

Introduction of Parking Charges At Kirkwall, Stornoway and Sumburgh Airports: User Surveys

Report for



May 2018



About The Surveys

549 Face-to-Face Interviews

- Survey of individuals at airport terminals (landside):
 - * Kirkwall 205 interviews
 - * Stornoway 189
 - * Sumburgh 155
- Questionnaire designed by *Reference*, with HIAL input
- Interviewing by Progressive Partnership between April 20 and May 8
- Quotas-initial aim was 50% of the interviews to be with island residents who were catching a flight (c45% achieved)

17 Usable Self-Completion Surveys

- Cut down version of the face to face questionnaire
- Issued by HIAL when requested by individuals
- Nearly all (15) were from Shetland residents

Survey Analysis

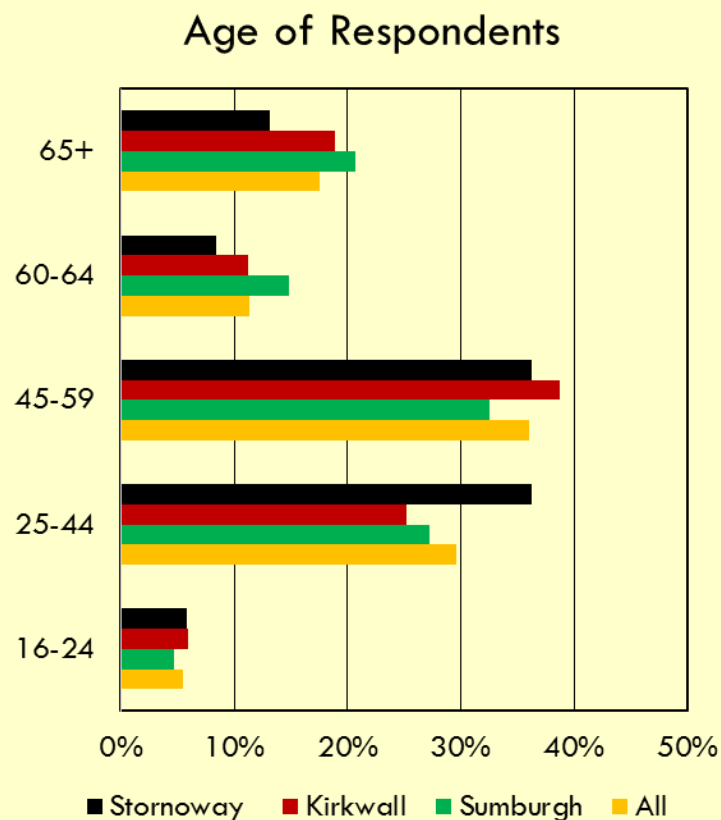
- Given their small number the self-completion surveys were combined with face to face ones for analysis
- Gives a broadly even spread of responses by airport:
 - * Kirkwall 206 (36%)
 - * Stornoway 190 (34%)
 - * Sumburgh 170 (30%)
- Results reported as a whole and analysis by airport where there are significant differences



Respondent Profile

Most respondents are island residents, Shetland sample has an older age profile

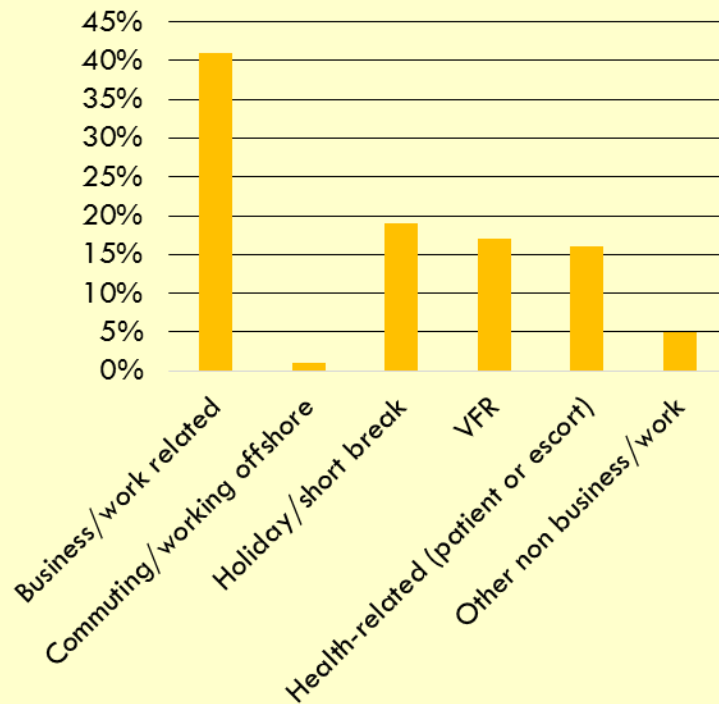
- 67% island residents, 33% visitors
- Even split between male and female
- 14% of interviewees and/or others in their party said they are Blue Badge scheme members



Base: All respondents

Around 40% of residents flying for business/work, 16% on health-related trips

Island residents: chief purpose of flight



○ Variation in business/work share:

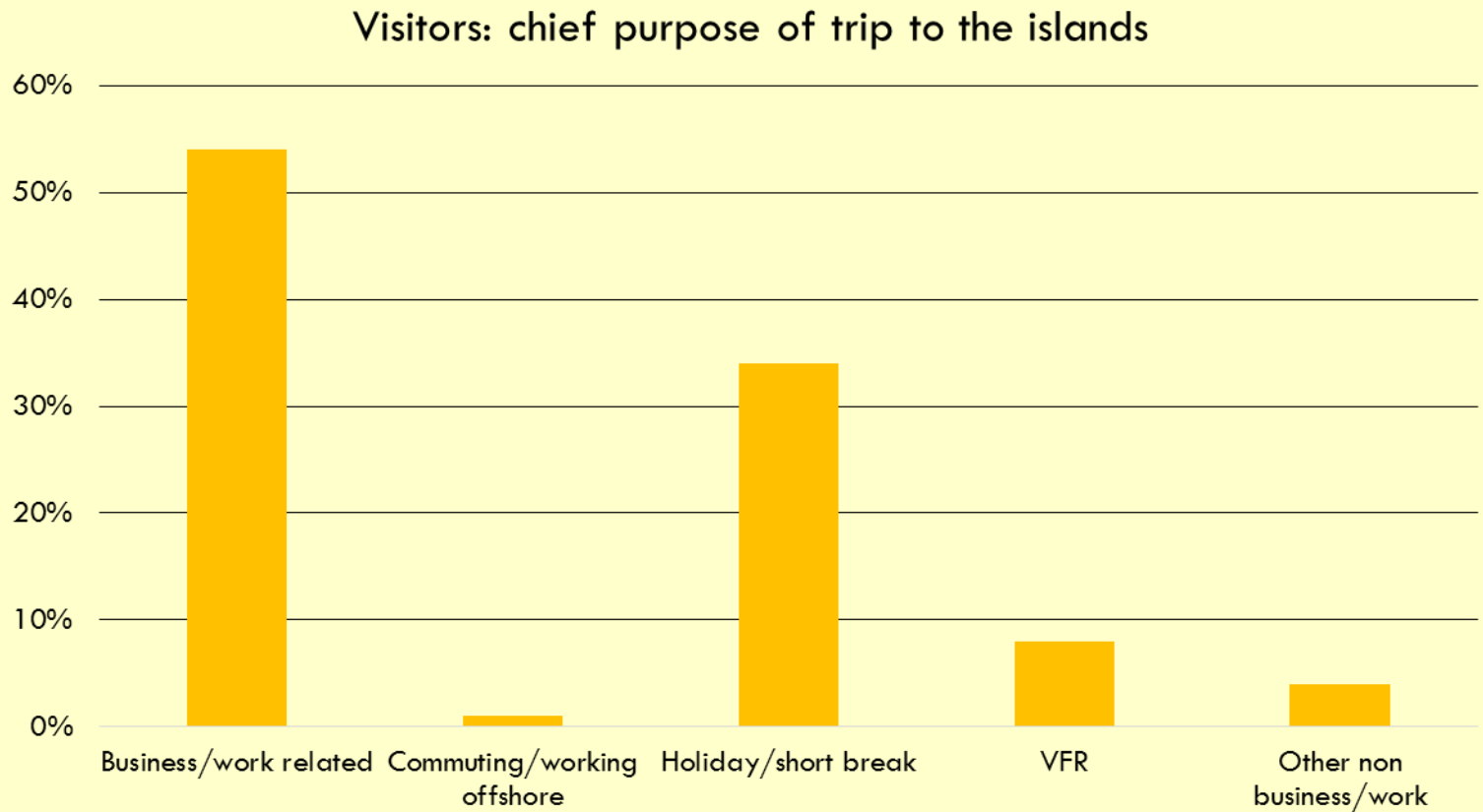
* Kirkwall 35%

* Sumburgh 45%

* Stornoway 47%

Base: All island residents interviewed at an airport who were catching a flight

Over half of visitors making a business/work trip, most others on a holiday/short break

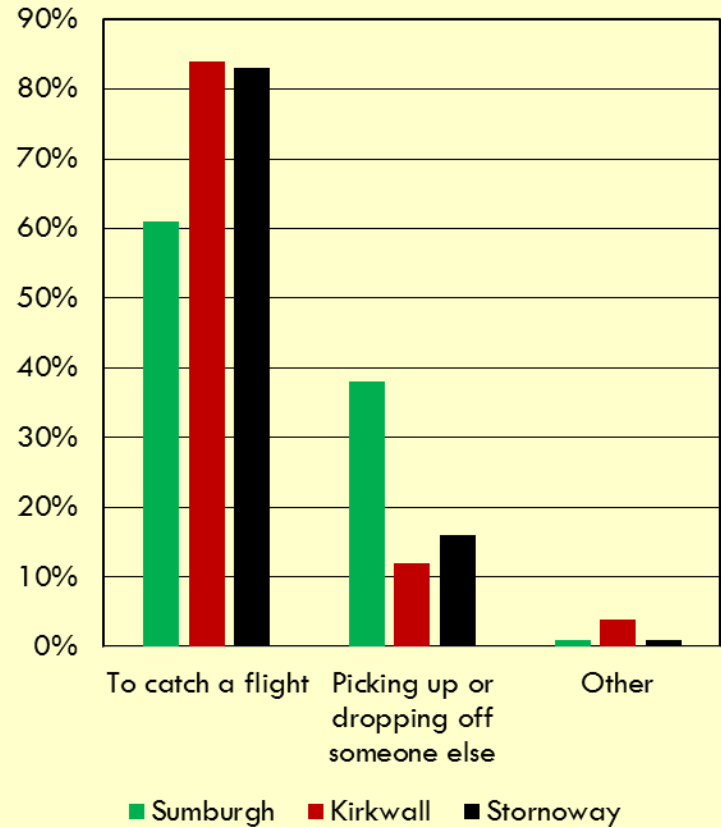
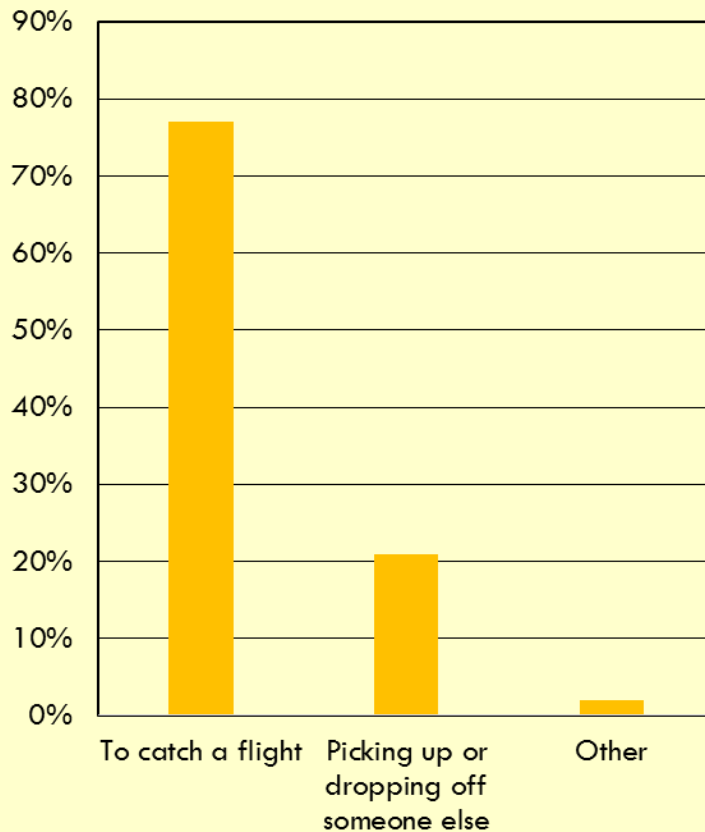


Base: All visitors interviewed at an airport who were catching a flight

Trips to The Airport

Over 75% of all interviewees were catching a flight, although only 60% were doing so at Sumburgh

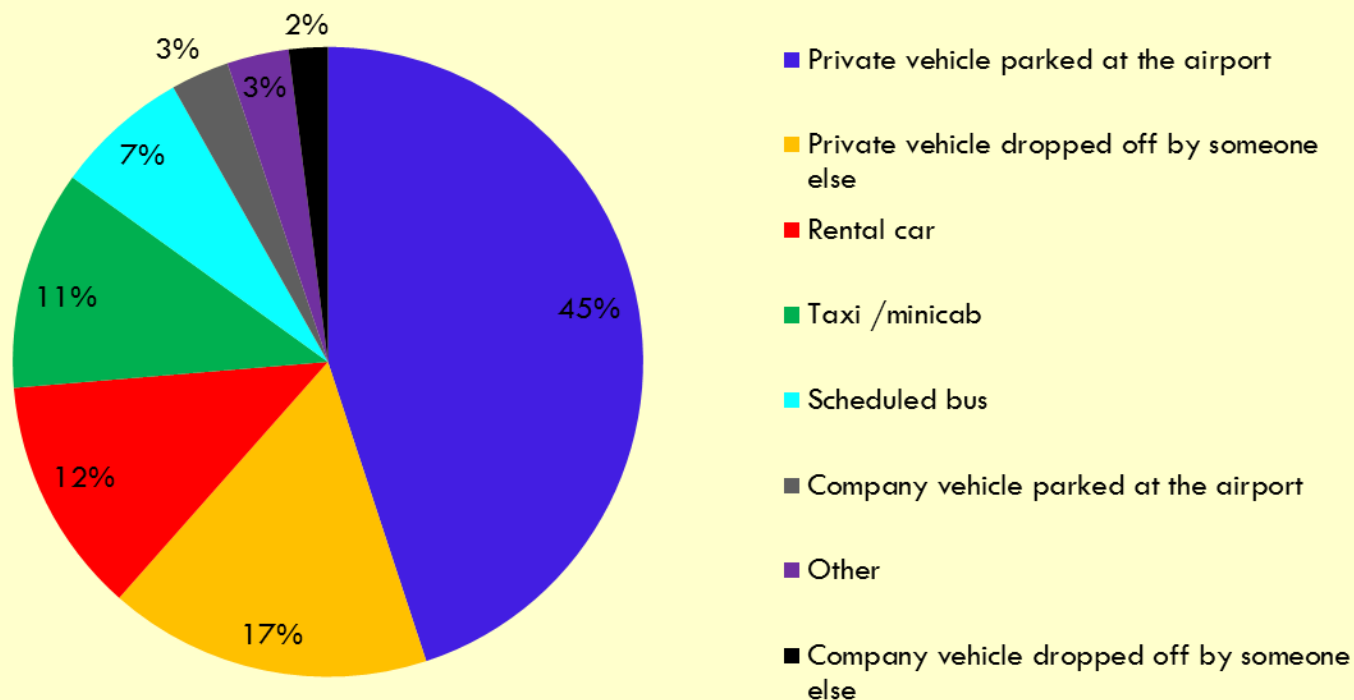
Why are you in the airport terminal today?



Base: All those interviewed at an airport

Private vehicle parked at the airport is main transport mode, less than 20% use taxi or bus

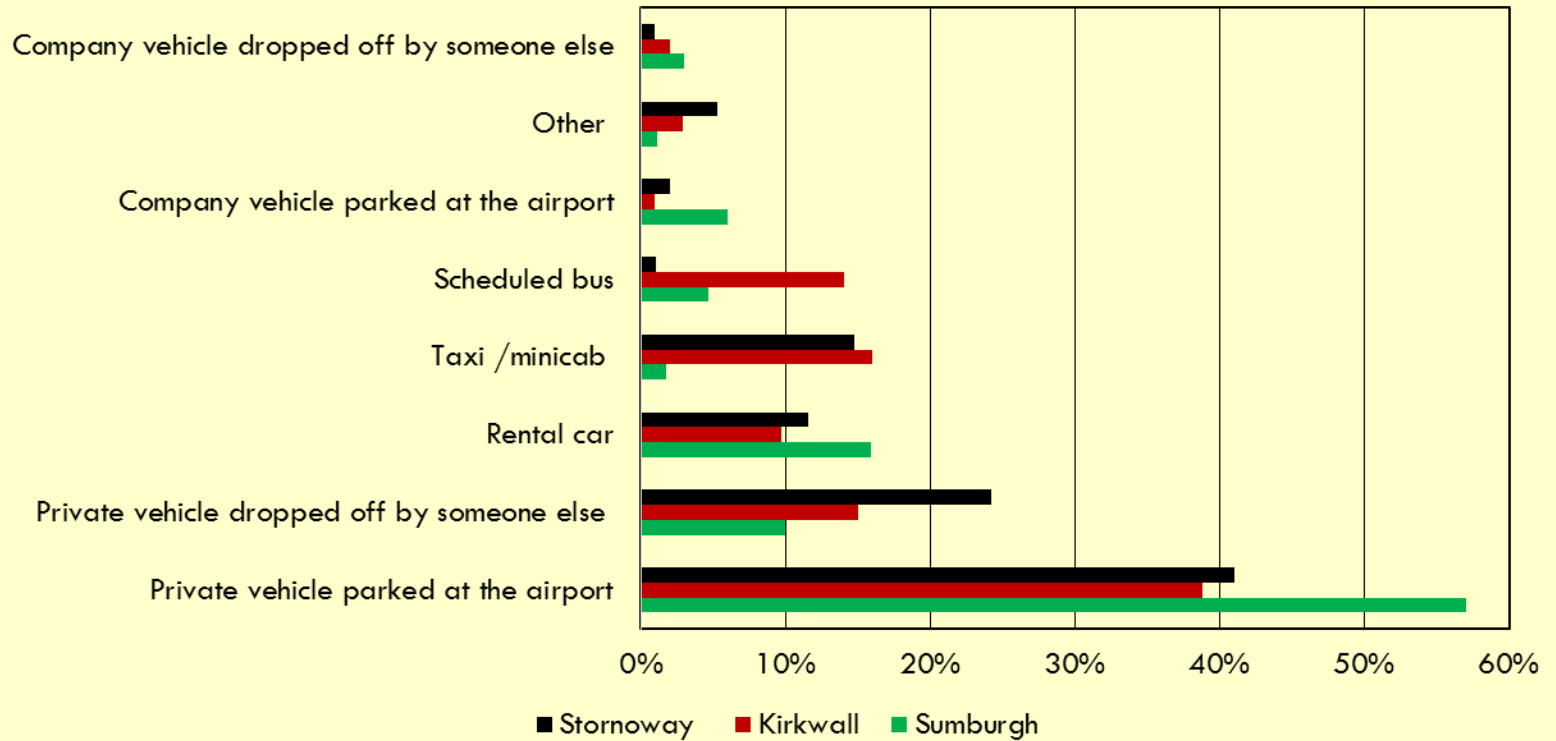
Form of transport used to travel to airport



Base: All respondents

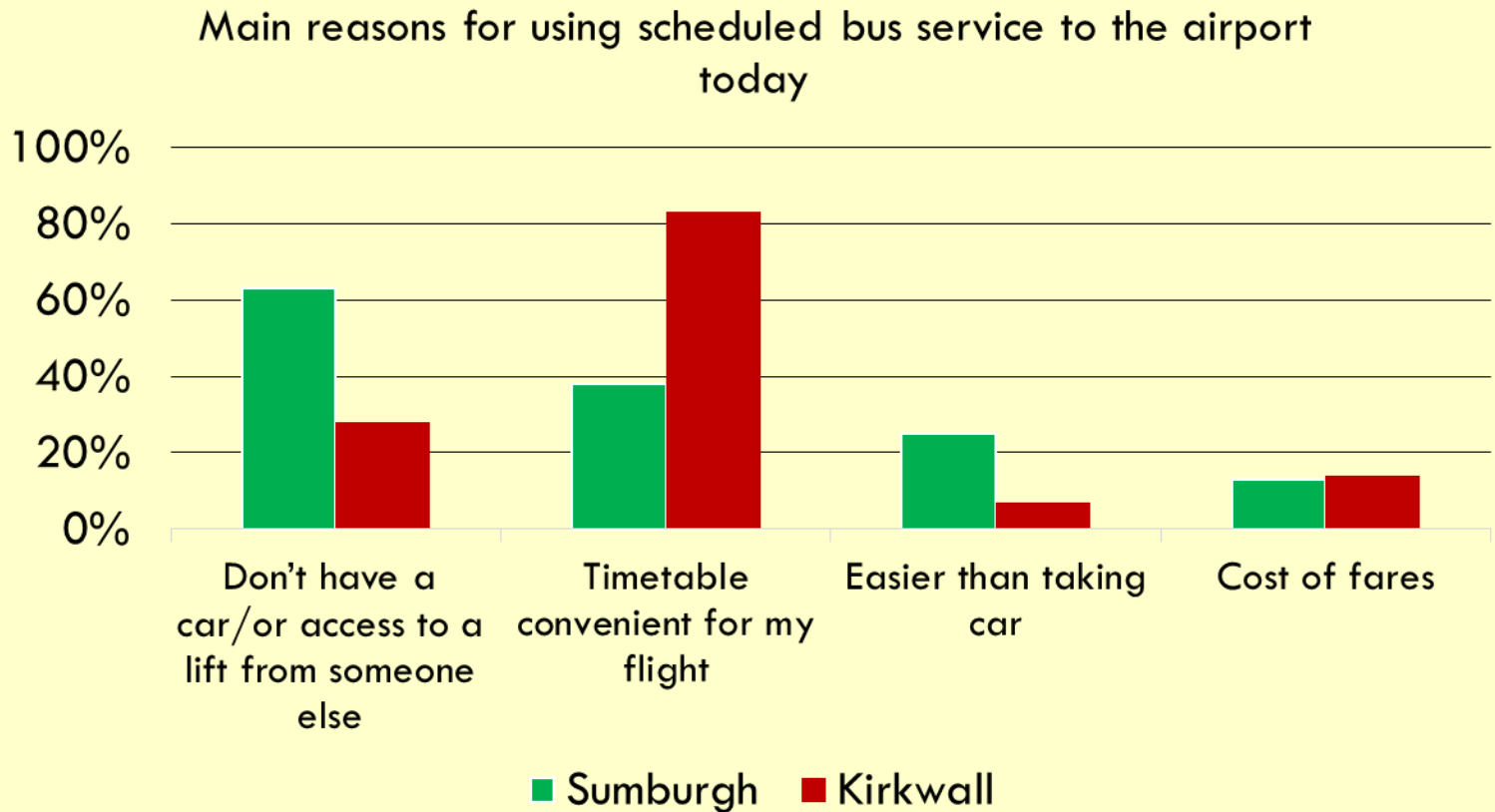
More than half parked a private vehicle at Sumburgh, but very few use taxi-or bus (as at Stornoway)

Form of transport used to travel to airport



Base: All respondents

Convenient timetable drives demand for Kirkwall bus service, lack of alternative is key for Sumburgh users



Base: All airport interviewees who used the scheduled bus to travel to the airport. Multiple responses allowed. Main responses shown. Only two Stornoway passengers used the bus service so responses not shown

Convenience main underlying reason for not using bus, but unsuitable timings rule the bus out for vast majority at Stornoway

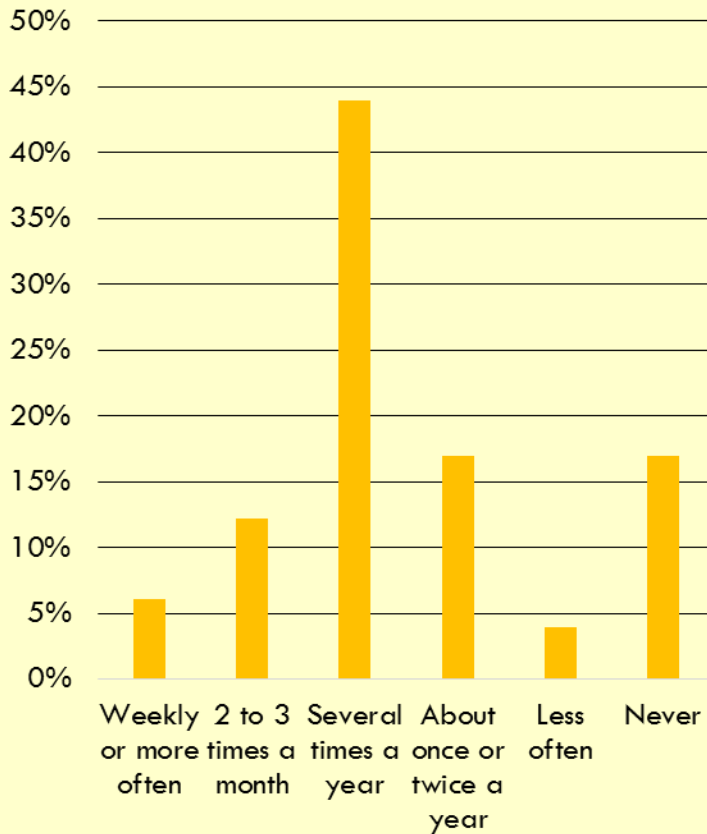
Main reasons for not using scheduled bus service to the airport today

<u>Reason</u>	<u>Sumburgh</u>	<u>Kirkwall</u>	<u>Stornoway</u>
There is no bus service	25%	5%	85%
Car more convenient	31%	40%	11%
Bus timetable not convenient for my flight	24%	20%	0%
Had a hire car	16%	11%	10%
Bus route inconvenient	16%	20%	0%
Dropping off or collecting someone at airport	18%	4%	0%

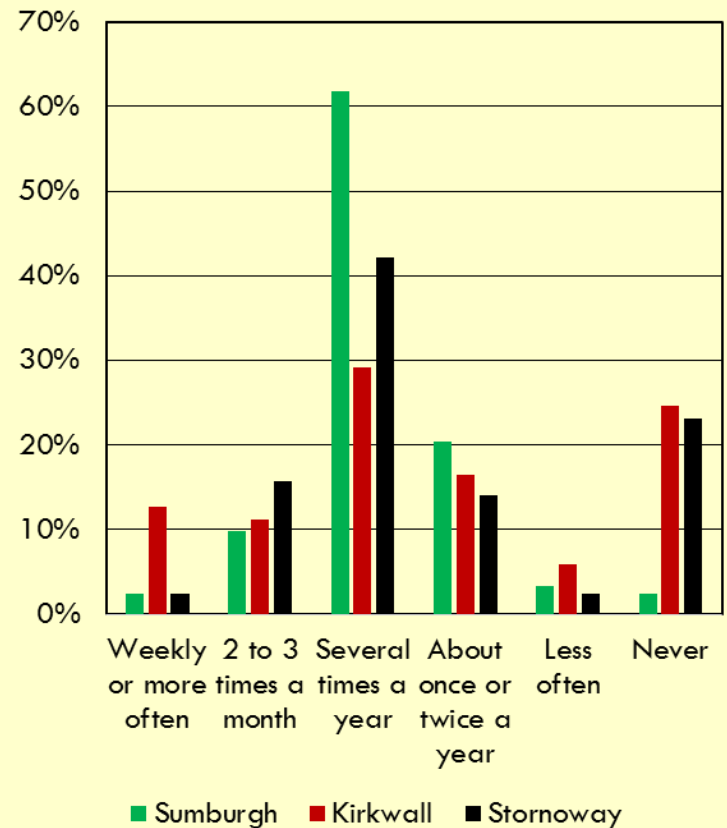
Base: All airport interviewees who had travelled to the airport on a mode other than scheduled bus.
Multiple responses allowed. Main responses shown. The bus service that calls at Stornoway airport is not timed to connect with flights

Most park at the airport several times a year, Kirkwall sample either very frequent or very occasional parkers

How often do you park in the airport car park?

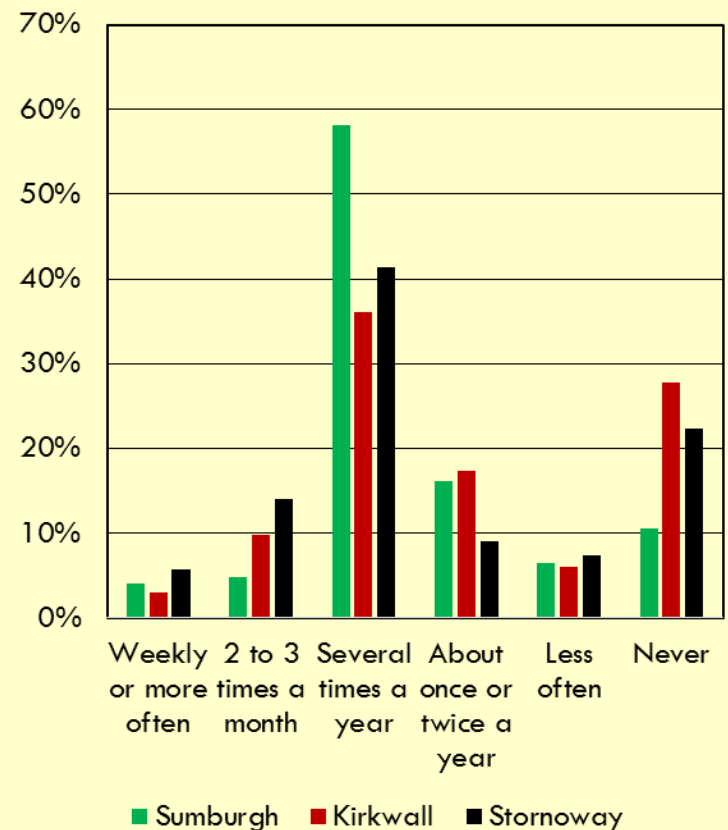
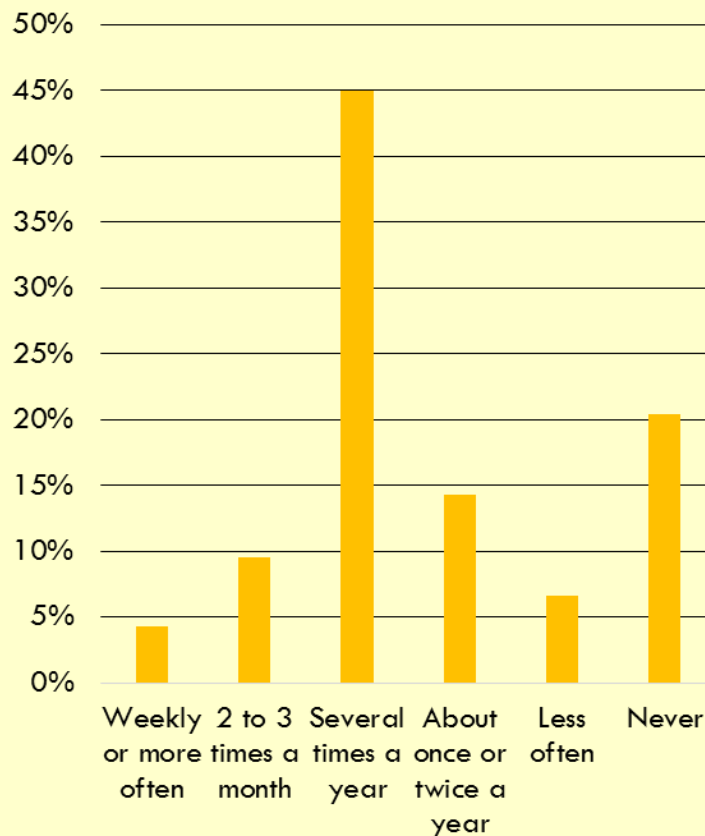


Base: All island residents



Most drop off/pick up several times a year, Shetland sample more likely to do so at least once a year

How often do you drop off or collect people at the airport?



Base: All island residents

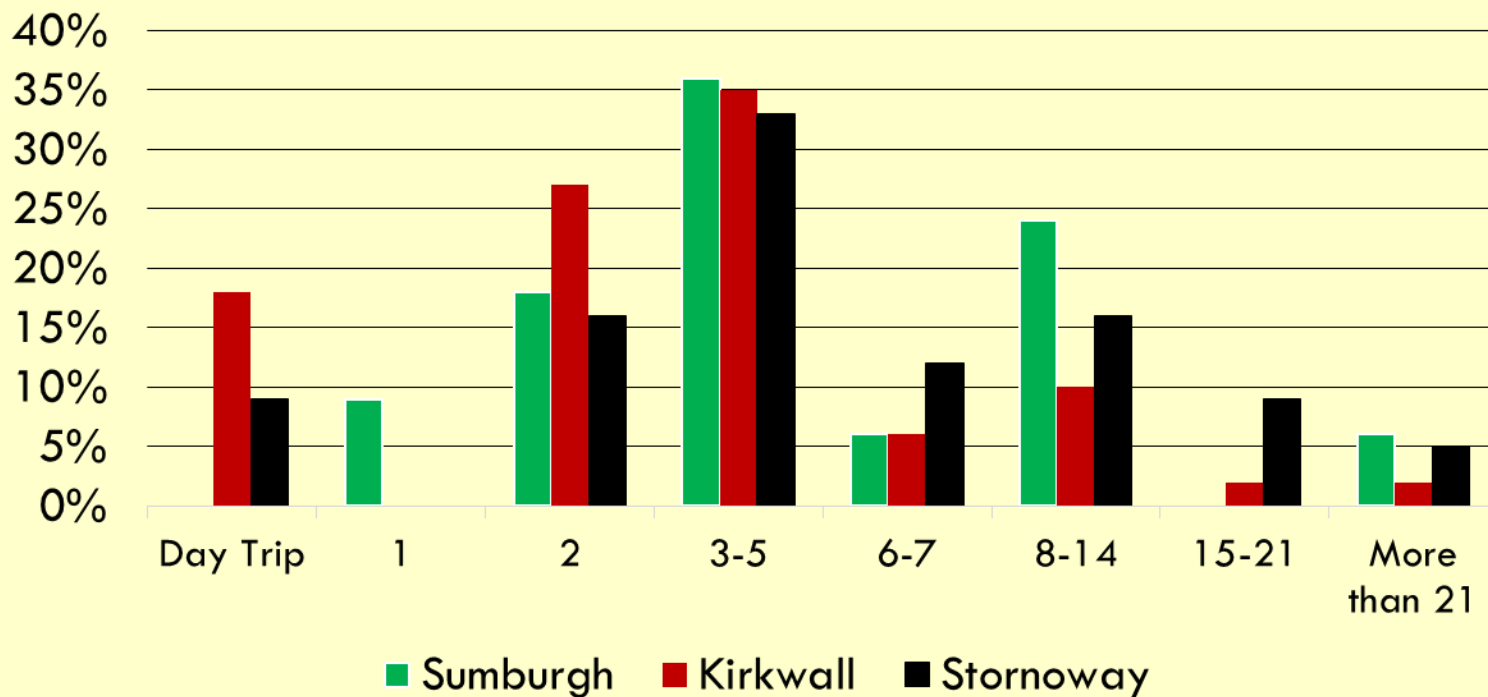
Vast majority of those dropping off passengers do not park in the car park

Did the person dropping you off park in the airport car park?				
	All	Sumburgh	Kirkwall	Stornoway
Yes	13%	23%	17%	4%
No-they dropped me and then left	87%	77%	83%	96%

Base: All airport interviewees who had been dropped off at the airport by someone else

Most resident flyers are away for between two and five days

Island residents who parked their vehicle at the airport before flight: number of days will be away



Base: All airport interviewees who are island residents, were catching a flight and who parked their vehicle at the airport

Potential Impacts of Parking Charges

Very high awareness of proposals-including one in three Shetland visitors

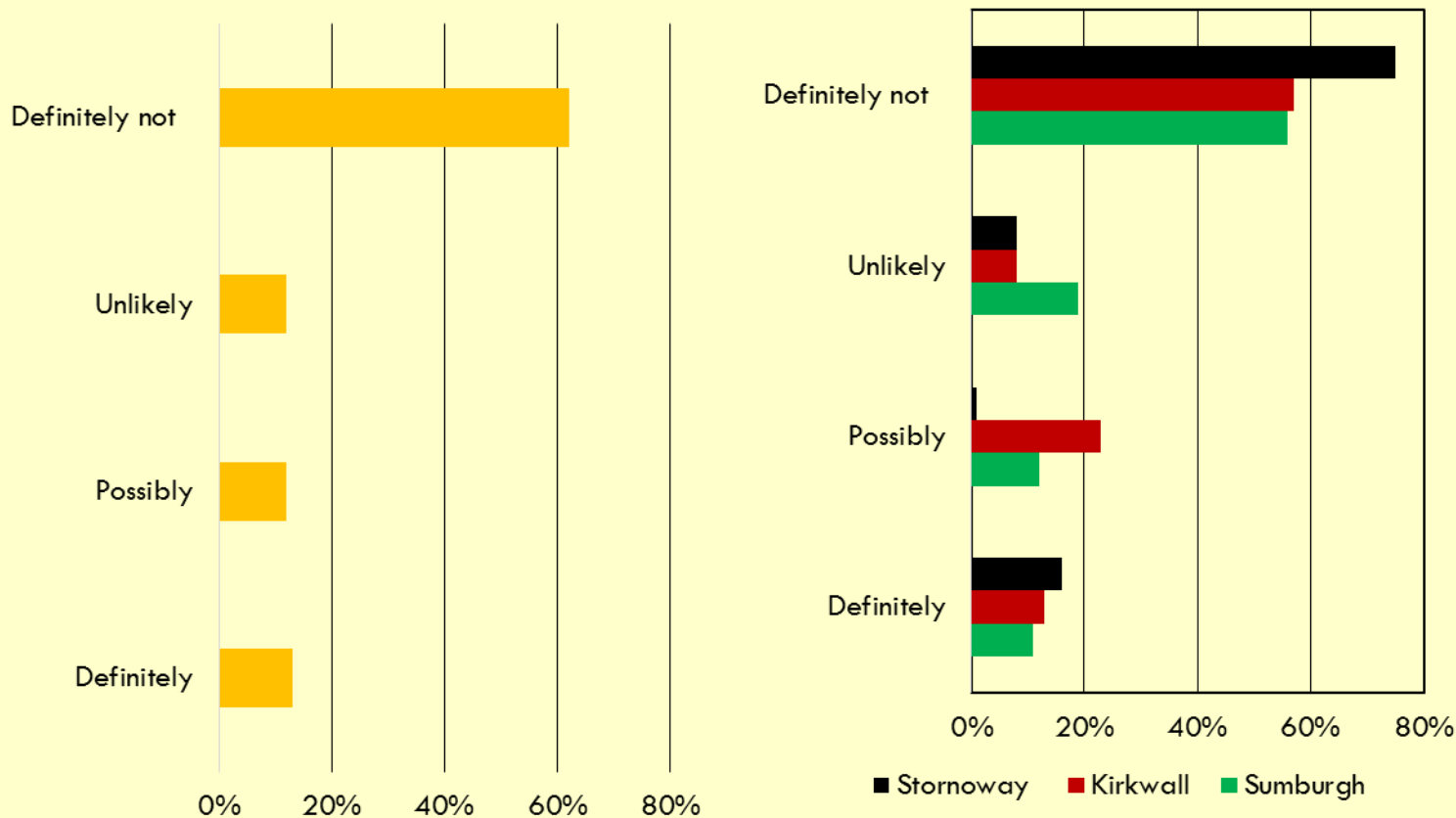
Before this interview today were you aware that car parking charges will be introduced?

Island Residents				
	All	Sumburgh	Kirkwall	Stornoway
Yes	88%	93%	87%	84%
Visitors				
Yes	18%	32%	14%	12%

Base: All airport interviewees

Over 60% would definitely not change their transport mode to the airport-only 13% would definitely do so

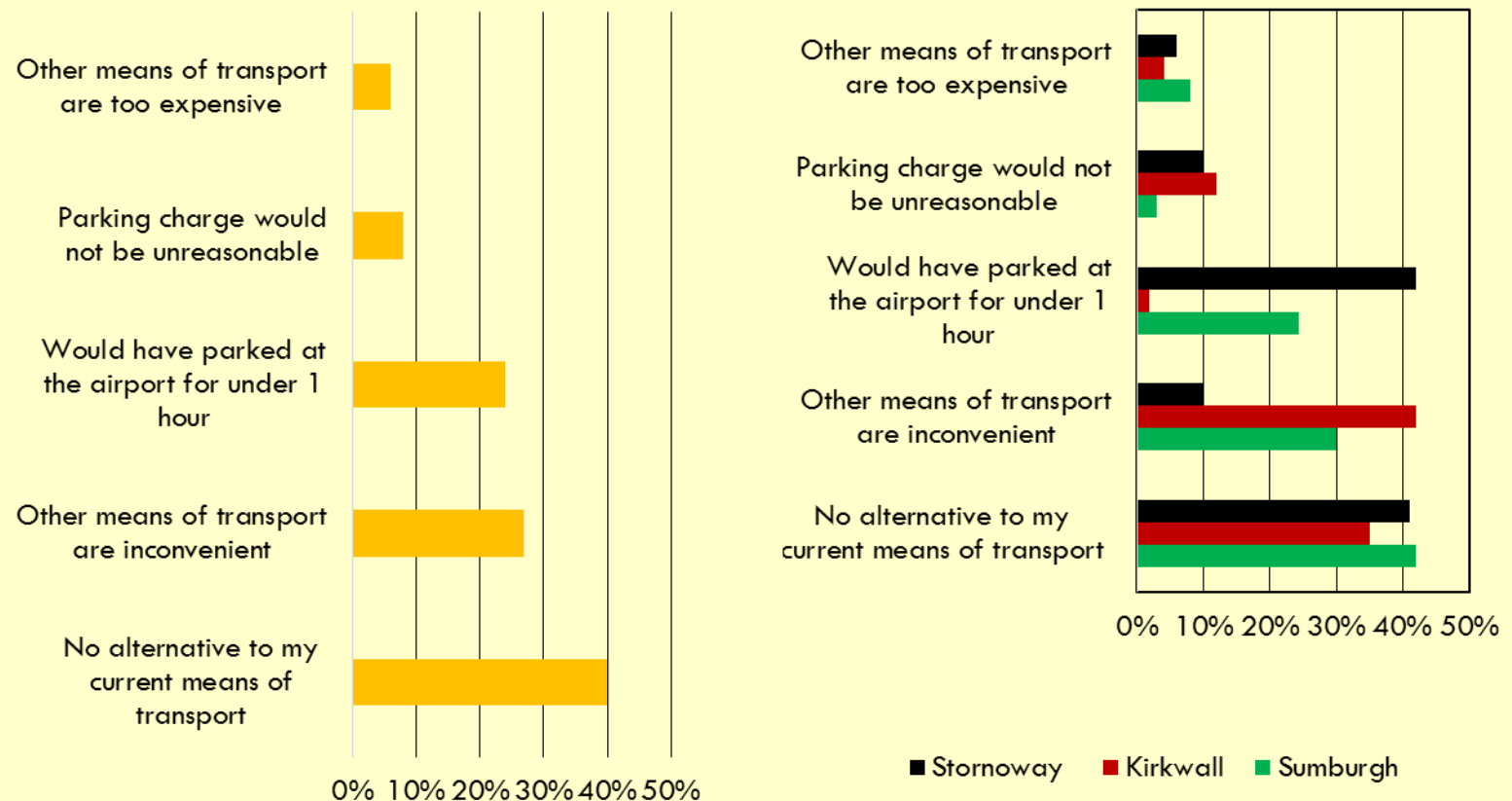
For your trip today, if parking charges had been in place how likely is it that you would have travelled to the airport in a different way?



Base: All airport interviewees who travelled to the airport in a vehicle that was then parked there

Lack of alternatives and inconvenience main reasons why would not change transport mode

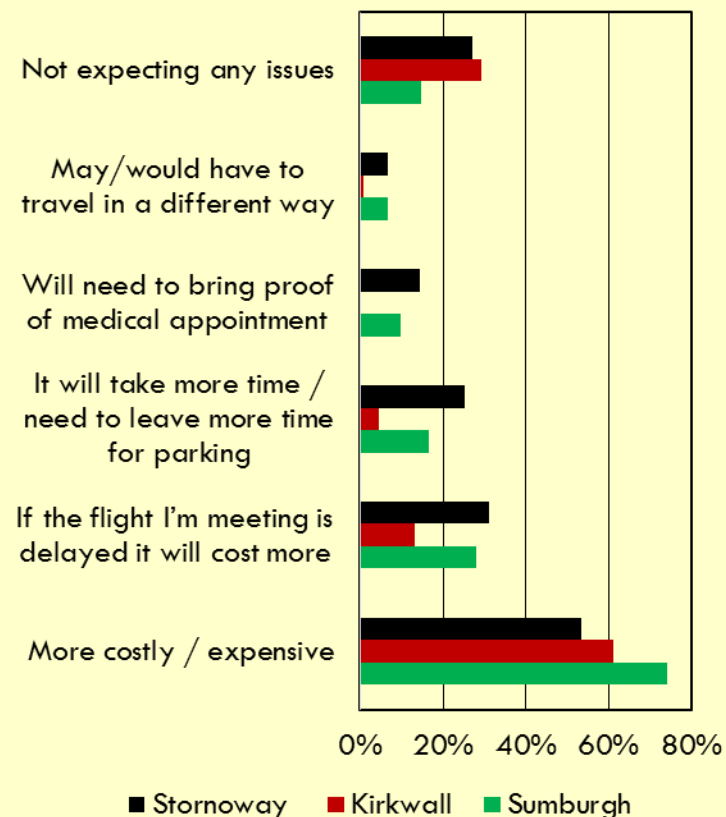
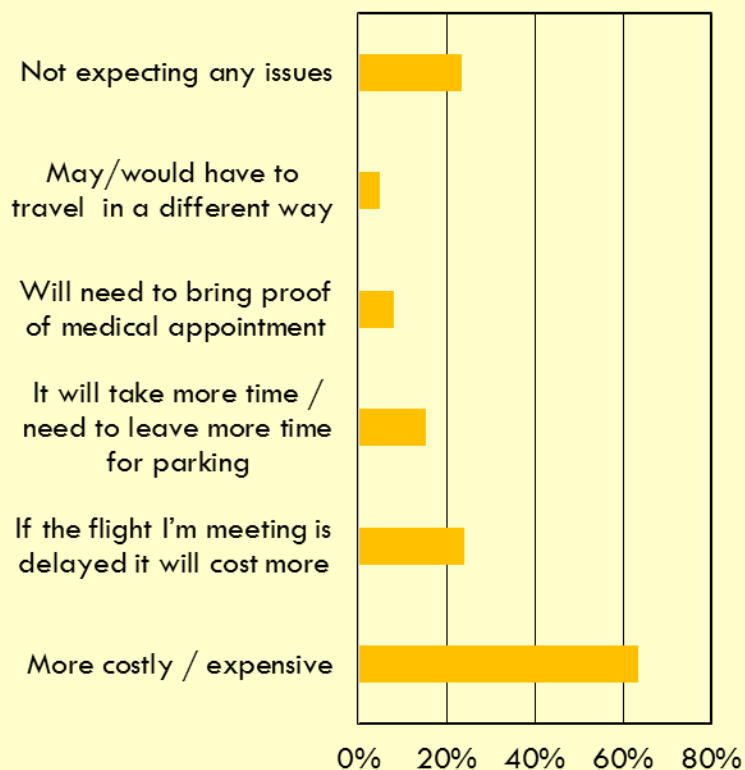
Why would you be unlikely to/definitely not have travelled to the airport in a different way?



Base: All airport interviewees who parked at the airport and unlikely to/definitely not have travelled to the airport in a different way. Multiple responses allowed. Main responses shown

Cost is the main issue arising from charges, while c25% do not expect any issues at all

What, if any, issues might you face if the car parking charges are introduced?



Base: Island residents who park and/or drop off/collect people at the airport. Multiple responses allowed. Main responses shown

Sumburgh: Improved bus service and lower charges for some groups most requested measures

What could be done to address the issues you might face due to parking charges?

- Don't introduce charges: 37% of those providing a response
- Enhanced bus schedule to better connect with flights: 19%
- Reduced parking charges for specific groups (e.g. Blue Badge, those parking short term): 12%
- Charge less than £3 per day: 7%
- Time related taper-i.e. less than £3 per day for longer stayers: 4%

*Base: Respondents who had identified possible issues from the parking charges. Open ended question. Multiple responses allowed.
Main responses shown*

Kirkwall: Lower/no charges for North Isles residents and extending free parking time are among the leading measures

What could be done to address the issues you might face due to parking charges?

- Don't introduce charges: 16% of those providing a response
- Reduced rate or free for Orkney North Isles residents: 13%
- Bigger car park/more spaces required: 11%
- Allow more than 1 hour free for those picking up/dropping off: 10%
- Stop those not using the airport from parking there: 10%
- Reduced charges for specific groups (e.g. longer stayers, disabled): 9%

*Base: Respondents who had identified possible issues from the parking charges. Open ended question. Multiple responses allowed.
Main responses shown*

Stornoway: Lower charges for some groups and grace period when flights are delayed are the main means of addressing issues

What could be done to address the issues you might face due to parking charges?

- Don't introduce charges: 47% of those providing a response
- Reduced parking charges for specific groups (e.g. longer stayers): 19%
- Allow more than 1 hour free parking when flights are delayed: 11%
- Enhanced bus schedule (e.g. Sunday service, more frequent): 9%

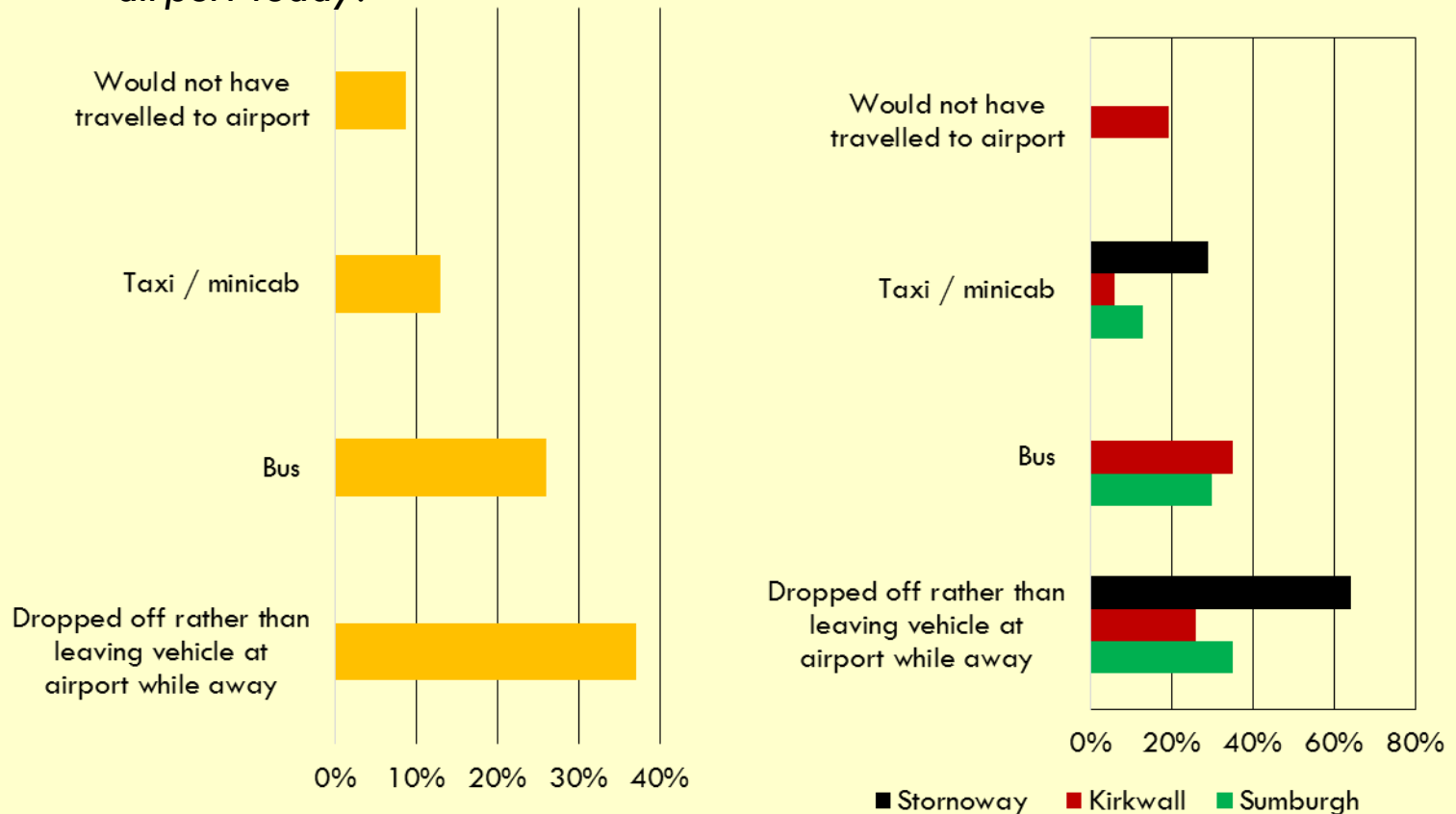
*Base: Respondents who had identified possible issues from the parking charges. Open ended question. Multiple responses allowed.
Main responses shown*



Potential Impacts For Those Most Likely To Change How They Travel to The Airport

Most would switch to either being dropped off or the bus-drop off particularly high for Stornoway

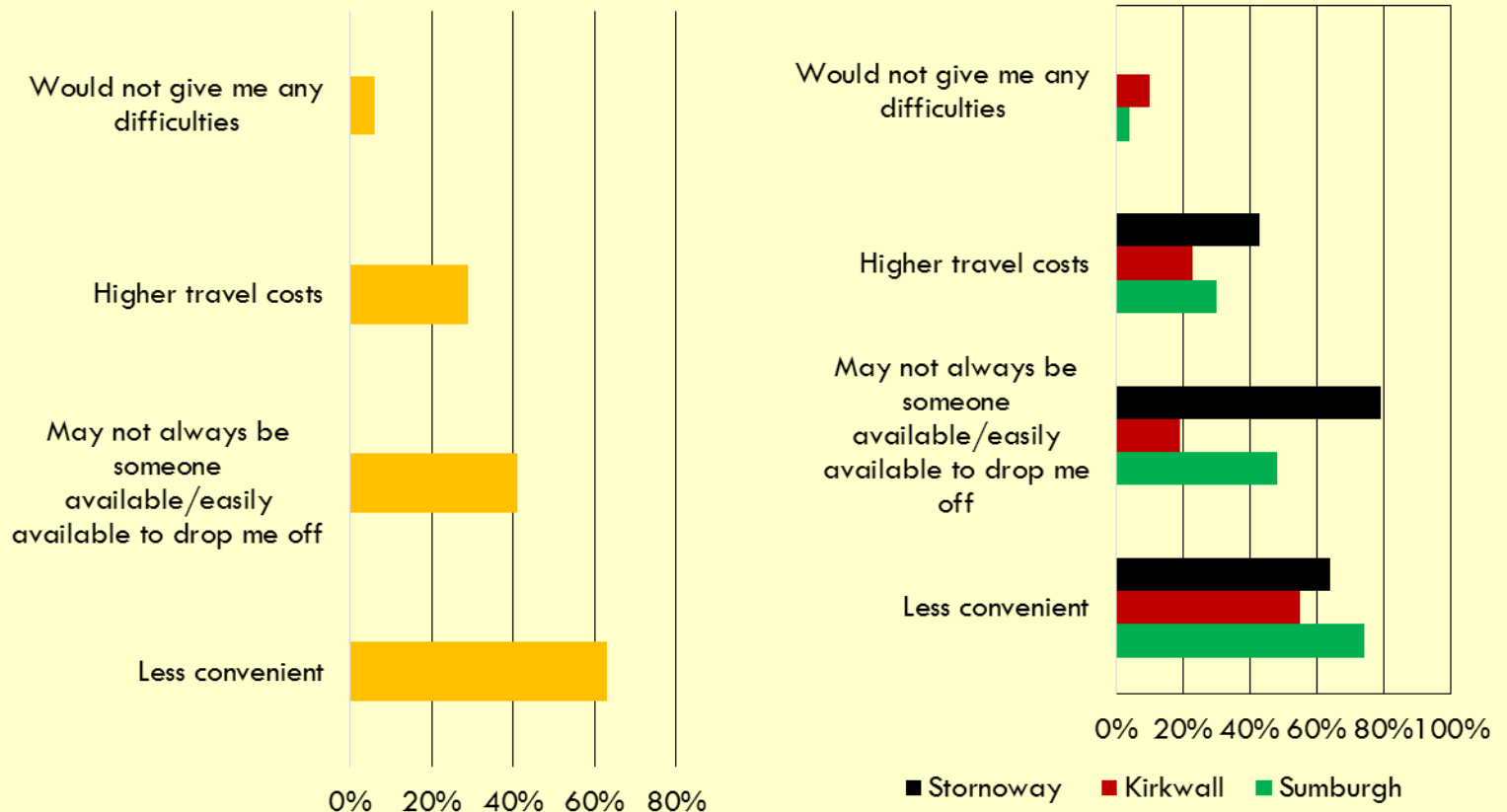
What other means of transport would you have used to arrive at the airport today?



Base: Airport interviewees who definitely/possibly would have travelled to the airport in a different way.
Main responses shown

Most could face either reduced convenience or being unable to get a lift

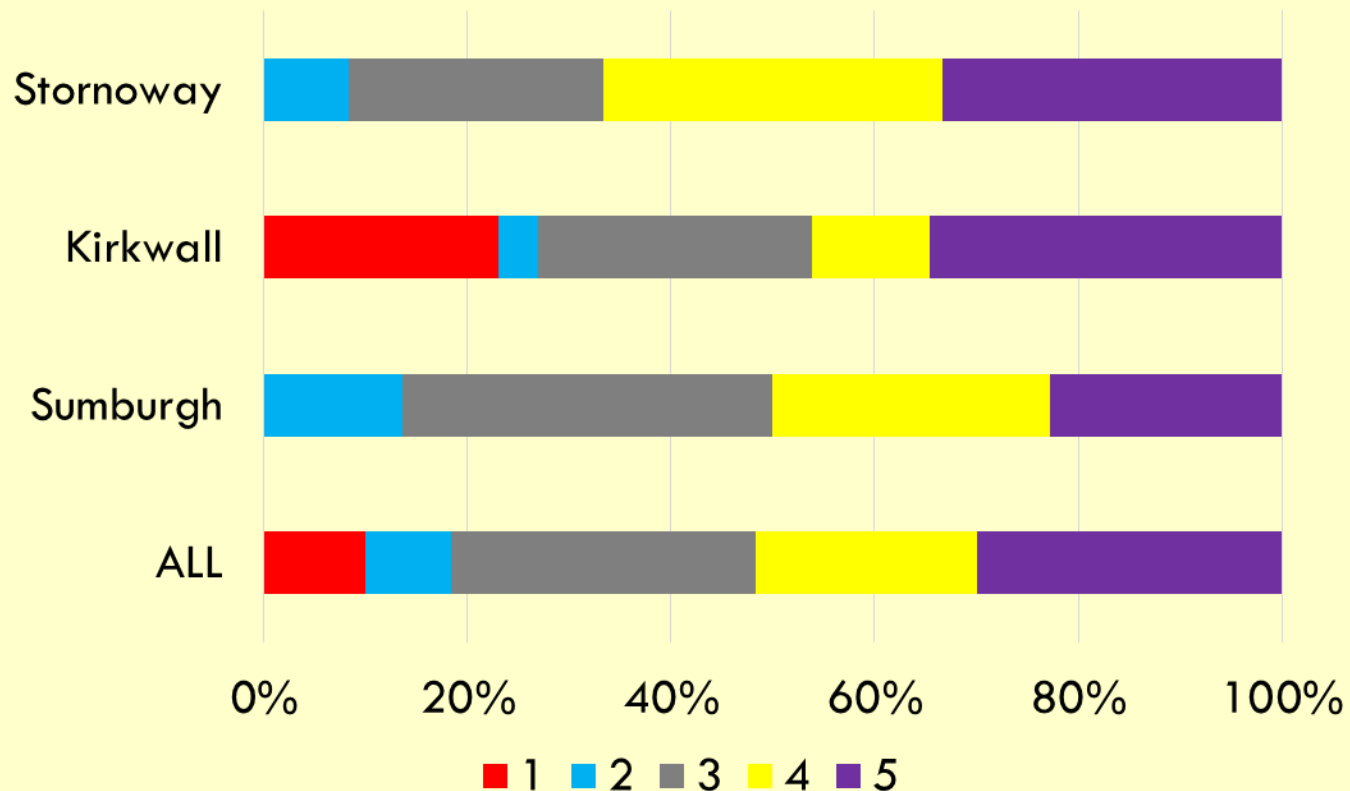
What, if any, difficulties might using this other means of transport give you?



Base: Airport interviewees who definitely/possibly would have travelled to the airport in a different way.
Multiple responses allowed. Main responses shown

Most rate difficulties as significant or slightly less-particularly at Stornoway

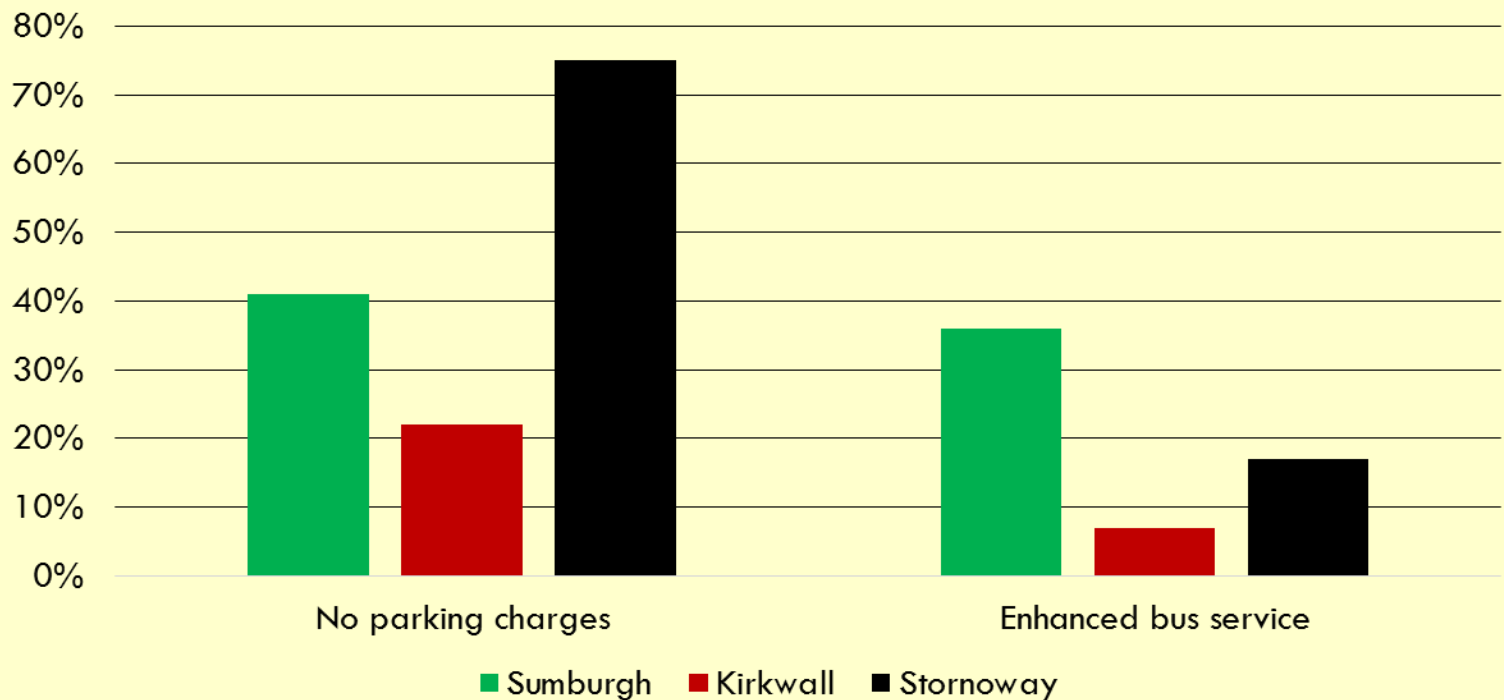
How would you describe these difficulties?
Rating between 1 (Minor) and 5 (Significant)



Base: Airport interviewees who definitely/possibly would have travelled to the airport in a different way.

Bar not introducing the charges the main means of addressing issues is a better bus service

What could be done to address difficulties in using another means of transport?



Base: Airport interviewees who expect more than minor difficulties from having to use another means of transport.

Open ended question. Main responses shown



Views on Airport Improvements That Could Be Funded by Parking Charges

Sumburgh: Most don't see any improvements required, car parking enhancements, improved road access and improved shops are main desired changes

What improvements would you like to see funded by the parking charges?

Island Residents

- None required: 27%
- More parking spaces: 19%
- Various car park improvements (e.g. greater security): 17%
- Improved shops: 12%
- Enhanced bus service: 8%

Visitors

- None required: 24%
- Improved road access/signage to terminal: 17%
- Improved shops: 15%

Base: All respondents. Open ended question. Multiple responses allowed. Results exclude "Don't Know"s. Main responses shown

Kirkwall: Car parking extension/upgrade very clearly the main desired improvement

What improvements would you like to see funded by the parking charges?

Island Residents

- Car parking-more/bigger: 44%
- None required: 27%
- Car parking-wider spaces: 10%
- Car parking-resurfacing: 9%
- Free/reduced rate parking for isles residents: 6%

Visitors

- None required: 72%
- Various car park improvements (e.g. resurfacing): 7%

Base: All respondents .Open ended question. Multiple responses allowed. Results exclude "Don't Know"s .Main responses shown

Stornoway: Improved bus service the main desired improvement-for both residents and visitors

What improvements would you like to see funded by the parking charges?

Island Residents

- Improved bus service: 20%
- None required: 20%
- Various car park improvements (e.g. more disabled spaces): 9%
- Car parking-more/bigger: 6%

Visitors

- None required: 27%
- Improved bus service: 14%
- Improved shops: 7%

Base: All respondents .Open ended question. Multiple responses allowed. Results exclude "Don't Know"s. Main responses shown



Key Survey Findings

Travel to the Airport and Parking

- Two thirds of sample travelled to the airport by private or company vehicle
- 50% of sample were in a vehicle that parked in the airport car park
- 17% were dropped off without using airport car park
- Further 11% used a taxi/minicab and 7% a scheduled bus
- Use of bus varies by airport- depends on timetable's fit with flights, and the number of communities served by the route
- Perceived lack of convenience is main barrier to using the bus
- 14% said their party included a Blue Badge scheme member (compares to 4% of Scottish adult population)

Those Taking A Flight

- Over 40% of flyers were on a business/work related trip (both residents and visitors)
- One in six residents were making a health-related trip
- Most residents would be away for between two and five days, with a number away for over two weeks

Parking Charges: Potential Non-Switchers

- Substantial majority (75%) of those who parked in the airport car park would *definitely not*, or are *unlikely to*, change how they travel to the airport
- Mainly due to lack of alternatives to their current travel, and perceived inconvenience of other means of transport

Parking Charges: Potential Switchers

- 25% of those who parked in the airport car park would *definitely* or *possibly* change how they travel to the airport
- Most would switch to being dropped off instead of parking the car at the airport, or take the bus
- Main difficulties from this would be reduced convenience or possible non-availability of a lift
- Most see the potential difficulties as quite significant or significant
- Enhanced bus service is seen as the main means of addressing difficulties

Parking Charges: Issues

- The main issue from the charges would be increased costs-including when picking up someone whose flight is delayed

- Apart from not introducing the charges the mostly commonly suggested means of addressing issues were:
 - i. Reduced/no charges for specific groups (though no consensus on *which* groups)
 - ii. Enhanced bus service
 - iii. Free parking for more than 1 hour in case of flight delays

Airport Improvements That Could Be Funded by Parking Charges

- Improve/extend car parking facilities given these would now be charged for
- Improved retail offer

Airport-Specific Issues

Sumburgh

- Public transport connections at Lerwick can mean very long journey times from the North Isles and parts of north mainland
- Distance of Sumburgh from main population centres makes taxi expensive
- Demand for bus reduced because if inbound flight delayed then last bus could be missed
- Leads to a relatively high level of drop offs/picks ups

Kirkwall

- Wider parking issues-number of spaces and parking by those not using the airport (e.g. commuting into Kirkwall on airport bus)
- North Isles residents have cars permanently based at airport which they use in conjunction with inter-island flight
- Especially affects North Ronaldsay and Papa Westray residents as their ferry services do not take cars
- Airport café used by customers who are not flying or picking up/dropping off-could be lost due to charges
- Has the highest proportion of potential switchers (more than one third)-most would look to use the bus

Stornoway

- Vast majority consider that, in effect, there is no airport bus service
- May have the highest numbers of passengers who work off-island for extended periods
- Has the highest proportion of potential switchers who would look to be dropped off at the airport

Recommendations

Recommendations

- That HIAL reviews the survey findings to inform the implementation of parking charges
- The charging system could differ slightly between the three airports to reflect local circumstances
- However, any variations need to be seen as reasonable and equitable, including between the three airports
- Based on the survey findings, HIAL considers possible variations on the general parking charge for those most reliant on private transport for travel to the airports