

CAA consumer research for the UK aviation sector - report of the qualitative stage

CAP 1304



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Published by the Civil Aviation Authority, 2015

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CAA Foreword

Consumer Research

As part of our commitment to taking an evidence-based approach to regulation the CAA commissioned a substantial piece of qualitative and quantitative research to:

- provide insights on the behaviours, needs and concerns of consumers, including vulnerable and disadvantaged groups, and infrequent/non-flyers;
- identify areas where provision of new/additional information could facilitate more informed decisions by consumers; and
- explore the under-researched attitudes towards air travel safety and security.

The research findings were based on a mixed online and telephone survey of 3,000 consumers across the UK between mid December 2014 and mid January 2015.

There were a number of positive findings from the study:

- high level of overall satisfaction
- in most cases, aviation-related issues are not preventing people from travelling by air – main barriers are circumstantial factors (e.g. budget constraints, flying not an option) and preference for other modes;
- consumers appear to be reasonably well-informed and equipped to make air travel choices;
- high levels of satisfaction reported by passengers with restricted mobility and disabilities who have requested assistance from airports/airlines; and that
- confidence in aviation safety and security standards is generally high.

However, the research findings also highlighted some issues where further research would be valuable in helping guide the CAA's response. These included:

- use of price comparison websites was relatively low compared to other markets and some of those who shopped around found purchase/comparison process confusing;
- consumers are not always provided with clear information that maybe important to them before, during and after their journey;
- for consumers with restricted mobility or a disability, access issues were cited as a reason for not flying by a substantial proportion (~40%), and of those who had flown in the last 12 months, around one-third were uncertain that their needs would be met, with only a similar proportion actually requesting assistance for their journey;

- a significant minority (around a quarter) of consumers were dissatisfied with the information and assistance provided when problems occur before or during their journey; and that
- consumers have difficulties seeking redress when things go wrong, reporting high levels of dissatisfaction (40%) with complaints handling.

Consumer research has a key role in providing insights that, in conjunction with other indicators, allow the CAA to identify the risks that consumers may face due to information and/or market imperfection, and improve our understanding of future trends and developments which may impact consumer outcomes.

Insights from this report of the qualitative stage are fed into the final research findings:
[CAP1303 Consumer research for the UK aviation sector – final report.](#)



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CAA consumer research

Report of the qualitative stage

Prepared for:

CAA



December 2014

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1. Executive Summary

This report relates to the qualitative phase of the consumer research, which was conducted in November 2014. Quantitative research will be conducted in December 2014 – January 2015, and a full report integrating findings from both phases of the research will be produced in early 2015.

A particular focus of the qualitative research was on exploring in detail consumers' attitudes to aviation safety and security, and if and how this affects choices and flying experiences. The research was also designed to provide evidence on two groups of interest to the Civil Aviation Authority (CAA) but of whom less is known – these include passengers with restricted mobility (PRM) and infrequent flyers. The qualitative sample therefore included recent business and leisure flyers, as well as those who have not flown within the last year, and PRM respondents.

The main findings from the qualitative phase of research are as follows:

1.1 Attitudes to safety and security

- Safety and security in air travel were not generally front of mind considerations for consumers, whether in decision making, at point of booking or during their air travel experience. However, there was a strong latent awareness of safety and security issues in relation to air travel, due to the prominence of safety and security processes when people fly. This suggests that safety and security are fundamentally important issues, but things that people put to the back of their minds when flying.
- Once prompted, people expressed a variety of feelings about safety and security. Some were inherently more nervous and fearful flyers while others were much more sanguine. There appears to be some inverse correlation between level of concern and frequency of travel.
- However, across the board there was a perception that air travel, particularly from the UK, is as safe and secure as it can be, and confidence that 'someone' is setting standards and monitoring practices to ensure this is the case.
- Safety and security were felt to go hand in hand as terms, with keeping passengers safe being the fundamental intention of all measures. The public definition extended beyond the CAA's remit to include passenger health, health and safety issues on-board aircraft, as well as immigration and customs risks to the UK.
- A key finding with a bearing on future information provision is that people can be resistant to having safety and security brought to the front of their minds. This can make them feel very uncomfortable and could have the unintended consequence of making them feel less safe and possibly of undermining confidence in the aviation sector in general. It was found to be particularly challenging and emotionally difficult to engage with issues of risk and uncertainty in relation to safety and security, which could be

brought to the forefront of their minds by information such as star ratings.

- Awareness of the CAA was low and there was little knowledge that it is the body responsible for setting and monitoring safety and security standards (even though the CAA was introduced through the lens of discussions about safety and security). Nonetheless, once the CAA's role safety and security role was introduced there was a broadly positive and supportive reaction. However, people did not want to know more about its work, believing it would not help them to make better decisions about travel and that some things are better done 'behind the scenes'.

1.2 PRM needs and experiences

- The CAA's definition of PRM includes a wide range of people and the term can feel misleading because many of those who would benefit from assistance do not have any mobility restriction per se. Many would not self-define as a PRM and several people who would qualify for assistance had not accessed it. Some were not even aware of what was available to them.
- PRM restrictions can affect more than access and/or use of airports and flying, but also often have a major bearing on choice of destinations and accommodation. In addition, even with assistance from airports and airlines, some PRMs would not be able to travel unaccompanied.
- The strongest association with assistance was wheelchair provision at the airport and help with embarking and disembarking. This tended to be requested in advance, at the point of booking, and those receive this support were generally very positive about the experience.
- However, there were reports of some variations in the nature of assistance provided between different airports. Having a choice of mobility assistance, where provided, was appreciated. Conversely, having to wait long periods could be an issue in some cases. There also appeared to be gaps in the arrangements at in some airports. For example, in some cases people mentioned not receiving assistance at the arrival airport with their baggage or to their onward transport.
- PRM's views on safety and security were in many ways consistent with those of other flyers. However, they have some specific needs in relation to security procedures which were not always met. In addition, their views on safety on-board diverged from the general public as they can face more risks on an aircraft due to their disability or health condition.
- There were some clear information requests from PRM consumers. Current safety briefings make no reference to PRM and how they will be assisted in the event of an emergency. Some also called for information on what assistance airlines and airports are obliged to provide. Those with non-physical conditions and their carers would be interested in knowing what help is available to them. Even those with no mobility-related

needs would appreciate being able to notify the airport and airline of their condition so that staff are aware and can respond appropriately and sensitively as required.

1.3 Understanding Non-recent and infrequent flyers

- There are issues with the CAA's definitions of 'infrequent' flyers – although all were non-recent (have not flown in the last 12 months), some had been frequent flyers in the past.
- Even for genuinely infrequent flyers, the experience of flying was still well recalled, and views about the experience were similar in the most part to those expressed by recent flyers.
- The reasons people have not flown recently were mainly circumstantial including health issues, economic circumstances, family changes, no need to travel abroad etc. There were also some who perceived it to a 'hassle' to travel by air and/or preferred other forms of transport.
- On the other hand, there was little evidence of barriers to travelling, whether this be safety or security concerns, access issues, concerns about the environmental impacts of flying, previous bad experiences or anything else. However, this will need to be confirmed in the quantitative survey.

2. Introduction

2.1 Background

The CAA is the UK's independent aviation regulator and, across all of its remit, the CAA has a duty to make consumer interests the focus of its work. As such, it is important that the CAA:

- Develops an understanding of the behaviours, needs and concerns of consumers, including vulnerable and disadvantaged groups, and infrequent /non-flyers;
- Explores how consumers and the public make choices so that the provision of relevant information could facilitate more informed choices by consumers in the air travel market;
- Understands better how it can empower, where feasible, aviation consumers to understand and manage the risks they face when making choices based on relevant information that is available to them; and
- Focuses its activities on the areas that present the greatest risks to consumers and the outcomes they value.

While relatively recent data are available on consumers' air travel behaviour and experiences, rapid changes in the market environment and use of technology mean that previous research can become quickly outdated. In addition, the CAA has recently been given new responsibilities for the regulation of aviation security and it needs to develop a detailed understanding of consumers' attitudes to safety and security. Finally, there is a gap in the evidence base on the views and concerns of passengers with PRM and infrequent flyers that the CAA is looking to address.

2.2 Aims and objectives of this research

This research has been commissioned to assist the CAA in the development of its new strategic plan by ensuring that current consumer behaviours, needs and attitudes are fully understood. The CAA particularly needs this research to:

- Update the evidence on how people make air travel decisions, what information they use and value, and what if any gaps in provision there may be;
- Explore the hitherto under-researched topic of attitudes to the air travel safety and security; and
- Provide insights into the views and experiences of PRM and infrequent flyers.

The qualitative phase was particularly focused on:

- Exploring in detail consumers' perceptions of and attitudes to aviation safety and security, including how this impacts on choice and the air travel experience, and views on safety and security standards in aviation;

- Understanding infrequent flyers in more detail, including how their views about aviation compare to those of recent flyers and their reasons for not flying recently; and
- Asking PRMs about their access and usage needs, as well as about their experience of any assistance they have previously received.

2.3 Method and sample

6 group discussions with 7-8 people in each, 8 face-to-face individual interviews and 6 telephone interviews were conducted between 13th and 20th November 2014. The research was conducted in London, Manchester and Bristol. More detail on the method and sample breakdowns is provided below:



3. Main findings

3.1 Decision-making process and considerations

3.1.1 Air travel choices as part of an overall trip decision-making process

While for some people, choosing a flight was an important decision, it is important to recognise that flight choice could also be a ‘means to an end’ and just one consideration within a wider process of holiday or business trip planning. Therefore the decision-making process for some was perfunctory and done without too much reflection/consideration.

“We booked the whole trek and trip through Exodus. So actually the flight choice didn’t come into it because if you were going on the trek on that day you were going to fly on this day so... we had no choice really.” (Leisure traveller, 20-44, ABC1, Bristol)

Leisure travellers were sometimes more interested in the ‘holiday’ than the air travel experience (e.g. hotel, star rating, trip advisor reviews etc. may be more important than airline/flight choice).

“What I would want to know is, is it good for kids? Or am I going to turn up there and they go ‘mum there’s nothing to do here’” (Leisure traveller, 20-44, C2D, Manchester)

“I want to make sure it’s warm, especially when you’re booking in September” (Leisure traveller, 45+, ABC1, London)

For some business travellers short-haul flights were seen as ‘part of the commute’ and therefore the booking process could become routine and habitual.

“It’s just another commute. It’s part of your commuting journey” (Business traveller, 45+, Manchester)

Flight choice tended to assume greater importance where people had specific needs (e.g. PRM, young family) or where the flight was longer or more complex and therefore a more substantial part of the holiday experience.

“A few years ago I did Cyprus by Easyjet and it was a really long flight actually. I think it was about 4-4.5 hours and it was the most boring flight of my life because it’s not comfortable for that long. And there’s nothing to do. There was no telly, no food. I wouldn’t fly Easyjet for that kind of flight again” (Leisure traveller, 20-44, ABC1, Bristol)

The extent of active choice/decision-making varied considerably due to these factors, but was also dependent on the extent to which market comparisons were being made, as will be explored below.

3.1.2 Differences in market comparisons

The types of tools used to compare the market and the extent to which people fully uncovered market availability varied considerably.

Some people reported conducting full and varied searches, including visiting high street and

online travel agents, using online comparison sites such as Sky Scanner and Go Compare etc. However, these were in the minority and most used heuristics in relation to ‘value/cheapness’ or ‘quality/reliability’ to limit their searches to save time or due to pre-existing biases or preferences for certain airlines, destinations and operators.

Some limited their search to airlines that they perceived to be ‘cheaper’ (generally Easyjet and Ryanair) without comparing prices with other airlines, and then made trade-offs in terms of the departure day, time and/or airport in order to secure the cheapest flight. Some limited their search to ‘premium’ airlines that they perceived to provide quality of service and reliability they were looking for (especially in relation to business travel and long-haul destinations). Others limited their search to a single trusted operator, such as Thomson’s, and then looked for prices/dates/departure airports/destinations/flight times/hotels etc. within the operator’s offer.

Some business travellers delegated initial searches to other staff or external intermediaries, then choosing from an edited selection according to flight times, preferred airline (including consideration of air miles, on-board and lounge facilities for business class in some cases) or price. Other business travellers booked the same flight each time, only entering into an extended decision-making process where the price was unusually high or the flight unavailable.

“The secretary will look it all up. She’ll ask me what’s the price. It’s the times for me. Usually she’ll give me two different airlines, different prices” (Business traveller, 45+, Manchester)

Some leisure travellers preferred to delegate the ‘choice’ process to trusted intermediaries such as local travel agents. This was generally in order to avoid the ‘hassle’ of weighing up different options and combinations. It also took out the anxiety of having potentially missed out important details such as transfers, luggage allowances etc. There was a belief that the travel agent would provide them with a good ‘deal’ especially in relation to the balance between quality and price.

“I just want somebody to give me the options and the places, prices, and then I look at them and then I go from there” (Leisure traveller, 20-44, Manchester)

“I just start doing it myself but it’s too confusing all this, so I went to the shop” (Leisure traveller, 20-44, Manchester)

“If I was going somewhere that I had never been before, the knowledge of the agent is important because I haven’t got a clue” (Leisure traveller, 20-44, ABC1, Bristol)

Those who searched the market more fully tended to report a more ‘stressful’ experience than those who resorted to habitual or edited choices. Where people were exploring a range of options and comparing and contrasting between airlines, the purchase and comparison process was not seen to be transparent or easy to navigate due to ‘hidden’ costs such as charging for checked luggage, charging for allocated seating and various other premium services. This could result in a lengthy decision-making process and a possible nagging doubt about whether they had actually got the best deal or combination of flights.

*“When you do it on the internet it starts all good, then you’re p***ing about, putting the dates in, you put one date in wrong and you go to the end and you go back [to the beginning] again”* (Leisure traveller, 20-44, C2D, Manchester)

“You forget about little things like getting picked up from one place to the other. Transfers.”
(Leisure traveller, 20-44, C2D, Manchester)

“I always think it’s quite nerve-racking... as you’re investigating, everything’s dwindling away or the price suddenly changes.” (Leisure traveller, 45+, ABC1, London)

“With all the websites and travel agents and you sort of find a cheaper price and then you think, well, will there be a better one tomorrow, or if I look at another 10 places and make more phone calls, will I find better deals? So you never quite know if you’ve got the best deal” (Leisure traveller, 45+, ABC1, London)

3.1.3 Choice factors

As highlighted above, air travel decision-making was a variable and often complex process, with choices potentially influenced by a range of factors:

- **Market availability** (e.g. what airlines, prices, routes, schedules and airports it was possible to choose between, as well as how far in advance it was possible to book etc.)
- **Personal preferences and habits** (e.g. in relation to airline or holiday operator brands, and other default choices such as package holidays, aircraft type etc.)
- **Degree of flexibility or personal constraints** (e.g. being flexible on destinations, flight dates, routes and airports vs. having constraints related to any of these e.g. due to purpose of trip, travelling with children, health conditions, limited choice of local airports etc.)
- **Buyer behaviour more generally** (e.g. how spontaneous vs. planned and researched the decision was, who else was involved, what channels and tools were used to compare the market etc.)

Not surprisingly, price was claimed by most to be a major consideration when discussing their recent air travel decisions. However, the way prices influenced decision-making was not always clear-cut. For example, some people did not always compare prices between airlines but could alternatively consider other trade-offs with their chosen carrier as a way of accessing cheaper prices (e.g. choosing a more indirect route, inconvenient flight time or further afield departure or arrival airport). Some were also satisfied if the price ‘seemed reasonable’ and did not feel the need to shop around. In addition, there was a common view that determining the best price is not a straightforward process, with a number of additional costs that need to be taken into consideration.

“To save about £30-£40 to go from another airport you sometimes think with the taxis and the drop offs you might as well just go from your local, Manchester. Time is the essence when you’re away” (Leisure traveller, 20-44, C2D, Manchester)

“The next thing I look at after the price is probably the baggage allowance because we do travel very heavy. So if I’ve got to pay an extra £50 to get up to 30 kilos per case then that’s cheaper for me to do that than pay for a cheaper flight but then get whacked with excess

baggage charges” (Leisure traveller, 20-44, ABC1, Bristol)

Flight times or routes were a priority for some people, but preferred options were not always possible to secure in which case it may need to be discarded as a consideration.

“You try and get nice flight times where you get in there nice and early where you’re going and then you’re going home late but that’s not always possible... the last couple of times I’ve had to get up about 5 o’clock in the morning” (Leisure traveller, 45+, C2D, London)

“My criteria (sic) is direct flights. I only go short haul so I don’t want to be stopping off anywhere. But with some of the locations I go to... it’s actually quite difficult to get to direct from Manchester” (Business traveller, 45+, Manchester)

Previous experience with, and the reputation of, airlines and/or travel companies were often important, and most had some sort of consideration set. For some business flyers, the possibility of collecting air miles also contributed to airline preferences.

“For me the airline’s very important, because very often you know, those budget airlines when you actually go online, you look at the price and then you go back to those better reputable airlines and you compare the price, it’s better to go with those... I usually will go for British Airways rather than Easyjet, because sometimes they give more flexibility” (Leisure traveller, 45+, ABC1, London)

“I trust them [British Airways] and they’ve got a good reputation and they’ve never let me down” (Leisure traveller, 45+, ABC1, London)

“I’ve never had a problem with the budget airlines. I’ve never had delays or anything with them. I mean obviously you’re cramped up... but you get your seats” (Leisure traveller, 45+, ABC1, London)

There were different priorities for long haul compared to short haul travel. For long haul trips the air travel experience tended to mean more and people were more likely to consider the quality of an airline’s service, the type of plane or its on-board facilities.

“If you’re flying more than 10 hours, normally I go for a bigger airline, like the aircraft A380, so you get better legroom and if you look at the map sometimes they tell you how to find that seat in the plane” (Leisure traveller, 45+, ABC1, London)

“If I was flying long haul... I’d certainly go to one of the best airlines – BA, Virgin” (Leisure traveller, 45+, C2D, Bristol)

By contrast, environmental impacts, as well as reliability and punctuality of airlines, were not mentioned by any participants as choice factors in their decision-making. In addition, safety and security did not appear to be overt considerations as will be explored below.

3.1.4 Safety and security as choice factors

There was little to no reference to safety and security as considerations in flight choices. It was only mentioned explicitly in one instance where the person had to book Ethiopian Airlines for a safari trip at the same time as the Malaysian Airlines tragedies/Ebola outbreak. While this

caused the person some concern it did not prevent her from booking.

On prompting, some said that they would now avoid certain airlines or destinations, but in most cases these exclusions were unlikely to have ever been considered options e.g. Aeroflot, West Africa. Some travellers also mentioned editing out Middle Eastern package holiday destinations (e.g. Egypt, Turkey) from their consideration set, however others had recently travelled to these locations and mentioned perceptions of risk but discounted them based on personal experience.

“I wouldn’t go back to Egypt now with what’s going on” (Leisure traveller, 20-44, C2D, Manchester)

“I wouldn’t fly Aeroflot. They’re really old cargo planes. Poor safety and the customer service is terrible” (Business traveller, 20-44, London)

3.1.5 Decision-making information sources and needs

A lot of information sourcing and booking was done online but, as mentioned before, travel agents and intermediaries were also used, particularly by older and less frequent flyers, those wanting a package holiday and some business flyers.

Previous personal experience and advice of friends and family were also seen as important sources of intelligence. In terms of specific online sources, price comparison sites were commonly used. Tripadvisor was also popular to guide accommodation choices. In addition, a small number used specific tools such as SeatGuru or airline ratings sites to make flight-related decisions.

“I looked at the reviews [on Tripadvisor] but I also specifically look for people that went with kids the same age, and then I contacted them direct... through their email” (PRM, Female, London)

“My parents flew South African Airlines and they said they were good – I’d consider them” (Infrequent flyer, Male, London)

Overall, most people felt that they had sufficient information available to them and were well equipped to make good travel choices. There was not a major appetite overall for more information. However, this is not to say that choices were always optimal because people were often making heavily edited choices based on a limited consideration set.

There were also some specific situations in which people felt less informed:

- Those travelling to new (previously not visited) destinations, more unusual trips (e.g. safaris, ‘once in a lifetime’ holidays, golf holidays with kit), or more complex journeys (e.g. multiple stop-offs) tended to be less confident that they had all the information they needed to avoid any pitfalls.
- Some more infrequent flyers and older travellers found the process of booking online confusing and stressful. In particular, they were anxious about ‘getting something wrong’ and being liable for hefty fees to correct this.

“I did get all the information but there was things like when you leave Mexico you have to

pay to leave but it was written in nothing” (Leisure traveller, 20-44, C2D, Manchester)

“Everybody can make a mistake but with these airline companies you make a mistake and they just charge you a load of money. So you’re paranoid about getting it right” (Leisure traveller, 45+, C2D, Bristol)

“Going from Bristol to Newcastle, I know exactly where I’m going, whereas you get off in Kilimanjaro, where on earth are you going? You can’t read in Swahili. That can be stressful” (Leisure traveller 20-44, ABC1, Bristol)

More generally, there was a view that air travel pricing, while competitive, lacked transparency and could be confusing. For example, people mentioned not understanding differences in pricing between websites for seemingly identical airlines and flights. In addition, and of greater concern, were the apparently hidden costs on some websites (e.g. where the initially advertised price excludes checked luggage, taxes and credit card fees).

“The more you click on to get to the end, there’s another extra cost added, so sometimes the websites they’ll initially give you a fee, but then you’re going through and you think, I’m going to need my luggage, because I can’t go away for a week with just hand luggage, so that’s an extra that is so much, so in the end it’s not such a good deal that you think it’s going to be” (Leisure traveller, 45+, ABC1, London)

“It all gets a bit confusing, it’s all so competitive and then I often wonder why the airlines vary their prices from website to website” (Leisure traveller, 45+, ABC1, London)

There was also perceived to be some lack of fairness in pricing, the main example cited being the differential between school holidays and term time prices.

“They should do more to stop them putting up the prices when it comes to the school holidays” (Leisure traveller, 45+, C2D, Bristol)

3.1.6 Information needs at the time of decision-making and booking

As mentioned above, most people felt they had all the information they needed to make informed decisions and did not require more information. Where people more information was sought it was generally due to a more complex travel journey – e.g. facilities at stopover airports, more information about connecting flights, or because they had been ‘stung’ with additional charges (e.g. baggage allowance, charges for not bringing printed tickets).

“We had 4 hours at Abu Dhabi, which was awful, there was nowhere to sit! I wish I’d known in advance” (Leisure traveller, 45+, ABC1, London)

“Coming back on those aircraft with no reclining seats. If I’d have known that I’d have booked a different aircraft. There was no way I’ll travel on that again” (Business traveller, 45+, Manchester)

People were not looking for information about safety and security at time of booking, and nor were there any requests for information about environmental impacts, airline reliability or timeliness.

“It’s never in my thought process before I book my holiday – safety” (Leisure traveller, 45+, ABC1, London)

3.2 Attitudes to, and experience of, air travel

3.2.1 Attitudes to air travel

Air travel was inextricably associated with the excitement of travel and, for most of those involved in this research, the commencement of a holiday. Even business travellers could experience some excitement when travelling long-haul or to new destinations, especially if travelling in business class.

However, travellers tended not to have very high expectations of the air travel experience itself. This is because it was associated with being processed and confined for lengthy periods, and potentially facing issues outside their control (queues, crowded conditions delays etc.).

“You’re paying for what you get, aren’t you, so your aspirations are not high” (Leisure traveller, 45+, ABC1, London)

“It’s just a nightmare experience from start to finish. You get on the plane... and the pitch is getting smaller and smaller. So you’ve got to pay more and more to move further up the plane to get a bit more comfort” (Business traveller, 45+, Manchester)

Those who looked forward to flying are often expecting a better experience due to travelling in a premium class. Only a minority of those who fly economy expect to enjoy the experience end-to-end.

“I’m going to Jamaica tomorrow and I’m dead excited because I’ve booked the VIP lounge” (Leisure traveller, 20-44, C2D, Manchester)

A minority of travellers also reported feeling anxiety at the prospect of air travel. This could have a number of motivations:

- Business travellers could be very time-pressured and concerned about whether they would be let down/inconvenienced by delays or tired on arrival.
- PRMs could find the experience of air travel extremely uncomfortable and tiring.
- Passengers travelling with young families could have concerns about their children’s behaviour and/or comfort, controlling their children and safety of children in the airport and on the flight and about whether they had remembered everything they need.
- Nervous fliers could feel apprehensive about the flight experience well in advance of boarding the plane.
- People could feel anxiety about the destination experience where they were flying somewhere new: how user-friendly the arrival airport would be, whether they would easily find onward transfer, quality of hotel and expected holiday experience etc.

“[With children] you don’t know how they’re going to react. I took my 2 year old last year for

the first time and he had an ear infection. I was dead scared he was going to start screaming and whinging and then you're worried about everybody else" (Leisure traveller, 20-44, C2D, Manchester)

"I'm a bit nervous at first because I think I'm going to get charged because my case weighs too much" (Leisure traveller, 20-44, C2D, Manchester)

"I get quite irritated by just wondering if I'm going to get someone who's slightly rotund next to me, or very noisy children around, so I get a bit edgy about 'is this seat going to be the right seat?'" (Leisure traveller, 20-44, C2D, Manchester)

"Business flight is just a means to an end. You know it's not going to be pleasant. You know it's going to be time consuming and time wasting but unfortunately it's just something that you have to undertake to get where you need to go" (Business traveller, 45+, Manchester)

3.2.2 Experiences of air travel

For many, the actual experience of their most recent journey met their low expectations and was found to be 'stressful' and 'exhausting'.

"It is a rollercoaster of emotions I think. I'm always exhausted whether I do a 1 or 2 hour flight, or a 10 hour flight, I feel absolutely exhausted at the end of the journey. It's a good point – then a bad point!" (Leisure traveller, 45+, ABC1, London)

Travel-related stress could commence from the time of leaving home if there were worries about the transport or arriving on time. At the airport, each of the main touch points (check-in, security, boarding, departure) could cause frustration if they were not smooth running. In addition, getting settled on-board could come with its own anxieties (e.g. will there be enough overhead luggage space, who will I be sitting next to), and there was also the anticipation of unknowns at the arrival side (e.g. what is immigration going to be like, will my bags arrive, will it be straightforward to access the onward transport).

"[The] stress of so much of flying. Just making sure you've got your tickets and you get there on time and all of that." (Leisure traveller, 45+, ABC1, London)

Highlights of the air travel experience were generally characterised by 'smooth' processes (i.e. absence of problems) and 'added value' to their experience, including good shopping/refreshment facilities at the airport and friendly, helpful staff.

"For me it just flew by. We walked in, there was no queues... straight in. That was Easyjet and it's the first time I've ever done it. A couple of minutes, everything gone, I was away. Very easy" (Leisure traveller, 45+, C2D, Bristol)

"I had a very early flight to New York from Heathrow Terminal 5... I was through in no time, it was City airport quality" (Business traveller, 20-44, London)

Conversely, incurring a significant problem (e.g. flight delay or cancellation, lost luggage etc.) would not surprisingly contribute heavily to a poor experience. In addition, a range of other factors could also cause inconvenience or frustration:

- Travelling to airport – e.g. transport delays, heavy traffic.
- At the airport – e.g. crowding, queues, long walks to departure gates, unhelpful or unfriendly staff, and lack of facilities for children and families.
- On-board – e.g. problems with seats, overhead luggage space, neighbouring passengers, food or entertainment.
- On arrival – issues with visas, long waits to retrieve luggage or problems with onward transport.

“We were at Luton in September and it was just crazy busy. There weren’t enough seats in the waiting area for everyone. There was loads of people standing around, it was really hustly and bustly and it was like 6 in the morning, people drinking already.” (Leisure traveller, 45+, ABC1, London)

“You know what’s annoying? As you sit down on the plane someone in front of you, even if they’re quite small, they bang their chair straight back” (Leisure traveller, 20-44, C2D, Manchester)

“The only stress I’ve got is how my 2 year old behaves, about how he’s gonna behave on the flight and running up and down the aisles and all that” (Leisure traveller, 45+, ABC1, London)

“When we came back into Manchester we waited an hour and a half to get through passport control. That was quite hard” (Leisure traveller, 20-44, C2D, Manchester)

“Finding your luggage, that’s stressful in itself, because sometimes your luggage gets lost and it’s all more stress isn’t it?” (Leisure traveller, 45+, ABC1, London)

3.2.3 Information needs while embarking on the air travel journey

Despite the variability of flight and airport experiences, there was no real demand for more information related to any aspect of the journey. Signage and real-time flight information was felt to be generally good in the airport. People were often distracted and busy as they went through the airport procedures and felt they would not find time to read more information. Some people were also aware that there were a number of smartphone apps/text alerts to update them about flight delays etc. which meant they were not entirely dependent on in-situ information

“You get most of the information about your flight from your apps. So you don’t even have to look at the view. You just go on your app and it tells you whether it’s due, it’s late, what time” (Business traveller, 45+, Manchester)

People generally felt that a ‘good’ flight experience often came with trial and error of previous experience – they learnt the ‘tricks’ of the departure airport they had selected which meant they could avoid problems (e.g. when security was less busy, organising liquids into a transparent bag before arrival at the airport, the best places to wait/eat etc.).

“I went to Ibiza in September and didn’t print off my boarding pass. For two of us [it was] 170

Euros” (Leisure traveller, 20-44, C2D, Manchester)

“You learn when the queues are smaller for security – early in the morning you just sail through” (Business traveller 45+, Manchester)

3.3 Safety and security

3.3.1 Overall views

When they were prompted, it was apparent that travellers associated safety and security issues with flying more than with other forms of transport, even though many knew that it is ‘statistically the safest form of travel’. Some of the reasons for this were:

- The prominence of airport security screening and on-board safety demonstrations.
- The view that any accident or incident involving a flight is likely to have catastrophic consequences.
- The high profile cases reported in the media, from 9/11 through to the two relatively recent MH flights.
- People feel that they have no control or agency in preventing these catastrophic consequences.
- A minority felt less comfortable with the concept of air travel than land or sea-based travel.

“It’s just the fact that you can’t get out. If there’s turmoil that’s it now, [I can] climb out the car window if the car goes over” (Leisure traveller, 20-44, C2D, Manchester)

“You are worried because you’re up in the air and it’s just not natural is it?... I always look at the luggage going on if I’m by the window and I’m thinking, how does this bloody thing stay up there?” (Leisure traveller, 45+, ABC1, London)

At the time of research, fears and concerns in relation to the two Malaysian Airlines disasters were already beginning to recede, although people mentioned avoiding Malaysian Airlines flights. However, 9/11 was still mentioned as a ‘watershed’ moment when taking safety and security for granted became no longer possible.

“They went through a period where there was quite a few crashes. So it makes it more prominent. [You think] what the hell’s going on? But after a few months you forget” (Business traveller, 20-44, London)

“You think about it more since what we know as terrorist acts. Since the twin towers. I’d go on an aircraft and my dad would always say, ‘stewardess, can my son meet the pilot?’ I would go up and sit with my dad in the pilot seat at the left, and he’d say ‘these are the Pyrenees’ and he’d put his hat on me. Wow. You wouldn’t dream of doing that now because of the security threats.” (Leisure traveller, 20-44, ABC1, Bristol)

There were a variety of feelings expressed about safety and security. There were clearly some people who were inherently more nervous and fearful flyers, and others who were not as concerned about safety and security. More frequent travellers tended to be more sanguine.

“In comparison to every other travel it’s safe as houses isn’t it, so I don’t know what you’re worried about” (Leisure traveller, 45+, ABC1, London)

“I think it’s very safe and secure. You only have to look at the crash record. It says how many flights take off a day around the world. You never hear one thing.” (Business traveller, 45+, Manchester)

“The more you fly, the more comfortable you become” (Leisure traveller, 45+, C2D, Bristol)

There was also an aversion to thinking too deeply about the reasons for safety and security measures while flying. In-depth discussions of safety and security made many, especially nervous flyers, feel anxious and stressed. For this reason, people tried to put the reasons for the safety/security procedures out of their minds and concentrate on the processes. Most flyers would not contemplate stopping or reducing flying for safety or security reasons. As mentioned previously, there were very few mentions of avoiding airlines, destinations or routes because of safety or security fears.

“I don’t think about things like that. I just book it and I get on with it, but now talking about all this it’s like ‘oh my word, all this could go wrong!’” (Leisure traveller, 45+, ABC1, London)

“It’s not in the forefront of my mind, but it’s always in the back of my mind. You hear stories and things and worry about, you know, if you’re going to land safely. If it was in the forefront of my mind obviously I wouldn’t travel. But it’s in the back of my mind, you know, this nagging thing” (Leisure traveller, 45+, ABC1, London)

“I’m not the biggest fan of flying. I don’t particularly like it. I’d rather not but then I’d rather go on holiday so I do it. I’m not going to not do it because there’s a bit of a risk” (Leisure traveller, 20-44, ABC1, Bristol)

3.3.2 Public understanding of safety and security

Safety and security were understood to go hand in hand – in consumers’ minds both security and safety measures contributed to the passenger feeling safe. However, when prompted they were also able to split out the two concepts, the prevailing division being:

- Security – focused on terrorism, takes place in the airport
- Safety – focused on accidents, takes place on/concerning the plane

“Safety, like the age of the plane, the parts, the checks. Security is the people who want to harm you” (Business traveller, 45+, Manchester)

Safety was additionally thought to have a wider remit than ‘accidental harm’. Participants included in the definition:

- protection from drunk or unruly passengers whilst in air;