

Civil Aviation Authority

Consumer Tracker for the Aviation Sector

Wave Three, Report: July 2017

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Ipsos Loyalty

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Background to the research

This is the third wave of research that the Civil Aviation Authority (CAA) commissioned Ipsos MORI, an independent research organisation, to conduct in order to develop a deeper understanding of UK consumers' flying behaviours and their attitudes towards the aviation industry. This independent research, carried out in accordance with the requirements of the international quality standard for market research, will help inform the CAA's work to put consumers' interests at the heart of the way it regulates the aviation market.

The main objectives of this research are to:

- Understand flying behaviours and attitudes towards flying, including barriers for non-flyers and priorities for choosing future flights
- Understand perceptions of the aviation industry in terms of levels of safety, choice, value and fair treatment, environmental performance and security, as aligned with CAA's four strategic objectives set out in the strategic plan for 2016-21
- Measure satisfaction with the flying experience
- Understand awareness of rights in the aviation sector among UK consumers

Methodology

- In this third wave of research, we have continued to use the same methodology as in previous waves, in order to understand how behaviour and attitudes change over time.
- A total of 3,502 interviews were conducted with a nationally representative sample between 6th March and 27th March 2017. 3,002 interviews were conducted online and 500 were conducted over the telephone.
- This mixed methodology approach was adopted to make the survey as inclusive as possible. Conducting the survey by telephone meant it was possible to capture those that are not online and conducting an online survey enabled us to interview certain groups that tend to be more difficult to reach by telephone (e.g. younger males).
- For the online interviews, participants were recruited from Ipsos' online panel. For the telephone interviews, these were predominantly conducted through a random digit dialling approach, but some targeted sample was also included.
- To ensure the sample was nationally representative, interview quotas were set to reflect the UK adult population in terms of gender, age, region and working status. Where the final number of interviews did not exactly match quotas, weighting was then applied to the final data according to these criteria.
- The questionnaire was designed to average 12 minutes online and 15 minutes by telephone. To keep the telephone interview length to a minimum, some questions were only asked on the online survey and not the telephone survey. This is highlighted in this report where this is the case.
- This research has been conducted in accordance with Ipsos MORI's standards and accreditations (see the appendix to this report).

Analysis

- A large sample size was used overall for this study to allow for sub-analysis by key groups. Key subgroups in the report are:
 - **Recent flyers**, defined as those who have flown in the 12 months before research took place (unless otherwise stated).
 - **PRM (Persons of Reduced Mobility)**, defined as those who have a disability or health condition that limits their day to day activity.
 - Physical condition; something that affects your movement, balance, vision or hearing etc.
 - Non-physical; something that affects your thinking, remembering, learning, communication, mental health or social relationships.
- Throughout this report only differences that are statistically significant to the 95% confidence level have been commented upon. If a result is statistically significant it is unlikely to have occurred by chance and it simply means there is statistical evidence of a difference between two figures; it does not mean the difference is necessarily large, important or significant in the common meaning of the word.
- Where we have identified a significant change between this wave (March 2017) data and previous waves, this is indicated. An upward arrow shows a significant increase and a downward arrow shows a significant decline. ▲ ▼ Solid Arrows show changes between this wave and the second wave (October 2016). △ ▽ Hollow arrows indicate a year-on-year significant difference, between March 2016 and March 2017.
- Alternate arrows show a result that is significantly higher ▲ or lower ▼ than a specified subgroup.

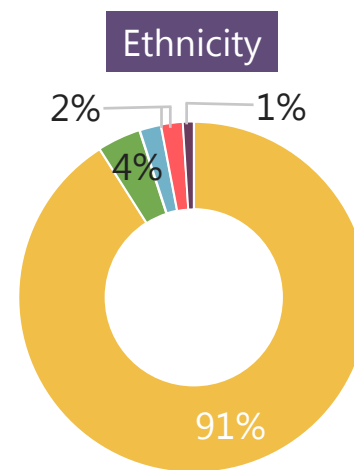
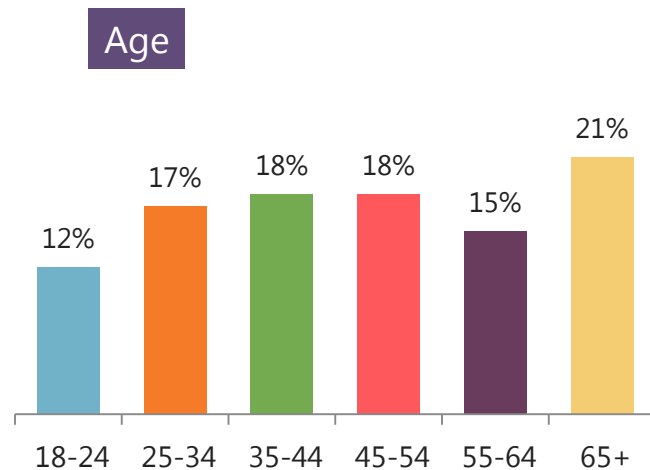
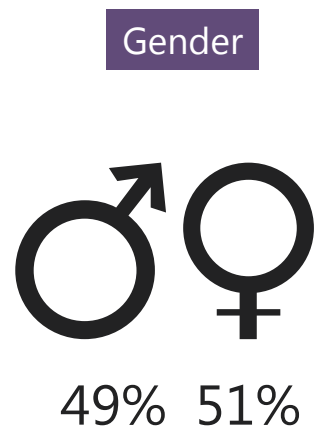
Weighting scheme

Quotas were set on the survey, based on 2011 UK Census information. At the analysis stage, small scale weighting was applied to the overall sample to address any small discrepancies in the achievement of the quotas.

Category	Sub-category	Weighted proportion	Unweighted proportion
Gender	Male	49%	49%
	Female	51%	51%
Age	18 – 24	12%	12%
	25 – 34	17%	16%
	35 – 44	18%	18%
	45 – 54	18%	18%
	55 – 64	15%	16%
	65 +	21%	21%
Working status	Working Full Time	41%	42%
	Working Part Time	17%	17%
	Not Working	42%	41%

Category	Sub-category	Weighted proportion	Unweighted proportion
Region	North East	4%	4%
	Yorkshire & Humber	8%	8%
	North West	11%	11%
	East Midlands	7%	8%
	West Midlands	9%	9%
	London	13%	13%
	South East	14%	14%
	Eastern	9%	10%
	South West	8%	9%
	Wales	5%	5%
	Scotland	8%	8%
	Northern Ireland	3%	3%

Demographic (weighted) sample profile



- White
- Asian or Asian British
- Black or Black British
- Mixed
- Chinese or other



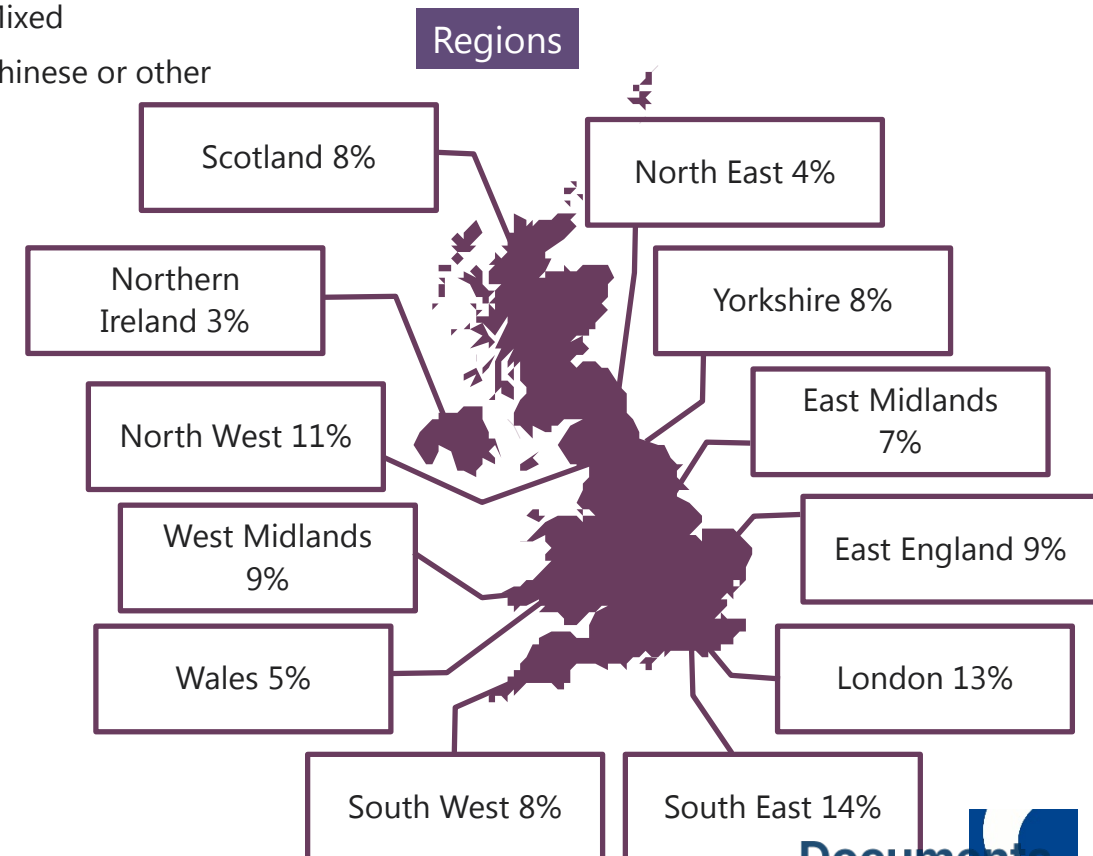
91% of those interviewed by phone have internet access

Working Status

Employed full time (30+ hours per week)	41%
Employed part time (8-29 hours per week)	15%
Employed part time (under 8 hours per week)	2%
Not working	8%
Retired	21%
Housewife/househusband	6%
Student/full time education	6%

Household Income

Up to £14,999	14%
£15,000-24,499	17%
£25,000-39,999	25%
£40,000-74,999	21%
£75,000 or more	9%



Executive Summary



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Executive summary: headlines

The air travel behaviour of UK consumers remains consistent with previous waves of this research; over half (54%) have flown in the past 12 months and 5% have never flown. Most flights are taken for holiday purposes (87%). The biggest barrier to flying is consistently budget/cost constraints (41% of those that haven't travelled in the past 12 months).

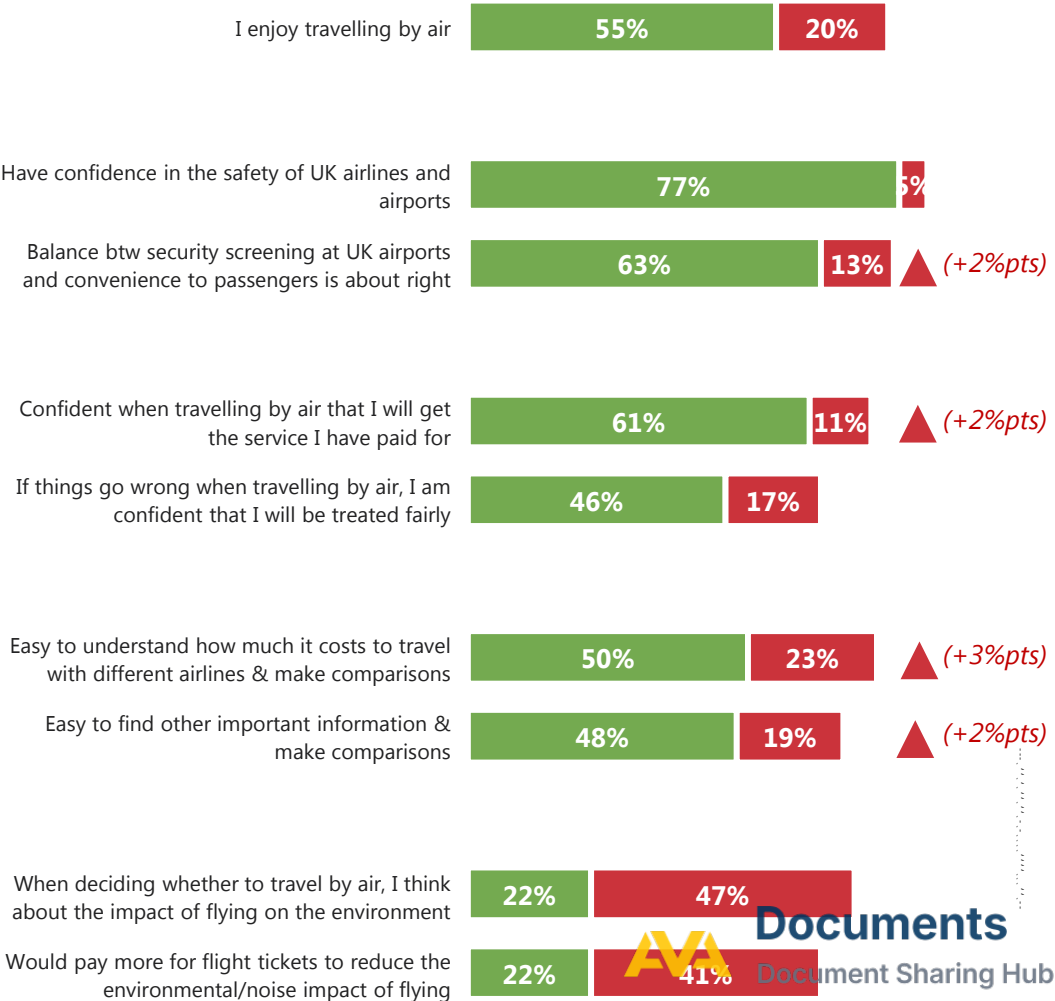
Enjoyment While consistently over half of UK consumers enjoy travelling by air (55% in wave 3), there remains some polarisation of views with a quarter (25%) strongly agreeing and a fifth (20%) disagreeing. Those with recent flying experience are more likely to agree than those who have not flown recently. PRM who need assistance when flying (25%) are more likely than average to disagree, and this disagreement increases further when PRM who need assistance flying also have non-physical disabilities (33%) or hidden disabilities (27%).

Security & Safety Confidence in the safety of UK airlines and airports is consistently the highest rated headline measure, with three-quarters (77%) agreeing. Despite a significant increase in disagreement, still almost two-thirds (63%) agree that the balance between security screening and passenger convenience at UK airports is about right. Where there is disagreement, UK consumers are more likely to say there is too much focus on security.

Consumer Confidence Consumers are still generally confident they will get the service they have paid for (61% agree, 11% disagree), but there is less confidence in fair treatment in the event of a problem (46% agree, 17% disagree). When disruption was experienced on the last flight, disagreement is increased (21% and 31%, respectively).

Consumer Choice Around half of respondents continue to agree that it is easy to understand and make price comparisons. There have been small but significant increases among those disagreeing. PRM are less likely to agree with both statements than non-PRM.

Environment Consideration of the environment remain the lowest rated headline measures, with around a fifth thinking about the impact or willing to pay more to reduce it (22% for each measure). 18-24 year olds show the greatest concern for the environment and those age 65+ the least.



Travel experience

Seasonal trends in the flying patterns of UK consumers are confirmed, but a small number of airports and airlines make up the majority of recent flying experiences. Whilst overall satisfaction remains high, there is a slight but significant decline since March 2016, accompanied with a fall in ratings of airport experience and airport security.

Overall

- Overall satisfaction with the most recent travel experience is high (87%) but has fallen year-on-year.
- Satisfaction across all measured touchpoints is largely consistent with previous findings, with just a few important exceptions that appear to be impacting on overall satisfaction.

Airport Experience

- As with the overall satisfaction metric, there is a significant fall in the year-on-year ratings of the airport experience in the UK.
- Examining the airport experience in more detail, several ratings of several touchpoints have fallen. In particular, ratings of airport security shows a significant drop since October 2016, while ratings of passport control; shops, restaurants and services and transfers and connections also show directional rather than statistically significant declines.

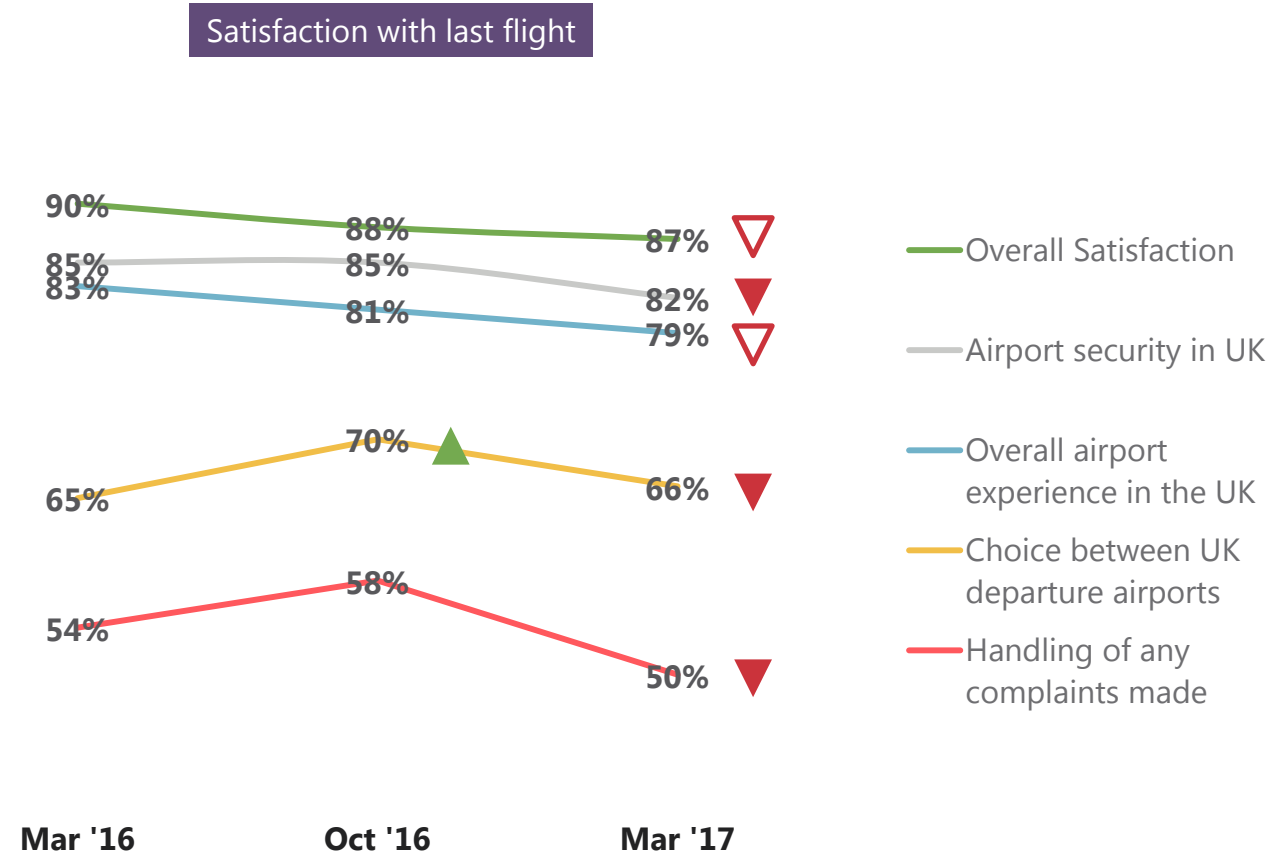
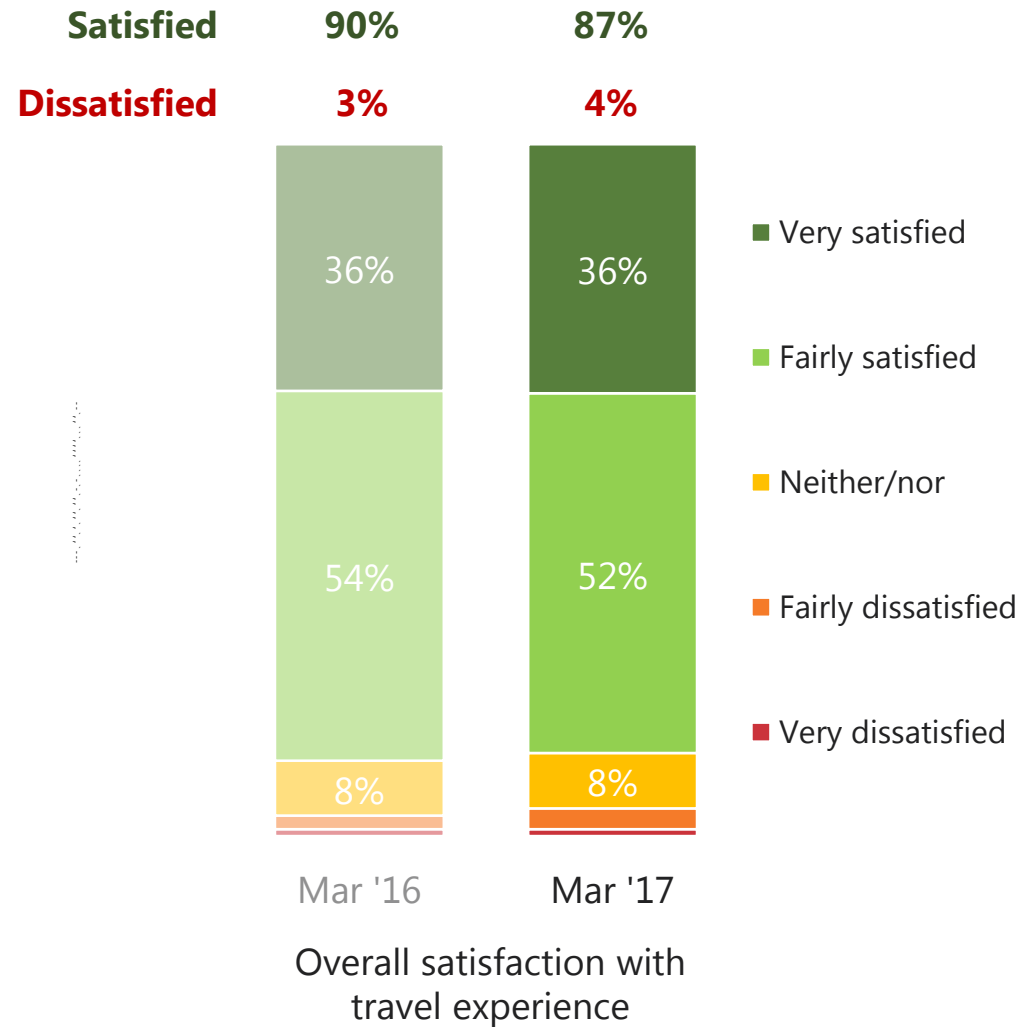
Airport Choice

- Satisfaction with choice between airports has dropped, having been rated more highly in October 2016. Satisfaction is lowest in the North East and South West of England.

	Satis fied	Dis- satis fied
Process of booking the flight	88%	4%
Finding way to gate	88%	4%
Ease of finding way around airport in UK	88%	5% 
Information about flight status at the UK airport	86%	5%
Deciding which flight to book	86%	4%
Travelling to/from airport in UK	83%	7%
Check-in and bag drop at airport in the UK	83%	5%
Baggage collection at the airport in the UK	82%	8%
Security at the airport in the UK	 82%	6%
Passport/immigration control in the UK	80%	8%
Overall airport experience	 79%	9% 
Overall on-board and in-flight experience	78%	7%
Ease of finding information to compare choices	78%	5%
Shop, restaurants & services at UK airport	76%	9%
Transfer/connection to another flight	74%	6%
Value for money	76%	8%
Amount of choice btw UK departure airports	 66%	12%
Amount of choice between airlines	64%	12%
Handling of any complaints	 50%	15%

Significant changes – travel experience

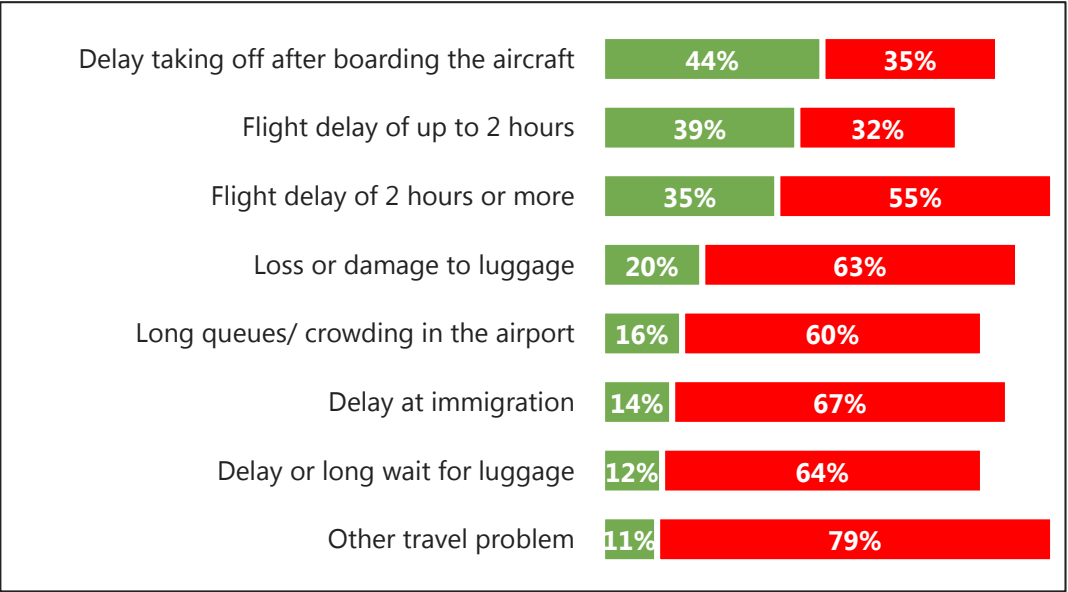
Overall satisfaction has fallen year-on-year, and a number of touchpoints appear to be pulling this figure down.



Disruption & understanding terms and conditions

Disruption

- Those who have experienced disruption give consistently lower ratings across the entire journey experience. The most commonly cited disruptions are crowding and long queues at the airport, delays once boarding prior to take-off and delays of up to 2 hours. A third (32%) of those who experienced a disruption were not informed of the reason for this.
- Satisfaction decreased in all aspects of complaint handling. 38% of those who had a complaint were satisfied with how fairly they were treated, falling to 32% satisfied with the redress offered. Only the speed of response to a complaint was more satisfying than dissatisfying.
- When looking at specific issues there is some variance in levels of satisfaction. Delays experienced in the airport environment yield lower satisfaction than a delay experienced on the aircraft.
- Over one third said a delay of up to 2 hours would make them feel extremely frustrated and cause them question using the airport or airline again.
- Amongst complainants, the majority (83%) did not escalate their complaints to a third party. For those who did, half (55%) were satisfied with how this was handled.



T&Cs

- Although just two fifths of those who have flown in the last 3 years claim to always read the terms and conditions, there is high awareness of baggage allowance and whether you need to provide your own boarding pass (printed or on phone).
- Awareness is notably limited when it comes to making changes to a booking; with lower levels of awareness when it comes to refunds if cancelled or if a member of the party was ill and could not travel for medical reasons and entitlements if flights are re-scheduled.

PRM experience

PRM profile

- Almost one in five UK consumers is a PRM (a Person of Reduced Mobility: someone who has a disability or health condition that limits their day to day activity). They are slightly more likely to be male and have an older age profile compared to non-PRM passengers. Half (49%) of PRM state that their disability does or would cause difficulties flying. 54% have a physical condition, 19% non-physical and 27% a combination of the two, whereas 61% have a hidden condition, 15% a non-hidden condition and 23% a combination of the two.

Perceptions

- PRM generally have poorer perceptions of flying than non PRM; they are less likely than non PRM to find other information that is important to them when searching for flights, less confident that they get the service that they paid for, less confident in the safety of airports and airlines and less likely to agree that the balance between security and screening is right.

Barriers

- PRM are less likely than non PRM to have flown in the last 12 months (34% vs 58%) and are more likely to have never flown (11% compared to 4%). PRM's that need assistance and either have non-physical or hidden disabilities are less likely to have flown in the past year compared to non-PRM. As with UK consumers overall, PRM's main barrier to flying continues to be cost and budget constraints (38%), with difficulties at the airport or in flight related to their health condition or disability the next biggest barriers to flying (25% and 27% respectively).

Experience

- When PRM do fly, satisfaction with the journey overall and across elements is high, although their levels of satisfaction are generally slightly lower than those of non-PRM passengers. The experience at the airport was the only aspect of the journey that PRM felt notably less satisfied with than non-PRM.
- PRM who flew within the last year felt better informed about the assistance available and more optimistic about their assistance needs being met during their journey than PRM passengers who had last flown more than a year ago. Satisfaction is typically high when assistance is requested for the journey (81%) and satisfaction is also high across elements of assistance.

Headline measures

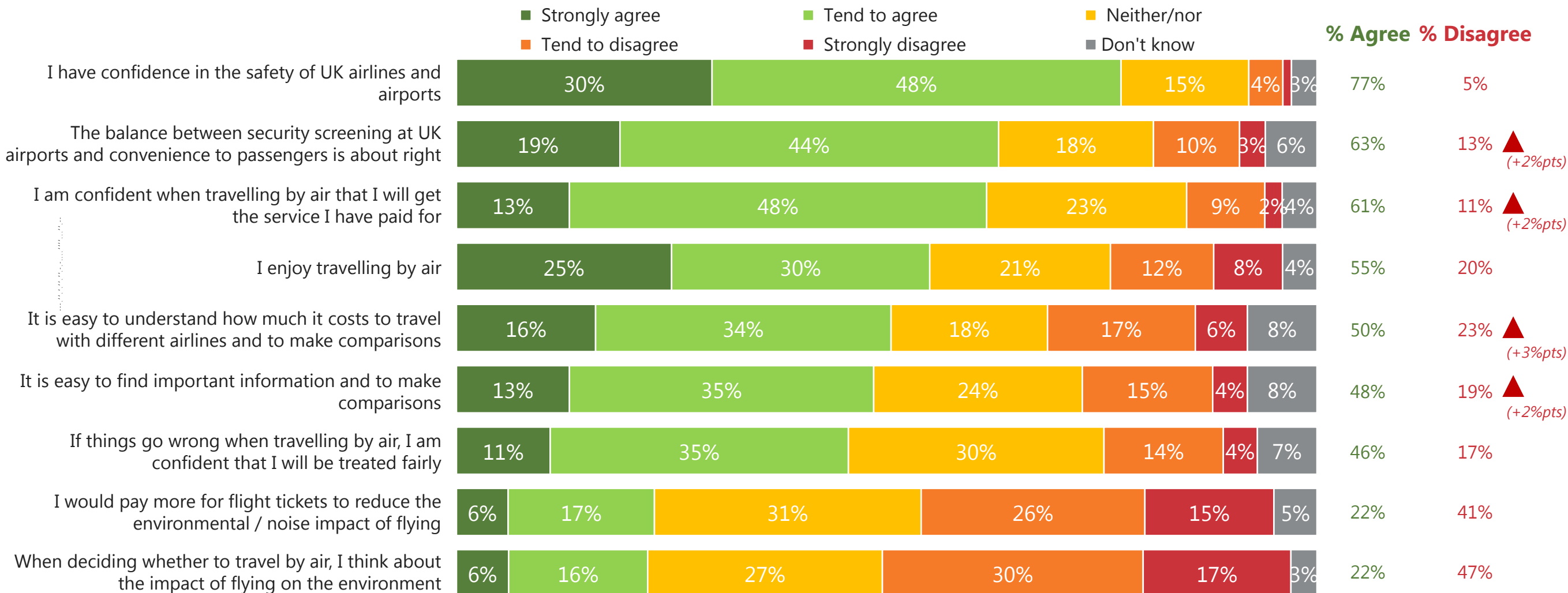


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Headline Measures: Overall

Three quarters of UK consumers are confident in the safety of UK airlines and airports, but only around a fifth consider the environmental impact when flying. There have been some small but statistically significant increases in disagreement with certain statements.

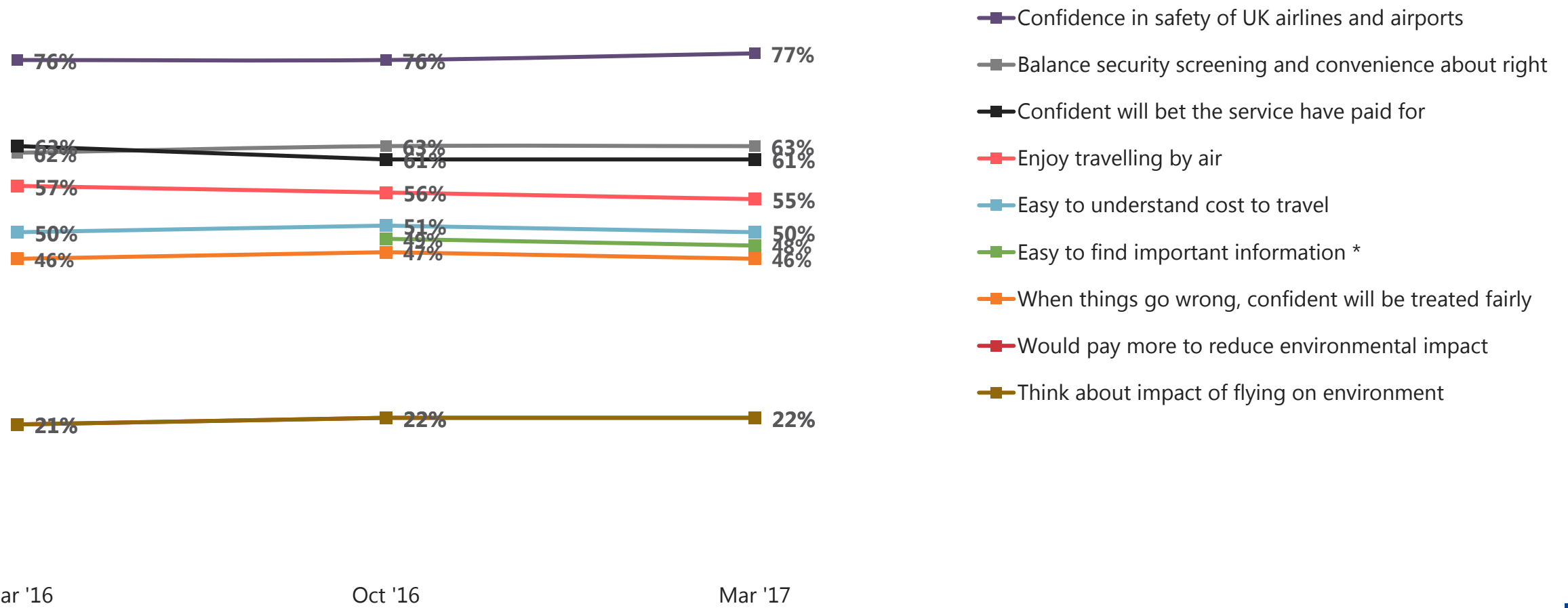


Headline Measures: Trend

Three quarters of UK consumers are confident in the safety of UK airlines and airports.

Agreement levels are unchanged against the previous survey waves.

% Agree



Mar '16

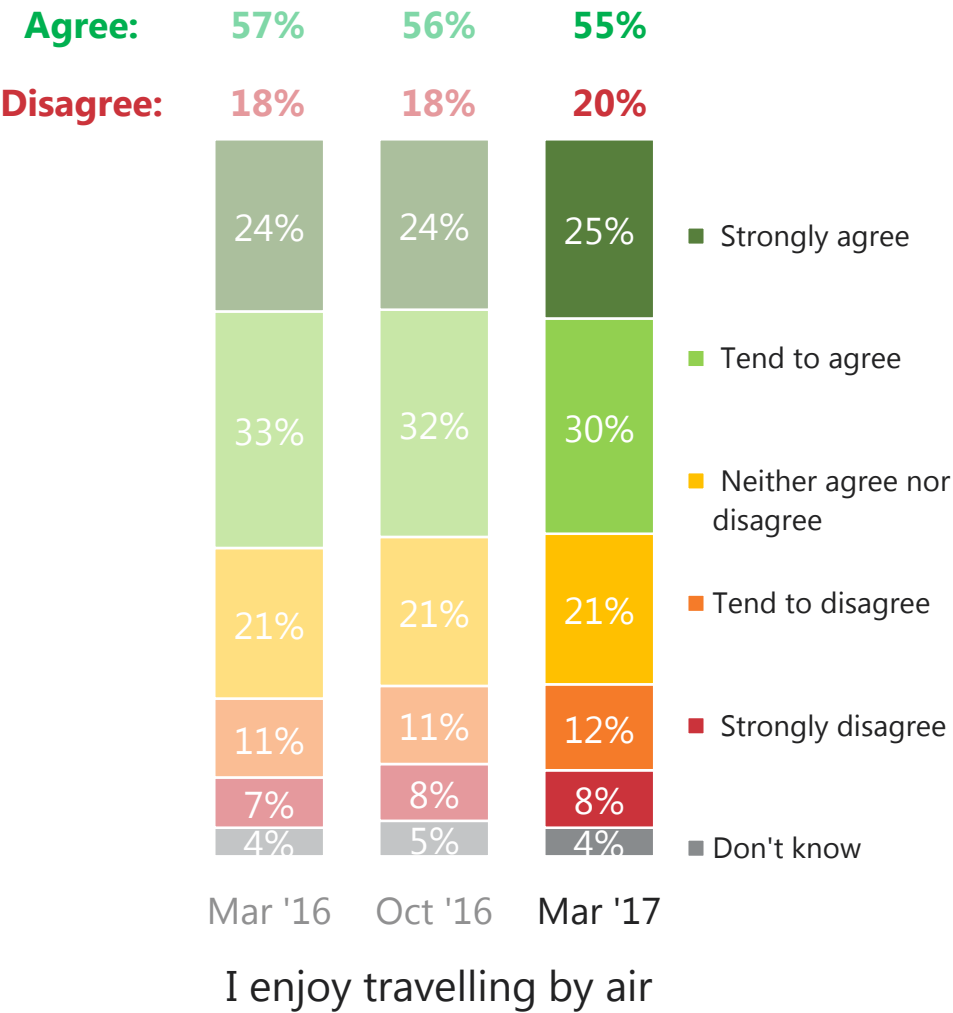
Oct '16

Mar '17

Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3502)
 *statement wording changed for Oct '16, hence no data shown for March '16.

Headline Measures: Overall

Consistently over half of UK consumers enjoy travelling by air, with a quarter strongly agreeing. A fifth disagree.



- Those with more recent flying experiences are more likely than average to agree that they enjoy travelling by air, with 62% of those flying in the past 3 years agreeing compared to 55% on average. Disagreement with the statement is higher amongst lapsed flyers, rising to 23% for those who last flew between four and ten years ago and 29% for those who last flew ten+ years ago.
- Those who anticipate flying more in the next 12 months are more likely to agree they enjoy flying (63%) whilst those who say they are likely to fly less are more likely than average to disagree (28%).
- Those whose last flight was in Business Class (70%) or Premium Economy (69%) are also more likely to agree that they enjoy flying.
- Certain subgroups of PRM are more likely than UK consumers overall to disagree that they enjoy flying. These include PRM with air travel difficulties (25%) and PRM who need assistance when flying (25%). When PRM who need assistance flying also have non-physical disabilities or hidden disabilities, this disagreement increases further, to 33% and 27% respectively.
- Differences in age and income reveal some differences in the enjoyment of air travel. Those with household incomes of £40,000-£74,999 are more likely to agree they enjoy flying (61%) than overall. In contrast, older consumers are more likely than average to disagree (23% of 55-64 year olds and 25% of those age 65 and over).

Flying
behaviour

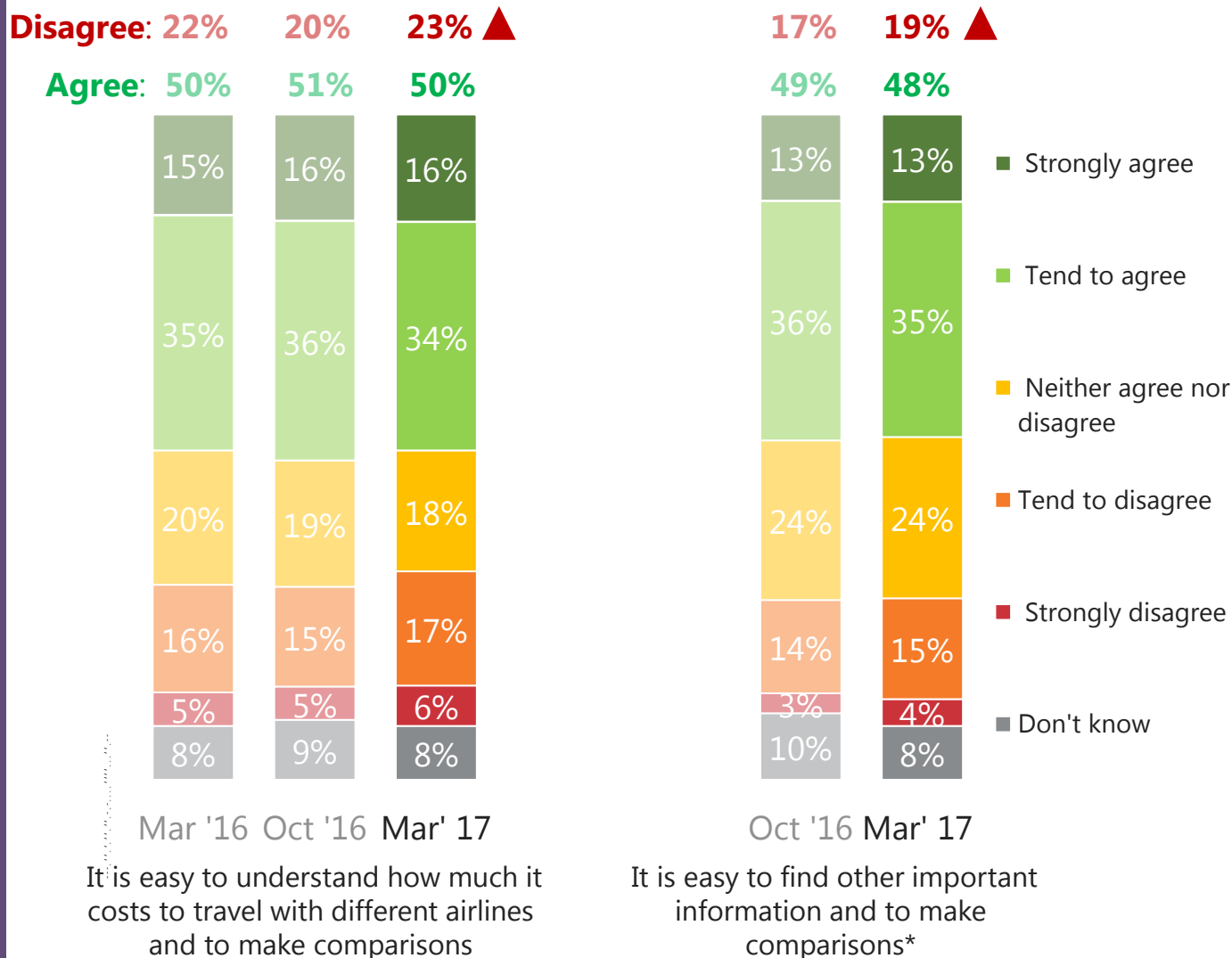
Cabin
class

PRM

Demographics

Headline Measures: Consumer Choice

Half of UK consumers find it easy to understand and compare costs of travelling with different airlines, and a similar proportion cite finding other important flight information easy. The proportion disagreeing has increased to almost a quarter and almost a fifth, respectively.



- Flying experience in the past 12 months correlates with higher agreement that costs are easy to understand (60%) and that other important information is easy to find (56%). Agreement is even higher among those that have travelled four or more times in the past 12 months (67% for ease of price comparisons and 63% for finding other information).
- Those whose recent flight was in Premium Economy are more likely to agree that price comparisons are easy to understand (67%) and that other information is easy to find and compare (66%) than other recent flyers. The same also looks true for those who travelled in Business, although the base size is lower to allow for a definite difference to be reported.
- Recent flyers who last booked online are also more likely than average to agree with these statements (63% that it is easy to compare prices between airlines and 58% for other important information).
- PRM are less likely than non-PRM to agree with these statements. 46% of PRM and 52% of non-PRM agree that it is easy to make price comparisons, while 42% of PRM and 50% of non-PRM agree that it is easy to find other information and make comparisons. Disagreement that it is easy to find other important information increases for PRM that need assistance (26%) or have air travel difficulties (24%).
- UK consumers with higher household incomes are more likely to agree that price comparisons are easy (56% of those with household incomes between £40,000 and £74,999 and 59% over £75,000) and that comparisons of other important information is easy (54% for both of those income groups).

Flying behaviour

Cabin class

Booking method

PRM

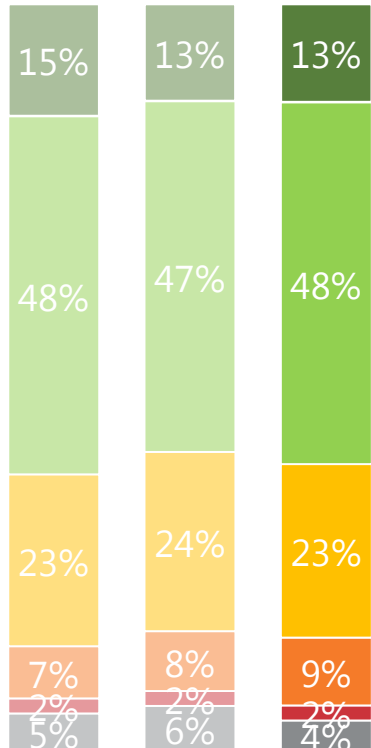
Income

Headline Measures: Consumer Confidence

UK consumers are generally confident that they will get what they pay for when they book, but are less confident that they will be treated fairly if things go wrong.

Disagree: 9% 9% 11% ▲

Agree: 63% 61% 61%

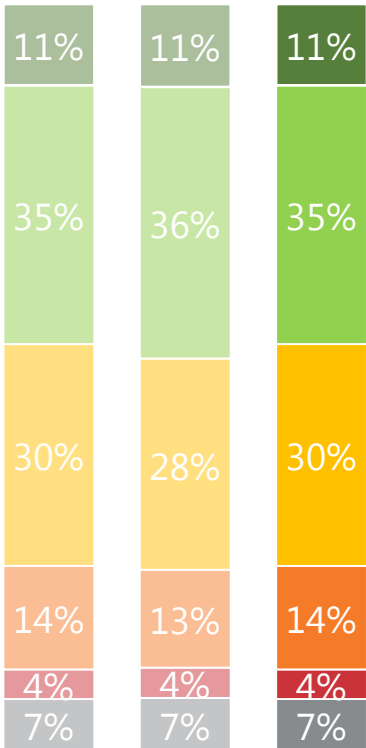


Mar '16 Oct '16 Mar '17

I am confident when travelling by air that I will get the service I have paid for

Disagree: 18% 17% 17%

Agree: 46% 47% 46%



Mar '16 Oct '16 Mar '17

If things go wrong when travelling by air, I am confident that I will be treated fairly

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

- Those with flying experience in the last three years are more likely than average to agree both that they will get the service they paid for when travelling by air (67%) and that they will be treated fairly (49%) if things go wrong. Although agreement levels hold up for those who have flown four+ times in the past 12 months, this group do have a more polarised view and show higher disagreement levels (14% and 23% respectively).
- Disruption on the last flight has an impact on opinion and leads to higher disagreement levels. 21% of those who experience what they perceive to be disruption disagree that they will get what they paid for, and 31% disagree that they will be treated fairly.
- When the last flight was for business purposes, recent flyers are more likely than average to disagree that they will get what they've paid for (17%) or that they will be treated fairly (26%). In contrast, 68% of those whose recent flight was for non-business purposes agree they will get what they paid for and 49% agree that they are confident they will be treated fairly, significantly higher than average.
- PRM (55%) are less likely to agree that they will get what they paid for than non-PRM (63%). When PRM disabilities are non-hidden and they need assistance when flying, disagreement with this statement increases to 18%, and this group are also more likely than average to disagree that they will be treated fairly if something goes wrong (26%).
- Those age 65+ (14% and 21%) and the highest earners with household incomes of £75,000 or more (16% and 24%) are more likely than average to disagree they will get what they paid for or will be treated fairly.

Flying behaviour

Disruption

Flight purpose

PRM

Demographics



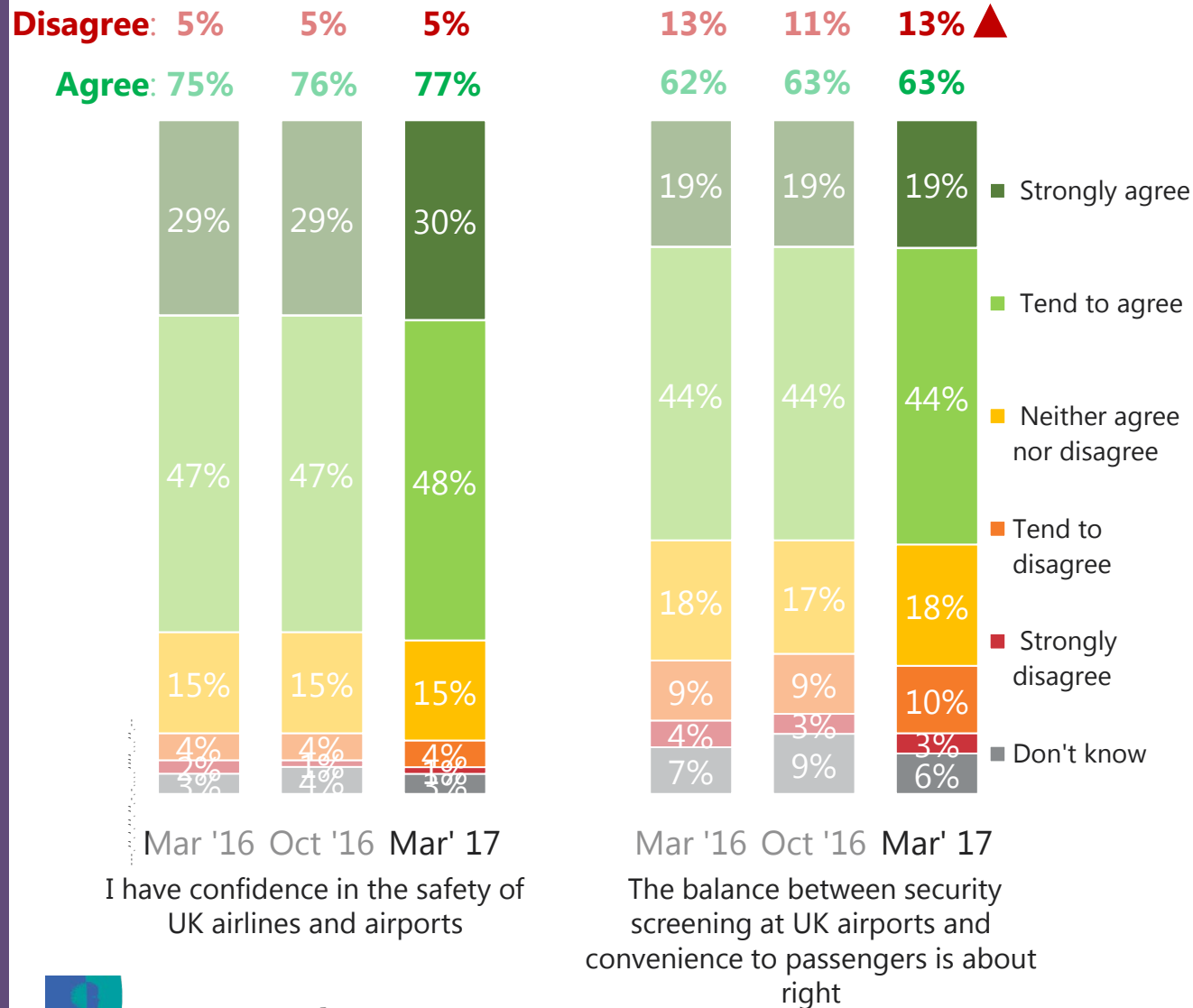
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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3502)



Headline Measures: Security and Safety

Confidence in the safety of UK airlines and airports is stable as the highest rated headline measure.



- As with other headline measures, those with more recent flying experience are more likely than UK consumers overall to agree. 83% of those that have flown in the past 3 years have confidence in UK airport and airline safety and 71% agree the security balance is about right. Of note, however, 17% of those that flew in the last 3 months disagree that the screening balance is right.
- 91% of those who travelled in a premium cabin on their last flight have confidence in safety and security, higher than UK consumers overall.
- Those who experienced what they perceive to be disruption on the last flight are more likely than average to disagree that the security screening balance is right (19%), while those who experienced no disruption are more likely to agree than overall (76%).
- PRM (72%) are less likely than non-PRM (79%) to have confidence in the safety of UK airlines and airports. However, in-line with the general consumer trend, PRM who have flown in the past 12 months are more likely than average to agree (86%).
- Looking more specifically at this group, PRM who need assistance when flying are more likely than average to disagree (9%), and this is even more pronounced when this group has a non-physical disability (16%). Similarly, PRM (55%) are less likely to agree that the security screening balance is right than non-PRM (65%). Disagreement is higher than for UK consumers overall among PRM who have a non-physical disability (18%), have a hidden disability (17%) or would have difficulty when flying (17%).
- High earners are most likely to have confidence in safety and security (81% of those earning between £40,000 and £74,999 and 82% over £75,000. 80% of those aged 65 and over also agree.

Flying behaviour

Cabin class

Disruption

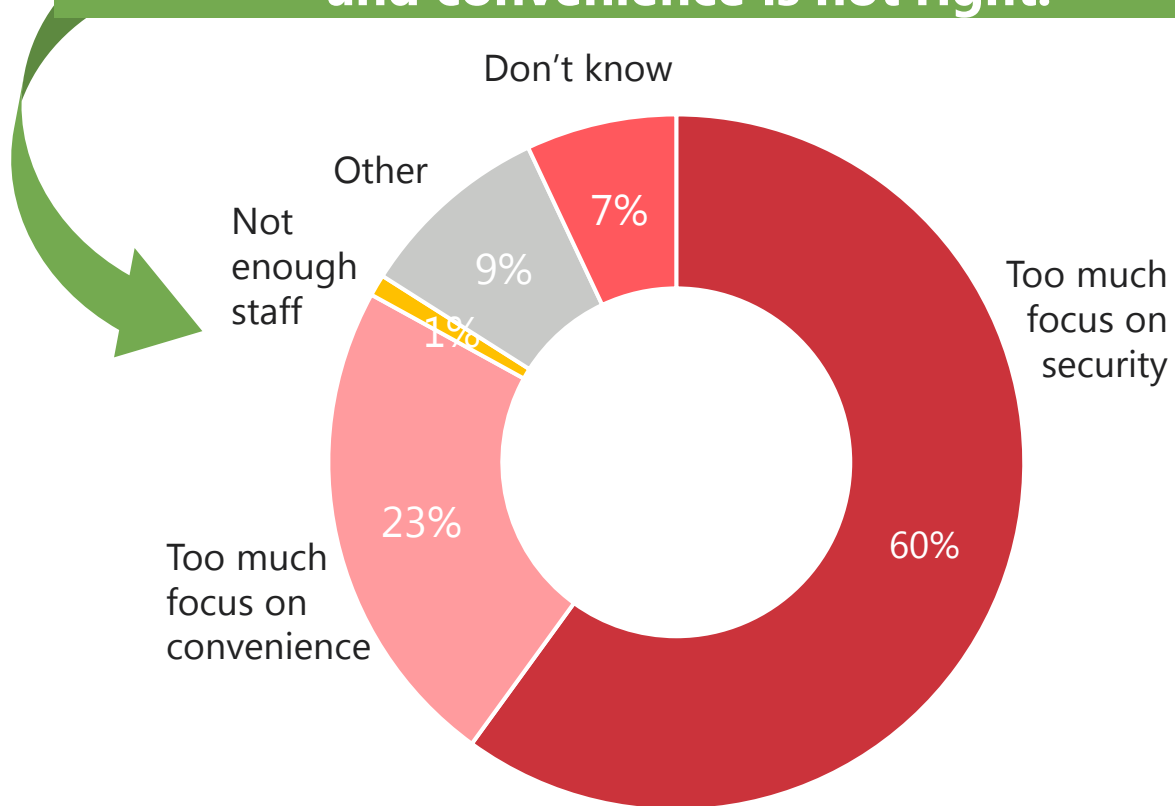
PRM

Demographics

Imbalance between security screening and convenience

For those who believe there is an imbalance in security screening, this is nearly three times as likely to be blamed on too much focus on security rather than too much focus on convenience.

13% Think the balance between security and convenience is not right.

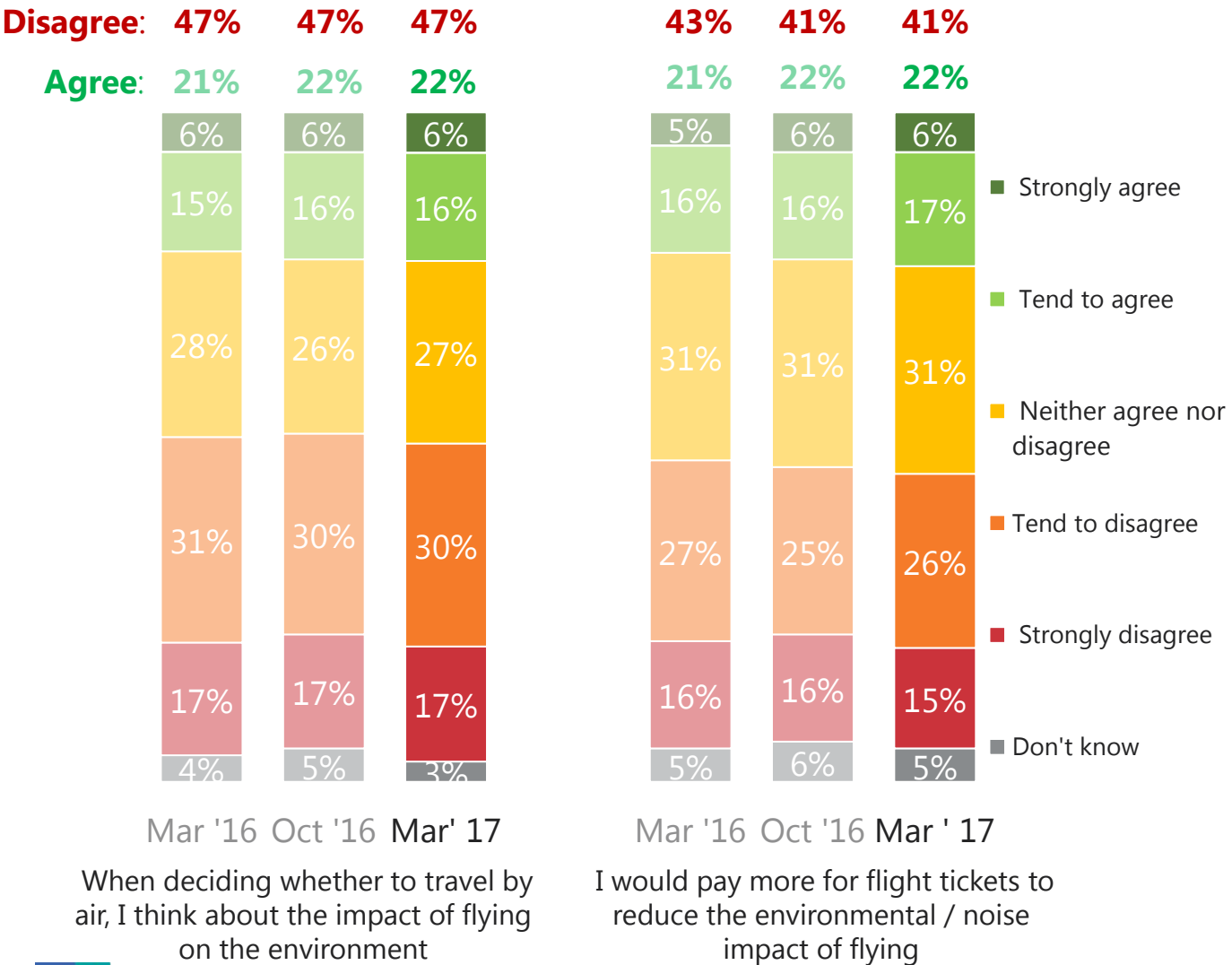


Of those who felt the balance between security and convenience requires improvement...

- From a prompted list of reasons, the main reason given for the balance between security and convenience not being right is that too much focus is put on security. This is more likely to be said by recent flyers (68% of those who have flown in the last 12 months) than non-recent flyers (only 52% who have ever flown but not in the last 12 months).
- Frequent flyers within the past 12 months tend to believe there is too much focus on security screening: 69% of those who have flown 4+ times, 72% of those who have flown 2-3 times, compared to only 60% of those who have flown once in the past 12 months.
- There is no real difference in opinion between PRM and non-PRM, although PRM with a physical difficulty think too much focus is put on security (73% of those who believe the balance between security and convenience is not right).
- As reported last wave, men are more likely to say there is too much focus on security, 67% vs 50% of women. No marked differences are found by age.

Headline Measures: Environment

The environment is not a factor for most people when they think about flying to a destination, and two fifths would not be willing to pay more to reduce the environmental impact of flying.



- As found in previous survey waves, younger consumers show greater concern for the environment, with 25% of 18-34s agreeing that they think about the impact of flying on the environment, compared to 16% of over 65. These age groups also claim they are willing to pay more, with 27% of those age 18-34 agreeing that they would pay more, compared to 18% of the older age group.
- Whilst there was no difference in consideration about the impact of flying on the environment between those last flying for business vs leisure reasons, those flying for business purposes claim they would be willing to pay more to reduce the environmental impact (29% vs 24% of recent leisure/non-business flyers).
- As found last wave, those flying Emirates are more likely than average to agree that they think about the environment and are willing to pay more for their ticket (37% and 34% respectively).
- UK consumers flying without children on their last flight are more likely to disagree with both statements; 54% and 45% respectively.
- Interestingly, and as found last wave, those in the higher household income brackets are more likely to disagree that they think about the environment; with 54% of those in households earning £40,000 or more disagreeing.

- Age
- Purpose
- Airline
- Children
- Income

Flying behaviour



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