



BREAKING BLUE

**Bringing clarity,
delivering breakthroughs**

**Transport Focus
Surface Access to Airports - Research Report
August 2018**

Introduction and methodology

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Booking transport to the airport

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Background & objectives

- The Department for Transport is keen to understand more about the **reasons for choosing modes of surface access** and propensity to switch
- Heathrow Airport have ambitious targets to **increase the proportion of passengers using public transport**
- Transport Focus want to understand **modal choice to/from airports** and the elements of planning which go into the journey
- The sponsors want to **understand the reasons for use (or non-use) of coaches** and the **journey experience** when travelling by coach
- This research builds up qualitative research already conducted amongst coach passengers to provide a robust quantitative data, with a **large enough sample to allow analysis by airport and different demographic groups**

The main research objectives are to:

- Understand surface access to airports, in terms of choice of transport mode
- Explore the key requirements of passengers travelling to/from airports and the influence these have on modal choice
- Measure satisfaction with a recent journey to the airport
- Understand attitudes to and experience of coaches as a mode of travel to/from airports

Methodology



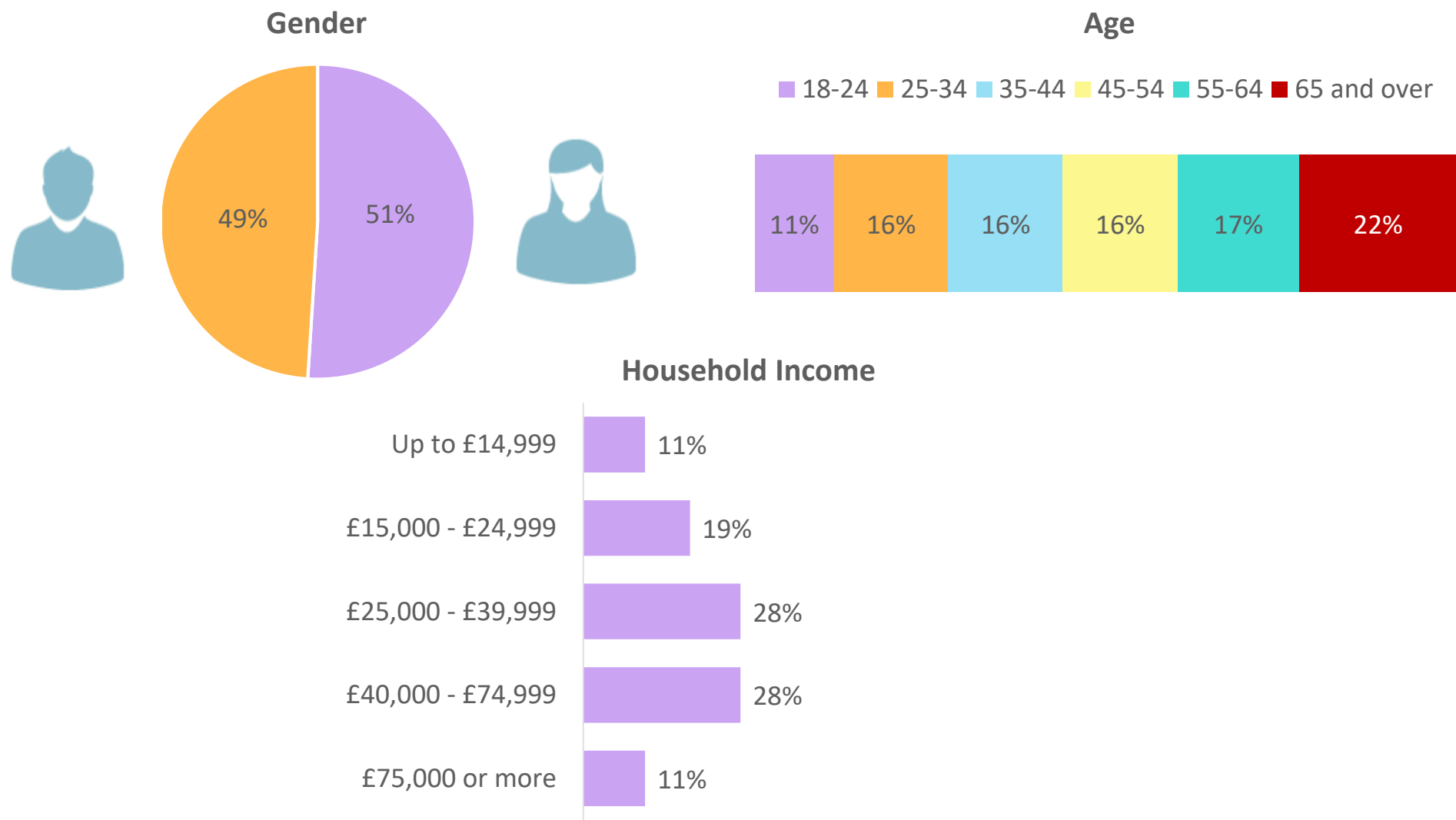
Core
5,000 online interviews
(included 200 coach
passengers)



Boost
250 additional online
interviews with coach
passengers

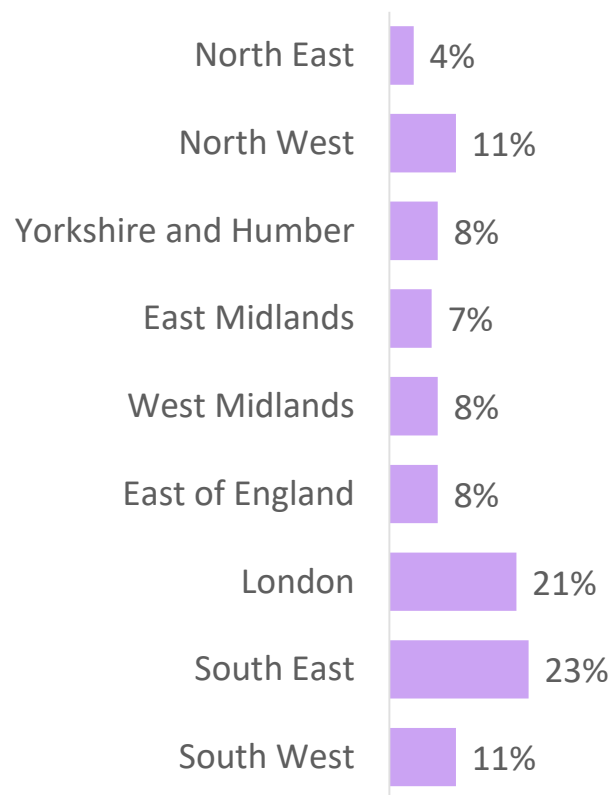
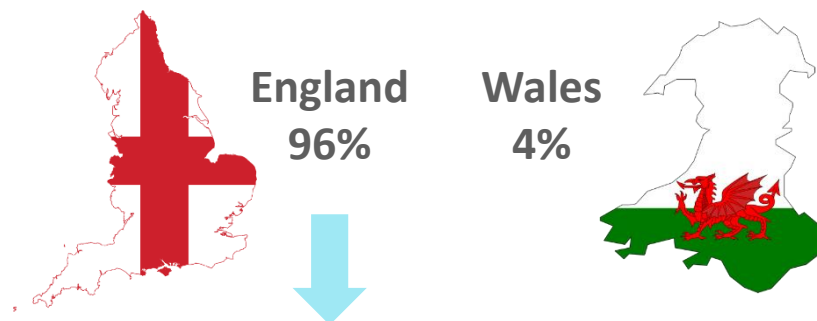
- Respondents recruited by email from a web panel maintained by Survey Sampling International (SSI)
- 15 minute survey
- Fieldwork from 26th June to 20th July 2018
- Representative sample of airport passengers who have flown in the last 12 months
- Quotas by age, gender, region and income to ensure representativeness
- Targets for proportion flying from each airport to match CAA passenger statistics

Respondent demographics – who we spoke to



S3. Are you... / S4. How old are you? / S5. How much is your total annual household income before taxes? Base: All respondents (5,009)

Respondent demographics – where?



Airport flown from	No of interviews
London Gatwick	984
London Heathrow	1,228
London City	89
London Luton	266
London Stansted	419
Birmingham	312
East Midlands	155
Manchester	687
Liverpool	102
Leeds Bradford	118
Newcastle	149
Bristol	279
Other England & Wales	221
TOTAL	5,009

S1. Which country do you live in? (5,009) / S2a. In which region of England do you live? Base: All respondents (4,799)

A6. From which UK airport did you depart? Base: All respondents (5,009)

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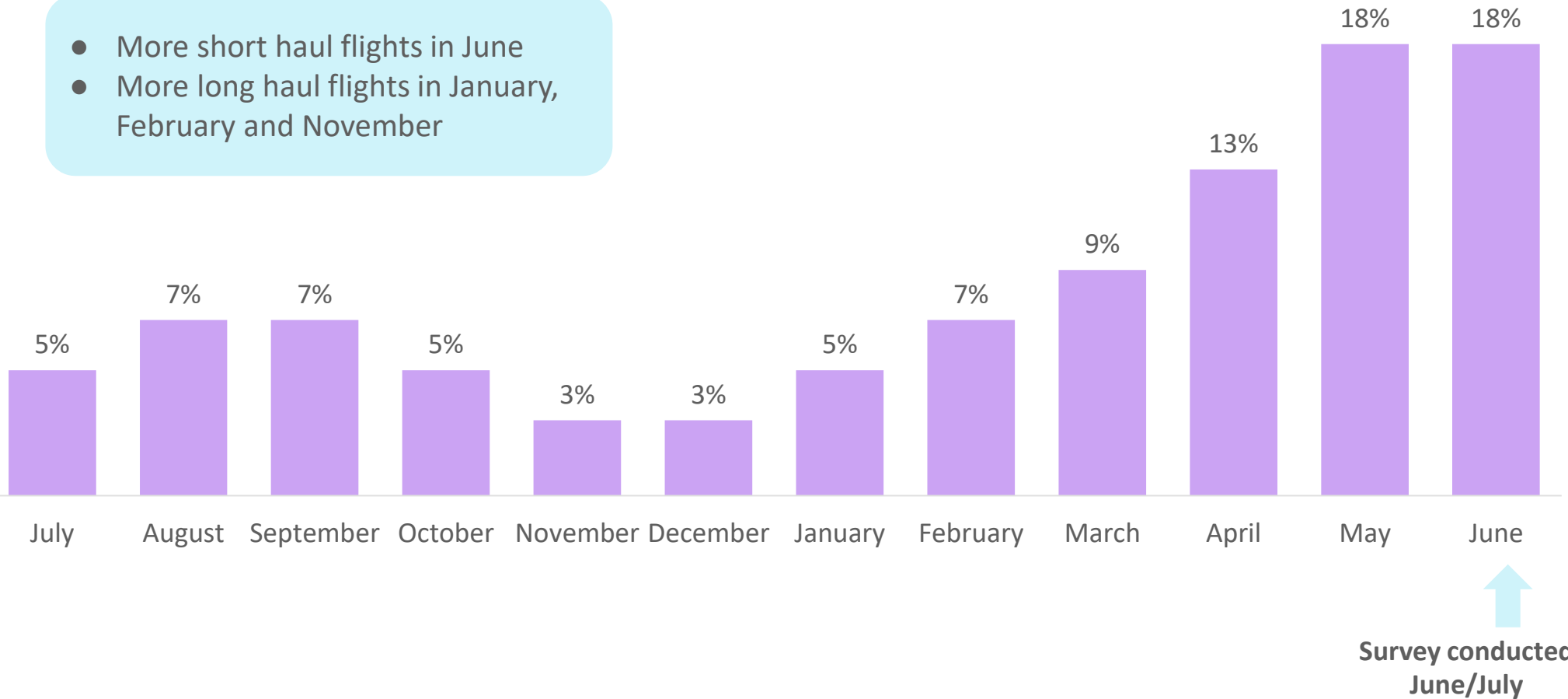
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Around half of travellers took their most recent flight in the last 3 months

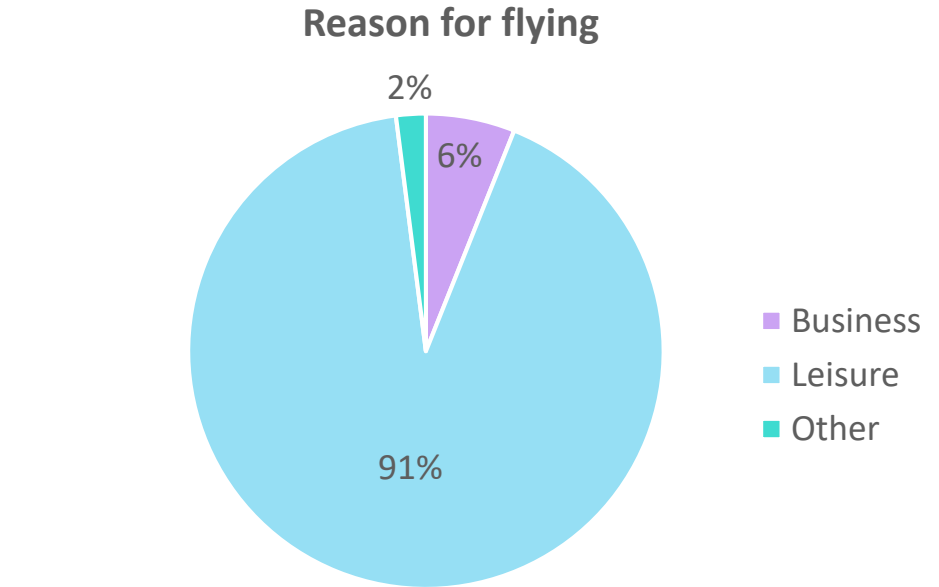
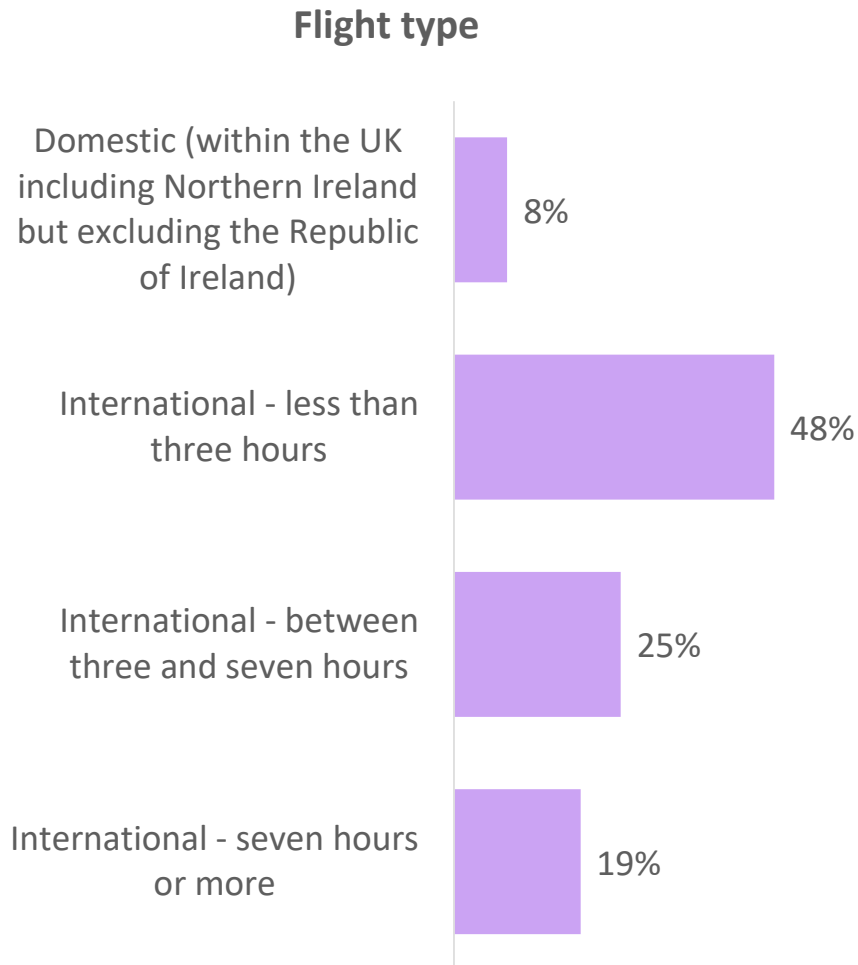
Month flown

- More short haul flights in June
- More long haul flights in January, February and November



A1. When did you take this flight? Base: All respondents (5,009)

The majority of flights were international, short-to-medium haul flights and were for leisure purposes (i.e. holiday, visiting friends or family)



Business travellers more likely to be making multiple trips, taking domestic flights and a higher proportion travelling from London airports

Passengers are more likely to take long haul flights from Heathrow or Gatwick and shorter flights from Luton or Stansted

Flight type

	Birmingham	East Midlands	Leeds Bradford	Liverpool	London City	London Gatwick	London Heathrow	London Luton	London Stansted	Manchester	Newcastle	Bristol	Other	NET: London	NET: Non-London
Domestic	8%	8%	10%	15%	28%	5%	5%	8%	8%	4%	9%	11%	23%	6%	9%
International - less than three hours	48%	57%	59%	60%	47%	48%	32%	70%	68%	44%	42%	61%	57%	46%	51%
International - between three and seven hours	27%	34%	30%	25%	17%	28%	21%	21%	23%	31%	38%	25%	18%	23%	28%
International - seven hours or more	17%	1%	1%	0%	8%	20%	42%	0%	2%	21%	11%	3%	2%	24%	11%

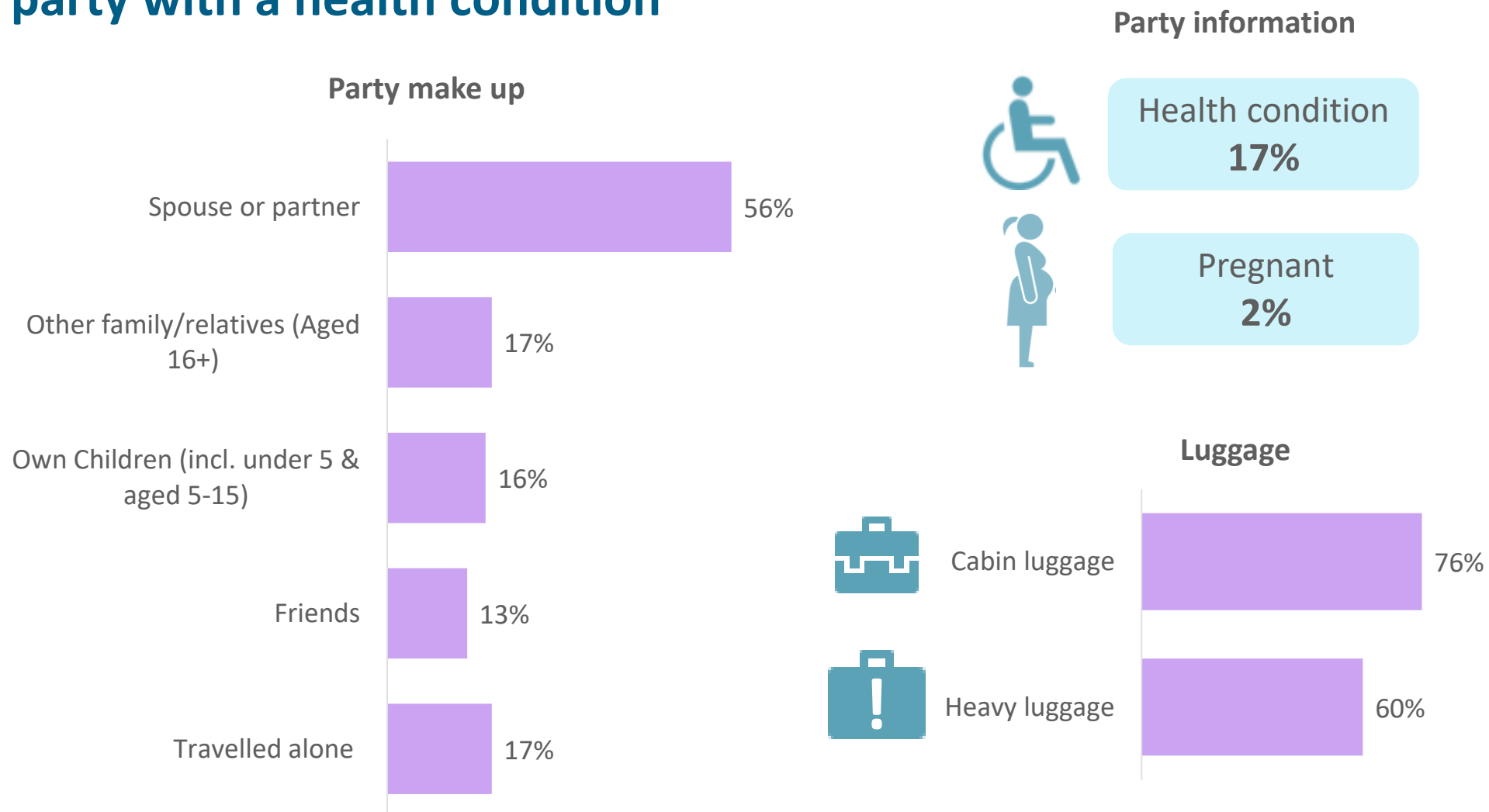
Over a quarter of those flying from London City were flying for business reasons

Reason for flying

	Birmingham	East Midlands	Leeds Bradford	Liverpool	London City	London Gatwick	London Heathrow	London Luton	London Stansted	Manchester	Newcastle	Bristol	Other	NET: London	NET: Non-London
Business	6%	1%	3%	12%	26%	4%	11%	6%	5%	4%	3%	3%	6%	8%	4%
Pleasure	92%	98%	94%	86%	70%	94%	87%	90%	93%	95%	93%	95%	90%	90%	94%
Other	2%	1%	3%	2%	4%	2%	2%	5%	2%	1%	4%	2%	4%	3%	2%

A3. What was the main purpose of your most recent flight? Base: All respondents (5,009)

Most made their most recent trip with other people; taking cabin baggage or heavy luggage. Around one in five had someone in their party with a health condition



A4. Were you accompanied on this flight by? / A5. Did you, or anyone travelling with you, have any of the following at the time of the flight? / B4. Were you travelling with any of the following? Base: All respondents (5,009)

The majority of passengers travel from home and almost everyone arrived when they expected to

Travelling to the airport from

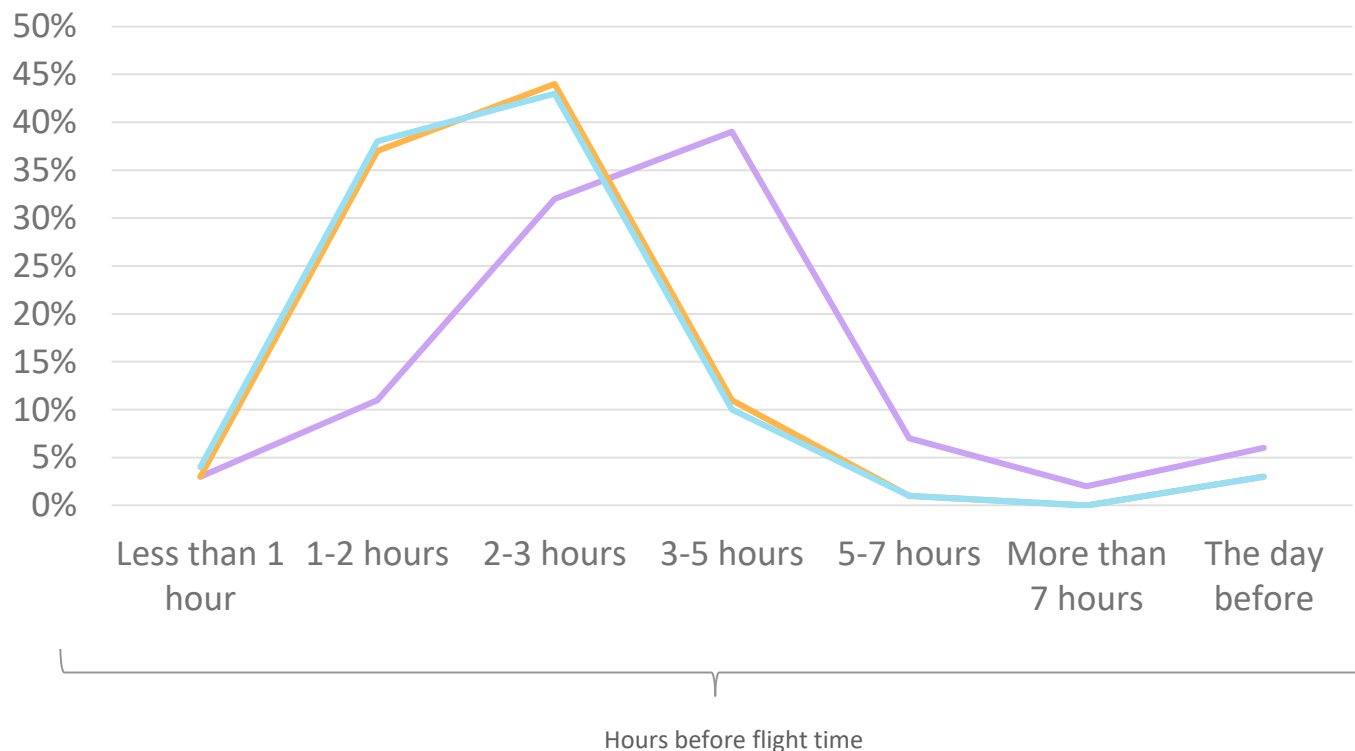


89%
travelled
from home



Length of time before departure

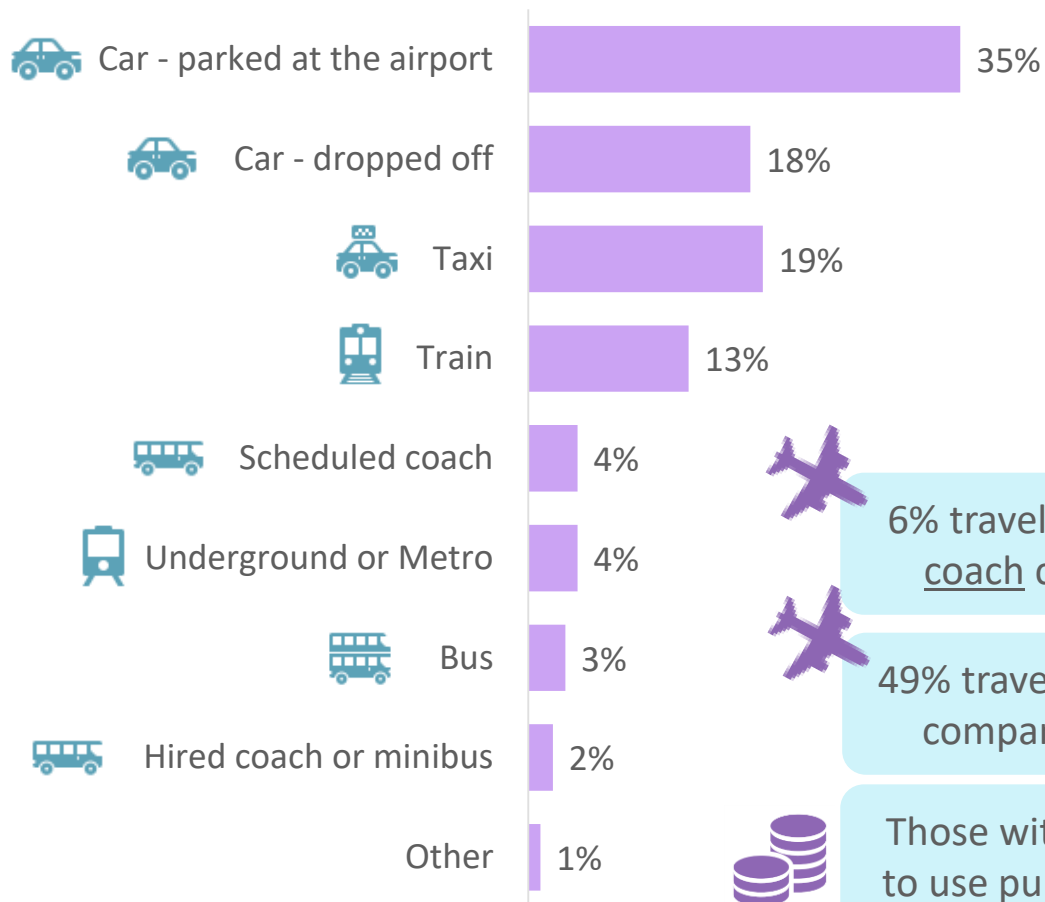
— When left — When planned to arrive — When did arrive



B1. Where did you leave from? / B3a. How long before your flight departure did you leave <insert location from B1>? / B3b. How long before your flight departure did you plan to arrive at the airport? / B3c. How long before your flight departure did you actually arrive at the airport? Base: All respondents (5,009)

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



Travel to London Heathrow

- 28% park at the airport
- 14% are dropped off
- 21% travel by taxi
- 13% travel by tube
- 12% travel by train
- 6% travel by coach

6% travelling from a London airport mainly travelled by coach compared to just 1% to non-London 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

B2c. What was your main mode of transport used to get to the airport e.g. the mode you spent the most time on? Base: All respondents (5,009)

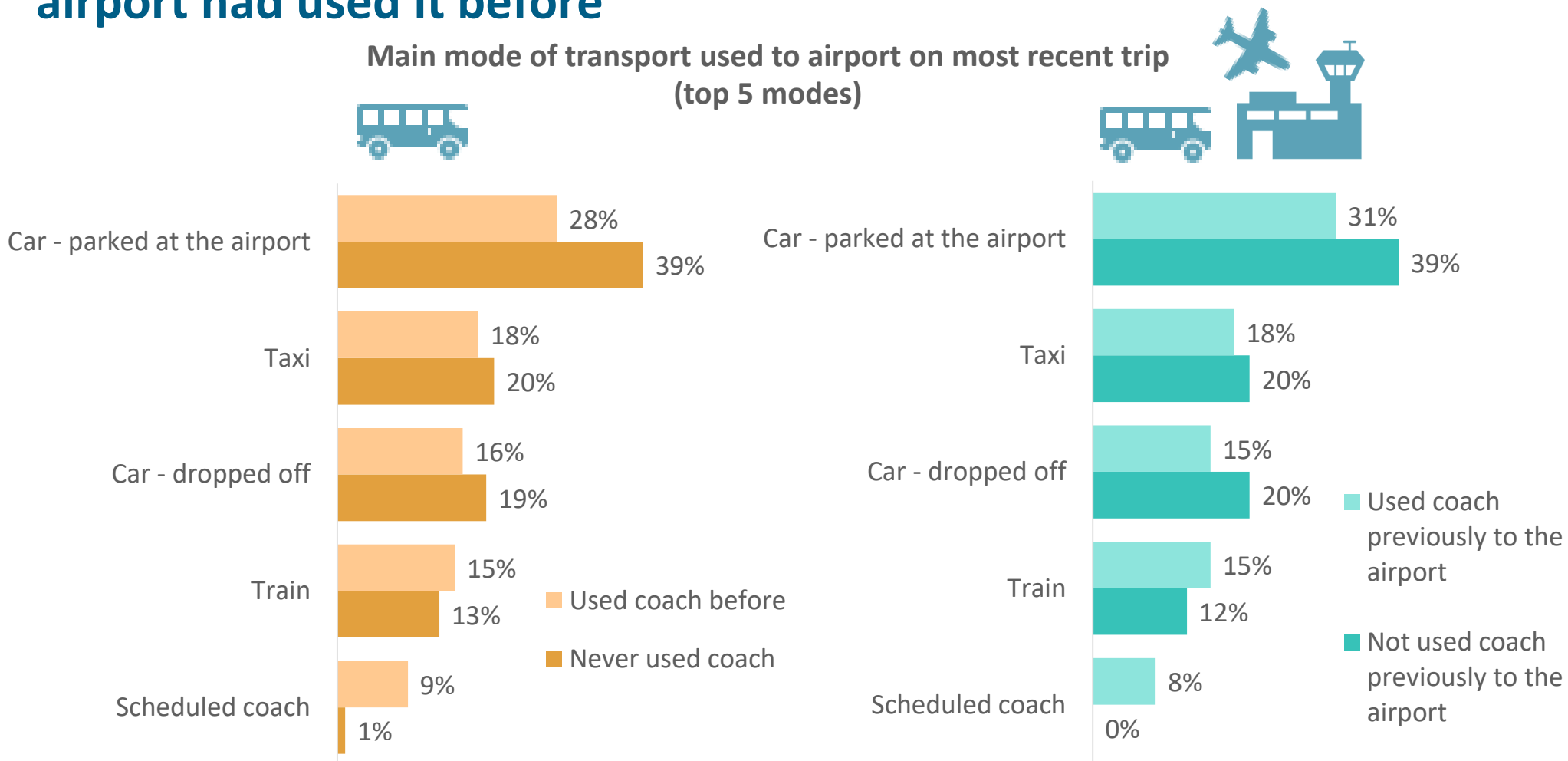
Those travelling to London Stansted are more likely to travel to the airport by scheduled coach than any other airport

Main mode of transport to airport (top 5 modes)

	Birmingham	East Midlands	Leeds Bradford	Liverpool	London City	London Gatwick	London Heathrow	London Luton	London Stansted	Manchester	Newcastle	Bristol	Other	NET: London	NET: Non-London
Car – parked at the airport	37%	37%	46%	37%	21%	32%	28%	42%	44%	34%	31%	55%	40%	33%	39%
Car – dropped off	22%	26%	17%	23%	9%	16%	14%	16%	16%	18%	27%	20%	25%	15%	21%
Taxi	23%	23%	20%	17%	18%	17%	21%	17%	10%	27%	23%	9%	16%	18%	21%
Train	11%	3%	3%	10%	19%	26%	12%	13%	12%	12%	5%	4%	11%	17%	9%
Scheduled coach	2%	1%	0%	1%	3%	3%	6%	6%	11%	1%	0%	4%	0%	6%	1%

B2c. What was your main mode of transport used to get to the airport e.g. the mode you spent the most time on? Base: All respondents (5,009)

Those who previously travelled to the airport by coach used car, taxi or train on their most recent journey to the airport. Almost everyone who used coach on their most recent journey to the airport had used it before



B2c. What was your main mode of transport used to get to the airport e.g. the mode you spent the most time on? Base: All respondents (5,009)

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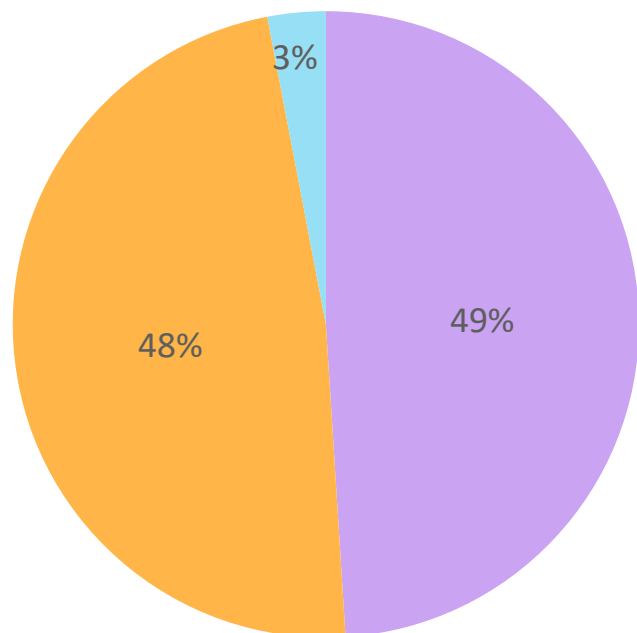
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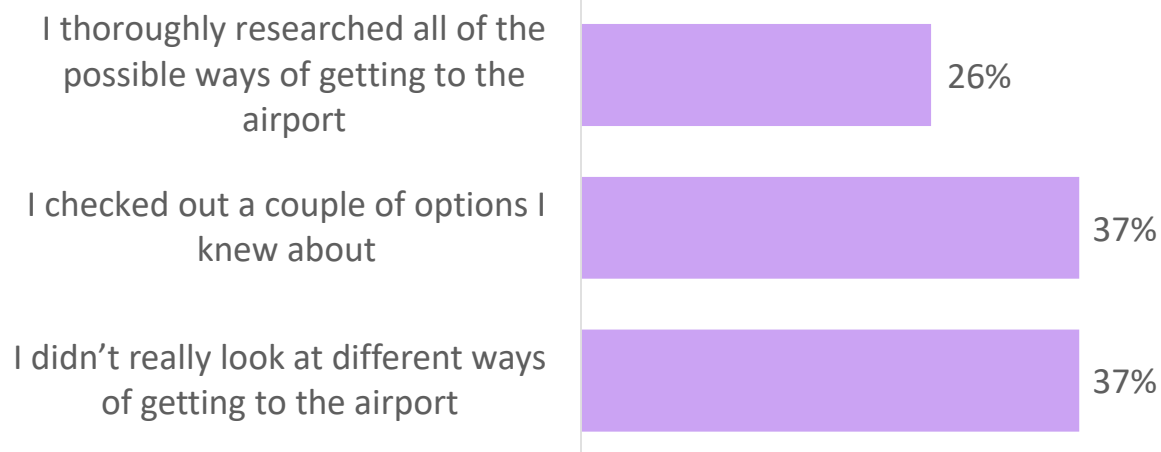
Only a quarter of passengers research all the options

Decision maker – mode of transport to airport



- Yes solely me
- Yes me and someone else together
- No

Comparing different transport options



Likelihood to thoroughly research all options available decreases with age

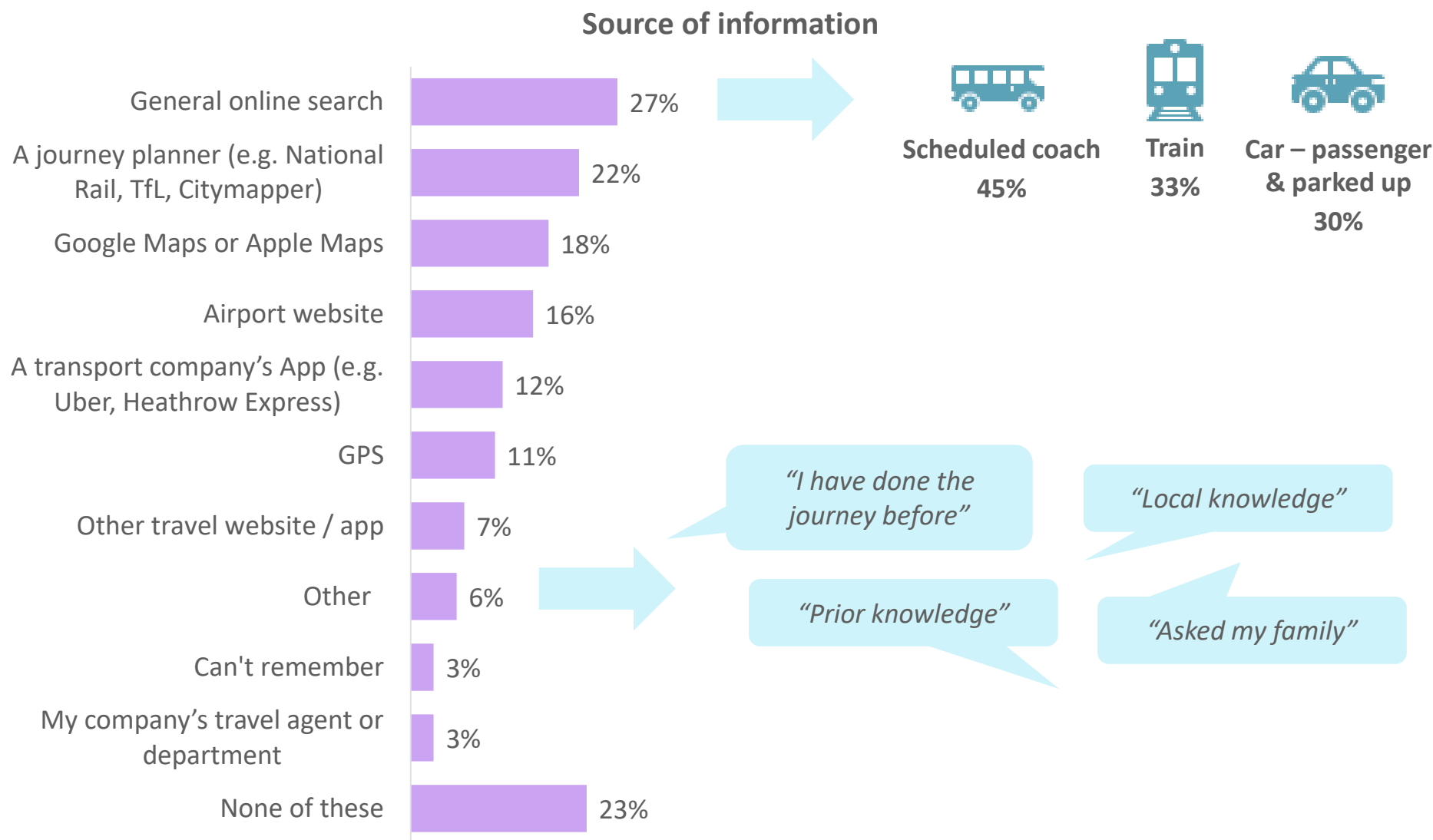


Those travelling by scheduled coach or bus were most likely to have researched all options

C1. Did you choose how to get to the airport? Base: All respondents (5,009)

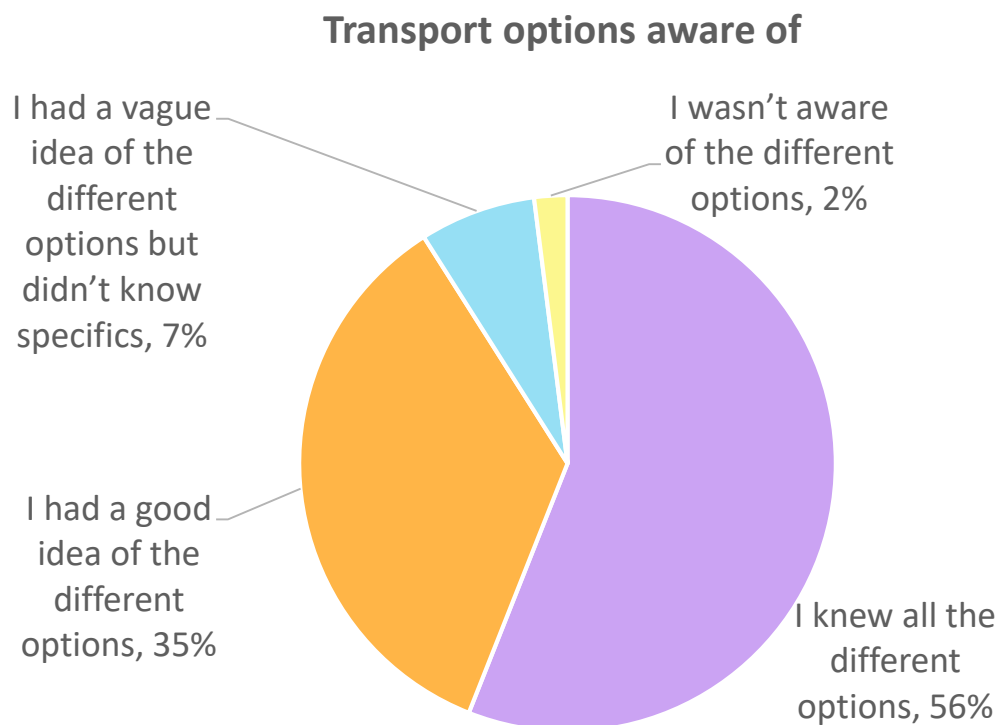
C3. To what extent did you compare different ways of getting to the airport? Base: All respondents solely responsible for choosing how to get to the airport (2,431)

Passengers tend to search online for information, using a journey planners or look at map apps



C4. Which of these did you use to find out information on how to travel to the airport? Base: All respondents 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



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%)



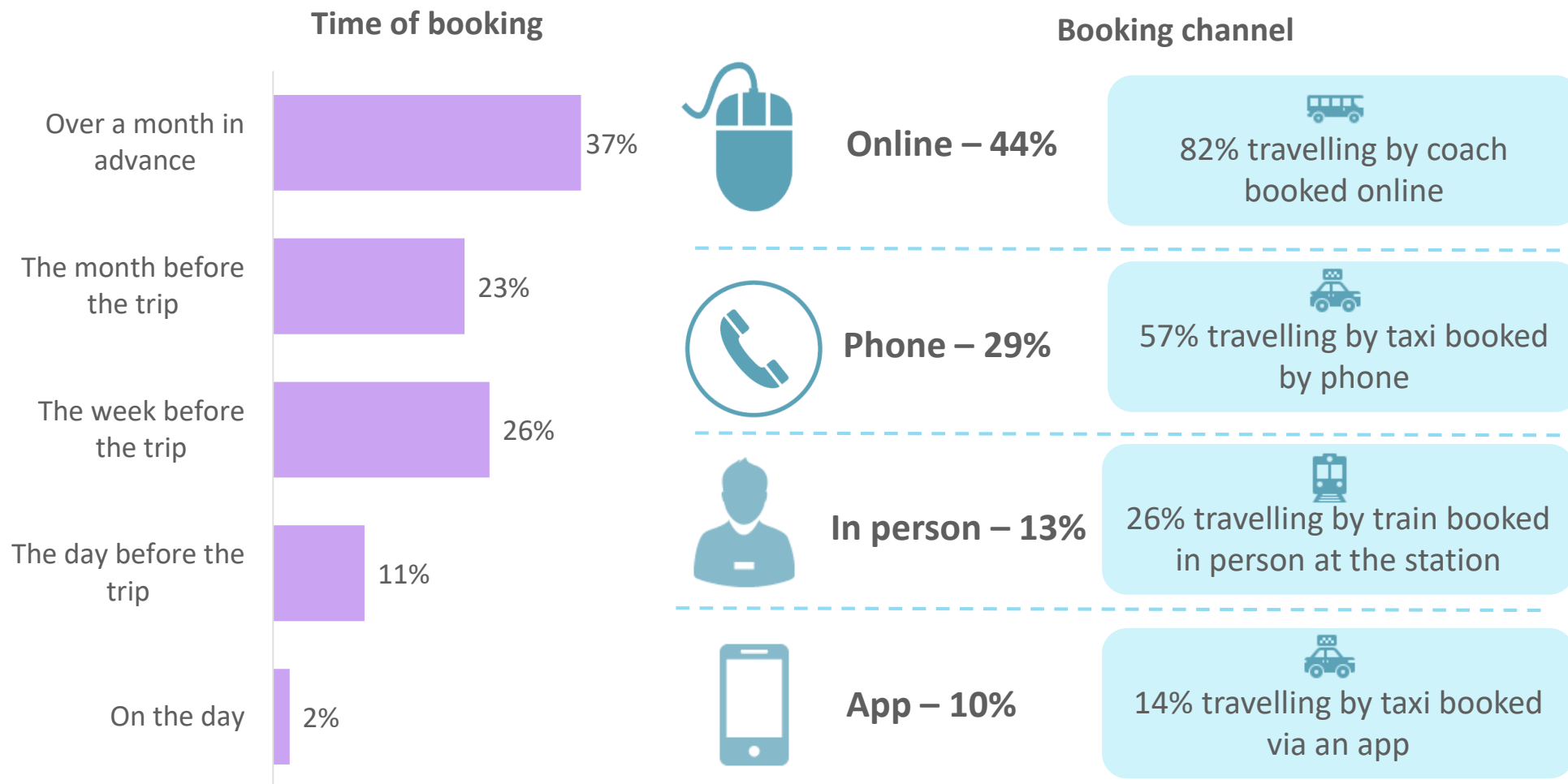
Age

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



Number of people saying they knew all the options increases as number of trips increases

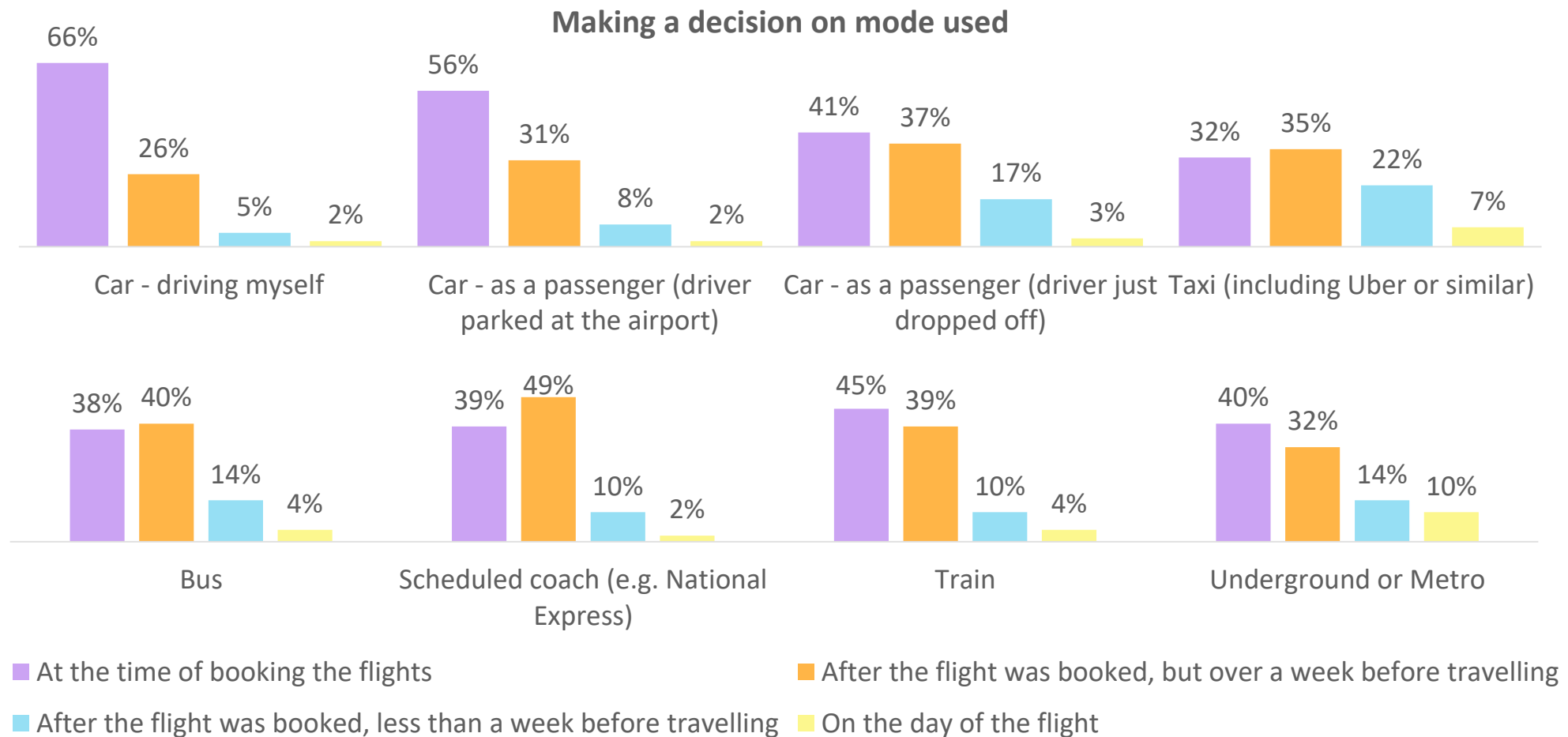
The booking is made later than the modal decision, but a large proportion of passengers are committed well before the week of the flight



C7. How far in advance was the booking made? Base: All respondents making a booking in advance (1,573)

C8. How was this trip booked? Base: All respondents responsible for making the booking in advance (1,576)

Almost all passengers decide on the mode of travel at least a week before the flight. Coach passengers are most likely to make their decision after the flight is booked but over a week before travel



NB. Only showing answers with a base size over 50

C2. When was the decision made to use <main mode of transport> to get to the airport? Base: All respondents solely responsible for choosing how to get to the airport (2,431)

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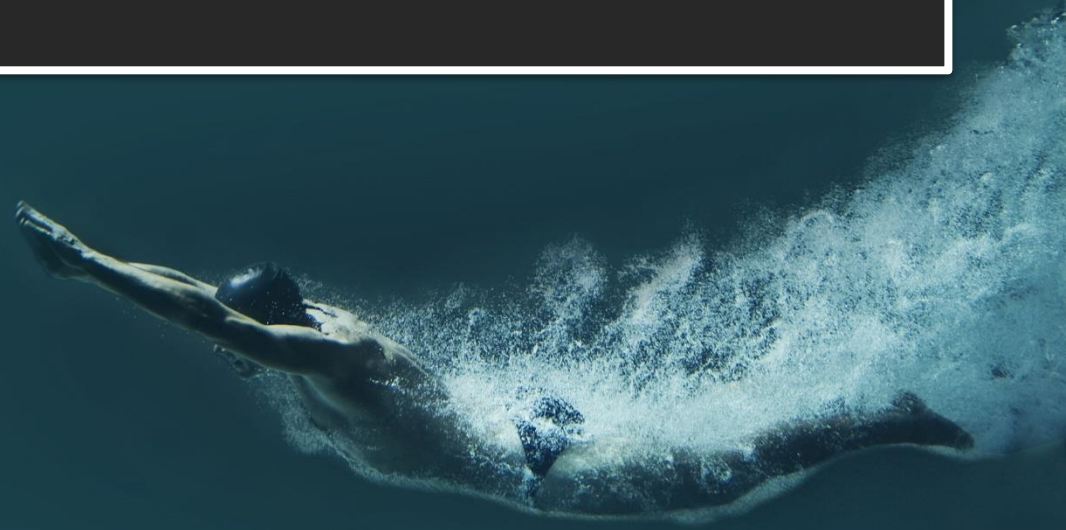
Importance ratings

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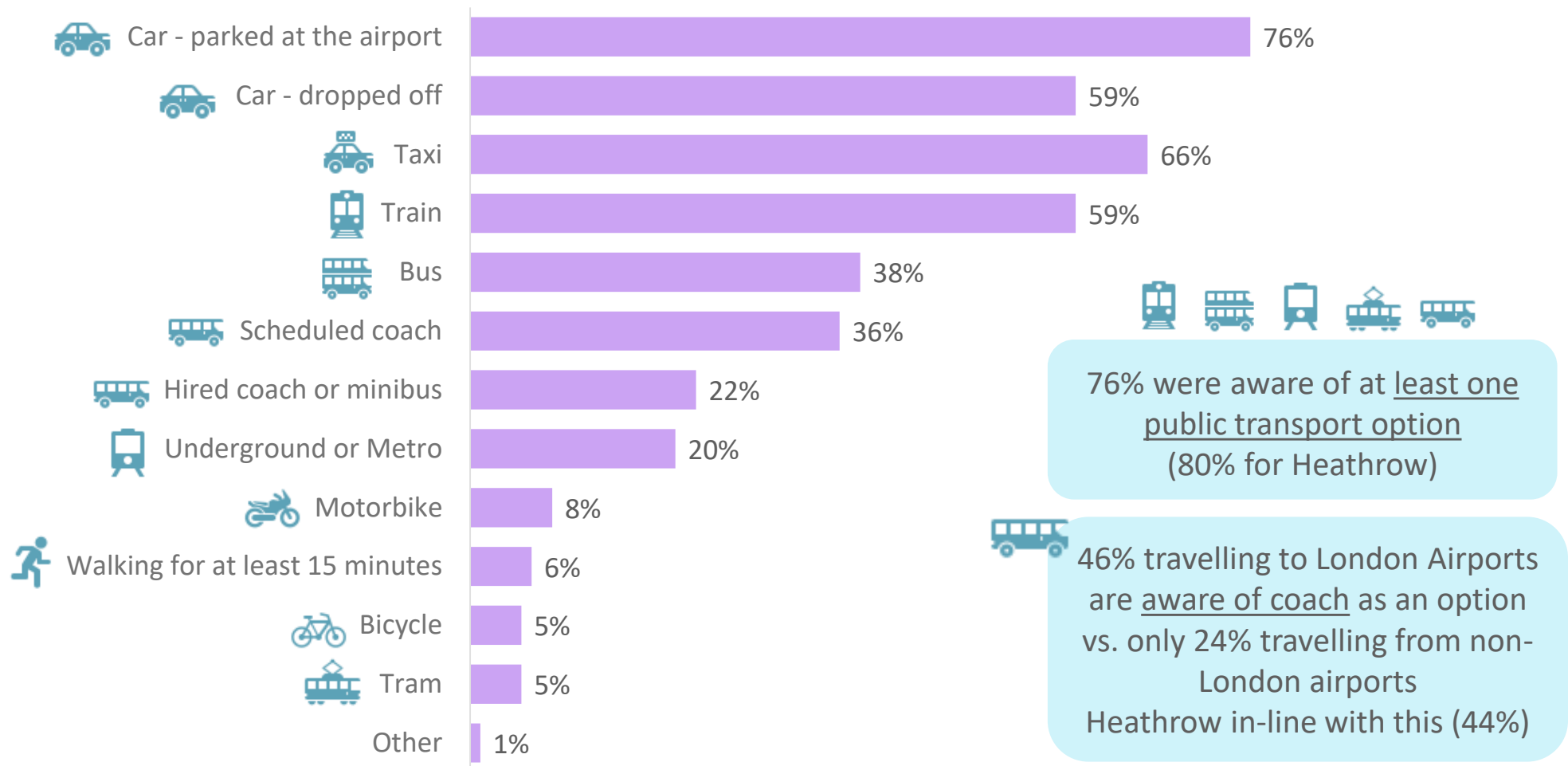
Coach travel

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

Modes of transport available



A10. Which of the following transport options did you believe were available to you when travelling to [AIRPORT SELECTED]?

Base: All respondents (5,009)

Those travelling to Leeds Bradford or Newcastle airport were least likely to be aware of coach as an option for travelling to the airport

Modes of transport available (top 6)

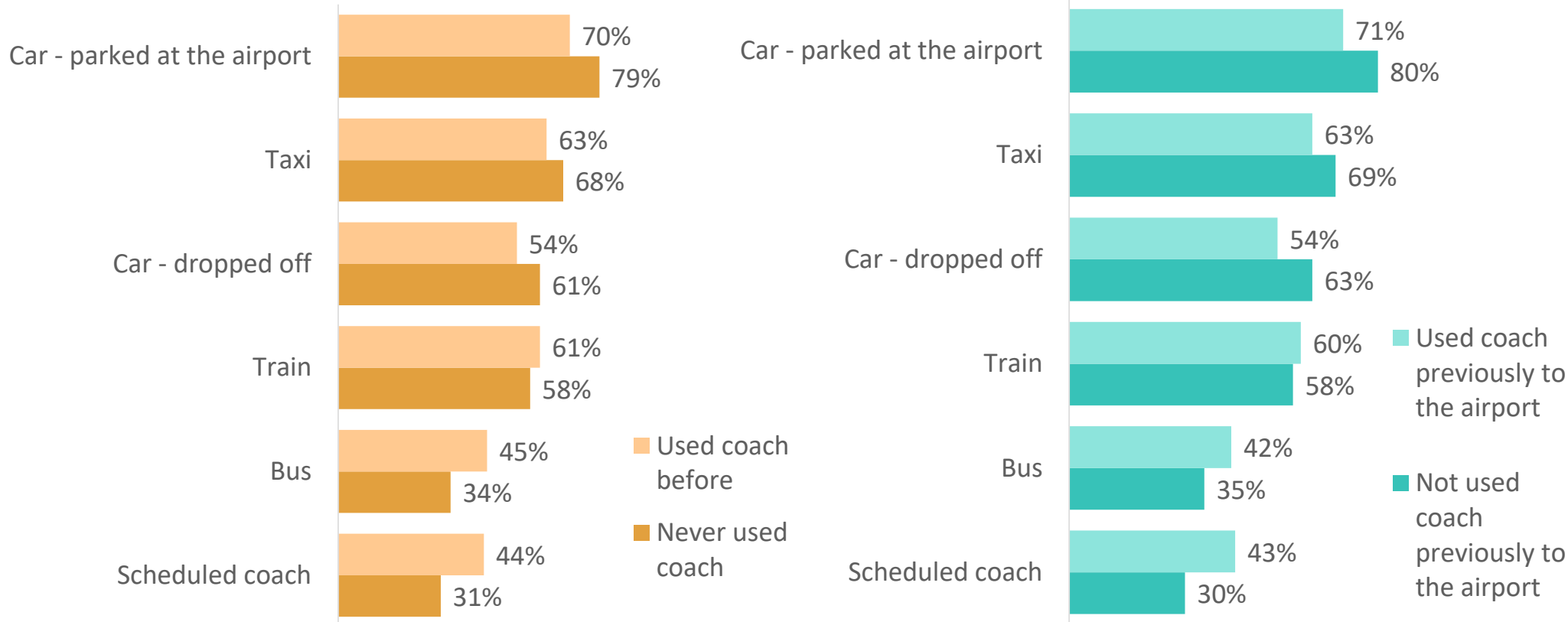
	Birmingham	East Midlands	Leeds Bradford	Liverpool	London City	London Gatwick	London Heathrow	London Luton	London Stansted	Manchester	Newcastle	Bristol	Other	NET London	NET Non-London
Car – parked at the airport	74%	81%	81%	74%	56%	75%	71%	76%	76%	79%	81%	87%	77%	73%	79%
Car – dropped off	59%	66%	56%	59%	42%	60%	55%	60%	57%	65%	64%	57%	59%	58%	63%
Taxi	68%	68%	58%	65%	53%	67%	68%	64%	60%	74%	78%	53%	59%	67%	69%
Train	59%	30%	16%	41%	46%	76%	62%	57%	67%	67%	28%	34%	36%	67%	49%
Bus	37%	45%	52%	36%	35%	29%	42%	42%	33%	38%	34%	52%	40%	37%	42%
Scheduled coach	29%	29%	6%	21%	13%	46%	43%	43%	54%	25%	11%	33%	12%	46%	24%

A10. Which of the following transport options did you believe were available to you when travelling to [AIRPORT SELECTED]?

Base: All respondents (5,009)

Less than half who had used coach to previously travel to the airport believed coach travel was an option for their most recent trip

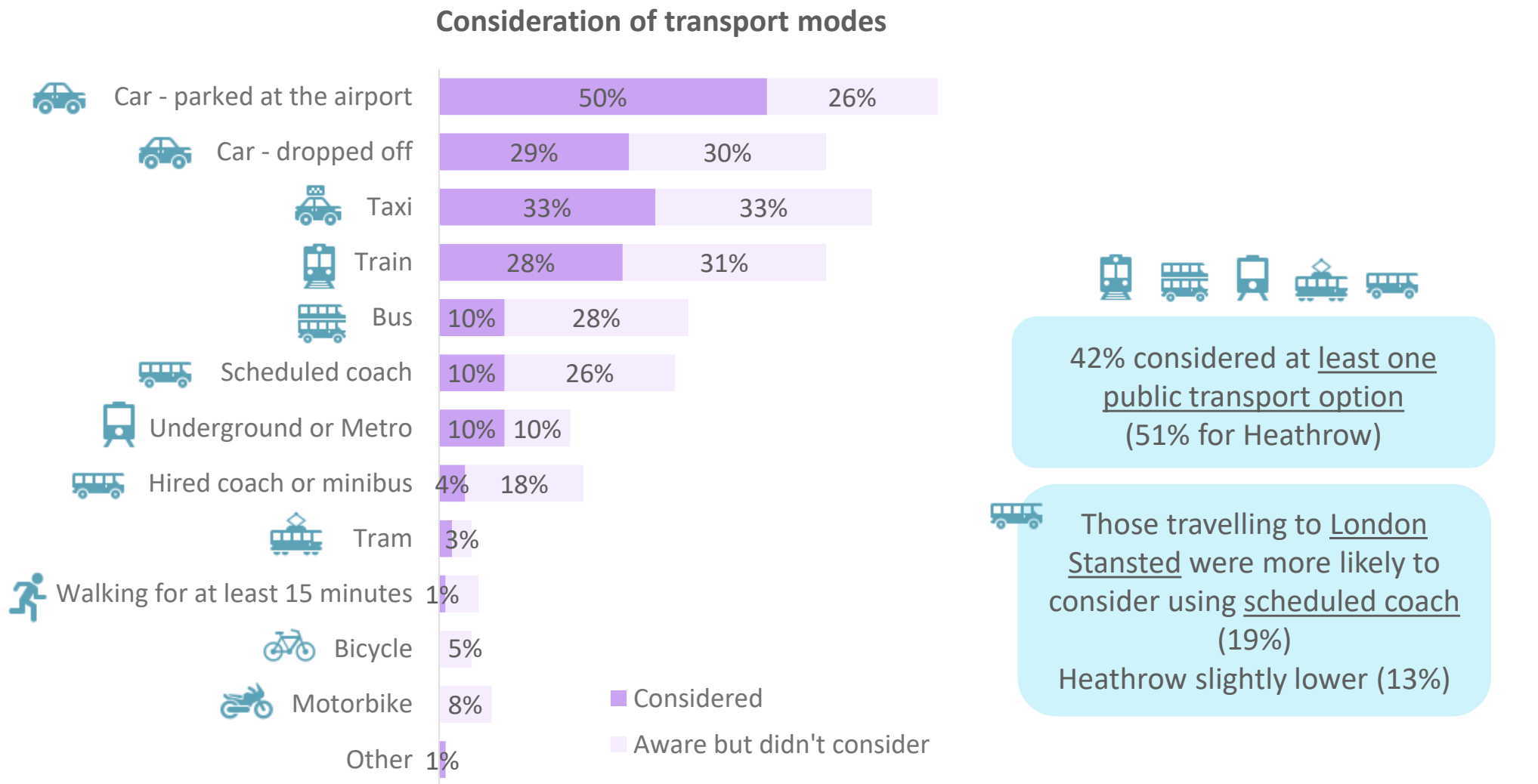
Modes of transport available for most recent flight (top 6)



A10. Which of the following transport options did you believe were available to you when travelling to [AIRPORT SELECTED]?

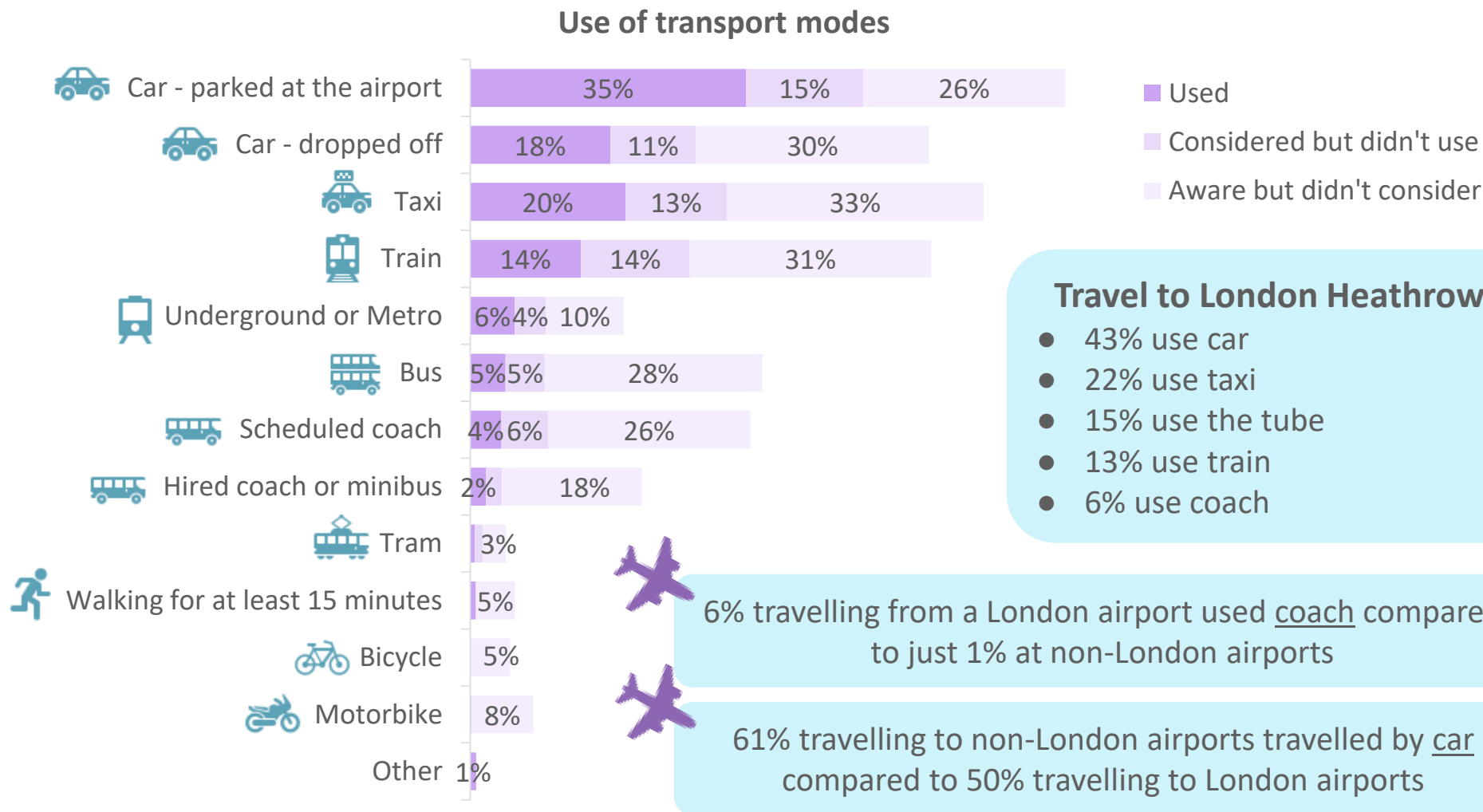
Base: All respondents aware of different transport options available (4,884)

Bus, coach and taxi suffer an especially large drop-off between awareness and consideration



B2a. When deciding how to travel to the airport which of the following modes of transport did you consider using...? Base: All respondents (5,009)

Car and taxi dominate transport to the airport, although train is a significant player also (as it tube for Heathrow). Coach is used by only a small proportion of passengers



B2b. And which mode(s) did you use to travel to the airport? Base: All respondents (5,009)

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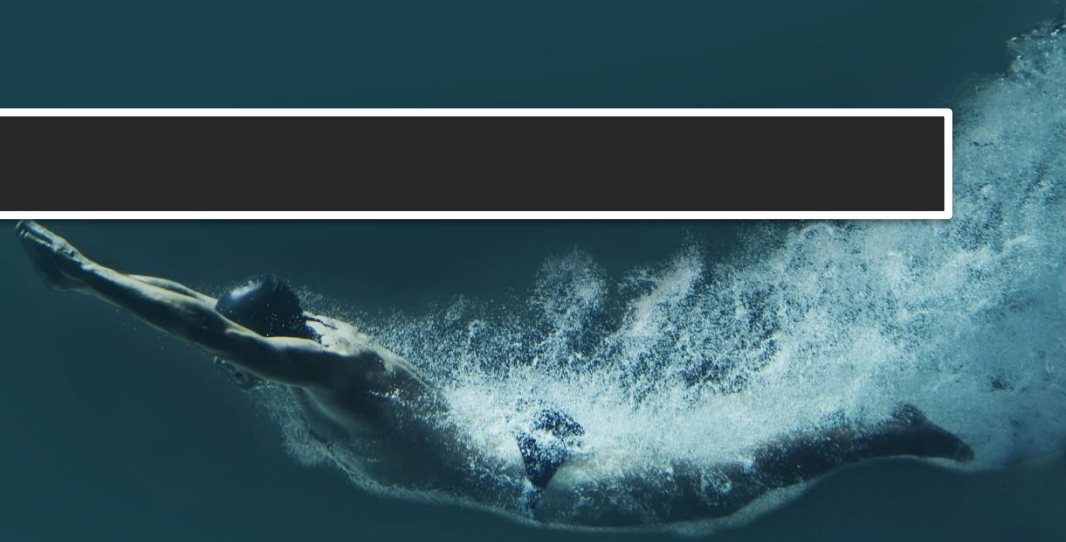
Importance ratings

Satisfaction with travel

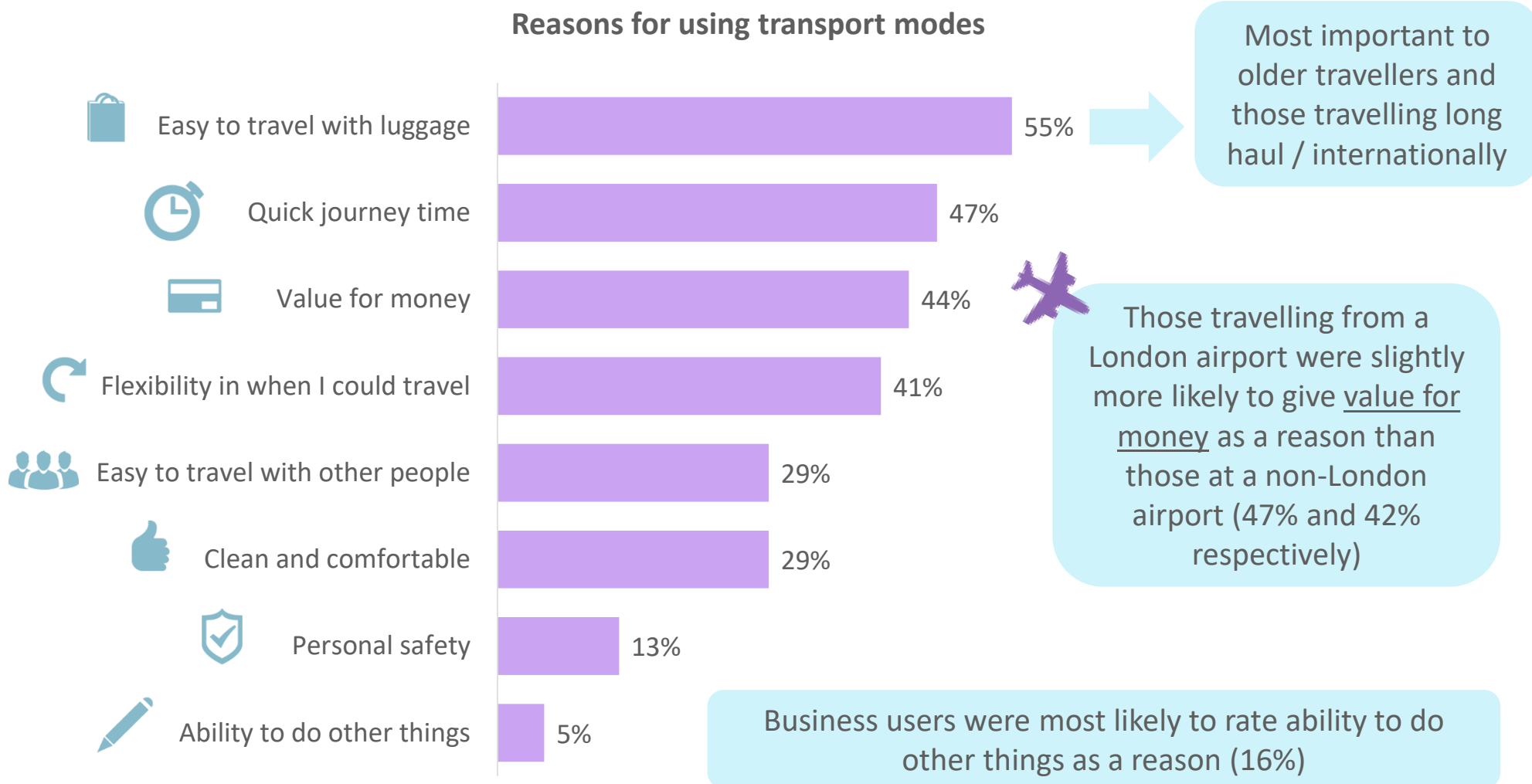
Coach rejecters

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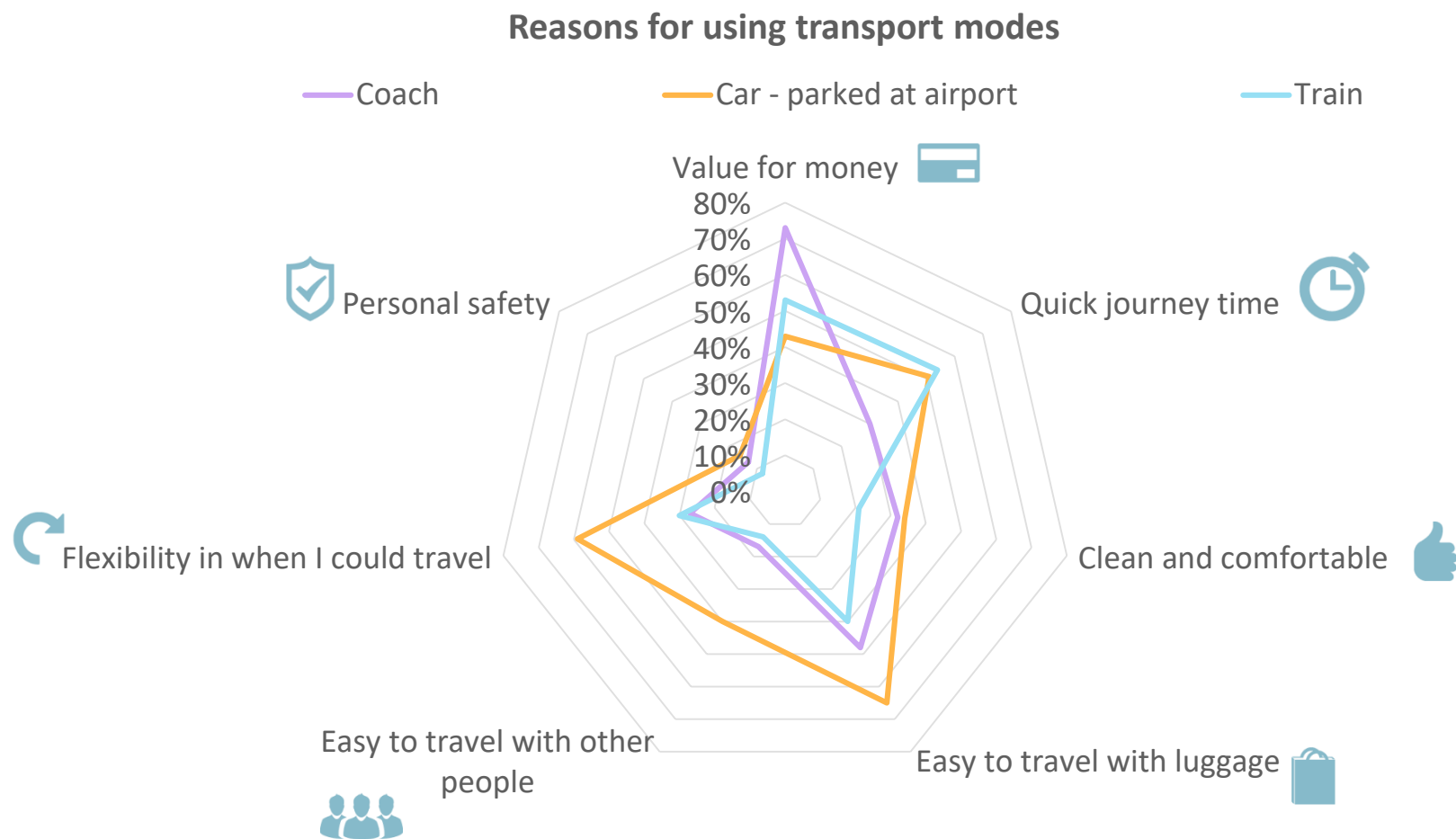
Conclusions and recommendations



The most common front-of-mind reason for choosing a mode of transport is ease of travelling with luggage



VFM is the most common reason for travelling by coach, whilst easy to travel with luggage is the most common reason for car. Ability to do other things was not relevant to a lot of people

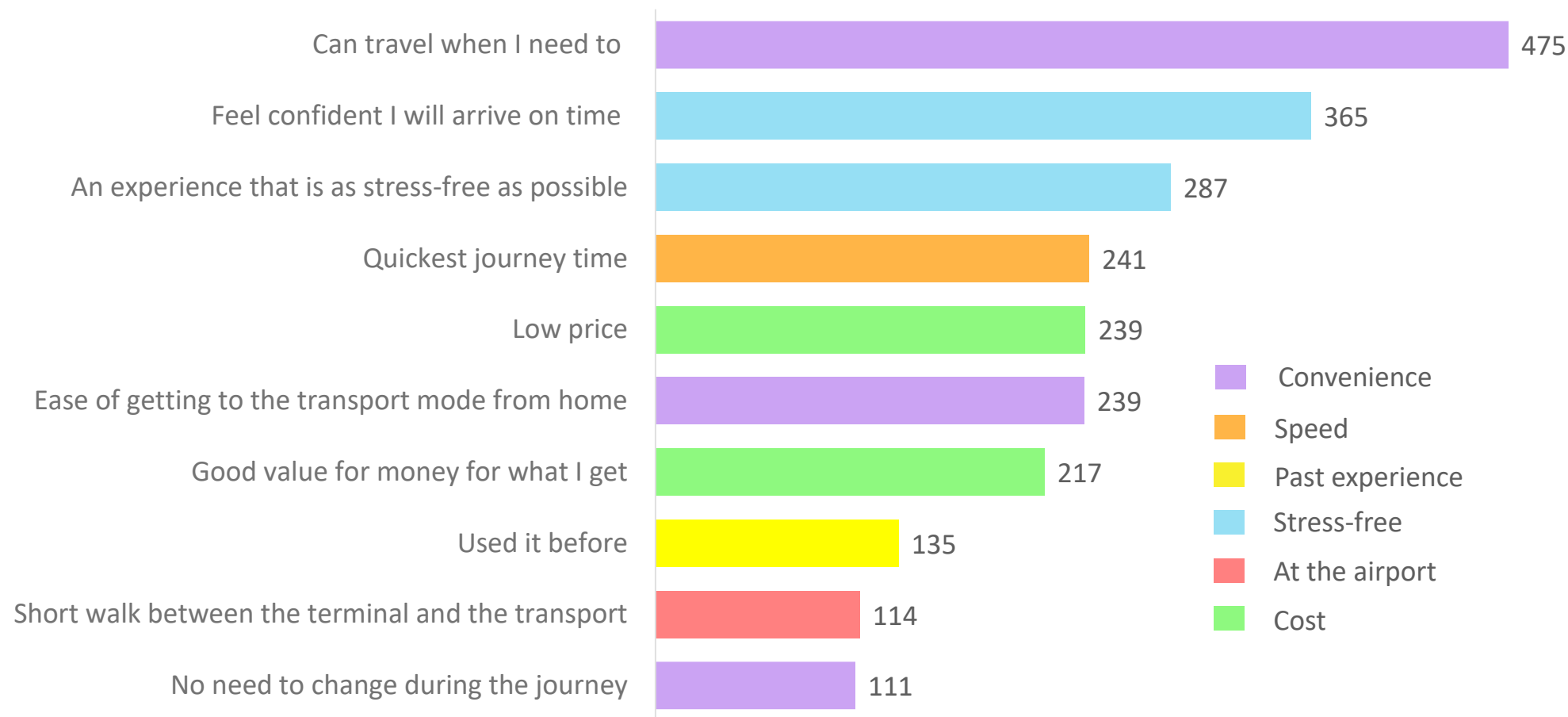


Summary of MaxDiff results on importance of factors when travelling to an airport

- The most important factor is can travel when I need to, followed by feel confident I will arrive on time
- Quickest journey time, low price and ease of getting to the transport mode from home are almost equally important
- Other convenience factors are much less important; but used it before and no need to change during the journey are both above average
- For people who travel by public transport low price is third most important and for people who travelled by coach this is the most important factor

The most important considerations when travelling to an airport are being able to travel when I need to and feeling confident I will arrive on time

Important considerations when travelling to the airport

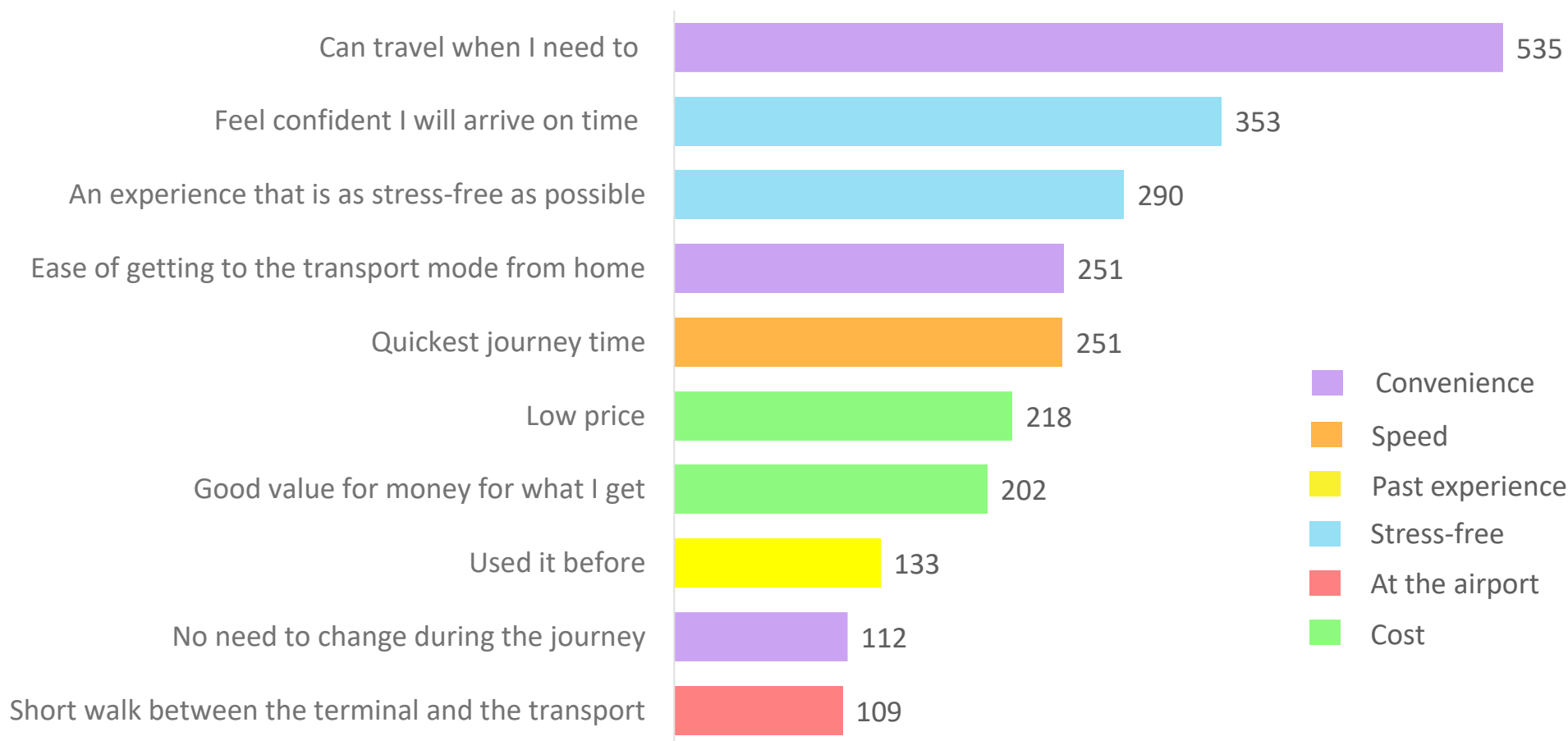


D1. You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport. On each screen please select which is most important to you and which is least important. Base: All respondents (5,009)

For people who travel to the airport by car, ease of getting to the transport mode from home is slightly more important with less importance attached to price and VFM



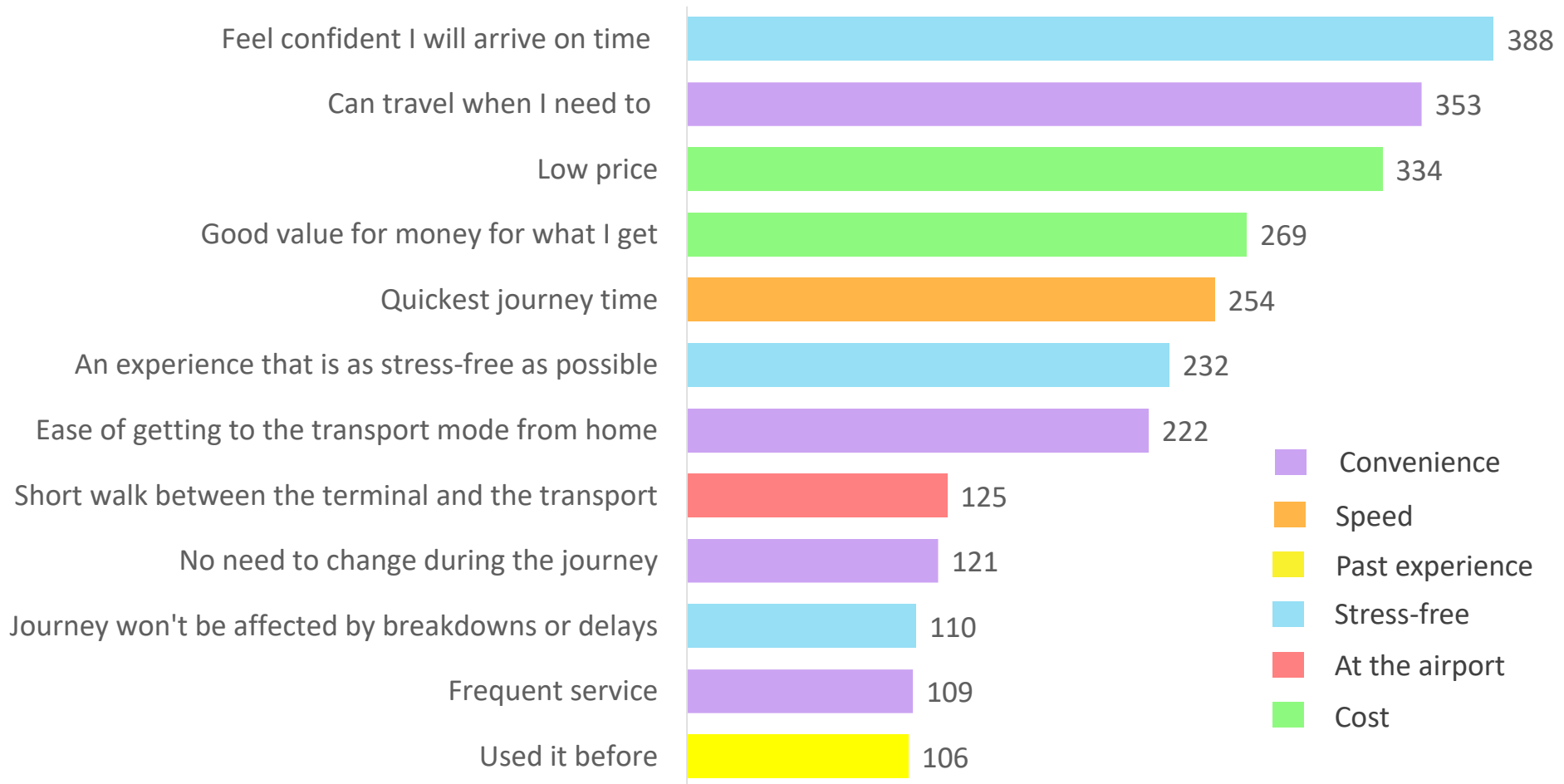
Important considerations for those travelling to the airport by car



D1. You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport. On each screen please select which is most important to you and which is least important. Base: All respondents using car as the main mode of transport (2,636)

For people who travelled to the airport by public transport, low price is significantly more important, but still only the third most important selection factor

Important considerations for those travelling to the airport by public transport

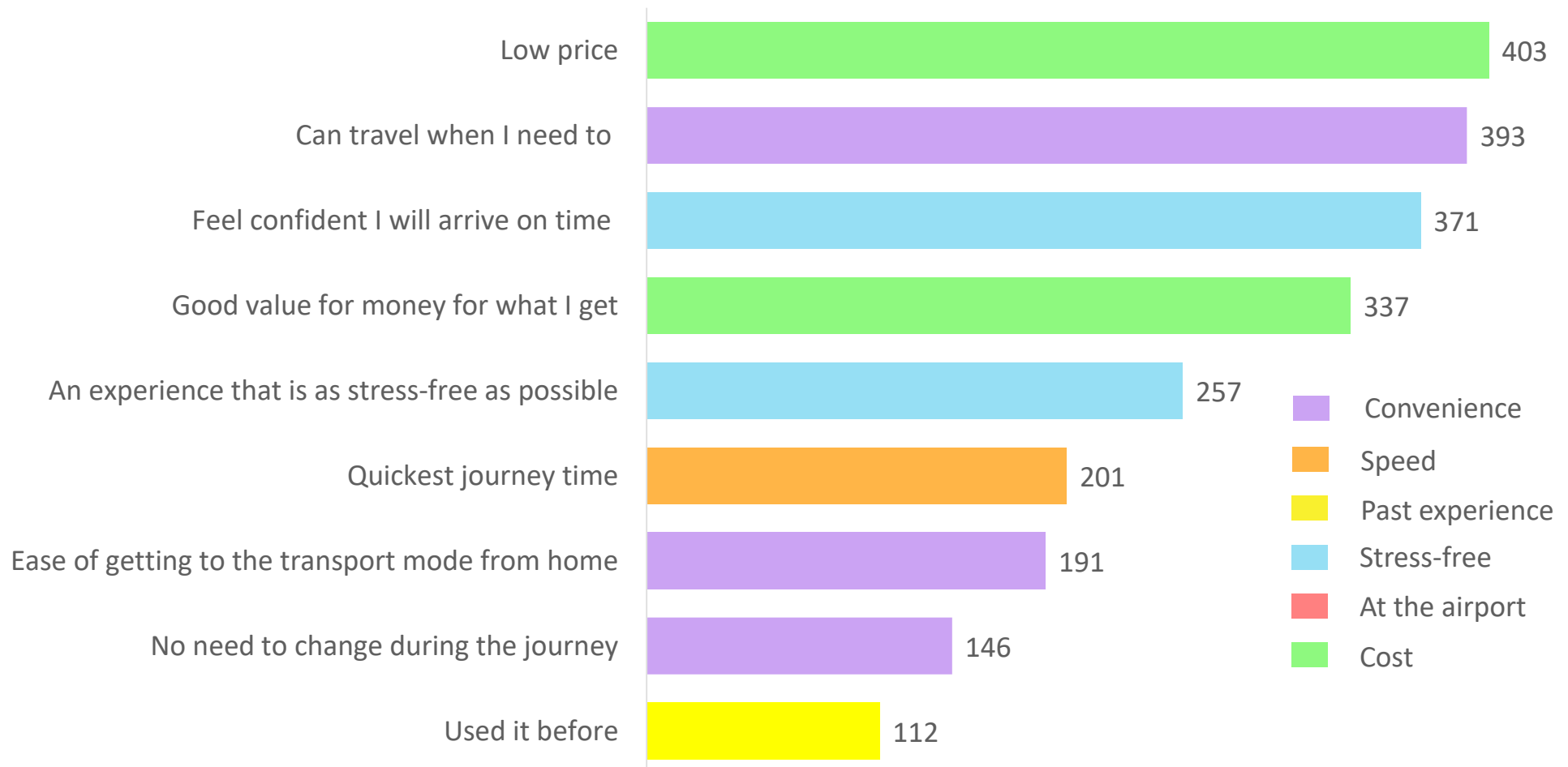


D1. You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport. On each screen please select which is most important to you and which is least important. Base: All respondents using public transport as the main mode (1,259)

People who travel to the airport by coach have very different priorities to the remainder of passengers, attaching much more importance to low price



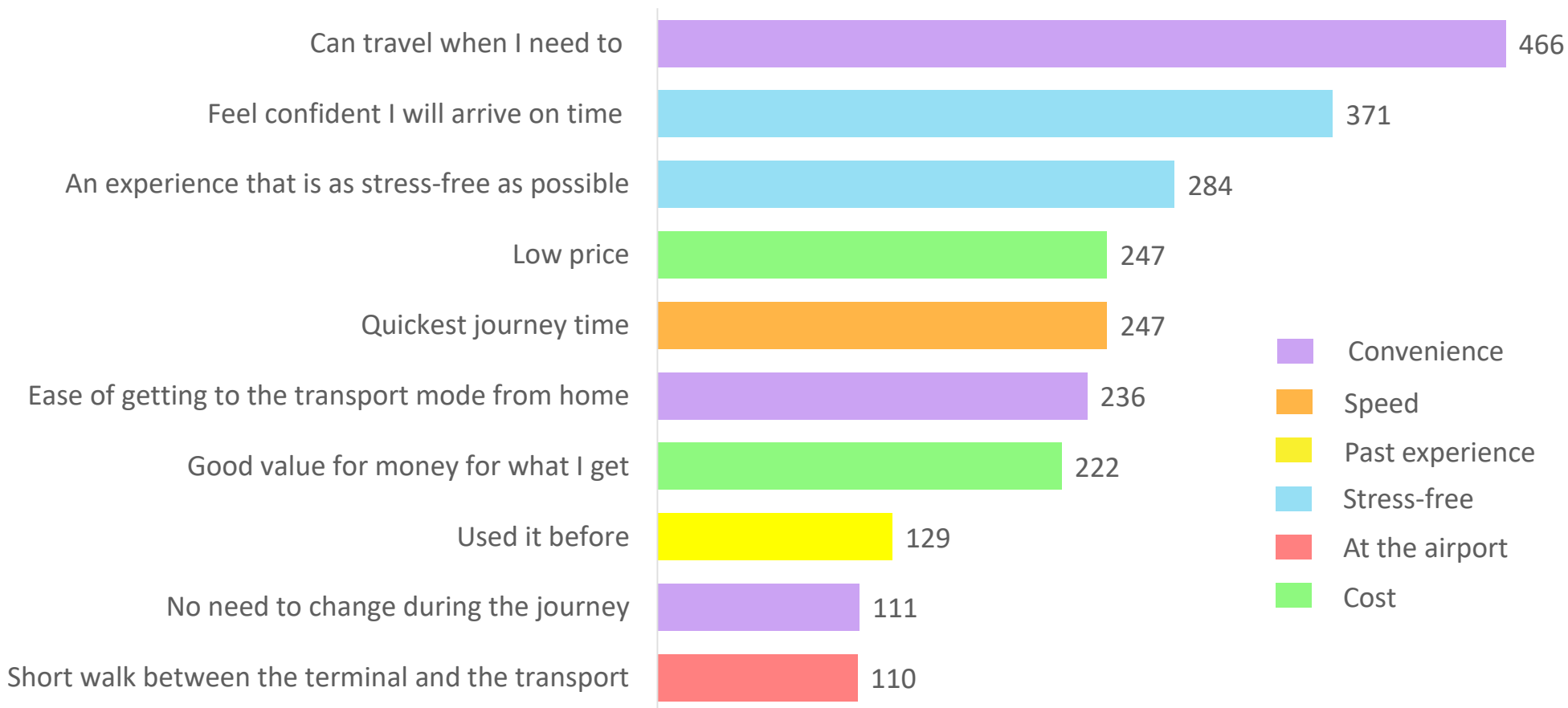
Important considerations for those travelling to the airport by coach



D1. You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport. On each screen please select which is most important to you and which is least important. Base: All respondents using coach as the main mode (196)

Those travelling from a London Airport have similar priorities to the overall sample with convenience and having a stress free journey of upmost importance

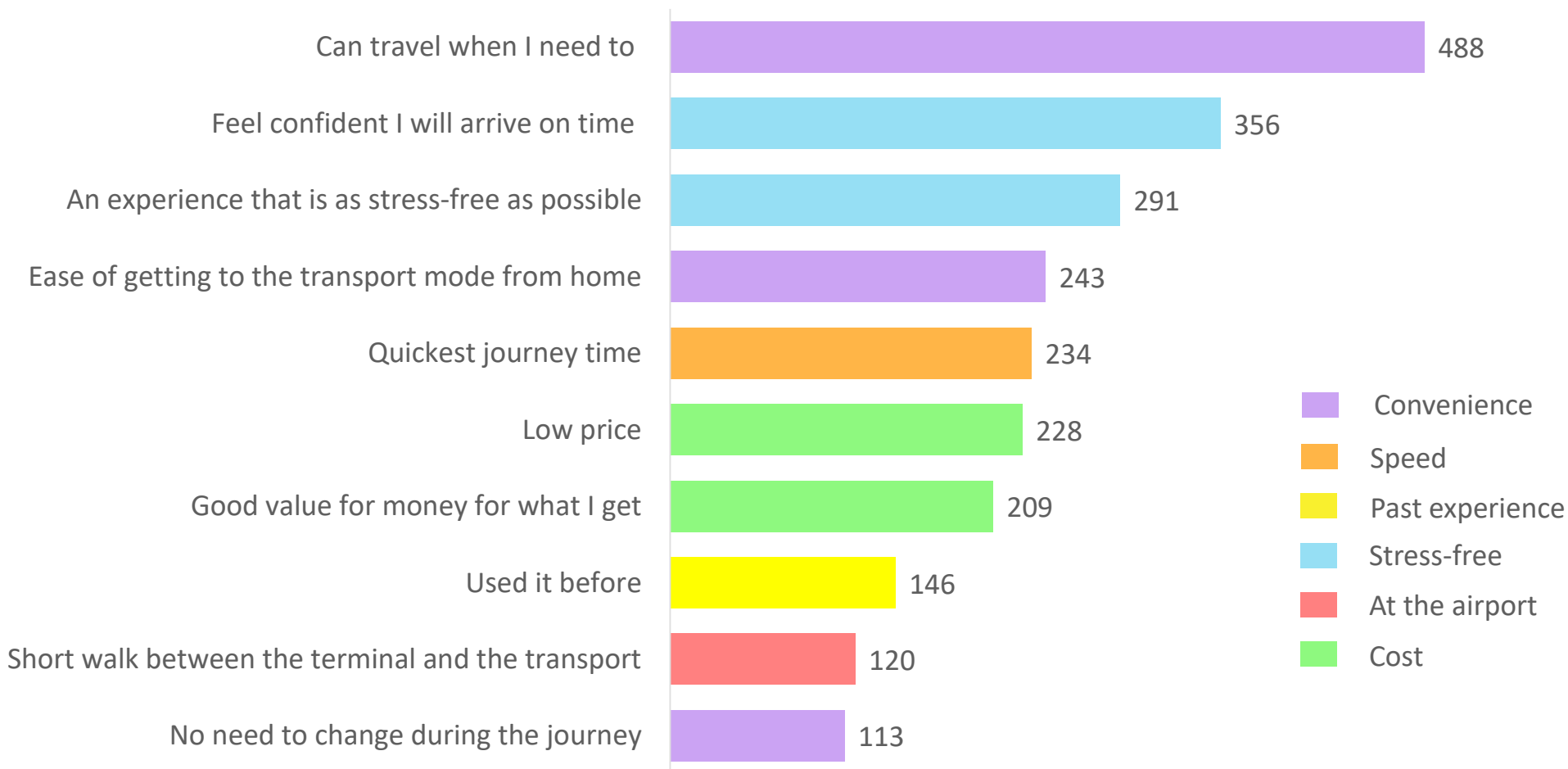
Important considerations for those travelling from London airports



D1. You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport. On each screen please select which is most important to you and which is least important. Base: All respondents travelling from a London airport (2,986)

Low price is less of a priority for those travelling to non-London airports compared to those travelling to London airports

Important considerations for those travelling from non-London airports



D1. You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport. On each screen please select which is most important to you and which is least important. Base: All respondents travelling from a non-London airport (2,023)

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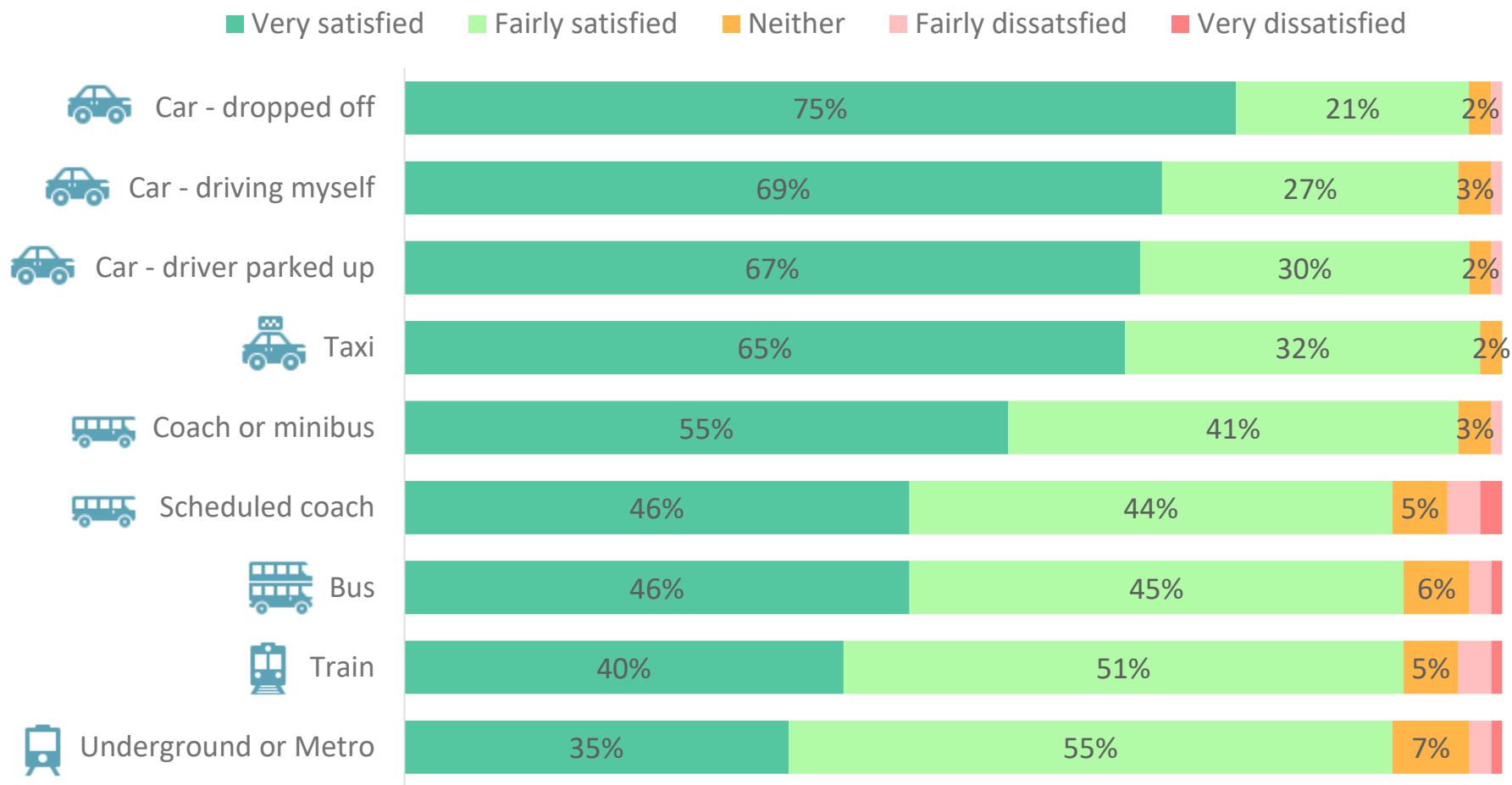
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Satisfaction with private transport and to a lesser extent taxi is considerably better than all modes of public transport

Overall satisfaction by main mode used



NB. Only showing answers with a base size over 50

E1. Thinking about this most recent trip to the airport, how satisfied or dissatisfied were you overall with your travel experience by [INSERT MAIN MODE SELECTED AT B2c]? Base: All respondents (5,009)

Satisfaction with coach is lower on the two most important aspects to passengers

	TOTAL	Bus	Car – driving myself	Car – driver parked	Car – dropped off	Tour Coach or minibus	Scheduled coach	Taxi	Train	Tube or Metro
Ease of getting to my destination	94%	90%	95%	96%	96%	94%	90%	96%	93%	89%
Ease of planning the journey	94%	87%	97%	94%	96%	91%	94%	94%	93%	88%
Personal safety at all stages of the journey	93%	87%	96%	95%	96%	93%	95%	93%	89%	82%
Punctuality	93%	85%	96%	95%	95%	89%	82%	94%	89%	82%
Ease of travelling with luggage	92%	81%	97%	95%	95%	93%	94%	95%	84%	70%
Flexibility in when I could travel	92%	85%	96%	94%	92%	86%	81%	95%	86%	92%
Ease of travelling with my family or colleagues	92%	85%	95%	95%	94%	95%	88%	93%	84%	80%
How quick the journey was	91%	79%	94%	92%	95%	90%	81%	94%	86%	76%
Cleanliness and comfort	90%	81%	96%	93%	95%	92%	87%	93%	80%	64%
Value for money	88%	87%	92%	93%	94%	90%	86%	83%	76%	87%
Cost	87%	88%	92%	92%	92%	86%	87%	81%	75%	83%
Ability to do other things whilst travelling	69%	65%	57%	73%	77%	71%	75%	70%	74%	58%

NB. Total satisfied excluding N/A

>5% delta from TOTAL shown in red

E3. Thinking about travelling to the airport by [INSERT MAIN MODE SELECTED AT B2c] how satisfied were you with...?

Base: All respondents (5,009)

Although levels of dissatisfaction are low those travelling by scheduled coach or train were most likely to express dissatisfaction with their journey mostly due to issues with punctuality



Scheduled coach 5% dissatisfied

“Coach never showed up and the next coach wouldn't take the people from the previous coach that never showed up so we had to wait for 2 buses and then had to run through the airport to make sure we didn't miss our flight”

“Coach was 40 minutes late”

“Coach was late due to bad weather & that was ok. But then driver had to take a break and all but one on the coach missed their connections”



Train 4% dissatisfied

“Train travel is very expensive”

“It was a scheduled train that runs to Gatwick but it had no space for luggage! Spent the whole, long and tedious journey cramped up with luggage trying to keep it out of the way of other people”

“Delayed trains”

“First train was cancelled!”

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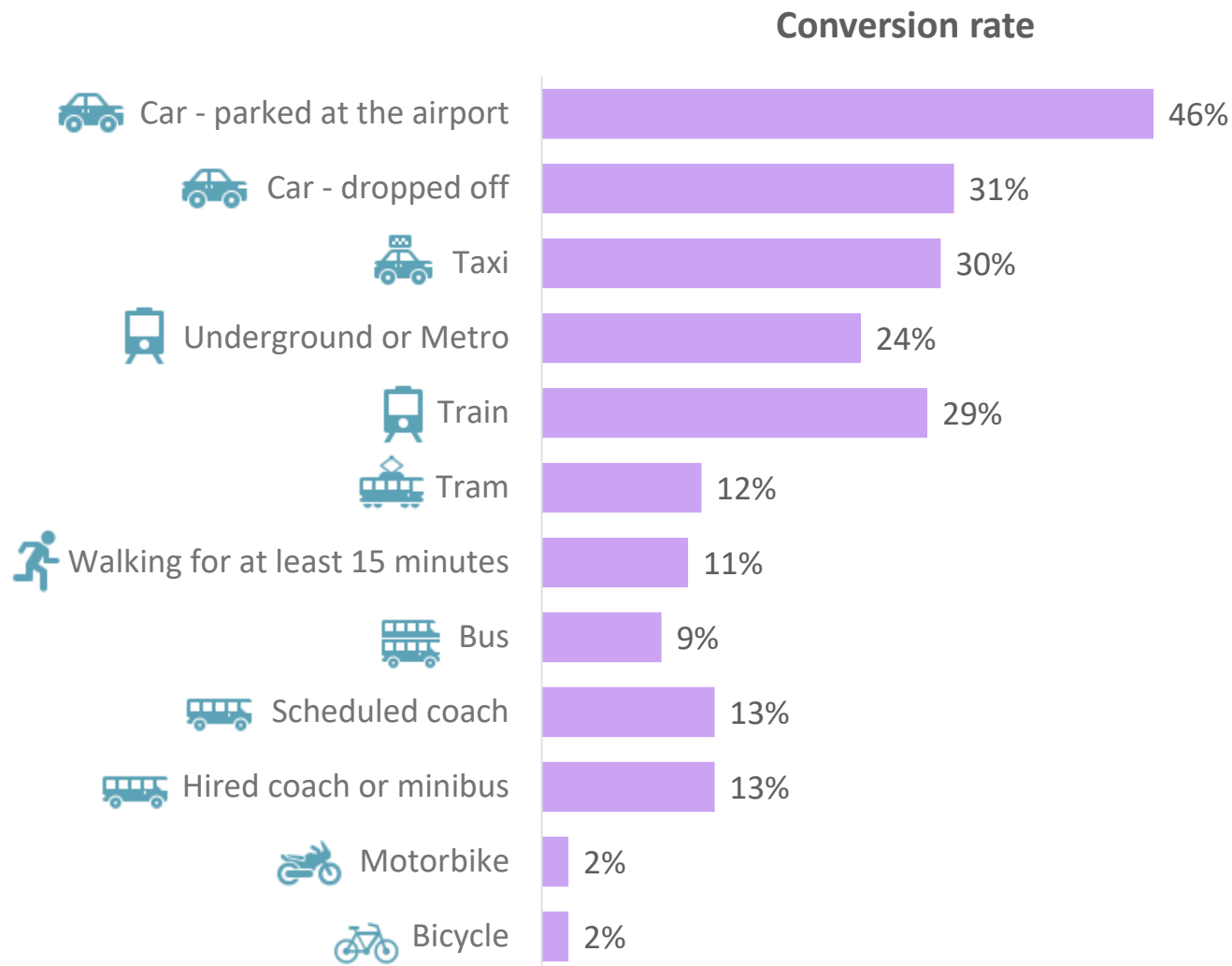
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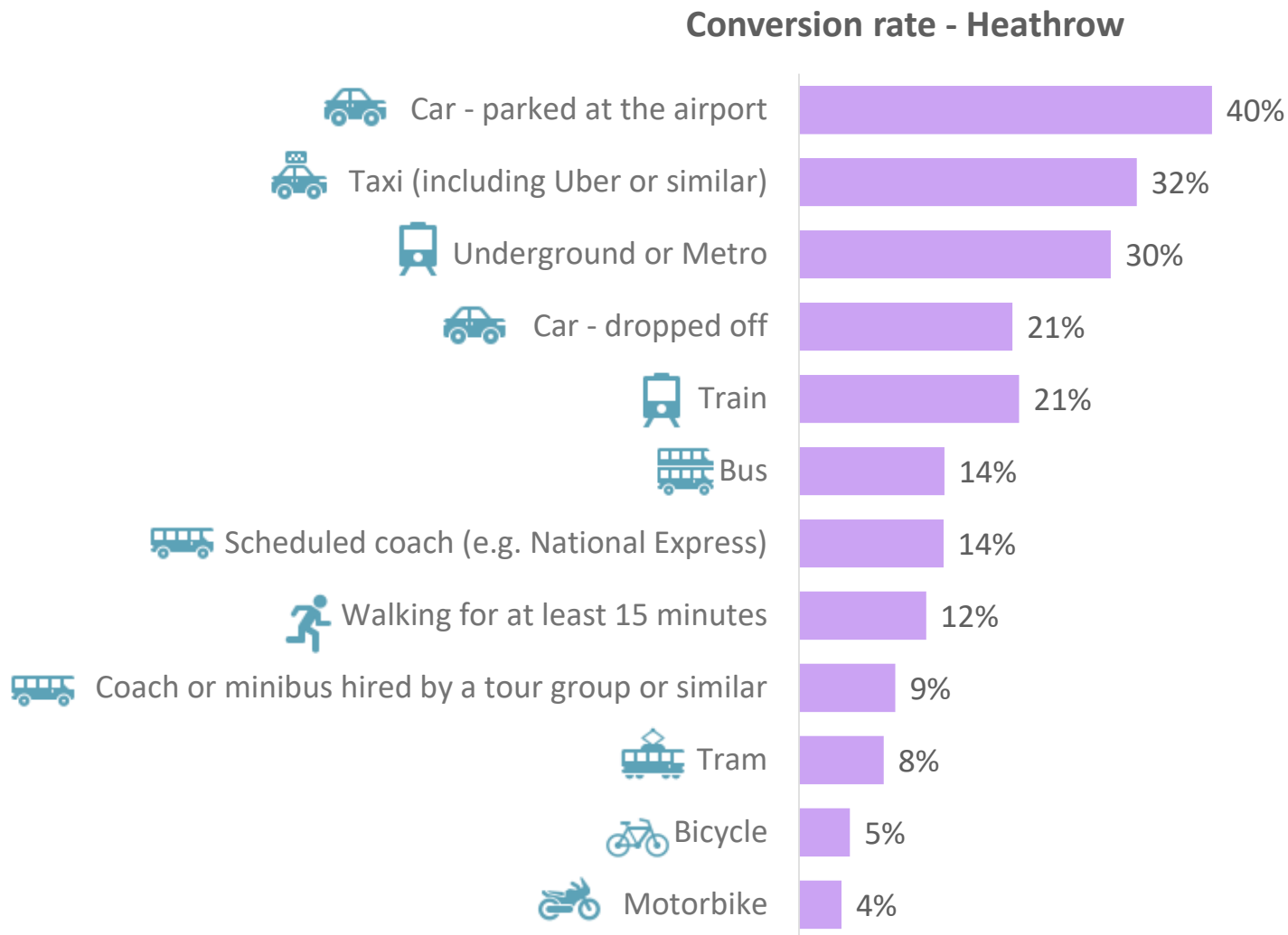


Only one in ten aware of coach are choosing to use it, close to the worst conversion rate



A10. Which of the following transport options did you believe were available to you when travelling to [AIRPORT SELECTED]? Base: All respondents aware of different transport options available (4,884) / B2b. And which mode(s) did you use to travel to the airport? Base: All respondents (5,009)

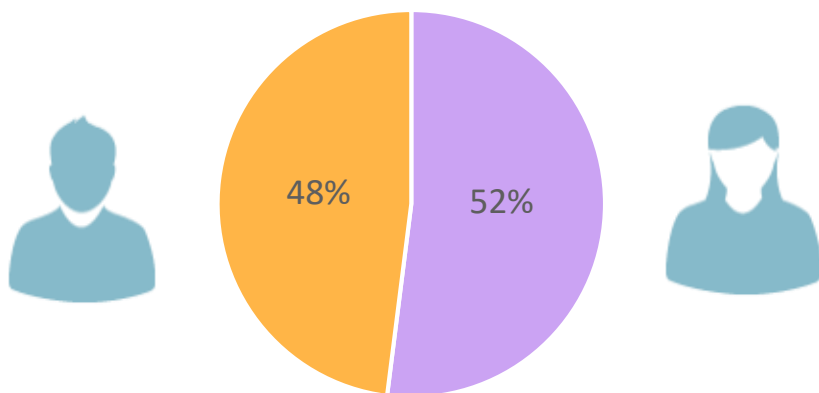
The conversion rate for travelling to Heathrow by scheduled coach is slightly higher than average



A10. Which of the following transport options did you believe were available to you when travelling to [AIRPORT SELECTED]? / B2b. And which mode(s) did you use to travel to the airport?
Base: All travelling from Heathrow (1,228)

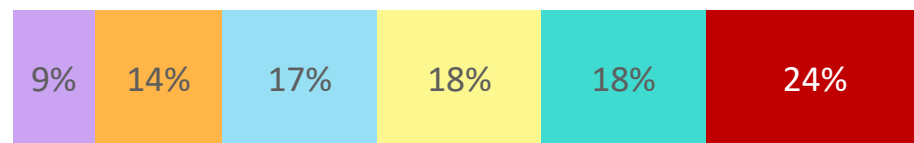
People who are aware of coach, but don't consider it, are very similar to the overall sample in terms of demographics but have a higher income

Gender

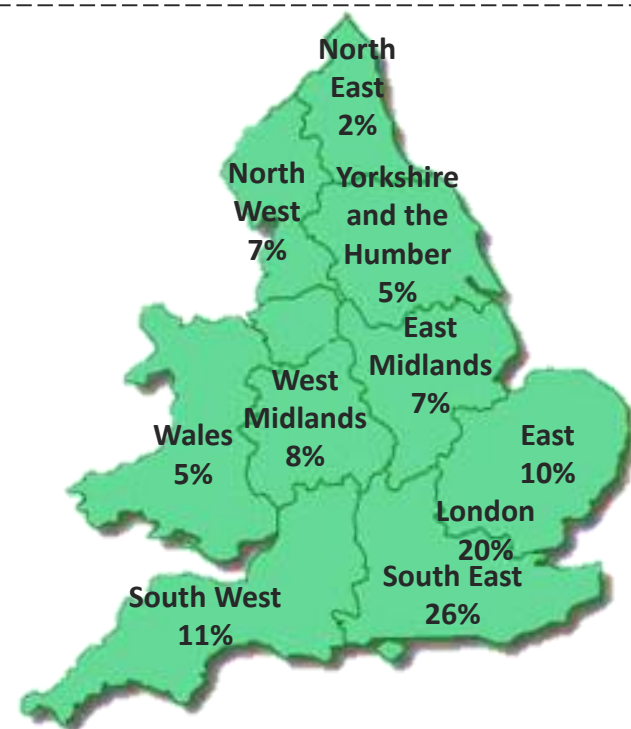
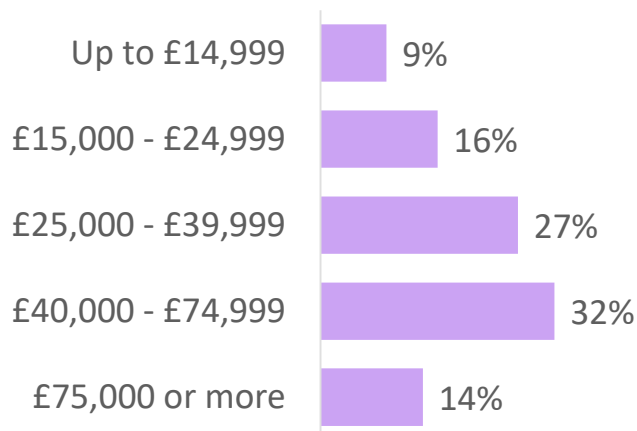


Age

16-24 25-34 35-44 45-54 55-64 65+



Household Income

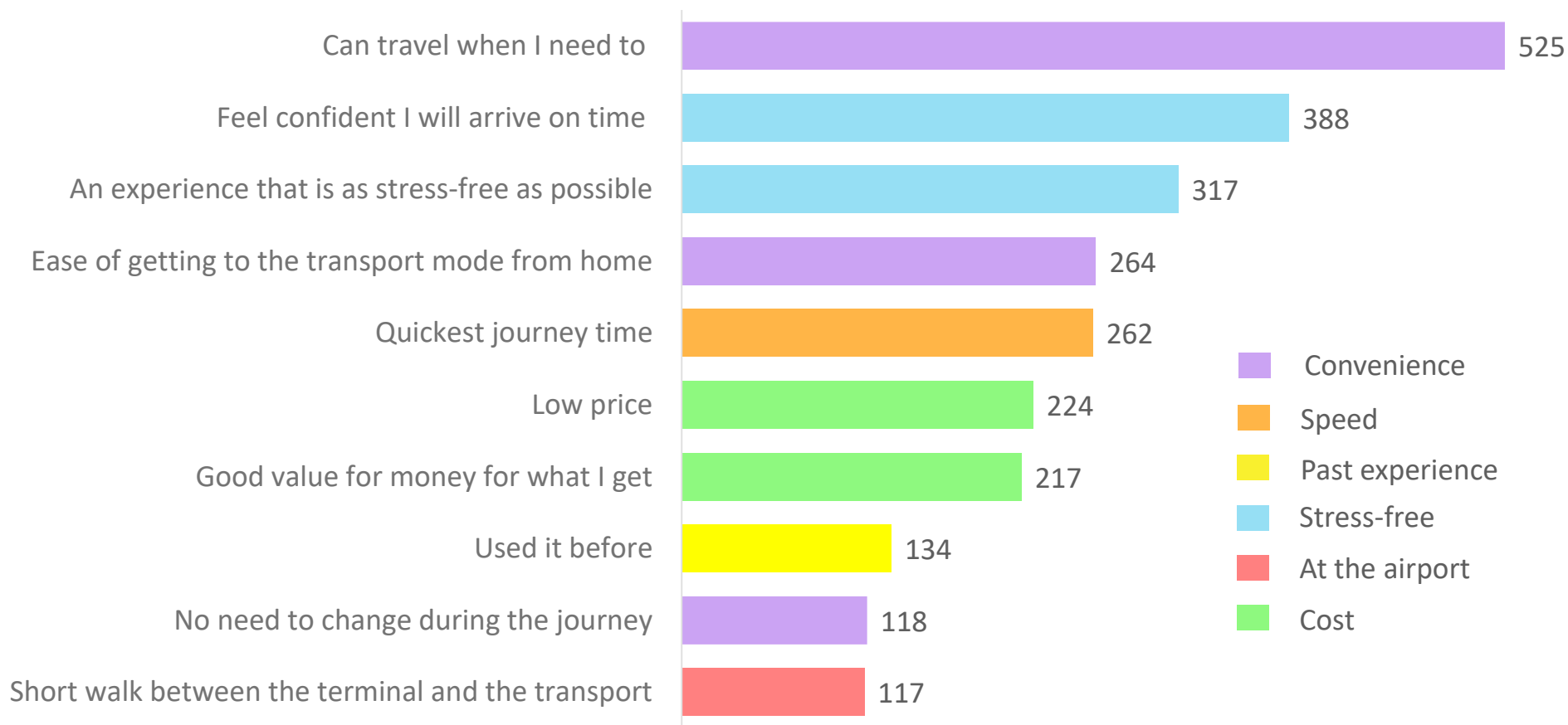


S1. Which country do you live in? / S2a. In which region of England do you live? / S3. Are you... / S4. How old are you? / S5. How much is your total annual household income before taxes?

Base: All respondents who know about and don't consider coach (1,325)

Ease of getting to the transport mode from home is more important for people who aware of coach, but don't consider. Being able to travel when they need is still most important

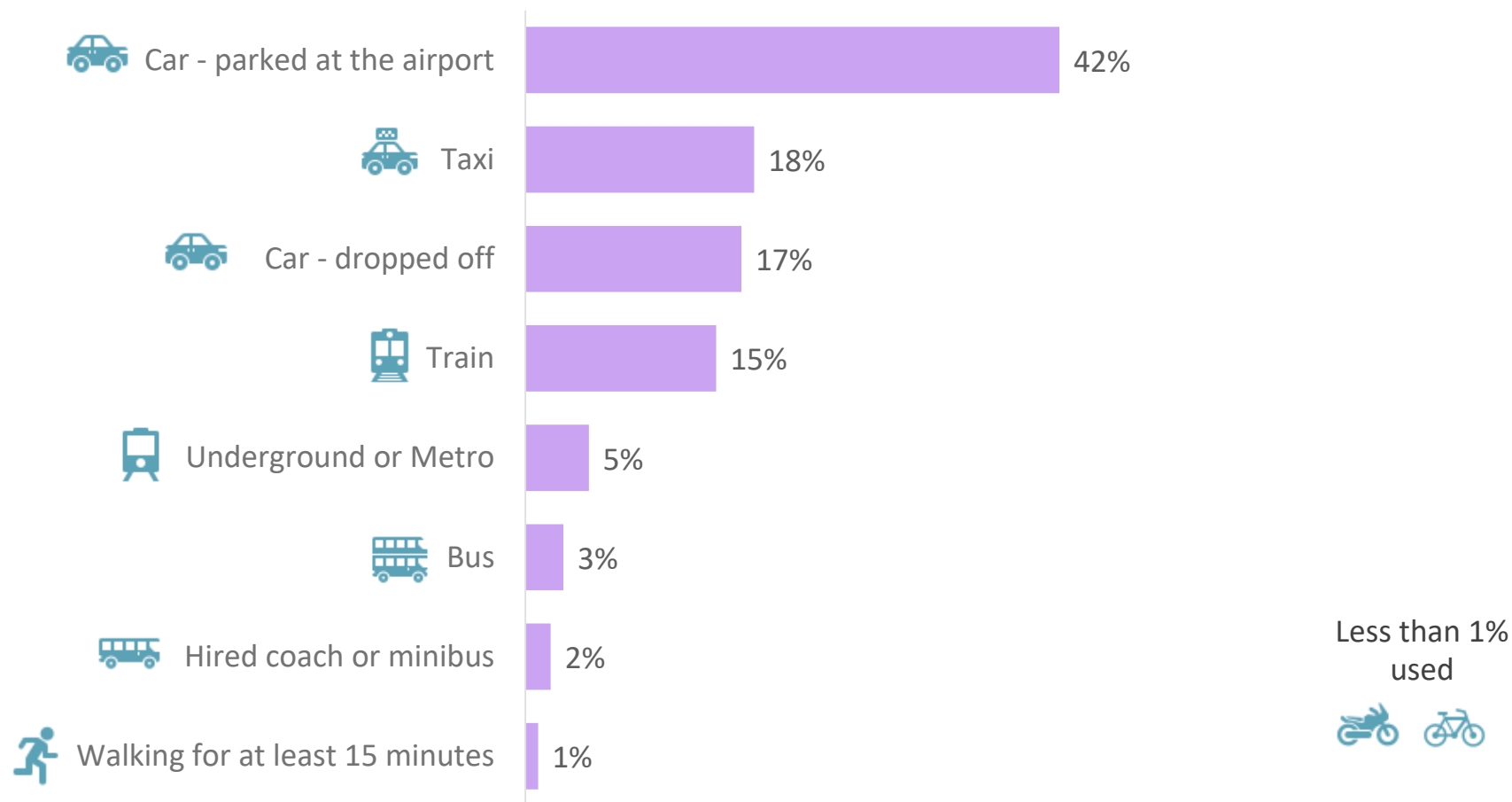
Important considerations for those who know about but don't use coach



D1. You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport. On each screen please select which is most important to you and which is least important. Base: All respondents who know about and don't consider coach (1,325)

Over three quarters of those who know about, but don't consider coach, use the car or taxi to travel to the airport

Modes used by those who know about but don't consider coach



B2b. And which mode(s) did you use to travel to the airport? Base: All respondents who know about but don't consider coach (1,325)

People who know about, but don't consider coach, would like a more convenient and frequent service

"I would need to know that I could reach it from my home, I have limited mobility so I would like to be able to the stop without having to drive there/lug luggage/walk too far. It would need to be easy to get on and off the coach as stairs can cause me an issue. The cost would need to be reasonable...And I would need to know that seats were guaranteed both so I can sit but also so my children would be safe."

"It would have to be reliable and at a reasonable frequency to not add significant extra time on journey: there is only one public bus an hour to my closest town so the lack of an integrated public transport policy is the biggest barrier for me"

"Very frequent service so I would have to wait no longer than 15 mins to depart the airport. Direct service to the town - I would not be happy with stopping in multiple towns en route."

"I don't think that anything would make me use it. Falcon already exists between Exeter and Bristol, but timings are poorly aligned with flights and it has all the usual disadvantages of much slower journey time, lack of comfort, and inconvenience of getting from home to the boarding point (a convoluted and expensive bus journey with changes, which further reduces the appeal. Driving will always win against this.)"

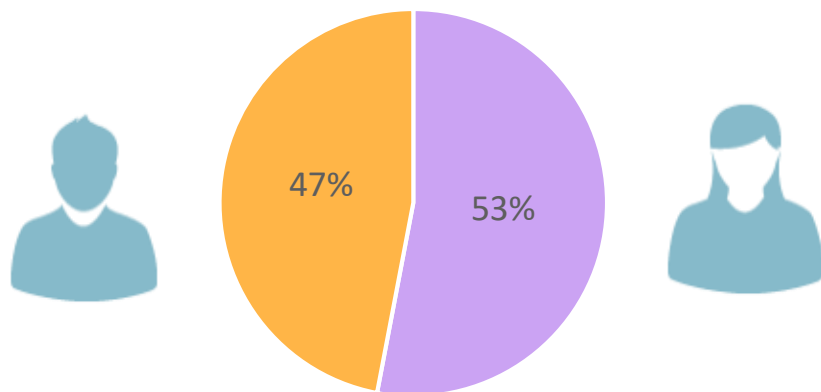
"For people like me who has very young children it would helpful to have the chance to bring a car seat and bring the on board safely with you. Plus it would be nice if they would run more often, not just every 50 minutes."

F6. Finally, if a new coach service was introduced from your nearest town to [AIRPORT SELECTED] what would it have to offer for people like you to try it out?

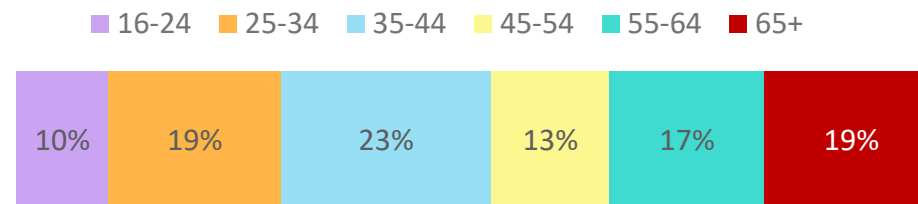
Base: All respondents who know about but don't consider coach (1,325)

People who consider the coach, but don't use it, are very similar to the overall sample in terms of demographics but they have a lower income

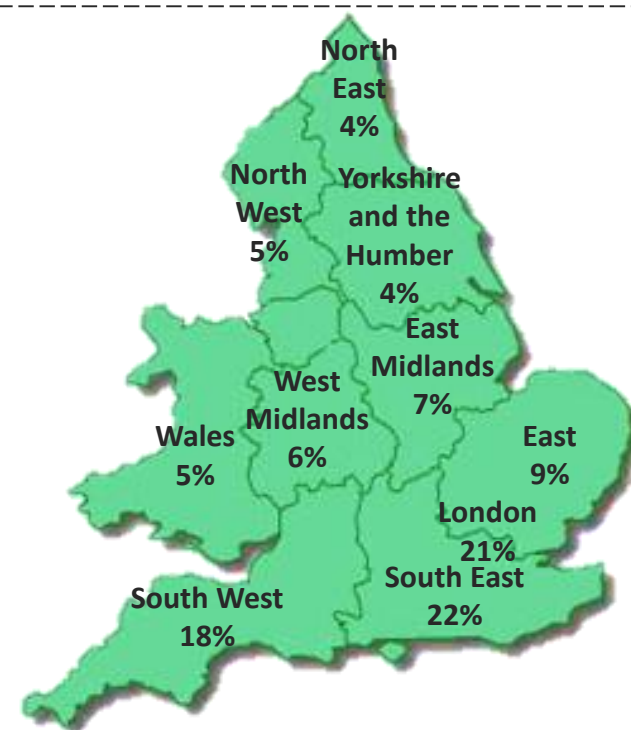
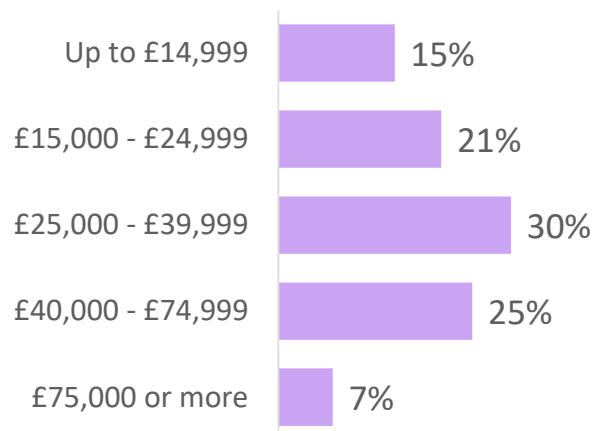
Gender



Age



Household Income



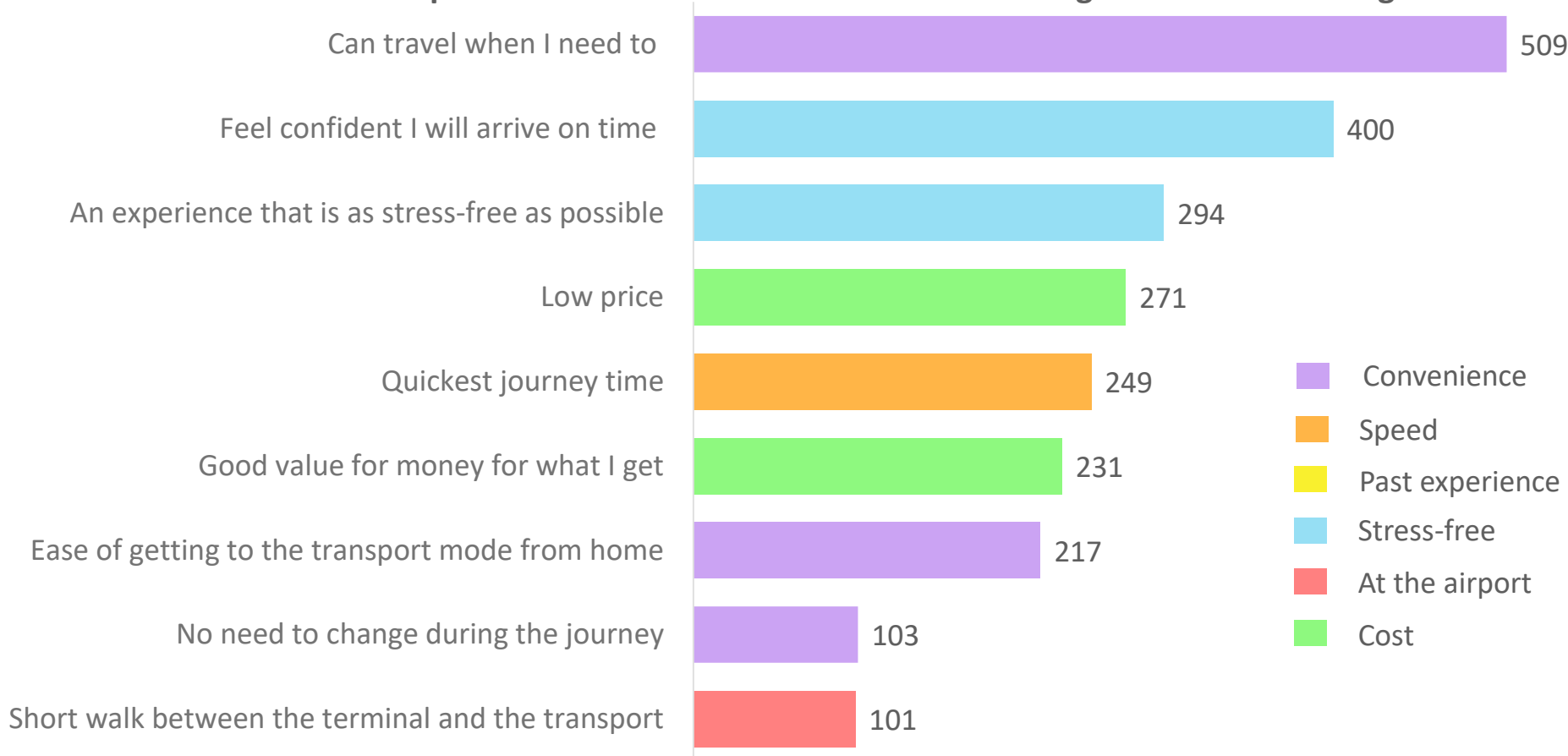
S1. Which country do you live in? / S2a. In which region of England do you live? / S3. Are you... / S4. How old are you? / S5. How much is your total annual household income before taxes?

Base: All respondents who know about and consider coach but don't use it (281)

People who consider the coach, but don't use it, have different proprieties to actual coach users

Low price is less important than for those who do use coach and considerably less important than the three key factors

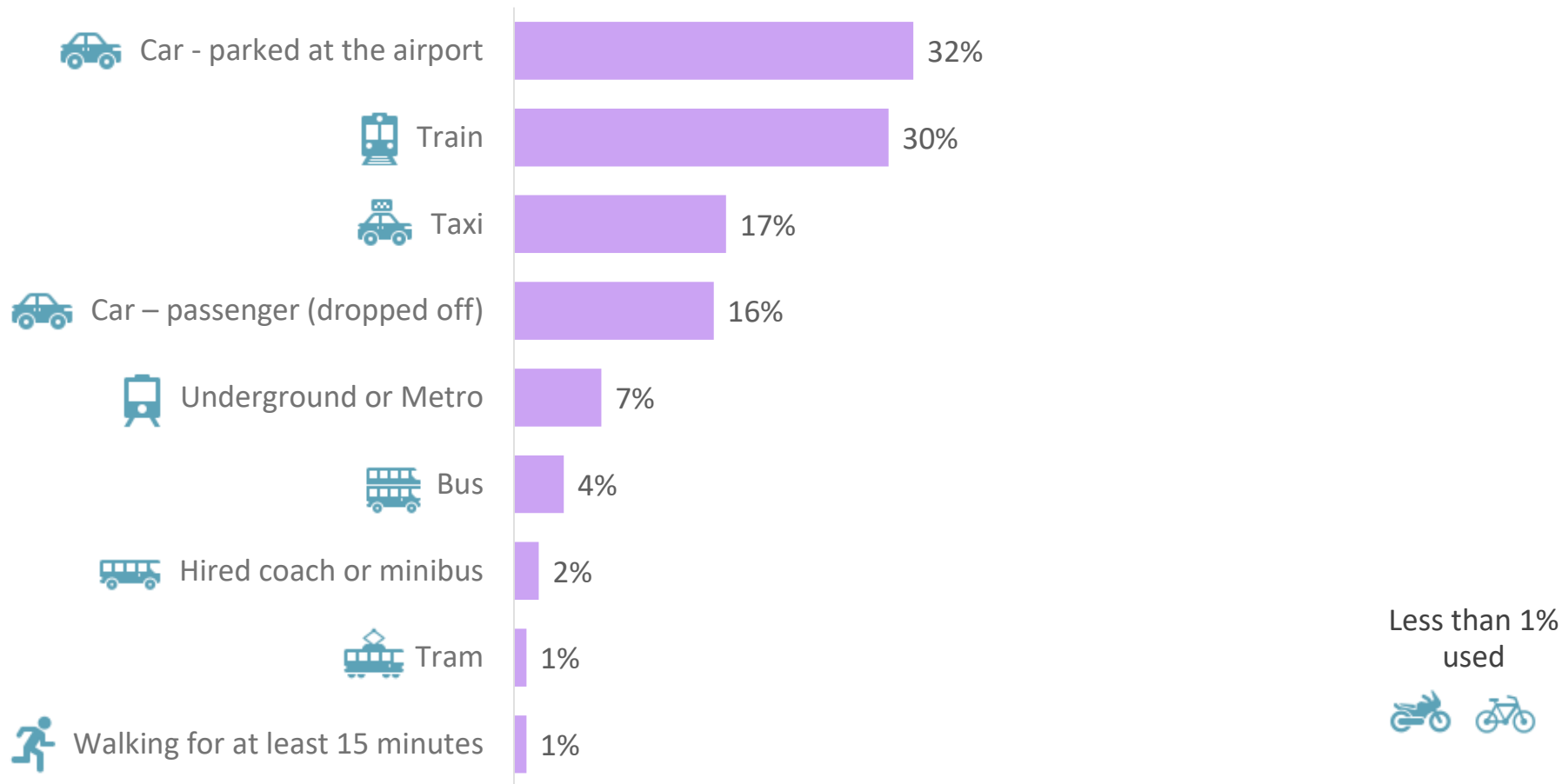
Important considerations for those considering coach but not using it



D1. You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport. On each screen please select which is most important to you and which is least important. Base: All respondents who know about and consider coach but don't use it (281)

Just under half of those who consider coach, but don't use it, take the car to travel to the airport, whilst four in ten use other public transport

Modes used by those who know about and consider coach



B2b. And which mode(s) did you use to travel to the airport? Base: All respondents who know about and consider coach but don't use it (281)

People who consider coach include those wanting a service that offers value for money and others wanting a higher specification service

"It would have to be a more competitive price and would need to use modern up-to-date vehicles which provided more comfort than coach travel often provides (e.g. better air conditioning in hot weather)"

"Really cheap fares, family friendly environment, drop you off right by the required terminal & have lots of scheduled times so there was minimal hanging around"

"Value for money, clean comfortable seats and variable travel times."

"Good value for money, being cheaper than cost of fuel & parking if using my car. Flexible departure times and not many stops along the journey that would make it take twice as long as if using the car"

"Student discounts, promotions, Wi-Fi, new up to date coaches with plug sockets on"

F6. Finally, if a new coach service was introduced from your nearest town to [AIRPORT SELECTED] what would it have to offer for people like you to try it out?

Base: All respondents who know about and consider coach but don't use it (281)

Introduction and methodology

Most recent flight

Booking transport to the airport

Travelling to the airport

Importance ratings

Satisfaction with travel

Coach rejecters

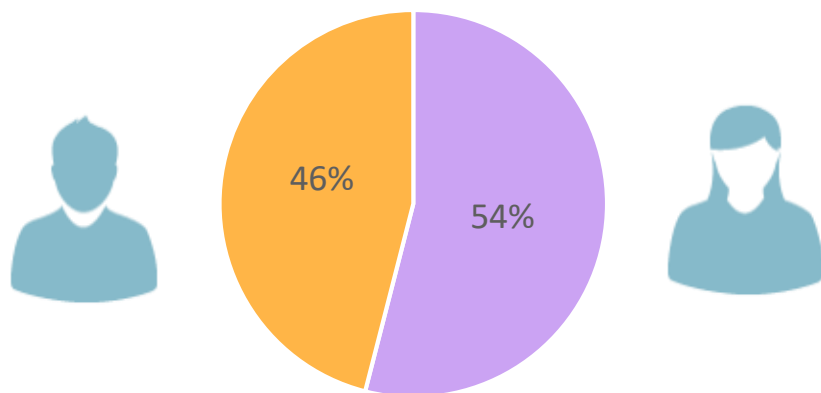
Coach travel

Conclusions and recommendations



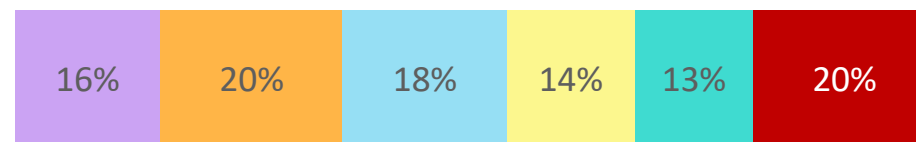
People who do use coach are similar to the overall sample in terms of demographics but they are slightly younger and have a lower income

Gender

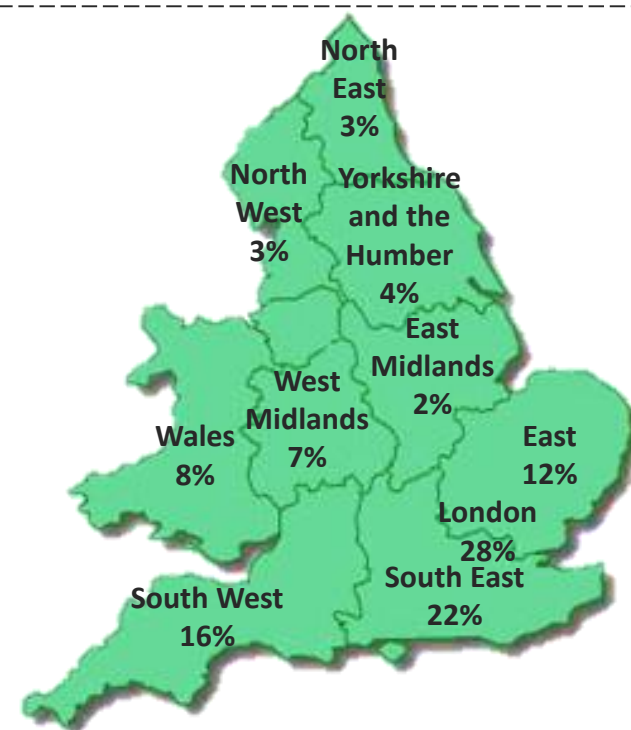
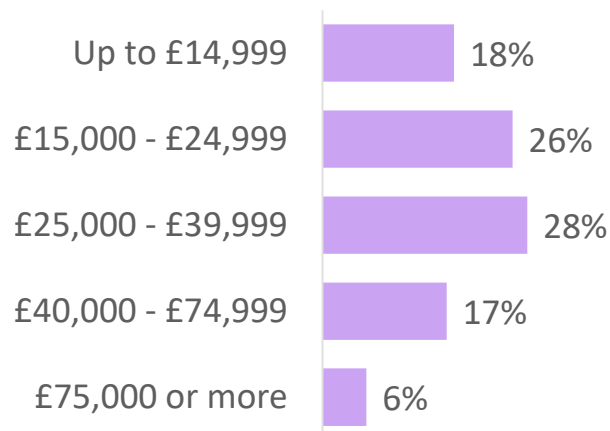


Age

16-24 25-34 35-44 45-54 55-64 65+



Household Income



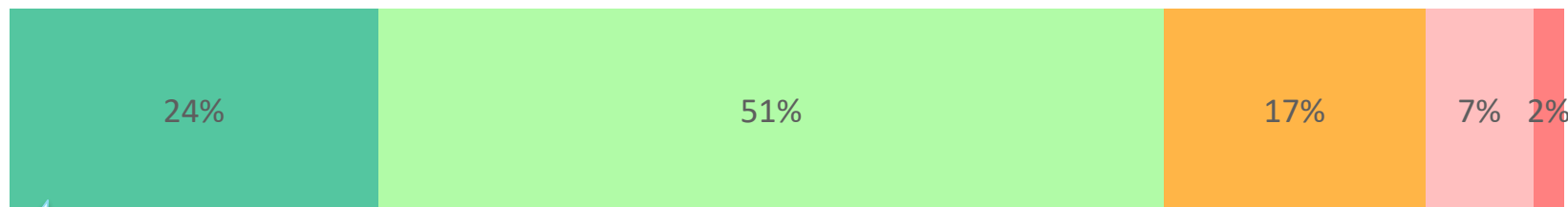
S1. Which country do you live in? / S2a. In which region of England do you live? / S3. Are you... / S4. How old are you? / S5. How much is your total annual household income before taxes?

Base: All respondents using coach (201)

Three quarters using scheduled coach are satisfied with their experience

Satisfaction with scheduled coach travel to an airport

■ Very Satisfied ■ Satisfied ■ Neutral ■ Dissatisfied ■ Very Dissatisfied



"It is a nice way to travel, comfortable and the driving is done for you and no parking to worry about"

"The outward was fine, having been advised to allow time at the airport on return found had to wait several hours as National Express would not transfer ticket to earlier service but would sell me a full price ticket"

"Bus to Heathrow leaves from a convenient location in Newport and arrived on time, and was clean and comfortable."

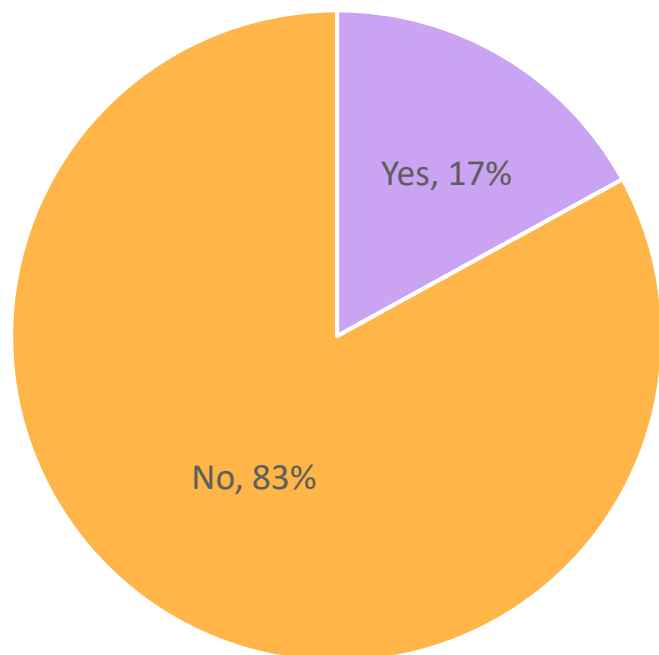
"The airport pick up was on time but had to change due to motorway accident and the connection was very delayed. The onward journey when it arrived was quick and comfortable"

F3. Thinking about when you've travelled to an airport by coach how satisfied were you with you the overall experience? / F4. Why did you give this rating?

Base: All respondents who have used coach to travel to the airport including coach boost (2,574)

The majority of those who have never used coach would not consider using it to travel to the airport

Consider travelling to the airport by coach



"Because I don't like that you don't have the freedom to stop if necessary. Not much room and not comfortable. Pick ups make the journey longer"

"Because I have travelled by coach for a day trip and hated it - it's not comfortable, it goes all around the houses, the journey time was nearly 3 times as long as it takes to drive myself"

"Because I don't know when or where they pick you up and it would be more inconvenient as the train station is at the end of main High street"

"Always been in a situation where I could get the train or we were in a big group and car sharing worked out cheaper"

"As you have to get to the pick up point and then the coach generally takes longer as has lots of stops. Not good when traveling with children and at night time"

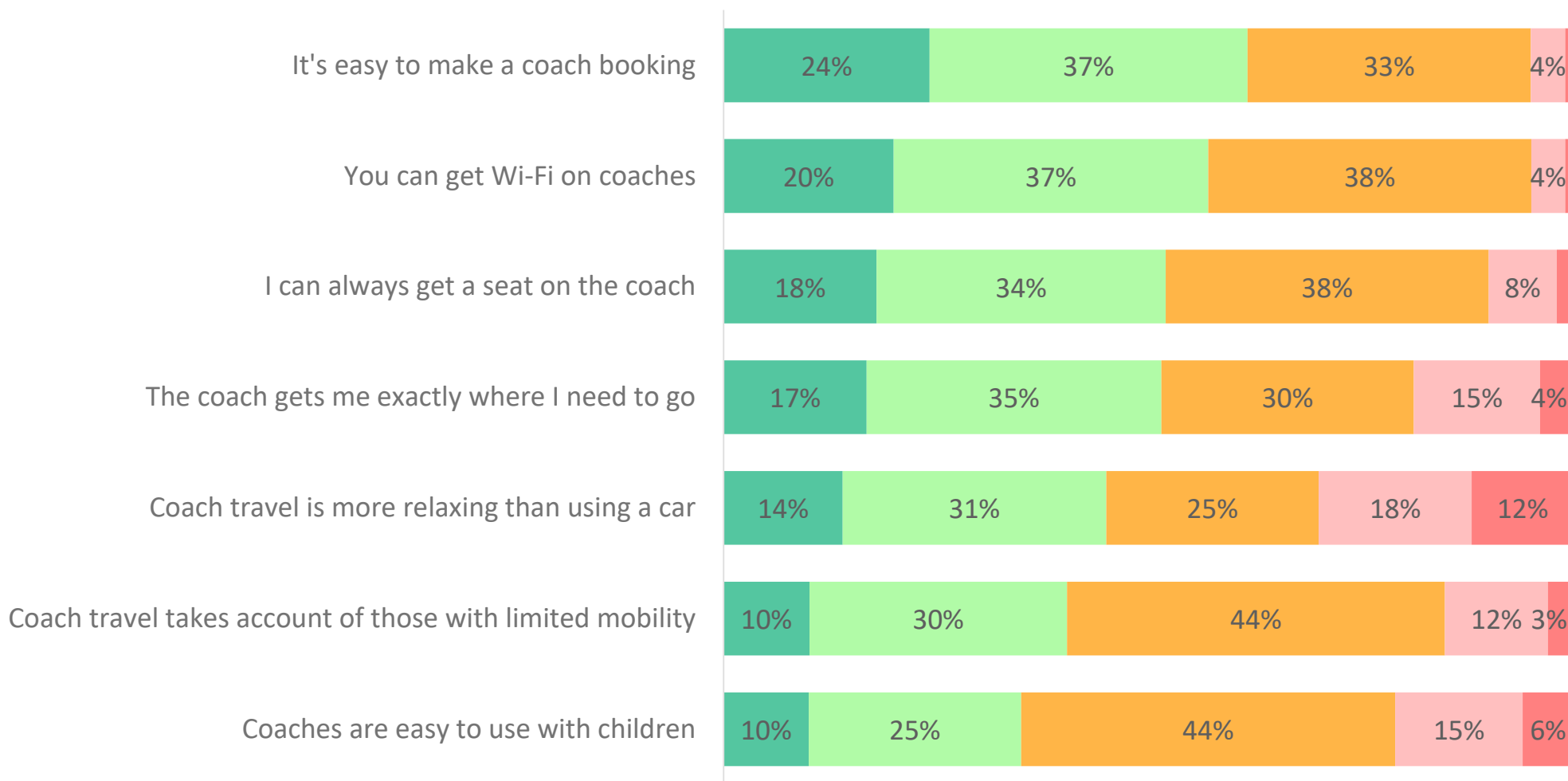
F2b. Have you ever considered travelling to a UK airport by scheduled coach service (please exclude yours)? / F2c. Why do you think you have never travelled to a UK airport by scheduled coach service? Base: All respondents who have never travelled to a UK airport by coach including coach boost (2,686)

The biggest positives about coach travel are that booking is easy, Wi-Fi is available and you are guaranteed a seat



Views on scheduled coach travel

■ Agree strongly
 ■ Agree a little
 ■ Neither
 ■ Disagree Little
 ■ Disagree Strongly



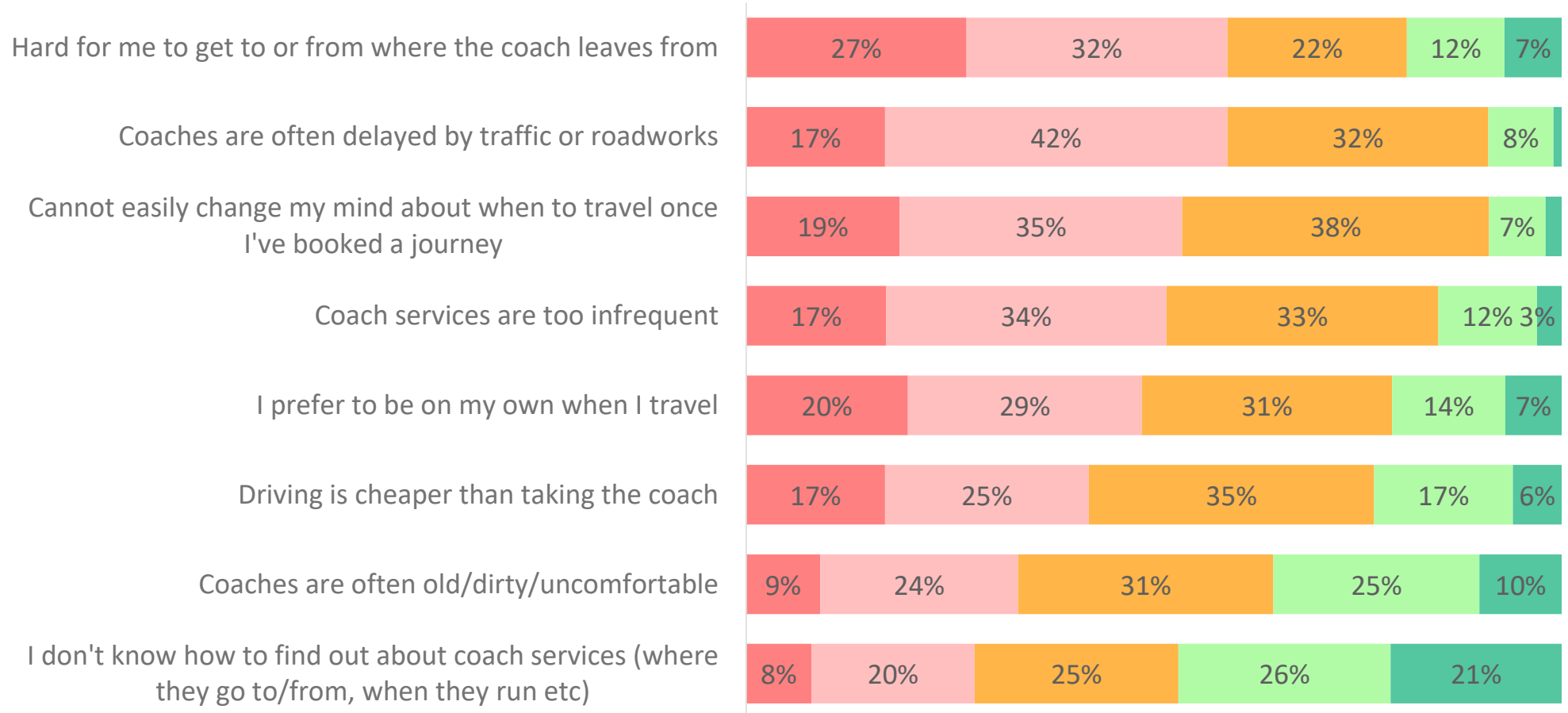
F5. Here are some things other people have said about coach travel. Please indicate how much you agree or disagree with each one. Base: All respondents including coach boost (5,260)

The biggest challenges for coach travel are that it is difficult to get to where the coach leaves from and coaches are often delayed by roadworks



Views on scheduled coach travel

■ Agree strongly
 ■ Agree a little
 ■ Neither
 ■ Disagree Little
 ■ Disagree Strongly



F5. Here are some things other people have said about coach travel. Please indicate how much you agree or disagree with each one. Base: All respondents including coach boost (5,260)

People who would consider coach include those wanting a service that offers value for money and a frequent service

“Real time arrival and traffic info. Also... Flexible service. Frequent departures. Better value for money”

“Very frequent service so I would have to wait no longer than 15 minutes to depart the airport...I would not be happy with stopping in multiple towns en route”

“Very frequent departures and flexible ticketing so I could just turn up and go rather than being restricted to a timed departure”

“Very cheap travel costs and comfortable seating with plenty of legroom. Also a frequent service and flexibility to change your booking to an earlier or later coach with no penalties”

“Good value for money, being cheaper than cost of fuel & parking if using my car. Flexible departure times and not many stops along the journey, that would make it take twice as long as if using the car”

“A certain scheme...which includes frequent coach times via an app, create reward cards for those customers who use the service coach.”

F6. Finally, if a new coach service was introduced from your nearest town to [AIRPORT SELECTED] what would it have to offer for people like you to try it out? Base: All respondents including coach boost (5,260)

Introduction and methodology

Most recent flight

Booking transport to the airport

Travelling to the airport

Importance ratings

Satisfaction with travel

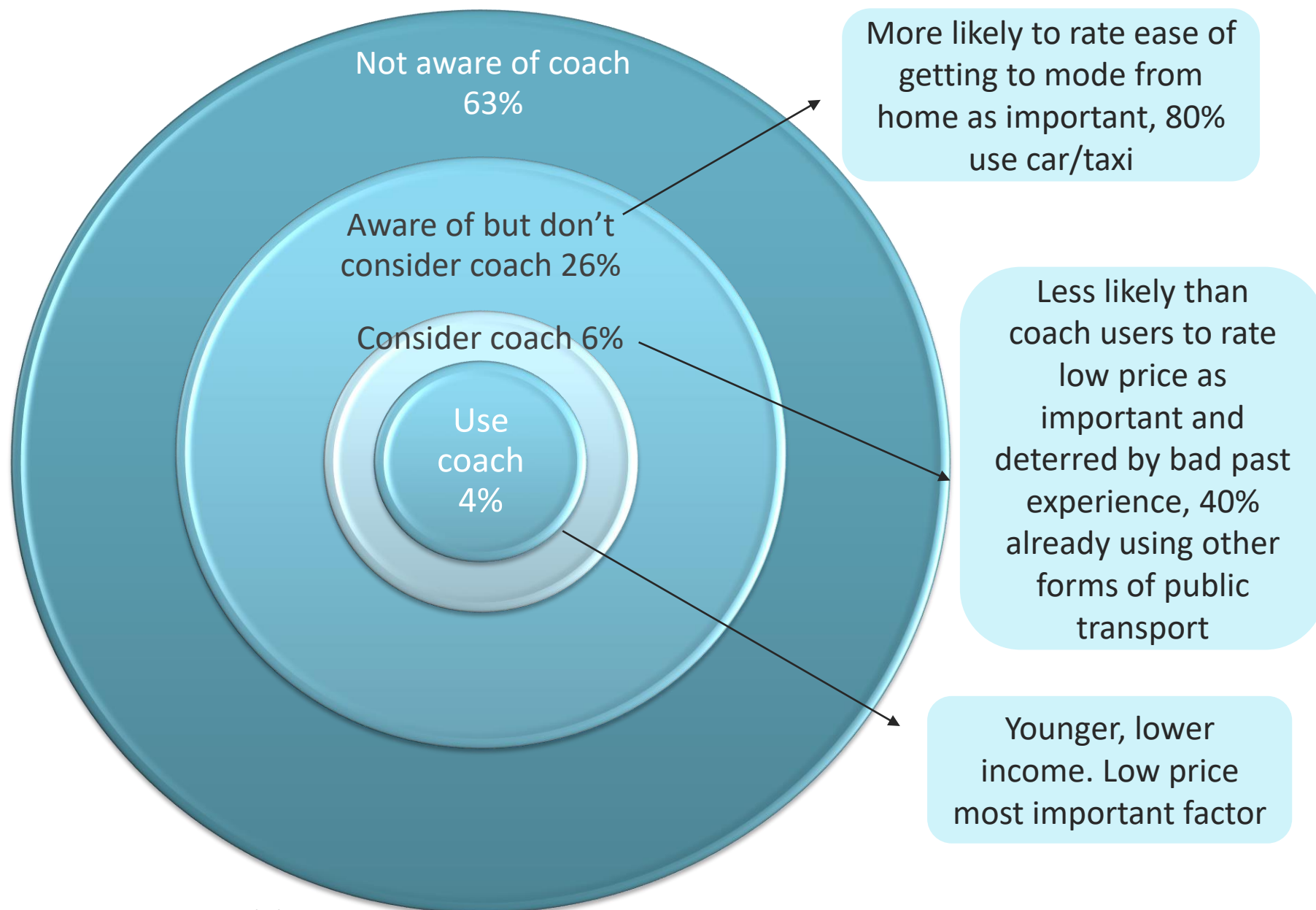
Coach rejecters

Coach travel

Conclusions and recommendations




Coach to the airport – starting from a low base



Coach to the airport – Heathrow has a slightly stronger base

London Airports




53% unaware of coach

32% aware of but don't consider coach

13% consider coach

6% coach users

Non-London Airports




74% unaware of coach

16% aware of but don't consider coach

5% consider coach

1% coach users

Heathrow Airport



56% unaware of coach

30% aware of but don't consider coach

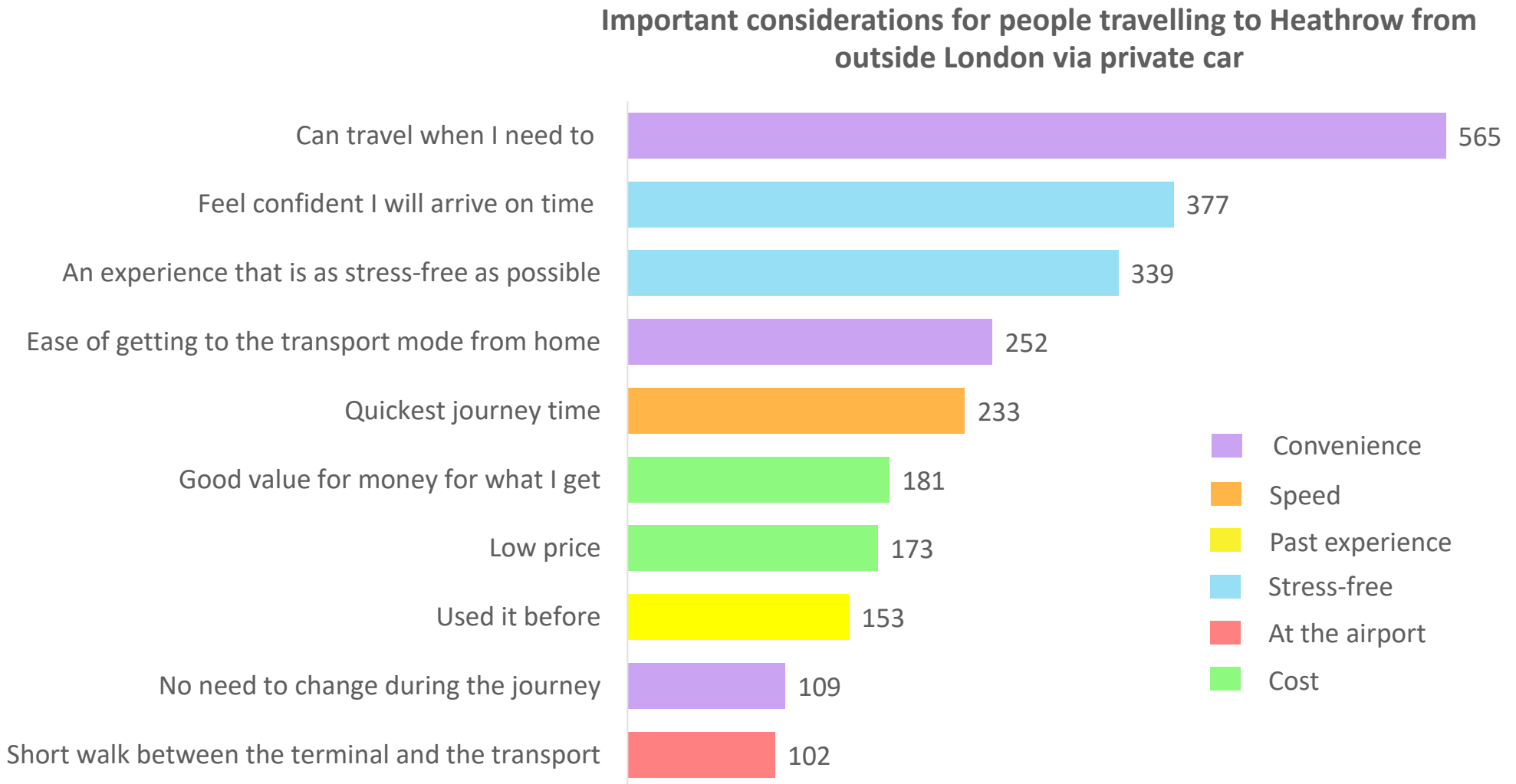
13% consider coach

6% coach users

The challenges posed by increasing coach's share

- Coach is a niche product at present; people who travel by coach are younger than average and have a lower income than most passengers; and they have different priorities to non-coach users
- Coach has a number of key challenges:
 - Low awareness
 - Poor match between the strengths of coach and key priorities of non-coach users
 - Low conversion rate (proportion of those aware who actually use coach)
- In particular frequency / hours of operation is a major problem – the most important factor for the target audience and hard to address for many coach traffic flows due to the volume of potential traffic
- People travelling by coach are less satisfied with punctuality and flexibility in when they can travel
- 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

The key requirement for non-coach users travelling to Heathrow is that they can travel when they need to



D1. You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport. On each screen please select which is most important to you and which is least important. Base: All respondents who are travelling to Heathrow from outside London via private car (522)

Satisfaction with coach is lower on the two most important aspects to passengers



Coach user satisfaction with key aspects

Top 3 aspects

 95%

Personal safety at all stages of the journey

 94%

Ease of planning the journey

 94%

Ease of travelling with luggage

Bottom 3 aspects

 81%

Flexibility in when I could travel

 81%

How quick the journey was

 82%

Punctuality

NB. Total satisfied excluding N/A

E3. Thinking about travelling to the airport by [INSERT MAIN MODE SELECTED AT B2c] how satisfied were you with...?

Base: All respondents using coach as the main mode (196)

Key priorities for encouraging more people to travel by coach



Work on and communicate progress in two key areas – punctuality (consider trading off slower journey times) and frequency / hours of operation



Continue to promote coach travel as a low cost option as this is the main driving factor for current use of coach



Look at and communicate (where possible) locality of pick up points to encourage people who are aware but not considering using coach to switch

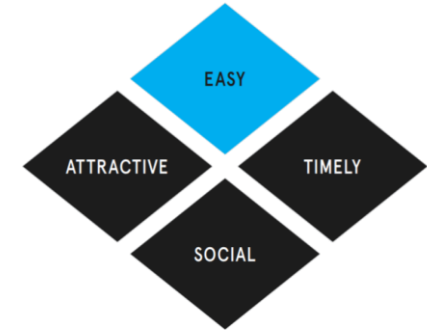


Awareness of coach needs to be raised outside of normal customer touchpoints, since many of the target audience are not researching different modes. It won't be enough to advertise on places where people do research because these aren't being used, instead need to use other means, such as household leaflet drops or advertising in local papers

Use the EAST framework in communications to affect behaviour change

EASY

- Reduce the perceived hassle in using the coach. Consider simple, direct messaging that addresses these friction points, e.g. emphasising the locality of pick-up points, frequency of services, travel early morning / late at night, etc.



ATTRACTIVE

- Issues mentioned include a ‘good’ price, comfort, mod-cons (e.g. toilets, Wi-Fi) and bookable seats – ensure these are stressed in messaging. Consider also using discounts and deals, as these could also act as a compelling incentive.

SOCIAL

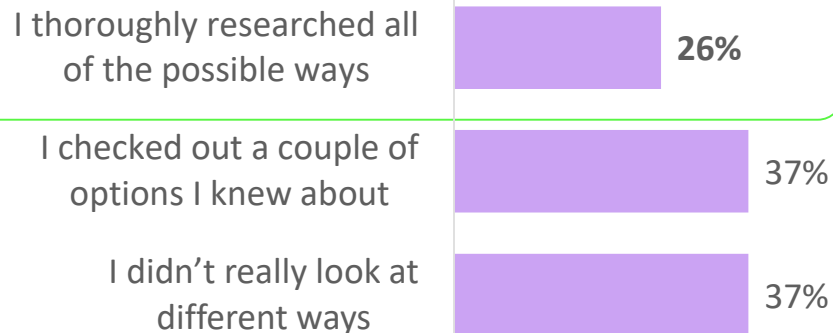
- We are implicitly influenced by what others do. Consider showing that most people adopt a given behaviour. e.g. using messaging like “10,200 people travelled to Heathrow by coach last month.” This could act to make coach travel seem more of a norm.

TIMELY

- People’s priorities can be affected by its context. Target people when they are most likely to be receptive to not using their typical mode of transport, e.g. around train strikes, planned engineering works.

Only a quarter of passengers research all the options

Comparing different transport options



But in response to how aware they were of the transport options, **59%** said 'I knew all the different options'!

What might play a role in this discrepancy?

The Rule of Thumb Heuristic

There is **too much information** in our environment for us to actively calculate all possible options to every scenario, so instead we often **operate using** mental shortcuts or 'heuristics', which are **rough approximations** based on pre-existing knowledge, intuition as well as guesswork.

These approximations can cover things like the **time** we expect a journey to take and the **costs** we anticipate may be associated with it etc., and they can be **based on numerous factors** such a **similar trips** previously completed, hearing a **friend** talk about a similar journey, knowing the **rough distances** involved and so on. These rules of thumb may be reasonably accurate or wildly wrong and are an **instinctive system 1 based response**.

When **asked if they know all the options** people are likely answering on a **rule of thumb** basis, when asked if they **'thoroughly researched all the options'** they are more likely to be responding based on an account of their **physical behaviours**.

"It never occurred to me as I always go by car"

"Reason one is, I have family members to take me/us to the Airport. I have own vehicles at home"

"There isn't a coach stop to Heathrow near me, and I usually need to travel during the evening rush hour and think road traffic will take too long and arrival on time is unpredictable."

"Too many real or imaginary chances of delay"

C1. Did you choose how to get to the airport? Base: All respondents (5,009)

C3. To what extent did you compare different ways of getting to the airport? Base: All respondents solely responsible for choosing how to get to the airport (2,431)

Discrepancy between stated preference and max-diff

The phrasing of question B2ba encourages a quick, instinctive response more likely to be rooted in **System 1** thinking:

Why did you choose this/these modes of travel?

Responses here may be more '**top of mind**', rather than systematically deliberated over and calculated.



As an exercise, MaxDiff directly taps into **System 2** responses by asking respondents to evaluate the (relative) importance of different aspects against each other. This process, of trading one thing off against another, marking one as more important and another less important, encourages respondents to reflect at a deeper level, eliciting more '**rationalised**' **System 2** responses which are designed to encourage a deeper level of consideration.

You will now be shown a series of screens with a selection of different things you might consider when choosing how to get to/from an airport.

Answers here indicate relative importance.

These questions are asking slightly different things to the same people, the second question is more nuanced and is likely to elicit marginally different answers.

It's not a case that one approach is 'more' correct than the other!

When we explore these questions in depth, both **convenience** and **time** come out on top demonstrating consistency in sentiment between them.