Corporate Travel Survey 2012
Methodology

Research took the form of an online self-completion questionnaire sent to a sample of aviation professionals.

Field work took place between **29th June** and **31st July 2012**

**624** responses to the survey were received
Executive Summary

• Ascend ran a corporate travel survey in 2009, 2010 and 2011. **Geographically, the sample in 2012 was largely comparable to 2011**, with 41% of respondents based in Europe and 34% based in North America this wave compared to 43% and 30% previously. 71% are of management level or above.

• **92% have made at least one short-haul trip** for business. **87% have made at least one long-haul trip** for business. In 2011, these figures were **95% and 71% respectively** (though note the definition of short/long-haul has changed from +/- 5 hours previously to +/- 3 hours in 2012). The average number of short haul flights taken in the last year is **12**, compared to **7** for long haul.

• There has been a **small shift away from premium economy to economy class for long-haul flights** – with 25% travelling in economy and 14% in premium economy vs. 20% and 19% last time this research was conducted. Of those travelling on long haul flights, **61%** travel by either business or first class.

• **33% expect the number of flights taken by employees of their company to increase over the next year**, compared to last year. **16%** expect this increase to exceed 10%. Correspondingly, **37%** are expecting to see a rise in their company’s corporate travel budget over the coming year.

• The three most important aspects of managing corporate travel costs were identified in 2011 as using the internet to find cheaper fares, considering a choice of hotels and using agencies to achieve deals. In 2012, they are using the internet to find cheaper fares, **reducing the number of staff travelling** and reducing conference/exhibition travel, indicating that companies are now more inclined to reconsider employee travel requirements as a means of reducing costs.

• The aspects of air travel that many respondents feel has improved over the past 2 years include the check-in experience (with the ability to check-in online being mentioned positively by many), **convenience, passenger contact/information processes** and **choice of flights/airlines**.

• By far the biggest complaint about corporate air travel was **security processes causing queues and delays**, which was also the biggest issue raised in the 2011 survey. Respondents felt that this problem had worsened over the past two years. Another negative aspect raised was **poor customer service**, particularly on-board the plane although business/first class passengers rated the service more positively than economy class passengers.

• **Rising fair prices** were also reported. These are generally felt not to have been met with a corresponding improvement in service. The problem of high prices is expected to get worse by many, as **79%** of the sample agreed that global consolidation in the industry will result in less choice and higher prices.
Respondent Profile
Please indicate which region you are based in:

- Europe: 41%
- North America: 34%
- Asia Pacific: 14%
- Middle East: 5%
- Latin America / Caribbean: 3%
- Africa: 2%
- Other: 1%

Base: All respondents 474

Which of the following best describes your seniority?

- Corporate Officer: 16%
- Senior Management: 23%
- Management: 32%
- Qualified professional: 18%
- Analyst/ Consultant: 8%
- Administrator/ Office: 1%
- Other: 2%

Base: All respondents 471
Business Travel Habits
Flights Taken for Business

**Short Haul**

- Average trips made: 12

- 51+ (3%)
- 16 - 50 (18%)
- 6 - 15 (33%)
- 1 - 5 (39%)
- None (8%)

How many business trips have you made by air using **short-haul** flights (i.e. < 3 hours) in the last 12 months? N.B. Please treat an outward and return trip as one.

**Long Haul**

- Average trips made: 7

- 51+ (1%)
- 16 - 50 (7%)
- 6 - 15 (25%)
- 1 - 5 (53%)
- None (13%)

How many business trips have you made by air using **long-haul** flights (i.e. < 3 hours) in the last 12 months? N.B. Please treat an outward and return trip as one.
When flying on long haul business trips, in which cabin class do you travel most frequently?

- Business class: 57%
- Premium economy/Premium coach: 14%
- Economy/Coach: 25%
- First class: 4%

Base: All respondents who have travelled long haul in the last 12 months - 512
Compared to the last year, over the next year do you expect the **number of flights** taken by people in your company to...

**Number of Flights**

- **Increase by more than 30%**: 3%
- **Increase by 21% - 30%**: 4%
- **Increase by 11% - 20%**: 9%
- **Increase by 1% - 10%**: 17%
- **Remain about the same**: 38%
- **Decrease by 1% - 10%**: 13%
- **Decrease by 11% - 20%**: 8%
- **Decrease by 21% - 30%**: 2%
- **Decrease by more than 30%**: 1%
- **Don't know**: 5%

Net: 9% increase

Base: All respondents 479

Compared to the last year, over the next year do you expect your **company’s air travel budget** to...

**Air Travel Budget**

- **Increase by more than 30%**: 2%
- **Increase by 21% - 30%**: 4%
- **Increase by 11% - 20%**: 11%
- **Increase by 1% - 10%**: 20%
- **Remain about the same**: 31%
- **Decrease by 1% - 10%**: 14%
- **Decrease by 11% - 20%**: 8%
- **Decrease by 21% - 30%**: 3%
- **Decrease by more than 30%**: 1%
- **Don't know**: 6%

Net: 11% increase

Base: All respondents 479
Managing Travel Costs

How important are the following factors in managing business travel costs in your company over the next year?

- Using the internet to find cheaper airfares
- Reducing the number of staff travelling
- Using a travel agency to achieve deals
- Using the cheapest airline
- Reducing conference/exhibition travel
- Choice of hotels
- Lowering class of travel
- Buying non-flexible tickets

Base: All respondents 482
Opinions of Business Air Travel
Please indicate on a scale of 1 to 5 (where 1 is much worse and 5 is much improved) whether you believe that the following areas of air travel have got worse or have improved over the past 2 years.

### Change in Aspects of Air Travel

<table>
<thead>
<tr>
<th>Aspect</th>
<th>1 Much worse</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Much improved</th>
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<tbody>
<tr>
<td>Security queues</td>
<td>18%</td>
<td>27%</td>
<td>32%</td>
<td>18%</td>
<td>5%</td>
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<tr>
<td>Fare prices</td>
<td>13%</td>
<td>35%</td>
<td>38%</td>
<td>13%</td>
<td>2%</td>
</tr>
<tr>
<td>Number of passengers on aircraft</td>
<td>13%</td>
<td>25%</td>
<td>39%</td>
<td>18%</td>
<td>4%</td>
</tr>
<tr>
<td>Airline service on board</td>
<td>11%</td>
<td>36%</td>
<td>33%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>Airline service off the aircraft</td>
<td>9%</td>
<td>28%</td>
<td>43%</td>
<td>18%</td>
<td>2%</td>
</tr>
<tr>
<td>Services and capacity</td>
<td>8%</td>
<td>28%</td>
<td>44%</td>
<td>19%</td>
<td>1%</td>
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<tr>
<td>Delays</td>
<td>6%</td>
<td>22%</td>
<td>47%</td>
<td>23%</td>
<td>3%</td>
</tr>
<tr>
<td>Choice of low cost airlines</td>
<td>5%</td>
<td>17%</td>
<td>46%</td>
<td>27%</td>
<td>5%</td>
</tr>
<tr>
<td>Passenger contact and information processes</td>
<td>4%</td>
<td>14%</td>
<td>47%</td>
<td>31%</td>
<td>5%</td>
</tr>
<tr>
<td>Choice of cabin class</td>
<td>3%</td>
<td>16%</td>
<td>59%</td>
<td>20%</td>
<td>2%</td>
</tr>
<tr>
<td>Check-in experience</td>
<td>3%</td>
<td>15%</td>
<td>38%</td>
<td>36%</td>
<td>8%</td>
</tr>
<tr>
<td>Choice of flights and airlines</td>
<td>3%</td>
<td>18%</td>
<td>44%</td>
<td>29%</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Base:** All respondents 509
Change in Aspects of Air Travel
Comparison of business/first class and economy class passengers

Those who travel via economy class for long-haul flights generally find on-board service to have worsened more than business/first class passengers.
Agreement With Statements About Air Travel

Please indicate your agreement or disagreement with the following statements:

1. My company uses low cost airlines for a significant part of short haul business
   - Agree strongly: 17%
   - Agree slightly: 28%
   - Disagree slightly: 31%
   - Disagree strongly: 24%

2. Improvements in technologies have reduced the need for business travel within my company
   - Agree strongly: 23%
   - Agree slightly: 37%
   - Disagree slightly: 28%
   - Disagree strongly: 21%

3. The economic downturn has meant my company has had to cut back on business travel by air
   - Agree strongly: 21%
   - Agree slightly: 52%
   - Disagree slightly: 23%
   - Disagree strongly: 4%

4. Global consolidation in the airline industry will result in less choice and higher prices
   - Agree strongly: 31%
   - Agree slightly: 48%
   - Disagree slightly: 16%
   - Disagree strongly: 4%

Base: All respondents 326
What is your biggest complaint about global business air travel?
Biggest Complaint About Global Business Air Travel

Security

- No consideration to pass immigration quickly
  The requirement to go through security again and again during a connection at the airport.

- The whole airport experience - every airport has a different security process but they all take a long time, delays are frequent leading to missed connections or long layovers.

- Too much time required at immigration/customs desk.

- Security and immigration queues

Delays

- Delays due to congestions at airports

- Delays and missing connections onward

- Delays - especially at key hubs where the same flight is delayed every day.

- Couldn't they schedule better?

- Delays or cancellations not fully explained.

Poor Customer Service

- The attitudes of security staff.

- The rudeness of the flight attendants

- Airline customer services (on-board & in airport) offered in comparison to the prices being paid.

- We are having to pay too much and yet treatment and service level have fallen so much.

- Lack of properly trained staff

Prices

- No service anymore but same or higher fares

- Higher charges to change ticket dates / routings.

- Added fees and charges for every small item.

- Higher prices, less service.

- Car Park Cost.

Base: All respondents 385

What is your biggest complaint about global business air travel?
In your opinion what is the most positive aspect of global business air travel?

**Customer Service**

- Higher level of customer service
- Business class service on board is always more than satisfactory
- Personable flight attendants who can use their experience, authority and power to rearrange the cabin to accommodate everyone once on board.
- Improved attention to cabin, food and service
- Lounge and on board services remain good meaning that the actual flight is enjoyable. It is the process involved in getting to the flight that is annoying.

**Choice**

- More airlines and more flight choices
- Options. There are more options and some quite good airlines entering/expanding.
- The number of high quality airlines serving London
- Choice of flight and airlines
- The increased choice available via the internet

**Convenience**

- Easier to get anywhere.
- Face to face meetings
- It gets me from A to B in better shape than any other form of transport
- It is the fastest way to travel
- The ease with which you can get to so many places from London-area airports is hugely underrated.

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*Base: All respondents 385*