



Dynamic surveying for aviation: Business passengers

This release presents the results of a set of questions which were dynamically added to the Civil Aviation Authority (CAA) Departing Passenger Survey for the first quarter of 2018. This set of questions focused specifically on business passengers, the reason for their travel and the activities that they might conduct.

Executive Summary: Headline findings

Business locations

- From the business passengers surveyed, around three-quarters were travelling to/from an international destination, with the rest travelling solely within the UK domestically. International destinations were most likely to be within the EU, accounting for almost two-thirds of destinations. Unlike other airports, Heathrow saw over half of its international passengers travel to extra-EU destinations.

Business travel

- The majority of business passengers surveyed were found to be travelling alone and travelling on an economy class ticket. Where a business passenger was not travelling alone, there were most likely to have been travelling with someone else from the same organisation. Those travelling on a business class ticket were generally found to be passengers with job titles including the words 'chief', 'director' or 'manager'.
- The average (median) trip length reported by business passengers varied between 2 and 4 days depending on the airport. Passengers travelling to international destinations were almost always visiting a single country.

Business activity

- The most common activity for business passengers was to attend a meeting, a trend that was consistent across all airports surveyed regardless of the origin/destination of the passenger. Business passengers attending a meeting were most likely to be meeting with people from their own organisation.
- Conducting business trips by air was a frequent occurrence with just over half of business passengers surveyed stating that they conduct business trips by air 'several times a year'.
- When posed with a scenario where it was not possible for the passenger to fly to their destination involving their current flight, around four in five would still choose to travel via air, with a preference for choosing a different departure airport rather than changing their destination.

About the survey

- The departing passenger survey is a survey that is undertaken to **obtain information about air travellers** and the determinants of the travel market. The surveys have included questions on journey purpose, final and intermediate surface origins/destinations, means of transport to and from airports, route flown, country of residence and purpose of travel.
- Surveys run on an annual basis, with interview shifts spread as evenly as practical throughout the year. A record of the flights sampled is regularly monitored to ensure that where possible **all routes, and in most cases all flight numbers, are covered regularly**.
- An interview usually lasts around 5–7 minutes, and involves around 30 questions being asked. Survey **interviews take place at airport departure gates** with information collected from passengers by a skilled interviewing field force. The **interviews are then weighted to actual two-way traffic levels** under the assumption that over the period, departing and arriving passengers will show the same characteristics.

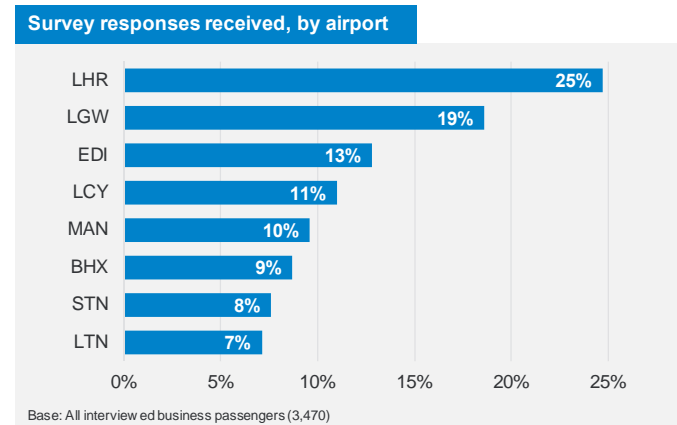
Sampling criteria

- This set of questions was applicable to any UK or foreign resident passenger that reported their **main purpose of travel as “business”**.
- Passengers that were considered as international-international transfer passengers were excluded. That is, any passengers whose ultimate origin or destination was not in the UK was not chosen to be interviewed for this set of questions.
- The table on the right provides an example of air journeys that would meet the sampling criteria.

Air Route In	Survey Airport	Air Route Out
<input checked="" type="checkbox"/>	Heathrow	→ Domestic or International
<input checked="" type="checkbox"/> Domestic (e.g. Leeds Bradford)	→ Heathrow	→ Domestic (e.g. Edinburgh)
<input checked="" type="checkbox"/> Domestic (e.g. Manchester)	→ Heathrow	→ International (e.g. New York JFK)
<input checked="" type="checkbox"/> International (e.g. New York JFK)	→ Heathrow	→ Domestic (e.g. Edinburgh)
<input checked="" type="checkbox"/> International (e.g. New York JFK)	→ Heathrow	→ International (e.g. Dubai)

Survey airports

- This set of questions was implemented at 8 UK airports: **Heathrow (LHR)**, **Gatwick (LGW)**, **Manchester (MAN)**, **Stansted (STN)**, **Luton (LTN)**, **Edinburgh (EDI)**, **Birmingham (BHX)** and **London City (LCY)**. These airports capture the vast majority of business passenger traffic at UK airports.



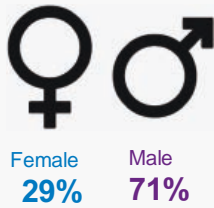
Survey responses

- The passenger survey already has a well established sampling methodology which follows a stratified sampling design (stratified by carrier, route and quarter). A total of **3,470 interview responses** were received from a representative sample of passengers between 2nd January 2018 and 31st March 2018.
- It should be noted that this survey is posed to air passengers at the **departure** stage of an air journey from a UK airport. As a result passengers surveyed will typically be one of the following scenarios:
 - passengers embarking on a business trip and thus travelling to the destination required
 - passengers concluding a business trip and thus returning to their main country of residence
 - passengers that are still en-route and have not yet reached their final destination as part of a business trip (e.g. making a connection to reach another airport)

Sample profile

Gender

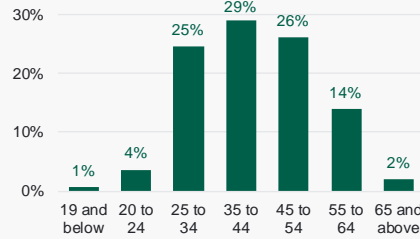
Gender of passengers surveyed



Base All interviewed business passengers (3,470).

Age

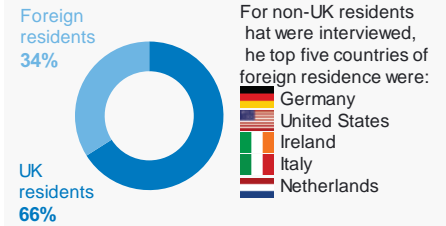
Age groups of passengers surveyed



Base All interviewed business passengers (3,470). Q. Which of these age groups do you come into? (2,927 responses).

Country of residence

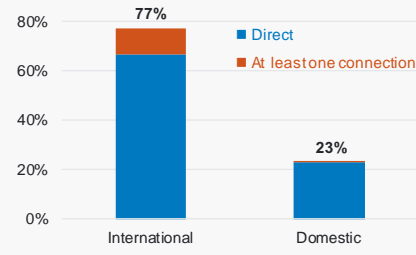
Country of residence of passengers surveyed



Base All interviewed business passengers (3,470). Q. In which country have you been living for most of the last 12 months?

Routes

Routes taken by business passengers surveyed



These passengers were either destined for or originated from and international country

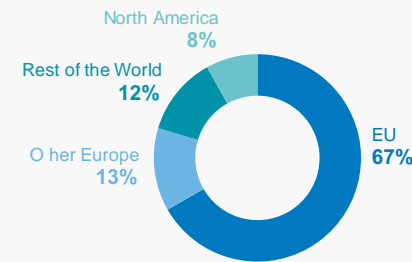
These passengers travelled solely between destinations within the UK

- ▶ Over three-quarters (77%) of passengers were originating from/travelling to an international destination. A large proportion of these passengers were making direct journeys, with about 13% making at least once connection on route.
- ▶ Around 23% of passengers started and ended their business journey in the UK, with a vast majority of them travelling on direct air routes.

Base All interviewed business passengers (3,470).

International passengers

Origin/destination of international passengers surveyed



- ▶ Almost two-thirds (67%) of international passengers were originating from/travelling to other EU countries. The most popular choice of airports were Amsterdam-Schiphol, Dublin, Frankfurt, Paris CDG, Dusseldorf and Munich.
- ▶ The most common destination airports for those travelling to/from non-EU countries for business purposes were Geneva, Zurich and New York JFK.

Base Business passengers whose final destination or origin was an international location (2,634).

Domestic passengers

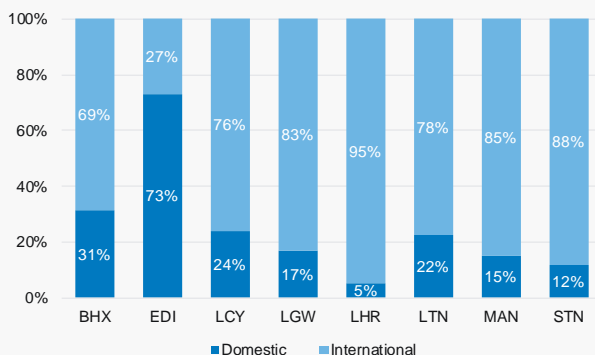
Origin/destination of domestic passengers surveyed

- ▶ Almost all passengers travelling domestically were doing so on direct air routes, highlighting the strong preference of direct air connectivity for business passengers.
- ▶ Almost half of these passengers were travelling on routes between Scotland and the rest of England. The most common routes of surveyed passengers were:
 - Edinburgh – London City
 - Edinburgh – Gatwick
 - Edinburgh – Heathrow
 - Edinburgh – Birmingham
 - Belfast International – Gatwick

Base Business passengers whose origin and final destination was a UK location (836).

Routes at airports

Routes taken by business passengers surveyed, by airport

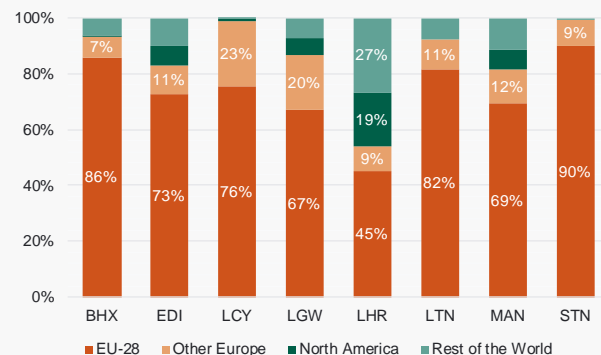


- ▶ Business passengers at most airports surveyed were travelling to/from an international destination. This is with the exception of Edinburgh that saw just under three-quarters (73%) of passengers travelling to/from another UK destination.

Base All interviewed business passengers (3,470). The classification of destinations into domestic and international have been based on the origin or final destination of the passenger.

International passengers at airports

Origin/destination of international passengers surveyed, by airport

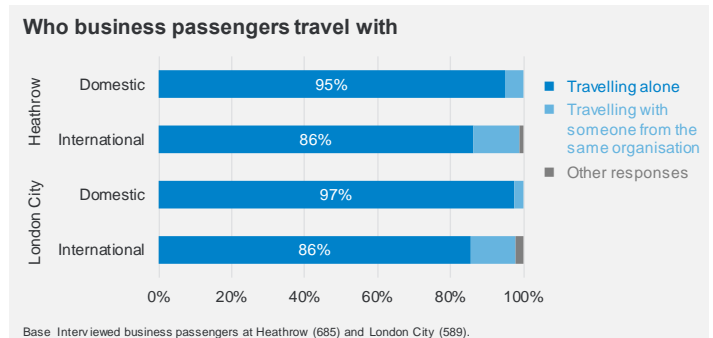
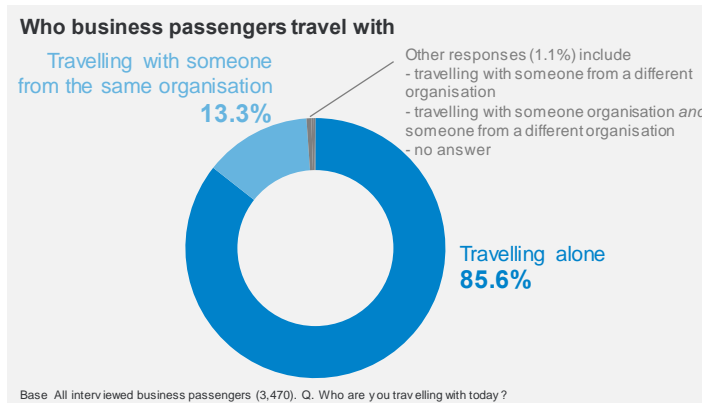


- ▶ On the whole, international business passengers surveyed were travelling to/from other EU countries. Notably, Heathrow differed when compared to other airports surveyed, with more passengers travelling to extra-EU countries (55%) than EU countries (45%).
- ▶ The proportion of passengers travelling to/from 'Other Europe' destination is the highest at London City due to the high frequency of travel to destinations such as Zurich, Geneva and Jersey.

Base Business passengers whose final destination or origin was an international location (2,634).

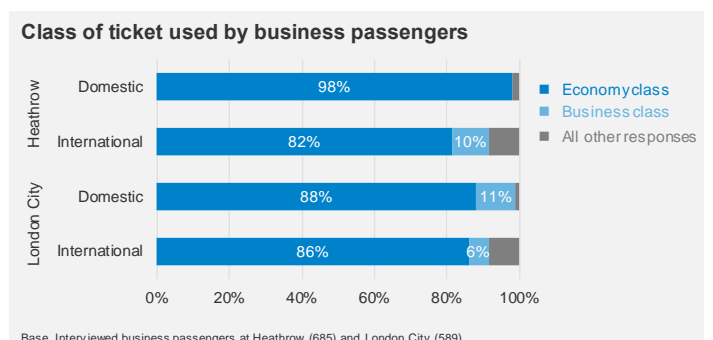
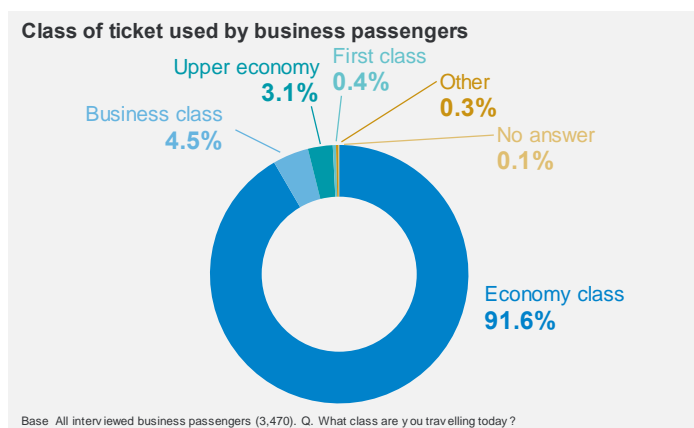
Who do business passengers travel with?

- The majority (around 86%) of business passengers were found to be travelling alone, a picture which was consistent across all the airports surveyed.
- Where a business passenger was not travelling alone, there were most likely to have been travelling with someone else from the same organisation. Very few passengers were found to be travelling with individuals from an external organisation.
- This trend is also evident when observing passengers travelling to/from an international destination. There was a tendency for a slightly higher proportion of passengers travelling domestically to travel alone, particularly at London City and Heathrow where the proportion of domestic passengers travelling alone was 97% and 95% respectively.



What class do business passengers travel?

- Most business passengers (just over 90%) were found to be travelling with an economy class ticket, but there were notable variations between the airports surveyed.
- In particular, almost all passengers at Luton (99%) were travelling with an economy class ticket, whilst Heathrow and London City attracted a much higher proportion of passengers travelling on either a business class or premium economy ticket.
- Interestingly, most of the business class ticket passengers at London City were travelling domestically (62%), whilst practically all of the business class ticket passengers at Heathrow were found to be travelling internationally.
- Economy class ticket holders were flying with a mixture of airlines, using full service carriers (British Airways, Lufthansa, KLM) and low cost carriers (easyJet, Ryanair, Wizz Air) in roughly equal amounts.
- For passengers travelling on a business class ticket, about 30% were from financial and insurance industries, whilst job titles including the words “Director”, “Chief”, “Manager” and “Senior” featured heavily.

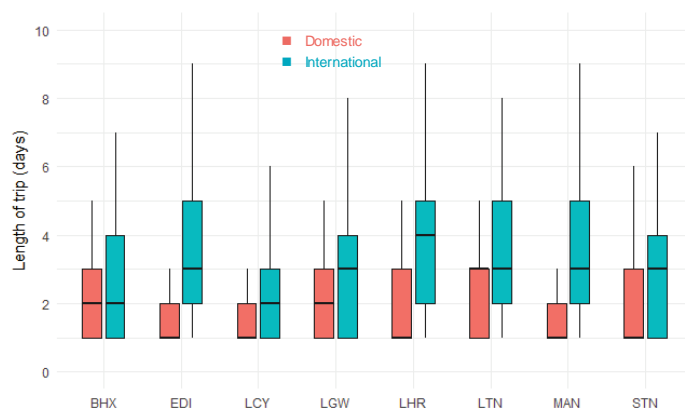
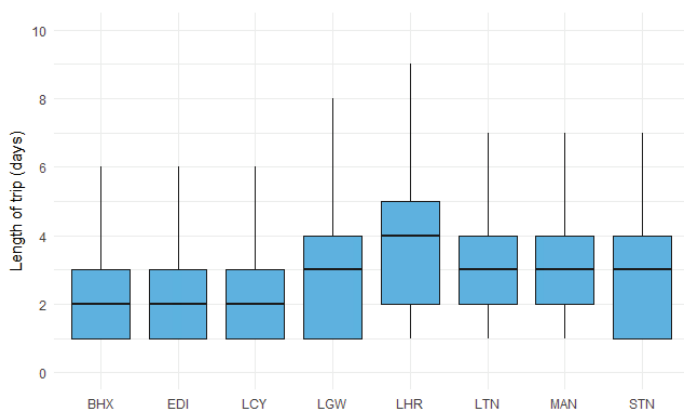


How long do business passengers travel for and how many countries do they visit?

- The average length of trip reported by business passengers varied between 2 and 4 days depending on the airport, with the vast majority of international passengers visiting only one country.

Base: business passengers travelling to/from an international location providing a valid response (2,526). Q. How many different countries are you conducting business in as part of this trip?

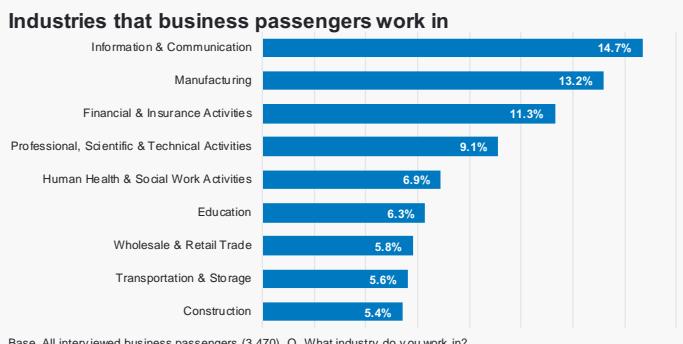
- Passengers travelling to/from an international location were more likely to be on a longer trip, notably at Heathrow where the average trip length for domestic and international passengers was 1 and 4 days respectively.
- Comparatively more international passengers at Heathrow (45%), Manchester (19%) and Edinburgh (17%) were found to be travelling to/from an extra-Europe location which inherently requires longer travel times. This potentially increases the trip length reported at these airport when compared to other airports that have much a much smaller proportion of international passengers travelling outside of Europe.



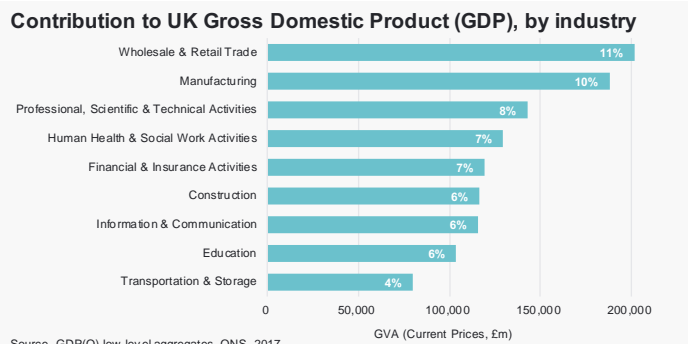
Base: A I interviewed business passengers providing a valid response (3,384) domestic (809) and international (2,575). Q. How long is your business trip (in days)? See technical information for guidance on how to interpret these charts.

What industries do business passengers work in?

- Most passengers surveyed were from information and communication, manufacturing and financial and insurance industries, which in combination made up about 40% of all business passengers.
- Industries which accounted for at least 5% of passengers across all airports surveyed generally represented the industries that generate the highest contribution to the UK economy.
- There were some noticeable differences in the make-up of passengers depending on the region the airport served. In particular:
 - Birmingham observed more business passengers from manufacturing (25.4%) when compared to other industries.
 - Manchester also observed more business passengers from manufacturing industries (24.8%), but also experienced many more passenger from electricity/gas/steam supply industries (7.9%).
 - Unsurprisingly, just under a third (31.2%) of business passengers at London City were from financial and insurance industries given its close proximity to the financial centre of London.



Base: All interviewed business passengers (3,470). Q. What industry do you work in?

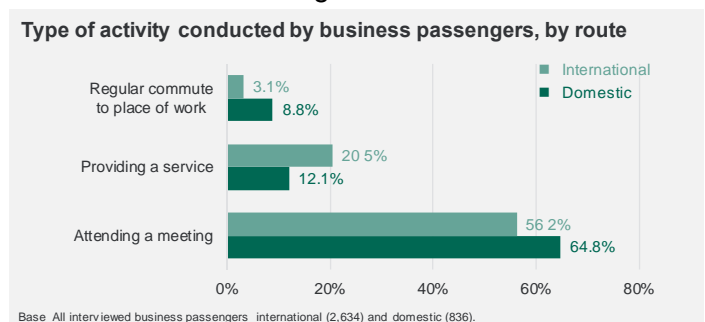
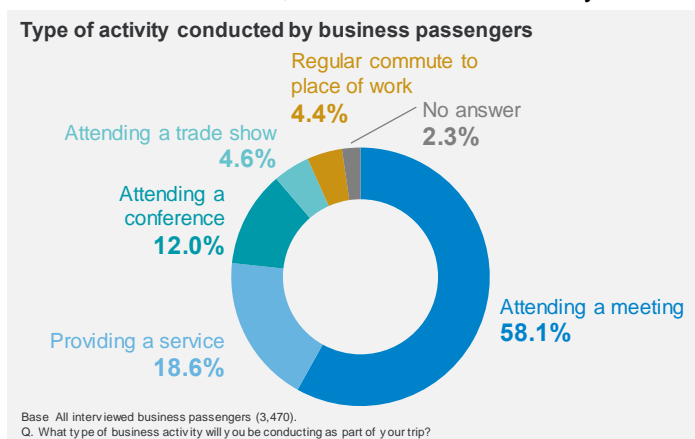


Source: GDP(O) low level aggregates, ONS, 2017

What type of activity do business passengers conduct?

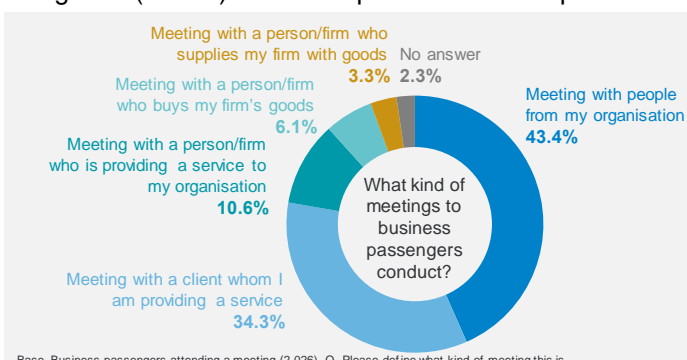
- The most common activity for business passengers was to attend a meeting, a trend that was consistent across all airports surveyed regardless of the origin/destination of the passenger.
- Variations were observed in the proportion of passengers reporting other types of business activity dependent on whether they were travelling to/from a domestic or international location.
- In particular, domestic passengers were much more likely to cite “regular commute to place of work” as the reason for their travel, accounting for 12.2% of domestic passengers at Edinburgh.
- Business passengers more commonly cited “providing a service” as their business activity when travelling internationally than when travelling domestically.
- Patterns observed from this survey support mobility research (Urry, John. “Mobility and proximity.” Sociology 36.2 (2002): 255-274) which advocates people travel for three reasons:
 - to meet other people (“face-to-face”)
 - to visit a particular place (“face-the-space”)
 - to be part of the a live event (“face-the-moment”)

In a business context, most travel is driven by the need for face-to-face meetings.



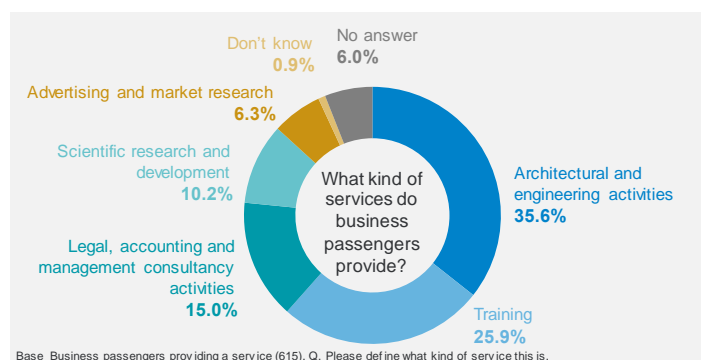
Attending a meeting

- Business passengers attending a meeting were most likely to be meeting with people from their own organisation (43.4%).
- A slightly higher proportion of business passengers at London City were attending meetings regarding the provision of services to their organisation (16.6%),
- Birmingham, which has a larger proportion of its business passengers coming from manufacturing industries, also saw a higher proportion of passengers attending meetings regarding the sale or purchase of goods (16.7%) when compared to other airports.



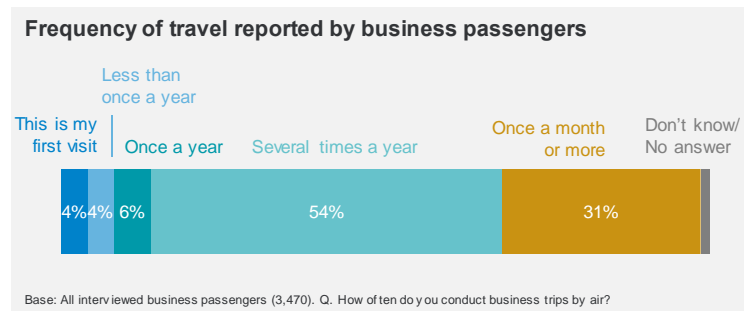
Providing a service

- Where a business passenger was providing a service (to other business users or private individuals) the activities involved may often require a high degree of specialised knowledge and skills that need to be made available to clients.
- These activities, which can be classified broadly as **professional, scientific and technical activities**, is prevalent in the UK and accounts for the largest share of EU-28 value added (26.2%) within the professional, scientific and technical services sector in 2014.



How often do business passengers conduct trips by air?

- Conducting **business trips by air was a frequent occurrence amongst passengers** and this pattern was evident across business passengers at all the airports surveyed.
- Just over half (54.1%) of business passengers surveyed stated that they conduct business trips by air 'several times a year' whilst a further 30% travelled by air 'once a month or more' highlighting the high frequency of air travel conducted by some business users.
- Of the passengers that cited that they conduct business trips by air frequently, passengers were typically concentrated from the following four industries which accounted for around 50% of business passengers:
 - information and communication
 - manufacturing
 - financial and insurance activities
 - professional, scientific and technical activities

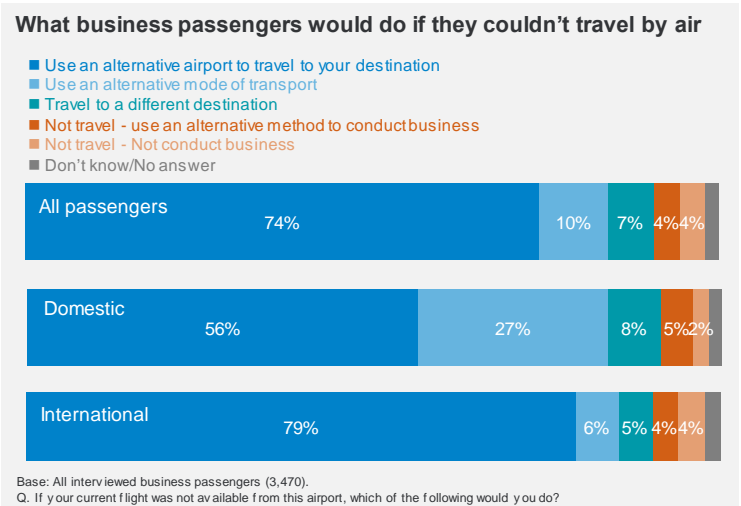


What would business passengers do if they couldn't travel by air?

- When posed with a scenario where it was not possible for the passenger to fly to their destination involving their current flight, **the vast majority (80.4%) of business passengers would still choose to travel via air**, with a preference for choosing a different departure airport rather than changing destination.
- A much larger proportion of passengers surveyed at Edinburgh stated they would use 'an alternative mode of transport' when compared to other airports – this can be explained by the large number of domestic travellers at Edinburgh where rail links perhaps provide the best feasible alternative. On the whole, domestic passengers were also more likely to state this option (27.5%).
- Only a small proportion of passengers (3.9%) stated that they would not travel but instead conduct their business via an alternative method (e.g. teleconferencing).

- Literature provides a number of theories as to why business passengers prefer to travel rather than use virtual alternatives:

- Interviews with business travellers show that negotiations, financial deals, and business development require a large degree of interpersonal contact and physical proximity due to the need to establish relationships of trust. (Aguilera, Anne, and Laurent Proulhac. "Socio-occupational and geographical determinants of the frequency of long-distance business travel in France." *Journal of Transport Geography* 43 (2015): 28-35)
- For example, face-to-face contact is considered vital especially in the early stages of a partner or a client relationship, when there are high levels of uncertainty on both sides. (Larsen, Jonas, Kay W. Axhausen, and John Urry. "Geographies of social networks: meetings, travel and communications." *Mobilities* 1.2 (2006): 261-283)



Technical information

- **Survey weighting:** Unless otherwise stated, the figures and analysis presented in this document are based on the weighted survey records. Further details regarding the methodology employed to apply weighting to the passenger survey are outlined by the [Civil Aviation Authority \(CAA\)](#).
- **Assumptions:** It is assumed that the same passenger will not be surveyed twice at different airports throughout an individual air journey. Such occurrences would only occur on passenger journeys where a connecting flight is being made at more than more of the airports surveyed as part of this survey module, and thus allowing an opportunity to be interviewed at a second airport on a departing flight. It should be noted that such instances are not likely to occur in practice.
- **Representation:** The passenger survey aims to interview a cross-section of passengers, however sometimes local airport and airline procedures can cause particular challenges. A noticeable example relating to business passengers is where a business class ticket holder chooses to wait in a separate holding area on departure (e.g. a restricted access business lounge) where survey interviewers are not permitted. This often means that interviewers can only feasibly conduct a short, core interview, in the few moments when the passenger becomes 'visible' prior to boarding the aircraft.

The CAA closely monitor these sampling challenges and actively share with airport authorities any concerns where there is a belief that the representative nature of the sample is compromised. As a result, this issue has been deemed not to affect the representativeness of results relating to the type of ticket that business passengers travel with.

- **Percentages:** Percentages quoted in the text and charts have been rounded to the nearest digit appropriately and so, in some cases, there may be an apparent discrepancy between the sum of the constituent items and the totals shown.
- **Interpreting box plots:** these plots are used to show overall patterns of response for a group.
 1. The line in the middle of the rectangle is the median (average) and marks the mid-point of the data. Half the responses are greater than or equal to this value and half are less.
 2. The rectangle shows the spread of the length of trips reported for the middle 50%.
 3. The two lines that extend to the top and bottom of each rectangle (where applicable) indicate the spread of trip lengths reported by passengers.

