

Civil Aviation Authority

Consumer Tracker for the Aviation Sector

Wave Four, DRAFT Report: October 2017

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Ipsos Loyalty

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Background to the research

This is the fourth 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 attitudes towards experiences of disruption when flying and the handling of any subsequent complaints

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 3,504 interviews were conducted with a nationally representative sample between 13th September and 6th October 2017. 3,002 interviews were conducted online and 502 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 third wave (March 2017). △ ▽ Hollow arrows indicate a year-on-year significant difference, between October 2016 and October 2017.
- Alternate arrows show a results that is significantly higher ▲ or lower ▼ than a specified subgroup.

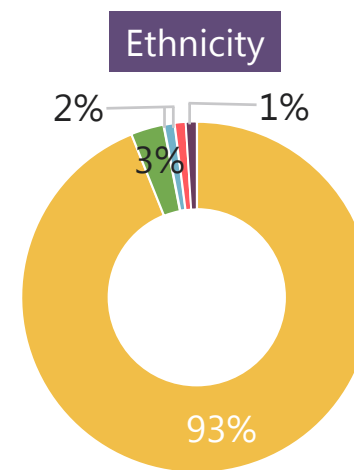
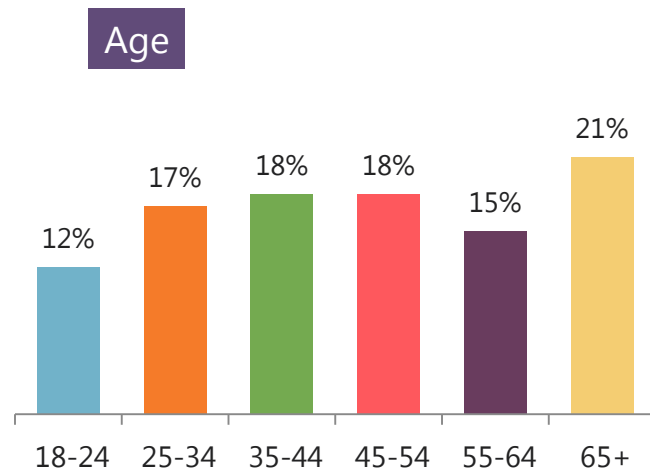
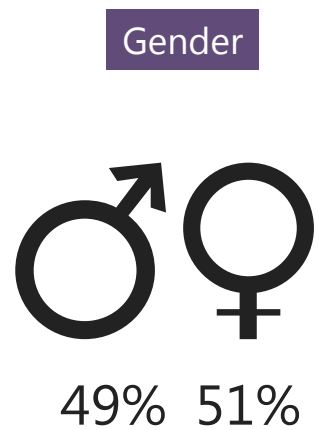
Weighting scheme

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%	10%
	25 – 34	17%	17%
	35 – 44	18%	18%
	45 – 54	18%	18%
	55 – 64	15%	16%
	65 +	21%	21%
Working status	Working Full Time	41%	43%
	Working Part Time	17%	15%
	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%	7%
	West Midlands	9%	9%
	London	13%	13%
	South East	14%	13%
	Eastern	9%	9%
	South West	8%	8%
	Wales	5%	5%
	Scotland	8%	9%
	Northern Ireland	3%	3%

Demographic (weighted) sample profile



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



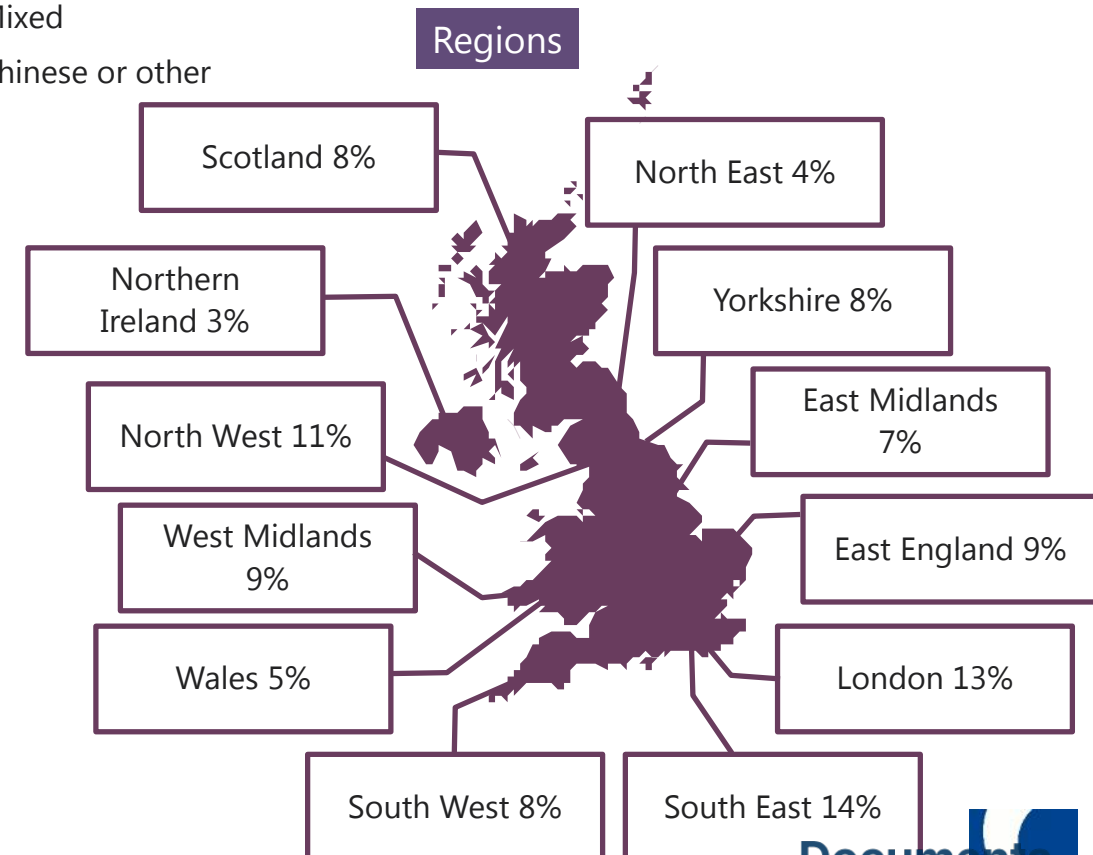
91% of those interviewed by phone have internet access

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	22%
Housewife/househusband	7%
Student/full time education	4%

Household Income

Up to £14,999	14%
£15,000-24,499	17%
£25,000-39,999	24%
£40,000-74,999	22%
£75,000 or more	8%



Executive Summary



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Executive summary: Headlines

Overall patterns of air travel remain consistent with previous waves of this research. 53% have flown in the past year and 6% have never flown. Almost nine in ten (88%) flights are for holiday purposes. The biggest barrier to flying remains budgets and the cost of flying, as cited by 42% of those who did not fly in the past 12 months.

Enjoyment

Whilst over half continue to enjoy travelling by air, this proportion has fallen slightly over the past two years. That said, nearly a quarter (23%) strongly agree, although a fifth (20%) disagree. PRM are less likely to enjoy flying than non-PRM (46% vs 55%), and PRM with non-physical disabilities are even less likely to agree (39%).

Security & Safety

Confidence in the safety of UK airlines and airports continues to be the highest rated headline measure. Despite a small dip this wave, three-quarters (74%) are confident. Agreement that the balance between security screening and convenience is about right is the second highest rated headline measure. 62% agree it is about right, while 13% disagree. Disagreement tends to be because of a perceived over-emphasis on security screening at the expense of convenience (58% of those that disagree that the balance is right).

Consumer Confidence

Confidence that consumers will get the service they have paid for when flying has dipped this wave (57% agree and 13% disagree). There has also been a drop in confidence of fair treatment in the event something goes wrong (44% agree and 21% disagree). Disagreement with these statements increase when consumers experienced disruption on their recent flight (21% and 28% disagree, respectively).

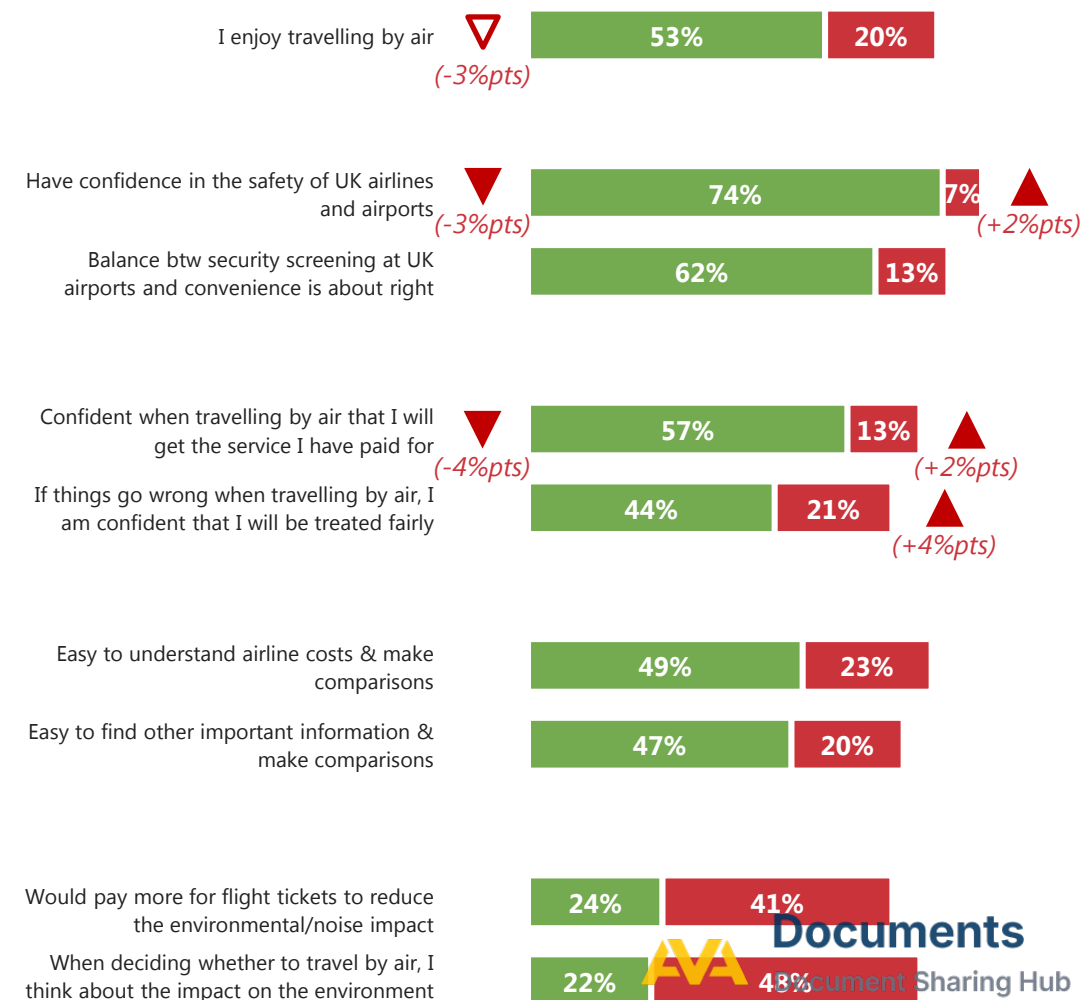
Consumer Choice

Around half of UK consumers continue to agree that it is easy to understand and make price comparisons. Small increases in those disagreeing in March 2017 have continued into this wave of the research.

Environment

Environmental concerns remain the lowest rated headline measures and are unchanged from previous waves. 22% think about the impact on the environment when flying but 48% disagree. 24% would pay more to reduce the environmental impact, with 41% disagreeing.

Satisfied ■ Dissatisfied ■



Documents

AVA

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Executive summary: Travel experience

Experience of the most recent flight is generally very positive with 86% satisfied overall. Pre-flight planning, booking and travel to the airport is rated highly, along with information provision at the airport. There have, however, been some decreases in satisfaction with some airport touchpoints and with satisfaction with the airport experience overall.

Overall

- Overall satisfaction with the most recent travel experience is very high at 86% satisfied, though this represents a fall since Spring 2016, where 90% were satisfied.
- Satisfaction across touchpoints is broadly consistent with last wave, albeit with a few small but significant downward shifts in satisfaction.

Before flying

- Deciding which flight to book (86%) and the booking process itself (89%) continues to be very highly rated, although there remains some dissatisfaction with the choice of airlines and departure airports, particularly in some regions.

Airport Experience

- The airport experience overall is highly rated, with 78% satisfied, though this represents a year on year fall. The drop may be influenced by declines in airport experience touchpoints for baggage collection, passport/immigration control and shops, restaurants and services.

	Satis- fied	Dis- satis- fied
Process of booking the flight	89%	3%
Finding way to gate	88%	3%
Ease of finding way around airport in UK	87%	3%
Deciding which flight to book	86%	3%
Travelling to/from airport in UK	85%	5%
Information about flight status at the UK airport	84%	6%
Security at the airport in the UK	84%	6%
Check-in and bag drop at airport in the UK	81%	7%
Ease of finding information to compare choices	79%	4%
Baggage collection at the airport in the UK	79%	9%
Passport/immigration control in the UK	79%	10%
Overall airport experience	78%	10%
Overall on-board and in-flight experience	76%	8%
Transfer/connection to another flight	75%	6%
Shop, restaurants & services at UK airport	75%	9%
Value for money	74%	9%
Amount of choice btw UK departure airports	67%	13%
Amount of choice between airlines	64%	13%
Handling of any complaints	53%	16%

Executive summary: Disruption & complaint handling

Disruption

- Close to half (45%) of recent flyers experienced what they perceive to be disruption on their last flight. The most common types of disruption experienced are long queues or crowding in the airport (19%), a flight delay of up to two hours and a delay taking off after boarding the aircraft (both 13%). Dissatisfaction with the way disruption is handled is high. Flyers that have experienced disruption are more likely to be negative about flying across a number of measures in the survey.

Complaint handling

- Satisfaction with complaint handling is also low, most notably for speed of response (44% dissatisfied), redress offered (44% dissatisfied) and being kept informed about the progress of complaints (46% dissatisfied).
- Negative perceptions of the time and effort it would take to complain prevent many potential complainants from either making a complaint or escalating an existing complaint to a third party.

Executive summary: PRM experience

Flying behaviour

- PRM are almost half as likely to have flown in the past year than non-PRM (30% compared to 59%) and twice as likely to have never flown (10% vs 5%).

Barriers

- The most commonly cited barrier to flying for PRM is budget/cost considerations (40%, similar to non-PRM at 43%). Over a third (36%) mention the difficulties that their health condition or disability would cause at airports or while flying.

Special assistance

- Half of PRM (51%) are at least generally aware about the special assistance available, and this increases to three-quarters (75%) of those that have flown in the past 12 months. When assistance is requested, satisfaction is high, with 83% satisfied.

Headline measures

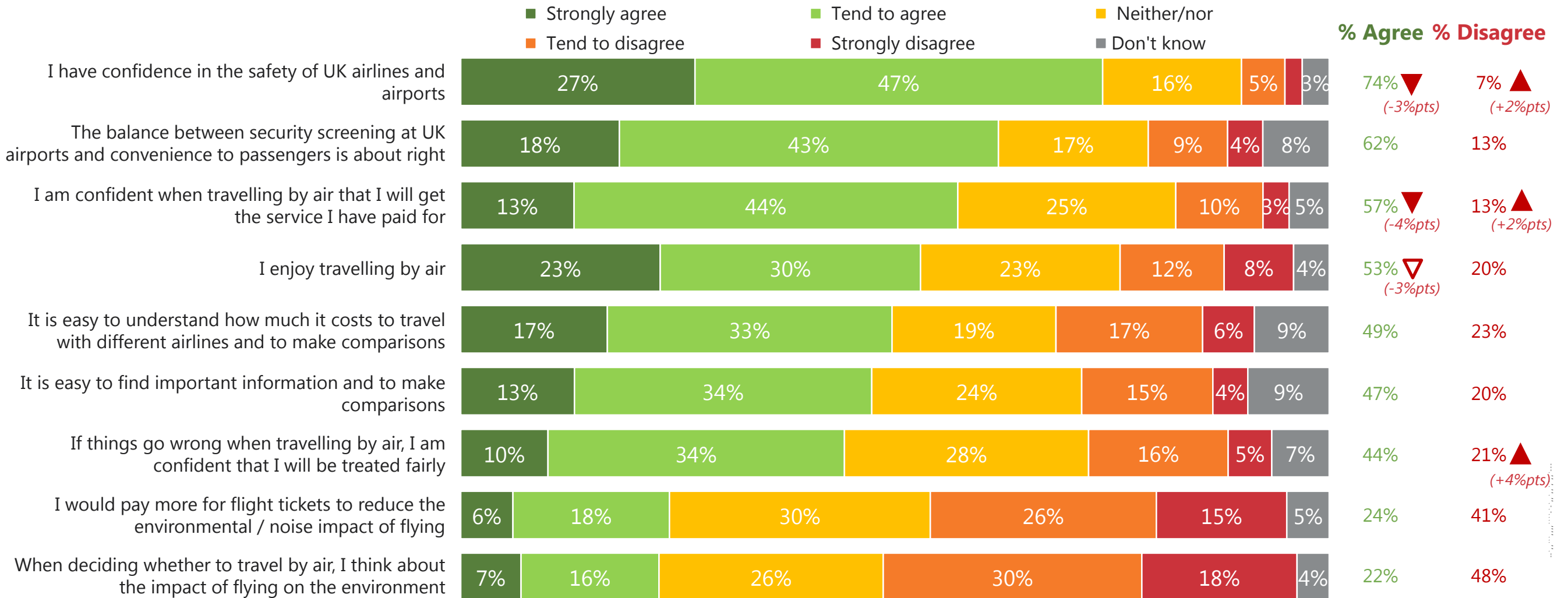


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Headline Measures: Overall

Three quarters of UK consumers continue to be confident in the safety of UK airlines and airports, however there have been small but significant shifts lessening the strength of this opinion. There are also small decreases in fair treatment and getting what's been paid for.

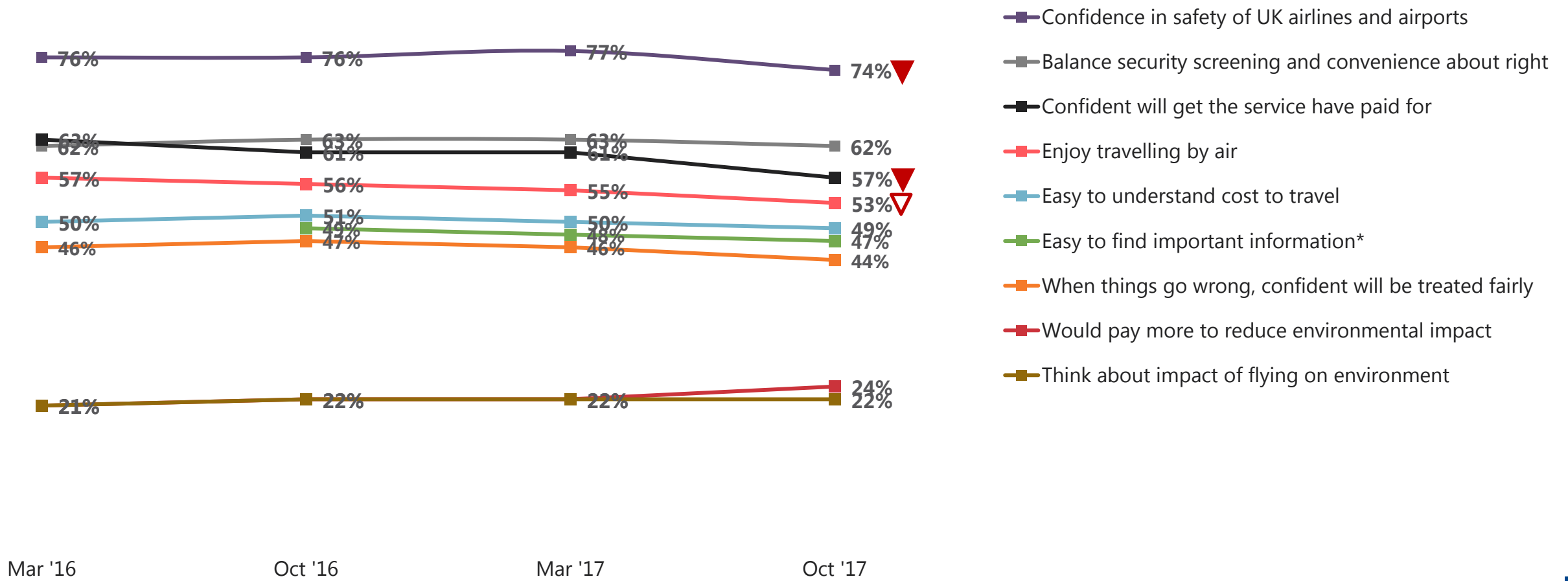


Headline Measures: Trend

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

Since March 2016 there has been a 6%pt decrease in the proportion confident that they will get the service they have paid for.

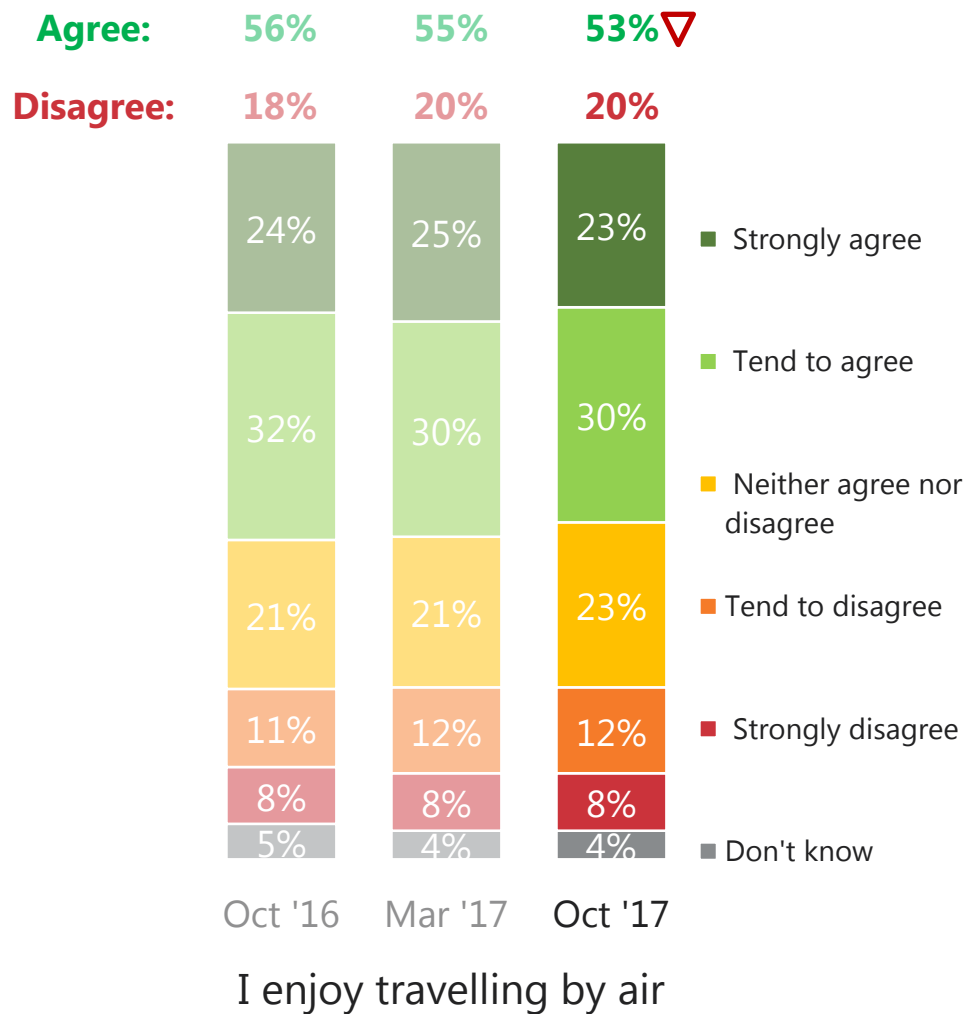
% Agree



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 (350.1)
* Statement wording changed for Oct '16, hence no data shown for March '16.

Headline Measures: Overall

Although the proportion of UK consumers who enjoy travelling by air has fallen slightly, more than half continue to enjoy travelling by air.

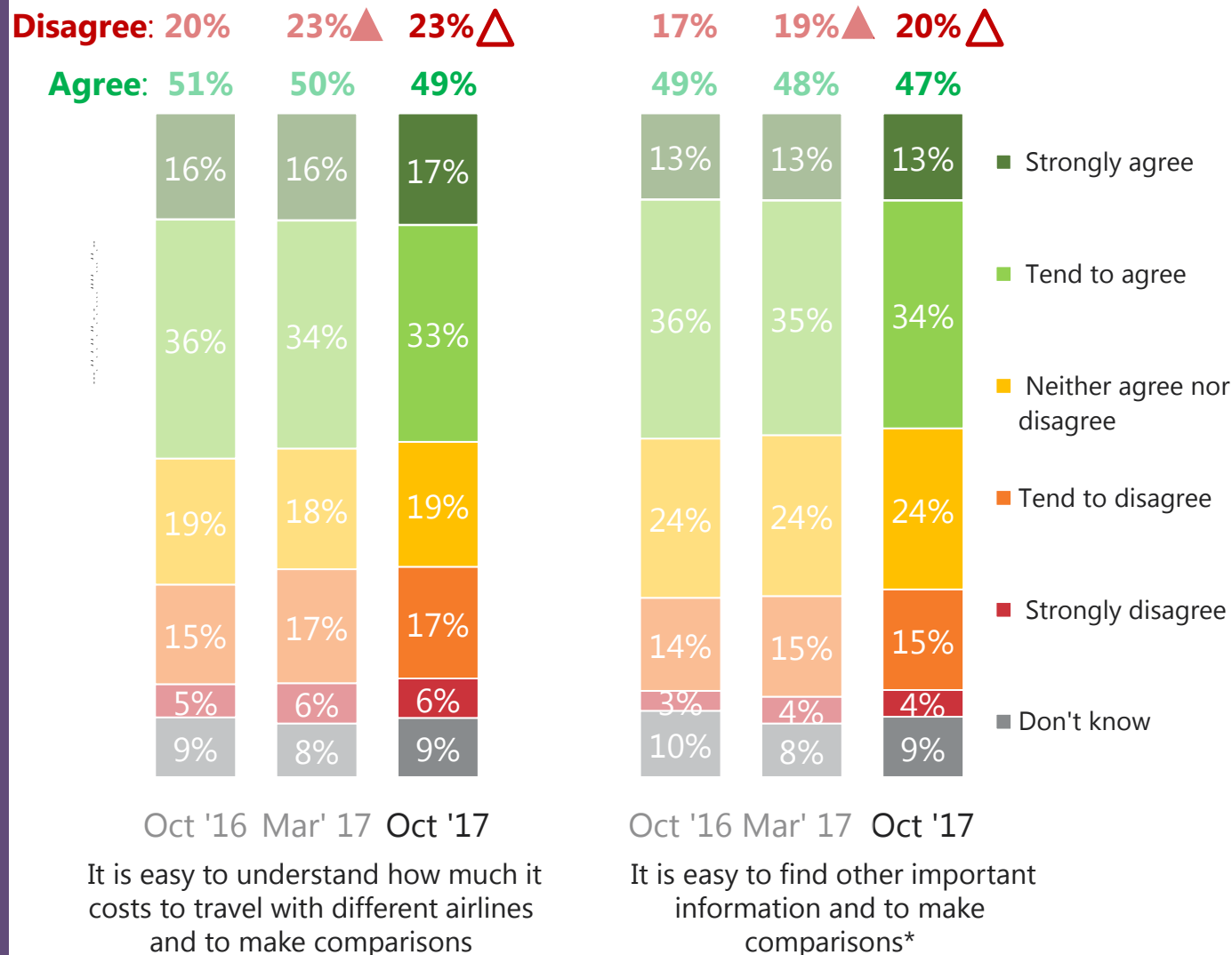


- The more recently someone has flown, the more likely they are to say that they enjoy flying (64% of those that flew in the last 3 months agree that they enjoy flying, compared to 57% of those who last flew in the past 1-3 years, 48% of those who last flew 4-10 years ago, and 37% of those who last flew 10+ years ago). Those who flew 4-10 years ago and 10+ years ago are more likely than average to disagree (24% and 28%, respectively). 67% of those who have flown 4 or more times in the past year enjoy flying.
- Those who last flew Premium Economy are also more likely to enjoy flying (71%).
- PRM are less likely than non-PRM enjoy flying (46% of PRM agree compared to 55% of non-PRM) and more likely to disagree (24% vs 19%). This is a particular issue for PRM with non-physical disabilities, 39% of whom agree that they enjoy flying and 27% disagree. PRM who do not need assistance when flying are the PRM subgroup most likely to disagree that they enjoy flying (29%, with 41% agreeing), suggesting improvements in helping PRM outside of formal assistance may be needed.
- Recent flyers who used assistance and had requested it on a previous flight are more likely to enjoy flying (75%) than recent flyers who did not need assistance (62%).
- Those who experienced disruption on their most recent flight are more likely to disagree that they enjoy flying (22%) than those who did not (15%), but there are no major differences in the likelihood of agreeing that they enjoy flying (60% and 63%, respectively).
- Men are more likely to enjoy flying than women (56% vs 50% agree and 17% vs 23% disagree). 57% of those aged 18-34 enjoy flying compared to an average of 52% for those aged 35 and above. Those on higher incomes also enjoy flying more (60% of those earning £75,000+ per year and 56% of those earning £40,000-£74,999, compared to 48% of those earning less than £15,000 per year).

- Flying behaviour
- Cabin class
- PRM
- Assistance
- Disruption
- 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 stands at almost a quarter and almost a fifth, respectively.



- The more recently UK consumers have flown, the more likely they are say it is easy to make cost and other comparisons when booking flights, with 62% of those who have flown in the last 3 months agreeing it is easy to compare costs, whereas only 26% of those who last flew 10 or more years ago agree. Those who have flown 4 or more times in the past year are even more likely to agree it is easy to understand cost (68%) and other (64%) comparisons. Those flying for business purposes are also more likely to agree than those flying for non-business purposes (67% vs 60% for cost comparisons and 66% vs 58% for other comparisons).
- Recent flyers who last booked online are also more likely than average to agree with these statements (62% that it is easy to compare prices between airlines and 60% for other important information).
- PRM are less likely than non-PRM to feel it is easy to make cost comparisons when booking flights (43% vs 51%) and this falls further for PRM with non-physical disabilities and needing assistance (32%), those with hidden disabilities who need assistance (34%) and those who haven't taken a flight in the last 12 months (36%). A similar picture is also true for perceptions of ease of making other flight comparisons (39% of non-PRM compared to 49% of PRM, 25% of PRM with non-physical disabilities who need assistance and 28% of PRM with hidden disabilities who need assistance).
- Younger UK consumers are more likely to say it is easy to compare costs and other information than older generations. Those with higher household incomes are also more likely to agree with both statements than those with lower household incomes.

Flying behaviour

Booking method

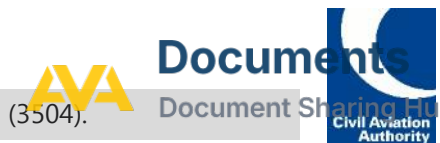
PRM

Demogs



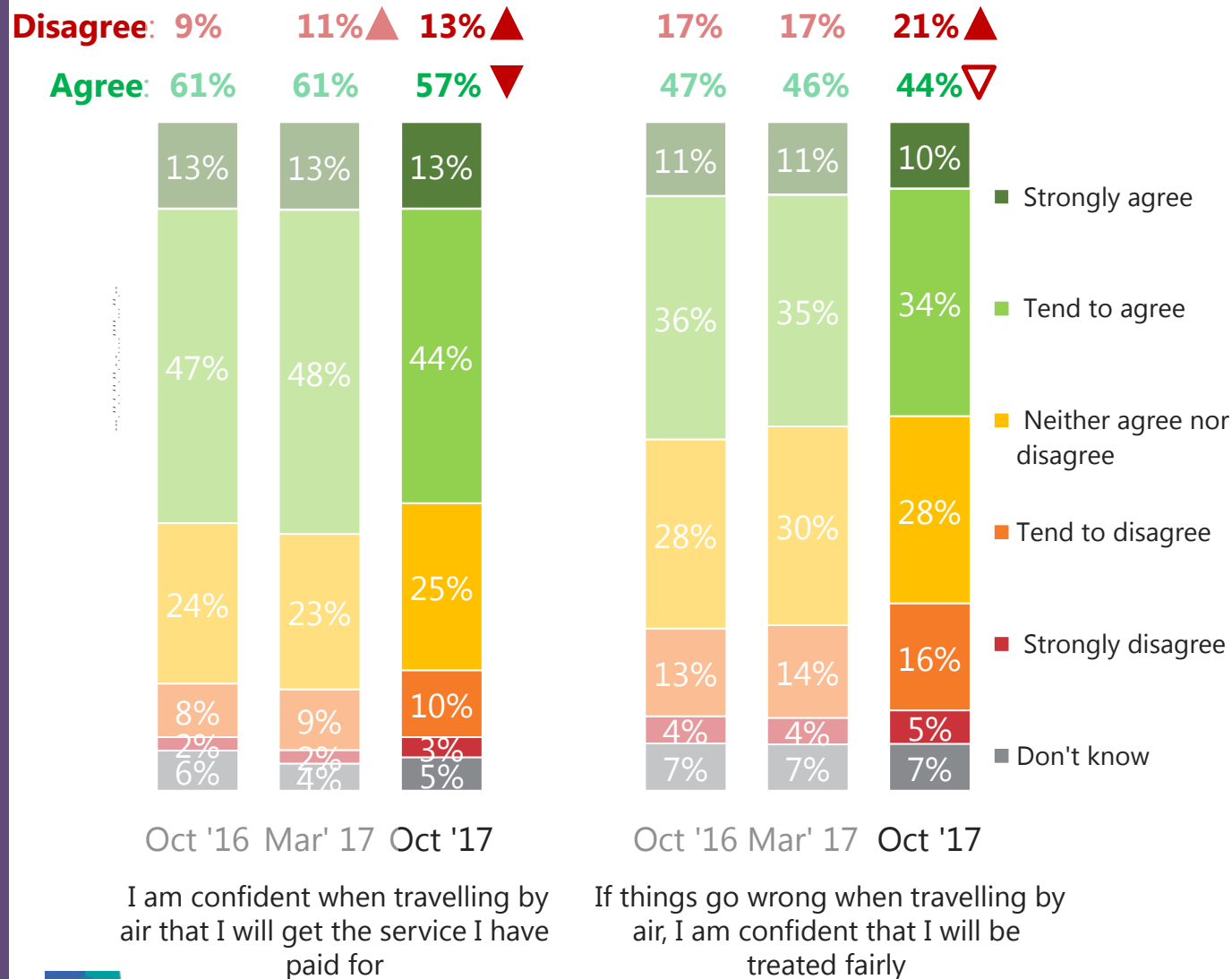
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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3504).



Headline Measures: Consumer Confidence

Confidence in getting the service that has been paid for has decreased since Spring 2017, although 57% remain confident. While 44% are confident they will be treated fairly, over a fifth are not (21%), a significant increase from March 2017.



- 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 (63%) and that they will be treated fairly (47%) if things go wrong. Although the level of agreement among those who have flown four or more times in the past 12 months is similar, this group has a more polarised view, with greater disagreement (16% and 26% respectively).
- Disruption on the last flight has an impact on opinion and leads to higher disagreement levels. 21% of those who experienced disruption disagree that they will get what they paid for, and 28% do not believe that they will be treated fairly.
- When the last flight was for leisure purposes, recent flyers are more likely than average to agree that they will get what they've paid for (66%) or that they will be treated fairly (49%).
- PRM (50%) are less likely to agree that they will get what they paid for than non-PRM (59%), and this further decreases among PRM with physical conditions (47%) and those needing assistance (42%). PRM are less likely than non-PRM to feel they would be treated fairly if things go wrong (41% vs 45%), decreasing to 34% among PRM with hidden disabilities requiring assistance.
- Recent flyers who booked face to face are more likely to be confident they will get the service they paid for (76%) than those booking online (65%) or by telephone (64%).

Flying behaviour

Disruption

Flight purpose

PRM

Booking channel



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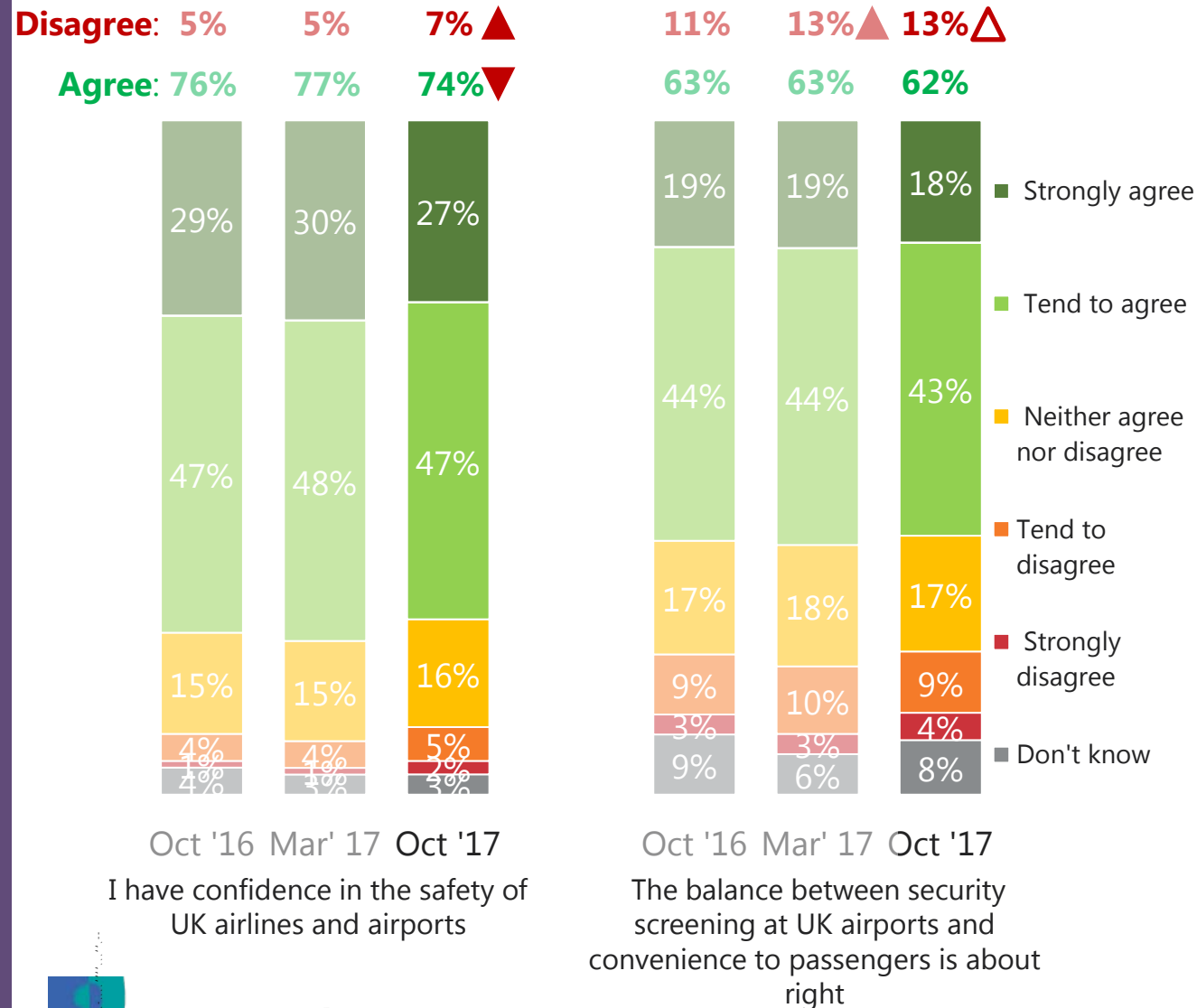
Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3504)



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Headline Measures: Security and Safety

Confidence in the safety of UK airlines and airports is the highest rated headline measure, although there has been a drop in agreement and an increase in disagreement, both significant.



- Recent flyers who have flown in the last 12 months are more likely than average to have confidence in UK airport and airline safety and security (82%) and more frequent flyers are particular confident, with 86% of those who have flown 4+ times in the past year agreeing. Only 34% of those who have never flown agree. When considering the balance between security and convenience, recent fliers are more likely to agree that it's about right (71%).
- 83% of those who travelled in Economy or Premium Economy cabin agree they have confidence in UK airport and airline safety and security, higher than UK consumers overall. Those who travelled in Premium Economy (78%) are more likely to say the security screening and convenience balance is about right than those travelling in other classes.
- Those who experienced disruption on their last flight (17%) are more likely than those who didn't (11%) to disagree that the security screening balance is right.
- PRM have less confidence in the safety and security of UK airlines and airports than non-PRM (66% vs 76%) and are also less likely to say the balance between security and convenience is about right (53% vs 65%). PRM with non-physical disabilities are less likely than PRM to agree with both statements (57% and 47%, respectively).
- 78% of those age 18-24 and 65+ have confidence in the safety and security of UK airports and airlines, higher than the 70% of those age 35-54 who say the same. High earners are most likely to have confidence in safety and security (80% of those earning between £40,000 and £74,999 and 82% over £75,000).
- Women are more likely than men to agree that the balance between convenience and security is about right (64% vs 60%). 18-24 year olds are also more likely to agree on average (69%), as are high earners (68% of those earning £40,000-£75,000 and 69% of those earning £75,000+).

Flying behaviour

Cabin class

Disruption

PRM

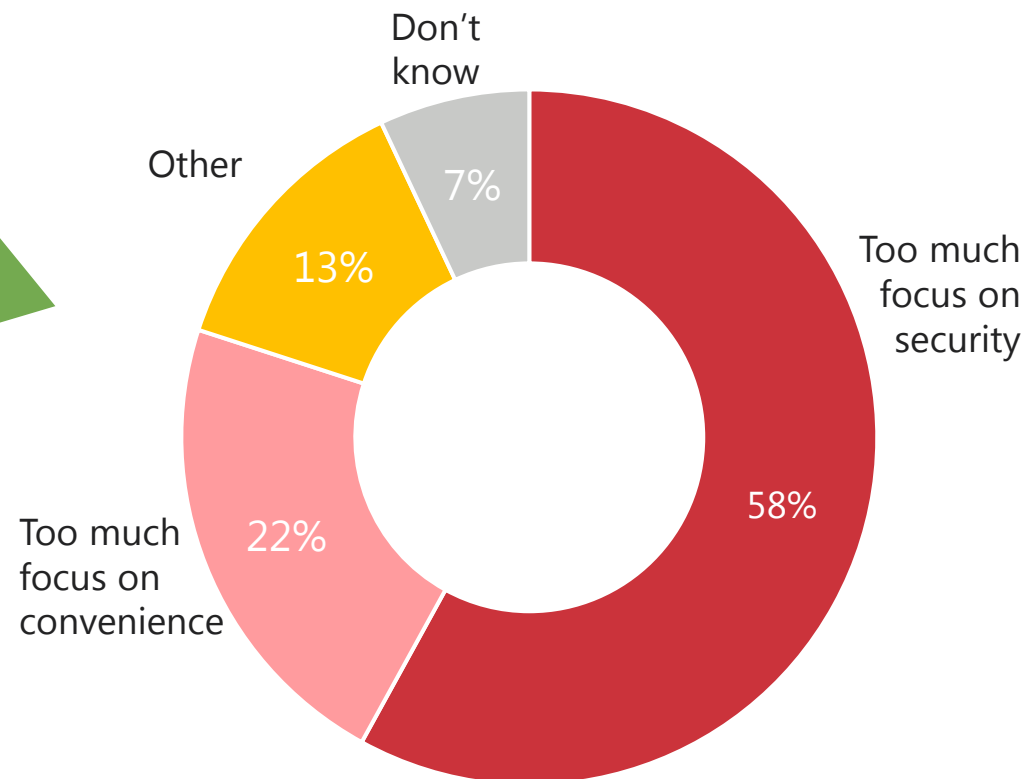
Demographics

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 (3504)

Imbalance between security screening and convenience

Among those who believe that the balance between security and convenience is not right, there is a tendency to believe that there is Too much focus on security rather than convenience.

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

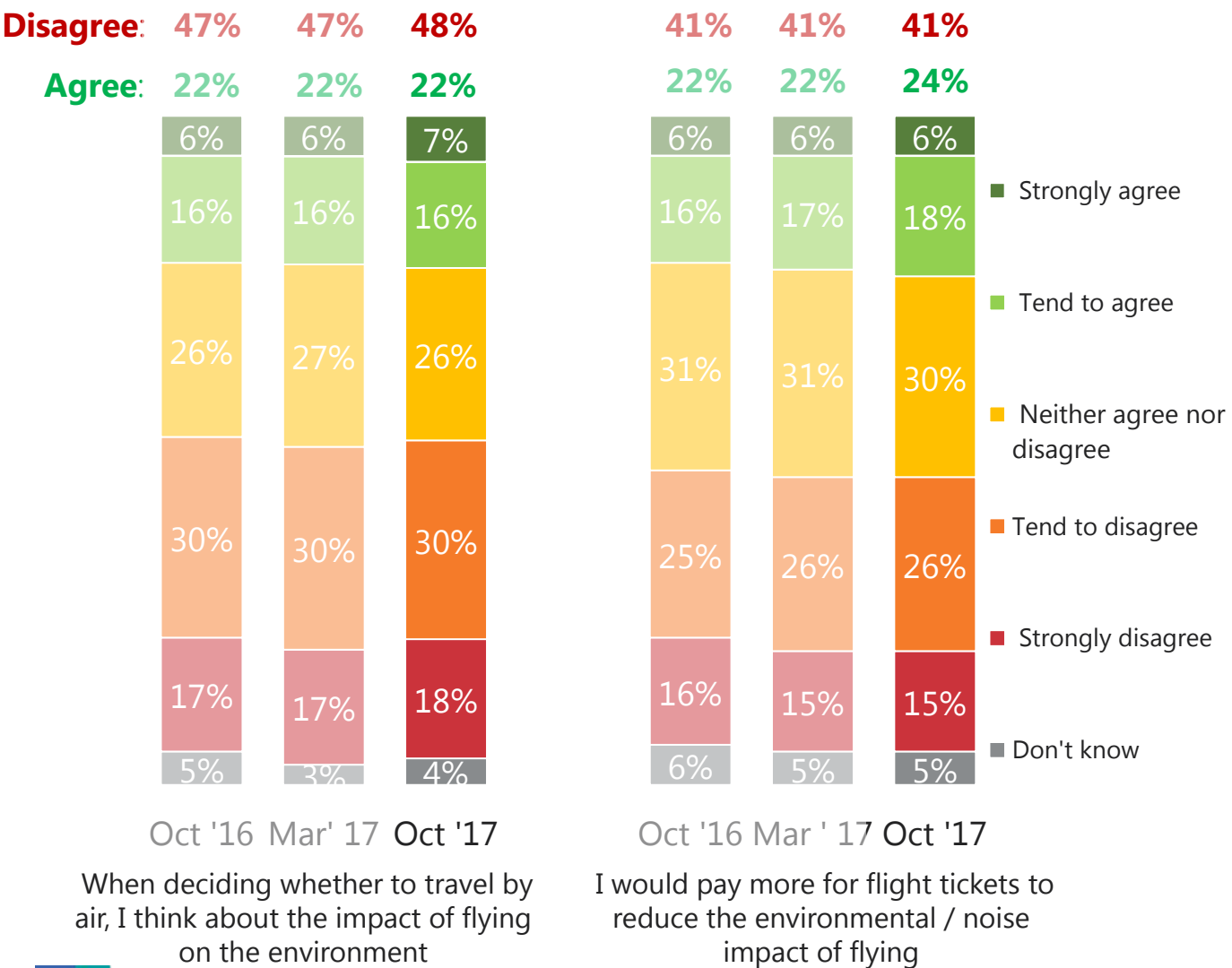


Of those who felt the balance between security and convenience requires improvement...

- More frequent flyers are more likely to believe that the balance is tilted too much towards security. 70% of those who have flown four or more times in the last year believe that there is too much focus on security.
- Male travellers are more likely to state that there is too much focus on security, with 65% of men stating that the balance focuses too much on security. Female travellers are the opposite, with 29% stating that there is too much focus on convenience.
- Travellers aged 18-24 who believe that the balance is not right are more likely than others to believe that there is too much focus on convenience, with 39% of this age group stating that they believe this is prioritised.

Headline Measures: Environment

The lowest rated headline measure, just over a fifth agree they think about the environmental impact when travelling by air, while almost half do not. Just a quarter would pay more for flight tickets to reduce the environmental impact.



- Young people age 18-34 are more likely than those age 35 and over to say they would pay more for flight tickets to reduce the environmental impact of flying (29% agree, compared to 22% among those over 35). However, even among this group, a higher proportion disagree than agree (39%).
- Those who have flown 4 or more times in the past 12 months (58%) are more likely than UK consumers overall to disagree that they think about the environmental impact when flying, though they are no more or less likely to agree. There is greater agreement and disagreement among those who have flown in the past 12 months compared UK consumers on average that they would pay more to reduce the environmental impact of flying (26% and 44%, respectively).
- Those travelling for business purposes in the last 12 months are more likely to agree they think about the environmental impact when flying (27% vs 22% among those who have travelled for non-business purposes), although almost half (46%) of this group disagree. This group is also more likely than those who have travelled for non-business purposes in the last 12 months to say they would pay more to reduce the environmental impact of flying (34% vs 26%).
- Those who travelled in Premium Economy on their last flight are more likely than average to say they think about the environmental impact of flying (30%), and that they would pay more to reduce this impact (34%).
- Non-PRM are more likely to disagree (42%) than PRM (36%) that they would pay more to reduce the environmental impact of flying, though there is no difference in the level of agreement.

Age

Flying behaviour

Purpose

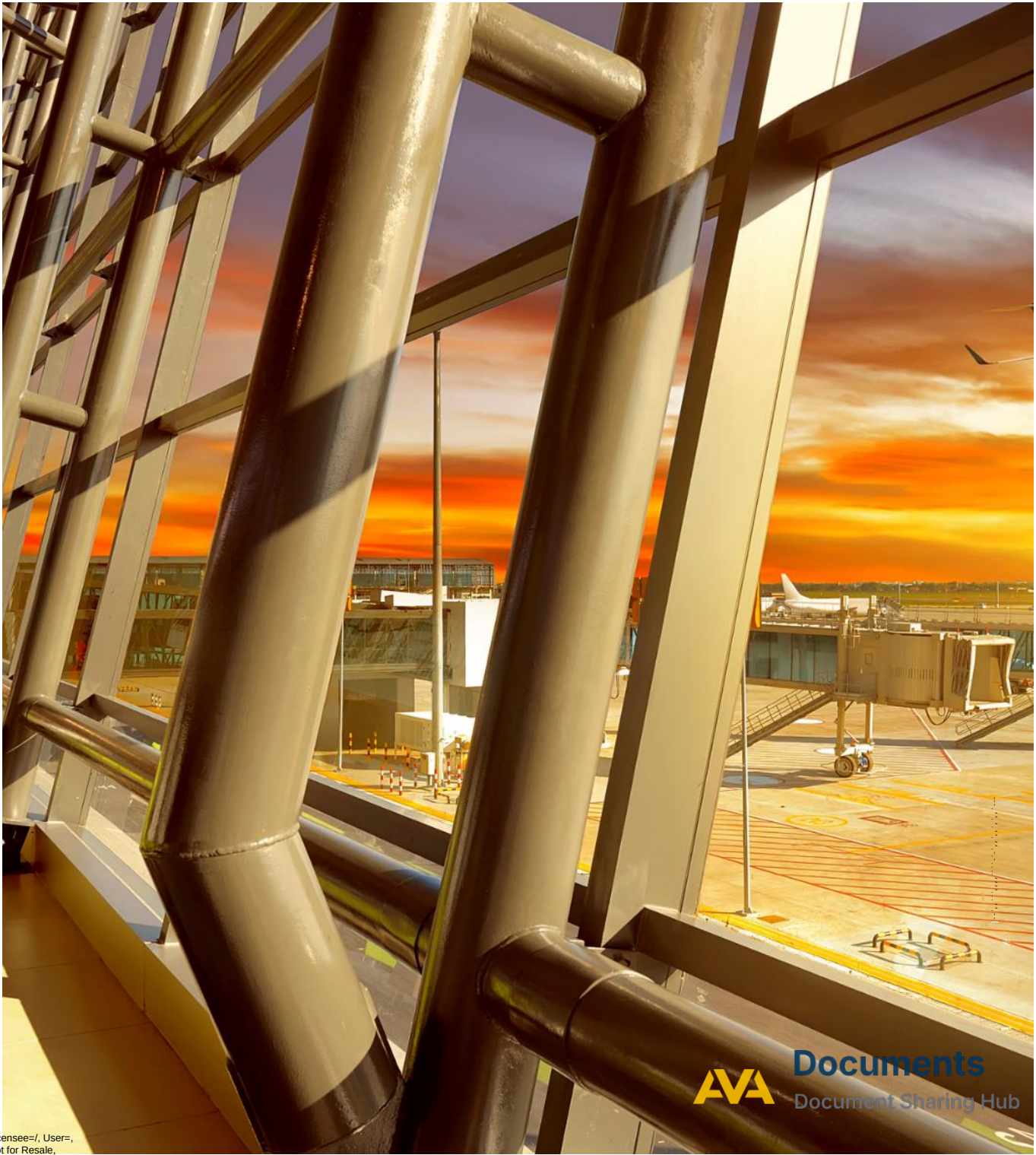
Cabin

PRM

Flying behaviour



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Flying behaviour - Summary

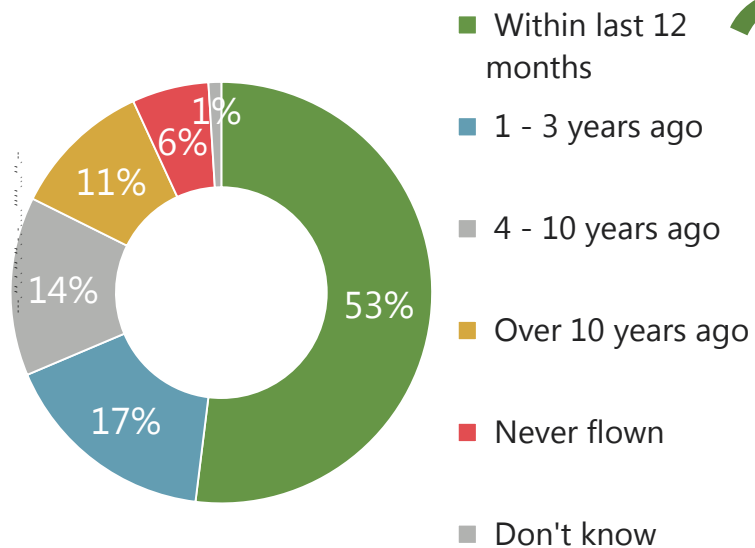
Most people in the UK have flown in the past, and over half have flown in the past 12 months. Most experience of flying is when travelling on holiday. continues to be the biggest barrier to flying.

- **The majority of the UK population have experience of flying, and around half (53%) are recent flyers, having flown in the last 12 months.**
 - Just over one third (35%) of recent flyers have only taken a flight once in the last year. A similar proportion (33%) have flown two or three times in the same time period.
 - A small cluster of recent flyers (22%) travel by air four or more times a year. This equates to about one in ten of the overall population who fly particularly frequently.
 - Most recent flyers believe that their flying habits will be stable over the next twelve months, with the three in five (60%) stating that they'll fly the same amount. There are small minorities who believe the number of flights they will take will increase (19%) and decrease (13%).
 - The majority of recent flyers have flown to go on holiday in the last twelve months, with nine out of ten (88%) having taken flights as part of their holiday. The second largest reason for flying is visiting friends or relatives (29%), whilst 12% fly for business or reasons relating to work.
- **Budgetary concerns remain the largest barrier to flying.**
 - Among those who have not flown in the last year, budget constraints are the leading factor. In line with previous waves, two in five (42%) non-recent flyers cite this as a reason they have not flown in the last year. Three in ten (29%) have not made any trips where flying would be an option.
 - There are small but significant changes in the proportion of non-recent flyers who mention pregnancy, children or age, and not having time to travel within the UK or abroad. Mentions of pregnancy, children and age increase, with 7% of non-recent flyers mentioning these specifically as barriers. Not having time is mentioned by 6%, a small decrease.
 - Health and disability issues are mentioned by more than one in ten (12%) non-recent flyers,

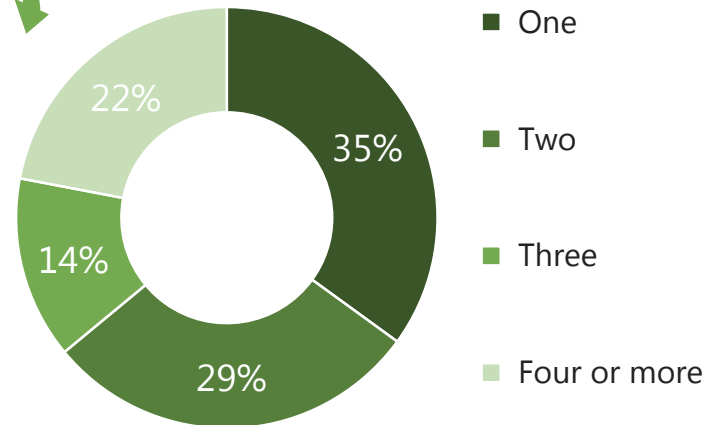
Flying behaviour: A general overview

Flying behaviour has been consistent over time, with just over half of UK consumers flying in the last year. A fifth of these have flown four or more times in that period. Holiday continues to be the most common flight purpose.

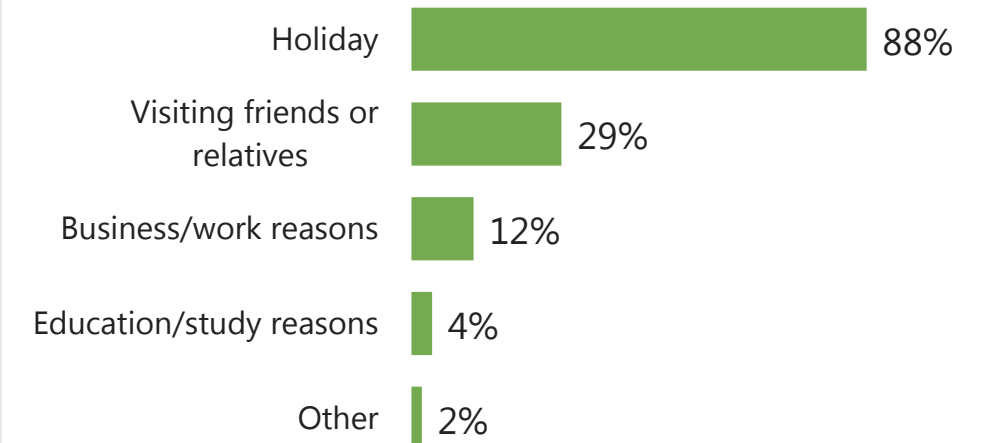
Last flight from a UK airport



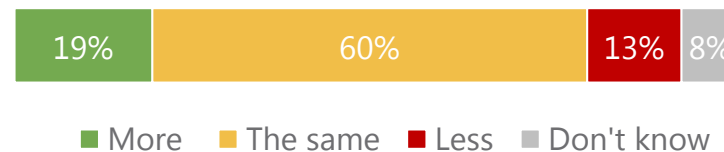
Number of flights in the last 12 months



Purpose of flights in the last 12 months



Anticipated changes in the next 12 months



Q10. When was the last time you flew from a UK airport? Base: All participants (3504) | Q11. How many trips by air have you made in the last 12 months? Base: All participants who flew in last 12 months (1865) | Q12. For which of these reasons have you made flights in the last 12 months? Base: All who have flown in the last 12 months (1862) | Q13. In the next 12 months, do you expect that you will fly more, the same amount or less compared to now? Base: All participants (3504)

Flight and accommodation booking

Roughly equal proportions booked flights and accommodation together, booked separately, and only booked flights. For those booking flights and accommodation together, there has been an increase in the proportion booking through a UK based company.

