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Air Passengers in Lowland Scotland airports BAA Airports Market Inquiry

Submitted to

Competition Commission

COMPETITION  COMMISSION

Prepared by

Nicole Holt
Associate Director

ORC INTERNATIONAL

Angel Corner House
1 Islington High Street
London N1 9AH

www.orc.co.uk

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1. Executive summary

1.1. Travel options

The main information source when booking and researching air travel is the Internet: 75% of respondents booked in this way, with a small proportion (23%) using a travel agent.

Over half (53%) of respondents state they could not have used another means of travel, with those travelling on international flights in particular (17%) restricted to flying to their destination rather than using another mode of travel. For those that could have used another means of transport, the most popular alternative was the train (cited by 68%). Most (76%) chose to fly to their destination to save time since it was quicker.

1.2. Travel choices

The choice of airport is important for 9/10 respondents and for over half (54%), it is very or extremely important. Almost half (47%) of respondents had a choice of airports; of those who considered other airports, most (42% overall) considered Glasgow airport. Those using Glasgow mainly considered Edinburgh (42%) or Prestwick (32%), and most Edinburgh users (72%) considered Glasgow, while Prestwick users essentially either considered Glasgow (71%) or Edinburgh (33%).

For those that did not have a choice of airports, it was because the airport they used was the only one they could get to (48%). The main reason (66%) for choosing the airport they ultimately flew from/to was due to its location.

1.3. Alternatives

Had their flight not been available, most (61%) would have chosen to fly from another airport and the most popular alternative airport is Glasgow (46% overall). Specifically, those using Glasgow would change to Edinburgh (48%) or Prestwick (24%), and almost all Edinburgh users who would change airport would change to Glasgow (83%); similarly the great majority of Prestwick users would change to Glasgow (73%) and others would go to Edinburgh (18%). For those choosing another means of transport if the flight had not been available, most (61%) would have travelled by train.

This alternative would have been no different or worse in terms of journey cost (70%), but worse for Prestwick respondents (48%) who are more price sensitive. The journey would have been worse overall in terms of the total journey time (54%).

When prompted to think in turn about each of the airports that could be considered accessible from lowland Scotland, most would consider travel from Glasgow, Edinburgh and Prestwick as a realistic alternative (38%, 30% and 28% respectively), had their flight been available at the same time and cost. Realistic alternatives varied depending on the airport: half the Glasgow users would consider Edinburgh (53%) and Prestwick (50%); almost two thirds of Edinburgh users

(61%) would consider Glasgow; almost half (46%) the Prestwick users would consider Edinburgh and most (83%) would consider Glasgow.

1.4. Price sensitivity

Nearly two-thirds (64%) bought the cheapest flight available; this rises to 81% at Prestwick. For those who did not choose the cheapest flight, the main reason (58%) was that a more expensive flight had better flight times.

Prestwick attracts the budget passenger: they pay much less for their flights overall (£70 median cost), and they spend slightly less on the total trip (£300 median cost). However, their flights make up a smaller proportion of the total trip cost than overall.

1.5. Cost scenarios

Three quarters (76%) of all respondents would have been prepared to pay a £25 increase per person in the total airfare, with business respondents most likely (86%) to pay over £25 extra per person.

The next-best airports, mentioned by those who would have switched to an alternative airport, mirrored the next-best alternatives given by all respondents (see 1.3). For example, overall almost half (49%) would switch to Glasgow.

For those who would have switched to an alternative means of transport, half (54%) would switch to travelling by train or car; again, this mirrors the answers given earlier by all who said that their next-best alternative was another mode of transport.

2. Introduction

2.1. Background to the study

The supply of airport services by the British Airports Authority (BAA) is the subject of a Competition Commission market inquiry, referred to by the Office of Fair Trading (OFT). This report relates to research for that inquiry.

The OFT hypothesised that in Lowland Scotland, BAA's ownership of Edinburgh and Glasgow airports limits competition between these two airports. The airport charges imposed on airlines by BAA are likely to impact directly on the cost of flying to passengers. While Prestwick airport is felt to offer some competition to Glasgow Airport, the OFT believes further competition may provide further benefits to air travellers, particularly in terms of charges.

ORC International was commissioned by the Competition Commission to conduct a piece of research to understand what drives the behaviour of air passengers in their choice of airport. The research focused on the airports in lowland Scotland, namely Edinburgh and Glasgow (operated by BAA) and Prestwick (operated by Infratil).

2.2. Objectives

The principal objective of the study was to understand the role of price in passengers' decisions, specifically in terms of their choice of airport and the potential impact of price increases.

The specific research objectives and topics for this research were to:

- Understand information sources used when booking flights
- Understand the range of options considered when making their flight decisions
- Identify reasons for choice of travel method and flight
- Identify the options available in terms of airport choice
- Identify how far other options represented realistic alternatives
- Understand the role of price when making their flight decisions
- Understand the impact of various different cost scenarios

2.3. Research process

Fieldwork was conducted during August and September 2007 using a two-stage methodology. Arriving and departing passengers were approached at the airport, taken through a short screening questionnaire and their co-operation secured to take part in a longer telephone interview a few days later using Computer Assisted Telephone Interviewing (CATI) techniques.

Eligible respondents were defined as passengers who were departing from or arriving at Glasgow, Edinburgh and Prestwick airports and involved in choice of which airport to fly to/from. Moreover, all had to be aware of the approximate price they paid for the flights or package.

Additionally, the following passenger types were excluded: member of armed services on duty, Embassy or consular staff on duty, airline staff on duty.

2.4. Sample structure

The following interviews were achieved across each airport.

AIRPORT	NO. OF RECRUITS	TELEPHONE INTERVIEWS
Edinburgh	1268	443
Glasgow	1094	422
Prestwick	641	175
<i>Total</i>	<i>3003</i>	<i>1040</i>

Consideration was given to fact that recruitment took place during the peak summer holiday period. Due to the considerable fluctuation in passenger profiles at different times of the year, quota targets were set based on the Civil Aviation Authority (CAA) annual statistics at each airport by flight destination and purpose:

- Destination of flight (domestic or international) – quotas matched the annual proportions of passengers on domestic and international flights at each airport in according to CAA statistics for 2006.
- Purpose of journey (business or leisure) – quotas matched the annual proportions of business and leisure passengers, as measured by CAA in 2005 and adjusted for the larger size of groups travelling for leisure, since one respondent represents all passengers in the group.

The survey responses showed that groups of leisure passengers on international flights were larger than groups of leisure passengers on domestic flights. Although this difference was smaller than that between business and leisure it was not used to set quotas and so quotas did not match annual proportions in all respects. To correct this, responses have been weighted to match the proportions of passengers to the CAA annual survey of 2005. Unweighted results are shown where this makes no difference to the proportions responding. The weights inflate the total sample by 8% so that the weighted base for all 1,040 respondents appears as 1,126.

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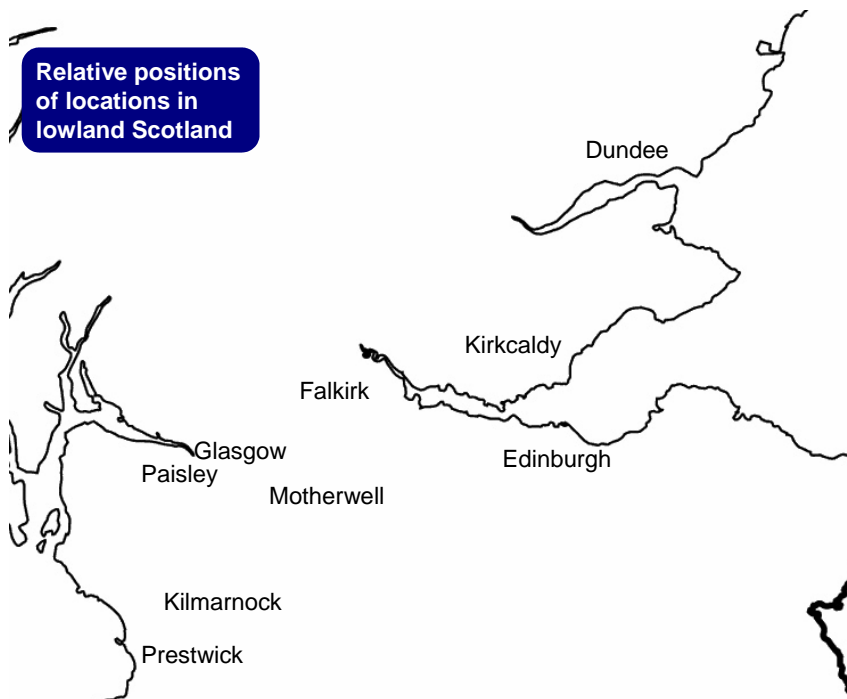
Q6R: Which of these best describes the purpose of your journey?

Base: All (n=1126)

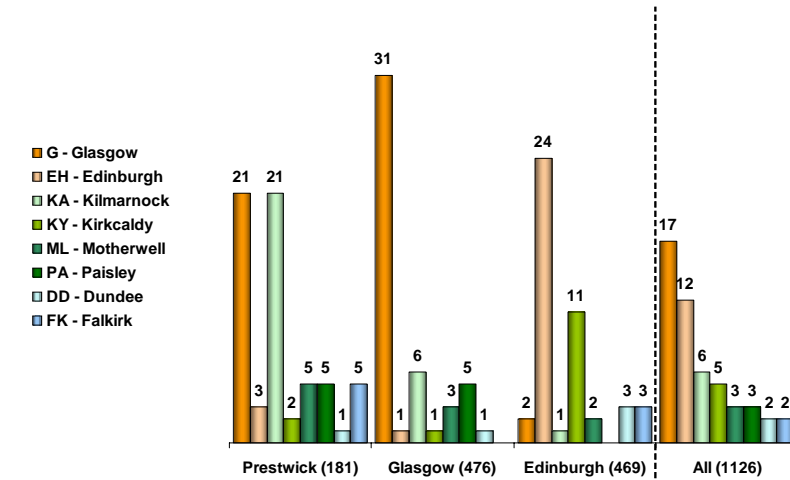
WEIGHTED

3.1.2. Journey to / from the airport

Glasgow postcodes were the most popular start / end point for those travelling to or from the three airports. The chart shows the most popular postcodes given. Over one third of respondents using Glasgow airport gave postcodes that were from the surrounding areas: Glasgow (31%), Paisley (5%), and Motherwell (3%) to the south-east. However, 6% gave postcodes from Kilmarnock, which is close to Prestwick, and 3% from as far as Edinburgh, Kirkcaldy, or Dundee. At Edinburgh airport, one quarter (24%) gave postcodes that were local to Edinburgh (EH postcodes), to Kirkcaldy (11%), Falkirk (3%) and Dundee (3%). However, 5% gave postcodes that were from Glasgow, Kilmarnock or Motherwell. At Prestwick, respondents gave postcodes from Glasgow (21%), Paisley (5%) and Motherwell (5%), or were local from Kilmarnock (21%). However, some gave postcodes from Falkirk (5%) and Edinburgh (3%), and others from as far as Kirkcaldy (2%), and Dundee (1%).



Respondent locality



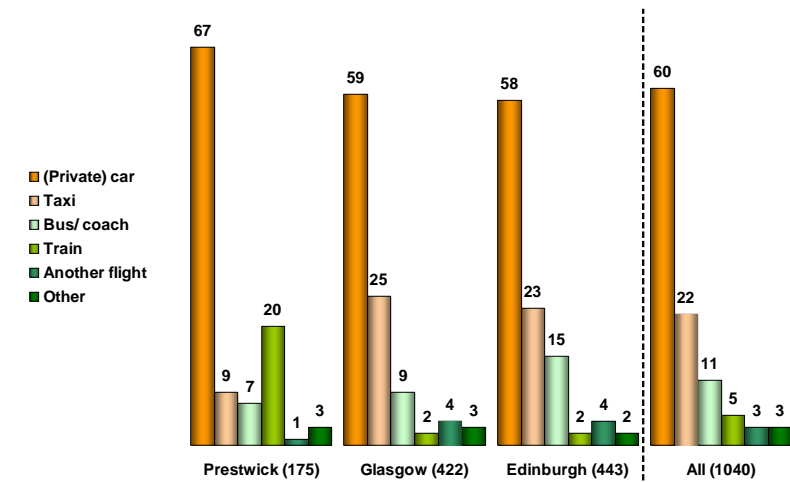
Q5: Can you give me the first part of the postcode district of the place you set out from / travelled to?
(Excludes Other / DK. Includes only total mentions over 1%)

Base: All (n=1126)

WEIGHTED

Most respondents (82%) travelled to or from the airport by car or taxi, rather than public transport. At Prestwick however, which has good rail links, 20% travelled by train and far fewer respondents (9%) travelled by taxi.

Journey to / from airport

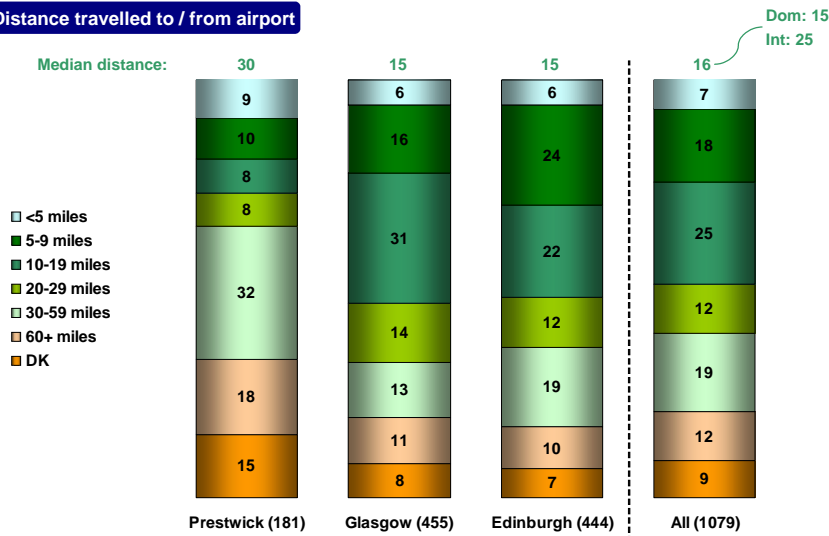


Q9: Which forms of transport did you use to get to / leave the airport on that day?

Base: All (n=1040)

One half (50%) of respondents travelled less than 20 miles to get to or from the airport. Respondents using Prestwick are more likely (73%) to have travelled 20 miles or more: the median distance for Prestwick was double that of the other airports. Respondents on international flights travelled further than those on domestic flights to get to or from the airport: the median distance for international flight respondents was 25 miles compared to 15 for domestic flight respondents.

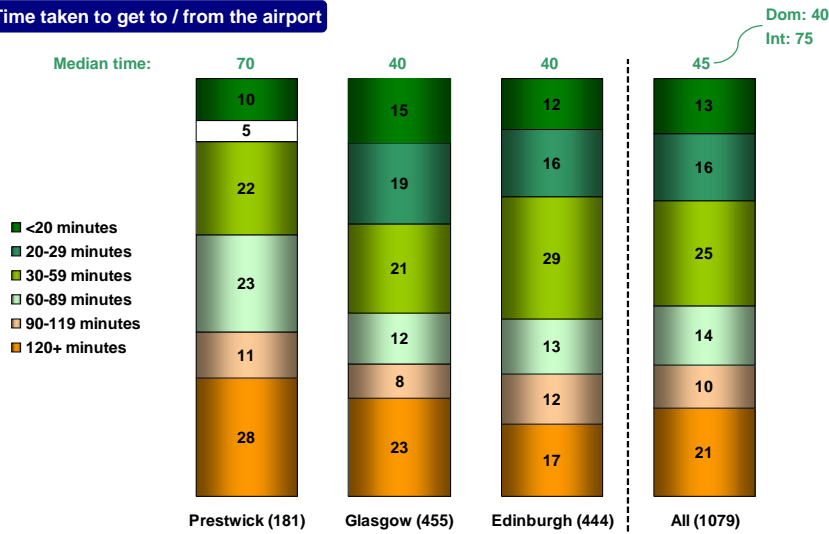
Distance travelled to / from airport



Q10a: Roughly, how far did you travel in miles to get to the airport / to your final destination when you left the airport on that day?
Base: All who did not change planes (n=1079)
WEIGHTED

Over half (54%) of respondents travelled for less than an hour to get to or from the airport. Again, Prestwick and international flight respondents travel for longer to get to or from the airport with the median time being at least 1 hour and 10 minutes, compared to 45 minutes overall.

Time taken to get to / from the airport



Q10b: Roughly, how long did it take you to get to the airport / to your final destination when you left the airport on that day?
Base: All who did not change planes (n=1079)
WEIGHTED

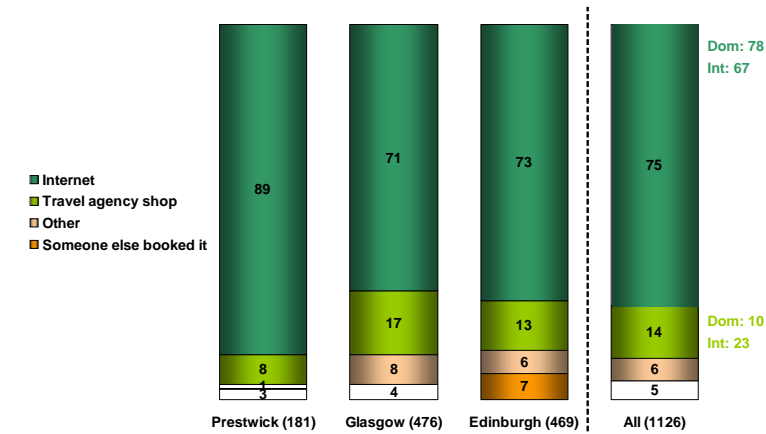
3.2. Options and choices

The main body of the research survey looked at the information sources respondents used when deciding which flight to take, the options available to them, which of these options they considered and the reasons for choosing the flight that they ultimately took. The survey then turned to questioning around alternatives and what respondents would have done in certain scenarios.

3.2.1. Information sources

Three quarters (75%) of respondents booked via the Internet. This figure increases to 89% at Prestwick airport, where respondents are generally more price sensitive. Respondents on international flights are more likely to book via a travel agent (23%).

Trip booking

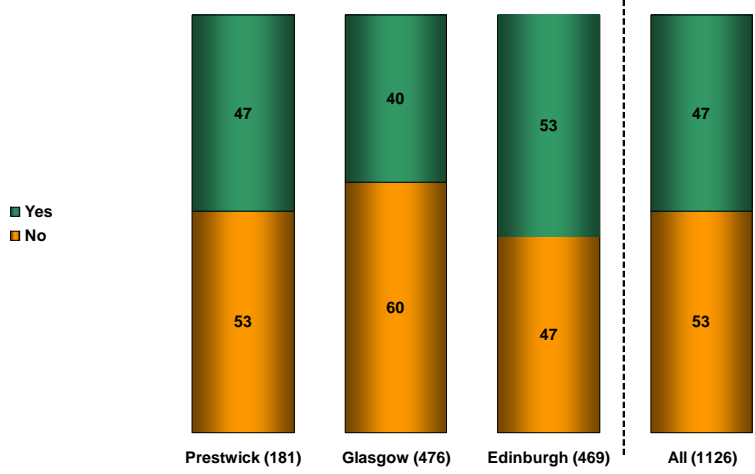


Q12: How was your trip booked?
 Base: All (n=1126)
 WEIGHTED

3.2.2. Options available

Over half (53%) of respondents state they could not have used another means of travel. Unsurprisingly, respondents on international flights are least likely (17%) to have been able to use another means of travel.

Other means of travel



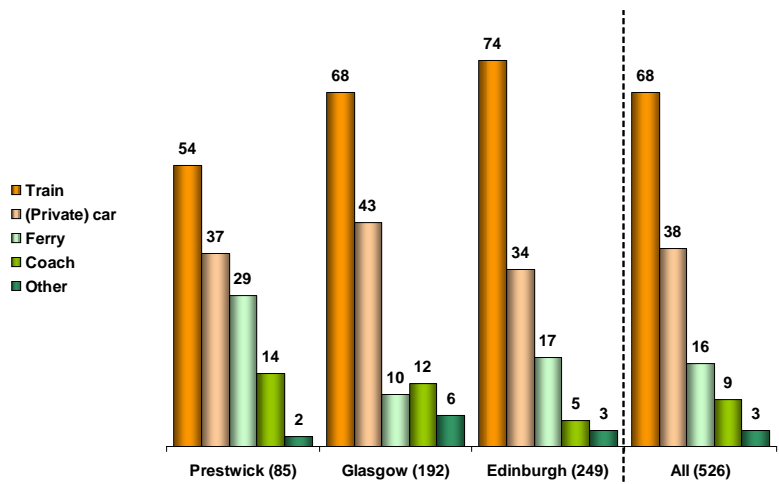
Q24: Would you have been able realistically to use another means of travel instead of flying?

Base: All (n=1126)

WEIGHTED

Of those who could have used another means of travel instead of flying, the most popular alternative mode of transport is the train: 68% overall would have been able to take the train instead of flying. Edinburgh respondents (of which 83% are on domestic flights) are most likely to have had the option of taking the train.

Other modes of transport



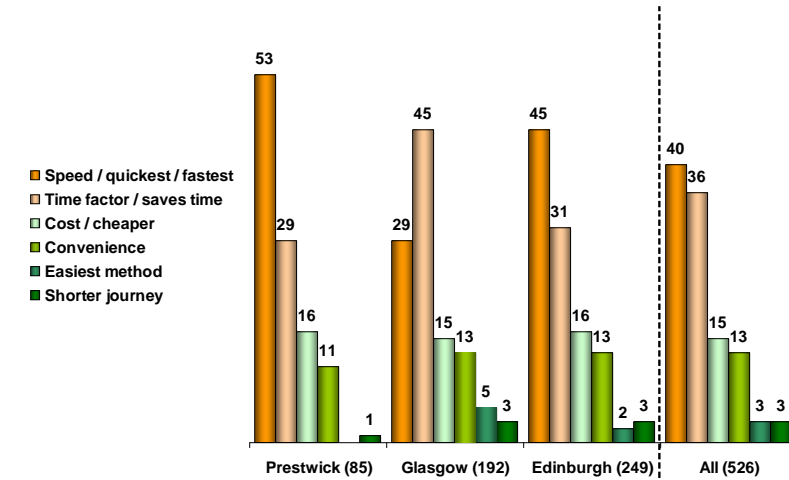
Q25: What mode(s) of transport would you have been able to use?

Base: All who could have used another means of travel (n=526)

WEIGHTED

For those who could have used an alternative means of travel, the plane was chosen by most (76%) because it was fastest and saved time.

Reasons for choosing to fly



Q26: What were the main reasons you chose to fly, rather than use an alternative mode of transport? (Mentions over 2%)

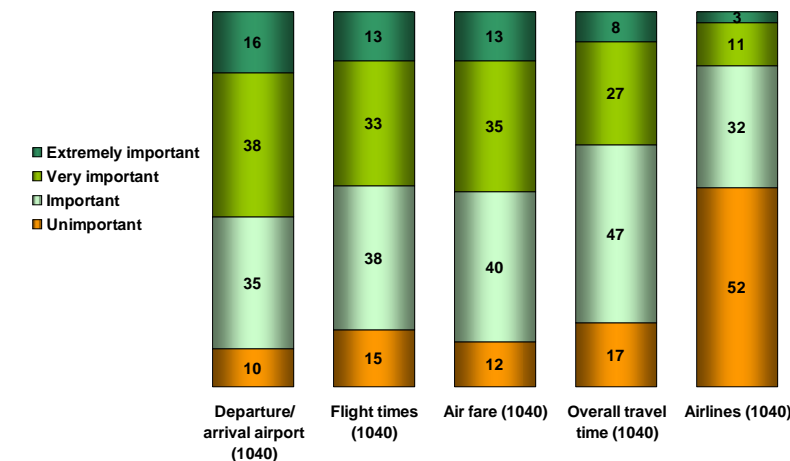
Base: All who could have used another means of travel (n=526)

WEIGHTED

3.2.3. Options considered when choosing flight

The airport is extremely important when choosing and booking a flight for 16% and very important for 38%: only 10% state the airport is unimportant. The airline brand is least important: over half (52%) rate this as unimportant and only 3% as extremely important.

Decision factors



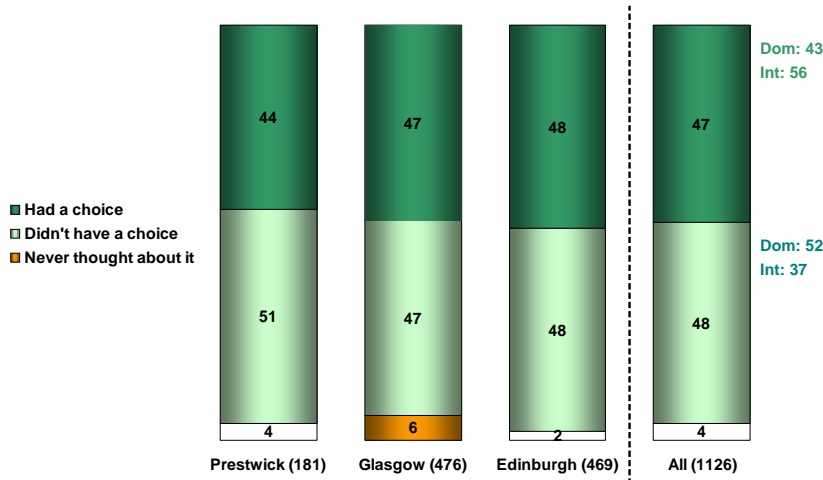
Q20: Please tell me how important each of these factors were to you when choosing and booking a flight.

Base: All (n=1040)

Almost half (47%) of respondents had a choice of airports when planning their journey; that is they could have realistically used a different airport. Respondents on international flights in particular had a choice of airports (56%). Only a small proportion (4%) overall did not think

about whether they did have a choice of airports, which ties in to the importance that respondents placed on the departure / arrival airport.

Choice of airports



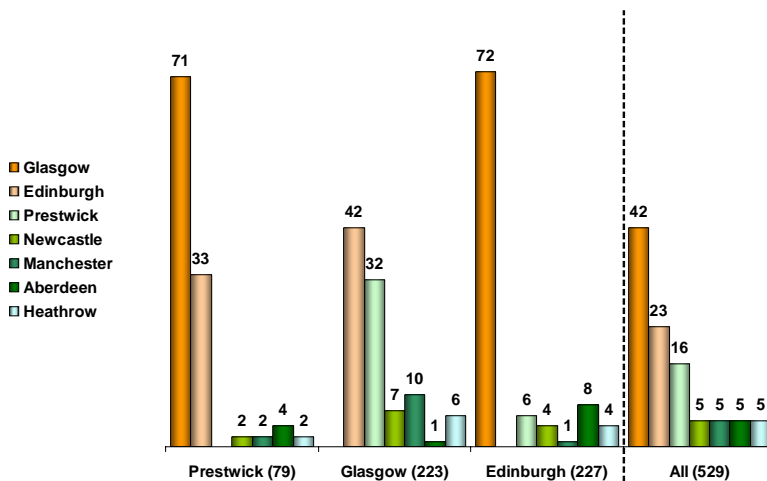
Q21: Did you have a choice of airports when planning this journey? That is, could you have realistically used a different airport?

Base: All (n=1126)

WEIGHTED

Of all those who had a realistic choice of airports, Glasgow was the most considered overall: nearly three quarters (71% and 72% respectively) of those using Prestwick or Edinburgh airports would have realistically considered using Glasgow. This links into the fact that significant proportions of those using Prestwick or Edinburgh airports travelled from or on to Glasgow postcodes. At Glasgow, over four in ten (42%) would consider Edinburgh and over three in ten (32%) would consider Prestwick.

Choice of airports



Q22: Which other airports, if any, did you consider? (Mentions over 2%)

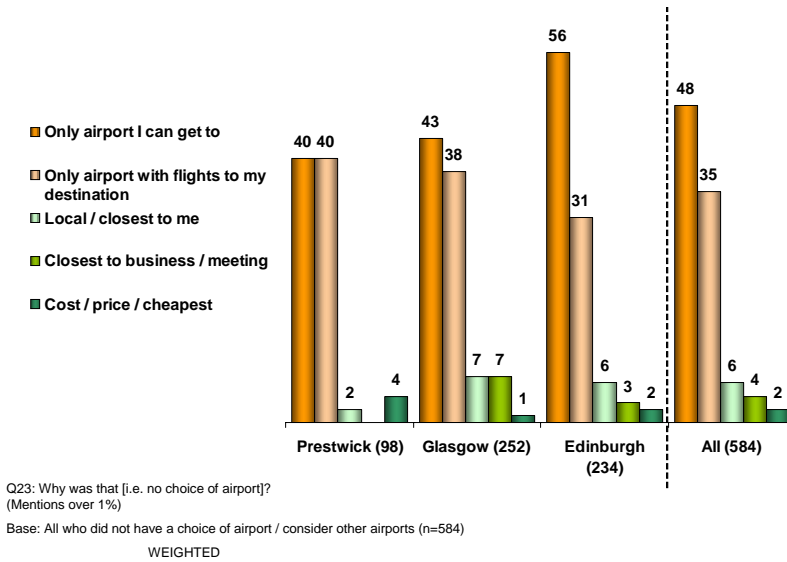
Base: All who had a choice of airport (n=529)

WEIGHTED

For those respondents with no realistic choice of airport, almost half (48%) state that the airport they used is the only airport they can get to. In particular, those at Edinburgh are most likely (56%) to be only able to get to Edinburgh airport. This is confirmed by the earlier finding that

24% of those using Edinburgh were from Edinburgh postcodes and 14% from postcode areas east of Edinburgh. Over a third (35%) of those with no choice of airport say it was the only airport with flights to their destination.

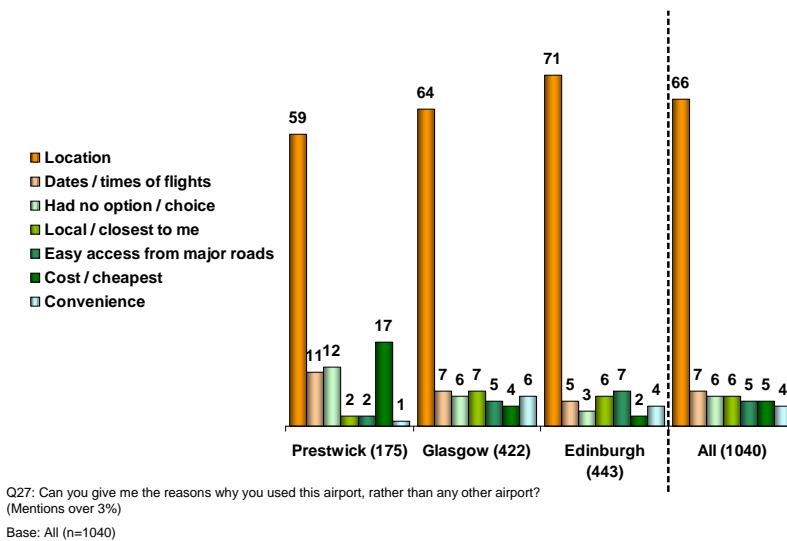
Choice of airports



3.2.4. Reasons for choice

The airport ultimately used was chosen for its location by nearly two thirds (66%) of respondents, though 17% of respondents using Prestwick said that cost was an important factor. Earlier findings show that location of airport is important for 90% and a reason for not having a realistic choice of airports (48% of those with no choice of airport said it was the only airport they could get to).

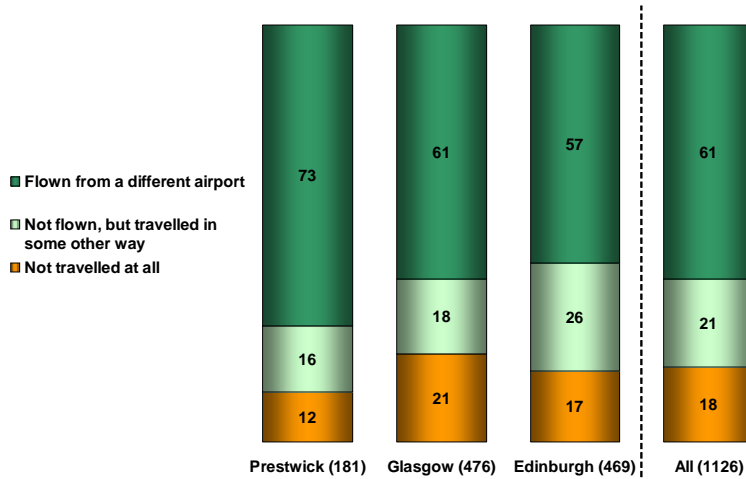
Reasons for choice of airport



3.2.5. Alternatives

If no flights had been available when they made their travel arrangements, most (61%) said they would have chosen to fly from a different airport even though fewer than this considered that they had a choice when they booked the flight (see 3.2.3). In particular, Prestwick and international flight respondents are most likely to have flown from a different airport rather than using an alternative means of travel (73% and 82% respectively).

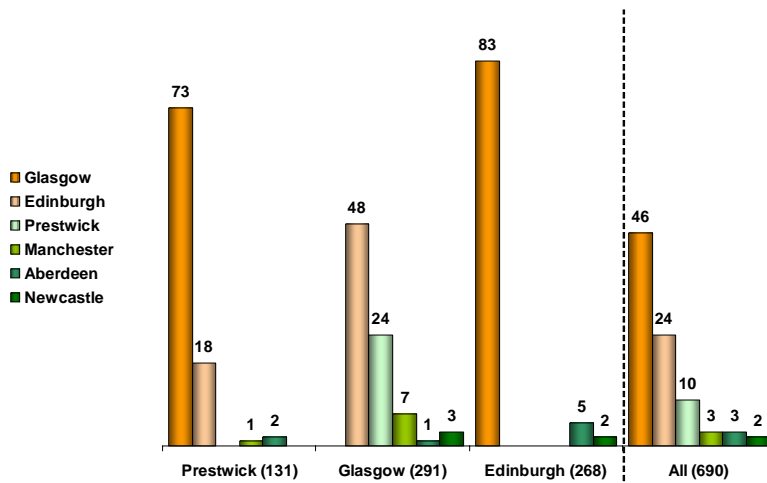
Alternative scenario



Q28: If no flights from this airport had been available when you made your travel arrangements, what would you have done instead?
 Base: All (n=1126)
 WEIGHTED

Of those who would have flown from a different airport (61% overall) had no flights from their chosen airport been available when they made their travel arrangements, 83% of those using Edinburgh and 73% of those using Prestwick would have chosen Glasgow. Half (48%) of those already using Glasgow would divert to Edinburgh and a quarter (24%) would use Prestwick.

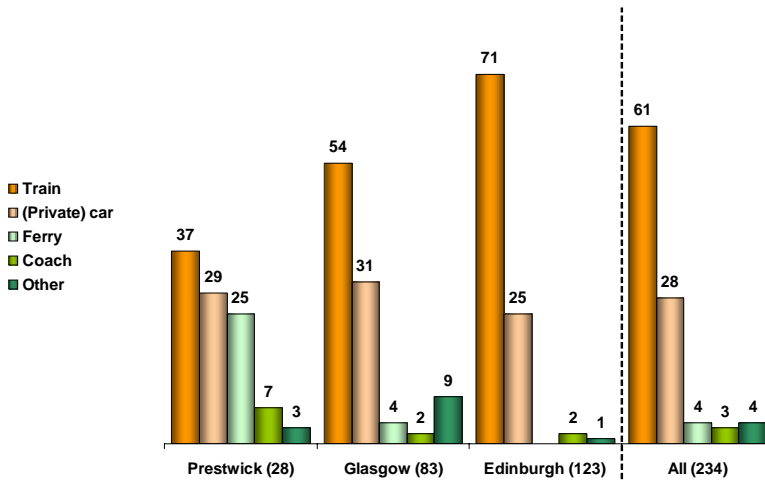
Alternative airport



Q29: Which airport would you have used instead?
 (Mentions over 1%)
 Base: All who would have flown from a different airport (n=690)
 WEIGHTED

Of those who would have used another means of transport (21% overall) had no flights from their chosen airport been available when they made their travel arrangements, over six in ten (61%) would have chosen to take the train. This links in to the finding earlier that 68% of those who could have used another means of travel instead of flying could have used the train. Similar proportions at Glasgow and Edinburgh (31% and 25%) would have chosen to travel by car but a higher proportion of Edinburgh users (71%) than Glasgow users (54%) would have chosen rail.

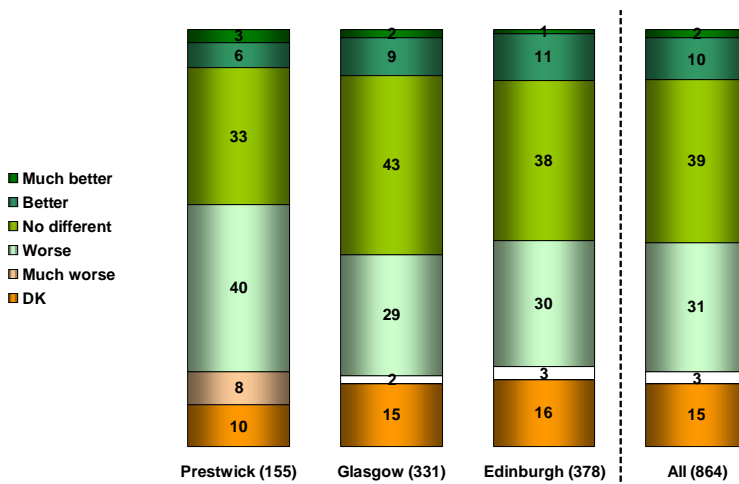
Alternative transport



Q30: What means of transport would you have used instead of flying?
 Base: All who would not have flown if flight had not been available (n=234)
 WEIGHTED

All who would have flown from a different airport or used another means of travel (39% overall) if their flight had not been available, were asked how this next best alternative would have compared with the flight they actually took. For 70% the alternative would be no different (39%) or worse (31%) in terms of the overall cost of the journey. Respondents at Prestwick, who are more price sensitive, are more likely to say that the overall cost of the journey using an alternative flight or means of travel would be worse (40%) or much worse (8%).

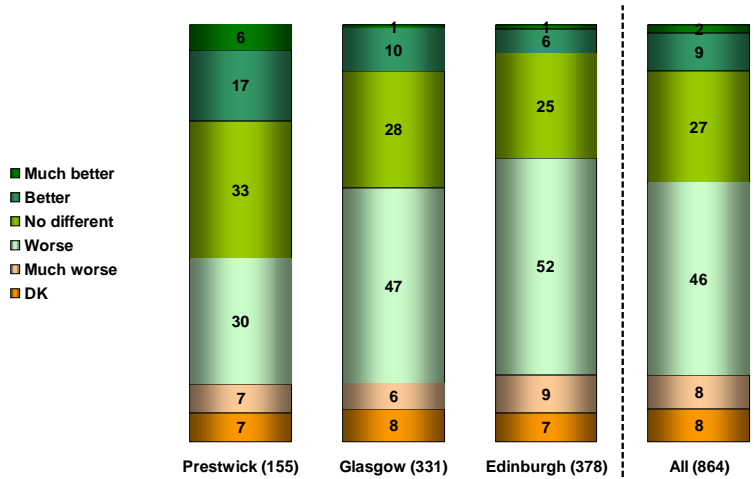
Opinion of alternative



Q31: Do you know whether this next best alternative would have been better, worse, or no different in terms of the overall cost?
 Base: All who would have flown from a different airport or not have flown if flight had not been available (n=864)

For over half (54%), the alternative journey would have been worse (46%) or much worse (8%) in terms of overall journey time. Respondents at Prestwick however, whom we know travel further and for longer to get to the airport, are less likely to say that the journey time for an alternative airport or means of travel is worse (30%) or much worse (7%). In fact, almost one quarter (23%) of respondents using Prestwick say that the alternative would have been better (17%) or much better (6%) in terms of the overall journey time.

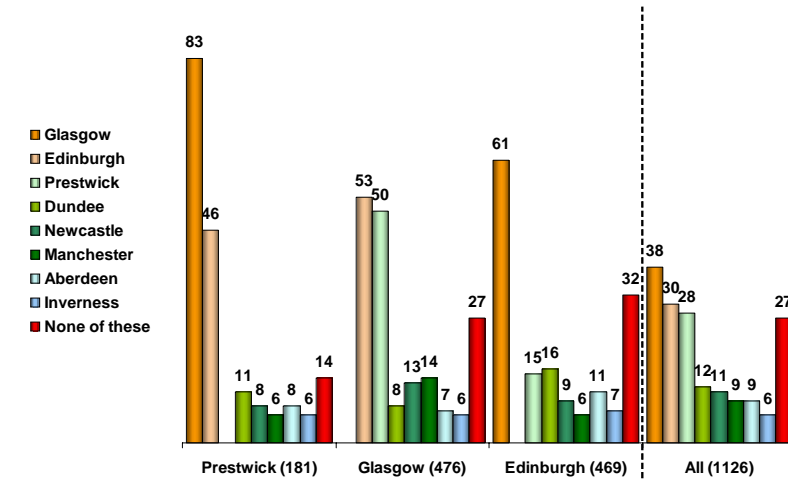
Opinion of alternative



Q32: Do you know whether this next best alternative would have been better, worse, or no different in terms of the overall journey time?
 Base: All who would have flown from a different airport or not have flown if flight had not been available (n=864)

When prompted as to whether each airport would have been considered as a realistic alternative, if their flight had been there at the same time and cost, 38% would have considered Glasgow, followed by similar proportions at Edinburgh (30%) and Prestwick (28%). Consideration of Prestwick is highest for those who used Glasgow airport (50%) and lowest for those who were using Edinburgh (15%). Prestwick respondents are most likely to consider Glasgow (83%). Over one quarter (27%) of respondents would not consider any other airports; this rises to 32% for Edinburgh respondents and dips to 14% for Prestwick respondents.

Consideration of alternative airports: prompted



Q35: I am going to read out a list of airports and I'd like you to tell me whether or not you would have seriously considered any as a realistic alternative, if your flight had been available there at the same time and the same cost. (Mentions over 5%)
Base: All (n=1126)

WEIGHTED

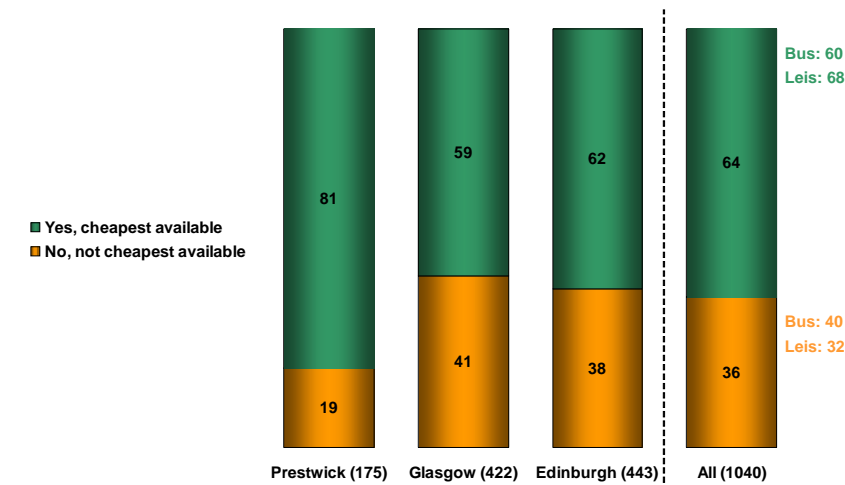
3.3. Price sensitivity

The final part of the research survey looked at price sensitivity, firstly focusing on the price paid for trips and then introducing hypothetical cost increases to determine what respondents would have done in each scenario.

3.3.1. Price paid

Nearly two-thirds (64%) travelled on the cheapest flight available. Prestwick respondents are more sensitive to price: 81% travelled on the cheapest flight available. Business respondents are more likely to have chosen to travel on a flight that was not the cheapest available (40%).

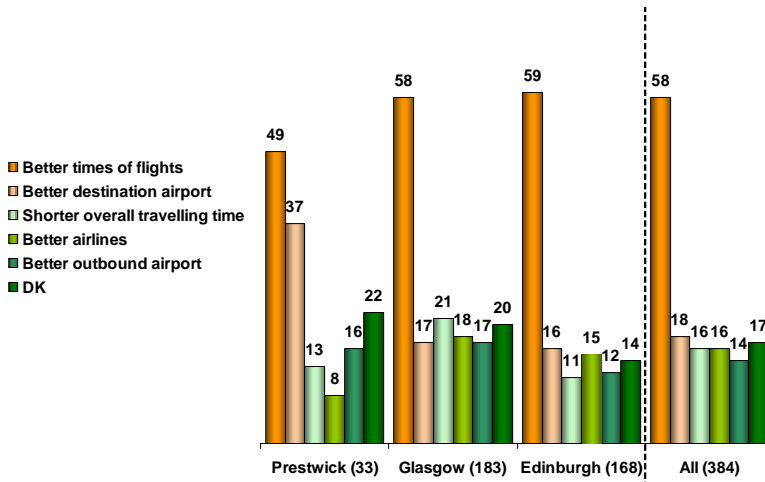
Flight pricing



Q15: Thinking about all the flights you could have taken, did you travel on the cheapest available?
Base: All (n=1040)

For those who did not travel on the cheapest flight, the time of the flight was the main reason (58%) for not choosing the cheapest available. Prestwick respondents gave more consideration to the destination and outbound airport (37% and 22% respectively).¹

Reasons for not choosing the cheapest flight

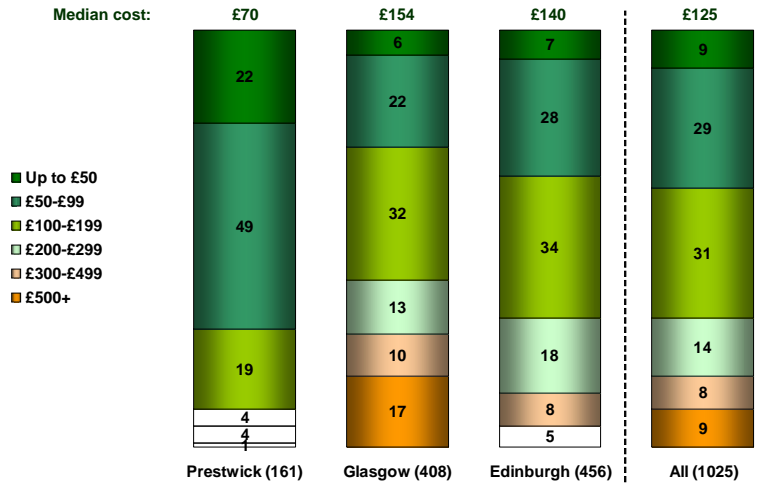


Q16: Why was the flight you took better than the cheapest one?
 Base: All not choosing the cheapest flight (n=384)
 WEIGHTED

The median airfare per party for outward and return journeys combined and including all taxes fees and surcharges was £125 for all those who booked their flight separately. Prestwick respondents pay a lot less for their flights than other respondents using Glasgow or Edinburgh: the median cost is half that of the other two airports (£70 compared to £154 and £140). Over two thirds (69%) overall paid less than £200 and over one third (38%) paid less than £100. 71% of Prestwick respondents paid less than £100 for their flights compared to 28% at Glasgow and 35% at Edinburgh.

¹ Caution: small sample size for Prestwick; results are indicative only.

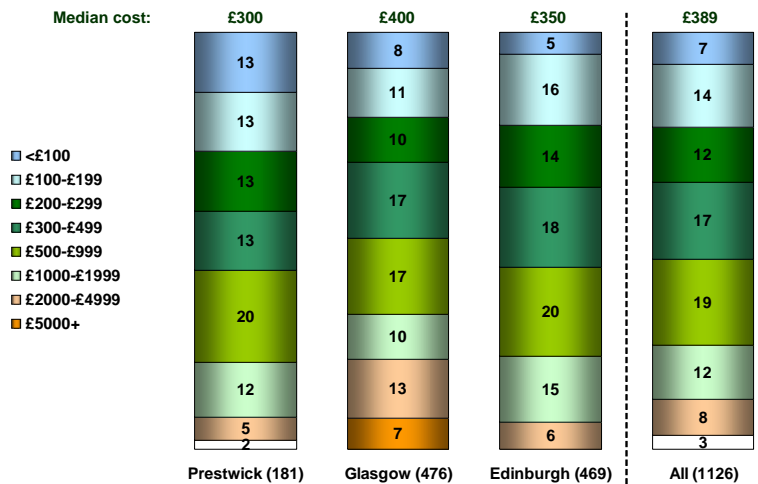
Flight cost



Q4aR: Approximately how much was the total airfare you paid for your outward and return journeys combined, including all taxes, fees and surcharges? Please give me the total price for your party rather than per person.
 Base: All who booked flight separately (n=1025)
 WEIGHTED

The median cost of the total trip, including all travel, accommodation and other expenditure per party was £389 overall. Again, Prestwick respondents spend less on their total trip: the median amount spent was £300. Glasgow respondents spent the most with a median of £400.

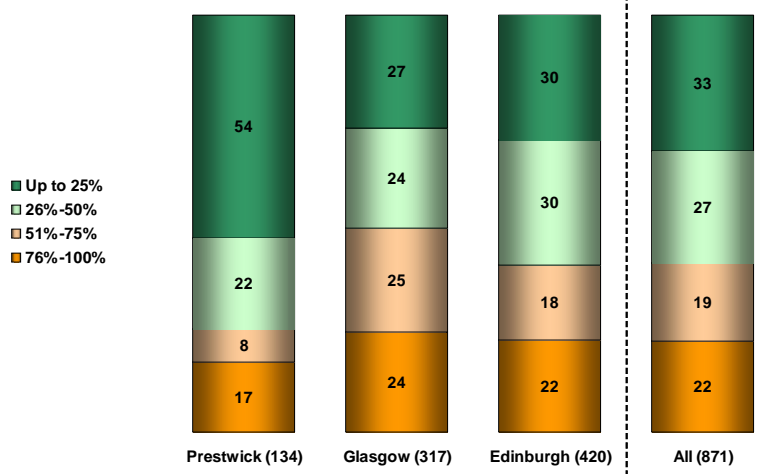
Total trip cost



Q36: Approximately, how much was the total costs of your trip, including all travel, accommodation and other expenditure for your whole party?
 Base: All (n=1126)
 WEIGHTED

The airfare was calculated as a proportion of the total trip for all those who booked their flight separately. At Prestwick, where the flights were significantly less than at the other two airports, the price paid for these flights makes up less than 25% of the total trip cost for over half (54%) of respondents. Unsurprisingly, the flights made up a larger proportion of the total spend on the trip for those on domestic flights or travelling for business purposes: the flights were at least half of the total trip cost for 45% of domestic flight respondents and 52% of business respondents.

Airfare as proportion of total trip



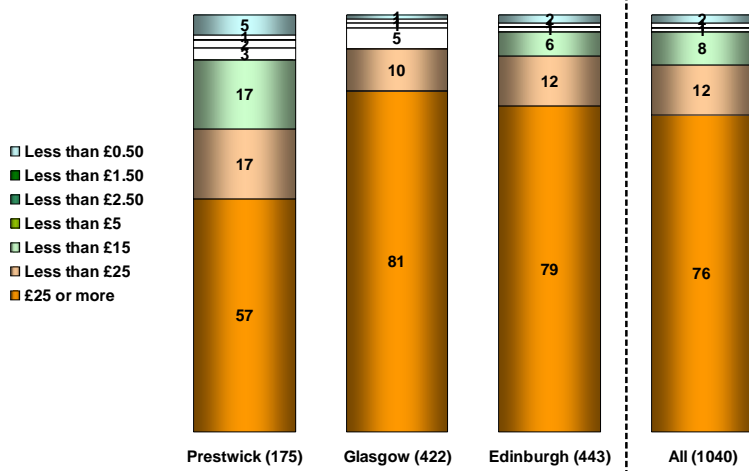
Q4aR/Q36: Airfare as proportion of total trip.
 Base: All who booked flight separately (n=871)
 WEIGHTED

3.3.2. Cost scenarios: willingness to pay

All respondents were asked a battery of questions to determine what they would have done if the price of the total fare per person, on all flights through the airport, had been increased. The intention of these questions was to identify the amount extra that they would have been willing to pay on the current return air fare per person. The increases, ranked in order of size, were: £0.50; £1.50; £2.50; £5.00; £15.00; and £25.00. However, naïve framing of willingness-to-pay questions can influence responses and so these price increases were presented out of sequence. Because of this, responses to individual items in the battery are less informative than the final amount that respondents would be willing to pay.

The final results were: 2% would not have been prepared to pay £0.50; 3% would not have paid £1.50; 3% would not have paid £2.50; 4% would not have paid £5; 12% would not have paid £15; 24% would not have paid £25; but just over three quarters (76%) of respondents would have still chosen the same airport if the price on all flights through that airport had increased by £25. However, at Prestwick, only 57% of respondents would pay £25 or more and 10% would not have paid £5.

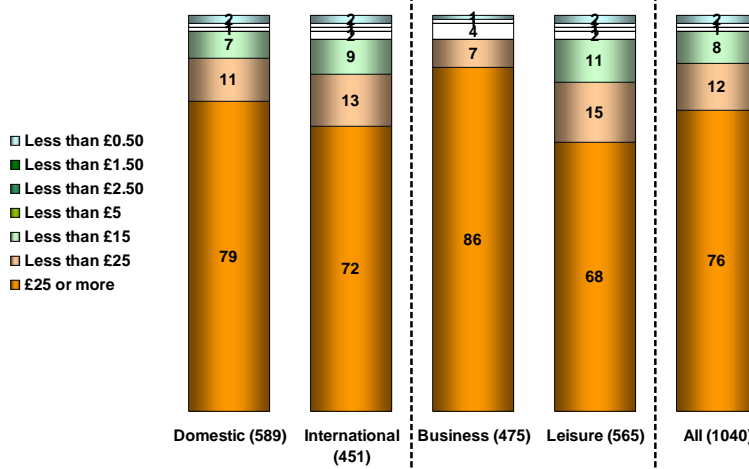
Willingness to pay



Q37a-f: Suppose the price of the total airfare on all flights through the airport had been increased by £ per person. In this scenario, what would you have done?
Base: All (n=1040)

Business respondents are much more likely (86%) to pay £25 or more compared to leisure respondents (68%).

Willingness to pay



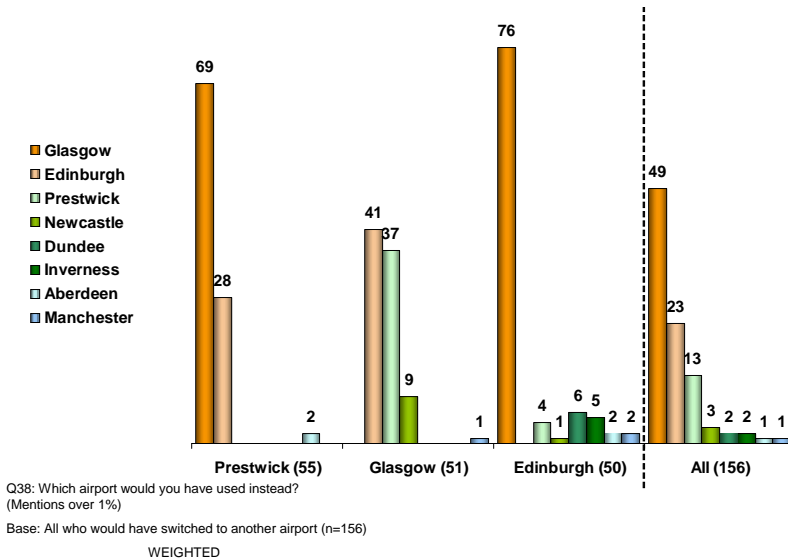
Q37a-f: Suppose the price of the total airfare on all flights through the airport had been increased by £ per person. In this scenario, what would you have done?
Base: All (n=1040)

Respondents were also asked whether they had been comparing the price increase with the airfare or the total cost of the trip: 57% said it was the airfare and 30% said it was the cost of the trip; 6% said it was the package price and 7% did not know.

Among those who were not prepared to pay £25, 15% would have switched to another airport, 6% to another means of transport and 3% would not have travelled at all.

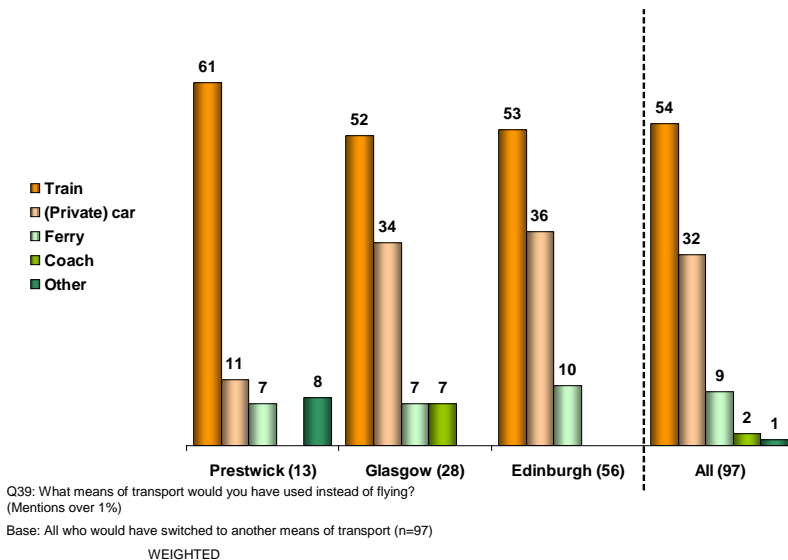
Of those who say they would switch to an alternative airport (15% overall) if the price increased, half (49%) would switch to Glasgow airport. Although sample sizes are relatively small for each airport, the findings mirror those seen earlier regarding consideration of alternative airports. ²

Alternative airport for switchers



Of those who would switch to an alternative means of transport (6% overall) if the price increased, over half (54%) would switch to travelling by train or private car. Again, despite small base sizes, this mirrors the findings seen earlier amongst those who are not price sensitive. ³

Alternative mode of transport for switchers



² Caution: small sample sizes across the individual airports; results are indicative only.

³ Caution: small sample sizes across the individual airports; results are indicative only.

4. Appendix: Summary of questions

CODE	QUESTION	BASE RESPONDING
1	To what extent were you involved in that decision? [to use airport]	All respondents
2	Was your flight ...? [charter, scheduled, business etc]	All respondents
3	Which region did you set out from to get to [the] airport on that day? Which region did you travel on to when you left [the] airport on that day?	All respondents
4	Can you give me the nearest town or city of the place you set out from / to?	All who started / ended journey in the UK
5	Can you give me the first part of the postcode district of the place you set out from / to?	All who started / ended journey in the UK
6	What was the final destination airport you flew to? At what airport did you start your journey?	All respondents
7	Was your flight direct or did you have to change planes in or outside the UK?	All respondents
8	Which airport did you change planes at?	All who changed planes in the UK
9	Which forms of transport did you use to get to [the] airport on that day? Which forms of transport did you use to leave [the] airport on that day?	All respondents
10a	Roughly, how far did you travel in miles to get to [the] airport on that day? Roughly, how far did you travel in miles to get to your final destination when you left [the] airport on that day?	All who did not change planes in the Scottish airport
10b1/2	Roughly, how long did it take you to get to [the] airport on that day? Roughly, how long did it take you to get to get to your final destination when you left [the] airport on that day?	All who did not change planes in the Scottish airport
11	Where did you fly from to get to [the] airport? Where did you travel to once you continued your journey by air from [the] airport?	All who did change planes in the Scottish airport
12	How was your trip booked?	All respondents
13	Did you shop around before finally deciding on your flight?	All respondents
14	What sources of information did you use to shop around?	All who shopped around
15	Thinking about all the flights you could have taken, did you travel on the cheapest available?	All respondents
16	Why was the flight you took better than the cheapest one?	All who did not take the cheapest flight
17	How long before travelling was your flight booked?	All respondents
18	What did you think about first when planning your journey [destination or airport]?	All respondents departing on the outbound leg or arriving on the return leg
19	Over the past two years, have you always used [this] airport when flying on [business / leisure] trips?	All respondents departing on the outbound leg or arriving on the return leg
20A-E	Please tell me how important [each of these factors] were to you when	All respondents

	choosing and booking a flight.	
21	Did you have a choice of airports when planning this journey? That is, could you have realistically used a different airport than [that] airport?	All respondents
22	Which other airports, if any, did you consider?	All who had a choice of airport
23	Why was that [i.e. no choice of airport]?	All who did not have a choice of airport /consider other airports
24	Would you have been able realistically to use another means of travel instead of flying?	All respondents
25	What mode(s) of transport would you have been able to use?	All who could have used another means of travel instead of flying
26	What were the main reasons you chose to fly, rather than use an alternative mode of transport?	All who could have used another means of travel instead of flying
27	Can you give me the reasons why you used [this] airport, rather than another airport?	All respondents
28	If no flights from [this] airport had been available when you made your travel arrangements what would you have done instead?	All respondents
29	Which airport would you have used instead?	All who would have flown from a different airport if flight had not been available from airport used
30	What means of transport would you have used instead of flying?	All who would have not flown and travelled in some other way if flight had not been available from airport used
31	Do you know whether this next best alternative would have been better, worse, or no different in terms of the overall cost of the journey?	All who would have flown from a different airport or not flown and travelled in some other way if flight had not been available from airport used
32	Do you know whether this next-best alternative would have been better, worse, or no different in terms of the overall journey time?	All who would have flown from a different airport or not flown and travelled in some other way if flight had not been available from airport used
33	What did you like best about your experience of using [the] airport itself?	All respondents
34	What did you dislike most about your experience of using [the] airport itself?	All respondents
35	I am going to read out a list of airports, and I'd like you to tell me whether or not you would have seriously considered any as a realistic alternative to [this] airport, if your flight had been available there at the same time and the same cost.	All respondents
36	When you were invited to take part in the survey, you told us that you spent £[...] on the total cost of your [flights / package] for your party. Approximately how much was the total cost of your trip, including all travel, accommodation and other expenditure for your party (rather than per person)?	All respondents
37a	Suppose the price of the total fare on all flights through [the] airport had been increased by £25 per person. In this scenario, what would you have done?	All respondents
37b	Suppose the price of the total fare on all flights through [the] airport had	All who would have switched or not travelled at £25 increase per

	been increased by 50 pence per person. In this scenario, what would you have done?	person
37c	Suppose the price of the total fare on all flights through [the] airport had been increased by £15 per person. In this scenario, what would you have done?	All who would have still chosen the airport at 50p increase per person
37d	Suppose the price of the total fare on all flights through [the] airport had been increased by £1.50 per person. In this scenario, what would you have done?	All who would have switched or not travelled at £15 increase per person
37e	Suppose the price of the total fare on all flights through [the] airport had been increased by £5 per person. In this scenario, what would you have done?	All who would have still chosen the airport at £1.50 increase per person
37f	Suppose the price of the total fare on all flights through [the] airport had been increased by £2.50 per person. In this scenario, what would you have done?	All who would have switched or not travelled at £5 increase per person
38	Which airport would you have used instead?	All who would have switched to another airport
39	What means of transport would you have used instead of flying?	All who would have switched to another means of transport
40	When you told me what you would do if prices increased, were you thinking about the price increases in relation to the [airfare / package price] or in relation to the total cost of the trip?	All respondents
41	Total annual household income before tax.	All respondents

QUESTIONS AND INFORMATION RECORDED AT RECRUITMENT

Gender	Gender of respondent	All respondents
Airport	Airport where recruitment interview took place	All respondents
Location	Airport (arrivals or departures) where recruitment interview took place	All respondents
Q2C_R	Which of these best describes how your flight was booked?	All respondents
Q4A_R	Approximately how much was the total airfare you paid for your outward and return journeys combined? Please give me the total price for your party, rather than per person.	All who booked flight separately
Q4B_R	Approximately how much was the overall cost of your package deal including all travel and accommodation? Please give me the total price for your party, rather than per person.	All who booked flight as part of package
Q5A_R	Is the flight ... a domestic or international flight?	All respondents
Q5B_R	Is this flight the outward journey, or ... return journey of your trip?	All respondents
Q6_R	Which of these best describes the <u>primary</u> purpose of your journey? [business or leisure]	All respondents
Q7_R	Which is your main country of residence?	All respondents
Q8_R	Are you travelling alone or with others?	All respondents
Q9A_R	How many people aged 16 or older are in your party, including yourself?	All travelling with others
Q9B_R	How many children aged 15 or younger are in your party, including yourself?	All travelling with others