



**Getting to
and from
the airport.
Is coach
an option?**

transport**focus**





Foreword

Transport Focus is delighted to have worked with Heathrow Airport and the Department for Transport on this project. How people travel to and from an airport, and how they might do so in the future is a subject of interest to all three organisations, albeit with slightly different perspectives.

For Transport Focus the main aim of this project was to understand the decision-making process of travellers around these journeys and perceptions of travel among both existing coach users and non-users. For Heathrow, it was predominantly around how the airport operator might be able to boost the proportion of air passengers using public rather than private transport. The Department for Transport wanted more information, at a national level, to understand what factors could encourage people to switch to more sustainable modes of transport and to inform policy decisions about surface access to airports.

All three organisations are pleased with the outcome of the collaboration in achieving these aims. Through working together this project has delivered genuinely new information that can be used extensively now, and in the future, to shape policy and operational thinking.

Transport Focus is pleased to publish this report, along with more detailed analysis and a data simulator on its website, so that this information can be used more widely by a range of stakeholders including current and potential coach or bus operators, governments, airports, others in the aviation sector and more besides.



Produced in partnership with:



Summary

People can choose various modes of transport to reach an airport, particularly those living in urban areas. However, they are not always aware of all the options and there is a tendency to revert to a mode used in the past.

This research unpacks how people travel to airports, what drives their choices and how open they are to trying an alternative.

Awareness of coach as an option for getting to an airport is low and any effort to increase coach usage must dismantle negative perceptions of this mode. Encouragingly, this research highlights that people trying coach for the first time generally have a positive experience that is better than expected.

Persuading more people to go to an airport by public transport will require a joined-up strategy from airports and transport operators. Encouraging much greater use of coach will need a wider focus from governments and many others along with a significant change in public perceptions.



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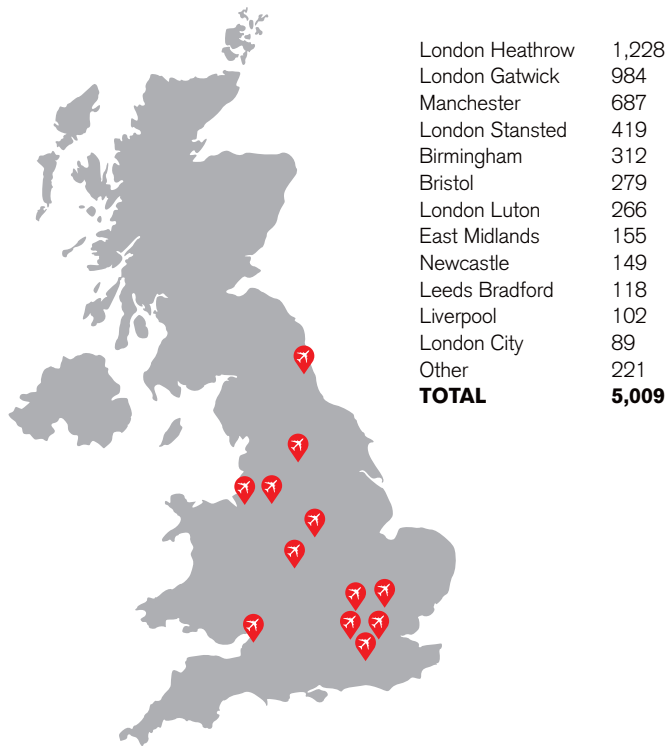
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1. What options are available to get to airport?

People do often realise that they have a choice of modes available to them when travelling to the airport.

While excitement is often high, the journey from home to a destination can be a long, difficult and stressful process, particularly if travelling with children. The simplest choice is that which worked the last time. People are more likely to consider alternatives if the trip is exceptional in some way – for example a honeymoon, in a large group or at a difficult time of day or night.

The nationally representative sample of 5009 people covered passengers using all airports in England as shown on the map.



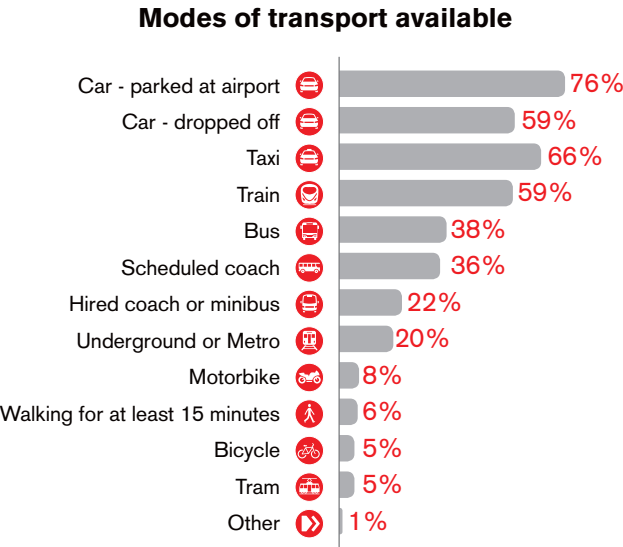
Taxi, because it was four in the morning and there are no buses. It's a crying shame [...] £80 on taxis; not good. [Coach] is cheap; it's £15 instead of £80. It'd be much better if we could have it both ways

Airport intercept

Me and my mates, when we last went to Tenerife, we just got a mini-bus. I mean it weren't even that far to the airport, half an hour or something, but it was just fun going round and picking people up who were dead excited

Group discussion

Approximately one third of passengers believe coach is an option for their airport journey



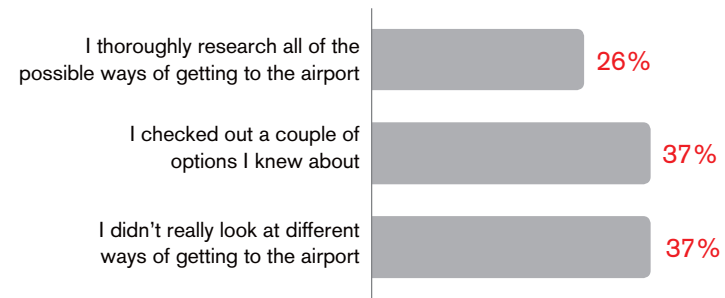
Which of the following modes did you believe were available when travelling to x airport?
Base: all respondents (5009)

In the online survey, almost three quarters said for their last journey to an airport they either did not look at different ways to get there or they checked options they already knew about.

26 per cent claim to have thoroughly researched all the options – with younger people more likely to have done this.

Alongside this, people were generally confident they knew all the options available for the journey to the airport when they booked their flight. It will be a challenge to get people to look into different options when they see no need to look for alternatives.

Comparing different options



Likelihood to thoroughly research all options available decreases with age



Those travelling by scheduled coach or bus were most likely to have researched all options



Passengers tended to search online for information

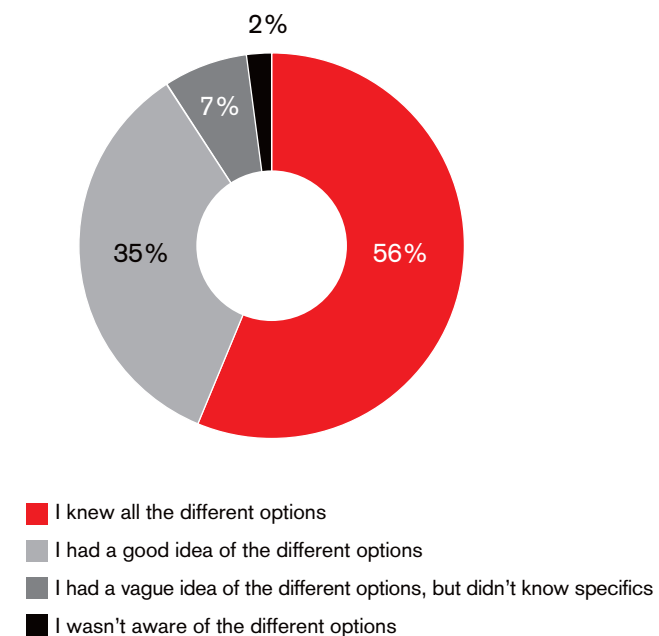


49% were solely responsible for choosing the mode of transport, 48% made a joint decision and 3% said they weren't the decision maker.

To what extent did you compare different ways of getting to the airport? Base: All respondent solely responsible for choosing how to get to the airport [2,431]

The proportion confident they know their transport options is considerably greater than the proportion who've actually researched them

Transport options aware of



Passengers almost certainly overstate what they know: 59% of those who didn't really look into it say they knew all the options.



Men were more likely to say they knew all the options than women (64% vs. 49%)



Proportion of people saying they knew all the options increases as age increases



Proportion of people saying they knew all the options increases with frequency of travelling by air

At the time of booking your flight, how aware were you of the transport options to get to [airport selected]? Base: All respondents (5,009)

2. Evaluating the options

The majority of people travelled by car to the airport the last time they flew. People travelling to London airports are more likely to have used public transport than those travelling to other airports.



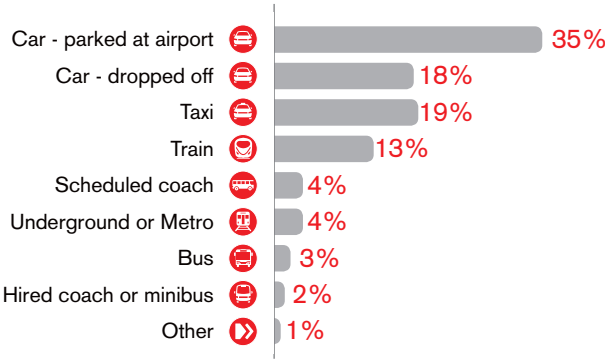
49% travelling to London airports travelled mainly by car compared to 60% travelling to non-London airports



Those with a lower household income were more likely to use public transport than those with a higher income

Car is the main mode of transport used by just over half, whilst for a quarter the main mode is public transport. Coach is an extremely niche product at present.

Main mode of transport to airport



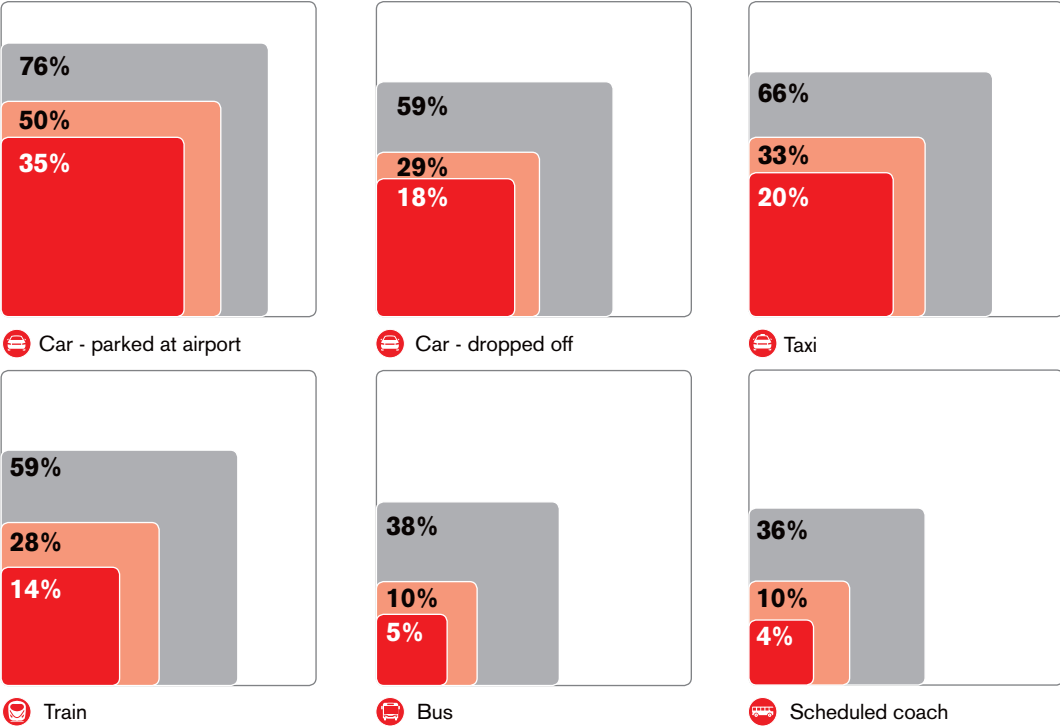
What was your main method of transport to get to the airport e.g. the mode you spent the most time on? Base: respondents (5,009)

How much awareness is there of each mode as an option for the journey? How many consider and then actually use each mode? Coach and bus have the lowest conversion rates -

that is the proportion of those who know about the mode and who go on to use it.

Key:

- Not available
- Available to use
- Considered this
- Used



When weighing up travel options to the airport, five key factors come into play:

Availability

Extent to which the mode is available (24 hour availability)

Reliability

Important for reducing stress / confidence will arrive on time

Comfort

How much they will enjoy the journey

Convenience

Time and effort required to make the journey

Value/ affordability

Is option viable for their budget?

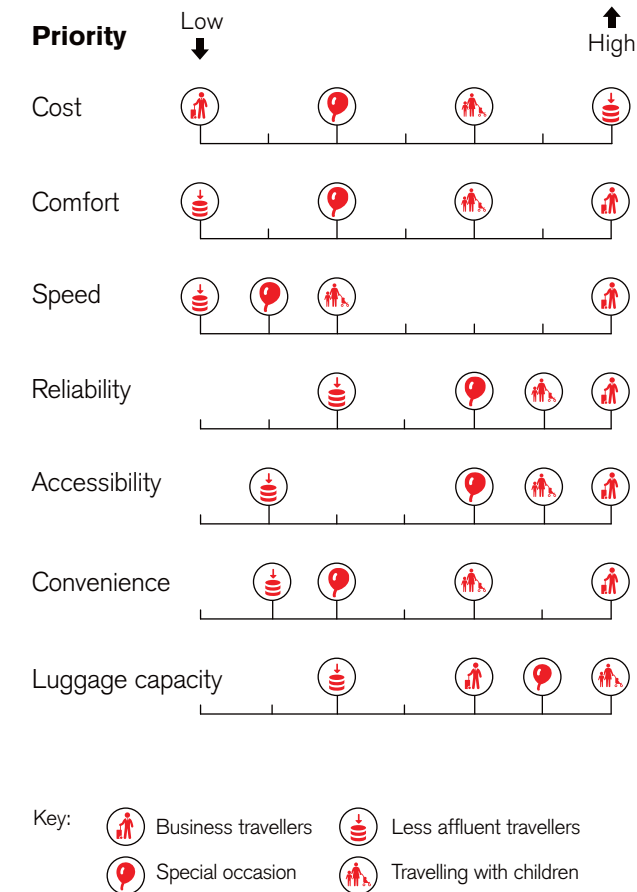


The same individual will inevitably make different decisions on how to travel to the airport, depending on their own situation, who they are travelling with and the reasons for the journey. People identify benefits and drawbacks for all the modes available to them, see table opposite.

Benefits		Drawbacks
<ul style="list-style-type: none">Self-reliant: many see the car as 'their bubble', a 'safe zone' in stressful timesOften seen as more cost-effective than public transport (especially if in a group)Practical for luggage/ childrenFlexible – can change route depending on trafficA lift with family/ friends delivers all the benefits at little/ no cost		<ul style="list-style-type: none">Can be stressful (e.g. traffic jams)Considered a 'chore'. Many also don't want to drive coming off a flightAirport parking often seen as expensiveThose relying on a lift do not always like to ask family/friends
<ul style="list-style-type: none">Speedy and efficient. Allows extra time at homeCan sit down and relaxCan be a social environment in a group		<ul style="list-style-type: none">Potential hassle – especially travelling with luggage or children and / or if route requires interchangeOften seen as too expensive, especially if making longer trips and/ or for group travelNot door-to-doorLondon interchanges can be challenging, especially those not used to the tube networkTicketing can be confusingAirports often not accessible from mainline stations; complicated routes and interchanges
<ul style="list-style-type: none">Affordable, efficient and reliableLondoners more familiarSimple ticketing	 (Heathrow and City to lesser extent)	<ul style="list-style-type: none">A London-centric preference: many from outside London aim to avoid the Tube and see it as confusing or stressfulDifficult with lots of luggageRush hour uncomfortableTicketing can be confusingA long journey, particularly in comparison to Heathrow Express
<ul style="list-style-type: none">Easiest option if airport within an affordable distanceCan be good for a groupReliable and often familiar (local taxi used before)Luggage capacityAvailable all hoursDoor-to-doorThose travelling (mostly from London) familiar with Uber app		<ul style="list-style-type: none">Unaffordable for someLonger distances (50 mile +) increase cost disadvantages and erode reliability advantageIn a large group, lacks the social aspect of a train or minibusConcerns about traffic/ delays can cause anxiety

When travelling in a group or for a special occasion then different factors may vary in importance when choosing a transport mode.

People travelling on business or a tight budget will make different choices.
Travelling with children also influences behaviour.



I've used the coach to go to Luton. I was travelling very early in the morning so there was no traffic and it leaves you right where you need to be.

Birmingham, Intercept, Business

It's the amount of stuff that stops us – the bits. The car is just so convenient. You can chuck everything in at the front door.

Stansted Intercept, Travelling with children

[Coach] is cheaper than the train to Colchester by about £20 so that's why [...] and it's faster [...] as a student price is more important.

Stansted Intercept, Less Affluent

We were going on a girls weekend away, and yes it was "I've booked this Easy Bus" and I went along with it.

London, Social Occasion

For passengers with disabilities (or travelling with someone who has a disability or condition) deciding how to get to an airport is even more complicated.



Some options may be unsuitable. For instance, a local rail station may not be fully accessible or they may need to break a longer journey.

These passengers often need to consider additional factors, including some or all of the items shown opposite:

Planning

- Levels of planning are heightened and must be 'fool-proof'
- Often arrive at airport with ample time to spare

Conserve Energy

- Some rest in days leading up to the flight
- Important to minimise physical and emotional exertion on lead up to the flight
- Any over-exertion can have a detrimental impact on health

Risk

- Disabled passengers must weigh up the risks for each mode of transport
- Consequences of anything going wrong can lead to passenger falling ill or missing their flight

Stress

- Barriers to travel are more prominent
- Anxiety associated with the amount and severity of barriers encountered is difficult to cope with

Discrimination

- Disabled travellers can suffer from discrimination when travelling to the airport
- This can be particularly problematic for those with hidden disabilities
- For example, being requested to move when sitting in a priority seat

Assistance

- Disabled travellers often need assistance, and for this to be linked from transport mode to the airport assistance services
- Passengers often need to access correct part of airport
- Many value continuous and flexible support

3. Most important factors in decision

As part of the online survey, a trade-off exercise determined the relative importance of different factors when deciding how to travel to and from airports.

The technique is known as Max-Diff, where respondents are shown different combinations of attributes and select the most and least important to them. This data is modelled to produce relative importance of all the factors. A total of 35 attributes were shown – and the model indexes these relative to each other.



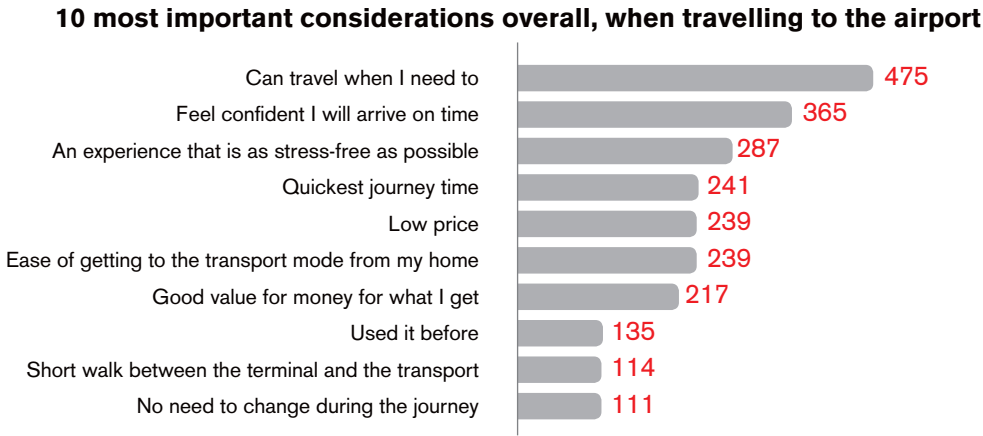
How to interpret Max-Diff

Any attribute with a score of more than 100 is above average importance. A score of 400 means this attribute is twice as important than an attribute scoring 200, and eight times as important compared to one which scores 50.

The simulator tool, on the Transport Focus website, permits data analysis to examine individual groups – such as users of a particular airport, people travelling with children, those with a disability, frequent flyers or different age groups.

At an overall level, the most important factor is **being able to travel when you need to** followed by **being confident you will arrive on time**.

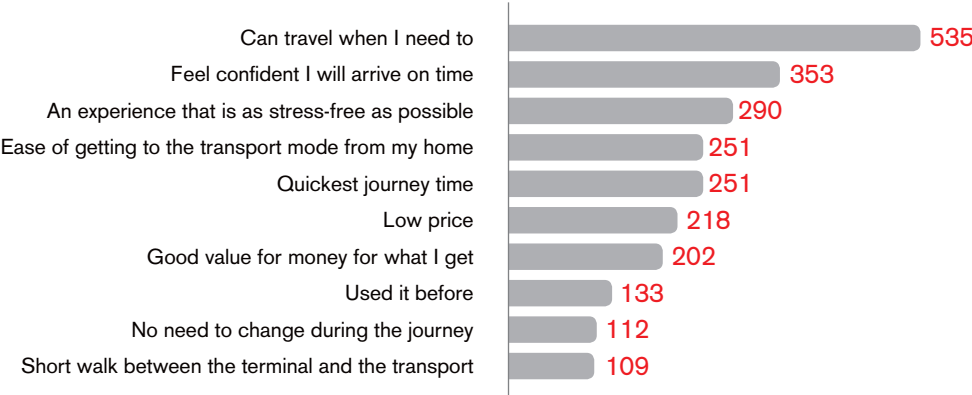
The chart below shows the top 10 attributes, all of which index at over 100. The three factors with lowest importance were space for wheelchairs and buggies (18.3), easy to use in a group (22.4) and WiFi availability (23.3).



For those who travel by car, the ability to travel when they need to is even more important.

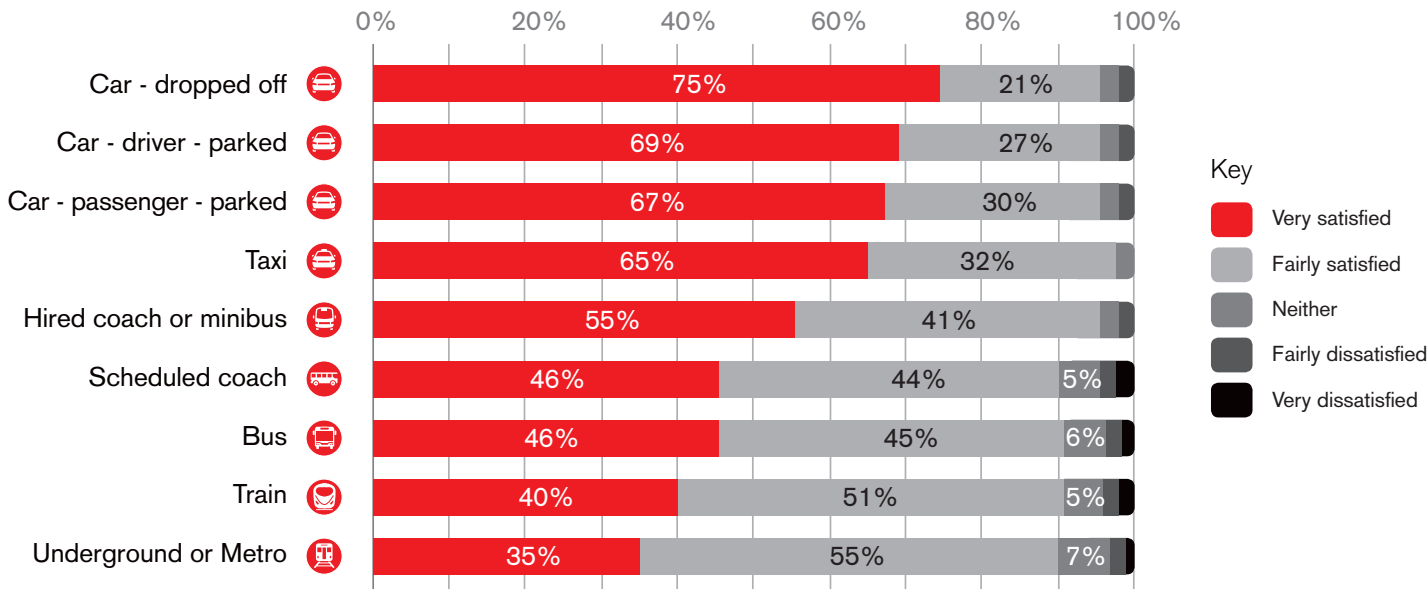
For people using public transport, the most important attribute is feeling confident about the arrival time. Low price and value for money are also relatively more important.

For coach users the most important attribute is low price, indexing at 403.



4. Satisfaction with modes used to get to the airport

The majority of people were satisfied when they last travelled to the airport, but there is some difference by modes. Two thirds or more were very satisfied with the modes involving a private car or taxi, whereas the public transport modes had higher levels of dissatisfaction and lower proportions of 'very satisfied' within the total satisfied group.



When looking at satisfaction with particular aspects there are some interesting differences across modes. The table below shows the total percentage of very and fairly satisfied for each aspect.

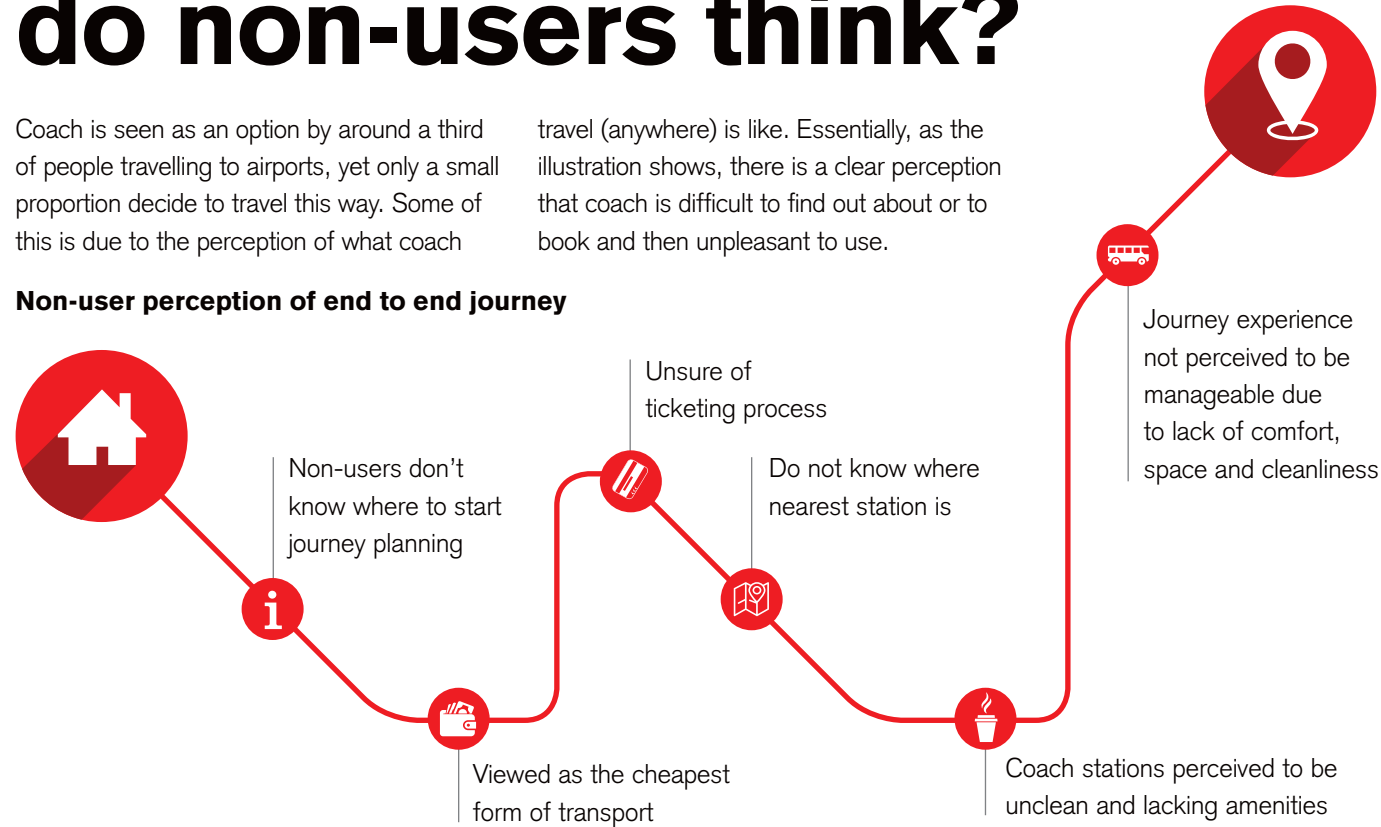
	Value %	Speed of journey %	Ease of getting to destination %	Punctuality %
Car - driver - parked	92	94	95	96
Car - dropped off	93	95	96	95
Taxi	83	94	96	94
Train	76	86	93	89
Bus	87	79	90	85
Scheduled coach	86	81	90	82
Underground or Metro	87	76	89	82

5. Coach travel - what do non-users think?

Coach is seen as an option by around a third of people travelling to airports, yet only a small proportion decide to travel this way. Some of this is due to the perception of what coach

travel (anywhere) is like. Essentially, as the illustration shows, there is a clear perception that coach is difficult to find out about or to book and then unpleasant to use.

Non-user perception of end to end journey



It doesn't come into my head. I don't know where I'd get the coach from. I just see these buses go past and I don't know where you'd get on.

London

I think it's just got a stigma on it for me. I don't know why. Maybe because they've plastered it pound sign, £1 to London, just seems too good to be true.

Newcastle

These perceptions of coach travel are frequently driven by isolated and long past experiences such as:

- One off journeys taken years ago
- School trips and private coach hire

Many non-coach users are unaware of the option to take the coach for regular journeys. When considering public or private modes of transport they rarely consider coach and often only weigh up car against train.












There is some understanding - typically vague - that a coach network exists but few have any clarity about how it works, many will assume it is only available to/from major cities, and awareness is poor about information, service times, frequencies, ticket purchase and costs.

People who live very close to coach stations are often unaware of their existence. Potential passengers are more likely however to consider coach travel when they realise how close they may be to a pick-up point.

There is a certain stigma towards coach use. Non-users tend to see the coach as 'not for them' but for...students, young or old and less affluent people.

6. The realities of coach use

When non-users of coach were tasked to make a coach journey, many perceptions changed.

-  Planning the journey was relatively straightforward, with many 'googling': coach, starting point, destination
-  Ticket prices were mostly seen as reasonable, although some had expected even cheaper fares
-  Ticketing viewed as very straightforward, with many saying that they did not have to show their tickets
-  Some got a lift with friends and family to the coach station
-  Station is seldom far from home
-  Very few experienced any problems
-  Some used stations and some used bus stops
-  Some waited at nearby cafes
-  Stations clean and amenities available
-  Some felt looked after and happy with supervision and attention from the driver
-  Passengers are far happier when coach is less full

Buying tickets was quick and easy, good choice of times and found outward and return journeys which suited me. Much cheaper than the train.

Non-coach user

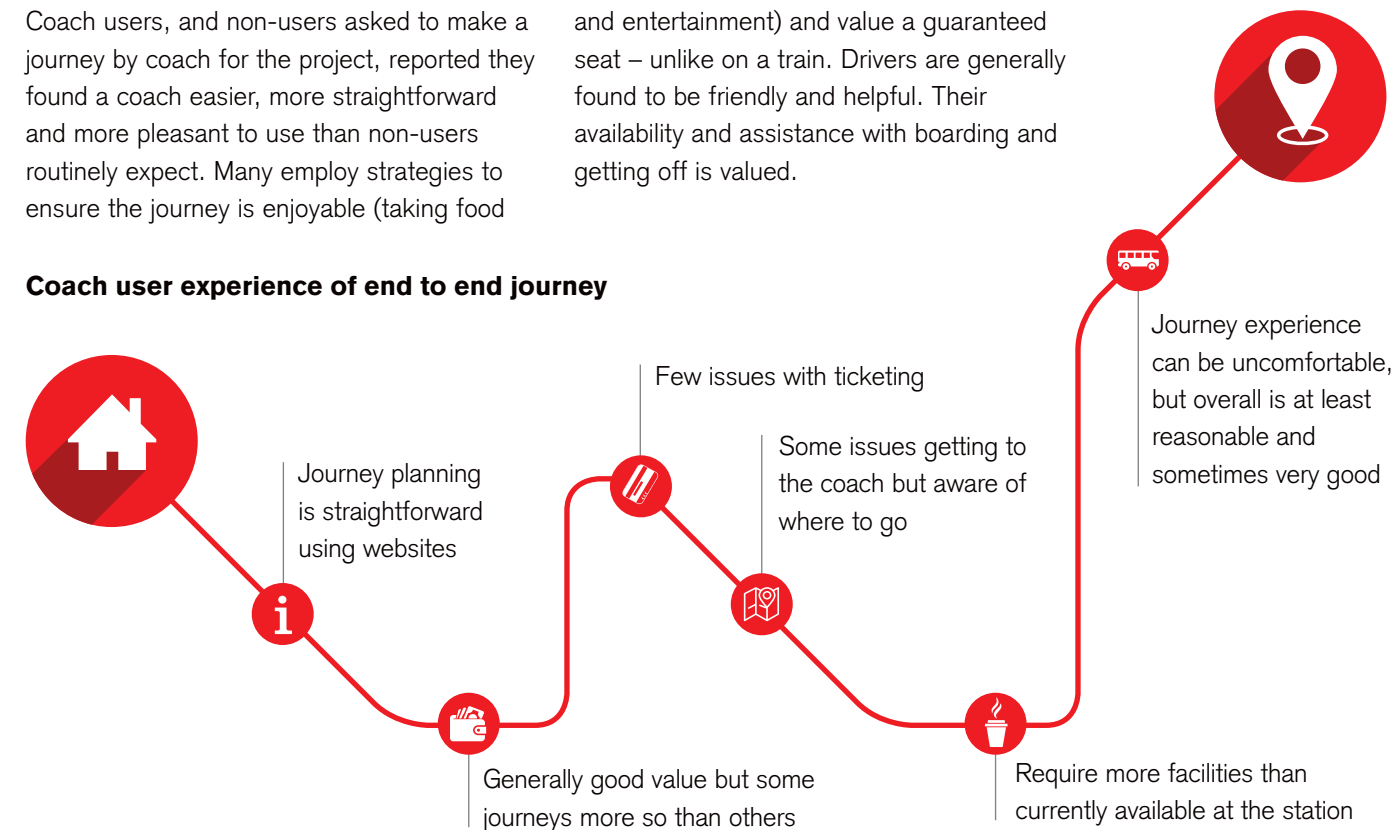
Before we set off from Sheffield the coach driver seemed happier he was humming... the coach driver greeted everyone and explained where the toilets were... He then said could ask him anything and to come and see him.

Non-coach user

Coach users, and non-users asked to make a journey by coach for the project, reported they found a coach easier, more straightforward and more pleasant to use than non-users routinely expect. Many employ strategies to ensure the journey is enjoyable (taking food

and entertainment) and value a guaranteed seat – unlike on a train. Drivers are generally found to be friendly and helpful. Their availability and assistance with boarding and getting off is valued.

Coach user experience of end to end journey



Travelling by coach is generally felt to be a low-cost, good value option that is cheaper than rail or taxi.

Both users and non-users often comment on the fares – whether they have personally experienced them or just seen them advertised. For some passengers the coach can be seen as a valuable service and a pleasant experience.

It's the cheapest – I'm young; train would be easier but it's 100 quid, and I wish I had 100 quid but...

Birmingham Intercept

Well my husband has booked to go to London on Friday, back Saturday, and it's cost him £12 in total, but it was quicker than the train and £40 cheaper.

Norwich, Holiday

The experience of coach travel is largely positive for those disabled passengers able to use it

Disabled passengers enjoy travelling by coach for much the same reasons as non-disabled passengers

- Scope of network provides for both large urban centres and more rural areas
- Regular services
- Low cost nature of offer, particularly given more likely to be on a low income

Often smaller and local nature of departure points remove the need to expend badly needed energy to find correct coach

- Familiar with layout
- Easier to locate required coach
- Less space to traverse in comparison to railway stations

For those that are regular users, the stigma surrounding coach travel is broken down.

I keep telling everyone how great the coach is but people tut tut me. For me it has taken away a great deal of the fear I had around travelling.

Disabled Passenger

Coaches provide a sense of personal and private space with a sense of being in own bubble

- Guaranteed seat with own table
- No unsafe overcrowding
- No need to justify requirement for seat to others (hidden disabilities)
- Fewer issues with anti-social behaviour

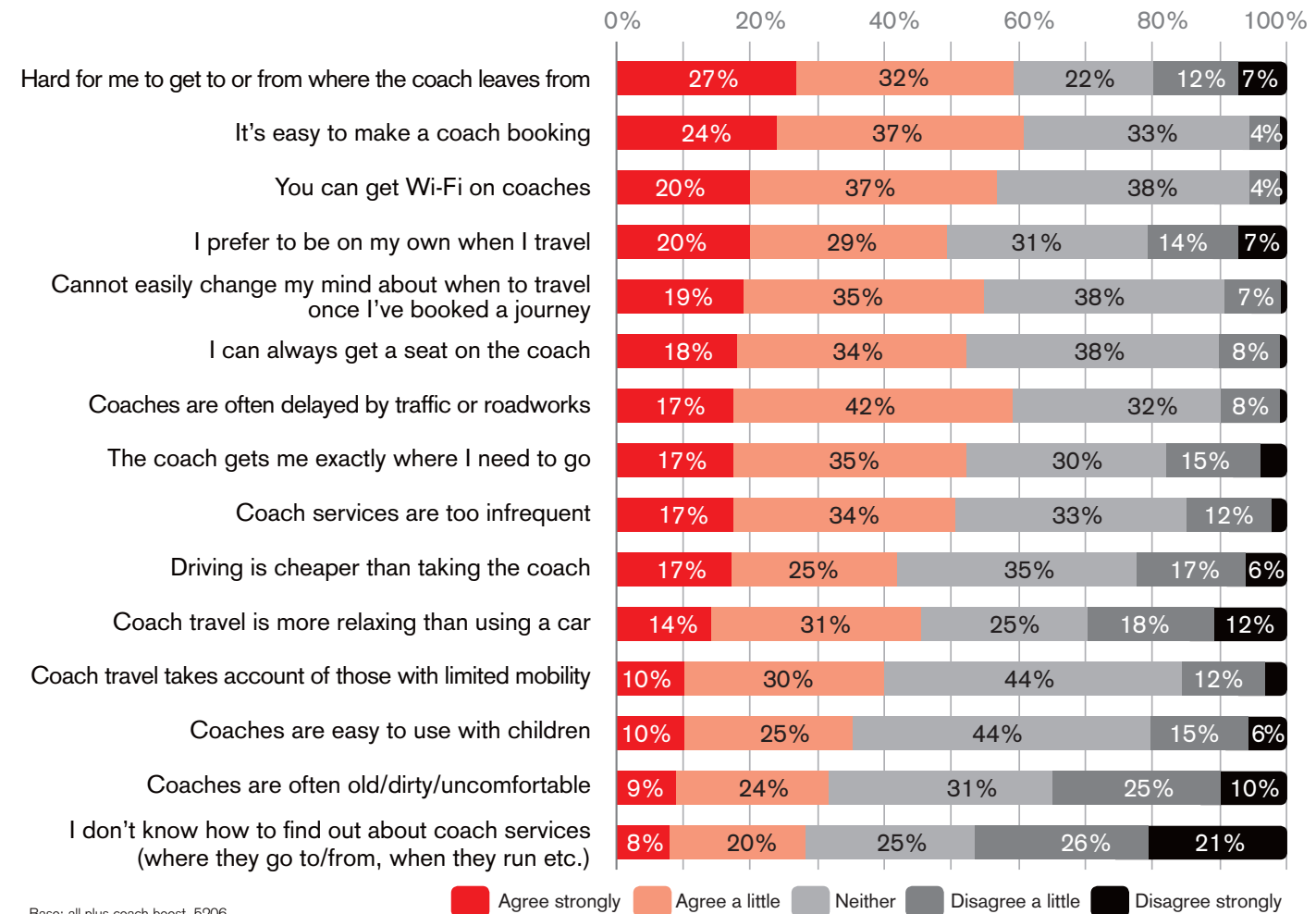
You can get on a coach and sit down, get yourself comfy and just tune out. You have your own light and aircon and it is like being in a bubble, especially at night.

Disabled Passenger

For some non-users, a low advertised fare makes them doubt the quality of the service – with a feeling that it was bound to be an unpleasant and unreliable journey.

In the online survey, we asked how much people agreed with statements about coach use.

A high proportion were unable to agree or disagree – demonstrating poor knowledge of what coach travel is like.





7. Using the coach for airport journeys

The key benefits of travelling by coach to the airport are cost and convenience.

Assumed benefits



The cheapest way to get to the airport for those travelling long distances



Ample luggage storage available and no need to keep an eye on it during the journey (unlike with rail)

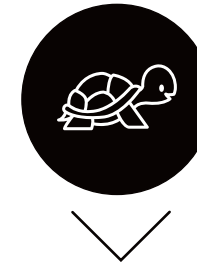


A 'door-to-door' coach service is more appealing (and sometimes quicker) than other forms of public transport

Assumed drawbacks



Seen as neither comfortable nor sociable, which puts off many that consider their holiday to start 'when they leave the front door'

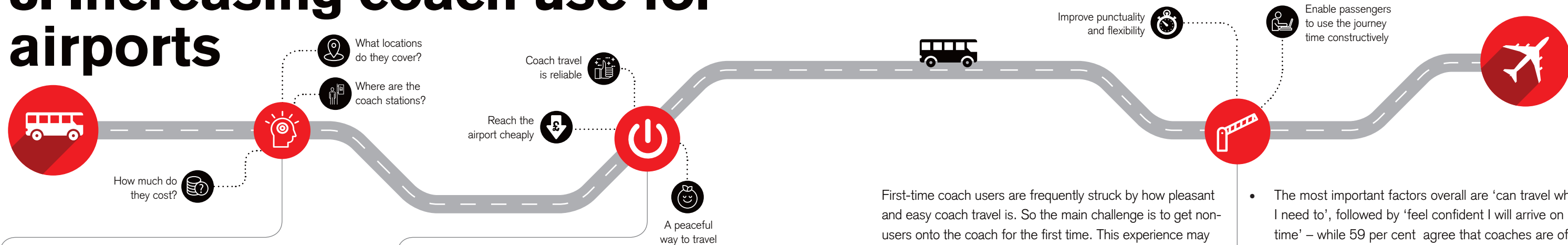


Cannot reach the airport quickly or spontaneously



Not perceived to be a 'turn up and go' service offer from a coach station. Familiarity with timetables is low, and timings are perceived as irregular

8. Increasing coach use for airports



Awareness building

Passengers are often unaware of where coach stations are, what coaches are like, what locations they cover, and how much they cost. They accept that coaches may be a valuable offer but feel unequipped to take advantage of it.

Different types of passengers have different needs, many of which can be addressed well by coach travel – but awareness of coach travel as a viable option is low.

Building on the ‘savvy customer’ – already targeted well by budget airlines and supermarkets – could be effective. A little imagination about coach could save a lot to spend on holiday.

Give it a go!

Coach is a niche product at present; people who travel by coach are younger than average and have a lower income than most passengers; they have different priorities to non-coach users.

Convincing passengers to ‘take a chance’ on coach travel will be challenging. However, all modes of transport to the airport have disadvantages, many of which the coach is seen to address.

Passengers may benefit from hearing they can reach their destination cheaply, reliably and peacefully by coach.

First-time coach users are frequently struck by how pleasant and easy coach travel is. So the main challenge is to get non-users onto the coach for the first time. This experience may well be enough to entice passengers back for further trips.

There is a great deal of myth-busting to be done around coach travel. Even if they are aware of coach offerings, passengers have imagined horror stories about cramped conditions, drunk passengers and uncomfortable long-haul travel.

Removing barriers to use

Creative approaches are needed – to service design, the way information is offered and the reassurance provided.

There is currently a poor match between the strengths of coach and key priorities of non-coach users:

- The most important factors overall are ‘can travel when I need to’, followed by ‘feel confident I will arrive on time’ – while 59 per cent agree that coaches are often delayed by traffic or roadworks and 51 per cent think coach services are too infrequent. This partly explains the low conversion rate (proportion of those aware of coach who actually use it).
- People travelling by coach are less satisfied with punctuality and flexibility than users of other modes – they tolerate this because low price is the most important factor to them.
- Ability to use journey time constructively may provide an opportunity. It is not a key selection factor, but it is the one major dissatisfaction factor amongst car users.

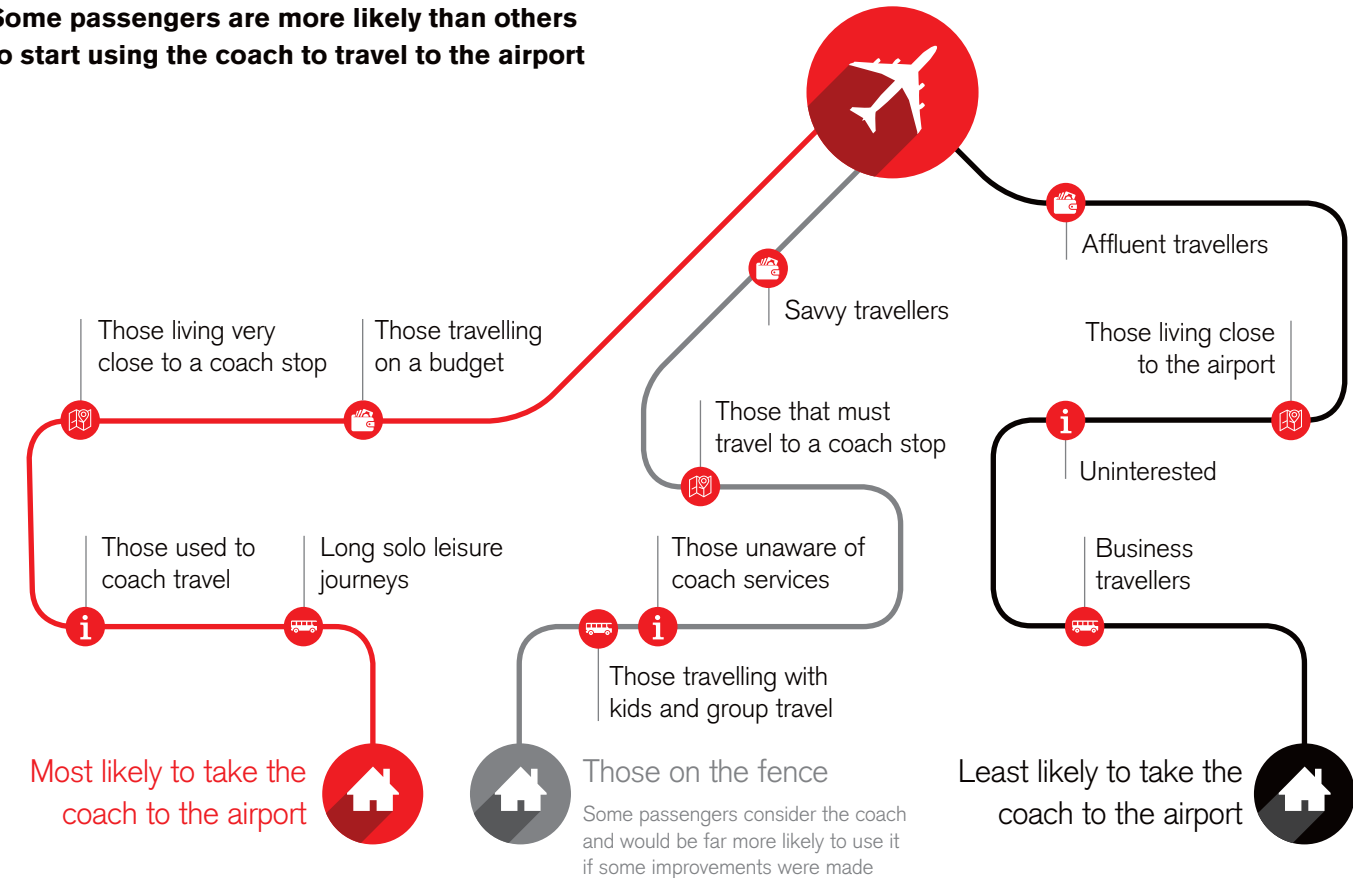
9. Improvement and innovation

Regular coach users do not report confusion or problems with the coach system and most are satisfied currently.

However, improving facilities, schedules, real-time information, punctuality reports and vehicles will all boost passenger satisfaction and could alert non-users as a point of difference from other modes.

Those most likely to convert to coach use should be immediate targets:

Some passengers are more likely than others to start using the coach to travel to the airport



10. Background

Transport Focus has turned its attention to how people choose to travel to and from airports for a number of reasons. These journeys are often stressful, typically involve a significant amount of pre-planning and usually offer a range of modal choices – so provide a useful case study for infrequent journeys. They are a journey type where coach is an option – so this work offers scope to better understand the experience of coach users, who form an important part of our remit (there are over 25 million journeys on scheduled coach operations each year in the UK).

The Government and airports themselves want to increase the use of public transport to and from airports rather than by car (or taxi) so there is appetite for greater understanding around coach usage. Airports are also major interchanges for coach passengers when making journeys within the UK.

Heathrow Airport, Transport Focus and the Department for Transport commissioned a programme of research to examine two issues:

- What drives choice of airport and how decisions about surface access to airports (include use of coach) are made
- Around coach use more generally: where coach fits into the consideration set for longer journeys and what are passengers' experiences and perceptions of coach travel.

11. Survey Method

A two stage approach was used

Qualitative research undertaken by Illuminas

- 16 Focus groups around access to airports and 6 around coach use (spread throughout England)
- Depth interviews with vulnerable passengers
- Intercepts at airports and coach stations
- Ethnographic diary exercise
- Non-users making coach journey – reporting back through app and in follow-up interviews
- Fieldwork in March and April 2018.

Quantitative research undertaken by Breaking Blue

- 5,000 online interviews (included 200 coach passengers)
- Boost survey of 250 coach users
- Respondents recruited by email from a web panel for 15 minute survey
- Fieldwork from 26th June to 20th July 2018
- Representative sample of airport passengers who have flown in the last 12 months
- Quotas by age, gender, region and income to ensure representativeness
- Targets for proportion flying from each airport to match CAA passenger statistics.

Contact Transport Focus

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Transport Focus is the operating name of the Passengers' Council

Transport Focus is the independent consumer organisation representing the interests of:

- Bus, coach and tram users across England outside London.
- Rail passengers in Great Britain
- All users of England's motorways and major 'A' roads (the Strategic Road Network)

We work to make a difference for all transport users



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Making every journey better



