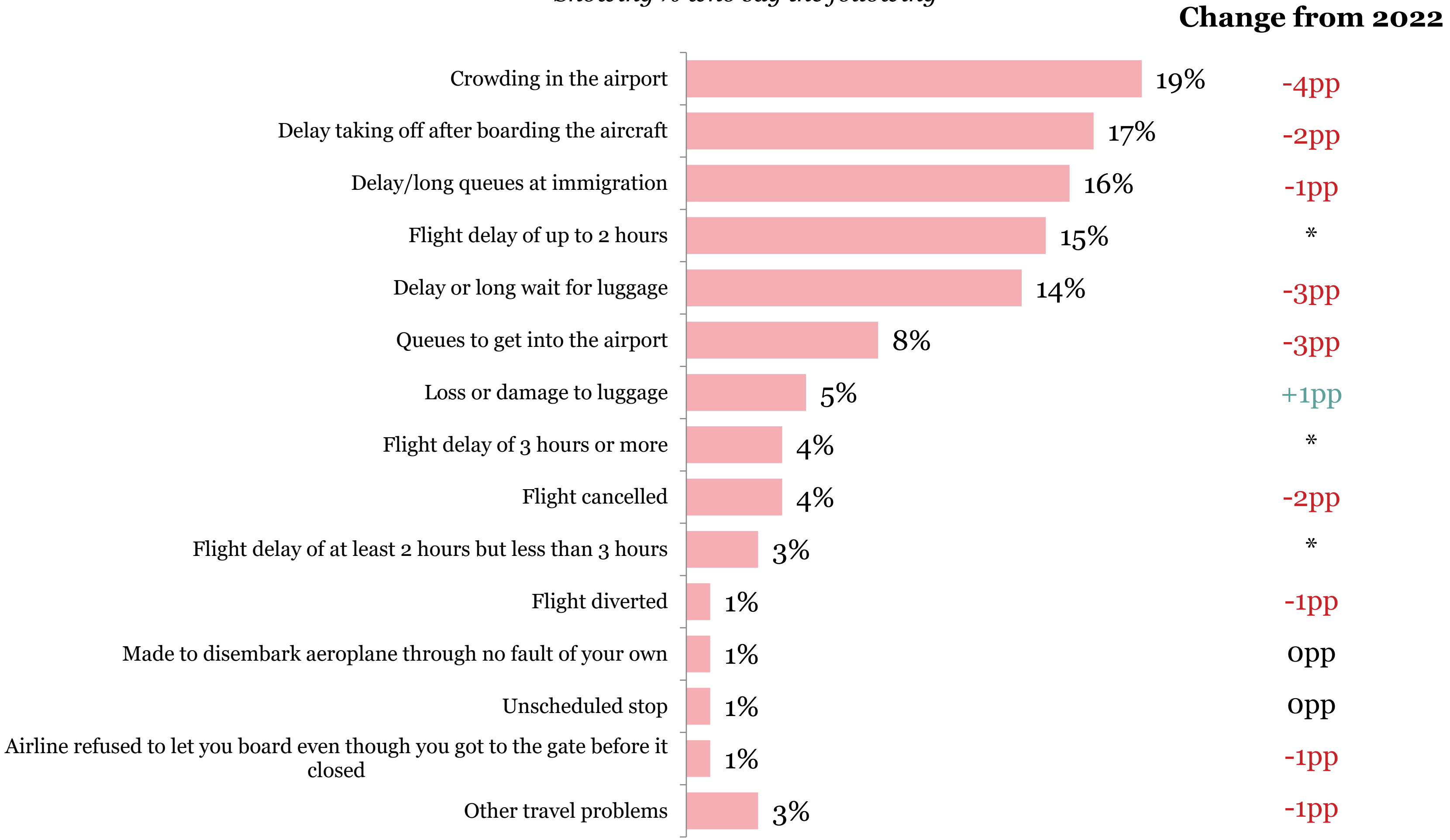
Whilst it seems there has been a slight improvement in travel disruptions, there has not been a return to the limited travel problems seen before the pandemic in 2019. This slow return to pre-pandemic levels might be due to some unforeseen circumstances seen this year such as environmental issues like the fires in Europe or the air traffic control problems experienced recently.

 Q26. During your most recent journey, did you experience any of the following issues? Base: All who have flown in the last 12 months (n=1910)

Crowding and travel related delays continue to be the most prevalent forms of disruption reported amongst recent flyers

Experience of recent flight issue(s)

Showing % who say the following



Any issue (NET): **57%**

Age
▲18-34: 67%
35-54: 56%
55+: 49%

Disability
▲PRM: 67%
Non-PRM: 56%

Departure airport
▲Luton : 69%
London City : 69%**
Bristol: 63%

This wave, flight delays were split into three options. The most prevalent form of flight delay reported is one of up to 2 hours, which 15% of recent flyers experienced.

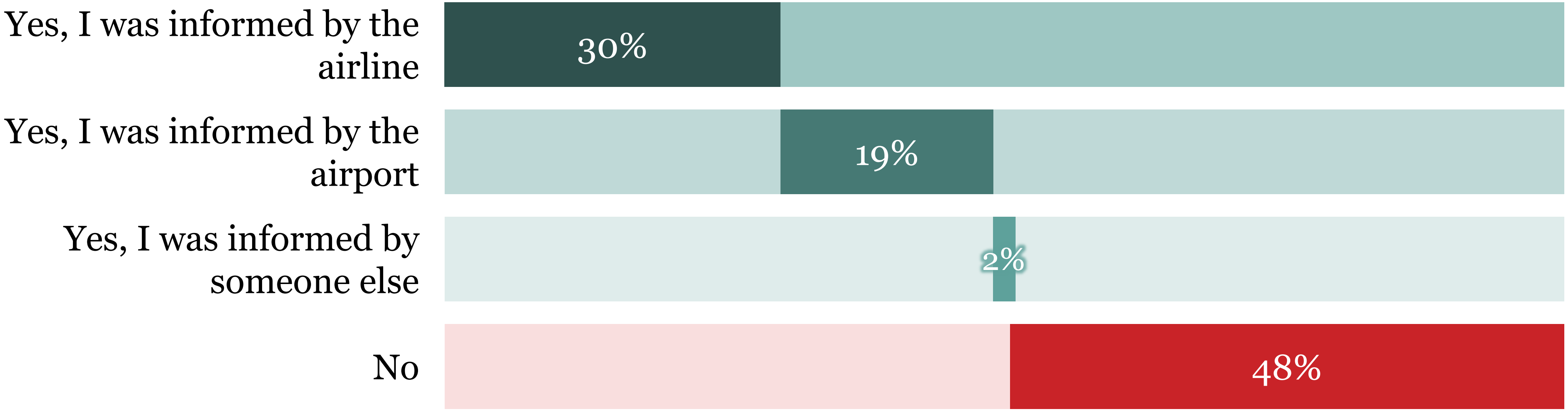
Combined, just over 1 in 5 recent (22%) passengers experienced a flight delay. This is the same proportion of recent flyers who reported a flight delay in 2022.

Q26. During your most recent journey, did you experience any of the following issues? Base: All who have flown in the last 12 months (n=1,910). *This was a new option for this wave of the survey, so tracked data is not available. **Base size <50 so should be treated with caution.

Savanta:

Of those experiencing a travel problem, almost half are not informed of the cause of their travel issue(s)

Were you informed of the cause of the issue(s) you experienced?



48% of passengers who experience a travel problem were informed about the cause of the issue(s)

The same proportion however received no information on the cause of their travel problem(s)

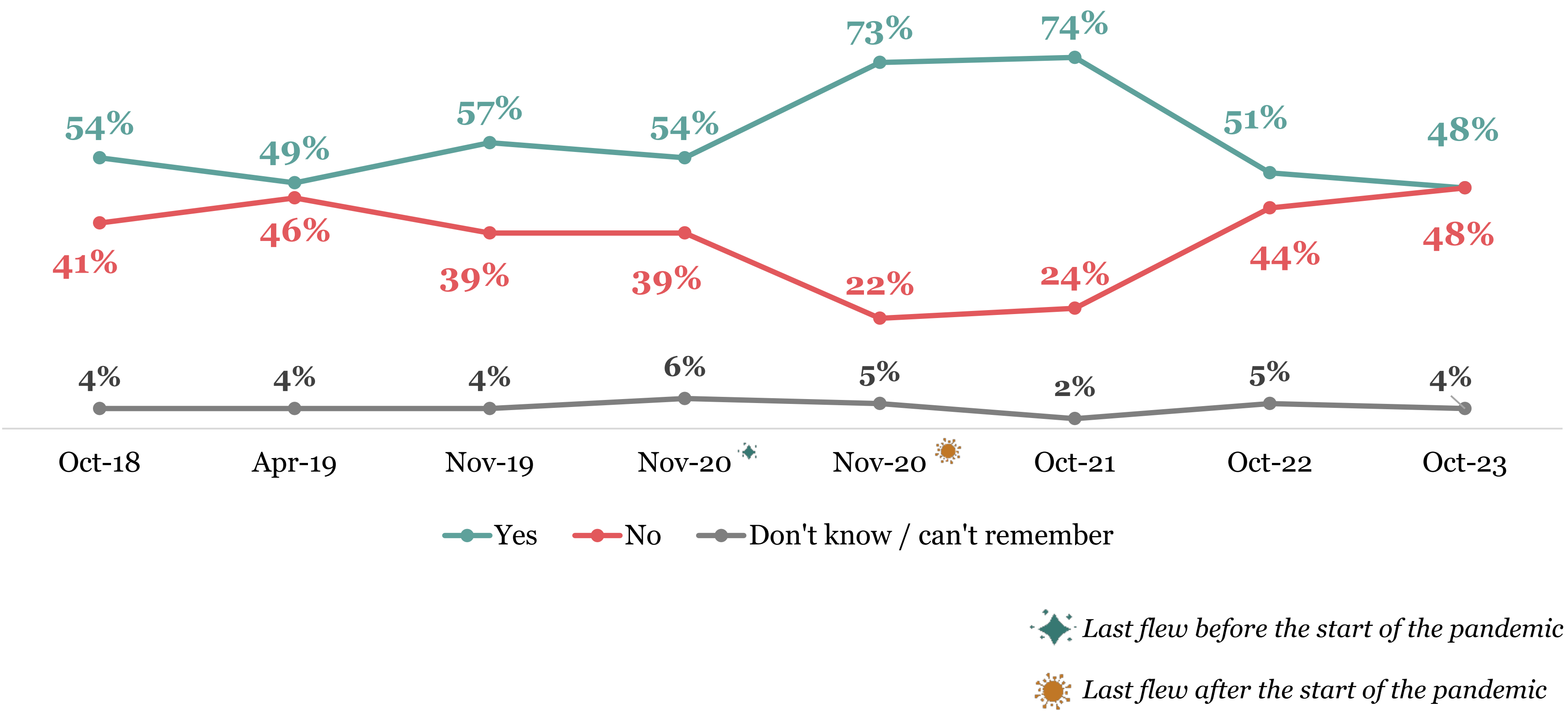
NET: Yes

18-34 year olds: 56% ▲
35-54 year olds: 48%
55+ year olds: 38%

Q27. Were you informed of the cause of the issue(s) you experienced on your most recent journey? Base: All who experiencing a travel problem (n=1096). This is a multicode question, with participants able to select more than one 'Yes' option. This is why the sum of the figures for the individual 'Yes' options is higher than the 'NET: Yes' figure. Note: those who gave any response to Q26 other than 'No travel problem' or 'Don't know/can't remember' are defined as having experienced a travel problem.

The proportion of passengers being informed of the cause their travel issue continues to decline

Receiving information on the cause of the issue(s)
All who have flown in the last 12 months and experienced travel issue(s)



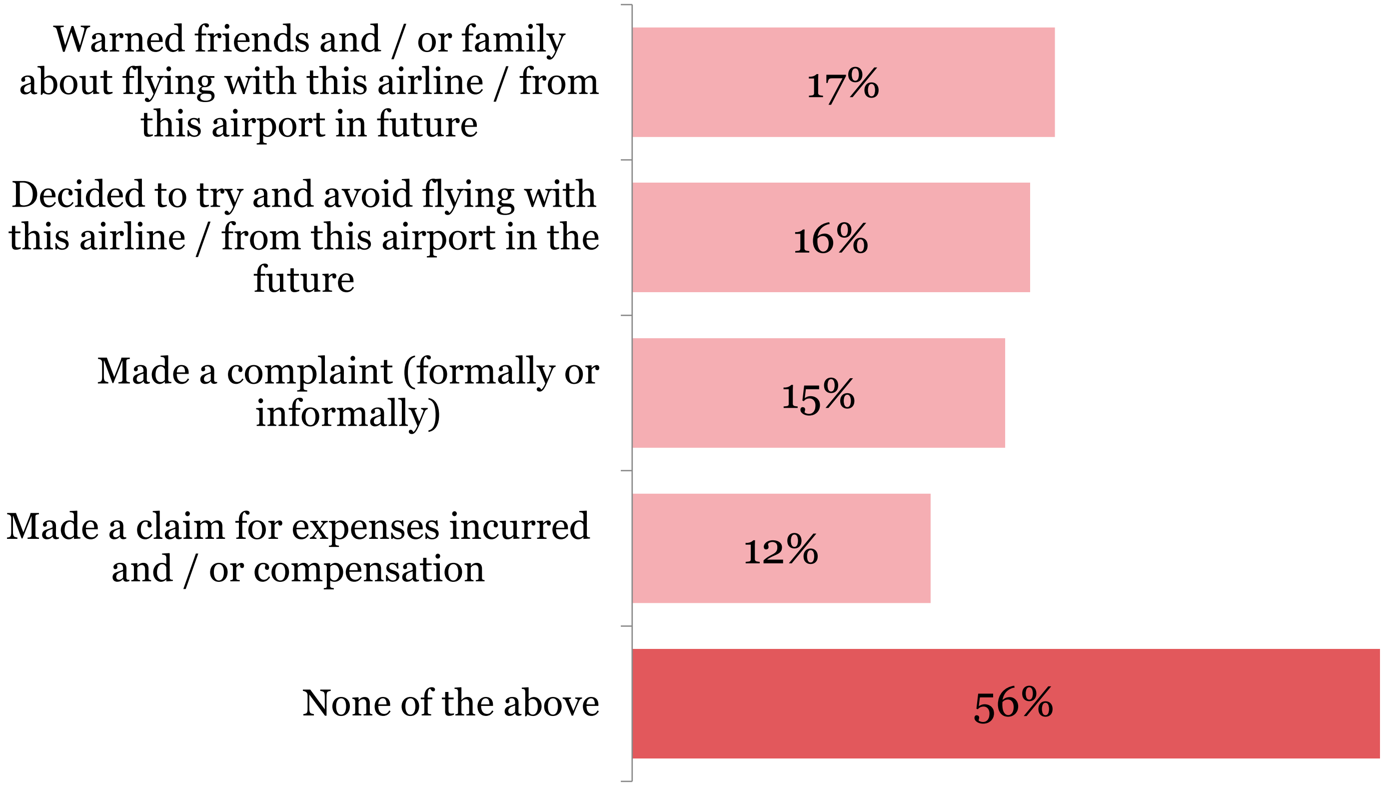
The drop in the number of passengers who were informed since last wave may in part be due to the type of travel disruption. Passengers are most likely to experience crowding, delays in taking off and delays at immigration. Such travel issues are harder to predict ahead of them occurring and are often a last-minute disruption which could explain a lack of communication. However, occurrence of travel problems like these are declining yet relaying information to passengers has not improved.

Q27. Were you informed of the cause of the issue(s) you experienced on your most recent journey? Base: All who have flown in the last 12 months and experienced a travel problem (October 2023 n=1,096). Note: those who gave any response to Q26 other than 'No travel problem' or 'Don't know/can't remember' are defined as having experienced a travel problem. *Respondents could list multiple sources, hence why responses jointly exceed 100% here.

Despite experiencing a travel problem, only a limited proportion of passengers take action as a result

Action taken after recent flight issue(s)

Showing % who took the following actions after their travel disruption



Given that consumers are already relatively dissatisfied with the amount of choice of airports and airlines, it is unsurprising that few warn friends or family against flying with a particular airport or airline in the future, as this is a measure that would further restrict choice.

Passengers who were informed of the cause of their flight problem are much more likely to take some action (52%) compared to those who were not informed (27%).

The *type* of travel problem experienced also affects passenger action, with over half of those who experienced a flight cancellation (52%) claiming for expenses and 45% making a complaint.

Q33. Which, if any, of the following did you do during or after experiencing your flight issue? Base: All who experienced a travel problem (n=1096). Note: those who gave any response to Q26 other than 'No travel problem' or 'Don't know/can't remember' are defined as having experienced a travel problem.

Whilst only a small proportion sought compensation or submitted a complaint, it is worth noting that two thirds of those who faced flight issues were not informed of their rights

67%

were not informed about their rights when they experienced an issue(s) on their most recent journey, with a further 11% unsure whether they were informed or not. Just 22% say they were informed of their rights.

Those who experienced a flight cancellation are more likely to say they were informed of their rights however, with 45% saying this (vs. 22% amongst those who faced travel issues in general).

Informed of rights after experience a flight issue

(Showing % who say the following based on age and disability splits)

	Overall	18-34	35-54	55+	PRM	Non-PRM
Informed	22%	32%	20%	10%	30%	20%
Not informed	67%	56%	69%	78%	57%	69%

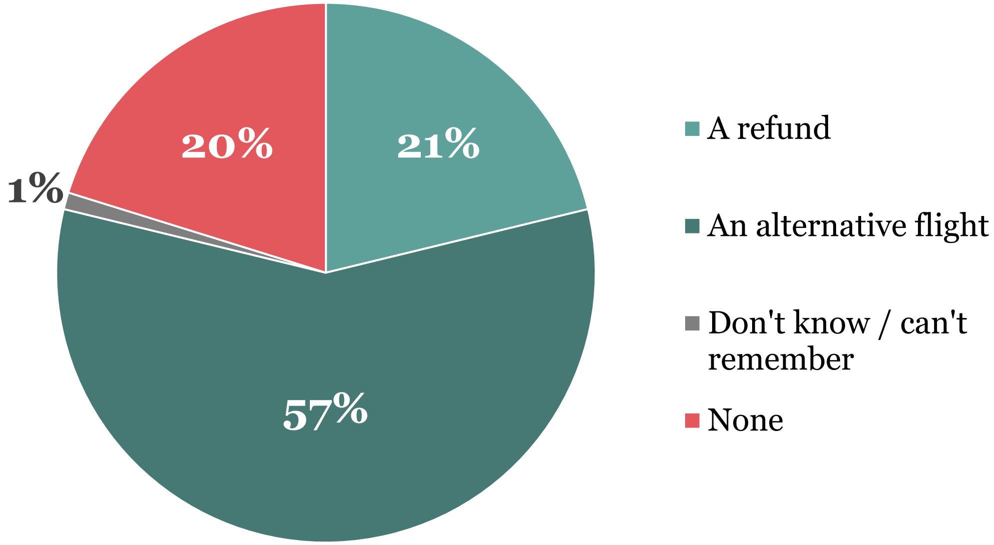
The way information is relayed to passengers might explain the gap between age groups in being informed both of their rights and their disruption. Older passengers are less likely to be informed of their rights or their travel issue and are therefore less likely to be informed enough to take action as a result of their disruption.

Q33. Which, if any, of the following did you do during or after experiencing your flight issue? Q28. And were you informed of your rights when you experienced an issue(s) on your most recent journey? Base: All who experienced a travel problem (n=1096). Note: those who gave any response to Q26 other than 'No travel problem' or 'Don't know/can't remember' are defined as having experienced a travel problem.

Four fifths of passengers experiencing a flight cancellation are offered either a refund or an alternative flight, but less than half of those experiencing a delay receive welfare or reimbursement for expenses

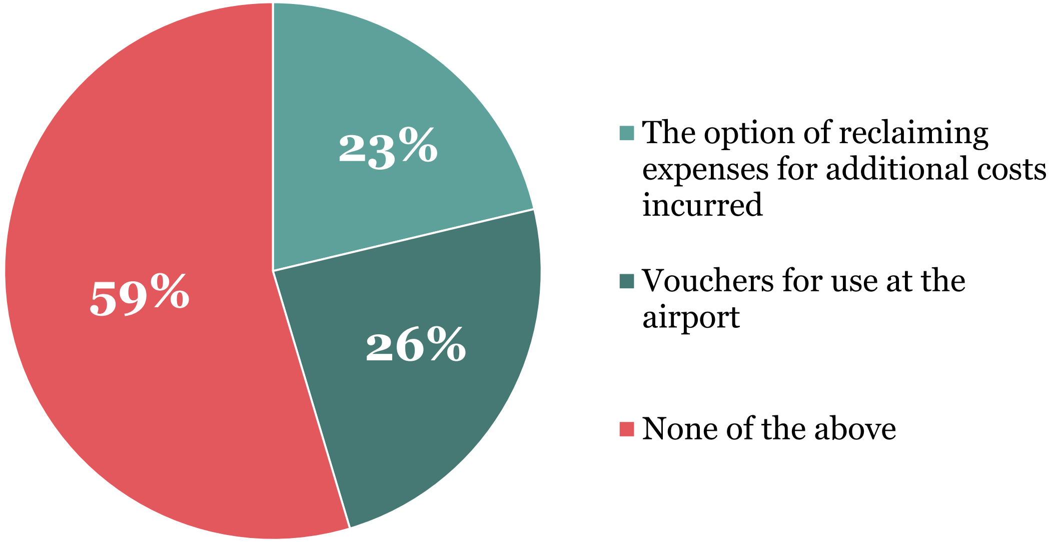
Refund or alternative flight offered following cancellations and postponements

All respondents who had to postpone or cancel their flight



Care and assistance offered following delays

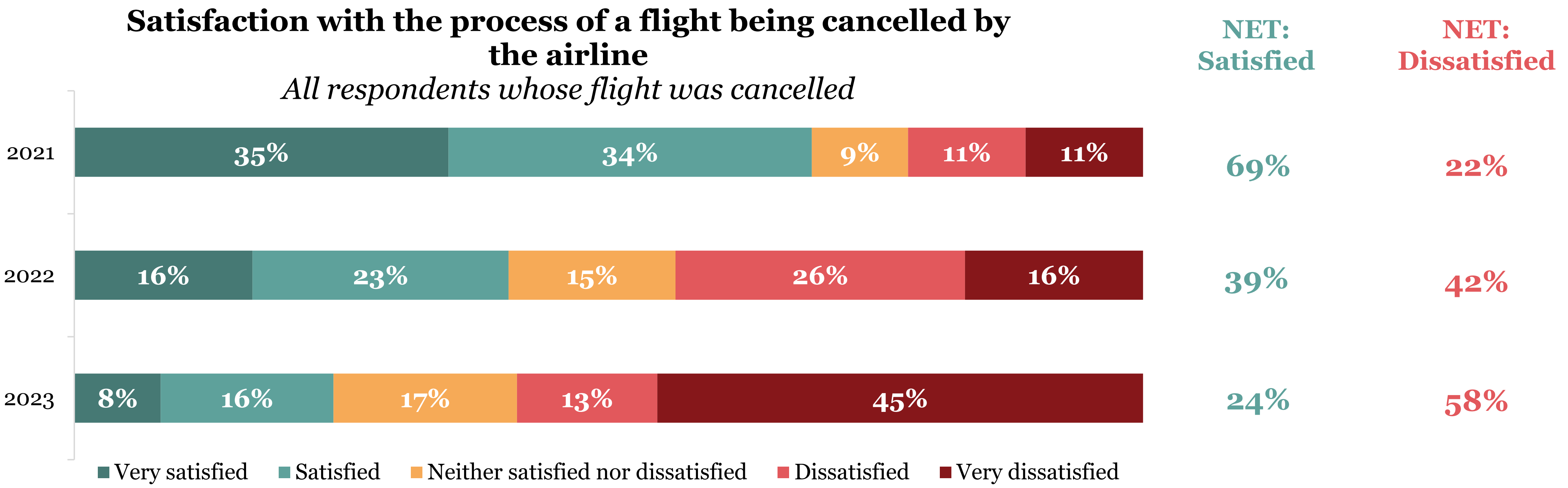
All respondents who had a flight delay of more than 2 hours



Older passengers are significantly less likely to receive any form of care and assistance after a flight delay (55+: 73% say they received neither vouchers nor the option of reclaiming expenses, vs. 45% amongst 18-34-year-olds). This age group are also less likely to be informed of their rights, highlighting the need for more accessible information on what passengers are entitled to when experiencing travel issues.

Q31. And when your flight was cancelled on your most recent journey, were you offered the choice of a refund or an alternative flight (either on the same or a different airline)? Base: All who experienced a flight cancellation (n=75). Q32. When your flight was delayed on your most recent journey, were you provided with welfare, such as vouchers for use at the airport, or the option of reclaiming expenses for additional costs incurred? Base: All who experienced a flight delay of more than 2 hours (n=136).

There continues to be a decline in passenger satisfaction with the process of their flight being cancelled by the airline



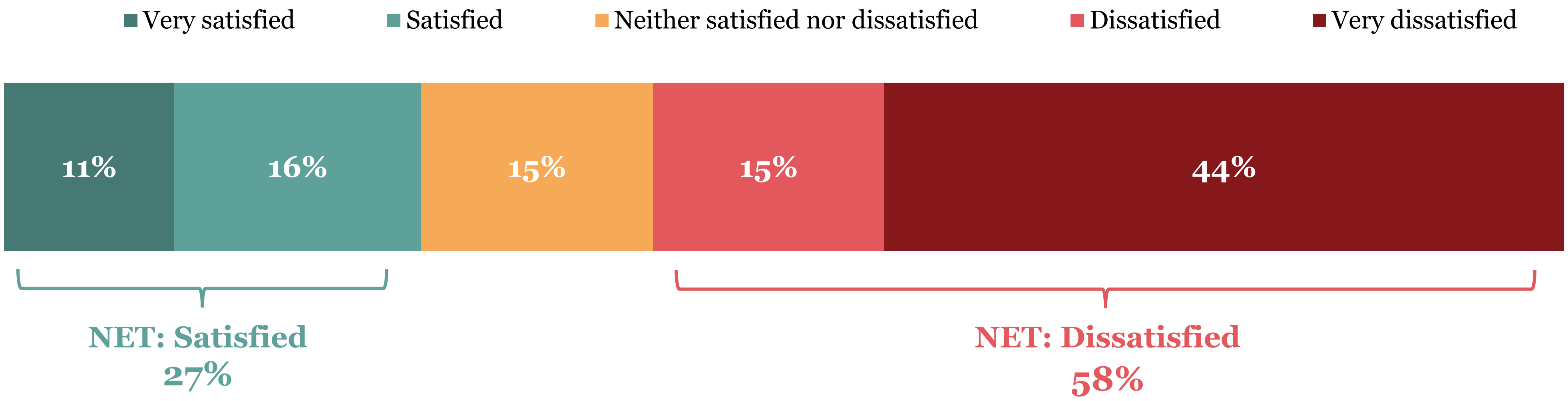
The proportion of passengers experiencing a cancellation on their most recent trip has fallen since October 2022 (from 7% to 4% this wave). However, satisfaction **with the process of cancellation has declined too**, decreasing from 39% to 24%. The clarity of information clearly plays a role here, as dissatisfaction increases when passengers are not informed of the cause of the cancellation (81% of passengers who are not informed of this say they are dissatisfied with the cancellation process, compared to 42% of those who are informed). Older passengers are also more likely to be dissatisfied with the process of their flight being cancelled (84% vs. 48% for 18–34-year-olds*).

Q29. How satisfied, or dissatisfied, were you with the process of your flight being cancelled by the airline? Base: All who have flown in the last 12 months and experienced a flight cancellation (n=75). *Relatively low base size, interpret with caution.

Similarly, satisfaction with the airline's communication in the event of a flight cancellation is low amongst passengers

Satisfaction with the airline's communication when the airline cancels a flight

All respondents whose flight was cancelled



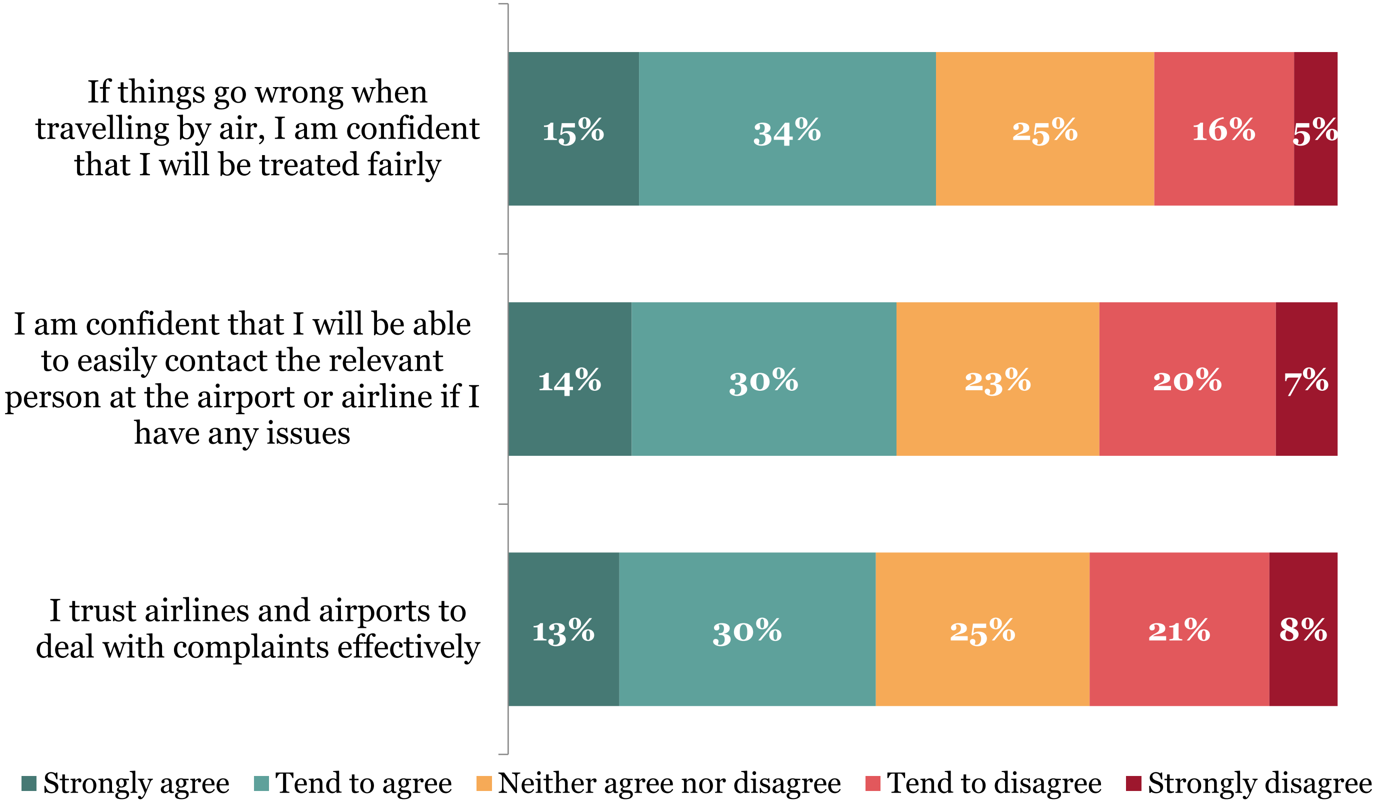
Over half of passengers who experience a cancellation are dissatisfied with how this was communicated to them via their airline. Satisfaction levels are likely impacted by not being informed by the airlines as just 39% of passengers who experienced a flight cancellation were informed of the cause of their travel problem by the airline, meaning a large proportion either found out information through other means or were not informed about their problem at all. Airlines providing information to their passengers increases satisfaction, as 34% of those who were informed of the cause of their travel issue by their airline were satisfied with the communication levels compared to 16% of those who were not informed of their problem at all.

Q30. How satisfied, or dissatisfied, were you with the communication provided by the airline when your flight was cancelled? Base: All who have flown in the last 12 months and experienced a flight cancellation (n=75). *Relatively low base size, interpret with caution.

Less than half of consumers are confident in how travel issues are handled by airlines and airports

Statements about the handling of travel issues

Showing % who say the following



NET: Agree	Change since 2022	Change since 2019
49%	0pp	-1pp
44%	0pp	*
43%	-2pp	*

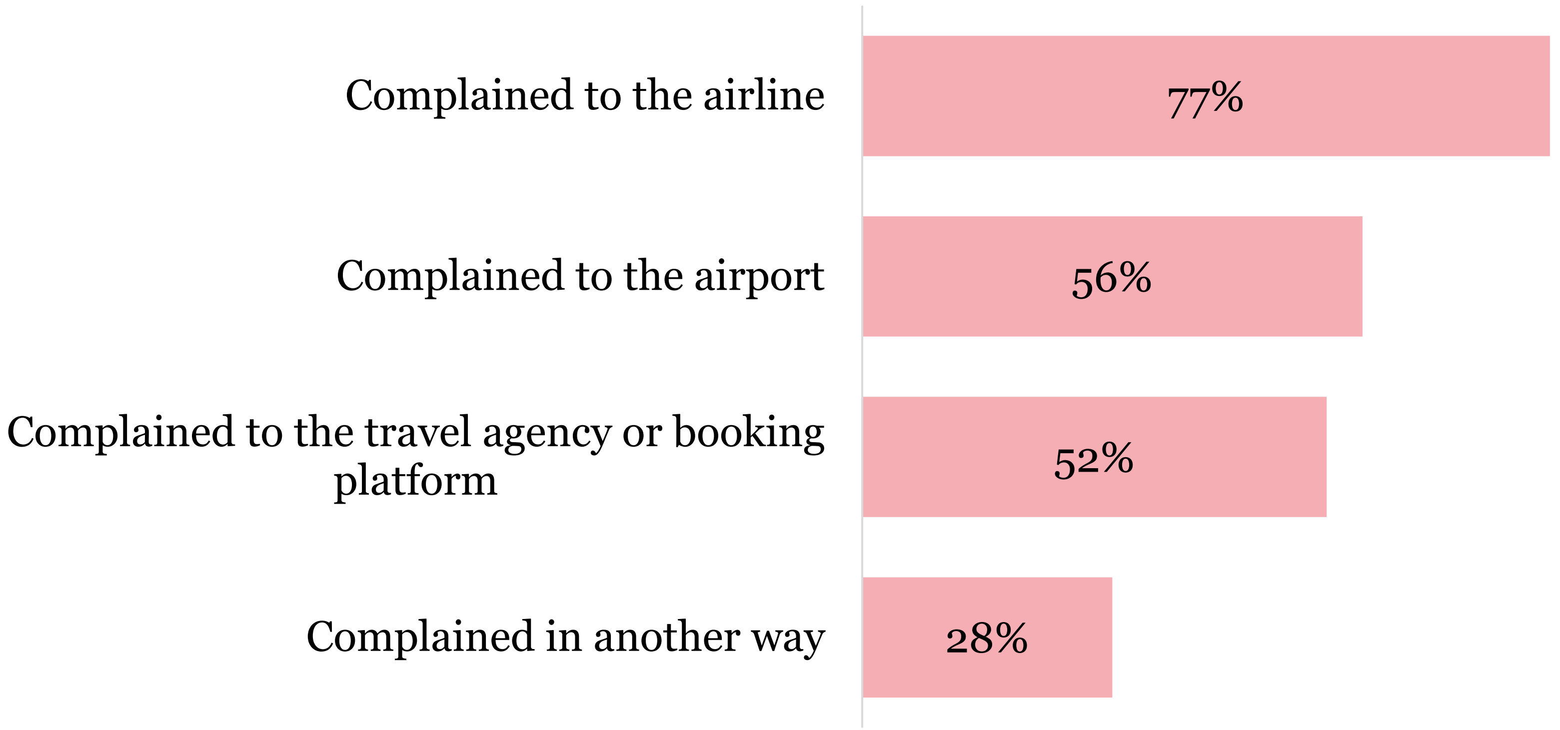
Consumers aged 55 and over are significantly less likely to agree with being confident they could contact the relevant people or trust that airlines deal will complaints effectively. **Those who are not digitally confident are significantly less likely to agree** with all three of these statements than their counterparts, perhaps suggesting that **complaint procedures and the process of dealing with travel disruptions could be made more accessible and could offer more support to these audiences.**

Q21. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3,510). *Not included in 2019 research.

Whilst the proportion of passengers who complain is low, those that do complain tend to direct their complaint towards the airline

Complaints made after recent flight issue(s)

Showing % who took the following actions after their travel disruption



Only a small proportion of consumers direct their dissatisfaction with how their travel issue was handled by making a complaint. But of those that do complain, **most complain to the airline, therefore suggesting they see their travel issue as the responsibility of the airline to handle.**

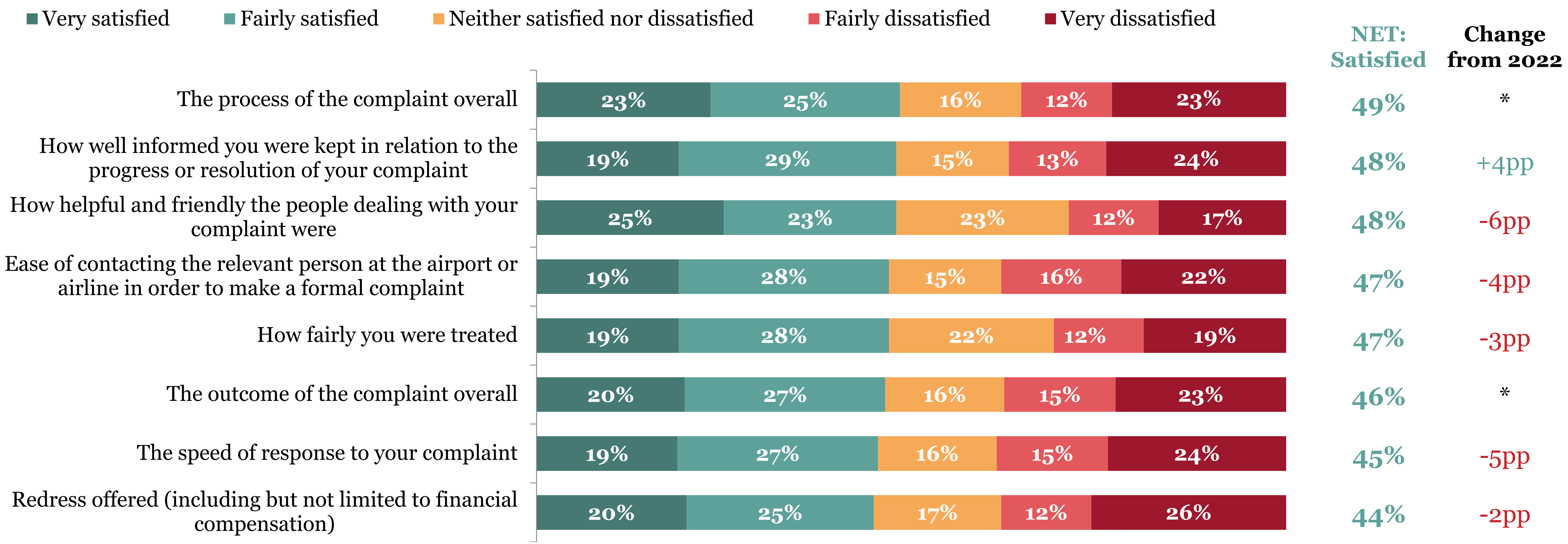
However as seen on the previous slide, **less than half (43%) trust airlines to handle complaints effectively.**

Q34. How did you make a complaint? Base: All who complained about a travel problem – online only (n=133). Note: those who gave any response to Q26 other than 'No travel problem' or 'Don't know/can't remember' are defined as having experienced a travel problem.

Satisfaction with most aspects of complaint handling continues to fall, however there has been a slight improvement in communication of complaint progress

Satisfaction with how complaints were handled

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



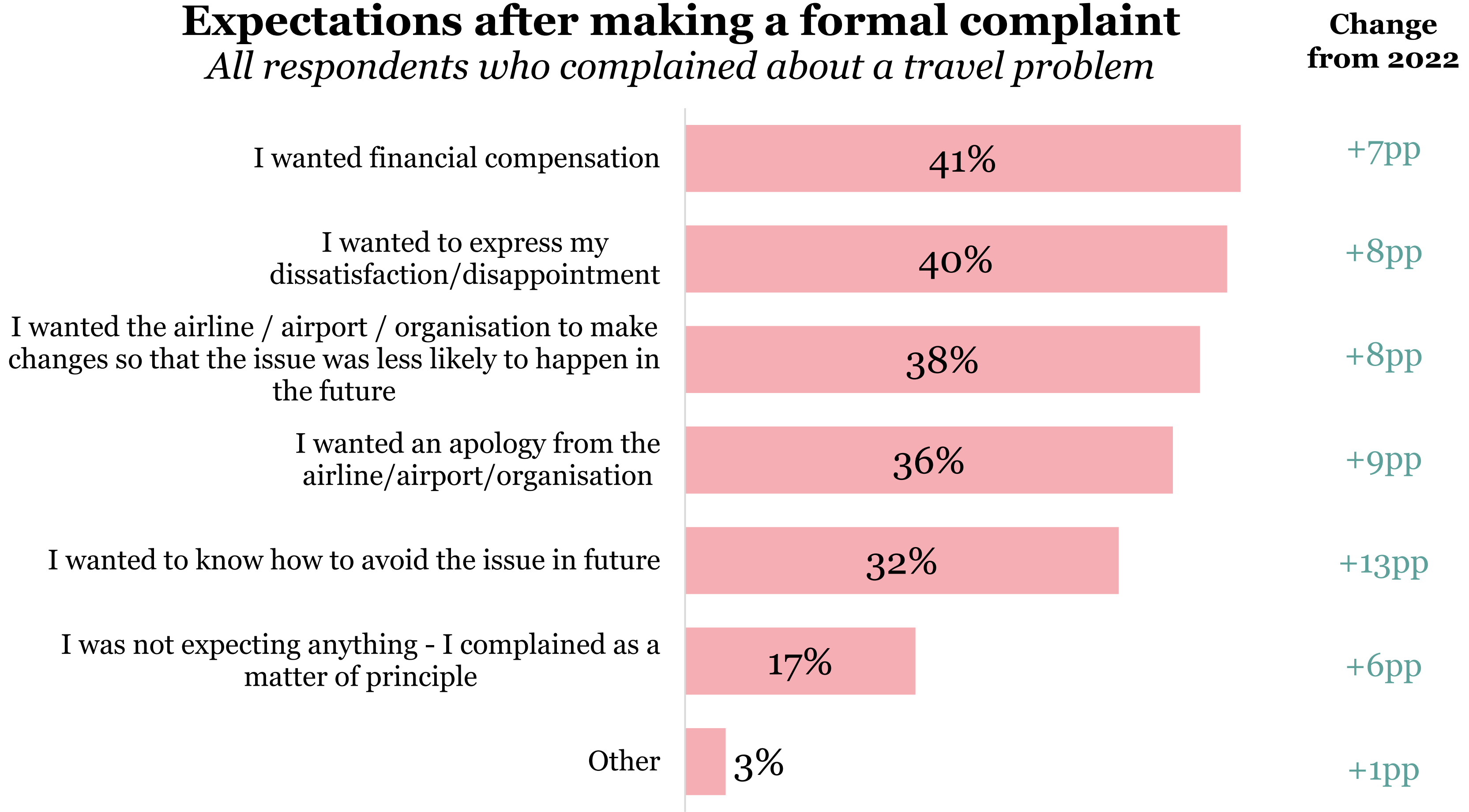
Q35. Thinking more specifically about any complaints you made about the travel issue, how satisfied or dissatisfied were you with each of the following aspects?
Base: All who have flown in the last 12 months and made a complaint about a travel issue(s) excluding 'Not applicable' and 'Don't know' responses (n=147-155).
*New statement for this wave, so no tracked data available.

Savanta:

Passenger expectations of complaint outcomes are increasing

Expectations after making a formal complaint

All respondents who complained about a travel problem



Those aged 55 and over are much more likely to be expecting financial compensation (61%) and to want to express dissatisfaction (58%).

This could in part be due to **older age groups now being less satisfied with the value for money of their flight,** and therefore they are more likely to seek compensation when things are not as expected.

Q36. What, if anything, were you expecting when making a formal complaint?Base: all who complained about a travel problem (n=162). Note: those who gave any response to Q26 other than 'No travel problem' or 'Don't know/can't remember' are defined as having experienced a travel problem.

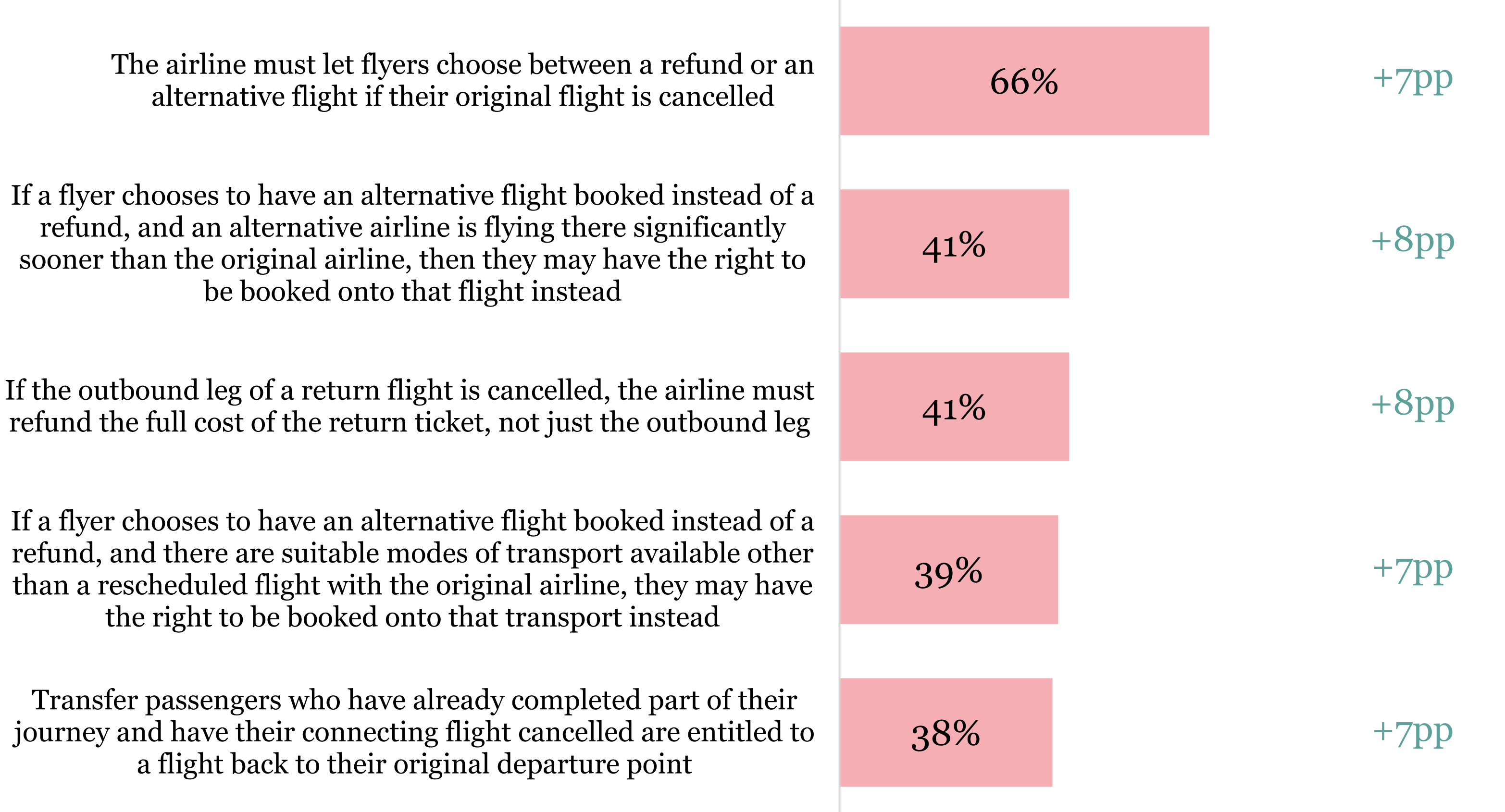
Savanta:

The majority are aware of the right to a refund or alternative flight in the case of cancellation, but awareness of more specific rights is lower

Awareness of rights under UK law when a flight is cancelled

All respondents (showing % who say they are aware)

Change from 2022



Older passengers are significantly more likely than their younger counterparts to be aware that airlines must offer a refund or alternative flight when there is a cancellation (70%), whereas younger passengers are more likely to be aware that transfer passengers are entitled to a flight back to their original departure point if their second leg is cancelled.

Passengers with low digital confidence are less likely to be aware of all passenger rights compared to others.

PRM and non-PRM passengers are equally aware of all rights.

Q37. Under UK law, if a flight is cancelled, the airline must let flyers choose between two options – either a refund on all parts of the ticket that have not been used, or an alternative flight. Please indicate if you were aware or unaware of the following before today. Base: all respondents who answered this question (n=3,026).

ATOL protection

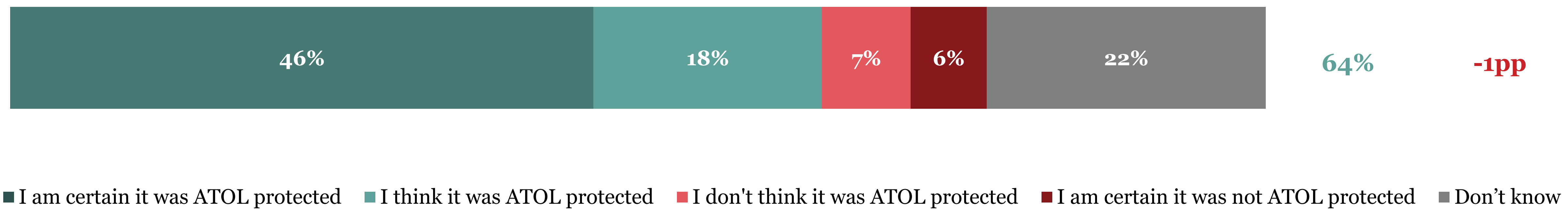
As in 2022, almost two-thirds of respondents believe their last holiday was ATOL protected

Was your last holiday ATOL protected?

All respondents

NET: ATOL protected

Change since 2022

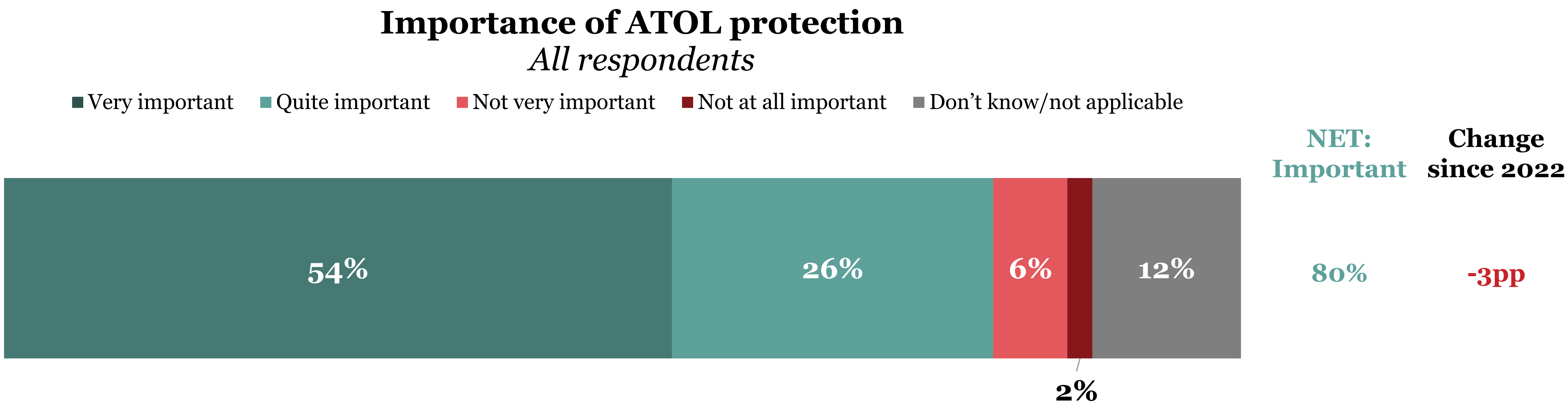


Consumers aged 18-34 are significantly more likely to say they think or are certain that their last holiday was *not* ATOL protected than older groups (18% vs. 13% amongst 35-54s and 11% amongst those aged 55 and over). Younger consumers are also significantly more likely to say that they don’t know whether their holiday was ATOL protected or not (27% vs. 22% 35-54s and 20% 55+)

Those who are not digitally confident are significantly more likely to not know whether their holiday was ATOL protected or not (33% vs. 22% amongst those who are confident).

Q38. Was your last holiday ATOL protected? Base: all respondents (n=3,510).

The majority of consumers continue to think that it is important that their holiday is ATOL protected



Those who are not digitally confident are also more likely to **not know** whether they find ATOL protection important or not, suggesting a gap in knowledge amongst low digital confidence passengers (21% vs. 12% amongst those who are confident).

Age is again a dividing line here, with consumers aged 18-34 significantly **less likely** than older consumers to say that their holiday being ATOL protected is important (18-34 68% vs. 81% 35-54s and 87% 55+).

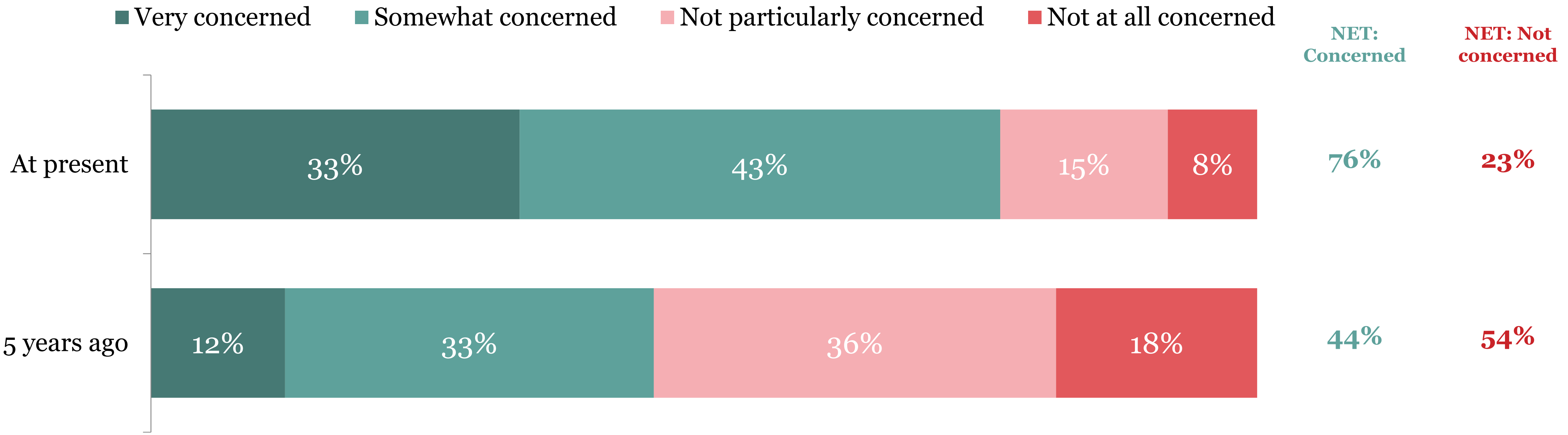
Q39. How important, if at all, is it that your holiday is ATOL protected? Base: all respondents (n=3,510).

The environment and aviation

At an overall level, most passengers say that they are concerned about the environment at present

Environmental concerns at present compared to 5 years ago

Showing % who say they are concerned about the environment and climate change



Attitudes here do not vary by age group, with all age groups similarly likely to say that they are concerned about the environment.

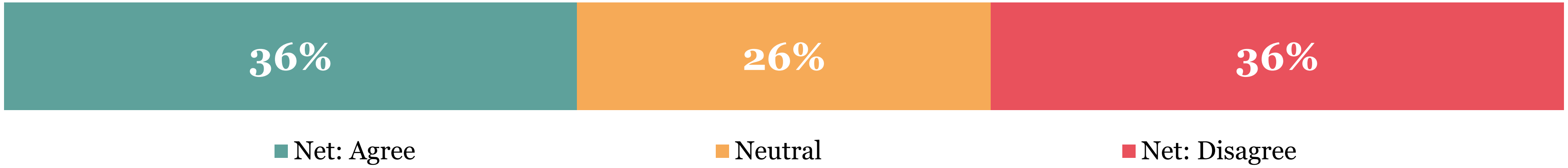
 Q40. To what extent, are you or were you concerned about the environment and climate change… Base: All respondents (n=3510).

However, only a minority are changing their travel behaviours due to environmental concerns

45% Have not flown in the last 12 months → **7%** Of non-flyers cite environmental concerns

When deciding whether to travel by air, I think about the impact of flying on the environment

Showing % who say the following



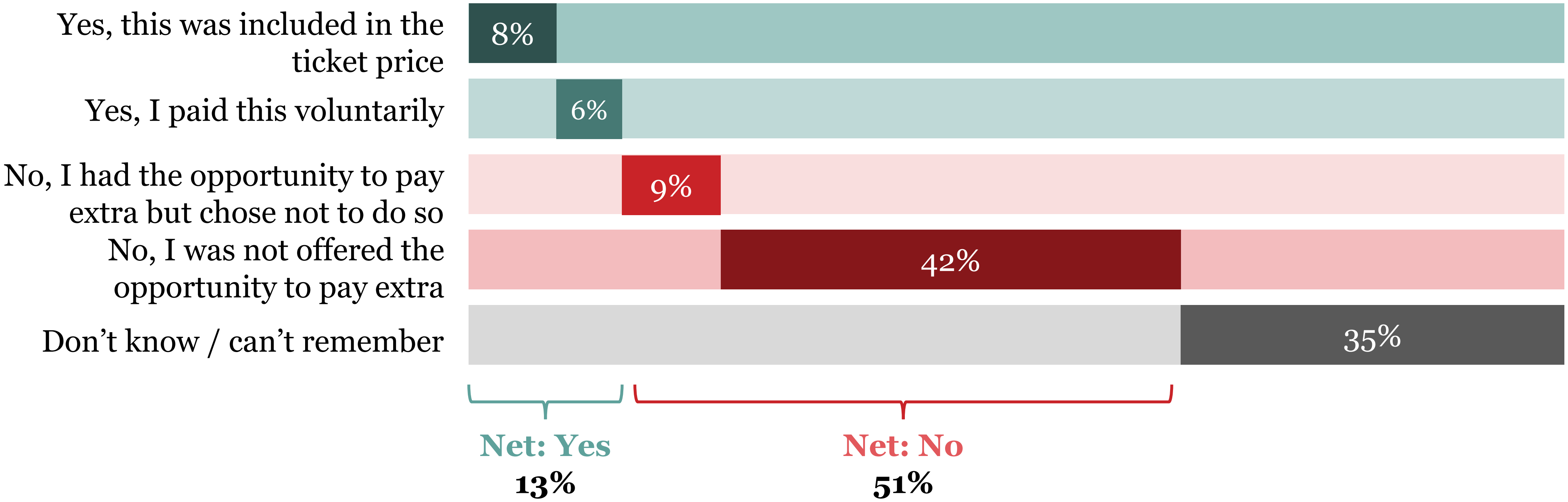
Whilst environmental concern does not vary by age, consumers aged 18-34 (38%) are more likely to consider the impact of their flight compared to those aged 55+ (34%); the flying behaviour of younger consumers is more likely to be influenced by environmental concern.

Q1. When was the last time you flew from a UK airport? Base: All respondents (n=3510). Q5. Why have you not flown within the last 12 months/few years/never? Base: All who have not flown recently (n=1567). Q21. 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=3510).

Additionally, most passengers are not paying to offset the environmental impact of their flight

Whether recent flyers paid to reduce or offset the environmental impact of their most recent flight

Showing % who say the following



Younger recent flyers are significantly more likely to have paid to reduce or offset the environmental impact of their last flight.

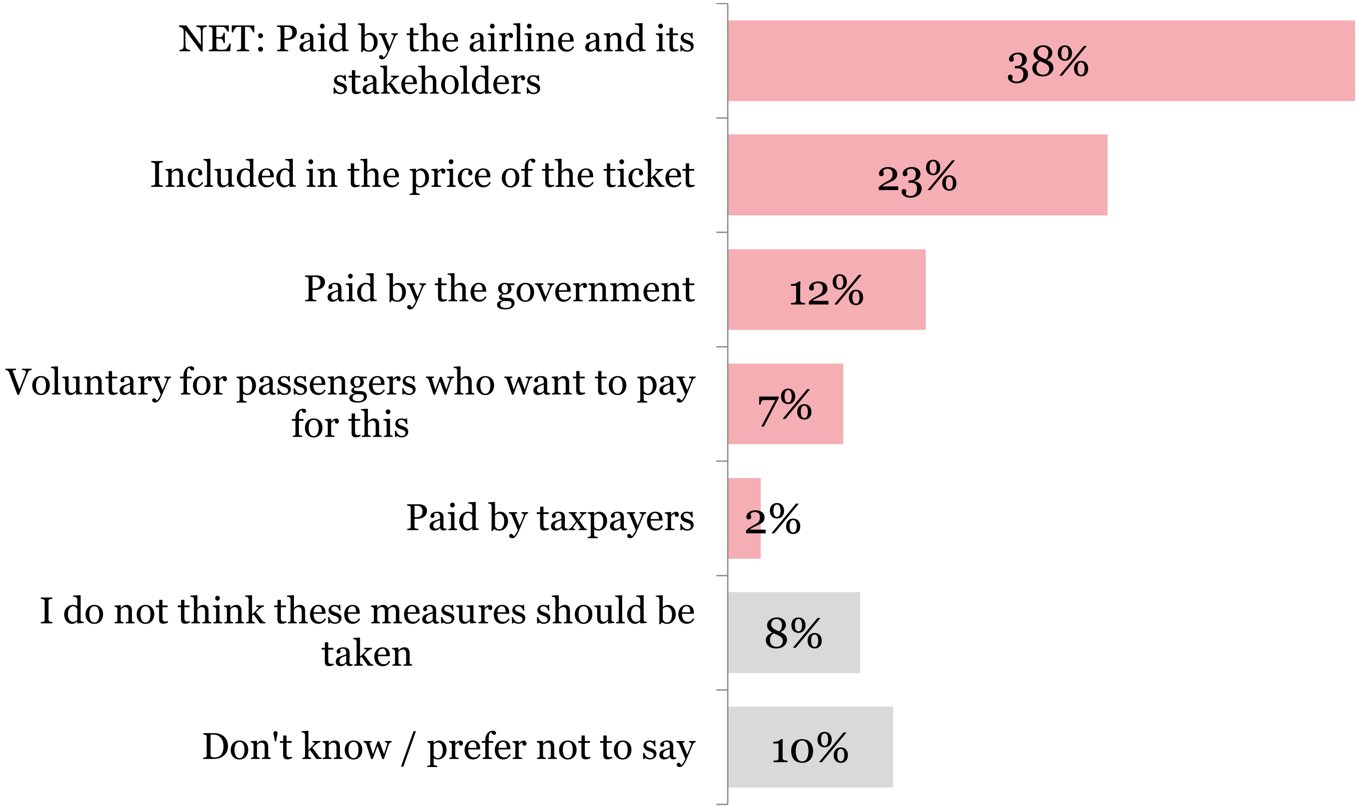
18-34 year olds: 22%
35-54 year olds: 13%
55+ year olds: 7%

 Q42. On your most recent flight, did you pay for reducing or offsetting the environmental impact of your flight? Base: All who have flown recently (n=3313).

Passengers do not, however, see alleviating the impact of aviation on the environment as their responsibility

Covering the costs of environmental measures

Showing % who say the following should cover the cost of environmental measures to reduce the impact of flying



Two fifths of consumers think airlines and their stakeholders should cover the cost of measures to reduce the environmental impact of flying (38%).

Older passengers, however, are significantly less likely to think the onus should be on airlines to pay. Consumers aged 55 and over are significantly more likely to think that environmental cost should be included in the ticket price (35%) compared to those aged 18-34 (12%) and those aged 35-54 (18%).

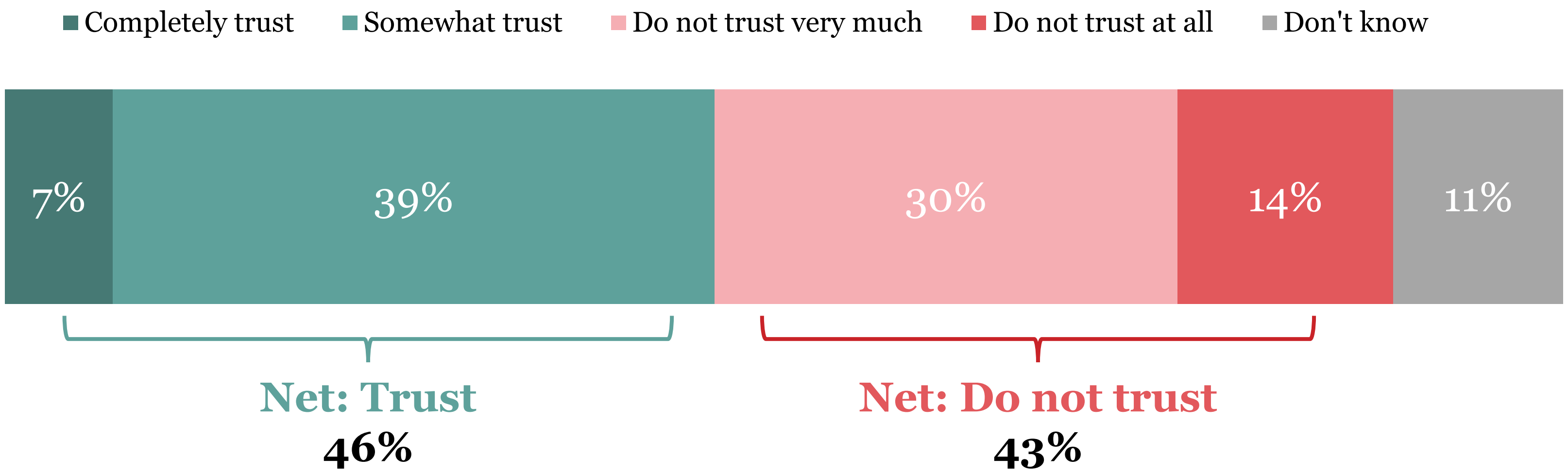
Younger passengers, on the other hand, are significantly more likely to think that the government should cover environmental offsetting measures, with four times as many consumers aged 18-34 of the view that the government should pay than those aged 55+ (21% and 5% respectively).

Q41. Airlines can take various measures to reduce the environmental impact of flying. How do you think the cost of these measures should be covered? Base: All respondents (n=3510).

The public are divided in their opinion on whether to trust that airlines are genuinely committed to reducing the environmental impact of flying

Trust in airlines' commitment to reducing environmental impacts of flying

Showing % who say the following



Age is also a dividing line when it comes to trust in the sincerity of airlines' commitment to reducing environmental impact, with 18–34-year-olds are significantly more likely to trust that airlines are genuinely committed to reducing the environmental impact of flying (49% vs. 44% for those 55+). Given that younger people are more likely to have travelled recently, they are also more likely to have had recent exposure and experiences with the airline or airport's environmental policies. It may therefore be the case that witnessing these policies firsthand drives trust. Further research would be needed to fully understand this point.

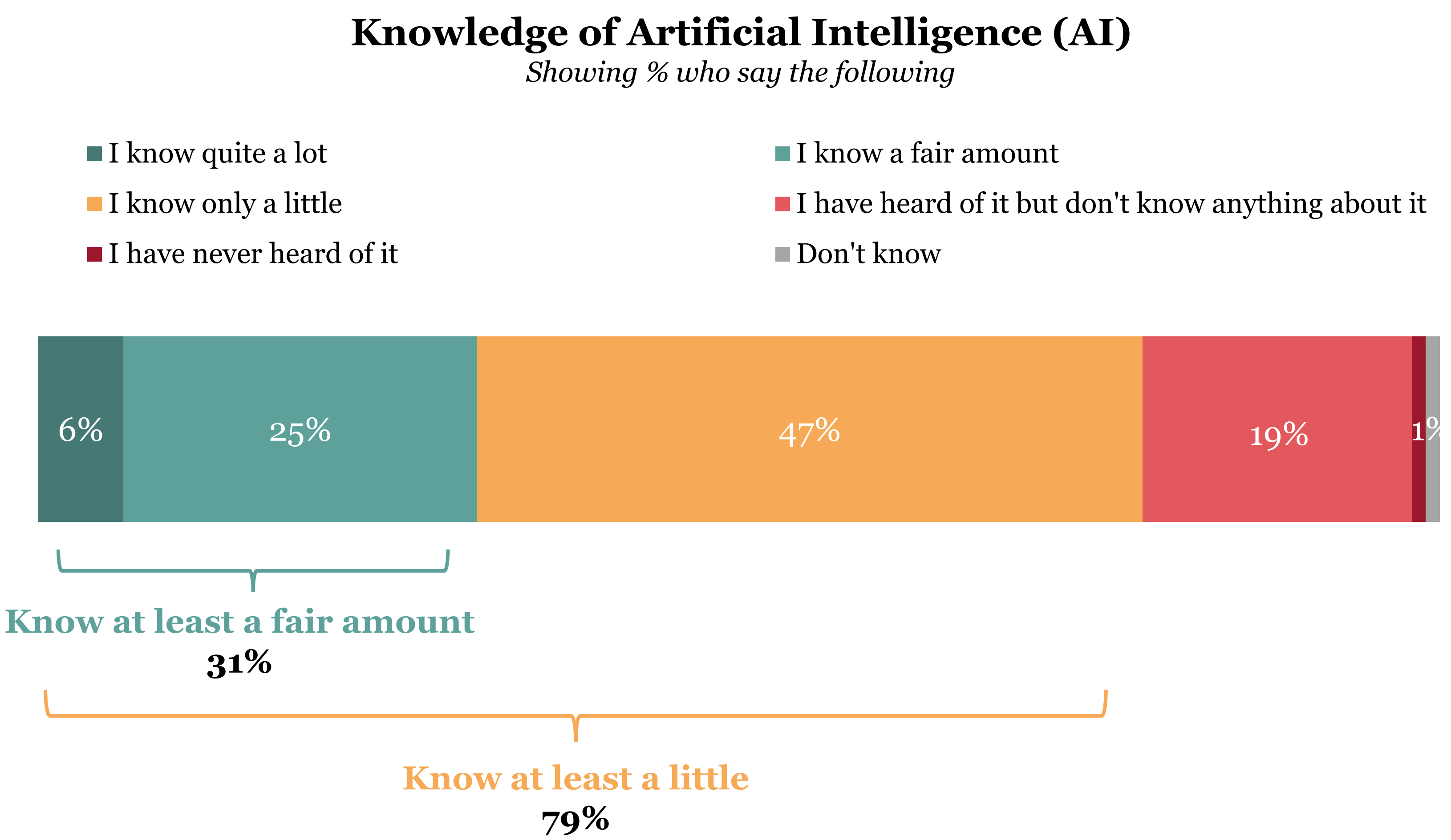
Q43. In general, to what extent, do you trust that airlines are genuinely committed to reducing the environmental impact of flying? Base: All respondents (n=3510).

Artificial intelligence and aviation

UK
Civil Aviation
Authority

Savanta:

The majority know at least a little about AI, but a deeper understanding of AI is limited



NET: Know at least a fair amount

18-34 year olds: 47%
35-54 year olds: 32%
55+ year olds: 19%

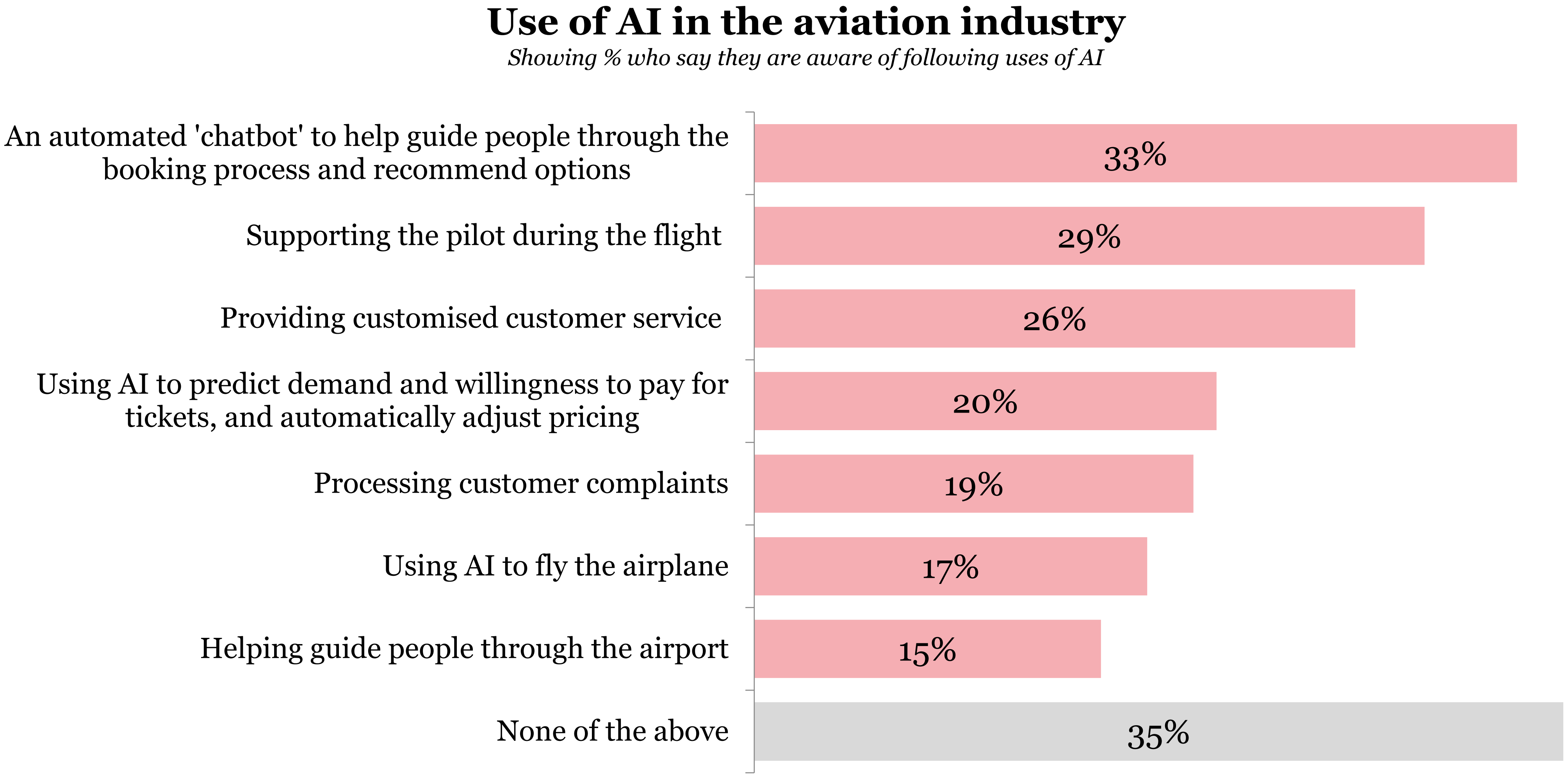
Younger consumers are significantly more likely to know at least a fair amount about AI compared to those 35 and over.

Those with low digital confidence also fall behind in knowledge of AI (7% know at least a fair amount compared to 33% of those who are digitally confident).

There is a knowledge gap between age groups and levels of digital confidence around AI.

Q44. At an overall level, how much would you say that you know about artificial intelligence (AI)? Base: All respondent (n=3510).

Knowledge of how AI is used in the aviation industry is fairly limited with a third being unaware of *any* use in the industry at present

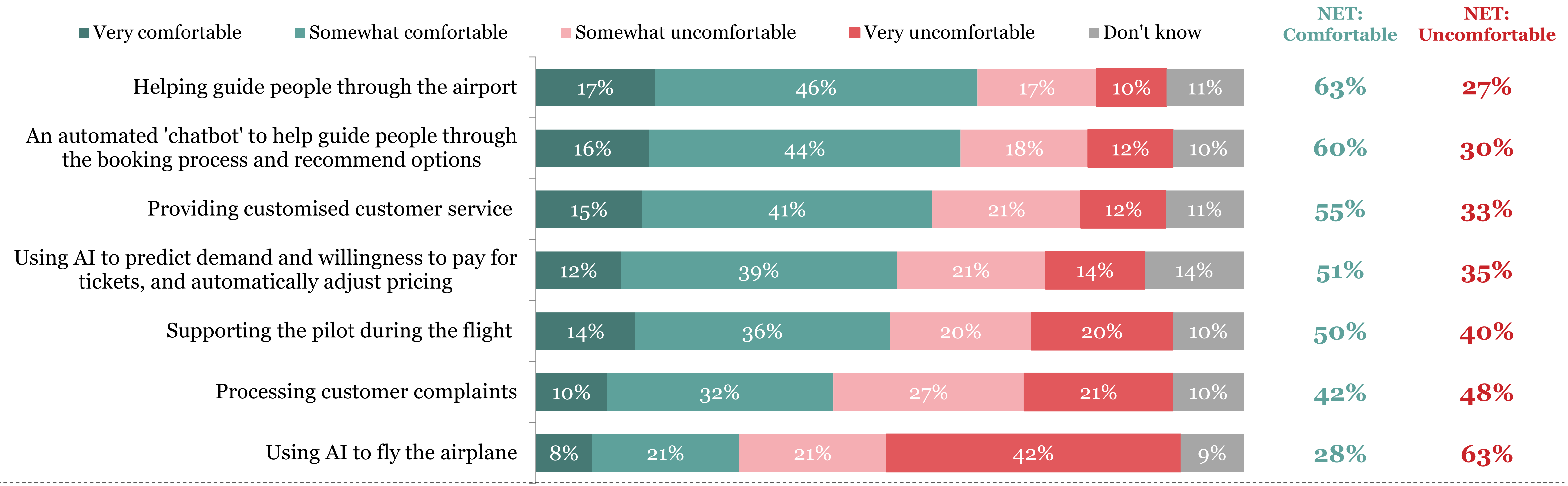


Q45. Which, if any, of the following uses of AI in the aviation industry were you aware of, before today? Base: All respondents who answered this question (n=3026). Note: originally this question was asked to all respondents including CATI but was changed to online only in the interests of respondent experience. Base: CATI respondents who answered the question (n=18), online respondents who answered the question (n=3008).

Whilst most people were unaware of this as a use case, they are most comfortable with using AI to help guide people through the airport

Level of comfort with the use of AI in the aviation industry

Showing % who say they are comfortable / uncomfortable with the following uses of AI



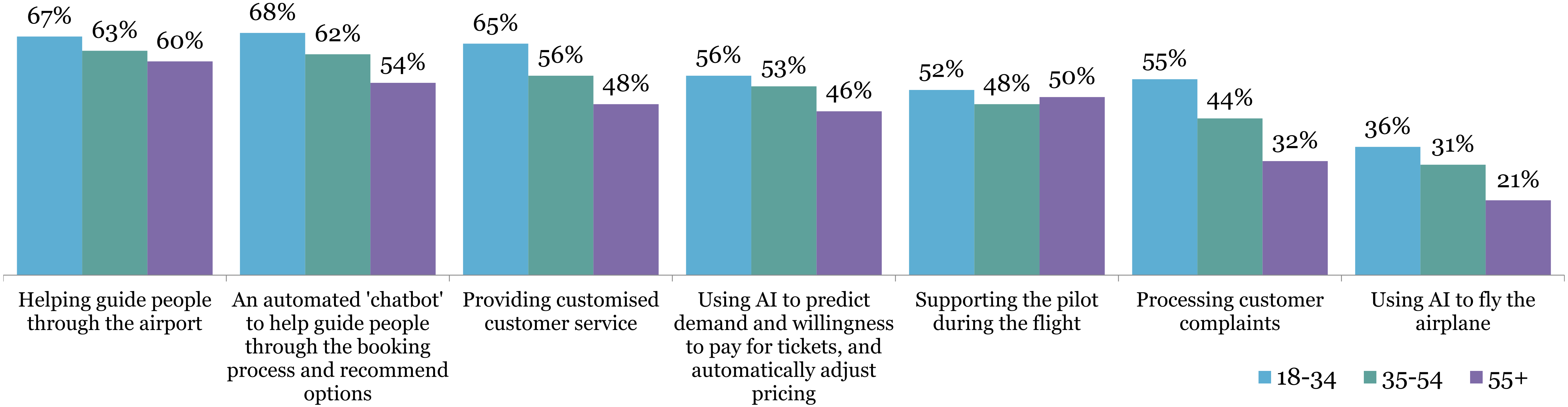
Levels of comfort seem to be based on risk, not prior familiarity with the use case. Passengers are more likely to be comfortable with use cases in which the negative consequences of the AI not functioning as intended would be less severe – a real person can step in to help if a person is sent to the wrong location in an airport, but the consequences of an AI incorrectly flying an airplane or incorrectly processing a complaint would likely be more consequential. This trend may be correlation rather than causation, however – it should be emphasized that consumers were not asked about *why* they are more or less comfortable with each use case.

Q46. To what extent would you be comfortable with each the following uses of AI in the aviation industry? Base: All respondents who answered this question (n=3026). Note: originally this question was asked to all respondents including CATI but was changed to online only in the interests of respondent experience. Base: CATI respondents who answered the question (n=18), online respondents who answered the question (n=3008).

Younger consumers are much more likely to be comfortable with AI being used in aviation, across most use cases

Level of comfort with the use of AI in the aviation industry

Showing % who say they are comfortable with the following uses of AI



Consumers aged 18-34 are significantly more likely to be comfortable with each aviation AI use case than those aged 55+. The only use case that has similar levels of comfort amongst these groups is supporting the pilot during flight, which is also the use case that those aged 55+ are most aware of.

Q46. To what extent would you be comfortable with each the following uses of AI in the aviation industry? Base: Base: All respondents who answered this question (n=3026). Note: originally this question was asked to all respondents including CATI but was changed to online only in the interests of respondent experience. Base: CATI respondents who answered the question (n=18), online respondents who answered the question (n=3008), 18-34 (n=841), 35-54 (n=937), 55+ (n=1,243).

Contact Details

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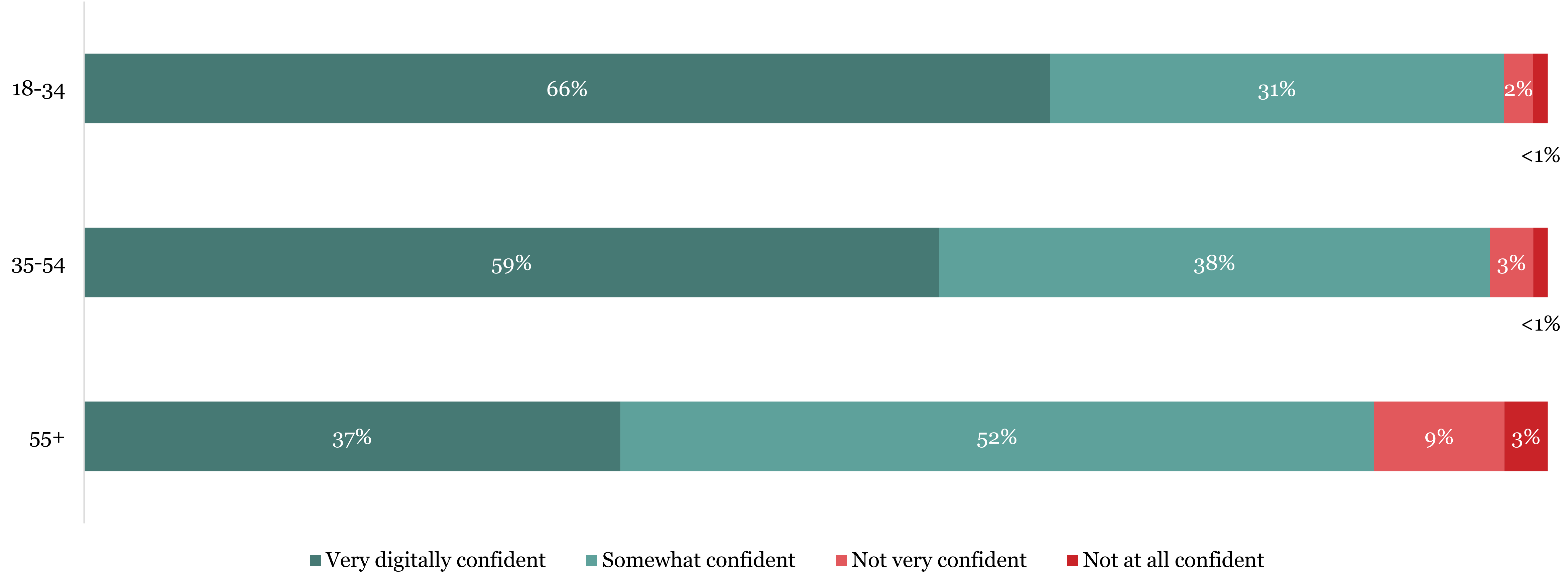
Appendix

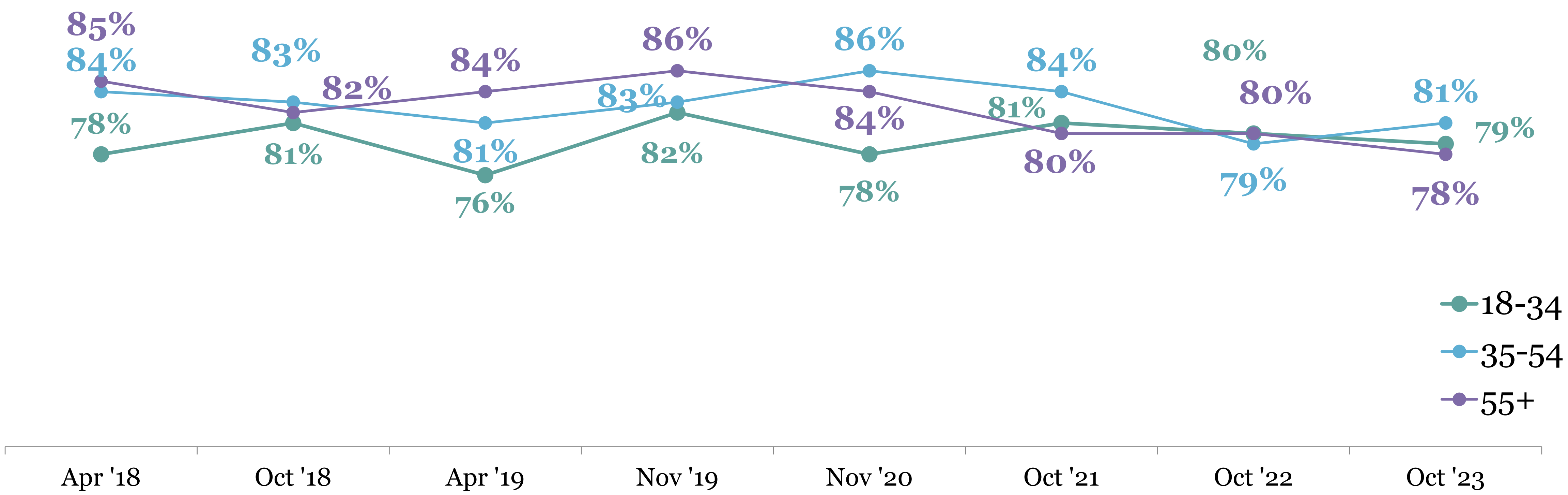
Age groups by digital confidence



Note that digital confidence is *not* one of the factors according to which respondents are recruited, so this chart should not be taken as nationally representative of digital confidence levels. Savanta offers telephone interviews in order to ensure that those lacking digital confidence are *included* in the survey and that their responses can be robustly compared to those amongst people *with* digital confidence, but this is not to say that these proportions are representative of that population.

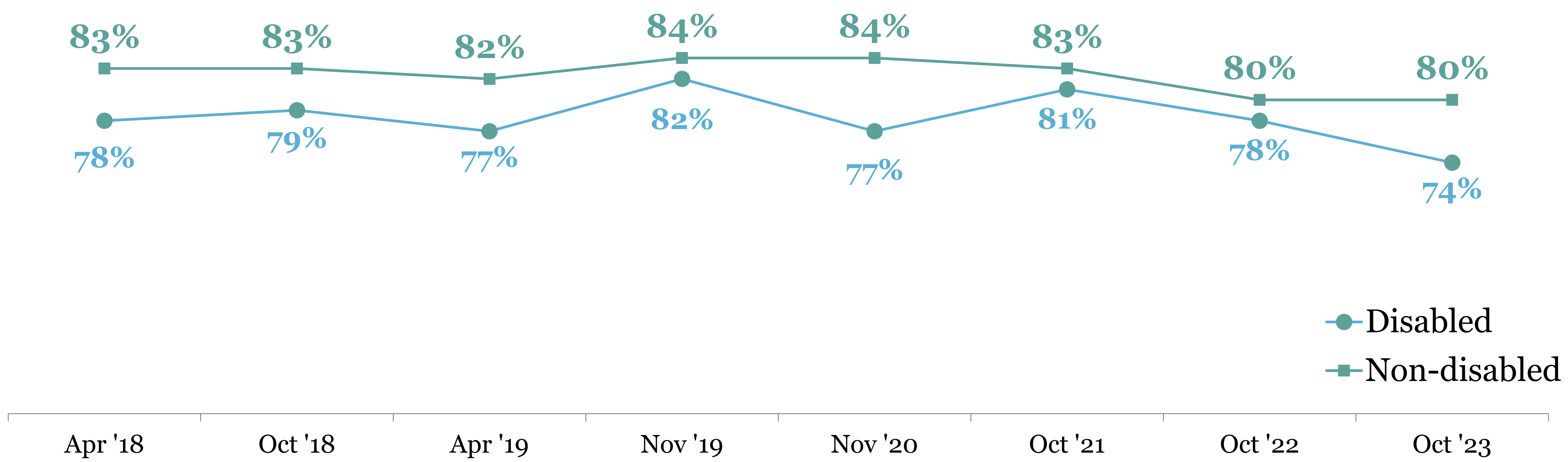
D5. Overall, how confident do you feel using computers, smartphones, or other electronic devices to do the things you need to do online? Base: all respondents (n=3,510).

Satisfaction with the overall travel experience on most recent trip, by age



Q23.17. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,903).

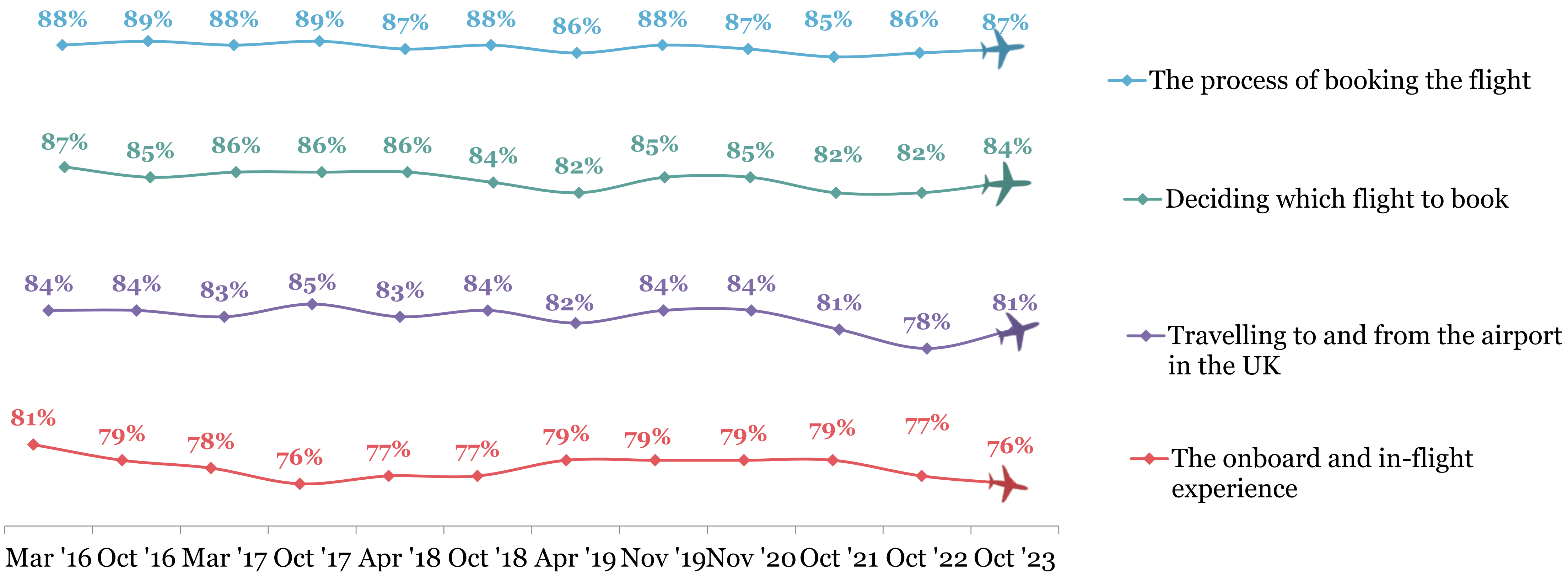
Satisfaction with the overall travel experience on most recent trip, by disability status



Q23.17. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,903).

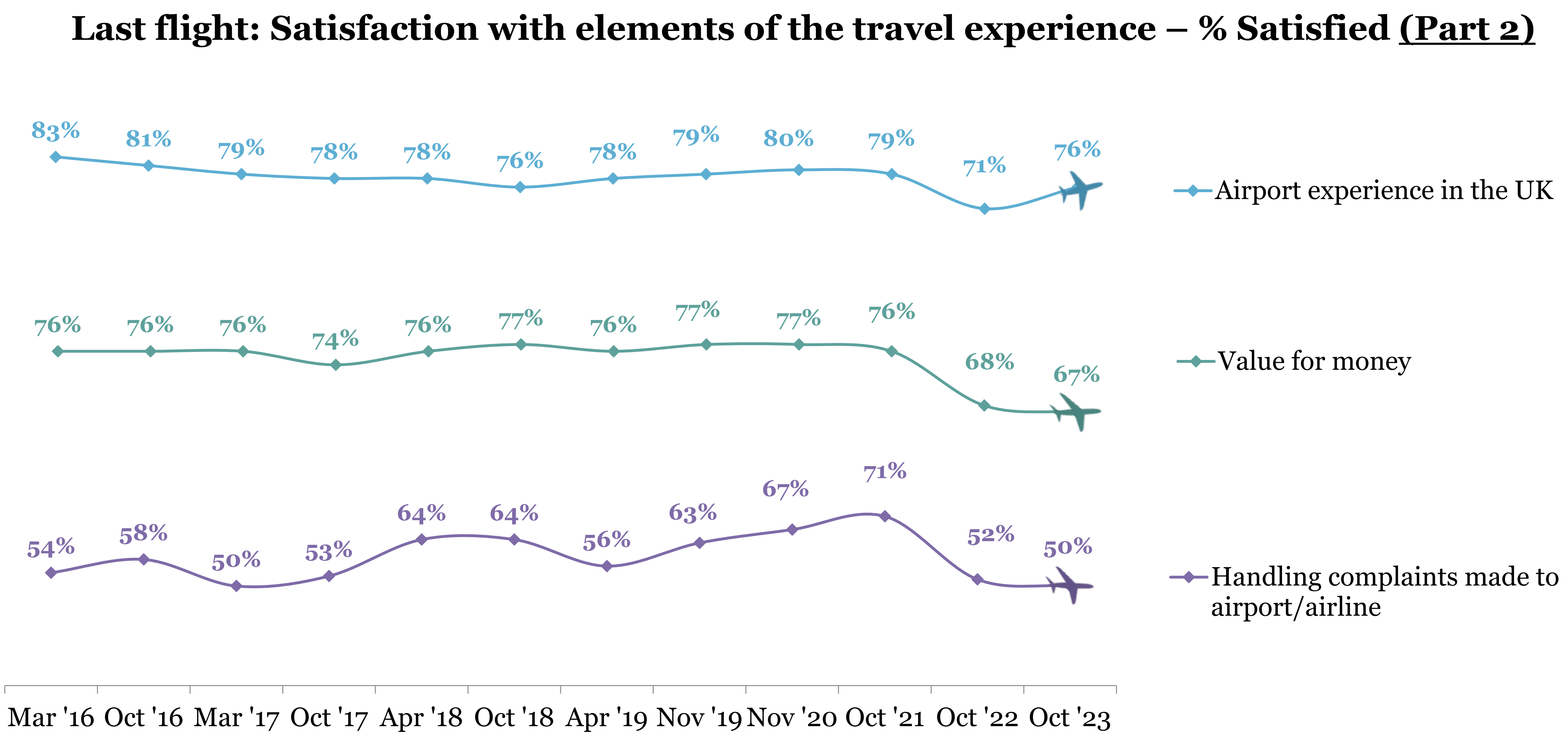
Satisfaction with elements of the travel experience, tracked data from March 2016 (Part 1 of 2)

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



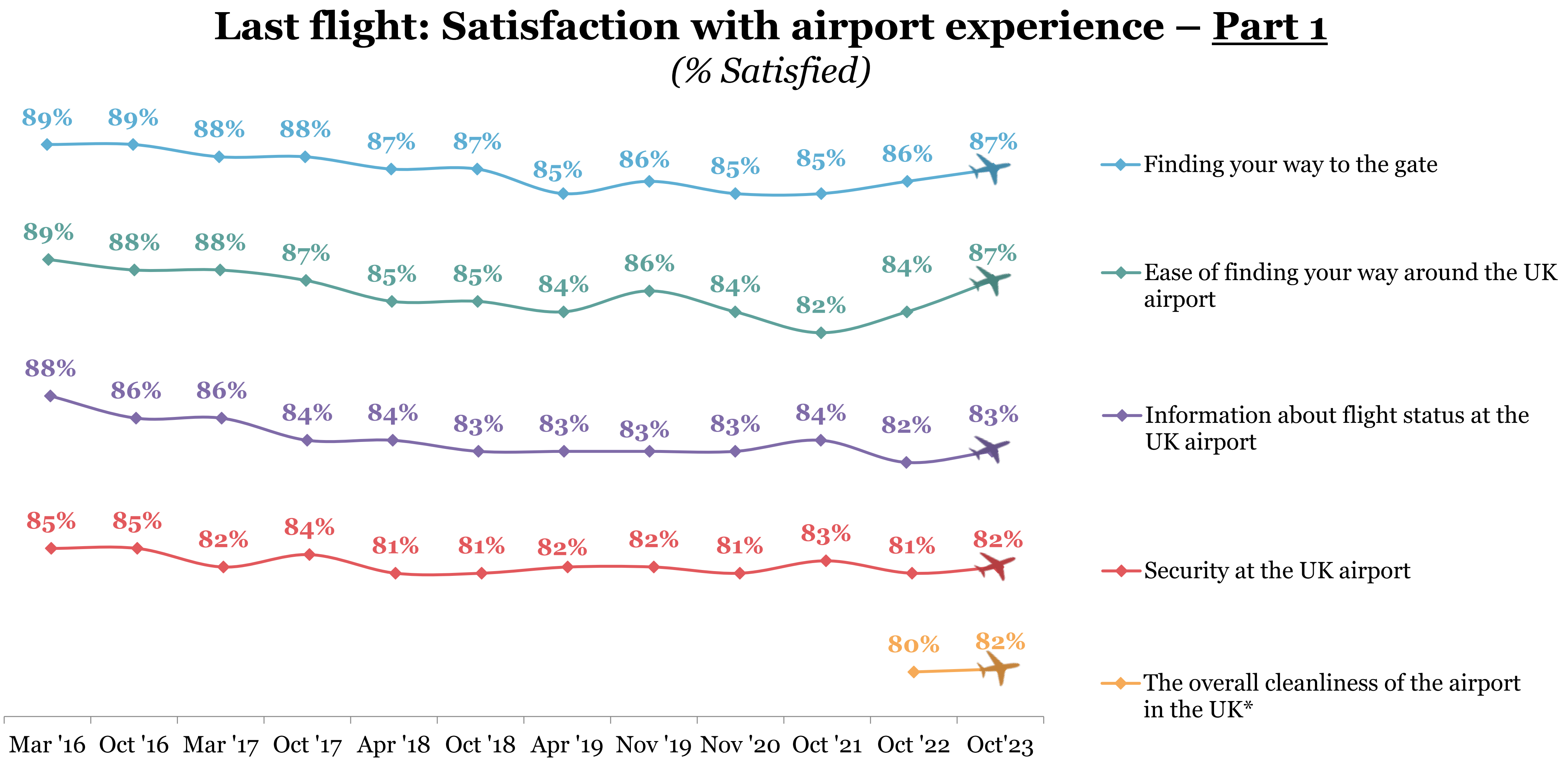
Q22. How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1858-1897).

Satisfaction with elements of the travel experience, tracked data from March 2016 (Part 2 of 2)



Q22. How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1008-1900).

Satisfaction with elements of the airport experience, tracked data from March 2016 (Part 1 of 3)

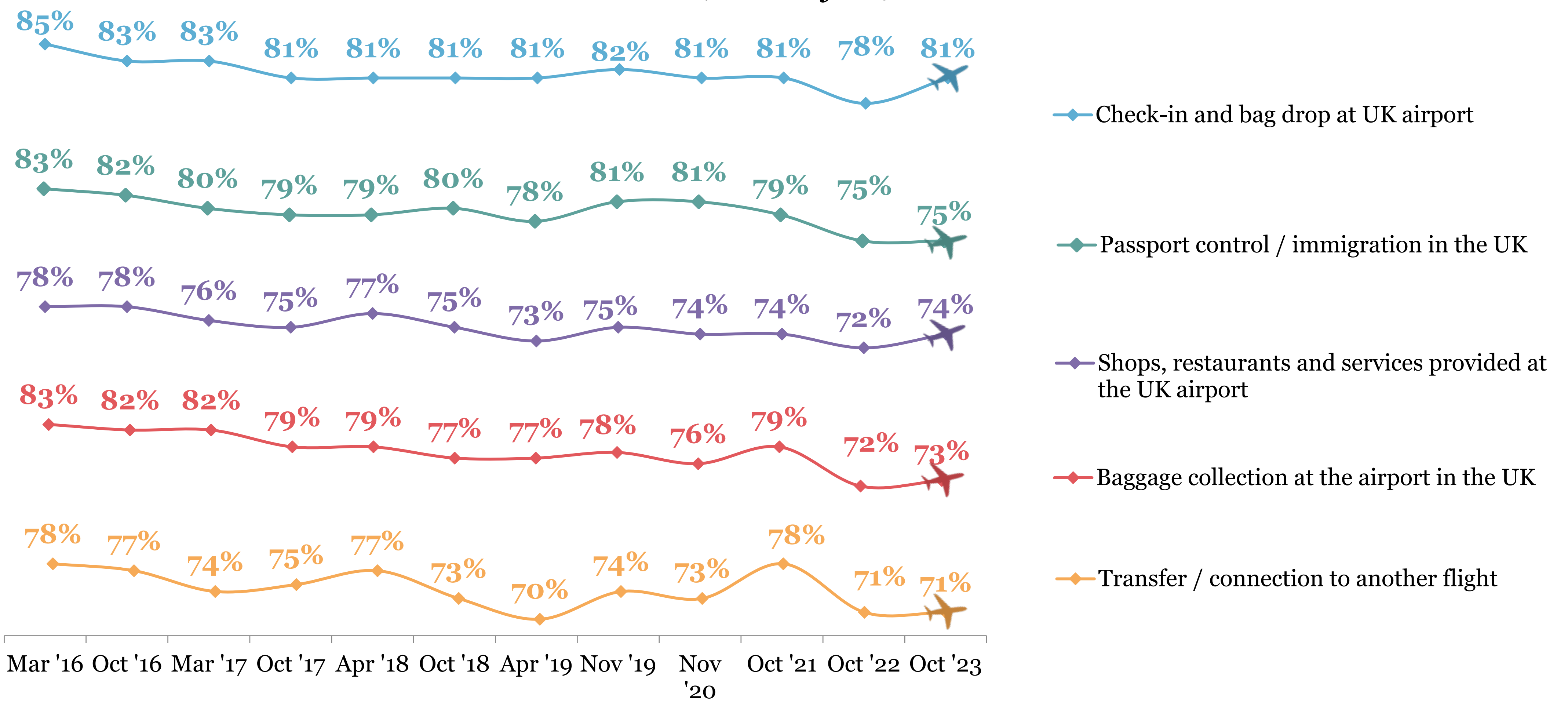


Q23. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,556-1,657). *Not tested prior to 2022.

Satisfaction with elements of the airport experience, tracked data from March 2016 (Part 2 of 3)

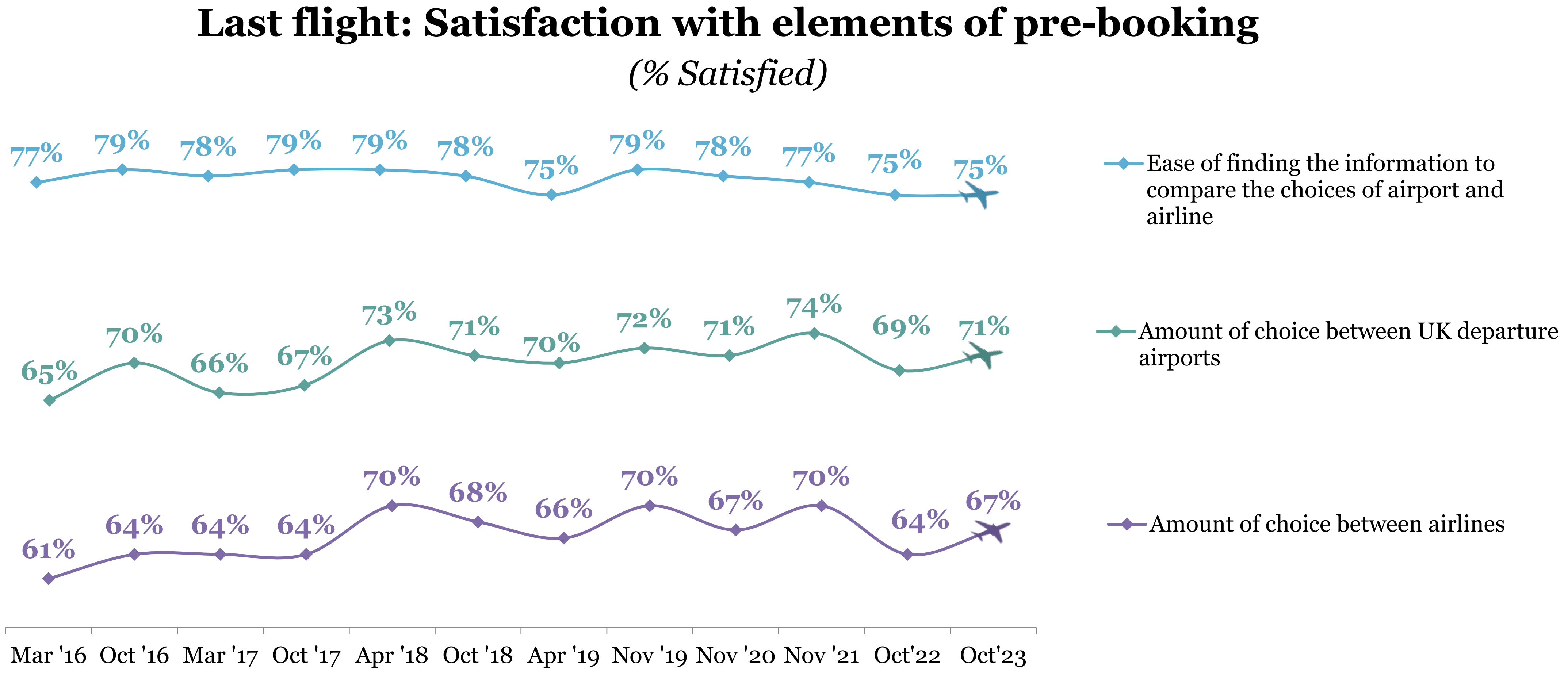
Last flight: Satisfaction with airport experience – Part 2

(% Satisfied)



Q23. 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=703-1,432).

Satisfaction with elements of the airport experience, tracked data from March 2016 (Part 3 of 3)



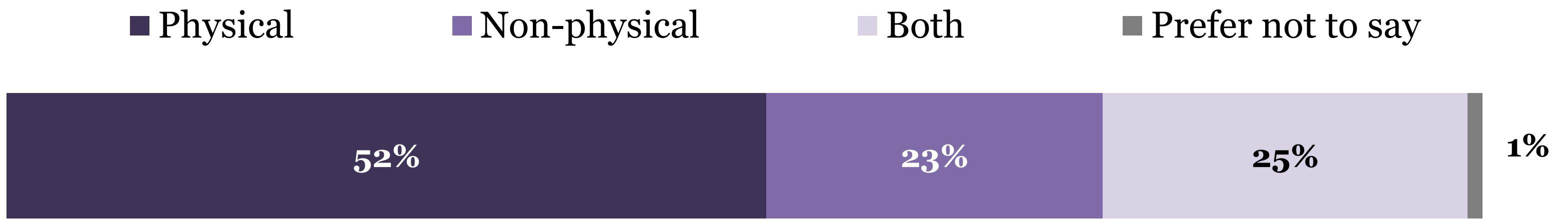
Q23. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,198-1,336).

Prevalence of types of disability and health conditions in the sample

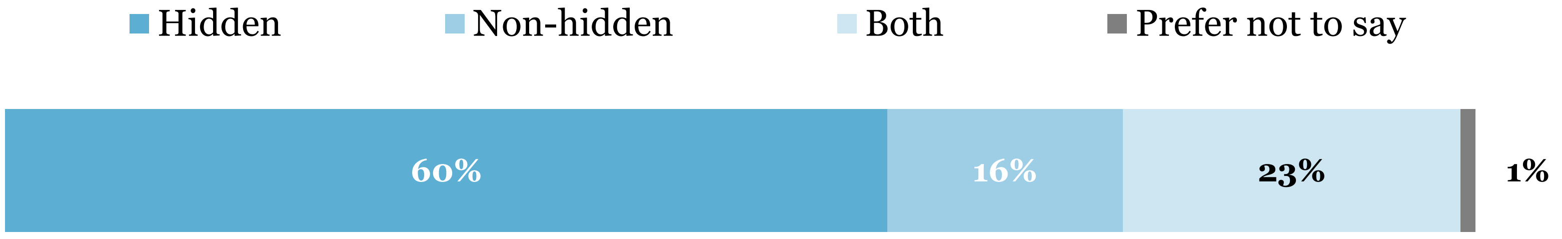
More than half (52%) of disabled passengers say that their disability is a physical one, compared to a quarter (25%) who say they have a non-physical disability.

Over four fifths of disabled consumers (83%) say either that they have a hidden disability or that they have both a hidden and a non-hidden disability, meaning that **the vast majority will not necessarily have their condition immediately recognised 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)

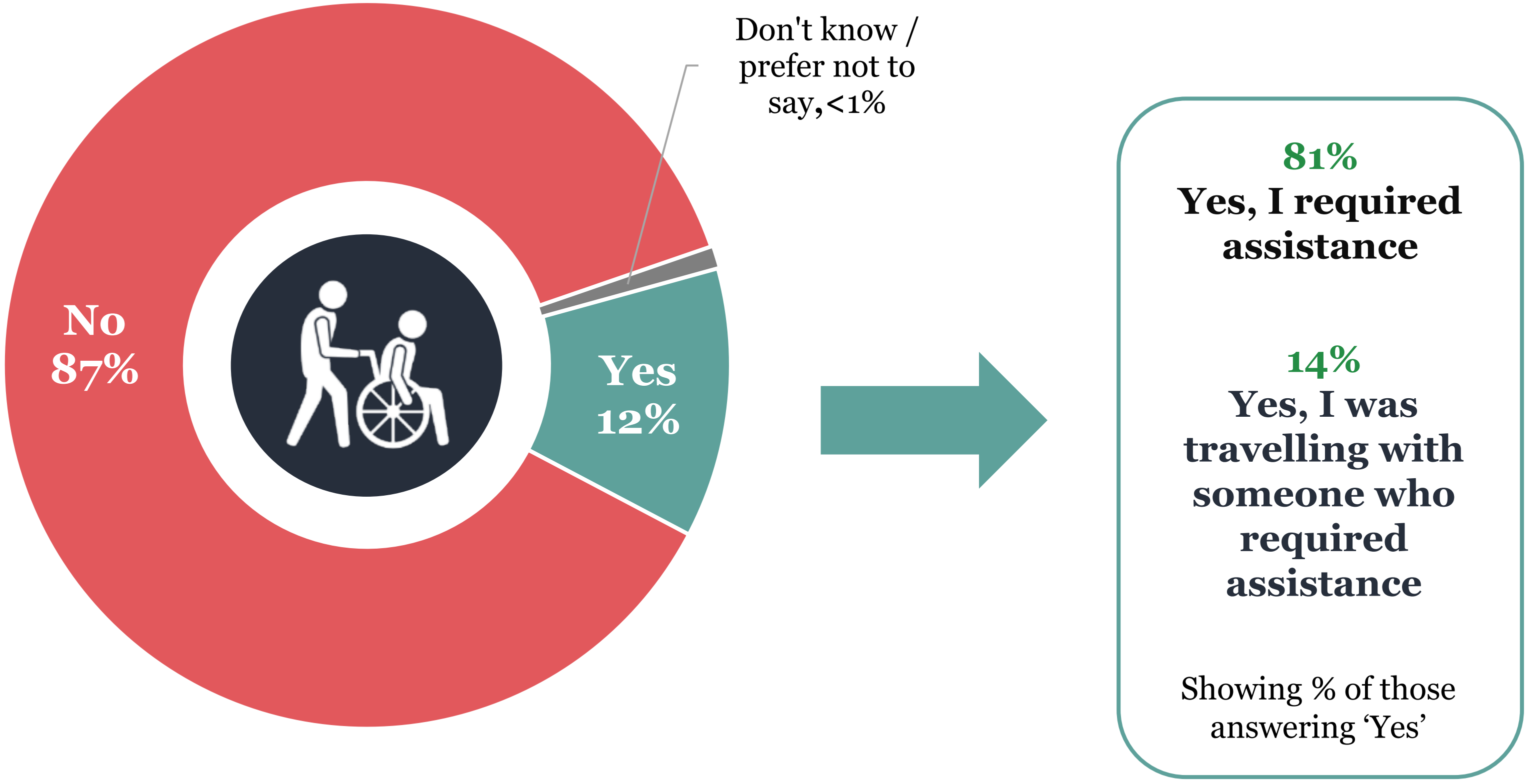


Q8. Would you classify your disability or health condition as physical, non-physical or both? Base: All who have a disability - online only (n=634).
Q9. Would you consider your disability to be a hidden or a non-hidden disability? Base: All who have a disability - online only (n=634).

1 in 10 recent flyers say that someone in their party required assistance on their most recent flight

Assistance required

Recent flyers or someone in their party who required assistance



Q18. Did you or anyone in your party have a disability or health condition that meant you required some assistance from the airport or airline on this occasion?
Base: All who have flown in the last 12 months (n=1,910).

Last flight: Satisfaction with airport experience at each journey touchpoint, comparing disabled passengers to non-disabled passengers

Journey touchpoint	Satisfaction amongst disabled passengers	Satisfaction amongst non-disabled passengers
Finding your way to the gate	80%	89%
Ease of finding your way around the airport in the UK	78%	89%
Boarding the plane	77%	84%
Information about flight status at the airport in the UK (e.g. departure time, delays, cancellation)	75%	84%
Security at the airport in the UK	77%	83%
The overall cleanliness of the airport in the UK	76%	83%
Check-in and bag drop at the airport in the UK	76%	82%
The overall travel experience	74%	80%
The journey between the boarding gate and the plane (e.g. a bus, or passenger boarding bridge)	68%	79%
Passport control/immigration in the UK	75%	75%
Ease of finding the information to compare the choices of airport and airline	66%	76%
Shops, restaurants and services provided at the airport in the UK	69%	74%
Waiting at the boarding gate	65%	75%
Baggage collection at the airport in the UK	63%	75%
Amount of choice between UK departure airports	65%	73%
Transfer / connection to another flight	62%	73%
Amount of choice between airlines	64%	68%

Q23. 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=991-1,903). *No instances were recorded of satisfaction being significantly higher amongst 55+ year-olds than 35-54-year-olds.