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Public experiences of and attitudes towards air travel: 2014

Department for Transport

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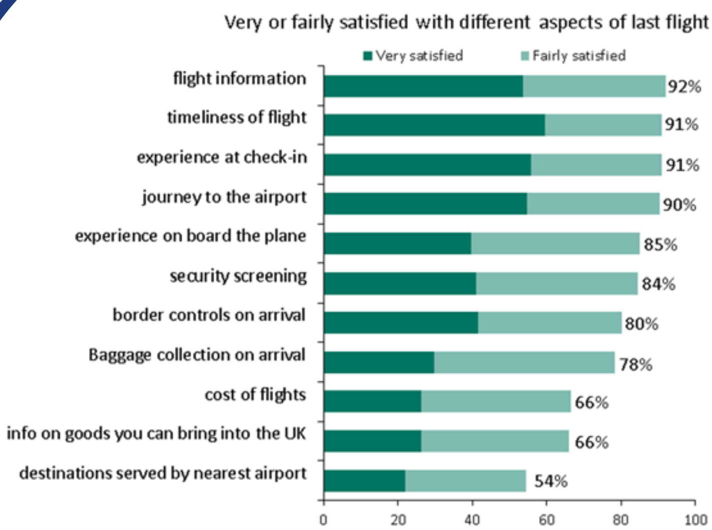
Main findings

Levels of air travel

Just under half (48%) of adults surveyed had flown at least once in the last 12 months and 10% had made 4 or more flights.

Ratings of services at UK airports



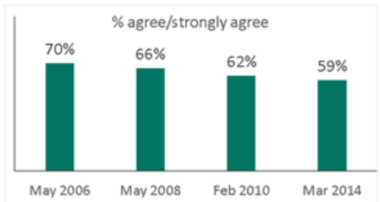
✓ Passengers rated most aspects of service quality on their last flight highly.

✓ At least nine out of ten respondents were very or fairly satisfied with flight information, timeliness of flight, check-in and journey to the airport.

✓ Respondents were least satisfied with the number of destinations served by their nearest airport, information on goods you can bring back into the UK and the cost of flights.

Air travel and the environment

The proportion of respondents who agree that “air travel harms the environment” has fallen from 70% in 2006 to 59% in 2014.



Airport expansion

The results suggest an increase in support for airport expansion since the 2010 survey, with over half of respondents now agreeing that……

“….people should be able to travel by plane as much as they want to, even if new terminals/runways need to be built” (59%)

“…. in order to boost the economy, new terminals and runways should be built” (57%)

In terms of their local airport, 47% said they would support expansion and 20% opposed it.

About these statistics

CONTENTS

1. Introduction

1.1. This report summarises people's experiences of and attitudes towards air travel. The report is based on a set of questions included in the Office for National Statistics' Opinions and Lifestyle Survey in March 2014. The questions were commissioned and designed by the Department for Transport.

1.2. The statistics in this report relate to adults aged 16 and over living in private households in Great Britain. Where sample sizes are sufficient, differences by factors such as sex, age and income have been examined. Detailed results tables are available in Annex A, Tables ATT0601 to ATT0631.

1.3. A similar module of questions was included in the May 2006, May 2008 and February 2010 Omnibus Surveys (the forerunner to the current Opinions and Lifestyle Survey) so some comparisons can be made over time.

2. Patterns of air travel

Number of air trips

2.1 Just under half (48%) of adults said they had taken *at least one*[1] flight in the previous 12 months, either within the United Kingdom or to go abroad. Short-haul flights to Europe were the most common; 37% of adults had taken a short-haul flight during the last 12 months, 18% had taken a long-haul flight and 7% had flown within the UK.

2.2 Just over a fifth (22%) of adults said they had made just one flight (either domestic or international) during the last 12 months and 10% had made four or more flights.

2.3 These proportions are similar to those seen in the 2010 survey.

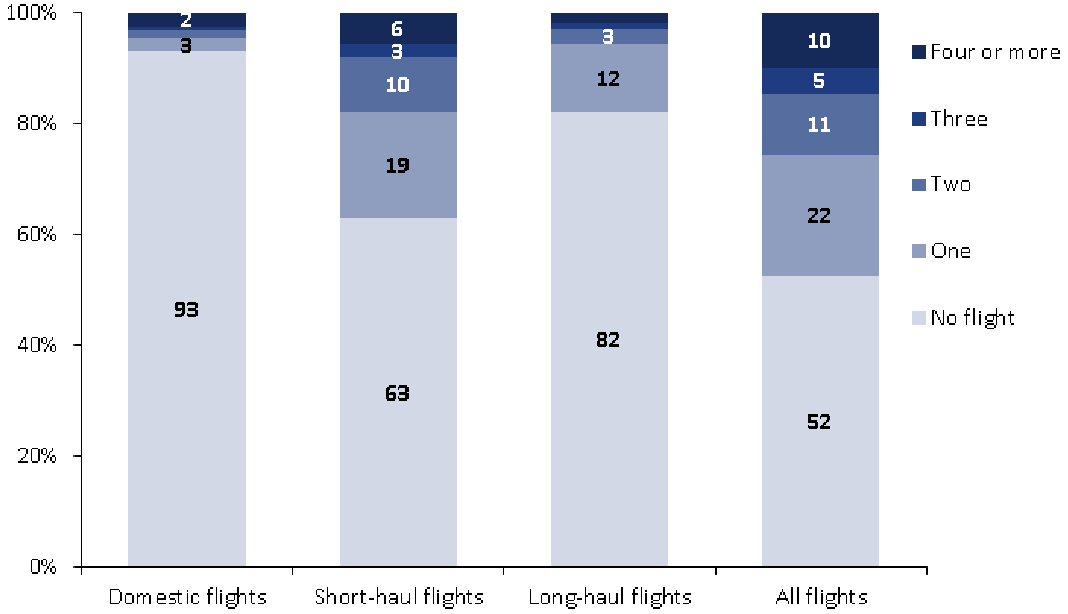
Figure 1: Type and number of flights taken in the last 12 months

		2006	2008	2010	2014
Type of flight taken	Domestic	9%	9%	8%	7%
	Short-haul	36%	39%	37%	37%
	Long-haul	19%	19%	18%	18%
Number of flights taken	0	51%	50%	53%	52%
	1	21%	23%	20%	22%
	2	13%	11%	11%	11%
	3	6%	6%	6%	5%
	4+	9%	10%	10%	10%
Base number		*1,298*	*1,047*	*1,003*	*1,021*

Source: May 2006, May 2008, February 2010 and March 2014 Surveys.

[1] Outward and return flights and any transfers were counted as one trip

Figure 2: Number of flights taken in the last 12 months



Source: March 2014 ONS Opinions and Lifestyle Survey.
Base number: 1,021 (All respondents).

2.4 Frequency of flying increases with income and socioeconomic group. Among respondents in managerial and professional occupations, 71% had made at least one flight in the last 12 months compared with 50% of those in intermediate or routine and 36% in manual occupations.

2.5 Respondents living in London or the South East were also more likely to have travelled by plane than people in the rest of the country. Over half (57%) of people in London and the South East had made at least one flight and 23% had made three or more in the last 12 months compared to 44% and 11% respectively in the rest of the country. People living in London and the South East were also more likely to have made a long-haul flight (29%) than people in the rest of Great Britain (14%) but had a similar propensity to fly within the UK.

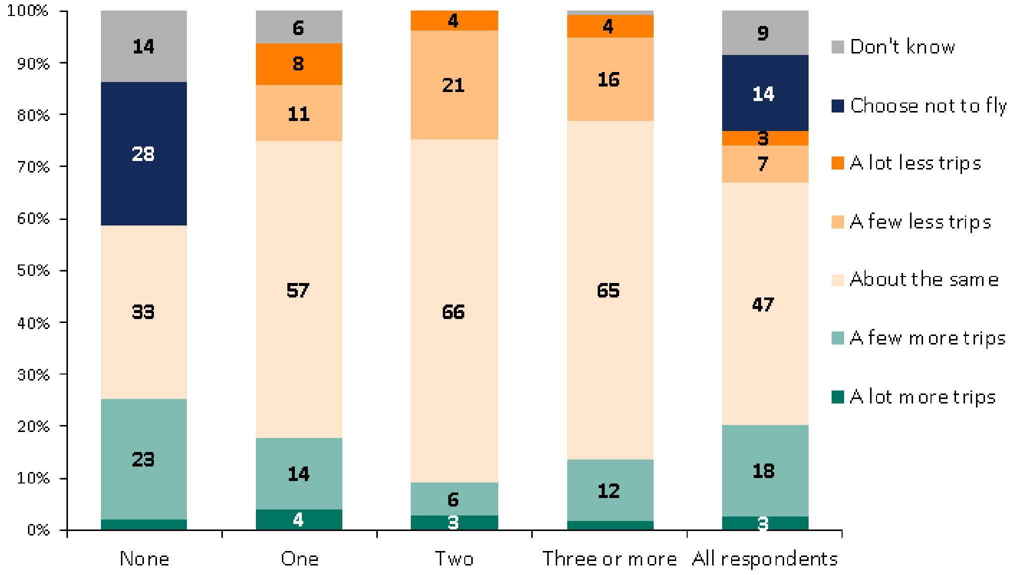
Anticipated changes in levels of air travel

2.6 Overall, 10% of respondents expected to make *fewer trips* in the coming year but twice as many (20%) thought they would make *more trips*. These levels were similar to the 2010 survey.

2.7 When asked this question, 14% said they choose not to fly. This proportion increases with age, from 5% among 16-34 year olds to 47% among people aged 75.

2.8 Figure 3 shows expected levels of air travel by number of trips in the preceding year. A quarter of those who had not flown at all in the previous year said they expected to make more trips in the next year. Among those who had made three or more flights in the previous year, 14% anticipated making more flights and 20% anticipated making fewer flights in the coming year.

Figure 3: Anticipated change in number of flights in next year, by number last year



Source: March 2014 ONS Opinions and Lifestyle Survey.
Base number: No flight = 551; One flight = 211; Two flights = 111; Three or more flights = 137; All respondents = 1010.

2.9 Respondents who expected to make more flights were asked why they believed this would be the case. The most common reason, cited by half of those that expected to make more flights, was because they wanted to go abroad more. Other reasons included changes in personal circumstances (20%) and having friends/relatives who had moved abroad (10%).

2.10 The most common reasons for anticipating making fewer flights related to costs, including the overall cost of travel/holidays (mentioned by 17% of those who expected to fly less) and flights being expensive (17%). Other reasons cited included changes in personal circumstances (17%) and anticipating fewer business trips (11%). No one cited concern about the environment, which was mentioned by 6% of respondents in 2010. [Note that these results are based on small sample sizes and should be interpreted with caution.]

Detailed statistical tables with a breakdown by sub-groups (age, gender, income etc) and overall time series:

- Tables ATT0601 to ATT0603

3. Recent experiences of air travel

3.1 All respondents who had flown from a UK airport in the last 12 months were asked further questions about their most recent trip. These covered the mode of transport they used to travel to the airport and how satisfied or dissatisfied they were with various aspects of their experience at the airport and on board the plane.

Travel to airports

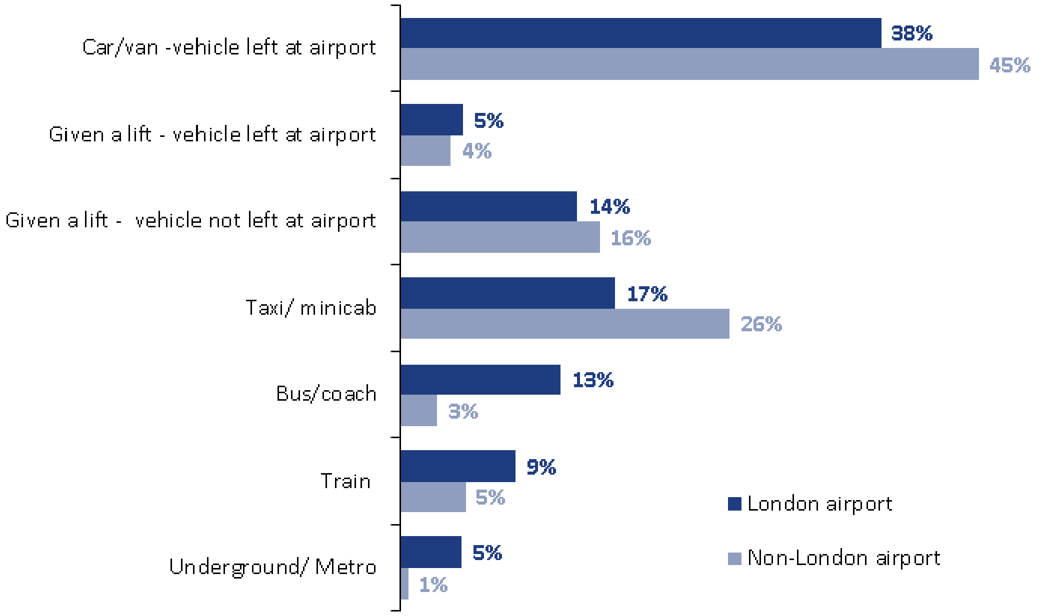
3.2 A majority (81%) of adults who had flown from a UK airport in the last 12 months said that last time they had travelled to the airport by private transport (*car/van or taxi/minicab)*. This proportion has fallen from 87% in 2010 and 90% in 2006.

3.3 In 2014, 41% had *driven themselves and left their vehicle at or near the airport*; 5% had been *given a lift by someone else who had left their car at the airport*; 15% had been *given a lift by someone else whose vehicle was not left at the airport* and 21% had travelled by *taxi/minicab*.

3.4 A further 18% of trips to the airport were by public transport, with 8% by *bus/coach,* 7% by *train* and 3% by *underground/metro*.

3.5 Respondents who took their last flight from a non-London airport were more likely to have travelled to the airport by private transport (91%) than those who took their last flight from one of the five London airports (73%).

Figure 4: Main mode of travel to UK airport on last trip from London and non-London airports



Source: March 2014 ONS Opinions and Lifestyle Survey.
Base number: London airport = 215, other airport = 247 (Respondents w ho travelled by plane in the last 12 month).
Note: Respondents w ere only allow ed to select one mode, the mode that covered the longest distance.

3.6 The main reasons respondents gave for choosing to travel by car/van or taxi (private transport) on their last trip to an airport was because it was the easiest (79%). In addition, around a third (32%) said it was the cheapest method and around a quarter (24%) said it was the quickest.

3.7 Respondents were also asked how satisfied or dissatisfied they were with their journey to the airport. A majority (90%) said they were very or fairly satisfied with their journey with over half (55%) saying they were very satisfied.

Ratings of services at airports

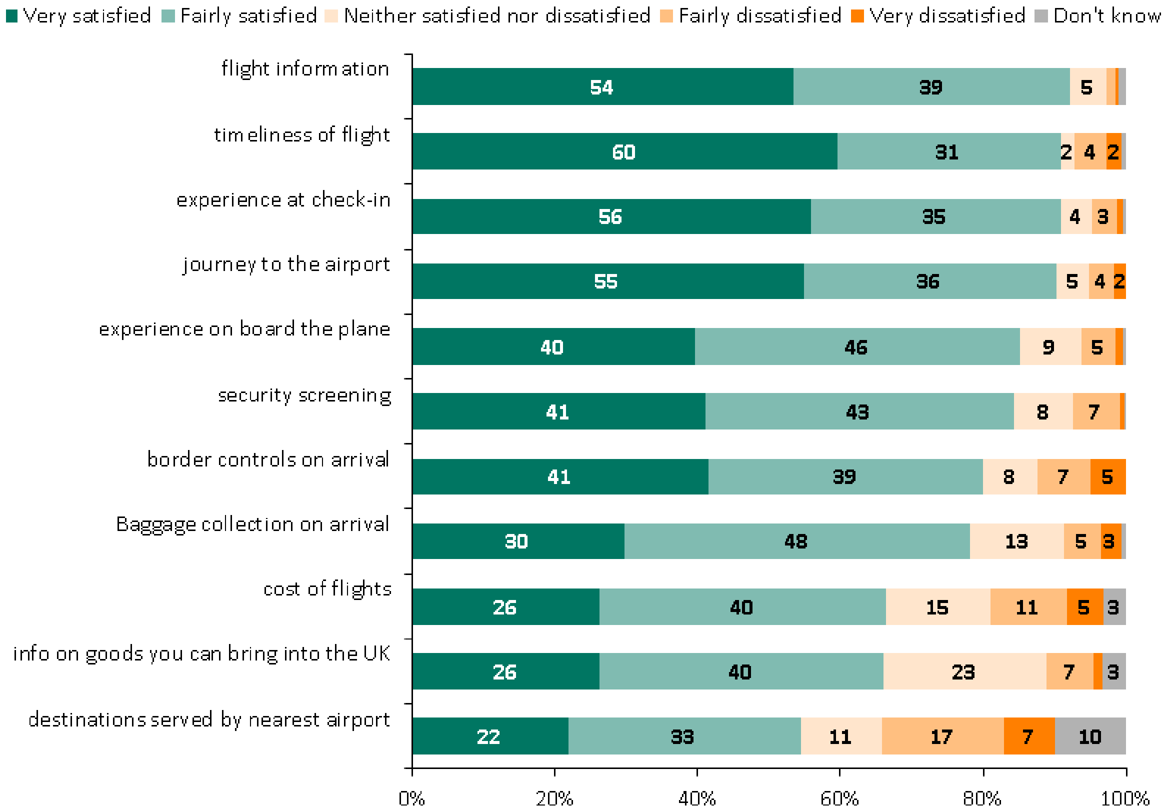
3.8 Most aspects of service were rated highly by respondents, based on their last flight.

3.9 At least 9 out of 10 respondents said they were very or fairly satisfied with the following services: flight information (92%), timeliness of flight (91%), check-in (91%) and journey to the airport (90%).

3.10 Satisfaction was also relatively high with experience on board the plane (85% very or fairly satisfied), security screening (84%), border controls (immigration and customs) on arrival (80%) and baggage collection on arrival (78%).

3.11 Ratings were lowest for the number of destinations served by the nearest airport (54% very or fairly satisfied), the information provided on goods you can bring back into the UK (66%) and the cost of flights (66%). This was partly due to the higher proportion of respondents who were uncertain (‘neither satisfied nor dissatisfied’ or ‘don’t know’) when asked to rate these aspects.

Figure 5: Ratings of different aspects of air travel



Source: March 2014 ONS Opinions and Lifestyle Survey.
Base number: 455 - 461 (Respondents w ho flow n from the UK in the last 12 months).

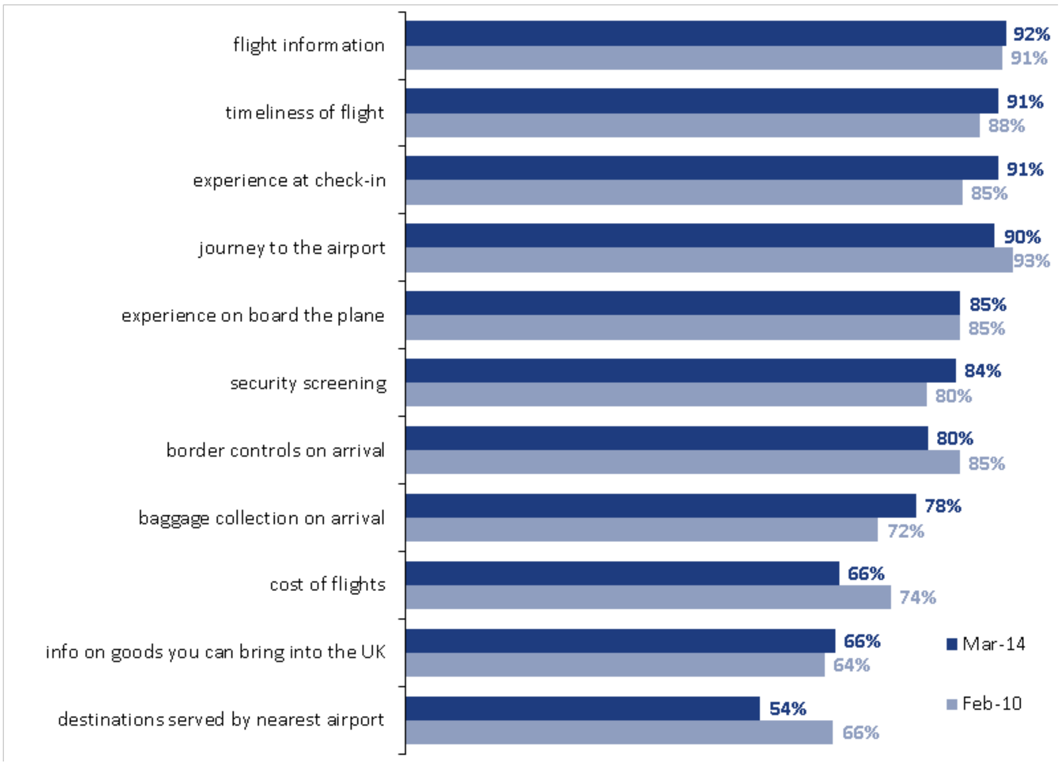
3.12 These results are mostly similar to the previous surveys. The main differences compared to the previous survey in 2010 were:

- a fall in satisfaction with the number of destinations served by their nearest airport from 66% very/fairly satisfied in 2010 to 54% in 2014
- a fall in satisfaction with the cost of flights from 74% to 66%
- an increase in satisfaction with experience at check-in from 85% to 91%.

3.13 The sample size is too small to examine ratings of individual airports. However, combining groups of airports, revealed a difference in satisfaction with the number of destinations served; respondents whose nearest airport was one of the four largest airports (Heathrow, Gatwick, Manchester and Stansted) had a higher level of satisfaction (84% satisfied, 6% dissatisfied) than those living near other airports (41% satisfied - down from 55% in 2010, 33% dissatisfied).

3.14 The difference in satisfaction with destinations served by the nearest airport among residents of London and the South East compared with the rest of Great Britain was not statistically significant. This may be partly because, for many people living in London or the South East, their nearest airport is not Heathrow or Gatwick.

Figure 6: Proportion of respondents very/fairly satisfied with aspects of air travel, 2010 and 2014



Source: February 2010 and March 2014 Surveys.
Base number: 455 - 461 (Respondents who flown from the UK in the last 12 months).

Method of check-in

3.15 A new question was included in the survey module from 2010, asking how respondents had checked in for their last flight. Since 2010, the proportion who said they checked in online has increased from 38% to 62%.

3.16 Frequent flyers were more likely to check in online, with 78% of those who had flown three or more times in the last 12 months saying this was the case compared to 49% among those who had made only one flight.

3.17 Satisfaction with check-in was similar for respondents who had checked in at the airport or online; 93% of those who checked in at the airport said they were very/fairly satisfied compared to 89% of those who checked in online.

Detailed statistical tables with a breakdown by sub-groups (age, gender, income etc) and overall time series:

- Tables ATT0605 to ATT0616

4. Attitudes towards the environmental impacts of air travel

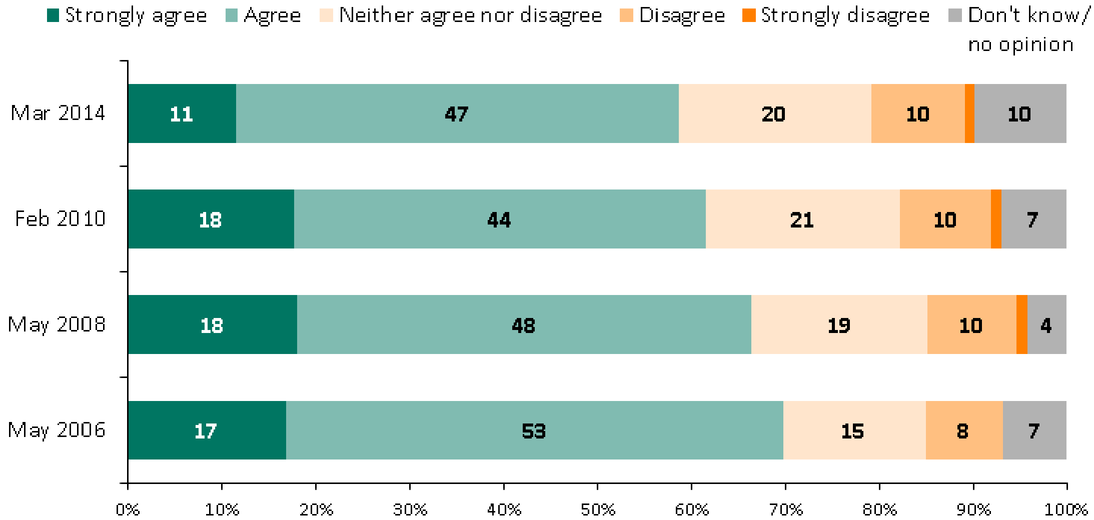
4.1 All respondents, both those that had travelled by plane in the last 12 months and those who had not, were asked a series of questions to assess their attitudes towards the environmental impacts of air travel.

Views on whether air travel impacts on the environment

4.2 In 2014, 59% of respondents agreed that *'air travel harms the environment'* and 11% disagreed.

4.3 The proportion agreeing with this statement has fallen from 70% in the 2006 Omnibus Survey. This fall has been accompanied by an increase in respondents who were uncertain ('neither agree nor disagree' or 'don't know/no opinion'); the proportion who disagreed has remained constant at 11% in the last three surveys.

Figure 7: Levels of agreement/disagreement that air travel harms the environment, 2006-2014



Source: March 2014 Opinions and Lifestyle Survey.
Base number: May 2006 = 1.297; May 2008 = 1.046; February 2010 = 995; March 2014 = 1,018.

4.4 Responses to this question varied with age. The proportion of respondents who agreed or strongly agreed that air travel harms the environment was twice as high among those aged 16-34 years (70%) as those aged 70 and over (35%).

Views on freedom to fly versus restrictions because of the environmental impacts of air travel

4.6 Respondents were also asked whether or not people *'should be able to travel by plane as much as they want to'*. This was first asked without the addition of any caveats. Questions were then asked which highlighted the possible environmental impacts of unrestricted air travel (see below). These questions were asked before the question asking respondents whether they felt that air travel harmed the environment.

a) *People should be able to travel by plane as much as they want to*
b) *People should be able to travel by plane as much as they want to, even if new terminals or runways are needed to meet demand*

c) *People should be able to travel by plane as much as they want to, even if this harms the environment*
d) *People should be allowed to travel by plane as much as they want to, as long as damage to the environment is limited*
e) *In order to reduce the impact of aviation on climate change we should limit the expansion of airports*

4.7 When asked whether *'People should be able to travel as much as they want to'* 81% of respondents agreed (up from 76% in 2010). However, once the environmental consequences of air travel were mentioned support for unrestricted air travel fell significantly across all groups.

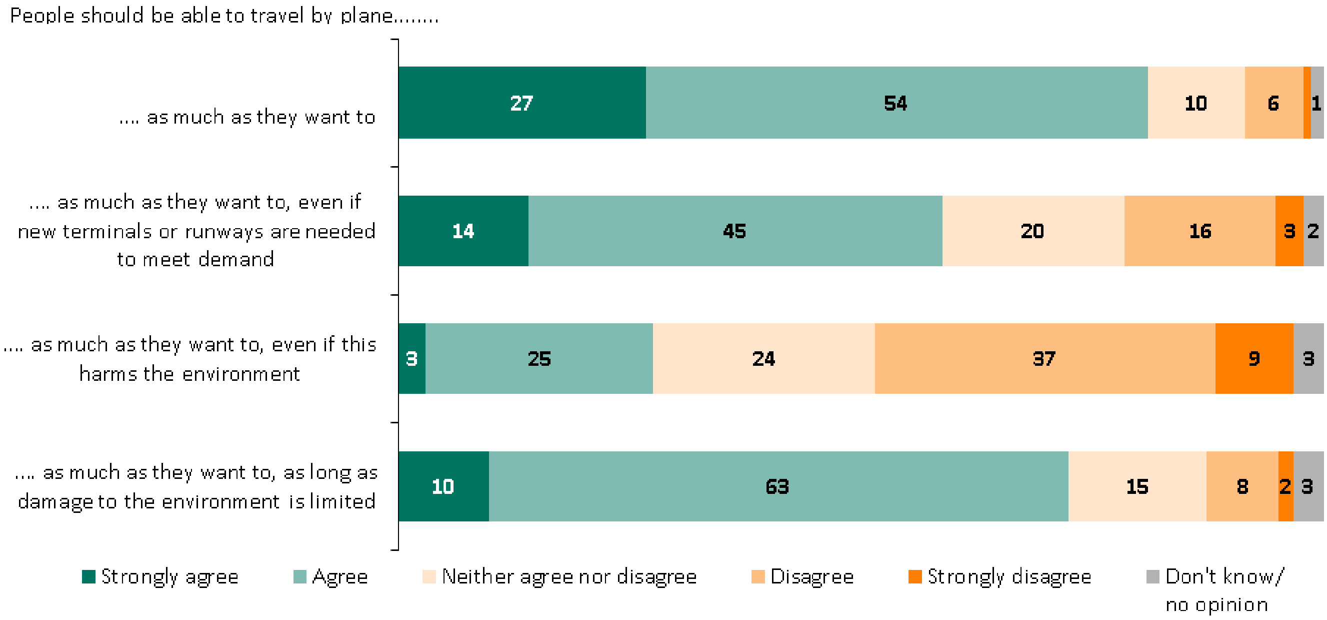
- 59% of adults (up from 49% in 2010) agreed that people should be allowed to travel by plane as much as they want *'even if new terminals or runways are needed to meet demand*', and 19% disagreed.

- 27% of respondents agreed with unrestricted air travel *'even if this harms the environment'* and 45% disagreed (similar to 2010).

- 72% of respondents agreed with unrestricted air travel '*if damage to the environment is limited*' and 9% disagreed (similar to 2010).

- 42% of adults agreed that *'in order to reduce the impact of aviation on climate change we should limit the expansion of airports'* and 26% disagreed. (See section 6 on airport expansion)

Figure 8: Attitudes towards environmental impacts of travel



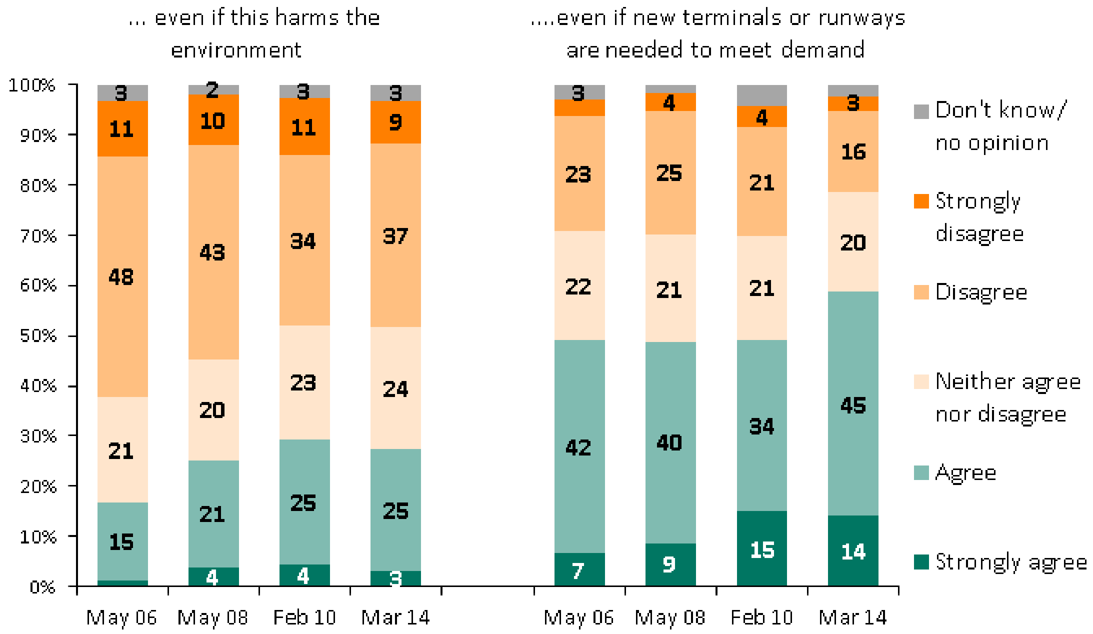
Source: March 2014 Opinions and Lifestyle Survey. Base number: 1,018 (All respondents).

4.8 The proportion of respondents in favour of unrestricted air travel, 'even if this harms the environment', increased between 2006 and 2010 but appears to have levelled off in 2014.

4.9 However, the proportion of respondents agreeing that people should be allowed to fly as much as they like, 'even if new terminals or runways are needed to meet demand' rose to 59% in the 2014 survey having remained constant at 49% in each of the 3 previous surveys in 2006 to 2010.

4.10 The proportion agreeing with unrestricted flying provided damage to the environment is limited has fallen from 78% in May 2006 to 72% in March 2014.

Figure 9 'People should be able to travel by plane as much as they want…..'



Source: 2006, 2008, 2010 and 2014 Surveys.
Base numbers: 2006=1,297, 2008=1,046, 2010=995, 2014=1,018

4.11 Men were more likely than women to agree that people should be able to fly as much as they want even if this harms the environment and even if new terminals/runways are needed to meet the demand.

4.12 People who had made three or more flights in the last year were more likely to support unrestricted flying "as long as damage to the environment is limited" (81% agreed) than those who had made fewer than three flights (71%).

Detailed statistical tables with a breakdown by sub-groups (age, gender, income etc) and overall time series:

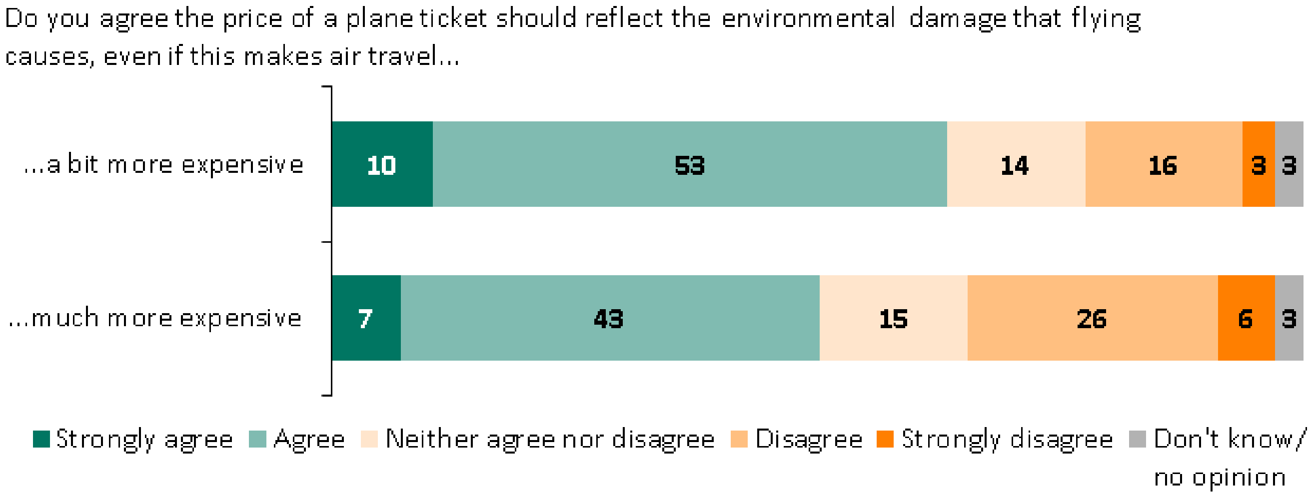
- Tables ATT0617 to ATT0621

5. Willingness to pay for the environmental costs of air travel

5.1 The 59% of respondents who said they agreed (either s*trongly agreed* or *agreed*) that air travel harms the environment were asked whether or not they agreed in principle that the price of a plane ticket should reflect the environmental damage that flying causes. They were then asked how much they would personally be willing to pay.

5.2 Among respondents who believed that air travel harms the environment 63% agreed that *'the price of a plane ticket should reflect the environmental damage that flying causes, even if this makes air travel a bit more expensive'*. A quarter of respondents disagreed with this. Support fell to 50% if this additional cost *'makes air travel much more expensive'*, though more people still supported rather than opposed this scenario (32% said they disagreed). These results are broadly similar to the previous surveys.

Figure 10: Views on paying more for air travel to reflect environmental harm Based on respondents who agree that air travel harms the environment



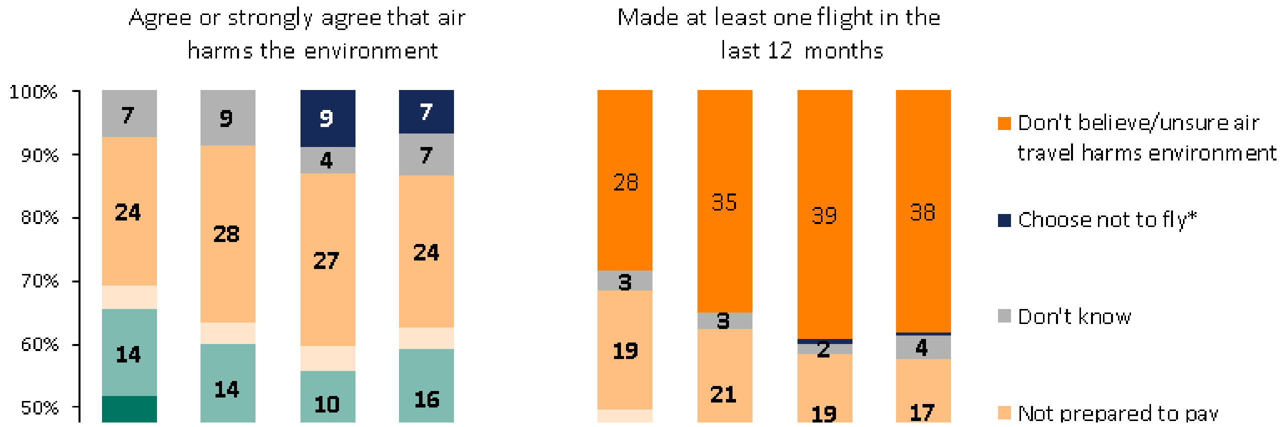
Source: March 2014 Opinions and Lifestyle Survey.
Base number: 582 (Respondents that agree or strongly agree that air travel harms the environment).

5.3 To measure personal willingness to pay more to travel by plane, respondents who agreed that air travel harms the environment were also asked if they would be prepared to pay an extra 20%, 15%, 10%, 5%, or less than 5% on the price of a plane ticket or nothing extra at all.

5.4 Among respondents who believed air travel to be harmful to the environment, nearly a quarter (24%) were not prepared to pay any extra for the price of a plane ticket to reflect the environmental damage flying causes but 63% said they would be willing to pay some additional charge to reflect environmental costs with 44% willing to pay an extra 20%.

5.5 Among all respondents who had flown in the last 12 months, 38% did not believe or were unsure if air travel caused environmental harm, 17% believed that air travel harms the environment but said they would not be willing to pay any additional cost but more than twice as many (41%) said they were willing to pay extra to reflect the environmental damage that flying causes, with over a quarter (27%) willing to pay 20 per cent extra.

Figure 11: Willingness to pay more for air travel to reflect environmental harm



Source: May 2006, May 2008, February 2010 and March 2014 Surveys.
Base numbers: Respondents that agree that air travel harms the environment: 2006=897, 2008=693, 2010=589, 2014=582
Respondents who had flown in the last 12 months: 2006=611, 2008=503, 2010=445, 2014=461
* 'choose not to fly' was not recorded as a response in 2006 and 2008

Detailed statistical tables with a breakdown by sub-groups (age, gender, income etc) and overall time series:

- Tables ATT0622 to ATT0625

6. Attitudes towards airport expansion

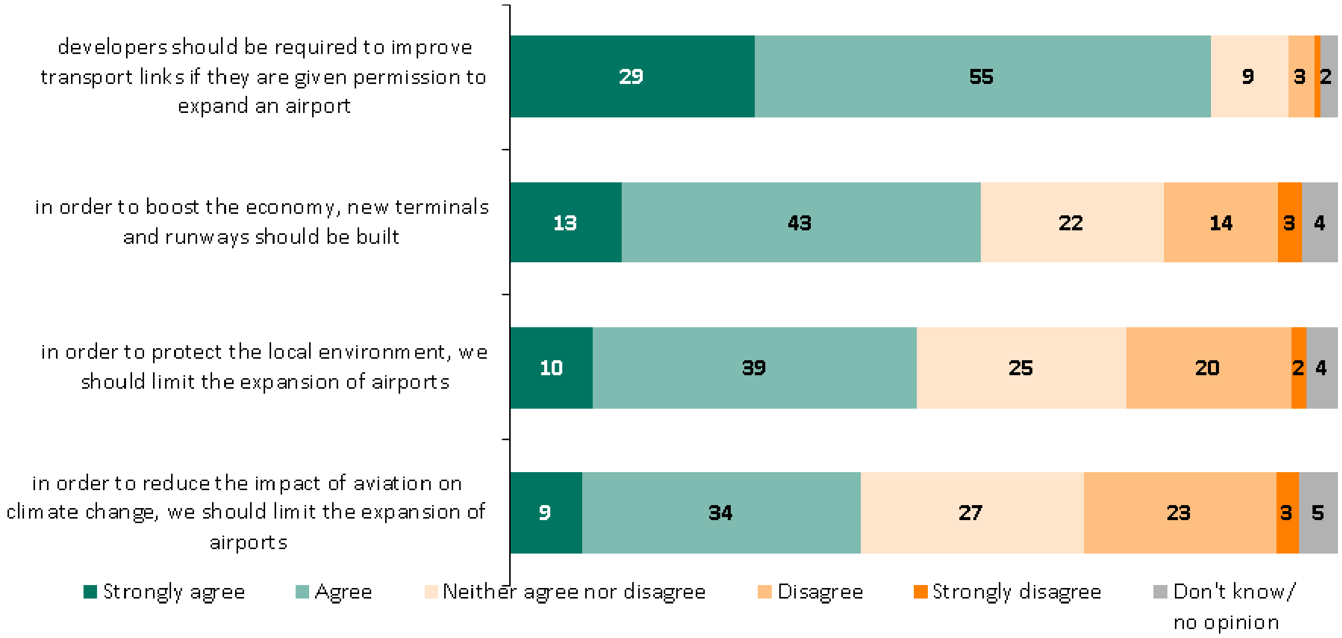
6.1 As discussed in Section 4, willingness to support unrestricted air travel fell when the requirement for new terminals/runways was mentioned (from 81% to 59%), although more people still supported this than opposed it (19%).

General attitudes towards airport expansion

6.2 Respondents were asked several other questions to assess their general attitudes towards airport expansion.

- 85% of adults believed that *'developers should be required to improve transport links if they are given permission to expand'* (similar to 2010). Only 4% disagreed with this.
- 57% (up from 47% in 2010) agreed that *'in order to boost the economy, new terminals and runways should be built'*; while 17% disagreed with this.
- 49% (down from 57% in 2010) agreed that *'in order to protect the local environment, we should limit the expansion of airports';* 22% disagreed.
- 42% (down from 51% in 2010) agreed that '*in order to reduce the impact of aviation on climate change we should limit the expansion of airports';* 26% disagreed.

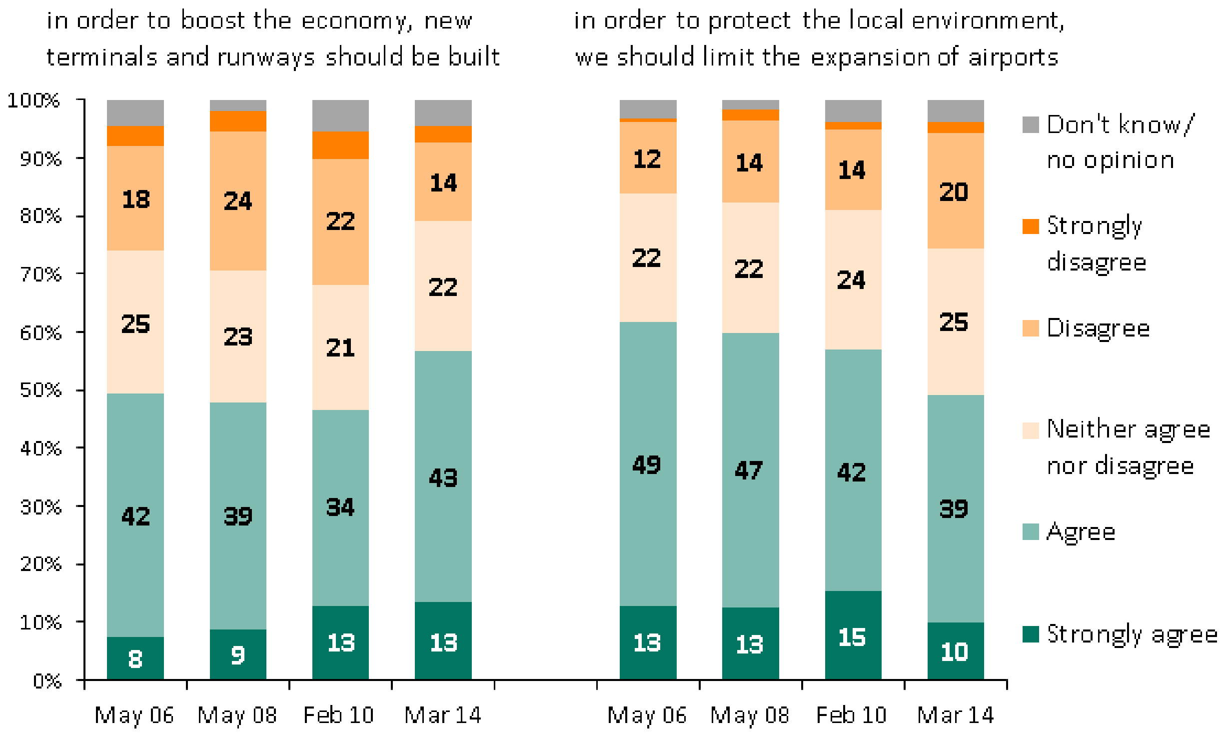
Figure 12: Attitudes towards airport expansion



Source: March 2014 ONS Opinions and Lifestyle Survey. Base number = 1,018 (All respondents).

6.3 These results suggest an increase in support for airport expansion in 2014 compared to previous surveys.

Figure 13: Attitudes towards airport expansion, 2006-2014



Source: 2006, 2008, 2010 and 2014 Surveys.
Base numbers: 2006=1,297, 2008=1,046, 2010=995, 2014=1,018

6.4 Men were more likely than women to agree than new terminals/runways should be built to boost the economy and less likely to agree that airport expansion should be limited to reduce the impact on climate change.

6.5 The survey did not pick up statistically significant differences in support for/against airport expansion among residents of London and the South East compared to those living in the rest of Great Britain. However, London/South East residents were more likely to agree that developers should be required to improve transport links if they are given permission to expand an airport (89%) than other residents (83%).

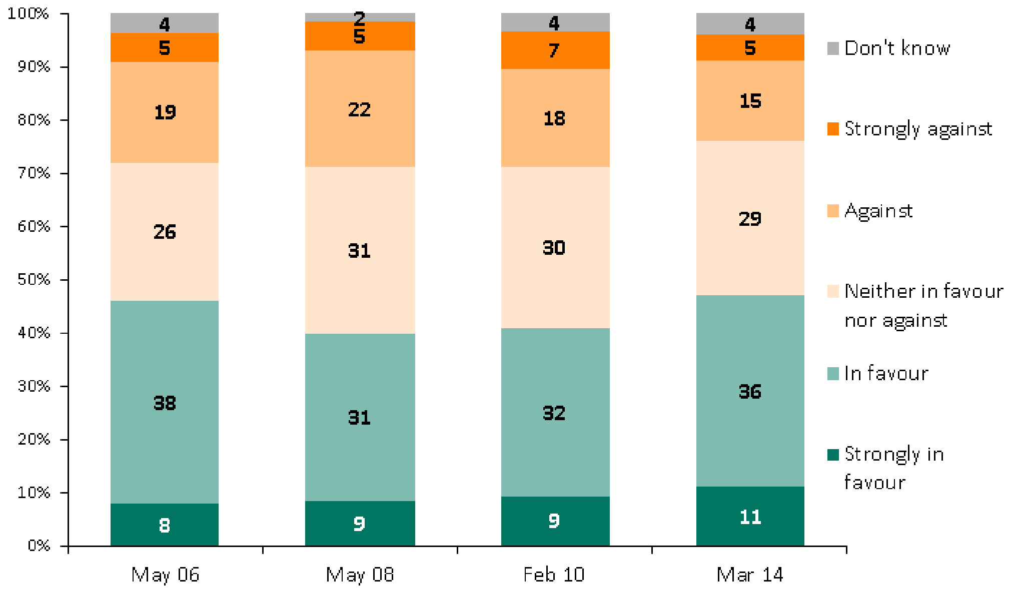
Attitudes towards expansion of local airport

6.6 Respondents were also asked whether they would personally be in favour or against the expansion of their nearest airport and what advantages and disadvantages they thought expansion of their nearest airport would bring to their local area.

6.7 Nearly half (47%) of respondents said they were *in favour* or *strongly in favour* of the expansion of their nearest airport and 20% were *against*.

6.8 This is an increase in support for local airport expansion relative to the 2010 survey (41% in favour and 25% against) and is similar to the level of support seen in the 2006 survey.

Figure 14: Attitudes towards expansion of nearest airport, 2006-2014



Source: March 2014 ONS Opinions and Lifestyle Survey. Base number = 1,018 (All respondents).

6.9 The proportion in favour of expansion was similar for respondents living in London and the South East (46%) and the rest of Great Britain (48%).

6.10 When asked what advantages they thought airport expansion might bring to the local area, the most commonly mentioned advantages were *increased job opportunities* (mentioned by 35%), *improved local economy* (29%) and *greater availability of destinations* (19%). Over a third respondents (36%) thought there would be no advantages.

6.11 The most commonly mentioned disadvantages were *more noise from flights* (33%), *more congestion on roads* (28%) and *pollution* (27%). Over a third (37%) did not think there were any disadvantages.

6.12 Those living closer to airports were more likely to mention the disadvantages of airport expansion, in terms of noise, pollution and congestion but were also more likely to mention increased job opportunities.

6.13 The advantages and disadvantages raised in 2014 were similar to those raised in 2010.

Detailed statistical tables with a breakdown by sub-groups (age, gender, income etc) and overall time series:

- Tables ATT0619 and ATT0626 to ATT0631

Survey design details

The **Office for National Statistics' Opinions and Lifestyle Survey** is a random probability survey of adults aged 16 and over living in private households in Great Britain. The March 2014 Opinions and Lifestyle Survey interviewed 1,038 adults face-to-face in their own homes during the month of March. The response rate was 56%. The questions asked can be found at Annex B.

The May 2008 Omnibus Survey interviewed 1,047 adults and the response rate was 57%. In May 2006, 1,298 adults were interviewed and the response rate was 71%. In February 2010, 1,005 adults were interviewed and the response rate was 55%.

The results presented in this report are weighted. The weighting ensures distribution across regions and age-sex groups match the Great Britain population. The survey results are subject to sampling error. That is the results obtained may differ from those that would be obtained if the entire population had been interviewed, or another sample selected. Statistical theory enables us to calculate the degree of sampling error for any estimate.

Significant differences over time or between groups which are referred to in the text are statistically significant at the 5% level (i.e. it is 95 per cent certain that the difference exists in the population).

Figures quoted in the text, tables and charts have been rounded to the nearest final digit so, in some cases, there may be an apparent discrepancy between the sum of the constituent items and the totals shown.

Further information and detailed statistics are published on the DfT website including:

- Detailed statistical tables including full breakdowns by sub-groups and trends over time. Individual tables are referenced at relevant points in the text.
- A copy of the survey questionnaire is available in Annex B
- A full report on the previous February 2010 module