



CTA Air Passenger Satisfaction Survey

Final Report

Prepared for the Canadian Transportation Agency

Supplier: EKOS RESEARCH ASSOCIATES INC.

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For more information on this report, please contact the Canadian Transportation Agency at:

info@otc-cta.g.ca.

Ce rapport est aussi disponible en français

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This public opinion research report presents the results of an online survey conducted by EKOS Research Associates Inc. on behalf of the Canadian Transportation Agency. The research study was conducted with 2,065 Canadian air travellers between January 25 and February 6, 2024.

Cette publication est aussi disponible en français sous le titre .

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SUMMARY

A. BACKGROUND AND OBJECTIVES

The Canadian Transportation Agency (CTA) is an independent regulator and quasi-judicial tribunal with the powers of a superior court. It operates within the context of the very large and complex Canadian transportation system.

The CTA has three core mandates:

- To help ensure that the national transportation system runs efficiently and smoothly in the interests of all Canadians: those who work and invest in it; the producers, shippers, travellers, and businesses who rely on it; and the communities where it operates;
- To protect the human right of persons with disabilities to an accessible transportation network; and
- To provide consumer protection for air passengers.

The research will provide a greater understanding of Canadian air traveller opinions on their air travel experience.

The target population for the survey was Canadian air travellers over the age of 18 who have travelled by air in the past five years.

B. METHODOLOGY

The research involved an online survey of 2,065 Canadians 18 years of age and older who have travelled by air since 2019. The survey was conducted across Canada in both official languages. The field dates for the survey were January 25-February 6, 2024.

All survey results were weighted by region, age, and gender according to Statistics Canada data to ensure that the results were representative of the Canadian public. The margin of error for a survey of n=2,065 is +/- 2.2 percentage points 19 times out of 20.

Appendix A contains a detailed description of the methodology used in this study.
Appendix B contains the full survey questionnaire.

C. KEY FINDINGS

Outlined below are key findings from the study. The remainder of this report describes results in more detail.

Frequency of Air Travel

Respondents were first asked how often they have flown within Canada and internationally in the past five years. The plurality of Canadians say they have flown 1-2 times over this timeframe, both within Canada (34%) and internationally (38%). About one in five say they have flown six times or more domestically (23%) or internationally (17%) over the past five years.

Passenger Experience

Results reveal general satisfaction with air travel. When asked how satisfied they were with their most recent air travel experience, three in four (75%) said they were satisfied, and only 12% said they were not satisfied.

When asked, unprompted, what improvements or changes they would suggest to airlines or airports to enhance passengers' air travel experience, a wide range of suggestions were provided. Fourteen percent indicated they would like to see improvements to seating (seats too small, no legroom), 12% indicated they would like to see more reliable flights (avoid delays/cancellations/changes to itinerary), and 11% mentioned ticket prices (stop overcharging, too many extra charges).

Air travellers were asked to rate the clarity of the information provided about their most recent flight. Results reveal that the vast majority (93%) felt the travel itinerary was clear, and eight in ten (78%) felt that seating information and fees were clear. Two-thirds (68%) felt the terms and conditions of the ticket were clear, and just over half (52%) felt the same way about the rules for refunds. However, only about four in ten felt other fees or charges (46%) or rebooking fees (43%) were clearly communicated.

Respondents were also asked about their confidence in air travel the next time they fly. Most Canadians (59%) express confidence that they will have a positive travel experience the next time they travel by air but are much less confident that the airline will provide them with a satisfactory solution if there is a problem with their flight: only 29% express confidence that they will receive a satisfactory solution in the event of a problem.

Airline Handling of Passenger Complaints

Findings reveal that many Canadian air travellers have experienced an air travel disruption that resulted in a delay of more than two hours: 53% indicated this had occurred in the past five years, and fewer than half (45%) said they had not encountered an air travel disruption lasting more than two hours in the past five years.

Those who indicated they had experienced a flight disruption of more than two hours were asked if the airline provided them with needed information and assistance during the disruption. Just over half of these respondents (52%) indicated they were informed frequently as to the status of their flight, but only four in ten (40%) felt the airline provided needed information in a clear and timely manner. Very few indicated that the airline provided them with assistance during the delay in the form of food or drink (28%) or information about compensation for the delay (11%).

All respondents were asked in the event of a flight disruption, such as a delay, cancellation or denial of boarding, if they were aware of their rights with respect to the disruption. Results reveal that most Canadian air travellers are unaware of their rights in the event of a flight disruption: fewer than half indicated awareness of their right to assistance in the form of food, drink and accommodation (41%), rebooking (40%), compensation for inconvenience due to the disruption (39%), or refund (31%).

Results suggest that few Canadian air travellers have submitted a claim or complaint with an airline in the past five years about a flight disruption (17%) or lost or damaged baggage (13%).

Among those who indicated they submitted a claim or complaint with an airline, only four in ten felt the airline staff were helpful in resolving the complaint (43%), and even fewer felt the airline provided them with the information they needed in a clear, concise and timely manner (31%), or informed them of their air passenger rights (18%).

Fewer than four in ten (39%) of those who submitted a complaint with an airline express satisfaction with the resolution of the issue, and almost half (49%) indicate dissatisfaction with the resolution of their complaint.

Passenger Experience with the CTA

All respondents were asked if they were aware that Canada has consumer protections for air passengers. Three in four (72%) say they are aware of these protections, and only one in four (24%) say they are unaware.

Air travellers were also asked if they were aware that the Canadian Transportation Agency can resolve air travel complaints. Only about one in three (36%) say they know the CTA can resolve air travel complaints, while 58% say they are not aware of this.

When asked if they had filed a complaint with the Canadian Transportation Agency, only three percent of respondents indicated they had filed a complaint with the CTA; the vast majority (97%) had not.

Conclusions and Implications

Survey results reveal that Canadian air travellers are largely satisfied with their most recent travel experience and express reasonably high levels of confidence that they will have a positive experience the next time they travel by air. However, air travellers are far less confident there will be a satisfactory solution if there is a problem with a flight in the future.

Results also reveal that many Canadian air travellers have experienced a significant travel disruption in the past few years, and few of these respondents felt the airline provided them with needed information or assistance during the disruption. Moreover, most Canadian air travellers appear to be unaware of their rights in the event of a flight disruption.

Among those who submitted a complaint with an airline, few felt the airline provided them with information or assistance in resolving the complaint, and most of these air travellers were dissatisfied with the resolution of the complaint.

Findings also reveal that despite high claimed awareness of consumer protections for air passengers, few Canadians express awareness of the CTA's role in resolving air travel complaints, and very few have filed a complaint with the Agency.

D. CONTRACT VALUE

The contract value for the POR project is \$65,822.50 (including HST).

Supplier Name: EKOS Research Associates

PWGSC Contract Number: CW2332540

Contract Award Date: September 29, 2023

To obtain more information on this study, please e-mail

E. POLITICAL NEUTRALITY CERTIFICATION

I hereby certify as Senior Officer of EKOS Research Associates Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed by:



Derek Jansen (Vice President)

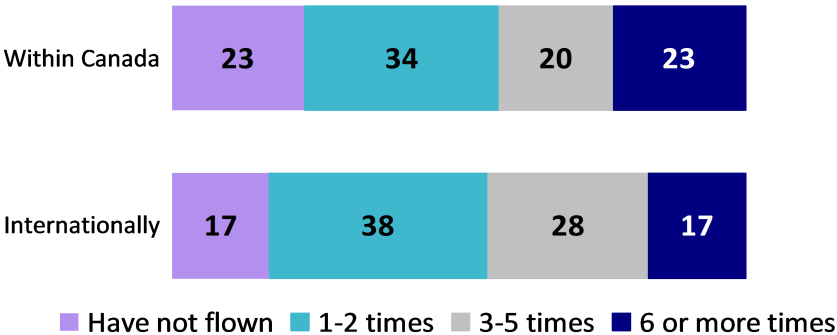
DETAILED FINDINGS

A. FREQUENCY OF AIR TRAVEL

Frequency of flying over the past five years

Respondents were first asked how often they have flown within Canada and internationally in the past five years. The plurality of Canadians say they have flown 1-2 times over this timeframe, both within Canada (34%) and internationally (38%). About one in five say they have flown six times or more domestically (23%) or internationally (17%) over the past five years. Those who indicated they had not flown either domestically or internationally within the past five years were screened out of the survey.

Chart 1: Frequency of flying over the past five years



Q1a-b. In the past five years, how often have you flown...?

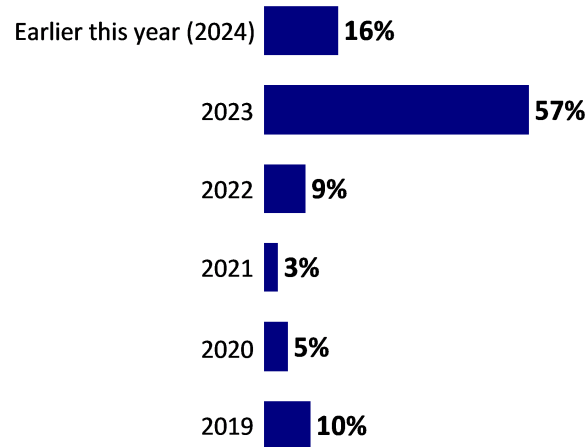
Base: n=2065

- Men, those with university education, and those earning \$150,000 or more in household income are more likely to have flown six times or more (both domestically and internationally) in the past five years.

Year flown over past five years

Results reveal that most respondents say they last travelled by air in 2023 (57%). Not surprisingly, very few say they last flew between 2020-2022, when the COVID-19 pandemic severely limited air travel in Canada and around the world.

Chart 2: Year flown over the past five years



Q2. When did you last travel by air?

Base: n=2065

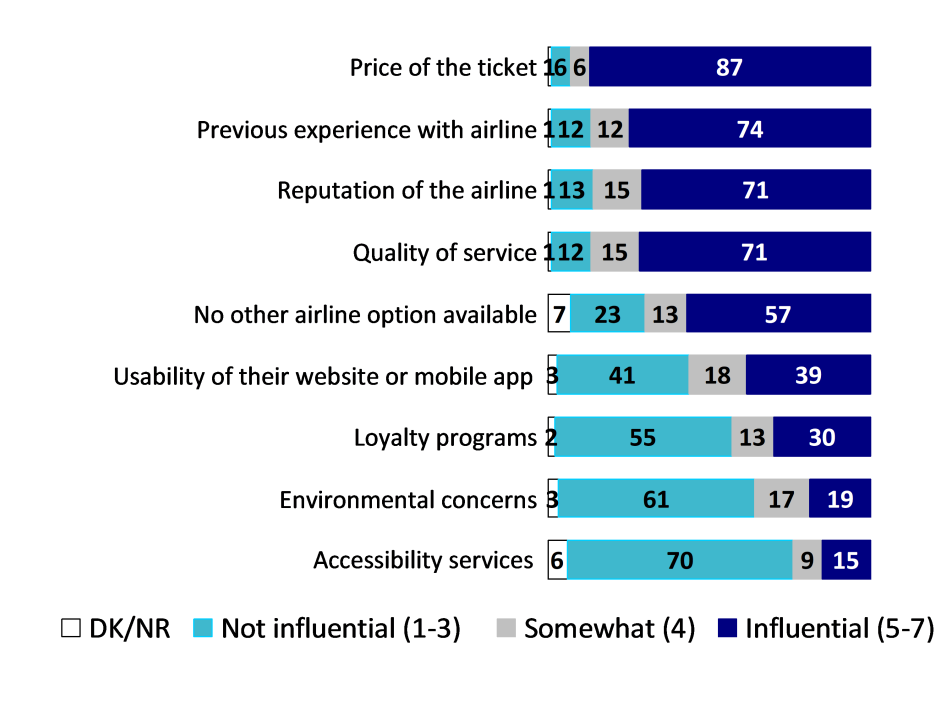
- Atlantic Province residents (63%), those with university education (59%), and those earning \$150,000 or more in household income (62%) are particularly likely to say they flew in 2023.

B. PASSENGER EXPERIENCE

Influences on air ticket purchase

Respondents were asked how a variety of aspects of air travel influences their decision-making when purchasing an airline ticket. Not surprisingly, the price of the ticket is rated as the most important (87%), but a number of other factors also strongly influence air travel decisions. Seven in ten feel that previous experience with the airline (74%), the reputation of the airline (71%), and the quality of service (71%) are important factors when making a decision about the purchase of an airline ticket.

Chart 3: Influences on air ticket purchase



Q3a-j. How does each of the following influence your decision when purchasing a ticket?

Base: n=2065

- Those under 35 years of age (93%) and those with a university education (91%) are particularly likely to say the price of the ticket strongly influences their purchase decision.
- Residents of Saskatchewan/Manitoba (83%) and those 55 years of age and older (80%) are particularly likely to say previous experience with the airline strongly influences their purchase decision.

- Those under 55 years of age (78%), women (74%), and those with a college education (74%) are more likely to say the reputation of the airline strongly influences their decision.
- Those indicating satisfaction with their most recent air travel experience and those expressing confidence that they will have a positive travel experience the next time they fly are particularly likely to mention reputation, quality of service, and previous experience as important considerations in their purchase decision.

Method of booking the most recent flight

Air travellers were also asked how they booked their most recent flight. Directly with the airline via a website was selected most often (52%), followed by a third-party service (20%) or a travel agent (16%).

Chart 4: Method of booking the most recent flight



Q4. How did you book your most recent flight? [Choose one]

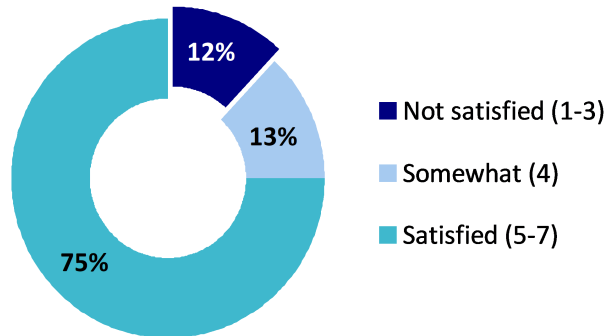
Base: n=2065

- BC residents (62%), those under 35 years of age (57%), and those with a university education (63%) are most likely to indicate they booked their most recent flight directly with the airline through a website.

Satisfaction with most recent air travel experience

Results reveal general satisfaction with air travel. When asked how satisfied they were with their most recent air travel experience, three in four (75%) said they were satisfied, and only 12% said they were not satisfied.

Chart 5: Satisfaction with most recent air travel experience



Q5. Overall, how satisfied are you with your most recent air travel experience?

Base: n=2065

- Quebec residents (82%), those with high school education (79%), those earning \$40,000-\$80,000 in household income (81%), those expressing confidence that they will have a positive travel experience the next time they fly (90%), and those satisfied with the resolution of a complaint to an airline (83%) are particularly likely to indicate satisfaction with their most recent air travel experience.

Improvements to enhance the air travel experience

Respondents were asked, unprompted, what improvements or changes they would suggest to airlines or airports to enhance passengers' air travel experience. A wide range of suggestions were provided, with 14% indicating they would like to see improvements to seating (seats too small, no legroom), 12% indicating they would like to see more reliable flights (avoid delays/cancellations/changes to itinerary), and 11% mentioning ticket prices (stop overcharging, too many extra charges).

Table 1: Improvements to enhance air travel experience

| Q6: What improvements or changes would you suggest to airlines or airports to enhance passengers' air travel experience? [OPEN] | Total (n=2065) |
|---|-----------------------|
| Seats are uncomfortable/too small, no leg room, too small for anyone, stop allowing people to recline their seats, stop charging for taller/obese passengers | 14% |
| Stop/avoid delays/cancellations, more reliable flight times, avoid changes to itinerary | 12% |
| Too expensive/stop price gouging, stop overcharging, need competition for competitive pricing, too many add ons/extra fees/tax not included in the price | 11% |
| Improve customer service (live agents available, kinder/friendlier staff, lack of respect, in-flight customers treated with disdain, especially when cancellations/delays/problems arise) | 8% |
| Meal/food options | 7% |
| Improve security screening/customs checkpoints processes | 6% |
| Improve communication (timely updates when flights are delayed/cancelled/gates changed, language barriers/bilingual service/better annunciation, intercom system is not clear/muffled sound, accommodate those without mobile service...) | 6% |
| Need more direct flights, more flight options/more airlines, better flight time options/varied departure times, more routes available | 4% |
| More staff on to deal with line ups/speed up processing, more staff needed to deal with issues/problems, more staff to deal with peak times/overnight (general) | 4% |
| Improve boarding procedures (start boarding from the back of the plane/window seats first, control lines/organization at the gate/enforcing boarding zone order, families/access needs boarding first, stop changing gates at the last minute...) | 4% |

| Q6: What improvements or changes would you suggest to airlines or airports to enhance passengers' air travel experience? [OPEN] | Total (n=2065) |
|--|-----------------------|
| Stop charging for luggage/allow 1st checked bag free, increase carry-on bags because people don't want to pay, reduce the cost of checking bags/too expensive/inconsistent charges throughout airports, charge for carry-on to address overhead space in the cabin | 4% |
| Enforcing carry-on bag requirements/restrictions, disorganization, and checking carry-on at the gate creates delays/confusion, ensure there is room for everyone in the overhead bin, inconsistent enforcement of rules/seems disorganized/arbitrary system | 4% |
| When delays/cancellations occur, offer better service/rebooking options and solutions | 3% |
| Stop losing luggage/damaging luggage, address theft/damage done when broken into, give proper compensation/service when it happens, deliver to customer free of charge, better tracking system/GPS tags, 'don't put luggage on separate flights than passenger | 3% |
| Check-in procedures improved/streamlined | 3% |
| Airport amenities improved | 3% |
| Improve airport design/layout | 3% |
| Health and safety issues on board | 3% |
| Improve compensation, give customers what they are owed when delayed/cancelled flights occur, simplify the process for compensation/resolution, delayed flight customers should be given adequate compensation/vouchers/accommodations | 3% |
| DK/NR | 13% |

Only results of 3% or more are shown in this table.

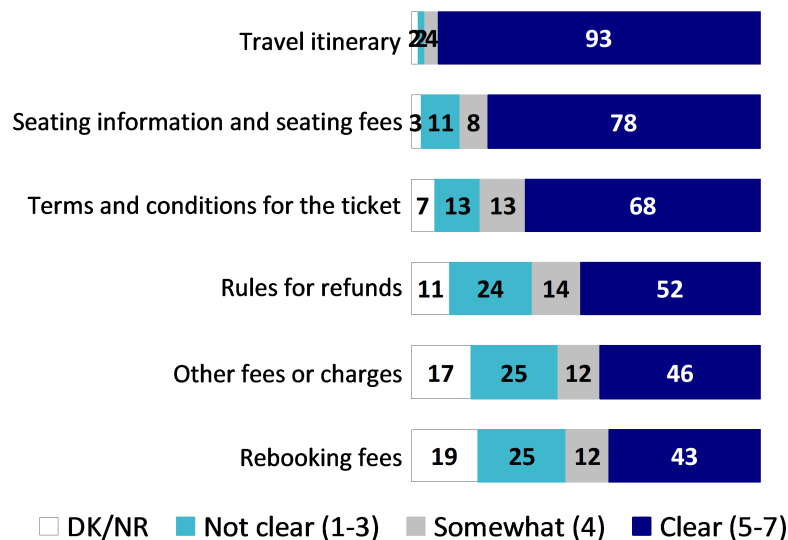
- Those with college education (17%), those earning \$40,000-\$80,000 in household income (17%), and those not confident they will have a positive travel experience in the future (18%) are particularly likely to mention seating issues.
- Atlantic Province residents (18%), those 65 years of age and older (15%), those not satisfied with their most recent air travel experience (24%), those not confident that they will have a positive travel experience the next time they fly (22%), and those not satisfied with the resolution of a complaint to an airline (19%) are particularly likely to mention more reliable flights.
- Atlantic Province residents (20%), those under 35 years of age (15%), those earning \$80,000-\$150,000 in household income (13%), those not satisfied with their most recent air travel experience (15%), those not confident that they will have a positive travel experience the

next time they fly (17%), and those not satisfied with the resolution of a complaint to an airline (15%) are most likely to mention price.

Clarity of air travel information

Air travellers were also asked to rate the clarity of the information provided about their most recent flight. Results reveal that the vast majority (93%) felt the travel itinerary was clear, and eight in ten (78%) felt that seating information and fees were clear. Two-thirds (68%) felt the terms and conditions of the ticket were clear, and just over half (52%) felt the same way about the rules for refunds. However, only about four in ten felt other fees or charges (46%) or rebooking fees (43%) were clearly communicated.

Chart 6: Clarity of air travel information



Q7a-f. When booking your most recent flight, how clear was the information provided to you about the following...?

Base: n=2065

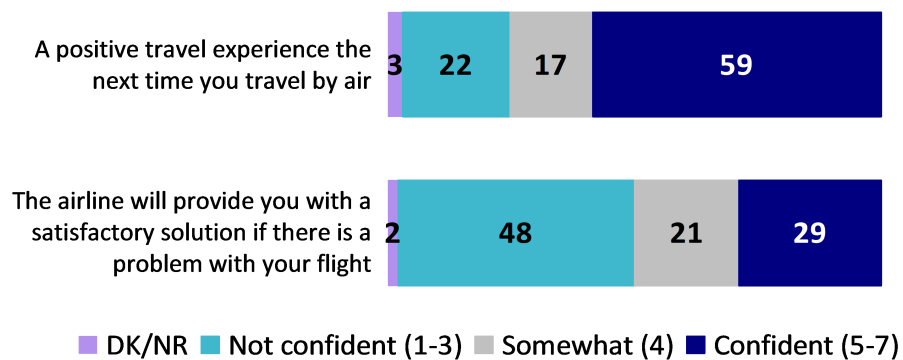
- Quebec residents (97%) and those earning \$150,000 or more in household income (96%) are particularly likely to feel the travel itinerary was clear.
- Those 65 years of age and older (82%), women (80%), those with a college education (81%), and those earning \$40,000-\$80,000 in household income (84%) are particularly likely to feel that seating information was clear.
- Residents of Saskatchewan/Manitoba (79%), those 65 years of age and older (80%), women (74%), those with a college education (72%), and those earning \$40,000-\$80,000 in household income (75%) are most likely to feel the terms and conditions of the ticket were clear.

- Those indicating satisfaction with their most recent air travel experience, those expressing confidence that they will have a positive travel experience the next time they fly, those satisfied with the resolution of a complaint to an airline, those who indicated they were aware that Canada has consumer protections for air passengers, and those who say they know the Canadian Transportation Agency can resolve air travel complaints are particularly likely to feel the information provided across all of these issues was clear.

Confidence in air travel

Respondents were also asked about their confidence in air travel the next time they fly. Results reveal that most Canadians (59%) express confidence that they will have a positive travel experience the next time they travel by air but are much less confident that the airline will provide them with a satisfactory solution if there is a problem with their flight: only 29% express confidence that they will receive a satisfactory solution in the event of a problem.

Chart 7: Confidence in air travel



Q8. How confident are you that you will have...?

Q9. How confident are you that ...?

Base: n=2065

- Quebec residents (71%), those 65 years of age and older (62%), those earning \$40,000 - \$80,000 in household income (64%), those indicating satisfaction with their most recent air travel experience (71%), and those satisfied with the resolution of a complaint to an airline (71%) are particularly likely to express confidence they will have a positive experience the next time they travel.
- Quebec residents (37%), those 55 years of age and older (35%), those earning less than \$40,000 in household income (35%), those indicating satisfaction with their most recent air travel experience (36%), those expressing confidence that they will have a positive travel experience the next time they fly (45%), those satisfied with the resolution of a complaint to

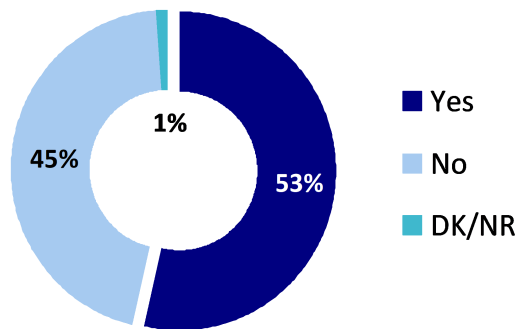
an airline (47%), and those who say they know the Canadian Transportation Agency can resolve air travel complaints (35%) are particularly likely to express confidence that the airline will provide them with a satisfactory solution if there is a problem with their flight.

C. AIRLINE HANDLING OF PASSENGER COMPLAINTS

Experience with air travel disruptions

Findings reveal that many Canadian air travellers have experienced an air travel disruption that resulted in a delay of more than two hours: 53% indicated this had occurred in the past five years, and fewer than half (45%) said they had not encountered an air travel disruption lasting more than two hours in the past five years.

Chart 8: Experience with air travel disruptions



Q10. Have you experienced an air travel disruption that resulted in a delay of more than two hours in the last five years?

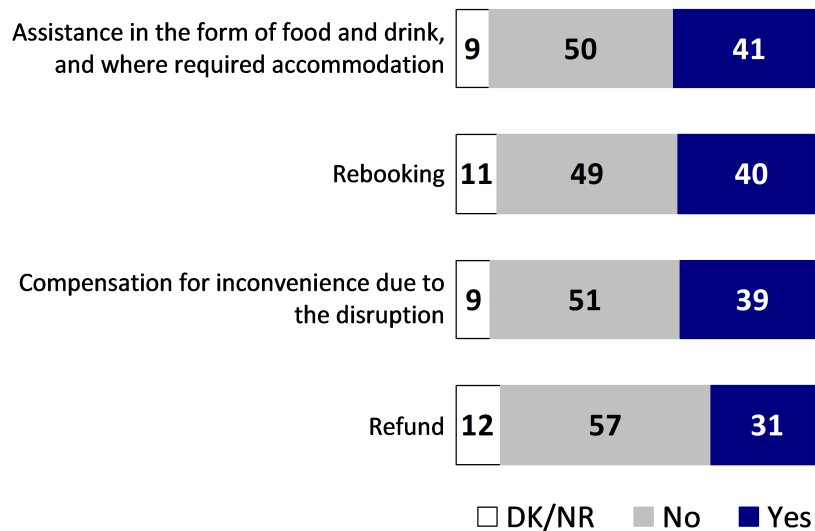
Base: n=2065

- Atlantic Province residents (64%), those under 35 years of age (59%), those with university education (59%), and those earning \$150,000 or more in household income (63%) are particularly likely to say they experienced an air travel disruption in the last five years.
- Those not satisfied with their most recent air travel experience (77%), those not confident that they will have a positive travel experience the next time they fly (69%), and those not satisfied with the resolution of a complaint to an airline (86%) are also more likely to say they experienced an air travel disruption in the last five years.

Awareness of rights in the event of a flight disruption

Respondents were also asked in the event of a flight disruption, such as a delay, cancellation or denial of boarding, were they aware of their rights with respect to the disruption. Results reveal that most Canadian air travellers are unaware of their rights in the event of a flight disruption: fewer than half indicated awareness of their right to assistance in the form of food, drink and accommodation (41%), rebooking (40%), compensation for inconvenience due to the disruption (39%), or refund (31%)

Chart 9: Awareness of rights in the event of a flight disruption



Q11a-d. In the event of a flight disruption, such as a delay, cancellation or denial of boarding, are you aware of your rights with respect to the following...?

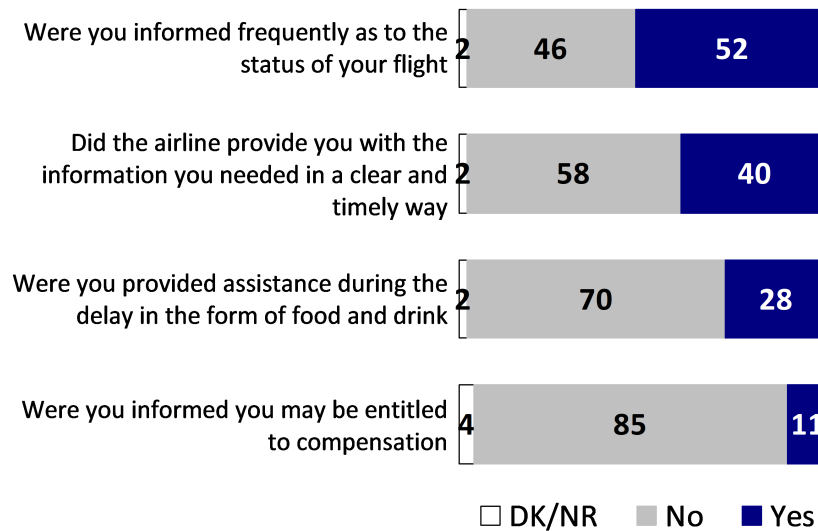
Base: n=2065

- Generally speaking, BC residents, those under 35 years of age, men, those earning \$150,000 or more in household income, those expressing confidence that they will have a positive travel experience the next time they fly, those satisfied with the resolution of a complaint to an airline, those who indicate they are aware that Canada has consumer protections for air passengers, and those who say they know the Canadian Transportation Agency can resolve air travel complaints are particularly likely to indicate awareness of these rights.

Assistance provided during flight disruption

Those who indicated they had experienced a flight disruption of more than two hours were asked if the airline provided them with needed information and assistance during the disruption. Just over half of these respondents (52%) indicated they were informed frequently as to the status of their flight, and only four in ten (40%) felt the airline provided needed information in a clear and timely manner. Very few indicated that the airline provided them with assistance during the delay in the form of food or drink (28%) or information about compensation for the delay (11%).

Chart 10: Assistance provided during flight disruption



Q12a-d. During the flight disruption...?

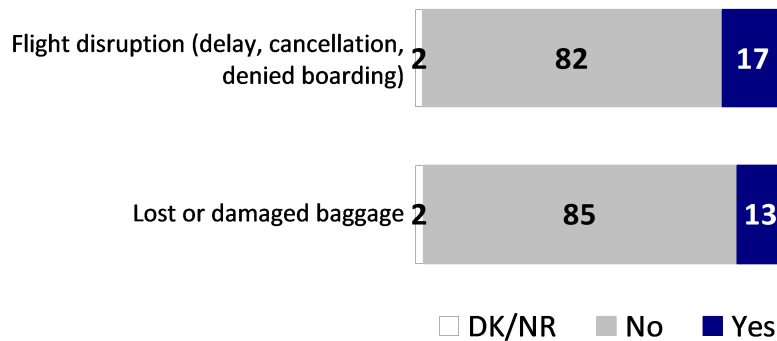
Base: n=1129

- Those indicating satisfaction with their most recent air travel experience, those expressing confidence that they will have a positive travel experience the next time they fly, those satisfied with the resolution of a complaint to an airline, those who indicated they were aware that Canada has consumer protections for air passengers, and those who say they know the Canadian Transportation Agency can resolve air travel complaints are most likely to indicate they received information/assistance during the flight disruption.

Submission of claim/complaint with an airline

Results suggest that few Canadian air travellers have submitted a claim or complaint with an airline in the past five years about a flight disruption (17%) or lost or damaged baggage (13%).

Chart 11: Submission of claim/complaint with an airline



Q13a-c. Did you submit a claim or complaint with an airline in the past five years about...?

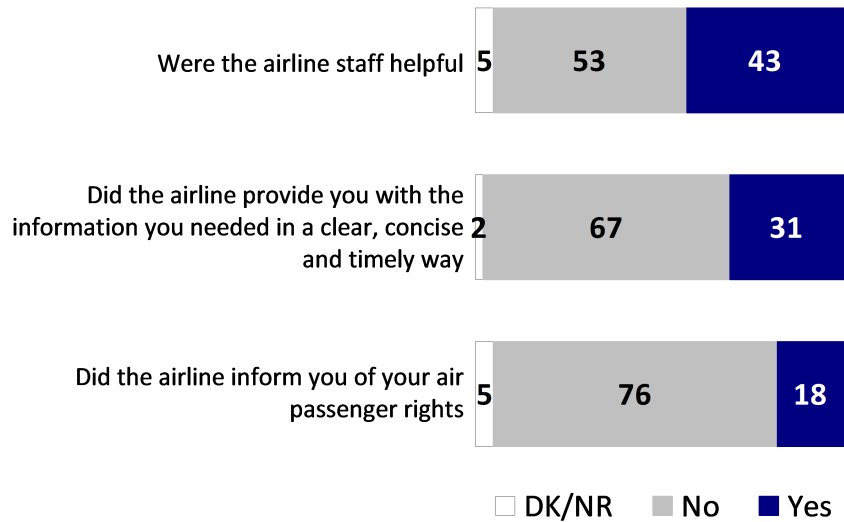
Base: n=2065

- Atlantic Province residents (22%), those under 35 years of age (21%), men (19%), those with university education (19%), and those earning \$150,000 or more in household income (21%) are particularly likely to say they submitted a complaint about an air travel disruption in the last five years.
- Those 55-64 years of age (17%) and those earning \$150,000 or more in household income (19%) are particularly likely to say they submitted a complaint about lost or damaged baggage in the last five years.
- Those not satisfied with their most recent air travel experience, those not confident that they will have a positive travel experience the next time they fly, and those not satisfied with the resolution of a complaint to an airline are more likely to say they submitted a complaint in the last five years.

Assistance with resolving a complaint

Those who indicated they had submitted a claim or complaint with an airline were asked whether the airline provided needed information or assistance when trying to resolve the problem. Only four in ten of these respondents felt the airline staff were helpful in resolving the complaint (43%), and even fewer felt the airline provided them with the information they needed in a clear, concise and timely way (31%) or informed them of their air passenger rights (18%).

Chart 12: Assistance with resolving a complaint



Q14a-c. When you tried to resolve the complaint with the airline...?

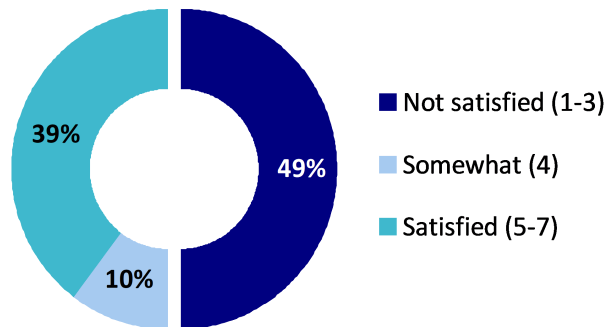
Base: n=575

- Saskatchewan/Manitoba residents (64%) and those earning \$40,000 - \$80,000 in household income (51%) are particularly likely to indicate the airline staff were helpful.
- Those with a high school education (39%) and those earning \$40,000 - \$80,000 in household income (42%) are most likely to indicate the airline provided them with needed information.
- Those indicating satisfaction with their most recent air travel experience, those expressing confidence that they will have a positive travel experience the next time they fly, and those satisfied with the resolution of a complaint to an airline are more likely to feel the airline provided the needed information and assistance across all these issues.

Satisfaction with the resolution of a complaint

Those who submitted a claim or complaint with an airline expressed low levels of satisfaction with the resolution of their complaint. Fewer than four in ten (39%) express satisfaction with the resolution of the issue, and almost half (49%) indicate dissatisfaction with the resolution of their complaint.

Chart 13: Satisfaction with resolution of complaint



Q15. How satisfied are you with the resolution of your complaint with the airline?

Base: n=575

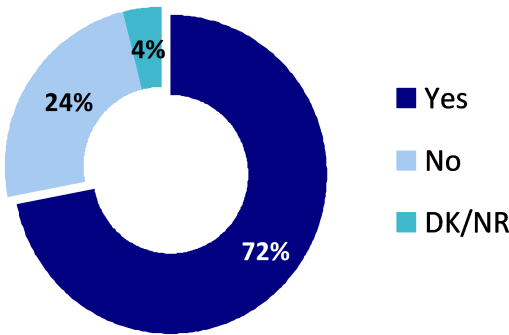
- Quebec residents (46%), those with high school education (47%), and those earning \$40,000 - \$80,000 in household income (51%) are most likely to express satisfaction with the resolution of their complaint.
- Those indicating satisfaction with their most recent air travel experience (50%) and those expressing confidence that they will have a positive travel experience the next time they fly (54%) are also more likely to express satisfaction with the resolution of their complaint.

D. PASSENGER EXPERIENCE WITH THE CTA

Awareness of consumer protections for air passengers

All respondents were asked if they were aware that Canada has consumer protections for air passengers. Three in four (72%) say they are aware of these protections, and only one in four (24%) say they are unaware.

Chart 14: Awareness of consumer protections for air passengers



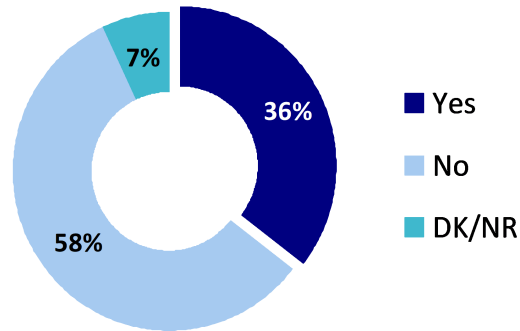
Q16. Are you aware that Canada has consumer protections for air passengers?
Base: n=2065

- Claimed awareness of consumer protections for air passengers was higher among BC residents (77%), those 55 years of age and older (77%), men (78%), those with university education (75%), those earning \$150,000 or more in household income (81%), those satisfied with the resolution of a complaint to an airline (79%), and those who say they know the Canadian Transportation Agency can resolve air travel complaints (96%).

Awareness of the Canadian Transportation Agency

Respondents were also asked if they were aware that the Canadian Transportation Agency can resolve air travel complaints. Only about one in three Canadian air travellers (36%) say they know the CTA can resolve air travel complaints, while 58% say they are not aware of this.

Chart 15: Awareness of the Canadian Transportation Agency



Q17. Do you know the Canadian Transportation Agency can resolve air travel complaints?

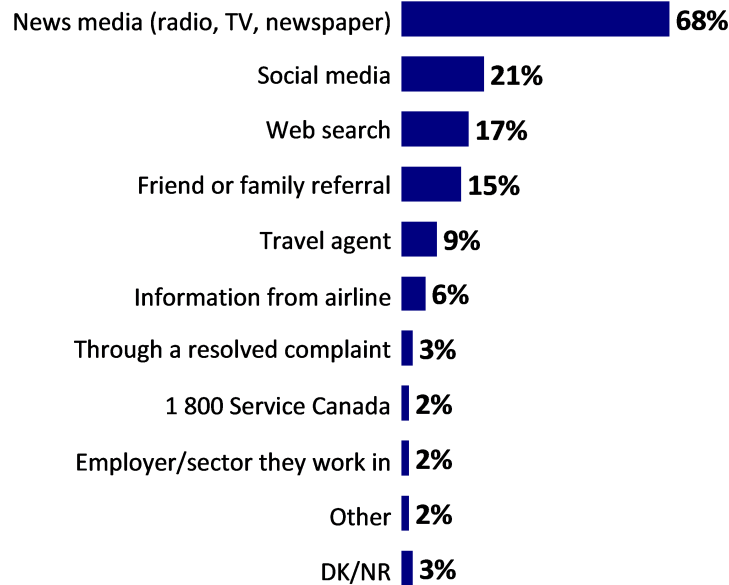
Base: n=2065

- Claimed awareness that the Canadian Transportation Agency can resolve air travel complaints is higher among those 65 years of age and older (43%), men (38%), those earning \$150,000 or more in household income (42%), those satisfied with the resolution of a complaint (42%), and those indicating awareness of consumer protections for air passengers (47%).

Source of awareness of the Canadian Transportation Agency

Those who indicated they were aware that the CTA could resolve air travel complaints were asked how they became aware of the Agency. News media was mentioned most often (68%), followed by social media (21%) and a web search (17%).

Chart 16: Source of awareness of the Canadian Transportation Agency



Q18. [IF YES] How did you become aware of the Canadian Transportation Agency? [Choose all that apply]

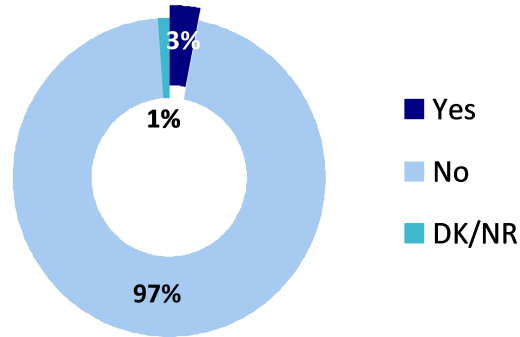
Base: n=774

- BC residents (77%), men (72%), those 65 years of age and older (81%), those with high school education (76%), those indicating satisfaction with their most recent air travel experience (70%), and those expressing confidence that they will have a positive travel experience the next time they fly (71%) are particularly likely to mention news media as the source of their awareness of the Agency.

Experience with the Canadian Transportation Agency

All respondents were asked if they had filed a complaint with the Canadian Transportation Agency. Only three percent of the air travelers surveyed indicated they had filed a complaint with the CTA; the vast majority (97%) had not.

Chart 17: Experience with the Canadian Transportation Agency



Q19. Have you filed a complaint with the Canadian Transportation Agency?

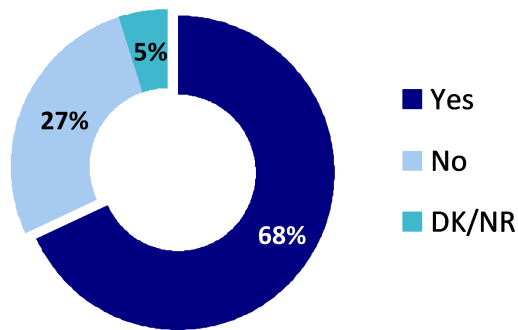
Base: n=2065

- Atlantic Province residents (6%), those with university education (4%), and those earning \$150,000 or more in household income (4%) are more likely to say they filed a complaint with the Canadian Transportation Agency.
- Those not satisfied with their most recent air travel experience (5%), those not confident that they will have a positive travel experience the next time they fly (5%), and those not satisfied with the resolution of a complaint to an airline (12%) are also more likely to say they filed a complaint with the Canadian Transportation Agency.

Clarity of information provided by the Canadian Transportation Agency

Those who indicated they had filed a complaint with the CTA were asked if the instructions to complete the Agency complaint form were clear and easy to follow. Most of these respondents (68%) indicated the form was easy to complete. However, 27% did not feel the form was easy to complete.

Chart 18: Clarity of information provided by the Canadian Transportation Agency



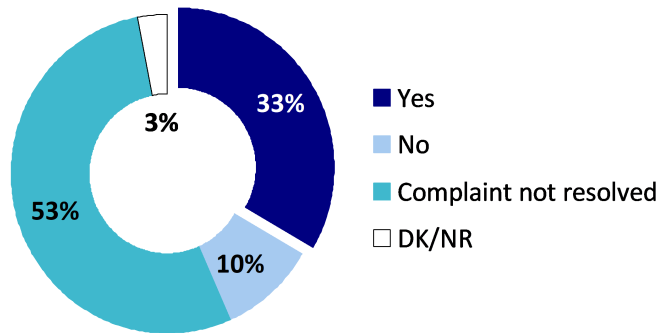
Q20. [IF YES] Were the instructions to complete the Canadian Transportation Agency complaint form clear and easy to follow?

Base: n=59

Clarity of decision from the Canadian Transportation Agency

Those who indicated they had filed a complaint with the CTA were also asked if the decision and reasoning provided by the CTA in the resolution of the complaint was easy to understand, irrespective of the outcome. Results are mixed: 33% of these respondents indicated yes, 10% indicated no, and the majority (53%) indicated the complaint was not resolved.

Chart 19: Clarity of decision from the Canadian Transportation Agency



Q21. If the Canadian Transportation Agency resolved your complaint, were the decision and the reasoning provided easy to understand, irrespective of the outcome?

Base: n=59

APPENDICES

A. METHODOLOGICAL DETAILS

The research involved an online survey of 2,065 Canadians 18 years of age and older who have travelled by air since 2019. The survey was conducted across Canada in both official languages. The field dates for the survey were January 25-February 6, 2024.

We used our probability-based online panel, *Probit*, to undertake this survey. *Probit* is an online research panel that has been designed by EKOS to provide statistically representative data. Our panel offers complete coverage of the Canadian population (Internet, phone, cell phone), random recruitment (participants are recruited randomly; they do not opt themselves into our panel), and equal probability sampling. All respondents to our panel are recruited by telephone using random digit dialling, and their demographic information is confirmed by live interviewers.

The distribution of the recruitment process for our panel mirrors the actual population in Canada (as defined by Statistics Canada). As such, our panel can be considered representative of the general public (survey results from our online panel support confidence intervals and margin of error estimates). The overall panel size is roughly 100,000 Canadian households. Random stratified samples are drawn from the panel database for individual research assignments.

All survey results were weighted by region, age, and gender according to Statistics Canada data to ensure that the results were representative of the Canadian public. The margin of error for a survey of $n=2,065$ is ± 2.2 percentage points 19 times out of 20.

Questionnaire design

The CTA provided EKOS with a draft questionnaire for review and comment. In consultation with the CTA, EKOS revised and finalized the questionnaire.

EKOS data analysts programmed the final questionnaire and performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the survey's basic logic. The data collection system handles sampling invitations, quotas and questionnaire completion (skip patterns, branching, and valid ranges). The client was also given the opportunity to test the survey links.

Prior to finalizing the survey for the field, a pre-test (soft launch) was conducted in English and French. The pre-test assessed the questionnaire in terms of question wording and sequencing, respondent sensitivity to specific questions and to the survey overall, and to determine the survey length; standard Government of Canada pre-testing questions were also asked. The final survey questionnaire is included in Appendix B.

Fieldwork

The survey was conducted by EKOS using a secure, fully-featured web-based survey environment. The average interview length was 11.9 minutes.

All respondents were offered the opportunity to complete the survey in their official language of choice. All research work was conducted in accordance with the Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys and recognized industry standards, as well as applicable federal legislation (*The Privacy Act, Personal Information Protection and Electronic Documents Act, and Access to Information Act*).

Completion results

The completion results are presented in the table below.

| Contact disposition | |
|--------------------------------|----------|
| Disposition | N |
| Total invitations (c) | 32,064 |
| Total completes (d) | 2,065 |
| Qualified break-offs (e) | 176 |
| Disqualified (f) | 958 |
| Not responded (g) | 28,865 |
| Quota filled (h) | 0 |
| Contact rate = (d+e+f+h)/c | 10.0% |
| Participation rate = (d+f+h)/c | 9.4% |

Non-response bias analysis

The table below presents a profile of the final sample, compared to the actual population of Canada (2021 Census information). As is the case with most surveys, the final sample under-

represents younger Canadians, and those with high school or less education, which is a typical pattern for public opinion surveys in Canada (i.e., older Canadians, and those with more education are more likely to respond to surveys).

Non-response bias analysis

| Sample type | Sample* | Canada (2021 Census) |
|-----------------------------------|----------------|---------------------------------|
| Gender (18+) | | |
| Male | 53% | 49% |
| Female | 46% | 51% |
| Age | | |
| 18-34 | 16% | 27% |
| 35-54 | 38% | 32% |
| 55+ | 45% | 41% |
| Education level | | |
| High school diploma or less | 17% | 39% |
| Trades/college/post sec no degree | 38% | 32% |
| University degree | 45% | 29% |

* Data are unweighted and percentaged on those giving a response to each demographic question

B. SURVEY QUESTIONNAIRE

[Note: Right column provides numeric coding used for the machine collation of statistics and is not displayed to users.]

INTRO

Thank you for participating in this survey. EKOS Research Associates is conducting a survey on air travel experiences on behalf of the Government of Canada.

Si vous préférez répondre au sondage en français, veuillez cliquer sur français.

The survey takes about 12 minutes to complete and your participation is voluntary and confidential. Your answers will remain anonymous and the information you provide will be administered according to the requirements of the Privacy Act, the Access to Information Act, and any other pertinent legislation. To view our privacy policy click here.

Should you have any questions about the survey please contact the Government of Canada at info@otc-cta.gc.ca.

If you require any technical assistance, please contact online@ekos.com

Q1A

In the past five years, how often have you flown:

| | |
|-----------------|--------|
| Within Canada | [code] |
| 1-2 times | 1 |
| 3-5 times | 2 |
| 6 or more times | 3 |
| Have not flown | 4 |

Q1B

| | |
|-----------------|--------|
| Internationally | [code] |
| 1-2 times | 1 |
| 3-5 times | 2 |
| 6 or more times | 3 |
| Have not flown | 4 |

Q2

| When did you last travel by air? | [code] |
|----------------------------------|--------|
| Earlier this year (2024) | 1 |
| 2023 | 2 |
| 2022 | 3 |
| 2021 | 4 |
| 2020 | 5 |
| 2019 | 6 |
| 2018 or earlier | 7 |

PREQ3

Please read the statements below and tell us how each of them influences your decision when purchasing a ticket

Q3A

| Price of the ticket | [code] |
|--------------------------|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q3B

| Reputation of the airline | [code] |
|---------------------------|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q3C

| Previous experience with airline | [code] |
|----------------------------------|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q3D

| Quality of service | [code] |
|--------------------------|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q3E

| Loyalty programs | [code] |
|--------------------------|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q3F

| Environmental concerns | [code] |
|--------------------------|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q3G

| No other airline option available | [code] |
|-----------------------------------|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q3H

| Accessibility services | [code] |
|--------------------------|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q3I

| Usability of their website or mobile app | [code] |
|--|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q3J [0,1]

| Other (please specify) | [code] |
|--------------------------|--------|
| Not at all influential 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very influential 7 | 7 |
| 'Don't know/ No response | 99 |

Q4

| How did you book your most recent flight? Choose one. | [code] |
|--|--------|
| Directly with an airline via a website | 1 |
| Directly with an airline via a mobile app | 2 |
| Through third-party service (e.g. Expedia, FlightCentre, etc.) | 3 |
| Through travel agent | 4 |
| Other (please specify) | 77 |
| 'Don't know/No response | 99 |

Q5

Overall, how satisfied are you with your most recent air travel experience?

| | [code] |
|-------------------------|--------|
| 1 Not at all satisfied | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| 7 Very satisfied | 7 |
| 'Don't know/No response | 99 |

Q6 [1,3]

What improvements or changes would you suggest to airlines or airports to enhance passengers' air travel experience?

77 77

PREQ7

When booking your most recent flight, how clear was the information provided to you about the following:

Q7A

| Travel itinerary | [code] |
|--------------------------|--------|
| Not at all clear 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very clear 7 | 7 |
| 'Don't know/ No response | 99 |

Q7B

| Terms and conditions for the ticket | [code] |
|-------------------------------------|--------|
| Not at all clear 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very clear 7 | 7 |
| 'Don't know/ No response | 99 |

Q7C

| | |
|--------------------------|--------|
| Rules for refunds | [code] |
| Not at all clear 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very clear 7 | 7 |
| 'Don't know/ No response | 99 |

Q7D

| | |
|--------------------------------------|--------|
| Seating information and seating fees | [code] |
| Not at all clear 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very clear 7 | 7 |
| 'Don't know/ No response | 99 |

Q7E

| | |
|--------------------------|--------|
| Rebooking fees | [code] |
| Not at all clear 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very clear 7 | 7 |
| 'Don't know/ No response | 99 |

Q7F

| | |
|--------------------------|--------|
| Other fees or charges | [code] |
| Not at all clear 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| Very clear 7 | 7 |
| 'Don't know/ No response | 99 |

Q8

How confident are you that you will have a positive travel experience the next time you travel by air?

| | [code] |
|-------------------------|--------|
| 1 Not at all confident | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| 7 Very confident | 7 |
| 'Don't know/No response | 99 |

Q9

How confident are you that the airline will provide you with a satisfactory solution if there is a problem with your flight?

| | [code] |
|-------------------------|--------|
| 1 Not at all confident | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| 7 Very confident | 7 |
| 'Don't know/No response | 99 |

Q10

Have you experienced an air travel disruption that resulted in a delay of more than two hours in the last five years?

| | [code] |
|-------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/No response | 99 |

PQ11

In the event of a flight disruption, such as a delay, cancellation or denial of boarding, are you aware of your rights with respect to the following:

Q11A

| Compensation for inconvenience due to the disruption | [code] |
|--|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 9 |

Q11B

Assistance in the form of food and drink, and where required accommodation

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 9 |

Q11C

Rebooking

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 9 |

Q11D

Refund

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 9 |

PQ12

During the flight disruption:

Q12A

Did the airline provide you with the information you needed in a clear and timely way?

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

Q12B

Were you informed frequently as to the status of your flight?

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

Q12C

Were you provided assistance during the delay in the form of food and drink?

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

Q12D

Were you informed you may be entitled to compensation?

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

PREQ13

Did you submit a claim or complaint with an airline in the past five years about:

Q13A

Flight disruption (delay, cancellation, denied boarding)

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

Q13B

Lost or damaged baggage

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

Q13C [0,1]

Other issue (please specify)

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

PREQ14

When you tried to resolve the complaint with the airline:

Q14A

Did the airline inform you of your air passenger rights?

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

Q14B

Did the airline provide you with the information you needed in a clear, concise and timely way?⁴

| | [code] |
|--------------------------|--------|
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

Q14C

| | |
|---------------------------------|--------|
| Were the airline staff helpful? | [code] |
| Yes | 1 |
| No | 2 |
| 'Don't know/ No response | 99 |

Q15

How satisfied are you with the resolution of your complaint with the airline?

| | |
|-------------------------|--------|
| | [code] |
| 1 Not at all satisfied | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| 7 Very satisfied | 7 |
| 'Don't know/No response | 99 |

Q16

Are you aware that Canada has consumer protections for air passengers?

| | |
|-------------------------|--------|
| | [code] |
| Yes | 1 |
| No | 2 |
| 'Don't know/No response | 99 |

Q17

Do you know the Canadian Transportation Agency can resolve air travel complaints?

| | |
|-------------------------|--------|
| | [code] |
| Yes | 1 |
| No | 2 |
| 'Don't know/No response | 99 |

Q18 [1,9]

How did you become aware of the Canadian Transportation Agency?

| | |
|-----------------------------------|--------|
| Please choose all that apply. | [code] |
| Through a resolved complaint | 1 |
| Web search | 2 |
| Information from airline | 3 |
| 1 800 Service Canada | 4 |
| Social media | 5 |
| Travel agent | 6 |
| News media (radio, TV, newspaper) | 7 |
| Friend or family referral | 8 |
| Other (please specify) | 77 |
| 'Don't know/No response | 99 |

Q19

Have you filed a complaint with the Canadian Transportation Agency?

[code]

| | |
|-------------------------|----|
| Yes | 1 |
| No | 2 |
| 'Don't know/No response | 99 |

Q20

Were the instructions to complete the Canadian Transportation Agency complaint form clear and easy to follow?

[code]

| | |
|-------------------------|----|
| Yes | 1 |
| No | 2 |
| 'Don't know/No response | 99 |

Q21

If the Canadian Transportation Agency resolved your complaint, was the decision and the reasoning provided easy to understand, irrespective of the outcome?

[code]

| | |
|-------------------------|----|
| Yes | 1 |
| No | 2 |
| Complaint not resolved | 9 |
| 'Don't know/No response | 99 |

QAGE

The following questions will be used for statistical purposes only.

What is your age? [code]

| | |
|----------------------|----|
| Please specify: | 77 |
| Prefer not to answer | 99 |

QAGEY***Hesitant, QAGE***

May we place your age into one of the following general age categories?

| | [code] |
|----------------------|--------|
| 18-24 years | 1 |
| 25-34 years | 2 |
| 35-44 years | 3 |
| 45-54 years | 4 |
| 55-64 years | 5 |
| 65 years or older | 6 |
| Prefer not to answer | 99 |

QGENDR

Are you...?

| | [code] |
|-------------------------|--------|
| Male | 1 |
| Female | 2 |
| Prefer to self-identify | 77 |
| Prefer not to answer | 99 |

QPROV

In which province or territory do you live?

| | [code] |
|---------------------------|--------|
| British Columbia | 1 |
| Alberta | 2 |
| Saskatchewan | 3 |
| Manitoba | 4 |
| Ontario | 5 |
| Quebec | 6 |
| New Brunswick | 7 |
| Nova Scotia | 8 |
| Prince Edward Island | 9 |
| Newfoundland and Labrador | 10 |
| Yukon | 11 |
| Northwest Territories | 12 |
| Nunavut | 13 |
| Prefer not to answer | 99 |

QEDUC

What is the highest level of schooling that you have completed?

| | [code] |
|--|--------|
| Less than High School diploma or equivalent | 1 |
| High School diploma or equivalent | 2 |
| Registered Apprenticeship or other trades certificate or diploma | 3 |
| College, CEGEP or other non-university certificate or diploma | 4 |
| University certificate or diploma below bachelor's level | 5 |
| Bachelor's degree | 6 |
| Post graduate degree above bachelor's level | 7 |
| Prefer not to answer | 99 |

QINC

What is your gross household income (the combined income of all those earners in a household from all sources, including wages, salaries, or rents and before tax deductions)

| | [code] |
|-----------------------------------|--------|
| Under \$20,000 | 1 |
| \$20,000 to just under \$40,000 | 2 |
| \$40,000 to just under \$60,000 | 3 |
| \$60,000 to just under \$80,000 | 4 |
| \$80,000 to just under \$100,000 | 5 |
| \$100,000 to just under \$150,000 | 6 |
| \$150,000 and above | 7 |
| Prefer not to answer | 99 |

THNK

Those are all the questions we have for you. Thank you very much for taking the time to complete this survey, it is greatly appreciated. Your answers have been saved and you may now close your browser window.

THNK2

Screened-out

Unfortunately, based on your responses you are ineligible to participate in this survey. Thank you for your time!