

## Departure to Arrival - the Air Experience - UK - August 2010

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### What is this report about?

Mintel's exclusive consumer research shows that passengers are more likely to be happy with their air experience than not – even on those airlines most-often criticised in these terms. This report goes on to examine which non-flight factors are most important to consumers, which are their onboard priorities and what they look for in onboard entertainment. It also reveals which airlines rank most highly in consumers' minds in terms of the air experience they provide.

In addition, the report examines the number of passengers uplifted in the UK (both flying internationally and on domestic flights) and forecasts the market to 2015. It considers airline use, the impact of the recession and the Eyjafjallajökull volcano, the key demographic factors and consumer trends, air travel's competitive context and provides target analysis of consumers.

### What have we found out?

- Prompt departure/arrival is a key issue for airline users – one in three rank this as the most important 'not in flight' factor of a good air experience. Second-ranked is the desire for a decent hand luggage allowance, with this option far more likely (at a ratio of two to one) to be chosen by women.
- Onboard, approximately one in six fliers wants some form of onboard entertainment above all else – this is particularly important to people with children and those on long-haul journeys. Willingness to pay for something to keep children occupied rises to almost one in three adults from five-person households, up from one in 14 singles.
- The cost of food/drink onboard (ie when it is not included in the ticket price) is a concern for many – almost eight in ten fliers believe that it is too expensive. Onboard catering (when food is included) receives a mixed response. Between one-third and four in ten fliers agree that this food/drink is generally good quality – however almost one in five disagrees and four in ten neither agree nor disagree.
- Two in five think that airlines could do more to make check-in faster. And the older fliers are, the more likely they are to agree – three in four of those aged 55-plus do so, for example.
- At the other end of the age range, younger fliers are the most likely to agree that price is the most important thing in choosing an airline. In fact, the younger the traveller, the more likely they are to believe this.
- Overall, fliers are far more likely to enjoy rather than dislike the air experience of a given airline. The best regarded are the long-haul, full-service airlines (eg Emirates, Virgin, Singapore); those that score lowest are the most used low-cost operators. UK regional airlines punch above their weight, aided by the advantages that running small operations bring.

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