Prospect member survey: the market for air travel in the UK and attitudes to it

To inform the development of our policy, we invited all members to complete an on-line questionnaire on the aviation industry in late February 2015. We had responses from no fewer than 3,500 members, of which some 10% worked in aviation. Inevitably, members in the aviation sector were more likely to respond than those in other industries – but the fact that 90% of respondents work in other sectors means we can be fairly confident that the survey reflects to views of members generally. The largest group of respondents (23% of the total) work in civil and public services, followed by energy (15%) and communications, media and digital (14%). There was also a substantial contribution from members who were retired. Thirty per cent of our respondents lived in London and the south-east, but we had a number of contributions from members in all the nations and regions of the UK, as well as overseas.

Use of aviation

Prospect members are, relatively speaking, **frequent flyers**. In contrast to the Airports Commission's assumption that one-half of the British population had travelled by air in the previous twelve months,[1] we found that just 13% of our members do not usually fly at all during the course of a year (if we look at those who are not retired, this figure reduces slightly to 12%). 23% of members usually fly just once, while 46% fly between two and five times and 11% between six and 10 times. Seven per cent of members usually fly more than 10 times per year – broadly, a minimum of around once per month.

In contrast to the oft-quoted figure (drawn from passenger survey data) that 15% of flyers are responsible for 70% of flights, we cannot reproduce that figure in respect of Prospect members, despite them being frequent flyers: our top-flying 17% of members are, instead, responsible for just over 50% of flights.[2] This is a figure which is high and disproportionate enough – but it is, of course, nowhere near as dramatic.

67% of members live less than one hour from their nearest airport, and a further 30% live 1-2 hours away; but for 45% of members their nearest airport is not the one from which they usually fly, suggesting a certain degree of unmet demand at the most local level, although clearly this is complicated by the routes which are offered at such airports (and, of course, the conditions). For 12% of members, the journey time to the airport from which they usually fly is three hours and for 5% it is longer than this.

Over three-quarters of Prospect members (77%) usually travel by car to the airport from which they usually fly (although for 4% the journey also involves some form of public transport, so 73% drive direct to the airport); while 13% travel by train, 6% by bus and a little over 1% by train and bus.

It is worth pointing out that this pattern is the reverse of what one would hope for on environmental grounds. Three-quarters of members travelling by car is not unsurprising –

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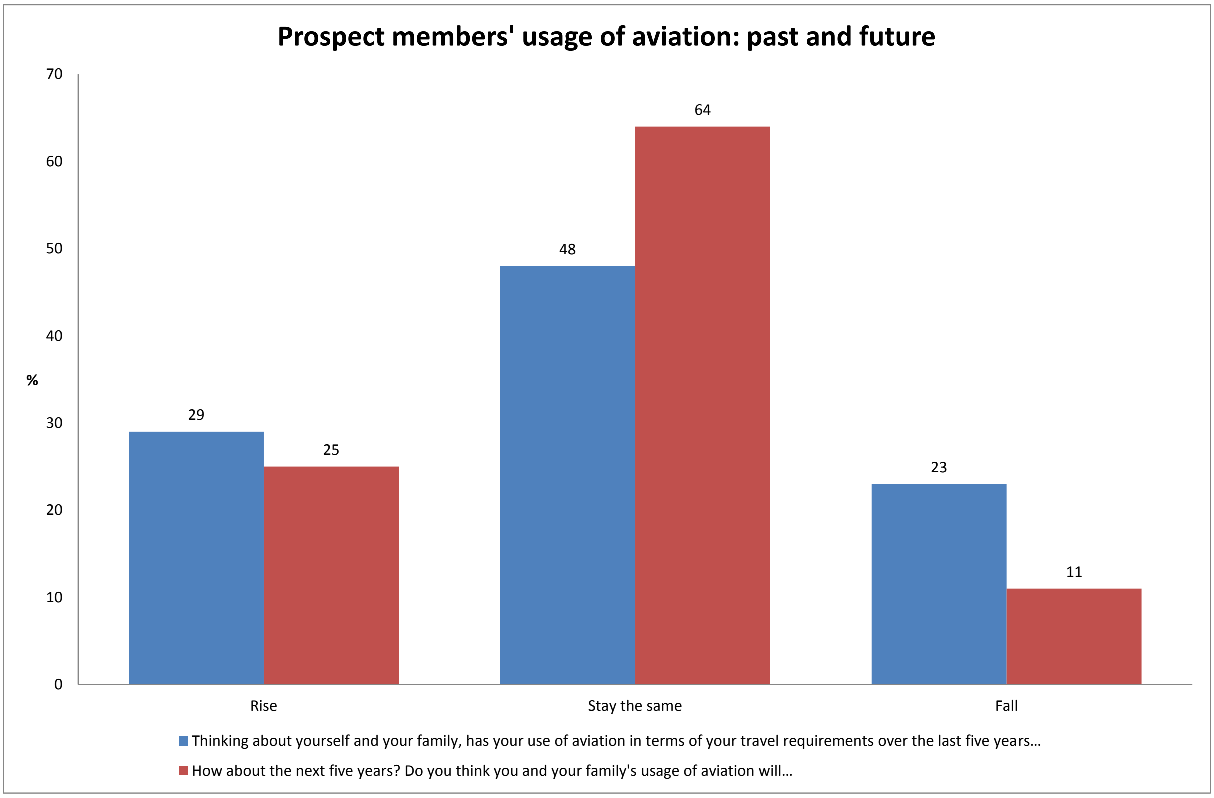
[1] A figure on the basis of which the Commission finds a rare common currency with environmental campaigners opposed to airport expansion.

[2] There is some level of imprecision here since our questionnaire grouped numbers of flights together rather than asking respondents for a particular number.

and Prospect members are likely to be little different to the average in this respect – but it is a disappointing reflection of the UK's **failure fully to integrate public transport**. Public policy has a substantial way to go when it comes to improving access to airports by public transport and thus reducing carbon emissions before people get on the plane.

Interestingly, in London and the south-east car-only journeys to the airport were a full ten percentage points lower than the survey-wide average at 63% of members. 22% use the train, 6% (again) use the bus and 2% use a combination of trains and buses. This is a reflection of better public transport in London and the south-east.

We also asked members how their (and their family's) use of aviation had changed in the last five years and what the prospects were for the next five. The results are combined in this chart.



These results have to be viewed in context: the last five years has been an atypical period, featuring the aftermath of an economic crisis; tightened finances, for individuals and for the companies they work for; and a period in which, until very recently, fuel costs rose sharply. Aircraft movements are only now getting back to their pre-crisis levels.

We should also note that the experience of retired members is very different to that of members still in employment – being less likely to see rises in flights and more likely to see falls. More retired people project their usage of aviation to fall in the future. With an ageing population in the UK, this could point to a fall in demand which would question some widely-held assumptions about the market.

The overall conclusions that we can draw from the survey returns are:

⇒ Prospect members are more likely to say that their use of aviation has risen, or will rise, than they are likely to say that it has fallen, or will fall

⇒ nevertheless, only one member in four expects to see their usage rise over the next five years – a net one in seven after we remove the percentage expecting their usage to fall

⇒ for the bulk of members, their usage has remained around the same over the last five and is expected to continue to do so. Furthermore, a substantially higher proportion – reaching nearly two-thirds – expects to see the *status quo* continue over the next five than the proportion for whom this was the case over the previous five.

Collectively, it thus seems that we can envisage a quite substantial slowing down during the next period in the growth of our members' use of aviation. If replicated across the economy, this means **growth, but a slower rate of growth than widely predicted**.

Where members' usage of aviation had fallen in the previous five years, we asked for the main reason why. Across the survey as a whole, 'changes in requirements for travel' was the major reason (cited by 34%), followed by lack of disposable income (24%) – both reasons that might be associated with shifting requirements and expectations as a result of retirement, although these were also the predominant reasons that concerned our employed membership (31% and 29%, respectively). 'Other' reasons were the next most commonly cited, although a lot of these could also be reclassified into 'changing requirements for travel'. For around one in twelve members, concern over the environment was the primary reason for falling usage (rising to one in eleven members currently in the workforce).

The point being brought out here is simple: **people do not fly for the sake of it**. They do so because they have to and that is often because there is no realistic alternative to air travel to get them to where they want to be, be it for business or for pleasure. In this context, 'managing demand' is a problematic policy objective because it seeks to change people's behaviour, rather than addressing their travel choices. There are things which could be done to assist – better use of teleconferencing technology, for example; and nudging people towards holidaying in the UK – but these seem likely to assist only around the periphery of demand management.

Data does exist from the Office of National Statistics which breaks down UK residents' visits abroad by category[3] going back to 1980 – the predominant means for this will of course be air transport, although not exclusively so, particularly since 1994 when the Channel Tunnel opened.

This data shows a rapidly rising demand, at least up until the banking crisis, influenced largely by individuals' choice of overseas holiday destinations with 'business' travel a small part of the overall figure and remaining flat since 2001. With falling oil prices and economic growth returning, the trend is rising again, although it has yet to reach the pre-crash peak, currently standing at the 2002 level.

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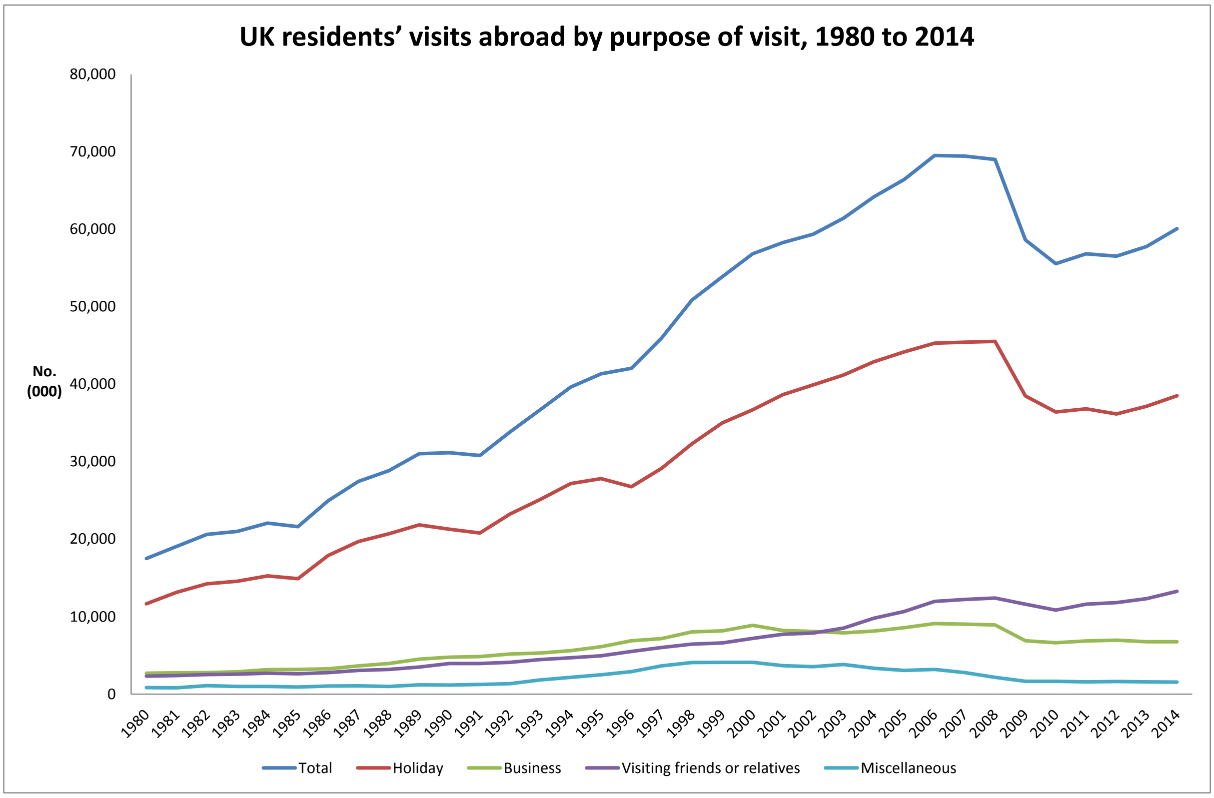
[3] *Travel Trends - Section 1 Travel and Tourism, 1980 to 2014*, available at: http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Travel+and+Transport#tab-data-tables, and with a hat-tip to Carbon Brief: http://www.carbonbrief.org/blog/2015/06/explainer-aviation-battle-to-limit-rising-emissions/.



A significant source of growth since the '90s has been visits to friends and relatives – a trend likely to be most strongly influenced by migration, both of UK residents overseas and (more recently) foreign workers returning 'home' on a regular basis. This has helped fuel the growth of short-haul 'no-frills' operators serving what are not traditional holiday destinations. This travel also dipped in the immediate aftermath of the crash, but has rebounded strongly and is already standing higher than the pre-crash peak. Visiting friends and relatives, as a reason for travelling overseas, has been growing by 5.4% per year across the period since 1980.

Another way to look at the data depicted in the chart is to compare the percentages of the total held by each one. The percentage of total overseas visits taken by people going on holiday peaked in 1989, and is actually now lower than it was in 1980; while both business and miscellaneous reasons for travel are on a downwards trend.[4] Visiting friends and relatives now takes up 22% of all overseas visits: and that represents a rise of no fewer than ten percentage points in fifteen years.

The CAA, in its 2005 analysis of low-cost carriers, has also pointed (to some extent) to such a development, highlighting the number of routes between the UK and Poland in 2000 (just five, four of which were from London, and covering just three Polish cities) and in 2006 (27 scheduled services linking twelve Polish cities and twelve UK airports spread virtually across the whole of the UK). The numbers of international passengers arriving or leaving UK airports also rose by 28%, in the case of existing EU member states between 1998 and 2010; but by 170% in the case of the new member states since 2004.

[4] This by itself would seem to limit the potential contribution of video-conferencing in the reduction of emissions.

Attitudes to capacity

A future deceleration in the growth of Prospect members' use of aviation has a couple of major implications if it is replicated across the economy. Firstly, it seems to have something important to say about the capacity crunch which is driving the demand for airport expansion (and the growth in airline emissions). Our members' use of airlines is rising, although it is not doing so in a way that suggests that usage is rising out of control or that demand can only be met by doing untold damage to the environment. Consequently, our survey does provide **support in principle for increased airport capacity**.

Equally, we should recognise that the major driver for the growth in capacity is not growing individual use *per se*, but greater demand stemming from population change, and particularly population growth. London's population is projected to grow by 37% over the next 35 years, taking it to somewhere between 9.51m and 13.4m by 2050.[5] Partly, this will reflect the numbers of people sucked into London and the south-east from elsewhere in the UK; but partly also it will reflect organic growth – and, at that, amongst the younger and thus more mobile, increasingly migrant, population. To the extent that people are being sucked into London and the south-east, this implies a cannibalisation of demand by airports there from other airports around the rest of the country (and thus a displacement of demand). Nevertheless, it is clear that, with organic growth of this size, **demand for air travel will increase in the south-east**, all other things being equal.

The second implication concerns responsibility for rising emissions. Aviation is responsible for 7% of the UK's CO_2 emissions while, globally, aviation is responsible for 2% of CO_2 emissions (about 3.5% in Europe) – all relatively low percentages in the abstract, albeit that aviation has a relatively high carbon unit cost: the Airports Commission notes that an individual on a return flight from London to New York is responsible for the same level of CO_2 emissions as incurred by the average European in heating their homes for a full year. The overall proportion of CO_2 emissions in the UK for which the aviation industry is responsible has also doubled in the last twenty years even though aviation's total CO_2 emissions now are about the same as they were 10 years ago[6] - the effect of rising demand for air travel against progress in reducing emissions elsewhere in the economy (as well as the progress which has been achieved in reducing emissions within aviation despite rising usage).

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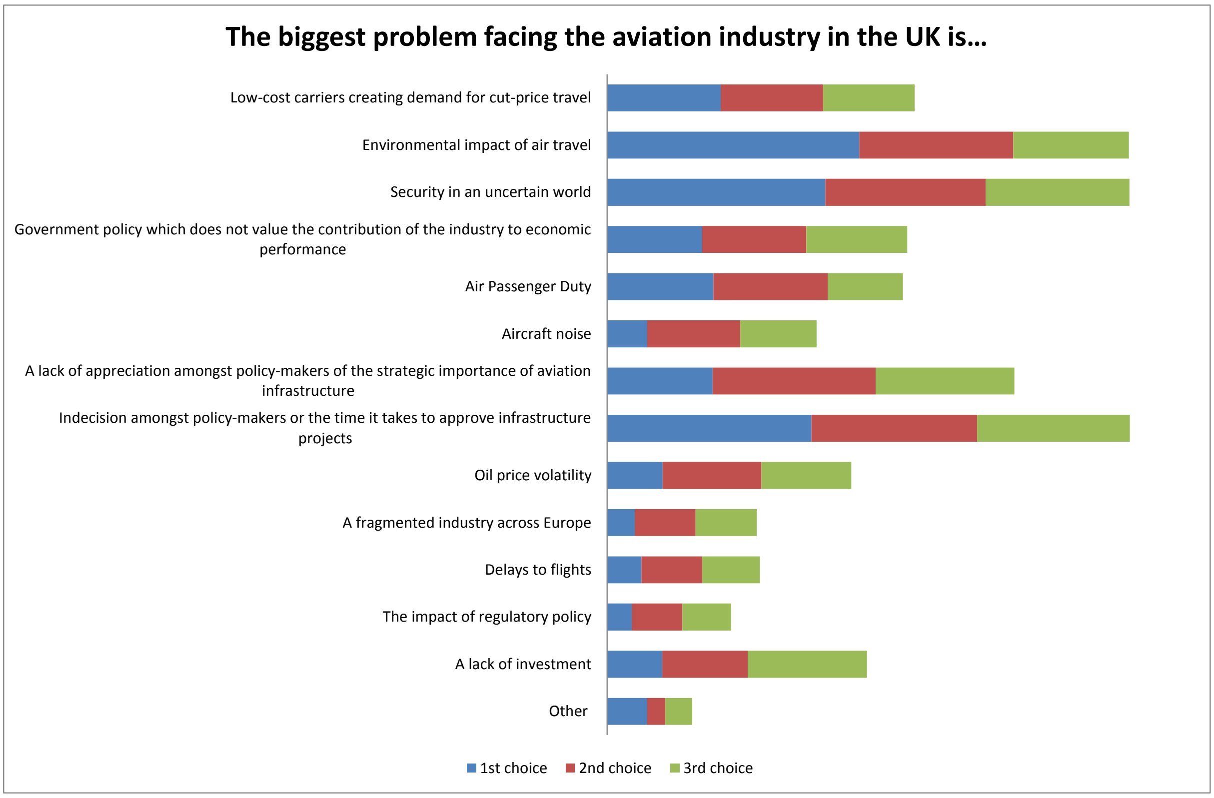
[5] https://www.london.gov.uk/sites/default/files/Population%20and%20employment%20projections%20to%20support%20the%20London%20Infrastructure%20Plan%202050.pdf. The UK's population is also, of course, rising: the Office for National Statistics suggests that the UK population will grow from 63.7m in 2012 to 71.7m by 2032 and to 77.5m by 2052 – a 40-year growth of 22% - not as high as in London, but sizable all the same: http://www.ons.gov.uk/ons/rel/npp/national-population-projections/2012-based-reference-volume--series-pp2/executive-summary.html#tab-Projected-Population-Change.

[6] See https://www.gov.uk/government/publications/airports-commission-final-report, Chart 2.12 and surrounding discussion.

However, on the analysis that it is not individuals who are largely responsible for rising demand and rising aviation emissions - rather population change - a policy based on demand management targeted at individuals is going to have different, and frequently problematic, impacts. To start with, measures such as price-based controls to limit demand are likely to end up in air travel becoming restricted (once again) to the rich. That's simply not an outcome that Prospect can support, however much we recognise the need for action on emissions.

It is also important to recognise the interface here with other public policies – including those on migration, where it would be invidious to institute policies which make travel 'home' more costly for EU migrants, for example, and which would have a potentially significant impact on the UK labour market were these to deter people travelling to the UK for work or education in the first instance. Neither would it seem fair to make this group of people – young, with young families and who are, largely, poorly-paid but for whom air travel represents a much higher load on their disposable income – bear the brunt of policies designed to reduce emissions.

We also asked our members what they thought were the biggest problems facing the aviation industry in the UK. Here, we provided respondents with a list of thirteen options, plus a write-in 'other' box, and asked members to rank their top three choices.



The top three choices were all within literally a handful of votes of each other although, in terms of first choices, the environmental impact of air travel came top of the list. Security is an enduring issue, backed up in people's minds by the terrible year that aviation had in 2014/15; while indecision amongst policy-makers and delays to infrastructure projects is a concern that inevitably arises from the decades of political (in)action over the expansion of airport capacity in London and the south-east, with the current debate stretching as far back the early part of the 2000s.

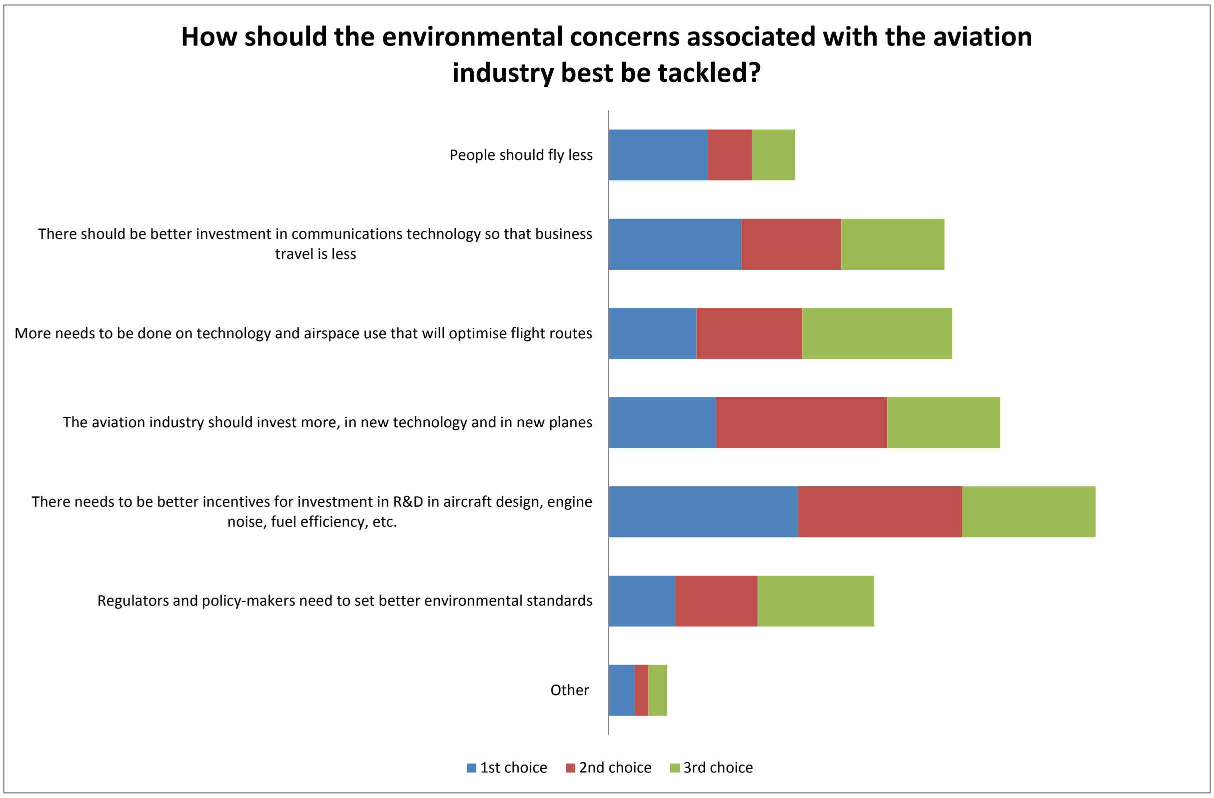
Aviation and the environment

On the environmental issue, we also asked members how concerned they were about the impact of aviation on the environment, asking them to rate their concern on a scale of 1-10. Dividing the scale into three sections – low (1-3); moderate (4-7); and high concern (8-10) – indicates that the mean score (6.02) puts the average Prospect member on the slightly high side of moderate concern. This is not a surprising result since people do tend to rate in the middle (49% of responses here were between 4 and 7); the interesting analysis, however, occurs in relation to the extremes, ie people who were either unconcerned or highly concerned. The balance here was much more towards high levels of concern:

⇒ 32% of members scored their concern between 8 and 10, of whom 11% rated at 10. In contrast, a much smaller percentage were unconcerned: just one in five scored their concerns between 1 and 3

Perhaps unsurprisingly, members in aviation were much less likely to be strongly concerned: at 16%, the percentage rating their concerns between 8 and 10 was one-half of the 33% of members outside aviation who rated similarly.

We asked our members in our survey for their thoughts on how the environmental concerns associated with the aviation industry might best be tackled, listing six options from which we asked them to pick their top three choices (while also providing an 'other') opportunity. The accompanying chart includes each option listed and the number of times each one was mentioned in respondents' top three choices.



The most popular option – including both as regards the number of times mentioned in total and the number of times it appeared as respondents' first choice – was the need for greater incentives for investment in aviation R&D. It is unclear precisely what 'incentives' people had in mind, while R&D expenditure already attracts relief from corporation tax, but it is quite possible to be very creative as regards how these might play out, particularly should the government choose to support investment in the aviation industry from the perspective of clearly addressing the issues that it faces in the environmental context. It is absolutely clear that respondents recognised the need for greater public support for the industry if it is to play its part in achieving targets while remaining oriented towards growth. Indeed, the scale of the problem means that public support is probably essential in tackling the issues head-on and in full.

Respondents also recognised the need for the industry itself to invest more, in new technology and in new planes – a view which is extremely complementary to the above and which is a policy action that is likely to flow from it. This was the second most frequently-mentioned choice, and the third most mentioned top choice. There was also strong support for operational measures that would make better use of technology and airspace use so as to optimise flight routes – on which much work, as we have already indicated, is already being done although this does need to be both deepened and, where appropriate as regards air traffic management which promotes safety first, brought into practice.

Given the timescale for the reduction of aviation emissions to their 2005 level (i.e. by 2050), it is perfectly possible that such an enhanced level of incentives as to achieve these aims, where put in place quickly, have a good chance of realising results which allow actions to be taken at an appropriate time. This would therefore represent a major contribution to the development of the sustainability of the industry.

There was little support in our survey for people flying less – it was the least-preferred option of the six listed, although there was quite a high level of first preference support. This suggests that the demand management debate is one that is well-understood amongst the environmentalists within Prospect membership. This lack of preference in general is, however, understandable: flying less (and demand management policies in general) will inevitably be an unpopular choice, as campaign groups have also recognised.

It is therefore clear from our survey evidence that Prospect members would much prefer to see investment, and incentives for greater investment in R&D, in dealing with emissions – something that will only pay off in time, although there is time for it to do so – with flying less very much a last resort. It is likely that demand management will have to play some part at some point in the future: alternative technologies will ameliorate some of the growth in demand as regards the impact this would otherwise have on emissions targets, as the Committee on Climate Change recognises. However, it is unclear precisely how much. There is, however, a small window in which to maximise the potential of these to combat emissions and it is vital that we take it.

The evidence from our survey on aircraft noise is somewhat mixed: some 22% of members say they live underneath a flight path on which aircraft are making their initial departures from, or final approaches to, an airport. Among this group, just under one-third say they are concerned 'a lot' (12%) or 'some' (19%) about plane noise; 43% say they are 'not concerned'. Accepting that some members live underneath flight paths which take a considerably lower volume of traffic than Heathrow, or which may still be some distance away from an airport, this means that between six and seven per cent of members are reasonably concerned (a 'lot' or 'some') about plane noise.

The other main concern of members was the lack of appreciation of the strategic importance of aviation infrastructure. This attracted a relatively smaller amount of first choice preferences but a much higher number of second order ones; with four or five other issues in close order of importance and led by the impact on the industry of low-cost carriers creating a demand for travel. Low-cost carriers existing to drive prices downwards might represent good value for members in the short-term where the price of flying falls (not least for the routes they fly and their attraction to migrant workers in the UK). However, there are issues around their growth which arguably challenge the long-term interests of air travellers and the aviation industry, including the interface with price-driven cost-cutting measures and safety, about which Prospect is particularly concerned (and which is a theme we focus on in this report). In addition, the issue of demand management becomes much more difficult when the public has become used to falling prices (and where an industry has grown up on that basis).

It's fair to say that our members in aviation had a somewhat different set of priorities, headed by the two infrastructure concerns and followed by the contribution of the industry being undervalued in government policy (which, actually, secured most first choice preferences). Air Passenger Duty also featured highly.

The impression that we can gain from this is that, overall, Prospect members are aware of, and concerned about, the industry's environmental impact but are nevertheless appreciative of the strategic role of the aviation industry and its infrastructure to society and economy in the UK. They believe that growth is likely and should be supported, and they believe that an end to the lengthy indecision over infrastructure investment projects is essential. Taking together the strategic contribution of aviation and an end to indecision, over 23% of Prospect members indicated that either one or the other was the single biggest issue facing the industry – and that clearly encompasses a wide variety of members who do not work in aviation.

Airport expansion

When we asked our members on the thorny issue of airport expansion in London and the south east, members were largely in tune with our argument on increased capacity:

⇒ 49% agreed there was a need for more capacity; 29% disagreed

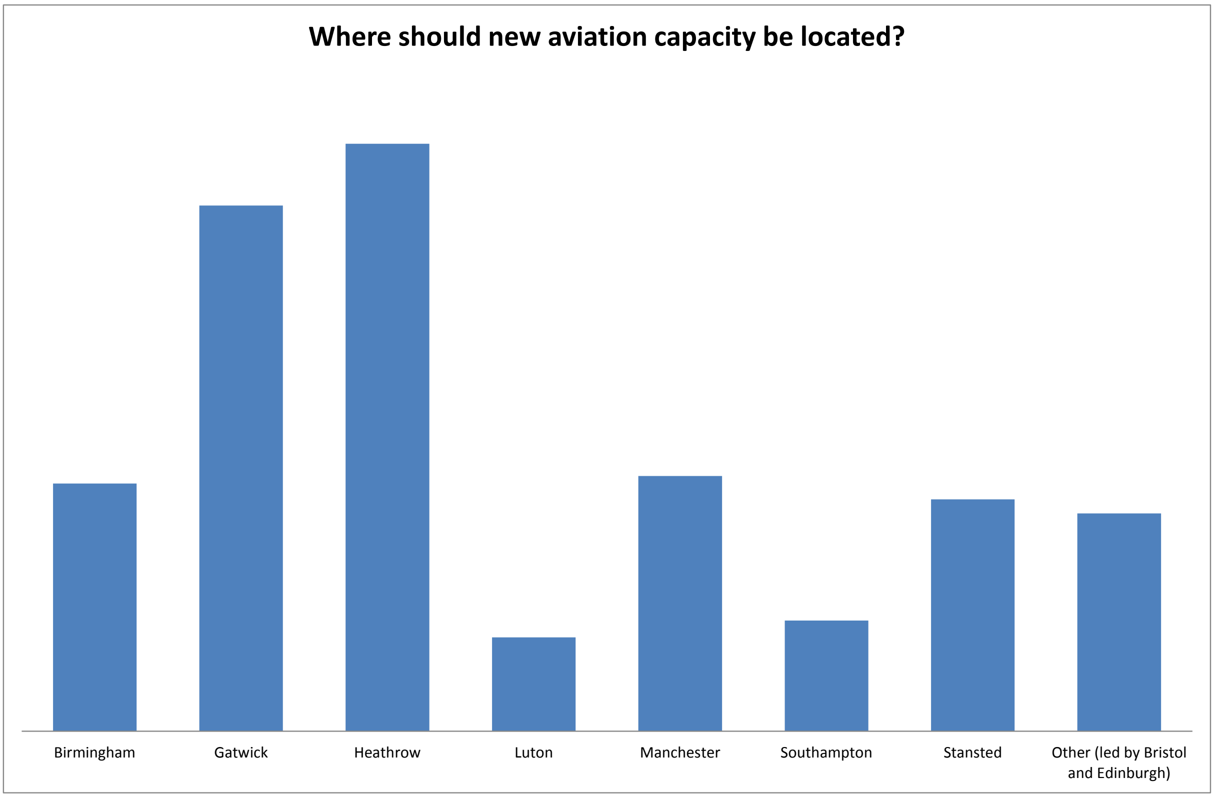
This included a substantially higher proportion of members who work in the aviation sector (as expected) but still amounted to a clear majority of those who worked in sectors outside aviation (where 46% agreed as against 29% who disagreed). However, there was a large number of 'don't knows' (22% of all those surveyed), as well as a strong split between aviation and non-aviation members, indicating that the debate has failed to capture the decisive imagination of a substantial number of people outside aviation.

Interestingly, amongst members in London and the south-east, there was a greater show of support for more capacity: 55% agreed compared to 26% who disagreed; a clear 2:1 majority in favour. 'Don't knows' were a couple of points lower but, at 19%, not substantially so. This suggests that proximity to the debate has the effect of adding to the proportion in favour of greater capacity in London and the south-east, but has left more or less equal numbers puzzled (or simply unengaged) as elsewhere.

Relatively few members who agreed with the need for new capacity thought that this could be resolved by a new airport alone (just 17%); while 39% thought that new runway(s) would address the problem, which was just ahead of the 37% who said 'both'. The high proportion supporting both new runways and a new airport seems to indicate that, of those members who do see the need for new capacity, their level of support was strongly-founded.

Members who pointed to new runways as the solution were asked their preferred choices as to where these should be located, in a question whose options did not confine them to the Heathrow/Gatwick binary facing the Airports Commission.

Inevitably, in a questionnaire survey going to all corners of our membership, and without limiting respondents' choices to London and the south-east, there was **strong support for greater capacity at airports other than those within the focus of the Airports Commission**.



However, there was also a strong degree of support from members for Stansted, where there is spare capacity (at least currently) and which had previously been intended to take some of the strain from Heathrow. Support here came – perhaps most obviously – from our members in the east of England and stood at nearly twice the level amongst this group as for Heathrow.

This does illustrate that members do not want to travel more than they have to in order to reach well-connected airports and that there is, therefore, strong support for the hub model of operations (even though Stansted is, currently, the preserve of low-cost carriers flying point-to-point).

Furthermore:

⇒ 83% of Prospect members agreed that existing regional airports needed to be better developed with regard to integrated transport links; while only 8% disagreed

This is an issue which is important not least in terms of meeting capacity demands in the meantime, pending the planning consents, construction and delivery of whatever decision the government eventually reaches on new capacity: the Airports Commission specifically highlighted the opportunities that the existing capacity constraints in the south-east will present to other UK airports in the intervening period. This would include Stansted, for example, whose runway is currently capable of accommodating an additional 20-25m passengers per year. However, it is important also in freeing capacity in south-east, with many passengers from other close-by regions travelling to London airports for flights: six million every year from the west of England, for example. Alleviating some of this capacity by better connectivity at regional airports would resolve some of this demand, while recognising that it cannot resolve it all.

Nevertheless, Gatwick and Heathrow were the two major choices of Prospect members supporting an extension of capacity, and there was not a lot between them: of those who picked at least one of these two, Heathrow was supported by 53% compared to Gatwick's 47%. This vindicates Prospect and the TUC in not taking a position for one of the options, despite our stance in favour of greater airport capacity in general.

Air Traffic Management

Our survey asked a series of questions on air traffic management. Our members' views were very clear:

⇒ 61% of members disagree that market principles and competition are the correct approach to the provision of air traffic control services; of whom 35% say 'definitely not'

⇒ fewer than 14% of members think that a clear market exists for the provision of air traffic control services in the UK: two and a half times as many think that it does not (34%); while a simple majority do not know. This is a key result in the sense that it is not clear to our members that such a market can be contestable and, where it is clear, our members are against the introduction of competition to introduce that degree of contestability by nearly 3:1

⇒ 94% of members think that the state should have 'a lot' or 'some' involvement in principle in the provision of support for the resourcing of air traffic control services, of whom 63% say 'a lot'

⇒ there was strong support for UK ownership of air traffic control services, with a majority of members stating they would be less comfortable flying where those services had been contracted out to a non UK-owned provider.

This analysis has been extremely important in framing Prospect's approach to these issues. We cannot (and should not) ignore the very high importance that members across the union attach to the environmental impact of aviation – but we can also see that our members, so many of whom work in various parts of the UK's infrastructure, have a very strong belief in the role that infrastructure plays in economic development. Our members working in aviation do not need to feel that they are isolated from the concerns and the consideration of their fellow Prospect members.