Savanta:

Cleared for takeoff

Research for the aviation sector

savanta.com

Make better decisions

Why Savanta

We understand the challenges that the aviation sector is facing.

We have extensive experience with the industry.

We have the tools and methods to address your research and insight needs.

Understanding current issues in the aviation sector

The environment in which airports operate has changed markedly in recent years, with COVID-19 presenting an enormous crisis for the aviation industry. As recovery continues, aviation organisations are looking ahead to their long-term strategy, and airports in particular face a diverse and challenging range of issues.

- How can airports continue to serve customers while remaining compatible with ambitions to achieve Net Zero?
- With passenger behaviours and the composition of travellers markedly different to before the pandemic, how can airports best tailor their services?
- What is driving the rapid increase in the number of passengers requiring assistance, and how can services be adapted accordingly?
- How can airports ensure they are a positive influence on local communities?
- What benefits do employees want in an increasingly competitive environment?
- How to best progress infrastructure projects in a way that satisfies public and stakeholder concerns?
- How can you encourage passenger numbers and repeat business?
- How can the retail experience be optimised to meet what today's airport customer wants?
- How are you perceived by stakeholders – MPs, councillors, business leaders, suppliers and others?

Experience

Savanta supports clients across the aviation industry to achieve their goals, and meet the changing demands of their customers, stakeholders and regulators.

We have extensive experience working with airports across the UK to address their challenges, ranging from meeting regulatory requirements on airspace modernisation consultation, to developing local engagement strategies, to meeting sustainability obligations and improving staff satisfaction.

We also bring in-depth expertise from across the wider sector, working with the CAA, aviation organisations and trade bodies. In addition, we can draw on a wide range of cross-sector experience in other regulated sectors, including rail, energy and water.

We use this expertise to deliver insightful research focused on driving meaningful improvements for our clients.

Approaches

We are methodology-agnostic, deploying an extensive range of quantitative and qualitative research tools across all methodologies, selecting the most appropriate approach to meet our clients' objectives.

We can access all audiences of interest to airports, including customers, vulnerable audiences, local residents, business leaders, senior stakeholders, employees and suppliers.

This document provides an overview of how we can act as strategic research partners to airports.

Savanta have been a valued research partner to Heathrow since 2015, delivering research among a wide range of public and stakeholder audiences. We greatly value the flexibility and agility they bring, which allows us to respond to fast-changing organisational requirements.

Savanta's insights inform our organisational strategy and help us to plan for the future with confidence."
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Research and Insights Team, Heathrow

How Savanta can support you

We support airports across a diverse range of research areas and objectives. Our extensive toolkit includes cutting-edge techniques to deliver insightful and comprehensive research outcomes.

Airspace modernisation

Localised research

Understanding the public

Brand tracking

Comms testing and evaluation

Customer behaviour and retail

Employee and staff research

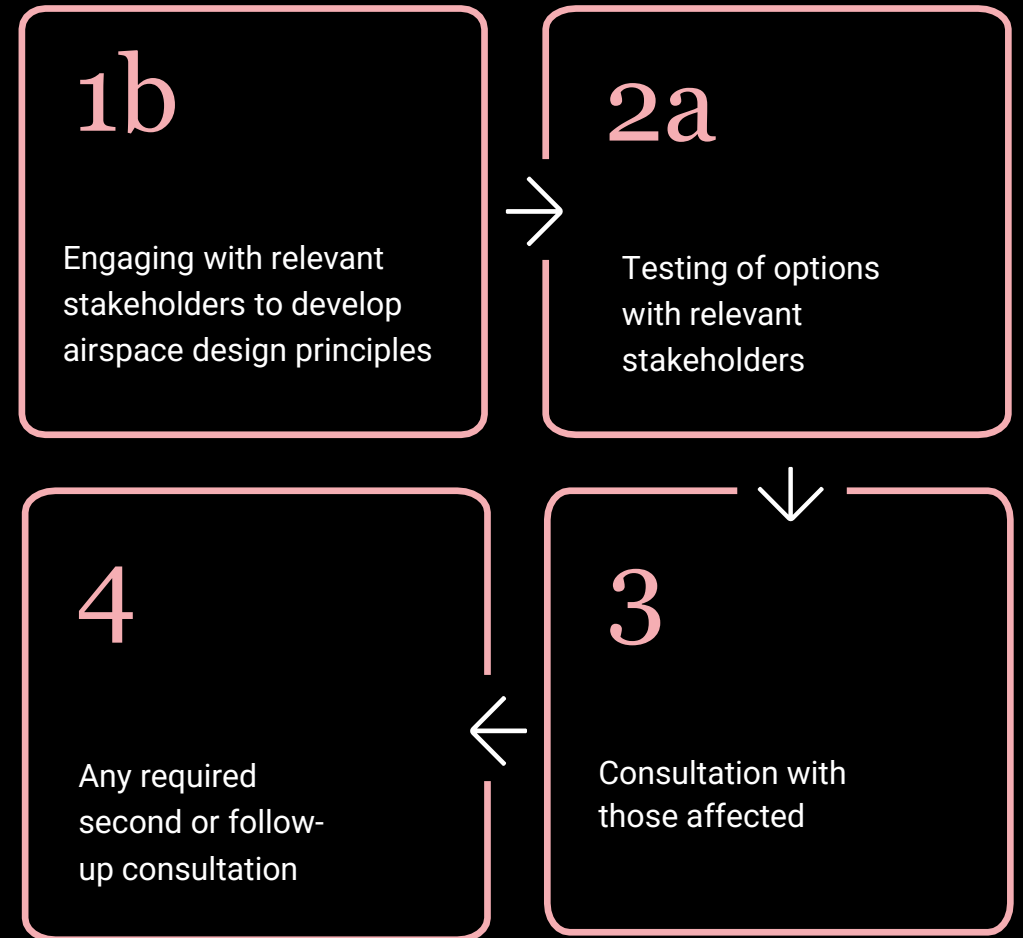Stakeholder engagement and understanding

Airspace modernisation

The Airspace Modernisation Strategy, updated in 2023, requires airports, as airspace change sponsors, to undergo a stringent regulatory process (CAP1616) in order to update their airspace.

Passing CAA scrutiny and validation is a core requirement of the airspace change process, and airports must demonstrate transparency, engagement with those affected, and that they have provided opportunities for those impacted by proposals to have their voices heard.

Savanta has a track record of supporting airports navigate this process. We can provide advisory, analytical and / or practical support.

We deploy a range of techniques to support your consultation process, including stakeholder workshops and interviews, focus groups, surveys and consultations.

Supporting you at multiple key stages throughout the process

1b
Engaging with relevant stakeholders to develop airspace design principles

2a
Testing of options with relevant stakeholders

4
Any required second or follow-up consultation

3
Consultation with those affected

Localised research

Local residents are a crucial audience for any airport, and there is increasing scrutiny nationally on the impact airports have on those who live nearest to them. Ultimately, airports should improve, not harm, local quality of life.

It is important for an airport not just to provide flights, but to be an engine for growth, to invest in local communities, to demonstrate community engagement and collaboration, to plan infrastructure and land use, and to take steps to mitigate noise and environmental impacts on the local community.

Research to understand the attitudes and needs of the local community is crucial to achieving these goals.

" *Ultimately, airports should improve, not harm, local quality of life.*

Understanding the public

Covid-19 saw the aviation industry face unprecedented change. While recovery has been strong, numbers have still not returned to pre-pandemic levels, and all airports will be looking to do more to continue this upward trend.

Understanding the public is essential to enabling you to tailor your services and offering to your current and potential travellers.

01 Understanding current travel behaviours

This allows you to predict demand, identify potential new destinations and tailor the airport offering to your passenger base.

02 Forecasting future travel patterns

Equally important to an airport's success, future trends could be driven by changes in travel behaviour, such as a destination changing in popularity, or in wider passenger attitudes, such as levels of environmental concern.

03 Passengers with Reduced Mobility

PRMs are one of the fastest-growing passenger groups in aviation. Research can help you understand the drivers of this change, the impact it is likely to have on your airport, and how this can be addressed.

Brand tracking

Understanding your brand is essential to maintaining passenger numbers, ensuring growth and developing a long-term strategy.

Crucial for any airport is how it performs on key metrics such as quality of service, ease of getting to, value for money, range of destinations and airlines served.

Equally important is understanding how significant these metrics are to driving airport choice, and how you are perceived in relation to competitors.

A strong brand is an attractor and a trigger to get people to choose you, serves as a tie-breaker with the competition, and allows your brand to command desired or premium pricing.

Savanta works with clients to build brands, not just track them, and we ensure what we do has tangible business impact.

" *Savanta works with clients to build brands, not just track them, and we ensure what we do has tangible business impact"*

Comms testing and evaluation

Testing and evaluating communications campaigns is essential to ensure they are effectively delivering on objectives and return on investment. Savanta can support you with this in two key ways:

01   Optimising design

No campaign should be launched without testing it to see if it will resonate with your audience. Our Campaign Optimiser is a suite of tools to allow you to design the best campaign possible:

- Understand the cut-through and impact of your creative campaign
- Identify the best-performing options to deploy live
- Amend and hone creative design for maximum impact

02   Evaluating impact

It is essential to evaluate the impact of marketing campaigns to understand if they are delivering ROI. Savanta's marketing campaign evaluation allows you to:

- Understand which elements of the campaign worked well and which did not
- Learn how the audience responded to the campaign
- Review the effectiveness of the campaign versus objectives
- Provide learnings for future campaigns

Customer behaviour and retail

Understanding customer behaviour is vital for any airport's success, essential to:

- Delivering a positive airport experience; providing what customers want, maximising ease of use and improving wayfinding.
- Optimising retail provision and the retail experience in order to enhance customer spend.
- Future-proofing the above by forecasting future trends (anything from charging point demand to food options).

By observing and recording behaviors ethnographically in a particular setting at a particular time, Savanta uncover the appropriate interventions for you to effect positive change.

Savanta's behavioural change frameworks will help you make sense of the context in which customers are operating, the norms they follow, the barriers to adoption and the levers that are available to influence them.

Employee and staff research

Employee research can serve many purposes – nurturing an engaged workforce, improving operational effectiveness, enhancing customer service, and creating a positive work environment. Employee engagement is especially important for airports, who frequently have a diverse range of staff types, and are prone to industrial action.

Employee research will help you gather feedback on the drivers of and barriers to retention and talent management, identify training and development needs, and assess organisational climate and culture.

We can deploy a range of solutions to meet your requirements, including surveys, focus groups and interviews, all of which can be tailored to reach all your staff, including those who are not office-based. Our analytical approach will enable you to prioritise action plans and inform your wider strategy.

"Savanta have helped FTSE 100 companies develop their employee engagement strategy using a consultative approach that delivers clear insights and a roadmap of actions."

Stakeholder engagement and understanding

All airports have a diverse range of stakeholders, the support of whom is essential for continued success. From MPs to Councillors, local government officers, business groups, government agencies, passenger groups, investors, suppliers and partners, maintaining positive relationships with stakeholders is crucial.

Savanta's industry-leading approach to stakeholder research combines quantitative and qualitative methods to provide rich data for your organisation. Our bespoke projects are closely aligned to your objectives, and focused on delivering insights that enable you to drive continuous improvement, as well as maintaining and enhancing these crucial relationships.

Stakeholder research provides tangible benefits, including:

Generating stakeholder buy-in

Understanding stakeholders

Informing decision-making

Identifying issues

Southampton Airport

Shaping design principles

The challenge:

In 2019, Southampton Airport needed robust and independent insight to help shape its design principles, as part of its requirements to pass Stage 1b of the CAP1616 airspace modernisation process.

Our approach:

We conducted a series of focus groups with local residents, using flight path data to segment the groups according to whether participants currently lived under a flight path, or did not but were still within the CAA's potentially affected area radius. The groups explored the need for airspace change and the process for it, and attitudes towards different design principle themes including the environment, safety, infrastructure and the economy.

The outcome:

Savanta produced a full analytical report on the findings, including clear conclusions for the airport on the priorities for local residents when it came to airspace modernisation. Southampton Airport successfully passed Stage 1b and our report can be found as part of its submission to the CAA.

The Civil Aviation Authority

Understanding the public

The challenge:

The Civil Aviation Authority (CAA), the UK's aviation regulator, requires robust and independent data to understand the performance of the aviation sector.

The UK Aviation Consumer Survey is the regulator's annual investigation into UK consumer behaviour and attitudes regarding flying. Insight from the survey enables the CAA to understand how the sector is serving passengers, and where action is required.

Our approach:

Every wave, Savanta surveys a representative sample of 3,500 UK adults. We use a mixed-methods approach conducting interviews both online and by telephone, to make sure that participants are not excluded due to the survey methodology.

The survey covers a wide range of topics, including airline pricing, safety, punctuality and the environment. Each wave, Savanta design the topical questions for the survey, in close partnership with the CAA and the CAA's Consumer Panel.

The outcome:

We provide both a dashboard summary of results, and a full report on the survey, providing the CAA with detailed insight into the performance of the UK aviation sector, and how the passenger experience can be improved. The results are used to inform regulatory decisions and interventions across the CAA.

The latest results can be seen here.

Meet our transportation practice experts

James Rentoul
Senior Director –
Transport

James oversees much of Savanta's work in the aviation sector, including research among passengers, business leaders and senior stakeholders. He has a particular focus on policy, strategy and stakeholder research. His clients include Heathrow Airport, NATS, the Civil Aviation Authority (CAA) and the DfT. He understands the wider picture of the sector, and the issues and challenges aviation organisations face.

Steven King
SVP – Transport

Steve is one of the most experienced transport researchers within the UK, having specialised in this area for nearly 30 years. He currently works on research for Gatwick Airport, Transport Focus and the DfT. His experience covers the full range of qualitative and quantitative approaches, with a particular focus on the customer experience and retail provision.

Mark Pingol
SVP – Behavioural

Mark has over 20 years' experience leading projects for a wide variety of clients, including airports and retail brands, to help them shape and influence behavior through understanding what people think and the context in which decisions are made. He has extensive experience conducting large, global mixed methods projects that include ethnographic and implicit approaches.

Savanta:

Savanta is the full-service global market research and data insight company that helps businesses make better decisions.

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