Flying in 2024 and beyond

Research findings from Wave 13 of the CAA's UK Aviation Consumer Survey

UK Civil Aviation Authority

Report by Savanta

Executive Summary (slide 1 of 2)

Section 1: Flying in 2024

Flight behaviour and frequency

- Consumers are flying in the highest numbers since this survey began in 2016, with 62% having flown in the last 12 months. This year's results reinforce the shift in the demographic profile of recent flyers observed last year, with recent flyers skewing much younger than pre-pandemic.
- Budgetary constraints are – by some distance – the most frequent reason given for not having flown in the last 12 months, with two fifths of consumers who have not flown recently citing this as a factor (38%).

Overall satisfaction

- Satisfaction with the overall travel experience rises to its highest level since 2019, with 84% of consumers satisfied overall with the experience on their most recent flight.
- Consumers are satisfied with aviation in higher numbers than with other modes of transport, but divides in satisfaction by household income and digital confidence are more pronounced than in other industries.
- The gap in overall satisfaction between disabled and non-disabled consumers' most recent flights has narrowed from 2023 – though there remains a large gap in satisfaction around aviation more broadly.

Satisfaction across the consumer journey

- Satisfaction with complaints handling, which has declined in recent years, shows significant improvement this year, likely contributing to the rise in overall satisfaction.
- The booking process continues to be the element of the travel experience which sees highest satisfaction, though most consumers would still like more information around costs.

Executive Summary (slide 2 of 2)

Section 2: Where next?

Consumer priorities and perceived industry priorities

- We asked consumers to prioritise several different areas, to understand the perceived relative importance of areas that the aviation industry might focus on. The exercise revealed reducing the cost of flying to be the most widespread priority amongst consumers, though this is far from universal – only around a quarter (27%) of consumers would prioritise this above all other areas.

- However, consumers do not feel the industry's priorities align with their own, particularly in reducing the cost and environmental impact of flying – two areas where relatively few consumers believe the industry is genuinely committed.

We also asked consumers about perceptions within each of these most widely prioritised areas:

- **Value for money** is the only element of air travel tested where satisfaction still lags significantly behind pre-pandemic levels. Disabled and digitally excluded passengers are significantly less satisfied with value for money than their counterparts, with this gap widening since last year.

- **Travel disruption** is faced in similar numbers to last year. Disruption negatively impacts consumer satisfaction, but also appears to erode consumer trust in the industry more widely – including in areas apparently unrelated to travel issues such as reducing the cost and environmental impact of flying.

- **Attitudes towards the environment** are similar to those seen last year, with widespread concern about the environment, but relatively few consumers willing to fly less or pay more to offset the environmental impact of flying. As seen last year, consumers tend to see paying for environmental measures as the airline's responsibility rather than their own. Younger consumers clearly care about the environmental impact of aviation, but results suggest that the affordability of flying may be of greater importance to them.

An introduction to the Aviation Consumer Survey

This annual research – now into its thirteenth instalment – aims to provide an in-depth understanding of UK consumers' flying behaviours and their attitudes towards travelling by air over time. It surveys a robust, nationally representative sample of 3,500 UK adults on a variety of aviation-related topics, building a picture of ***how and why consumer experiences of aviation are changing over time.***

Last year's instalment took stock of the long-term trends in satisfaction and passenger experience, setting out how the aviation consumer landscape has fundamentally changed following the COVID-19 pandemic. The research revealed that the profile of recent flyers has become markedly younger between 2019 and 2023, and that outcomes are perceived to have worsened faster for older and disabled consumers than for other flyers.

These themes remain salient in 2024, but this instalment introduces a new, forward-looking question: ***which areas do consumers want the industry to focus on?***

Understanding how consumers are answering these questions – and why – should be a priority for policymakers and industry leaders, with a new Government in office, and many aviation behaviors and attitudes beginning to resemble pre-pandemic patterns once again. This report aims to equip decision-makers with insights to consider what more can be done to foster an aviation experience that aligns more closely with consumer priorities and expectations.

This research is also designed to provide valuable insights for stakeholders beyond the policymaking sphere, however. Historically, this report's audience has included airports, airlines, public bodies, and the general public. Our goal is to deliver a rich understanding of consumer behaviours and attitudes, which readers can apply to their specific contexts.

Contents

Section 1.1:

Flying behaviour and flight frequency

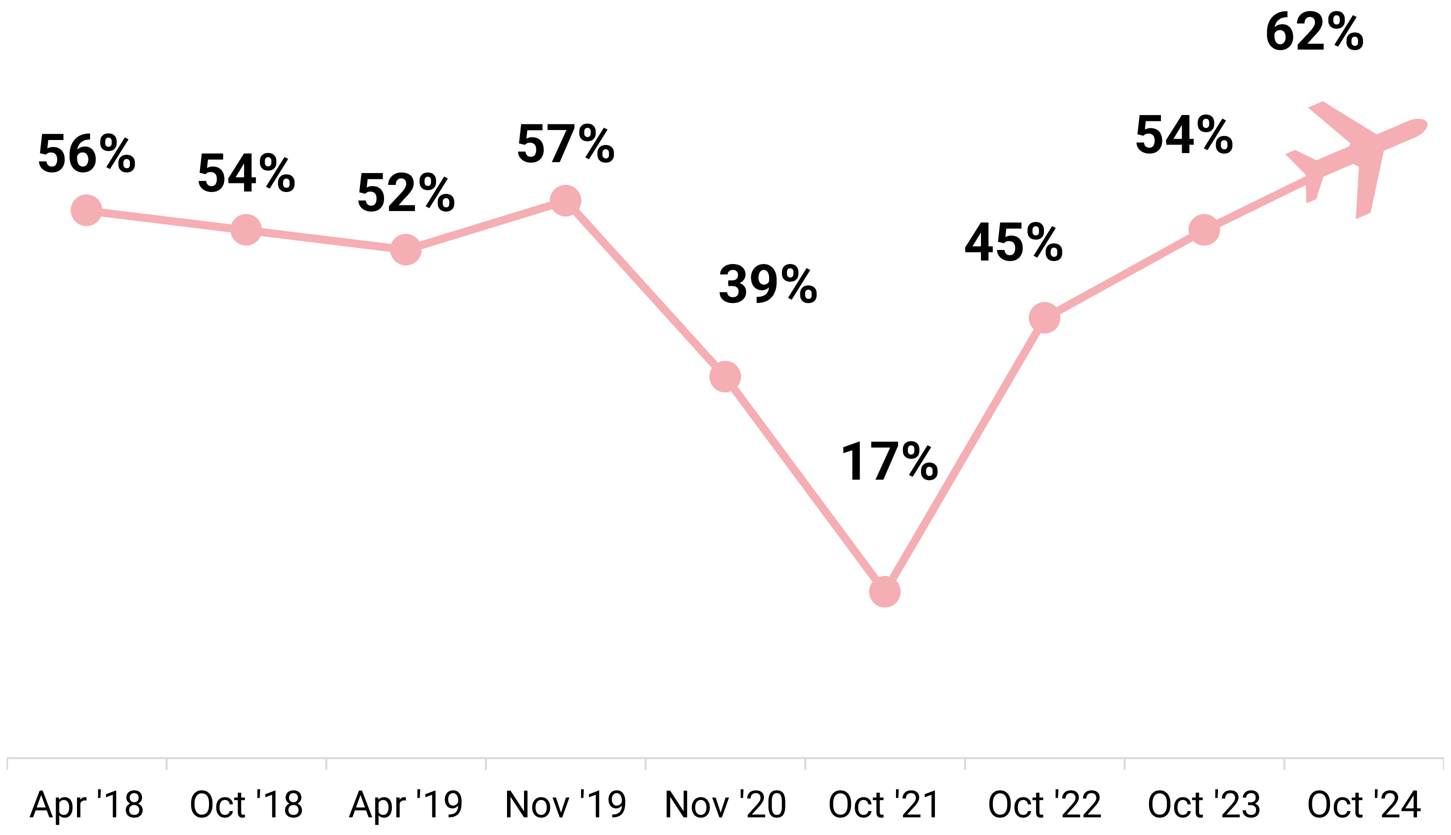
Key takeaways from this section:

- **Consumers are flying in the highest numbers since this survey began in 2016**
- **This year's results reinforce the shift in the demographic profile of recent flyers observed last year, with recent flyers skewing much younger than pre-pandemic**
- **Budgetary constraints are – by some distance – the most frequent reason given for *not* having flown in the last 12 months**

Click the arrow to skip to key takeaways in the next section

More consumers are flying than ever, with three-fifths of the UK public having flown in the last 12 months – the highest figure since this survey began

Showing percentage of UK adults that have flown in the last 12 months



During the COVID-19 pandemic, far fewer people took trips by air, with just 17% of the public surveyed in October 2021 saying that they had flown from a UK airport over the previous 12 months. Since then, our research has recorded a steady recovery in flight numbers – with this figure tripling to reach 54% in October 2023. This represented a return to pre-pandemic flight levels.

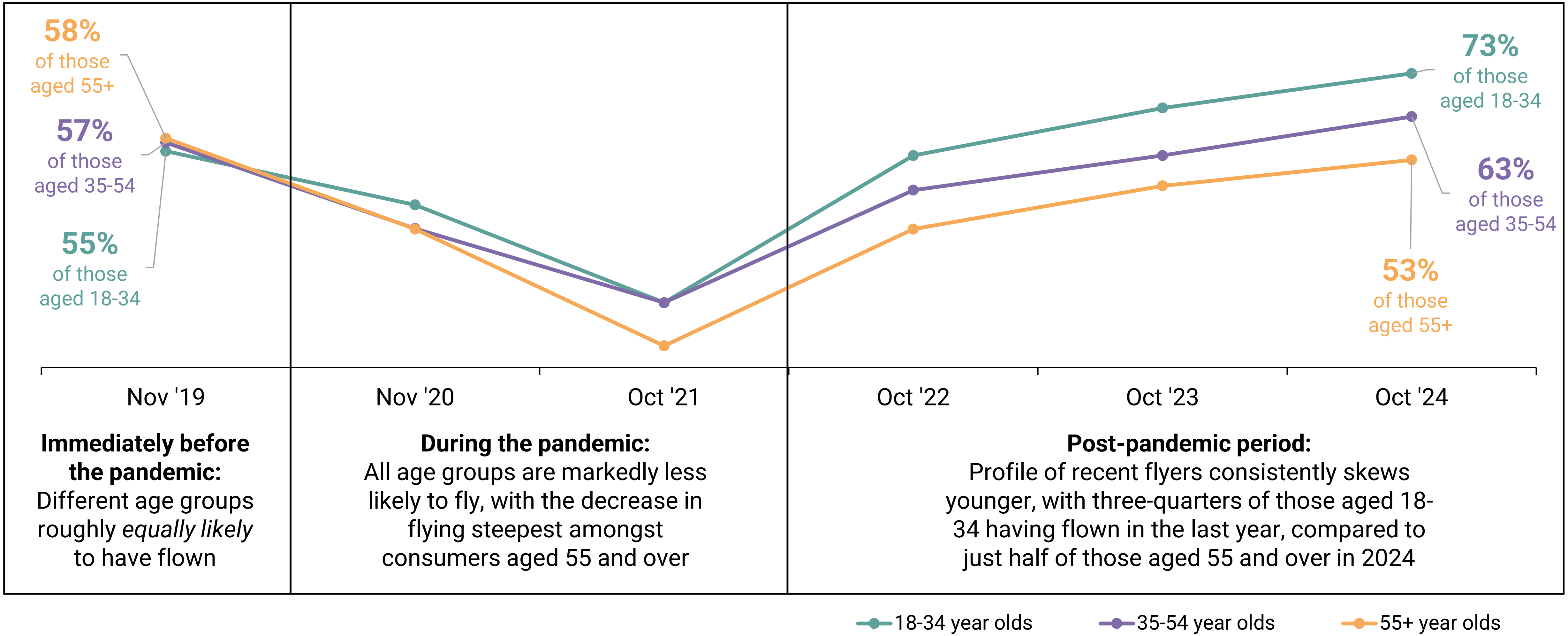
This year, the proportion of consumers having flown in the last 12-month period continues to rise, surpassing even pre-pandemic levels: 62% of UK adults say that they have taken at least one trip by air in the last 12 months, the highest figure on record.

As well as *more* consumers flying, this year also sees an all-time high in the *number of flights* that recent travellers have taken, with those who have flown in the last year having taken an average of 3.2 round trips by air.

Q1. When was the last time you flew from a UK airport, either to travel within the UK or to go abroad? Q2. How many trips by air have you made in the last 12 months?
Base: All respondents, October 2024 (n=3500).

This year's results reinforce the shift in the demographic profile of recent flyers observed last year, with recent flyers skewing much younger than pre-pandemic

Showing percentage of UK adults that have flown in the last 12 months, by age group



Immediately before the pandemic: Different age groups roughly *equally likely* to have flown

During the pandemic: All age groups are markedly less likely to fly, with the decrease in flying steepest amongst consumers aged 55 and over

Post-pandemic period: Profile of recent flyers consistently skews younger, with three-quarters of those aged 18-34 having flown in the last year, compared to just half of those aged 55 and over in 2024

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, October 2024 (n=3500).

Both trends – the increased proportion of consumers flying and the younger demographic profile of recent flyers – look set to continue in the future

1 Increased proportion of consumers flying

We asked consumers how they expect their flight behaviour over the *next* 12 months will compare to the previous 12-month period. Three in ten (30%) expect that they will take more over three times as many as the proportion who anticipate flying *less* (9%):

This is even higher (47%) amongst those who have not flown in the last year but *have* flown at some point in the past four years, suggesting a notable resurgence in demand among lapsed flyers. If this anticipated demand materialises, one would expect recent flyer numbers to climb even further in future waves of this research.

2 Younger demographic profile of recent flyers

There is a clear relationship between age and the likelihood of expecting to fly more in the next 12 months. Younger adults (those aged 18-34) are nearly twice as likely as those aged 55 and over to anticipate an increase in their air travel compared to the previous 12-month period:

40% of those aged 18-34 think they will fly an increased amount

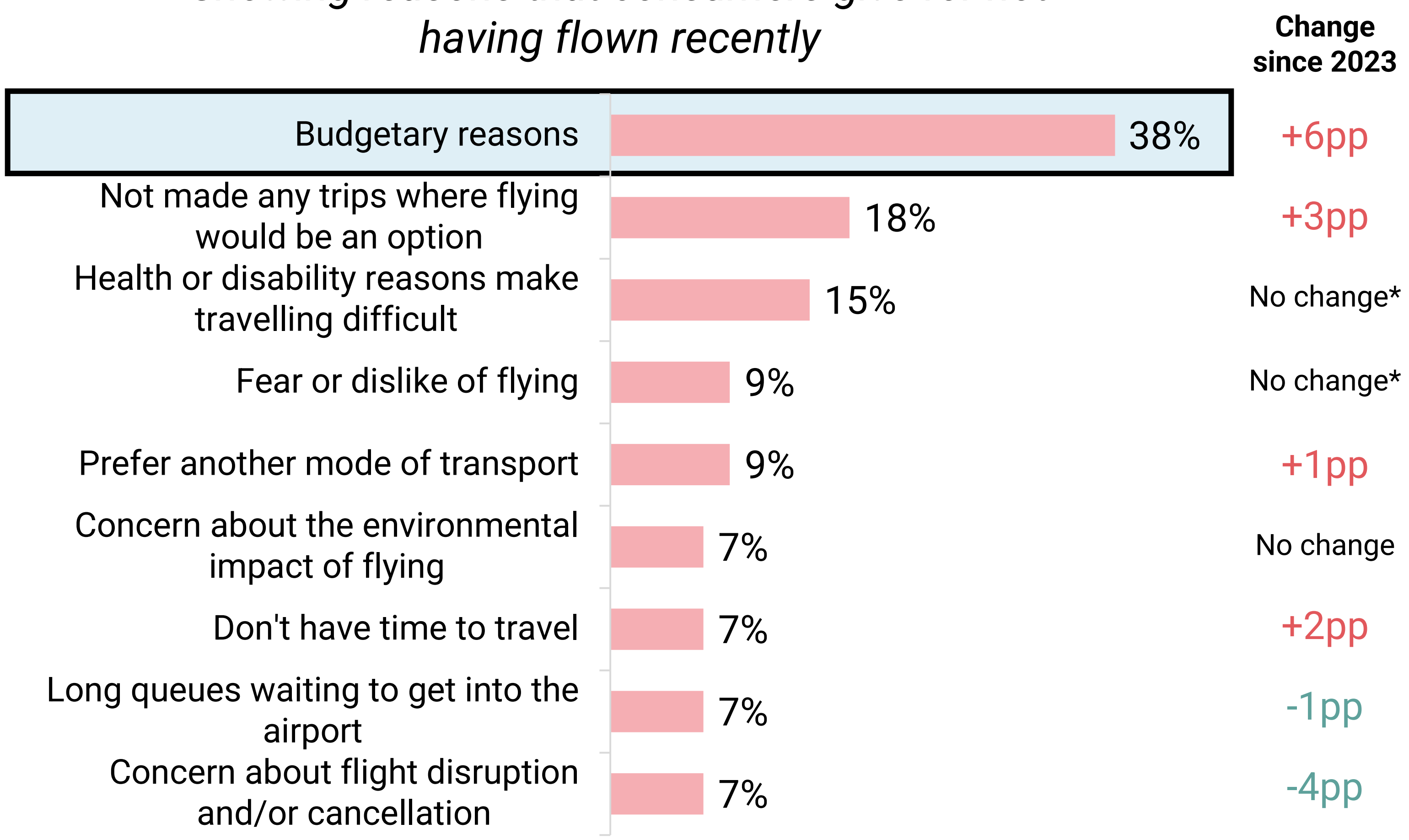
30% of those aged 35-54 think they will fly an increased amount

23% of those aged 55 and over think they will fly an increased amount

Q4. In the next 12 months, do you expect that you will fly more, the same amount or less compared to the number of times you have flown over the last 12 months?
Base: All respondents, October 2024 (n=3500).

Affordability is the most widely cited barrier to flying, with two fifths of consumers who have *not* flown in the last year saying this was a contributing factor

Showing reasons that consumers give for not having flown recently



Budgetary challenges – whether the cost of air travel specifically, or disposable income being squeezed by an increase in the cost of living more generally – are the most widely cited reasons for not having flown recently. These are identified as a barrier to having flown recently in significantly higher numbers than any other factor.

All age groups cite budgetary reasons in much higher numbers than any other factor. However, there are still notable differences by age here. Those aged 55 and over are significantly *less* likely to identify budgetary reasons as a reason for not having flown than younger consumers, and are significantly *more* likely to cite health or disability reasons, long queues, and concern about flight disruption and/or cancellation.

Q3. Why have you not flown in the last 12 months? Note: respondents could pick multiple barriers, so the sum of the percentages exceeds 100%. Base: All respondents who have not flown in the last 12 months (n=1321). *In previous years, these were broken out into more granular codes (e.g., fear of flying and dislike of flying). The answer options were simplified this year.

Section 1.2:

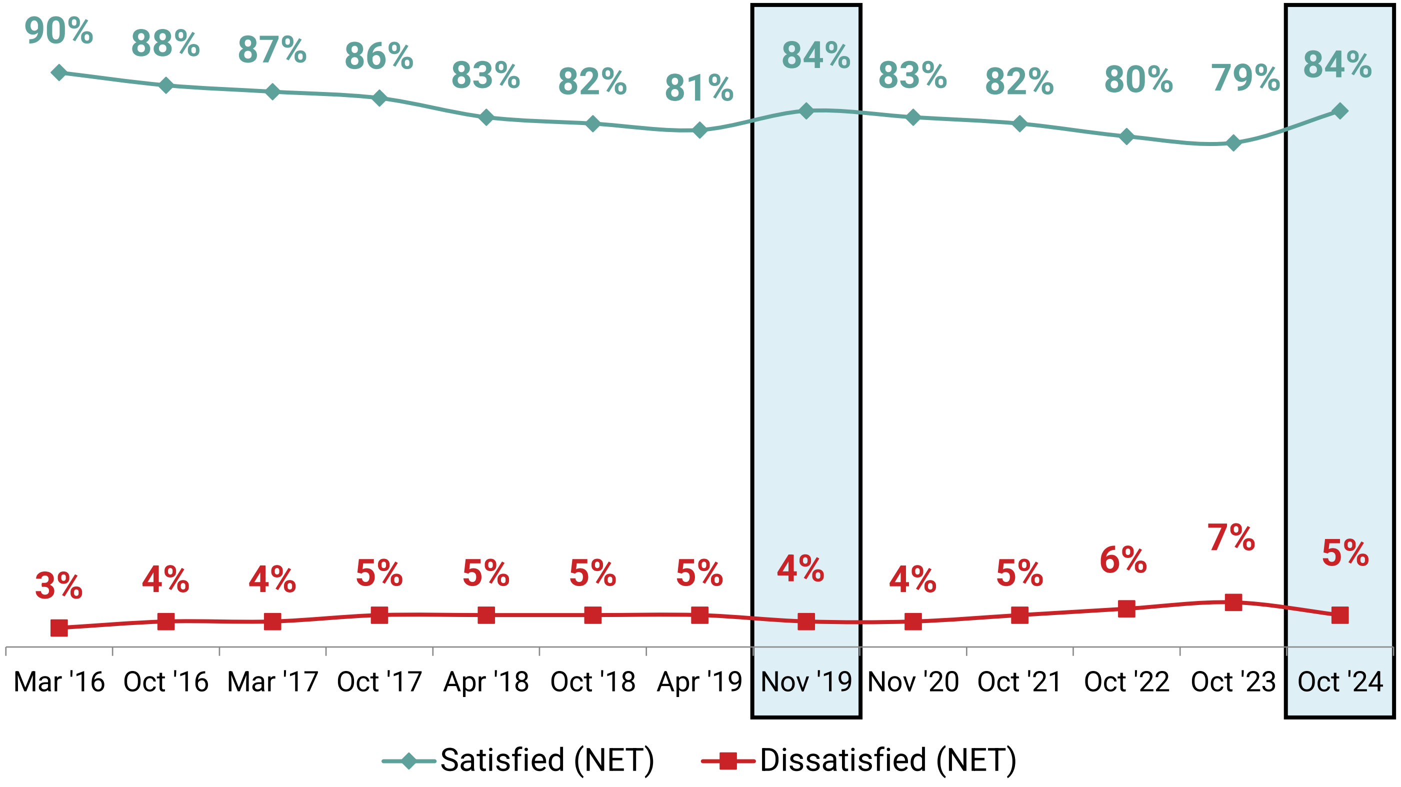
Satisfaction with the overall experience of flying

Key takeaways from this section:

- **Satisfaction with the overall travel experience rises to its highest level since 2019, after four years of decline**
- **Northern Ireland sees a significant increase in satisfaction from last year, with positive recent experiences around transfers and connecting flights a driving factor**
- **The new metric added to compare satisfaction across transport industries finds that satisfaction with aviation is higher than other modes of transport, but also reveals wider divides in satisfaction by household income and digital confidence than in other industries**

Satisfaction with the overall travel experience on passengers' most recent flight rises back to the level seen immediately before the pandemic

Showing percentage of recent flyers who were satisfied with the overall travel experience on their most recent flight



Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'

After four consecutive waves of decline, the proportion of recent flyers who say they were satisfied with the overall travel experience on their most recent flight rises to 84%, the highest figure seen since November 2019.

The handling of consumer complaints has historically had a large bearing upon satisfaction. Consumers who make a complaint are a relatively small proportion of the overall population, but if their complaint is perceived to be handled poorly, this has a marked impact on their overall satisfaction. This year, satisfaction with complaints handling rises markedly – again returning to the levels seen in November 2019 after a sustained period of decline, as will be seen in Section 1.3. While there is no single explanation for the increase in overall satisfaction, the increase in satisfaction with complaints handling likely has had a large impact.

Additionally, many of the individual touchpoints in the flight journey where satisfaction has historically been lowest see year-on-year improvements this year, as Section 1.3 discusses.

Q24.14. How satisfied or dissatisfied were you with the overall travel experience?
Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 2159)

Satisfaction by age group and disability status also closely resembles the picture seen in November 2019

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

	Overall	*By age*			*By disability status*	
Current satisfaction levels:	84% of all recent flyers are satisfied	84% of those aged 18-34	83% of those aged 35-54	86% of those aged 55+	82% of consumers with a disability	84% of consumers with no disability
Change from Nov. 2019:	No change	+2pp	No change	No change	No change	No change
Change from Oct. 2023:	+5pp	+5pp	+2pp	**+8pp**	**+8pp**	+4pp

As Section 1.1 noted, the profile of recent flyers shows no sign of returning to the one seen in November 2019, with flyers skewing much younger than seen pre-pandemic. In contrast, overall satisfaction *does* appear to have reverted to the picture seen immediately before the pandemic, with satisfaction by age and disability status very similar to the levels recorded in 2019. In fact, for all groups except 18-34-year-olds, satisfaction levels are *exactly* the same as seen in November 2019.

Q24.14. How satisfied or dissatisfied were you with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 2163), including those aged 18-34 (n=694), 35-54 (n=720), and 55+ (745), and those with (n=272) and without (n=1873) a disability or health condition.

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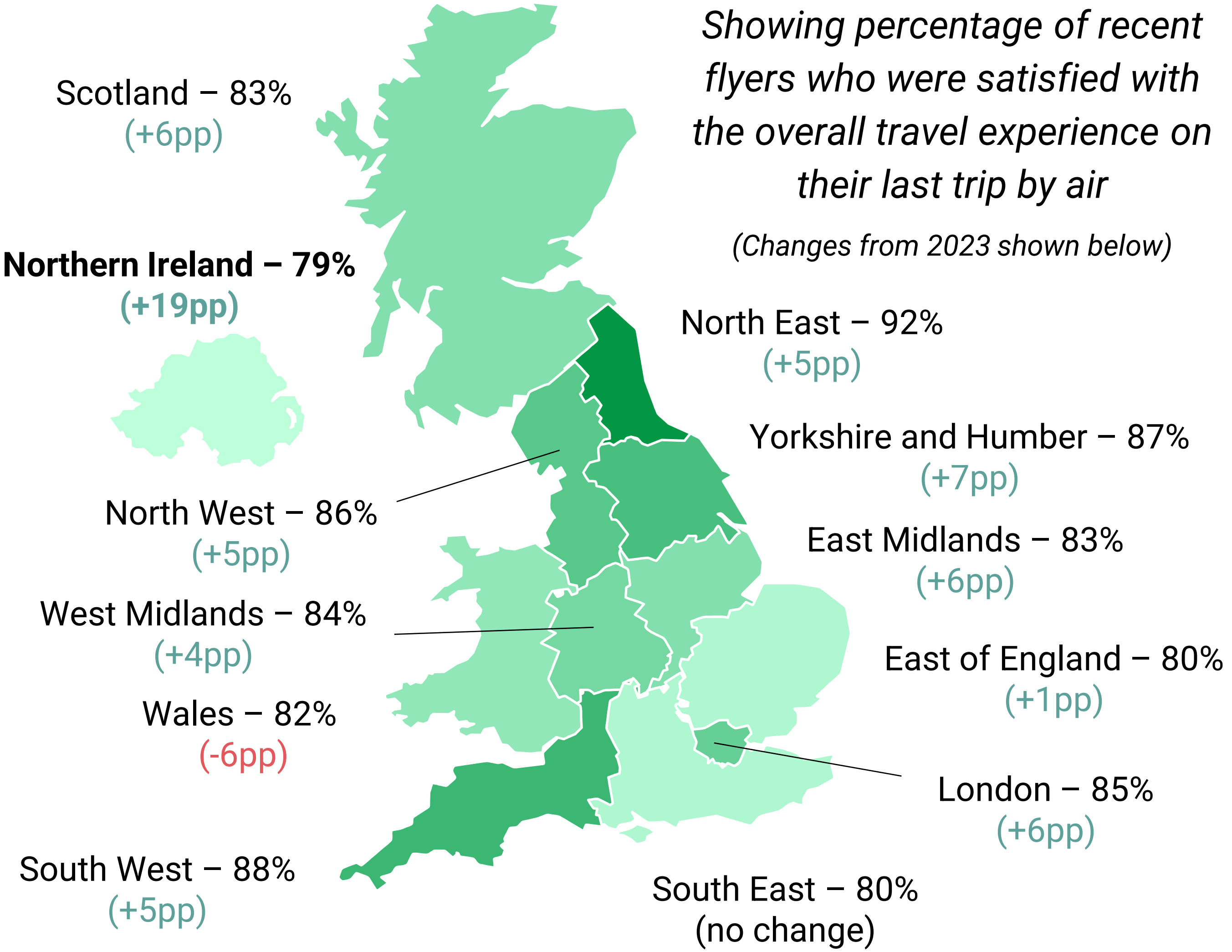
Satisfaction with the overall travel experience recovers in Northern Ireland, with satisfaction equal to or higher than 2023 levels in every region except Wales

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

(Changes from 2023 shown below)



Given the pronounced increase in overall satisfaction, it is unsurprising that most regions of the UK see an increase in satisfaction. Most notable amongst these is Northern Ireland, which sees a 19-percentage-point increase in the proportion of recent flyers who were satisfied overall.

One significant contributing factor here is the increase in satisfaction with transfers and connections to other flights. Many flyers from Northern Ireland reach their destination via a connecting flight, and a poor experience here is often referenced in verbatim comments.

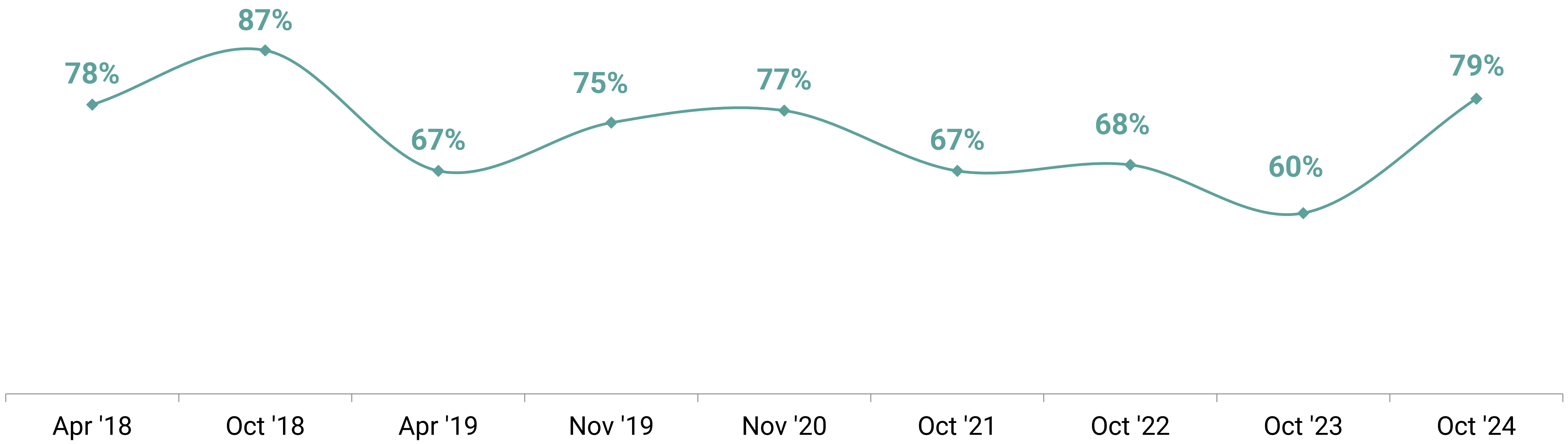
Last year, satisfaction with this part of the journey was significantly lower in Northern Ireland, with 56% of consumers satisfied, compared to 71% of consumers overall. This year sees satisfaction with transfers rise from 71% to 77% overall, but more significantly, from 56% to 90% in Northern Ireland.* So not only has performance improved in an area that was a particularly prevalent painpoint for Northern Irish flyers, but it has also dramatically exceeded the overall improvement seen across the UK.

The decline in satisfaction in Wales appears to be driven by a year-on-year drop in satisfaction with two customer journey touchpoints in particular: information about flight status in the airport, and waiting at the boarding gate.

Q24.14. How satisfied or dissatisfied were you with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 2159).
*Note this is a low sample size (n=29 for both NI *and* had a transfer/connecting flight) and so fluctuates considerably year-on-year, which is also likely a contributing factor here.

Satisfaction in Northern Ireland is at its highest level since 2018, though has always fluctuated considerably

Showing percentage of recent flyers who were satisfied with the overall travel experience on their most recent flight, consumers from Northern Ireland only



Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'

Note: the base size for recent flyers who are based in Northern Ireland is relatively low (n=66 in 2024), which likely contributes to this fluctuation

Q24.14. How satisfied or dissatisfied were you with the overall travel experience?
Base: All consumers based in Northern Ireland who have flown in the last 12 months, excluding DK and NA responses (n= 66).

This year's survey sees the addition of a second measure of overall satisfaction, to better facilitate cross-industry comparison

Existing satisfaction measure:
tracks satisfaction over time, but does not facilitate cross-industry comparison

Historically, the sole question used as an indicator of consumer satisfaction with aviation in this survey has been as follows:

How satisfied or dissatisfied were you with the overall travel experience on your most recent flight?

This question, as seen on the previous slides, has been included in the survey since its inception since 2016, and so satisfaction levels can be tracked over time using it. It is asked only to those who flew in the last 12 months and is focused specifically on their most recent trip by air, so provides a time-bound, recent view of what the flying experience is like for consumers. We have continued to track this, and this section details the year-on-year increase seen in satisfaction on this measure.

Additional satisfaction measure:
better enables cross-industry comparison, but since it is a new measure has no historical data available

A common query that users of this research have is, 'how does consumer satisfaction with aviation compare to other industries?'. The answer is not a straightforward one, for two main reasons:

1. Studies in other industries use different approaches for measuring overall satisfaction – this is unsurprising, as they have not been set up specifically to compare against ACS results. Last year's ACS report reflected on similar studies in rail and other transport industries, but noted that this was an imperfect comparison due to differing methodologies, audiences and questions.

2. Each industry operates within a unique context, even within the UK transport sector. Different modes of transport serve distinct roles in consumers' lives, leading to varying expectations and satisfaction drivers. For instance, aviation is often seen as more of a luxury compared to rail or bus travel. Similarly, a bus cancellation may feel less significant than a flight cancellation, as buses are more frequent and don't typically require pre-booking. Even with aligned methodologies and questions, comparisons across modes of transport are always going to be limited by the fact that these are not perfect substitutes for each other.

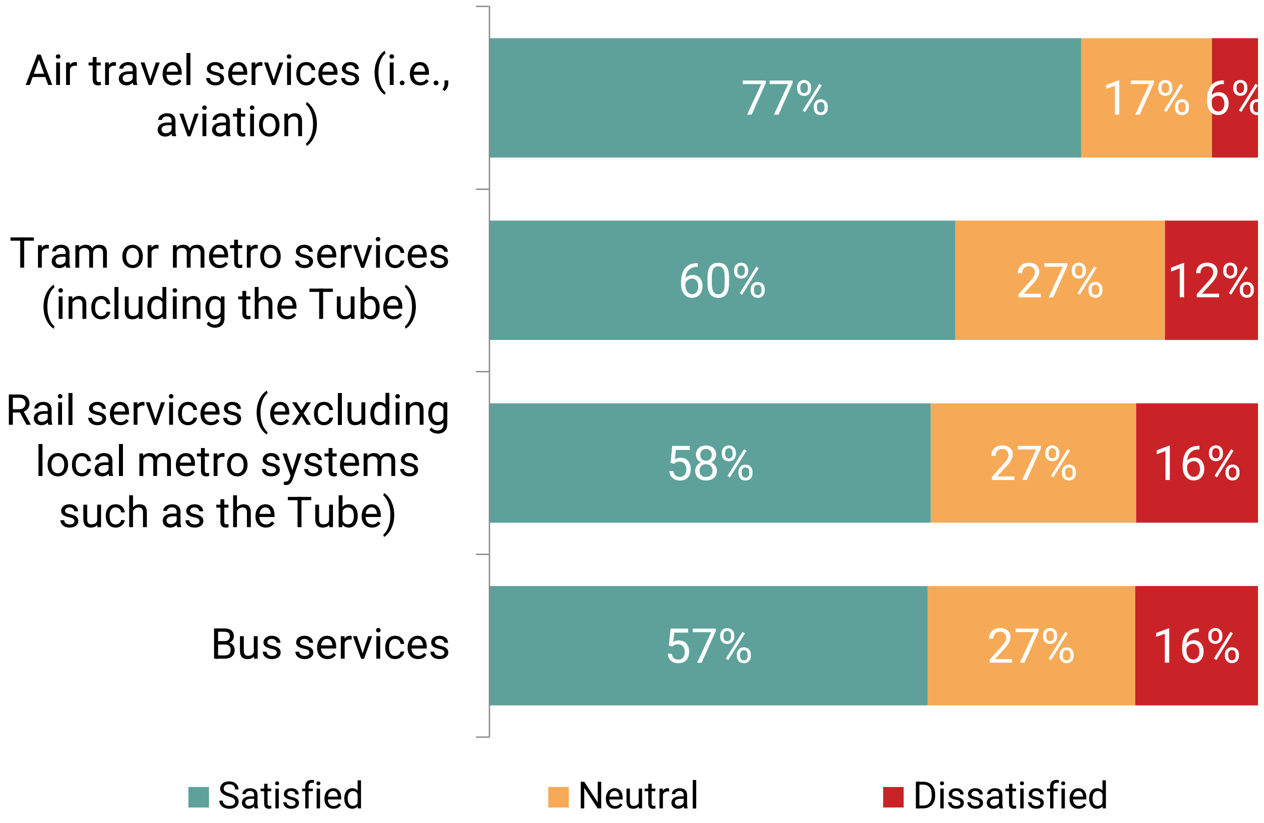
Nevertheless, a goal of this year's research was to *better* understand the cross-industry picture. As such, before we asked any aviation-specific questions in the survey, we asked the following question about four different transport industries:

How satisfied are you with the experience of travelling by the following modes of transport in the UK over the last 12 months?

This new question addresses the first barrier to cross-industry comparison by asking the exact same audience the exact same question about four different transport modes, all within the same survey. However, the second challenge remains: these modes of transport still play different roles in people's lives, which inevitably shapes attitudes and the standards to which they are held. Results should be interpreted with this in mind.

The new satisfaction metric introduced this year suggests that the UK Public are satisfied with aviation in higher numbers than other modes of transport in the UK

Showing satisfaction with different modes of transport in the UK over the last 12 months



Mean score out of 10

7.6

6.8

6.7

6.6

This year saw the introduction of a second satisfaction metric to facilitate cross-industry comparison. This new metric finds that consumers are most satisfied with air travel, with just over three quarters of recent flyers satisfied (77%), compared to around three fifths for other modes of transport.

The CAA's original satisfaction metric (84%) is 7pp higher than this new metric. This is likely because:

1. The original metric measures satisfaction with a respondent's last flight, the new metric measures satisfaction with flying overall.
2. The new metric was asked early in the questionnaire, and so consumers were likely not thinking in detail about specific aspects of their own flying experience.

Monitoring this metric over time will be valuable. The satisfaction levels seen for rail and bus here do not match those seen in other studies (e.g. Transport Focus). However, these studies have limited comparability to the ACS due to different methodologies, audiences and question wording.

Q5. How satisfied are you with the experience of travelling by the following modes of transport in the UK over the last 12 months? (1-10 scale)
Base: All respondents who have travelled by that mode of transport in the last 12 months (n= 1699-2133).

This new metric also allows us to understand how differences in satisfaction across demographic groups compare to patterns seen in other industries

Disability status

Disabled passengers are significantly less likely to be satisfied with aviation than non-disabled passengers (78% and 69%, respectively).*

However, this 9pp gap between the two groups is around the same as the one seen for tram/metro services and rail services (both 8pp). Only bus services see a notably smaller gap (4pp).

Digital confidence

Those with lower digital confidence are significantly less likely to be satisfied with aviation (with a 18pp difference). This gap is around the same size as the one seen for tram/metro services including the Tube (17pp) – but is larger than the gap for rail (14pp) and bus (6pp). This may suggest digital exclusion causes more challenges for aviation and metro travel.

Age

Since we don't have historical data, this new metric can't tell us whether the widening gap in experience we saw last year is unique to aviation.

However, it *does* show that satisfaction tends to be flat across age groups for most modes of transport. Only bus services see a large gap in satisfaction by age, with passengers aged 55+ satisfied in significantly higher numbers than younger groups.

Household income

Those with an annual household income of under £50,000 are significantly less likely to be satisfied with aviation than those with a higher income (81% and 75%). This is true of tram/metro services including the Tube, and rail services – but the gap is most pronounced for aviation. The opposite is the case for bus services – those in the lower income bracket are satisfied in significantly higher numbers.

Q5. How satisfied are you with the experience of travelling by the following modes of transport in the UK over the last 12 months? (1-10 scale). Base: All respondents who have travelled by that mode of transport in the last 12 months (n= 1699-2133). *On this metric, that is. Note that this gap was not as pronounced for the previous satisfaction question. Two key differences are as follows: 1. the first metric asks only about the most recent trip. 2. the first metric is also asked at the same time as a wider range of other flight-related satisfaction questions, whereas *this* question is asked upfront before the respondent has been prompted to reflect on the specifics of their journey.

Section 1.3:
Satisfaction across the passenger journey

Key takeaways from this section:

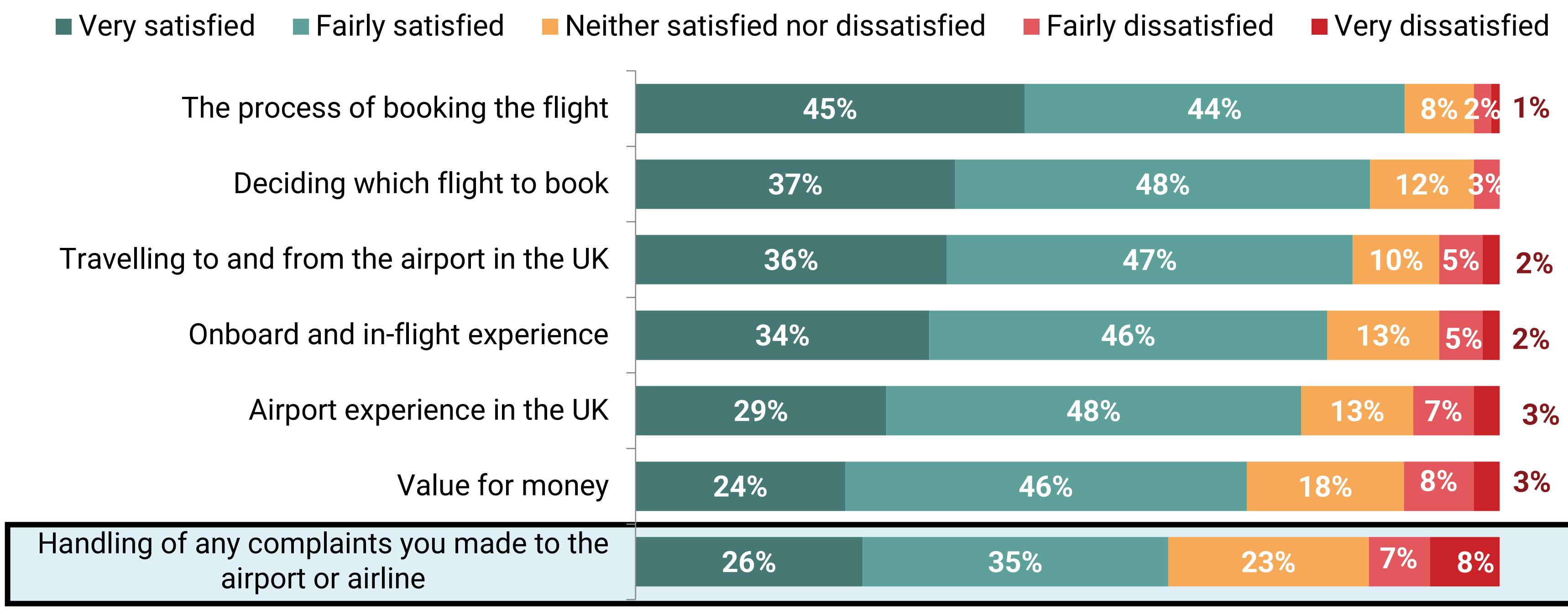
- **Satisfaction with complaints handling – which has declined in recent years – shows significant improvement this year, likely contributing to the rise in overall satisfaction**
- **The booking process continues to be the element of the travel experience which sees highest satisfaction, though most consumers would still like more information around costs**
- **Satisfaction has evened out across the airport experience, with the largest improvements seen at touchpoints that had the lowest satisfaction levels in 2023**

Click the arrows to skip to key takeaways in the previous/next section

Satisfaction with complaints handling sees a significant increase from last year, reversing the post-pandemic decline in this area

Showing satisfaction with various elements of the travel experience amongst recent flyers

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'



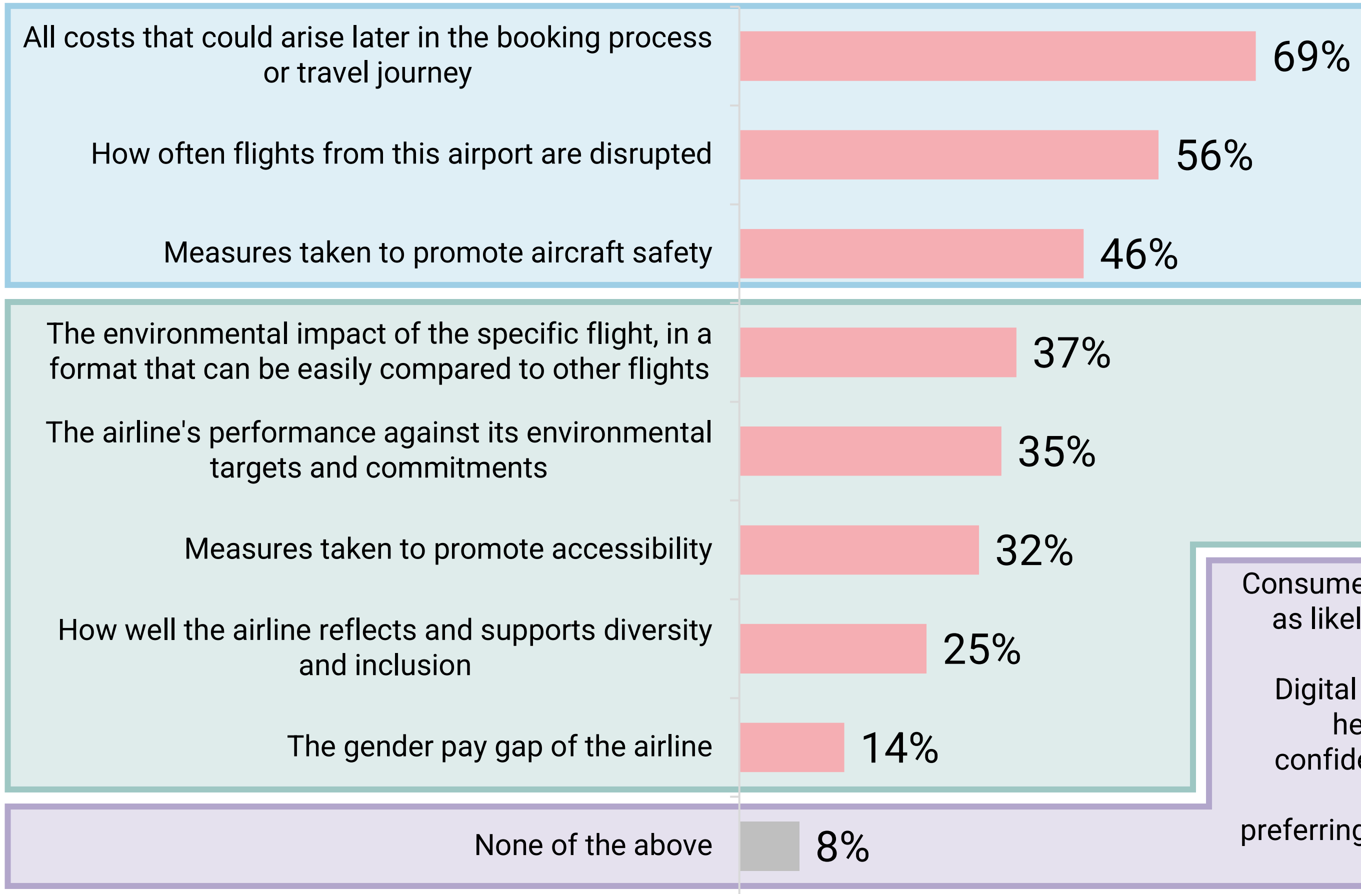
	NET: Satisfied	Change since 2023	Change since 2019
The process of booking the flight	89%	+2pp	+1pp
Deciding which flight to book	85%	+1pp	No change
Travelling to and from the airport in the UK	83%	+2pp	-1pp
Onboard and in-flight experience	79%	+3pp	No change
Airport experience in the UK	77%	+1pp	-2pp
Value for money	71%	+4pp	-6pp
Handling of any complaints you made to the airport or airline	62%	+12pp	-1pp

With a year-on-year increase of 12 percentage points, satisfaction with complaints handling returns to the level seen in November 2019. While it remains the element of the travel experience with the lowest levels of satisfaction, the reversal in this post-pandemic decline is likely a significant factor in the increase overall satisfaction seen this year. Section 2.3 discusses travel disruption and complaints handling in more detail. Value for money also sees notable increase in satisfaction from last year, as can be seen above, but it remains markedly lower than in November 2019, unlike complaints handling.

Q23. 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= 894-2155)

While booking the flight is the area with highest satisfaction levels, consumers would like to see more information, particularly around costs that could arise later

Showing percentage of consumers who would like to see more information in the following areas at the point of booking a flight



These are the three most widely identified areas amongst most consumer groups , including *all* age groups, disabled passengers, passengers at all income levels and digitally excluded passengers

For each of these areas, consumers aged 18-34 are significantly more likely to say they want more information at the point of booking than older passengers.

Consumers aged 55+ are almost three times as likely to want *no* additional information, compared to 18-34s (11% vs. 4%). Digital confidence* is another dividing line here, with 16% of consumers with low confidence saying that they would not like any additional information, perhaps preferring to simplify the booking process as much as is possible.

The previous slide showed that the booking process is the element of the travel experience with which customers are most satisfied. This has also been the case historically. However, there is still room to improve satisfaction further in this area. To that end, this year's research asked consumers about the areas in which they would like to receive more information.

Almost all consumers would like more information in at least one area at the point of booking – with just 8% saying there is no such area. Information around costs that could arise later is what consumers would like to see most, with seven in ten (69%) consumers saying as much.

As the chart shows, however, not all consumers are the same – so tailoring the amount and type of information to different audiences may help meet expectations here.

Q10. In which of the following areas, if any, would you like to see more information at the point of booking? *Defined in this survey with the question 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= 3500).

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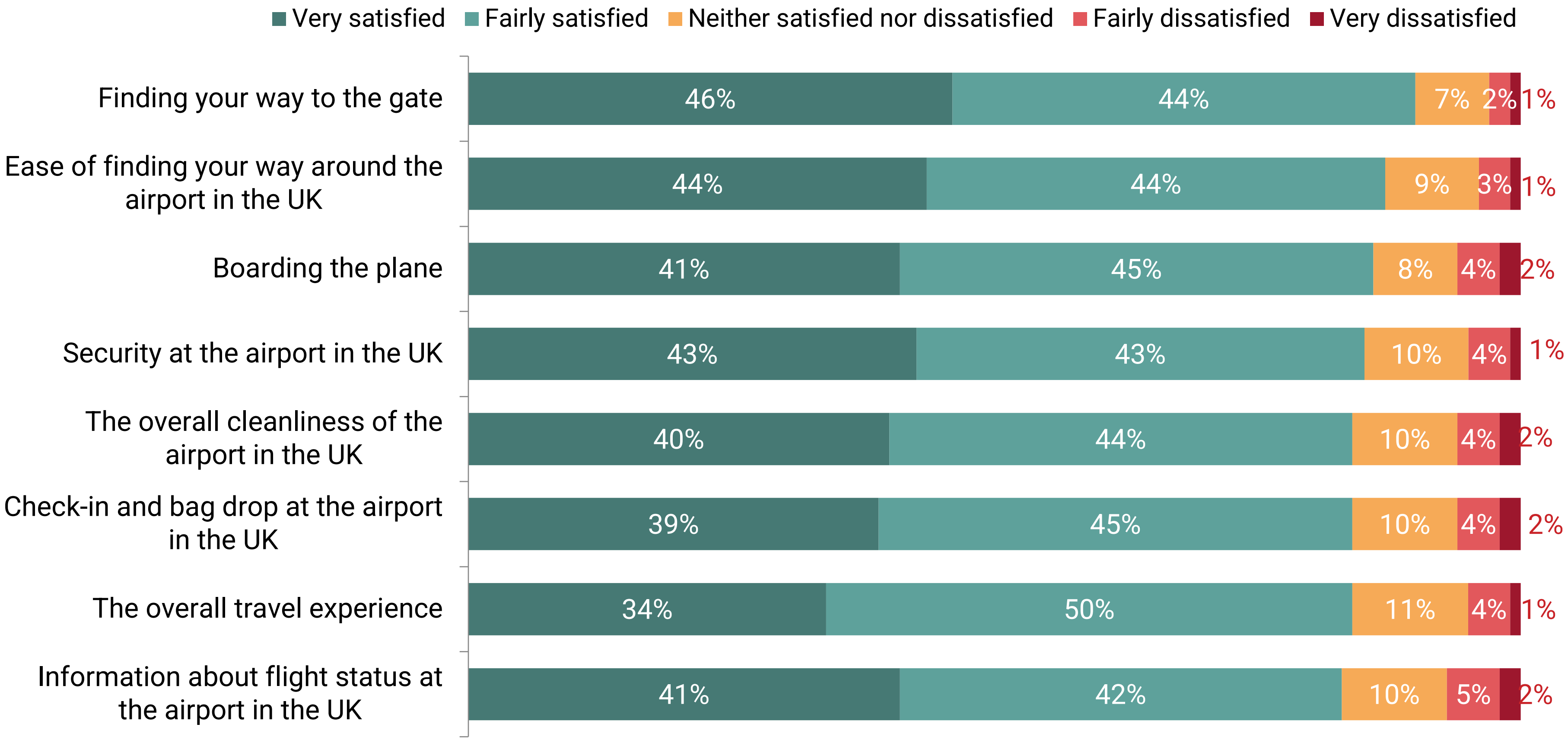
Savanta:

Looking at the more specific touchpoints in the airport customer journey, most see higher levels of satisfaction than in previous years…

Satisfaction with the airport experience – Page 1 of 2 (highest performing areas)

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'



	NET: Satisfied	Change since 2023	Change since 2019
Finding your way to the gate	89%	+2pp	+3pp
Ease of finding your way around the airport in the UK	87%	No change	+1pp
Boarding the plane	86%	+3pp	+2pp
Security at the airport in the UK	85%	+3pp	+3pp
The overall cleanliness of the airport in the UK	84%	+2pp	*
Check-in and bag drop at the airport in the UK	84%	+3pp	+2pp
The overall travel experience	84%	+5pp	No change
Information about flight status at the airport in the UK	83%	No change	No change

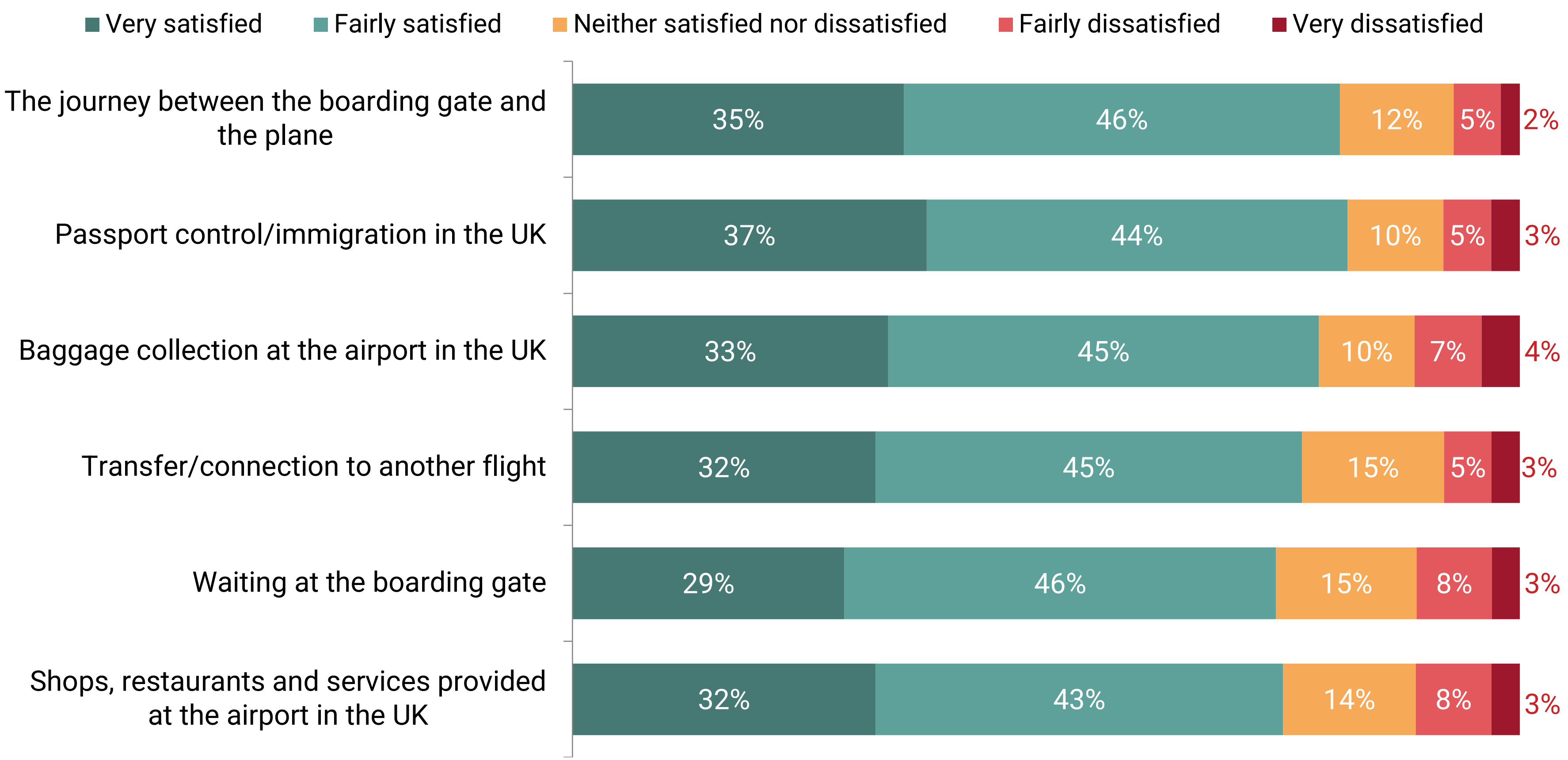
Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements?
Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1011-2159). *Not asked in 2019.

Savanta:

…And it is the touchpoints with the lowest satisfaction levels that see the largest improvements, especially passport control, baggage collection, and connecting flights

Satisfaction with the airport experience – Page 2 of 2 (lowest performing areas)

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'



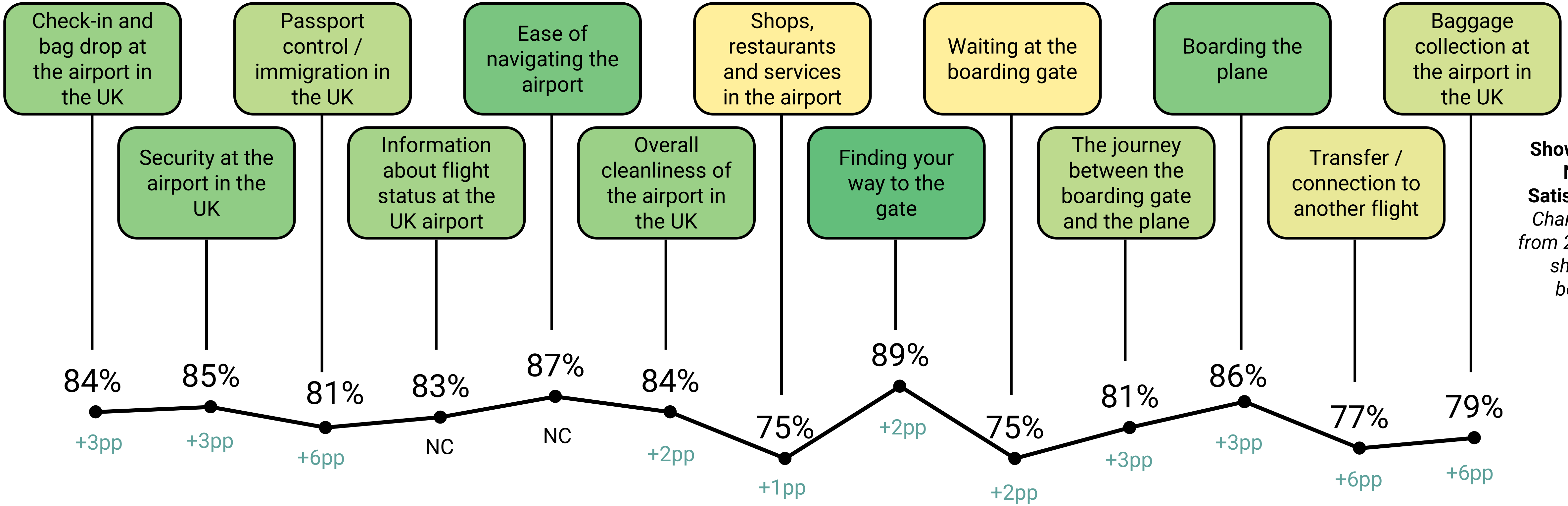
	NET: Satisfied	Change since 2023	Change since 2019
The journey between the boarding gate and the plane	81%	+3pp	+2pp
Passport control/immigration in the UK	81%	+6pp	No change
Baggage collection at the airport in the UK	79%	+6pp	+1pp
Transfer/connection to another flight	77%	+6pp	+3pp
Waiting at the boarding gate	75%	+2pp	-2pp
Shops, restaurants and services provided at the airport in the UK	75%	+1pp	No change

Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements?
Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1011-2159)

Customer journeys are often judged on their most intense points, so this levelling out of satisfaction across the journey may help explain why overall satisfaction has risen

Showing satisfaction with the airport experience, in chronological order

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'



Showing NET: Satisfied
Changes from 2023 shown below

According to a behavioural science principle known as the '**peak end rule**', consumers will typically judge an experience based on its most intense points – whether positive or negative – and the end of that experience. This year, some of the most intense *negative* points in the customer journey have seen the largest increases in satisfaction, as have the two touchpoints that tend to come at the end of the journey chronologically. This 'levelling out' of satisfaction across the customer journey may help explain the increase in satisfaction with the overall travel experience.

Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements?
Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1011-2159)

Digital confidence is linked to significantly lower satisfaction with travel to the airport, the airport experience and the booking process

Recent flyers with low digital confidence are significantly less likely to be satisfied with…

	Confident	Not confident
Travelling to and from the airport	83% (+2pp)	69% (-9pp)
Airport experience in the UK	78% (+2pp)	68% (-2pp)
The process of booking the flight	89% (+2pp)	80% (-2pp)

Changes from 2023 shown below

Satisfaction with the following areas has lowered for digitally excluded passengers whilst having improved for digitally confident passengers.

The satisfaction gap is therefore widening, particularly for travelling to the airport (now a 14pp gap). This aligns with the previous slide with lower satisfaction levels across public transport services in the UK suggesting that the airport is more difficult to access for digitally excluded consumers.

Whilst satisfaction with value for money has stayed the same for digitally excluded passengers (60%), it has improved for digitally confident passengers (71%), meaning the gap as also widened for this metric.

Q23. 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= 2,151-2,157).

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Section 1.4:

The experience of disabled passengers

Key takeaways from this section:

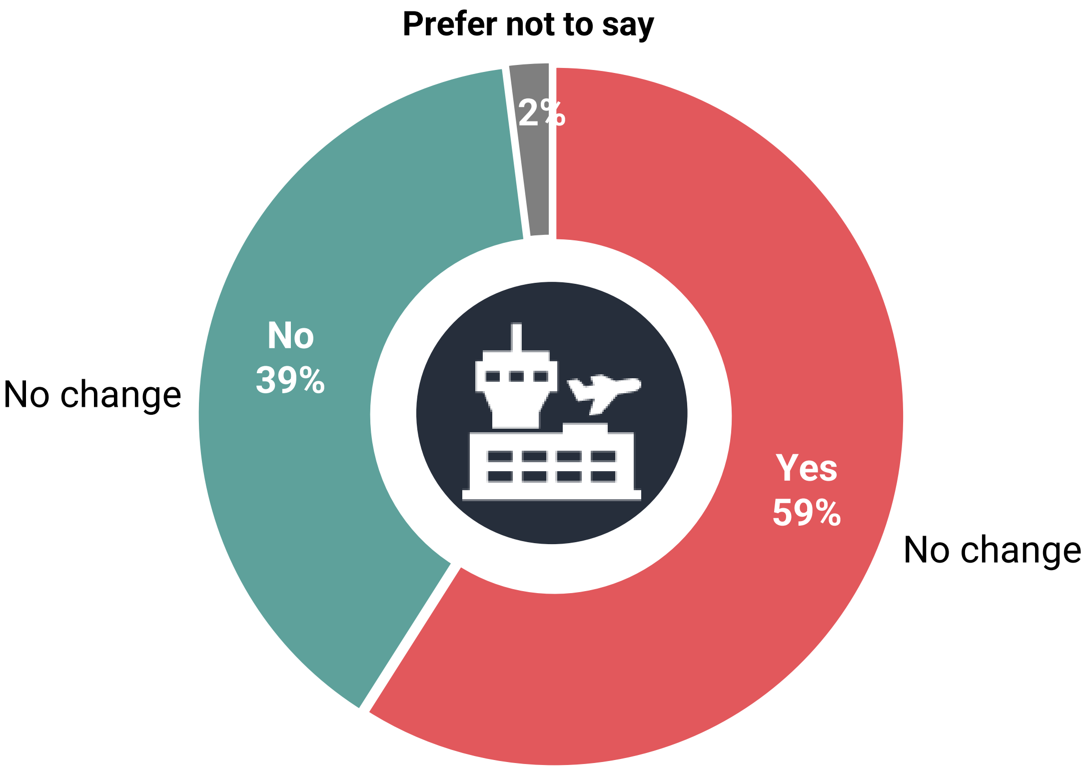
- The gap in overall satisfaction with consumers' most recent flight between disabled and non-disabled consumers has narrowed from 2023 – though there remains a large gap in satisfaction around aviation more broadly
- Marked improvements have been made across the airport experience for disabled passengers, especially at the end of the journey. These touchpoints in particular might explain why the gap in overall satisfaction has narrowed so much
- Whilst satisfaction with these touchpoints sees improvement, several broader metrics see a widening gap in satisfaction between disabled and non-disabled passengers – especially value for money

Click the arrows to skip to key takeaways in the previous/next section

The proportion of disabled passengers requiring assistance is rising

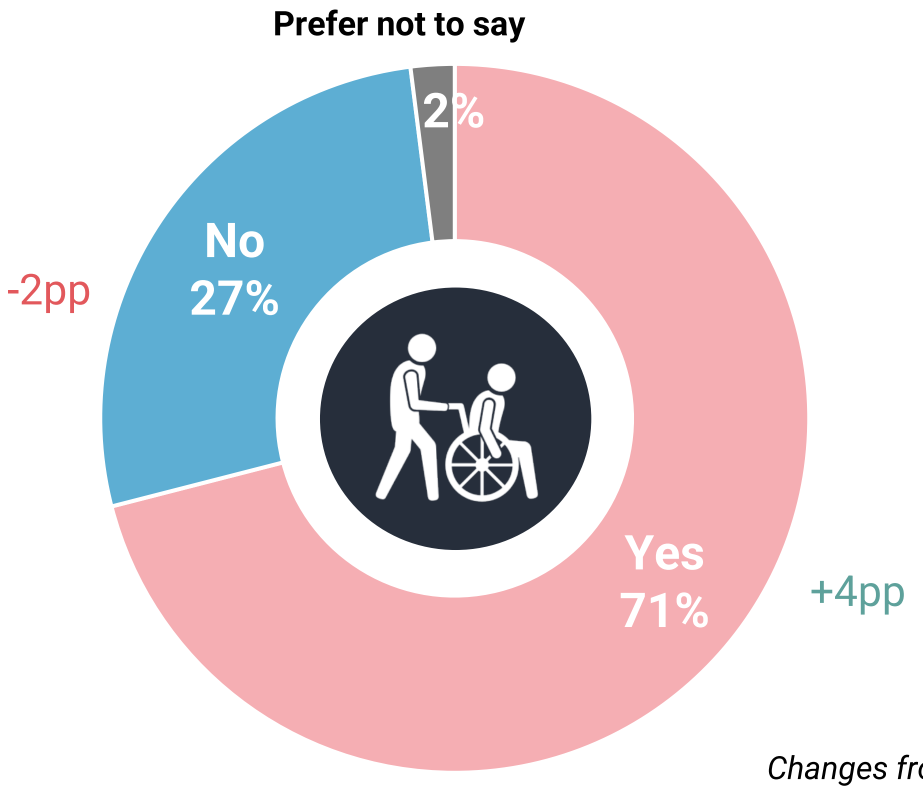
Difficulty in accessing/using airports or flying

All who have a disability



Would assistance be required?

All who have a disability which makes flying difficult



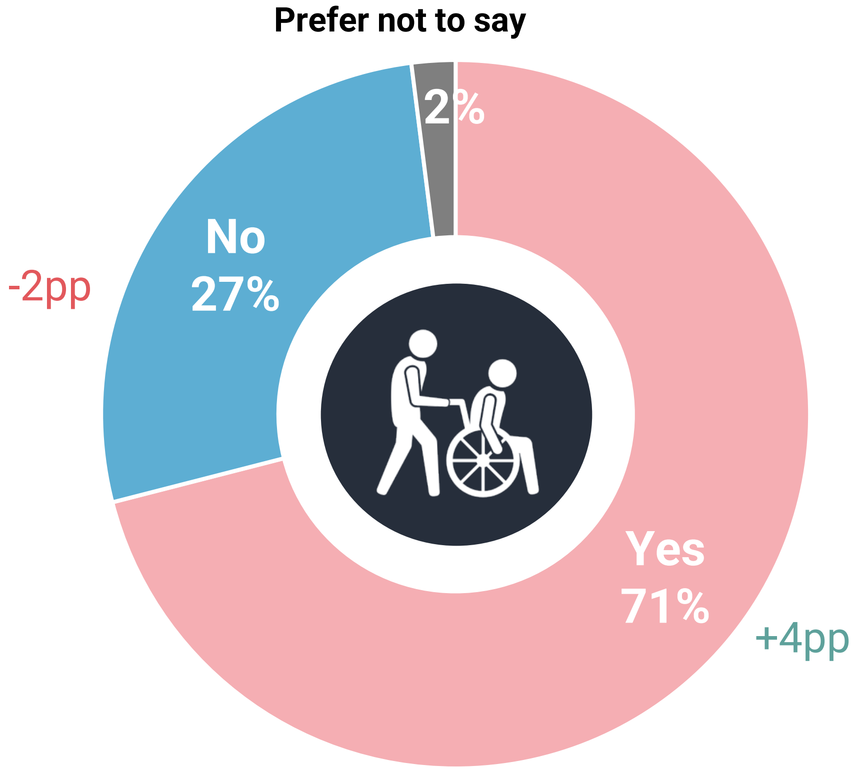
Changes from 2023 shown below

Q12. Does/would your disability or health condition make accessing and/or using airports or flying difficult? Base: All who have a disability (n=373). Q15. 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=396).

Consumers with a non-hidden disability and physical disabilities or health conditions are more likely to require assistance

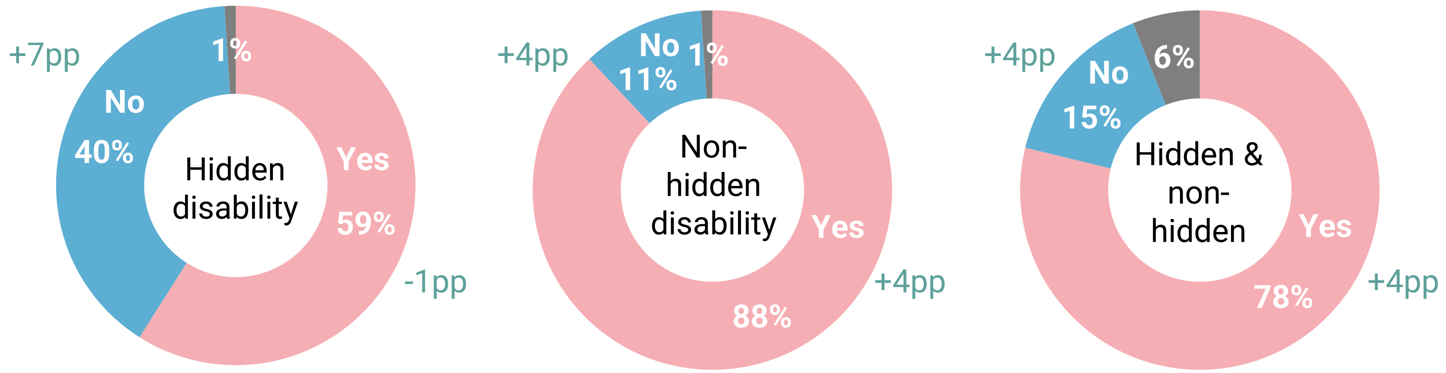
Would assistance be required?

All who have a disability which makes flying difficult

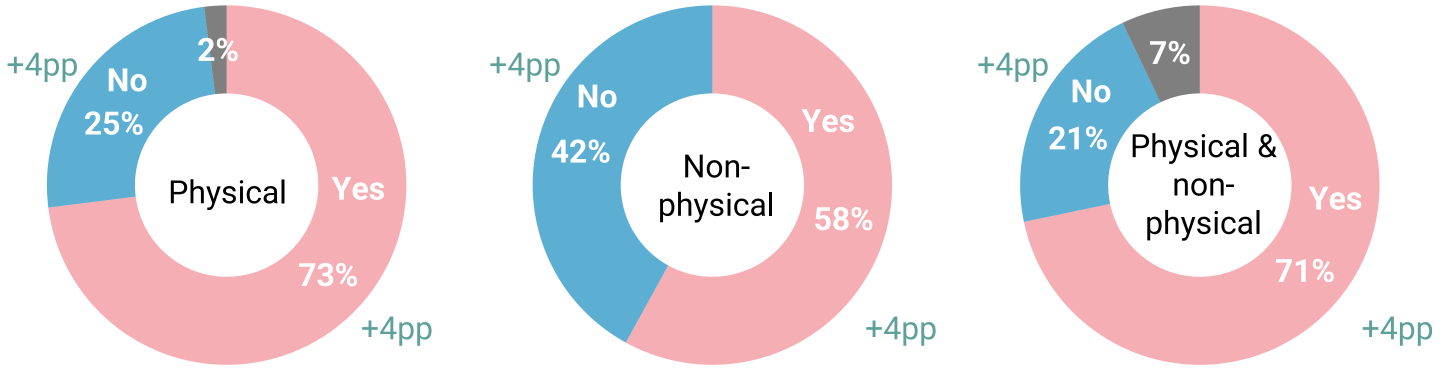


Changes from 2023 shown below

Assistance is required more amongst consumers with non-hidden disabilities, and those with both hidden *and* non-hidden disabilities:



And assistance is required more amongst consumers with physical disabilities, and those with both physical *and* non-physical disabilities:



Q15. 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 whose disability or health condition makes accessing and / or using airports or flying more difficult (n=396)

Savanta:

Disabled consumers remain significantly less likely to have flown in the last 12 months, though the gap in overall satisfaction with the most recent flight between disabled and non-disabled consumers has narrowed

Showing flying behaviour and satisfaction with the overall travel experience on the most recent flight amongst recent flyers, by disability status

Percentage-point changes since 2023 shown

	All consumers	Disability	No disability
Flown in last 12 months	62% (+8pp)	41% (+7pp)	67% (+7pp)
Satisfied with most recent trip (recent flyers only)	84% (+5pp)	82% (+8pp)	84% (+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, Oct-24 (n=3,500) including those with (n=673) and without (n=2781) a disability or health condition. Q24.14. 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=2,163), including those with (n=275) and without (n=1874) a disability or health condition.

Regarding satisfaction with aviation more widely, however, there is still a large gap between disabled and non-disabled consumers – and this gap is slightly more pronounced than the one seen with other modes of transport

Showing satisfaction with the following modes of transport in the UK over the last 12 months, by disability status

	Disability	No disability	Gap in satisfaction
Air travel services (i.e., aviation)	69%	78%	**9pp**
Tram or metro services (including the Tube)	54%	62%	8pp
Rail services (excluding local metro systems such as the Tube)	51%	59%	8pp
Bus services	54%	58%	4pp

Q5. How satisfied are you with the experience of travelling by the following modes of transport in the UK over the last 12 months? (1-10 scale)
Base: All respondents who have travelled by that mode of transport in the last 12 months (n=1699-2133).

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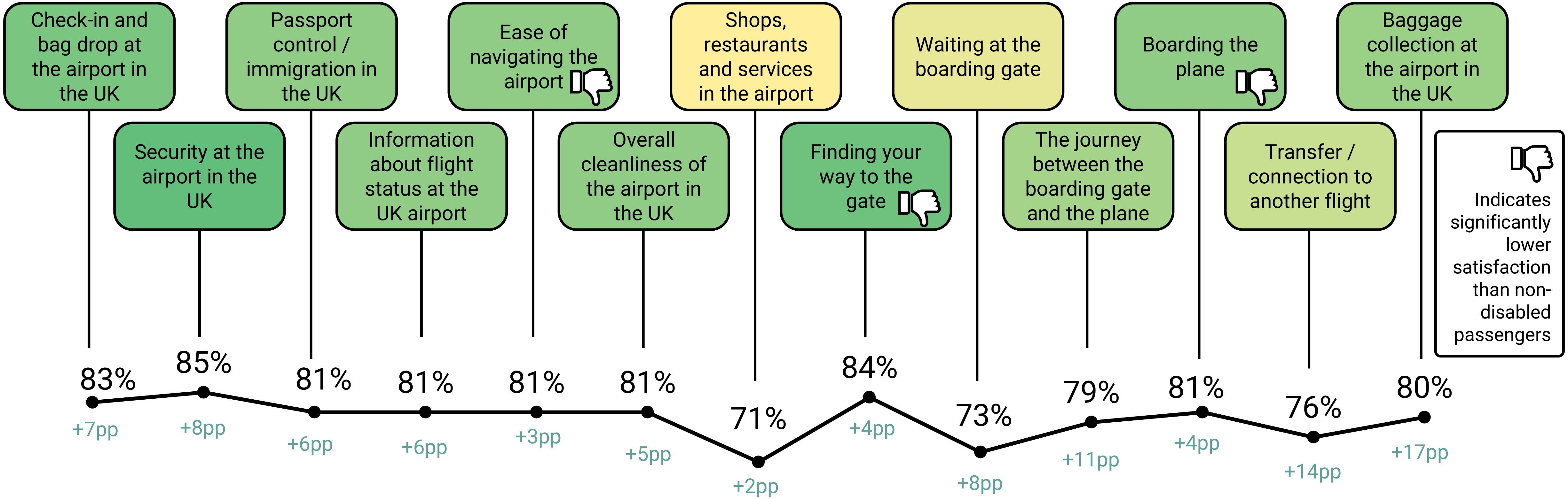
Marked improvements have been made across the airport experience for disabled passengers, especially at the end of the journey

Showing satisfaction with the airport experience, in chronological order (Consumers with disabilities only)

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'

Showing
NET: Satisfied
Changes from 2023 shown below

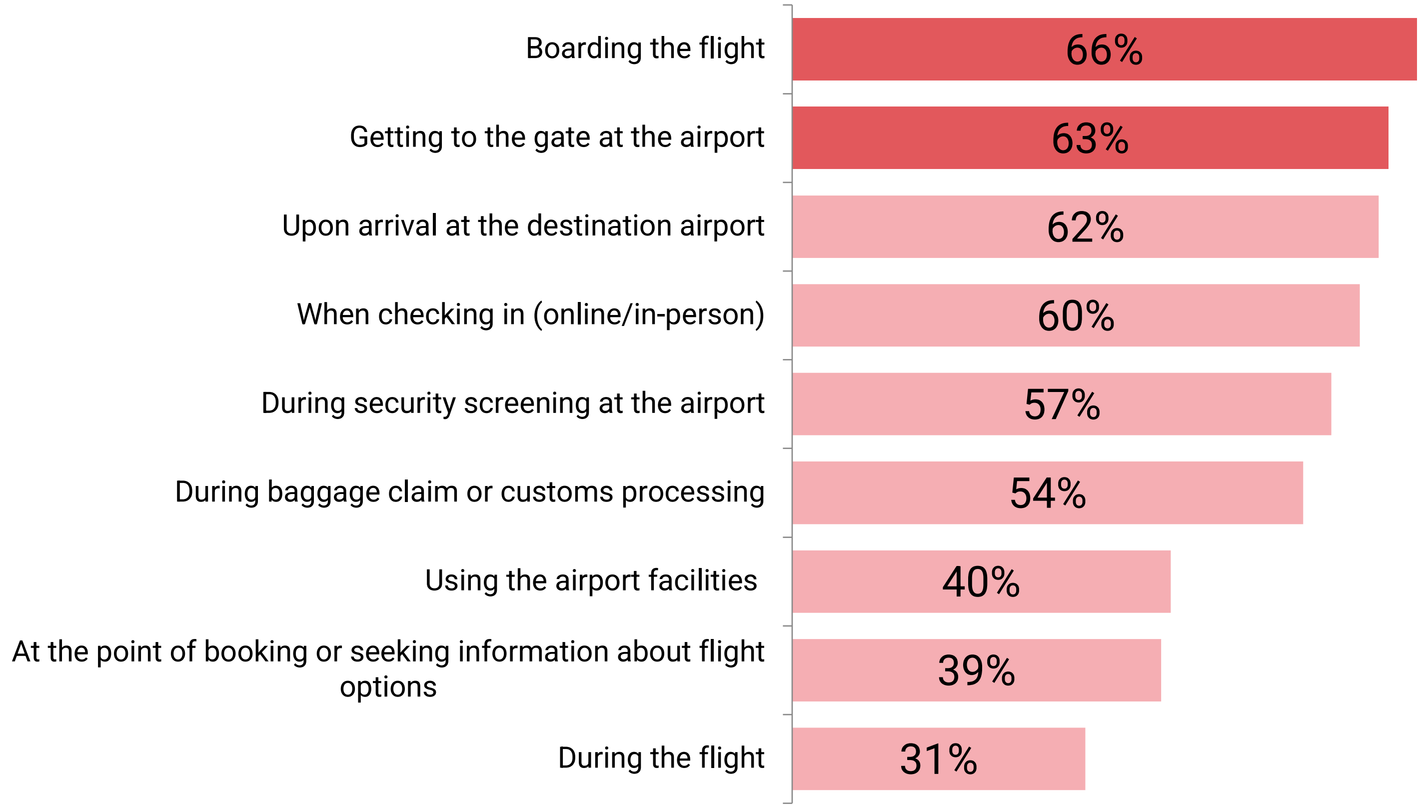


As discussed in Section 1.3, the principle known as the '**peak end rule**' suggests that consumers will typically judge an experience based on its most intense points and on the end of that experience. The *last* two touchpoints in the airport experience see very large increases in satisfaction amongst disabled consumers this year – much larger than the increases seen amongst *all* consumers. This may help explain why the gap in satisfaction with the most recent journey has narrowed between disabled and non-disabled consumers.

Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements?
Base: All consumers with a disability or health condition who have flown in the last 12 months, excluding DK and NA responses (n=275).

The touchpoints where disabled passengers are significantly less likely to be satisfied are also the stages at which they would most value assistance

Stages of the journey where passengers would find assistance from the airport or airline helpful
Showing percentage who say the following



Two thirds of consumers who require specific assistance when flying say that they find assistance most helpful when boarding the plane (66%) and when getting to the gate (63%). These are also two of the three touchpoints in the airport journey where satisfaction is significantly lower amongst disabled consumers than non-disabled consumers.

While the data shows that most disabled passengers don't require assistance during the booking process, at this stage of the journey they *would* like more information about assistance available to them later in the journey: disabled consumers are significantly more likely to say that they want more information around the measures taken to promote accessibility at the point of booking a flight (46% vs. 29% of non-disabled passengers).

Q16. At which stages of the journey, if any, would you find assistance from the airport or airline helpful? Base: All respondents whose disability or health condition would mean they requested specific assistance when making a flight (n=280). Q10. In which of the following areas, if any, would you like to see more information at the point of booking? Base: All respondents (n=3500).

Whilst satisfaction with these touchpoints see improvement, three broader metrics see a widening gap in satisfaction between disabled and non-disabled passengers

Disabled recent flyers are significantly less likely than non-disabled passengers to be satisfied with…

Changes from 2023 shown below

	Disability	No disability
Onboard and in-flight experience	75% (-2pp)	80% (+4pp)
Airport experience in the UK	69% (-1pp)	78% (+1pp)
Value for money	64% (-2pp)	72% (+5pp)

There are three satisfaction metrics which see significantly lower scores amongst disabled passengers – two concerning the flying experience, and one cost.

The largest gap is in satisfaction with value for money, with only 64% of disabled passengers satisfied compared to 72% of non-disabled passengers. This may reflect the added costs often associated with flying for disabled people, such as charges for mobility aids, specialised seating, or additional assistance services. If these costs aren't met with equivalent improvements in service or accessibility, they may contribute to the perception that air travel is less affordable or equitable for disabled passengers.

Q23. 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=2,163), including those with (n=275) and without (n=1874) a disability or health condition.

Section 2.1:

Consumer priorities and perceived industry priorities

Key takeaways from this section:

- **We asked consumers to rank several different areas in terms of importance, to understand the relative priority they afford to each. The exercise revealed reducing the cost of flying to be the most widespread priority amongst consumers, though this is far from universal – only around a quarter (27%) of consumers would prioritise this above all other areas**

- **Consumers do not feel the industry's priorities align with their own, particularly in reducing the cost and environmental impact of flying – two areas where relatively few believe the industry is genuinely committed**

Click the arrows to skip to key takeaways in the previous/next section

Why are we trying to understand consumer priorities?

With new Government priorities and many aviation behaviors and attitudes beginning to resemble pre-pandemic patterns once again, this instalment of the Aviation Consumer Survey asks a new, forward-looking question: ***which areas do consumers want the industry to focus on?***

With this in mind, we asked two new questions:

1. **Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas?**

2. **To what extent do you trust that the aviation industry is genuinely committed to those same areas?**

These questions aim to provide a *comparative* view of what consumers care about – the goal of this exercise is not to understand merely 'is reducing costs important to consumers?', but rather 'when asked to choose between reducing costs and other areas, which is *most* important to consumers?'.

Part 2 of this report does not aim to prescribe specific actions in response to these findings. Rather, the goal is to *start* these conversations about where the industry should focus in the coming years, by equipping policymakers and industry decision-makers with the insights needed to reflect on what they can do within their own roles to improve the consumer experience.

When asked to choose between six focus areas for the industry, consumers prioritise reducing the cost of flying in higher numbers than any other area

How the UK public would prioritise areas for investment for the aviation industry over the next 12 months

	Ranked as number-one priority	Ranked in top three priorities
Reducing the cost of flying	27%	60%
Finding solutions to minimise disruption and delays	15%	58%
Developing new technology to improve comfort and efficiency at airports	16%	51%
Reducing the environmental impact of flying	22%	46%
Improving the standard of customer service	10%	43%
Speeding up journey times through new technology	7%	33%

Whether focusing on consumers' number-one priority or considering their top-three overall, reducing the cost of flying emerges as the area most believe should be prioritised for investment over the next 12 months – providing a clear view on the perceived comparative importance of these areas. On both measures, this is the most widespread priority amongst both 18-34s and 35-54s.

Reducing the environmental impact of flying follows closely as the next most frequently cited number-one priority (22%), although it does not rank as highly when looking at consumers' top-three priorities. Notably, this is the most widespread number-one priority amongst consumers aged 55 and over, with over a quarter saying as much (26%).

Minimising disruption, while not the most widespread number-one priority, ranks within the top-three priorities for almost as many consumers as reducing costs. This appears in the top three priorities of those aged 55+ in higher numbers than any other area, including reducing costs. Moreover, a quarter of those who believe flying has worsened over the last decade (24%) say minimising disruption should be the number-one focus, a significantly higher proportion than amongst those who think flying has improved (15%).

While improving the standard of customer service is not a widespread priority on either measure, it is instructive that digitally excluded consumers (15%) and consumers in Northern Ireland (14%) are most likely to identify this as the number-one priority for investment, reflecting the lower overall satisfaction amongst these consumers seen in Part 1.

Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas?
Base: All respondents (n=3,500).

Even though reducing costs is the most widespread priority, this is far from universal, with only a quarter saying this is more important than any other area

Just a quarter of consumers (27%) rank **reducing the cost of flying** as most important for the industry to prioritise.

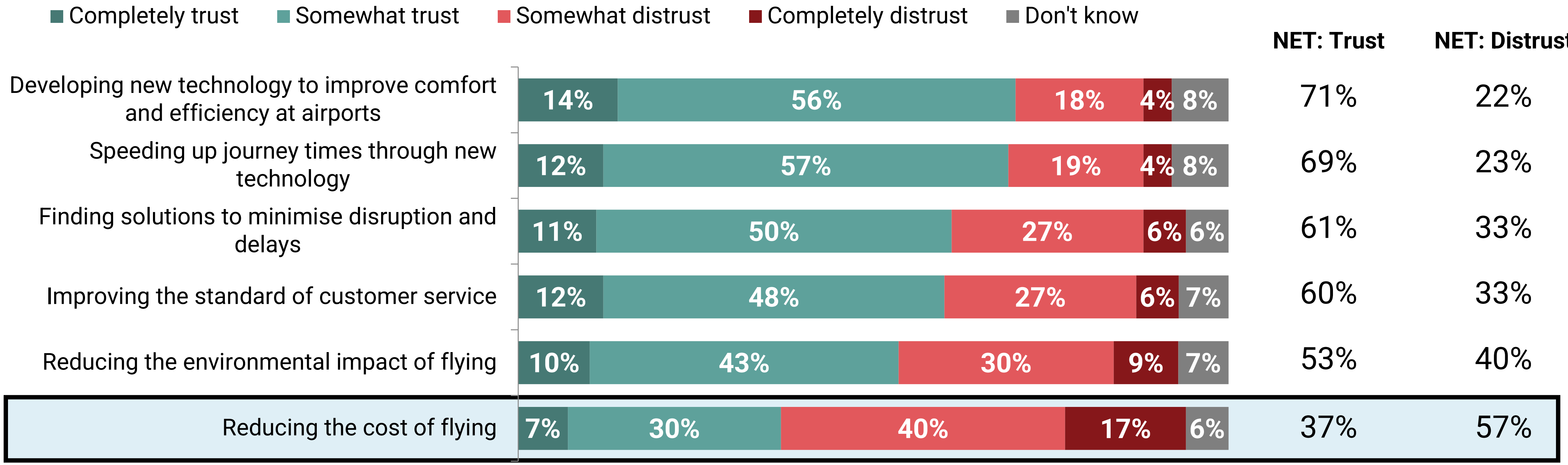
Given that value for money remains an area of relatively low satisfaction, one might expect nearly all consumers to see reducing the cost of flying as the number-one priority for the industry.

It is striking that, even though it is the most widespread priority, this is far from universal – with the vast majority of consumers identifying another area as being a greater priority.

Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas?
Base: All respondents (n=3,500).

Most consumers do not regard the industry as being genuinely committed to reducing the cost of flying

Trust that the aviation industry is genuinely committed to the following priorities



In addition to testing the comparative importance of these areas to consumers, we tested the extent to which consumers trust that the aviation industry is genuinely committed to each. While reducing the cost of flying was the most widespread personal priority, it is the area in which *fewest* consumers regard the industry's commitment as genuine. One might take the view that the industry should not be *expected* to be committed to reducing costs and so these results are not particularly surprising. However, given that trust levels here are strongly correlated with overall satisfaction, it appears to be the case both that many consumers expect the industry to be committed to cost reduction to at least some extent, and that – where consumers do not perceive this to be the case – it has an impact on wider perceptions including satisfaction.

Q8. Thinking about those same areas, to what extent do you trust that the aviation industry is genuinely committed to…?
Base: All respondents (n=3,500).

There are clear demographic dividing lines here, with younger, higher-income and digitally confident consumers more trusting of the industry's commitment to *all* six areas in significantly higher numbers

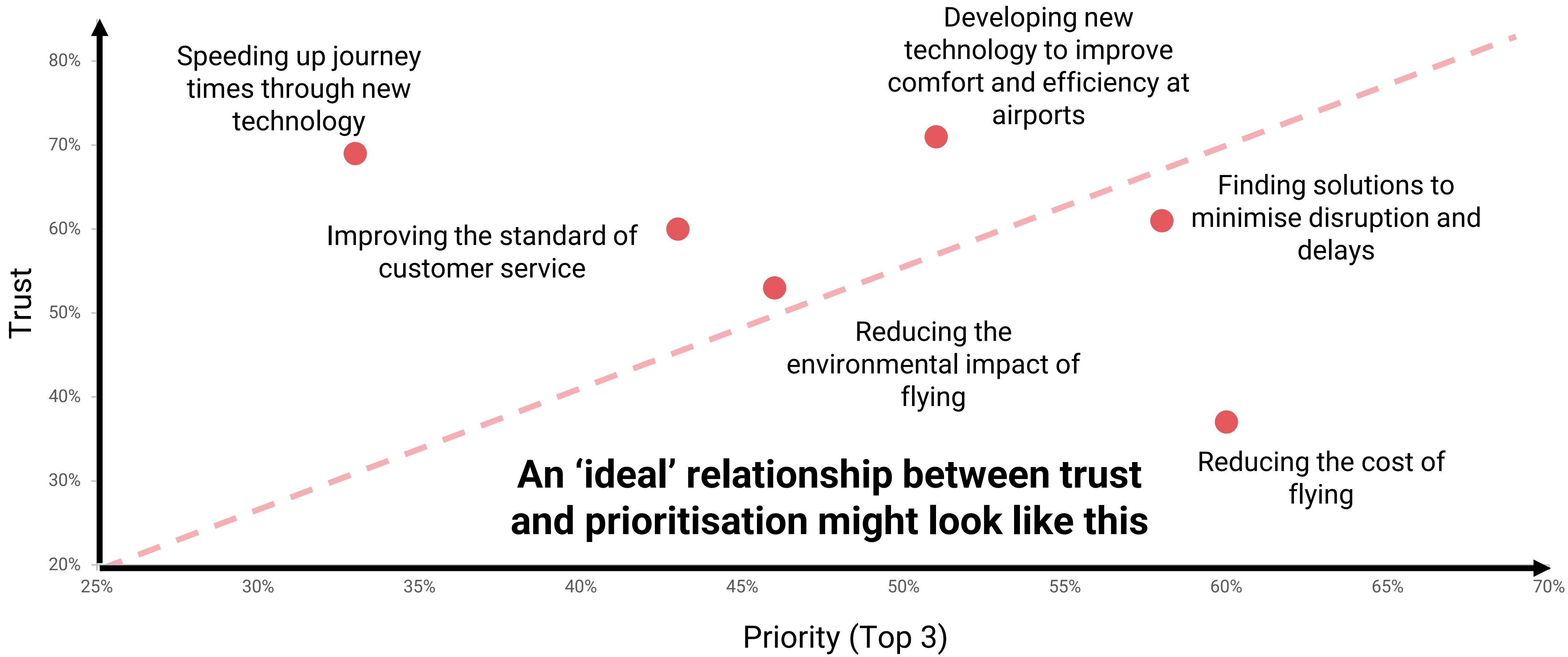
Showing percentage of each demographic group which trusts that the aviation industry is genuinely committed to the following priorities

		Age			Annual household income		Digital confidence	
	Overall	18-34	35-54	55+	Below £50k	£50k or over	Confident	Not confident
Developing new technology to improve comfort and efficiency at airports	71%	78%	72%	64%	68%	77%	72%	50%
Speeding up journey times through new technology	69%	76%	69%	63%	67%	73%	70%	52%
Finding solutions to minimise disruption and delays	61%	67%	63%	55%	59%	66%	62%	47%
Improving the standard of customer service	60%	71%	61%	51%	59%	64%	61%	43%
Reducing the environmental impact of flying	53%	59%	55%	47%	51%	57%	54%	42%
Reducing the cost of flying	37%	50%	39%	26%	35%	40%	37%	21%

Q8. Thinking about those same areas, to what extent do you trust that the aviation industry is genuinely committed to…? Base: All respondents (n=3,500), including those aged 18-34 (n=956), 35-54 (n=1145), and 55+ (n=1398), those with an annual household income or below £50,000 (n=2096) and with an income of £50,000 or over (n=1166), and those with (n=3314) and without (n=179) digital confidence.

Consumers do not perceive the industry's priorities to be aligned with their own…

Prioritisation of areas vs. trust in the aviation industry's commitment to them being genuine

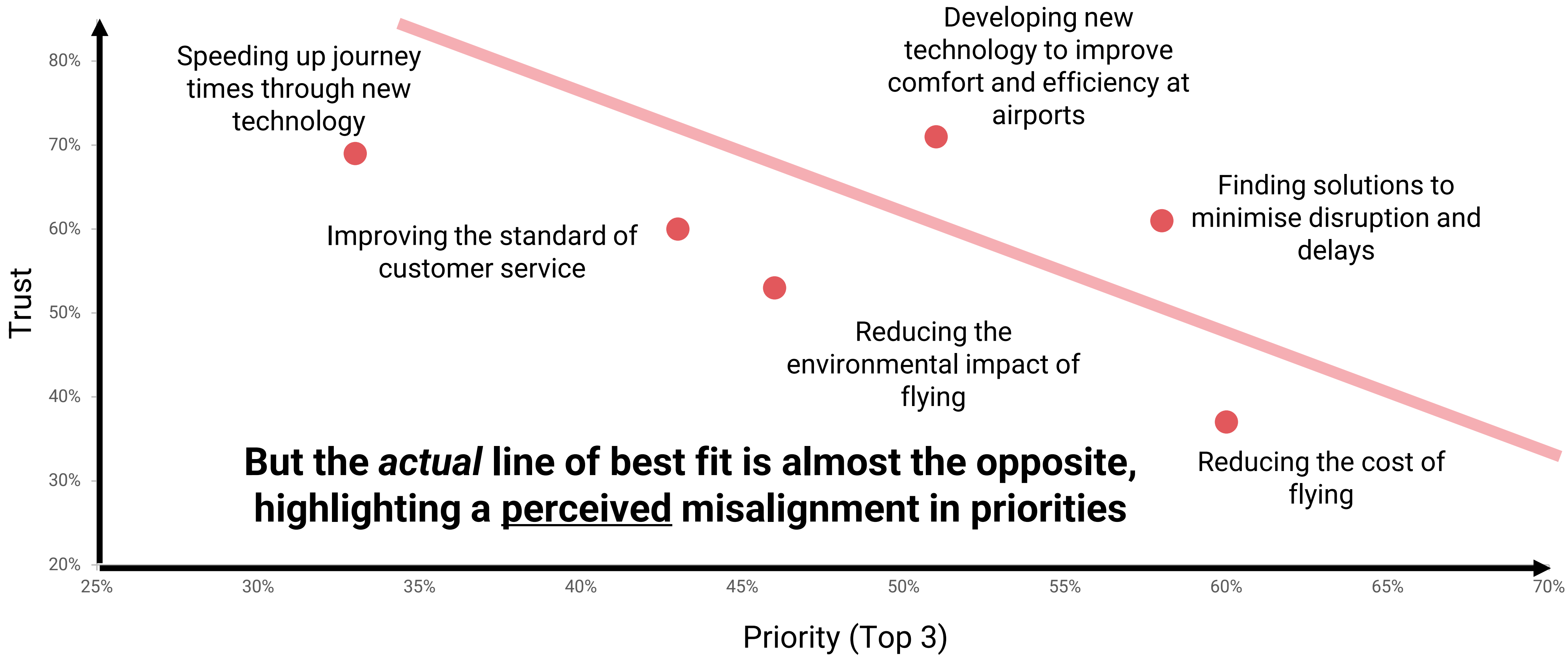


Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas? Q8. Thinking about those same areas, to what extent do you trust that the aviation industry is genuinely committed to…? Base: All respondents (n=3,500).

Savanta:

…With reducing the cost of flying being the area where consumer priorities are least aligned with levels of trust in the industry's commitment

Prioritisation of areas vs. trust in the aviation industry's commitment to them being genuine



Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas? Q8. Thinking about those same areas, to what extent do you trust that the aviation industry is genuinely committed to...? Base: All respondents (n=3,500).

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Savanta:

The remainder of this report further discusses consumers' three main priority areas

The remaining three sections of this report consider the highest priority areas for consumers in turn:

1. **Value for money and reducing the cost of flying**

2. **Travel disruption and complaint handling**

3. **Aviation and the environment**

Insights in these areas can further inform conversations about where the industry's focus should lie, providing a clearer picture of consumer expectations as the sector looks to the future.

Section 2.2:

Value for money and reducing the cost of flying

Key takeaways from this section:

- **Value for money is the only element of air travel tested where satisfaction still lags significantly behind pre-pandemic levels**
- **Disabled and digitally excluded passengers are significantly less satisfied with value for money than their counterparts, with this gap widening since last year**
- **Just three in ten report facing hidden charges, though they have a marked impact on satisfaction, both with value for money and the overall travel experience**

Click the arrows to skip to key takeaways in the previous/next section

As seen earlier, reducing the cost of flying is the area where consumers perceive their priorities to be most out of step with the industry's

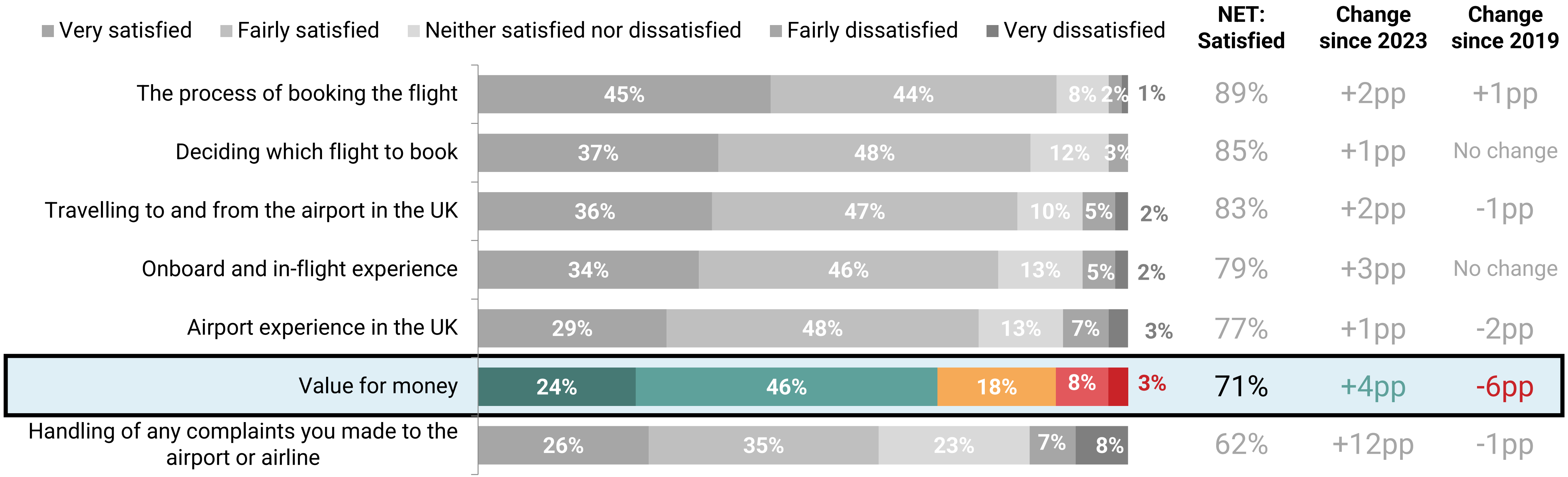
Prioritisation of areas vs. trust in the aviation industry's commitment to them being genuine

Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas? Q8. Thinking about those same areas, to what extent do you trust that the aviation industry is genuinely committed to…? Base: All respondents (n=3,500).

This might partly be explained by the fact that value for money is the only element of air travel where satisfaction still lags significantly behind pre-pandemic levels

Showing satisfaction with various elements of the travel experience amongst recent flyers

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'



After complaints handling, value for money sees the largest year-on-year increase in satisfaction of any of the elements of travel experience tested, rising from 67% of consumers satisfied in 2023 to 71% this year. However, satisfaction levels remain well short of the levels seen in November 2019, which is not true of any other element tested. This may partly explain why reducing the cost of flying is the most widespread priority for consumers *and* the area which consumers are least likely to trust that the industry is genuinely committed to addressing.

Q23. 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= 894-2155)

Disabled and less digitally confident passengers are significantly less satisfied with value for money than their counterparts, with this gap widening since last year

Showing satisfaction with value for money amongst recent flyers

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'

		Digital confidence			Disability status		
	Overall	Confident	Not confident	Gap in satisfaction with value for money	Disabled	Not disabled	Gap in satisfaction with value for money
October 2023	67%	67%	60%	7pp	66%	67%	1pp
October 2024	71%	71%	60%	11pp	64%	72%	8pp

Digital confidence: Gap has grown since last year

Disability status: Gap has grown since last year

The satisfaction gap between digitally confident and digitally less confident passengers has grown from 7 percentage points in 2023 to 11pp in 2024. This increase may in part suggest that many money-saving measures available to consumers are increasingly seen as requiring some level of digital confidence and aptitude (e.g., avoiding hidden charges when booking a flight). In line with this, digitally less confident consumers are less likely than other consumers to have taken any measures to save money on their most recent trip (50% vs. 54% amongst digitally confident consumers) and are *eight* times less likely to take an indirect flight to save money (8% vs. 1%).

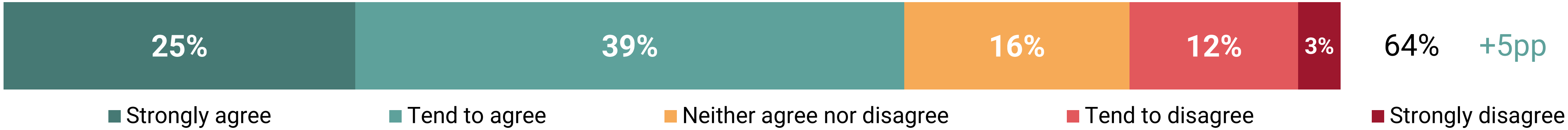
A similarly pronounced gap in satisfaction with value for money exists between disabled passengers and non-disabled ones (8pp), albeit one that did not exist in 2023. In contrast to digitally less confident passengers, disabled passengers are also significantly more likely than their non-disabled counterparts to take several cost-saving measures, including flying at a less convenient time (30% and 22% respectively), opting for a 'no frills' airline (23% vs 17%), and choosing a less convenient departure airport (17% vs. 10%).

Q23. How satisfied or dissatisfied were you with value for money? Q21. Still thinking about this most recent flight, did you do any of the following to save money on your trip?
Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 2153), including those with (n=2069) and without (n=84) digital confidence, and those with (n=272) and without (n=1867) as disability or health condition.

More consumers than ever say it is easy to make cost comparisons between flights before booking, but there appears to be a wariness about charges emerging *after* this point

Two thirds of consumers (64%) agree with the following statement:

'When searching for a flight it is easy to find information (including how much it costs to travel with different airlines) and to make comparisons between them'



NET: Agree	Change since 2023	Change since 2019
64%	+5pp	+8pp

In line with satisfaction around value for money however, consumers lacking digital confidence (39%) and disabled consumers (57%) are significantly less likely to agree that this comparison is easy. Those consumers aged 55 and over are also significantly less likely to agree (56%). At an overall level, however, agreement levels are high.

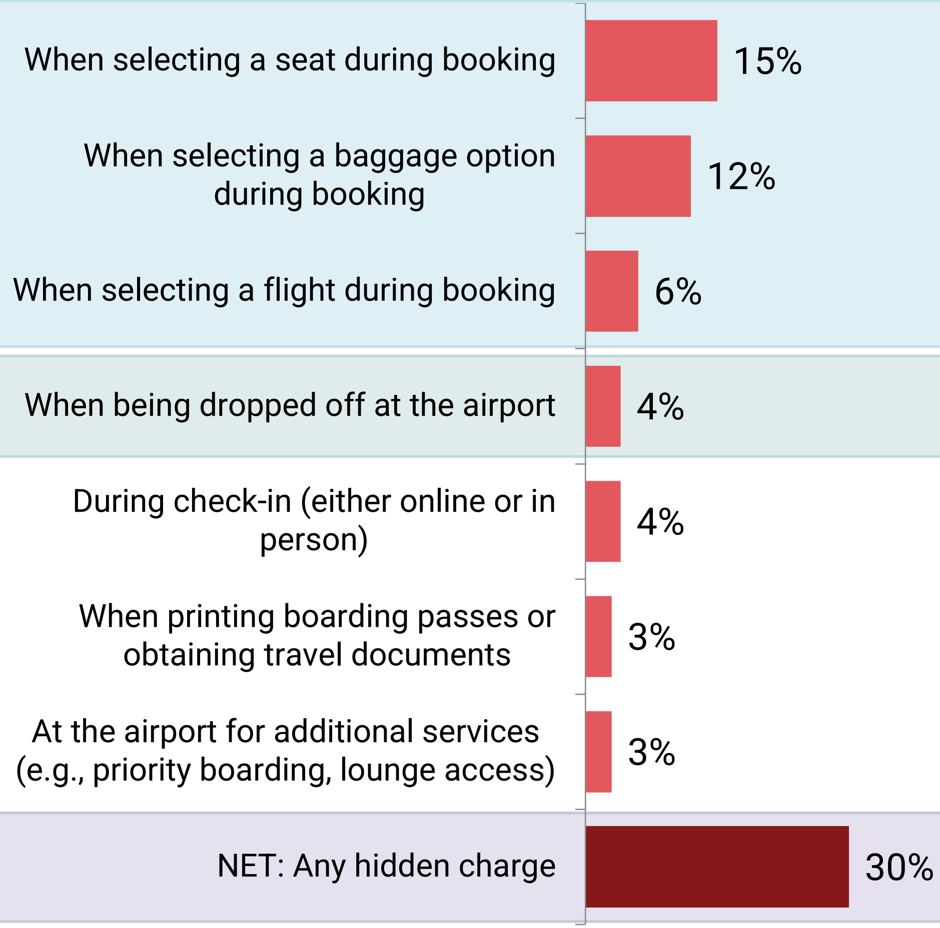
Despite this, most consumers would like *more* information at the point of booking around costs. Specifically, seven in ten (69%) consumers would like more information around all costs that could arise later in the booking process or travel journey. This may suggest a wariness around 'hidden' costs amongst the public.

This desire for more information about later charges is most pronounced amongst consumers aged 55 and over (71%).

Q9. Please tell us to what extent you agree or disagree with each of the statements (note that question wording has changed since 2023). Q10. In which of the following areas, if any, would you like to see more information at the point of booking? Base: All respondents (n=3,500).

Three in ten consumers report facing a hidden charge on their last flight, though experiencing this has a marked impact on satisfaction with value for money and the overall travel experience

Showing percentage of consumers who reported the following hidden charges on their most recent trip



Hidden charges are most widely reported at the initial booking stage. Airlines may advertise low base fares while withholding the full cost of essential services until later in the process. Complex pricing structures and pre-selected add-ons further contribute to the perception of hidden fees, leaving some customers feeling misled.

79% of those who faced drop off charges report that they have *increased* in the past few years.

Just two thirds (64%) of consumers who faced a hidden charge are satisfied with value for money, compared to three quarters (74%) of consumers who did not face a hidden charge.

Similarly, consumers who experience a hidden charge are less likely to be satisfied with the overall flight experience than those who do not (77% vs. 88%).

Q22. Did you face any hidden, unexpected, or additional charges on your most recent trip? Base: All who have flown in the last 12 months (n=2163). Showing top 7 answers only.
Q22b. Have you noticed any changes in drop-off charges at airports in the past few years? Base: All who have faced drop off charges, excluding DK (n=91).

Disabled passengers are significantly more likely to report they face a hidden charge than non-disabled passengers, especially drop-off charges

Showing points in the journey at which disabled passengers are significantly more likely to report facing hidden charges than non-disabled passengers

	Disabled	Not disabled
NET: Any hidden charge	37%	29%
When selecting a baggage option during booking	17%	12%
When being dropped off at the airport	10%	3%
During the flight	5%	2%

Disabled passengers are significantly more likely to have reported that they faced a hidden charge on their most recent flight compared to non-disabled passengers (37% vs 29%).

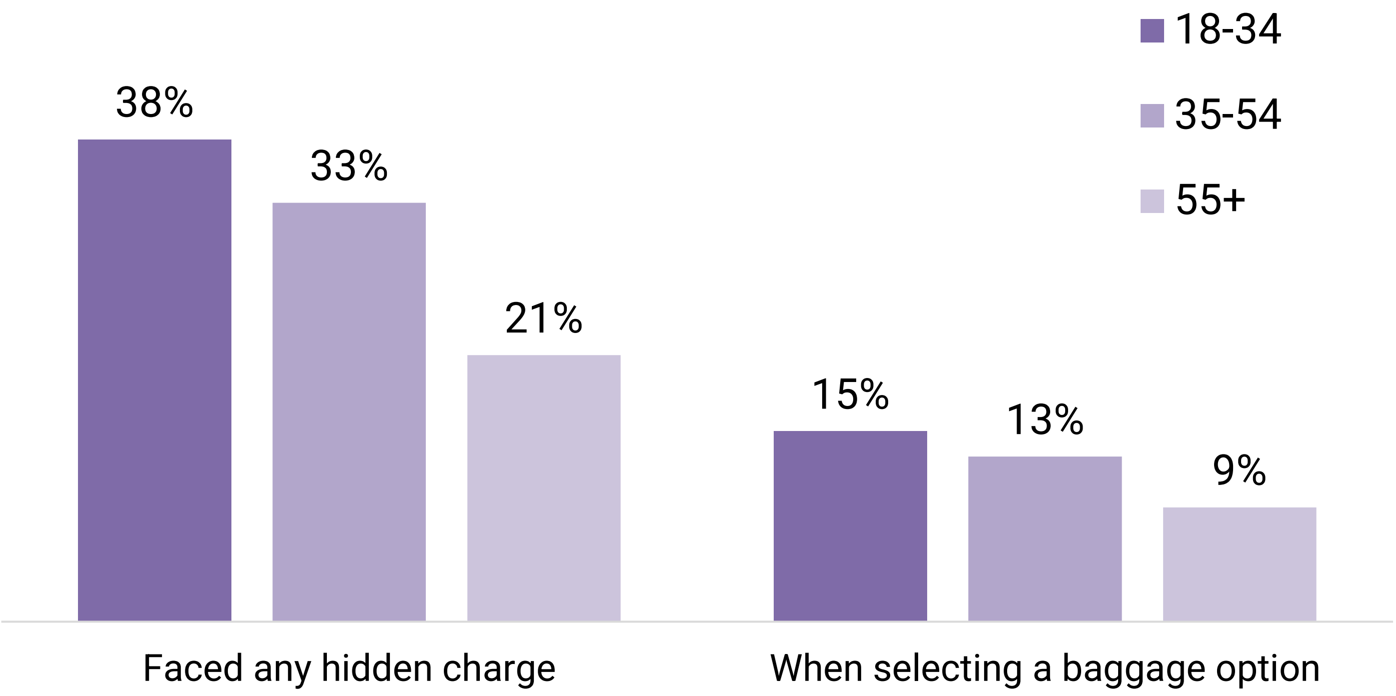
Linking back to cost satisfaction, it is therefore unsurprising that disabled passengers are satisfied with the value for money of their flight in fewer numbers.

The costs most commonly reported by disabled passengers are during the seat booking process (17%) and when selecting baggage options (17%). However, it is in drop-off charges where the gap between disabled and non-disabled passengers is most pronounced – disabled passengers are over three times as likely to report facing this charge (10% vs. 3%).

Q22. Did you face any hidden, unexpected, or additional charges on your most recent trip?
Base: All who have flown in the last 12 months (n=2163), including those with (n=275) and without (n=1874) a disability or health condition.

Younger consumers are significantly more likely to say that they face hidden charges

Showing percentage of different age groups who reported facing hidden charges



Almost two fifths of consumers aged 18-34 report facing hidden charges (38%), a significantly higher proportion than those aged 55+ (21%).

Younger consumers are significantly more likely to report facing hidden charges at several stages of the journey, but the starkest difference by age concerns hidden charges when selecting a baggage option – 15% of 18-34s report facing this charge, compared to just 9% of consumers aged 55 and over.

Q22. Did you face any hidden, unexpected, or additional charges on your most recent trip?
Base: All who have flown in the last 12 months (n=2163), including those aged 18-34 (n=697), 35-54 (n=721), and 55+ (n=745).

Section 2.3:

Travel disruption and complaint handling

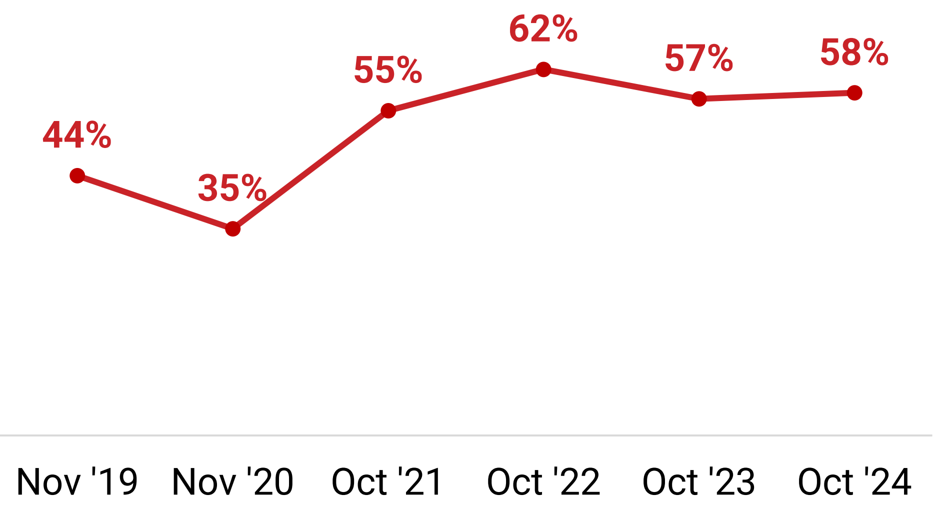
Key takeaways from this section:

- **Travel disruption is faced in similar numbers to last year, with the prevalence of flight delays increasing slightly**
- **Facing disruptions negatively impacts consumer satisfaction, but also appears to erode consumer trust in the industry more widely – including in areas apparently unrelated to travel issues**
- **Consumers are complaining in similar numbers to last year, but satisfaction with how these complaints are handled is significantly higher, with a particular improvement in perceived friendliness, ease of contact and fairness of treatment**

Click the arrows to skip to key takeaways in the previous/next section

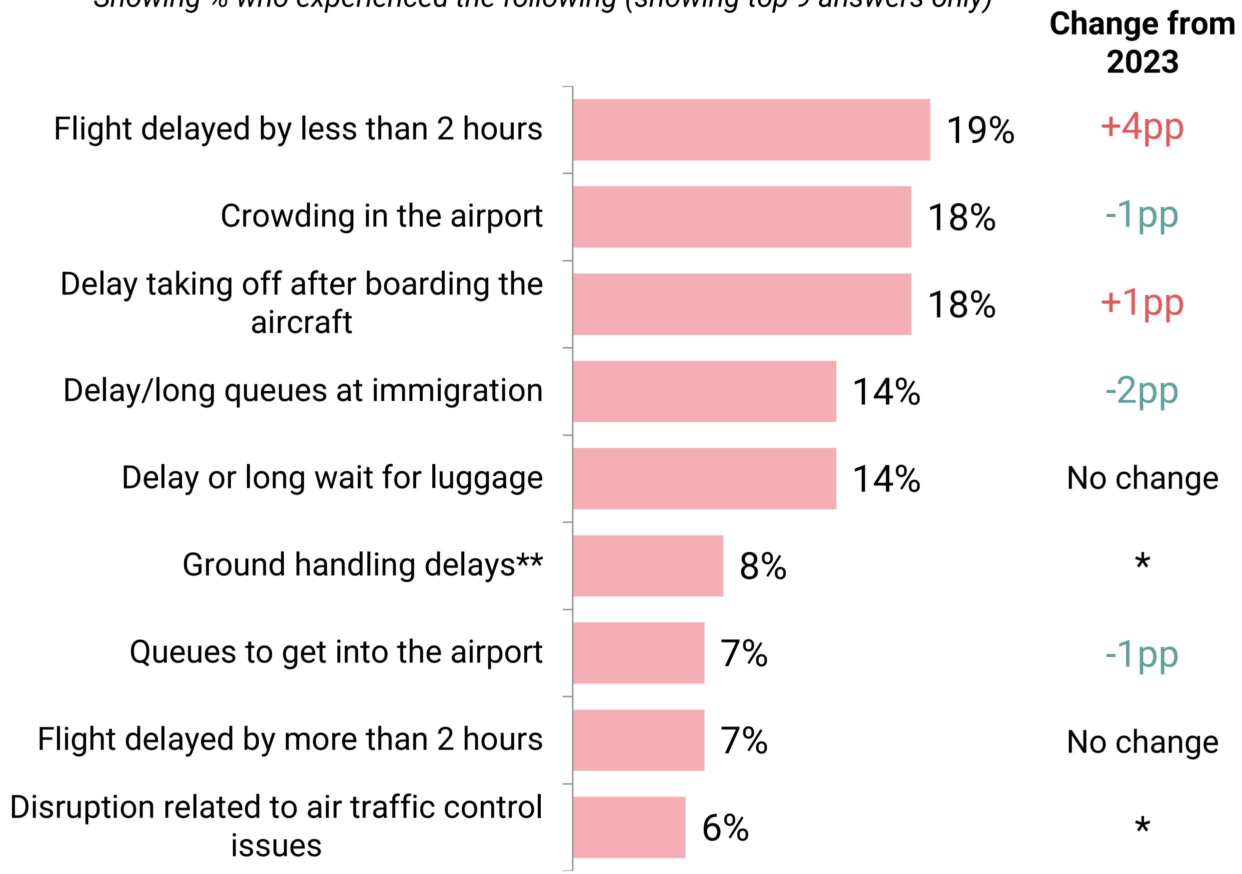
The proportion of consumers facing travel problems remains similar to last year, with the prevalence of flight delays increasing slightly

Proportion of recent flyers facing any travel problem



Most commonly experienced travel problems

Showing % who experienced the following (showing top 9 answers only)



Q27. During your most recent journey, did you experience any of the following issues? *New codes for this year, so no tracked data available. **Please note that 'ground handling delays' was contextualised further for respondents. The full statement reads 'Ground handling delays (i.e., when the aircraft is already in the airport but boarding is delayed due to refuelling, cleaning, or other maintenance)'. Base: All who have flown in the last 12 months (n=2163).

Disruptions negatively impact satisfaction on that journey, but also have a cumulative negative impact when faced on multiple journeys

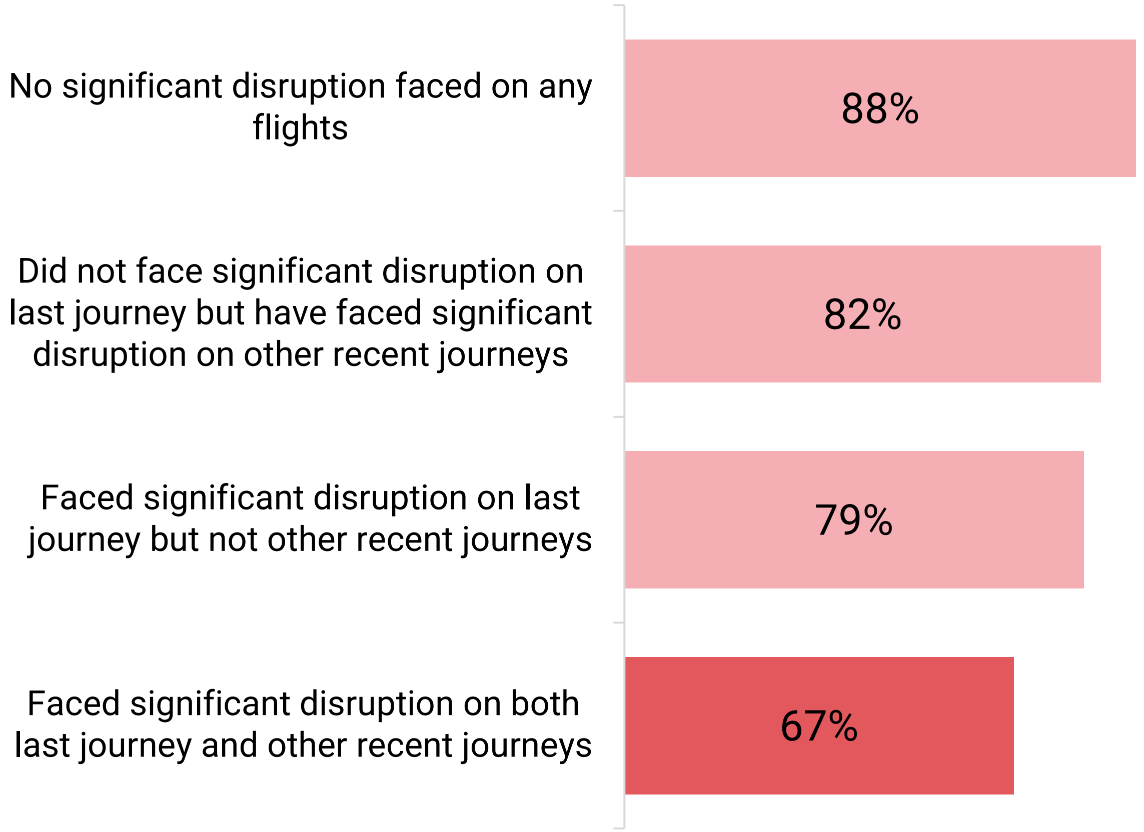
Satisfaction with overall travel experience on most recent journey when there are…

	No travel problems	Some travel problem(s)	Gap
October 2023	88%	73%	15pp
October 2024	93%	78%	**15pp**

As seen in last year's ACS report, the experience of a travel problem on a flight has a negative impact on satisfaction levels. Whilst satisfaction scores have increased, the gap in scores remains.

Additionally, being informed of the disruption cause and being informed of passenger rights continues to increase satisfaction scores. Face to face contact with staff is also impactful when facing a travel problem as those with the opportunity to speak to staff hold higher satisfaction with their journey (85% of these consumers are satisfied, compared to 73% of those who did not speak to staff).

Satisfaction with the experience of travelling by air (in general, not just on most recent flight) over the last 12 months, when…



Q24.14. How satisfied or dissatisfied were you with the overall travel experience? Q5. How satisfied are you with the experience of travelling by the following modes of transport in the UK over the last 12 months? (1-10 scale). Q28. Thinking about your most recent journey by air and also the other journeys by air you have taken in the last few years, which of the following best describes your experience? Base: All who have flown in the last 12 months, excluding DK and NA (n=2163).

Facing disruption also appears to erode consumer trust in the industry, even in areas apparently unrelated to travel issues

Showing percentage of consumers who trust that the industry is genuinely committed to the following areas, split by whether travel issues were faced on the most recent flight

	No travel issues faced	Any travel issue faced	Faced a flight delay
Developing new technology to improve comfort and efficiency at airports	79%	73%	71%
Speeding up journey times through new technology	76%	71%	68%
Finding solutions to minimise disruption and delays	71%	60%	56%
Improving the standard of customer service	69%	60%	54%
Reducing the environmental impact of flying	62%	54%	50%
Reducing the cost of flying	42%	37%	35%

Consumers who face travel issues are significantly less likely to trust the industry's commitment when it comes to all of the areas tested. One would expect this to be the case when it comes to finding solutions to minimise disruption and delays, and possibly improving the standard of customer service – and these two areas are where the gap in trust is most pronounced. But it is striking that this statistically significant difference exists for *all* areas, including those that have no obvious relation to disruption such reducing costs and the environmental impact of flying. This may indicate that facing travel disruption erodes trust in the industry more generally, in addition to impacting satisfaction.

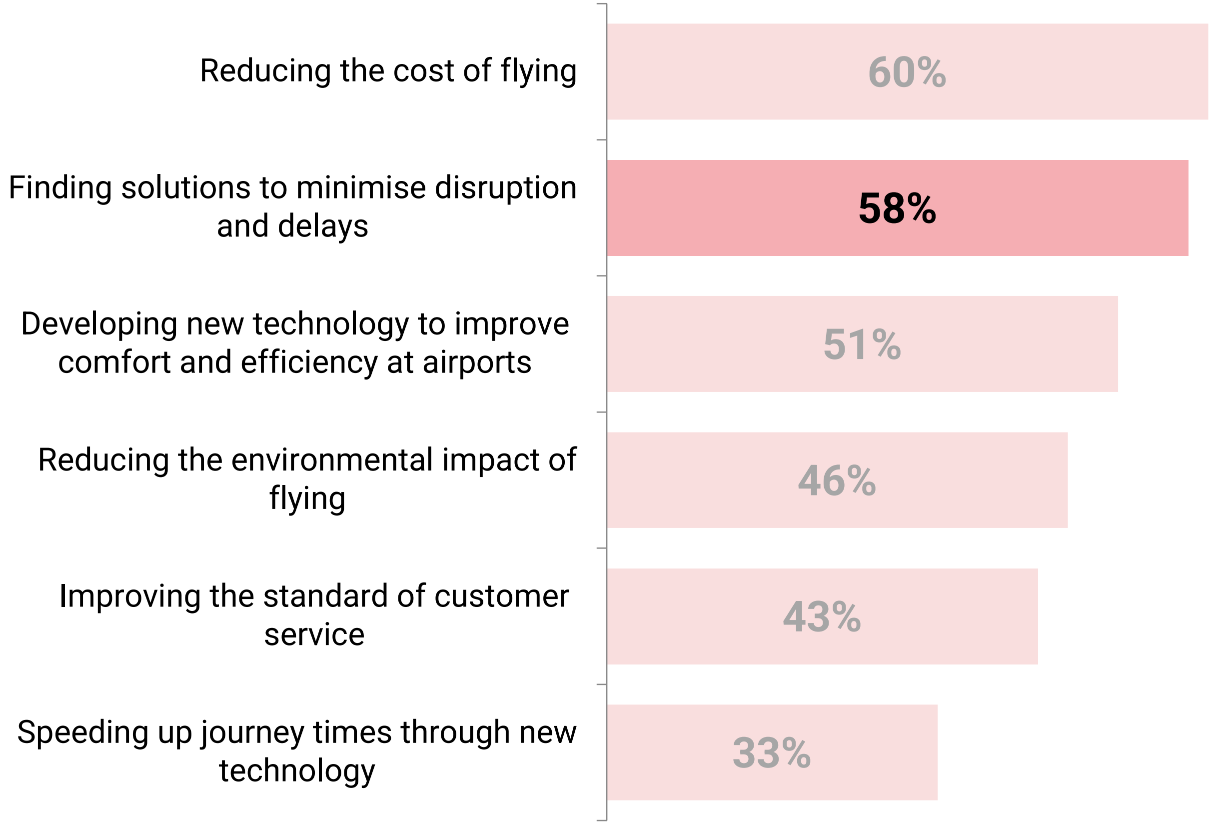
This difference is even more pronounced when considering consumers who faced a flight delay specifically – this appears to influence trust even more so than travel issues in general.

Q8. Thinking about those same areas, to what extent do you trust that the aviation industry is genuinely committed to…?
Base: All respondents (n=3,500).

With travel problems persisting, finding solutions to these issues is a widespread priority, particularly for those who have experienced a delay on their most recent flight

Top priority areas for the aviation industry

Showing % who say the following are in their top three priority areas



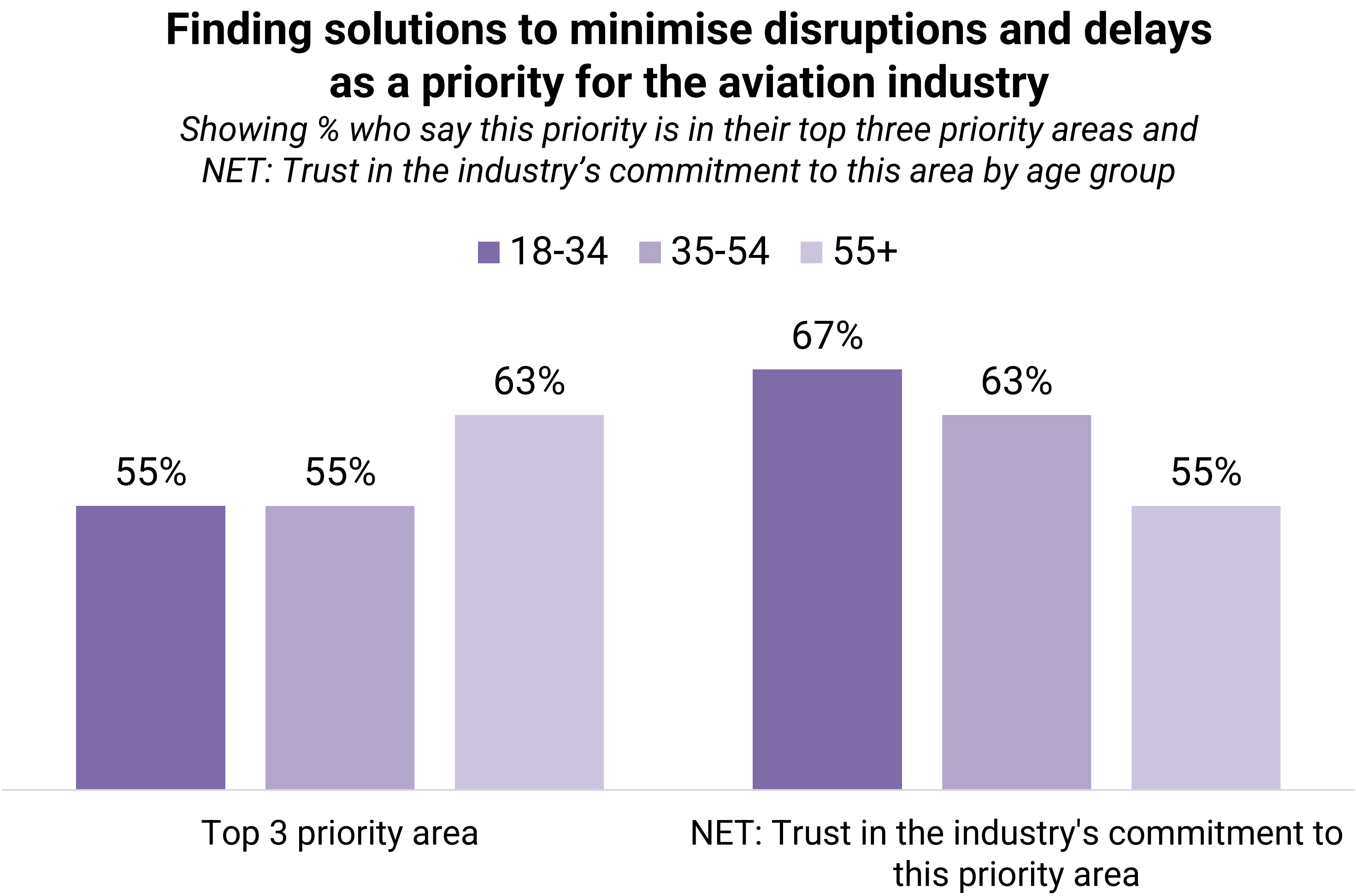
Prioritising minimising disruption is particularly driven by those who have experienced a delay on their most recent flight (69% compared to 59% amongst those who experienced no travel problem).

However, while in the top three priorities for two in three consumers, finding solutions to disruption is the top priority overall for a relatively small group of people (15%).

Trust in the aviation industry's commitment to minimising disruptions is also more strongly felt overall in comparison to reducing costs. Two in three (61%) consumers trust the industry to follow through with this priority area. However, this trust is impacted when having experienced a delay (56%) or any travel problem (60%) compared to no travel problems (71%).

Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas? Base: All respondents (n=3500).

Older consumers are significantly more likely to want to prioritise finding solutions to minimise disruptions but are less likely to trust the industry's commitment to do so



For those aged 55+, minimising the prevalence of disruptions is of particular importance. Those aged 55+ are **twice as likely to identify disruption as a barrier to flying**. This explains why 63% of aged 55+ have this in their top three priorities for the aviation industry compared to 55% of those aged 18-54.

Whilst it is a priority for older consumers, they are **more likely to be cynical about the industry's commitment** to reducing disruption (55% of those aged 55+ trust the industry's commitment, compared to 67% of 18-34-year-olds).

Q22. Did you face any hidden, unexpected, or additional charges on your most recent trip?
Base: All who have flown in the last 12 months (n=2163), including those aged 18-34 (n=697), 35-54 (n=721), and 55+ (n=745).

Information sharing around travel disruptions has improved. However, older consumers continue to report worse outcomes when disruption is faced

Informed of the cause

Over half (57%) report they were informed of the cause of their travel disruption, up 9pp since 2023 (48%). Whilst older consumers are still less likely to believe they were informed than 18-34-year-olds, this is not a significant difference, and improvements have been made compared to 2023 (55+ informed 2024: 54% vs 2023: 38%).

Informed of rights

Just a quarter (26%) of consumers say that they were informed of their rights when experiencing a travel problem (2023: 22%). Most notably, this impacts older consumers more with just 1 in 10 (11%) reporting being informed of their rights. This points to potential issues with how information around rights is shared.

Opportunity to speak to staff

Only a third of passengers say that they had the opportunity to speak to someone in person when experiencing a travel issue (36%). This again is much lower amongst those aged 55+ (24%) compared to 18-34-year-olds (46%). Location of helpdesks and visibility of customer services could play a part in how accessible travel support is.

Choice of refund or alternative flight

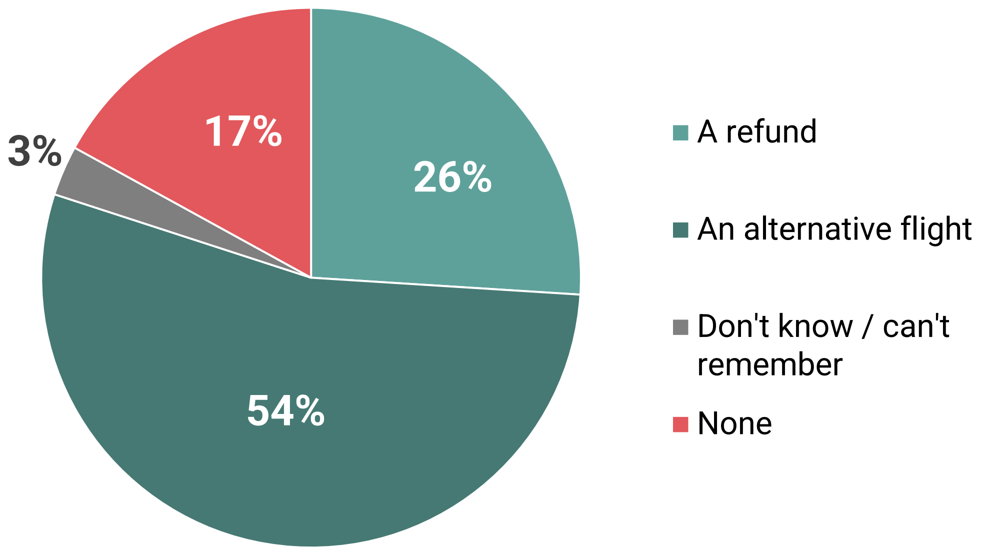
When experiencing a flight cancellation, half of consumers (54%) report being offered an alternative flight, with just a quarter (26%) saying they were offered a refund. Whilst an alternative flight is reported to be commonly offered across age groups, those aged 55+ (12%) are much less likely to say that they were offered a refund (vs 31% 18-34)*

Q29. Were you informed of the cause of the issue(s) you experienced on your most recent journey? Q30. And were you informed of your rights by the airport or airline? Q31. Did you have the opportunity to speak to a member of the airline or airport staff in person? Base: All who experienced a travel problem (n=1242). Q32. 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 experience a flight cancellation (n=70) *Please treat with caution: small base sizes for age group comparison

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

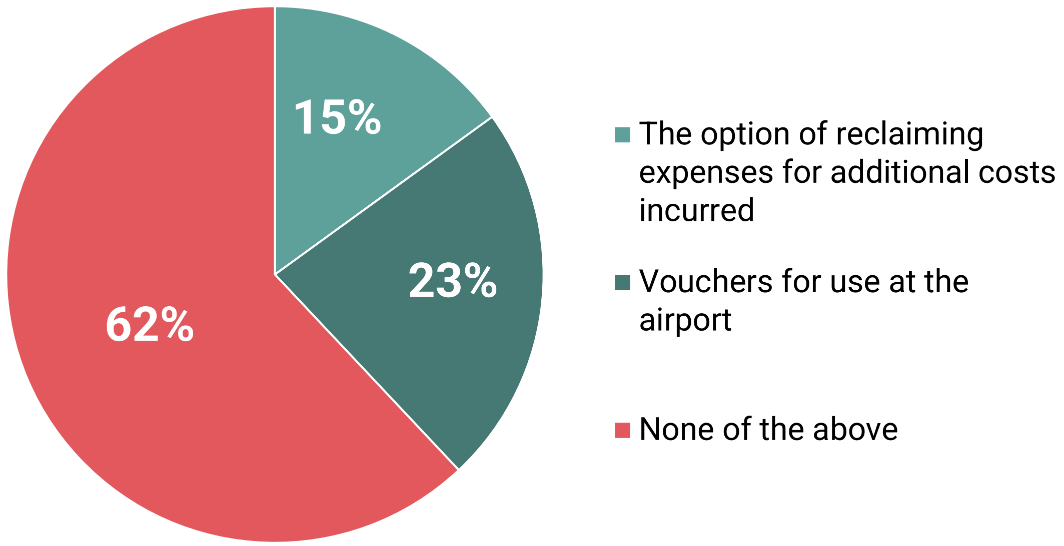
Refund or alternative flight offered following cancellations and postponements

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

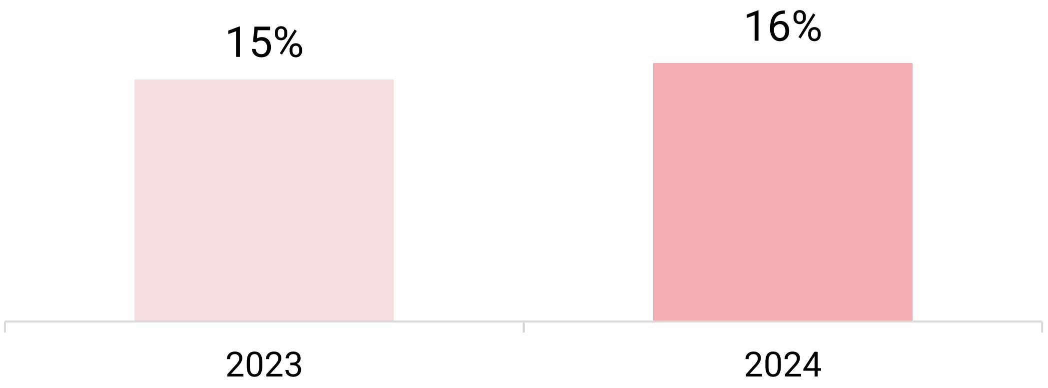


Whilst an alternative flight is commonly reported to be offered across age groups, **older consumers (55+) are much less likely to report that they were offered a refund (12%) compared to those 18-34 (31%)*** This age group are also less likely to report that they were informed of their rights, highlighting the need for more accessible information on what passengers are entitled to when experiencing travel issues.

Q32. 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=70) *Please treat with caution: small base sizes for age group comparison. Q33. 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 two hours or more (n=150)

The prevalence of complaints is similar to last year, but satisfaction with how they are handled is considerably higher

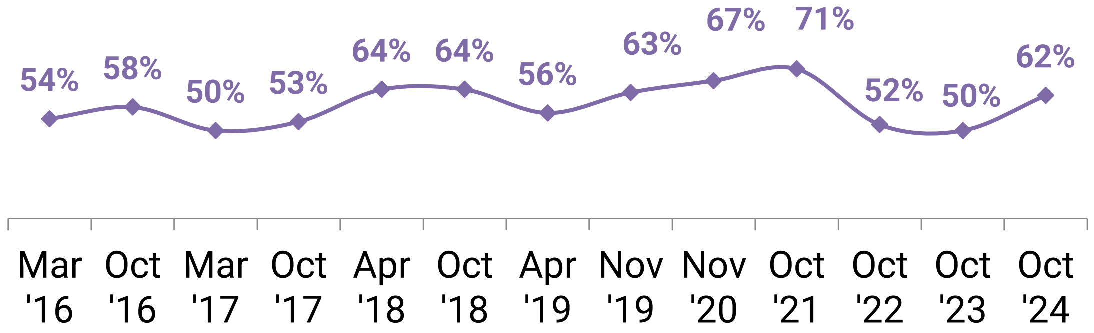
Percentage of consumers who made a complaint following a disruption
(based on only those who faced disruption on their most recent flight)



The proportion of consumers making a complaint after facing a travel issue on their most recent flight is similar to 2023 at 16%.

However, the proportion of consumers with disabilities who have made a complaint following a travel issue has increased. A fifth (22%) of disabled consumers who faced a travel problem on their most recent flight made a complaint, up from 17% in 2023.

Showing percentage of consumers satisfied with complaints handling on their most recent trip



Although complaints are still being submitted in similar numbers, satisfaction with how they are handled has notably improved since 2023, with three in five consumers saying that they were satisfied with this process.

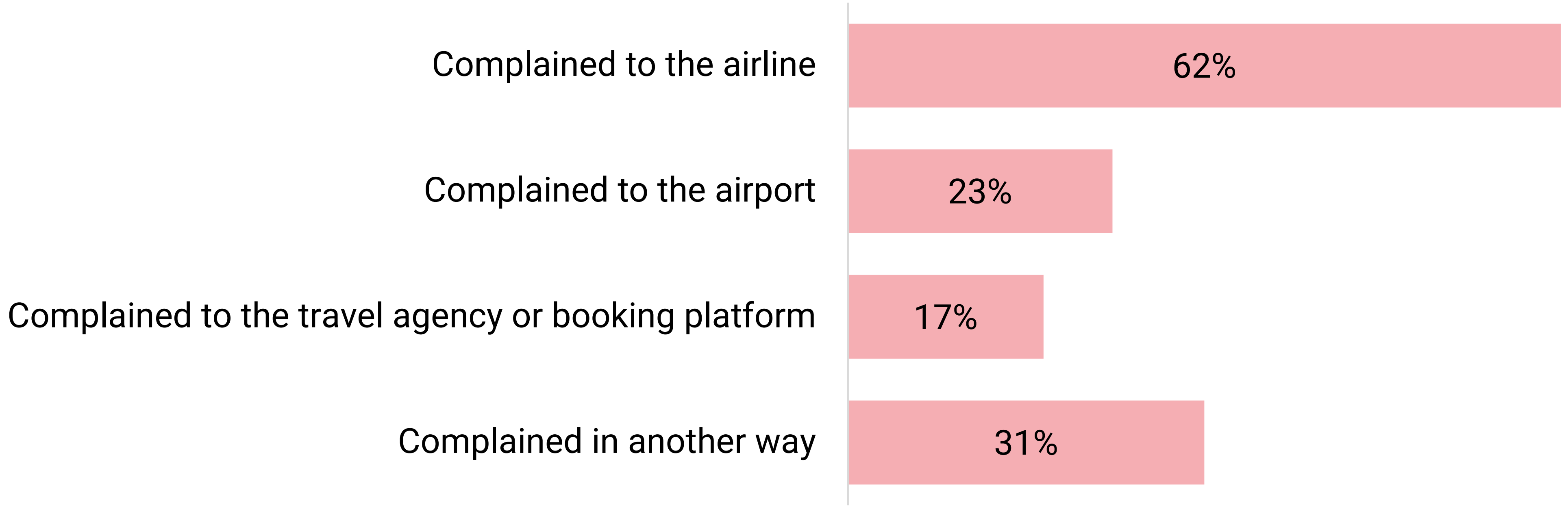
Older consumers remain significantly more likely to say they are dissatisfied with complaints handling, with a quarter (27%) of consumers aged 55 and over saying as much, compared to 12% of 18-34s and 14% of 35-54s.

Q34. Which, if any, of the following did you do during or after experiencing your flight issue? Base: All who faced a travel problem (n=1242).
Q23. How satisfied or dissatisfied were you with the handling of complaints? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=893).

Of those that do complain after recent flight issues, three fifths do so to the airline

Complaints made after recent flight issue(s)

Showing % who took the following actions after their travel disruption



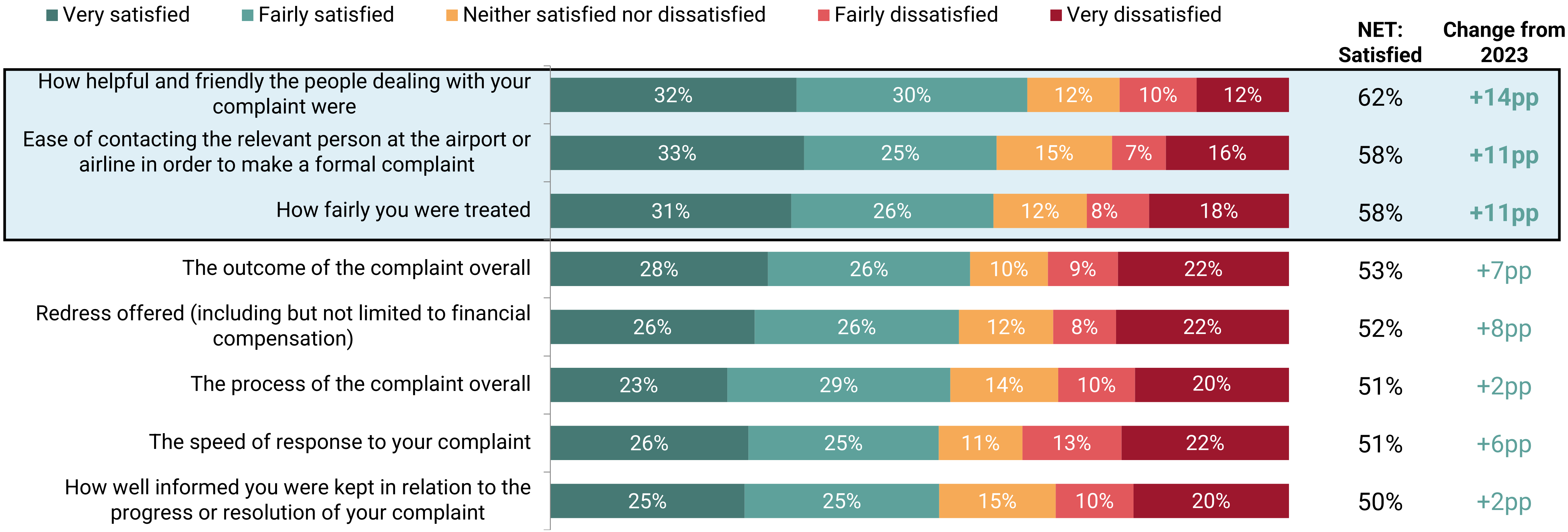
Only a small proportion of consumers direct their dissatisfaction with how their travel issue was handled by making a complaint. But of those that do complain, **most complain to the airline, therefore suggesting they see their travel issue as the responsibility of the airline to handle.**

Q35. Who did you make a complaint to? Note: respondents were able to choose multiple options here, so percentages add up to over 100%.
Base: All who complained about a travel problem (n=194)

Satisfaction with all aspects of complaints handling has risen, particularly helpfulness and friendliness, ease of contact and perceived fairness of treatment

Satisfaction with specific aspects of complaints handling

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



Q36. 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 formally complained about a travel problem (n=185).

Savanta:

Section 2.4:

Aviation and the environment

Key takeaways from this section:

- **Attitudes are similar to those seen last year, with widespread concern about the environment, but relatively few consumers are willing to fly less or pay more to offset the environmental impact of flying**
- **Most consumers do not see it as their personal responsibility to pay for measures to support the environment, instead tending to see this as the airline or Government's responsibility**
- **Younger consumers clearly care about the environmental impact of aviation but results suggest that the affordability of flying may be of greater importance to them**

Click the arrow to skip to key takeaways in the previous section

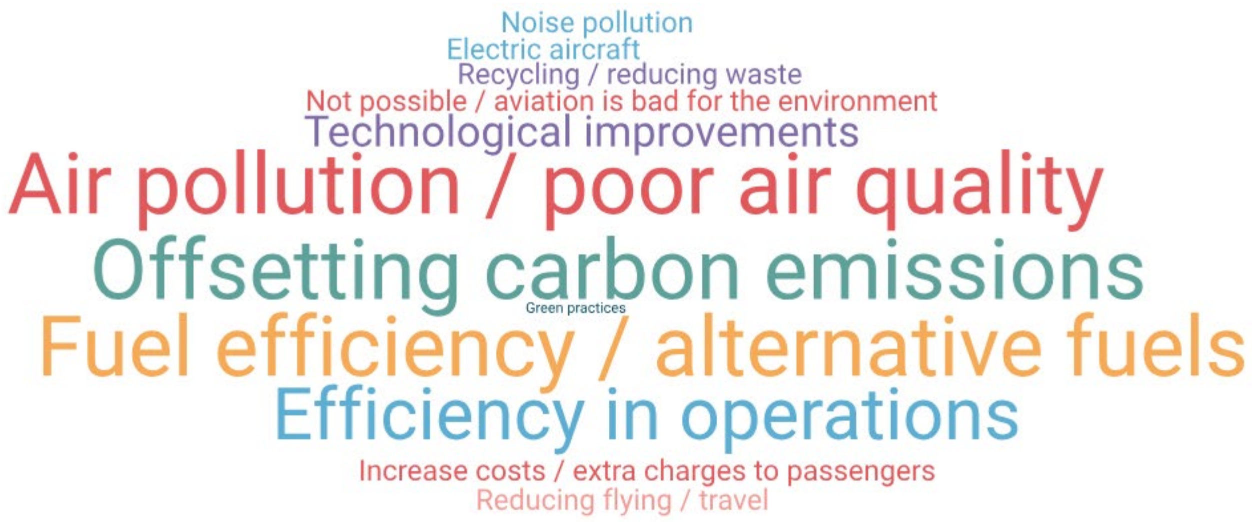
Consumers are divided on what environmental sustainability means in the context of aviation, with some linking it to practical measures, and others regarding sustainability and aviation as being fundamentally at odds

When it comes to environmental sustainability in the context of aviation, consumers are split between those who think it is something that can be achieved through changes in the industry, and those who regard the industry as fundamentally at odds with sustainability.

Many discuss sustainability in quite general terms, citing the need to produce fewer carbon emissions and reduce the carbon footprint. Some consumers are more specific, saying that – in the context of aviation – they understand sustainability as meaning measures such as developing more sustainable fuels or having airports themselves take environmentally-friendly measures.

A small proportion of consumers responded to the question by saying that aviation, fundamentally, is at odds with sustainability. These consumers say that a reduction in the number of flights, or the discontinuation of flying altogether, is the only true way to promote sustainability in aviation.

What consumers understand by 'environmental sustainability' in the context of aviation

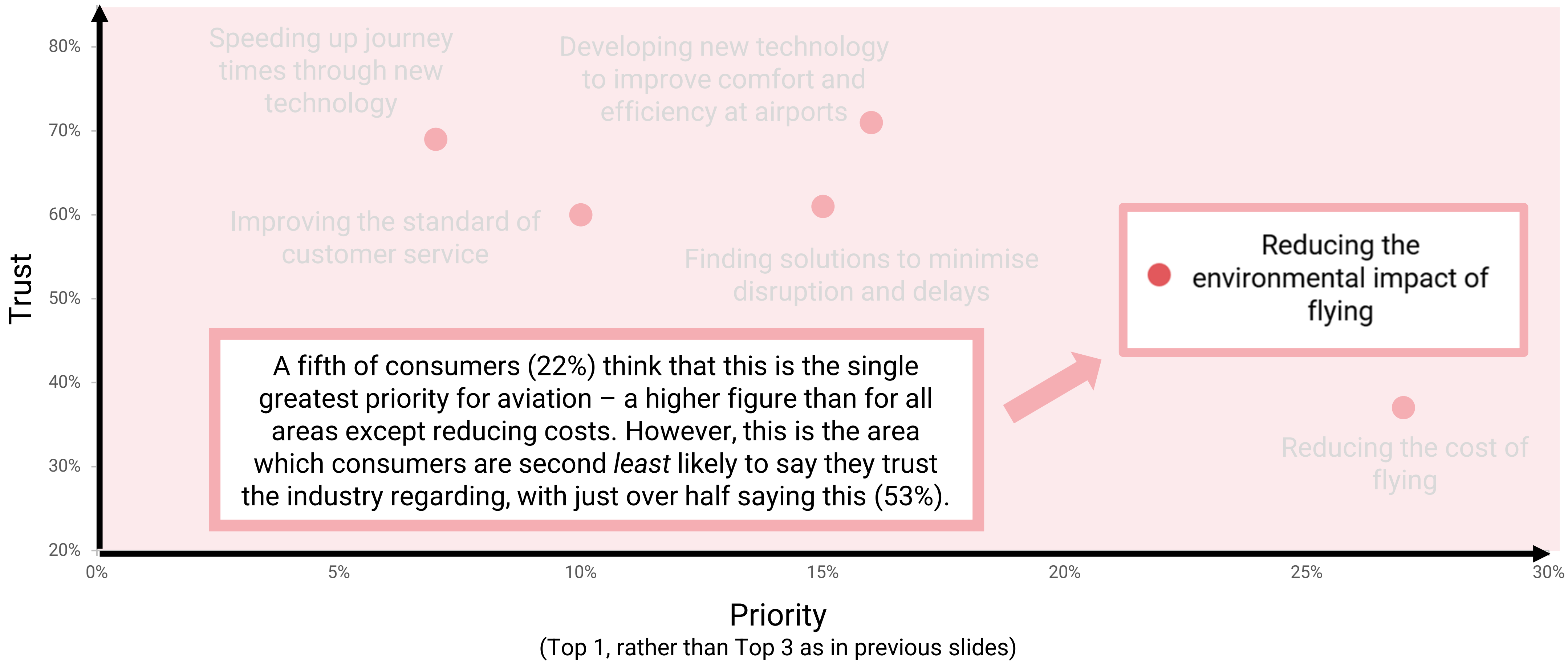


This wordcloud shows the most prevalent themes in consumers' responses, with words sized in line with number of mentions.

Q37. In a sentence or two, summarise what you understand by environmental sustainability, in the context of aviation.
Base: All respondents (n=3500).

After cost reduction, consumers are most likely to identify the environment as the single greatest priority for aviation – but trust in the industry's commitment here is *lower* than for all areas except reducing costs

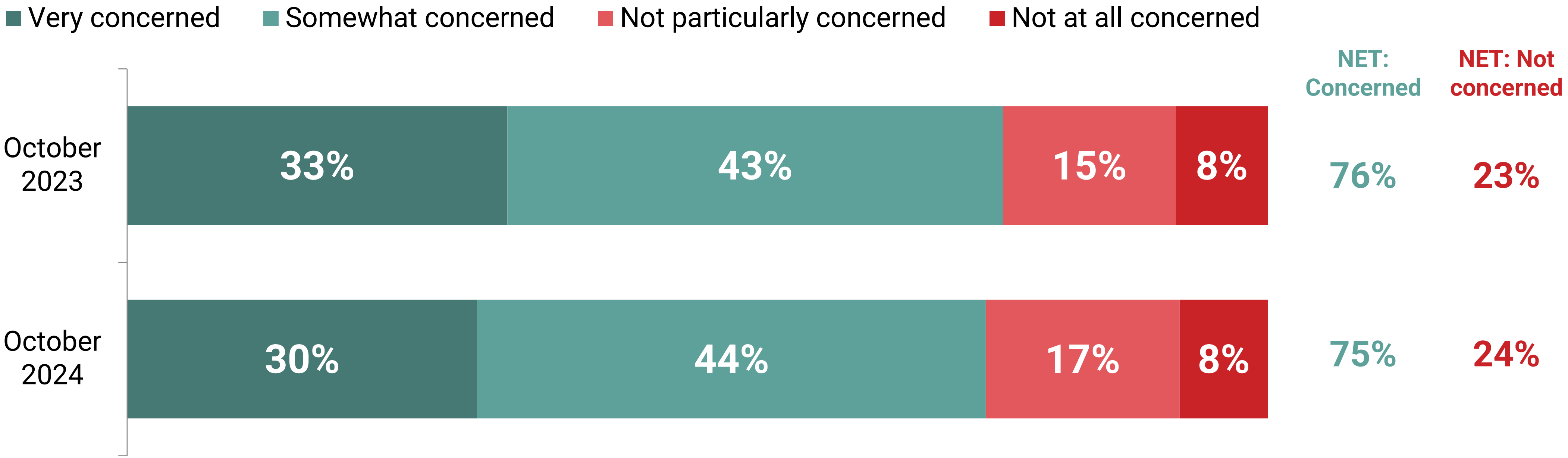
Prioritisation of areas vs. trust in the aviation industry's commitment to them being genuine



Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas? Q8. Thinking about those same areas, to what extent do you trust that the aviation industry is genuinely committed to…? Base: All respondents (n=3500).

Three quarters of consumers say that they are concerned about the environment and climate change at present, similarly to last year

Showing level of concern with the environment and climate at present

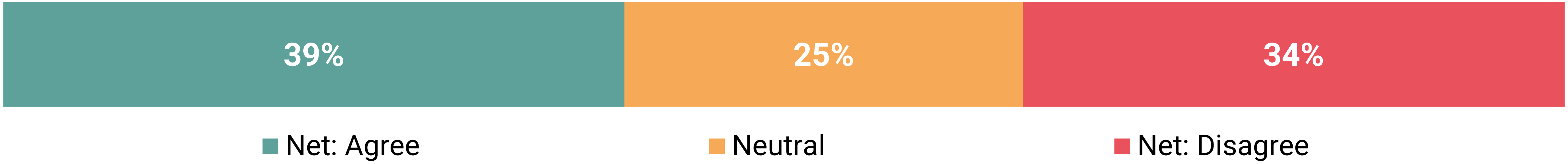


As seen last year, attitudes here do not vary across age groups to any great extent – all are concerned about the environment in similar numbers. Given that three in ten consumers described themselves as 'very concerned' with the environment, it is perhaps unsurprising that so many consumers identify reducing the environmental impact of flying as their number-one priority for the industry.

Q38. To what extent, are you concerned about the environment and climate change at present?
Base: All respondents (n=3500).

Much like last year, relatively few consumers think about the environment when deciding whether to fly – and very few have avoided flying for environmental reasons

When deciding whether to travel by air, I think about the environmental impact
Showing percentage who say the following



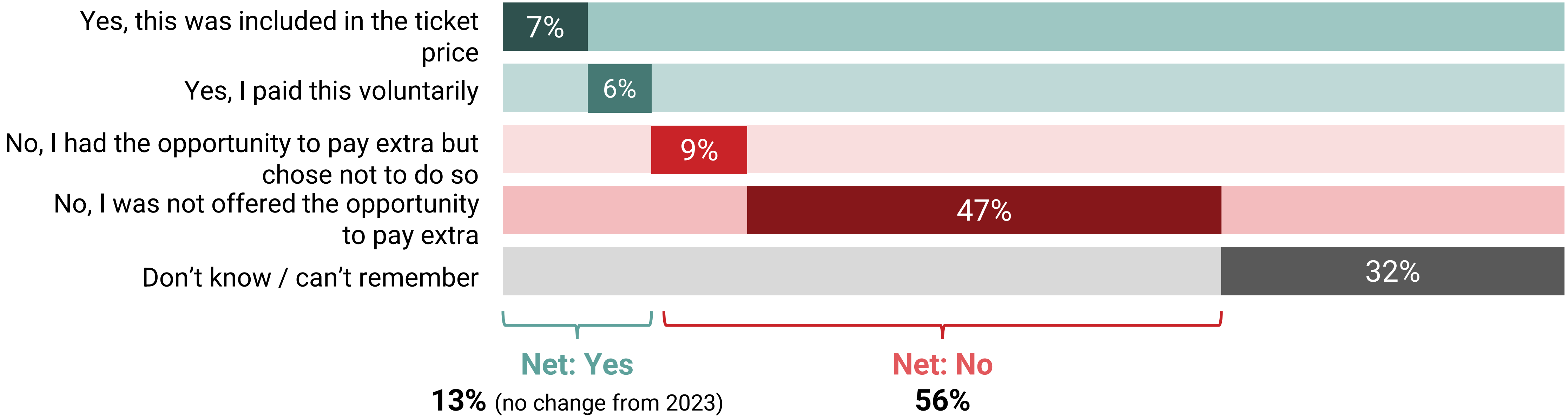
Consumers are slightly more likely to claim they consider their environmental impact when deciding to fly than in 2023 (36%), though it remains the case than fewer than two fifths of consumers consider their environment impact. Furthermore, amongst those who have not flown recently (38% of consumers), environmental concerns are only cited by 7% as their reason for not flying.

Whilst environmental concern does not vary by age, consumers aged 18-34 (46%) are more likely to consider the impact of their flight compared to those aged 55+ (34%); younger consumers are more likely to claim that they are influenced by environmental concern when deciding whether to fly or not.

Q3. Why have you not flown within the last 12 months/? Base: All who have not flown in the last 12 months (n=1321). Q9. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3500).

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

Showing the percentage of recent flyers who paid to reduce or offset the environmental impact of their most recent flight



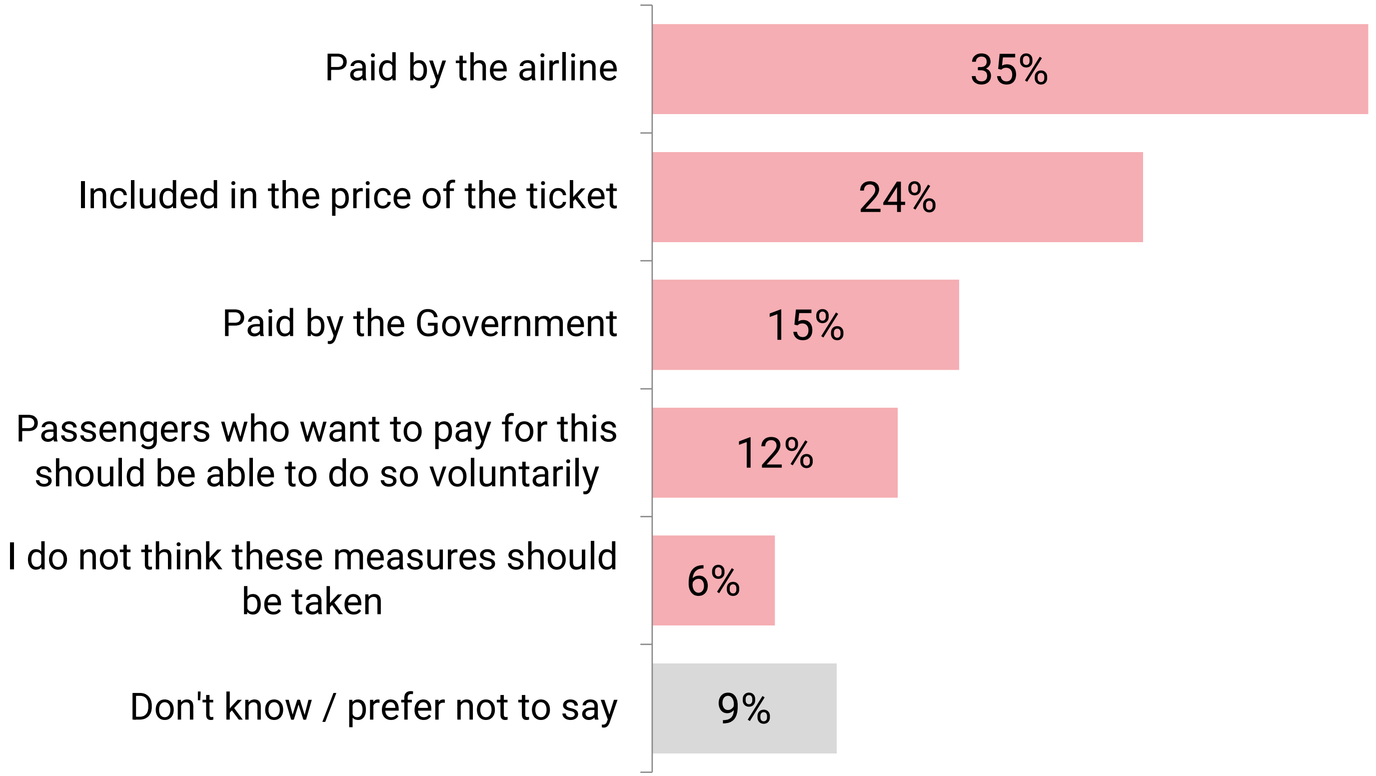
Just 13% of consumers who have flown previously say that they have paid to reduce or offset the environmental impact of their most recent flight, the same proportion as in 2023. It also continues to be the case that younger recent flyers (aged 18-34) are significantly more likely to say they paid to reduce or offset the environmental impact of their last flight (21%). Older age groups are therefore more likely to say they haven't done this. But it is notable that older and digitally less confident consumers are *also* significantly more likely to say that they are unsure whether they did this or not, which may suggest barriers to awareness of these options during the booking process.

Q40. On your most recent flight, did you pay for reducing or offsetting the environmental impact of your flight?
Base: All who have flown previously (n=3373).

Passengers do not 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



Over one third of consumers think airlines should cover the cost of measures to reduce the environmental impact of flying (35%).

Consumers aged 55 and over are significantly more likely to think that environmental cost should be included in the ticket price (34%) compared to those aged 18-34 (14%) and those aged 35-54 (19%).

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+ (28% and 6% respectively).

Q39. 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=3500).

These findings indicate that younger consumers do care about the environmental impact of aviation, but the affordability of flying may be of greater importance

Younger consumers are often assumed to be more environmentally conscious than older generations. Millennials and Gen Z, in particular, grew up in an era of heightened awareness about climate change and are often seen as more likely to support sustainable brands, buy eco-friendly products, and care about ethical consumption. However, this year's ACS results indicate that concern about the environment is fairly even across age groups.

That said, younger consumers are more likely to claim that environmental concerns influence their behaviour. They are significantly more likely to say they consider the environmental impact of flying when deciding whether to book a flight and to report having paid to offset the impact of their flights. Despite this, they are also significantly more likely than older consumers to have flown in the past 12 months.

On the other hand, consumers aged 55 and over are significantly more likely to say that reducing the environmental impact of flying should be the aviation industry's top priority, and significantly more likely to think that the cost of reducing the impact of flying should be included in ticket prices.

This disparity may reflect the fact that older consumers, who tend to have higher incomes, are less concerned about the prospect of higher personal costs. While reducing the environmental impact of flying is clearly important to younger consumers, affordability appears to be a more pressing concern when they are forced to choose between the two.

Methodology

The Aviation Consumer Tracker is a quantitative survey of a nationally representative sample of 3,500 UK adults (18+). The full sample profile is detailed on the next page.

Fieldwork is predominantly conducted online, but an additional 500 consumers complete the survey via telephone interview (CATI), to ensure that consumers with limited digital access or capability are able to participate.

3,500 completes	3,000 online completes 500 phone completes	Fieldwork dates: 23rd September to 14th October 2024

The research design, analysis and reporting is conducted by Savanta, an independent market research organisation.

As a member of the Market Research Society, Savanta conducts this research programme in strict accordance with the requirements of the international quality standard for market research.

Previous instalments of this research

From 2016 to 2019, the ACS was conducted twice per year. From the ninth instalment or 'wave' of the survey onwards (2020), the survey has been conducted once per year.

Most questions asked in the survey are repeated every wave, or every other wave. This provides a picture of how and why consumers attitudes are changing over time. The remaining, variable component of the survey enables the CAA to investigate emerging trends and explore specific questions in detail. This year, a particular focus was understanding consumers' priorities and trust in the industry in various areas.

Previous ACS reports can be accessed here
(Clicking this button will take you to the CAA website)

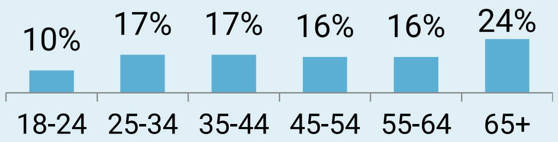
Weighted sample profile

The core sample is recruited according to figures from the Office for National Statistics, in order to ensure that it is demographically representative of the UK by gender, age, region and working status. The entire sample (including phone boost) is then weighted by the same factors to correct any minor variations from the ONS figures. The weighted sample profile is as follows:

Gender

Male	48.4%
Female	51.6%

Age



Working status

Working full time	45.4%
Working part time	15.3%
Not working (including, e.g., students and the retired)	39.3%

Region

East Midlands	7.3%	South West	8.7%
East of England	9.4%	West Midlands	8.8%
London	13.0%	Yorkshire and the Humber	8.2%
North East	4.0%	Northern Ireland	2.7%
North West	11.1%	Scotland	8.3%
South East	13.8%	Wales	4.7%

Contact details

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