

# Transport for London

Coach Visitors Survey

September 2015

TfL number: 15060

FT number: 1831

V3.0

future  
thinking

MAYOR OF LONDON

Transport for London





# Contents

- Objectives and method (slides 3-5)
- Key findings (slides 6-7)
- Expectations for walking/waiting times (slides 8-15)
- Experience of coach trips (slides 16-21)
- Legible London (slides 22-24)
- Park & Glide (slides 25-27)
- Summary (slides 28-29)
- Appendix (slides 30-31)



Images subject to copyright and supplied by thinkstock

The image features a solid teal background. At the top, there are white geometric shapes: a large triangle pointing right, followed by a white diamond shape, and another teal triangle pointing right. The text "Objectives & method" is centered in the lower half of the image in a white, sans-serif font.

# Objectives & method



# Objectives

To build TfL's understanding of visitors who come to Central London by coach

The research will enable TfL to:

- Measure how important it is for passengers to be dropped off/collected as close to their destination as possible
- Gain an understanding of passenger experience on coaches
  - Information on pick-up/set-down locations
  - Experience and impact of coach delays (to measure whether the development work in London is having an impact on coach passengers)
- Measure use of Legible London
- Explore interest in the Park and Glide concept and test whether the features appeal to visitors



# Method

## Intercept interviews across major London attractions

### Face to face survey:

**474**

Interviews with visitors who used organised (rather than scheduled) coach services to travel to London  
Respondents include those who live in London, rest of the UK and outside the UK

### Interview length:

5 minutes

### Fieldwork dates:



Locations	Completed interviews
Buckingham Gate	80
Grosvenor Place	107
Theatre Land	74
British Museum	55
The London Eye	92
St Paul's Cathedral	66

### Technical note:

As part of our integrity checks, data were weighted to the 2014 profile (by age and region). The pattern of the results for 2015 is broadly aligned on both weighted and unweighted data, although this year's sample contains more older and UK based visitors.

**Data for 2014 and 2015 are unweighted**



Key findings

# Coach visitors are generally open to walking and have a positive experience in the Capital

## 1 Waiting / walking times

- Nearly all visitors are satisfied with the waiting time to be picked up by coach and the walking distance to their coach
- Visitors are willing to walk for up to 10 minutes to a venue and for those staying overnight, to their accommodation. Although still relatively high, there is a drop in the proportion willing to walk for up to 15 minutes
- Similarly, a higher proportion are willing to wait for up to 10 minutes (than they are for up to 15 minutes) to be picked up by their coach

## 2 Experience

- Very few visitors experience problems getting to or from an attraction or venue to their coach
- A significant minority are experiencing delays; however they tend to be minor
- Safety levels are very high, with only one per cent saying the pick up/drop off location was unsafe

## 3 Legible London

- Around a third had used Legible London maps
- The majority of users find the maps very helpful

## 4 Park and Glide

- The Park and Glide concept has appeal among visitors; with only 14% out-rightly rejecting it
- The proposed features of the concept all resonate with visitors interested in the concept

The background is a solid teal color. At the top, there are white geometric shapes: a large arrow pointing right on the left side, and a diamond shape on the right side.

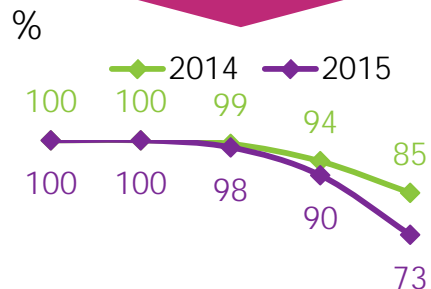
# Expectations for walking/waiting times



# Trip participants continue to be willing to walk as part of their journey by coach into Central London

This year fewer visitors were prepared to walk more than 10 minutes to an attraction or their accommodation, perhaps reflecting this year's slightly older sample

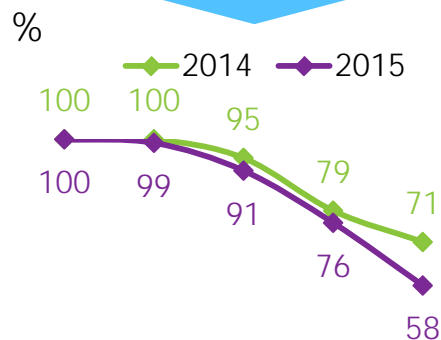
## Walk to venue



1 min 1-3 4-6 7-10 10-15  
mins mins mins mins mins

A5. – Base: All 2015 (474);  
All 2014 (231)

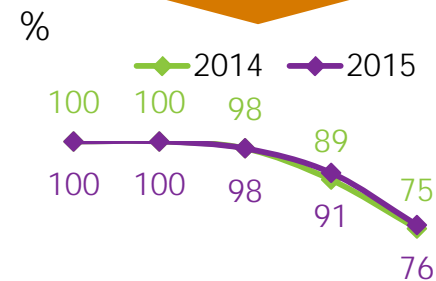
## Walk to accommodation



1 min 1-3 4-6 7-10 10-15  
mins mins mins mins mins

B2. – Base: All staying overnight 2015 (217)  
2014 (112)

## Wait for pick-up



1 min 1-3 4-6 7-10 10-15  
mins mins mins mins mins

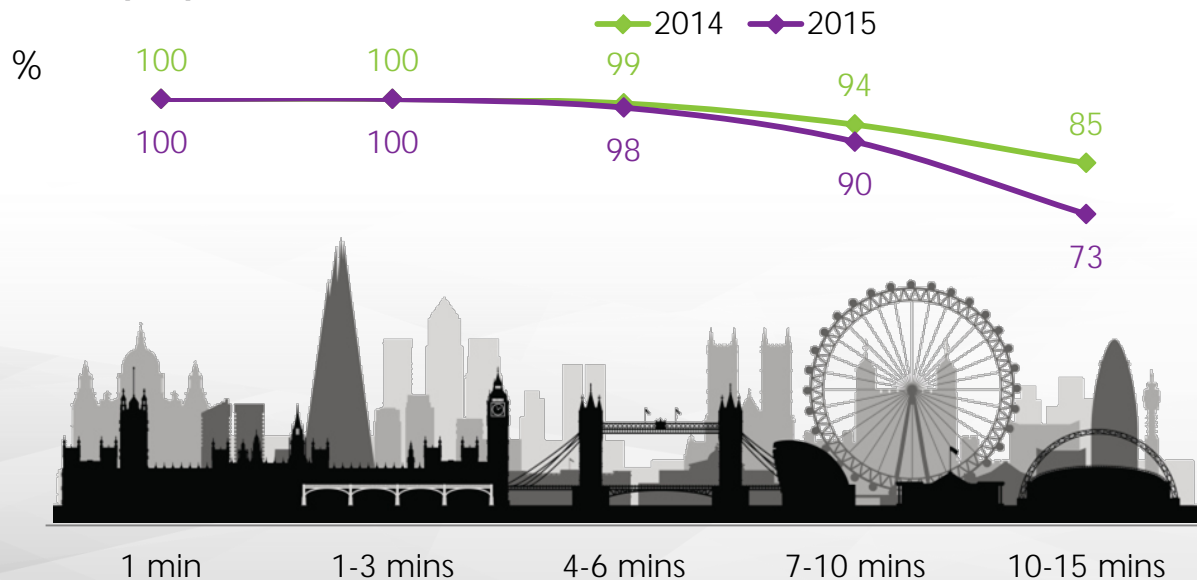
B4. Base: All 2015 (474);  
All 2014 (231)



# Willingness to walk between the coach and attraction for up to 10 minutes remains high

There is however a drop in the proportion willing to walk for up to 15 minutes; with younger visitors more willing than those aged 55+

Distance prepared to walk *between the coach and the attraction*



Trip participants interested in the Park & Glide concept are the more open to walking for longer than those not interested

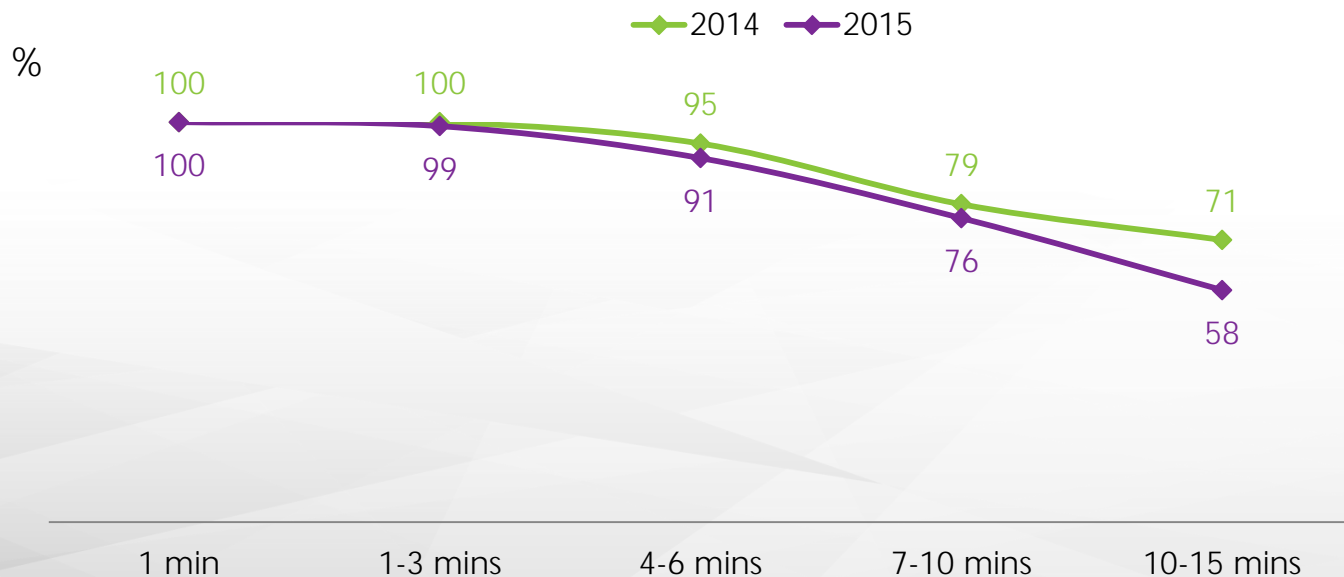
A5. Thinking about the distance you are prepared to walk to/from the coach to the attraction or area of London you are visiting...would you be prepared to walk... Base: All 2015 (474); 2014 (231)



# Visitors staying overnight are more willing to walk for up to six minutes

Although willingness to walk follows the same pattern as 2014; 2015, sees a significant decrease in trip participants prepared to walk for up to 15 minutes

Distance prepared to walk between the coach and hotel/accommodation



Again, older visitors (aged 55+) are less prepared to walk longer than 10 minutes



B2. Thinking about the distance you are prepared to walk to/from the coach to your accommodation/hotel...would you be prepared to walk... Base: All staying overnight 2015 (217), 2014 (112)

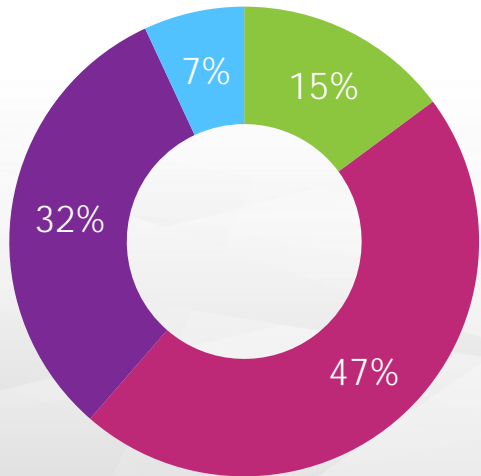


# Most visitors staying overnight travelled with medium or small sized luggage

Those from outside of the UK were more likely to carry large/heavy luggage

Size of luggage

■ Heavy luggage ■ Medium ■ Small ■ No luggage



**Buckingham Gate (22%), British Museum (21%) and the London Eye (25%) had the most visitors with heavy luggage**



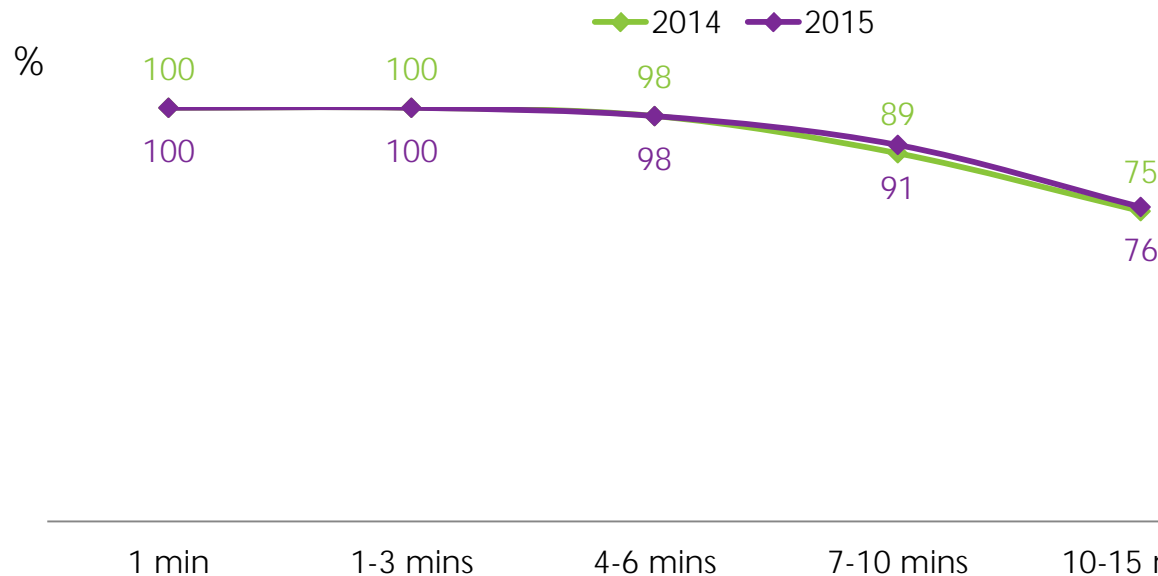
B3 How would you describe the luggage that you need to take between the coach and your hotel? Base: All staying overnight (217)



# The majority would be willing to wait up to 10 minutes to be picked up from a hotel or an attraction

In line with 2014, while participants are willing to wait for up to 10 minutes to be picked up, the proportion willing to wait 10 to 15 minutes is lower

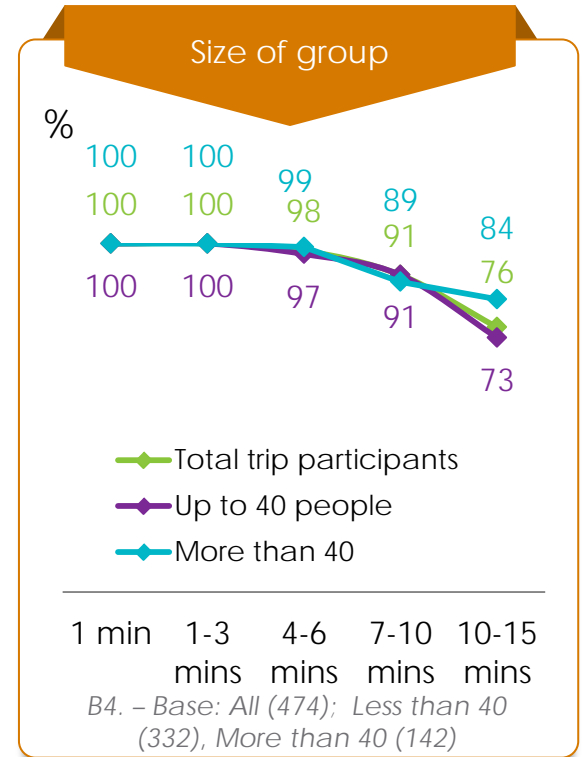
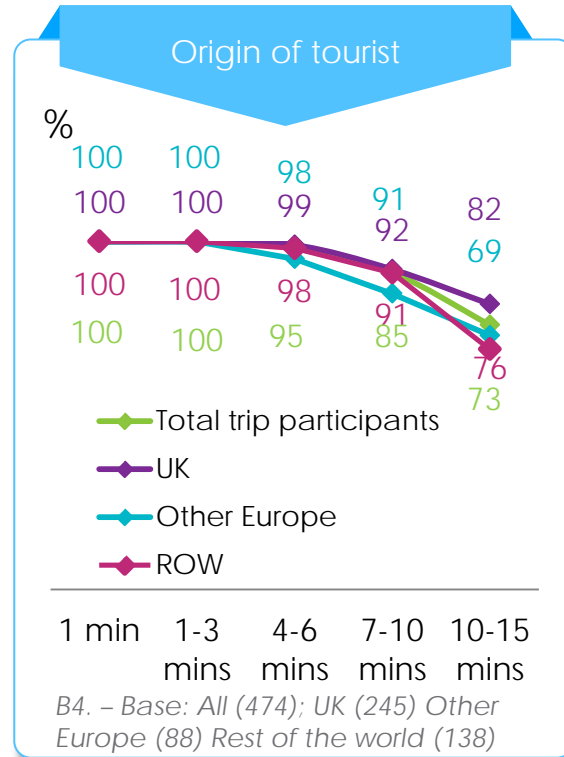
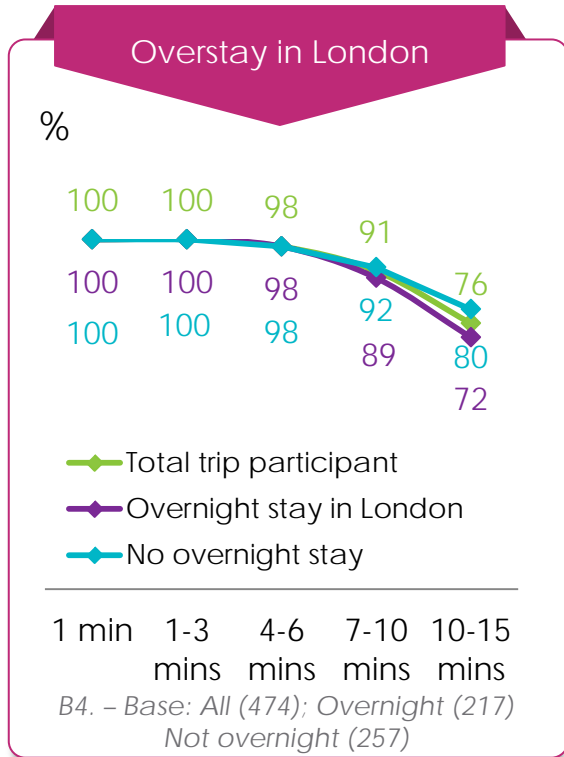
Time willing to wait to be picked up from a venue/attraction/hotel



B4. Thinking now about the time that you would be willing to wait for the coach to collect you or pick you up from an attraction you are visiting, your hotel or a theatre in London...would you be prepared to wait... Base: All 2015 (474); 2014 (231)

# Some groups show greater willingness to wait

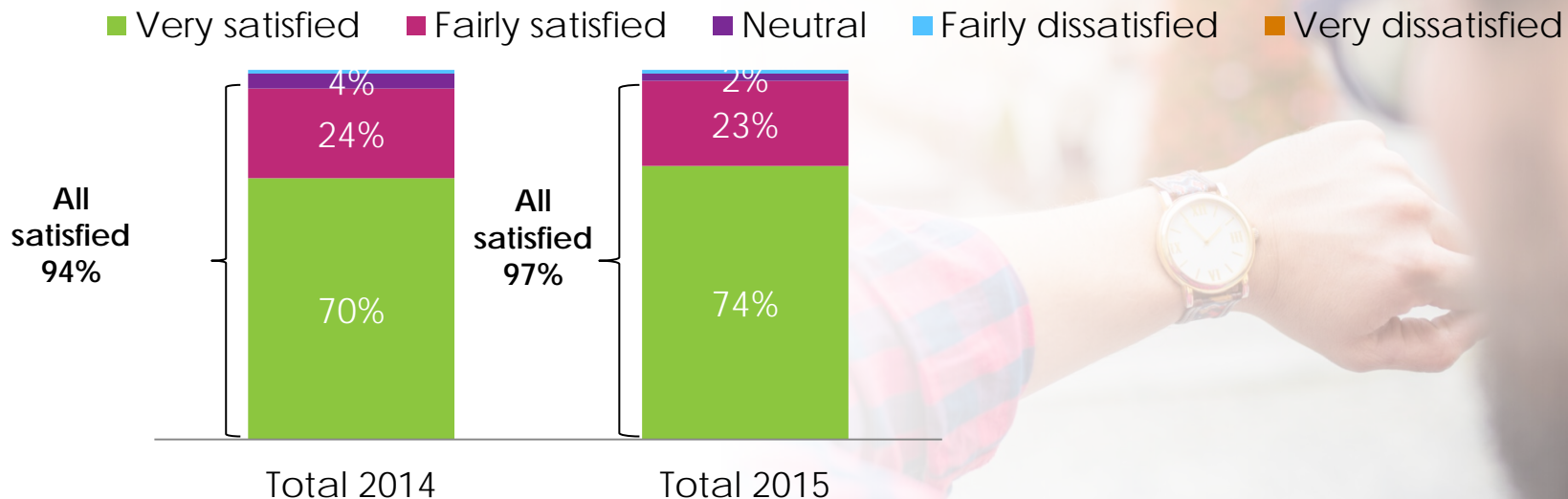
Day trippers, UK residents and those in larger groups are more prepared to wait to be picked up from a venue or hotel



# Visitors show a very high level of satisfaction with their experience in London

Satisfaction levels with the waiting time for the coach and the distance walked between the coach and venues continue to be high across all groups

Satisfaction with waiting/walking times



B8 Thinking about your trip so far, how satisfied are you with the amount of time you have needed to wait for your coach, and how far you have had to walk between your coach and the venues you have been to? Base: All 2015 (474); 2014 (231)

The image features a solid teal background. At the top, there are white geometric shapes: a large arrow pointing right, followed by a diamond shape, and another large arrow pointing right. The text "Experience of coach trips" is centered in the lower half of the image in a white, sans-serif font.

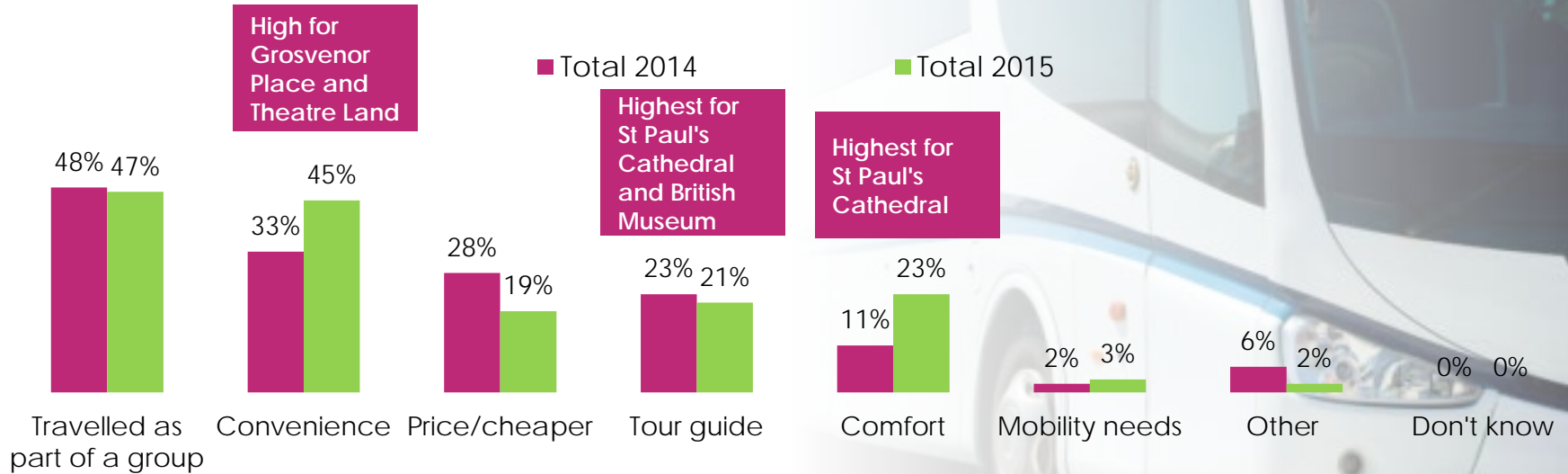
Experience of coach trips



# Travelling as part of a group and convenience remain the top reasons for travelling by coach to Central London

2015 sees a significant increase in the proportion of visitors choosing a coach over other modes of transport for convenience. Similarly, comfort is more likely to be a factor this year compared to 2014. In 2014, price was highlighted as more of a deciding factor than it is this year

Reasons for choosing to travel by coach



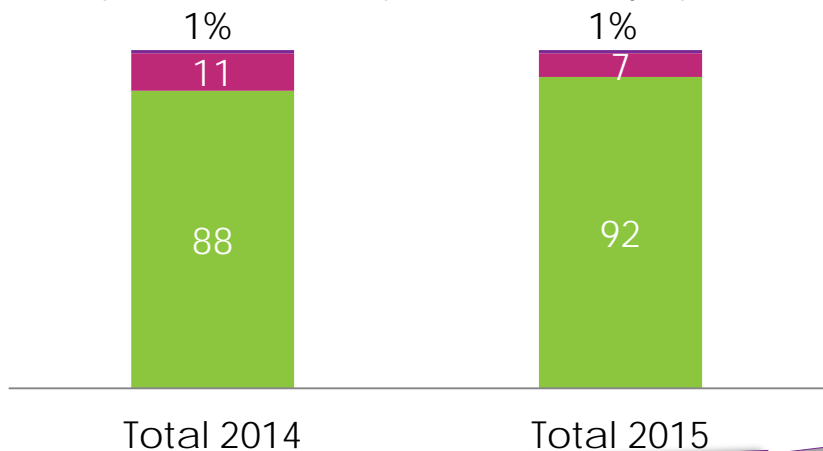
A4. Why did you use the coach rather than other means of transport for this visit? Base: All 2015 (474); 2014 (231)

# For the majority, the trip experience was problem free

2015 sees a directional drop in visitors reporting any problems with their drop off or pick up location. The few experiencing a minor problem highlight traffic/congestion as the main issue

## Experience of any problems

■ No problem ■ Minor problems ■ Major problems



## Nature of problems-2015

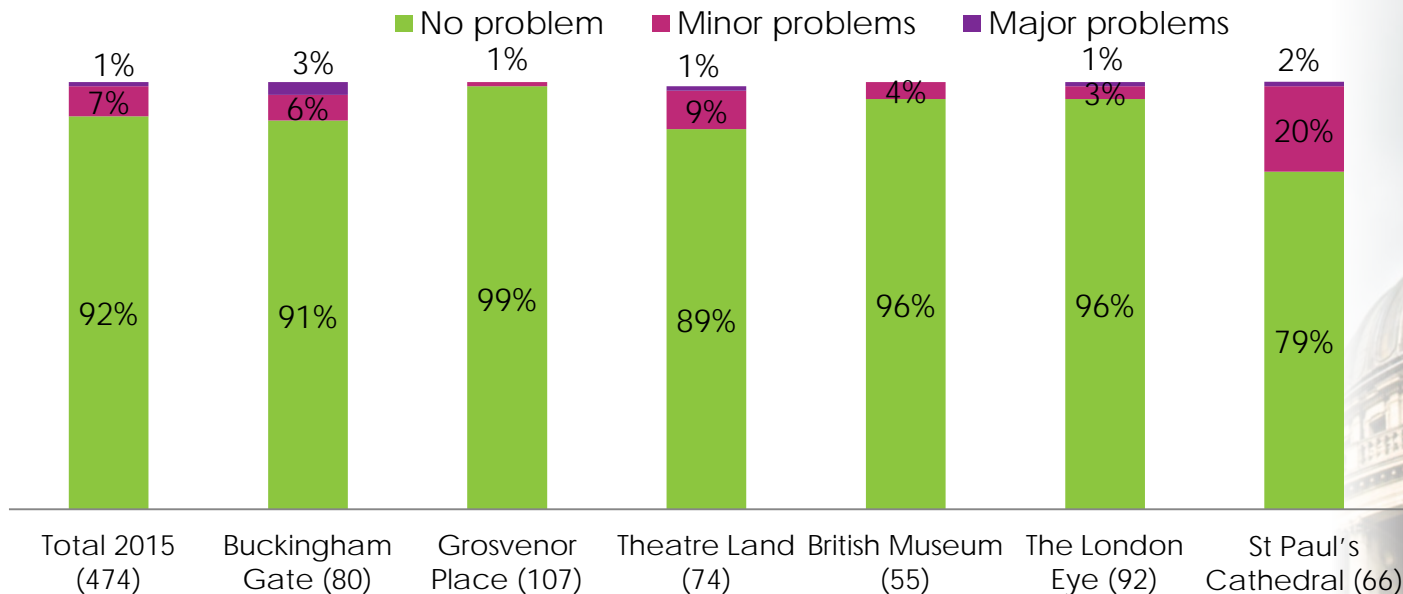
	Base	%
Traffic/congestion	11	31%
Parking issues	5	14%
Waiting for other members of party to arrive	5	14%
Could not find where coach was located	4	11%
Road works/closures	3	8%
Poor information	3	8%
Delays	3	8%

B5 In terms of getting to or from attractions or venues you're visiting and your coach, have any of the drop off/pick up locations caused you any difficulties? Base: All 2015 (474); 2014 (231)

B6 What problems did you experience? Base: All experiencing problems (36)

# Visitors to St Paul's are more likely to experience minor problems e.g. traffic/congestion, parking issues

Experience of any problems



B5 In terms of getting to or from attractions or venues you're visiting and your coach, have any of the drop off/pick up locations caused you any difficulties? Base: All (474)

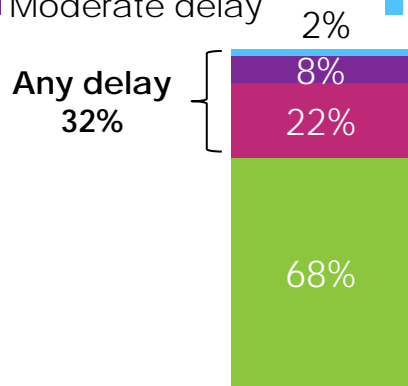


# Although traffic delays experienced tend to be minor, trip participants are being inconvenienced

The highest proportion of delays were experienced by visitors in the St Paul's Cathedral area

Delays

- No delays
- Minor delays
- Moderate delay
- Major delay



Total 2015

Any delay

	Base	%
St Paul's Cathedral	66	50%
Buckingham Gate	80	36%
British Museum	55	35%
The London Eye	92	34%
Theatre Land	74	31%
Grosvenor Place	107	15%

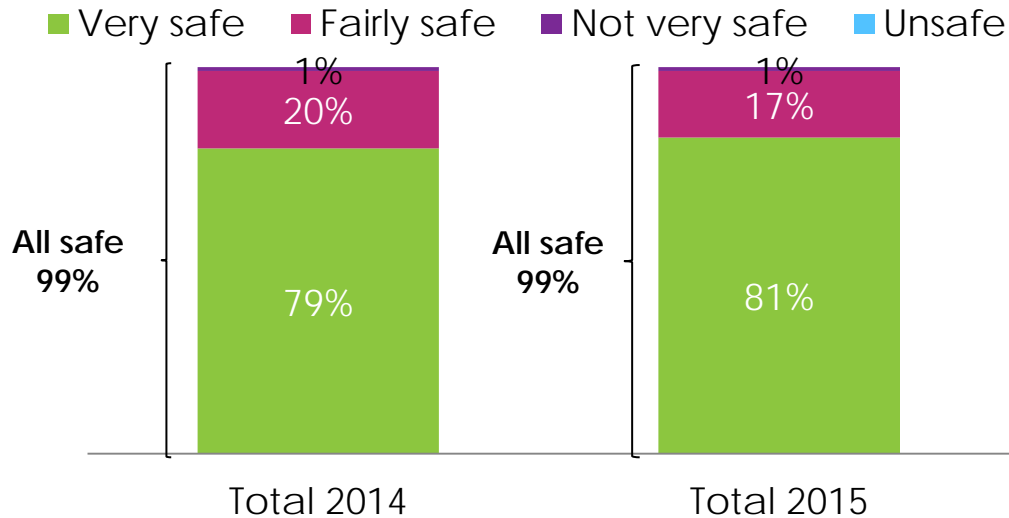
B9 Thinking about your coach trip overall, have you been inconvenienced within central London due to traffic delays when you were on board the coach? Base: All (474)



# Virtually all find the drop off and pick up location safe

Perceptions of safety are consistent across all groups

Perceptions of safety



Only 1% feel unsafe, reasons given include:

"Very congested with traffic"

"Pickpockets around"

"Nowhere to cross road"

"Had to walk in road" as we got off

B7a In your opinion how safe was the location where the coach dropped you off or is planning to pick you up for this particular attraction? Base: All 2015 (474); 2014 (229)



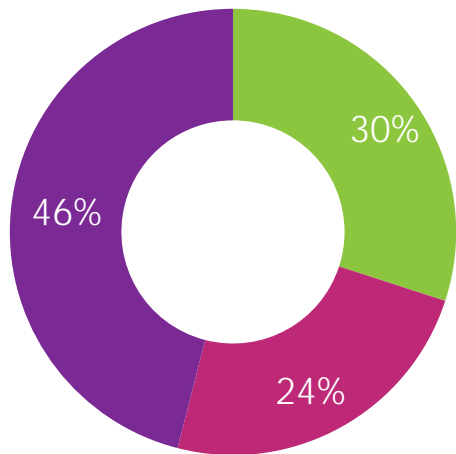
Legible London

# Exposure to Legible London maps stands at over half

While exposure to Legible London is not universal; it is worth noting that some trip participants would not have been on the look out for way finding materials as they were on a group visit. The highest use is reported by visitors in the British Museum and St Paul's Cathedral areas

## Legible London

- Used maps for way-finding
- Noticed maps but did not use
- Neither used nor noticed



	British Museum (Base-55)	St Paul's Cathedral (Base-66)	The London Eye (Base-92)	Buckingham Gate (Base-80)	Theatre Land (Base-74)	Grosvenor Place (Base-107)
Used	45%	45%	38%	25%	22%	13%
Noticed	24%	26%	20%	23%	23%	30%
Neither	31%	29%	42%	53%	55%	57%

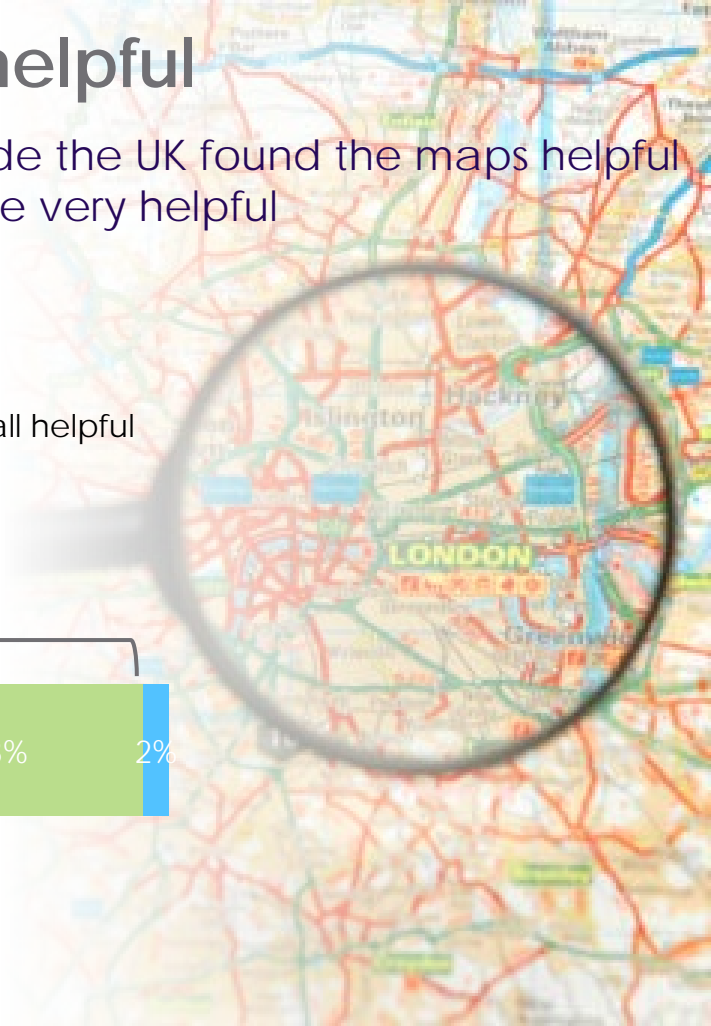
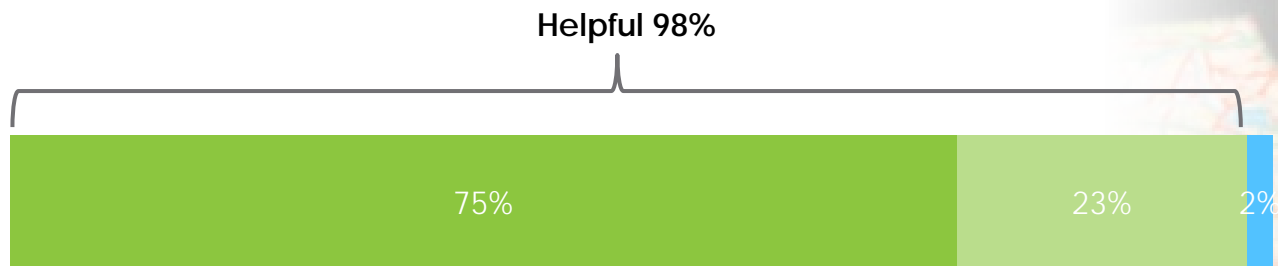
C1 Around London there are maps with information for visitors. Have you used these maps to help you find your way around London? Base: All (474)



# Virtually all using a map found it helpful

Both trip participants from the UK and those from outside the UK found the maps helpful for finding their way around; with most saying they were very helpful

■ Very helpful   ■ Fairly helpful   ■ Not very helpful   ■ Not at all helpful



C2 How helpful were they for you in finding your way around? Base using Legible London maps: Base: All using Legible London (140)





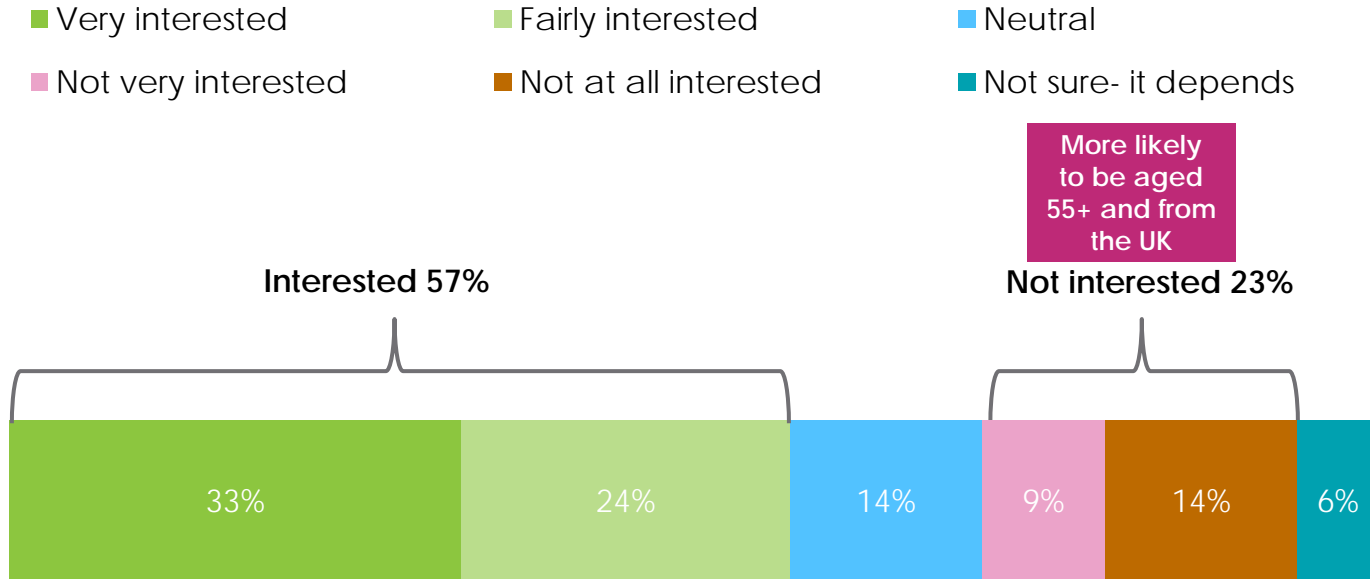


Park & Glide



# The Park and Glide concept has appeal to visitors

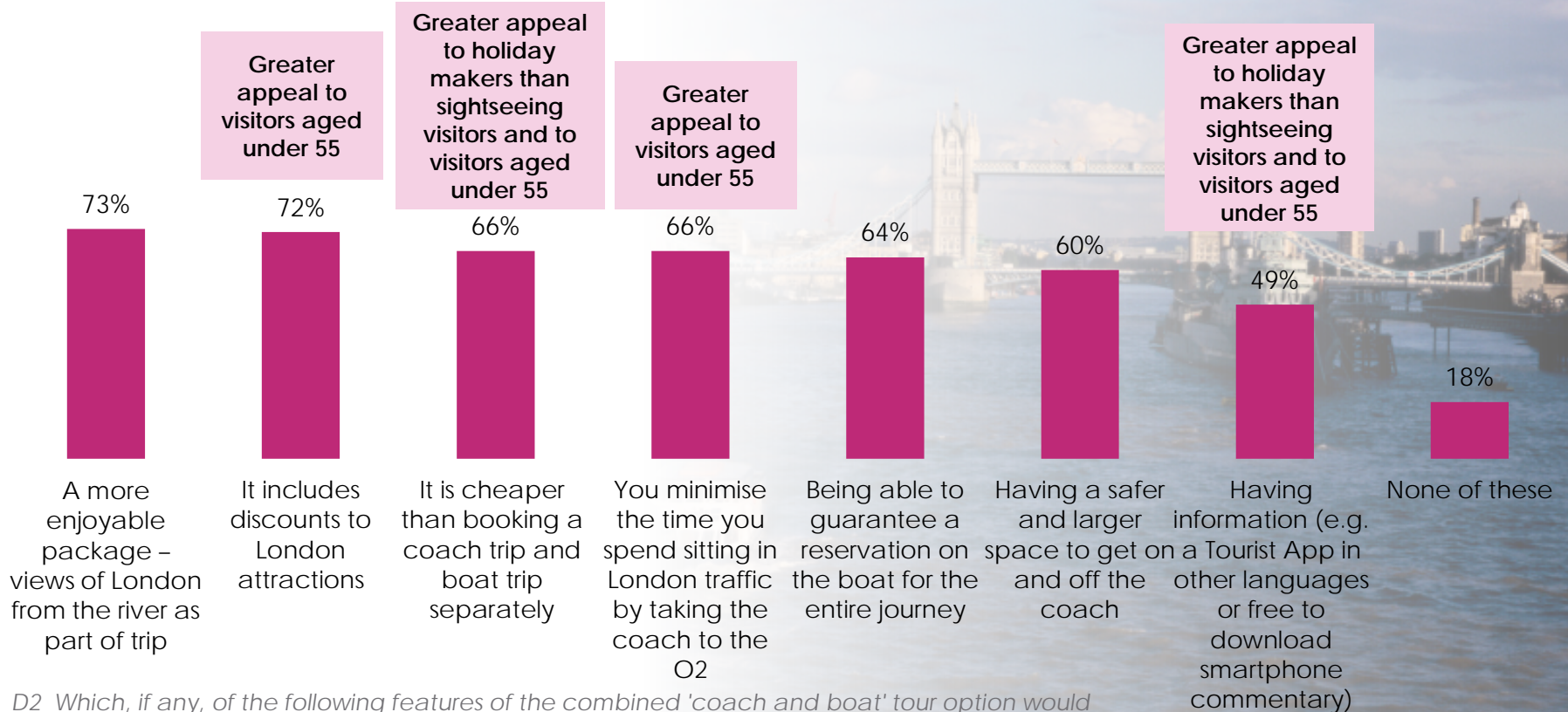
Just a quarter indicate they would be not interested in the concept



**Park and Glide concept:**  
Coaches like the one you took today have an option to park in at the O2 venue in North Greenwich, in East London, so visitors can continue their trip into Central London by River Boat which takes 25 minutes. If this option were available to you for a future trip to London, how interested would you be in taking it?

D1 If this option were available to you for a future trip to London, how interested would you be in taking it?: Base: All (474)

# The many features of the Park and Glide concept have appeal to visitors



D2 Which, if any, of the following features of the combined 'coach and boat' tour option would make it more attractive to you?: Base: All (474)

The image features a solid teal background. At the top, there are white geometric shapes: a large triangle on the left pointing right, and a diamond shape on the right. The word "Summary" is centered in the lower half of the image in a white, serif font.

# Summary



# Summary

## Walking & waiting time

Optimum time for walking:

- No longer than 10 minutes to a venue or attraction
- No more than 6 minutes to/from accommodation
- The majority are willing to wait for up to 10 minutes to be collected or picked up from an attraction or their hotel accommodation

## Experience

Most visitors have a positive experience in the Capital:

- Few experienced any problems with the drop off or pick up locations
- Some minor traffic delays inconvenienced some visitors, particularly those in the St Paul's Cathedral area
- Perceptions of safety continue to be high; with virtually all feeling safe at the drop off/pick up location

## Legible London

Legible London was used by a third of visitors and nearly all these found it helpful

## Park and Glide

The Park and Glide concept appeals to visitors

- Only 14% say they are not at all interested
- The concept features also resonate well with visitors



# Appendix



# Visitor profile

## All trip participants

	2014	2015
Base:	231	474
<b>Region</b>		
London (within M25)	5%	3%
Rest of UK	29%	49%
Other Europe	32%	19%
Outside Europe	35%	30%
<b>Age</b>		
16-24 years	38%	17%
25-54 years	44%	33%
55+ years	18%	50%
<b>Disability</b>		
Yes	6%	14%
No	93%	86%

## All trip participants

	2014	2015
<b>Number of people on coach</b>		
Up to 40 people	58%	70%
More than 40 people	42%	30%
<b>Traveling with kids</b>		
Net: Yes	39%	23%
No	60%	67%
<b>Gender</b>		
Male	41%	38%
Female	59%	62%
<b>Reason for visit to London</b>		
Sight seeing	68%	83%
Holiday	20%	18%
Theatre	3%	4%
Education	30%	6%
Shopping	10%	5%

The logo for Future Thinking is set against a magenta background. It features a large white arrow pointing left, with the word "future" in a white sans-serif font above the word "thinking" in a larger white sans-serif font. The letter 'f' in "future" is stylized with a white arrow pointing right.

# future thinking

## Main Contacts

Joy Mhonda, Associate Director  
[Joy.mhonda@futurethinking.com](mailto:Joy.mhonda@futurethinking.com)

+44(0) 207 843 9777

