

Air passenger experience: Results from CAA survey module (2009)

1. Introduction

- 1.1 This report summarises findings from a set of questions on air passengers' experiences at seven UK airports in 2009. This survey module was sponsored by the DfT and was included in the Civil Aviation Authority (CAA) passenger survey.
- 1.2 The report covers passengers' attitudes and experiences in relation to:
 - check-in
 - flight information
 - airport facilities
 - public transport links
 - security screening.
- 1.3 The results are based on responses received from a subsample of passengers at Heathrow, Stansted, Manchester, Gatwick, Luton, Edinburgh and Inverness.
- 1.4 In 2008, this survey module was asked of a subsample of passengers at Heathrow, Stansted, Manchester and Bristol. Where sample sizes permit, results for 2008 and 2009 are compared for the three airports included in both survey years. However, due to the different subset of airports included in the two years, it is not possible to compare the overall results for 2009 with 2008.
- 1.5 Results from the 2008 survey and provisional results from the first two quarters of 2009 (January to June) have been published on the Department's website. The results presented here are the finalised results for the full calendar year of 2009.
- 1.6 The set of questions asked is available in **Annex A**. A detailed set of results for each question, including breakdowns by passenger and flight characteristics is presented in **Annex B**. A list of recent, related publications is given in **Annex C**.

2. Key findings

- 2.1 Overall a large majority of responding passengers were satisfied with their experiences at the seven airports surveyed in 2009.
- 2.2 Around nine out of ten said they were very or fairly satisfied with check-in, flight information, airport facilities and security screening.
- 2.3 At least 87% of respondents at each airport said they were very or fairly satisfied with their experience of security screening. The average time spent queuing for security screening ranged from 2.3 minutes at Inverness to 7.3 at Heathrow.
- 2.4 Among those who checked in at the airport, the average time spent queuing ranged from 2.6 minutes at Inverness to 7.7 minutes at Gatwick. Overall, 71% queued at check-in for 5 minutes or less and 86% for 10 minutes or less.
- 2.5 Among the three airports which were also surveyed in 2008 (Heathrow, Manchester and Stansted), levels of satisfaction had generally improved or stayed about the same in 2009 compared with the previous year. The main exception to this was an increase in the time spent queuing for security screening at Heathrow.

Background to survey

The **Civil Aviation Authority (CAA) Passenger Survey** is undertaken to obtain information about air travellers that cannot be collected on a routine basis from the air transport industry. The survey includes questions on journey purpose, final and intermediate origins/destinations, means of transport to and from airports, route flown, country of residence and income. This information is used by a range of customers, some of them for assessing the type of market served by airports and consequently for forecasting air transport demand and for planning airport facilities.

The CAA uses its own interviewers to conduct the survey and it runs continuously throughout the year at selected UK airports. Only departing passengers are interviewed.

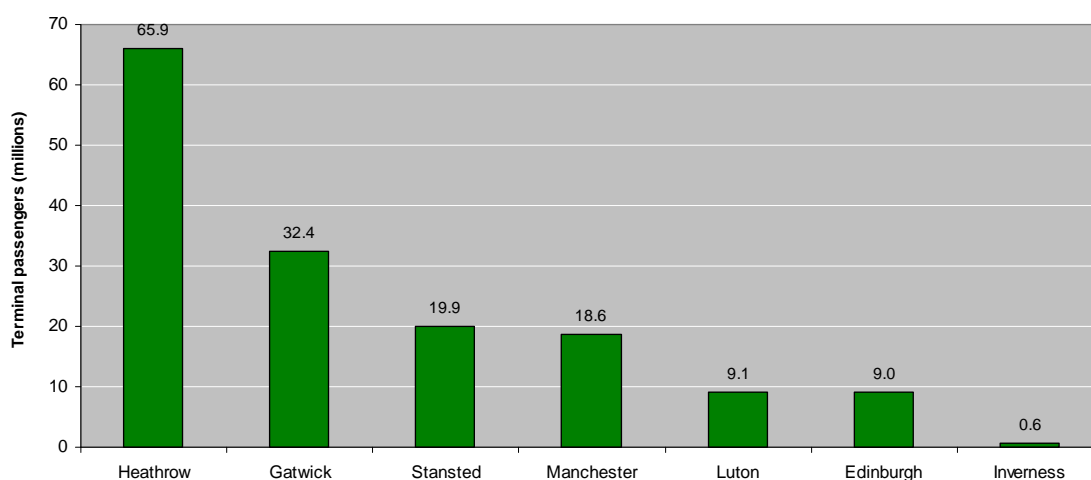
Additional information about the survey can be found at: www.caa.co.uk/surveys

The **Passenger Experience Survey Module** is a set of 11 questions (see Annex A) sponsored by the Department for Transport (DfT) and asked of a sub-sample of the passengers responding to the main CAA survey. During 2009 over 25,000 passengers were asked the survey module questions at seven UK airports: Heathrow, Stansted, Manchester, Gatwick, Luton, Edinburgh and Inverness. In 2008 the survey module was asked at four airports: Heathrow, Stansted, Manchester and Bristol. In 2010 the questions relating to security screening are being asked at Heathrow, Stansted, Manchester and Leeds Bradford.

3. Characteristics of passengers at the surveyed airports

- 3.1 In 2009, a total of 155.6 million passengers used the seven airports surveyed. These seven airports therefore accounted for 71% of the 218.1 million passengers using UK airports in 2009. Figure 1 shows the total number of passengers using each surveyed airport.
- 3.2 Heathrow is the largest UK airport with 5 terminals and 65.9 million passengers in 2009. Gatwick handled the second highest number of passengers in 2009, at 32.4 million, followed by Stansted (19.9 million) and Manchester (18.6 million). Luton and Edinburgh both handled around 9 million passengers while Inverness is much smaller, handling just over half a million passengers in 2009.

Figure 1: Total terminal passengers at the seven surveyed airports, 2009



Source: CAA Airport Statistics 2009

- 3.3 The seven airports surveyed differ not only in terms of size but also in terms of the type of passengers that use them (Figures 2 to 4 and Annex B Table 1). For example:

- In 2009, **Heathrow** had a much higher proportion of long-haul passengers than other airports at 54%. Heathrow also had a relatively high proportion of passengers who were foreign residents (58%) and who were travelling on business (29%) compared with the average.
- **Stansted** and **Luton** both have a high proportion of passengers on short-haul flights (around 9 out of 10) and a low proportion (less than a fifth) travelling on business. The age profile of passengers using Stansted is relatively young, with nearly half (47%) of adult passengers aged between 16 and 34 years.
- **Manchester** and **Gatwick** were the only airports in the sample in 2009 with a substantial proportion of charter flights; 31% of passengers at Manchester and 19% at Gatwick travelled on chartered flights in 2009. A relatively high proportion of passengers at both airports travelled for leisure purposes (83% and 85% respectively) and, after Heathrow, these airports had the highest proportion of long-haul passengers in the sample (25% and 17% respectively).
- At **Edinburgh** airport, a relatively high proportion of passengers were on domestic flights (44%) and travelling for business purposes (30%).
- **Inverness** is a small, local airport where the large majority of passengers are UK residents (91%) and are on domestic flights (89%).

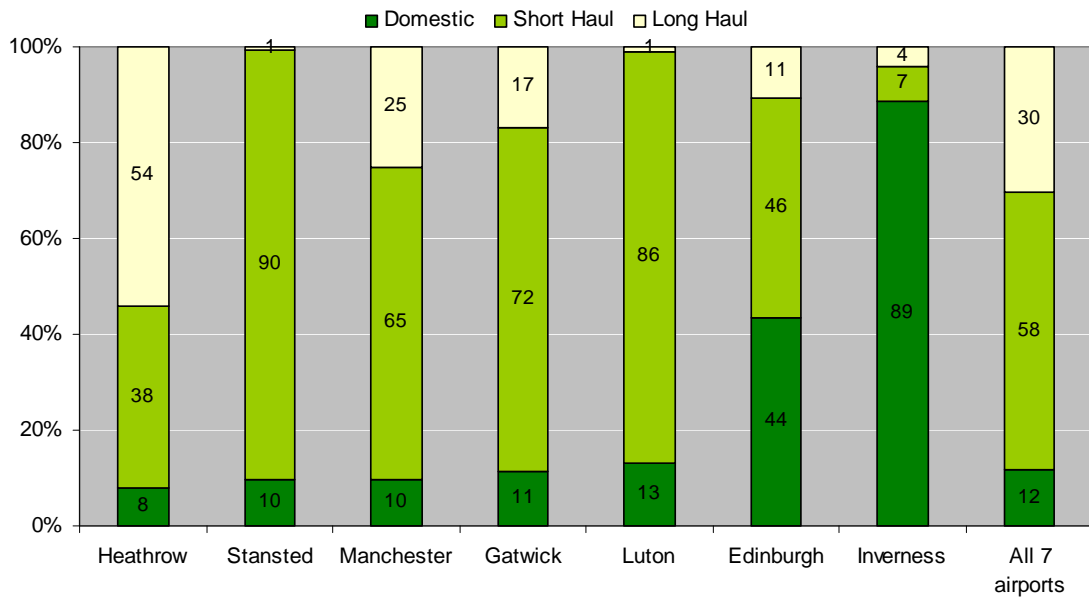
3.4 These differences between airports should be taken into account when interpreting the results of the survey module presented here and make it difficult directly to compare results for different airports.

Figure 2: Terminal passengers by airport and purpose



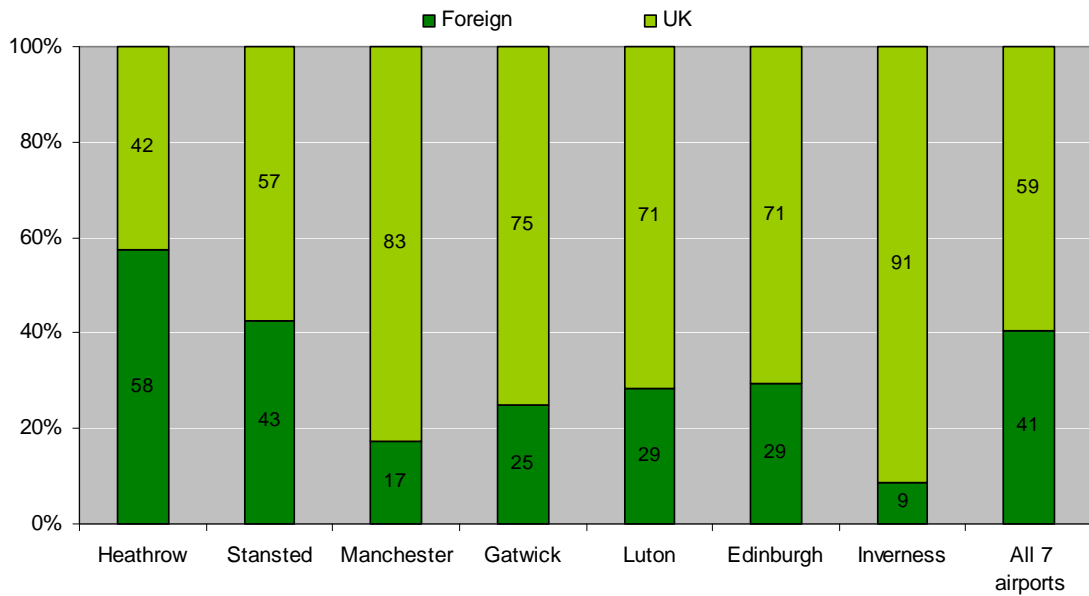
Source: CAA Passenger Survey 2009

Figure 3: Terminal passengers by airport and destination



Source: CAA Passenger Survey 2009

Figure 4: Terminal passengers by airport and country of residence



Source: CAA Passenger Survey 2009

4. Survey module results

- 4.1 The following tables and charts show the final results from the survey module conducted during 2009. The results are based on the responses received from the subsample of passengers interviewed by the CAA at the selected seven airports. The responses have been weighted to reflect the actual distribution of passengers at each airport terminal and by flight destination (domestic, short-haul and long-haul). In some cases, results for 2008 are included for the 3 airports which were surveyed in 2008 and 2009 (Heathrow, Stansted and Manchester).
- 4.2 In total, 25,390 passengers were interviewed for the survey module during 2009 across the seven airports. Passengers who did not answer a particular question (either refused or said they didn't know) have been excluded from the analysis of that question. Where sample sizes are sufficient, differences by flight and passenger characteristics have been examined.
- 4.3 Detailed results are available in **Annex B – Table 2 to 10**. Percentages may not add up to 100 in some tables due to rounding.

Check-in

- 4.4 The survey module first asked passengers “*how satisfied are you with your experience at check-in today?*”. All seven airports were rated highly by those passengers that responded, with 92% saying they were very or fairly satisfied and 71% saying they were very satisfied. The proportion of satisfied passengers ranged from 89% at Stansted to 96% at Inverness.
- 4.5 The proportion of passengers surveyed at Heathrow who said they were very or fairly satisfied with their experience at check-in increased from 91% in 2008 to 94% in 2009.

Figure 5: Satisfaction with experience at check-in

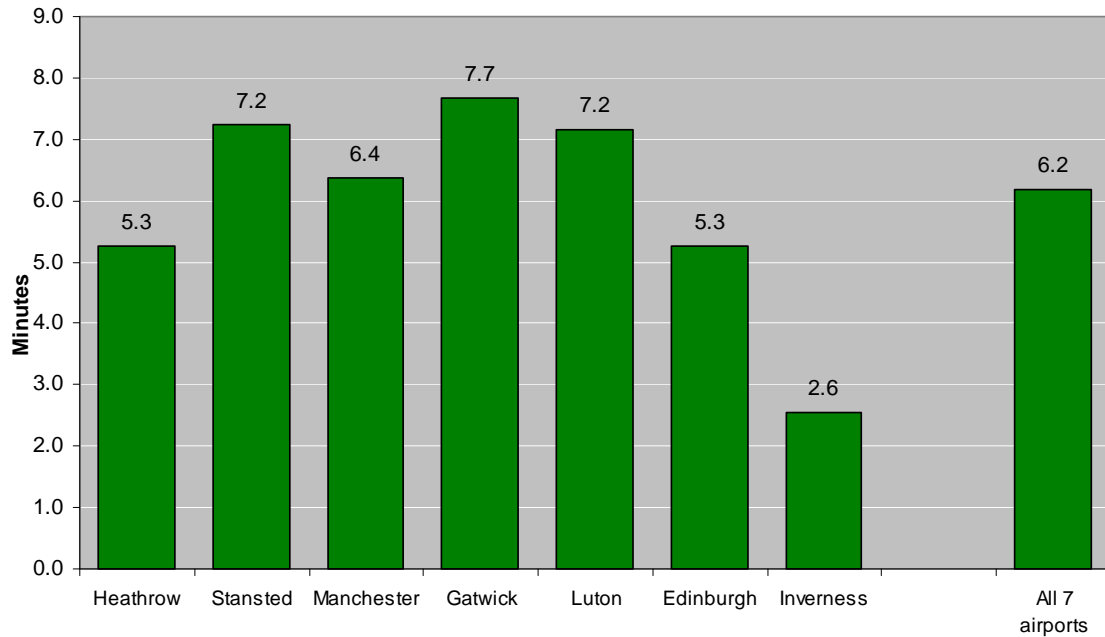
	Very or fairly satisfied	Neither	Very or fairly dissatisfied	Responses
2009				
Heathrow	94%	3%	3%	5,865
Stansted	89%	5%	5%	3,086
Manchester	92%	5%	3%	4,493
Gatwick	92%	4%	4%	4,859
Luton	91%	5%	5%	955
Edinburgh	93%	4%	3%	2,472
Inverness	96%	3%	2%	501
All 7 airports	92%	4%	4%	22,231
2008				
Heathrow	91%	4%	4%	5,421
Stansted	90%	5%	5%	3,602
Manchester	93%	4%	3%	3,794

Source: CAA Passenger Survey 2008 and 2009 – DfT module. Weighted results.

- 4.6 Among all sub-groups examined, over 91% said they were satisfied (fairly or very) with their experience of check-in. (See Annex B - Table 2).

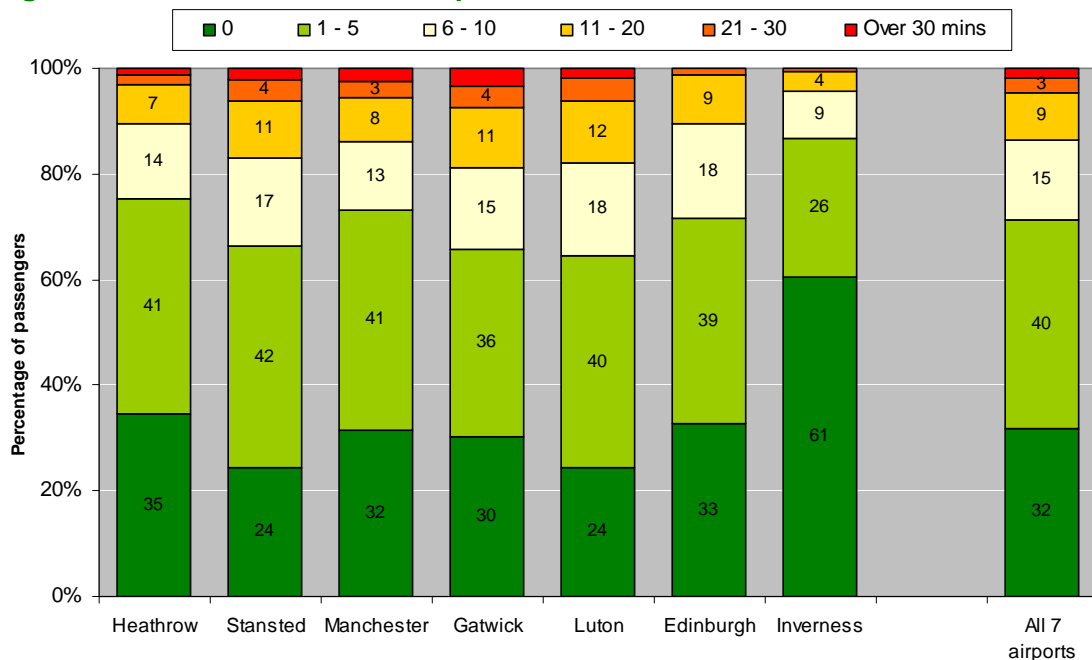
4.7 The amount of time passengers spend queuing at check-in is likely to have an impact on their level of satisfaction. The following charts are based on how long passengers said they had queued at check-in. Non-response for this question was high at some airports, particularly Stansted. This is likely to be because a significant number of people flying did not check-in at the airport. This should be taken into account when interpreting these results.

Figure 6: Average time queued at check-in¹



Source: CAA Passenger Survey 2009 – DfT module. Weighted results.

Figure 7: Time band of check-in queue time¹



Source: CAA Passenger Survey 2009 – DfT module. Weighted results.

¹ Based on respondents who checked in at the airport

- 4.8 On average the queuing time at check-in was shortest at Inverness airport (2.6 minutes). This partly reflects the high proportion of passengers at Inverness who are on domestic flights (89%) and therefore may not have any luggage to check in. Check-in time was also relatively short at Edinburgh (5.3 minutes), which also has a relatively high proportion (44%) of passengers on domestic flights, and at Heathrow (5.3 minutes).
- 4.9 At each airport there were many passengers that said they did not queue at all; 61% of passengers at Inverness and around a third of passengers at Heathrow (35%) and Edinburgh (33%) said this was the case. For all seven airports combined 71% of passengers queued for 5 minutes or less and 86% for 10 minutes or less.
- 4.10 The estimated check-in queuing time was lower in 2009 than in 2008 at each of the three airports included in both survey years, falling from 6.1 to 5.3 minutes at Heathrow, from 9.2 to 7.2 minutes at Stansted and from 8.2 to 6.4 at Manchester.
- 4.11 There were variations in the queuing times experienced at check-in by different types of passengers. Some of the main differences in the proportion of passengers who queued for 5 minutes or less were: 80% of business passengers compared with 69% of leisure passengers; 72% of scheduled flight passengers compared with 62% on charter flights; 84% of domestic flight passengers compared with 70% of short and long haul passengers. (See Annex B - Table 3).

Flight information

- 4.12 Passengers interviewed were then asked “*how satisfied are you with flight information provided at the airport?*”. Overall, 91% of respondents said they were very or fairly satisfied. The proportion of passengers that were satisfied with flight information was highest at Edinburgh airport (96%) and lowest at Luton (84%).
- 4.13 Between 2008 and 2009 the proportion of passengers satisfied with flight information increased at Heathrow (from 87% to 92%) and at Manchester (87% to 91%) and remained the same at Stansted (91%).

Figure 8: Satisfaction with flight information provided at the airport

	Very or fairly satisfied	Neither	Very or fairly dissatisfied	Responses:
2009				
Heathrow	92%	5%	3%	6,212
Stansted	91%	5%	3%	4,462
Manchester	91%	6%	3%	4,200
Gatwick	91%	5%	4%	5,236
Luton	84%	13%	3%	1,296
Edinburgh	96%	3%	1%	2,697
Inverness	93%	5%	2%	507
All 7 airports	91%	6%	3%	24,610
2008				
Heathrow	87%	9%	5%	5,627
Stansted	91%	5%	3%	4,031
Manchester	87%	8%	5%	3,483

Source: CAA Passenger Survey 2008 and 2009 – DfT module. Weighted results.

Airport facilities

4.14 Passengers were next asked “*how satisfied are you with the airport’s facilities (e.g. shops, restaurants, waiting areas)?*” Overall, 86% of passengers were satisfied with the facilities; 52% were very satisfied and 34% fairly satisfied. Satisfaction with the facilities provided varied between surveyed airports, ranging from 74% very or fairly satisfied at Luton to 91% at Stansted. The proportion who said they were very satisfied ranged from 37% at Luton to 55% at Heathrow and 57% at Inverness.

4.15 Satisfaction with airport facilities was higher in 2009 than in 2008 at all three of the airports surveyed in both years.

4.16 Business passengers were slightly less likely to be satisfied with facilities than leisure passengers (84% and 87% respectively). (See Annex B - Table 5).

Figure 9: Satisfaction with airport facilities

	Very or fairly satisfied	Neither	Very or fairly dissatisfied	Responses
2009				
Heathrow	86%	10%	4%	6,189
Stansted	91%	7%	3%	4,425
Manchester	83%	12%	5%	3,574
Gatwick	88%	9%	4%	5,211
Luton	74%	22%	4%	1,264
Edinburgh	83%	15%	2%	2,693
Inverness	88%	5%	6%	516
All 7 airports	86%	10%	4%	23,872
2008				
Heathrow	80%	13%	7%	5,407
Stansted	89%	8%	3%	3,971
Manchester	74%	16%	10%	3,166

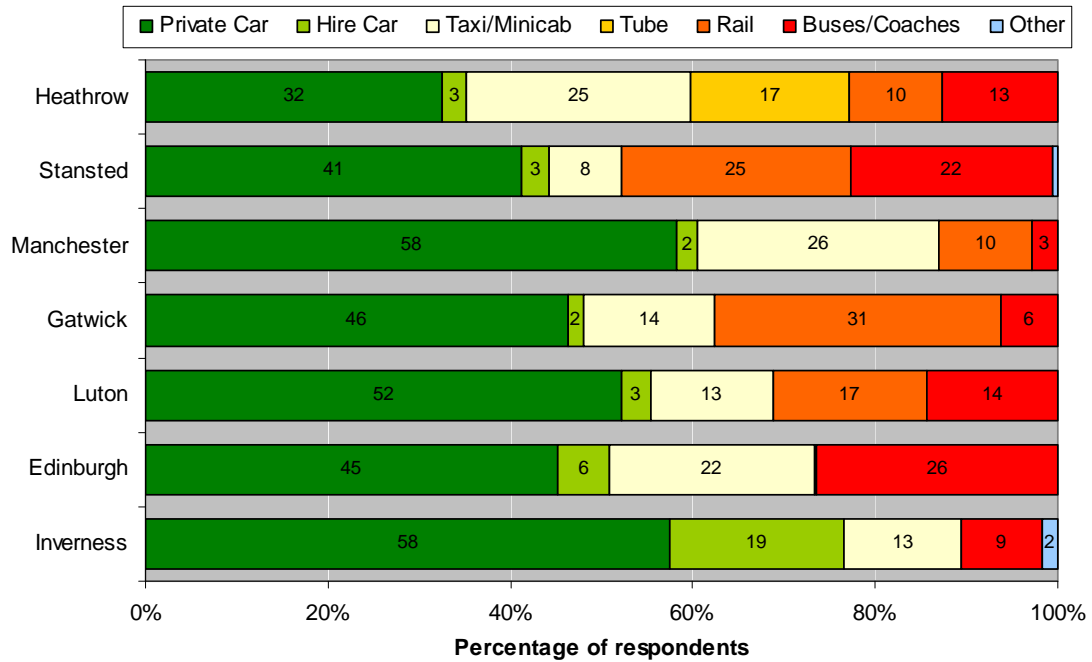
Source: CAA Passenger Survey 2008 and 2009– DfT module. Weighted results.

Public transport links

4.17 How passengers can and do travel to individual airports varies. The main CAA passenger survey found that of all terminating passengers¹ in 2009 Stansted had the highest level of public transport use of the seven airports at 47% (25% of passengers travelled by rail and 22% by bus/coach). The use of public transport to travel to/from the airport was also relatively high at Heathrow (40%) and Gatwick (37%). Only 9% of respondents at Inverness said they had travelled to the airport by public transport (Figure 10).

¹ Terminating passengers arrive at or depart from the airport by surface modes of transport (i.e. excludes transfer passengers).

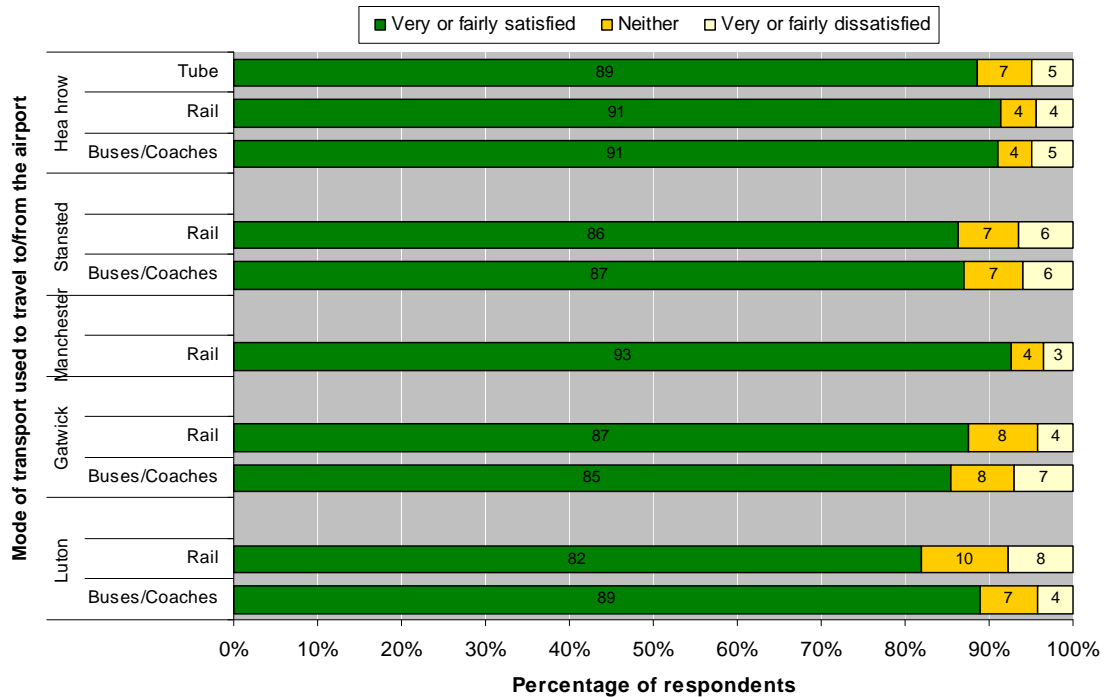
Figure 10: Mode of transport used to travel to the airport



Source: CAA Passenger Survey 2009. Weighted results.

4.18 All passengers in the survey module subsample were asked “*how satisfied are you with the public transport links to the airport?*”. The response rates for this question was low (34%), particularly among respondents who had travelled by car or taxi. Therefore results for this question are presented by mode for those who travelled by public transport only and are only included where the sample of respondents was over 100.

Figure 11: Satisfaction with public transport links



Source: CAA Passenger Survey 2009 – DfT module. Unweighted results.
 Note: Mode of transport shown only where sample size is over 100 passengers.

- 4.19 The percentage of passengers who had travelled to the airport by rail and were very or fairly satisfied with the public transport links was higher for respondents at Manchester (93%) and Heathrow (91%) than at Stansted (86%), Gatwick (87%) and Luton (82%).
- 4.20 The number of respondents travelling by bus/coach was too small to detect any significant differences in levels of satisfaction between airports or between bus and rail for individual airports.
- 4.21 Among respondents who had travelled to Heathrow by tube, 89% said they were satisfied with public transport links to the airport; this was similar to 2008 (88%).

Security screening

- 4.22 The DfT sponsored survey module asked a set of questions about the security screening used when the passenger entered the departure lounge. This covered the bag x-ray machine, the metal detector, and the body and bag searches. The first question asked “*how satisfied are you with your experience of the security screening used at the airport today?*”. Overall, 88% of the respondents at the seven airports said they were very or fairly satisfied.
- 4.23 The proportion of satisfied passengers was higher at Manchester and Edinburgh (94%) than at the other five airports surveyed (87 to 89%) and was higher among those travelling for leisure purposes (90%) than business travellers (83%). (See Figure 12 and Annex B - Table 7).
- 4.24 The proportion of respondents at Heathrow, Stansted and Manchester who were satisfied with their experience of security screening was similar in 2009 to 2008.

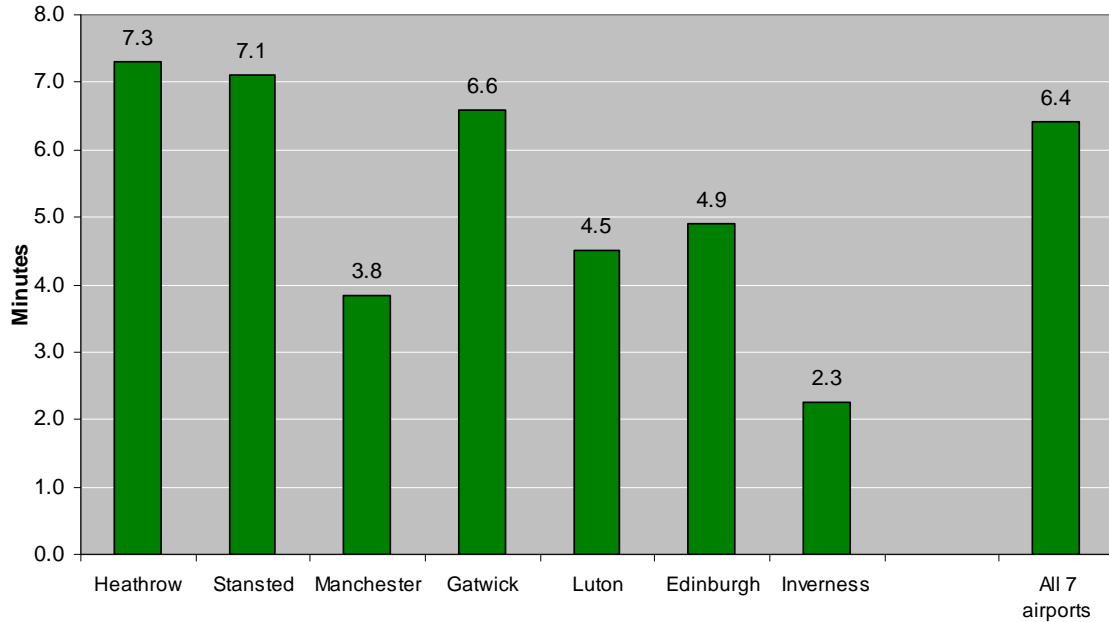
Figure 12: Satisfaction with security screening

	Very or fairly satisfied	Neither	Very or fairly dissatisfied	Responses
2009				
Heathrow	87%	8%	6%	6,220
Stansted	88%	7%	5%	4,458
Manchester	94%	4%	3%	4,732
Gatwick	87%	8%	5%	5,212
Luton	87%	7%	6%	1,345
Edinburgh	94%	3%	2%	2,688
Inverness	89%	6%	5%	509
All 7 airports	88%	7%	5%	25,164
2008				
Heathrow	86%	8%	6%	4,876
Stansted	87%	7%	6%	4,059
Manchester	94%	3%	3%	3,854

Source: CAA Passenger Survey 2008 and 2009 – DfT module. Weighted results.

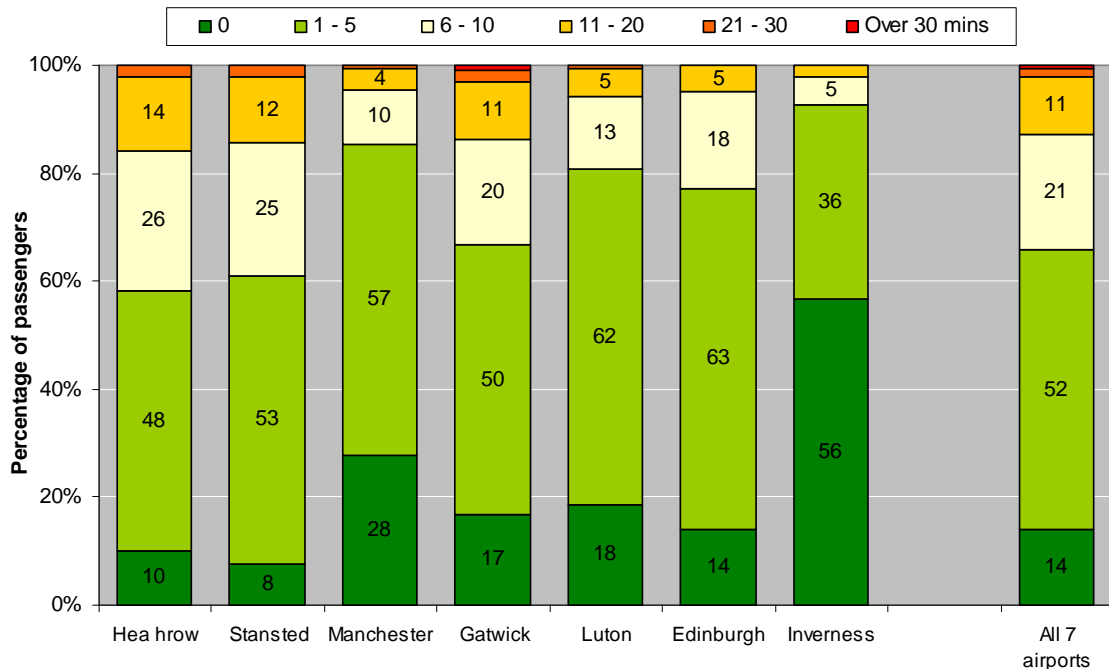
4.25 The following charts are based on how long passengers said they had to wait to be security screened. Passengers at Inverness on average queued for the shortest amount of time (2.3 minutes). Queuing times were also low at Manchester (3.8 minutes), Luton (4.5) and Edinburgh (4.9). Passengers at Heathrow and Stansted said they queued for just over 7 minutes, on average.

Figure 13: Average time queued at security screening



Source: CAA Passenger Survey 2009 – DfT module. Weighted results.

Figure 14: Time band of security screening queue time



Source: CAA Passenger Survey 2009 – DfT module. Weighted results.

- 4.26 At each airport, many passengers that said they did not queue at all for security screening; 14% of all passengers recorded no queuing time. Over half (56%) of respondents at Inverness airport said they did not spend any time queuing at security screening. Overall, 66% of passengers queued for 5 minutes or less, ranging from 58% at Heathrow to 92% at Inverness. (See Annex B - Table 8).
- 4.27 The average time spent queuing at security screening was the same in 2009 as in 2008 at Stansted and Manchester but had increased from 5.4 to 7.3 minutes at Heathrow².
- 4.28 Passengers were also asked how strongly they agreed or disagreed with the statement: “*Any inconvenience caused by the security screening was acceptable*”. Overall, 89% of passengers strongly agreed or agreed. The proportion agreeing with this statement was highest among respondents at Edinburgh (95%), Manchester (94%) and Inverness (93%) with a high proportion saying they strongly agreed (79% at Manchester, 76% at Edinburgh and 74% at Inverness compared to less than 60% at the other airports surveyed).
- 4.29 Business passengers were less likely to agree with the statement than leisure passengers (87% and 90% respectively). (See Annex B - Table 9).

Figure 15: Agreement with the statement: *Any inconvenience caused by the security screening was acceptable*

	Strongly agree or agree	Neither	Strongly disagree or disagree	Responses
2009				
Heathrow	88%	7%	5%	6,189
Stansted	88%	7%	5%	4,142
Manchester	94%	3%	3%	3,149
Gatwick	89%	6%	5%	5,136
Luton	88%	6%	6%	1,347
Edinburgh	95%	3%	2%	2,671
Inverness	93%	4%	4%	507
All 7 airports	89%	6%	5%	23,141
2008				
Heathrow	87%	7%	6%	5,037
Stansted	89%	6%	5%	3,767
Manchester	93%	4%	3%	3,247

Source: CAA Passenger Survey 2008 and 2009 – DfT module. Weighted results.

² In 2008 Heathrow T4 passengers were not asked the questions on security screening as interviews were conducted prior to screening.

Overall airport experience

4.30 Finally, passengers were asked to consider their overall airport experience by saying how strongly they agreed or disagreed with the statement: “*I will consider NOT using this airport again because of my experience of using it today*”. The proportion of respondents who disagreed or strongly disagreed with this statement was high (at least 93%) at each of the seven airports; overall 94% of respondents disagreed with this statement and only 2% of passengers agreed. (See Annex B - Table 10).

Figure 16: Agreement with the statement: *I will consider NOT using this airport again because of my experience of using it today*

	Strongly agree or agree	Neither	Strongly disagree or disagree	Responses
2009				
Heathrow	2%	4%	94%	6,180
Stansted	2%	3%	95%	4,434
Manchester	2%	4%	94%	4,526
Gatwick	3%	4%	94%	5,158
Luton	3%	3%	93%	1,345
Edinburgh	0%	2%	98%	2,656
Inverness	2%	1%	98%	506
All 7 airports	2%	4%	94%	24,805
2008				
Heathrow	4%	5%	91%	5,597
Stansted	3%	3%	94%	3,984
Manchester	3%	3%	94%	3,751

Source: CAA Passenger Survey 2008 and 2009 – DfT module. Weighted results.

Air passenger experience: CAA Survey module

I would now like to ask you a few questions about your experience of using the airport today.

1. How satisfied are you with your experience at check in today?
 - Very satisfied
 - Fairly satisfied
 - Neither satisfied nor dissatisfied
 - Fairly dissatisfied
 - Very dissatisfied

2. And for how long, in minutes, did you queue at check-in today?
[Put 0 minutes in if did not queue]

3. How satisfied are you with flight information provided at the airport?
 - Very satisfied
 - Fairly satisfied
 - Neither satisfied nor dissatisfied
 - Fairly dissatisfied
 - Very dissatisfied

4. And how satisfied are you with the airport's facilities (e.g. shops, restaurants, waiting areas)?
 - Very satisfied
 - Satisfied
 - Neither satisfied nor dissatisfied
 - Fairly dissatisfied
 - Very dissatisfied

5. And, how satisfied are you with the public transport links to the airport?
 - Very satisfied
 - Fairly satisfied
 - Neither satisfied nor dissatisfied
 - Fairly dissatisfied
 - Very dissatisfied

The next four questions are about the security screening used when you entered the departure lounge. That is the bag x-ray machine, the metal detector, and the body and bag searches.

6. How satisfied are you with your experience of the security screening used at the airport today?

- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied

7. Why do you say that? [open response]

8. For how long, in minutes, did you queue when waiting to be security screened?

[if say did not queue then put 0 minutes]

9. And how strongly do you agree or disagree with the following statement

Any inconvenience caused by the security screening was acceptable

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Finally I wish to ask you a question about your overall experience of using the airport today - that is using the check in, the flight information, the security screening and the facilities.

10. How strongly do you agree or disagree with the following:

I will consider NOT using this airport again because of my experience of using it today

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

11. Why do you say that? [open response]

End of questionnaire

Other surveys and research

There have been a number of other recent surveys and research projects to gather evidence about the air passenger experience.

'Public experiences of and attitudes to air travel' - Office for National Statistics (ONS) Omnibus survey:

DfT commissioned a module of questions in the February 2010 ONS Omnibus survey. This is a survey of about 1,000 adults in private households in Great Britain. The module covered the frequency and purpose of air travel; how people travel to airports; how passengers rate their experiences at airports (e.g. check-in, security screening, in-flight, and baggage collection); attitudes towards air travel (e.g. airport expansion, environmental impacts). Results were published on 29 July 2010. This module was previously run in the Omnibus survey in May 2008 and May 2006.

<http://www.dft.gov.uk/pgr/statistics/datatablespublications/trsnstatsatt/>

CAA advice to Secretary of State under Section 16 of the Civil Aviation Act 1982:

In 2008, ORC International, an independent market research company, conducted a survey of passengers' views and experiences at major UK airports. The survey was commissioned by the CAA and covered Heathrow, Gatwick, Stansted and Manchester airports. The survey was designed to capture a range of stages involved in the passenger experience from buying an air ticket, outbound travel through the airport, the in-flight experience and inbound travel through the airport as well as complaint handling if anything goes wrong. About 1,600 in-depth telephone interviews were carried out with passengers when they returned home from their trip. The results were published on 9 March 2009.

<http://www.dft.gov.uk/pgr/aviation/hci/airpassengerexperience/>
or <http://www.caa.co.uk/default.aspx?catid=1795>

Understanding the airport passenger experience - Qualitative research to inform the review of the framework for the economic regulation of airports:

Independent Social Research was commissioned by DfT to undertake qualitative research to explore the experiences of business and leisure passengers using UK airports. The objectives were to understand the key factors that affect airport experience in terms of the end-to-end journey; compare experiences across passenger types; and highlight passengers' priorities for improvement. The research involved focus groups but individual interviews were also conducted with people aged 70 and over and with passengers with disabilities or health problems. Publication of the results formed part of the consultation published on 9 March 2009.

<http://www.dft.gov.uk/pgr/aviation/airports/reviewregulationukairports/understandingexperience.pdf>

'Improving the air passenger experience' - End-to-end journeys:

A number of airport specific reports have been published on 'Improving the air passenger experience - An analysis of end-to-end journeys'. These reports covered Heathrow (published November 2007), Stansted, Luton, Manchester (all published September 2008), and Gatwick (March 2009). The analysis was based on a wide range of existing data sources.

<http://webarchive.nationalarchives.gov.uk/+http://www.dft.gov.uk/about/strategy/transportstrategy/tasts/userexperience/>