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Enlighten. Empower.

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

Prepared for Transport Focus

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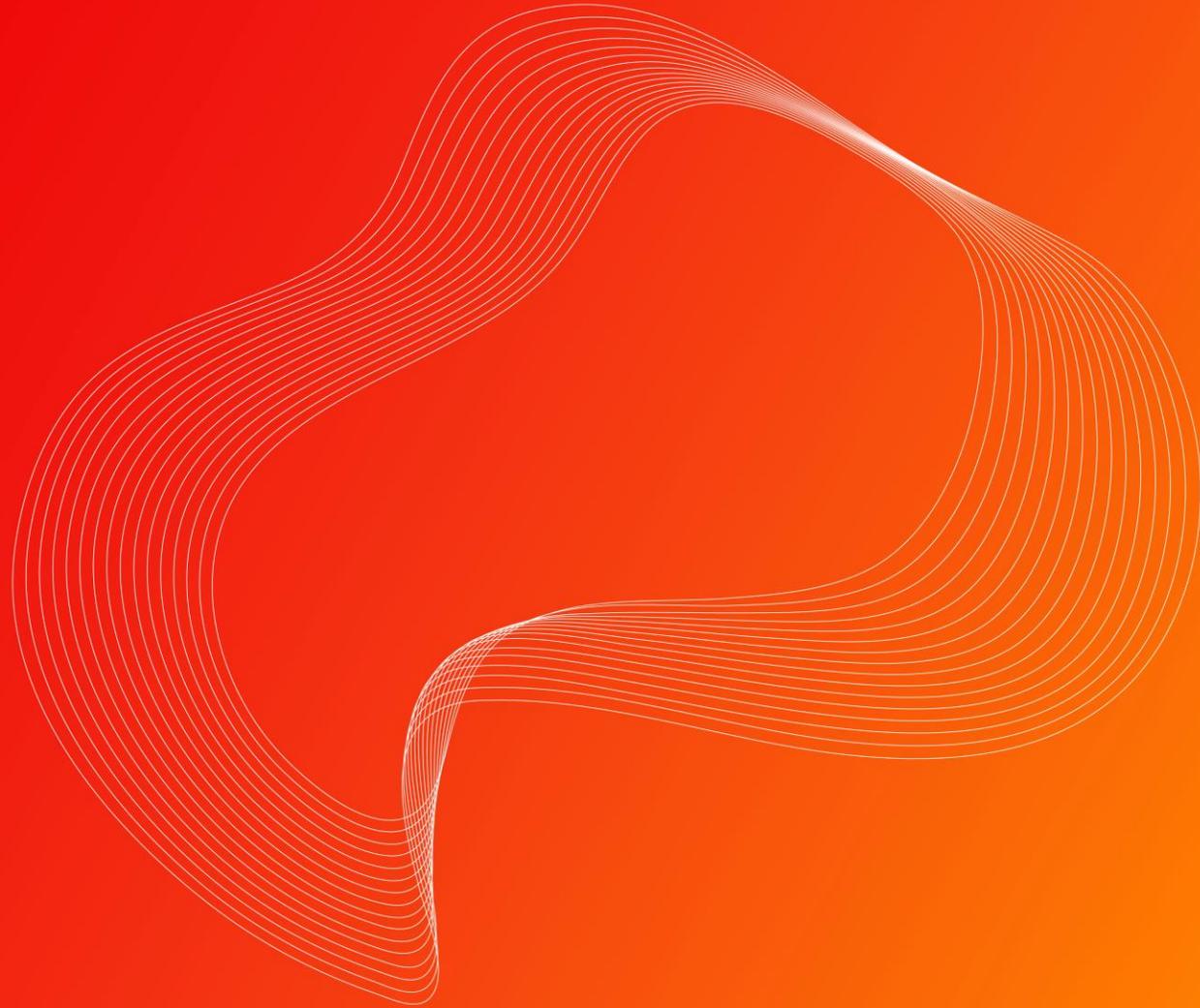
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Background and method

The need for research

Transport Focus has been turning its attention to **surface transport to airports**. These journeys

- are often **stressful**
- typically involve a significant amount of **pre-planning**
- usually offer a range of **modal choices**

The government wants to **increase the numbers using public transport for getting to and from airports**. (Airports are also major interchanges for coach passengers when making journeys within the UK).

There are also over **25 million journeys** on scheduled coach operations each year in the UK

Transport Focus in partnership with the Department for Transport and Heathrow Airport has commissioned a programme of qualitative research to look at two issues:

- With regards to airports: 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**

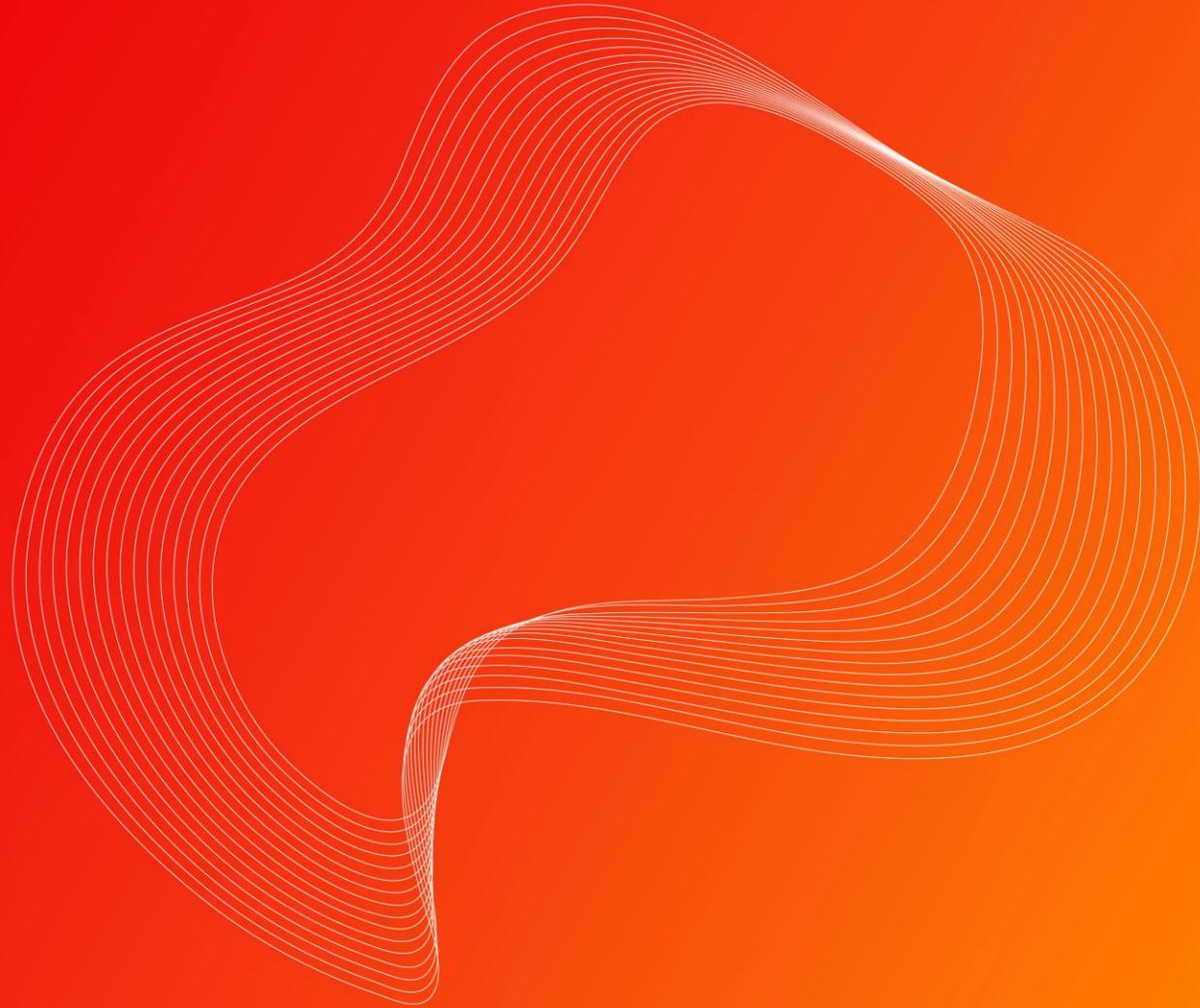


Our approach to the question of airport surface access...

METHOD	AUDIENCE
16 Focus Groups 	<ul style="list-style-type: none">- A range of passengers that have had or will make journeys to different airports across the UK
In-depth interviews 	<ul style="list-style-type: none">- Vulnerable passengers
Ethnographic diary exercise 	<ul style="list-style-type: none">- Passengers that will be making a journey throughout the fieldwork period
Intercept at airports 	<ul style="list-style-type: none">- Passengers on a journey to or from the airport (including those not flying but using the airport as an interchange)

Our approach to understanding coach travel more generally...

METHOD	AUDIENCE
6 Focus Groups 	<ul style="list-style-type: none">- An array of passengers that use coach travel in different locations around the UK for either leisure or commuting purposes- Some who use airport as an interchange even if not flying
6 In-depth interviews 	<ul style="list-style-type: none">- Vulnerable passengers: those with disabilities, those with young children, those with lower income and elderly passengers
Task non-coach passengers to take a coach journey 	<ul style="list-style-type: none">- Passengers who do not use the coach to travel who were asked to take a journey they would ordinarily make via other means
<i>Including online reporting and a follow up interview</i>	
Intercepts at coach stations 	<ul style="list-style-type: none">- Passengers who have just taken coach journeys



Executive summary

Executive summary

The journey to the airport is seen as a high-pressure situation – passengers travel by modes they trust, and are often habit-driven in their choices

- Convincing passengers to ‘take a chance’ on coach travel will, therefore, be challenging

However, all modes of transport to the airport have their perceived disadvantages, many of which the coach is seen to address

- A key question for the quantitative research will be: What (if any) disadvantages are *burdensome enough* to encourage passengers to switch mode?

First-time coach users are frequently struck by how pleasant and easy coach travel is

- The main challenge for coach companies is to get non-users onto the coach for the first time. The experience may well be enough to entice passengers back for further trips

Modal choice likely varies by passenger location, airport location, whether disabled or not, income and family status, among many others

- There are a wide range of potentially salient variables for a quantitative project to analyse
- Different types of passenger have different needs, many of which are felt to be addressed by coach travel

Awareness of coach travel is remarkably low

- 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
- Regular users of coaches do not report any confusion with the coach system. There may be some value in bringing non-users ‘up to speed’ with what exactly the coach offering is in the UK and how it operates

There is a great deal of myth-busting to be done around coach travel in the UK

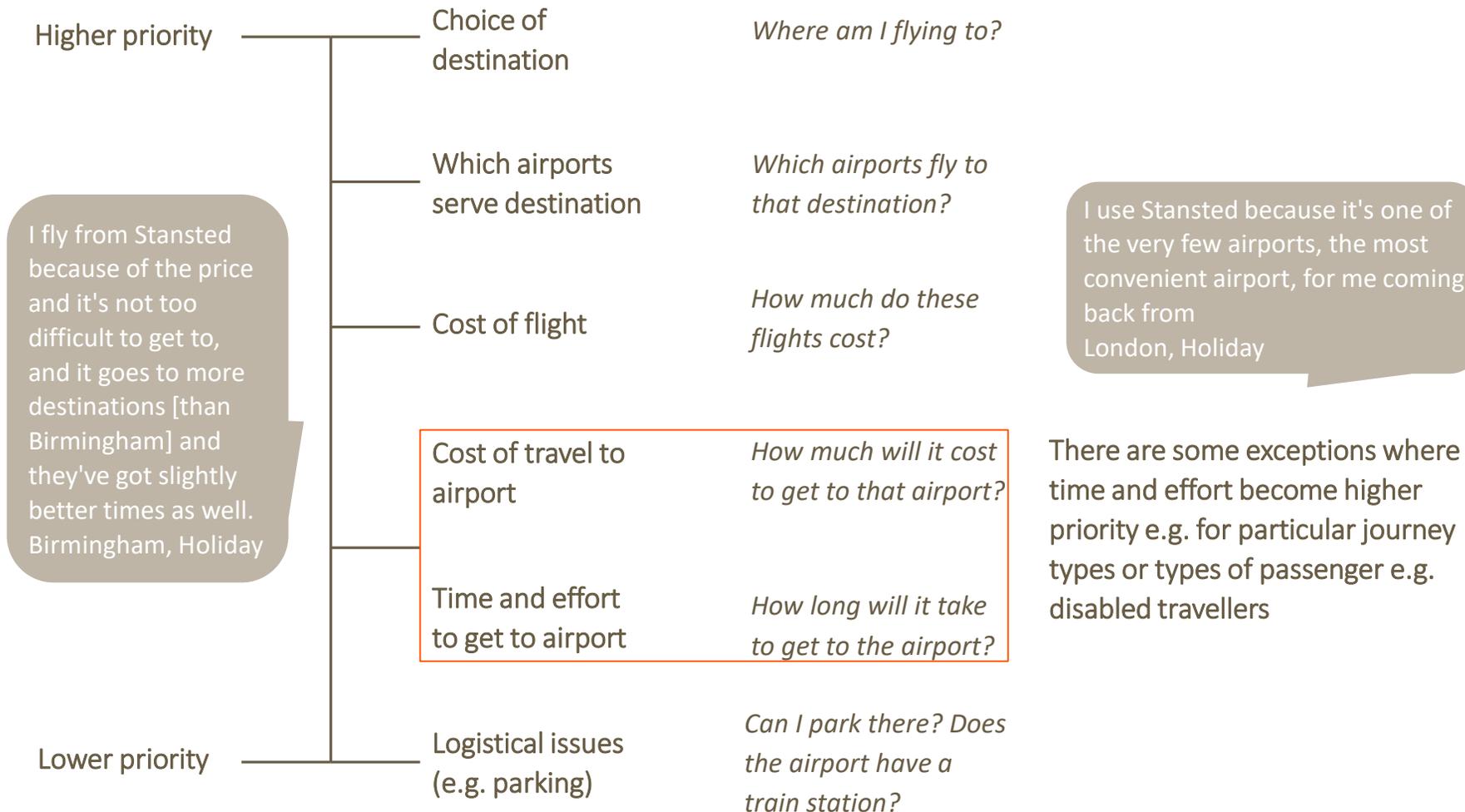
- Even if they are aware of coach offerings, passengers have imagined horror stories about cramped conditions, drunk passengers and long-haul travel
- Passengers may benefit from hearing that they can reach to their destination **cheaply, reliably and peacefully** by coach



What
determines
peoples' choice
of airport?

Many factors are considered when deciding which airport to use, but there is a common framework for decision-making

Consumers intuitively run through a hierarchy of considerations when making a trip abroad, and ask a series of questions along the way



Passengers' destinations are usually decided before considering which airport they use

Leisure passengers usually choose a destination before browsing airport options

Occasionally passengers will select a destination first, simply based on what is available cheaply from a local airport

- For short leisure trips/ 'city breaks'
- Passengers can also be suggested holiday deals and packages, and in this case an airport can be selected for them

Passengers may *have* to fly from certain larger airports to make long haul journeys (e.g. Heathrow)

Once destination decided upon the next step is to establish which airports serve that destination...

London travellers feel comfortable assuming at least one London airport will be available

So if I'm flying Europe, it will be Luton or Stansted as the main ones, but then long haul would almost certainly be from Heathrow.
London, Business

Heathrow don't do short haul pretty much. You have to go to Heathrow for long haul
London, Holiday



Planning air travel is a primarily digital process; reflecting (and possibly driving) consumers' choices

The vast majority of passengers search for flights using the internet

One or more comparison sites are typically used to find cheapest flights...



...and / or go directly to airline websites



A very small number phone airlines or use travel agents for flights

I book flights through Skyscanner, so I'll select it from a favourite airport first and see if the flights are there but then, you don't really end up having much choice
London, Holiday

The information is a lot more available now because of the internet and the websites.
London, Holiday

Price tends to be the default

The screenshot shows two flight options side-by-side. The top option is an easyJet flight from LGW to MAD, departing at 07:25 and arriving at 11:00, with a duration of 2h 35. The bottom option is a Ryanair flight from MAD to STN, departing at 06:15 and arriving at 07:45, with a duration of 2h 30. To the right of these options, a large green circle highlights the price £65, with a 'Select →' button below it. Below the button, it says '2 bookings required'.

Information hierarchy on aggregator and individual airline sites tends to emphasise price and time of flight over airport

Generally with airports look on Skyscanner, search for the whole of UK and then go down. If East Midlands is the cheapest, I'll go for that
Nottingham, Holiday

Information provided regarding travel to the airport (e.g. parking) whilst booking is seldom noticed by passengers

When choosing which airport to fly from, the cost of the flight tends to be the priority

Passengers typically focus far more on the cost of the flight than the cost/ effort of getting to the airport *at the time of booking*

Tendency to focus on the 'here & now' and what is perceived as the 'big ticket' item (i.e. air fare)

Decisions are often habitual

- 'Always' fly from one airport and reluctant to consider others
- Regular trips (e.g. to visit family)
 - May reflect consistently **cheaper prices** from a certain airport, but passengers may default to a particular journey as long as prices not significantly different
- More **frequent/ experienced passengers** will intuitively factor-in mode and cost of getting to the airport at time of booking flight

But many only consider non-flight costs later...

- Can leave passengers feeling frustrated with costs and effort involved

For some passenger types, cost/ effort of getting to the airport is higher salience

Passengers more remote from major airports (e.g. Newcastle) more likely to consider the whole cost/ effort of the journey

There are certain things like, is it easy to get the skis to the airport, but it really just depends on price
Nottingham, Holiday

I got the flight from London right. But stupid me, didn't even think that getting down to London would actually be more than the flight!
Newcastle, Holiday

I mean it's price, if it's the same price to go to from Gatwick or Stansted then you think about other things
Norwich, Holiday



Where there is a perceived choice of airports, time and costs of getting to the airport come into play

Passengers will naturally usually look for airports in their region

If price is reasonable and the airport serves destination, choice is obvious

The decision is often intuitive

- Passengers may instinctively know that an airport is too far for them to travel (e.g. a London airport for those living in the North)
- The exception to this is especially cheap deals

Every time I consider my holiday options, they are often based around flying from a local airport, sometimes I've based it around Norwich
Norwich, Holiday

Where there is greater perceived choice many passengers weigh-up...

The distance needed to travel with cost of travel

- *Should I have a more strenuous and less convenient journey to the airport but save money?*
- *Or should I spend more money than is necessary and enjoy a short trip to the airport?*

So if a flight from like East Midlands is £30 more expensive than a flight from like, I don't know, Newcastle, then obviously you'd go from there, so for money and time.
Birmingham, Holiday

And there are exceptions, where passengers will prioritise other factors over cost

Where time and effort involved in getting to and from the airport can be a higher priority than cost:

- Business trips – 'not my money'
- Special occasions (e.g. honeymoon) – journey experience more important than cost
- More affluent passengers

If the airport is logistically inaccessible e.g.

- No direct rail route
- Inaccessible for disabled people

But rarely will a passenger will choose a more expensive flight to take their favoured mode of transport to the airport

Practical challenges at airports are not always thought about until shortly before departure

Passengers identify various practical challenges at different airports, including:

- Lack of, or perceived expensive, parking
- No train station
- Difficulty navigating to/ within airport

Frequent travellers often aware of specific airport 'idiosyncrasies' e.g. parking costs

- Can sometimes impact decision on airport choice *at the margins*

Parking can be a bit far from the actual terminal I find, so sometimes I get the meet and greet
Birmingham, Holiday

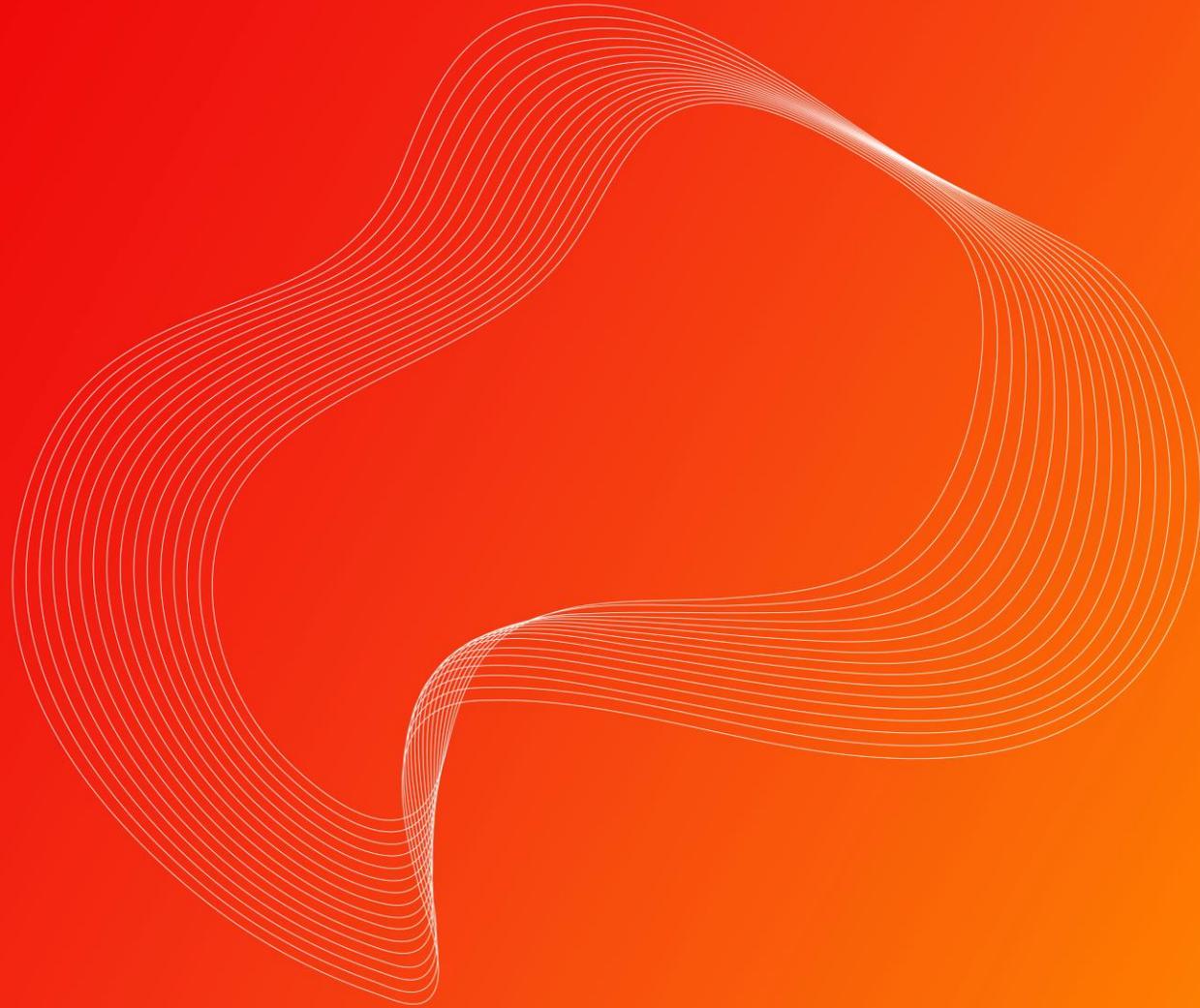
But while practical difficulties can be challenging, they are not typically top of mind

- If not used airport before, typically unaware of any potential problems

Most passengers do not consider these issues when booking tickets and choosing which airport to fly from

However, these can be a more serious concern for disabled passengers (see later)





Modal choice /
decision making
process



Choice framework

Modal choice partly reflects preferences, but there are a range of external factors that are often prerequisites to this choice



Geographical start point

- Where a traveller starts from often determines their route
- Some modes of transport are simply not available or feasible



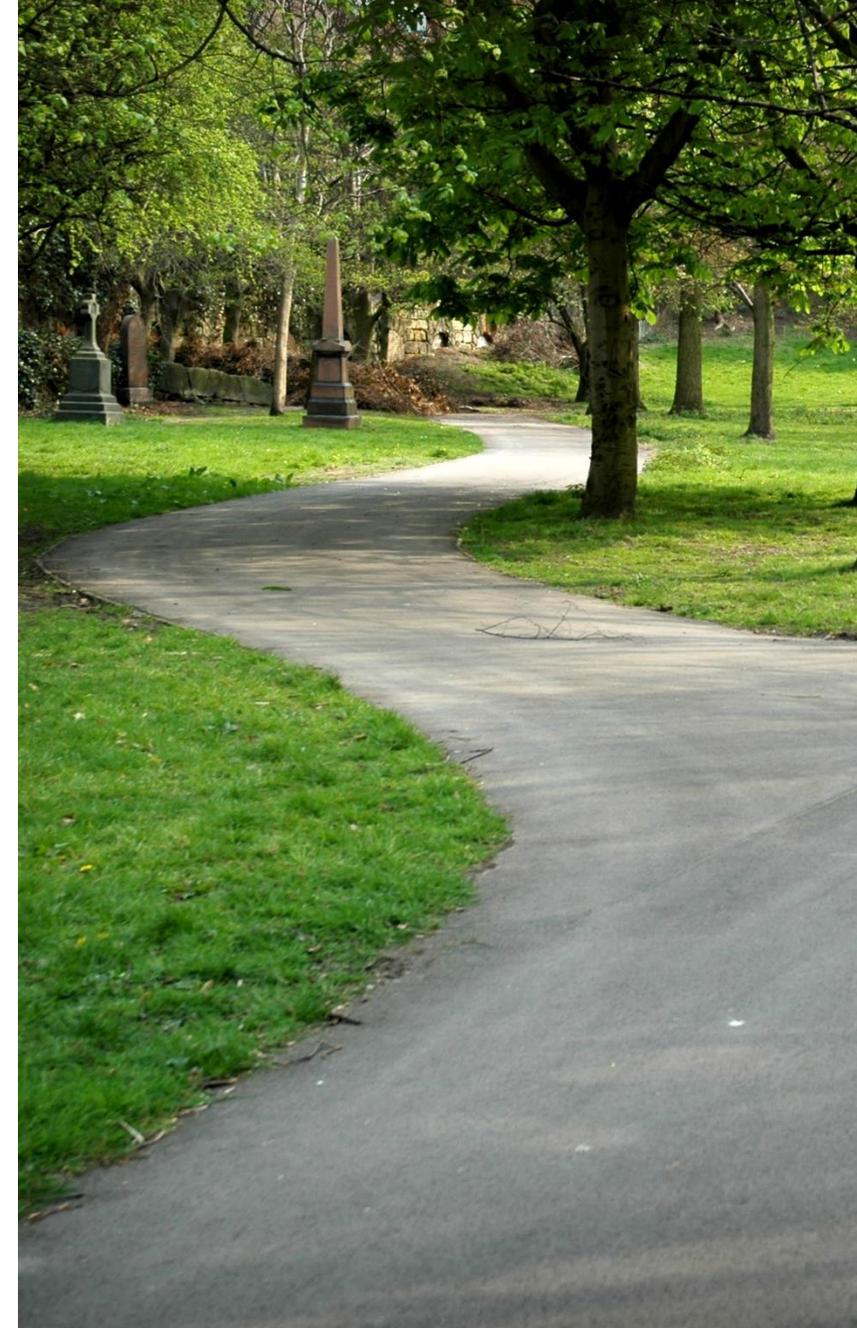
Special occasions

- Certain occasions will determine what mode of transport a traveller or travellers get
- For example, if travelling for a honeymoon, a couple are likely to spend more money on greater comfort and privacy



The difference between travelling to and from the airport

- Travellers are often in a very different head space when travelling to and from the airport
- The emotional and energy level associations of these journeys are different



Modal choice is in part a function of location: further away from urban centres, there is more limited perceived choice

Urban Areas

- Widest perceived public/ private transport choice
- Public transport in urban areas (esp. London) may often be quicker, cheaper and easier than driving or taxi
- Time and effort *to get to* public transport hubs can also be a factor (e.g. walking to tube with luggage may be problematic)

Suburban Areas

- Journey to the airport often requires more than one mode *unless* driving or taxi
- Can mitigate in favour of private transport

Areas not served/ little served by public transport

- Again journey to the airport often requires more than one mode unless driving or taxi
- In rural/ remote areas journey to public transport hub may necessitate use of private transport
- As such, often default to private transport for entire journey

I live in a rural area, with almost no buses, and infrequent trains. Getting to and from public transport stations would still mean having to use a taxi or get a lift from family
Warwickshire, Ethnography

[staying overnight in a hotel] allowed us a stress free journey to Heathrow this morning (where as we'd have left at 6am otherwise)
West Midlands, Ethnography

Taxis just drop you outside your door, and you haven't all got to cram into a car and stress.
Birmingham, Holiday



Long distance travellers may opt for an overnight stay pre-flight to avoid risks inherent in lengthy trip to the airport



Special occasions can be an override

For passengers travelling as part of a *special occasion*, the journey to the airport can be seen as part of the holiday

Passengers may choose a 'special' mode of transport that either is rarely used or is associated with luxury or decadence e.g.

- Train journey sitting at a table with refreshments and beverages
- Hiring a minibus with a large group of friends and family
- Limo

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
Newcastle, Holiday

Taxis just drop you outside your door, and you haven't all got to cram into a car and stress.
Birmingham, Holiday



Passengers often feel they have more choice going **from** the airport than **to** the airport

Passengers may take a cheaper mode of transport home to offset an expensive journey to the airport

- Some feel that journey to the airport is a high-stakes trip, requiring a more 'reliable' mode like train or taxi so they don't miss their flight
- Others felt compelled to take an 'expensive' mode due to their departure time
- The journey home has less risk and may be an opportunity to save money

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
Stansted, Intercept

Others may feel that after the exhaustion of a long plane journey, they need a more comfortable journey for the final stretch

- May spend more money on modes such as taxi or train

We're waiting for a local bus now: it's the afternoon now, we have time. The weather's good...We're all rested, and it's not 3:30 in the morning
Stansted, Intercept





Analysis by mode

Passengers' main objective is to travel to the airport with **low stress** at an **acceptable cost**, but no mode offers this service

When considering which mode to take, passengers have a range of criteria that is important to them (*based on a combination of actual experience and perceptions*)

Availability

- The extent to which the mode is available to the passenger
- Passengers also consider 24 hour availability

Reliability

- Important for reducing stress and providing passenger confidence that they will arrive on time

Comfort

- How much the passenger will enjoy the journey

Convenience

- Time and effort that is required to make the journey

Value/affordability

- Whether passengers see the option as viable for their budget

		Modal choice					
		Coach	Car	Taxi	Train	Getting a lift	The tube
Criteria	Availability	✓ ?	✓ ?	✓ ✓	✗	✗	✗
	Reliability	✗	✓ ?	✓ ?	✓ ?	✓	✓
	Comfort	✗	✓ ?	✓ ✓	✓	✓ ✓	✗
	Convenience	✗	✓	✓ ✓	✓	✓ ✓	✓
	Value/affordability	✓ ✓	✓ ?	✗	✗	✓ ✓	✓ ✓

Travelling to the airport can be an emotive experience and this impacts choice

 Passengers are often happy to be on holiday...

 As well as excited (particularly children)

However, these emotions are often conflicted with anxiety and difficult situations

 Passengers can become cross if journeys do not go to plan

 Delays can cause nasty surprises and shocks

 The pressure of sticking to a time can cause passengers to be irritable and stressed

There can also be some conflict within a group travelling together as to what the best mode is

Anticipating and dealing with these emotions can have an impact on modal choice. Passengers have emotional associations with different modes of transport.

Concerns are what happens if I miss my flight?
Worse yet what happens if I miss my flight cause the tube is stuck or the train delayed?
London, Ethnography

Passengers often disclose the need to manage their emotions when travelling to the airport, and have various strategies of doing so:

- Planning
- Socialising
- Travelling with others
- Drinking
- Bringing entertainment for the children

With all this in mind, the atmosphere on public transport heading to the airport can be an emotive one

- A mixture of excitement, frustration, anxiety and stress can make these journeys different to others

The children were generally occupied on their phones for most of the journey while the adults all quietly panicked!
Kent, Ethnography



Car is often the go to option for passengers that are travelling as a family and / or want to travel autonomously

Assumed **benefits** of travelling by car to the airport

- Self-reliance: many see the car as 'their bubble', and this 'safe zone' can feel helpful in stressful times
- Often seen as more cost-effective than public transport (esp. if in a group)
- Practicality of carrying luggage/ transporting children
- Flexibility of being able to change route depending on traffic
- Often seen as more cost-effective than public transport (esp. if in a group)
- Getting a lift with family/ friends provides all the benefits with little/ no cost

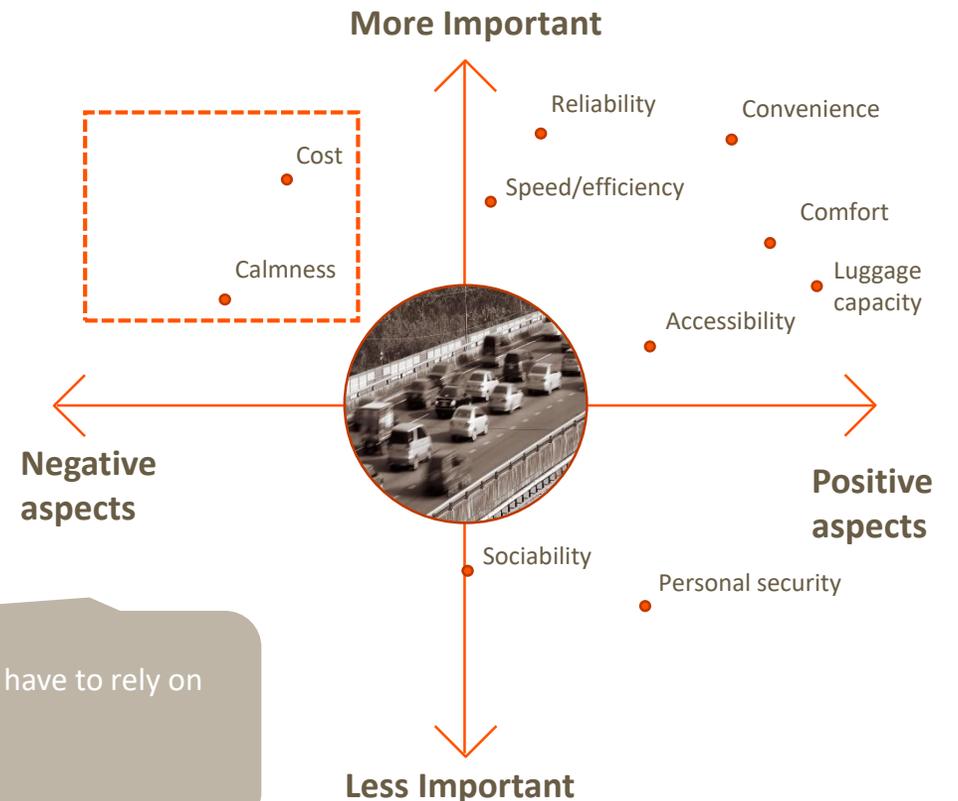
Assumed **drawbacks** of travelling by car to the airport

- Stressful if any unanticipated issues (e.g. traffic jams)
- Many do not want the 'chore' of driving to the airport and/ or do not want to drive if tired/stressed after return flight
- Leaving car at airport often seen as expensive
- Those relying on a lift do not always like to ask family/friends

Concerns are what happens if I miss my flight?
Worse yet what happens if I miss my flight cause the tube is stuck or the train delayed?
London, Ethnography

I'm comfortable in the car and glad I don't have to rely on taxis and public transport
Warwickshire, Ethnography

Positive and negative aspects of car travel, with their relative importance:



Passengers that want a fast and sociable journey with the option to relax are likely to choose the **train**

Assumed **benefits** of travelling by train *to the airport*

- Speed and efficiency of travel allows for extra time at home
- Can sit down and relax
- Can be a social environment for passengers in a group

Assumed **drawbacks** of travelling by train *to the airport*

- Potential hassle of getting to the station, especially if with luggage, children and / or if need to make an interchange
- Often seen as too expensive, especially if making longer trips and/ or for group travel
- Not door-to-door
- Interchanges in London can be challenging for many, particularly if they are not used to the tube network
- Ticketing can be confusing
- Airports often not accessible on mainlines, meaning complicated routes and interchanges

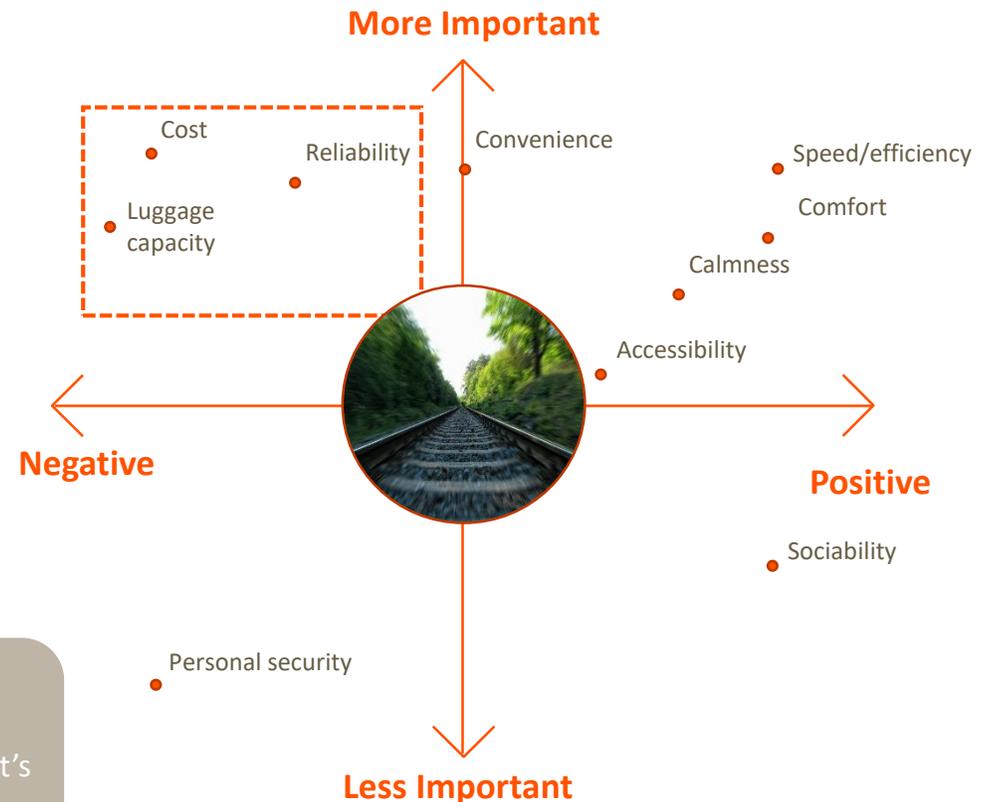
Heathrow Express epitomised the pros and cons of train travel

- Very expensive but very quick

On the train it's just like ridiculous and they don't discount the price on the train. You can get the Megabus for a fiver basically.
Norwich, Holiday

The train is easier than driving and it's actually comfier, but like I said, it's just the cost of doing it.
Birmingham, Holiday

Positive and negative aspects of train travel, and their relative importance:



When travelling to Heathrow, passengers often prefer to take the **tube** if they are from London

Assumed **benefits** of travelling by tube *to the airport*

- Seen as affordable, efficient and reliable
- Passengers from London are used to this mode
- Ticketing is simple

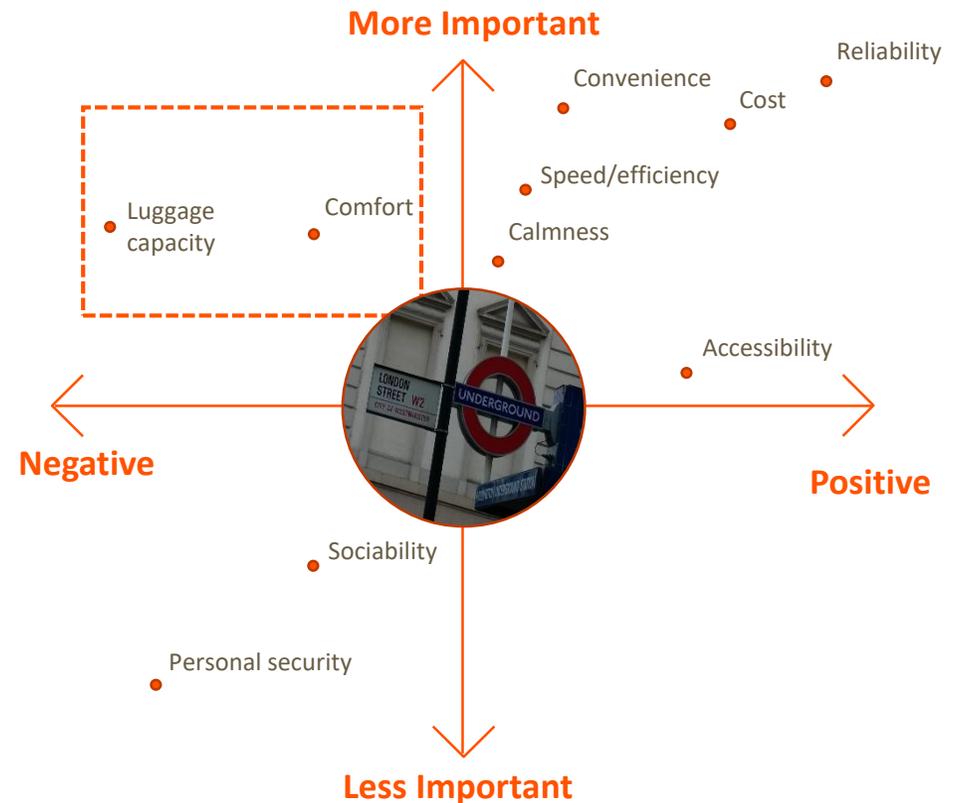
I've got a five year old girl. So I'll pop her in the car rather than drag her round tubes and trains and that.
London, Holiday

Assumed **drawbacks** of travelling by tube *to the airport*

- A London-centric preference: many from outside of London aim to avoid the Tube as it can be seen as confusing and stressful
- Difficult with large amounts of luggage items
- Rush hour uncomfortable Ticketing can be confusing for non-Londoners
- A long journey for the Tube and particularly in comparison to Heathrow Express

I'd rather have my own little space than be packed into a tube, plus getting to the airport for five or six in the morning. Not sure I can rely on the tube at that time.
London, Business

Positive and negative aspects of Tube travel, and their relative importance:



If the airport is close enough for the **taxi** to be affordable, this option offers high levels of convenience

Assumed **benefits** of travelling by taxi *to the airport*

- Easiest way to get to the airport, if within an *affordable* distance
- Can be good value if cost is shared amongst a group
- Reliable: many book with local taxi they have used before
- Luggage capacity
- Available all hours
- Door-to-door
- Those travelling (mostly from London) are used to using the *Uber* app

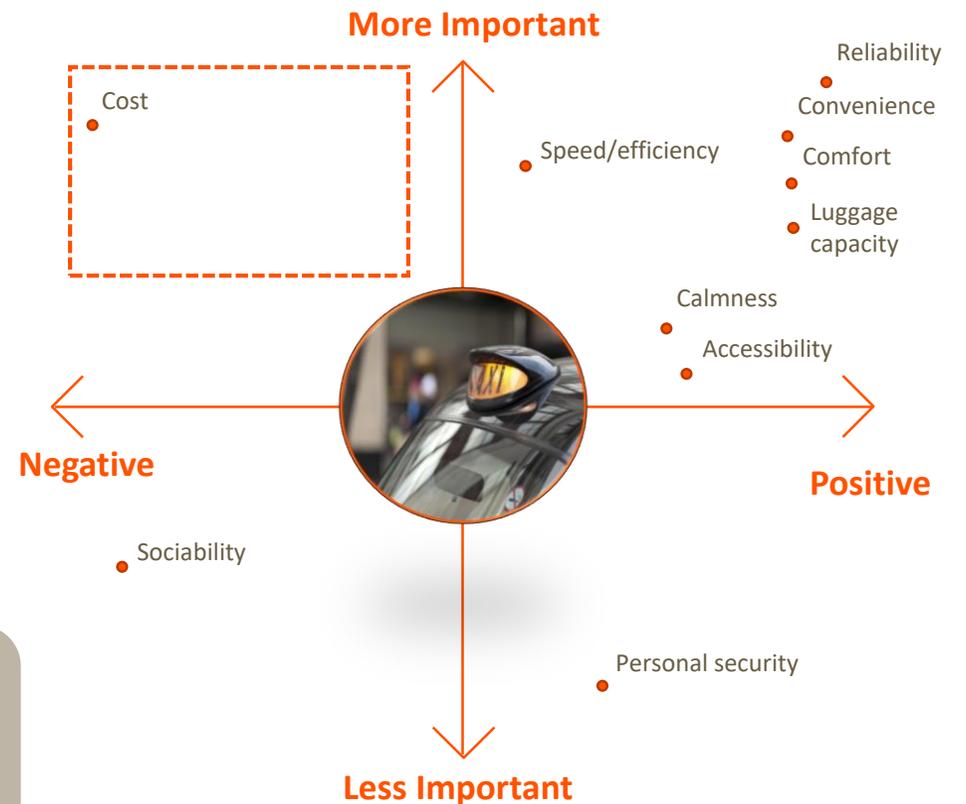
Assumed **drawbacks** of travelling by taxi *to the airport*

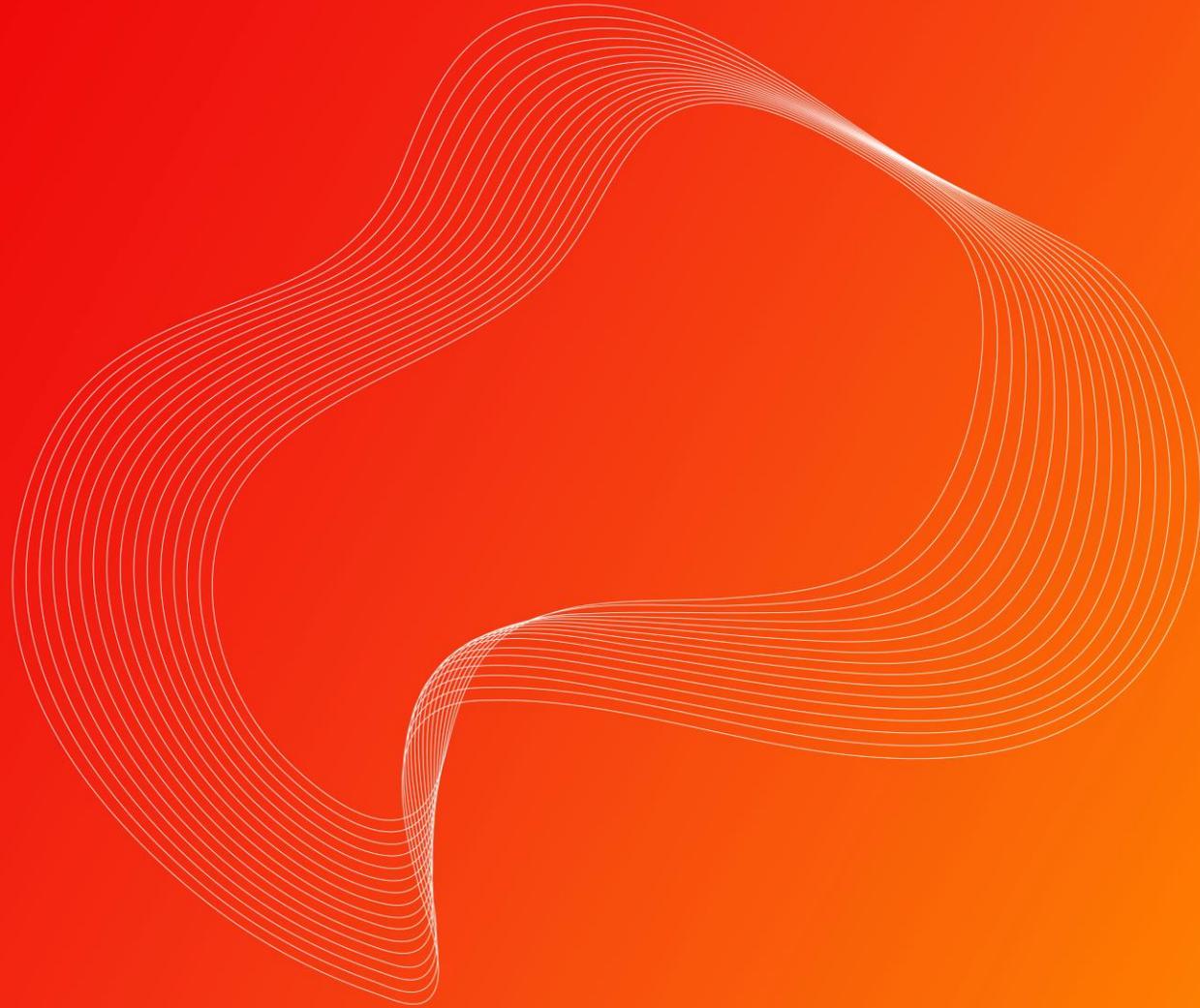
- For some, rules out as unaffordable
- And longer distances (50 mile +) increase cost disadvantages and mitigate against reliability advantages
- If travelling with a large group, the social aspect of getting a train or a mini-bus is lost
- Concerns about traffic/ delays can cause anxiety

[a taxi is] door to door, a comfy ride provided by our taxi company of choice
Derby, Ethnography

[the taxi company] were very efficient ...
[they knew] the best route to take to ensure that we got to the airport on time
Bedfordshire, Ethnography

Positive and negative aspects of using a taxi, and their relative importance:





Analysis by region

Regional Information

Closest airport: Liverpool John Lennon
Local coach offering: 500 Airport Flyer Bus Service serving Liverpool City Centre to the airport
Key motorways: M62, M57
Relevant train stations: Liverpool Lime Street Station Manchester airport station

Closest airport: Birmingham
Local coach offering: Lots of warmth towards Birmingham National Express' newly refurbished coach station. Serves Heathrow, Gatwick, Stansted and Birmingham Airport
Key motorways: M6
Relevant train stations: Birmingham

Closest airport: Bristol, often perceived as expensive
Local coach offering: Bristol Flyer from city to Bristol airport; National Express and Megabus to all airports
Local bus service is often described as unreliable which can influence decision to use bus/coach to the airport if public transport is required to get to/from bus/coach station
Relevant train stations: Bristol Temple Meads/ Bristol parkway are seen as very expensive, with little (if any) benefit over coaches
Key motorways: M4/M25 and M5



Nottingham
Closest airport: East Midlands
Local coach offering: Nottingham Skylink serving Nottingham central to East Midlands Airport (low usage)
Key motorways: M1, M42, A1(M)
Relevant train stations: Birmingham International, Luton Airport Parkway, Stansted Airport

Norwich
Closest airport: Norwich airport
Local coach offering: to Gatwick, Heathrow, Stansted
No motorways
Relevant train station: Norwich

London
Airports in the region considered: Heathrow, Gatwick, Stansted, City Airport, Luton & Southend
Bus services aware of: National Express, Megabus, easyBus
Key motorways: M25, M1, M4, North Circular
Relevant train stations: Victoria, Golders Green, Stratford mentioned

Nottingham travellers are regular users of, and highly appreciative, of accessible road links to airports

Preferred mode

- Car is overwhelmingly the preferred choice due to accessible road links in and around Nottingham allowing quick/easy access to popular airports East Midlands, Birmingham & Luton. Some preference for trains when travelling further afield to London which proves difficult / costly to travel to via car

Nottingham's central so it's accessible to get everywhere by car, the transport links are great Nottingham, Holiday

Preferred airport

- East Midlands due to close proximity and convenient car journey (straight road / low chance of traffic)

Challenges and difficulties in travelling to airport

- Long distance travel from car park to the airport causing stress / anxiety of catching flight
- Traffic on the road causing delays to journey time
- High cost for long stay car parking

Ways travellers deal with these problems

- Factor in extra time for travel to the airport to compensate for any delays / travel to the gate
- Booking car park far in advance for lower cost

Willingness to adopt coach travel

- Perceived benefits: low cost
- Perceived drawbacks: out of traveller's control, road delays, unpleasant experience (dirty, crowded, cramped), coach not aware/committed to ensuring flights boarded
- Little to no awareness of local bus routes leading to low consideration / enthusiasm

Regional information

- Closest airport: East Midlands
- Local coach offering in terms of routes: Nottingham Skylink serving Nottingham central to East Midlands Airport (low usage)
- Urban
- Key motorways: M1, M42, A1(M)
- Relevant train stations: Birmingham International, Luton Airport Parkway, Stansted Airport

Booking the long stay car park is always top of my list, otherwise you get stung on the day Nottingham, Holiday



London passengers appreciate having the choice of airports and transport modes by which to get there

Preferred mode

- Public transport the most preferred mode, with driving, or being driven by family and friends (holiday) particularly if the airport is “local” and taxi (business) secondary

Preferred airport

- Majority input *London Airports* as departure point
- Preferences around how easy to get to and from, end destination, cost of flight, reason for travel & who travel with inform choice

Challenges and difficulties in travelling to airport

- Cost of travel/parking
- Stress & overcrowding of public transport
- Ensuring arrive on time, particularly for early morning flights
- Connections/correct terminal
- Travelling with children
- Amount of luggage

Ways travellers deal with these problems

- Use dedicated travel links such as Gatwick Express
- Rely on family & friends to take them to the airport
- Park and fly
- Use coach and taxi
- Stay over-night at airport hotel – free parking

There's another little trick that you can use occasionally, in that some of the hotels around Heathrow, if you stay there overnight, they will let you park your car for a fortnight as part of the deal. Stansted, Intercept

Willingness to adopt coach travel

Perceived benefits

- Inexpensive option
- Guaranteed seat
- Luggage taken care of
- Stress free (relative to other forms of public transport, driving)

Perceived drawbacks

- Breakdown - plan B?
- Ability to meet schedule due to traffic
- Convenience of coach pick up point
- Coach environment, lacking comfort, dirty, cold
- Older generation, families & students “not for me”
- Security of luggage

Perception of routes

- Services to all major airports
- Regular timetable

Airports and key travel hubs for travel in London

Airports in the region considered

- Heathrow, Gatwick, Stansted, City Airport, Luton & Southend

Bus services aware of

- National Express, Megabus, easyBus
- Stations or pick up points at all airports with Victoria, Golders Green, Stratford mentioned
- Option of local bus services if live close to the airport

Key roads

- M25, M1, M4, North Circular

Underground system & DLR

- Local stations
- Piccadilly line (Heathrow) & DLR (City Airport)

Railway stations frequently used

- Paddington, Victoria & Liverpool Street as well as Stratford, Tottenham Hale, Luton, Southend



I look at all London airports, then the cost and which airport. Hopefully it is the one closest to me. As easier to get a coach from Stratford to Stansted
London, Coach User

I think coaches just seem to take forever. It's a bit old-fashioned now
London, Business

I can get to Luton, for an early morning flight, it takes me about 25 minutes .Stansted, early morning flight takes me about 40, 45 minutes from where I live in north west London. The parking's - it could be cheaper, but it's okay. It's still a lot cheaper for me to park at the airport than taking the train
London, Business

You don't have to carry your luggage. You can just put it in the car and you can relax. It's door to door.
London, Business

If travelling from Birmingham Airport or London Heathrow, passengers from Birmingham tend to either drive by car or take a taxi

Preferred mode

- Car, especially travelling to Manchester or London
- Taxi or lift, if travelling to Birmingham Airport because seen as quick, affordable and comfortable
- Train more likely to some if a 'two-day' trip

A taxi to Birmingham Airport costs very little in the grand scheme... if it's Heathrow or Manchester I drive, quicker, I don't want to add to the inconvenience, an already extended journey
Birmingham, Holiday

Preferred airport

- Birmingham due to its proximity
- But major airports recognised as having more direct destination choices or are cheaper, particularly London Heathrow

Challenges and difficulties in travelling to airport

- Luggage, particularly if 1 week or more trip
- Traffic an unknown quantity (but rarely proves a challenge in reality)

Ways travellers deal with these problems

- Luggage – relatively easy if take car
- Allow plenty of time for journey (or if early flight, go to 'airport hotel' night before)

Willingness to adopt coach travel to airport

- **Perceived benefits:** perception cheaper
- **Perceived drawbacks:** slow; unpleasant; unsavoury characters; not door to door; low awareness/ under the radar/ an unknown
- **Perceptions of local routes:** low knowledge (never considered)

Coach, never, ever entered my head... it sounds a hassle, slow, I don't even know if there is a coach station... not on my doorstep... and I have children... got your cases to carry
Birmingham, Holiday

Regional information

- **Closest airport:** Birmingham
- **Local coach offering:** not in frame of reference
- Urban
- **Key motorways:** M6
- **Relevant train stations:** Birmingham



Liverpool travellers habitually use cars for airport travel with very little consideration of alternatives

Preferred mode

- Car travel was the preferred choice for an audience whose primary focus was convenience. Having adopted car travel for almost all national journeys (with the exception of extremely long travel) they gave little to no thought of other modes

I almost always fly from Manchester just because the flights aren't available from Liverpool
Liverpool, Business

Preferred airport

- Manchester airport due to the availability of flights and perceived convenience of travel

Challenges and difficulties in travelling to airport

- Traffic levels causing delays to their journey
- Transporting children or lots of luggage
- Car parking

When you've got children it's easier to stick them in the car and drive
Liverpool, Holiday

Ways travellers deal with these problems

- Leaving extra time to get to the airport
- Travelling in a car rather than using public transport
- Lifts from friends or relatives to the airport

Willingness to adopt coach travel

- Perceived benefits: low cost
- Perceived drawbacks: length of journey (time), lack of comfort, traffic / zero control if faced with a delay, dirty and uncomfortable coaches
- Little (if any) knowledge of airport-specific travel coach / bus routes driven by apathy as a result of preconceptions of coach travel

Regional information

- Closest airport: Liverpool John Lennon
- Local coach offering in terms of routes: 500 Airport Flyer Bus Service serving Liverpool City Centre to the airport
- Urban
- Key motorways: M62, M57
- Relevant train stations: Liverpool Lime Street Station (and surrounding local stations), Manchester airport station



Due to limited destination options and expensive tickets, those from Bristol often travel to airports further afield

Preferred mode

If cost was not an issue driving would be number one choice for most, however if taking costs into account, for many (often those without children) coach travel is their preference

Travelling by car is my preferred choice as I am in control of when I leave but it is so expensive to park and obviously there are the fuel costs so I use the coach, if booked in advance it can be very cheap
Bristol, Holiday

Preferred airport

- No overall preference out of Gatwick, Heathrow or Birmingham
- If flights were cheaper and more destinations were offered, Bristol would be a more popular choice

Challenges and difficulties in travelling to airport

- While Bristol airport is easy to travel to, it is expensive and destinations are limited so airports further afield are more often used. Airports are a 2.5 hour + journey, and most travellers like to leave at least an hour of contingency time, coupled with check in time requirements, a trip to the airport is an all day event

Ways travellers deal with these problems

- More selective of flight times
- Some will stay in a nearby hotel overnight

Willingness to adopt coach travel

- No rejectors of coach travel even if not first choice of transport
- Many are already familiar with coach travel using them for city trips as well as airport transport
- Biggest drawback is travelling to the bus/coach station, given local buses are felt to be unreliable. Most require a lift from friend/family as parking in Bristol is problematic

Regional information

- Closest airport is Bristol, however is often perceived as expensive when compared to other airports (even when cost to get to the airport is taken into account)
- Most frequently used airports are Gatwick/Heathrow and Birmingham.
- Bristol Flyer bus service available from City to Bristol airport
- National Express and Megabus to all airports
- Local bus service is often described as unreliable which can influence decision to use bus/coach to the airport if public transport is required to get to/from bus/coach station
- Trains from Bristol Temple Meads/ Bristol Parkway are seen as very expensive, with little (if any) convenience benefits over coaches and as such a rarely used form of transport to the airport
- Key motorways for travel to airports are the M4/M25 (to London) and M5 (Birmingham)

Those in Norwich feel that they are in a 'dead end' with regards to transport links, so they are open to different forms of transport

Preferred mode

- Car is preferred: for some it's the only option they would consider for its convenience and comfort
- Norwich does not have the best transport links so residents are open to trying different modes available

I do Stansted or Luton, that's as far as I'll go
Norwich, Holiday

We're not going to a London airport, not with my little ones, absolutely not, no
Norwich, Holiday

Preferred airport

- Norwich Airport due to convenience and fast check-in, although it is noted that it is often much more expensive

Challenges and difficulties in travelling to the airport

- Long distances to major London airports require thorough planning
- Travelling long distances also incur extra travel costs

Ways travellers deal with these problems

- Some use Norwich airport if possible, despite much higher price
- Staying at hotels the night before flights is popular
- Coach travel is popular as an affordable way to travel long distances

Willingness to adopt coach travel

- Perceived benefits: affordable, reliable and often convenient
- Perceived drawbacks: timetabling could be more frequent; there could be more space per person and comfort could be improved
- Coach routes are generally well known given Norwich's limited transport links. Coach services could be more direct

Regional information

- Closest airport: Norwich airport
- Local coach offering: to Gatwick, Heathrow, Stansted
- Urban
- No motorways
- Relevant train station: Norwich

Cost and time makes the coach more convenient at times than the train, but not such a nice travelling experience
Norwich, Holiday

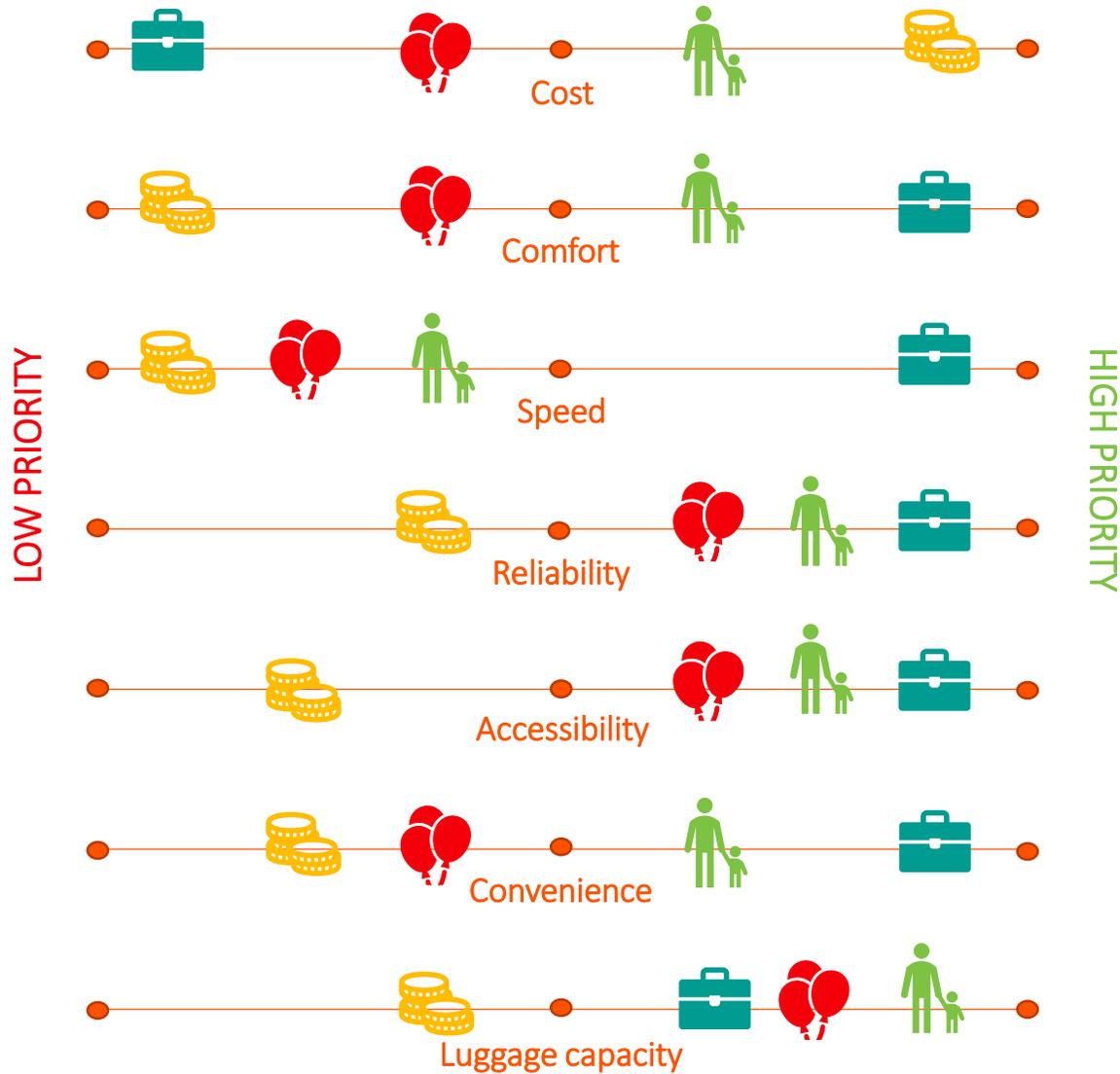
For transport to airports, it's National Express for me: very convenient, very easy
Norwich, Holiday





Analysis by traveller type

Specific types of travellers have different priorities when travelling to the airport



Key



Business travellers



Less affluent travellers



Special occasion



Travelling with children

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

[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

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

Those travelling for **social occasions** look to build a collective experience, choosing a mode that can facilitate a communal atmosphere

For what social occasions do people travel?

- Stag and Hen do's
- Honeymoon
- Birthday parties
- Large family holidays
- Colleagues travelling together

Large vehicles with a social environment are preferred for these journeys

- Hired mini-bus
- Private coach
- Train



Travelling to the airport in these contexts prompts passengers to use this time to be social or work, rather than simply getting from A to B

We went up for a warehouse project in Manchester, like a club night, we all got our snacks and sort of got our seats, all sat together so it was quite a social thing... going on the coach Stansted Intercept

Those travelling in large groups for celebratory occasions have a different travel experience

- Travelling to the airport seen as much more 'part of the journey'
- Celebratory mood means that journey is often more sociable
- Passengers often like to drink

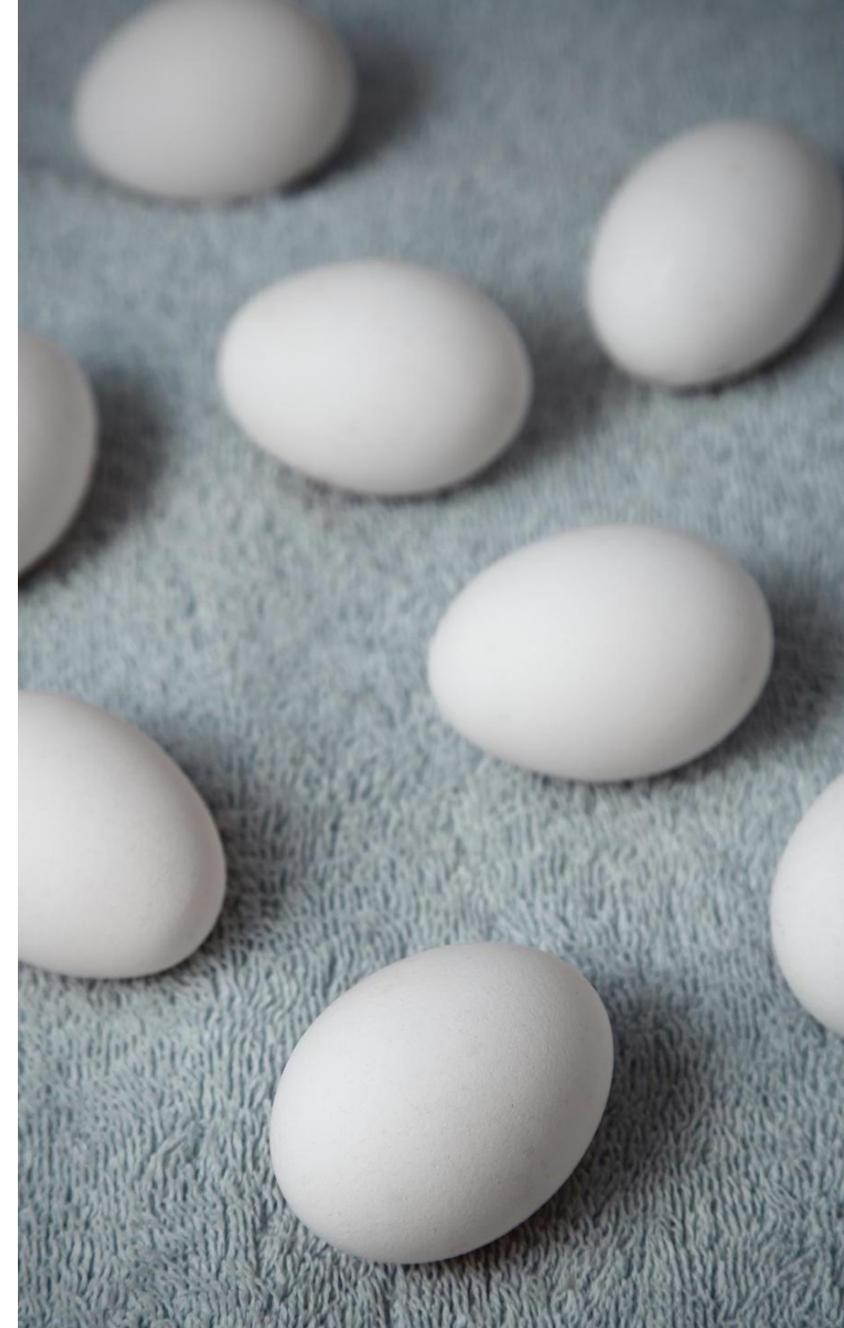
Those travelling in large groups for business enjoy a social environment often to work together or relax and enjoy the travel time

- May require tables and plug sockets to use laptops

Travelling privately in cars is **not** conducive to the social atmosphere sought on the trip

- Few want the responsibility of driving
- Many want to start their holiday when leaving the house

Social groups tend to compromise to include the wider needs of the group



Less affluent travellers are often restricted in the transport available to them

For students and those that need to travel on a budget, price of travelling to the airport is the clear priority

- Includes both flights and travelling to the airport

Students often seek out places to stay before flying the next day

- This is particularly useful for those flying from London airports but living outside of London
- Some aware of car pooling options, websites and apps

Coach is seen as the cheapest form of travel and is therefore often sought out

- Awareness of coach much higher in these groups than in more affluent groups
- Megabus in particular is appealing for value

These groups often do not have private transport options

- Non car owners and taxis can be unaffordable if long distance to the airport

Therefore the choice is between different public transport modes



Many will look for cheaper deals on trains using comparison sites

- But trains still often seen as expensive
- Flight times mean often cannot take advantage of off-peak deals

Well I'm a student. I don't have any money. So if I'm going to the airport I'll always do my research and look for an option that's feasible for me.
Newcastle, Holiday



Travelling to the airport with **children** becomes a different proposition

Those travelling with children often have **techniques and strategies for managing journeys**

- Nonetheless, what can be a stressful journey anyway, becomes even more so with the responsibility of children

Passengers with children have a few key considerations:

- Safety of travel
- Allowing extra time
- Space on mode of transport
- Extra luggage (including children's luggage)
- The worry of children getting lost
- Important amenities to consider (e.g. toilet/ food)

'..we got up early and we tried to carry on with our usual daily routine so that our son would feel as little of the stress that comes with travelling as possible'
Cambridgeshire, Ethnography

Overall, car is the preferred mode

- Luggage capacity
- No danger of losing children
- Parent remains in control
- Door to door

'if the journey had been longer than 3 hours then I'd say a break would have been necessary, as we had children on the coach'
Oxford, Ethnography

Travelling to the airport with children using other modes can be difficult

- Complicated journeys involving interchanges can become particularly arduous
- Stress potential of crowding, lack of seating, keeping children entertained in a public space etc.
- But children themselves often enjoy novelty of train/ coach trips



Those travelling on **business** often have a different style of travel

Those that travel alone or for business, are...

- Independent in travel style
- Often frequent travellers (may have habitual travel habits)
- Mostly confident; leave less time between arriving at the airport and boarding the flight

These passengers can use a mixture of transport modes and often spend less time planning their journey

- If travelling for business, cost is far less important as travel is often paid for
- Time spent travelling is sought to be minimised
- Independent entertainment and/or working facilities often required e.g. quiet space to work, plug sockets to watch films etc.

This group tends to prefer private transport to get to the airport

Taxi and car



- Cost less relevant for business travellers
- Group dynamic not needed
- Door to door typically means less travel time

Trains are also a feasible option

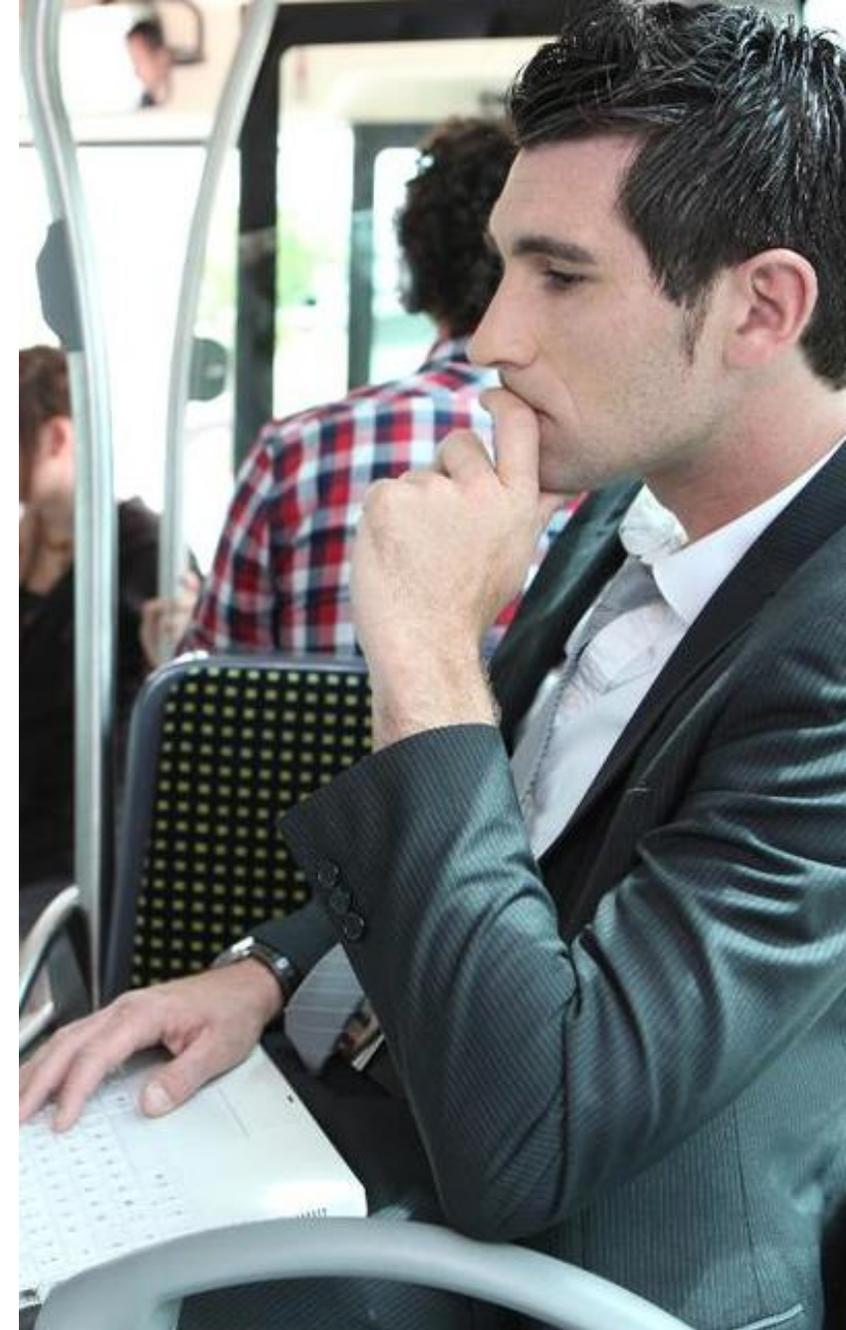
- Speed and comfort of travel appealing for many, as well as the space to work and enjoy leisure activities on the train

[On the train] you can relax. I can read the paper, I can just do a few things before my meeting, get a few things lined up.
London, Business



This group of travellers are among the least likely to take the coach

- Coach often seen as the cheap option
- Business travellers are unlikely to use the coach if their business can afford a more expensive mode

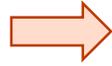




Disabled travellers

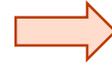
Travelling to the airport is different for disabled travellers

PLANNING



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

CONSERVE ENERGY



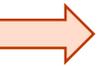
- Some rest in days leading up to the flight
- Important to minimise physical and emotional exertion on lead up to the flight
- Any over-exertion can have a detrimental impact on health

RISK



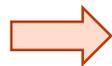
- Disabled passengers must weigh up the risks for each mode of transport
- Consequences of anything going wrong can lead in passenger falling ill or missing their flight

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

- Often disabled travellers 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

You're never sure whether anybody has got any idea of your existence and it could take 30 minutes, it could take ten minutes, or it could take 40 minutes.
Disabled Passenger

It's not clear at the beginning of this line of people, wall of people, where you are. Even though he was there, it still got me a bit cross and a little bit stressed.
Disabled Passenger

Although **car** is often first choice for transport, it has significant challenges

Disabled passengers often favour travelling to the airport by car

- The door-to-door journey is far easier as fewer barriers are likely to be encountered
- Emotionally, having this independence and familiar environment can keep passengers relaxed and enhance confidence for trip ahead

Of course, not all disabled people can drive and may rely on a carer or family member

- In this case, alternative forms of public transport can be preferred as this provides a sense of autonomy

If I'm travelling a long distance then I would definitely want to go by car. I can coordinate it all a lot easier.
Disabled Coach Traveller

However, driving to the airport can be problematic for the same reasons as non-disabled people

- Costly to leave car for long duration
- Stressful if unexpected circumstances occur
- Seen as a chore

The prospect of driving back after a flight can be particularly daunting, as tiredness can be more debilitating for those with certain impairments

- Many are concerned that they would *have a road traffic accident if they are too tired*

Many rely on the services offered by the SRN

- However, roadside services and petrol stations are often not fully accessible, with toilet facilities and refreshments not available to disabled people



Train travel often seen as risky and often impractical; however benefits are also identified

Travelling by train to the airport can be difficult, particularly compared to private transport modes

- Getting to the station, navigating and traversing the station itself, getting on and off trains are all potential challenges

The range of transitions within the journey can feel intimidating and risky

- Particularly if needing to meet a deadline

Nonetheless, many disabled passengers enjoy travelling by train to the airport for much the same reasons as non-disabled passengers

- Quick and efficient
- Ability to sit down and be sociable

Trains are stressful at peak times to be honest. Too busy for me.
Disabled Traveller

The public environment of the train can be an intimidating and threatening place for disabled people

- Passengers can experience discrimination on journeys from both passengers and staff
- There is a perceived 'hierarchy of deservedness', whereby people with certain disabilities are seen as (and sometimes see themselves as) being less 'deserving' of help than others
- Can discourage the use of assistance service
- Standards of assistance services can vary quite markedly, and many are unaware of them at all

Passengers using assistance services on trains would be keen for there to be an interlinked service with airline assistance services



The key barriers to using **taxis** to travel to the airport for many disabled people are accessibility and cost

If taxis are affordable, they are often the best way for a disabled passenger to travel to the airport

However, taxi accessibility can be inconsistent

- Passengers can need help getting in/ out of taxi, assistance with luggage etc.
- Not all taxis wheelchair accessible
- *Not all taxi drivers are sensitive to disabled people's needs*

Challenges can be mitigated by disabled passengers using a familiar taxi company/ driver that understands their needs

Many find taxis unaffordable

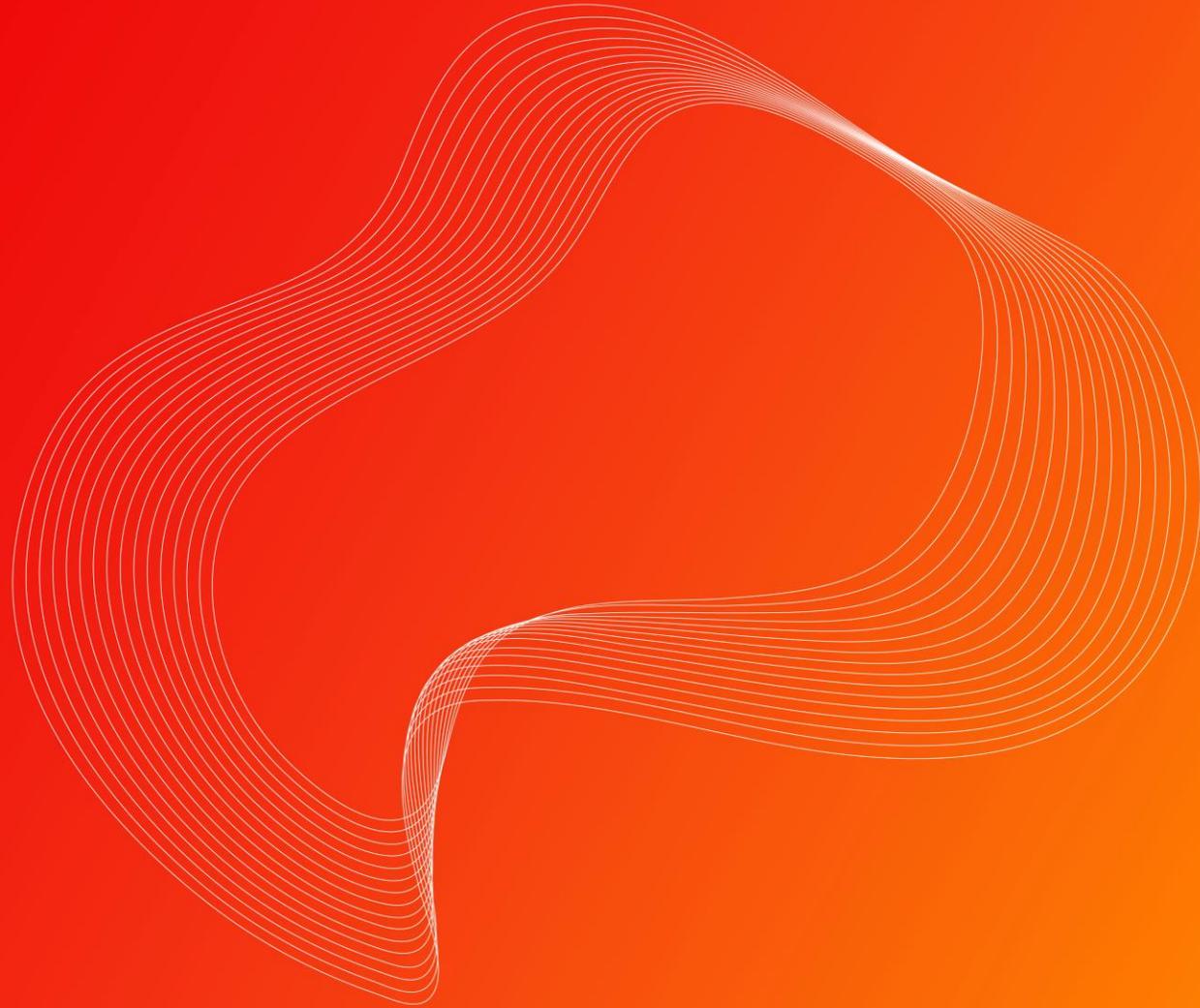
- As per non-disabled travellers

I've been using them for the last, goodness knows how long, 20 plus years. It's the same company so they know me
Disabled passenger

When you are travelling business class you are paying £2,000, £3,000, £4,000 for a ticket, it doesn't, in that context it's not a lot, if you see what I mean
Disabled passenger

It's important I can depend on it. I know what's going to happen with the taxi. I know how it will work. Getting a bus or whatever is just a bit risky in that situation.
Disabled passenger

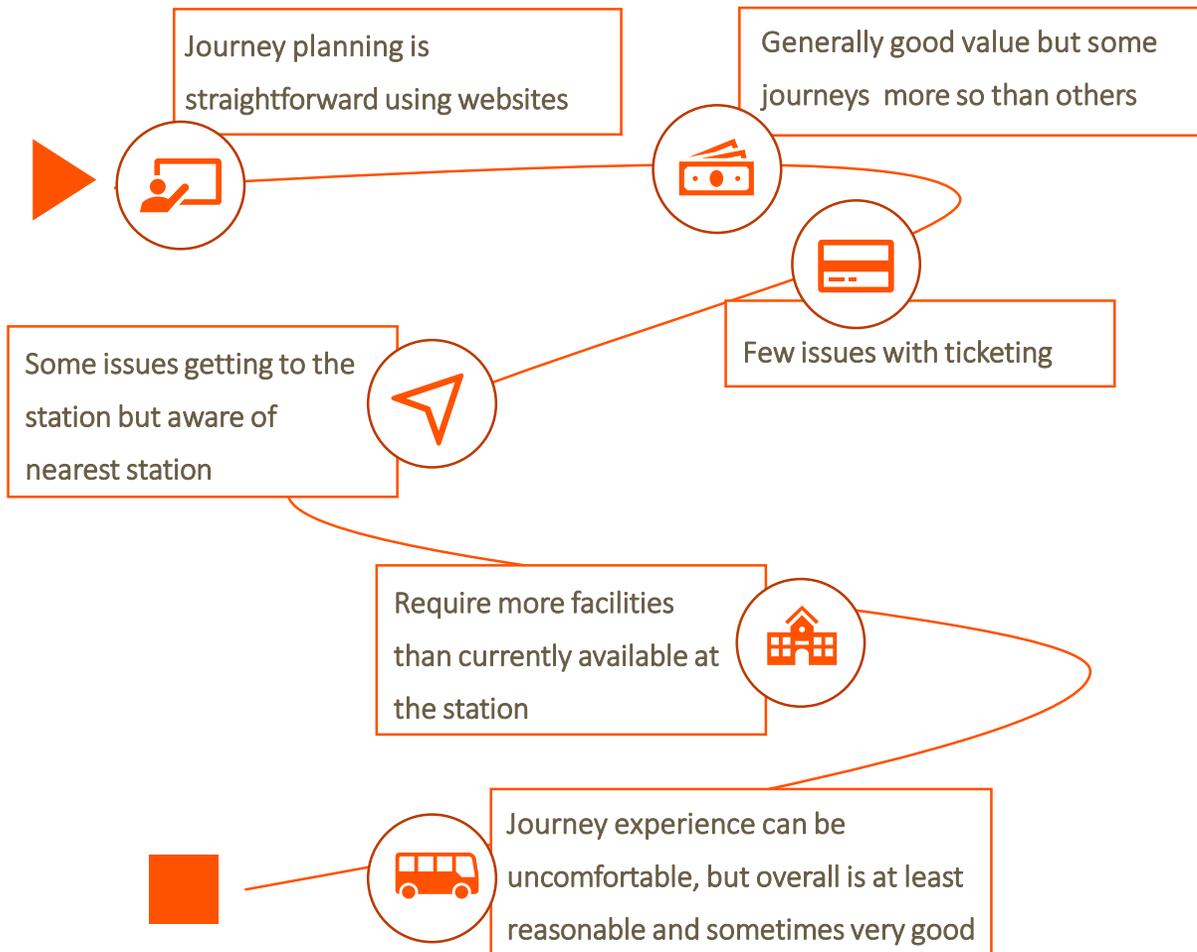




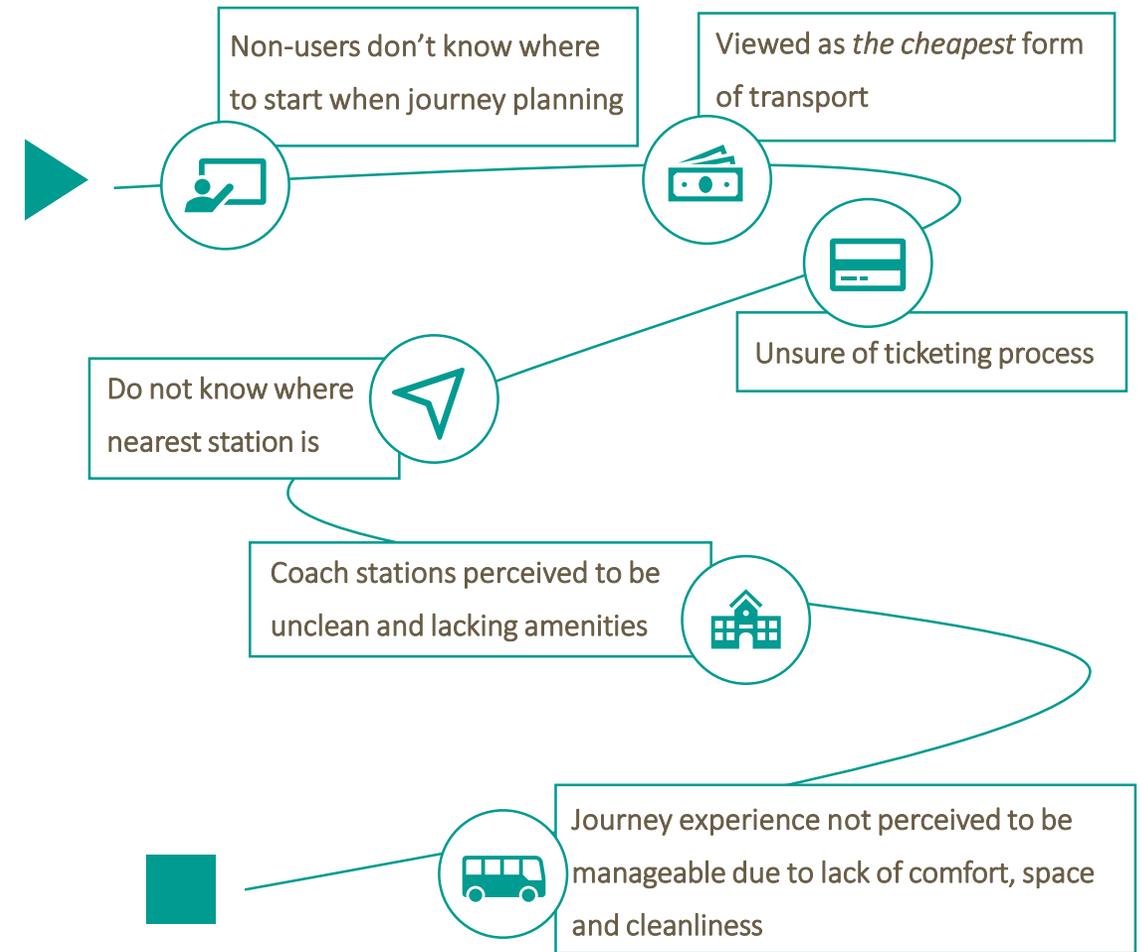
Coach travel

Views on coach travel vary between users and non-users, based on their experiences and perceptions

Coach user experience of end to end journey



Non-user perception of end to end journey





Non-coach user perceptions of coach travel

Coach travel is often stigmatised

Non-users tend to see the as for...

- Students
- 'Young people'
- 'Old people'

The coach is often seen as a mode of transport for the less affluent

Coaches are assumed to be an antisocial environment

Ultimately, many non-users' start point with regard to coach travel is that it is 'not for me'

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, Coach User

A lot of people won't use a coach because of the stigma attached to it, or they wouldn't get on a bus. That may be not opening our eyes enough and thinking Heathrow Intercept



Many are not aware and/or have misconceptions about coach service offerings

Perceptions of coach travel are frequently driven by isolated and long past experiences

- 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 they make

When considering modes ...

- Travellers often only weigh up car vs. train
- Coach rarely comes into consideration

I don't actually know why I've not, really. It doesn't really enter my head when I go travelling, to get on a coach.
London, Business

There is some understanding - but typically very vague - that a coach network exists

But few have any clarity on how it works

- Often assume only to/ from major cities
- Almost no idea on service times, frequencies, costs etc.
- Do not know where/ how to access information, purchase tickets

Even travellers who live very close to coach stations are often unaware of their existence

- Potential passengers are more likely to consider coach travel when they realise how close they may be to a coach station

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, Holiday



Some perceive coach journeys as long and tedious

Some passengers dramatise coach travel by associating it with arduous 15+ hour journeys overseas

- This perception can dominate passenger imagination when it comes to coach travel

And...

Many of those that do take the coach regularly validate this perception with their experiences:

- Although some passengers speak with pride about their diligence and mental stamina in completing long journeys

If I was to go any further than Manchester I wouldn't get the coach anywhere, it would just take too long.
Newcastle, Holiday

Ah man it's long. I've seen it just takes so long. Why would I put myself through that?
Heathrow Intercept

Many imagine they will experience some or all of the following:

- Cramp
- Boredom
- Car sickness
- Loud or crying children
- Antisocial behaviour, drunk passengers

These negative perceptions about antisocial behaviour are worsened by the assumption that there will be no CCTV on board and that the driver will not be able to keep control

I'm not as young as I used to be. When I was 20 I would go to Poland on the bus. It would take 28 hours and I was fine with that. Now anything more than 4 or 5 hours and I lock up.
Birmingham Intercept



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

10 non-users of coach were tasked to make journeys that they would not normally make by coach

Locations ventured included:

- Blackpool, Bury, York, London, Manchester, Bradford, Birmingham, Leeds, Huddersfield

And many were pleasantly surprised by their experiences...



Got the coach from Leeds to Huddersfield, there wasn't any delays, was a great day all round and flowed perfectly
Non-coach User



- Planning the journey was relatively straightforward, with many 'googling': coach, starting point, destination
- Only a few used the National Express website



- 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
- Many liked that they did not have to print tickets off

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



- 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

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



Experiences of coach travel

Coach users typically describe coach travel as cheap and are grateful for this option

What price point is cheap?

Passengers consider the value of coach travel in relation to the cost of other transport modes (especially train)

- Is it cheaper than the train? **Yes**
- Is it cheaper than a taxi? **Yes (considerably)**
- Is it cheaper than driving? **On a par**

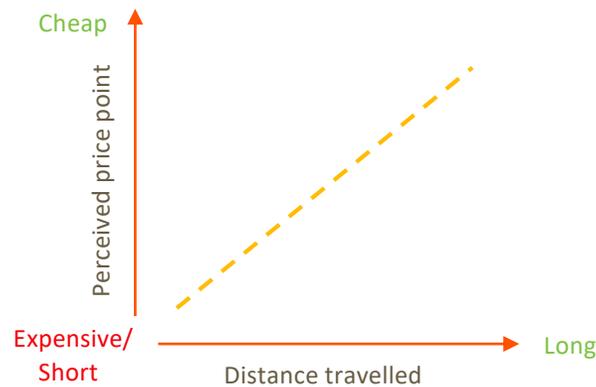
Coach is often spoke about as the 'cheapest' option

- Partly driven by awareness of extremely cheap deals (e.g. Megabus £1 fares) even if never taken advantage of

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

However, there is a trade off between price and journey experience

- For shorter distances, the price of the coach is not that different from the train
- For longer distances the gap expands
- **But longer journeys by coach (2 hours +) are often seen as a hardship and even some regular coach users do not consider it for longer trips**



Others take a 'no pain no gain' perspective

For some of those making long journeys using coach (Megabus in particular), stoic attitudes are displayed in accordance with a cheap price of travel

- Feel that a long journey and uncomfortable journey is a fair price to pay for low fares
- Some even enjoy the challenge

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

If coaches had drinks served on and everything, I bet people would pay another £20, £30. It's still cheap in comparison with the rail Newcastle, Coach Users

Although cost is typically seen as an advantage of coach travel, some passengers question whether it is always good value...

The cost of coach travel is often seen as inconsistent

There are regional inconsistencies in cost

- Some passengers perceive the costs to be higher if getting the coach from specific (and less populous) areas of the country
- For example, those travelling from remote areas of Essex consider their coach tickets more expensive than travelling from Victoria

And journeys to the airport are expensive compared to similar length journeys to other destinations

I used to book flights to Poland for £7 with Whizz Air and it would cost me £16 to get the coach to Stansted and it was just this thing that it costs more to get to the airport...
London, Business

Fares do not always match expectations

Passengers often expect the coach to be *significantly* cheaper for the extra journey time it is associated with

For example...

- A return journey taking the coach from Kings Lynn to London:

	Coach	Train
Price	£40.00	£50.00
Time	4 hours	2 hours

- The difference in price set against journey time is often not seen as good value



Some find the coach comfortable and relaxing

There is a sense of privacy on the coach that is not necessarily available on other public transport

- The feeling of being confined to one seat with no direct eye contact with other passengers can provide a private space
- Can foster an environment for relaxation and personal entertainment

Once on board, the passenger has no need to do anything

- Little need to get up and move around
- Unlikely to be disturbed by other passengers, staff, announcements etc.

It was standard, quiet...I got to play Pokémon!
Birmingham Intercept

Unlike train, passengers know they will always get a seat

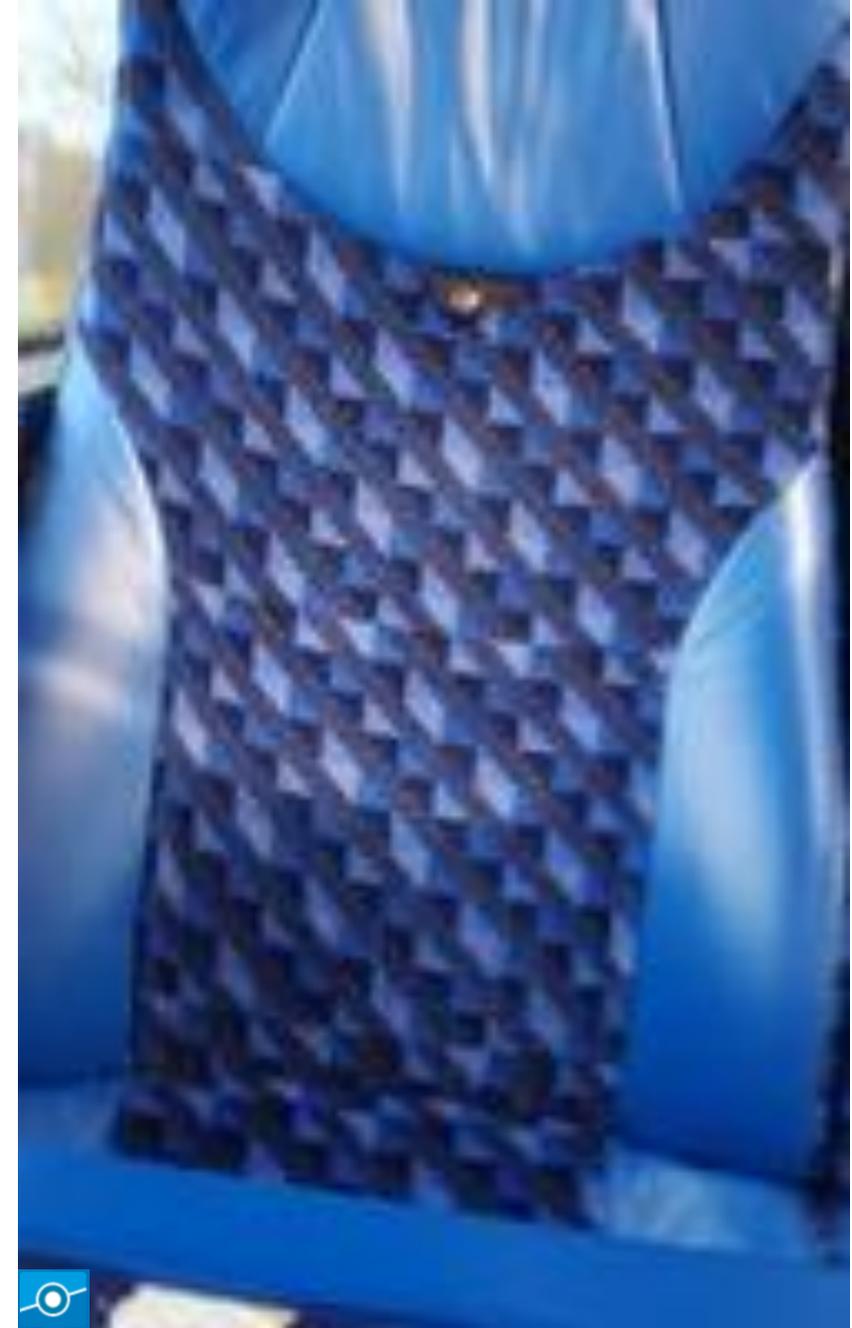
- Although passengers can become frustrated by the lack of seat reservation service and can be separated from travel companions

Added bonus; free wi-fi, so I can keep on messaging people
Stansted Intercept

Particularly long journeys are conducive for sleeping

Some enjoy the ambience of quiet coach journeys and can find them soothing

After Sheffield coach completely full so now have another passenger next to me. Not much space and definitely missing the train's freedom of movement.
Leeds, Ethnography





End to end
journey
experience

Planning the coach journey

Some preparation takes place before the mode of transport is settled upon:

- **Google Traffic** allows passengers to see the state of the roads, potentially even before coach is decided upon
- **Google Maps** offers passengers a range of potential modes to choose from all at once
- **Skyscanner** and **Blue Air** can inform passengers of different route options and prices, again before a mode is firmly chosen

Planning often focusses on getting a good price for the coach journey, and ensuring that the journey itself is enjoyable:

- Passengers think about packing entertainment and supplies (pre-loading films to their computers; bringing snacks etc.)
- Passengers may also search for discounts and vouchers online

There is less of an emphasis on planning for the logistics of the coach journey; coach travel feels relatively spontaneous

- Most coach users book online; some use telephone booking for reassurance
- Planning coach journeys does not strike passengers as particularly challenging (NB – many are experienced users)
- Non-airport travel is more likely to be spontaneous, with some booking tickets at the coach station rather than in advance.

I would just go on my tablet, coach travel to wherever I want to go and then bang, I'd get it that way.
Coach User

Less experienced coach users plan more thoroughly for coach travel

- *What stop to get off at?*
- *What will the journey be like?*

I went online to find coach company for the trip we wanted to do, important to have good customer review feedback as not tried coach trip before
Non coach user

Am sure all will be okay; it's an organised trip that goes weekly and has good reviews
Non coach user

If getting to the coach station is perceived as difficult, passengers may choose another mode of transport altogether

Getting to the coach station can vary considerably, depending on:

How far away the passenger lives from coach station:

Passengers' transport capabilities:

- Whether owns a car, bicycle, motorbike etc.
- Whether has family/friends to take them to coach station

Time of day passenger is travelling:

- Late at night or early in the morning there are unlikely to be public transport options available

Passengers might use any mode to reach the coach station:



Choice of transport mode can depend on the infrastructure near the coach station

- Is there space to park?
- Is there a convenient place to be set down from a lift?
- Can I lock my bike up nearby?
- Is it easy to walk?
- *And for disabled passengers, there are a whole host of issues (see slide 64-67)*

Some areas that passengers board the coach are not stations at all

- These can be 'bus stops' on the side of the road
- Often no facilities
- Some passengers use cafes etc that are local to the coach stop

The coach station is past our house in the opposite direction to the airport. Given that we'd probably have to get a taxi there as we wouldn't be able to leave the car it doesn't make sense to go by coach as we'd already be in a taxi
Milton Keynes, Ethnography



Passengers often have to spend some time in coach stations, so facilities are sought after

Passengers may have to wait at a coach station for considerable amount of time, particularly if making an interchange between coaches

- Delays or cancellations can increase wait times

Passengers also interchange from other modes (e.g. plane, train, etc.)

- Lack of integration with other transport modes means waits may be lengthy

Not sure if that level of staffing would make me feel safe traveling later in the day as a lone woman?
Leeds, Ethnography

Victoria station is gloomy and hectic. There was plenty of information on screens to help out but generally poor as not enough seats and queues of people everywhere
Leeds, Ethnography

The potential for long waiting times means that passengers expect the facilities at the coach station to be adequate

These facilities include:

Toilets

- Expectations low for toilet facilities but many need to use in station to avoid using toilets on-board the coach

Refreshments

- Passengers would often like options for hot food and preferably fresh food

Seating

- Passengers do not only want ample seating but also comfortable seating
- Passengers are not happy with cold, hard plastic/metal chairs
- A suitable temperature is also needed as coach stations are often exposed to the elements

Staff

- Passengers can be confused as to the next steps on their journey and often have questions
- Passengers often seek staff to answer these questions and provide reassurances regarding their journey

Information points

- If there are no staff available, passengers seek out information from screens, leaflets, or ticket desks

Entertainment

- Passengers have suggested having televisions inside the coach stations showing BBC News or other channels
- Many have to sit in the station for a number of hours, and this can be a very boring experience

The journey experience on the coach can be difficult, but passengers have strategies to make it enjoyable

First-time coach users are often pleasantly surprised by their experience

- General sense that it was better than they were expecting
- They tended to enjoy the journey – our ethnographic diaries feature a number of happy selfies taken with family and friends
- Often struck by the friendliness of the driver

Passengers employ various strategies to deal with the perceived drawbacks of the journey

- Stock up on food and drink, as well as chargers, laptops, iPads and other entertainment devices to keep from being bored
- Parents will bring toys and games to keep kids quiet

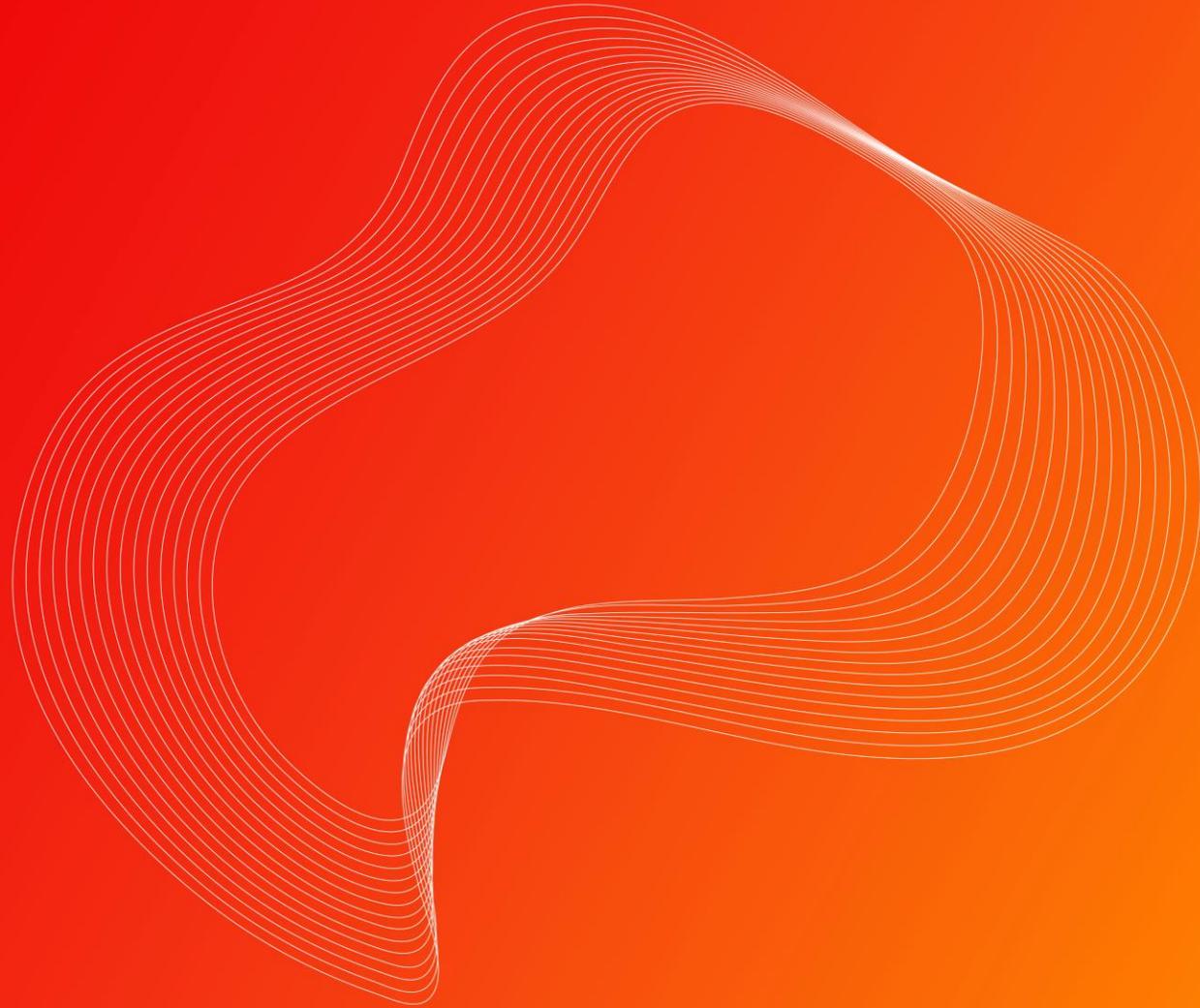
Mid-journey stops; service stations etc.

- Welcome relief, especially for those with children
- Not much trepidation about leaving bags on the bus – passengers generally trust the driver to guard their belongings
- Adds another layer of uncertainty for disabled passengers: *What will the provision be at the service station?*

During the travel to Blackpool it was a fun experience. Again, with music playing and a simple travel.
Leeds, Ethnography

I would think I'm going to have to write the whole day off, I'll have to put my head in the zone and I'll just get in there. I'll just think I'm going to get through the next hours, but it's going to cost me a tenner
Newcastle, Holiday





Coach travel for disabled passengers

Disabled coach passengers experience many practical challenges

Steps up and onto the coach

- Those that have mobility impairments may find it difficult, if not impossible, to board a coach using the steps
- For mobility impaired people that do not use the coach, the prospect of having to use these steps is enough to not consider coach at all
- There is little awareness of any disabled access that bypasses the use of steps

For some disabled passengers, using steps onto the coach is feasible but exhausting and potentially embarrassing

- Many think they *could* board the coach using the steps but would not want to put themselves through the physical strain and would be concerned that other passengers and staff would 'stare'

Lack of wheelchair accessible space/seating

- Many have to rule out coach travel because not only is boarding the coach in a wheelchair often not feasible, but there is perceived to be no space for a wheelchair user on board

For disabled passengers that require space...

- Coach travel is not seen as spacious, and is associated with cramped conditions

For many, using the toilet on a coach not feasible

- Too small, cramped and steps often leading down

Coach stations have an array of practical barriers for those with mobility impairments

- Can be large spaces that are difficult for some to traverse
- Disabled toilets can be far away and/or used inappropriately e.g. for storing cleaning equipment



The experience of coach travel is largely positive for those disabled passengers that can 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 the 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 (invisible disability)
- 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



Coach travel seldom poses the same emotional challenges associated with other forms of public transport

Travel by coach removes many of the stressful areas of travel by public transport and makes for a more relaxing travel experience

- Local pick up points can be convenient to get to
- Tend to be less crowded, intimidating and difficult to negotiate
- Coach travel requires less meticulous planning at all journey stages
- Frequently no need to change once on board, with A to B travel more usual

I get a coach and I'm going to be dropped pretty much where I needed to be dropped and I don't have to then change, then I'd go with that
Disabled Passenger

Driver provides emotional reassurance, on many levels, with standards of service praised

- Reassurance as to correct coach boarded
- Assistance to hand in medical emergency
- Provide information as to timekeeping, issues on route
- Direct to facilities at bus station or rest location
- Advise as to onward travel
- If travel frequently may be known to passenger

Boarding and alighting often cited as pain points of worry, are alleviated by the presence of the driver

- Happy to provide a guiding hand to negotiate steps
- Help with luggage (hold) or with bags to seat

Requires less interaction with fellow travellers

- For those with less visible disability, lessens the potential for discrimination as have own guaranteed seat and, as coaches deemed less busy, frequently able to sit on own

I need reassurance that I am on the right coach and although it might say on the front and on the departure stand I need to ASK and the drivers are always there and helpful
Disabled Passenger

I go to see my mum once a month at Clacton and I just get on the coach and I know I am safe and comfortable, I have my seat and no one is going to be mean to me
Disabled Passenger

Booking tickets for coach journeys is not seen as particularly problematic, with the exception of visual aid screen reading software

Whilst planning is still required, many are seasoned users of coaches and familiar with routes taken

- Ensure have correct timeline for journey and locations for departure
- Allows for ample time to arrive to board coach

Purchasing and locating tickets, for journey by coach, seen as relatively straightforward in comparison to rail or flight purchases

- National Express site and Megabus easy to navigate
- Clear signalling of coach timetable and locations
- Ticket prices and lack of tiers easy to decipher

I find it all very easy. Tickets are simple to locate and easy to understand the prices. I just download it to my phone and then I don't need to fumble in my bag or worry where I have put my ticket when I need to show the driver

Disabled Passenger

Purchasing tickets proves to be no barrier

- Passengers are happy to book online using the journey planner on the homepage
- Ticket-holder sent an order confirmation email
- Option to print the ticket email or store on phone or app
- Can purchase tickets in person at coach station or post office

No expectation or understanding of a dedicated assistance service at departure points due to the immediacy of information staff at larger coach parks and a dedicated driver

The drivers are lovely and always willing to help everybody young or old. If I did have an issue then I don't worry that they wouldn't be able to help or be rude

Disabled Passenger

There are some issues for those with visual impairments

- Screen reading technology not always compatible with ticket booking websites
- Alternative ways of booking tickets (e.g. booking over the phone) seen as a lottery as to how helpful staff member is

So I have a screen reading technology, it's called Dual Screen Reader, and what it allows me to do is everything on the screen is spoken to me. I'm a reasonably frequent user, I mean I use internet every day, for the news and other things, but when it comes to booking a ticket, I have to tell you, it needs some passion and some real...oh gosh, it is not easy!
Disabled Passenger

There was very little mention of assistance services, or indeed awareness of assistance service when prompted



Coach travel to the airport

The key benefits of travelling by **coach** to the airport are centred around cost and convenience

Assumed **benefits** of travelling by coach *to the airport*

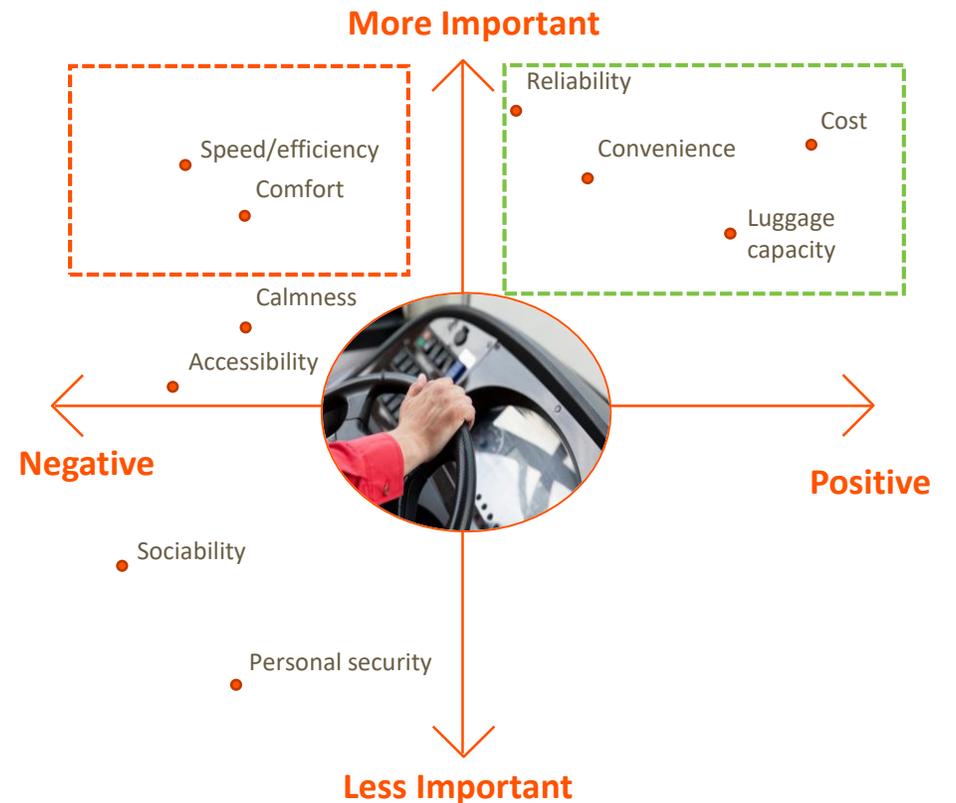
- Coach is seen as the cheapest way to get to the airport for those travelling long distances
- Ample luggage storage available
- If passenger is able to get the coach 'door-to-door', the coach becomes more appealing (and sometimes quicker) than other forms of public transport

Assumed **drawbacks** of travelling by coach *to the airport*

- Not seen as comfortable or sociable, which puts off many that consider their holiday to start 'when they leave the front door'
- Cannot get to the airport quickly or spontaneously
- Not perceived to be able to 'turn up' at the coach station and wait for a coach. Familiarity with timetables is low, and timings are perceived as irregular

It is too cramped, it's just not comfortable enough, too stuffy. I got hot a lot of the time, so I just need a bit of space. Three hours is okay but any further it would be the train or drive.
Newcastle, Holiday

Positive and negative aspects of using a coach, and their relative importance:



Many passengers have never considered travelling by coach to the airport, but once prompted might contemplate it

A theme common to all stages of research was the notion of the coach being underrated

- When considering the different transport options to the airport, coach is seldom top of mind

There is generally high awareness of all modes, *except coach*

No one got off, no one got on. They just kind of carried on along the M1, and I was actually taken aback at how comfortable it was, how quick it was just being Wi-Fi enabled. So I think maybe I'm a bit unfair on a coach.
London, Holiday

However, when passengers are prompted to discuss coach as an option of travel to the airport...

- Coach travel appears more favourably
- And passengers begin to discuss the advantages and disadvantages of coach travel, prompting a key perceived **trade-off**:

Cheap and convenient vs. **Uncomfortable and slow**

For many, two key questions are then asked about the perceived negatives of coach travel...

- How uncomfortable can it really be?
- Can I plan to allow for more time getting to the airport?

If these questions are answered with assurance, then passengers are more likely to consider coach travel to the airport

My God, I still remember there was one trip which was I got off at Luton reasonably late in the night. It must have been nine, ten or something. It was bitterly cold and I was standing at least half an hour... I finally got squashed in the bus. Since then, I've never got onto a coach.
London, Business

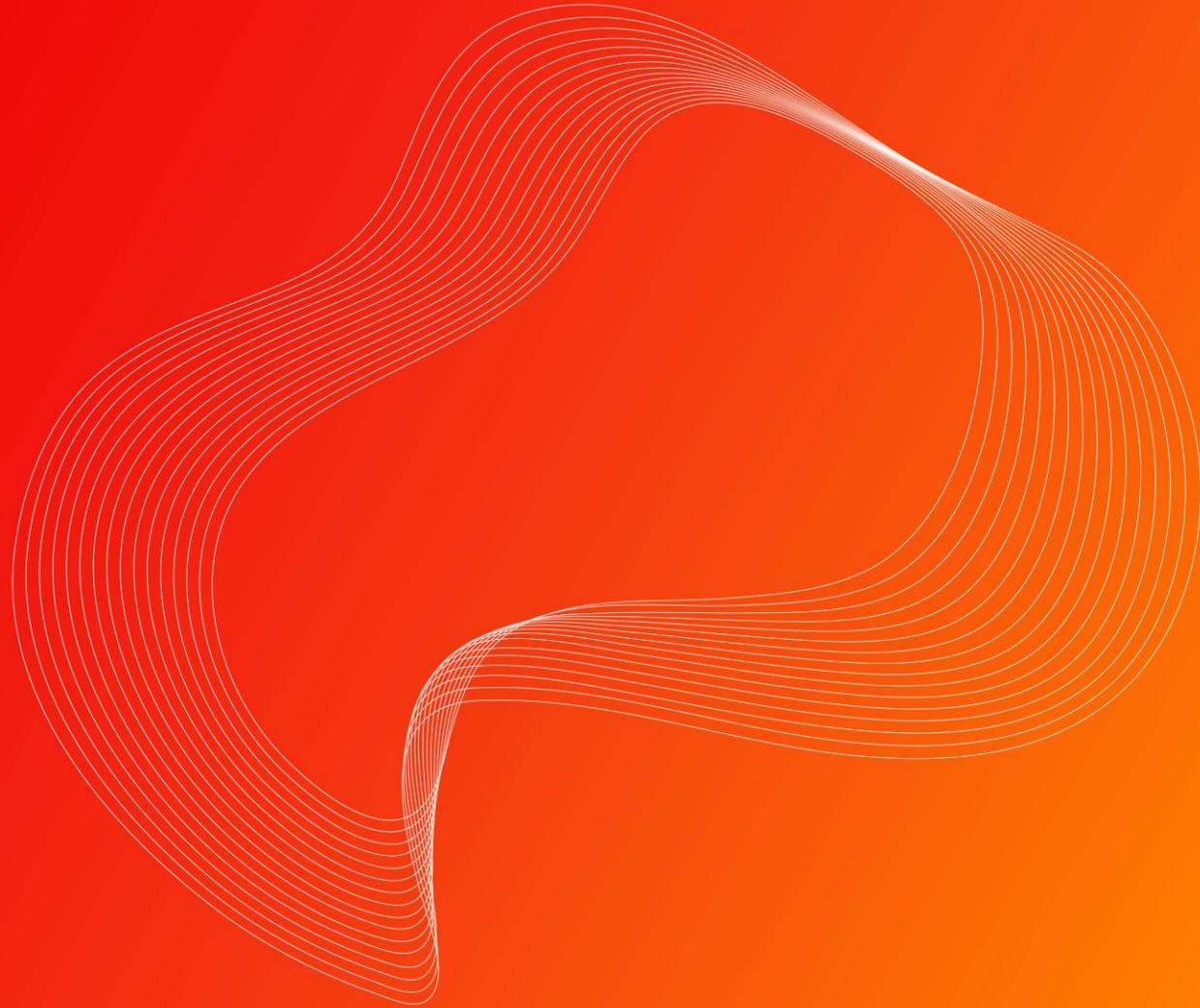
Some passengers are more likely than others to start using the coach to travel to the airport



Vox Pops

Stansted Vox Pop, Recent Graduate Infrequent Coach User

Birmingham Vox Pop, Frequent Coach Users



Conclusions

Travel to airport summary

Travelling to the airport is different from other journeys people make because they are:

- High risk
- Emotionally charged
- Infrequent

Instead of *choosing* which airport to fly from, passengers first choose a destination to go to

- Passengers can have a preferred airport, but very few are loyal to any airport in particular

The consideration of how a passenger will get to the airport itself is relatively low down on their priorities in planning to travel abroad

- And this can be an 'afterthought' that becomes more prominent the closer the date of travel gets

Passengers want to get to the airport with the **least stress** at an **acceptable cost**

- But these variables can override this calculation, providing passengers with little choice

There is a degree of path dependency whereby they repeat what has been successful in the past

- This is another way of reducing stress
- Similarly, poor experiences on one mode tend to prejudice passengers against the mode

While passengers have habits and preferences, these can be ridden by a wide range of **situational variables, including:**

- Passenger type
- Geographical start point
- Journey purpose
- Affluence
- Journey occasion

The other key overriding factor is perceived or actual availability of different modes



Travel to airport: changing behaviour

In meeting the core need of getting to the airport at low stress and acceptable cost, passengers have a range of criteria:

There is no single transport mode that matriculates against all criteria

- Getting a lift to the airport is ideal, but not available to everybody
- Taxi and train are seen as comfortable but often unaffordable
- And driving ticks most boxes but is not available to everybody and can be logistically challenging
- Whereas coach is seen as **unreliable, uncomfortable** and **inconvenient**

On balance, private modes tend to 'tick more boxes'

		Modal choice					
		Coach	Car	Taxi	Train	Getting a lift	The tube
Criteria	Availability	✓ ?	✓ ?	✓ ✓	✗	✗	✗
	Reliability	✗	✓ ?	✓ ?	✓ ?	✓	✓
	Comfort	✗	✓ ?	✓ ✓	✓	✓ ✓	✗
	Convenience	✗	✓	✓ ✓	✓	✓ ✓	✓
	Value/affordability	✓ ✓	✓ ?	✗	✗	✓ ✓	✓ ✓

The two key challenges in promoting public transport is the perception that public transport is:

1. Difficult of use (access and availability)
 - In some areas public transport is not an option, or is complicated with modal switches or interchanges
 - Hence in London, where public transport is preferred, public transport is more ubiquitous and wider choice
2. Cost
 - Challenge perceptions (though maybe real) that public transport is expensive, particularly rail
3. Journey experience
 - Issues around reliability, comfort and convenience
 - Some of these are real issues, but some is around communications

Coach has the potential to be more of an option as public transport, because it addresses the cost issue and does not require major infrastructure investment

Summary of attitudes towards coach travel

Awareness of coach travel is remarkably low

- 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 lack sufficient **knowledge** to take advantage of it
- By contrast, regular users of coaches do not report any confusion with the coach system: they are aware of different coach companies, timings and often know to bring supplies such as chargers or food

There is a some stigma around coach travel

- Even those more familiar with coach travel refer to extreme hypothetical situations around long coach journeys (15+ hours), drunk passengers and cramped conditions
- The idea of short, uneventful coach journeys is not very powerful in non-users' minds. They are more prone to imagine **things going wrong** and having a difficult journey
- Many assume that coach travel is '**not for them**'. Because coach travel is well-recognised as a low-cost option, there is a tendency to see coach travel as confined to certain groups (younger; older; less affluent)

On reflection, many non-users recognise potential advantages to coach travel

- All modes of transport to the airport have their perceived disadvantages, many of which the coach is seen as having the potential to address
- Particularly in terms of value
- In addition, many passengers suspect that coach travel cannot be as arduous as they may imagine

First-time coach users are struck by how pleasant coach travel is

- First-time coach users regularly highlighted friendly station staff, comfortable facilities, and **few problems**
- Passengers travelling with friends and family tended to enjoy their journeys and were able to **have fun on the trip**

Recommendations: Coach travel

Make people aware of the coach service offerings from their locale

Confront stigma surrounding *who* travels by coach

Highlight comfortable aspects of coach travel and emphasise space

Encourage non-users to trial coach travel because they can enjoy it

Before passengers can adopt coach travel, they will need to be certain where their nearest station is, what locations it covers, and a better understanding of how the mode functions (service frequency; booking and ticketing; boarding and alighting etc.)

The need for certainty and knowledge is particularly important given the planned, high-stress nature of airport travel: passengers are highly unlikely to take a coach to the airport spontaneously

Passengers need to have a solid understanding of coach travel well in advance of their journey

Coach travel is seen as a cheap proposition, but not as a value-for-money proposition

It will be necessary to emphasise the quality and range of amenities of coach travel, so that passengers see coaches as a **smart choice**, rather than just a **cheap one**

Shifting perceptions from '**cheap travellers**' to '**savvy travellers**' may combat negative stereotypes about coaches and coach passengers (budget airlines serve as a useful analogue)

If passengers are assured of a certain baseline of **comfort, space and reliability**, the low cost of coach travel can entice passengers to trial coach transport. By seeing coach travel as reliable they will feel able to relax

Passengers will need reassurance on the following key questions:

- *Is coach travel really that uncomfortable?*
- *Can I rely on the coach to get me there on time, even if I have to leave a bit earlier?*

Encouraging passengers to try coach travel would help cement coaches as an option, challenge stereotypes, and build confidence with the service

Passengers may not want to trial coach travel to the airport if they have rarely used it in the past, but making it part of an attractive end-to-end journey 'bundle' may be appealing

It may also be worth encouraging passengers to take a lower-stakes, non-airport journey so that they can build confidence in coaches as an option



Illuminas
Enlighten. Empower.

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