Department for Transport

Dynamic surveying for aviation:
Foreign residents and surface access

This document presents the results of a set of questions which were dynamically added to the Civil Aviation Authority (CAA) Departing Passenger Survey for the first quarter of 2018. This set of questions focused specifically on passengers using UK airports that were foreign residents and the surface access options that were used and researched.

The term **surface access** relates to the mode of transport used for journeys passengers make between an airport and their ultimate point of origin or destination on the ground.

Executive Summary: Headline findings

Journey purpose

- From the foreign resident passengers surveyed, just over 40% of passengers were travelling for the purpose of visiting friends and relatives. Unlike other airports, London City saw the majority of its passengers travelling for business, whilst 30% of passengers at Stansted were travelling for a holiday.

Surface access choice

- Just over half of all foreign residents surveyed were found to have reached their UK destination on arrival by public transport, with high proportions experienced at Gatwick and Stansted due to popularity of rail usage at these airports. Passengers travelling for holiday were also much more likely to use public transport.

Surface access information

- Foreign residents were commonly found to research their surface access options through general internet searching, although an almost equivalent amount stated that they didn't require any information to organise their travel. The method of research was also found to vary according to the purpose of travel, with business passengers more likely to consult work colleagues and those visiting friends and relatives more likely to use their friends and family for information.

- The majority of foreign residents were found to conduct their research (where applicable) before arriving in the UK, with less than one in five doing so once they had arrived in the UK.

- Just under 90% of foreign residents were found to either be 'very satisfied' or 'satisfied' with the information they found. Dissatisfied passengers commonly cited topics surrounding rail, tube, coaches and price as factors in which they would like more information on in order to improve satisfaction.

About the survey

- The departing passenger survey is a survey that is undertaken to obtain information about air travellers and the determinants of the travel market. The surveys have included questions on journey purpose, final and intermediate surface origins/destinations, means of transport to and from airports, route flown, country of residence and purpose of travel.

- Surveys run on an annual basis, with interview shifts spread as evenly as practical throughout the year. A record of the flights sampled is regularly monitored to ensure that where possible all routes, and in most cases all flight numbers, are covered regularly.

- An interview usually lasts around 5–7 minutes, and involves around 30 questions being asked. Survey interviews take place at airport departure gates with information collected from passengers by a skilled interviewing field force. The interviews are then weighted to actual two-way traffic levels under the assumption that over the period, departing and arriving passengers will show the same characteristics.
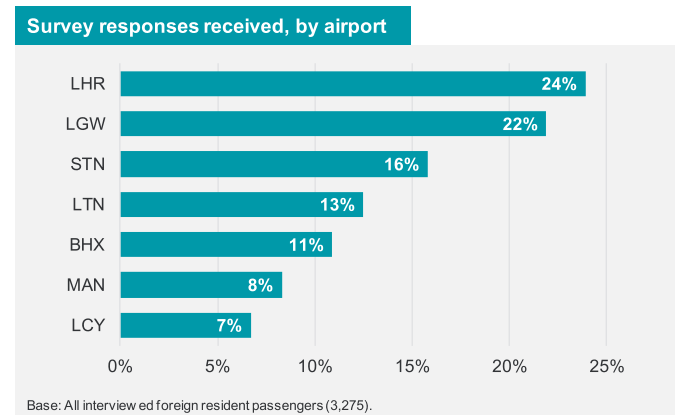
Sampling criteria

- This set of questions was applicable to any passenger that did not report the UK as the country that they had been living in the most over the previous 12 months.

- Passengers that were considered as international-international transfer passengers were excluded. That is, any passengers whose ultimate origin or destination was not in the UK was not chosen to be interviewed for this set of questions.

- The table on the right provides an example of air journeys that would meet the sampling criteria.

	Air Route In		Survey Airport		Air Route Out
☑			Heathrow	→	Domestic or International
☑	Domestic (e.g. Leeds Bradford)	→	Heathrow	→	Domestic (e.g. Edinburgh)
☑	Domestic (e.g. Manchester)	→	Heathrow	→	International (e.g. New York JFK)
☑	International (e.g. New York JFK)	→	Heathrow	→	Domestic (e.g. Edinburgh)
☒	International (e.g. New York JFK)	→	Heathrow	→	International (e.g. Dubai)

Survey airports

- This set of questions was implemented at 7 UK airports: **Heathrow (LHR)**, **Gatwick (LGW)**, **Manchester (MAN)**, **Stansted (STN)**, **Luton (LTN)**, **Birmingham (BHX)** and **London City (LCY)**.

- Each of the airports surveyed were found to have at least one-fifth of their passengers to be foreign residents in 2017, the highest proportion being received at Heathrow where over half of passengers

Survey responses received, by airport

Airport	%
LHR	24%
LGW	22%
STN	16%
LTN	13%
BHX	11%
MAN	8%
LCY	7%

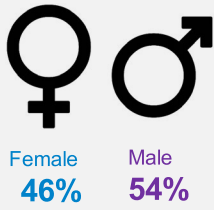Base: All interviewed foreign resident passengers (3,275).

Survey responses

- The passenger survey already has a well established sampling methodology which follows a stratified sampling design (stratified by carrier, route and quarter). A total of **3,275 interview responses** were received from a representative sample of passengers between 2nd January 2018 and 31st March 2018.

- It should be noted that this survey is posed to air passengers at the <u>departure</u> stage of an air journey from a UK airport. Questions relating to the arrival of the passengers have thus been asked through an appropriate framing of questions, e.g. "Thinking about when you arrived in the UK…".

- For the vast majority of occasions, passengers interviewed will be returning back to their main country of residence from the UK, expect for a few notable exceptions:

  - On a small number of instances, passengers interviewed will be making an entirely domestic air journey (e.g. as part of a multi-stage trip). In such instances, the questions posed would relate to the passengers' original air journey to the UK.

  - On a small number of instances, passengers interviewed may still be travelling to their final UK destination when interviewed. This is likely to happen to a small number of passengers arriving from an international location and when interviewed are about to take a connecting flight to another UK airport.
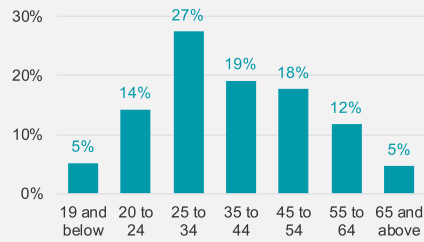
Sample profile

Gender

Gender of passengers surveyed

Female
46%

Male
54%

Base All interviewed foreign resident passengers (3,275)

Age

Age groups of passengers surveyed

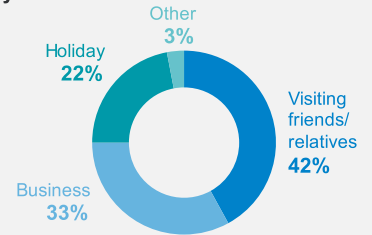| Age group	Percent
19 and below	5%
20 to 24	14%
25 to 34	27%
35 to 44	19%
45 to 54	18%
55 to 64	12%
65 and above	5%

Base All interviewed foreign resident passengers (3,275)
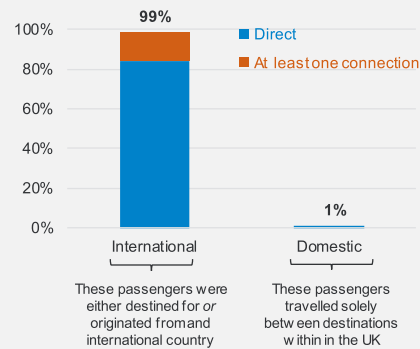Q Which of these age groups do you come into? (3,100 responses)

Purpose of travel

Main purpose of travel of passengers surveyed

- Other **3%**
- Holiday **22%**
- Visiting friends/relatives **42%**
- Business **33%**

Base All interviewed foreign resident passengers (3,275)
Q What is the chief purpose of your present trip?

Routes

Routes taken by foreign resident passengers surveyed

- International: **99%**
- Domestic: **1%**

Legend:
- Direct
- At least one connection

These passengers were either destined for *or* originated from and international country

These passengers travelled solely between destinations within in the UK

▶ The vast majority foreign residents surveyed were travelling to an international destination (99%) as would be expected. A large proportion of these passengers were making direct air journeys, with about 15% making at least one connection on route.

▶ Only a very small proportion of foreign residents were travelling on a journey that started and ended in the UK.

Base All interviewed foreign resident passengers (3,275)

Routes International origins/destinations

Origin/destination of international passengers surveyed

- Other Europe **10%**
- North America **10%**
- Rest of the World **12%**
- EU **68%**
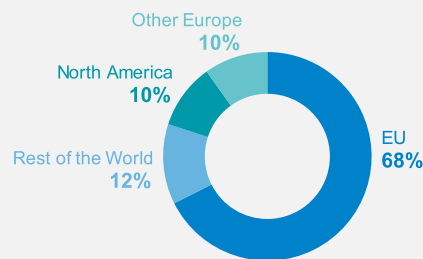
▶ Almost two thirds (68%) of international passengers were originating from/travelling to other EU countries. The most common choices of airports were Dublin, Amsterdam Schiphol, Madrid, Copenhagen and Barcelona.

▶ The most common destination airports for those travelling to/from non EU countries were Geneva, Zurich (which are predominantly travelling for business purposes) and Oslo.

Base Interviewed foreign resident passengers whose final destination or origin was an international location (3,230)
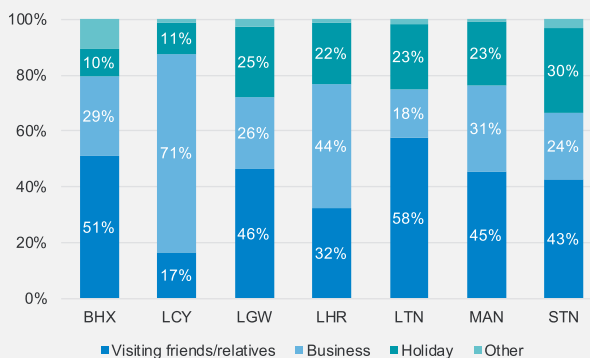
Routes Domestic origins/destinations

Origin/destination of domestic passengers surveyed

▶ All surveyed foreign resident passengers travelling domestically were doing so on direct air routes.

▶ Almost all passengers surveyed were travelling on routes either between England and Scotland or between England and Northern Ireland. The most common routes of surveyed passengers were:
  - Birmingham   Belfast International
  - Stansted   Belfast International
  - Birmingham   Belfast City
  - Stansted   Edinburgh
  - London City   Edinburgh

Base Interviewed foreign resident passengers whose origin and final destination was a UK location (45)

Purpose of travel at airports

Main purpose of travel for passengers surveyed, by airport

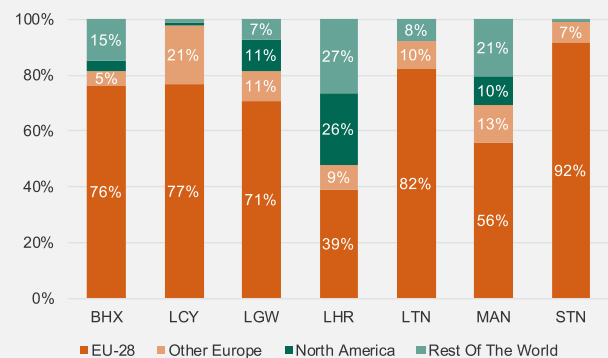| Airport	Visiting friends/relatives	Business	Holiday	Other
BHX	51%	29%	10%	
LCY	17%	71%	11%	
LGW	46%	26%	25%	
LHR	32%	44%	22%	
LTN	58%	18%	23%	
MAN	45%	31%	23%	
STN	43%	24%	30%	

▶ The main purpose of travel for foreign residents varies according to the airport surveyed. Unsurprisingly, London City attracted a high proportion of passengers travelling for business purposes (71%) given its proximity to the financial centre of London. Stansted saw the largest proportion of passengers travelling for holidays (30%), possibly due to the large presence of low cost carriers at the airport.

Base All interviewed foreign residence passengers (3,275) Q What s the chief purpose of your present trip?

International passengers at airports

Origin/destination of international passengers surveyed, by airport

Airport	EU-28	Other Europe	North America	Rest Of The World
BHX	76%	5%		15%
LCY	77%	21%		
LGW	71%	11%	11%	7%
LHR	39%	9%	26%	27%
LTN	82%	10%		8%
MAN	56%	13%	10%	21%
STN	92%			7%

▶ On the whole, international passengers surveyed were travelling to/from other EU countries. Notably, Heathrow differed when compared to other airports surveyed, with more passengers travelling to extra EU countries (61%) than EU countries (39%).

▶ Heathrow and Manchester saw the highest proportion of passengers travelling to/from countries outside of Europe and North America, mainly comprising of journeys to Russia and China.

Base Interviewed foreign resident passengers whose final destination or origin was an international location (3,230)

What surface access options do foreign residents use?

- Just over half (53%) of foreign residents were found to have reached their UK destination from their arrival airport by public transport with rail transport being the most common choice (31%). A quarter (25%) used either private or hire car transport to reach their destination.

- The surface access mode varied according to the purpose of travel with those visiting friends/relatives more likely to travel by car (43%), and those on holiday more likely to use public transportation (72%).

The choice of surface access mode has several determinant factors, including:

- Choice: the range of choice available to passengers varies considerably by airport, passengers travelling to/ from large urban airports generally benefit from greater choice compared with those using smaller airports or airports with poorer transport links.

- Transparency: the extent to which passengers are well informed about the options they have and their associated price.

- Residency: foreign residents are much less likely to have access to a privately owned vehicle, often having to opt for hire vehicles or utilising friends/relatives to provide 'kiss and fly' or pick-up transportation.

- There were notable differences observed in the choice of surface access options between individual airports:

  - Gatwick observed the highest proportion of foreign residents using rail (42%) whilst Stansted observed the highest proportion using bus/coach (30%). Both Gatwick and Stansted have over two-thirds of foreign residents reaching their destination by public transport, in part due to the dominance of rail usage at these airport.

  - Birmingham saw the largest proportion of foreign residents using some form of private or hire car transportation (50%) to reach their destination, followed by Manchester (44%) and Luton (37%).

  - Just under half of all passengers at London City (48%) were found to using the tube to reach their destination.

  - Taxi services were most typically used by foreign residents at Heathrow (32%) and London City (28%), which notably also experiences the highest proportions of business passengers from the airports surveyed.

Surface access mode used to reach destination

Other responses (3.4%):
- other modes of transport (e.g. cycling, walking)
- don't know
- no answer

Car **25.1%**
- Private car (19.4%)
- Hire car (5.7%)

Taxi/Minicab **19.3%**

Public transport **52.2%**
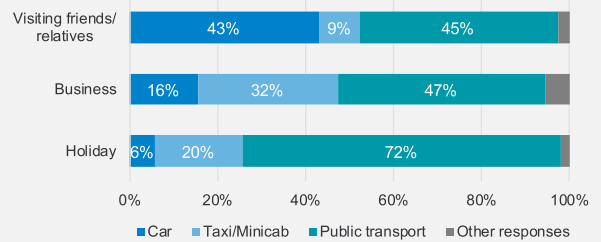- Rail (31.3%)
- Tube/Tram (10.8%)
- Bus/Coach (10.2%)

Base Interviewed foreign resident passengers with valid air journeys (3,265) Q Thinking about when you arrived in the UK, what was the main mode of travel you used to get from the UK airport to your destination?

Surface access mode used by main purpose of travel

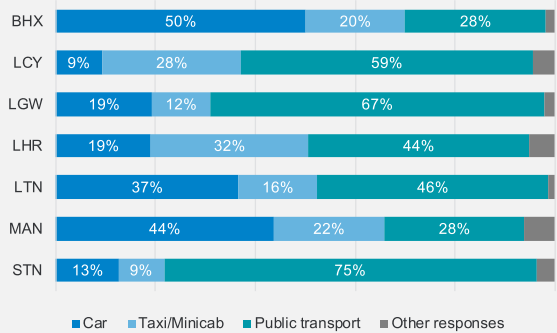|	Car	Taxi/Minicab	Public transport	Other responses
Visiting friends/relatives	43%	9%	45%	
Business	16%	32%	47%	
Holiday	6%	20%	72%	

Base Interviewed foreign resident passengers with valid air journeys (3,265) visiting friends/relatives (1,421), business (1,055) and holiday (694), other (95) not represented in this chart

Mode of transport used to reach destination, by airport

	Car	Taxi/Minicab	Public transport	Other responses
BHX	50%	20%	28%	
LCY	9%	28%	59%	
LGW	19%	12%	67%	
LHR	19%	32%	44%	
LTN	37%	16%	46%	
MAN	44%	22%	28%	
STN	13%	9%	75%	

Airport	Top two common modes	
Birmingham	Private Car (40.7%)	Rail (26 2%)
London City	Tube/Tram (47.6%)	Taxi/Minicab (27.7%)
Gatwick	Rail (56.7%)	Private Car (14.1%)
Heathrow	Taxi/Minicab (31 5%)	Tube/Tram (24.1%)
Luton	Private Car (31 5%)	Rail (23 2%)
Manchester	Private Car (27.1%)	Rail (24.4%)
Stansted	Rail (41.8%)	Bus/Coach (29.5%)

Base Interviewed foreign resident passengers with valid air journeys (3,265) Q Thinking about when you arrived in the UK, what was the main mode of travel you used to get from the UK airport to your destination?

How do foreign residents research their surface access options?

- Most foreign residents were found to use internet searching (29%) to obtain information about travel to their UK destination from the airport. It should be noted that such internet usage was directed at general searching (e.g. using a Google search) as opposed to directly targeting specific airport/airline websites. Although, it should be noted that general internet searching may lead passengers to an airport's website.

- An almost equivalent amount (28%) stated that they didn't require any information to organise their travel. This may be attributed to the following:

  - having a pre-determined surface access preference: some passengers will not research their surface access option if they have a preferred mode, e.g. business passengers choosing to take a taxi.

  - already being familiar with surface access options: some passengers such as British ex-pats, foreign students, and frequent travellers to the UK may already be very familiar with options and their preferences with regards to surface access, negating the need to do any research.

  - having surface access organised by others: passengers that are part of a tour group or package holiday may have already had their surface access pre-organised whilst those visiting friends/family may rely on them organising travel arrangements on their behalf.

- Consultation with friends and family (14%) and the use of a smartphone app (13%) such as Citymapper were the next most common responses.

Method of research used by foreign residents

- Other responses (airport website, information desk, airline) **6.3%**
- No answer **3.2%**
- Work colleagues **6.5%**
- General internet searching **29.3%**
- Smartphone app **12.9%**
- Friends and family **14.0%**
- Not applicable. I didn't need any information to organise my travel **27.9%**

Base All interviewed foreign resident passengers (3,275) Q Thinking about when you arrived in the UK, what was the primary source of information that you used to research your travel from the airport to your destination in the UK?

Method of research used by foreign residents, by purpose

	General internet searching	Not applicable	Friends and family	Smartphone app	Work colleagues	Other responses	Don't Know/ No Answer
Visiting friends/relatives	21.6%	38.2%	25.4%	7.3%			
Business	27.2%	27.2%	16.4%		17.0%		
Holiday	47.9%		10.7%	8.7%	17.4%		

Base All interviewed foreign resident passengers (3,275) visiting friends/relatives (1,425), business (1,061) and holiday (694), other (95) not represented in this chart Q Thinking about when you arrived in the UK, what was the primary source of information that you used to research your travel from the airport to your destination in the UK?
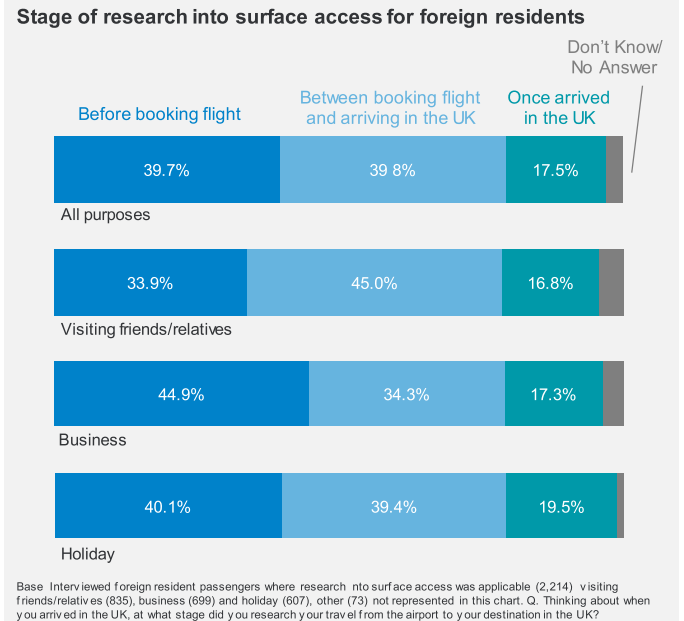
- The research method used by foreign residents varied according to the purpose of visit reported by the passenger.

- Those passengers visiting friends/relatives were more likely *not* to conduct any research (38%) on their surface access options and, unsurprisingly, were also much more likely to consult friends and family (25%) when considering travel to their destination.

- Business passengers were also much more likely to seek information from work colleagues (17%) when compared to passengers travelling for other purposes.

- Passengers travelling for a holiday were most likely to conduct some sort of research into surface access, with only 11% stating that research was "not applicable" to them. Just under half of holiday passengers (48%) relied on general internet searching.

- Both passengers travelling for business and holiday displayed a higher reliance on the use of a smartphone app (16% and 17% respectively) when compared to those visiting friends/relatives (7%).

When do foreign residents research their surface access options?

- The majority of foreign residents were found to conduct their research into surface access options (where applicable) before arriving in the UK (around 80%). Though there was some variation observed according to the main purpose of visited reported.

- In particular, business passengers were slightly more likely to conduct their research before booking a flight (45%) when compared to passengers travelling for other purposes. Given that business passengers may have a preference for ease and speed to reach their UK destination, the choice of surface access may be an important factor when considering booking air travel (especially where the five London airports surveyed can all provide access to greater London).

- Less than one in five (17.5%) were found to have investigated their surface access options once they had arrived in the UK (e.g. visiting airport information desks or using smartphone apps on arrival).

Stage of research into surface access for foreign residents

Don't Know/ No Answer

	Before booking flight	Between booking flight and arriving in the UK	Once arrived in the UK	
All purposes	39.7%	39.8%	17.5%	
Visiting friends/relatives	33.9%	45.0%	16.8%	
Business	44.9%	34.3%	17.3%	
Holiday	40.1%	39.4%	19.5%	

Base Interviewed foreign resident passengers where research nto surface access was applicable (2,214) visiting friends/relatives (835), business (699) and holiday (607), other (73) not represented in this chart. Q. Thinking about when you arrived in the UK, at what stage did you research your travel from the airport to your destination in the UK?

How satisfied are foreign residents with information on surface access in the UK?

- The majority (just under 90%) of foreign residents that conducted research into surface access to reach a UK destination were found to either be 'very satisfied' or 'satisfied' with the information they found.

- In comparison, just under 2% of foreign residents stated that they were either 'dissatisfied' or 'very dissatisfied'.

- When asked what additional information would have improved satisfaction with surface access information, several key themes can be identified from the responses received (based on free text responses).

Satisfaction with information on surface access

Neither satisfied nor dissatisfied

Very satisfied	Satisfied	
39.1%	50.1%	5.8%

Dissatisfied (1.3%)   Very dissatisfied (0.3%)   Don't Know/ No Answer (2.6%)

Base Interviewed foreign resident passengers where research nto surface access was applicable (2,214) Q How satisfied were you with the information that you had when organising travel from the UK airport to your destination in the UK?

- Responses largely stemmed around (1) clearer, easier and fuller access to information prior to arriving or (2) better information provided on arrival in the UK.
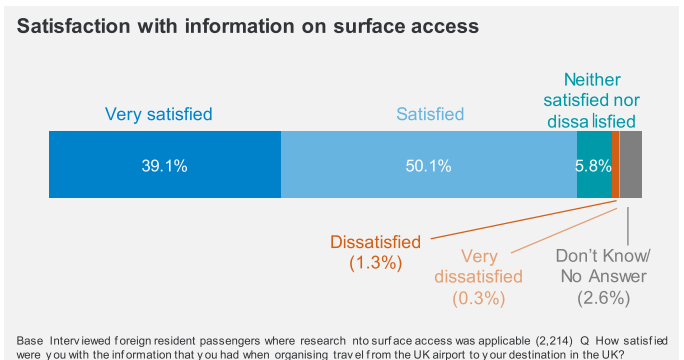
Rail
- Clearer information on train options, particularly on availability in early hours
- Easier access to train timetables
- Clearer information on ticketing fares and how to purchase tickets
- Early notifications when services are disrupted or cancelled, and alternative modes to use instead

Tube
- Clearer information on when first/last services are
- Information on what to do when late arrival causes the tube to not be running
- More leaflets/maps at stations
- More information on fares/oyster cards

Bus/Coach
- Better information on spare seats available on a coach
- Easier access to bus schedules and timetables
- Bus/coach office to be open 24 hours so that help/information is available

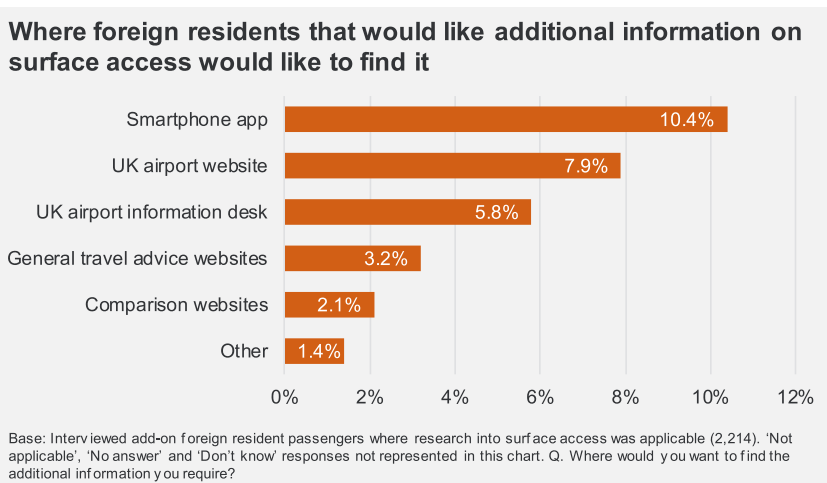| Airports	Price	Journey
• Improved signage from airport terminals to surface access options (e.g. way to platforms or taxi locations) • How to get to car hire services from airports • Information at airports to be more visible (e.g. more use of information on digital screens)	• Easier methods of finding prices and being able to compare (both within modes and across modes) • Easily being able to identify the cheapest option • More transparent pricing of bus, train and taxi fares • Ensure prices are consistent with what is advertised	• Information on journey times to allow for different modes • Road information (e.g. traffic updates and diversions in place) Q What additional information would have improved your satisfaction?

- A [CAA review of market conditions for surface access at UK airports](#) has highlighted several practices and circumstances that may be causing an apparent lack of information, and the considerations that should be taken into account to alleviate these. For example, price comparison websites can be a good way to help consumer compare between surface access operators, but only if complete information covering the whole market is provided.

- Whilst requiring additional information was not applicable to a large number of passengers surveyed, those that did commonly cited a smartphone app, UK airport website or airport information desk as places they would most like to find any additional information.

Where foreign residents that would like additional information on surface access would like to find it

Category	Percentage
Smartphone app	10.4%
UK airport website	7.9%
UK airport information desk	5.8%
General travel advice websites	3.2%
Comparison websites	2.1%
Other	1.4%

Base: Interviewed add-on foreign resident passengers where research into surface access was applicable (2,214). 'Not applicable', 'No answer' and 'Don't know' responses not represented in this chart. Q. Where would you want to find the additional information you require?

Technical information

- **Survey weighting:** Unless otherwise stated, the figures and analysis presented in this document are based on the weighted survey records. Further details regarding the methodology employed to apply weighting to the passenger survey are outlined by the [Civil Aviation Authority (CAA)](#).

- **Assumptions:** It is assumed that the same passenger will not be surveyed twice at different airports throughout an individual air journey. Such occurrences would only occur on passenger journeys where a connecting flight is being made at more than more of the airports surveyed as part of this survey module, and thus allowing an opportunity to be interviewed at a second airport on a departing flight. It should be noted that such instances are not likely to occur in practice.

- **Survey techniques:** All survey interviews conducted to both UK and foreign residents are conducted in English. Surveys are conducted by a team of skilled interviewers that have tools and techniques they can employ to extract the relevant information for survey questions where a passenger is not fully proficient in English.

- **Percentages:** Percentages quoted in the text and charts have been rounded to the nearest digit appropriately and so, in some cases, there may be an apparent discrepancy between the sum of the constituent items and the totals shown.