



Public Attitudes and Awareness of Airline Passenger Protection

AIRPORT SURVEY EXECUTIVE SUMMARY

Submitted to:

Canadian Transportation Agency

EKOS RESEARCH ASSOCIATES INC.

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EKOS RESEARCH ASSOCIATES

Ottawa Office

359 Kent Street, Suite 300

Ottawa, Ontario

K2P 0R6

Tel: (613) 235 7215

Fax: (613) 235 8498

E-mail: pobox@ekos.com

www.ekos.com

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Executive Summary

Background and Methodology

The Canadian Transportation Agency (CTA) has three core mandates: helping to keep the national transportation system running efficiently and smoothly, protecting the fundamental right of persons with disabilities to accessible transportation services, and providing consumer protection for air passengers. The successful development of effective regulations is contingent on obtaining the views and concerns of the public on their travelling experience.

The CTA contracted Advitek to collect quantitative data through its specialized software from travellers at a number of airports across Canada. EKOS was responsible for analyzing the data and producing a summary report of findings from this survey.

Survey Findings

COMMUNICATION WITH PASSENGERS

Results reveal that airline passengers place a high degree of importance on the information they receive while travelling by air. Nearly all respondents (96 per cent) say it is important that they are kept informed about what to do if they experience a problem, while just under nine in ten (86 per cent) assign a great deal of importance on being notified of the airline's obligations to passengers. Three-quarters (77 per cent) say it is important that they are apprised of how best to file a complaint.

Email and airline-issued documents consistently rank as preferred channels for receiving this information, although respondents are also receptive to receiving communication through texts and smartphone applications. Airline websites are seen as an important tool when it comes to filing complaints, but their perceived usefulness diminishes when it comes to other forms of information. Airport signage and airport announcements consistently rank as lower-tier preferences.

Results further reveal a strong preference for receiving information about air travel as early as possible. About nine in ten respondents (93 per cent) say it is important they receive information as soon as they encounter a problem. Three-quarters (74 per cent) place a high level of importance on receiving information at the time their reservation is made, while seven in ten wish to receive information at the airport's check-in kiosk (70 per cent) or prior to purchasing their ticket (69 per cent).

BAGGAGE ISSUES

Most airline passengers are aware that airlines can be held liable for lost, delayed, or damaged baggage, although a significant minority – 27 per cent – are not. Compensation for lost or damaged baggage is a near-universal expectation. Virtually all respondents (97 per cent) say it is important that airlines provide payment commensurate to the value of the baggage, while more than nine in ten (94 per cent) place a high degree of importance on having their baggage fees refunded.

DELAYS AND CANCELLATIONS

Respondents place a high degree of importance on various forms of assistance in the event of a flight delay, particularly re-bookings within a reasonable time frame (97 per cent), overnight accommodations (96 per cent), regular status updates (95 per cent), refund tickets (91 per cent), and free access to communication such as Wi-Fi (86 per cent). Food vouchers are seen as comparatively less important (76 per cent).

Respondents also place a great deal of importance on compensation for delayed flights, particularly complimentary tickets (84 per cent), cash payments (77 per cent), travel vouchers (73 per cent), and flight upgrades (70 per cent). Nine in ten (92 per cent) believe it is reasonable for airlines to offer passengers a choice between a cash payment and other forms of compensation.

Results reveal that airline passengers expect a broad array of services when they are left waiting on board an aircraft that is sitting on the tarmac for more than three hours, particularly functioning washrooms (97 per cent), adequate ventilation (96 per cent), adequate water (96 per cent), regular status updates (95 per cent), medical attention (93 per cent), access to communications (91 per cent), adequate food (88 per cent), and the ability to get off the plane (84 per cent). Weather updates and local news are seen as comparatively lesser priorities (55 per cent and 44 per cent, respectively).

Respondents were asked what they would consider to be fair compensation in the event they that their flight is delayed or cancelled. Expectations are generally low for delays of two hours or less, with respondents suggesting an average cash figure of \$143. Respondents also recommended an average of \$330 for delays of two to six hours, and \$636 for delays of six hours or more. Expectations regarding compensation are noticeably higher when it comes to being denied boarding due to overbooking, with recommendations ranging from \$220 for a delay of two hours or less to \$825 for a delay of six hours or more. Nearly all suggestions for compensation took the form of cash, with most respondents suggesting the cost of the ticket, a fixed cash amount, or a cash payment proportionate to the cost of the flight.

SEATING ARRANGEMENTS FOR MINORS

Not surprisingly, views on how far children should be seated from their parents vary heavily depending on the age of the child. The vast majority (86 per cent) say that a child under five years of age should be seated either directly adjacent to a parent or guardian or within one seat. Similarly, three-quarters (76 per cent) say children ages six to eleven should be kept within one seat of their parents, although 22 per cent are open to a two-seat separation or a same-row requirement.

Respondents would grant considerably more flexibility when the child is 12 to 14 years of age. Just one-quarter (27 per cent) believe the child should be required to sit adjacent to a guardian, while a similar proportion (22 per cent) believe the seating gap should be limited to one seat. One in six would approve of a two-seat separation (16 per cent), same-row seating (18 per cent), or a three-row limit (16 per cent).

Background and Methodology

Background

The Canadian Transportation Agency (CTA) is an independent, quasi-judicial tribunal and regulator that has, with respect to all matters necessary for the exercise of its jurisdiction, all the powers of a superior court. The CTA has three core mandates: helping to keep the national transportation system running efficiently and smoothly, protecting the fundamental right of persons with disabilities to accessible transportation services, and providing consumer protection for air passengers.

Based on the regulation making authority provided in Bill C-49, otherwise known as the *Transportation Modernization Act*, the CTA has been tasked with establishing new regulations to strengthen Air Passenger Rights.

The successful development of effective regulations is contingent on obtaining the views and concerns of the public on their travelling experience.

Methodology

As part of this initiative, the CTA contracted Advitek to collect quantitative data through its specialized software from travellers at the following select airports:

- Toronto
- Montreal
- Halifax
- Winnipeg
- Ottawa
- Vancouver
- Calgary
- St. John's NL
- Québec City
- Saskatoon
- Yellowknife

Through its specialized software, Advitek collected and compiled the data of more than 900 respondents in airports and provided the CTA with an SPSS file, data tables, and a methodology report.

EKOS was responsible for analyzing the data and producing a summary report of survey findings.

Detailed Results

Importance of information

Results reveal that airline passengers place a high degree of importance on the information they receive while travelling by air. Nearly all respondents (96 per cent) say it is important that they are kept informed about what to do if they experience a problem, while just under nine in ten (86 per cent) assign a great deal of importance on being notified of the airline's obligations to passengers. Three-quarters (77 per cent) say it is important that they are apprised of how best to file a complaint. Very few respondents (five per cent or less) rated these issues as unimportant.

Importance of information

Q. When you are travelling, how important to you is it to receive information on the following?

What to do if you have a problem



Airline's obligations to the passengers



How to make a complaint



- Not important (1-2)
- Somewhat important (3)
- Important (4-5)

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BASE: Airline passengers; n=930

Respondents were also asked, unprompted, whether there are other forms of information they would consider to be important. In all, 198 respondents provided suggestions. The bulk of these responses centered on information related to delays and cancellations, with some respondents clarifying that they are interested in learning more about compensation or the reasons behind the delays. A number of respondents also mentioned baggage, with some of the respondents specifying information regarding lost baggage or baggage allowances. A few respondents also mentioned information related to safety and security.

Preferred medium of communication

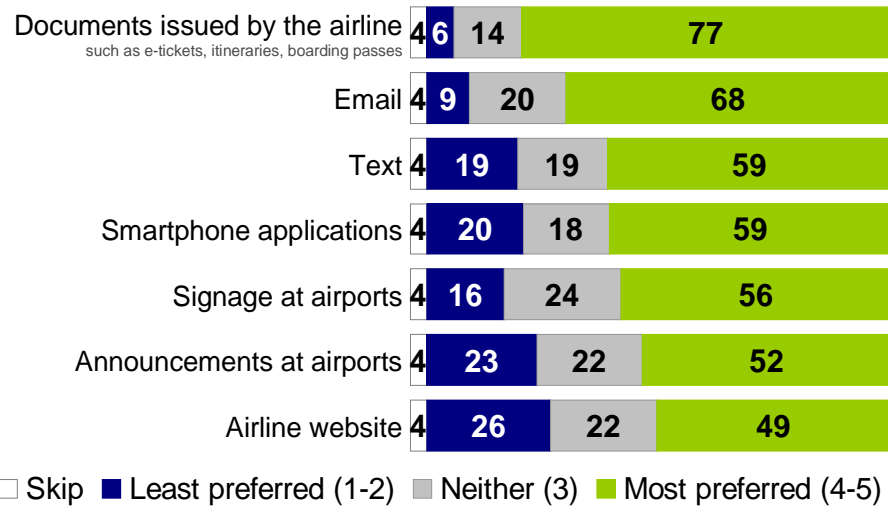
In this section, respondents were presented with three types of information – airline's obligations to passengers, what to do in the event of a problem, and how to file a complaint – and asked to identify the media through which they would prefer to receive this information.

Airline's obligations to passengers

When it comes to being informed of an airline's obligations to its passengers, three-quarters of respondents (77 per cent) indicated a strong preference for including the information in documents issued by the airline. Two-thirds (68 per cent) would like to receive the information by e-mail, while roughly six in ten rate texts (59 per cent), smartphone applications (59 per cent), and airport signage (56 per cent) as important channels. Half would like to receive information via airport announcements (52 per cent) or through the airline's website (49 per cent).

Preferred medium of communication: Airline's obligations to the passengers

Q. How would you prefer to receive information about the airline's obligations?



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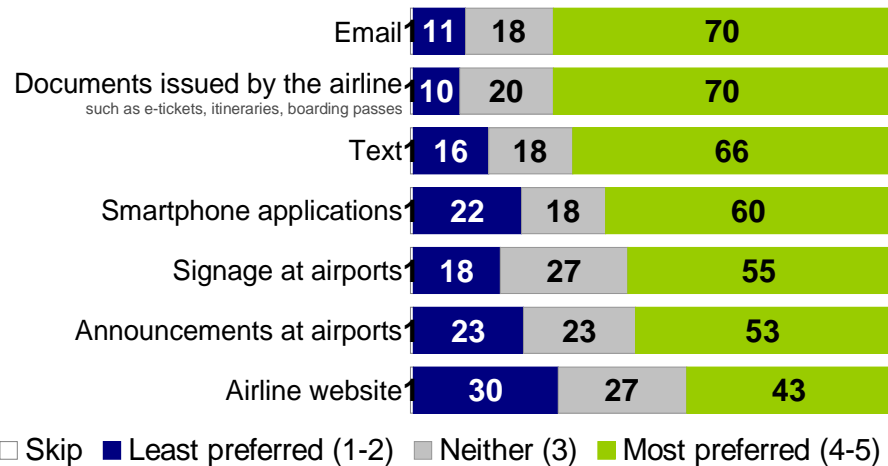
BASE: Airline passengers; n=930

What to do in the event of a problem

When asked about guidelines for how to act in the event of a problem, respondents provided a similar rank ordering in terms of the media through which they would prefer to receive the information. Roughly seven in ten expressed a strong preference for receiving the information through e-mail (70 per cent), documents issued by the airline (70 per cent), and texts (66 per cent). Six in ten (60 per cent) say the information should be communicated through smartphone applications, while just over half would prefer by airport signage (55 per cent) or airport announcements (53 per cent). Fewer than half of respondents (43 per cent) indicated a strong preference for seeking the information on the airline's website.

Preferred medium of communication: What to do in the event of a problem

Q. How would you prefer to receive information about what to do if you have a problem (e.g. flight disruption, lost baggage etc.)?



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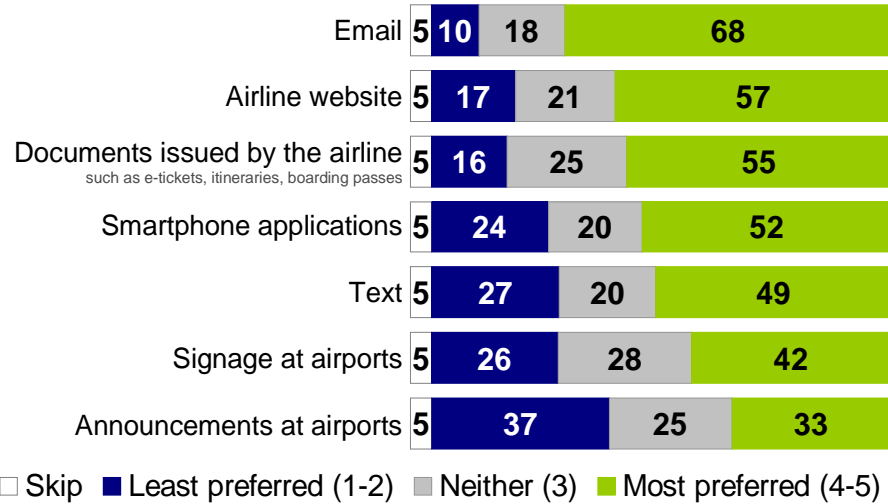
BASE: Airline passengers; n=930

How to make a complaint

Turning to information regarding how to file complaints, email again ranks as the most strongly preferred medium (68 per cent). In contrast to other forms of information, however, the airline's website also finds itself near the top, with 57 per cent rating this medium as a top choice. Just over half indicated a strong preference for receiving the information through documents issued by airline (55 per cent) or smartphone applications (52 per cent), while slightly fewer (49 per cent) would like to receive the information by text. Four in ten (42 per cent) would want this information conveyed by airport signage. Just one in three (33 per cent) would like information about how to file a complaint communicated by announcements at airports, while the plurality – 37 per cent – would prefer not to receive the information in this manner.

Preferred medium of communication: How to make a complaint

Q. How would you prefer to receive information about how to make a complaint?



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BASE: Airline passengers; n=930

Other media

For each of the three types of information, respondents were asked, unprompted, whether there are other means through which they would prefer to be reached. Between 19 and 26 respondents offered suggestions, with most recommending telephone or in-person communication.

Importance of timing of information

Results reveal a strong preference for receiving information about air travel as early as possible. About nine in ten (93 per cent) say it is important they receive information as soon as they encounter a problem. Three-quarters (74 per cent) place a high level of importance on receiving information at the time their reservation is made, while seven in ten wish to receive information at the airport's check-in kiosk (70 per cent) or prior to purchasing their ticket (69 per cent).

Importance of timing of information

Q. How important to you is the timing of when this information is communicated to you?

As soon as you encounter a problem



At the time of reservation



At the airport's check-in kiosks



Prior to purchasing your ticket



■ Not important (1-2) ■ Somewhat important (3) ■ Important (4-5)

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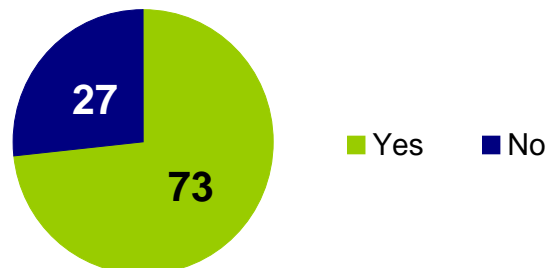
BASE: Airline passengers; n=930

Awareness of airline liability for baggage

Three-quarters of respondents (73 per cent) indicated that they are aware that airlines can be held liable for lost, delayed, or damaged baggage. However, a significant minority – 27 per cent – say they were not aware of airlines' responsibilities in this case.

Awareness of airline liability for baggage

Q. Did you know that airlines can be held liable and required to pay damages when your baggage is lost, delayed or damaged?



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BASE: Airline passengers; n=930

Importance of compensation for baggage

Results reveal that compensation for lost or damaged baggage is a near-universal expectation. Virtually all respondents (97 per cent) say it is important that airlines provide payment commensurate to the value of the baggage, while more than nine in ten (94 per cent) place a high degree of importance on having their baggage fees refunded. Virtually no respondents (one per cent) say these forms of recompense are of little importance.

Importance of compensation for baggage

Q. If your bag is lost or damaged, how important to you is each of the following solutions?

Payment reflective of the financial loss incurred



Refund of any fee already paid



- Not important (1-2)
- Somewhat important (3)
- Important (4-5)

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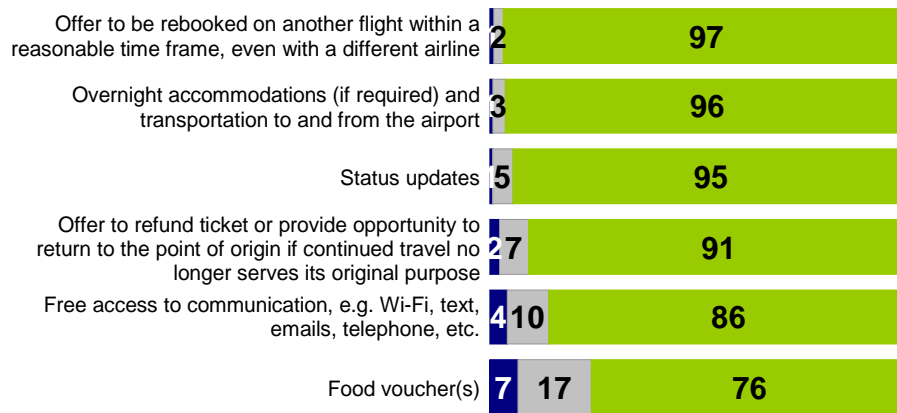
BASE: Airline passengers; n=930

Importance of assistance during delays

Respondents were asked to rate the importance of various forms of assistance provided by airlines in the event of a delay of two hours or less. Nearly all place a high degree of importance on being rebooked on another flight within a reasonable time frame (97 per cent), overnight accommodations (96 per cent), and regular status updates (95 per cent). Nine in ten (91 per cent) say it is important that they are offered a refund ticket or provided the opportunity to return to their point of origin, while a similar proportion (86 per cent) prioritize free access to communication (such as Wi-Fi). Food vouchers are seen as comparatively less important, although a clear majority – 76 per cent – rank them as a key form of assistance. Very few respondents (one to seven per cent) rated any of these options as unimportant

Importance of assistance during delays

Q. In the event of a delay and you arrive at your final destination later than expected, how important are the following types of assistance for a delay of 0-2 hours?



■ Not important (1-2) ■ Somewhat important (3) ■ Important (4-5)

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BASE: Airline passengers; n=930

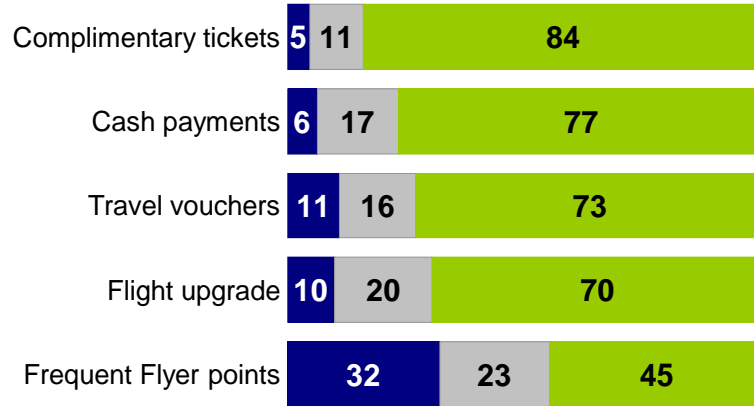
Respondents were also asked, unprompted, whether there are other forms of assistance they would deem important in the event of a delay. Just 32 respondents provided suggestions, with the bulk of these responses centered on compensation issues, rather than assistance. A handful did, however, convey the need to have professional airline staff on hand to assist passengers.

Importance of various forms of compensation

Respondents were presented with a list of five potential types of compensation for flights that have been delayed or cancelled and asked to rate the importance of each one. More than eight in ten (84 per cent) assign a high degree of importance to receiving complimentary tickets. Three-quarters say it is important that airlines offer cash payments (77 per cent) and travel vouchers (73 per cent), while seven in ten (70 per cent) place a high level of importance on flight upgrades. Just five to 11 per cent of respondents rate the importance of these forms of compensation as low.

Frequent flyer points rank significantly lower as a type of compensation for delayed or cancelled flights. Just under half of respondents (45 per cent) rate these programs as important, while one-third (32 per cent) say they are of little importance.

compensation for inconvenience when your flight is delayed, cancelled or if you are denied boarding?



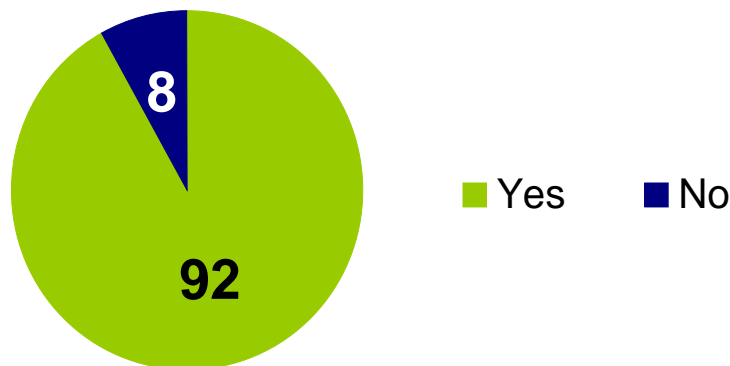
■ Not important (1-2) ■ Somewhat important (3) ■ Important (4-5)

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BASE: Airline passengers; n=930

Perceived fairness of alternative forms of compensation

Results reveal broad agreement with the idea of offering passengers alternative forms of compensation. Fully nine in ten respondents (92 per cent) believe that it is reasonable for airlines to offer passengers a choice between a cash payment and other forms of compensation. Just eight per cent disagree with this notion.



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BASE: Airline passengers; n=930

Preferred level of compensation

FLIGHT DELAYS AND CANCELLATIONS

Respondents were asked, unprompted, what they would consider to be a fair level of compensation in the event their flight is delayed or cancelled. Results reveal relatively limited expectations when it comes to delays of two hours or less, with roughly one-quarter of respondents suggesting that no compensation is necessary. The vast majority suggested compensation ranging from \$0 to \$300. The average response was \$143.

Nearly all respondents expect some form of compensation when it comes to delays of two to six hours, with the vast majority providing figures of \$50 to \$600. The average response was \$330. Similarly, when it comes to delays of six hours or more, respondents suggested an average figure of \$636, with most responses ranging from \$175 to \$1,000.

Table 2-1: Amount of compensation: flight delays and cancellations

In the event that you arrive at your final destination later than expected, what do you think is fair compensation for your inconvenience when the cancellation or delay is within the airline's control?

Length of delay	Amount (average)
0-2 hours	\$143
2-6 hours	\$330
6+ hours	\$636

BASE: Airline passengers; n=930

Note: Two individuals' responses were removed from this analysis, as the figures they provided skewed the averages. For instance, one individual cited \$10,000,000 as fair compensation for a delay of six hours or more.

Respondents were also asked, unprompted, what they would consider to be fair compensation in the event their flight was cancelled and they were offered a refund. Most suggested either a full refund or the cost of their ticket. About one-quarter of respondents suggested a fixed cash amount, with figures ranging from \$50 to \$2,000. Many others suggested an undetermined amount of cash, or payment proportionate to the value of the ticket (for example, a number of respondents suggested that the airline pay twice the value of the flight). Some suggested a free flight to their destination or travel vouchers, and a number of others stressed that they be compensated for any expenses incurred as a result of the cancellation (such as meals and hotel rooms).

DENIED BOARDING

Respondents were also asked, unprompted, what they would consider to be a fair level of compensation in the event they are denied boarding due to overbooking. Results reveal that expectations regarding compensation are noticeably higher when it comes to being denied boarding rather than cancellations, even when the delays are similar. With regards to delays of zero to two hours, most respondents suggested compensation ranging from \$0 to \$500, while the average response was \$220. Turning to delays of two to six hours, the average response was \$454 with the vast majority providing figures of \$100 to \$800. Delays of six hours or more yielded an average suggestion of \$825, with most responses ranging from \$200 to \$1,210.

Table 2-2: Amount of compensation: denied boarding

In the event that you are denied boarding (bumped due to overbooking), what amount of compensation do you think is fair when the delay is within the airline's control?

Length of delay	Amount (average)
0-2 hours	\$220
2-6 hours	\$454
6+ hours	\$825

BASE: Airline passengers; n=930

Respondents were also asked, unprompted, what they would consider to be fair compensation in the event that they were denied boarding and offered a refund. Responses generally mirrored those of the previous section, with the bulk of responses centered on a refund, the cost of the ticket, or a set cash amount, although many respondents increased their previous suggestions. For example, in cases where respondents provided specific cash figures, suggestions were, on average, \$80 higher when compared to flight cancellations. Similarly, many respondents who had suggested a cash payment proportionate to the value of the ticket advocated a higher percentage. Some respondents also recommended free flights, travel vouchers, and compensation for any additional expenses.

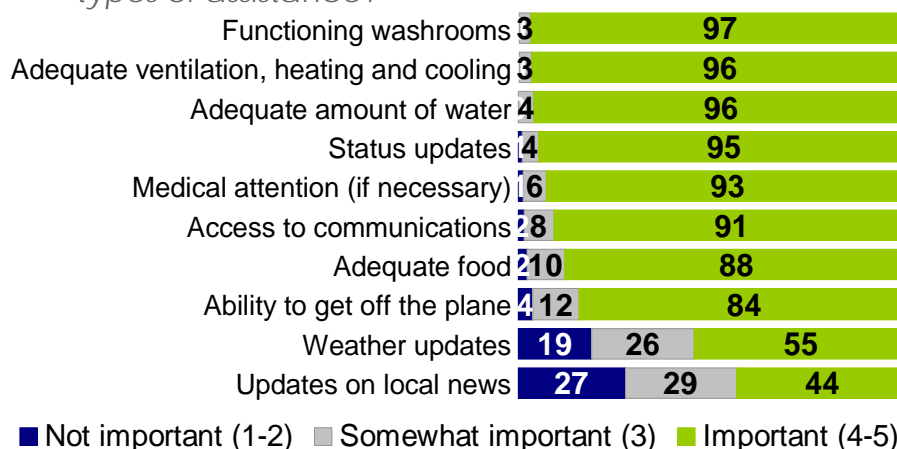
Importance of various forms of assistance

Results reveal that airline passengers expect a broad array of services when they are left waiting on board an aircraft that is sitting on the tarmac for more than three hours. Virtually all respondents say it is important that airlines provide functioning washrooms (97 per cent), adequate ventilation (96 per cent), adequate water (96 per cent), and regular status updates (95 per cent). About nine in ten assign a high level of importance to providing necessary medical attention (93 per cent), access to communications (91 per cent), and adequate food (88 per cent), while slightly fewer (84 per cent) rate the ability to get off the plane as a top priority. Very few respondents (four per cent or less) see these measures as unimportant.

Weather updates are seen as a comparatively lesser priority, with just over half (55 per cent) rating it as important (compared to 19 per cent who assign a low degree of importance). Similarly, updates on local news are ranked as important by 44 per cent of respondents, while one-quarter (27 per cent) see this service as unimportant.

Importance of various forms of assistance

Q. In the event that you are waiting onboard an aircraft that is sitting on the tarmac (landing area) for more than three hours, how important are the following types of assistance?



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BASE: Airline passengers; n=930

Best placement of children relative to parents

Respondents were asked what they would consider to be an ideal range in terms of how far children should be seated from their parents on an aircraft. Not surprisingly, results vary heavily depending on the age of the child. Eight in ten (79 per cent) say that a child under five years of age should be seated directly adjacent to a guardian, while an additional seven per cent say the child should be placed within one seat. One per cent say a distance of up to two seats should be allowed, and 12 per cent believe that seating the child in same row as a guardian would be adequate. Virtually no respondents (one per cent) would consider a gap of up to three rows to be acceptable.

Respondents also express a strong preference for keeping children ages six to eleven within close proximity to their parents, although they are more likely to suggest that there should be some flexibility in the matter. About six in ten (57 per cent) maintain that the child should sit in an adjacent seat, although one in five (19 per cent) are open to a one-seat separation. Six per cent are open to a gap of up to two seats, while one in six (16 per cent) believe that keeping the child in the same row as their guardian is sufficient. Again, virtually no respondents (two per cent) would support allowing a distance of up to three rows.

Respondents would grant considerably more latitude when the child is twelve to fourteen years of age. Just one-quarter (27 per cent) believe the child should be required to sit adjacent to a guardian, while a similar proportion (22 per cent) believe the seating gap should be limited to one seat. One in six would approve of a two-seat separation (16 per cent), same-row seating (18 per cent), or a three-row limit (16 per cent).