

# Global travel survey asks, 'how much are consumers willing to sacrifice for cheaper airfares?'

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Synovate, a leading market research company, has released the results of a global study into perceptions of budget air travel and corresponding consumer behaviour.

With budget airlines increasingly ruling the skies, Synovate sought to better understand the current and future traveling behaviour of different nationalities. The study involved some 5000 respondents across the United States, Canada, France, Germany, Hong Kong, Malaysia, Singapore and Thailand.

## High Flyers

Firstly, the study identified which nationalities love to fly and which ones prefer to stay grounded.

Of all the respondents contacted, 59% said that they had flown before. However, of those surveyed, the net percentage of travel was at its highest in Hong Kong (80%) and Singapore (82%), which is not surprising given that these are both island cities. At the other end of the scale were the French, who appear to be the most reluctant flyers with only 35% having flown before. The title of most frequent flyers went to the Malaysians, with 2.2% stating that they fly two or more times a month.

When asked whether the majority of their flights were spent on leisure or business, respondents from all countries claimed to travel primarily for leisure. The study found that over 20% of people in Malaysia and Thailand cited business as their main reason for air travel, whereas their European counterparts were more leisure oriented when it comes to plane trips, with only 6% of Germans and 7% of the French mentioning business travel as their primary reason for flying.

## Low cost, big business

The study then turned to budget air travel specifically.

With the budget phenomenon just hitting Asia, people in Malaysia and Singapore, unsurprisingly, hardly ever travel on budget airlines, with 56% and 83% of air travellers in these countries saying they never fly a budget airline. Across the Pacific in the US and Canada, however, approximately 50% of respondents admitted to flying budget airlines at least some of the time. Europeans seem to fall in between these two extremes, with over 32% of air travellers in France and Germany choosing budget airlines for at least some of their flights.

75% of respondents agreed with the statement that "an airline trip is just like a bus trip", saying that they wanted "to get there fast and cheap". 64% added that they would always choose a budget airline over bigger or national carriers if the budget airline ticket price was lower (interestingly, Germans were least likely to do so). This was in spite of the fact that an overall 32% felt that budget airlines "treat passengers like a commodity - there is no personal service". Overall, 73% were willing to give up the meal if the price were cheaper.

Of all the nationalities surveyed, Malaysians seemed to be the most fond of perks and amenities, with 50% saying that they would avoid budget airlines at all costs if it meant giving up the comfort provided by larger national airlines.

## The deciding factors

Despite complaints about budget airline service, when asked what was the single most important factor in choosing an airline, frugal Americans (34%), Canadians (36%), French (32%) and Germans (27%) still cited ticket price. Yet in Hong

Kong, airline reputation ruled the roost, with 30% of travelers saying it was the most important factor for them (only 15% cited ticket price). In Singapore and Thailand, over 23% of respondents reported seat comfort and legroom as their top consideration. Thai respondents also singled out in-flight perks and amenities, with 22% claiming that this was the second most important factor for them. Other nations were not convinced. A mere 1.9% of Canadians, 1% of Singaporean respondents and only one American cited in-flight perks and amenities as a deciding factor.

## Does sex sell in the skies?

And what about the lure of good looking cabin crew? The study then sought to discover whether attractive cabin crews were more important than good food or movies when it came to choosing an airline!

Overall, 25% of men - twice the amount of women - felt that this was more important. German and French males, however, were less interested than the average in a high altitude flirtation, with 65% and 60%, respectively, disagreeing with the idea. Hong Kong men were more evenly spread, with over 30% siding with pretty cabin crew over food and movies. American males came a close second at 29%.

French women overall, like French men, were overwhelmingly more likely to opt for food and drink over attractive flight attendants, but a significant minority (19%) were more interested in the attendants than the refreshments. This is as opposed to 11% and 6%, respectively, of women in Hong Kong and Singapore. Overall, it seems that most women would rather settle in with a good film and palatable food than enjoy some high-flying 'eye candy'...

Synovate's Head of Global Omnibus, Tom Mularz, commented on the research: "With all airlines under a number of economic pressures in the post-9/11 world, budget airlines are offering tickets at around half the current market prices on 1-2 hour short-haul flights.

"But anyone who has flown commercially in the past few years can attest to that fact that the glamour of air travel has long since dissipated. Today, cost conscious airlines - especially in North America and Europe - have created a hodge-podge of budget airlines with long lines, self-service shortcuts and decreasing legroom and amenities. We wanted to know how travelers around the world feel about having their heads in the clouds and their knees in their chest!"

### *About the survey*

The findings are taken from a Synovate Global Omnibus survey of over 5,000 qualified individuals conducted in the United States, Canada, France, Germany, Hong Kong, Malaysia, Singapore and Thailand.

Synovate's Global Omnibus has united the world's best omnibus services in the Americas, Asia, Europe and the Middle East, providing access to CATI telephone, Internet and face to face omnibus methodologies in 53 countries worldwide.

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