



Customer issues related to limitations in air connectivity

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Abstract

Air access is claimed to be most crucial for regional economic development, especially in terms of globally acting industries. However, air traffic generates potential negative impacts, such as noise or air pollution, which case wise might lead to the claim to reduce air traffic politically. This paper investigates customer issues and potential responses of frequent flyers to non market driven limitations of air transportation (frequent flyers are considered to be more affected by such measures than non-frequent ones). Based on a survey conducted at Zurich airport in June 2006 and the test of a number of hypotheses, it can be shown that frequent air travellers as opposed to non frequent ones supposedly hold comparably higher office, and work in industries and environments which communicate intensively with nodes outside of Switzerland. Consequently, frequent flyers as opposed to on frequent ones have a more critical attitude towards potential limitations of air connections.

Keywords

Air transport – Air connectivity – Switzerland – Customer issues

1. Introduction

A number of studies (cf. to literature review) reveal that for enterprises making location decisions access to markets and international transport links are regarded as absolutely essential (Airports Council International, 2004; York, 2004). The same studies also note that the benefits of good air connections are perceived less distinctive when present in contrast to when they are absent; i.e. the negative sensation towards a lack of good air connectivity is of larger extent than the positive sensation associated to an abundance; this is especially true in regions of this world, where good air connectivity is ubiquitous (such as in most centres in Europe).

However, local negative impacts of air traffic (noise, air pollution, etc.) repeatedly lead to a request limiting air transport supply (and thus connectivity), sometimes even up to the extent of imperfect demand absorption. That request is - in general - heavily contested, mostly with arguments such as "globally acting export industries need good air connectivity", "people flying a lot need good connections", "managers need a large selection of direct O&D; transfer connections are far less attractive than direct ones", and so on. The claim for the limitation of aircraft movements is currently affecting the major Swiss airport, Zurich, as are contesting arguments.

This is why this study investigates customer issues related to the non market-driven limitation of air connection supply. Based on the results of a short literature review, and the analysis of data of a survey conducted at Zurich Airport in May 2006, a number of hypotheses shall be tested and discussed by comparing a number of issues as perceived by frequent flyers (rather affected by limitation measures) as opposed to non-frequent ones.

2. Literature review

Air connectivity has been consistently addressed in studies on location decisions. The majority of such studies (see below) come to the conclusion that air connectivity is crucial and thus for most types of business and thus prerequisite when it comes to a location decision.

This is especially true in areas of the world where such a condition is not met everywhere. For instance in the US - where good air connectivity is not offered in many areas of the country - the presence of sufficient air connections is among the key location factors. Jungthirapanich und Benjamin (1995) have content-analysed numerous studies on location decisions of American production companies. A ranking of the most important factors (cf. to figure 1) revealed that transportation infrastructure and services are among the decisive factors in favour of a given location. This result was supported by a study by Walter and Suzuki (2002) in the Midwest, which named customer proximity and transportation access as first and second rank order location factor. The authors argued - in line with others - that the awareness of air connectivity is only raised when such transportation services are not or only insufficiently available.

Figure 1: Ranking of US location factors

Factor	Metrics
1. Market	Proximity to markets, local consumers' purchasing power
2. Transportation	Land transportation, water transportation, air transportation
3. Labour	Availability of general employees, availability of science and engineering employees, labour unionisation, work stoppages
4 Site consideration	Cost of land, cost of plant construction
5. Raw materials and services	Availability of raw materials, availability of business services
6. Utilities	Energy generating capacity, energy costs, fuel availability, water availability
7. Government concerns	Federal aid to local government, government's debt, taxes, state supported employee training
8. Community environment	Housing availability, education, health and medical considerations, human services, security, environmental considerations, cost of living, business climate, physical climate

Source: Jungthirapanich & Benjamin (1995)

A similar effect can also be observed with studies looking at Eastern European locations (where transportation infrastructure and services are still under development). As the location

examination of Saxony by the Technical University of Dresden (2005) revealed, transport infrastructure as well as accessibility and connectivity is still among the top 4 entries which drive investment decisions.

However (and in contrast), in the majority of studies assessing the accessibility of Western European locations, air connectivity seems not to be as crucial as in the geographical areas discussed before. One possible reason for that might be grounded in the fact that air connectivity is ubiquitous in the majority of European regions. Moreover, it has become over time one of those hard location factors which leave dwindling room for regional differentiation: Air connectivity is considered as part of basic infrastructure and services which one can automatically expect more or less anywhere in Europe (Grabow, 1995; Meyer-Stamer, 1999; Laesser and Wittmer, 2006).

Even if the explicit claim for air connectivity seems to be decreasing, there is still a strong implicit need in many cases, one of which is - not surprisingly - the transportation industry (Glaser and Menze, 2003; Foster, 1999). In addition, and from a structural perspective, the number of corporate headquarters within an area also drive the implicit need for air connectivity, as shown in a recent study by Arthur D. Little (2002). A number of factors, which indirectly drive demand for air transportation, entered high, such as *Central Location*, *International Managers*, and *Ease of attracting Top Managers*. Those results were supported and complemented by a study of the Netherlands Economic Institute und Ernst & Young (2002; commissioned by the EU). The need for proximity of an airport and air connectivity is less important with production sites (9%) than with head offices (46%). Additionally, it is more important for distributive activities (25%) than for services (7%). Finally, and as a number of additional studies have shown, frequent flyers (which likely foster relations from or to a headquarter) prefer options in terms of numbers of flights ahead of comfort in terms of non-stop connections (Jara-Diaz and Guevara, 2003; Fowkes, 2001; Hensher, 1997)

Contrasting the rationality associated to location decisions, a number of studies stress that such decisions are never fully rational, especially when they involve top management personnel. Studies by Arthur D Little (2002) as well as Wessel (2003) and Mazzarol and Choo (2003) reveal that personal reasons in many cases override rational location decisions, especially when the person making the decision is personally affected by its consequence (which is especially the case with SMEs).

3. Hypotheses and their rationales

From the literature review above, we shall derive a number of hypotheses

Hypothesis 1: The "higher" a traveller's professional position, the more flights he/ she completes.

Rationale: High professional positions are normally associated with a broad span of responsibility (headquarter type of position), which in turn leads to a higher air travel propensity.

Hypothesis 2: The higher the export orientation of the industry a traveller is working in, the more flights he/ she completes.

Rationale: Exports result/ are initiated by international sales activities which in turn lead to a higher air travel propensity than with non export-oriented industries.

Hypothesis 3: The higher a traveller's share of regular interaction/ communication with contacts outside of Switzerland, the more flights he/ she completes.

Rationale: Communication in many reasons needs to take place face-to-face and cannot or will not be substituted by other means. Moreover, professional business communication is driven by a panoply of reasons, including sourcing, sales, coordination of projects within own company and inter-company, etc.

Hypothesis 4: The more often a traveller takes a plane, the closer to the airport he works.

Rationale: Companies and their employees, who likely have to fly a lot, will chose a working location which is close to the airport.

Hypothesis 5: The more often a traveller takes the plane, the more critical is his attitude towards potential limitations of air connections.

Rationale: Frequent flyers perceive a given supply as ubiquitous and therefore react - more than others - sensitively towards options limiting activities.

Hypothesis 6: The more often a traveller takes the plane, the rather he favours an increase (decrease) in numbers of flights to given destinations instead of the introduction (cancellation) of new destinations when flights from a given airport in general increase (decrease).

Rationale: As a number of studies have shown that frequent flyers prefer options in terms of numbers of flights ahead of comfort in terms of non-stop connections.

Hence, we overall hypothesize that frequent air travellers as opposed to non frequent ones supposedly hold comparably higher office (#1), and/ or work in export oriented industries (#2), communicate intensively with nodes outside of Switzerland (#3), and live comparably

close to the airport (#4). They have a more critical attitude towards potential limitations of air connections (#5), and they prefer high number of connections (#6).

4. Data and methodology

Survey instrument: The survey instrument was a self-administered questionnaire which can be viewed at http://www.alexandria.unisg.ch/Publikationen/Christian_Laesser/38135. By means of the questionnaire, the following flight related information was collected: flight data, flight travel propensity (number of business and leisure flight trips in the past 12 months) upstream choice of transportation, assessment of different developments in terms of air connectivity (for hypothesis 5, where Kano methodology was applied for the analysis; see below). The item battery for the latter can be viewed in the appendix. Additionally, "standard" questions on socio-demographic issues were included, such as location of residence, location of workplace (both geo-coded), profession, education, industry/ branch of employer, professional position.

Data collection: For this study, data from air passengers was collected in the week from June 24-30, 2006 at Zurich International Airport. Overall, 3'900 persons were intercepted at different gates (i.e. flights) and handed out the questionnaire. 2'834 returned that questionnaire (either directly at the gate or via surface mail), of which 2'824 could be used for the analyses in this paper.

Data preparation: For reasons of simplification, and for the testing of hypotheses 4-6, quintiles of the number of annual business flights (and not the number of flights itself) were included in the analyses. This form of data preparation revealed the following delimitations (range of number of annual business flights): 1st Quintile: <0.4; 2nd Quintile: 0.4 - 1.9; 3rd Quintile: 2.0 - 6.9; 4th Quintile: 7.0 - 18.0; 5th Quintile: > 18.0. Hence, the majority of demand in Zurich airport is generated from frequent flyers. Additionally, the data with regard to hypothesis 5 was prepared according to Kano methodology.

Data analyses: The analyses consisted - depending on the scales - mostly either of means comparisons (including ANOVAs to check if distributions were based on mere chance or significant) and cross tabs/ contingency analyses (including X^2 tests to check if distributions were based on mere chance or significant). In one case (hypothesis 5), Kano methodology was applied to test if a actual/ real or potential state of air connectivity was considered a must-be, one-dimensional, or attractive requirement (for methodology issues please refer to Kano et al., 1984; Berger et al., 1993). This can be achieved by aggregating a functional and dysfunctional form of the same question against each other. Basically, in a

- must-be state of requirement, there is an over-proportional relation between the absence of a product attribute and the customers state of dissatisfaction; the presence of a product attribute (i.e. flight connectivity) can only prevent dissatisfaction but not generate satisfaction;

- one-dimensional state of requirement, there is a linear relation between the presence/absence of a product attribute and the customers state of satisfaction;
- attractive state of requirement, there is an over-proportional relation between the presence of a product attribute and the customers state of satisfaction; the absence of a product does not generate dissatisfaction.

5. Results and discussion

Results are presented and discussed along the structure of the hypotheses.

5.1 Hypothesis 1

Wordings: The "higher" a traveller's professional position, the more flights he/ she completes.

Test Methodology: Means comparison and ANOVA of number of business flights in relation to the professional positions.

The **results** (presented in table 1) support the hypothesis. There are significant differences ($F=17.086$, $\text{Sig.}=.000$) between professional positions and number of annual flights.

Table 1: Results of hypothesis 1

Professional position	Mean	Std. Dev.
CEO, Chief public servant	20.65	23.98
Middle Management	13.15	19.20
<i>Overall</i>	<i>11.99</i>	<i>19.31</i>
Free profession (MD, Lawyer, Consultant, Artist, etc.)	9.64	15.47
Employee	7.95	13.79
None of the tested professions	7.71	20.46
Self employed in trade and commerce	7.00	14.94
Craftsman/ worker	6.01	13.83
Farmer	4.08	7.95
Military service	2.27	4.19
In training: apprenticeship	2.21	4.53
Housework	1.95	6.87
In training: student	1.41	3.74
Unemployed, looking for a job	0.94	2.08
Pensioner	0.76	1.97
In training: middle school	0.75	2.67

Discussion: Persons in leading managerial functions tend to fly significantly more than persons in a majority of other professional positions. This can be explained - among other - by the high communicative exposure of such persons in a mostly international or even global business environment (cf. to hypothesis 3).

5.2 Hypothesis 2

Wording: The higher the export orientation of the industry a traveller is working in, the more flights he/ she completes.

Test Methodology: Means comparison and ANOVA of number of business flights in relation to the branches/ industries the test person works in.

The **results** (presented in table 2) support the hypothesis at least in terms that there are significant differences between branches/ industries. ($F=2.642$, $Sig.=.000$) and number of annual flights.

Table 2: Results of hypothesis 2

Industry (NOGA)	Mean	Std. Dev.
Aviation	18.51	32.32
Information technology	17.02	24.97
Chemical industry	16.04	19.25
Banking and credit industry	16.00	24.69
Engineering	15.17	21.02
Trade and maintenance of cars	14.15	19.27
Professional services	13.97	17.95
Wholesale	13.44	17.31
Telecommunication	12.00	22.81
<i>Overall</i>	<i>11.99</i>	<i>19.31</i>
Metals industries	11.55	22.61
Insurance industry	10.90	11.94
Arts and entertainment, sports	10.85	15.55
Research and development	10.31	16.21
Real estate	9.49	15.43
Personal services	7.61	15.02
Retail trade and maintenance	6.35	9.62
Health and social industry	6.29	10.62
Hospitality industry	5.43	18.62
Education	4.49	8.79
Public administration	2.88	5.35

Discussion: Despite the significance in the results, the picture in terms of export orientation of the industries tested is not really clear. One could claim that information technology, chemical industry, banking and credit industry as well as engineering is export prone; however, this is not the case with the trade and maintenance of cars, which is more import oriented. This result is a first indication of the potential result of hypothesis 3, where not the industries are subjects of analysis but the degree and geographical distribution of communication and interaction an industry generically generates.

5.3 Hypothesis 3

Wording: The higher a traveller's share of regular interaction/ communication with contacts outside of Switzerland, the more flights he/ she completes.

Test methodology: Stepwise regression of the pro-rata origin of professional partners (within own institution as well as other/ external institutions) towards the annual number of business flights.

The **results** (presented in table 3) support the hypothesis. The adjusted R² of the regression = .269, with a standard error of estimate = 14.852. The coefficients are all positive and significant from 0.

Table 3: Coefficients with regard to hypothesis 3

Coefficients	B	Std. Error	Beta	t	Sig.
Constant	-1.941	1.129		-1.719	.046
Pro-rata share of neighbouring countries	.264	.036	.281	7.239	.000
Pro-rata share of Europe	.305	.041	.294	7.409	.000
Pro-rata share of overseas	.245	.041	.235	5.940	.000

Discussion: The differences with regard to the coefficients could be interpreted in a way, according to which it is contacts within Europe except the neighbouring countries which drive demand for business travel. Trips to the neighbouring countries are likely and often substituted by alternative means of transport (train or car) whereas communication with persons in areas outside of Europe is often not face-to-face (and thus by means of a flight) but likely also by other means of communication (phone, mail, etc.).

5.4 Hypothesis 4

Wording: The more often a traveller takes a plane, the closer to the airport he works.

Test Methodology: Means comparison and ANOVA of time distance (public=train, bus etc. and individual=car transport) of the workplace from the airport in relation to the quintiles of number of business flights.

The **results** (presented in table 4) support the hypothesis ($F=3.987$, $\text{Sig.}=.003$ with regard to public transport; $F=3.658$, $\text{Sig.}=.006$ with regard to individual transport) and number of annual flights.

Table 4: Results of hypothesis 4

Number of business flights	Time needed with public transport from workplace to airport		Time needed with private transport from workplace to airport	
	Mean	Std. Dev.	Mean	Std. Dev.
1 st Quintile (<0.4)	82.67	3.51	50.82	2.48
2 nd Quintile (0.4 - 1.9)	76.48	4.13	46.93	3.31
3 rd Quintile (2.0 - 6.9)	73.56	4.10	44.52	2.95
4 th Quintile (7.0 - 18.0)	66.36	3.31	38.27	2.63
5 th Quintile (> 18.0)	64.92	4.00	39.52	3.10

Discussion: The marginal time saved between the 1st and the 5th quintile amounts to 18 minutes (22%; public transport) and 11 minutes (22%; private transport). Interestingly, the ratio $\frac{\text{private transport}}{\text{public transport}}$ is more or less constant with 0.61, which is an indication that workplace locations of frequent flyers do not have necessarily better access by public transport than by private transport (at least what the connectivity with the airport is concerned).

5.5 Hypothesis 5

Wording: The more often a traveller takes the plane, the more critical is his attitude towards potential limitations of air connections.

Test Methodology: Contingency analysis and Chi-square test of the quintiles in the number of business flights in relation to the assessment of air connectivity (unrestricted vs. restricted) which was measured according to Kano methodology.

The **results** (presented in table 5) support the hypothesis ($X^2=92.063$, Sig.=.000)

Table 5: Results of hypothesis 5

↓Type	Quintiles→	1 st	2 nd	3 rd	4 th	5 th
(1) Attractive requirement		8.8%	8.5%	8.0%	6.9%	7.3%
(2) One dimensional requirement		30.5%	35.2%	43.9%	44.7%	49.7%
(3) Must-be requirement		12.4%	17.1%	15.7%	16.4%	18.5%
(4) Indifferent, questionable, rev.		48.2%	39.2%	32.3%	32.0%	24.5%
(2) + (3) -> pot. dissatisfaction		42.9%	52.3%	59.6%	61.1%	68.2%

Discussion: The more a person flies for business reasons, the likelier will limitations of air connections contribute to his/ her dissatisfaction. It is not only the share of the state *flight connections* = *one dimensional requirements* which increases along an increase in number of flights but also the share of the state *flight connections* = *must be requirement*. The combined shares of these two states increase from 42.9% (1st quintile) to 68.2% (5th quintile).

5.6 Hypothesis 6

Wording: The more often a traveller takes the plane, the rather he favours an (a) increase (b: decrease) in numbers of flights to given destinations instead of the (a) introduction (b: cancellation) of new destinations when flights from a given airport generally (a) increase (b: decrease).

Test Methodology: Contingency analysis and Chi-square test of the quintiles in the number of business flights in relation to the preference either for a (a: positive; b: negative) change in the number of destinations or (a: positive; b: negative) change in the number of connections to given destinations.

The **results** (presented in table 6) support the hypothesis in the case of an increase of connections (hypothesis a; $X^2=126.772$; Sig.=.000). In contrast, and in the case of a decrease of connections (hypothesis b), there is no clear picture ($X^2=6.186$, Sig.=.168), which is why this partial hypothesis has to be rejected.

Table 6: Results of hypothesis 6

↓Description	Quintiles→	1 st	2 nd	3 rd	4 th	5 th
<u>a: Increase of connections</u>						
Number of destinations		63.5%	61.1%	65.9%	56.5%	53.9%
Connections to exist. destinations		36.5%	38.4%	34.1%	43.5%	46.1%
<u>b: Decrease of connections</u>						
Number of destinations		49.8%	43.4%	44.0%	48.5%	50.0%
Connections to exist. destinations		50.2%	56.7%	56.0%	51.5%	50.0%

Discussion: When from a given airport the number of flights increase, frequent business travellers prioritize an increase of connections to existing destinations as opposed to the introduction of new destinations.

6. Conclusions

The results in summary reveal that frequent air travellers as opposed to non frequent ones supposedly hold comparably higher office, and work in industries and environments which communicate intensively with nodes outside of Switzerland (especially in non-neighbouring European countries). Such workspaces are located comparably close to the airport. Additionally, frequent flyers as opposed to on frequent ones have a more critical attitude towards potential limitations of air connections and have a preference for frequency instead of direct destinations accessibility.

From those results we can draw a number of conclusions. (1) First of all, the formation of the quintiles with regard to flight frequency revealed that the large majority of air passengers at Zurich airport are frequent flyers. This could be an indicator of the fact that Switzerland has high shares of workplaces (such as headquarters) which generate significant air traffic, due to the necessity of communication within and to Europe as well as overseas. (2) Secondly, industries as well as a dominant position of workplaces which are prone for high flight frequency are associated with location decisions close to the airport. Hence, one could argue that the presence of an airport and of air connectivity at least supports or is associated with high qualifications workplaces, which in turn are associated with and part of an international production or service network. (3) It is (unfortunately) the quintile with the most frequent flyers which also are the most sensible/ critical towards any limitations in connectivity. The more a person flies, the more he/ she is demanding a high number of frequency (leaving him options to travel) before a high number of direct connections. Hence, opposition to such measures is founded and possibly funded by a rather powerful group of people. (4) If limitations are inevitable, and the airport has to implement limitation strategies, the airlines are well advised to rather secure existing frequencies to a smaller selection of destinations than to secure the accessibility to the existing number of destination by means of a smaller frequency (reduce destinations before frequency).

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8. Appendix: Item battery for the assessment of the actual and potential air connectivity.

The questions below were assessed according to the following Kano-Scale: I think that's good (2); I require that (1); I don't care (0); I accept that (-1); I think that's bad (-2).

Questions describing the current state:

- a) How do you judge today's flight offers from Zurich to Europe (approximately 530 flights per day).
- b) How do you judge today's flight offers from Zurich to Africa (approximately 11 flights per day).
- c) How do you judge today's flight offers from Zurich to the Middle East (approximately 14 flights per day).
- d) How do you judge today's flight offers from Zurich to the Far East (approximately 15 flights per day).
- e) How do you judge today's flight offers from Zurich to South-/ Central America (approximately 2 flights per day).
- f) How do you judge today's flight offers from Zurich to North America (approximately 23 flights per day).

Questions describing the dysfunctional state:

- g) As mentioned above, there are 530 flights per day offered from Zurich to Europe. How would you evaluate a reduction to 424 flights per day?
- h) As mentioned above, there are 11 flights per day offered from Zurich to Africa. How would you evaluate a reduction to 9 flights per day?
- i) As mentioned above, there are 14 flights per day offered from Zurich to the Middle East. How would you evaluate a reduction to 11 flights per day?
- j) As mentioned above, there are 15 flights per day offered from Zurich to the Far East. How would you evaluate a reduction to 12 flights per day?
- k) As mentioned above, there are 2 flights per day offered from Zurich to South and Central America. How would you evaluate a reduction to 1 flight per day?
- l) As mentioned above, there are 23 flights per day offered from Zurich to North America. How would you evaluate a reduction to 18 flights per day?

Questions describing the functional state:

- m) As mentioned above, there are 530 flights per day offered from Zurich to Europe. How would you evaluate an increase to 636 flights per day?
- n) As mentioned above, there are 11 flights per day offered from Zurich to Africa. How would you evaluate an increase to 13 flights per day?

- o) As mentioned above, there are 14 flights per day offered from Zurich to the Middle East. How would you evaluate an increase to 17 flights per day?
- p) As mentioned above, there are 15 flights per day offered from Zurich to Far East. How would you evaluate an increase to 18 flights per day?
- q) As mentioned above, there are 2 flights per day offered from Zurich to South and Central America. How would you evaluate an increase to 3 flights per day?
- r) As mentioned above, there are 23 flights per day offered from Zurich to North America. How would you evaluate an increase to 28 flights per day?
- s) Airlines can offer flights unrestricted from Zurich.