

# **2131 Consumer Research**

**Final Report**

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# **1 INTRODUCTION**

## **1.1 Background**

The research was commissioned by the CAA in order to provide evidence and inform a number of workstreams surrounding passenger choice and information use. Whilst a holistic approach was taken to the quantitative data collection, broadly these workstreams can be divided across the following areas:

### **Consumer Policy – Service Quality and Passenger Rights**

The research findings reported in this document will help inform the CAA's developing consumer policy and have built on previous CAA passenger surveys, in particular their dissatisfaction with their ability to compare service quality across airlines as well as a poor understanding of their rights when travelling by air.

The research will also assist in determining the issues consumers consider to be important when booking an air ticket and the information they would like to enable them to choose the best product for them.

### **Airport Competition**

The CAA regulatory team is working to develop guidelines for assessing the level of competition faced by an airport. In order to define the market and assess the possibility of passengers switching between airports the CAA wished to gain an understanding of:

- what is important to customers in deciding on their travel arrangements
- other options that they would consider as substitutes (eg in terms of destination or airport)
- how easily they would be able to switch between those substitutes.

### **Environment**

The Department for Transport (DfT) is currently consulting on amending the CAA's statutory framework. The consultation is looking at a wide range of issues including giving the CAA primary objectives to consider the interaction of consumers with the environment. It is also looking at a context for providing powers for the CAA to collect and publish information.

The research findings are also expected to inform the CAA's developing environmental policy.

## 1.2 Objectives

The main objectives of the study were to explore two related questions:

- the information that consumers **currently** use when making a purchasing decision, and the relative weight placed on different types of information
- the information that, if it **were made available**, consumers would place weight upon when making a purchasing decision.

Within this context, the CAA wished to consider the following aspects of the consumer decision-making process:

- airline service quality
- airport choice
- environment
- passenger rights.

## 2 METHODOLOGY

### 2.1 Target Audience

The research focussed on those consumers who had booked a flight no more than three months from the interview date as it was important that respondents were able to recall certain details of their booking behaviour and choices made. The CAA wished to be able to robustly review the data by a number of segments – the key segments being:

- Booking channel:
  - On-line
  - Telephone/other
  - Travel agent
- Journey purpose:
  - Business
  - Leisure/visiting friends/relatives (VFR)
- Length of flight:
  - Domestic
  - Short haul (up to 3 hrs) and mid haul (4 to 6 hrs)
  - Long haul (7 hrs or longer).

For stated preference analysis the minimum number of interviews advisable on which to conduct meaningful analysis is 75 per cell of interest. Accent therefore recommended that this minimum number be applied to each of the above segments of interest whilst also understanding that there would be a degree of overlap between the segments (for example a respondent would fall into each of the three key segments of interest – ie: journey purpose, booking channel and flight duration).

However, the non stated preference elements were also key in providing data to answer the project objectives and the analysis of this type of data is subject to the standard error margins associated with sampling. As such the minimum number of interviews per cell of interest was increased to reflect the following quota targets:

**Table 1: Fieldwork Targets**

Target interviews per flight length	Number
Domestic	400
Short haul and mid haul	1,050
Long haul	550
<b>Total</b>	<b>2,000</b>

Target interviews by cabin	Number
Business/premium economy	400
Full service economy	1,025
NFC/charter	575
<b>Total</b>	<b>2,000</b>

Target interviews by journey purpose	Number
Business	600
Leisure/vfr	1,400
<b>Total</b>	<b>2,000</b>

Target interviews by booking channel	Number
Online	1,200
Travel agent	400
Telephone/other	400
<b>Total</b>	<b>2,000</b>

## 2.2 Survey Method

To ensure the survey captured the views of a range of consumers a mixed methodology approach was utilised for the data collection. The majority (1,826) of the interviews were conducted online via panels provided by ToLuna and Research Now!. To supplement this data and to ensure the views were collected of those who are not typically well represented on panels (for example those in the older age categories or those with limited or no access to the Internet) a CATI (computer assisted telephone interviewing) approach was used to collect the remaining 400 interviews.

Fieldwork was undertaken from last January 2011 thru early March 2011. The fieldwork was undertaken against the relatively recent backdrop of the Credit Crunch (resulting in a number of travel companies filing for bankruptcy) and Volcanic Ash disruption which led to widespread travel uncertainty.

A pilot of 200 interviews was conducted in late December 2010 and January 2011 to test the questionnaire in terms of length and respondent understanding. One hundred interviews were conducted online and 100 were conducted using CATI.

The pilots were conducted in order to test:

- the recruitment process
- the clarity and flow of the questionnaire
- the appropriateness of the language used
- the accuracy of all routings
- ease of use of the show material
- the stated preference design and understanding of the stated preference exercises
- the interview duration
- the survey hit rate.

The results of the pilot were reported separately and reviewed with the CAA team. No substantial changes were made to the questionnaire or stated preference exercises following the pilot.

## 2.3 Quotas

A total of 2,226 interviews were achieved. The overrun related to the difficulty of closing certain quotas whilst trying to fulfil others. Table 2 shows the breakdown of interviews achieved by the different quota groups:

**Table 2: Interviews Achieved by Quota Groups**

Interviews by flight length & cabin	TU	Online	Total	Target Quotas
Domestic - business class	1	68	69	100
Domestic - full service economy	13	121	134	150
Domestic - NFC/charter	65	221	286	150
Short & mid haul - business class	4	225	229	200
Short & mid haul - full service economy	58	337	395	425
Short & mid haul - NFC/charter	186	353	539	425
Long haul - business class	12	104	116	100
Long haul - full service economy	61	397	458	450
<b>Total</b>	<b>400</b>	<b>1826</b>	<b>2,226</b>	<b>2,000</b>

Interviews per flight length	TU	Online	Achieved	Target Quotas
Domestic	79	410	489	400
Short haul and mid haul	248	915	1163	1,050
Long haul	73	501	574	550
<b>Total</b>	<b>400</b>	<b>1,826</b>	<b>2,226</b>	<b>2,000</b>

Interviews by cabin	TU	Online	Achieved	Target Quotas
Business/premium economy	17	397	414	400
Full service economy	132	855	987	1,025
NFC/charter	251	574	825	575
<b>Total</b>	<b>400</b>	<b>1,826</b>	<b>2,226</b>	<b>2,000</b>

Interviews by journey purpose	TU	Online	Achieved	Target Quotas
Business	41	410	451	600
Leisure/vfr	359	1416	1775	1,400
<b>Total</b>	<b>400</b>	<b>1,826</b>	<b>2,226</b>	<b>2,000</b>

Interviews by booking channel	TU	Online	Achieved	Target Quotas
Online	299	1100	1399	1,200
Travel agent	74	398	472	400
Telephone/other	27	328	355	400
<b>Total</b>	<b>400</b>	<b>1,826</b>	<b>2,226</b>	<b>2,000</b>

## 2.4 Weighting

In order to ensure that the research data is as accurate as possible i.e. not skewed by having set quotas, the final data set was weighted to reflect the proportion of total trips made by each of the groups. Accent has used the following weightings throughout the report. The weighting factors are included in Table 3. **For all tables and figures included in this report the data will be the weighted data.**

**Table 3: Weighting**

Flight Length & Cabin	Estimated proportion of UK resident passengers in category (%) <sup>1</sup>	Weighting factor applied to interviews	Unweighted number of interviews	Weighted number of interviews
Domestic - Business/First/Prem Econ	0.3	0.104	69	7
Domestic - Full service economy	5.4	0.904	134	121
Domestic - NFC/Charter	8.5	0.662	286	189
Long - Business/First/Prem Econ	2.3	0.445	116	52
Long - Full service economy (includes NFC & charter)	22	1.068	458	489
Short - Business/First/Prem Econ	1.1	0.107	229	25
Short - Full service economy	16.5	0.931	395	368
Short - NFC/charter	43.8	1.809	539	975
<b>Total</b>	<b>100</b>		<b>2,226</b>	<b>2,226</b>

Cabin	%
First/Business/Prem Econ	3.7
Economy	96.3
<b>Total</b>	<b>100</b>

Flight Length	%
Domestic	14.3
Short & Mid haul	61.4
Long haul	24.3
<b>Total</b>	<b>100</b>

Flight Purpose	%
Business	14.6
Leisure/vfr	85.4
<b>Total</b>	<b>100</b>

The standard errors in the Stated Preference analysis have taken into account the effect of weighting when calculating the t-stats and the willingness to pay ranges.

<sup>1</sup> Estimated using CAA Passenger Survey 2009 at Heathrow, Gatwick, Stansted, Luton and Manchester



## 2.5 Questionnaire Length and Content

The questionnaire took an average of 22 minutes for respondents to complete. It included a mix of background, stated preference and revealed behaviour questions.

The stated preference element was used to provide a robust assessment of the relative importance consumers place on different elements during the decision making process.

The questionnaire covered:

- Details about last flight booked:
  - Purpose
  - Channel
  - Airline type
  - Flight duration
  - Cabin
  - Airline used
  - Ticket purchased
  - Departure and destination airports – including reasons for choice and consideration of alternative airports
- Stated preference exercises
- Importance placed on access to various types of information – passenger rights, environmental, disability and refund policies
- Preferred channels for accessing information
- Historical booking behaviour
- Respondent characteristics.

### 3 FINDINGS

#### 3.1 Screening criteria

##### Overview

Trips were more typically for leisure pursuits, with the vast majority of respondent responsible for booking the flight for themselves. Hence any marketing activity relating to ticket type availability should directly target those responsible for making and undertaking the travel. By the time the survey was undertaken those who had booked a flight for business were significantly more likely to have taken the trip than those booking for leisure purposes or to visit family and friends, possibly suggesting that flights for business travel are booked closer to the departure date with more restrictive travel requirements.

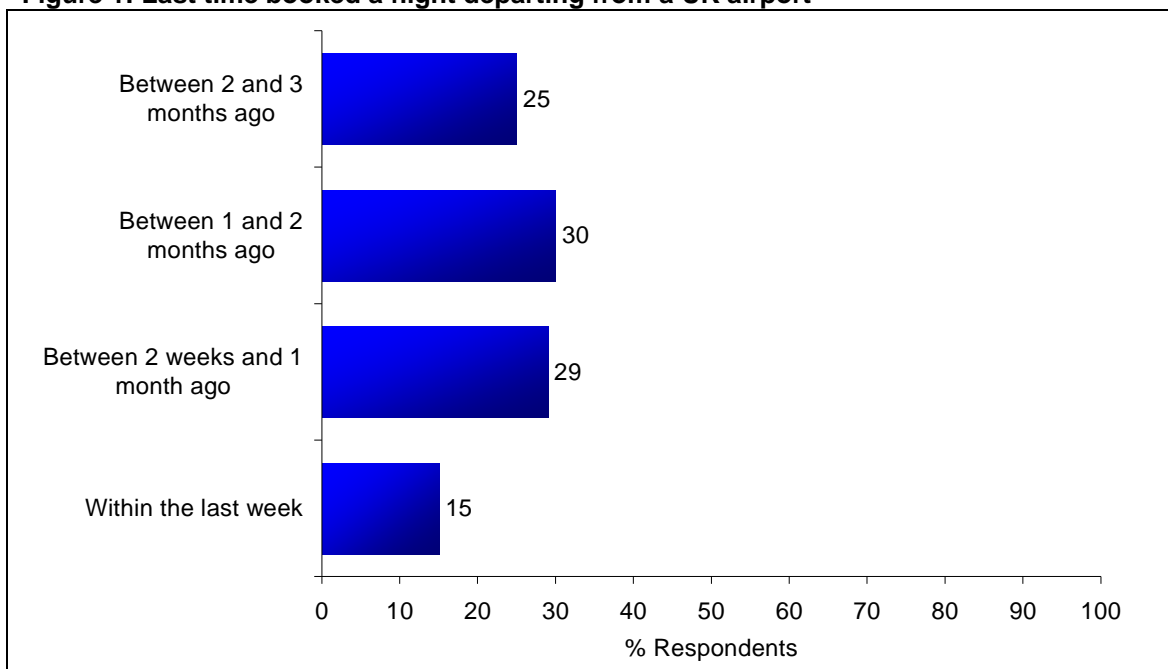
##### Main Findings

The following section shows the breakdown of respondents in terms of the screening criteria employed for this research.

##### Time Elapsed Since Last Flight Booked

Overall, as shown in Figure 1, 44% of respondents had booked a flight within the month preceding the survey, including 15% who had booked a flight within the last week.

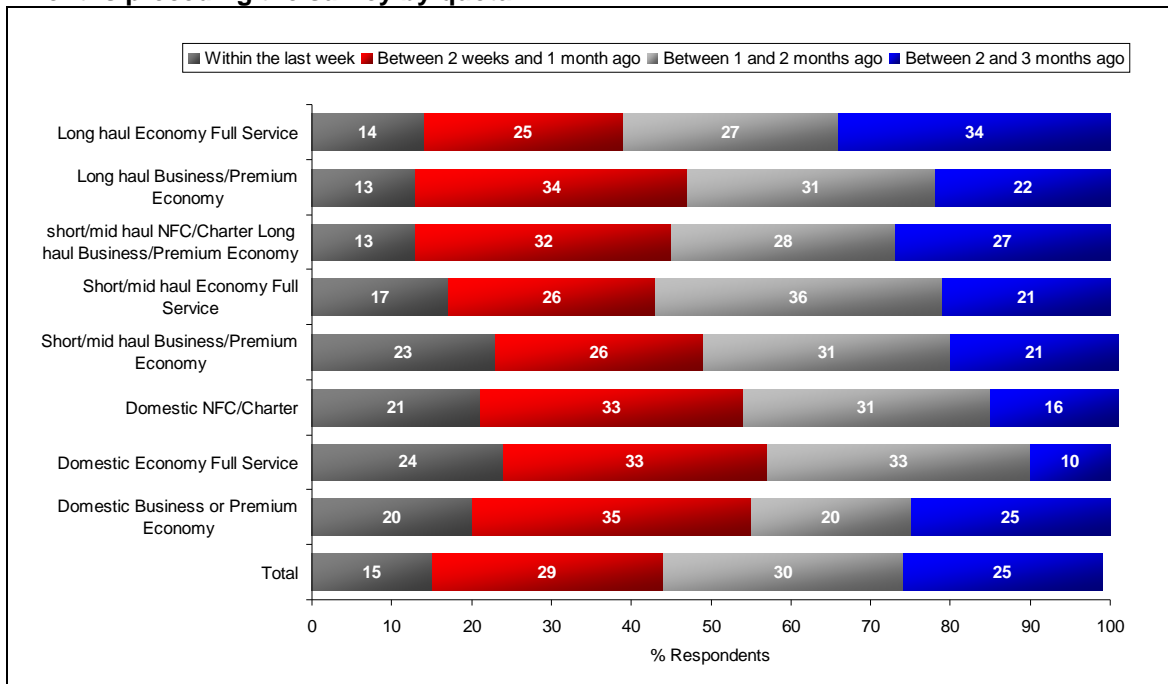
**Figure 1: Last time booked a flight departing from a UK airport**



Base: All respondents (2,226)

Respondents in the domestic economy full service quota were the most likely to have booked a flight in the month preceding the survey (57%), while those in the long haul economy full service quota were the least likely to have done so (39%). This is summarised in Figure 2 below.

**Figure 2: Respondents who had booked a flight departing from a UK airport within the 3 months preceding the survey by quota**

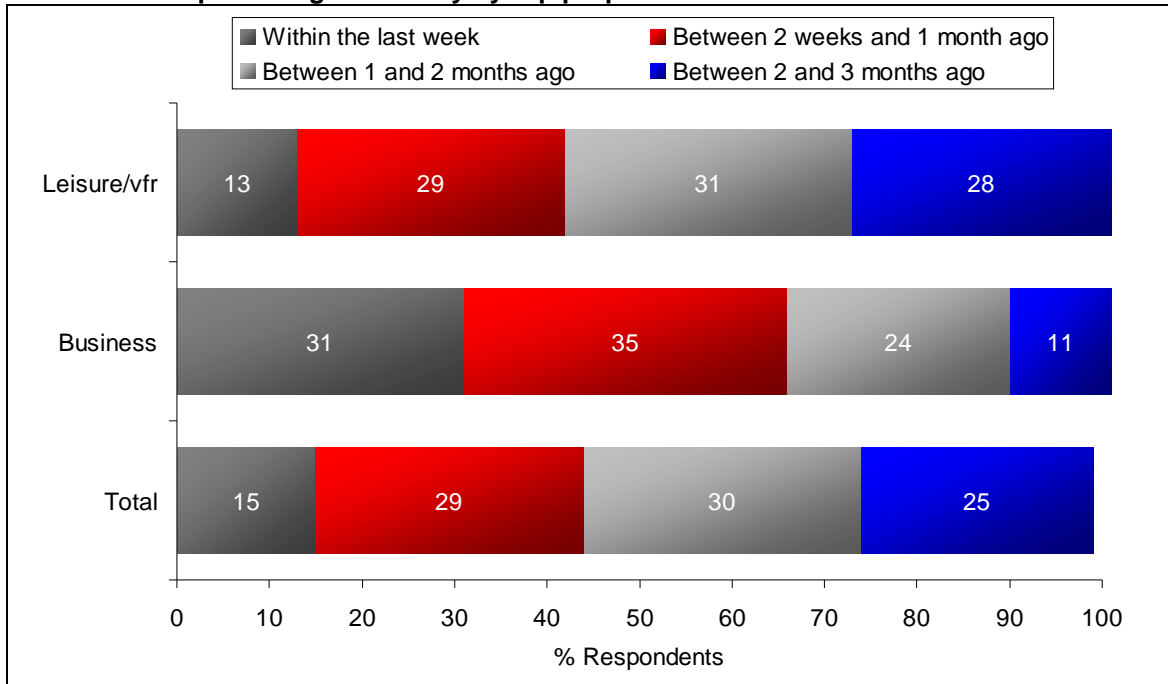


Base: All respondents (2,226); Long haul Economy full service (489), Long haul Business/Premium Economy (52), short/mid haul NFC/Charter (975); Short/mid haul Economy full service (368); Short/mid haul Business/Premium Economy (25); Domestic NFC/Charter (189); domestic economy full service (121); Domestic Business or Premium Economy (7).

## Journey Purpose of Last Flight Booked

Those whose flight was for business purposes were significantly more likely to have booked a flight in the month preceding the survey than those whose flight was for leisure purposes/visiting friends or relatives (66% and 42% respectively). Figure 3 below indicates that the respondents to the survey whose last flight was for business travelled more recently than those with a leisure journey purpose.

**Figure 3: Respondents who had booked a flight departing from a UK airport within the three months preceding the survey by trip purpose**



Base: All respondents (2,226); leisure/VFR (1,902); business (324)

Approximately one in six respondents were/would be travelling to visit friends and/or relatives while around one in seven were/would be travelling for business purposes. However, the majority of respondents were/would be travelling for leisure purposes (67%). This is shown in Table 4 below.

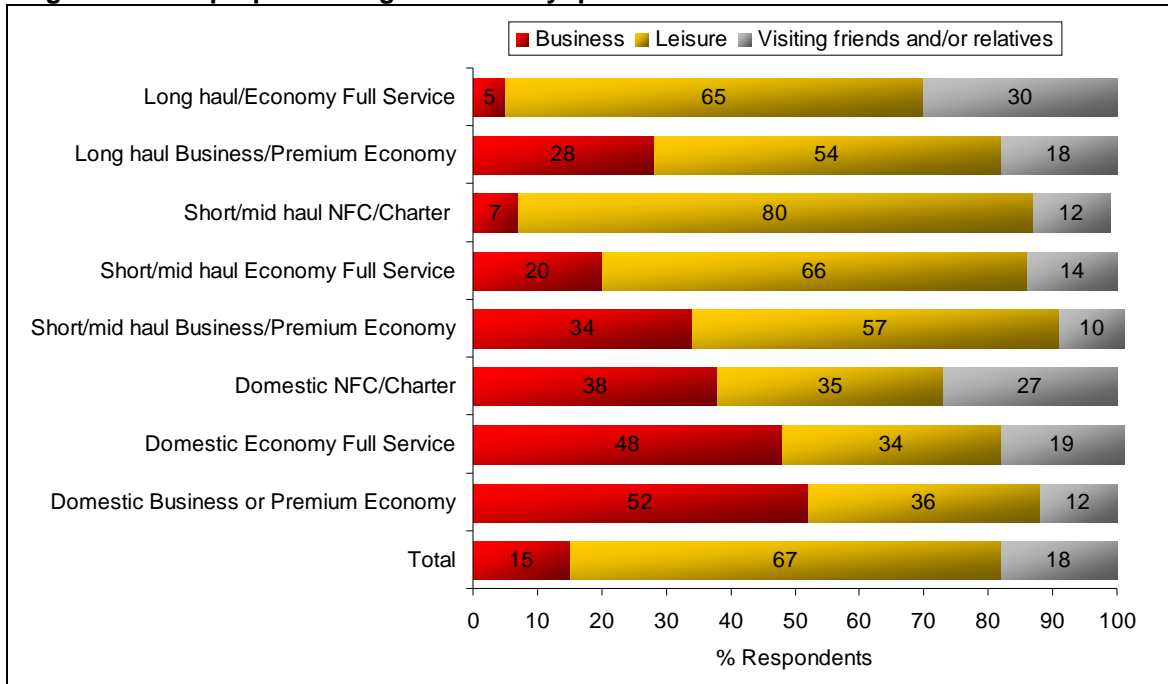
**Table 4: Main purpose of flight booked (weighted)**

	Total %
Leisure	67
Visiting friends and/or relatives	18
Business	15
<b>Base</b>	<b>2,226</b>

As summarised in Figure 4, respondents most likely to be travelling for business purposes included those in the:

- domestic business or premium economy quota (52%)
- domestic economy full service quota (48%)
- domestic NFC/charter quota (38%).

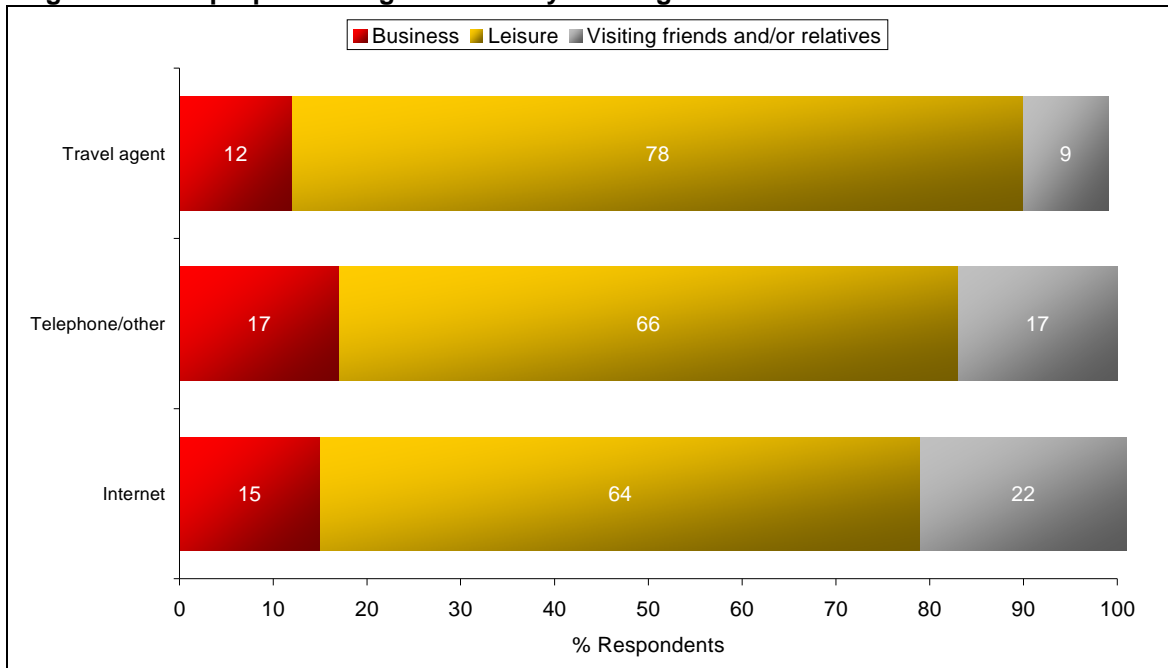
**Figure 4: Main purpose of flight booked by quota**



Base: All respondents (2,226); Long haul Economy full service (489), Long haul Business/Premium Economy (52), short/mid haul NFC/Charter (975); Short/mid haul Economy full service (368); Short/mid haul Business/Premium Economy (25); Domestic NFC/Charter (189); domestic economy full service (121); Domestic Business or Premium Economy (7).

Respondents who booked their flight through a travel agent were significantly more likely to have booked the flight for leisure purposes (78%) than those who had booked their flight over the telephone/other (66%) or on the Internet (64%). By comparison, those who had booked their flight on the Internet or over the telephone/other were significantly more likely to have booked their flight to visit friends/relatives than those who booked through a travel agent (22%, 17% and 9% respectively). This is shown in Figure 5.

**Figure 5: Main purpose of flight booked by booking channel**



Base: All respondents (2226); Internet (1,433); telephone/other (328); travel agent (465)

## Qualitative Research Findings

The qualitative research indicated that the main reasons for booking by Internet were that it was highly flexible, it was continuously available throughout the day and night, the respondent was able to personalise choices, they could change their options without feeling pressurised and it was quick and easy to use. Another benefit of the Internet was to enable respondents to filter flight details in order to get the best flight option. Conversely, those unfamiliar with the Internet might consider that it offers information overload and as a result try a different channel for booking flights. As one respondent stated:

*“I prefer to book on the Internet because I like the fact that it’s all in front of you and you can check the details but I’m pretty sure that I’ve phoned up for information over the last couple of years and ended up booking it over the phone”.*

(Leisure respondent)

The telephone approach offered respondents the opportunity to discuss their flight options, it provided a more tailored approach and was highly rated for business customers who have a dedicated travel agent relationship.

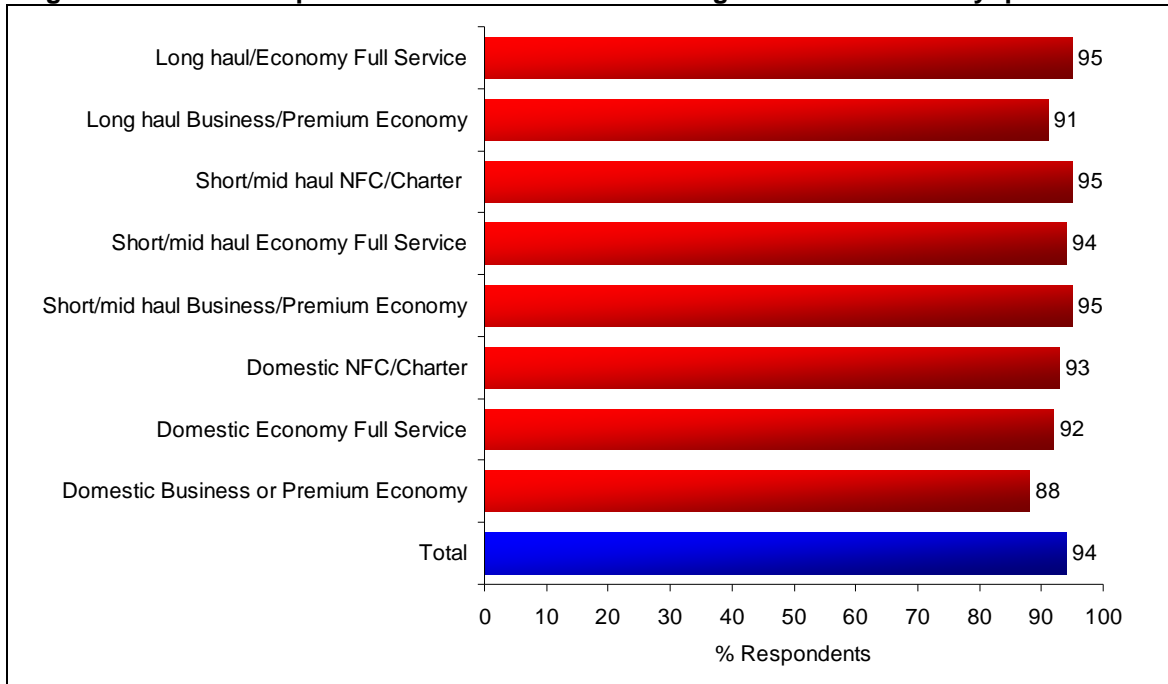
The use of mobile applications for searching for flights was mentioned in both consumer and business groups.

### Responsibility for Previous Flight Booking

The majority of respondents (94%) had booked the flight for themselves.

Those in the domestic business or premium economy quota were the least likely to have booked the flight for themselves (88%), but were the most likely of those who had booked the flight for themselves to have taken the flight (87%) at the time of the interview. This information is summarised in Figure 6.

**Figure 6: Share of respondents who had booked the flight for themselves by quota**



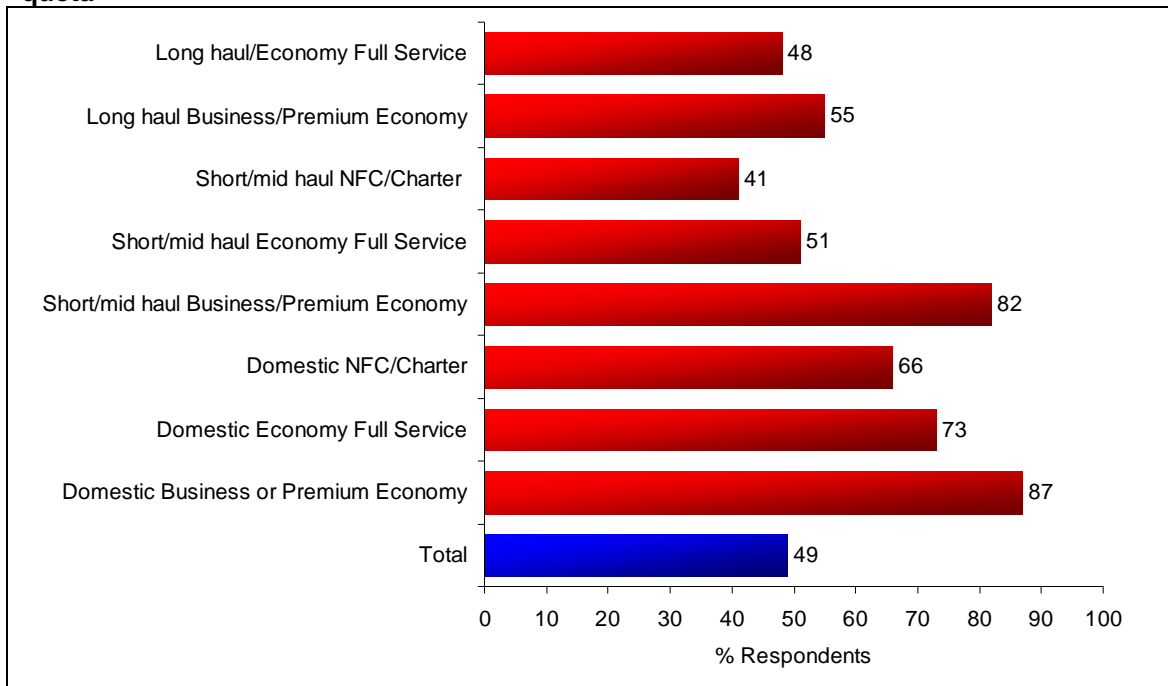
Base: All respondents (2,226); Long haul Economy full service (489), Long haul Business/Premium Economy (52), short/mid haul NFC/Charter (975); Short/mid haul Economy full service (368); Short/mid haul Business/Premium Economy (25); Domestic NFC/Charter (189); domestic economy full service (121); Domestic Business or Premium Economy (7).

## Whether Previous Flight Taken at Time of Survey or Not

Almost half of respondents (49%) had taken the flight by the time of the interview, as summarised in Figure 7.

Around half of those in the short/mid haul economy full service (51%) or long haul economy full service (48%) quotas had taken the flight.

**Figure 7: Share of respondents who had taken the flight at the time of the survey by quota**

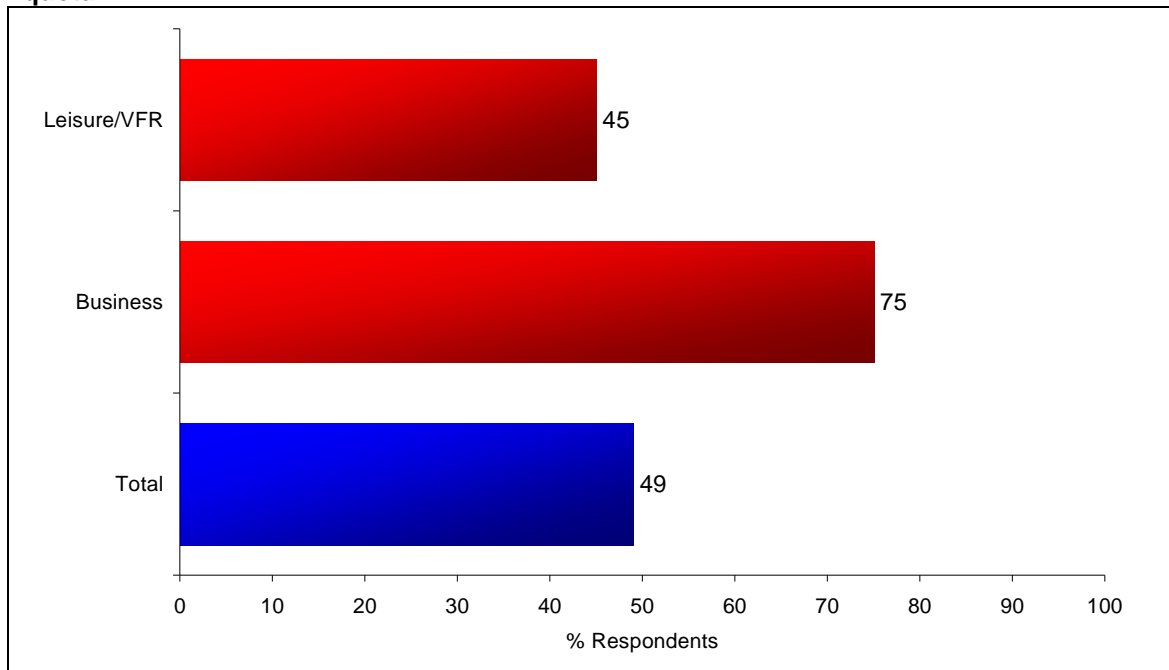


Base: All respondents who had booked a flight for themselves (2,104); Long haul economy full service (464), Long haul Business/Premium Economy (47), short/mid haul NFC/Charter (928); Short/mid haul Economy full service (347); Short/mid haul Business/Premium Economy (23); Domestic NFC/Charter (177); domestic economy full service (111); Domestic Business or Premium Economy (6).



Respondents who had booked a flight for themselves for business purposes were significantly more likely to have taken the flight at the time of the survey than those who had done so for leisure purposes or for visiting friends/relatives, as shown in Figure 8 below.

**Figure 8: Share of respondents who had taken the flight at the time of the survey by quota**



Base: All respondents who had booked a flight for themselves (2,104); leisure/VFR (1,801); business (303)

## 3.2 Last flight booked

### Overview

Respondents showed a strong preference for booking flights on the Internet especially those travelling in domestic NFC charter flights. For those booking on the Internet the focus was on securing the cheapest flight available and on purchasing a return ticket. The key drivers for selecting both the departure and the destination airport were the availability of flight route and the cost and convenience of getting to the airport.

Hence respondents key requirements for their air travel is in ensuring minimal cost and minimal personal disruption, and in ensuring that this travel is carried out as efficiently as possible.

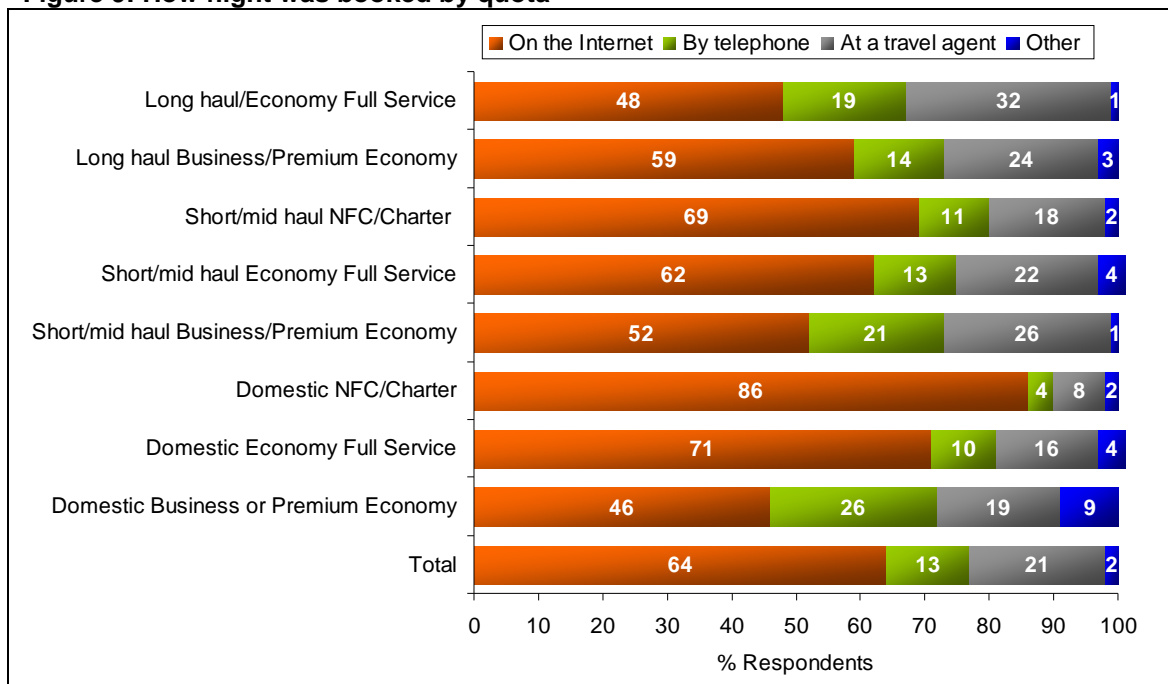
### Main Findings

#### Booking Channel for Last Flight Booked

Just less than two-thirds of respondents (64%) booked their flight over the Internet. A further 21% booked at a travel agent and 13% had booked by telephone, as indicated in **Figure 9**.

Respondents most likely to have booked their last flight at a travel agent included those in the long haul economy full service quota (32%), while those most likely to have booked by telephone included those in the domestic business or premium economy quota (26%).

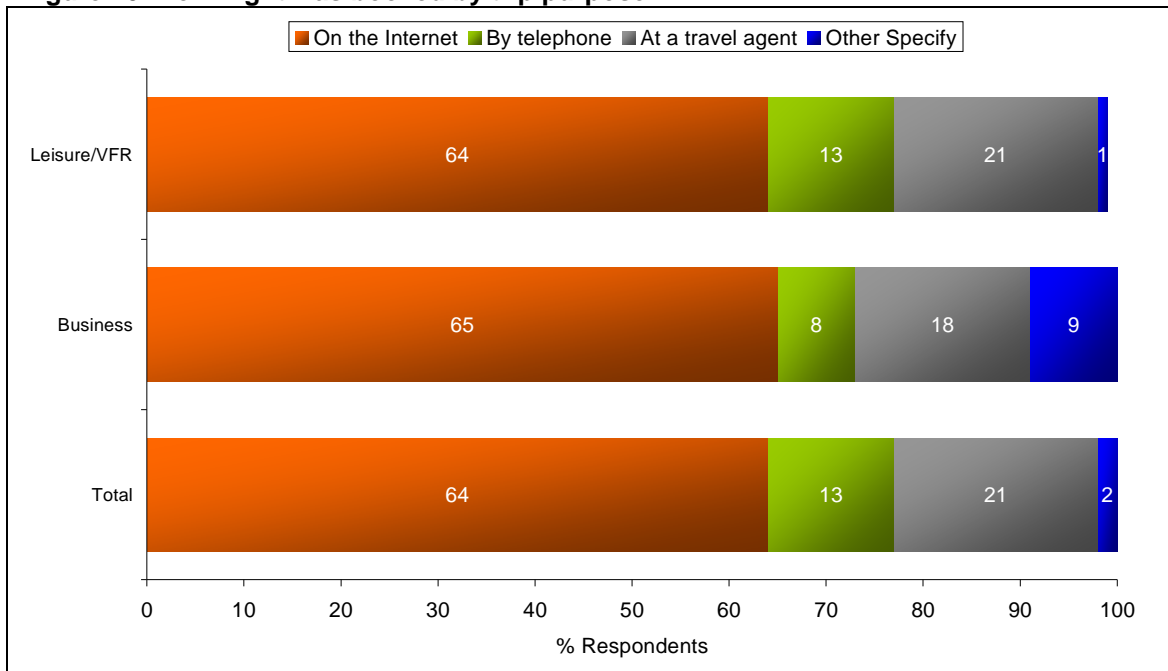
**Figure 9: How flight was booked by quota**



Base: All respondents (2,226); Long haul economy full service (489), Long haul Business/Premium Economy (52), short/mid haul NFC/Charter (975); Short/mid haul Economy full service (368); Short/mid haul Business/Premium Economy (25); Domestic NFC/Charter (189); domestic economy full service (121); Domestic Business or Premium Economy (7).

Leisure/VFR respondents were as likely to have booked their trip by telephone or with a travel agent as business respondents, as shown in **Figure 10**.

**Figure 10: How flight was booked by trip purpose**



Base: All respondents (2,226); leisure/VFR (1,902); business (324)

### Choice of Departure Airport for Last Flight Booked

One in five respondents (20%) departed/will depart from Heathrow Airport. Other common departure airports include Gatwick (15%), Manchester (14%) and Birmingham (7%) as shown in Table 5.

**Table 5: Departure airport (weighted)**

	Total %
Heathrow	20
Gatwick	15
Manchester	14
Birmingham	7
Edinburgh	5
Glasgow	5
Stansted	5
Bristol	4
Newcastle	4
Belfast City	3
East Midlands	3
Liverpool	3
Luton	3
Aberdeen	2
London City	2
Other	6
<b>Base</b>	<b>2,226</b>

Around half of all respondents (51%) considered other departure airports. Those most likely to do so included those in the domestic business or premium economy quota (61%), while those least likely to do so included those in the domestic economy full service (45%) or domestic NFC/charter (44%) quotas.

There was no notable difference in consideration of other departure airports between those booking a flight for business purposes and those booking for leisure purposes or to visit friends/relatives.

Those who had considered other departure airports were asked why they decided to use the departure airport they selected. Key reasons for selecting the departure airport are availability of flight route (56%) and the cost and convenience of getting to the airport (55%).

Respondents in the domestic business or premium economy quota are the most likely to have considered availability of the flight route (79%) and airport facilities (36%). Those in the long haul economy full service quota are the most likely to have considered the cheapest flight available (39%), while cost and convenience of getting to the airport was most likely to have been considered by the long haul business/premium economy quota (70%) and the domestic economy full service quota (65%). This is summarised in Table 6.

It is noticeable for the business travellers that the overall ease and comfort all of aspects of the journey were key features of their travel arrangements in both the initial qualitative research and in the quantitative research. However, the qualitative research also illustrated that this need to ensure employees were capable of working effectively was tempered by a pragmatism which meant that value for money should also be considered in this time of economic expediency. The qualitative research alluded to the need for some austerity when booking air travel although there were exclusions to the rules in place, for example, based upon seniority or duration of travel.

**Table 6: Reasons for selecting departure airport by quota (weighted)**

	Total %	Domestic Business or Premium Economy %	Domestic Economy Full Service %	Domestic NFC/Charter %	Short/ mid haul Business/Premium Economy %	Short/ mid haul Economy Full Service %	Short/ mid haul NFC/Charter %	Long haul Business/Premium Economy	Long haul Economy Full Service %
Availability of flight route	56	79	52	53	72	63	52	57	60
Cost and convenience of getting to airport	55	48	65	58	52	56	54	70	53
Cheapest flight available	33	12	17	30	17	32	34	25	39
Airport facilities	8	36	13	9	39	8	6	25	8
Other	4	-	10	3	1	6	4	2	4
<b>Base</b>	<b>1,140</b>	<b>4</b>	<b>54</b>	<b>83</b>	<b>16</b>	<b>195</b>	<b>508</b>	<b>27</b>	<b>253</b>

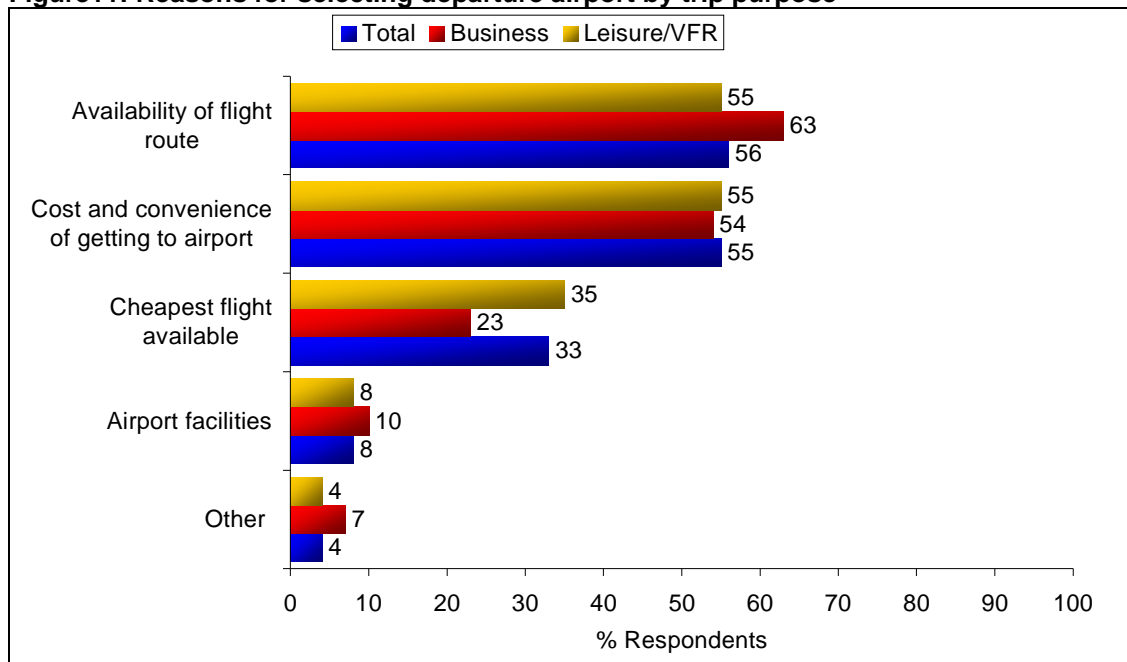
## Qualitative Findings

In the qualitative research, as indeed here, the requirement for value for money from their air ticket was especially evident for long haul travellers.

### Reasons for Selecting Departure Airport

Respondents travelling for business purposes were more likely to consider the availability of the flight route (63%, compared with 55% of those travelling for leisure/visiting friends/relatives) while those travelling for leisure or to visit friends/relatives were significantly more likely to consider the cost of the flight (35%, compared with 23% of business travellers). This is shown in **Figure11**.

**Figure11: Reasons for selecting departure airport by trip purpose**

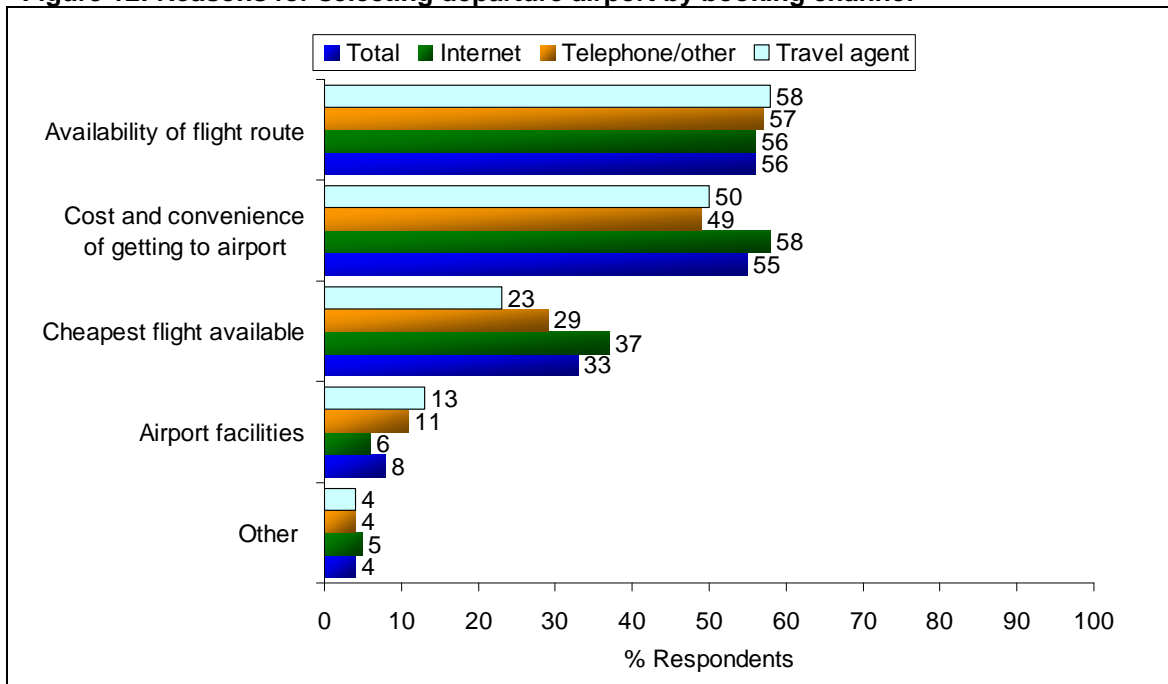


Base: Those who considered other departure airports when booking this flight (1,140); business (158); leisure/VFR (982)

Respondents who booked online were significantly more likely to have considered getting the cheapest flight available (37%, compared with 29% of those who booked by telephone/other and 23% of those who booked with a travel agent), as shown in **Figure 12**.

By comparison, respondents who booked the flight online were less likely to have considered airport facilities when selecting the departure airport (6%) than those booking by telephone/other (11%) or with a travel agent (also 13%).

**Figure 12: Reasons for selecting departure airport by booking channel**



Base: Those who considered other departure airports when booking this flight (1,140); Internet (750); telephone/other (169); travel agent (221)

Approximately one in seven respondents (14%) had taken/were taking a non-direct flight that involved changes. Not surprisingly, this was more common among respondents in the long haul economy full service and long haul business/premium economy quotas (41% and 24% respectively). Non-direct flights were also more common among those who had booked the flight by telephone/other (20%) or with a travel agent (17%) than those who had booked the flight on the Internet (12%).

### Relevant Qualitative Findings

The qualitative research also indicated that leisure travellers were more likely than business travellers to include a greater time investment up front in order to review the best available flights and in doing so ensure a greater financial saving in the long run.

## Choice of Destination Airport for Last Flight Booked

Table 7 below shows destination airports of flights booked by respondents. Only those mentioned by at least 2% of respondents are shown below (all destination airports are included in Appendix 2). The main destination airports are London Heathrow, Alicante and Malaga airport each with 3%.

**Table 7: Destination airport (weighted)**

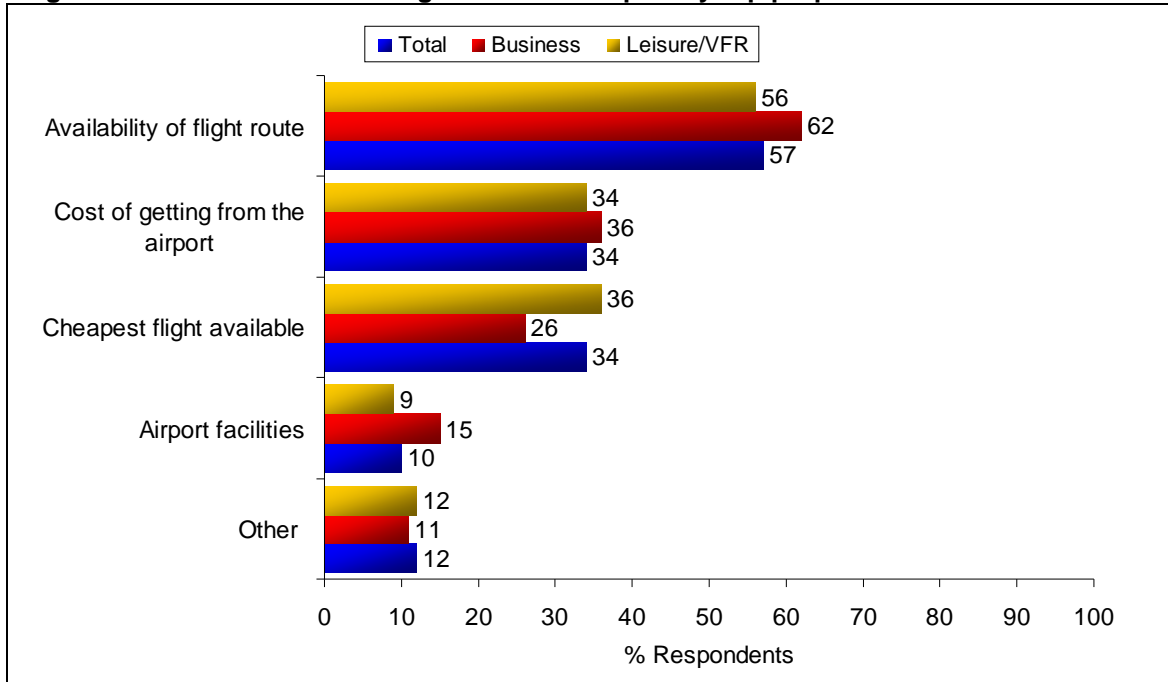
	Total %
Alicante	3
London Heathrow	3
Malaga	3
Amsterdam Airport Schiphol	2
Faro	2
Lanzarote (Arrecife)	2
Tenerife South (Reina Sofia)	2
Other	83
<b>Base</b>	<b>2,226</b>

Consideration of destination airports is significantly lower than departure airport with only 21% of respondents stating that they considered other destination airports, compared to 51% for departure. The quota groups most likely to consider other destination airports were short/mid haul Business Premium Economy (37%) and domestic business or premium economy (36%). This is specified in **Figure 13**.

The main reasons for selecting destination airports for those who considered an alternative mirror those reasons given for selecting the departure airport – namely the availability of flight route (57% of respondents considering this factor) and the cost and convenience of getting from the airport (34%). This is a useful finding as it provides some indication as to the likely behaviour of foreign residents using UK airports.

Again, respondents travelling for business purposes were more likely to consider the availability of the flight route (62%, compared with 56% of those travelling for leisure/visiting friends/relatives) and/or airport facilities (15%, compared to 9% of those travelling for leisure/visiting friends/relatives) while those travelling for leisure or to visit friends/relatives were more likely to consider the cost of the flight (36%, compared with 26% of business travellers).

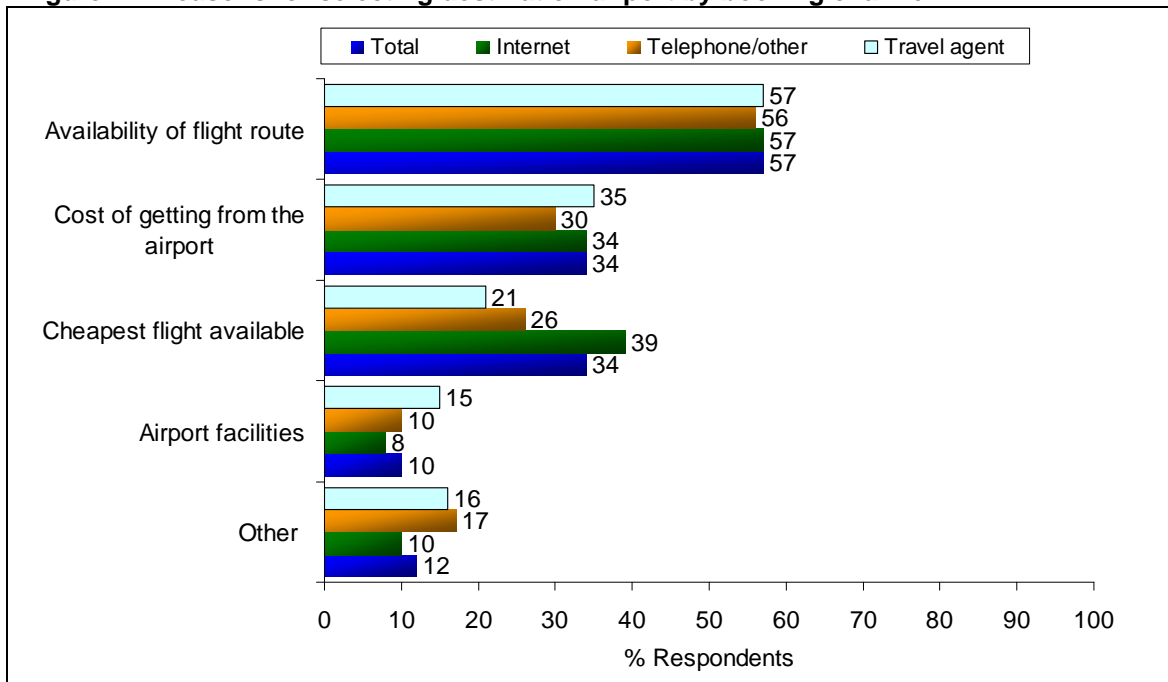
**Figure 13: Reasons for selecting destination airport by trip purpose**



Base: Those who considered any other airports at or near the same destination (474); business (80); leisure/VFR (395)

Again, respondents who booked online were significantly more likely to have considered getting the cheapest flight available (39%, compared with 26% of those who booked by telephone/other and 21% of those who booked with a travel agent). This is summarised in Figure 14.

**Figure 14: Reasons for selecting destination airport by booking channel**



Base: Those who considered any other airports at or near the same destination (474); Internet (340); telephone/other (50); travel agent (84)



Respondents in the long haul business/premium economy quota are the most likely to have considered availability of the flight route (75%), as shown in Table 8. Those in the long haul economy full service quota are the most likely to have considered the cheapest flight available (43%).

**Table 8: Reasons for selecting destination airport by quota (weighted)**

	Total %	Domestic Business or Premium Economy %	Domestic Economy Full Service %	Domestic NFC/Charter %	Short/ mid haul Business/Premium Economy %	Short/ mid haul Economy Full Service %	Short/ mid haul NFC/Charter %	Long haul Business/Premium Economy	Long haul Economy Full Service %
Cost of getting from the airport	34	44	37	42	46	38	38	39	20
Availability of flight route	57	64	61	53	66	58	50	75	65
Airport facilities	10	16	12	7	34	11	6	21	12
Cheapest flight available	34	12	32	42	9	31	30	11	43
Other	12	8	12	11	2	14	12	4	11
<b>Base</b>	<b>474</b>	<b>3</b>	<b>37</b>	<b>64</b>	<b>9</b>	<b>66</b>	<b>163</b>	<b>12</b>	<b>121</b>

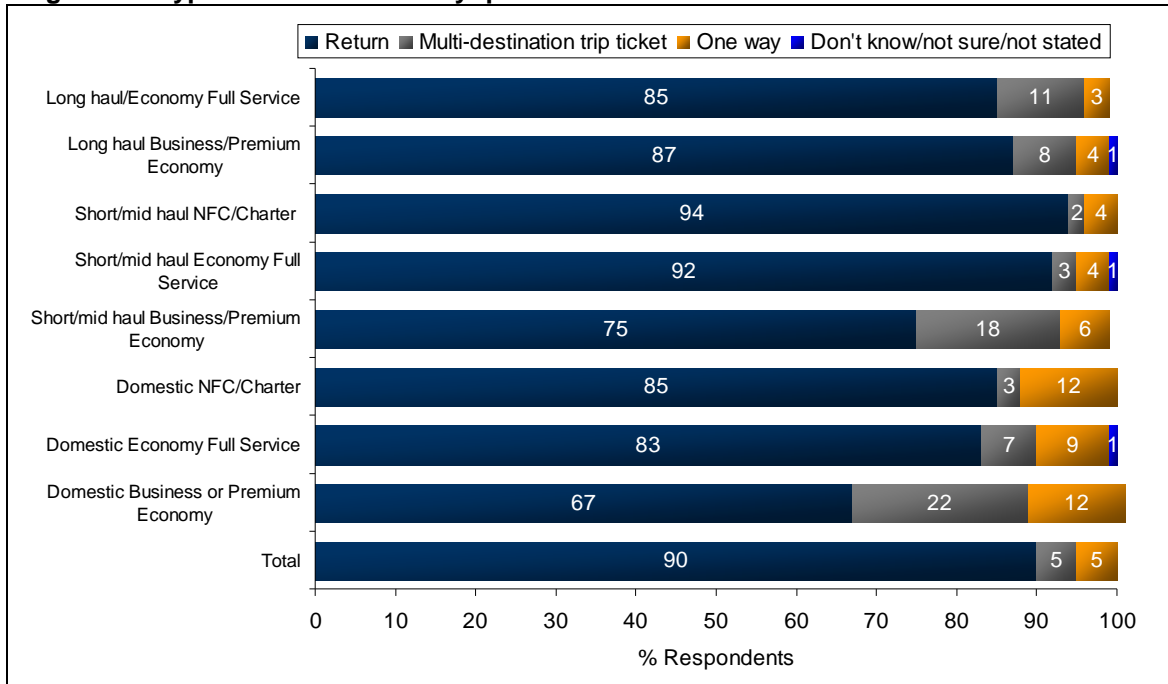
Base: Those who considered any other airports at or near the same destination (474)

## Ticket Type for Last Trip Booked

Most respondents (90%) had booked a return ticket. Five percent booked a multi-destination trip ticket.

Those respondents in the domestic business or premium economy quota were the least likely to have booked a return ticket (67%) and were more likely to have booked a multi-destination trip ticket (22%). This is summarised in **Figure 15**.

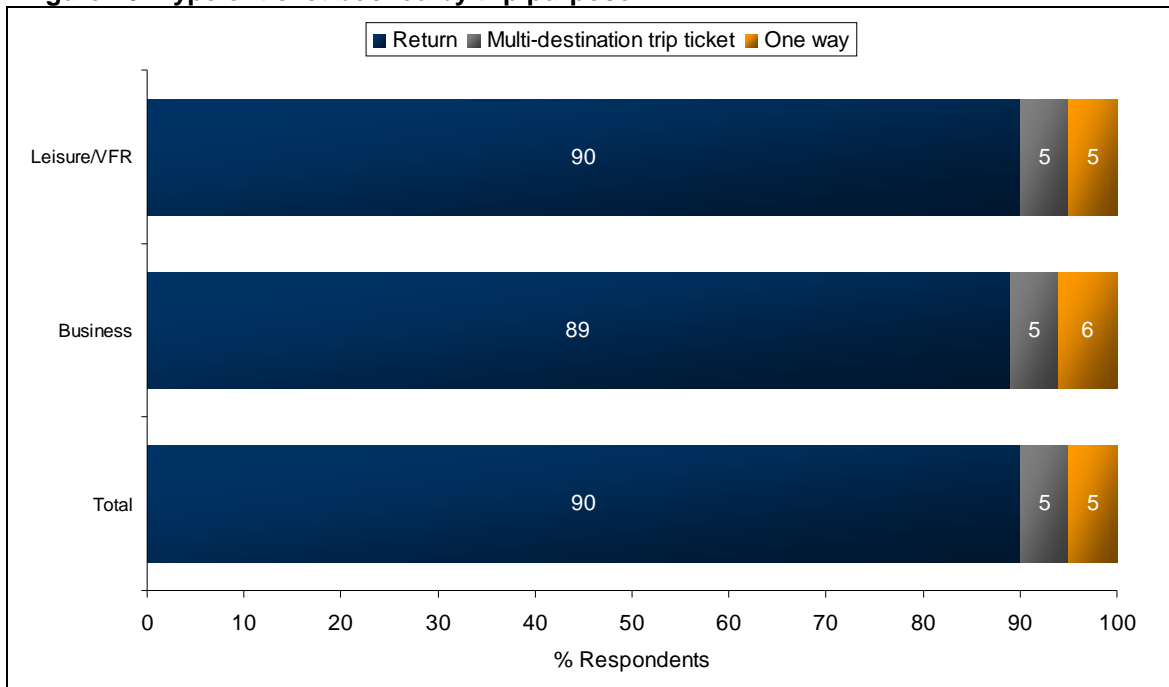
**Figure 15: Type of ticket booked by quota**



Base: All respondents (2,226); Long haul economy full service (489), Long haul business/Premium Economy (52), short/mid haul NFC/Charter (975); Short/mid haul Economy full service (368); Short/mid haul Business/Premium Economy (25); Domestic NFC/Charter (189); domestic economy full service (121); Domestic Business or Premium Economy (7).

The type of ticket booked was similar for both business and leisure/VFR respondents, as presented in **Figure 16**.

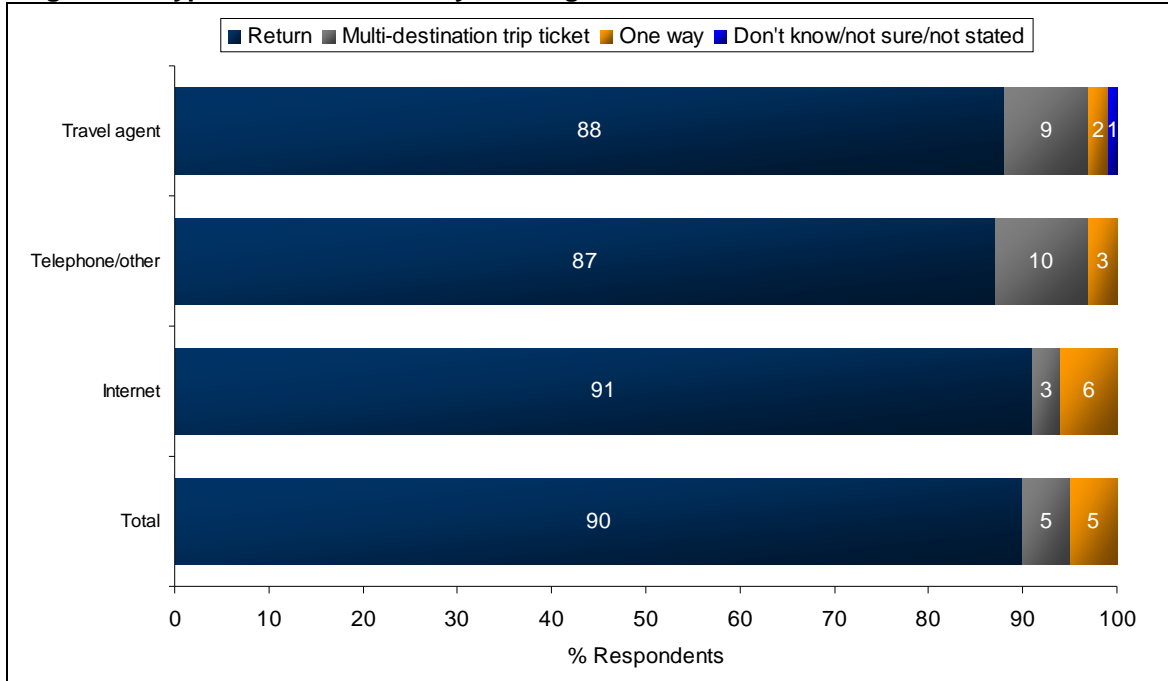
**Figure 16: Type of ticket booked by trip purpose**



Base: All respondents (2,226); leisure/VFR (1,902); business (324)

Respondents who had booked the flight on the Internet were significantly more likely to have booked a return ticket (91%) than those who had booked at a travel agent (88%) or by telephone/other (87%). By comparison, those booking by telephone/other or with a travel agent were significantly more likely to have booked a multi-destination trip ticket (10% and 9% respectively) than those booking online (3%). This information is included in **Figure 17**.

**Figure 17: Type of ticket booked by booking channel**



Base: All respondents (2,226); Internet (1,433); telephone/other (328); travel agent (465)

## Airline Choice for Last Flight Booked

Table 9 below shows the airlines respondents booked with. Only those airlines mentioned by at least 1% of respondents are shown.

**Table 9: Airline booked with (weighted)**

	Total %
EasyJet	18
British Airways	16
Ryanair	11
Thomas Cook	10
Thomson Airways	9
Virgin Atlantic	6
BMI British Midland	5
Flybe	5
Monarch	5
Aer Lingus	3
Emirates	3
Jet2.com	3
KLM	3
Lufthansa	3
Air Canada	2
American Airlines	2
Continental	2
SAS	1
Swiss Airlines	1
Wizz Air	1
Air France	1
Delta	1
Qantas/Jetstar	1
Other	17
<b>Base</b>	<b>2,226</b>

## Qualitative Research Findings

The qualitative research indicated that the majority of companies had long established relationships with travel agents who had, for example, negotiated preferential rates with certain airlines or who had ‘preferred partners’ for specific routes. This removed the element of choice when travel along these routes. For example one business respondent had said:

*“British Airways and Virgin are used due to what we negotiated price wise. The travel firms are able to negotiate because of their buying power as they have a lot of people using them. We’ve also got American Airlines and Emirates for going to Dubai”.*

The qualitative research also revealed that when respondents needed to travel to a new destination, whether for leisure or business, they need a core set of information which included who flies there, airport information, the connections available and price. Respondents may go to comparison websites in order to compare the price of several airlines.

However, if the trips is a frequently made one, both leisure and business travellers already have the core information about the flight at their disposal. That said, respondents may still check one additional airline to endure cost efficiency.

The qualitative research identified the 'final cost' as the key consideration in selection air travel. Linked to this the critical factors impacting on airline selection were the airline timetable, whether there was a direct flight, the airport (origin/destination) and punctuality. There was a concern that transparency to ticket price information was difficult to achieve – particularly on many of the travel price comparison web sites.

However, the qualitative research also illustrated the importance of brand awareness and brand evaluation in the respondents airline selection process, although it is may be a sub-conscious filter.

Distinctions were also made according to service and past experience. Further 'persuasive factors' included ticketing options, service quality and complaints handling which although not critical could impact on airline selection.

### 3.3 Stated Preference Data (Log Cost Analysis)

#### Background Theory

In principle there are two preference elicitation techniques namely Revealed Preference and Stated Preference. Revealed preference (RP) technique where customers reveal what they have actually chosen among the available products/services in the market. Stated Preference (SP) refers to observation of preferences stated against real and/or hypothetical products/services. SP facilitates inclusion of hypothetical attributes and variability of attributes. While RP requires huge data, SP requires fewer observations than the RP technique to generate the models that mimic the behaviour of the customers. In addition, it allows complete control over choices offered and their attributes and ensures sufficient variation in data.

However, there are potential issues/weaknesses with SP (as reported in literature). It is possible that what people state in a hypothetical scenario may not be done if it becomes reality and that this tends to inflate the willingness to pay values. Researchers argue that a carefully designed and executed SP can overcome these issues.

Ranking, rating and discrete choice experiments (DCE) are the three variants of SP. The most commonly used SP technique is the DCE as is the simplest of the choice techniques and thus has the lowest cognitive complexity – the degree of task complexity and difficulty arising from the experiment. The DCE experiments provide a framework for estimating the relative marginal disutility of variations in attributes, and their potential correlations. The DCE method involves consumers making mutually exclusive choices from a set of substitutable goods/services. In DCE, respondents have to choose one alternative out of two or more alternatives.

The advantages of SP, especially the provision for including the hypothetical scenarios, have encouraged practitioners and researchers to employ them in wide range of fields such as transportation, utilities, environmental valuations, health sector etc.

#### Methodology

All survey respondents were asked to undertake a series of trade off (Stated Preference) exercises which sought to assess the relative importance and associated willingness to pay for a range of airport choice and airline information.

In this study respondents were shown a series of four exercises where they were asked to make choices between different criteria that relate to airport choice and airline information. These covered aspects of a **fictional journey** similar to the one the respondent last booked (so, for example, if they booked a short haul flight with a budget airline they were shown “a fictional flight from a UK airport to a European location with a flight time of between 1 and 3 hours [for example Paris, Amsterdam or Barcelona] with a budget/low cost airline”).

For each exercise they were shown four different sets of flight choices where these criteria varied. When making their choices respondents were asked to assume that all other aspects of the journey which were not mentioned were the same.

The cost of the flight was also shown for a return ticket and included all taxes.

Two example choice sets are shown below:

Interview Tools

### Your flight options

Flight Distance: UK Domestic | Airline: Budget or charter

	Shopping facilities at the departure airport (More Info.)	Walking distance at the airport (More Info.)	On-board service (More Info.)	Check-in queues (More Info.)	Cost (return fare including all taxes)	
A	Less than 10 shops	20 minutes	none	25 minutes	£80.00	<input checked="" type="radio"/> 1. Flight A
B	10 to 30 shops	5 minutes	soft drinks and cold snacks	45 minutes	£76.00	<input type="radio"/> 2. Flight B

	Shopping facilities at the departure airport (More Info.)	Walking distance at the airport (More Info.)	On-board service (More Info.)	Check-in queues (More Info.)	Cost (return fare including all taxes)	
A	Greater than 30 shops	1 minute	none	45 minutes	£86.00	<input type="radio"/> 1. Flight A
B	10 to 30 shops	15 minutes	soft drinks and cold snacks	35 minutes	£76.00	<input checked="" type="radio"/> 2. Flight B

	Shopping facilities at the departure airport (More Info.)	Walking distance at the airport (More Info.)	On-board service (More Info.)	Check-in queues (More Info.)	Cost (return fare including all taxes)	
A	10 to 30 shops	15 minutes	soft drinks and cold snacks	35 minutes	£74.00	<input checked="" type="radio"/> 1. Flight A

Interview Tools

### Your flight options

Flight Distance: UK Domestic | Airline: Budget or charter

	Journey time to departure airport (More Info.)	Punctuality (More Info.)	Baggage Allowance (More Info.)	On-line check-in (More Info.)	Cost (return fare including all taxes)	
A	90 minutes	95%	£20 for one 10kg checked-in bag and one 10kg cabin bag	Not available	£80.00	<input type="radio"/> 1. Flight A
B	60 minutes	55%	£20 for one 15kg checked-in bag and one 10kg cabin bag	Available	£80.00	<input type="radio"/> 2. Flight B

	Journey time to departure airport (More Info.)	Punctuality (More Info.)	Baggage Allowance (More Info.)	On-line check-in (More Info.)	Cost (return fare including all taxes)	
A	60 minutes	65%	£20 for one 20kg checked-in bag and one 5kg cabin bag	Available	£84.00	<input type="radio"/> 1. Flight A
B	90 minutes	75%	£20 for one 15kg checked-in bag and one 10kg cabin bag	Not available	£76.00	<input type="radio"/> 2. Flight B

If respondents wished to see further details about any of the criteria in the choices they were able to click on the “information” or “hover” button under the relevant heading.



The thirteen attributes tested were divided across the first three exercises. Their associated levels are shown in the table below:

**Table 10: Attributes and levels in the Stated Preference design**

<p><b>JOURNEY TIME TO THE DEPARTURE AIRPORT:</b></p> <ul style="list-style-type: none"> <li>• Average length of journey to airport, regardless of transport mode</li> <li>• Shown to respondents in minutes</li> <li>• A continuous variable with times from 15 to 120 minutes</li> </ul>
<p><b>AIRLINE PUNCTUALITY:</b></p> <ul style="list-style-type: none"> <li>• Percentage of all flights with chosen airline departing on time (less than 15 minutes delay) from departing airport in previous 12 mths</li> <li>• Shown to respondents as a percentage</li> <li>• A continuous variable with percentages between 50 and 95</li> </ul>
<p><b>BAGGAGE ALLOWANCE:</b></p> <ul style="list-style-type: none"> <li>• Business class/Premium economy <ul style="list-style-type: none"> <li>- Free allowance (two 23kg checked-in bags and two 6kg cabin bags)</li> <li>- Free allowance (up to 40kg checked-in luggage and two 7kg cabin bags)</li> <li>- Free allowance (two 23kg checked-in bags and three 6kg cabin bags)</li> <li>- Free allowance (two 32kg checked-in bags and two 6kg cabin bags)</li> </ul> </li> <li>• Economy <ul style="list-style-type: none"> <li>- Free allowance (one 23kg checked-in bag and one 6kg cabin bag)</li> <li>- Free allowance (one 20kg checked-in bag and one 10kg cabin bag)</li> <li>- Free allowance (one 23kg checked-in bag and one 8kg cabin bag)</li> <li>- Free allowance (one 30kg checked-in bag and one 7kg cabin bag)</li> </ul> </li> <li>• No frills/charter <ul style="list-style-type: none"> <li>- £20 for 10kg checked-in bag and one 10kg cabin bag</li> <li>- £20 for one 20kg checked-in bag and one 5kg cabin bag</li> <li>- £20 for one 15kg checked-in bag and one 10kg cabin bag</li> <li>- £20 for one 22kg checked-in bag and one 10kg cabin bag</li> </ul> </li> </ul>
<p><b>ON-LINE CHECK-IN:</b></p> <ul style="list-style-type: none"> <li>• Not available</li> <li>• Available</li> </ul>
<p><b>SECURITY QUEUES AT THE DEPARTURE AIRPORT:</b></p> <ul style="list-style-type: none"> <li>• Average queuing time in minutes</li> <li>• Shown to respondents in minutes</li> <li>• A continuous variable with times from zero to 30 minutes</li> </ul>
<p><b>LUGGAGE DELIVERY:</b></p> <ul style="list-style-type: none"> <li>• Lost bags per 1,000 passengers: <ul style="list-style-type: none"> <li>- Zero</li> <li>- 10</li> <li>- 20</li> <li>- 30</li> <li>- 40</li> </ul> </li> </ul>
<p><b>CANCELLATION POLICY:</b></p> <ul style="list-style-type: none"> <li>• All flights are non refundable</li> <li>• If you cancel your flight you will be refunded government taxes, subject to an administration fee</li> <li>• If you cancel your flight you will be refunded government taxes with no administration fee</li> </ul>

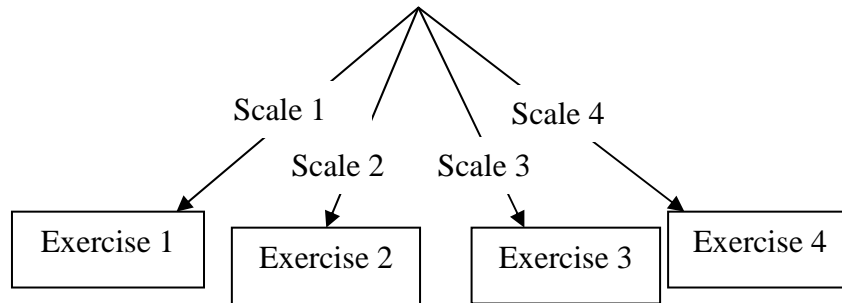
<p><b>ENVIRONMENTAL IMPACT OF FLYING (THIS WAS SHOWN AS A RATING FROM A TO F WHERE A INDICATED A FLIGHT WITH THE LOWEST IIMPACT AND F A FLIGHT WITH THE HIGHEST IMPACT):</b></p> <ul style="list-style-type: none"> <li>• A = lowest impact</li> <li>• B</li> <li>• C</li> <li>• D</li> <li>• E</li> <li>• F</li> <li>• G = highest impact</li> </ul>
<p><b>SHOPPING FACILITIES AT THE DEPARTURE AIRPORT:</b></p> <ul style="list-style-type: none"> <li>• Less than 10 shops</li> <li>• 10 to 30 shops</li> <li>• More than 30 shops</li> </ul>
<p><b>WALKING DISTANCE AT THE DEPARTURE AIPORT:</b></p> <ul style="list-style-type: none"> <li>• Length of time taken to walk to the departure gate once through security</li> <li>• Shown to respondents in minutes</li> <li>• A continuous variable from 1 to 20 minutes</li> </ul>
<p><b>ON-BOARD SERVICE DURING THE FLIGHT:</b></p> <ul style="list-style-type: none"> <li>• NFC/Charter: <ul style="list-style-type: none"> <li>- None</li> <li>- Soft drinks only</li> <li>- Soft drinks and cold snack</li> </ul> </li> <li>• Full service: <ul style="list-style-type: none"> <li>- Soft drinks and cold snacks</li> <li>- Soft drinks and hot meals</li> <li>- Soft and alcoholic drinks and hot meals</li> </ul> </li> </ul>
<p><b>CHECK-IN QUEUES AT THE DEPARTURE AIRPORT:</b></p> <ul style="list-style-type: none"> <li>• Length of time to check in at airport</li> <li>• Shown to respondents in minutes</li> <li>• A continuous variable from 10 to 60 minutes</li> </ul>
<p><b>TICKET COST:</b></p> <ul style="list-style-type: none"> <li>• Based on a range of fares provided by CAA varying by cabin, airline type and flight length</li> <li>• A continuous variable from -15% and +15% of provided fares</li> </ul>

The final exercise brought together all of the different aspects covered in the previous exercises. In this final exercise respondents were asked to trade off the “best” or “worst” levels of each of the attributes in order to scale (or factor) the willingness to pay values calculated from the individual exercises.

The model that is used in bringing the data sets together is a nested logit framework as shown below. A Nested Logit model was initially developed to overcome the weakness of multinomial logit model and later on extended to combine different data sets. When respondents see different sets of choice scenarios/experiments with different sets of attributes, the complexity associated with each experiment is different and is likely to result in variation in the random error.

In order to control/take into account variation in the random errors, a nested logit structure is used. However, the condition that should be met with to do so is that there

should at least be one common parameter in the data sets. Scale parameter (inversely proportional to the random error) for one of the data sets is fixed to unity and scales for the other data sets are estimated relative to it to check whether there is any difference between error variances and hence the data sets/responses.



It was observed that there is a possibility of WTPs being inflated at the lower level exercises. Factoring is a technique used to rescale the parameter estimates of the lower level exercises. This is one way of accounting for ‘inflating WTP values from SP’. The ratio between the sum of the parameter estimates from the lower level exercises and the parameter estimate of a level that is the combination of the same levels at the package exercise is the factor that is used to scale up or down the parameter estimates from the lower level exercises.

The derivation of the WTP from factored coefficients is similar to the one from coefficients that are not factored. The WTP is estimated as:

a. When the cost is not taken as log cost

WTP is the ratio between the coefficient of the parameter under consideration and the coefficient of cost.

b. When the cost is taken as log cost

WTP is the average of the product of chosen cost at each observation and the ratio between coefficient of parameter under consideration and coefficient of cost.

It is easier for respondents to comprehend the continuous variables than the categorical variables as they sometimes either require lengthy explanation in order to make the respondents understand the exact meaning or they mean different things to different respondents. For example, an ‘as now’ situation for a parameter would be different for different respondents or parameters that are described to have levels as low, medium and high may be interpreted differently by different respondents. Though range of levels play a role in the parameter/WTP estimation, there exists no clear information on the exact boundary to fix the range of the levels. It is suggested to have the finite set of factors that influence the choice decision. If we ignore/fail to identify all such factors then the results are likely to be biased than not. However, in case of choice experiments we assume that all the factors that are not covered in the experiments stay same across the choice situations.

Within this study, weighting seem to have a negligible effect on the results. The WTP values have not changed before and after the weighting at the sub groups. There is, however, a negligible difference between the WTP estimates at the aggregate level. We have not estimated the CIs for the WTP values for the unweighted data. Given that the t-stats/standard errors are different (better) in the weighted model, the confidence intervals at the aggregate level are also likely to be different.

The larger the number of respondents in any given groups or sub group the more likely they are to give better results in terms of statistical significance and this is evident from the SH-NFC group.

## Stated Preference Analysis (Log Cost): Overall Sample

The regression is a logit model based on the utility maximisation random utility theory. The analysis is based on a total of 33,901 observations.

A 't test' value of 1.96 or greater either means that respondents were significantly supportive of the proposition (ie a positive value) or significantly opposed to it (ie a negative value). For ease of comprehension those results that are insignificant are highlighted in yellow throughout this section. A 'co-efficient value' or utility illustrates the relative importance of each level indicated with respect to the lowest/base level. In the case of categorical and interval variables. In the case of continuous or interval variables it illustrates the relative importance of one added unit (minutes, percentage, points and bags).

The following table (Table 11) shows the factored coefficient scores given by all respondents to each attribute level tested. It also shows the t-stat for each level together with the derived willingness to pay (WTP).

It should be noted that the "base" or "lowest" level of each attribute has a utility score of zero against which all other levels are measured (and these base levels are not shown on the chart below).

Additionally, any attribute that shows an insignificant result will not show a derived willingness to pay nor have associated confidence intervals. Derived willingness to pay may be insignificant even if the coefficient associated with the variable has significant impact on utility because its standard errors also include the uncertainty around the coefficient associated with the cost variable.

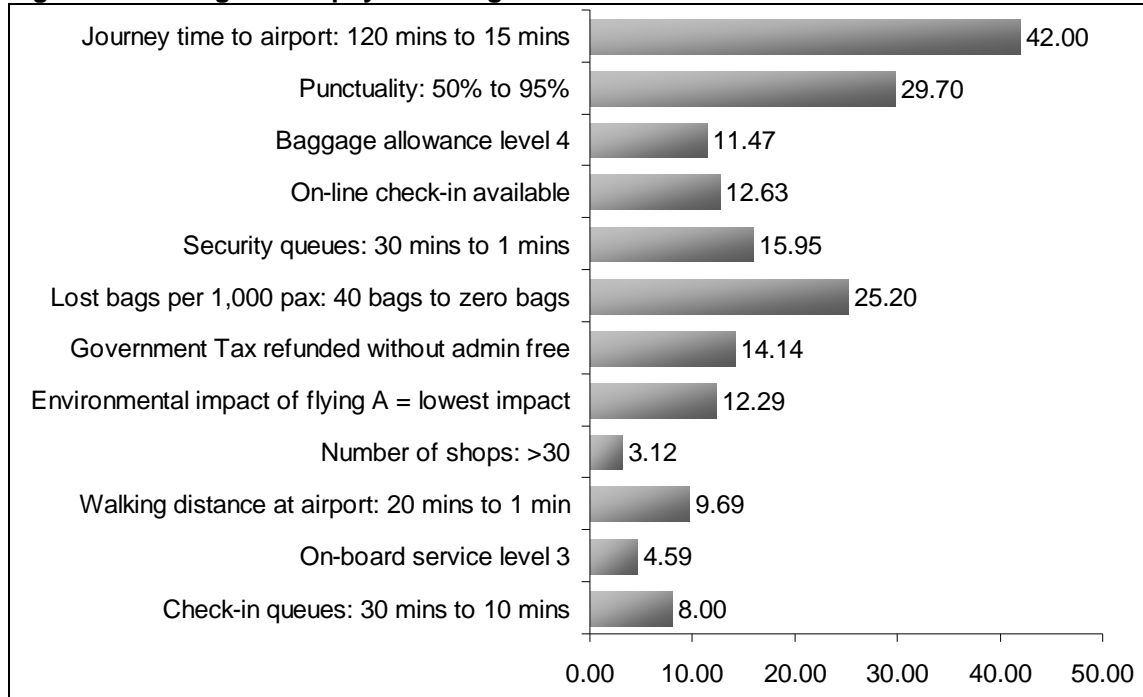
The stated preference analysis has been undertaken using absolute cost and log cost. The results shown by quota group in the remainder of this section are based on log cost. The model results shown using absolute are shown in Appendix A.

**Table 11: Overall Sample Analysis Using Log Cost:**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-6.36	-22.17	£293.74		
Journey time to airport (min)	-0.0086	-22.15	0.40	0.34	0.45
Airline on time performance (percentage points)	0.0144	19.48	0.66	0.55	0.78
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	0.0568	0.89	-	-	-
Baggage allowance level 3	0.1226	2.11	5.66	-2.67	13.99
Baggage allowance level 4	0.2483	7.23	11.47	6.60	16.34
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.2735	11.53	12.63	9.49	15.77
Security queuing times (min)	-0.0118	-12.79	0.55	0.42	0.67
Lost bags per 1,000 pax	-0.0136	-11.00	0.63	0.45	0.81
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.3413	10.81	15.76	11.23	20.30
Government Tax refunded upon self cancellation without admin fee	0.3062	13.39	14.14	11.08	17.21
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	0.0713	2.06	3.29	-2.22	8.81
Environmental Impact of Flying E	0.2049	5.54	9.46	3.70	15.23
Environmental Impact of Flying D	0.1675	4.70	7.74	2.14	13.33
Environmental Impact of Flying C	0.2581	6.86	11.92	6.14	17.70
Environmental Impact of Flying B	0.2683	6.93	12.39	6.45	18.33
Environmental Impact of Flying A = lowest impact	0.2660	7.19	12.29	6.63	17.95
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.1090	4.32	5.03	-0.64	10.70
Number of shops (>30)	0.0676	5.23	3.12	0.23	6.01
Walking distance at airport (min)	-0.0111	-11.72	0.51	0.32	0.71
On-board service level 1	Base	-	-	-	-
On-board service level 2	-0.0078	-0.39	-	-	-
On-board service level 3	0.0994	6.72	4.59	1.32	7.86
Check-in queues (min)	-0.0087	-15.87	0.40	0.30	0.51

The following chart shows how willingness to pay can be presented when the continuous variables are shown as the difference between the lowest level tested and the highest rather than per unit (ie: per minute, per percentage point etc). For ease of presentation the chart shows the “highest” level of each attribute tested.

**Figure 18: Willingness to pay at the highest level of each attribute tested**



## Stated Preference Analysis (Log Cost): Domestic Full Service Business/Premium Economy

The analysis using log cost for domestic business/premium economy respondents is based on 69 unweighted respondents (7 weighted cases) and 1,033 observations. Hence the sample size is too small to derive any significant results.

**Table 12: Log Cost: Domestic Full Service Business/Premium Economy**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP Confidence Interval 95%	
				Low	High
Log (ticket cost [£])	-0.43	-0.35	£299.00		
Journey time to airport (min)	-0.0003	-1.62	-	-	-
Airline on time performance (percentage points)	0.0021	4.53	-	-	-
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	-0.0151	-0.41	-	-	-
Baggage allowance level 3	0.0081	0.24	-	-	-
Baggage allowance level 4	-0.0229	-1.08	-	-	-
On-line check-in not available	Base		-		
On-line check-in available	0.0242	1.64	-	-	-
Security queuing times (min)	-0.0008	-0.34	-	-	-
Lost bags per 1,000 pax	-0.0007	-0.34	-	-	-
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.0252	0.34	-	-	-
Government Tax refunded upon self cancellation without admin fee	0.0075	0.33	-	-	-
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	-0.0245	-0.34	-	-	-
Environmental Impact of Flying E	0.0033	0.2	-	-	-
Environmental Impact of Flying D	0.0020	0.12	-	-	-
Environmental Impact of Flying C	0.0001	0	-	-	-
Environmental Impact of Flying B	0.0037	0.21	-	-	-
Environmental Impact of Flying A = lowest impact	0.0129	0.32	-	-	-
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.0332	0.33	-	-	-
Number of shops (>30)	0.0003	0.02	-	-	-
Walking distance at airport (min)	-0.0003	-0.23	-	-	-
On-board service level 1	Base	-	-	-	-
On-board service level 2	0.0214	0.31	-	-	-
On-board service level 3	-0.0168	-0.33	-	-	-
Check-in queues (min)	-0.0015	-0.34	-	-	-



## Stated Preference Analysis (Log Cost): Domestic Full Service Economy

Table 13 shows the analysis using log cost for domestic full service economy respondents. This analysis is based on 134 unweighted respondents (121 weighted cases) and 2,064 observations.

**Table 13: Log cost: Domestic Full Service Economy**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-3.65	-3.61	£119.82		
Journey time to airport (min)	-0.0095	-7.25	0.31	0.13	0.50
Airline on time performance (percentage points)	0.0143	5.66	0.47	0.12	0.82
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	-0.3341	-1.67	-	-	-
Baggage allowance level 3	-0.2235	-1.21	-	-	-
Baggage allowance level 4	0.2141	1.93	-	-	-
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.2522	3.26	8.28	0.01	16.55
Security queuing times (min)	-0.0188	-3.12	0.62	0.33	0.91
Lost bags per 1,000 pax	-0.0052	-1.6	-	-	-
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.3148	2.52	10.34	2.30	18.38
Government Tax refunded upon self cancellation without admin fee	0.2846	3.01	9.34	4.44	14.25
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	0.0027	0.03	-	-	-
Environmental Impact of Flying E	0.1681	1.65	-	-	-
Environmental Impact of Flying D	0.2175	1.83	-	-	-
Environmental Impact of Flying C	0.3451	2.3	11.33	1.00	21.66
Environmental Impact of Flying B	0.1342	1.31	-	-	-
Environmental Impact of Flying A = lowest impact	0.1077	1.16	-	-	-
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.0892	1.23	-	-	-
Number of shops (>30)	0.1023	2.13	3.36	-3.55	10.26
Walking distance at airport (min)	-0.0051	-2.1	0.17	-0.18	0.52
On-board service level 1	Base	-	-	-	-
On-board service level 2	0.0095	0.16	-	-	-
On-board service level 3	0.0062	0.14	-	-	-
Check-in queues (min)	-0.0107	-3.03	0.35	0.08	0.78

## Stated Preference Analysis (Log Cost): Domestic NFC/Charter

Table 14 shows the analysis using log cost for domestic NFC/charter respondents. This analysis is based on 286 unweighted respondents (189 weighted cases) and 24,298 observations.

**Table 14: Log cost: Domestic NFC/Charter**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-5.42	-7.76	£79.48		
Journey time to airport (min)	-0.0142	-10.7	0.21	0.15	0.27
Airline on time performance (percentage points)	0.0206	7.55	0.30	0.19	0.41
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	-0.1538	-0.75	-	-	-
Baggage allowance level 3	-0.1206	-0.64	-	-	-
Baggage allowance level 4	0.1004	0.91	-	-	-
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.4436	5.62	6.50	3.65	9.36
Security queuing times (min)	-0.0165	-4.96	0.24	0.13	0.35
Lost bags per 1,000 pax	-0.0173	-4.31	0.25	0.11	0.40
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.3787	3.91	5.55	1.94	9.16
Government Tax refunded upon self cancellation without admin fee	0.2649	4.13	3.88	1.53	6.23
Environmental Impact of Flying G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	0.1565	1.41	-	-	-
Environmental Impact of Flying E	0.229	2.19	3.36	-0.92	7.63
Environmental Impact of Flying D	0.1775	1.72	-	--	-
Environmental Impact of Flying C	0.25	2.18	3.67	-1.02	8.36
Environmental Impact of Flying B	0.336	2.91	4.93	0.35	9.51
Environmental Impact of Flying and A = lowest impact	0.1937	1.88	-	-	-
Number of shops (<10)	-	-	-	-	-
Number of shops (10-30)	0.2962	3.09	4.34	-1.28	9.97
Number of shops (>30)	0.0867	2.08	2.76	0.25	5.26
Walking distance at airport (min)	-0.0128	-4	0.19	0.01	0.37
On-board service level 1	Base	-	-	-	-
On-board service level 2	-0.0466	-0.72	-	-	-
On-board service level 3	0.0517	1.11	-	-	-
Check-in queues (min)	-0.0115	-5.44	0.17	0.06	0.28

## Stated Preference Analysis (Log Cost): Short/Mid Haul Full Service Business/Premium Economy

Table 15 shows the analysis using log cost for short/mid haul full service business/premium economy respondents. This analysis is based on 229 unweighted respondents (25 weighted cases) and 3,441 observations.

**Table 15: Log Cost: Short/Mid Haul Full Service Business/Premium Economy**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-3.18	-4.6	£594.78		
Journey time to airport (min)	-0.0048	-2.13	0.90	0.32	1.49
Airline on time performance (percentage points)	0.0204	3.79	3.82	1.92	5.71
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	0.4767	1.09	-	-	-
Baggage allowance level 3	0.2315	0.55	-	-	-
Baggage allowance level 4	-0.0027	-0.01	-	-	-
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.2079	1.32	-	-	-
Security queuing times (min)	-0.0074	-1.12	-	-	-
Lost bags per 1,000 pax	-0.0222	-1.89	-	-	-
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.7969	2.07	149.06	14.82	283.29
Government Tax refunded upon self cancellation without admin fee	0.4750	2.06	88.84	8.28	169.40
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	-0.1690	-0.58	-	-	-
Environmental Impact of Flying E	0.6045	1.6	-	-	-
Environmental Impact of Flying C	0.6411	1.71	-	-	-
Environmental Impact of Flying D	0.7688	1.85	-	-	-
Environmental Impact of Flying B	0.7988	1.84	-	-	-
Environmental Impact of Flying A = lowest impact	0.8298	1.96	155.20	5.59	304.81
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.0325	0.25	-	-	-
Number of shops (>30)	0.1747	1.94	-	-	-
Walking distance at airport (min)	-0.0120	-2.02	2.24	-0.15	4.63
On-board service level 1	Base	-	-	-	-
On-board service level 2	0.1288	1.01	-	-	-
On-board service level 3	0.1755	1.94	-	-	-
Check-in queues (min)	-0.0098	-2.9	1.84	0.65	3.03

## Stated Preference Analysis (Log Cost): Short/Mid Haul Full Service Economy

Table 16 shows the analysis using log cost for short/mid haul full service economy respondents. This analysis is based on 395 unweighted respondents (368 weighted cases) and 6,036 observations.

**Table 16: Log Cost: Short/Mid Haul Full Service Economy**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-6.75	-11.43	£177.62		
Journey time to airport (min)	-0.0098	-11.05	0.26	0.19	0.33
Airline on time performance (percentage points)	0.0187	10.54	0.49	0.35	0.63
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	-0.1320	-0.88	-	-	-
Baggage allowance level 3	-0.0017	-0.01	-	-	-
Baggage allowance level 4	0.1505	1.89	-	-	-
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.2699	4.81	7.10	3.36	10.85
Security queuing times (min)	-0.0135	-7.07	0.35	0.17	0.54
Lost bags per 1,000 pax	-0.0122	-5.36	0.32	0.08	0.56
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.3136	5.04	8.25	1.70	14.80
Government Tax refunded upon self cancellation without admin fee	0.2936	6.7	7.73	3.40	12.05
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	0.0637	0.98	-	-	-
Environmental Impact of Flying E	0.2185	3.05	5.75	-2.16	13.66
Environmental Impact of Flying D	0.1529	2.13	4.02	-4.01	12.06
Environmental Impact of Flying C	0.2467	3.44	6.49	-1.37	14.36
Environmental Impact of Flying B	0.2381	3.02	6.26	-2.44	14.97
Environmental Impact of Flying A = lowest impact	0.3091	4.13	8.13	0.05	16.21
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.0813	1.37	-	-	-
Number of shops (>30)	0.1121	3.34	2.95	-0.53	6.43
Walking distance at airport (min)	-0.0116	-5.3	0.31	0.09	0.52
On-board service level 1	Base	-	-	-	-
On-board service level 2	-0.0837	-1.61	-	-	-
On-board service level 3	0.0539	1.54	-	-	-
Check-in queues (min)	-0.0108	-8.11	0.28	0.17	0.40

## Stated Preference Analysis (Log Cost): Short/Mid Haul NFC/ Charter

Table 17 shows the analysis using log cost for short/mid haul NFC/charter respondents. This analysis is based on 539 unweighted respondents (975 weighted cases) and 8,318 observations.

**Table 17: Log Cost: Short/Mid Haul NFC/Charter**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-5.13	-9.94	£107.77		
Journey time to airport (min)	-0.0085	-12.49	0.18	0.13	0.23
Airline on time performance (percentage points)	0.0141	11.05	0.30	0.20	0.39
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	0.2736	2.44	5.75	-2.22	13.72
Baggage allowance level 3	0.2391	2.35	5.02	-2.15	12.20
Baggage allowance level 4	0.2835	4.61	5.96	1.73	10.18
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.2613	6.37	5.49	2.92	8.06
Security queuing times (min)	-0.0098	-6.53	0.21	0.12	0.29
Lost bags per 1,000 pax	-0.0140	-6.4	0.29	0.17	0.41
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.3014	5.89	6.33	3.40	9.26
Government Tax refunded upon self cancellation without admin fee	0.2857	7.11	6.00	3.93	8.07
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	0.1218	2.27	2.56	-1.02	6.14
Environmental Impact of Flying E	0.2646	4.24	5.56	1.64	9.48
Environmental Impact of Flying D	0.1718	3.1	3.61	-0.02	7.24
Environmental Impact of Flying C	0.2959	4.65	6.22	2.29	10.14
Environmental Impact of Flying B	0.2965	4.57	6.23	2.21	10.25
Environmental Impact of Flying A = lowest impact	0.2899	4.66	6.09	2.25	9.93
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.0773	1.99	1.62	-2.4	5.65
Number of shops (>30)	0.0343	1.84	-	-	-
Walking distance at airport (min)	-0.0107	-6.54	0.22	0.08	0.37
On-board service level 1	Base	-	-	-	-
On-board service level 2	0.0214	0.73	-	-	-
On-board service level 3	0.0992	4.17	2.09	0.27	4.44
Check-in queues (min)	-0.0082	-7.94	0.17	0.09	0.26

## Stated Preference Analysis (Log Cost): Long Haul Full Service Business/Premium Economy

Table 18 shows the analysis using log cost for long haul full service business/premium economy respondents. This analysis is based on 116 unweighted respondents (52 weighted cases) and 1,703 observations.

**Table 18: Log Cost: Long Haul Full Service Business/Premium Economy**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-8.17	-7.3	£1,189.22		
Journey time to airport (min)	-0.0091	-4.14	1.32	0.67	1.98
Airline on time performance (percentage points)	0.0145	2.86	2.12	0.72	3.51
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	0.1010	0.25	-	-	-
Baggage allowance level 3	0.0212	0.05	-	-	-
Baggage allowance level 4	0.0816	0.36	-	-	-
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.6088	3.88	88.62	47.29	129.96
Security queuing times (min)	-0.0222	-2.23	3.24	-0.07	6.55
Lost bags per 1,000 pax	-0.0278	-2.11	4.05	-0.34	8.45
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	1.1739	2.90	170.87	41.45	300.30
Government Tax refunded upon self cancellation without admin fee	1.1000	3.45	160.12	61.97	258.27
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	0.3440	0.88	-	-	-
Environmental Impact of Flying E	0.4523	1.06	-	-	-
Environmental Impact of Flying D	0.8291	1.77	-	-	-
Environmental Impact of Flying C	-0.0533	-0.14	-	-	-
Environmental Impact of Flying B	0.1281	0.31	-	-	-
Environmental Impact of Flying A = lowest impact	0.4860	1.16	-	-	-
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.0629	0.70	-	-	-
Number of shops (>30)	0.1090	1.54	-	-	-
Walking distance at airport (min)	-0.0087	-1.92	-	-	-
On-board service level 1	Base	-	-	-	-
On-board service level 2	0.1595	1.35	-	-	-
On-board service level 3	0.1940	2.06	28.23	-156.74	213.20
Check-in queues (min)	-0.0090	-2.48	1.32	-5.81	8.44

## Stated Preference Analysis (Log Cost): Long Haul Full Service Economy

Table 19 shows the analysis using log cost for long haul full service economy respondents. This analysis is based on 458 unweighted respondents (489 weighted cases) and 7,017 observations.

**Table 19: Log Cost: Long Haul Full Service Economy**

Variable	Factored Coefficient	t-stat	Derived WTP	WPT 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-9.94	-16.54	£430.74		
Journey time to airport (min)	-0.0051	-10.51	0.22	0.12	0.32
Airline on time performance (percentage points)	0.0086	9.49	0.37	0.18	0.56
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	-0.0841	-1.10	-	-	-
Baggage allowance level 3	0.0809	1.12	-	-	-
Baggage allowance level 4	0.2319	5.37	10.05	1.20	18.90
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.2062	7.21	8.94	3.26	14.61
Security queuing times (min)	-0.0113	-5.59	0.49	0.22	0.76
Lost bags per 1,000 pax	-0.0151	-5.41	0.66	0.28	1.03
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.4327	5.73	18.75	8.66	28.84
Government Tax refunded upon self cancellation without admin fee	0.3773	7.30	16.35	9.69	23.01
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	-0.0413	-0.47	-	-	-
Environmental Impact of Flying E	0.0301	0.32	-	-	-
Environmental Impact of Flying D	0.1362	1.51	-	-	-
Environmental Impact of Flying C	0.1459	1.62	-	-	-
Environmental Impact of Flying B	0.2839	3.09	12.30	-0.45	25.06
Environmental Impact of Flying A = lowest impact	0.2320	2.55	10.06	-2.64	22.75
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.1581	2.42	6.85	-7.62	21.32
Number of shops (>30)	0.0998	3.29	4.32	-2.36	11.01
Walking distance at airport (min)	-0.0122	-6.40	0.53	0.12	0.93
On-board service level 1	Base	-	-	-	-
On-board service level 2	-0.0273	-0.59	-	-	-
On-board service level 3	0.1733	5.34	7.51	0.51	14.51
Check-in queues (min)	-0.0064	-6.98	0.28	0.08	0.47

## Stated Preference Analysis (Log Cost): Access to Environmental Impact – Unimportant

In addition to the stated preference analysis undertaken by flight length, airline type and cabin analysis was also undertaken by attitude to having access to information about the environmental impact of the flight booked.

Table 20 shows the analysis using log cost for those respondents who stated that it was not important to have access to the environmental impact of the flight they are booking. This analysis is based on 623 unweighted respondents (677 weighted cases) and 9,561 observations.

**Table 20: Log Cost: Access to Environmental Impact – Unimportant**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-7.6	-13.07	£255.02		
Journey time to airport (min)	-0.0110	-12.65	0.37	0.29	0.45
Airline on time performance (percentage points)	0.0170	11.21	0.57	0.41	0.73
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	0.1354	1.10	-	-	-
Baggage allowance level 3	0.2053	1.87	-	-	-
Baggage allowance level 4	0.3949	5.99	13.25	6.32	20.18
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.2658	5.74	8.92	4.36	13.48
Security queuing times (min)	-0.0109	-8.33	0.37	0.20	0.54
Lost bags per 1,000 pax	-0.0120	-7.21	0.40	0.18	0.63
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.2435	5.95	8.17	2.37	13.97
Government Tax refunded upon self cancellation without admin fee	0.2224	7.76	7.46	3.64	11.29
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	0.1110	2.41	3.72	-3.24	10.68
Environmental Impact of Flying E	0.1531	3.22	5.14	-1.98	12.26
Environmental Impact of Flying D	0.0308	0.71	-	-	-
Environmental Impact of Flying C	0.1226	2.51	4.11	-3.26	11.49
Environmental Impact of Flying B	0.1144	2.45	3.84	-3.22	10.90
Environmental Impact of Flying A = lowest impact	0.1226	2.74	4.11	-2.62	10.85
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.0938	1.75	-	-	-
Number of shops (>30)	0.0920	3.14	3.09	-1.04	7.21
Walking distance at airport (min)	-0.0152	-6.94	0.51	0.23	0.79
On-board service level 1	Base	-	-	-	-
On-board service level 2	0.0184	0.41	-	-	-
On-board service level 3	0.1483	4.24	4.98	0.14	9.81
Check-in queues (min)	-0.0122	-9.57	0.41	0.27	0.55



## Stated Preference Analysis (Log Cost): Access to Environmental Impact – Important

Table 21 shows the analysis using log cost for those respondents who stated that it was important to have access to the environmental impact of the flight they are booking. This analysis is based on 946 unweighted respondents (860 weighted cases) and 14,377 observations.

**Table 21: Log Cost: Access to Environmental Impact – Important**

Variable	Factored Coefficient	t-stat	Derived WTP	WTP 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-5.29	-12.22	£329.19		
Journey time to airport (min)	-0.0059	-12.14	0.37	0.26	0.48
Airline on time performance (percentage points)	0.0119	11.63	0.74	0.50	0.97
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	-0.0019	-0.02	-	-	-
Baggage allowance level 3	0.0245	0.30	-	-	-
Baggage allowance level 4	0.1733	3.68	10.79	1.03	20.54
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.2398	7.58	14.92	8.57	21.27
Security queuing times (min)	-0.0097	-5.92	0.60	0.33	0.88
Lost bags per 1,000 pax	-0.0148	-5.98	0.92	0.51	1.33
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.3646	5.85	22.69	12.34	33.05
Government Tax refunded upon self cancellation without admin fee	0.3279	7.13	20.41	13.25	27.56
Environmental Impact of Flying and G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	0.0866	1.28	-	-	-
Environmental Impact of Flying E	0.3686	4.75	22.94	9.50	36.37
Environmental Impact of Flying D	0.3279	4.41	20.41	7.39	33.42
Environmental Impact of Flying C	0.4433	5.45	27.59	13.85	41.33
Environmental Impact of Flying B	0.4997	5.79	31.10	16.72	45.47
Environmental Impact of Flying A = lowest impact	0.4545	5.53	28.28	14.45	42.11
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.1026	3.92	6.39	-5.30	18.08
Number of shops (>30)	0.0512	3.82	3.19	-2.80	9.18
Walking distance at airport (min)	-0.0062	-6.37	0.38	-0.03	0.80
On-board service level 1	Base	-	-	-	-
On-board service level 2	-0.0233	-1.17	-	-	-
On-board service level 3	0.0600	4.12	3.73	-2.75	10.22
Check-in queues (min)	-0.0044	-8.41	0.28	0.06	0.49

## Stated Preference Analysis (Log Cost): Access to Environmental Impact – Neutral

Table 22 shows the analysis using log cost for those respondents who were neutral to having access to the environmental impact of the flight they are booking. This analysis is based on 639 unweighted respondents (672 weighted cases) and 9,719 observations.

**Table 22: Log Cost: Access to Environmental Impact – Neutral**

Variable	Factored Coefficient	t-stat	Derived WTP	WPT 95% Confidence Interval	
				Low	High
Log (ticket cost [£])	-7.05	-12.94	£278.61		
Journey time to airport (min)	-0.0101	-12.72	0.40	0.31	0.49
Airline on time performance (percentage points)	0.0155	10.87	0.61	0.44	0.79
Baggage allowance level 1	Base	-	-	-	-
Baggage allowance level 2	0.0704	0.54	-	-	-
Baggage allowance level 3	0.1955	1.72	-	-	-
Baggage allowance level 4	0.2093	3.09	8.27	0.26	16.29
On-line check-in not available	Base	-	-	-	-
On-line check-in available	0.3271	6.81	12.93	7.78	18.08
Security queuing times (min)	-0.0117	-7.85	0.46	0.25	0.68
Lost bags per 1,000 pax	-0.0118	-6.18	0.47	0.18	0.76
No Government Tax refund upon self cancellation	Base	-	-	-	-
Government Tax refunded upon self cancellation with admin fee	0.3320	6.52	13.12	5.46	20.79
Government Tax refunded upon self cancellation without admin fee	0.2999	8.21	11.85	6.72	16.98
Environmental Impact of Flying G = highest impact	Base	-	-	-	-
Environmental Impact of Flying F	-0.0174	-0.33	-	-	-
Environmental Impact of Flying E	0.0429	0.73	-	-	-
Environmental Impact of Flying D	0.1392	2.37	5.50	-4.15	15.16
Environmental Impact of Flying C	0.1593	2.95	6.29	-2.52	15.11
Environmental Impact of Flying B	0.1481	2.5	5.85	-3.87	15.57
Environmental Impact of Flying and A = lowest impact	0.2049	3.52	8.10	-1.33	17.52
Number of shops (<10)	Base	-	-	-	-
Number of shops (10-30)	0.0445	0.84	-	-	-
Number of shops (>30)	0.0355	1.40	-	-	-
Walking distance at airport (min)	-0.0138	-7.35	0.55	0.26	0.84
On-board service level 1	Base	-	-	-	-
On-board service level 2	0.0122	0.30	-	-	-
On-board service level 3	0.1126	3.53	4.45	-0.95	9.86
Check-in queues (min)	-0.0120	-9.74	0.47	0.31	0.64

### 3.4 Passenger Information

#### Overview

Based on our survey the availability of information on the environmental impact of the flight is secondary to respondents’ strong desire for information on the contingencies in place to counter any problems relating to their ability to seamlessly carry out of their travel arrangements. Thus the key information requirement for respondents relate to how the airline will look after them if their flight is delayed/cancelled and the airline’s policy on compensation for lost bags. Respondents expressed a strong preference to be made aware of this provision at the time of booking their flight.

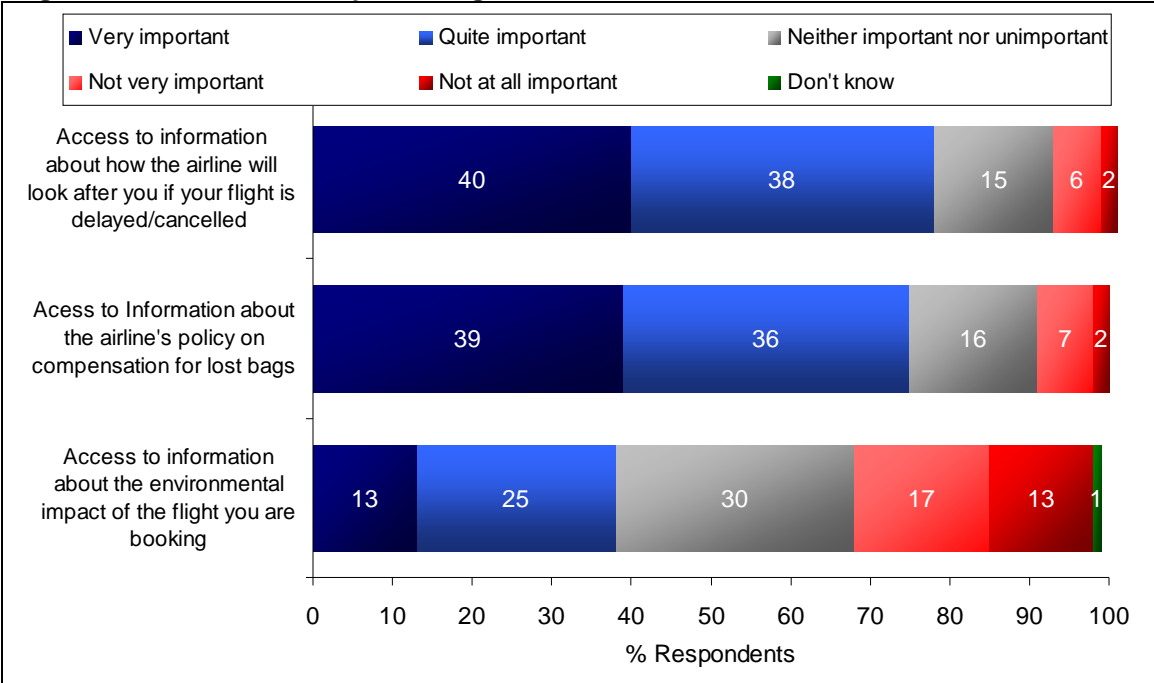
#### Main findings

##### 3.4.1 Importance of Access to Information

Respondents were more likely to consider having access to information about how the airline will look after them if their flight is delayed/cancelled and information about the airline’s policy on compensation for lost bags as very important or quite important than access to information about the environmental impact of their flight.

Respondents were asked to rate the importance of having access to different types of information. This is summarised in Figure 19.

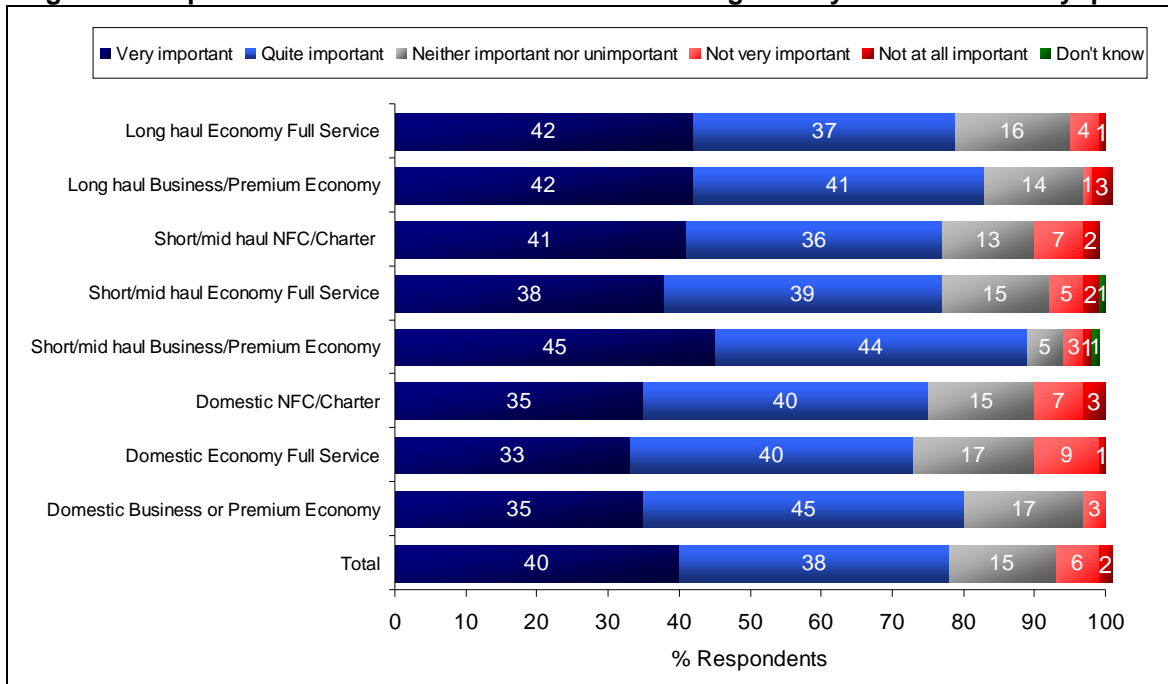
**Figure 19: Importance of access to information about flight delays/cancellations, lost bags and environmental impact of flight**



Base: All respondents (2,226)

Figure 20 summarises the results by flight length, cabin and airline.

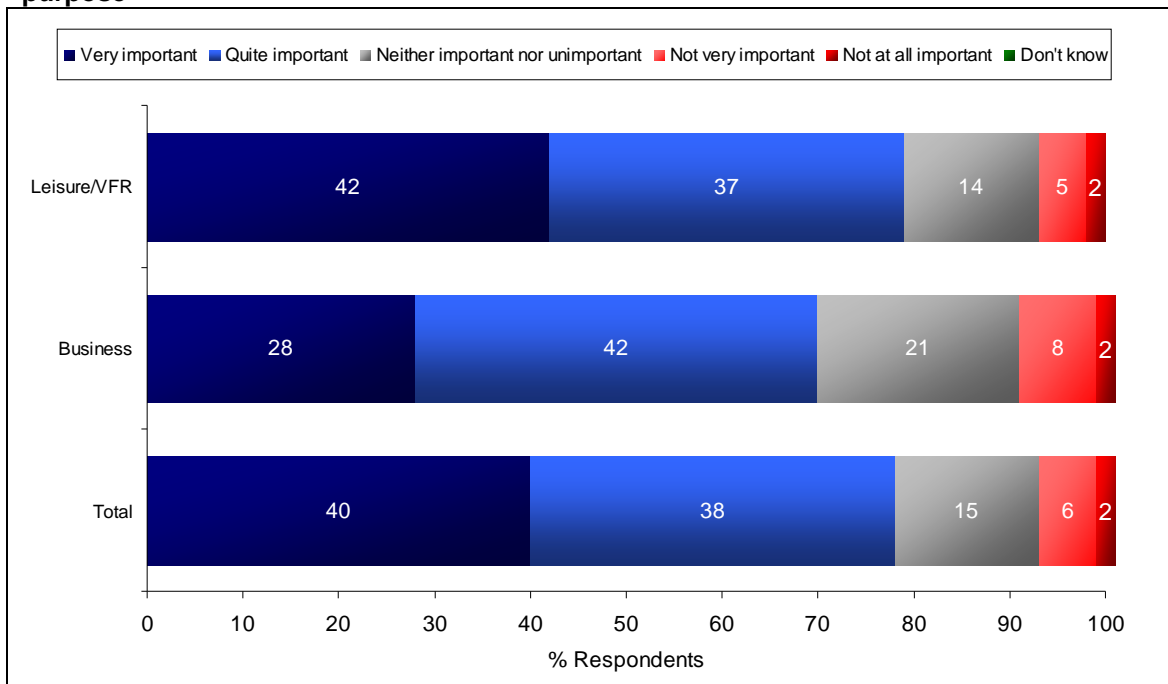
**Figure 20: Importance of access to information about flight delays/cancellations by quota**



Base: All respondents (2,226); Long haul economy full service (489), Long haul business/Premium Economy (52), short/mid haul NFC/Charter (975); Short/mid haul Economy full service (368); Short/mid haul Business/Premium Economy (25); Domestic NFC/Charter (189); domestic economy full service (121); Domestic Business or Premium Economy (7).

Figure 21 shows the results by journey purpose.

**Figure 21: Importance of access to information about flight delays/cancellations by trip purpose**

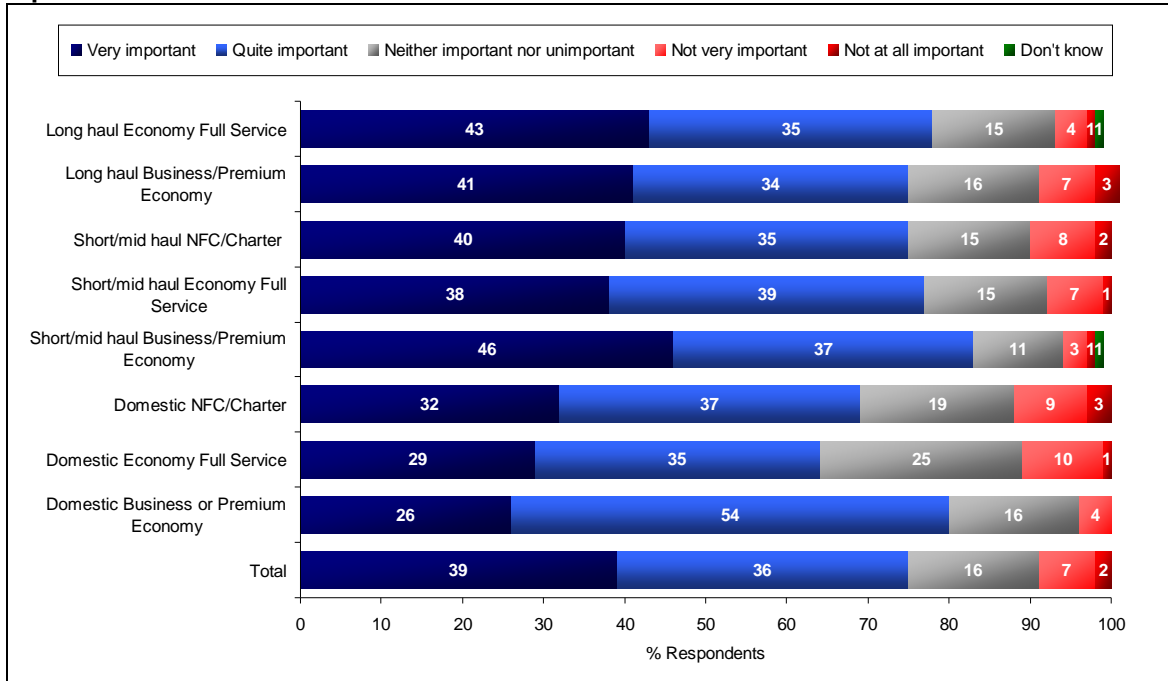


Base: All respondents (2,226); leisure/VFR (1,902); business (324)

There were no significant differences in the importance of access to information about how the airline will look after them in the event that their flight is delayed or cancelled by booking channel.

Figure 22 shows the importance of having access to information about compensation for lost bags by flight length, cabin and airline.

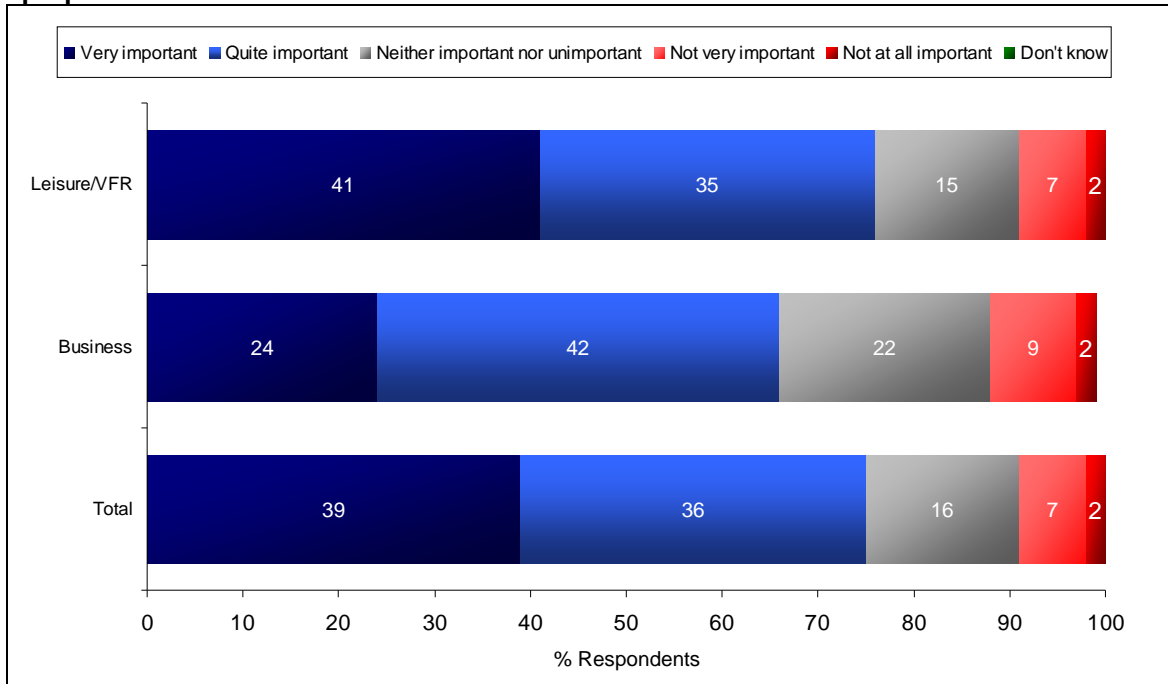
**Figure 22: Importance of access to information about compensation for lost bags by quota**



Base: All respondents (2,226); Long haul economy full service (489), Long haul business/Premium Economy (52), short/mid haul NFC/Charter (975); Short/mid haul Economy full service (368); Short/mid haul Business/Premium Economy (25); Domestic NFC/Charter (189); domestic economy full service (121); Domestic Business or Premium Economy (7).

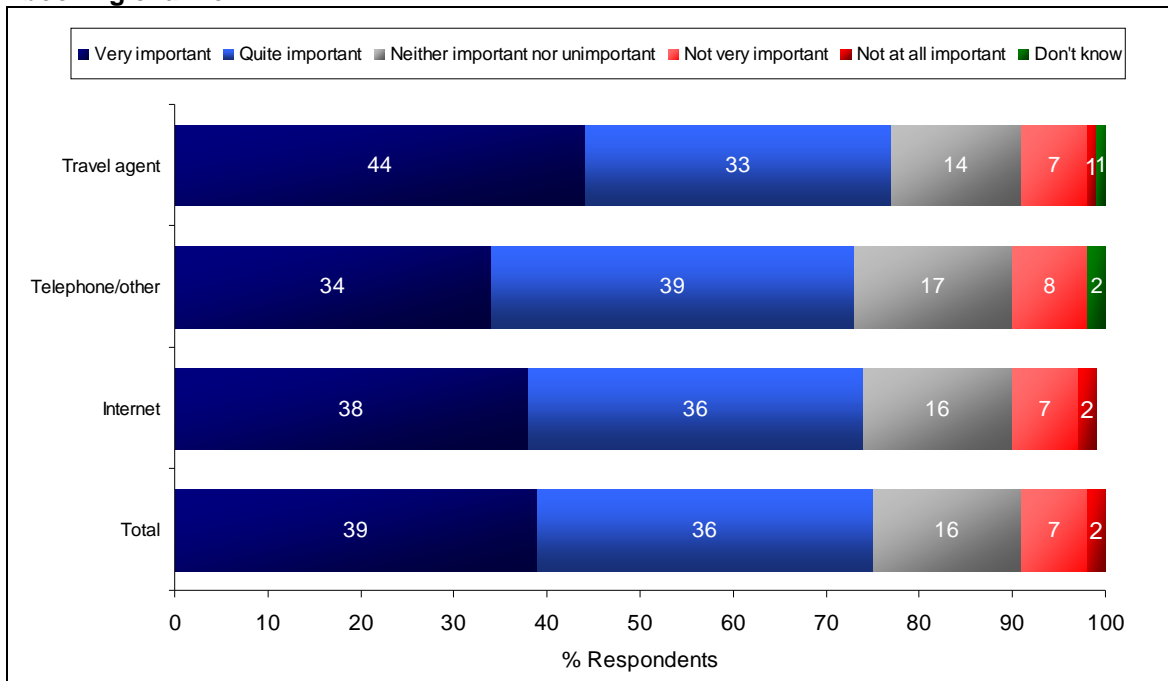
Figure 23 show the results by purpose whilst Figure 24 shows the results by booking channel.

**Figure 23: Importance of access to information about compensation for lost bags by trip purpose**



Base: All respondents (2,225); leisure/VFR (1,901); business (324)

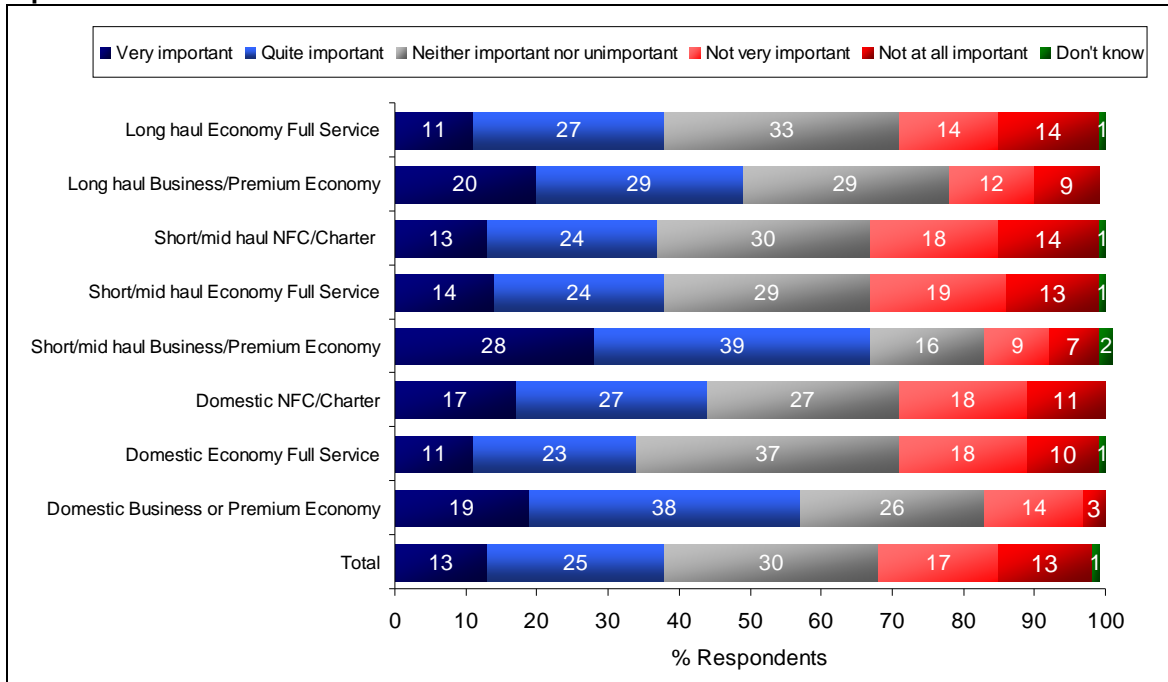
**Figure 24: Importance of access to information about compensation for lost bags by booking channel**



Base: All respondents (2,225); Internet (1,432); telephone/other (328); travel agent (465)

There were considerable differences in the share of respondents who consider access to information about the environmental impact of flight important by quota, as shown in Figure 25.

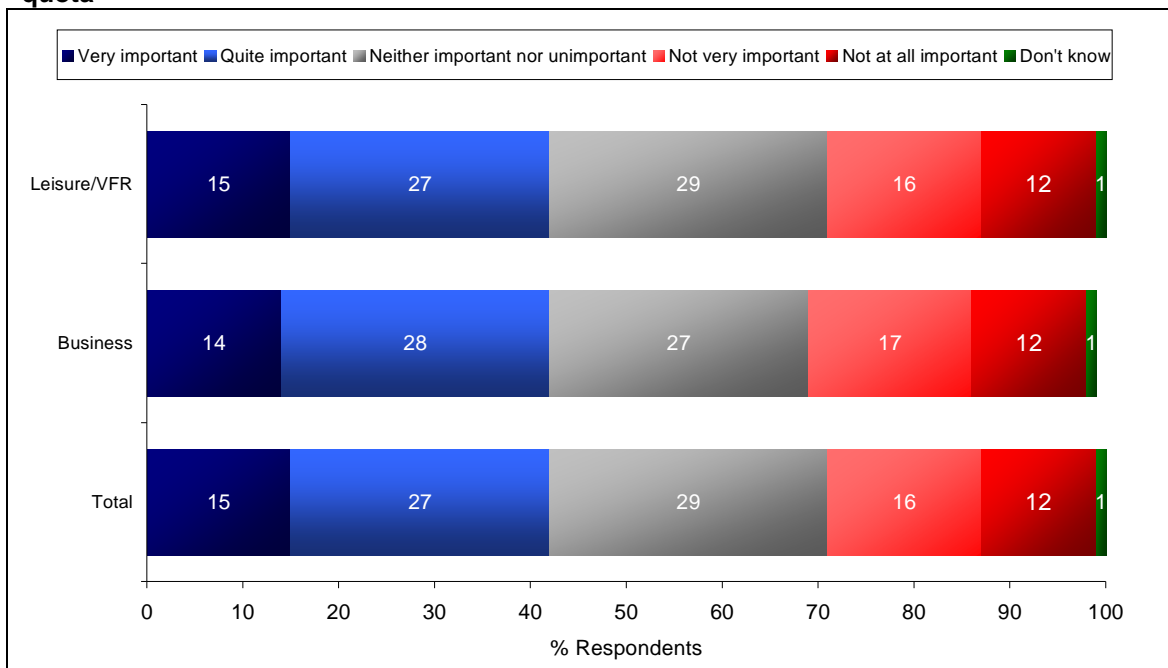
**Figure 25: Importance of access to information about environmental impact of flight by quota**



Base: All respondents (2,226); Long haul economy full service (489), Long haul business/Premium Economy (52), short/mid haul NFC/Charter (975); Short/mid haul Economy full service (368); Short/mid haul Business/Premium Economy (25); Domestic NFC/Charter (189); domestic economy full service (121); Domestic Business or Premium Economy (7).

Importance of access to information about the environmental impact of the flight taken by trip purpose is shown in Figure 26.

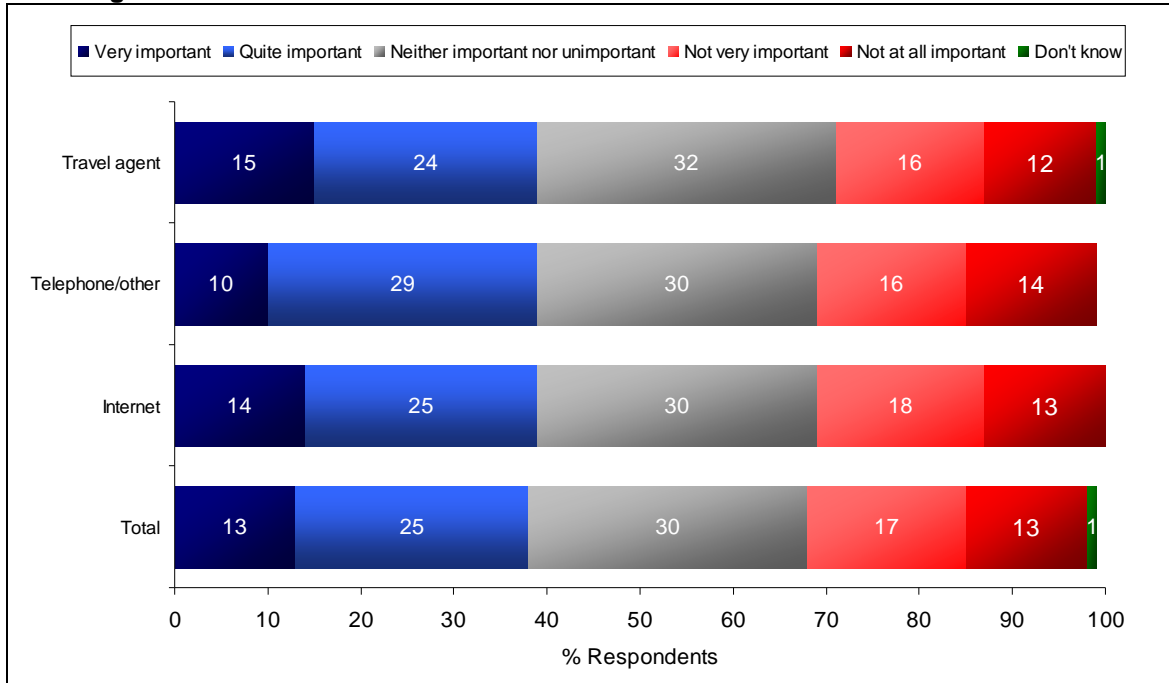
**Figure 26: Importance of access to information about environmental impact of flight by quota**



Base: All respondents (2,226); leisure/VFR (1902); business (324)

Figure 27 shows the results by booking channel.

**Figure 27: Importance of access to information about environmental impact of flight by booking channel**

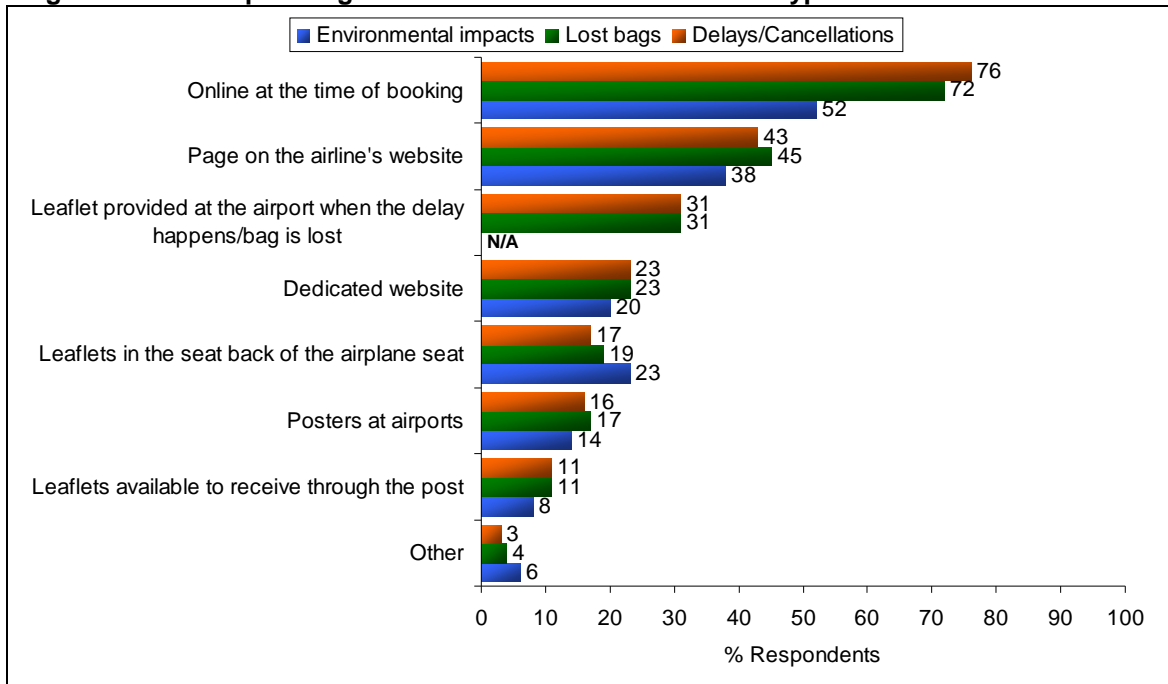


Base: All respondents (2,226); Internet (1,433); telephone/other (328); travel agent (465)



Respondents were most likely to prefer to access information delays/cancellations, lost bags and environmental impacts online at the time of booking their flight (76%, 72% and 52% respectively). This is summarised in **Figure 28**.

**Figure 28: Where passengers would like access to different types of information**



Base: All respondents (2,226)

Results by quota group is summarised in Table 23, by trip purpose in summarised in Table 24 and by booking channel in Table 25.

**Table 23: Where passengers would like access to information about delays/cancellations by quota**

	Total %	Domestic Business or Premium Economy %	Domestic Economy Full Service %	Domestic NFC/Charter %	Short/ mid haul Business/Premium Economy %	Short/ mid haul Economy Full Service %	Short/ mid haul NFC/Charter %	Long haul Business/Premium Economy %	Long haul Economy Full Service %
Online at the time of booking	76	52	77	73	63	77	76	68	78
Leaflets in the seat back of the aeroplane seat	17	32	19	20	30	20	15	28	16
Posters at airports	16	35	16	21	28	19	14	19	16
Dedicated website	23	38	19	23	34	25	20	29	29
Page on the airline's website	43	32	50	42	31	49	40	41	46
Leaflets available to receive through the post	11	12	3	7	15	13	11	13	13
Online at the time of booking	76	52	77	73	63	77	76	68	78
Posters at airports	16	35	16	21	28	19	14	19	16
<b>Base</b>	<b>2,226</b>	<b>7</b>	<b>121</b>	<b>189</b>	<b>25</b>	<b>368</b>	<b>975</b>	<b>52</b>	<b>489</b>

**Table 24: Where passengers would like access to information about delays/cancellations by trip purpose**

	Total %	Business %	Leisure/VFR %
Online at the time of booking	76	77	76
Page on the airline's website	43	51	42
Leaflets provided at airport when delay happens	31	32	30
Dedicated website	23	22	24
Leaflets in the seat back of the aeroplane seat	17	19	17
Posters at airports	16	21	15
Leaflets available to receive through the post	11	5	12
Other	3	2	4
<b>Base</b>	<b>2,226</b>	<b>324</b>	<b>1,902</b>

**Table 25: Where passengers would like access to information about delays/cancellations by booking channel**

	Total %	Internet %	Telephone/ other %	Travel agent %
Online at the time of booking	76	79	73	69
Page on the airline's website	43	43	46	43
Leaflets provided at airport when delay happens	31	29	33	34
Dedicated website	23	23	22	26
Leaflets in the seat back of the aeroplane seat	17	17	17	19
Posters at airports	16	16	15	19
Leaflets available to receive through the post	11	9	15	15
Other	3	3	4	4
<b>Base</b>	<b>2,226</b>	<b>1,433</b>	<b>328</b>	<b>465</b>

Respondents in the domestic business or premium economy quota were the least likely to say they would like to find out about the airline's policy on compensation for lost bags online at the time of booking (49%). They were also less likely to prefer a page on the airline's website (35%), or leaflets provided at the airport when the delay happens (20%). Instead, these respondents were more likely to prefer information sources such as posters at airports (35%) and leaflets in the back of airplane seats (33%).

Those in the domestic economy full service quota were less likely to prefer a dedicated website (19%) and leaflets available to receive through the post (4%).

Respondents in the domestic NFC/charter quota were also less likely to prefer a page on the airline's website (39%).

Those in the short/mid haul economy full service quota were most likely to embrace all communication options with their preferred media being online at the time of booking (74%) and a page on the airlines website (52%). This is shown in Table 26.

**Table 26: Where passengers would like access to information about compensation for lost bags by quota**

	Total %	Domestic Business or Premium Economy %	Domestic Economy Full Service %	Domestic NFC/Charter %	Short/ mid haul Business/Premium Economy %	Short/ mid haul Economy Full Service %	Short/ mid haul NFC/Charter %	Long haul Business/Premium Economy %	Long haul Economy Full Service %
Online at the time of booking	72	49	69	70	56	74	73	60	72
Leaflets in the seat back of the airplane seat	19	33	26	21	29	26	15	25	19
Posters at airports	17	35	19	16	32	21	14	24	17
Dedicated website	23	30	19	22	34	27	18	28	27
Page on the airline's website	45	35	49	39	29	52	41	46	50
Leaflets available to receive through the post	11	13	4	7	15	12	11	14	13
Leaflet provided at airport if bag is lost	31	20	34	28	17	32	30	30	33
Other	4	1	3	4	1	2	6	5	3
<b>Base</b>	<b>2,226</b>	<b>7</b>	<b>121</b>	<b>189</b>	<b>25</b>	<b>368</b>	<b>975</b>	<b>52</b>	<b>489</b>

Those booking their last flight for leisure purposes or to visit friends/relatives were significantly more likely to prefer to access information about compensation for lost bags via leaflets through the post than those who had booked their last flight for business purposes (12% and 6% respectively), as shown in Table 27. Similarly those booking their last flight for business purposes were significantly more likely to prefer to access information about compensation for lost bags via a page on the airline's website than those who had booked their last flight for leisure purposes or to visit friends/relatives (51% and 44% respectively).

**Table 27: Where passengers would like access to information about compensation for lost bags by trip purpose**

	Total %	Business %	Leisure/VFR %
Online at the time of booking	72	70	72
Page on the airline's website	45	51	44
Leaflet provided at airport if bag is lost	31	34	30
Dedicated website	23	22	23
Leaflets in the seat back of the airplane seat	19	19	19
Posters at airports	17	19	16
Leaflets available to receive through the post	11	6	12
Other	4	3	5
<b>Base</b>	<b>2,226</b>	<b>324</b>	<b>1,902</b>

Again, unsurprisingly, respondents who had booked online were significantly more likely to prefer being able to access information compensation for lost bags online at the time of booking (75%) than those who booked through a travel agent (67%) or by telephone/other (66%). By comparison, those who had booked with a travel agent (17%) or by telephone/other (14%) were significantly more likely than those who had booked on the Internet (8%) to prefer being able to access this information through leaflets available to receive through the post. This is summarised in Table 28.

**Table 28: Where passengers would like access to information about compensation for lost bags by booking channel**

	Total %	Internet %	Telephone/other %	Travel agent %
Online at the time of booking	72	75	66	67
Page on the airline`s website	45	44	46	47
Leaflet provided at airport if bag is lost	31	30	32	35
Dedicated website	23	22	22	25
Leaflets in the seat back of the airplane seat	19	18	22	20
Posters at airports	17	15	14	24
Leaflets available to receive through the post	11	8	14	17
Other	4	4	6	5
<b>Base</b>	<b>2,226</b>	<b>1,433</b>	<b>328</b>	<b>465</b>

Respondents in the domestic business or premium economy quota were more likely to prefer sourcing information about the environmental impact of flight through sources such as leaflets in the back of airplane seats (32%) and posters at airports (30%). By comparison they were less likely to prefer a page on the airline`s website (26%) or online at the time of booking (52%), as shown in Table 29.

Those in the domestic economy full service quota were the least likely to prefer a dedicated website (11%) and leaflets available to receive through the post (3%), but were more likely to prefer a page on the airline`s website than other respondents (49%).

Those in the short/mid haul NFC/charter quota were less likely than other respondents to want to have access to information about the environmental impact of flight on leaflets in the back of airplane seats (19%) or on posters at airports (11%).

**Table 29: Where passengers would like access to information about environmental impact of flight by quota**

	Total %	Domestic Business or Premium Economy %	Domestic Economy Full Service %	Domestic NFC/Charter %	Short/ mid haul Business/ Premium Economy %	Short/ mid haul Economy Full Service %	Short/ mid haul NFC/ Charter %	Long haul Business/ Premium Economy %	Long haul Economy Full Service %
Online at the time of booking	52	45	47	55	49	54	52	49	53
Leaflets in the seat back of the airplane seat	23	32	26	27	31	26	19	28	23
Posters at airports	14	30	16	15	29	17	11	22	16
Dedicated website	20	23	11	20	22	22	19	31	22
Page on the airline's website	38	26	49	34	24	42	34	33	46
Leaflets available to receive through the post	8	6	3	5	7	9	9	10	9
Other	6		4	4	3	4	7	3	5
Online at the time of booking	52	45	47	55	49	54	52	49	53
Leaflets in the seat back of the airplane seat	23	32	26	27	31	26	19	28	23
<b>Base</b>	<b>2,226</b>	<b>7</b>	<b>121</b>	<b>189</b>	<b>25</b>	<b>368</b>	<b>975</b>	<b>52</b>	<b>489</b>

Table 30 illustrates that those booking their last flight for leisure purposes or to visit friends/relatives were significantly more likely to prefer to access information about the environmental impact of flight via leaflets through the post than those who had booked their last flight for business purposes (9% and 5% respectively). Those booking their last flight for business purposes were significantly more likely to prefer to access information about the environmental impact of flight via a page on the airline's website than those who had booked their last flight for leisure purposes or to visit friends/relatives (44% and 38% respectively).

**Table 30: Where passengers would like access to information about environmental impact of flight by trip purpose**

	Total %	Business %	Leisure/VFR %
Online at the time of booking	52	49	53
Page on the airline's website	38	44	38
Leaflets in the seat back of the airplane seat	23	24	22
Dedicated website	20	16	21
Posters at airports	14	14	14
Leaflets available to receive through the post	8	5	9
Other	6	5	6
<b>Base</b>	<b>2,226</b>	<b>324</b>	<b>1,902</b>

As expected, respondents who had booked their most recent flight on the Internet were significantly more likely to mention that they would prefer to access information about

the environmental impact of flight online at the time of booking (55%) than those who had booked by telephone/other (49%) or with a travel agent (47%).

Respondents who had booked the flight with a travel agent (17%) were significantly more likely than those who had booked online (12%) to prefer to receive this type of information on posters at airports. Respondents who booked their flight by telephone/other were significantly more likely than to wish to access this information through leaflets in the seat back of the airplane seat (28%) than those who booked by internet (22%) or travel agent (21%).

Finally, respondents who booked their most recent flight by telephone/other were significantly more likely to request information via a page on the airlines website (44%) than those who booked by internet (38%).

The above information is summarised in Table 31.

**Table 31: Where passengers would like access to information about environmental impact of flight by booking channel**

	Total %	Internet %	Telephone/other %	Travel agent %
Online at the time of booking	52	55	49	47
Page on the airline`s website	38	38	44	37
Leaflets in the seat back of the airplane seat	23	22	28	21
Dedicated website	20	19	19	24
Posters at airports	14	12	16	17
Leaflets available to receive through the post	8	7	9	12
Other	6	6	7	5
<b>Base</b>	<b>2,226</b>	<b>1,433</b>	<b>328</b>	<b>465</b>

## 3.5 Booking Behaviour

### Overview

Over two thirds of respondents had booked more than two flights in the last 12 months, with Domestic Economy Full Service, Business respondents and those booking on the Internet the most prolific fliers. The main reason for booking by telephone or with a travel agent was that these approaches offered respondents the reassurance of speaking to someone before committing to a booking.

### Main findings

#### 3.5.1 Number of Flights Booked in the Last 12 months

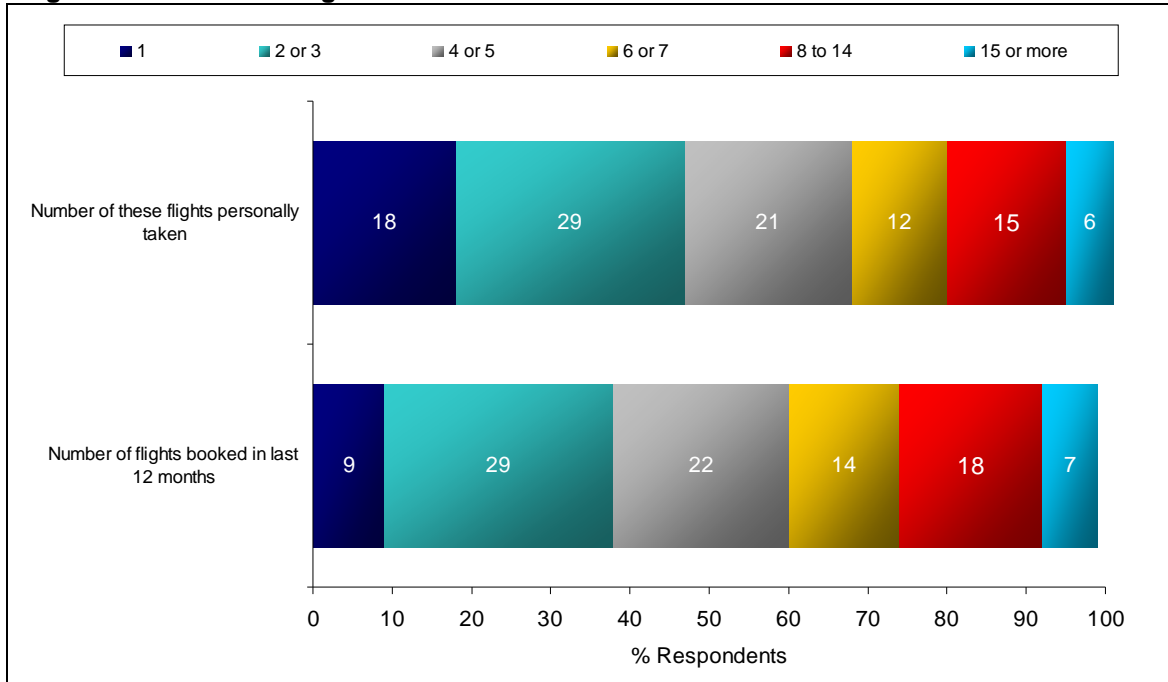
Just less than two-fifths of respondents (38%) had booked three or fewer flights in the last 12 months, with 47% of respondents personally taking three or fewer flights themselves, as seen in Table 32.

**Table 32: Number of flights booked and taken in the last 12 months**

	Total number of flights booked in the last 12 months %	Number of these flights taken by respondent in last 12 months %
1	9	18
2	22	21
3	7	7
4	19	17
5	4	3
6	13	11
7	1	1
8	7	6
9	1	1
10	5	5
11	0	0
12	4	3
13	0	0
14	1	1
15	0	0
16	1	1
17	0	0
18	1	0
20	2	2
More than 20	4	2
<b>Base</b>	<b>2,226</b>	<b>2,226</b>



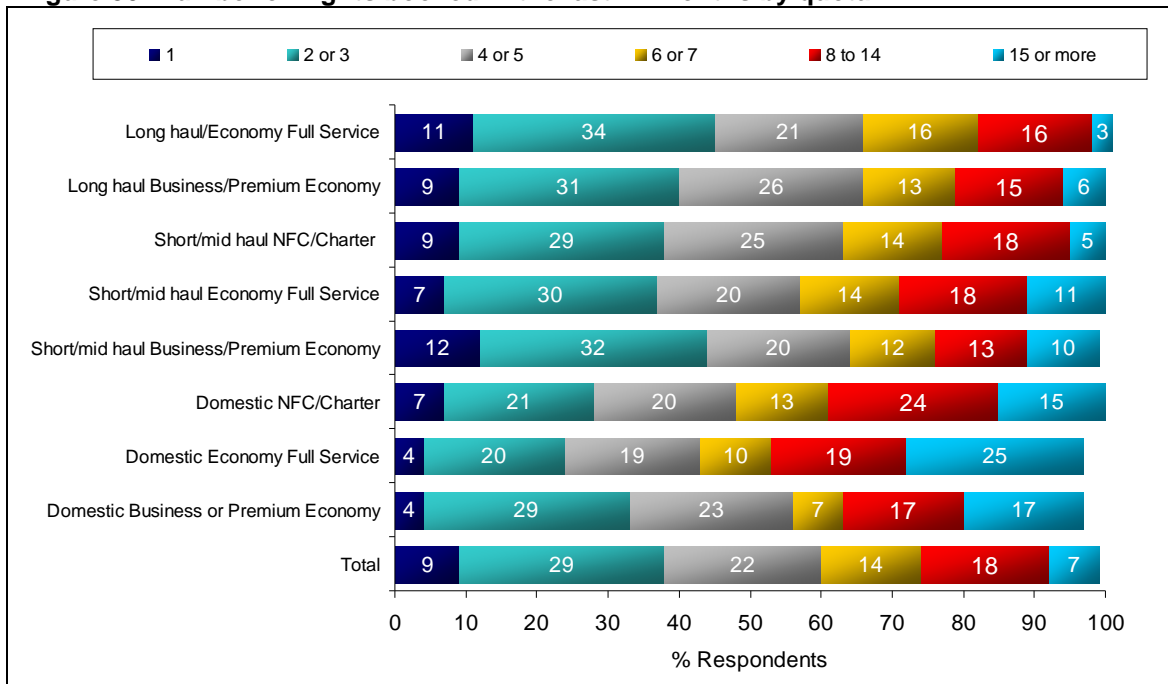
**Figure 29: Number of flights booked and taken in the last 12 months**



Base: All respondents (2,226)

Respondents in the domestic economy full service quota were the most likely to have booked more than 15 flights in the last 12 months (25%), as shown in **Figure 30**.

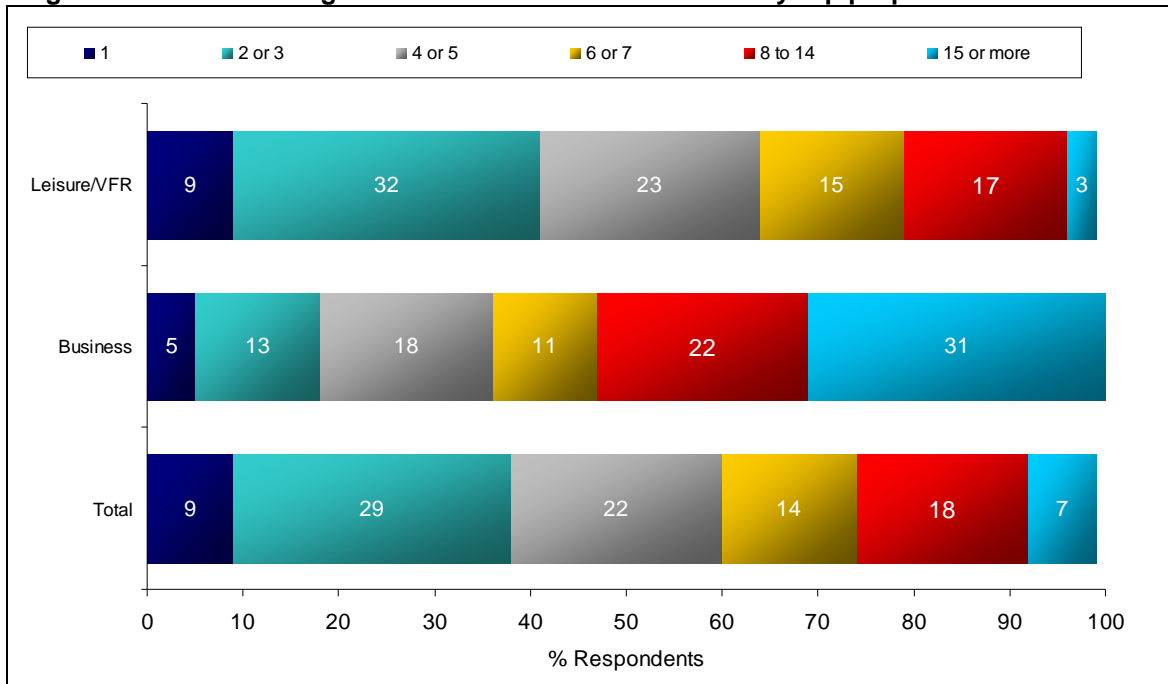
**Figure 30: Number of flights booked in the last 12 months by quota**



Base: All respondents (2,226); Long haul economy full service (489), Long haul business/Premium Economy (52), short/mid haul NFC/Charter (975); Short/mid haul Economy full service (368); Short/mid haul Business/Premium Economy (25); Domestic NFC/Charter (189); domestic economy full service (121); Domestic Business or Premium Economy (7).

Business respondents are significantly more likely to have booked more than 15 flights in the last 12 months than leisure/VFR respondents (31% and 3% respectively), as illustrated in **Figure 31**.

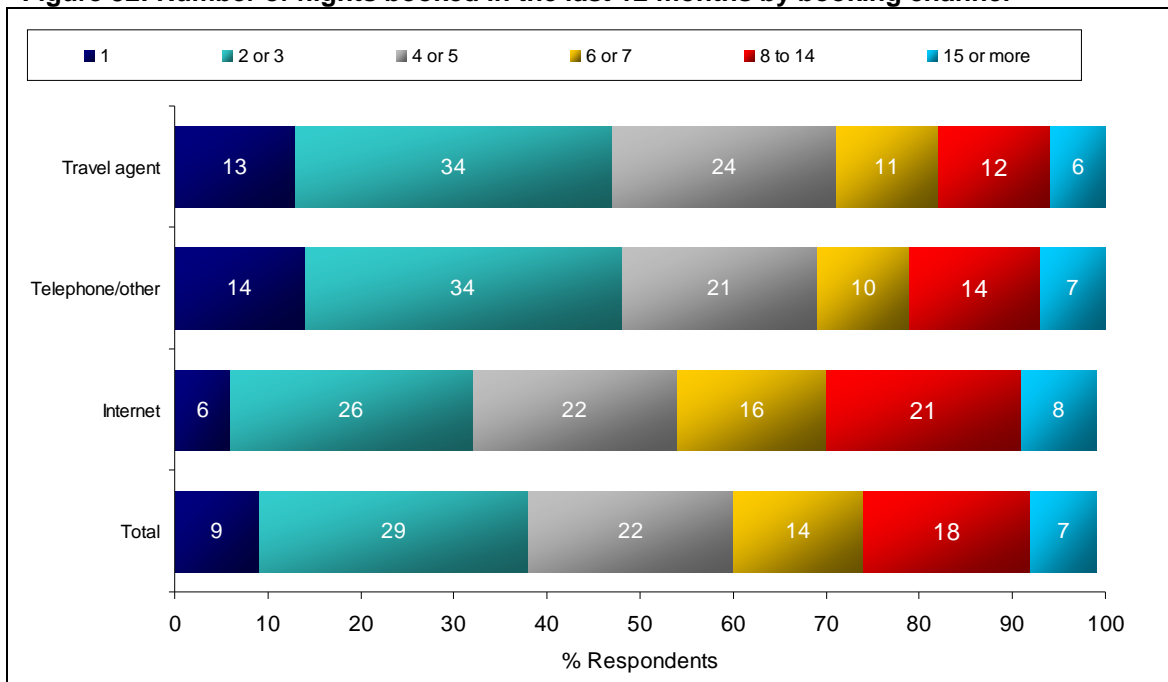
**Figure 31: Number of flights booked in the last 12 months by trip purpose**



Base: All respondents (2,226); leisure/VFR (1,902); business (324)

As shown in **Figure 32** respondents who booked their last flight online are significantly more likely to have booked more than 8 flights in the last 12 months (29%) than those who booked by telephone/other (21%) or with a travel agent (18%).

**Figure 32: Number of flights booked in the last 12 months by booking channel**



Base: All respondents (2226); Internet (1,433); telephone/other (328); travel agent (465)

Most respondents (84%) usually booked flights in the same way they booked their most recent flight, as shown in Table 33.

Those most likely to have booked their flight in a different way to the way they usually book flights include those in the long haul economy full service quota (27%).

**Table 33: Whether most recent flight was booked in the same way respondents usually book flights by quota**

	Total %	Domestic Business or Premium Economy %	Domestic Economy Full Service %	Domestic NFC/Charter %	Short/ mid haul Business/Premium Economy %	Short/ mid haul Economy Full Service %	Short/ mid haul NFC/Charter %	Long haul Business/Premium Economy %	Long haul Economy Full Service %
Yes	84	90	87	95	88	84	86	82	73
No	16	10	13	5	12	16	14	18	27
<b>Base</b>	<b>2,191</b>	<b>7</b>	<b>119</b>	<b>186</b>	<b>24</b>	<b>362</b>	<b>961</b>	<b>51</b>	<b>481</b>

Business respondents were significantly more likely to have booked their flight in the usual way than leisure/VFR respondents (89% of business respondents compared with 83% of leisure/VFR respondents), as stated in Table 34.

**Table 34: Whether most recent flight was booked in the same way respondents usually book flights by trip purpose**

	Total %	Business %	Leisure/VFR %
Yes	84	89	83
No	16	11	17
<b>Base</b>	<b>2,191</b>	<b>321</b>	<b>1,870</b>

Almost all respondents who had booked online had booked their flight in the usual way (96%). This share is significantly higher than for those who had booked with a travel agent (64%) or by telephone/other (56%), as shown in Table 35.

**Table 35: Whether most recent flight was booked in the same way respondents usually book flights by booking channel**

	Total %	Internet %	Telephone/other %	Travel agent %
Yes	84	96	56	64
No	16	4	44	36
<b>Base</b>	<b>2,191</b>	<b>1,416</b>	<b>319</b>	<b>455</b>

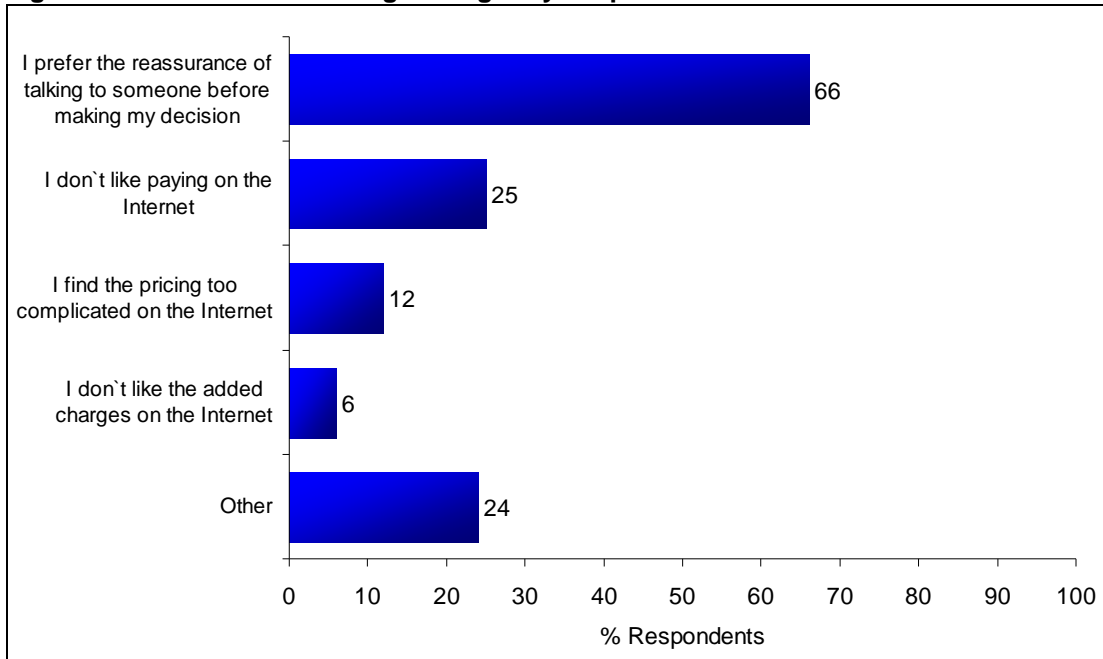
Those respondents who did not book their most recent flight in the same way they usually book flights were asked why they had booked their most recent flight in this different way. Table 36 below shows the reasons mentioned by at least 2% of these respondents. The most common reasons for booking the flight in a different way were that the flight was part of a package (15%), that it was easier/convenient (12%), it was the cheapest option (10%) and a good price/deal (9%) .

**Table 36: Reasons for booking flight in a way respondent does not usually book flights**

	Total %
Part of a package	15
Easier/convenient	12
Cheapest option	10
Good price/deal	9
Discount offered/able to use vouchers/reward points/air miles	6
Company policy	6
Preferable for making group bookings	5
Required detailed help/advice (ash cloud disruption, insurance, etc)	4
Booked after making an enquiry	4
Other	4
Least time consuming	3
Complicated journey (multiple destinations)	3
Last minute decision/spur-of-the-moment	3
Recommended by friend/relative	3
No option to book online (unavailable online, online booking offline)	2
Greater availability of flights (suitable dates and times)	2
Due to limitations of online booking (can't book toddler seats/pay for luggage)	2
Booking an unusual flight/holiday (limited availability)	2
No reason given	7
<b>Base</b>	<b>297</b>

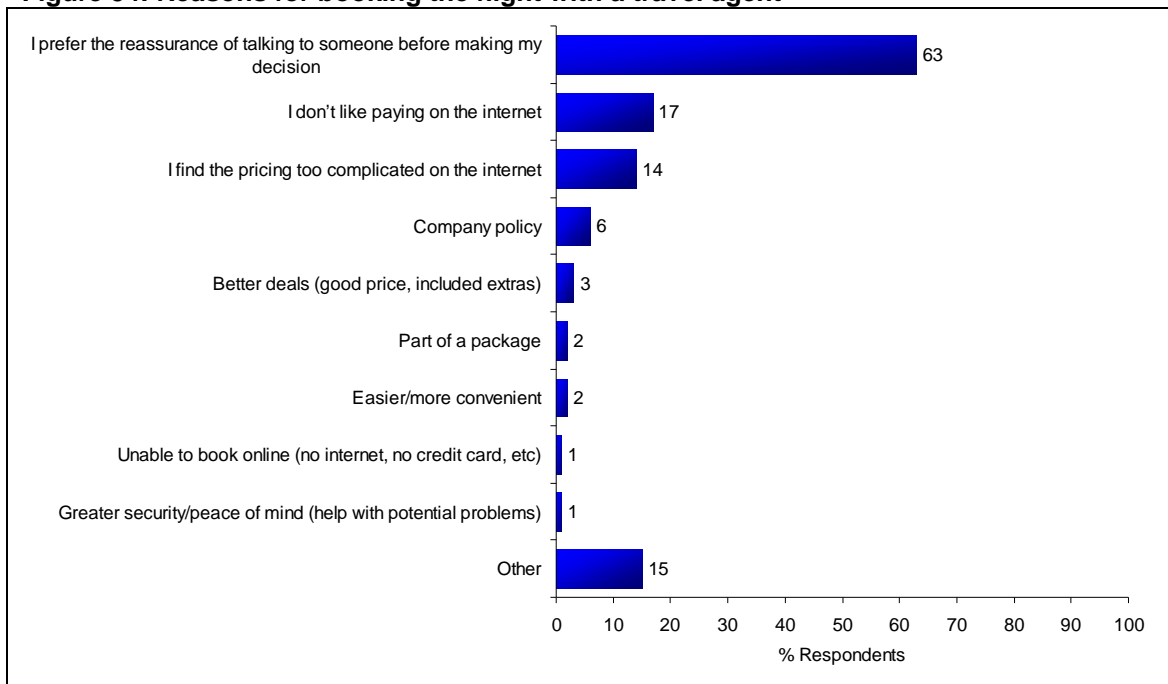
Again, for those respondents who did not book their most recent flight in the same way they usually book flights the main reason for now booking flights over the telephone or at a travel agent was because respondents preferred the reassurance of talking to someone before making their decision (66% of those booking over the telephone; 63% of those booking at a travel agent), as summarised in **Figure 34**.

**Figure33: Reasons for booking the flight by telephone**



Base: All respondents who booked the flight by telephone and usually book flights in this way (152)

**Figure 34: Reasons for booking the flight with a travel agent**



Base: All respondents who booked the flight at a travel agent and usually book flights in this way (299)

Table 37 and Table 38 below show the reasons for booking flights by telephone or with a travel agent for quota groups. Note these figures should be considered indicative only as base sizes for individual quota groups are small.

**Table 37: Reasons for booking the flight by telephone by quota**

	Total %	Domestic Business or Premium Economy %	Domestic Economy Full Service %	Domestic NFC/Charter %	Short/ mid haul Business/ Premium Economy %	Short/ mid haul Economy Full Service %	Short/ mid haul NFC/ Charter %	Long haul Business/ Premium Economy %	Long haul Economy Full Service %
I prefer the reassurance of talking to someone before making my decision	66	25	22	67	57	66	79	57	58
I don't like paying on the Internet	25	44	33	33	24	17	21	14	34
I find the pricing too complicated on the Internet	12	38	11		30	3	15	14	13
I don't like the added charges on the Internet	6	13			5		6	14	13
Other	24		44		5	24	21	43	32
<b>Base</b>	<b>152</b>	<b>2</b>	<b>8</b>	<b>6</b>	<b>4</b>	<b>27</b>	<b>62</b>	<b>3</b>	<b>41</b>

\*Note base sizes are small

**Table 38: Reasons for booking the flight with a travel agent by quota**

	Total %	Domestic Business or Premium Economy %	Domestic Economy Full Service %	Domestic NFC/Charter %	Short/ mid haul Business/ Premium Economy %	Short/ mid haul Economy Full Service %	Short/ mid haul NFC/ Charter %	Long haul Business/ Premium Economy %	Long haul Economy Full Service %
I prefer the reassurance of talking to someone before making my decision	63	54	33	41	68	63	62	81	68
I don't like paying on the internet	17	31	25		40	13	14	24	23
Other (specify)	15	8	8	12		7	23	14	10
I find the pricing too complicated on the internet	14	8		18	22	11	11	10	20
Company policy	6		42	29	4	19			
Better deals (good price, included extras)	3			6		2	3		3
Part of a package	2					4	3		1
Easier/more convenient	2	8		12		2	2		2
Unable to book online (no internet, no credit card, etc)	1						2		1
Greater security/peace of mind (help with potential problems)	1						2		2
<b>Base</b>	<b>299</b>	<b>1</b>	<b>11</b>	<b>11</b>	<b>5</b>	<b>50</b>	<b>118</b>	<b>9</b>	<b>93</b>

\*Note base sizes are small

The following two tables (Table 39 and Table 40) show the reasons for booking flights by telephone or with a travel agent by trip purpose. Note these figures should be considered indicative only as the base size for business respondents is small, particularly for bookings made by telephone.

**Table 39: Reasons for booking the flight by telephone by trip purpose**

	Total %	Business %	Leisure/VFR %
I prefer the reassurance of talking to someone before making my decision	66	76	65
I don't like paying on the Internet	25	17	26
I find the pricing too complicated on the Internet	12	5	13
I don't like the added charges on the Internet	6	3	7
Other	24	24	24
<b>Base</b>	<b>152</b>	<b>18*</b>	<b>134</b>

\*Note base size is small

**Table 40: Reasons for booking the flight by travel agent by trip purpose**

	Total %	Business %	Leisure/VFR %
I prefer the reassurance of talking to someone before making my decision	63	37	67
I don't like paying on the internet	17	9	19
I find the pricing too complicated on the internet	14	6	15
Company policy	6	44	
Better deals (good price, included extras)	3	2	3
Part of a package	2		3
Easier/more convenient	2	3	2
Unable to book online (no internet, no credit card, etc)	1		1
Greater security/peace of mind (help with potential problems)	1		2
Other (specify)	15	9	16
<b>Base</b>	<b>299</b>	<b>39*</b>	<b>260</b>

\*Note base size is small



### 3.6 Disability/Impairment

Five per cent of these respondents have a disability or impairment that makes accessing and or using an airport or flying difficult, as shown in Table 41 below.

**Table 41: Disability/impairment**

	Total %
Yes	5
No	94
Prefer not to say	1
<b>Base</b>	<b>2,226</b>

Just over a third of respondents (37%) feel that it is important (ie very important or quite important to have access to information about the rights of passengers with a disability or reduced mobility, as shown in Table 42 below.

**Table 42: Importance of having access to information about rights for passengers with a disability/reduced mobility**

	Total %
Very important	19
Quite important	18
Neither important nor unimportant	21
Not very important	15
Not at all important	25
Don't know	1
<b>Base</b>	<b>2,226</b>

The main media for information about the rights of passengers with a disability/reduced mobility is online at the time of booking (66%), as summarised in Table 43.

**Table 43: Where passengers would like access to information about rights for passengers with a disability/reduced mobility**

	Total %
Online at the time of booking	66
Leaflets in the seat back of the airplane seat	12
Posters at airports	14
Dedicated website	22
Page on the airline's website	44
Leaflets available to receive through the post	11
Other	6
<b>Base</b>	<b>2,226</b>

# **Appendix A**

## **Significant Differences for Log Cost Models**

**T-Test at 95% Confidence Level for  
Overall Sample Analysis**

	A1	A2	A3 B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B 4E4	B4 E5	B4E6	C1S2	C1S3	C2	C3B2	C3B3	C4
A2	24.54																					
A3B2	-1.03	-0.67																				
A3B3	-2.26	-1.86	-2.29																			
A3B4	-7.45	-6.82	-2.92	-2																		
A4	11.83	10.97	-2.78	-2.16	-0.56																	
B1	4.66	20.93	1.11	2.35	7.61	11.98																
B2	4.94	18.3	1.14	2.38	7.67	12.04	1.47															
B3C2	11.03	10.42	-4.22	-3.64	-2.86	-2.9	11.06	-11.18														
B3C3	13.68	12.86	-3.95	-3.32	-2.38	-2.39	13.61	-13.73	1.45													
B4E1	-7.38	-6.85	-3.06	-2.4	-1.02	-0.64	-7.46	-7.48	1.76	1.06												
B4E2	-7.12	-6.61	-3.05	-2.39	-1.04	-0.67	-7.19	-7.22	1.66	0.96	-0.06											
B4E3	-7.05	-6.53	-2.94	-2.27	-0.84	-0.44	-7.13	-7.16	1.93	1.24	0.23	0.29										
B4E4	-4.91	-4.35	-1.72	-0.93	1.08	1.81	-5.01	-5.04	3.93	3.56	2.87	2.8	2.55									
B4E5	-5.74	-5.2	-2.22	-1.49	0.27	0.86	-5.83	-5.87	3.11	2.59	1.73	1.72	1.43	-1.04								
B4E6	-2.28	-1.7	-0.32	0.59	3.22	4.26	-2.4	-2.45	5.89	5.9	5.47	5.38	5.18	2.79	3.78							
C1S2	-4.52	-3.97	-1.53	-0.74	1.35	2.11	-4.63	-4.68	4.09	3.76	2.23	2.21	2.04	0.25	0.99	-1.7						
C1S3	-5.63	-4.55	-0.77	0.21	3.47	5.39	-5.83	-5.91	7.07	7.72	4.24	4.14	3.98	1.82	2.7	-0.65	1.67					
C2	6.2	18.51	1.18	2.43	7.74	12.12	2.87	1.4	11.18	13.8	7.56	7.3	7.23	5.12	5.94	2.52	4.69	5.97				
C3B2	0.13	0.84	0.98	2.04	5.55	7.15	-0.03	-0.09	8.29	8.7	5.94	5.82	5.71	3.92	4.64	1.85	3.06	3.4	-0.17			
C3B3	-7.06	-6.12	-1.48	-0.6	2.09	3.51	-7.22	-7.28	5.66	5.86	3.06	3	2.82	0.65	1.54	-1.77	0.3	-1.95	-7.34	-6.09		
C4	6.27	23.59	1.12	2.36	7.64	12.01	0.64	-0.97	11.1	13.72	7.49	7.22	7.15	5.03	5.86	2.42	4.66	5.84	-2.95	0.05	7.18	
L	22.13	22.23	24.16	24.17	22.87	22.53	22.17	22.17	21.9	22.05	21.73	21.69	21.71	21.71	21.7	21.71	21.7	22.04	22.17	21.84	22.01	22.17

**Key:**

**A1 Journey time to Airport**

**A2 - Punctuality (percentage of flights over the previous 12 months)**

**A3B2 Baggage Allowance level 2**

**A3B3 Baggage Allowance level 3**

**A3B4 Baggage Allowance level 4**

**A4 On-line check-in Available**

**B1 Security queues - the average length (in minutes) of queues you could expect to experience when going through security checks**

**B2 Number of bags lost per 1,000 passengers**

**B3C2 If you cancel your flight you will be refunded government taxes, subject to an administration fee**

**B3C3 if you cancel your flight you will be refunded government taxes with no administration fee**

**B4E1 Environmental Impact of Flying A = lowest impact**

**B4E2 Environmental Impact of Flying B**

**B4E3 Environmental Impact of Flying C**

**B4E4 Environmental Impact of Flying D**

**B4E5 Environmental Impact of Flying E**

**B4E6 Environmental Impact of Flying F**

**C1S2 Shopping facilities at the departure airport - 10 to 30 shops**

**C1S3 Shopping facilities at the departure airport - Greater than 30 shops**

**C2 Walking distance at the airport - the average time (in minutes) that it takes for you to reach the departure gate after having security**

**been through**

**C3B2 Onboard Catering level 2**

**C3B3 Onboard Catering level 3**

**C4 Check-in queues - the average length (in minutes) of queues you could expect to experience when checking in at the airport**

**L Log cost**

**No significant difference at a 95% confidence level coded red.**



**T-Test at 95% Confidence Level for Domestic Full Service Economy**

	A1	A2	A3 B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B4 E4	B4 E5	B4 E6	C1 S2	C1 S3	C2	C3 B2	C3 B3	C4
A2	-7.19																					
A3B2	1.63	1.74																				
A3B3	1.16	1.28	-1.24																			
A3B4	-2.01	-1.8	-2.68	-2.21																		
A4	-3.37	-3.11	-2.35	-2.08	-0.27																	
B1	1.17	5.15	-1.61	-1.14	2.06	3.39																
B2	-1.99	4.96	-1.65	-1.19	1.97	3.3	-2.53															
B3C2	-2.6	-2.38	-2.35	-2.03	-0.25	0.02	-2.57	-2.55														
B3C3	-3.12	-2.83	-2.36	-2.02	-0.09	0.29	-3.04	-3.03	0.41													
B4E1	-1.28	-0.97	-1.89	-1.49	0.98	1.64	-1.33	-1.21	1.6	1.61												
B4E2	-1.43	-1.14	-1.94	-1.55	0.8	1.39	-1.46	-1.36	1.43	1.39	-0.29											
B4E3	-2.37	-2.18	-2.34	-2.03	-0.38	-0.17	-2.35	-2.31	-0.25	-0.53	-1.88	-1.67										
B4E4	-1.93	-1.69	-2.12	-1.77	0.29	0.72	-1.93	-1.86	0.84	0.64	-1.09	-0.79	1.1									
B4E5	-1.76	-1.47	-2.03	-1.66	0.6	1.14	-1.77	-1.68	1.16	1.11	-0.66	-0.34	1.43	0.49								
B4E6	-0.15	0.15	-1.56	-1.12	1.56	2.27	-0.22	-0.08	2	2.11	1.02	1.21	2.25	1.68	1.53							
C1S2	-1.32	-1.1	-1.94	-1.57	0.54	0.96	-1.35	-1.26	0.92	0.83	-0.38	-0.21	1	0.31	0.01	-0.98						
C1S3	-2.26	-1.94	-2.12	-1.76	0.48	1.06	-2.26	-2.17	1.03	1.01	-0.71	-0.47	1.08	0.21	-0.2	-1.41	-0.19					
C2	-0.53	4.78	-1.64	-1.17	2	3.33	-1.7	0.9	2.55	3.03	1.25	1.39	2.33	1.89	1.72	0.12	1.29	2.18				
C3B2	-0.27	0	-1.59	-1.16	1.43	2.07	-0.33	-0.21	1.82	1.89	0.64	0.79	1.79	1.26	1.02	-0.1	0.76	1.5	-0.25			
C3B3	-0.28	0.08	-1.62	-1.18	1.59	2.4	-0.36	-0.2	2.04	2.19	0.77	0.93	1.96	1.43	1.19	-0.07	0.81	1.66	-0.25	0.07		
C4	1.25	4.95	-1.61	-1.13	2.07	3.4	0.26	2.4	2.59	3.06	1.34	1.48	2.37	1.95	1.79	0.23	1.35	2.23	2.16	0.34	0.37	
L	3.6	3.63	3.36	3.52	3.85	3.85	3.61	3.61	3.59	3.6	3.59	3.58	3.58	3.58	3.59	3.58	3.56	3.59	3.61	3.57	3.59	3.61

**T-Test at 95% Confidence Level for  
Domestic NFC/Charter**

	A1	A2	A3 B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B4 E4	B4 E5	B4 E6	C1 S2	C1 S3	C2	C3 B2	C3 B3	C4
A2	-9.89																					
A3B2	0.68	0.84																				
A3B3	0.57	0.75	-0.37																			
A3B4	-1.04	0.72	-1.25	-1.12																		
A4	-5.77	5.41	-2.33	-2.45	-2.22																	
B1	1.43	7.94	-0.65	-0.54	1.09	5.81																
B2	1.37	7.18	-0.65	-0.53	1.1	5.82	0.21															
B3C2	-4.02	3.74	-2.39	-2.42	-2.24	-0.07	-4.01	-4.05														
B3C3	-4.3	3.87	-2.02	-2.03	-1.64	1.24	-4.26	-4.3	1.51													
B4E1	-1.99	1.71	-1.55	-1.51	-0.8	1.49	-2.02	-2.03	1.43	0.65												
B4E2	-3	2.76	-2.11	-2.12	-1.72	0.28	-3.01	-3.02	0.33	-0.6	-1.27											
B4E3	-2.28	2.03	-1.75	-1.73	-1.14	0.94	-2.3	-2.31	0.96	0.13	-0.52	0.77										
B4E4	-1.84	1.56	-1.47	-1.43	-0.68	1.62	-1.87	-1.87	1.56	0.79	0.16	1.4	0.64									
B4E5	-2.3	2.03	-1.7	-1.67	-1.05	1.19	-2.33	-2.33	1.18	0.32	-0.34	0.99	0.19	-0.49								
B4E6	-1.51	1.25	-1.35	-1.3	-0.5	1.7	-1.55	-1.55	1.59	0.9	0.33	1.56	0.82	0.19	0.71							
C1S2	-3.18	2.97	-2.37	-2.39	-2.11	-0.43	-3.19	-3.2	-0.36	-1.2	-1.45	-0.59	-1.08	-1.54	-1.24	-1.61						
C1S3	-2.27	-1.8	-1.36	-1.31	-0.4	2.8	-2.33	-2.34	2.34	1.67	0.57	1.66	0.97	0.43	0.86	0.23	2.38					
C2	1.49	6.66	-0.64	-0.52	1.11	5.83	0.47	0.28	4.05	4.33	2.05	3.04	2.33	1.89	2.35	1.57	3.17	2.33				
C3B2	0.6	0.91	-0.31	-0.18	1.15	3.77	0.55	0.54	3.23	2.86	1.86	2.66	2.12	1.74	2.08	1.53	2.64	1.87	0.53			
C3B3	-1.28	0.86	-1.08	-1.01	0.07	3.16	-1.34	-1.35	2.64	2.09	0.97	1.98	1.32	0.83	1.24	0.62	2.2	0.71	-1.36	-1.77		
C4	1.65	8.37	-0.65	-0.54	1.09	5.82	0.1	-0.1	4.04	4.31	2.03	3.03	2.31	1.88	2.34	1.55	3.18	2.31	-0.51	-0.54	1.33	
L	7.74	7.79	7.97	7.95	7.71	8.17	7.76	7.76	7.66	7.72	7.61	7.6	7.58	7.61	7.61	7.58	7.54	7.7	7.76	7.61	7.68	7.76

**T-Test at 95% Confidence Level for  
Short/Mid Haul Full Service Business/Premium Economy**

	A1	A2	A3 B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B4 E4	B4 E5	B4 E6	C1 S2	C1 S3	C2	C3 B2	C3 B3	C4	
A2	-4.36																						
A3B2	-1.1	-1.05																					
A3B3	-0.56	-0.5	1.11																				
A3B4	-0.01	0.1	1.13	0.55																			
A4	-1.35	-1.19	0.52	0.05	-0.7																		
B1	0.76	2.42	1.13	0.59	0.06	1.41																	
B2	1.68	2.66	1.2	0.66	0.19	1.59	1.29																
B3C2	-2.08	-2.05	-1.24	-1.51	-2	-1.79	-2.08	-2.1															
B3C3	-2.07	-2.02	-0.75	-1.12	-1.88	-1.56	-2.07	-2.1	1.32														
B4E1	-1.96	-1.94	-1.22	-1.47	-1.9	-1.7	-1.96	-1.98	-0.1	-1.05													
B4E2	-1.85	-1.82	-1.14	-1.38	-1.79	-1.6	-1.85	-1.87	-0.01	-0.92	0.11												
B4E3	-1.71	-1.68	-0.92	-1.2	-1.65	-1.42	-1.72	-1.74	0.45	-0.52	0.65	0.54											
B4E4	-1.86	-1.83	-1.12	-1.37	-1.8	-1.59	-1.86	-1.88	0.08	-0.85	0.2	0.1	-0.44										
B4E5	-1.6	-1.57	-0.84	-1.11	-1.54	-1.31	-1.61	-1.63	0.55	-0.39	0.76	0.64	0.13	0.55									
B4E6	0.57	0.61	1.12	0.8	0.54	0.89	0.55	0.5	1.84	1.61	2.07	1.97	1.88	2.02	1.8								
C1S2	-0.27	-0.19	0.74	0.29	-0.21	0.38	-0.3	-0.4	1.86	1.62	1.78	1.68	1.51	1.68	1.41	-0.63							
C1S3	-1.97	-1.85	0.12	-0.38	-1.35	-0.8	-2	-2.1	1.58	1.18	1.51	1.4	1.18	1.39	1.07	-1.17	-1.15						
C2	1.65	3.23	1.16	0.62	0.11	1.49	0.7	-0.68	2.1	2.11	1.98	1.87	1.74	1.88	1.63	-0.53	0.34	2.02					
C3B2	-1.03	-0.95	0.31	-0.14	-0.82	-0.3	-1.06	-1.15	1.63	1.26	1.57	1.46	1.26	1.45	1.16	-0.96	-0.48	0.32	-1.11				
C3B3	-1.97	-1.85	0.11	-0.38	-1.36	-0.8	-2	-2.1	1.57	1.17	1.51	1.4	1.18	1.39	1.07	-1.17	-0.97	-0.01	-2.03	-0.41			
C4	2.2	4.49	1.15	0.61	0.09	1.47	0.54	-0.96	2.09	2.1	1.98	1.87	1.73	1.88	1.62	-0.54	0.33	2.01	-0.4	1.08	2.01		
L	4.6	4.62	5.15	4.95	4.54	4.7	4.6	4.6	4.25	4.44	4.18	4.15	4.21	4.17	4.19	4.16	4.49	4.56	4.6	4.51	4.56	4.6	



**T-Test at 95% Confidence Level for  
Short/Mid Haul Full Service Economy**

	A1	A2	A3B2	A3B3	A3B4	A4	B1	B2	B3C2	B3C3	B4E1	B4E2	B4E3	B4E4	B4E5	B4E6	C1S2	C1S3	C2	C3B2	C3B3	C4	
A2	-12.83																						
A3B2	0.82	1.01																					
A3B3	-0.06	0.15	-1.85																				
A3B4	-2	-1.65	-1.87	-1.05																			
A4	-4.97	-4.49	-2.19	-1.65	-1.1																		
B1	3.91	11.03	-0.74	0.15	2.16	5.14																	
B2	2.68	9.21	-0.75	0.13	2.13	5.1	-0.62																
B3C2	-5.13	-4.86	-3.31	-2.81	-2.8	-2.19	-5.19	-5.21															
B3C3	-6.83	-6.45	-3.4	-2.88	-3.06	-2.5	-6.83	-6.84	0.42														
B4E1	-4.21	-3.98	-3.1	-2.6	-2.42	-1.81	-4.27	-4.25	0.05	-0.21													
B4E2	-3.1	-2.88	-2.52	-1.99	-1.57	-0.86	-3.17	-3.15	0.85	0.69	1.09												
B4E3	-3.52	-3.28	-2.67	-2.14	-1.77	-1.04	-3.6	-3.57	0.82	0.64	0.94	-0.11											
B4E4	-2.22	-1.97	-1.94	-1.35	-0.69	0.18	-2.31	-2.29	1.83	1.82	2.36	1.18	1.35										
B4E5	-3.13	-2.89	-2.45	-1.9	-1.45	-0.68	-3.21	-3.19	1.16	1.03	1.43	0.28	0.4	-0.93									
B4E6	-1.07	-0.8	-1.27	-0.6	0.36	1.41	-1.18	-1.16	2.83	3.05	3.7	2.39	2.69	1.35	2.33								
C1S2	-1.48	-1.17	-1.44	-0.76	0.21	1.38	-1.61	-1.58	2.91	3.16	2.54	1.69	1.9	0.84	1.58	-0.15							
C1S3	-3.53	-2.98	-1.86	-1.15	-0.23	1.35	-3.72	-3.68	3.14	3.79	2.6	1.6	1.85	0.61	1.48	-0.59	-0.51						
C2	2.38	9.38	-0.77	0.12	2.11	5.08	-1.03	-0.41	5.18	6.86	4.26	3.15	3.58	2.28	3.19	1.15	1.55	3.62					
C3B2	1.49	1.84	-0.03	0.82	2.47	4.01	1.34	1.36	4.81	5.44	4.24	3.36	3.67	2.64	3.36	1.74	1.71	3.21	1.41				
C3B3	-1.72	-1.19	-1.33	-0.57	0.7	2.45	-1.93	-1.89	3.81	4.58	3.21	2.21	2.51	1.3	2.15	0.17	0.34	1.35	-1.86	-2.99			
C4	3.25	12.53	-0.78	0.11	2.09	5.06	-1.85	-0.87	5.17	6.85	4.25	3.14	3.57	2.27	3.18	1.13	1.56	3.62	-0.43	-1.4	1.83		
L	11.41	11.46	11.9	12.1	11.55	11.52	11.43	11.43	11.23	11.34	11.12	11.05	11.12	11.09	11.11	11.12	11.2	11.36	11.43	11.23	11.34	11.43	

**T-Test at 95% Confidence Level for  
Short/Mid Haul NFC/Charter**

	A1	A2	A3 B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B4 E4	B4 E5	B4 E6	C1 S2	C1 S3	C2	C3 B2	C3 B3	C4	
A2	-13.86																						
A3B2	-2.52	-2.31																					
A3B3	-2.44	-2.22	0.7																				
A3B4	-4.73	-4.39	-0.08	-0.39																			
A4	-6.54	-6.05	0.09	-0.18	0.27																		
B1	1	11.59	2.54	2.46	4.77	6.55																	
B2	2.61	10.66	2.58	2.5	4.84	6.63	2.21																
B3C2	-6.04	-5.63	-0.26	-0.56	-0.31	-0.79	-6	-6.08															
B3C3	-7.29	-6.78	-0.14	-0.45	-0.12	-0.61	-7.19	-7.25	0.45														
B4E1	-4.78	-4.44	-0.17	-0.45	-0.15	-0.5	-4.77	-4.81	0.18	-0.08													
B4E2	-4.69	-4.36	-0.21	-0.49	-0.22	-0.58	-4.68	-4.72	0.08	-0.18	-0.12												
B4E3	-4.78	-4.44	-0.21	-0.49	-0.22	-0.58	-4.76	-4.8	0.08	-0.17	-0.11	0.01											
B4E4	-3.24	-2.85	0.74	0.52	1.29	1.29	-3.25	-3.31	1.93	1.9	2.17	2.3	2.27										
B4E5	-4.36	-4.02	0.02	-0.24	0.15	-0.13	-4.36	-4.4	0.56	0.35	0.47	0.58	0.56	-1.7									
B4E6	-2.42	-2.01	1.15	0.96	1.93	2.07	-2.43	-2.5	2.6	2.71	3.05	3.24	3.2	0.99	2.56								
C1S2	-2.13	-1.76	1.16	0.97	1.87	1.96	-2.15	-2.21	2.47	2.49	2.08	2.11	2.13	0.67	1.76	0.04							
C1S3	-2.13	-1.36	1.86	1.72	3.38	4.24	-2.16	-2.3	4.45	5.04	3.58	3.55	3.61	1.95	3.18	1.16	1.11						
C2	3.28	10.41	2.6	2.53	4.88	6.67	2.86	0.98	6.09	7.29	4.86	4.76	4.85	3.36	4.45	2.55	2.23	2.35					
C3B2	-0.92	-0.43	1.96	1.83	3.26	3.74	-0.95	-1.04	4.03	4.31	3.4	3.39	3.43	1.97	3.06	1.28	0.99	0.42	-1.1				
C3B3	-4.39	-3.8	0.95	0.74	1.79	2.06	-4.39	-4.48	2.71	2.93	2.09	2.12	2.15	0.31	1.69	0.49	0.44	2.59	-4.5	3.08			
C4	2.72	12.45	2.56	2.49	4.82	6.6	1.81	-0.71	6.05	7.26	4.81	4.72	4.81	3.3	4.4	2.49	2.19	2.24	-2.12	1	4.41		
L	9.92	9.98	11.58	11.27	10.55	10.23	9.94	9.94	9.87	9.9	9.81	9.8	9.81	9.81	9.8	9.81	9.78	9.9	9.94	9.84	9.89	9.94	

**T-Test at 95% Confidence Level for Long Haul: Business/Premium Economy**

	A1	A2	A3 B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B4 E4	B4 E5	B4 E6	C1 S2	C1 S3	C2	C3 B2	C3 B3	C4	
A2	-4.08																						
A3B2	-0.27	-0.21																					
A3B3	-0.08	-0.02	0.43																				
A3B4	-0.4	-0.29	0.05	-0.15																			
A4	-3.93	-3.82	-1.03	-1.27	-1.64																		
B1	1.52	3.08	0.32	0.13	0.49	4.02																	
B2	1.57	2.8	0.33	0.15	0.52	4.05	0.37																
B3C2	-2.92	-2.87	-2.03	-2.19	-2.49	-1.74	-2.93	-2.96															
B3C3	-3.47	-3.42	-2.14	-2.33	-2.79	-1.95	-3.47	-3.5	0.3														
B4E1	-1.17	-1.13	-0.76	-0.89	-0.93	-0.05	-1.2	-1.22	1.39	1.37													
B4E2	-0.33	-0.29	-0.1	-0.22	-0.15	0.79	-0.37	-0.38	1.94	2.03	0.88												
B4E3	0.12	0.17	0.27	0.15	0.28	1.32	0.08	0.07	2.27	2.41	1.35	0.44											
B4E4	-1.78	-1.75	-1.29	-1.42	-1.52	-0.77	-1.8	-1.82	0.72	0.61	-0.88	-1.67	-1.98										
B4E5	-1.07	-1.03	-0.69	-0.82	-0.84	0.03	-1.1	-1.12	1.39	1.4	0.08	-0.76	-1.21	0.92									
B4E6	-0.89	-0.85	-0.52	-0.65	-0.65	0.3	-0.93	-0.94	1.6	1.68	0.34	-0.52	-0.94	1.13	0.27								
C1S2	-0.71	-0.67	-0.46	-0.57	-0.54	0.2	-0.74	-0.75	1.27	1.24	0.19	-0.35	-0.65	0.68	0.14	-0.02							
C1S3	-1.55	-1.51	-1.03	-1.17	-1.26	-0.38	-1.59	-1.6	1.01	0.97	-0.24	-0.86	-1.23	0.34	-0.29	-0.5	-0.59						
C2	1.65	2.31	0.4	0.22	0.64	4.13	1.02	0.78	3	3.56	1.27	0.43	-0.01	1.87	1.17	1	0.77	1.61					
C3B2	-1.36	-1.33	-1.1	-1.19	-1.21	-0.66	-1.38	-1.39	0.35	0.26	-0.54	-0.99	-1.25	-0.1	-0.58	-0.73	-0.71	-0.49	-1.41				
C3B3	-2.07	-2.04	-1.6	-1.72	-1.83	-1.19	-2.09	-2.1	0.1	-0.02	-0.93	-1.46	-1.77	-0.4	-0.97	-1.17	-1.26	-1.19	-2.09	-0.45			
C4	2.14	2.93	0.41	0.23	0.66	4.18	1.33	1.01	3	3.57	1.27	0.44	0	1.87	1.17	1	0.78	1.61	0.1	1.39	2.09		
L	7.29	7.31	7.74	7.57	7.4	7.46	7.3	7.3	6.9	7.06	6.73	6.69	6.76	6.68	6.7	6.77	6.45	6.79	7.3	6.16	6.57	7.3	

**T-Test at 95% Confidence Level for  
Long Haul: Economy Full Service**

	A1	A2	A3 B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B4 E4	B4 E5	B4 E6	C1 S2	C1 S3	C2	C3 B2	C3 B3	C4	
A2	-12.05																						
A3B2	1.03	1.21																					
A3B3	-1.19	-1	-4.48																				
A3B4	-5.46	-5.18	-3.89	-1.88																			
A4	-7.36	-6.93	-3.16	-1.5	0.48																		
B1	1.79	9.72	-1	1.22	5.53	7.42																	
B2	2.69	8.84	-0.97	1.26	5.59	7.49	1.22																
B3C2	-5.83	-5.57	-3.89	-2.29	-0.95	-1.56	-5.87	-5.96															
B3C3	-7.43	-7.06	-3.82	-2.07	-0.44	-1.18	-7.42	-7.55	0.89														
B4E1	-2.64	-2.42	-2.4	-0.79	1.01	0.74	-2.68	-2.71	1.78	1.45													
B4E2	-3.18	-2.96	-2.72	-1.14	0.53	0.21	-3.21	-3.24	1.28	0.93	-0.56												
B4E3	-1.71	-1.48	-1.84	-0.19	1.79	1.62	-1.75	-1.79	2.51	2.28	0.93	1.48											
B4E4	-1.59	-1.37	-1.77	-0.12	1.88	1.71	-1.63	-1.67	2.59	2.4	1.07	1.59	0.11										
B4E5	-0.39	-0.18	-1.04	0.62	2.73	2.64	-0.43	-0.47	3.33	3.28	2.07	2.51	1.17	1.05									
B4E6	0.38	0.61	-0.58	1.16	3.5	3.51	0.34	0.29	3.97	4	2.94	3.3	1.98	1.9	0.77								
C1S2	-2.49	-2.3	-2.39	-0.86	0.77	0.5	-2.53	-2.56	1.46	1.13	-0.13	0.25	-0.76	-0.84	-1.57	-2.14							
C1S3	-3.45	-3.03	-2.24	-0.32	2.35	2.37	-3.51	-3.59	3.17	3.25	0.73	1.24	-0.12	-0.22	-1.2	-1.97	0.95						
C2	3.87	9.54	-0.93	1.3	5.65	7.57	2.34	1.06	5.95	7.58	2.76	3.29	1.83	1.72	0.52	-0.25	2.58	3.65					
C3B2	0.48	0.76	-0.6	1.26	3.94	4.07	0.43	0.38	4.49	4.64	2.35	2.77	1.62	1.54	0.61	0.02	1.92	2.36	0.33				
C3B3	-5.48	-5.1	-3.08	-1.26	0.85	0.48	-5.53	-5.59	1.83	1.52	-0.42	0.09	-1.26	-1.35	-2.26	-3.07	-0.2	-1.92	-5.67	-4.73			
C4	1.63	11.28	-1.01	1.21	5.52	7.4	-0.52	-1.72	5.85	7.45	2.66	3.2	1.73	1.62	0.42	-0.35	2.53	3.51	-2.94	-0.45	5.47		
L	16.53	16.56	17.2	17.59	16.72	16.62	16.54	16.54	16.27	16.42	16.09	16.09	16.08	16.07	16	16.06	15.96	16.41	16.54	16.2	16.4	16.54	

**T-Test at 95% Confidence Level for  
Access to Environmental Impact – Unimportant**

	A1	A2	A3 B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B4 E4	B4 E5	B4 E6	C1 S2	C1 S3	C2	C3 B2	C3 B3	C4	
A2	-13.4																						
A3B2	-1.19	-0.96																					
A3B3	-1.98	-1.72	-1.27																				
A3B4	-6.12	-5.75	-1.99	-1.5																			
A4	-5.93	-5.4	-0.85	-0.5	1.51																		
B1	2.66	12.5	1.23	2.02	6.21	6.01																	
B2	2.72	11.36	1.25	2.04	6.23	6.04	0.64																
B3C2	-6.11	-5.68	-1.49	-1.1	0.48	-1.27	-6.15	-6.22															
B3C3	-7.98	-7.39	-1.35	-0.9	0.96	-1.04	-7.95	-8.03	0.66														
B4E1	-2.91	-2.48	-0.29	0.21	2.38	1.14	-2.97	-2.99	2.14	2.03													
B4E2	-2.61	-2.2	-0.21	0.3	2.46	1.26	-2.68	-2.69	2.12	2.09	0.18												
B4E3	-2.66	-2.27	-0.29	0.21	2.28	1.08	-2.72	-2.74	2.09	1.93	0	-0.16											
B4E4	-0.88	-0.44	0.65	1.26	3.85	2.85	-0.96	-0.98	3.55	3.75	2.08	1.82	1.88										
B4E5	-3.38	-2.98	-0.59	-0.1	1.85	0.55	-3.43	-3.45	1.59	1.39	-0.67	-0.79	-0.6	-2.54									
B4E6	-2.58	-2.16	-0.17	0.34	2.53	1.34	-2.64	-2.65	2.21	2.2	0.25	0.08	0.24	-1.76	0.93								
C1S2	-1.9	-1.52	0.05	0.57	2.74	1.63	-1.97	-1.99	2.47	2.4	0.52	0.38	0.49	-0.87	0.95	0.33							
C1S3	-3.4	-2.71	0.08	0.67	3.56	2.4	-3.5	-3.54	3.36	3.7	0.71	0.53	0.66	-1.09	1.25	0.47	0.04						
C2	3.36	10.68	1.27	2.07	6.28	6.09	1.64	1.04	6.21	8.06	3.04	2.75	2.78	1.03	3.5	2.71	2.02	3.57					
C3B2	-0.59	-0.13	0.8	1.43	4.13	3.17	-0.67	-0.7	3.89	4.08	1.72	1.55	1.64	0.22	2.15	1.51	0.91	1.51	-0.76				
C3B3	-4.46	-3.89	-0.48	0.03	2.43	1.02	-4.54	-4.56	2.15	2.13	-0.31	-0.45	-0.29	-2.01	0.25	-0.52	-0.75	1.52	-	-4.6	-3.34		
C4	3.43	13.34	1.24	2.03	6.22	6.03	0.43	-0.28	6.17	8.01	2.98	2.69	2.73	0.97	3.45	2.65	1.98	3.51	-1.63	0.68	4.51		
L	13.05	13.1	14.49	14.5	13.57	13.09	13.07	13.07	12.95	13.02	12.89	12.87	12.85	12.88	12.87	12.87	12.83	13	13.07	12.89	12.98	13.07	

**T-Test at 95% Confidence Level for  
Access to Environmental Impact – Important**

	A1	A2	A3B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B4 E4	B4 E5	B4 E6	C1 S2	C1 S3	C2	C3 B2	C3 B3	C4	
A2	14.74	-																					
A3B2	-0.05	0.16																					
A3B3	-0.38	-0.16	-0.66																				
A3B4	-3.79	-3.42	-2.03	-1.74																			
A4	-7.74	-7.23	-2.34	-2.26	-1.07																		
B1	1.88	11.34	0.08	0.41	3.86	7.81																	
B2	3.31	10.16	0.14	0.47	3.95	7.92	2.13																
B3C2	-5.95	-5.64	-3.01	-2.9	-2.15	-1.47	-5.96	-6.04															
B3C3	-7.27	-6.85	-2.91	-2.79	-1.98	-1.18	-7.23	-7.31	0.78														
B4E1	-5.6	-5.37	-3.39	-3.29	-2.72	-2.22	-5.61	-5.64	-1.08	-1.64													
B4E2	-5.86	-5.64	-3.63	-3.55	-3.08	-2.63	-5.86	-5.89	-1.59	-2.18	-0.65												
B4E3	-5.53	-5.29	-3.32	-3.23	-2.63	-2.1	-5.53	-5.57	-0.94	-1.5	0.16	0.81											
B4E4	-4.5	-4.23	-2.59	-2.45	-1.51	-0.8	-4.52	-4.56	0.43	0	1.86	2.39	1.65										
B4E5	-4.84	-4.59	-2.84	-2.72	-1.91	-1.27	-4.85	-4.89	-0.05	-0.54	1.25	1.82	1.05	-0.59									
B4E6	-1.38	-1.09	-0.75	-0.52	1.23	2.37	-1.42	-1.5	3.12	3.09	4.75	5.08	4.62	3.45	3.81								
C1S2	-4.02	-3.72	-2.11	-1.95	-0.74	0.18	-4.06	-4.13	1.36	1.06	2.09	2.49	1.99	0.82	1.23	-1.81							
C1S3	-4.01	-3.42	-1.24	-1.01	1.07	3	-4.08	-4.21	3.61	3.92	3.9	4.26	3.8	2.59	3.01	-0.53	2.15						
C2	3.6	10.62	0.14	0.47	3.96	7.93	2.17	0.14	6.03	7.34	5.67	5.92	5.6	4.58	4.92	1.5	4.09	4.18					
C3B2	1.04	1.44	0.52	0.84	3.47	5.29	0.97	0.87	5.21	5.58	5.25	5.5	5.18	4.26	4.57	1.72	3.29	3.24	0.87				
C3B3	-4.3	-3.75	-1.42	-1.2	0.7	2.45	-4.35	-4.47	3.26	3.44	3.63	4	3.53	2.3	2.73	-0.81	1.42	-0.54	-4.45	-4.36			
C4	3.2	13.76	0.09	0.42	3.88	7.84	0.66	-1.67	5.98	7.29	5.63	5.88	5.56	4.54	4.87	1.44	4.07	4.09	-2.12	-0.94	4.34		
L	12.2	12.26	13	12.93	12.59	12.68	12.22	12.22	12.04	12.13	11.91	11.9	11.92	11.93	11.92	11.91	11.98	12.15	12.22	12.04	12.14	12.22	

**T-Test at 95% Confidence Level for  
Access to Environmental Impact – Neutral**

	A1	A2	A3 B2	A3 B3	A3 B4	A4	B1	B2	B3 C2	B3 C3	B4 E1	B4 E2	B4 E3	B4 E4	B4 E5	B4 E6	C1 S2	C1 S3	C2	C3 B2	C3 B3	C4
A2	-																					
A2	13.56																					
A3B2	-0.62	-0.42																				
A3B3	-1.81	-1.58	-2.31																			
A3B4	-3.22	-2.87	-1.03	-0.11																		
A4	-6.99	-6.53	-1.6	-0.94	-1.3																	
B1	3.13	11.95	0.67	1.87	3.33	7.07																
B2	2.48	10.15	0.67	1.87	3.33	7.07	0.05															
B3C2	-6.64	-6.31	-2.5	-1.89	-2.66	-1.84	-6.67	-6.71														
B3C3	-8.37	-7.93	-2.35	-1.69	-2.55	-1.61	-8.34	-8.38	0.85													
B4E1	-3.64	-3.33	-1.37	-0.64	-0.76	0.41	-3.7	-3.69	1.83	1.58												
B4E2	-2.62	-2.32	-0.87	-0.1	0	1.26	-2.69	-2.68	2.63	2.4	1.06											
B4E3	-3.07	-2.74	-0.99	-0.21	-0.15	1.18	-3.15	-3.14	2.53	2.36	0.88	-0.21										
B4E4	-2.49	-2.18	-0.8	-0.01	0.12	1.4	-2.56	-2.55	2.72	2.56	1.19	0.16	0.37									
B4E5	-0.85	-0.54	0.06	0.95	1.39	2.8	-0.93	-0.93	3.85	3.8	2.72	1.8	2.03	1.58								
B4E6	0.19	0.53	0.64	1.62	2.31	3.91	0.11	0.1	4.62	4.85	3.92	2.93	3.35	2.69	1.08							
C1S2	-0.97	-0.64	0.03	0.93	1.39	2.88	-1.05	-1.05	3.86	3.89	1.99	1.26	1.47	1.16	-0.04	-0.83						
C1S3	-1.67	-0.99	0.13	1.18	2.03	4.61	-1.83	-1.83	5.25	6.02	2.65	1.72	2.05	1.6	0.09	-0.91	0.16					
C2	3.8	11.01	0.7	1.9	3.38	7.13	1.36	1.13	6.72	8.43	3.75	2.74	3.2	2.61	0.97	-0.06	1.09	1.92				
C3B2	-0.46	-0.04	0.36	1.37	2.11	4.01	-0.57	-0.57	4.82	5.13	2.67	1.86	2.13	1.74	0.42	-0.44	0.39	0.52	-0.64			
C3B3	-3.74	-3.21	-0.68	0.23	0.52	2.53	-3.85	-3.85	3.76	4.05	1.34	0.46	0.67	0.32	-1.12	-2.14	-0.93	-2.2	-3.91	-3		
C4	4.29	13.45	0.68	1.88	3.35	7.09	0.53	0.36	6.7	8.4	3.72	2.71	3.16	2.57	0.94	-0.09	1.07	1.85	-1.22	0.58	3.84	
L	12.92	12.98	14.27	14.38	13.19	13.03	12.94	12.94	12.78	12.88	12.67	12.64	12.7	12.64	12.62	12.66	12.65	12.87	12.94	12.76	12.85	12.94

## **APPENDIX B**

### **Stated Preference Output Absolute Cost Models**



**Table 1: Overall Sample Analysis Using Absolute Cost**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.0198	-19.08	-
Journey time to airport (min)	-0.0095	-23.42	£0.48
Airline on time performance (percentage points)	0.0169	19.74	£0.85
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	0.2760	3.91	£13.94
Baggage allowance level 3	0.3240	4.89	£16.36
Baggage allowance level 4	0.2767	7.13	£13.98
On-line check-in not available	Base	-	-
On-line check-in available	0.2691	10.41	£13.59
Security queuing times (min)	-0.0102	-10.89	£0.51
Lost bags per 1,000 pax	-0.0114	-9.64	£0.58
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.3097	9.76	£15.64
Government Tax refunded upon self cancellation without admin fee	0.2455	10.81	£12.40
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	0.0563	1.83	-
Environmental Impact of Flying E	0.1685	5.1	£8.51
Environmental Impact of Flying D	0.1422	4.41	£7.18
Environmental Impact of Flying C	0.2197	6.37	£11.10
Environmental Impact of Flying B	0.2294	6.44	£11.59
Environmental Impact of Flying A = lowest impact	0.2238	6.51	£11.31
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.1384	7.34	£6.99
Number of shops (>30)	0.0648	6.51	£3.27
Walking distance at airport (min)	-0.0078	-9.94	£0.39
On-board service level 1	Base	-	-
On-board service level 2	0.0073	0.5	-
On-board service level 3	0.0744	6.85	£3.76
Check-in queues (min)	-0.0056	-12.12	£0.28

**Table 2: Absolute Cost: Domestic Full Service Business/Premium Economy**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.00139	-0.31	-
Journey time to airport (min)	-0.0003	-1.62	-
Airline on time performance (percentage points)	0.0020	4.53	-
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	-0.0144	-0.4	-
Baggage allowance level 3	0.0078	0.24	-
Baggage allowance level 4	-0.0219	-1.08	-
On-line check-in not available	Base	-	-
On-line check-in available	0.0230	1.64	-
Security queuing times (min)	-0.0008	-0.31	-
Lost bags per 1,000 pax	-0.0006	-0.3	-
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.0237	0.31	-
Government Tax refunded upon self cancellation without admin fee	0.0071	0.3	-
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	-0.0231	-0.3	-
Environmental Impact of Flying E	0.0031	0.2	-
Environmental Impact of Flying D	0.0018	0.12	-
Environmental Impact of Flying C	0.0001	0	-
Environmental Impact of Flying B	0.0035	0.2	-
Environmental Impact of Flying A = lowest impact	0.0122	0.29	-
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.0317	0.29	-
Number of shops (>30)	0.0003	0.02	-
Walking distance at airport (min)	-0.0003	-0.21	-
On-board service level 1	Base	-	-
On-board service level 2	0.0207	0.28	-
On-board service level 3	-0.0160	-0.29	-
Check-in queues (min)	-0.0014	-0.31	-

**Table 3: Absolute Cost: Domestic Full Service Economy**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.0306	-3.63	-
Journey time to airport (min)	-0.0094	-7.24	£0.31
Airline on time performance (percentage points)	0.0141	5.66	£0.46
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	-0.3313	-1.68	-
Baggage allowance level 3	-0.2213	-1.22	-
Baggage allowance level 4	0.2115	1.94	-
On-line check-in not available	Base	-	-
On-line check-in available	0.2495	3.27	£8.15
Security queuing times (min)	-0.0168	-3.13	£0.55
Lost bags per 1,000 pax	-0.0046	-1.61	-
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.2806	2.52	£9.17
Government Tax refunded upon self cancellation without admin fee	0.2544	3.01	£8.31
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	0.0021	0.02	-
Environmental Impact of Flying E	0.1501	1.64	-
Environmental Impact of Flying D	0.1941	1.84	-
Environmental Impact of Flying C	0.3088	2.3	£10.09
Environmental Impact of Flying B	0.1193	1.31	-
Environmental Impact of Flying A = lowest impact	0.0964	1.16	-
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.0889	1.24	-
Number of shops (>30)	0.1024	2.15	£3.35
Walking distance at airport (min)	-0.0051	-2.1	£0.17
On-board service level 1	Base	-	-
On-board service level 2	0.0098	0.17	-
On-board service level 3	0.0064	0.14	-
Check-in queues (min)	-0.0106	-3.03	£0.35

**Table 4: Absolute Cost: Domestic NFC/Charter**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.068	-7.76	-
Journey time to airport (min)	-0.0137	-10.69	£0.20
Airline on time performance (percentage points)	0.0200	7.55	£0.29
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	-0.1514	-0.76	-
Baggage allowance level 3	-0.1177	-0.64	-
Baggage allowance level 4	0.0980	0.92	-
On-line check-in not available	Base	-	-
On-line check-in available	0.4306	5.63	£6.33
Security queuing times (min)	-0.0126	-4.96	£0.18
Lost bags per 1,000 pax	-0.0131	-4.31	£0.19
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.2862	3.9	£4.21
Government Tax refunded upon self cancellation without admin fee	0.2011	4.13	£2.96
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	0.1185	1.4	-
Environmental Impact of Flying E	0.1734	2.19	£2.55
Environmental Impact of Flying D	0.1344	1.72	-
Environmental Impact of Flying C	0.1898	2.18	£2.79
Environmental Impact of Flying B	0.2544	2.9	£3.74
Environmental Impact of Flying A = lowest impact	0.1467	1.88	-
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.2918	3.1	£4.29
Number of shops (>30)	0.0868	2.11	£1.28
Walking distance at airport (min)	-0.0126	-3.99	£0.19
On-board service level 1	Base	-	-
On-board service level 2	-0.0445	-0.7	-
On-board service level 3	0.0518	1.12	-
Check-in queues (min)	-0.0114	-5.44	£0.17

**Table 5: Absolute Cost: Short/Mid Haul Full Service Business/Premium Economy**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.00495	-4.3	-
Journey time to airport (min)	-0.0032	-2.22	£0.65
Airline on time performance (percentage points)	0.0131	3.78	£2.65
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	0.3295	1.17	-
Baggage allowance level 3	0.1679	0.62	-
Baggage allowance level 4	-0.0041	-0.03	-
On-line check-in not available	Base	-	-
On-line check-in available	0.1338	1.32	-
Security queuing times (min)	-0.0039	-1.12	-
Lost bags per 1,000 pax	-0.0113	-1.78	-
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.4132	1.92	-
Government Tax refunded upon self cancellation without admin fee	0.2428	1.92	-
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	-0.0847	-0.56	-
Environmental Impact of Flying E	0.3144	1.54	-
Environmental Impact of Flying D	0.3968	1.76	-
Environmental Impact of Flying C	0.3321	1.63	-
Environmental Impact of Flying B	0.4150	1.75	-
Environmental Impact of Flying A = lowest impact	0.4282	1.84	-
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.0216	0.24	-
Number of shops (>30)	0.1211	1.89	-
Walking distance at airport (min)	-0.0085	-1.99	£1.72
On-board service level 1	Base	-	-
On-board service level 2	0.0911	1.01	-
On-board service level 3	0.1235	1.9	-
Check-in queues (min)	-0.0069	-2.79	£1.39

**Table 6: Absolute Cost: Short/Mid Haul Full Service Economy**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.0357	-10.83	-
Journey time to airport (min)	-0.0089	-11.11	£0.25
Airline on time performance (percentage points)	0.0171	10.57	£0.48
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	-0.0920	-0.67	-
Baggage allowance level 3	0.0275	0.22	-
Baggage allowance level 4	0.1428	1.97	£4.00
On-line check-in not available	Base	-	-
On-line check-in available	0.2389	4.69	£6.69
Security queuing times (min)	-0.0102	-6.86	£0.28
Lost bags per 1,000 pax	-0.0092	-5.29	£0.26
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.2359	4.94	£6.61
Government Tax refunded upon self cancellation without admin fee	0.2209	6.51	£6.19
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	0.0517	1.05	-
Environmental Impact of Flying E	0.1636	3.02	£4.58
Environmental Impact of Flying D	0.1158	2.14	£3.24
Environmental Impact of Flying C	0.1874	3.44	£5.25
Environmental Impact of Flying B	0.1821	3.02	£5.10
Environmental Impact of Flying A = lowest impact	0.2366	4.11	£6.63
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.0795	1.44	-
Number of shops (>30)	0.1086	3.39	£3.04
Walking distance at airport (min)	-0.0109	-5.16	£0.30
On-board service level 1	Base	-	-
On-board service level 2	-0.0799	-1.63	-
On-board service level 3	0.0498	1.51	-
Check-in queues (min)	-0.0101	-7.8	£0.28

**Table 7: Absolute Cost: Short/Mid Haul NFC/Charter**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.0456	-9.71	-
Journey time to airport (min)	-0.0095	-12.53	£0.21
Airline on time performance (percentage points)	0.0158	11.09	£0.35
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	0.3250	2.58	£7.13
Baggage allowance level 3	0.2861	2.51	£6.27
Baggage allowance level 4	0.3188	4.62	£6.99
On-line check-in not available	Base	-	-
On-line check-in available	0.2896	6.28	£6.35
Security queuing times (min)	-0.0086	-6.3	£0.19
Lost bags per 1,000 pax	-0.0122	-6.2	£0.27
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.2697	5.76	£5.91
Government Tax refunded upon self cancellation without admin fee	0.2485	6.79	£5.45
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	0.1066	2.21	£2.34
Environmental Impact of Flying E	0.2318	4.11	£5.08
Environmental Impact of Flying D	0.1515	3.04	£3.32
Environmental Impact of Flying C	0.2636	4.56	£5.78
Environmental Impact of Flying B	0.2591	4.42	£5.68
Environmental Impact of Flying A = lowest impact	0.2551	4.53	£5.59
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.0935	2.42	£2.05
Number of shops (>30)	0.0406	2.16	£0.89
Walking distance at airport (min)	-0.0106	-6.35	£0.23
On-board service level 1	Base	-	-
On-board service level 2	0.0249	0.84	-
On-board service level 3	0.0961	4.09	£2.11
Check-in queues (min)	-0.0080	-7.61	£0.17

**Table 8: Absolute Cost: Long Haul Full Service Business/Premium Economy**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.00682	-7.3	-
Journey time to airport (min)	-0.0089	-4.15	£1.30
Airline on time performance (percentage points)	0.0142	2.87	£2.09
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	0.0959	0.24	-
Baggage allowance level 3	0.0206	0.05	-
Baggage allowance level 4	0.0792	0.36	-
On-line check-in not available	Base	-	-
On-line check-in available	0.5973	3.89	£87.58
Security queuing times (min)	-0.0180	-2.24	£2.64
Lost bags per 1,000 pax	-0.0225	-2.11	£3.29
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.9478	2.9	£138.97
Government Tax refunded upon self cancellation without admin fee	0.8881	3.45	£130.22
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	0.2784	0.88	-
Environmental Impact of Flying E	0.3658	1.06	-
Environmental Impact of Flying D	0.6694	1.77	-
Environmental Impact of Flying C	-0.0430	-0.14	-
Environmental Impact of Flying B	0.1027	0.31	-
Environmental Impact of Flying A = lowest impact	0.3924	1.15	-
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.0639	0.7	-
Number of shops (>30)	0.1104	1.54	-
Walking distance at airport (min)	-0.0087	-1.91	-
On-board service level 1	Base	-	-
On-board service level 2	0.1606	1.35	-
On-board service level 3	0.1950	2.05	£28.59
Check-in queues (min)	-0.0091	-2.46	£1.33



**Table 9: Absolute Cost: Long Haul Full Service Economy**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.0226	-16.55	-
Journey time to airport (min)	-0.0051	-10.49	£0.23
Airline on time performance (percentage points)	0.0086	9.5	£0.38
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	-0.0853	-1.12	-
Baggage allowance level 3	0.0804	1.12	-
Baggage allowance level 4	0.2304	5.35	£10.19
On-line check-in not available	Base	-	-
On-line check-in available	0.2064	7.24	£9.13
Security queuing times (min)	-0.0088	-5.61	£0.39
Lost bags per 1,000 pax	-0.0119	-5.43	£0.53
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.3381	5.72	£14.96
Government Tax refunded upon self cancellation without admin fee	0.2960	7.29	£13.10
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	-0.0322	-0.46	-
Environmental Impact of Flying E	0.0236	0.32	-
Environmental Impact of Flying D	0.1069	1.51	-
Environmental Impact of Flying C	0.1149	1.62	-
Environmental Impact of Flying B	0.2232	3.1	£9.88
Environmental Impact of Flying A = lowest impact	0.1821	2.56	£8.06
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.1598	2.43	£7.07
Number of shops (>30)	0.1031	3.35	£4.56
Walking distance at airport (min)	-0.0122	-6.38	£0.54
On-board service level 1	Base	-	-
On-board service level 2	-0.0258	-0.55	-
On-board service level 3	0.1760	5.35	£7.79
Check-in queues (min)	-0.0064	-6.99	£0.29

**Table 10: Absolute Cost: Access to Environmental Impact – Unimportant**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.0276	-11.16	-
Journey time to airport (min)	-0.0098	-13.6	£0.36
Airline on time performance (percentage points)	0.0168	11.82	£0.61
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	0.3332	2.93	£12.07
Baggage allowance level 3	0.3746	3.6	£13.57
Baggage allowance level 4	0.3610	5.82	£13.08
On-line check-in not available	Base	-	-
On-line check-in available	0.2133	5.05	£7.73
Security queuing times (min)	-0.0072	-7.11	£0.26
Lost bags per 1,000 pax	-0.0076	-6.33	£0.28
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.1707	5.79	£6.19
Government Tax refunded upon self cancellation without admin fee	0.1371	6.52	£4.97
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	0.0687	2.2	£2.49
Environmental Impact of Flying E	0.0923	3	£3.35
Environmental Impact of Flying D	0.0177	0.6	-
Environmental Impact of Flying C	0.0812	2.43	£2.94
Environmental Impact of Flying B	0.0740	2.33	£2.68
Environmental Impact of Flying A = lowest impact	0.0777	2.55	£2.82
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.1578	3.71	£5.72
Number of shops (>30)	0.0907	3.74	£3.28
Walking distance at airport (min)	-0.0113	-5.86	£0.41
On-board service level 1	Base	-	-
On-board service level 2	0.0293	0.84	-
On-board service level 3	0.1180	4.22	£4.27
Check-in queues (min)	-0.0086	-7.5	£0.31

**Table 11: Absolute Cost: Access to Environmental Impact –Important**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.0141	-10.78	-
Journey time to airport (min)	-0.0069	-12.67	£0.49
Airline on time performance (percentage points)	0.0141	11.61	£1.00
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	0.1635	1.68	-
Baggage allowance level 3	0.1698	1.8	-
Baggage allowance level 4	0.1990	3.65	£14.11
On-line check-in not available	Base	-	-
On-line check-in available	0.2516	7.06	£17.84
Security queuing times (min)	-0.0091	-5.15	£0.65
Lost bags per 1,000 pax	-0.0143	-5.33	£1.01
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.3769	5.27	£26.73
Government Tax refunded upon self cancellation without admin fee	0.2951	5.81	£20.93
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	0.0768	1.13	-
Environmental Impact of Flying E	0.3624	4.36	£25.70
Environmental Impact of Flying D	0.3140	4	£22.27
Environmental Impact of Flying C	0.4320	4.86	£30.64
Environmental Impact of Flying B	0.4866	5.13	£34.51
Environmental Impact of Flying A = lowest impact	0.4409	4.9	£31.27
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.0477	5.05	£3.38
Number of shops (>30)	0.0199	4.26	£1.41
Walking distance at airport (min)	-0.0020	-5.64	£0.14
On-board service level 1	Base	-	-
On-board service level 2	-0.0027	-0.43	-
On-board service level 3	0.0211	4.31	£1.49
Check-in queues (min)	-0.0012	-6.5	£0.09

**Table 12: Absolute Cost: Access to Environmental Impact –Neither Important nor Unimportant**

Variable	Factored Coefficient	t-stat	WTP
Cost (£)	-0.0227	-11.11	-
Journey time to airport (min)	-0.0136	-13.81	£0.60
Airline on time performance (percentage points)	0.0221	11.03	£0.97
Baggage allowance level 1	Base	-	-
Baggage allowance level 2	0.3975	2.27	£17.51
Baggage allowance level 3	0.5339	3.36	£23.52
Baggage allowance level 4	0.2842	3.03	£12.52
On-line check-in not available	Base	-	-
On-line check-in available	0.3802	6.01	£16.75
Security queuing times (min)	-0.0146	-6.61	£0.64
Lost bags per 1,000 pax	-0.0146	-5.49	£0.64
No Government Tax refund upon self cancellation	Base	-	-
Government Tax refunded upon self cancellation with admin fee	0.4415	5.78	£19.45
Government Tax refunded upon self cancellation without admin fee	0.3556	6.5	£15.66
Environmental Impact of Flying and G = highest impact	Base	-	-
Environmental Impact of Flying F	0.0241	-0.34	-
Environmental Impact of Flying E	0.0404	0.52	-
Environmental Impact of Flying D	0.1741	2.2	£7.67
Environmental Impact of Flying C	0.1899	2.67	£8.36
Environmental Impact of Flying B	-0.1820	2.29	£8.02
Environmental Impact of Flying A = lowest impact	0.2421	3.05	£10.67
Number of shops (<10)	Base	-	-
Number of shops (10-30)	0.1333	3.14	£5.87
Number of shops (>30)	0.0629	2.76	£2.77
Walking distance at airport (min)	-0.0112	-5.98	£0.49
On-board service level 1	Base	-	-
On-board service level 2	0.0242	0.64	-
On-board service level 3	0.0881	3.31	£3.88
Check-in queues (min)	-0.0091	-7.39	£0.40

# **APPENDIX C**

## **Questionnaire**

**Recruitment**

This research is being undertaken by Accent on behalf of the Civil Aviation Authority (CAA). The CAA is the UK's aviation industry regulator and is using this research to explore how people make air travel choices.

Please be assured that any answers you give will be treated in confidence in accordance with the Code of Conduct of the Market Research Society.

Some people may not be eligible for this survey. The first few questions will check if you are eligible before the main questions are asked.

---

Q1. When was the last time you booked a flight departing from a UK airport?

- Within the last week
- Between 2 weeks and 1 month ago
- Between 1 and 2 months ago
- Between 2 and 3 months ago
- Between 3 and 6 months ago **THANK AND CLOSE**
- Between 6 and 12 months ago **THANK AND CLOSE**
- Longer than 12 months ago **THANK AND CLOSE**
- Have never booked a flight **THANK AND CLOSE**

---

Q2. What was the main purpose of the last flight you booked?

- Business **GO TO Q4**
- Leisure
- Visiting friends and/or relatives
- Other – please type in:

**QUOTAS:**

**CODE 1 (BUSINESS): 400 INTERVIEWS**  
**CODE 2, 3 AND 4 (LEISURE): 1,600 INTERVIEWS**

---

Q3. Was the flight part of a package holiday?

- Yes
- No

---

Q4. Was the last flight you booked for a flight that you were going to be taking (either by yourself or with others – friends or family for example) or was it for someone else?

- For myself
- For someone else **GO TO Q6**

---

Q5. Have you taken this flight?

- Yes
- No

**GO TO Q8**

---

Q6. Who was the flight for? **CODE ALL THAT APPLY**

- A relative
- A friend
- A business colleague
- Other – please type in:

---

Q7. And has this flight been taken?

- Yes
- No
- Don't know

---

Q8. Is this flight domestic or international?

- Domestic (ie: for a flight between two airports in the UK) **GO TO Q9**
- International (ie a flight from a UK airport to an airport outside of the UK)
- Don't know **THANK AND CLOSE**

---

Q8a **IF Q8 = CODE 2 ASK:** What is the approximate flight time to the main destination of your trip from the UK?

- Short haul (ie: for a flight from a UK airport to a destination airport outside the UK with a flight time of between 1 and 3 hours)
- Mid haul (ie: for a flight from a UK airport to a destination airport outside the UK with a flight time of between 4 and 6 hours)
- Long haul (ie: for a flight from a UK airport to a destination airport outside the UK with a flight time of 7 hours or longer)
- None of these **THANK AND CLOSE**

---

Q9. How did you book this flight?

- On the Internet
- By telephone
- At a travel agent
- Other – please type in:

**QUOTAS:**

- CODE 1 (ONLINE BOOKING): 1,200 INTERVIEWS**
- CODE 2 OR CODE 4 (TELEPHONE/OTHER): 400 INTERVIEWS**
- CODE 3 (TRAVEL AGENT): 400 INTERVIEWS**

---

Q10. **DO NOT SHOW IF Q8A = CODE 3 BUT CODE AS FULL SERVICE (IE: CODE 2 AT Q10). IF Q5 = 1 SHOW** “Was the flight taken” **OR IF Q5 = 2 SHOW** “Will the flight be taken” with what some people refer to as a budget/low cost airline (such as EasyJet or Ryanair) or a charter airline (such as Thomson Airways or Thomas Cook) or with what can be called a full service airline (such as British Airways, Virgin Atlantic or KLM)?

- Budget or charter airline **GO TO Q11A**
- Full service airline
- Don't know/I can't remember – the flight was part of a package **THANK AND CLOSE**
- Don't know/I can't remember – the flight was not part of a package **THANK AND CLOSE**

---

Q11. And what cabin class did you book?

Economy  
Premium Economy  
Business Class  
First Class  
Don't know/I can't remember **THANK AND CLOSE**

---

**Q11A DUMMY QUESTION : ASSIGN TO QUOTA**

**QUOTA 1 : DOMESTIC : BUSINESS OR PREMIUM ECONOMY: Q8 = 1 AND Q10 = 2 AND Q11 = 2, 3 OR 4 – 100 INTERVIEWS**

**QUOTA 2 : DOMESTIC : ECONOMY FULL SERVICE: Q8 = 1 AND Q10 = 2 AND Q11 = 1 – 150 INTERVIEWS**

**QUOTA 3 : DOMESTIC : NFC/CHARTER: Q8 = 1 AND Q10 = 1 – 150 INTERVIEWS**

**QUOTA 4 : SHORT HAUL (1 TO 3 HRS): BUSINESS/PREMIUM ECONOMY: Q8A = 1 AND Q10 = 2 AND Q11 = 2, 3 OR 4 – 100 INTERVIEWS**

**QUOTA 5 : SHORT HAUL (1 TO 3 HRS): ECONOMY FULL SERVICE: Q8A = 1 AND Q10 = 2 AND Q11 = 1 – 275 INTERVIEWS**

**QUOTA 6 : SHORT HAUL (1 TO 3 HRS): NFC/CHARTER: Q8A = 1 AND Q10 = 1 – 275 INTERVIEWS**

**QUOTA 7 : MID-HAUL (4 TO 6 HRS): BUSINESS/PREMIUM ECONOMY: Q8A = 2 AND Q10 = 2 AND Q11 = 2, 3 OR 4 – 100 INTERVIEWS**

**QUOTA 8 : MID HAUL (4 TO 6 HRS): ECONOMY FULL SERVICE: Q8A = 2 AND Q10 = 2 AND Q11 = 1 – 225 INTERVIEWS**

**QUOTA 9 : MID HAUL (4 TO 6 HRS): NFC/CHARTER: Q8A = 2 AND Q10 = 1 – 225 INTERVIEWS**

**QUOTA 10 : LONG HAUL (7HRS OR LONGER): BUSINESS/PREMIUM ECONOMY: Q8A = 3 AND Q10 = 2 AND Q11 = 2, 3 OR 4 – 100 INTERVIEWS**

**QUOTA 11: LONG HAUL (7HRS OR LONGER) : ECONOMY FULL SERVICE: Q8A = 3 AND Q10 = 2 AND Q11 = 1 – 300 INTERVIEWS**

### Main Questionnaire

Thank you.

The questionnaire will take about 20 minutes. Please click on the appropriate answer to each question or type in your answer where required. The counter at the top of the screen will show you how much more of the questionnaire is remaining. If you wish to exit the questionnaire you can do so and go back into it at the same point later on.

You do not have to answer questions you do not wish to and you can terminate the interview at any point.

We would like to start by asking you a little bit more about the last flight that you booked. We would then like you to undertake a series of exercises where we'll ask you to make choices between scenarios that could be available when booking future flights.

### The Last Flight You Booked

Q12. Thinking back to the last flight you booked, from which UK airport **IF Q5 OR Q7 = 1 OR 3 SHOW "did" OR IF Q5 OR Q7 = 2 SHOW "will"**# this flight depart?  
**PULL DOWN LIST SHOWING ALL UK AIRPORTS**

Aberdeen  
Belfast City  
Birmingham  
Bristol  
East Midlands  
Edinburgh



Gatwick  
Glasgow  
Heathrow  
Liverpool  
London City  
Luton  
Manchester  
Newcastle  
Stansted  
Other – please type in:

---

Q13. Did you consider any other departure airports when booking this flight?

Yes  
No **GO TO Q16**

---

Q14. And why did you decide to use **Q12**?  
**PLEASE TICK ALL RESPONSES THAT WERE RELATED TO YOUR DECISION TO USE Q12**

Cost and convenience of getting to airport  
Availability of flight route  
Airport facilities  
Cheapest flight available  
Other – please type in:

---

Q15. And what was the main reason for using **Q12**?  
**SINGLE CODE**  
**SHOW ONLY RESPONSES FROM Q14**

Cost and convenience of getting to airport  
Availability of flight route  
Airport facilities  
Cheapest flight available  
Other – please type in:

---

Q16. **IF Q5 OR Q7 = 1 OR 3 SHOW “Was the flight direct or did it involve changes” OR IF Q5 OR Q7 = 2 SHOW “Will the flight be direct or will it involve changes”#?** Please note that if you took a multiple destination trip this refers to the journey to your first stopover

Direct  
Involved changes

---

Q17. And what **#IF Q5 OR Q7 = 1 OR 3 SHOW “was” OR IF Q5 OR Q7 = 2 SHOW “is”#** was the destination airport? If the trip **#IF Q5 OR Q7 = 1 OR 3 SHOW “involved” OR IF Q5 OR Q7 = 2 SHOW “involves”#** stops in a number of places please type in the first place that you stayed.

**PLEASE TYPE IN CITY:**  
**PLEASE TYPE IN NAME OF AIRPORT:**

---

Q18. Did you consider any other airports at or near the same destination when booking this flight?

Yes  
No **GO TO 20**

---

Q19b What were the reasons for using **Q17**?  
**MULTICODE**

Cost of getting from the airport

Availability of flight route  
Airport facilities  
Cheapest flight available  
Other – please type in:

---

Q19. And what was the main reason for using Q17?  
**SINGLE CODE (ONLY PERMIT CODES USED AT Q19B)**

Cost of getting from the airport  
Availability of flight route  
Airport facilities  
Cheapest flight available  
Other – please type in:

---

Q20. Did you book a return ticket, multi-destination trip ticket or a one way ticket?"

Return  
Multi-destination trip  
One way  
Don't know/not sure

---

Q21. **IF CODE 3 AT Q20 SHOW:** Which airline #if Q5 or Q7 = 1 or 3 show "did" or if Q5 or Q7 = 2 show "will"# you fly with?

**IF CODE 1, 2 OR 4 AT Q20 SHOW:** Which airlines #if Q5 or Q7 = 1 or 3 show "did" or if Q5 or Q7 = 2 show "will"# you fly with?

**PULL DOWN LIST SHOWING ALL AIRLINES**

**SINGLE CODE IF CODE 3 AT Q20**

**MULTI CODE IF CODE 1, 2 OR 4 AT Q20**

Aer Lingus  
Air Canada  
American Airlines  
BMI British Midland  
British Airways  
Continental  
EasyJet  
Emirates  
Flybe  
Jet2.com  
KLM  
Lufthansa  
Monarch  
Ryanair  
SAS  
Swiss Airlines  
Thomas Cook  
Thomson airways  
Virgin Atlantic  
Wizz Air  
Other – please type in:

---

Q22. **IF Q9=3 GO TO NEXT SECTION**

Did you book your flight directly with the airline (by telephone)/(on the internet)?

Yes  
No

**ROTATE SP SECTIONS AIRPORT CHOICE/AIRLINE SERVICE QUALITY/PASSENGER RIGHTS & ENVIRONMENT/PRICING**

## Airport and Airline Exercises

We'd now like to take you through a series of four exercises where we'll be asking you to make choices between different criteria that relate to airport choice and airline information. These will cover aspects of a fictional flight **#IF QUOTA 1 SHOW** “between two UK airports travelling in Business Class with a full service airline”, **IF QUOTA 2 SHOW** “between two UK airports travelling in Economy Class with a full service airline”, **IF QUOTA 3 SHOW** “between two UK airports travelling with a budget/low cost airline”, **IF QUOTA 4 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) in Business Class”, **IF QUOTA 5 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) in Economy Class”, **IF QUOTA 6 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) with a budget/low cost airline”, **IF QUOTA 7 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) in Business Class”, **IF QUOTA 8 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) in Economy Class”, **IF QUOTA 9 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) with a budget/low cost airline”, **IF QUOTA 10 SHOW** “from a UK airport to a location with a flight time of 7 hours or longer (for example Vancouver, Dubai, Delhi or New York) in Business Class”, **IF QUOTA 11 SHOW** “from a UK airport to a location with a flight time of 7 hours or longer (for example Vancouver, Dubai, Delhi or New York) in Economy Class”#. When making your choices please assume that all other aspects of the journey which are not mentioned are the same].

For each exercise we will show you four different sets of flight choices where these criteria will vary. When making your choices please assume that all other aspects of the journey which are not mentioned are the same. The cost of the flight will also be shown. This will be for a return ticket and will include all taxes.

If you want to see further details about any of the criteria in the table you can use the information or "hover" button under the relevant heading.

## Airport/Airline Exercise

In this exercise the different flight options we'll show you will consist of the following factors:

- Journey time to the departure airport
- Airline punctuality
- Baggage allowance
- On-line check-in
- Ticket cost

We will show you four different sets of flight choices where the options will vary. We will ask you to select which of the flights you would have chosen for the fictional flight **#IF QUOTA 1 SHOW** “between two UK airports travelling in Business Class with a full service airline”, **IF QUOTA 2 SHOW** “between two UK airports travelling in Economy Class with a full service airline”, **IF QUOTA 3 SHOW** “between two UK airports travelling with a budget/low cost airline”, **IF QUOTA 4 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) in Business Class”, **IF QUOTA 5 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) in Economy Class”, **IF QUOTA 6 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris,

Amsterdam or Barcelona) with a budget/low cost airline”, **IF QUOTA 7 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) in Business Class”, **IF QUOTA 8 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) in Economy Class”, **IF QUOTA 9 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) with a budget/low cost airline”, **IF QUOTA 10 SHOW** “from a UK airport to a location with a flight time of 7 hours or longer (for example Vancouver, Dubai, Delhi or New York) in Business Class”, **IF QUOTA 11 SHOW** “from a UK airport to a location with a flight time of 7 hours or longer (for example Vancouver, Dubai, Delhi or New York) in Economy Class”#. When making your choices please assume that all other aspects of the journey which are not mentioned are the same.

---

Q23. SP choice set 1

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Q24. SP choice set 2

---

Q25. SP choice set 3

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Q26. SP choice set 4

### **Airport/Airline Exercise**

In this exercise the different flight options we’ll show you will consist of the following factors:

- Security queues at the departure airport
- Luggage delivery
- Cancellation policy
- Environment impact of flying
- Ticket cost

We will show you four different sets of flight choices where the options will vary. We will ask you to select which of the flights you would have chosen for the fictional flight **#IF QUOTA 1 SHOW** “between two UK airports travelling in Business Class with a full service airline”, **IF QUOTA 2 SHOW** “between two UK airports travelling in Economy Class with a full service airline”, **IF QUOTA 3 SHOW** “between two UK airports travelling with a budget/low cost airline”, **IF QUOTA 4 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) in Business Class”, **IF QUOTA 5 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) in Economy Class”, **IF QUOTA 6 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) with a budget/low cost airline”, **IF QUOTA 7 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) in Business Class”, **IF QUOTA 8 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) in Economy Class”, **IF QUOTA 9 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) with a budget/low cost airline”, **IF QUOTA 10 SHOW** “from a UK airport to a location with a flight time of 7 hours or longer (for example Vancouver, Dubai, Delhi or New York) in Business Class”, **IF QUOTA 11 SHOW** “from a UK airport to a location with a flight time of 7 hours or longer (for example Vancouver, Dubai, Delhi or New York) in Economy Class”#. When making your choices please assume that all other aspects of the journey which are not mentioned are the same

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Q27. SP choice set 5

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Q28. SP choice set 6

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Q29. SP choice set 7

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Q30. SP choice set 8

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### **Airport/Airline Exercise**

In this exercise the different flight options we'll show you will consist of the following factors:

- Shopping facilities at the departure airport
- Walking distance at the departure airport
- On-board service during the flight
- Check-in queues at the departure airport
- Ticket cost

We will show you four different sets of flight choices where the options will vary. We will ask you to select which of the flights you would have chosen for the fictional flight **#IF QUOTA 1 SHOW** “between two UK airports travelling in Business Class with a full service airline”, **IF QUOTA 2 SHOW** “between two UK airports travelling in Economy Class with a full service airline”, **IF QUOTA 3 SHOW** “between two UK airports travelling with a budget/low cost airline”, **IF QUOTA 4 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) in Business Class”, **IF QUOTA 5 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) in Economy Class”, **IF QUOTA 6 SHOW** “from a UK airport to a European location with a flight time of between 1 and 3 hours (for example Paris, Amsterdam or Barcelona) with a budget/low cost airline”, **IF QUOTA 7 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) in Business Class”, **IF QUOTA 8 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) in Economy Class”, **IF QUOTA 9 SHOW** “from a UK airport to a location with a flight time of between 4 and 6 hours (for example Sharm-el-Sheik, Athens, Bodrum or Larnaca) with a budget/low cost airline”, **IF QUOTA 10 SHOW** “from a UK airport to a location with a flight time of 7 hours or longer (for example Vancouver, Dubai, Delhi or New York) in Business Class”, **IF QUOTA 11 SHOW** “from a UK airport to a location with a flight time of 7 hours or longer (for example Vancouver, Dubai, Delhi or New York) in Economy Class”#. When making your choices please assume that all other aspects of the journey which are not mentioned are the same

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Q31. SP choice set 9

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Q32. SP choice set 10

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Q33. SP choice set 11

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Q34. SP choice set 12

---

### **Airport Choice, Airline Service Quality, Environment and Cost**

The final exercise brings together all of the different aspects covered in the previous exercises covering:

- Journey time to the departure airport
- Airline punctuality

- Baggage allowance
- On-line check-in
- Security queues at the departure airport
- Luggage delivery
- Cancellation policy
- Environmental impact of flying
- Shopping facilities at the departure airport
- Walking distance at the departure airport
- On-board service during the flight
- Check-in queues at the departure airport
- Ticket cost

This time we'll be showing you five different sets of choices where the options will vary. Please take time to consider the different options shown.

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Q35. SP choice set 13

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Q36. SP choice set 14

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Q37. SP choice set 15

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Q38. SP choice set 16

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Q39. SP choice set 17

### Access to Passenger Rights Information

Q45a When booking flights how important is it for you to have access to information about how the airline will carry out its duty to look after you if your flight is delayed or cancelled?

- Very important
- Quite important
- Neither important nor unimportant
- Not very important
- Not at all important
- Don't know

---

Q45b Where would you most like to find out about information relating to the airline's policy on your rights to refreshments and hotel accommodation in the event of delayed or cancelled flights?

**MULTICODE**

- Online at the time of booking
- Leaflets in the seat back of the airplane seat
- Posters at airports
- Dedicated website
- Page on the airline's website
- Leaflets available to receive through the post
- Leaflet provided at the airport when the delay happens
- Other – please type in:

---

Q45c When booking flights how important is it for you to have access to information relating to the airline's policy on compensation for lost bags?

Very important  
Quite important  
Neither important nor unimportant  
Not very important  
Not at all important  
Don't know

---

Q45d Where would you most like to find out about information relating to the airline's policy on compensation for lost bags?

**MULTICODE**

Online at the time of booking  
Leaflets in the seat back of the airplane seat  
Posters at airports  
Dedicated website  
Page on the airline's website  
Leaflets available to receive through the post  
Leaflet provided at airport if bag is lost  
Other – please type in:

---

Q45e When booking flights how important is it for you to have access to information relating to the environmental impact of the flight you are booking?

Very important  
Quite important  
Neither important nor unimportant  
Not very important  
Not at all important  
Don't know

---

Q45f Where would you most like to find out about information relating to the environmental impact of the flight you are booking?

**MULTICODE**

Online at the time of booking  
Leaflets in the seat back of the airplane seat  
Posters at airports  
Dedicated website  
Page on the airline's website  
Leaflets available to receive through the post  
Other – please type in:

**Historical booking**

Q40. How many flights have you booked in the last 12 months?

**PLEASE COUNT RETURN FLIGHTS AS TWO**

**NUMERICAL FIELD**

None **GO TO Q42**

---

Q41. You mentioned that you booked the flight between Q12 and Q17 by Q9. Is this the way you usually book flights?

Yes **GO TO Q42**  
No

---

Q47a Why did you book the flight in this way?

Write in:

---

**Q42. ASK IF CODE 2 AT Q9 AND CODE 1 AT Q41. OTHERS GO TO Q43.** Why did you book this flight over the telephone?

**PLEASE TICK ALL THAT RELATE TO YOU DECISION TO USE A TRAVEL AGENT**

I prefer the reassurance of talking to someone before making my decision

I don't like paying on the Internet

I find the pricing too complicated on the Internet

Other – please type in:

---

**Q43. ASK IF CODE 3 AT Q9 AND CODE 1 AT Q41. OTHERS GO TO ABOUT YOU.** Why did you book this flight at a travel agent?

**PLEASE TICK ALL THAT RELATE TO YOU DECISION TO USE A TRAVEL AGENT**

I prefer the reassurance of talking to someone before making my decision

I don't like paying on the Internet

I find the pricing too complicated on the Internet

Other – please type in:

### **About you**

Finally, some questions about yourself. The personal information you provide during this survey will be kept confidential by Accent and will not be disclosed to third parties. It will be used for analysis purposes only.

---

**Q44.** Are you the chief income earner in your household?

Yes

No

Don't know

---

**Q45.** Which of these is closest to the occupation of the chief wage earner in your household? If you are not the chief income earner please give the occupation of the chief wage earner.

Professional/Senior Managerial

Middle Managerial

Junior Managerial/Clerical/Supervisory

Skilled Manual (With professional qualifications/served an apprenticeship)

Unskilled Manual (No qualifications/not served an apprenticeship)

Full time student

Retired

Unemployed/Between jobs

Housewife/Househusband

Don't know

---

**Q46.** Is the chief income earner in your household self employed?

Yes

No

Don't know

---

**Q47.** What is your total annual household income, before tax and other deductions? If you don't know, please give your best estimate.

Up to £5,750

£5,750 - £11,499

£11,500-£14,499

£14,500-£17,249

£17,250-£28,749



£28,750-£40,249  
£40,250-£45,999  
£46,000-£80,499  
£80,500-£114,999  
£115,000 and over  
Prefer not to say

---

Q48. Which of the following age groups are you in?

16-24  
25-34  
35-44  
45-54  
55-59  
60-64  
65-74  
75 and over  
Prefer not to say

---

Q54a To which of these ethnic groups do you consider that you belong?

Asian  
Black  
White  
Other  
Prefer not to say

---

Q54b Do you have a disability or impairment that makes accessing and/or using an airport or flying difficult?

Yes  
No  
Prefer not to say

---

Q54c When booking flights how important is it for you to have access to information about rights for passengers with a disability or reduced mobility to receive assistance when taking a flight?

Very important  
Quite important  
Neither important nor unimportant  
Not very important  
Not at all important  
Don't know

---

Q54d Where would you most like to find out about information about rights for passengers with a disability or reduced mobility to receive assistance when taking a flight? **MULTICODE**

Online at the time of booking  
Leaflets in the seat back of the airplane seat  
Posters at airports  
Dedicated website  
Page on the airline's website  
Leaflets available to receive through the post  
Other (please type in)

---

Q49. Are you .....

Male  
Female

---

**Q55b** How many adults (ie those aged 16 or over) usually reside at your home address? **SINGLE CODE**

one  
two  
three  
four  
five  
six  
more than six  
Prefer not to say

---

**Q50.** How many children (ie those aged under 16) usually reside at your home address?  
**SINGLE CODE**

None  
one  
two  
three  
four  
five  
six  
more than six  
Prefer not to say

---

**Q51.** How many cars are there in your household?

None  
1  
2  
3 or more  
Prefer not to say

**Thank you for your help in this research**

This research was conducted under the terms of the MRS code of conduct and is completely confidential.

If you would like any further information about the CAA and the work they do please visit:  
[www.caa.co.uk](http://www.caa.co.uk)

# **APPENDIX D**

## **Respondent Demographics**

**Note: the following tables show the weighted data**

**Table 13: Occupation of chief income earner**

	Total %
Professional/Senior Managerial	22
Middle Managerial	20
Junior Managerial/Clerical/Supervisory	18
Skilled Manual (With professional qualifications/served an apprenticeship)	15
Unskilled Manual (No qualifications/not served an apprenticeship)	5
Full time student	2
Retired	15
Unemployed/Between jobs	2
Housewife/Househusband	1
Don't know	1
<b>Base</b>	<b>2,226</b>

**Table 14: Self-employment**

	Total %
No	20
Yes	79
Don't know	1
<b>Base</b>	<b>2,226</b>

**Table 15: Annual household income**

	Total %
Up to £5,750	1
£5,750 - £11,499	4
£11,500-£14,499	4
£14,500-£17,249	4
£17,250-£28,749	14
£28,750-£40,249	22
£40,250-£45,999	9
£46,000-£80,499	19
£80,500-£114,999	6
£115,000 and over	3
Prefer not to say	12
<b>Base</b>	<b>2,226</b>

**Table 16: Age**

	Total %
16-24	7
25-34	21
35-44	19
45-54	21
55-59	12
60-64	9
65-74	9
75 and over	2
Prefer not to say	1
<b>Base</b>	<b>2,226</b>

**Table 17: Ethnic group**

	Total %
Asian	5
Black	2
White	90
Other	1
Prefer not to say	1
<b>Base</b>	<b>2,226</b>

**Table 18: Gender**

	Total %
Female	53
Male	47
<b>Base</b>	<b>2,226</b>

**Table 19: Number of adults usually resident in the household**

	Total %
One	16
Two	58
Three	15
Four	8
Five	2
Six	0
More than six	0
Prefer not to say	1
<b>Base</b>	<b>2,226</b>

**Table 20: Number of children usually resident in the household**

	Total %
None	70
One	16
Two	10
Three	3
Four	1
Five	0
Six	0
More than six	0
Prefer not to say	1
<b>Base</b>	<b>2,226</b>

**Table 21: Number of cars in household**

	Total %
None	10
1	45
2	36
3 or more	9
Prefer not to say	1
<b>Base</b>	<b>2,226</b>

**Appendix E**  
**Destination Airport**

The stated destination airports are as follows (shown here as number of respondents mentioning):

<b>Destination Airport</b>	<b>Number of respondents</b>
Aberdeen	13
Abu Dhabi International	2
Adelaide	2
Agadir Al Massira	4
Alicante	72
Allama Iqbal International	1
Almeria	3
Amsterdam Airport Schiphol	48
Antalya	10
Ataturk international	10
Athens International	9
Atlanta (not specified)	3
Auckland	7
Bahrain International	4
Bandaranaike International	6
Barcelona	19
Beijing Capital International	5
Beirut Rafic Hariri International Airport	2
Belfast (not specified)	2
Belfast City	13
Belfast International	11
Ben Gurion International	10
Berlin Schonefeld	2
Berlin Tegel (Tegel)	3
Birmingham	13
Bologna	5
Bordeaux-Mérignac	2
Bremen	5
Brisbane	3
Bristol	4
Brussels	7
Bucharest (not specified)	3
Budapest Franz Listz International	7
Burgas (Bourgas) International	4
Cairns	1
Cairo International	6
Calgary International	4
Cancun International	7
Cape Town International	9
Cardiff	3
Catania-Fontanarossa	1
Changi International (Singapore)	16
Chhatrapati Shivaji International (Mumbai)	12
Chicago O'Hare International	4
Cologne/Bonn Airport	4
Copenhagen	17
Corfu International	15
Cork	2
Cyprus (not specified)	3
Dabolim (Goa)	6
Dalaman (Marmaris)	27
Denver International	2
Doha International	4
Dubai International	29
Dublin	27
Dusseldorf International	12

East Midlands	5
Edinburgh	29
Enfidha-Hammamet International	5
Entebbe International Airport	2
EuroAirport Basel-Mulhouse-Freiburg	2
Exeter	3
Faro	39
Findel Airport (Luxembourg)	2
Florida (not specified)	1
Frank País Airport (Holguín)	2
Frankfurt (not specified)	8
Frankfurt am Main	3
Frankfurt-Hahn	2
Fuerteventura	15
Funchal (Madeira)	8
Galileo Galilei International	6
Gdansk Lech Walesa	5
General Edward Lawrence Logan International (Boston)	6
Geneva International	27
Gibraltar	2
Girona-Costa Brava	13
Glasgow International	26
Gran Canaria (Las Palmas)	24
Grantley Adams International (Barbados)	13
Gregorio Luperón International (Puerto Plata)	3
Grenoble-Isère Airport	5
Guernsey	6
Hamburg	5
Hanover-Langenhagen	2
Harare International	3
Hartsfield-Jackson Atlanta International	2
Havana (Jose Marti International)	5
Henri Coanda International Airport (Bucharest)	2
Heraklion International (Crete)	6
Hong Kong International	22
Honolulu International	2
Houston (George Bush Intercontinental airport)	5
Hurghada International	2
Ibiza	10
Indira Gandhi International (Delhi)	14
Innsbruck Kranebitten	5
Inverness	3
Ireland West airport Knock	3
Islamabad International	3
Izmir Adnan Menderes International	3
Jersey	7
JFK International	27
Johannesburg International (OR Tambo)	5
Jomo Kenyatta International (Nairobi)	7
Juan Gualberto Gomez (Varadero)	2
Katowice International	5
King Shaka International (Durban)	3
Kingsford-Smith (Sydney)	6
Kos Island International	9
Kotoka International (Accra)	1
Krakow-Balice	10
Kuala Lumpur International	7
La Palma Airport	4
Lanzarote (Arrecife)	35
Larnaca International	9



Leeds Bradford international	6
Lennart Meri Tallinn (Tallinn)	4
Leonardo da Vinci-Fiumicino	13
Linate	3
Lisbon Portela	13
Liverpool John Lennon	5
Lodz-Lublinek (Lodz Wladyslaw Reymont airport)	4
London (not specified)	8
London City	7
London Gatwick	27
London Heathrow	56
London Luton	15
London Stansted	13
Los Angeles International	6
Lungi International	2
Luxor International	4
Madrid (not specified)	6
Madrid-Barajas	6
Malaga	75
Male International	3
Malta International	26
Manchester	18
Marrakech-Menara	3
McCarran International (Las Vegas)	11
Melbourne	6
Menorca (Mahon)	9
Miami International	15
Milan (not specified)	4
Milan-Bergamo	2
Milano Malpensa	6
Milas-Bodrum	4
Mombasa	3
Monastir-Habib Bourguiba International	4
Montreal (not specified)	2
Moscow Domodedovo	1
Munich	17
Murcia-San Javier (Murcia)	15
Murtala Muhammed International	1
Muscat International	2
Naples International (Italy)	5
Naples Municipal (US)	1
Narita International	1
New York (not specified)	4
Newark Liberty International	20
Newcastle International	8
Nice Cote d'Azur (Nice)	14
Norwich International	1
Orlando (not specified)	8
Orlando International	18
Orlando-Sanford International	12
Oslo Airport (Gardermoen)	3
Paderborn Lippstadt	3
Palma de Mallorca (Majorca)	31
Paphos International	21
Paris (not specified)	4
Paris-Charles De Gaulle	28
Perth	8
Philadelphia International	6
Prague Ruzyne International	22
Queen Alia International	1

Reus	6
Reykjavik	3
Rhodes International (Diagoras)	16
Riga International	5
Rome (not specified)	5
Rome Ciampino	5
Saint Lucia (not specified)	2
Salzburg	6
San Diego International	2
San Francisco International	9
Sangster International (Montego Bay)	4
Seville	7
Shahjalal International	1
Shannon	3
Sharm el-Sheikh International	21
Sheremetyevo International	1
Sir Seewoosagur Ramgoolam International (Mauritius)	3
Sofia	9
Southampton	6
Stockholm-Arlanda	5
Stuttgart	2
Suvarnabhumi (New Bangkok International)	22
Tenerife (not specified)	29
Tenerife North	4
Tenerife South (Reina Sofia)	42
Thessaloniki International	5
Toronto Pearson International	4
Toulouse-Blagnac (Toulouse)	7
Treviso Airport (Venice)	2
Valencia	5
Vancouver International	7
Venice (not specified)	3
Venice Marco Polo	5
Verona	5
Vienna International	7
Warsaw Frederic Chopin	8
Washington Dulles International	3
Zakynthos International	8
Zurich	10
Can't remember/don't know/not stated	264
Base	2,226

# **Appendix F**

## **Qualitative Results**

## Agenda

- Research Background
- Sample Observations
- Modal Choice
- Sources of Information and Channel Preferences
- Key Factors Impacting on Airline Selection
- Passenger Rights
- Summary and Next Steps

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## Qualitative Research Objectives

**Provide insight into airline dmp in order to inform the CAA as to the need to improve the information available to consumers and how this might best be achieved**

- Identify the information that consumers currently use when making a purchasing decision
- Understand what information is missing to create more informed decision making
- Explore the impact of the following aspects of the decision-making process:
  - Price
  - Service quality
  - Route/airline/airport
  - Environment
  - Passenger rights

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*Provide guidance for the quantitative phase – sample and material design*

# Method and Sample

## 8 Discussion Groups (90 Minutes)

Group	1	2	3	4	5	6	7	8
Region	Sth East	Sth East	Birmingham	Birmingham	Manchester	Manchester	Edinburgh	Edinburgh
Flight cabin	First/Business	Economy	Economy	Economy	Economy	Economy	Economy	First/Business
Airline type	Full service	No frills	Charter	No frills	Full service	Charter	Full service	Full service
Flight duration	Long haul	Short/mid haul	Short/mid haul	Domestic	Short/mid haul	Long haul	Long haul	Domestic
Journey purpose	Leisure	Business	Leisure	Leisure	Business	Leisure	Leisure	Business

- All respondents undertook a pre-task
- Review of latest airline selection (last 3 months)
- Enquiry exercise for a fictional journey



*Pre-Tasks intended to bring decision making processes and information sources to the top of mind*

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# Method and Sample (Corporate)

## 12 Individual Depth Interviews with Decision Makers (45-60 Minutes)

<b>Sector</b>	Law, Finance, Manufacturing
<b>No. Of Employees</b>	Small to corporate
<b>Type of Travel</b>	Car, Rail, Air
<b>Airline type</b>	Full service, Low Cost
<b>Flight duration</b>	Long haul, Short Haul
<b>Destination</b>	Domestic, US, Europe, Far East, Australia

*Responsibilities amongst Corporate Interviews were highly varied and often a mix of initiating and managing Travel Policy, Relationship Management and Admin/Booking*

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## Method and Sample (Corporate)

12 Individual Depth Interviews with Decision Makers  
(45-60 Minutes)

<b>Sector</b>	Law, Finance, Manufacturing
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*Responsibilities amongst Corporate Interviews were highly varied and often a mix of initiating and managing Travel Policy, Relationship Management and Admin/Booking*

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## Sample Observations

- Distance and Journey Purpose
- Corporate Policy

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## No overriding demographic or geographic sample differences

Journey variables (Distance and Journey Purpose) impact on airline choices but not on information needs



### Distance

- Long Haul
  - Broader VFM focus
  - Greater focus on SQ aspects
- Short Haul
  - Price vs VFM focus
- Domestic
  - Wider modal considerations e.g. car

### Purpose

- Business (Corporate and Business)
  - Self bookers and via TA
  - Focus on broader VFM equation
    - Critical and Persuasive Factors
      - E.g. flight time AND comfort
  - Desire separation from other travellers
  - Require facilities to enable work
  - FF programmes evident
- Leisure
  - Self bookers and via TA
  - Greater time investment on researching best flights
  - Package vs Flight Only Choices
  - Limited reward/loyalty relationships

**Accent**

*Critical factors broadly consistent across sample groups. Response to additional issues e.g. Environment and Passenger Rights highly consistent*

## Corporate Policy

Policies designed to balance the need to curtail costs with optimising work productivity



- Some evidence of economic squeeze
  - Greater justification of travel required
  - Consider alternatives where feasible e.g. Video conferencing
  - Greater monitoring of travel via exception reports
  - Investigating new systems e.g. Approve direct booking system
- Looking for employees to opt for cheapest travel options
- Reality = limited control over employees booking and low levels of policing in place
- Recognise the need for employees to work
  - Productivity part of cost evaluation
- Some allowed to travel Business/1<sup>st</sup> Class over 4/5 hours
  - OR if justify the need to work
  - OR VP status and above
  - Provide employees with cash incentives for lower travel
- One organisation more strict – economy only

**Accent**

*Consistent with other research, travel frameworks in place vs. true policies*

"I think the fact that more video conferences are taking place now is going to start to become more routine and people won't need to travel so much"  
Corporate

"There's not that much policing you can do on the class. Obviously you can make your recommendations and hope they take notice and do as the policy says."  
Corporate

"We have a travel department and it's the best deal they can get...every flight needs to be justified.....you need to sign it in blood.... The credit crunch has hit every company so they are looking at overheads to try and reduce them as much as possible"  
Business

"We're not that sophisticated. It's just a question of we're a small company who are conscious of our budgets, that's all and we tend to try and look after the pennies."  
Corporate

"From our perspective the cost is a factor so the travel company should be offering them the best value for money airline that they can find based on the criteria that the client wants. We do get fussy people who want certain seats and certain airlines, which sometimes doesn't mean there's too much flexibility on price. There are others who will just take the cheapest, I've got one here that says Club Class requested, obviously that's not always going to be the cheapest option."  
Corporate

"Normally it would be the length of travel. If it's over 5 hours then they'll go business class, if it's internal and over a shorter distance then we'd have a look and see what offers were available at the time. We'd seriously think about taking up offers rather than travelling business class over short distances."  
Corporate

"We did have a case where someone could have saved a considerable amount of money by taking an alternative, which was suggested to him, and he didn't take. I think that ended up costing the company about £4,000 more than the alternative offered to him. So for something like that you need to have a pretty valid reason."  
Corporate

"Obviously that's where the policy isn't strong, someone needs to be strong enough to implement it."  
Corporate

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## Corporate Travel Management

### Some firm airline deals in place but often more informal preferences evident

- Core responsibilities = Relationship Managers to the Travel Companies OR executing travel arrangements
- Majority had relationships with Travel Agents
  - Usage differed according to company size
  - Everything goes through them - Global-domestic travel
  - Vs. more selective usage – domestic undertaken internally, US via Travel Agent
- Many companies also allow employees to book direct (even if prefer to go via formal channel)
- Minority of airline-Corporate deals negotiated via Travel Agents
  - Emirates for Dubai
  - BA/Virgin for US
- More informal 'preferred partners' also exist for certain routes
  - SAS for Scandinavia
  - BA for domestic
  - Smaller players who cover obscure airports
- Airline selection based on fulfilment of critical and persuasive factors

"British Airways and Virgin are used due to what we negotiated price wise. The travel firms are able to negotiate because of their buying power as they have a lot of people using them. We've also got American Airlines and Emirates for going to Dubai."  
Corporate

"We let people book and it depends on the individual. We just sent someone to Australia and they went direct but had a choice to upgrade to business or first class or have the money."  
Corporate

"We are not allowed to use budget airlines – something about the flexibility of the tickets"  
Business

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# Modal Choice

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## Plane Only Option for Many

For short distance domestic travel, car and train are occasionally considered. Edinburgh to London = mostly plane preferers

			
+	<ul style="list-style-type: none"> <li>• Personal experience</li> <li>• My space</li> <li>• Private</li> <li>• Customised comfort</li> <li>• In-control of entire experience</li> <li>• Door to door</li> <li>• Tortoise effect (families)</li> <li>• Storing luggage/bags</li> <li>• Able to choose entertainment</li> <li>• Economies of scale (families/friends/colleagues)</li> <li>• Securer but not necessarily safer</li> <li>• Good value</li> </ul>	<ul style="list-style-type: none"> <li>• Fast</li> <li>• Reliable</li> <li>• Centre to Centre</li> <li>• No Baggage limit</li> <li>• Ability to work</li> <li>• Relaxing</li> <li>• View</li> </ul>	<ul style="list-style-type: none"> <li>• Speed</li> <li>• Efficient</li> <li>• Easy – booking, travel</li> <li>• Choice</li> <li>• Trusted/reliable</li> <li>• Day return</li> <li>• Exciting (LH, Leisure)</li> <li>• Lounge Access (Business)</li> <li>• Loyalty Schemes</li> </ul>
-	<ul style="list-style-type: none"> <li>• Not practical for long journeys</li> <li>• Traffic</li> <li>• High petrol costs</li> <li>• Additional costs e.g. congestion charge, car parking</li> </ul>	<ul style="list-style-type: none"> <li>• Cost = High</li> <li>• Restrictive tickets</li> <li>• Harder to get good tickets</li> <li>• Speed perception</li> </ul>	<ul style="list-style-type: none"> <li>• Cost = Variable</li> <li>• Lengthy check-ins/queues</li> <li>• Baggage allowance</li> <li>• Delays (Volcanic Ash)</li> <li>• Out of town airports</li> </ul>

Accent

*Environmental impact of different modes not key issue for Corporate, Business or Leisure*

"It will depend on schedules. We have to get people from Ireland over for a meeting next week, so that's definitely a flight. We could do a ferry, but it's unrealistic for the location. People coming down from Scotland for a meeting; they'll have company cars but is it fair to ask them to drive more than 4 hours. Not really; we'll fly them if it's applicable. Train travel can be extortionate sometimes, whereas if we time it right with the bookings we can get some fantastic prices with Bmi or RyanAir."  
Corporate

"It depends on what meetings you are going down for. If you have to be down quicker if its an all day meeting you have to be down for then you have to fly. If it's a 2 or 4 hour meeting you've got time to take the train"

Business, North, SH

"There's no option for some journeys but for some of our internal meetings, I think people think its quicker to travel by plane from Scotland to London"  
Corporate

"It's the changing. I just want to get on a flight and know I'm on it and I am going to where I am going..... If I ever book a train I don't have any stops"  
Business, North, SH

"The train's a bit of a red herring. It's on my mind and I have used them but it's usually cheaper to fly actually."  
Corporate

"We tried the train for a month and for people going to London you were getting there at 12 and leaving again at 3pm to get back at a reasonable hour - I think it was about the environment and saving money but it got a bad reception"  
Business, Scotland, Domestic

"I actually prefer that. I like being on a train and not having to sit for 2 hours just being able to get on, comfy at the table, and get settled in"  
Corporate

Accent

## Sources of Information and Channel Preferences

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# 3 Distinct Search Processes

Journey destination impacts on number and type of travel/airline companies

## Speculative

- Leisure Only
- Fancy a break
- Unsure of where to go
- Core need = inspiration/advice
- Sources
  - Use travel websites e.g. Lastminute.com or Expedia
  - Respond to emails e.g. Travelzoo
  - Airport websites
- Considerable time spent on research
- Consider destinations (multi-channel)
- Book or re-evaluate on basis of destination decided

## Destination Decided

- Leisure and Business
- New destination
- Core need = new information
  - Who flies there
  - Airport information
  - Connections
  - Price
- Go to comparison sites
- Compare 3-5 airlines
- Book via comparison or direct

- Leisure and Business
- Frequent Trip
- Core need – efficient booking
- Aware of timetables
- Favoured airlines in place
- May check 1 other airline

- Go straight to Airline and book

More Leisure Travel

More Business Travel

*"I go on the search engine and put in Birmingham Airport"*  
Leisure, Midlands, SH

*"I go to Skyscanner like the Moneysupermarket thing and it scans everything to that place"*  
Leisure, Midlands, Domestic

*"I would spend all my time looking at price comparison websites. I do what is quick and easy."*  
Corporate

*"I go onto BMI if I am going to Ireland because that just the cheapest and the quickest and I know the timetable"*  
Business, SH, North

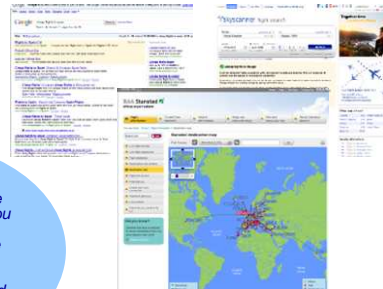


# Different Channels Used

Mix of channels used vs. absolute channel preferers.....



*"I prefer to book on the internet because I like the fact that its all in front of you and you can check the details but I'm pretty sure that I've phoned up for information over the last couple of years and ended up booking it over the phone"*  
Leisure, Midlands, SH



- F2F = primarily leisure
  - Considering package trips
  - Reassurance of F2F
  - Personal service
  - Known resource
- Telephone good for flight information or for package trips
  - Discuss options
  - Tailored approach
  - For Business customers who have dedicated TA relationship

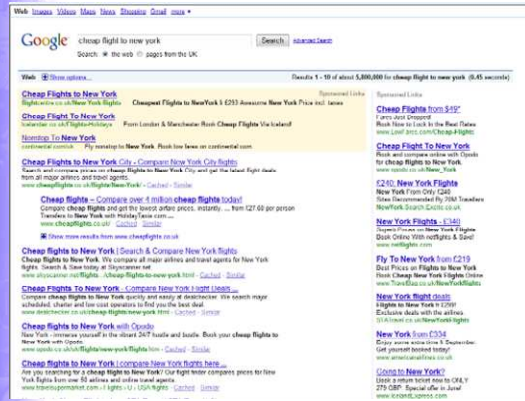
- Internet used across sample types
  - 1<sup>st</sup> layer of information
  - Or as booking channel
- Highly flexible
- 24/7
- Ability to personalise choices
- Change options without feeling pressured
- Quick and easy (maj.)

....but qualitative majority using the internet for gathering information and flight only execution



# Internet = I'm a Travel Agent....

Plethora of information for individuals and Corporate customers to use as part of wider selection criteria



- Nanosecond search provides access to a multitude of flight options
- Potential for information overload countered by increasingly standardised search and filter response
  - Visually scan top 5
  - Choose familiar sites or key words
  - Trust that these represent good vs. best ever deals
  - Similar model to other service searches
  - Explore top 5
  - Direct to site or/and via comparison site
- More experienced can skilfully navigate through flight options
- Less experienced can give up and try a different channel for booking



More experienced (Corporates and Majority of Consumers) using internet as a filtering tool to provide best flight option

"Yeah Oz travel. I phoned Oz Travel just to ask them about places and tours and stuff."  
Leisure, Scotland, LH

"I do it all on-line I tend to use Expedia.. I use them for flights and UK train travel. But it is all done on-line."  
Corporate

"It gets really frustrating. This time I got so fed up I went to the travel agents and booked it there"  
Leisure, North, LH

"I've got this crazy thing...for about a month before I book it I keep going back weekly watching some of them go up and feeling sad and some of the go down and feeling happy and then one day I'll just book it. I like to think I'm getting a bargain."  
Leisure, Scotland, LH

"I used Expedia, put in where I was going from and where I wanted to go and roughly the dates and they give you the flight options and from that decided who I wanted to fly with."  
Leisure, Scotland, LH

"I do sometimes go to Thomas Cook or I know where I'm going then I get it on the internet and ring straight through because we've got to give our discount"  
Business, North, SH

"Yes its £15 admin fee but its all done for you, she taps away and she books it and done. I have used the internet but I prefer the bit of personal service"  
Leisure, Midlands, LH

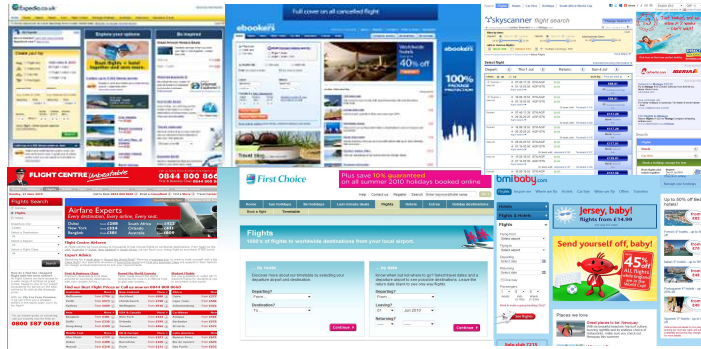
"I always just look up Canadian Affair to phone up Canadian Affair to get information from them. That's pretty strictly what we do all the time."  
Leisure, Scotland, LH

"It can be quite time consuming. I mean I like to find a bargain so I will sort of get on there and search for quite a while.."  
Leisure, Midlands, LH



# Best Web Sites

'Rules' for best websites come from direct sites, comparison sites and agencies



### Comprehensive Information

- Lists all options
- Shows clear prices
- Competitive
- Select a number of different airport at a time e.g. Travel Supermarket

### Intuitive Navigation

- Quick and easy
- Drop down boxes
- Limited distractions

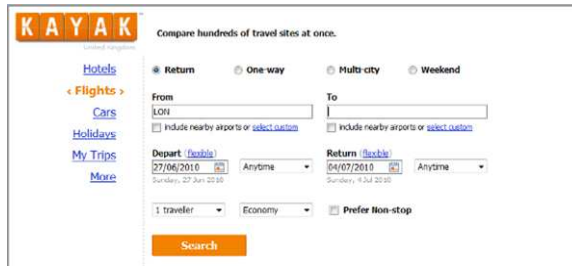
### Personal Information

- Remembers personal details
- Logging in and passwords can be prohibitive



# Emerging Technology

Mobile apps also mentioned in consumer and business groups



"We started using a new thing now to search for our flights, it's Kayak, it's an App on the iPhone which is perfect."

Leisure, Midlands, SH

"You put in your destination that you want to go to and it will direct you to the cheapest site for that flight, for that w/e or whatever. Its brilliant and its guaranteed to be the cheapest one"

Business, North, SH



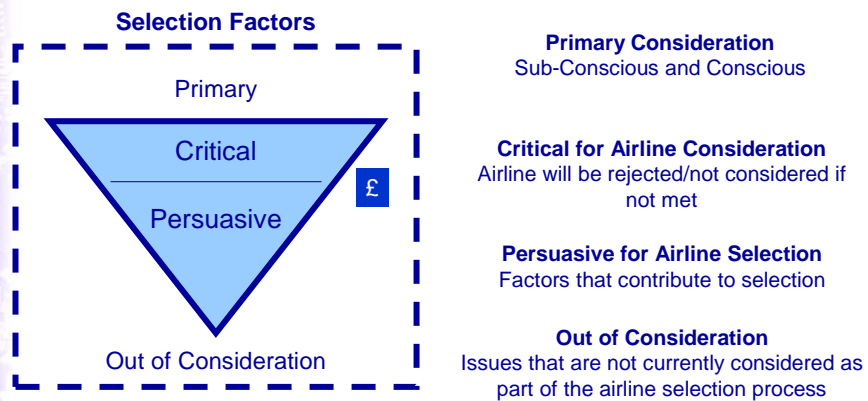
# Key Factors Impacting on Airline Selection

- Overview of Selection Process
- Brand
- Airport
- Price
- Service Quality
- Environmental Issues

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## Multi-layered Airline Selection Process

Model works for both Corporate and Individual decision making although persuasive factors differ

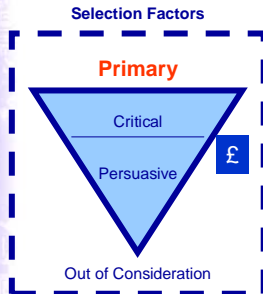


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*Persuasive factors irrelevant if critical factors have not been addressed*

# Primary Consideration Factors

Brand plays an important role in filtering process



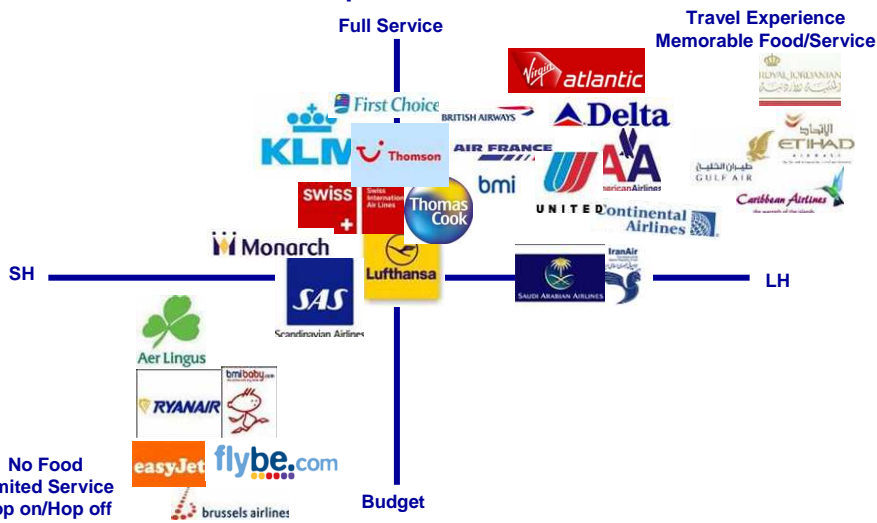
- Primary Factors = 1st Layer of Consideration
  - Can be sub-conscious or conscious
- Conscious consideration of Package vs. Flight only for leisure customers
  - Evaluate both sets of deals
  - Consider wider factors e.g. accommodation
  - For Corporate Customers shall I use TA or go direct
- Brand acts as sub-conscious filter
  - Shortcut to VFM/Comfort
  - Emotional connect/disconnect via brand advertising/communications = know what they stand for and I like it/don't like it
  - Previous positive/negative experience means some are automatically filtered in/out of critical evaluation
  - Reject some brands e.g Ryanair based on reputation for reliability



Price positioning and softer elements acting as criteria for brand evaluation

# Broad groupings create set of rules and shortcut airline selection

Distinction within groups made according to service, past experience







"And, you know, from previous experience, staff and customer service as well. A lot of Ryanair staff I find incredibly rude. Almost going out of their way to inconvenience you."  
Leisure, Midlands, Domestic

"I'm still pretty keen on BA though and I think it was only £20 or £30 difference. I see them as better quality and I am happy to pay for their service"  
Business, Scotland, Domestic

"It's a better calibre of staff that welcome and assist you...you get Business Class opportunities with BA and you don't get that with some of the cheaper airlines"  
Corporate

"I have travelled worldwide with BMI and found them excellent comfort assured as regards to Thomas Cook who cant guarantee comfort"  
Leisure, North, LH

"I would have selected Virgin flights. I trust the brand and its far better service than on charter flights. Its priced about the same and you can do almost any day that suited me"  
Business, SH, North

"We've used First Choice before numerous times and feel comfortable using them again. The price was also good value for money and flight times were suitable"  
Leisure, North, LH

"If there's certain airline you don't like and have had bad experiences of then you don't want to use them"  
Leisure, Scotland, LH

"I went on the Birmingham Airport website and you put in the destination and it tells you which carriers operate from Birmingham to Alicante which were Ryanair, BMI and Monarch. And then I also looked up the package websites and clicked on 'flight only', on Cosmos and that took me to Monarch as well so it was a choice of Monarch, Ryanair and BMI and I just looked at prices, times of flights, wanted to really avoid Ryanair, and I've been on a Monarch flight a couple of times before and it was comfortable and I was well treated so that's why I chose it"  
Leisure, Midlands, SH

## Critical Factors Impacting on Airline Selection

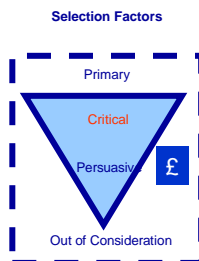
Optimum information = ability to easily trade off all four critical factors against whole ticket price

### Airline Timetable

- Flight times key for departure/arrival
- Often unwilling to trade off this factor
- Business =
  - Right flight for meeting times
  - Contingency flights
  - Regularity of flights home
- Leisure =
  - More flexibility but key factor
  - Not keen to arrive at unknown destination too early/late
  - Esp. older and younger children
  - Minority with teenage children will trade

### Direct Flight

- Where feasible, maj. always select direct flights over change
- Prefer to 'just get there' and get home
- Hassle of changing bags



### Airport (Destination/Origin)

- Most have a preferred departure location
  - Closest proximity to work/home
  - Ease of drop off/parking
  - Familiar layout
  - Good shopping!
- Information that provides airport options is welcomed
- Origin airport factor can be unknown and greater likelihood to change (if cheaper)
  - Prefer to be central
  - Close to final destination
- Need to know about parking/transport links

### Punctuality

- Airline with reputation for punctuality
- Information not always known but understood from brand
  - Previous experience
  - Brand noise
- Assume that most are quite punctual (scheduled)

Optimum = Comparison sites that show choices:

From: Manchester To: Malaga Time Options: Am/Lunch Direct: Airline A – Total £ (98% punctuality)

From: Manchester To: Almeria Time Options: Am/Lunch Direct: Airline B – Total £ (96% punctuality)





"I'm going on the 3rd to Lanzarote to Playa Blanca, it cost me £360 with a hotel and I looked at the times for Monarch, Ryanair and Iberia, Air France. Air France was three times as much as Ryanair but I could go say 8 o'clock in the morning and I could return back probably two or three in the afternoon whereas with Ryanair it's like 11 o'clock flight in the evening so"  
Leisure, Midlands, SH

"Being retired if its cheaper on a Wednesday we'll go on a Wednesday and if its cheaper on a Sunday..."  
Leisure, Scotland, LH

"I like to fly into Heathrow because I can get the Heathrow Express to Paddington and then I can walk to the office and its quite painless for me and I know my way round the airport and am really comfortable with it."  
Business, Scotland, Domestic

"And the thing about Birmingham as well is you can either get a friend to drop you off or you can get a taxi whereas if you're going further I always park at the airports."  
Leisure, Midlands, LH

"I think if you can fly direct from Glasgow to where you are going as opposed to maybe flying from Edinburgh and having to do a stop over then I would go through to Glasgow"  
Business, Scotland, Domestic

"We flew to Thailand and we stopped in Dubai airport - I loved it, I could've holidayed in Dubai airport. I quite like that 3 hour break and then getting back on the plane."  
Leisure, South, LH

"Last year I went to Toronto, because I was going by myself I was happy to take the connection via Paris and then straight onto Toronto but I wouldn't do it with the little one"  
Leisure, Midlands, SH

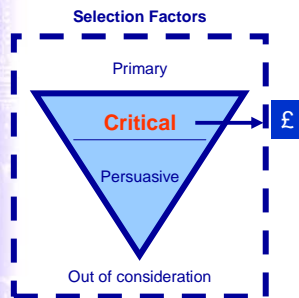
"I'd say one caveat on that is the flight times. I would go to Manchester if I could get a 9 o'clock flight in the morning rather than having to take a 4 or 5pm flight from Birmingham if I'm only going for 3 days, which gets me back into Manchester at 4 in the afternoon."  
Leisure, Midlands, Domestic

"And coming back, and value for money then because there is nothing worse than getting there in the middle of the night and coming back first thing in the morning"  
Business, Scotland, Domestic



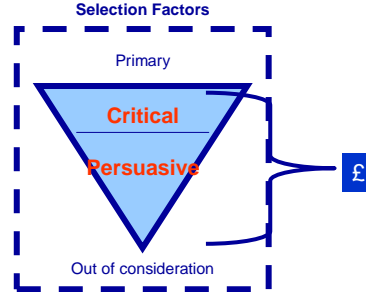
## Final Cost = Key Consideration

For some the selection equation is £ x Critical Factors.  
For majority of Business and LH, persuasive factors also come into the airline selection process



### £ x Critical Factors

- Short Haul mainly – leisure and some Business
- Does flight meet my critical needs of 1) time, 2) direct, 3) airport, 4) punctuality
- Optimum = lowest cost airline that meets all these needs
- Book regardless of persuasive factors



### £ X Critical and Persuasive Factors

- Business customers, Long Haul, Business/1<sup>st</sup> Class
- Does flight meet my critical needs as before?
- What other elements do I get included in the price?
- Is this airline offering me airmiles (Business/1<sup>st</sup> Class)
- Is it giving me the flexibility I need? (Business/1<sup>st</sup> Class)
- Is it giving me the comfort I need? (Business/1<sup>st</sup> Class)
- What is the total Cost?



# Difficult to Compare Costs

Lack of transparency throughout industry of representation of costs = biggest frustration



## Hidden Costs

- 'From Ex' prices = highly problematic
- Impossible to achieve cheapest price
- Large gap between advertised price and what you actually pay
- Need to include essentials e.g. tax, some baggage

"So all those hidden charges you think you are getting a good deal you think God that's good and suddenly it's all the add ons"  
Consumer

"But the price they gave me at the start and the price at the end was something like £75 difference"  
Consumer



## Dynamic Pricing

- Most understand dynamic nature of websites
- Price increases over time
- BUT experience is this happens so quickly that its impossible to understand logic
  - Has anyone else booked?

"I stopped doing that because I was just getting angrier and angrier with how I went through the cycle....it was never cheaper and every time I went back it got dearer"  
Consumer

"I think it would be better if there were set bands...at the moment the earlier you book the cheaper it is....should be some policy of having them set out their charges"  
Corporate

Optimum = display total price then take off extras AND ability to compare on cheapest overall return price

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# Although not impossible to compare, lack of consistency hinders process

"Assuming you're going from Birmingham, it's flight times and where you're going and then the package has to be competitive and you can start off on a £29.99 Ryanair flight but by the time you commit, it's £160"  
Leisure, Midlands, SH

"Like them saying oh wow look at this £7 return and then you go into it and say bloody hell £250?"  
Leisure, Scotland, LH

"They don't all display the prices evenly. So some of them look much cheaper but by the time you get to the end and add that bag and that seat and you want to check in and you want a seat belt....you feel like they're robbing you"  
Leisure, Midlands, Domestic

"I got confused with the reductions, £29 this one offer and at the bottom 'reduction if travelling alone' and underneath it had 'not alone' price so single fee, family fee, that was a bit confusing"  
Leisure, Midlands, Domestic

"Because I'm really not interested in how much the flight is (without tax) because you've got to pay the tax anyway"  
Leisure, Scotland, LH

"I think everyone knows it really difficult that's why we get the Travel Agents to do it."  
Corporate

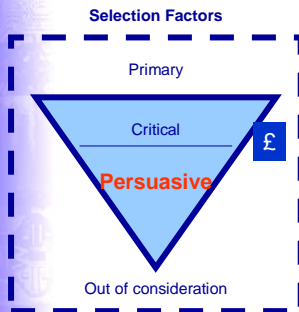
"Oh it is impossible to compare I don't even try. There is no point."  
Corporate

"And coming back, and value for money then because there is nothing worse than getting there in the middle of the night and coming back first thing in the morning"  
Business, Scotland, Domestic

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# Persuasive Factors Impacting on Airline Selection

Persuasive Factors include Ticketing Options and Service Quality issues – not critical but can make a difference in airline selection



- Ticketing
  - On line ticketing/check-in process (All)
  - Flexible ticketing (Business)
  - Rewards programme (Business)
- Service Quality
  - Comfort/Seat Configuration/Size of Plane
  - Crew
  - Fast track
  - Seat allocation
  - Access to airport lounge
  - Baggage allowance
  - In flight experience e.g. food and drink, breakfast
- Complaints handling not part of SQ framework at point of airline selection



More differences according to journey variables – SH/LH, Business and Consumer

## Service Quality



### Comfort/Seat Configuration/Plane size

- Important for mid-LH
- Adequate leg room/seat pitch
- Ability to sit together
- Flat beds for LH 1<sup>st</sup> Class



### Baggage Allowance

- Important for all – even for SH
  - Business – bag/laptop in hold
  - Leisure – flexibility esp. with children
- Frustrating that this is add-on
- Difficult to judge weight and allowances



### In Flight Experience

- Food and Entertainment important for LH
- Entertainment expected for LH e.g. Nintendo, on demand movies
  - Reason for selecting Virgin for parents
- Food/Drink important for SH for Business
  - Breakfast key in selection process
  - Free tea and coffee



### Airport Lounges/Check In

- Important for Business Customers
  - Free, decent Tea/Coffee
  - Place to work
    - Plugs, wifi, news
  - Peace and quiet
  - Sanctuary
- Fast Track check in for Business and Parents



"I think they have nearly scrapped all the other meals but if you're early enough you still get breakfast"  
Business, Scotland, Domestic

"It means more the longer you fly I think when you're there for just an hour I can get a tea or coffee"  
Business, Scotland, Domestic

"You find with the budget airlines, they don't help you as much like for me at the moment, we're travelling with a pushchair..."  
Leisure, Midlands, Domestic

"I think on that last flight I booked on the first page the price went up by £70 on the second page, I think, and then included the meals and the baggage and the additional 5Kg, 20 kilos rather than 15, the only trouble is I have no idea if I need 20 kilos or 15 kilos but they make it clear if you book for 15kg and you go over it, they're going to charge you like £30, so you think well I'll pay the £5"

"I'd rather pay a bit more and then I get my free upgrade so I get more for it - I like to be comfortable when I fly especially for 7 hours"  
Leisure, Scotland, LH

"I would check it on the website. I think Continental do personal screens and kids programmes and she sits and watches cartoons on the plane and plays her nintendo"  
Leisure, Scotland, LH

"But when you're with Thomas Cook they actually give you a seat number and they ask you if you'd like a window seat, if you want to pay a bit extra you've got the option so when you book you know exactly where you're sitting and you can always change it"  
Leisure, Midlands, SH

"Monarch also give you the extra luggage allowance for when you're going for a fortnight with kids so that's why I went for Monarch."

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## Interest/Need for SQ Score

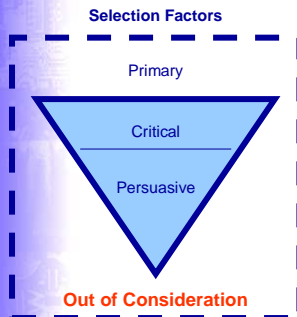
### Provision of Service Quality score unlikely to assist in airline selection

- SQ persuasive vs critical selection factor
  - Some key elements are important for Business and LH
  - For example, lounges, entertainment
  - BUT will not come into play until critical factors are met
- Current SQ comparisons are based on previous experience and broader brand knowledge
  - Seen as adequate
- SQ scores could be interesting
  - Reliability/punctuality scores (critical factors)
  - BUT not for softer measures
  - Seen as difficult to measure
  - And risk over complicating the selection process further
- SQ information featuring complaint handling data and policies are not needed
  - These factors are not considered at point of selection

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# Environmental Issues

Regardless of personal or Corporate perspective, environmental issues are not considered within the airline selection process



- Companies have broad environmental policies
  - Emission reduction commitments/Recycling
  - Working towards ISO 14001
  - But limited real impact on existing travel policy
- Mixed response from Consumers
  - Unsympathetic, green deniers to Keen Green e.g. recyclers, moral conscience
  - BUT all lack motivation to filter airline selection through environmental performance (even if simple)

"I am interested in environmental issues and I do recycle but when it comes to business flights I need to be in London at a certain time...and I'm collecting airmiles"  
Business

"It's a nice to know but I'm not quite sure. Everything else being equal it would be a factor but I would still probably go by location and time"  
Corporate

Sense that this shouldn't be consumer led. If provided might be hard to ignore. One Corporate – if simple visual then we might look at it...



The block contains ten speech bubbles with the following text:

- "Some people would probably be more aware and conscious of what they're doing. I'm not saying all people, some people can't be bothered and would take no notice at all. A lot of people are more aware now and would take it into consideration. Our policy is to save a certain tonnage of emissions through choosing certain ways to travel and making people more aware."  
Corporate
- "We would have an expectation to a degree. Obviously we have a CSR committee that deals with that side of the business. Obviously it couldn't restrict us to that greater degree, we'd have to look at what impact that would have on the travel with regards to timings and cost."  
Corporate
- "We have got corporate and social responsibility policies which is just a marketing thing to be honest"  
Corporate
- "Not an environmental policy no – we sell plastic....we do recycle we have a business that recycles but we don't have a formal environmental policy"  
Corporate
- "I'd love to say it would make a difference but at this point in time with what the UKs going through. I'm targeted to save 10% on last years travel costs"  
Corporate
- "There was a report about the polar ice caps...its just politicians trying to gouge us for more money that they're not going to spend"  
Corporate
- "Is it a level playing field...EU make directives so all UK based airlines capitulate and other countries might not so we're disadvantaged and costs rise Glasgow"  
Business, Scotland, Domestic
- "No, I understand that (name) has put in a big order with Boeing for a lot of their new planes which will be far more environmentally friendly than those of the major airlines but I don't think that'll make the slightest bit of difference in choosing whether or not to fly with them"  
Leisure, Midlands, SH
- "Not at the moment but it might do is we've recently employed an environment officer who's starting to have an input on these things - so it's a possibility in the near future. And that would be on carbon emissions"  
Corporate
- "I agree with that there's a lot of companies making vast sums out of this so called green issue and its just a money making scheme"  
Business, Scotland, Domestic





# Passenger Rights



## Passenger Rights

Despite Volcanic Ash incident, Passenger Rights are not currently part of airline selection process (people think issues are covered by insurance)

### Fear Ladder

Plane Crash
Cancellation
Delays
Lose Baggage
Uncomfortable Flight

- Apart from death, worst fears relate to losing all or part of holiday (Leisure) or missing meetings (Business)
- Awareness of Passenger Rights is limited and depends on past personal experience
- Responsibility of these issues is felt to sit with the airline
  - Duty to get you home on another flight
  - Duty of care to look after you within the airport environment
  - Delays – provide drinks after 2 hours, food/vouchers after 4 hours
  - Accommodation for overnight delays
  - Unsure of cancellation policy
- Limited awareness of over booking policy
- Some personal experience of loss of Baggage within sample
  - Claim on insurance
  - Try for compensation from airline but hassle!

*Whilst some concerns voiced over provision of additional information – over complicate selection, additional choice filter - pre-tasks reveal that more information regarding cancellation costs/policies might be welcomed (key to quantify)*

*"But they pay them off. If an airline knew that they were overbooked they'd pay them off because my friends have been there and they've said look we've overbooked this flight we're going to offer you accommodation for the night plus £250"*  
Leisure, Midlands, SH

*"Information about what the airline would provide/pay for if flights were cancelled"*  
Leisure, LH, North

*"Well, they're more reliable, well not probably at the moment with the strike and stuff but forgetting about all of that, I'd say they were more reliable especially with the ash crisis at the moment, I think I'd rather book a European airline to go somewhere, my sister's just got stuck in Dubai on Emirates so they had to fork out a fortune because it wasn't a European airline because of the ash thing"* Leisure, Scotland, Domestic

*"At the end of the day the ones that only paid £50 for their flights I mean the companies have been running at massive losses. I don't think an airline should have to put you on hotels and feed you for 2 weeks"* Business, Scotland, Domestic

*"Airlines should make customers aware of what costs will be covered if flights are cancelled. People are going to want access to this information particularly since this volcanic ash incident"*

Leisure, LH, North

*"We had a few staff stuck out in other countries but the travel firm had a member of staff who was constantly calling around airlines and trying to find out the latest and book tickets in order to get the people back. Like I said they've come out of that really well. Unfortunately that hasn't stopped us thinking about the tender process, but that isn't down to their service it's the cost impact to the company as we're travelling more to the US."* Corporate

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## Corporate Perspective

- No strong awareness or knowledge of company / employee rights
- Airlines should look after their staff if:
  - Long delays (more than 4 hours) = food and drink
  - Overnight delays = accommodation
- Strong support for the airlines over the recent VA incident
  - Not airline's fault
  - Shouldn't have to cover all costs
  - Companies are responsible for their employee's wellbeing so during the ash cloud issue some put up their staff in hotels anyway
- The general feeling is that responsibility for passenger rights should lie with either a body like the CAA (i.e. independent) or a cooperation between airlines, airports and government
- Publishing customer rights would not persuade many to travel with one airline over another
  - Might help brand image e.g. open and transparent
  - BUT would still be dependent on critical and persuasive factors x cost

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## Summary and Next Steps

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### Overall Summary

- Heavy dependence on the internet for flight information and booking although mix of channels used
- Quality of information is good
  - Lots of choice available
  - Generic internet advantages (24/7, personalise)
  - No strong appetite for more data/information
- BUT pricing is a minefield and simplification would be welcomed
  - Ability to compare prices is problematic
  - Meaningless starting costs displayed (without essentials)
  - Dynamic pricing models are hard to understand
- Brand is used as a primary consideration filter and knowledge is adequate
  - Based on individual experience
  - Brand positioning/communications
- Critical Factors are:
  - Flight times/timetables
  - Departure airport (and destination)
  - Direct Flights
  - Punctuality } £
- Environmental Issues and Passenger Rights are not considered within the current airline selection framework
  - Demand for additional related information is fairly low

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# Information Improvements Suggestions

Pricing of the Critical Factors = key area to address

