

Fare Competition

A route to
climate-friendly
travel choices



May 2021

Possible.
Inspiring climate action

Possible.

Inspiring climate action

Possible is a UK based climate charity working towards a zero carbon society, built by and for the people of the UK. Our A Free Ride campaign aims to protect access to reasonable levels of flying for the less well-off, whilst maintaining aviation emissions within safe limits for the climate.

Charity number: 1157 363

www.wearepossible.org

www.afreeride.org

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Data collection



Survation surveyed 1,009 people aged 18+ in the UK on their attitudes towards international travel. Fieldwork was conducted 8-12 April 2021. Data were weighted by age, sex, region, household income, education level, 2019 general election vote and 2016 EU referendum vote.

Survation also conducted an online focus group with six members of the public who fly up to twice per year and conducted four in-depth interviews with frequent flyers - defined as those who fly three or more times per year for leisure purposes. Fieldwork was conducted on 8-9 April 2021.

Contents



Introduction	5
Executive summary	7
Key findings	7
Recommendations	9
People's plans for overseas travel	10
Understanding of flights' impact on the climate	13
The role of cheap flights	17
Making train travel the easiest option	23
Investment in climate-friendly travel	25
Support for Climate Perks	28
Need for a frequent flyer levy	30

Introduction



Poll after poll shows that people in the UK want to see urgent action to tackle the climate crisis.¹ To cut emissions fast enough to protect people from the impacts of climate change, all sectors will need to play their part – including aviation, which accounts for 10% of the UK’s carbon emissions.² Yet we still have an international travel system that makes it unnecessarily hard for people to do the right thing. Nine out of the ten most popular countries visited by people who live in the UK are within Europe,³ and could be reached without flying. Yet while taking a plane does around ten times more environmental damage than the same journey by train,⁴ flying often has a lower ticket price – or is perceived to do so. This is due in part to the generous tax breaks given to the aviation industry, which amounted to around £7bn per year before Covid.⁵

People in the UK care a lot about the climate but, for many, paying more to travel by train rather than plane isn’t an option. It’s not realistic or fair to expect individuals to change their behaviour to cut emissions under a system which rewards the most polluting form of transport with generous tax breaks.

This report explores how people in the UK think about what method of transport to use for leisure travel,⁶ and what would need to change for them to be able to choose ways of travelling which are better for the climate. As well as discussing travel choices and their impact on the climate with people who represent the majority of UK residents who don’t fly more than once per year, we also talked with frequent flyers – the minority of the UK population who take the vast majority of flights. Just 15% of UK residents, those who

¹For example, www.globalwitness.org/en/press-releases/yougov-poll-finds-majority-british-public-want-uk-lead-world-tackling-climate-change/
² www.aef.org.uk/what-we-do/climate/
³ www.finder.com/uk/outbound-tourism-statistics
⁴<https://drive.google.com/file/d/0B3iR8zslDVogb3I4MDVZckNRQIM0aE1lcjRjaVpGS2NUV3Zv/view>
⁵<https://neweconomics.org/2020/06/crisis-support-to-aviation-and-the-right-to-re-train>
⁶ Business flights account for only around one in ten visits overseas by UK residents: www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2019#uk-residents-visits-and-spend-abroad

fly three or more times per year, take 70% of all the flights.⁷ We explored the perspectives of people who fly often, and what changes would be needed to encourage this group to move towards more climate-friendly ways of travelling.

With ways to fly without producing emissions decades away at best, it's clear that tax and policy changes are required now to make it easier for people to choose modes of transport that don't harm the climate, and to discourage frequent flying. The views which emerged from these discussions add to previous findings of high levels of support for a frequent flyer levy. People were also in favour of moving government financial support for international travel towards improving the affordability and convenience of train travel, rather than the current tax exemptions for airlines.

Rushing back to the high levels of aviation of the time before Covid would threaten the UK's climate targets. The current pause in air travel provides an opportunity to think about what an effective system of international transport would look like - one which cuts emissions to protect the climate, while ensuring that people can still travel. A recurring theme in our discussions about travelling was the high value people place on their annual holiday and time with their family. In an age of climate crisis, transport policy needs to support that mobility, which plays such an important role in people's quality of life, by making it easier and more affordable to travel in a way that's safer for the climate.

⁷<https://s3-eu-west-1.amazonaws.com/media.afreeride.org/documents/FFL+Modelling+paper.pdf>

Executive Summary



Key findings

- Cost is a vital factor when people are deciding how to travel abroad, and the low cost of flights to Europe is a key motivator for people to choose plane travel rather than trains. 40% of people polled said that it would be 'essential' for a train journey to be cheaper than travelling by plane before they would consider train travel, and another 41% said that this would be helpful. Clearly, the issue of cost needs to be addressed for people to switch from subsidised low-cost flights to ways of travelling with lower carbon emissions.
- Two-thirds of people are willing to consider travelling without flying at least some of the time. Encouragingly, 42% of people surveyed told us that, when international travel resumes, they would consider travelling without flying most or all of the time, with another 24% willing to consider it for less than half of the times they travel. However, this would need to be supported with government investment in rail travel and changes in aviation tax to ensure that flights are not significantly cheaper than the lower carbon options.
- Only half (47%) say that they are aware that flying produces around 10 times more emissions than the same journey by train - and choosing a low carbon form of travel is a low priority for most people at present.
- Investing in the train network, particularly for trips to accessible parts of Western Europe (France, Netherlands, Belgium, Germany) would be welcomed as an alternative to taking short flights.
- Higher earners are more likely to be planning trips abroad in 2021, with only 30% of those with a household income of £40,000 or more planning to forgo a foreign trip this year, compared to 55% of people with a household income below £20,000.

- The “Climate Perks” scheme, which offers extra holiday allowance for those picking climate-friendly train travel over plane journeys, is an attractive proposal for employees, with 61% of 18-34 year olds stating that they would prefer an employer offering this perk.
- Contrary to the aviation industry’s claims that flights are essential for business, just 7% of people said that work trips would be their priority for international travel. Almost three times as many people (38%) said that going on holiday would be their priority, than visiting family overseas (13%).



Climate Perks is an employee benefits scheme. Climate Perks employers offer their staff a number of paid ‘sustainable travel days’ on top of their annual leave, typically two to four days per year. If employees choose climate-friendly transport (trains, ferries, coaches) to reach their holiday destinations, they can use their ‘sustainable travel days’ to cover any additional travel time incurred as a result, ensuring that none of their annual leave is lost due to travel time.

More info: www.climateperks.com

Recommendations

- More government support to improve the affordability and accessibility of train travel, to ensure price isn't a barrier stopping people from travelling in the most climate-friendly way.
- An end to tax breaks for aviation which make flying artificially cheap, including the introduction of a tax on kerosene.
- Replace Air Passenger Duty with a progressive tax on flying, such as a frequent flyer levy or air miles levy, to discourage people from taking multiple flights per year - as supported by the UK Climate Assembly.⁸
- Increased tax revenue from air travel should be ring-fenced for reinvestment in alternatives, including fibre broadband and improved international rail travel to key destinations.
- Employers should join the Climate Perks scheme to demonstrate climate leadership and support their employees to travel in ways which protect the climate.
- Following Amsterdam's decision to ban metro adverts for fossil-fuel powered cars and cheap flights,⁹ the UK government should lead the way by banning adverts for flights, along with other high-emitting products and services. It should also ensure that adverts for flights don't give a misleading or unrepresentative impression of the cost of flying, which can lead to customers refusing to consider train travel.¹⁰

⁸ www.climateassembly.uk/recommendations/index.html

⁹ <https://verbiedfossielereclame.nl/first-step-amsterdam-is-banning-advertising-for-fossil-fuel-products-from-the-subway-stations/>

¹⁰ www.researchgate.net/publication/286933552_European_Air-Rail-Bus_Price_Comparison_Final_Report

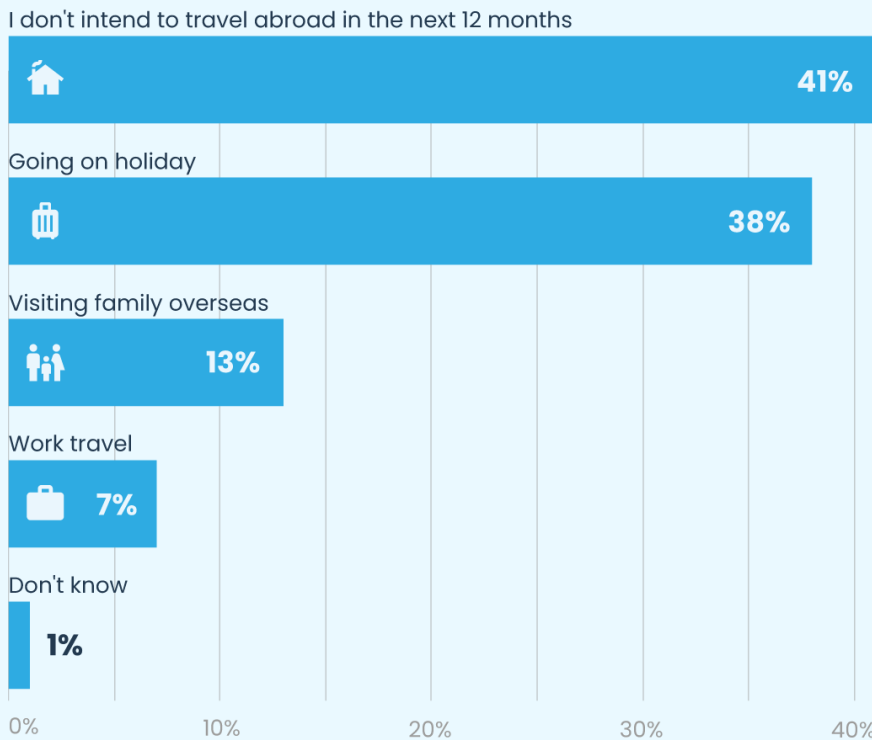
People's plans for overseas travel

As lockdown lifts, frequent flyers are already planning flights abroad for 2021 and beyond



Going on holiday is the most commonly cited priority for those who are planning on travelling overseas in the next 12 months (38%). Higher earners are almost twice as likely to be planning a trip abroad over the next year than those on lower incomes: 55% of people earning less than £20,000 say they are not intending to make any international journeys any time soon, while only 30% of those on £40,000 or more say they will forgo overseas travel. Overall, 41% said they do not intend to travel abroad in the next 12 months.

When the Covid-19 crisis eases, which of the following would be your priority for international travel in the next 12 months?



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As lockdown eases, participants in the focus group are turning their attention to planning holidays, with the majority looking to holiday in the UK this year and some already having booked a summer vacation. Looking ahead, most

were hoping to be able to travel overseas in 2022, with holidays in Europe planned for most – and little intention to ditch foreign travel once the pandemic has passed and restrictions are lifted. Most of the focus group took a trip abroad once a year or every two years, and are keen to resume holidays abroad in the near future. Whilst some people recognised that they had enjoyed discovering places closer to home in the UK, most intended to travel abroad again once they had the opportunity and freedom to do so.

Frequent flyers, who flew at least three times a year, often had holidays booked overseas for 2021 – including holidays that had been postponed or rolled over from 2020. Some had used airmiles to secure flights that they planned to rebook if travel was not possible. The frequent flyers highly prioritised travel abroad, often booking a mix of long haul and short haul trips each year.

Participants admitted that the pandemic had encouraged them to appreciate the benefits of clearer skies and less pollution, but for most people this did not translate into a desire to travel less or to forgo their annual overseas holiday. While some do feel concern about their carbon footprint and express a desire to be balanced in their travel plans, there is also a sense that they will not change habits without a stronger incentive to do so. Frequent flyers were even more likely to defend their travel habits than those travelling twice per year or less.

“I think it's a balance. I wouldn't want to be jetting around all over the place for short trips but I think there are a lot of benefits for my family to have a week away once a year”

Female, 41 years, Reading





“Environmentally, I’d like to travel less but I think one flight abroad a year is ok”

Male, 55 years, London

“There will be more willingness to look at alternatives after the pandemic, but it would also be what fits in with our lifestyles”

Frequent flyer, male, 25 years, London



Understanding of flights' impact on the climate

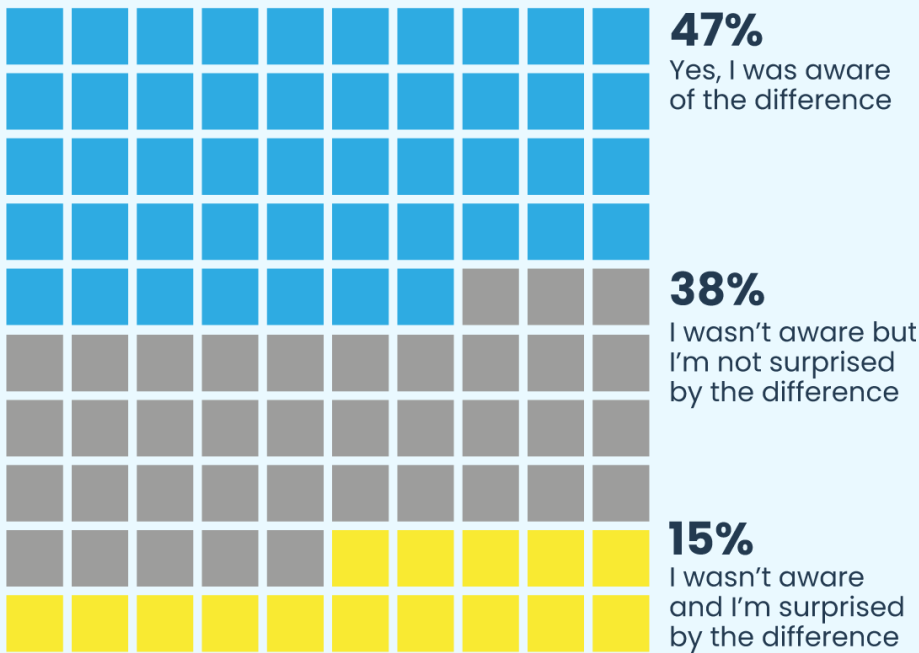


Most people know that flying is more damaging to the environment than taking the train, but information on its own isn't enough to prompt behaviour change.

We asked people whether they were aware that on average, flying produces around ten times more greenhouse gas emissions, which cause climate change, than taking a train for the same journey. For example, taking Eurostar from London to Paris rather than flying produces just 6% of the emissions of the same journey by plane.¹¹ In general, there was good awareness among respondents on the relative impact on the climate of taking a flight compared to other forms of transport. Almost half (47%) stated that they were already aware of the difference in emissions between train and plane travel; a further 38% were unaware but unsurprised by the difference. Awareness was highest among the young, with 53% of 18-34 year olds aware of the difference in climate impacts.

¹¹ www.eurostar-treadlightly.com/en/environment.php

In general, are you aware of the difference in emissions between journeys by plane and journeys by train?



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Focus group participants also knew that flying generated more carbon emissions than other forms of transport such as using a train or coach. However, when prompted they were surprised to learn the size of the disparity between the different forms of transport, and that flying to Paris generates approximately ten times as much carbon emissions as taking the train.

Giving people information about the emissions produced by different forms of transport for a particular journey may help people to make an informed choice, but on its own it is unlikely to change individual behaviour. Most people who take up to two flights per year assumed that reducing their low number of flights was unlikely to make a significant difference to carbon emissions overall. Frequent flyers defended their decision to fly by benchmarking themselves to others, such as public figures and celebrities, who fly more than they do. They also defended decisions by talking about other actions they take to reduce their carbon footprint - for example, reducing their meat consumption, recycling, shopping locally or buying sustainable products. This suggests a need for greater consumer awareness of the impact of cutting down on flying, compared to other actions to protect the environment such as recycling; avoiding one

transatlantic flight reduces emissions eight times more than recycling.¹²

“We don’t think about carbon footprint when we are flying because it is a small part of our impact.... trips we are making 3-4 times per year is OK, flying is insignificant in comparison to other lifestyle choices. Celebrities are always talking about their carbon footprint and they jet off everywhere”

Frequent flyer, male, 60 years, Watford



“I do recycle and look for sustainable products but [carbon emissions] is low on the list of priorities when I am flying”

Frequent flyer, female, 35 years, Leeds

In the focus group and in-depth interviews we showed participants the information that 70% of flights in the UK are taken by only 15% of the population. There was some surprise that such a small group of people take most of the flights. However, while frequent flyers were generally surprised that only 15% of people accounted for such a high number of flights, they were not “put off” to find that they were within this category.

Frequent flyers appreciated that they had the lifestyle and means to afford to fly more often than most people, but this wasn’t a strong deterrent on its own. They often felt privileged to be in a position to afford luxuries, but they also felt that travel is highly aspirational and other people would do the same if they could. A sense of “fear of missing out” was expressed by some – and that if they didn’t take flights then someone else would.

¹²www.kimnicholas.com/responding-to-climate-change.html

“85% of people don’t travel regularly but they do aspire to travel more, they aspire to travel and have more leisure time”

Frequent flyer, male, 60 years, Watford



“I don’t feel privileged or an elite, we take flights, we go on holidays and visit family. It’s not a huge amount”

Frequent flyer, male, 60 years, Watford

“[Being in the] 15% doesn’t really bother me, I would think other people are not going to change their travel so why should I?”

Frequent flyer, female, 35 years, Leeds



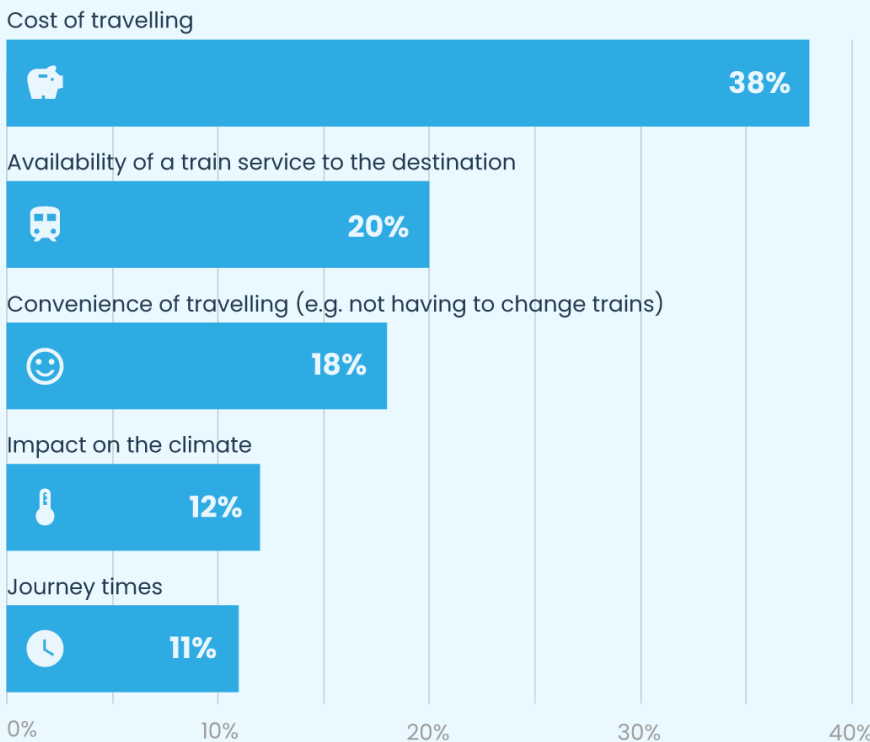
The role of cheap flights

Cheap flights are deterring people from taking more climate-friendly travel options



When we asked respondents to rank the importance of different factors when deciding whether to take a trip by plane or a more climate-friendly alternative, the cost of travelling was rated the most important factor by all demographic groups, cutting across age, gender, region, income, education level and political affiliation; overall, 38% said that cost was most important when choosing their mode of transport. Just 12% cited impact on the climate as their primary consideration, and a majority of 51% placed this as the issue of least concern, with 54% of high earners ranking it fifth of five (compared to just 18% of those on lower incomes).

When holiday travel can resume, which of the following factors will be most important when deciding on whether to travel by plane or take a form of transport that's better for the climate?



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“If I was a frequent flier it [impact on climate] would have more of an impact on me – the people who fly commute or fly regularly for business are having far more of an effect than my one holiday of the year”

Female, 29 years, Reading



“I would consider the train for shorter journeys, but the cost would influence me more than emissions... It would be far down the list”

Female, 35 years, Leeds

This was echoed when we asked what conditions would need to be in place before people felt able to travel without flying. 40% said that it would be essential for the train journey to be cheaper than the same trip by plane (another 41% said that would be helpful, and 50% said that the train journey would need to not cost significantly more than a flight).

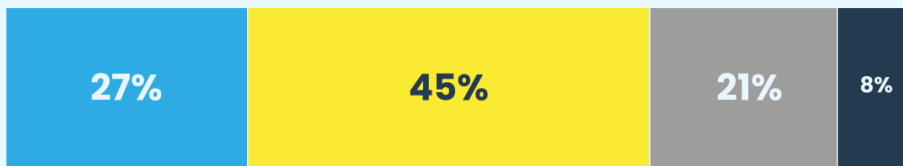
In order for you to choose to travel without flying, which of the following would need to be in place?

● Essential ● Helpful ● Not relevant ● Don't know

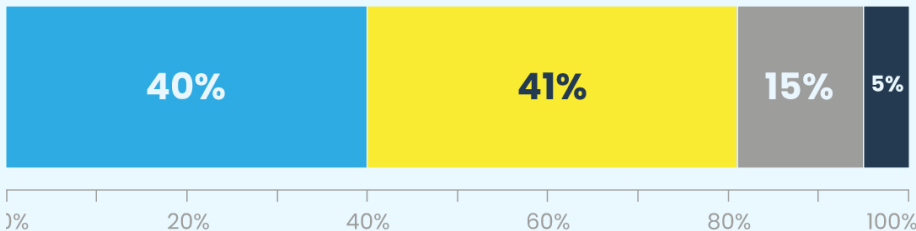
The train journey would need to **not cost significantly more than** the plane journey



The train journey would need to **be the same price as** the plane journey



The train journey would need to **be cheaper than** the plane journey



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While cost was felt to be a key factor, there is some evidence to suggest that flights' affordability compared to train travel may be more of a consumer perception than a reality, at least for some routes. Research comparing the cost of different modes of transport within Europe found that overall rail was actually cheaper than plane travel.¹³ This study suggests that customer perceptions of the low cost of air travel compared to other methods of transport is a result of airline marketing, which promotes very low fares which represent only 10% or less of the seats available. These prices, while not representing typical costs of air travel, have become consumers' reference point and affected booking behaviour, making travellers less likely to explore alternatives to flights.¹⁴

One in three (31%) said they would need more information and guidance on sustainable alternatives before they could switch from air travel. While more people felt that there was

¹³www.researchgate.net/publication/286933552_European_Air-Rail-Bus_Price_Comparison_Final_Report

¹⁴www.researchgate.net/publication/286933552_European_Air-Rail-Bus_Price_Comparison_Final_Report

ample information available on travelling by plane than thought the opposite (45% vs. 44%), pluralities wanted to see more information on travelling by train (49%), ferry (48%) and coach (46%).

Do you feel that there is enough information available on each of the following travel options, including their carbon emissions and environmental impact?

● I would like more information ● There is enough information ● Don't know

Plane



Train



Ferry



Coach



0% 20% 40% 60% 80% 100%

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Focus group participants were very clear that cheap flights and low-cost holidays in Europe made the prospect of flying abroad very attractive. Cost was a key factor in decision making, and as long as flights are seen to be significantly cheaper than other travel options and trains are seen to be more expensive, there is little incentive to choose a lower carbon alternative. Whilst aviation continues to benefit from government subsidies and support and lack of costs or penalties associated with carbon emissions, it is unlikely that travellers will be tempted away from cheap and affordable flights. Some noted that it costs more to holiday in the UK than abroad, due to the cheap prices of flights and holiday packages on the continent.

“It comes down to price for me, rather than the effect it has on the environment. That flight will still be going whether I’m on it or not!”

Female, 29 years, Reading



“I don't mind if it's a bit more than flying or a bit longer, but not three times the price and three times the time”

Male, 55 years, London

“I would be more persuaded to travel by train if I could get much better prices, which the government can help with”

Female, 41 years, Reading



Alongside cost, people also cited speed, choice and ease of travel as key factors in decision making. Concern about the length of journey time for train travel, combined with a lack of direct trains to popular destinations, were off-putting. Those with families and younger children were most resistant to finding an alternative to flying because of the longer time in transit and the potential upheaval of switching between multiple connections. Some people commented that they expected to experience more delays with trains than planes, and the possibility of missed connections and difficult transfers between stations made the prospect of train travel less appealing at present. However, delays seems to be more of a concern among travellers, than a real problem – in the EU in 2018, regional and local passenger rail services were punctual 90% of the time and long distance and high-speed

trains were punctual 79% of the time,¹⁵ compared to 76% punctuality for planes.¹⁶

“Time I also agree with. A precious week in a year for a holiday – you want to be there having fun for as many hours as possible”

Female, 41 years, Reading



“If travelling to Spain there are dozens of flights per day to choose from. If I went by train it would be much longer and less choice. I’d expect it to be much more expensive”

Frequent flyer, male, 60 years, Watford



¹⁵<https://ec.europa.eu/transport/sites/transport/files/com20210005-7th-rmms-report.pdf>

¹⁶ www.eurocontrol.int/sites/default/files/2019-05/coda-digest-annual-2018.pdf

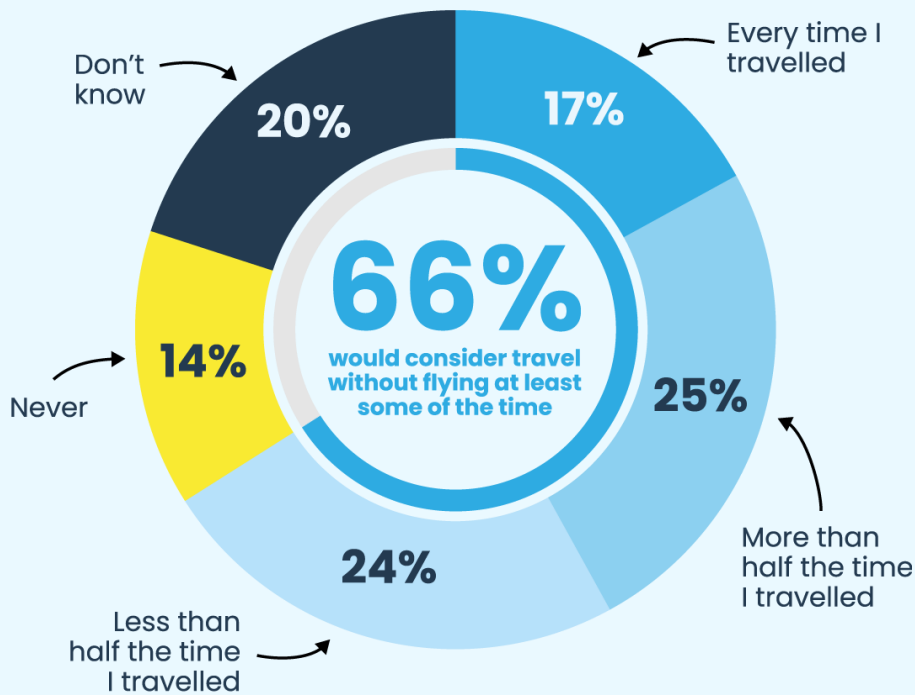
Making train travel the easiest option

There's a willingness to consider travelling without flying, but this needs to be supported by action to make train travel more accessible



Encouragingly, 42% of people surveyed told us that, when international travel resumes, they would consider travelling without flying most or all of the time. A quarter (24%) said they would consider alternatives to air travel less than half the time they travel, and only 14% said that they would never consider choosing a lower carbon option.

When international travel resumes, how often, if at all, would you consider travelling without flying?



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We saw in the focus group that there was a willingness to explore travelling without flying, particularly for trips within Western Europe, such as to France, Netherlands, Belgium, Germany or even northern Spain. Participants felt that for these more accessible destinations, the benefit of easier

check-in by train and city centre train stations would have an advantage over using the airport for a short flight. It was also felt that these types of trips could be made more appealing by the ability to take a direct train, or a journey with minimal changes, which would make the train journey easier and more convenient for travellers. There was much less appetite for taking the train further afield in Europe or beyond. Overall, there was high appeal for more investment in train services linking the UK to Western European cities, along with more incentives for travellers to choose the train rather than carbon intensive flights for such short trips.

We also found that participants would use Google or websites such as TheTrainline.com to explore train travel options beyond the UK, but they were not clear how to source the best deal or compare options. Greater awareness is needed of services¹⁷ that provide easier and more accessible ways for travellers to search for international train travel, or compare flights against trains, as it seems that this would make decision-making easier and be welcomed by many.

“The most effective way [to reduce flights] is to hit people in the pocket, otherwise I don’t think people will change their flying habits, as most people live for the now and don’t think that far ahead”

Frequent flyer, female, 35 years, Leeds



¹⁷ Such as www.raileurope.com/en-gb and upcoming sustainable travel platform vojo.me

Investment in climate-friendly travel

Support for increased tax on airlines and government investment in improved and cheaper train travel to Europe



Whilst flying is clearly the 'default' mindset for many people, there were perceived to be benefits from taking the train, particularly for younger people, those without children and retirees. Train travel was felt to be potentially relaxing and enjoyable for some people, particularly if they were able to get a direct train or one without multiple connections. There is more space on a train to move around and the ability to enjoy the sense of travelling through different countries, which is particularly enticing for those with more time. Avoiding the airport experience was a draw for some travellers, who did see the benefit of travelling directly from city centre to city centre, avoiding the need to travel to and from airports. However, these benefits were still likely to be overshadowed by a cheaper cost of flying and the inconvenience of indirect train travel and irregular train connections.

In order for you to choose to travel without flying, which of the following would need to be in place?

● Essential ● Helpful ● Not relevant ● Don't know

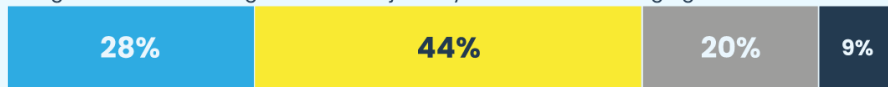
Being able to book a direct train to my destination (no changes)



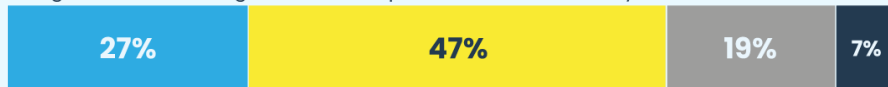
Availability of clear information and guidance to sustainable alternatives to flying



Being able to book a single ticket for a journey that involves changing trains



Being able to book a night train or sleeper train with beds to my destination



Additional paid "sustainable travel days" to cover extra travel time



0% 20% 40% 60% 80% 100%

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While people are reluctant to forfeit the benefits of cheap airline tickets, there is support for balancing the costs of flights and train travel - investing more in the international rail network and reducing the costs of train tickets from the UK to European destinations. Participants felt that there was a role for the government to invest in train travel and ensure that the cost differential is narrowed.

"For me I would definitely consider going by train. Less hassle and you can rest and look at the views without having to concentrate on driving and the stress of traffic jams and queues"

Male, 66 years, Hertfordshire





“I would already support a call for government and business to make train travel easier and cheaper”

Male, 66 years, Hertfordshire

“If the government could subsidise travel by train and improve the efficiency and reliability of train travel, that would make it much more compelling”

Female, 41 years, Reading



Support for Climate Perks

Extra days of paid leave to travel without flying is an appealing solution – particularly for under 35s



Climate Perks employers offer paid ‘sustainable travel days’ on top of annual leave in order to support their employees to take holidays without flying. A majority (54%) of respondents found this an appealing idea. It was especially popular among the young, with 61% of 18-34 year-olds telling us they would prefer to work for an employer which offers Climate Perks.

Which of the following statements best reflects your view on Climate Perks?



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In the focus group the idea of Climate Perks was also welcomed, particularly for those who worked in private sector companies. The Perks scheme was more attractive to those travelling without children, for whom considerations such as school holidays may make the additional travel days less of an incentive. Some were also concerned about how the scheme would be managed and policed, so more

information was required. However, it is seen to be a perk which would provide a positive view of employers.

“Climate Perks is great! I don't want to waste precious time from my annual leave. Still have to [fit in with] school holidays for us though.”

Female, 41 years, Reading



Need for a frequent flyer levy

A frequent flyer levy is an acceptable solution to push travellers towards considering the number of flights they take

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A frequent flyer levy is a proposed policy solution to address the disparity between the small minority who take most of the flights, and the average person who flies once or less per year. Those who were taking fewer flights were naturally more supportive of a tax on those taking the most flights, particularly as the majority of people would not be required to pay this tax.

It might be expected that frequent flyers would be more resistant to the idea, but among our participants there was a recognition that a frequent flyer levy would prompt them to consider the journeys they take. It would help travellers to think about whether there is an alternative to jumping on a plane for shorter trips, and whether they could consider a holiday in Britain rather than an additional trip overseas. One frequent flyer noted that the only way she would consider changing her habits is if it “hit my back pocket”.

“People have been punished enough not being able to travel in the pandemic. No, I don’t see that this is the best time to do this”

Frequent flyer, male, 25 years, London



“I wouldn’t be very happy [about a frequent flyer levy], but it would influence how many flights I make, and I might make one less flight. I would still want to go away but I might think about other options in the UK or maybe the Eurostar”

Frequent flyer, female, 35 years, Leeds

