European Commission

Special Eurobarometer 457

Report

Coach Services

Fieldwork
March 2017
Publication
August 2017

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INTRODUCTION

An effective road transport system is crucial to the economy of the European Union, contributing directly to achieving the European Commission's priorities of jobs and growth, the single digital market and the energy union. Coach services form an essential part of the mix in terms of domestic and international passenger transport, and are valuable to both people and businesses, whether for visiting friends and family, taking short breaks and holidays, commuting to work or places of education or connecting with other transport modes such as airports and railways stations. Coach transport has a number of advantages over other modes of transport, particularly in terms of safety and environmental impact. Coaches are a flexible transport mode and, unlike trains and aircraft, are broadly able to pick up and set down passengers anywhere with minimal provision of fixed infrastructure.

For all these reasons, the European Commission aims to enhance the accessibility and competitiveness of inter-urban regular services, which will also help to meet the EU's targets for sustainability and energy efficiency. In 2011, an EU regulation introduced a set of common rules for access to the international market for coach and bus services, and the EU has also introduced legislation to protect passenger rights for users of coach transport services. Domestic services have now been liberalised in a number of Member States. However, coach and bus services have struggled to gain market share vis-à-vis other modes of transport.

This report presents the results of a Special Eurobarometer survey commissioned to help inform the European Commission's thorough review and analysis of the European coach industry, including both domestic and international services. The survey investigates:

- how many Europeans use coach services and how regularly they do so;

- the incidence of both domestic and international coach travel;

- the general purposes for which coach services are used;

- how citizens rate coach services in general, and a number of aspects in particular, including feelings of safety, punctuality and reliability, fares, comfort and integrated ticketing;

- the reasons why citizens choose to travel by coach; and

- what improvements in existing services, if any, would make them more likely to do so.

The report presents the results for the EU as whole, also showing how these results vary from country to country, and any significant variations by gender, age, education and other socio-demographic variables.

This survey was carried out by TNS opinion & social network in the 28 Member States of the European Union between 18 and 27 March 2017. 27,901 respondents from different social and demographic groups were interviewed face-to-face at home in their mother tongue on behalf of the Directorate-General for Mobility and Transport (DG MOVE). The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Strategic Communication" Unit)[1]. A technical note on the manner in which interviews were conducted by the Institutes within the TNS opinion & social network is appended as an annex to this report. Also included are the interview methods and confidence intervals[2].

Note: In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

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[1] http://ec.europa.eu/commfrontoffice/publicopinion
[2] The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent could give several answers to the question.

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czech Republic	CZ	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Greece	EL	Poland	PL
Spain	ES	Portugal	PT
France	FR	Romania	RO
Croatia	HR	Slovenia	SI
Ireland	IE	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus*	CY	Sweden	SE
Latvia	LV	United Kingdom	UK

European Union – weighted average for the 28 Member States	EU28

* Cyprus as a whole is one of the 28 European Union Member States. However, the *acquis communautaire* has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the "CY" category and in the EU28 average.

We wish to thank the people throughout Europe
who have given their time to take part in this survey.
Without their active participation, this study would not have been possible.

EXECUTIVE SUMMARY

– Just over a third of respondents sometimes use coach services to travel to other locations in their own country; fewer than one in five travel by coach to other countries –

- A minority of respondents say they sometimes use coach services. Just over a third of respondents use them to travel to other locations in their own country (35%) and less than one in five do so to go to other countries (18%).

- At national level, a majority of respondents in 10 countries say that they sometimes use coach services to travel to other locations in their own country. Respondents in Estonia (73%), Latvia and Finland (both 68%) are the most likely to use coach services to go to other domestic locations, while respondents in Germany and France (both 18%) and Austria (27%) are the least likely to do so.

- The most commonly mentioned reasons for using coach services are visiting family or friends, going on holiday and other leisure activities. Just over a third of respondents (34%) have used coach services to visit family or friends, while around a quarter have done so to go on holiday (27%) or for other leisure (24%).

– A majority of respondents who sometimes use coach services rate their domestic services as good –

- Taking all respondents together, including those who never travel by coach, around half (49%) rate their national coach services as good, including 9% who say they are very good. Just over a quarter (26%) say that they are fair.

- Among respondents who use coach services, over six in ten (64%) rate their national services as good, including 15% who say they are very good. Just over a quarter (27%) say that coach services in their country are fair. One in twenty respondents (5%) say they are poor, including 1% who rate them as 'very poor'.

- Fewer than four in ten respondents who do not use coach services (38%) have a good impression of domestic services.

- Seven in ten respondents rate the feeling of safety at the terminal/stop and on the coach as good (70%), including almost one in five who rate this aspect as very good (19%). Just over one in five people (22%) say their feeling of safety is fair.

- A third of respondents (33%) give low prices as one of their main reasons for using coach services. Just over a quarter (27%) used coach services because they did not have a car. Fewer than one in five respondents mention reliability (18%), comfort and cleanliness (17%), and the absence of any other options for same destination (16%)

- Among respondents who never travel by coach, almost four in ten respondents (37%) say that not having a car would make them more likely to travel by coach.

I. USE OF COACH SERVICES

This first chapter examines how frequently people use coach services to travel to other locations in their own and other countries. It also details the main purposes of the coach trips respondents have made recently.

1 Frequency of use of coach services

– Just over a third of respondents sometimes use coach services to travel to other locations in their own country; fewer than one in five travel by coach to other countries –

Most of the respondents use coach services to travel to other locations in their own country (35%)[3] while just 18% use them to visit other countries[4]. However, frequency of usage for both is generally low. Indeed, among those who use coach services to travel in their own country (35%), more than half (18%) use them only once a year or less while just 2% use them several times a week, 4% do so several times a month and 11% several times a year.

Over six in ten respondents (64%) say that they never use coach services to go to other domestic locations. Among the 18% of respondents that use coach services to travel to other countries, just 1% do so several times a month and 4% several times a year, while 13% do so only once a year or less.

More than eight in ten respondents (81%) say that they never use coach services to travel to other countries.

QE1 How often do you use coach services to travel…
(% - EU)

… TO OTHER LOCATIONS IN (OUR COUNTRY)? 2 4 11 18 64 1

… TO LOCATIONS IN OTHER COUNTRIES? 0 1 4 13 81 1

Several times a week   Several times a month   Several times a year   Once a year or less   Never   Don't know
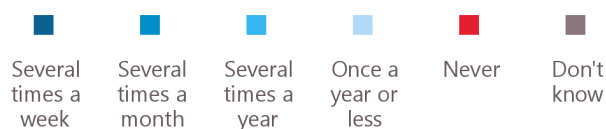
Base: all respondents (n=27,901)

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[3] How often do you use coach services to travel… to other locations in (OUR COUNTRY)?
[4] How often do you use coach services to travel… to locations in other countries?

At national level, a majority of respondents in 10 countries say that they use coach services to travel their own country at least once a year or less. Respondents in Estonia (73%), Latvia and Finland (both 68%) are the most likely to use coach services to go to other domestic locations, while respondents in Germany and France (both 18%) and Austria (27%) are the least likely to do so.

QE1.1 How often do you use coach services to travel...
... to other locations in (OUR COUNTRY)?
(% - TOTAL 'AT LEAST ONCE A YEAR OR LESS')

EE	73
LV	68
FI	68
BG	66
SE	65
EL	64
LT	61
HU	57
LU	54
HR	53
CZ	49
IE	48
SK	46
PL	45
SI	43
RO	43
DK	42
ES	40
CY	39
NL	37
UK	37
MT	35
EU28	35
IT	35
PT	30
BE	30
AT	27
FR	18
DE	18

Map Legend
- 61 - 100
- 46 - 60
- 36 - 45
- 0 - 35
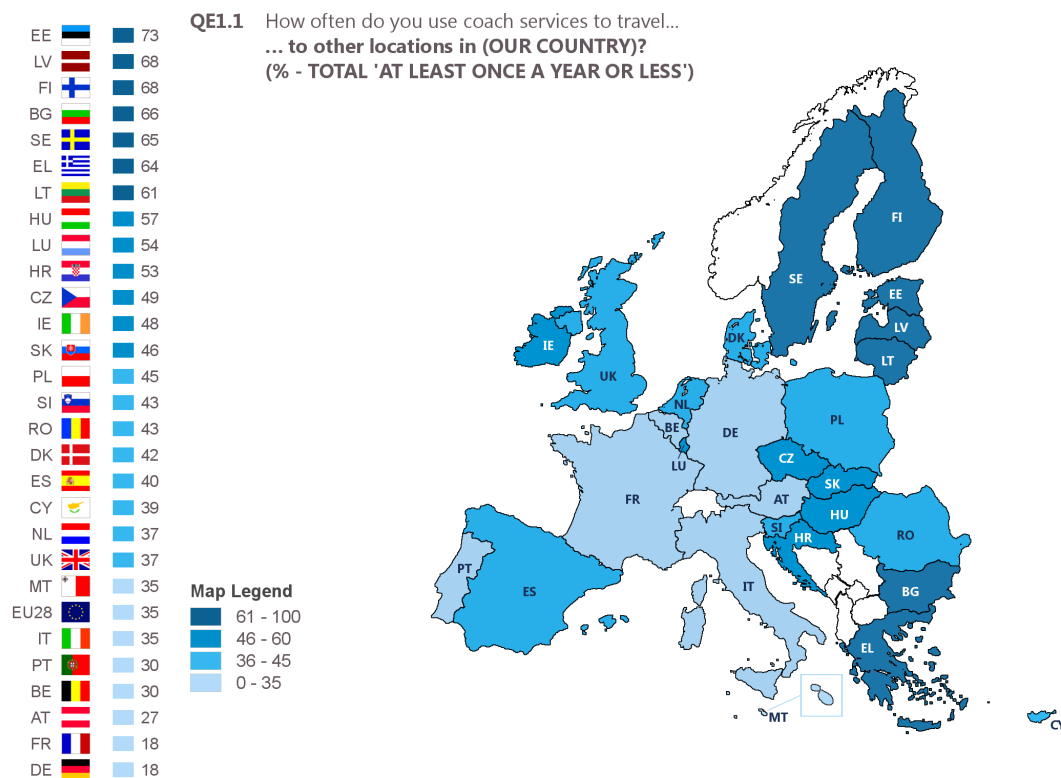
Base: all respondents (n=27,901)

QE1.1 How often do you use coach services to travel...
... to other locations in (OUR COUNTRY)? (%)

	EE	FI	LV	BG	SE	EL	LT	HU	LU	HR	CZ	IE	SK	PL	SI	RO	DK	ES	CY	NL	UK	IT	EU28	MT	BE	PT	AT	FR	DE
Don't know	0	1	1	1	0	0	0	0	1	1	1	0	1	1	0	2	0	0	0	0	0	1	1	4	0	0	0	0	0
Never	27	31	31	33	35	36	39	43	45	46	50	52	53	54	57	55	58	60	61	63	63	64	64	61	70	70	73	82	82
Once a year or less	26	34	30	25	37	38	19	14	9	25	20	20	18	22	16	24	20	24	20	11	25	16	18	20	13	17	15	10	12
Several times a year	31	23	24	27	20	21	19	20	18	19	21	19	20	15	17	12	14	12	11	17	10	11	11	10	12	9	8	5	6
Several times a month	12	7	11	9	4	4	15	14	11	7	5	6	5	7	5	3	3	3	4	5	11	5	4	3	3	3	3	2	0
Several times a week	4	4	3	5	4	1	8	9	16	2	3	3	3	1	5	4	5	1	4	4	0	3	2	2	2	1	1	1	0

■ Several times a week ■ Several times a month ■ Several times a year ■ Once a year or less ■ Never ■ Don't know

Base: all respondents (n=27,901)

In all Member States, only a minority of respondents sometimes use coach services to travel to other countries.

Respondents in Malta (47%), Cyprus (44%) and Latvia (41%) are the most likely to use coach services to travel to other countries, while respondents in Portugal (9%), Germany and France (both 12%) are the least likely to do so.

QE1.2 How often do you use coach services to travel…
… to locations in other countries?
(% - TOTAL 'AT LEAST ONCE A YEAR OR LESS')

MT	47
CY	44
LV	41
EE	39
HR	35
LU	34
FI	34
SI	32
CZ	29
SK	29
LT	28
BG	27
BE	27
IE	26
PL	26
RO	24
AT	24
SE	23
HU	20
UK	20
EL	20
IT	20
DK	19
EU28	18
NL	14
ES	13
FR	12
DE	12
PT	9

Map Legend
31 - 100
26 - 30
20 - 25
0 - 19
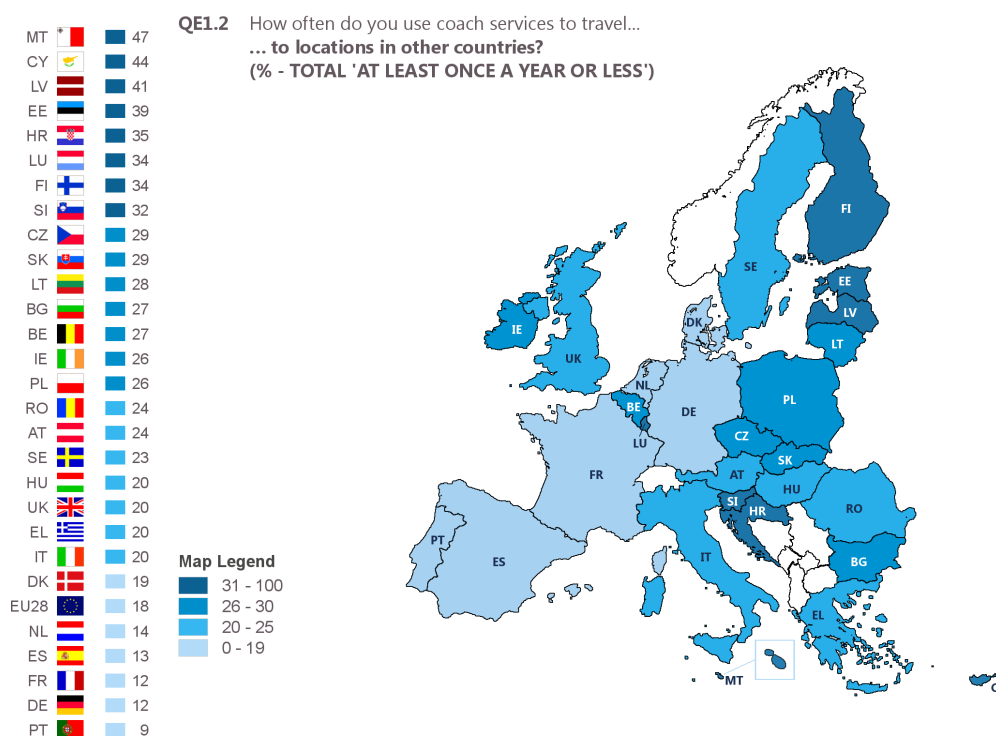
Base: all respondents (n=27,901)

QE1.2 How often do you use coach services to travel…
… to locations in other countries? (%)

	MT	CY	LV	EE	HR	LU	FI	SI	CZ	SK	LT	BE	BG	IE	PL	RO	AT	SE	IT	EL	UK	HU	DK	EU28	NL	ES	DE	FR	PT
Don't know	4	0	0	2	1	1	1	0	2	2	0	1	1	0	1	2	0	1	1	0	1	0	1	1	0	0	0	0	1
Never	49	56	59	59	64	65	65	68	69	69	72	72	72	74	73	74	76	76	79	80	79	80	80	81	86	87	88	88	90
Once a year or less	39	28	32	28	23	15	28	22	23	21	21	19	21	15	18	16	16	22	11	16	15	11	16	13	11	10	9	10	5
Several times a year	7	11	8	9	8	13	5	8	5	7	5	7	5	8	5	6	5	1	5	2	5	5	16	4	2	3	2	3	2
Several times a month	0	2	1	1	4	3	1	1	1	1	1	1	1	1	2	3	1	3	0	2	1	0	4	1	1	0	1	0	2
Several times a week	1	3	0	1	0	3	0	1	0	0	1	0	0	1	0	1	0	0	2	1	0	0	0	0	0	0	0	0	0

■ Several times a week ■ Several times a month ■ Several times a year ▨ Once a year or less ■ Never ■ Don't know

Base: all respondents (n=27,901)

Respondents under the age of 25 are the most likely to use coach services to travel to other domestic locations (54% vs. 30%–37%). The youngest respondents, aged 15-24, are also the most likely to use coach services to travel to other countries, immediately followed by those aged 25-39 (28% and 21% respectively, vs. 15%–16%).

Students are the most likely to use coach services to other domestic locations (56% versus 29%–36% of those who have already finished education). Students are also the most likely to use coach services to travel to other countries (29%) followed by those with higher education level (21% versus 12%–17%)

QE1	How often do you use coach services to travel…	
	Total 'At least once a year or less' (% - EU)	
	…to other locations in (OUR COUNTRY)?	…to locations in other countries?
EU28	35	18
Age		
15-24	54	28
25-39	37	21
40-54	30	16
55 +	32	15
Education (End of)		
15-	29	12
16-19	30	17
20+	36	21
Still studying	56	29

2 Main purposes of coach trips

– Visiting family or friends is the most mentioned reason for having made a coach trip –

Among the respondents who sometimes use coach services the most commonly mentioned reasons for using them are visiting family or friends, going on holiday and other leisure activities[5]. Just over a third of respondents (34%) have used coach services to visit family or friends, while around a quarter have done so to go on holiday (27%) or for other leisure activities (24%). Weekend breaks are mentioned by almost one in five respondents (17%). One in ten respondents (10%) have used coach services to travel to or from an airport. The least commonly mentioned reasons are traveling to a place of education (7%), traveling to work (7%), traveling to or from a rail station (7%) and business trips (6%).

QE3 Which were the main purposes of the coach trips you have made recently? (MAX. 3 ANSWERS)
(% - EU)

Purpose	%
VISIT FAMILY/ FRIENDS	34
TO GO ON HOLIDAY	27
OTHER LEISURE	24
WEEKEND BREAK	17
TRAVEL TO OR FROM AIRPORT	10
TRAVEL TO WORK	7
TRAVEL TO OR FROM RAIL STATION	7
TRAVEL TO PLACE OF EDUCATION	7
BUSINESS TRIP	6
OTHER	9
DON'T KNOW	2
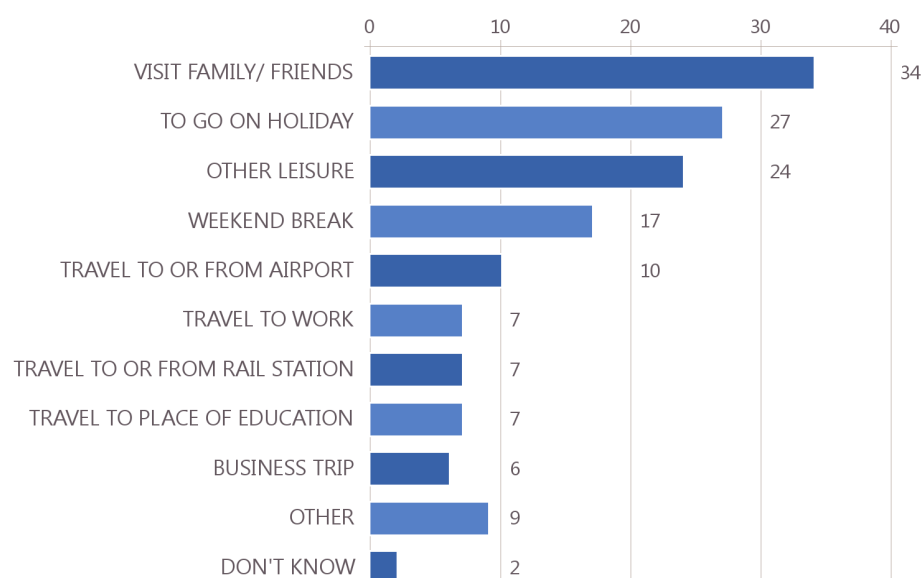
Base: respondents who sometimes use coach services (n=10,918)

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[5] Which were the main purposes of the coach trips you have made recently? (MAX. 3 ANSWERS)

'To visit family and friends' is the most mentioned purpose by users in 16 Member States, while 'to go on holiday' and for 'other leisure' are most mentioned in six and five countries respectively. 'Travel to or from rail station' is the most mentioned purpose by users in the Netherlands.

QE3 Which were the main purposes of the coach trips you have made recently? (MAX. 3 ANSWERS)
(% - THE MOST MENTIONED ANSWER BY COUNTRY)
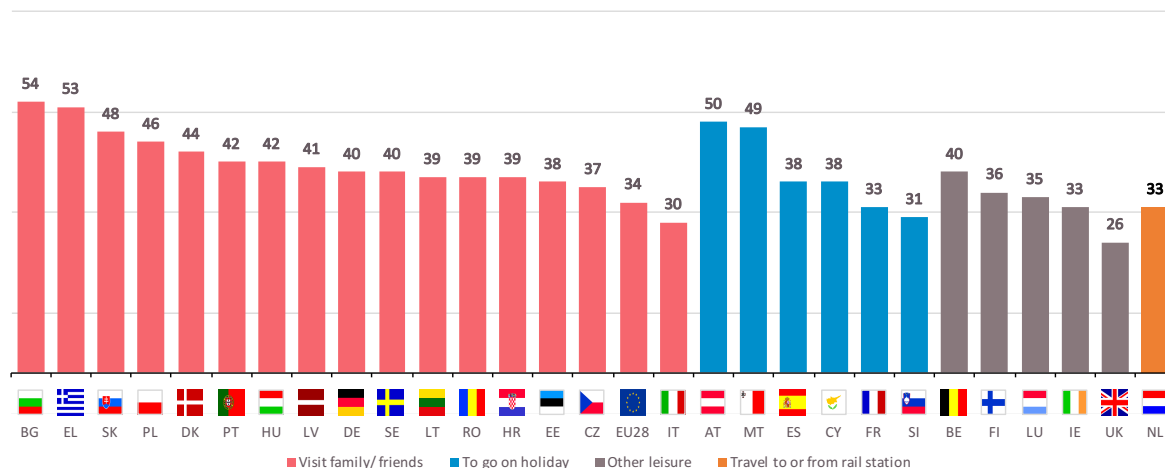
Base: respondents who use coach services at least once a year or less (n=10,918)

At least four in ten respondents in ten Member States have made a coach trip to visit family or friends. This answer is most common in Bulgaria (54%), Greece (53%) and Slovakia (48%), and least likely to be mentioned in Malta (4%), Slovenia (16%) and Belgium (18%).

In six Member States, more than one third of respondents have made a coach trip to go on holiday. This is most likely to be mentioned in Austria (50%), Malta (49%), and Spain and Cyprus (both 38%), but least likely to be mentioned by respondents in Latvia (9%), Hungary (11%) and the Netherlands (12%).

In five countries, more than one third of respondents use coach services for other leisure, including in Belgium (40%), Malta (37%) and Finland (36%). Respondents in Romania (12%), Poland (13%) and Germany (16%) are the least likely to do so.

Respondents in Austria (27%), the Czech Republic (26%) and Italy (25%) are the most likely to have recently used coach services for a weekend break. However, fewer than one in ten people in Malta (5%), Luxembourg (8%) and Finland (9%) have done so.

Respondents in Ireland (28%), Cyprus (24%) and Austria (23%) are most likely to say to have recently travelled by coach to go to or from an airport. However, fewer than one in twenty respondents in Bulgaria and Hungary (both 2%) and Croatia and Greece (both 3%) have done so.

The most likely to say that they have recently made a coach trip to travel to a place of education are respondents in Slovenia (16%), and in Slovakia, Ireland, Malta and Italy (all 11%). On another side, the least likely to have done so are respondents in Bulgaria, Germany (both 2%) and Greece (3%).

Respondents in the Netherlands (20%), Luxembourg (19%) and Hungary (16%) are the most likely to have recently used coach services to go to work, while respondents in Malta (1%), in Germany (2%), and the United Kingdom and Greece (both 4%) are the least likely to have done so.

People in the Netherlands (33%), Luxembourg (18%) and Sweden (17%) are the most likely to have recently used coach services to travel to or from a railway station. Fewer than one in twenty respondents in Latvia, Estonia, Greece and Portugal (all 2%) give this answer.

Respondents in Finland (14%), Estonia (12%) and the Czech Republic (9%) are the most likely to have taken a business trip by coach. They are least likely to have done so in Denmark, Spain and the Netherlands (all 2%).

Finally, at least one in five in Luxembourg (24%), Lithuania (23%), Hungary (21%) and Estonia (20%) mention other reasons.

QE3 Which were the main purposes of the coach trips you have made recently?
(MAX. 3 ANSWERS)
(%)

	Visit family/ friends	To go on holiday	Other leisure	Weekend break	Travel to or from airport	Travel to work	Travel to or from rail station	Travel to place of education	Business trip	Other	Don't know
EU28	34	27	24	17	10	7	7	7	6	9	2
BE	18	37	40	23	11	8	9	4	4	3	0
BG	54	22	18	20	2	10	4	2	7	12	2
CZ	37	28	22	26	7	8	6	9	9	9	1
DK	44	23	19	12	8	13	11	8	2	9	3
DE	40	36	16	24	8	2	3	2	5	6	2
EE	38	13	19	14	4	11	2	10	12	20	2
IE	27	24	33	15	28	6	7	11	6	6	0
EL	53	28	34	14	3	4	2	3	8	13	0
ES	34	38	25	15	8	7	3	5	2	10	0
FR	19	33	28	18	11	5	7	8	3	6	1
HR	39	18	32	19	3	7	3	6	7	12	2
IT	30	27	29	25	15	5	15	11	8	7	0
CY	21	38	34	14	24	8	5	6	6	16	1
LV	41	9	20	14	8	12	2	6	7	15	1
LT	39	16	29	15	7	15	4	9	3	23	2
LU	21	20	35	8	15	19	18	8	4	24	1
HU	42	11	26	15	2	16	5	8	4	21	1
MT	4	49	37	5	21	1	10	11	4	9	6
NL	28	12	23	10	9	20	33	10	2	14	2
AT	26	50	23	27	23	6	14	9	6	4	1
PL	46	30	13	16	5	8	6	5	8	7	4
PT	42	19	32	16	4	8	2	6	6	13	0
RO	39	18	12	12	4	13	7	8	8	16	2
SI	16	31	24	18	8	12	7	16	7	14	1
SK	48	31	22	19	4	9	5	11	5	8	2
FI	26	20	36	9	12	9	8	9	14	11	3
SE	40	14	23	11	22	15	17	5	5	7	2
UK	23	24	26	15	13	4	3	8	4	5	3

1st MOST FREQUENTLY MENTIONED ITEM

2nd MOST FREQUENTLY MENTIONED ITEM

3rd MOST FREQUENTLY MENTIONED ITEM

Base: respondents who use coach services at least once a year or less (n=10,918)

A review of the socio-demographic data shows that women (38%) are somewhat more likely than men (30%) to use coach services to visit family or friends.

Respondents aged 40-54 are the least likely to mention visiting family or friends (28% vs. 36%–37%) or going on holiday (23% vs. 27%–30%) as reasons for recent coach trips. Respondents aged 25 to 39 are the most likely to have used coach services recently for a weekend break (21%), while the oldest respondents – those aged 55 or over – are the least likely to have done so (14%).

Those who have difficulty in paying their bills most of the time are the most likely to have used coach services recently to visit family or friends (49% vs. 31% of those who never or almost never have this problem).

QE3 Which were the main purposes of the coach trips you have made recently? (MAX. 3 ANSWERS)
(% - EU)

	Visit family/friends	To go on holiday	Other leisure	Weekend break
EU28	34	27	24	17
Gender				
Man	30	27	23	18
Woman	38	27	24	17
Age				
15-24	36	28	25	20
25-39	36	27	22	21
40-54	28	23	23	17
55 +	37	30	26	14
Difficulties paying bills				
Most of the time	49	20	22	13
From time to time	36	26	25	18
Almost never/ Never	31	29	23	18

II. EVALUATING COACH SERVICES

Respondents were then asked to rate coach services in their country overall and to assess various aspects of these services.

1 General rating of coach services

– A majority of respondents who sometimes use coach services rate their domestic services as good –

Among respondents who sometimes use coach services, over six in ten respondents (64%) rate their national services as good, including 15% who say they are very good[6]. Just over a quarter (27%) say that coach services in their country are fair. One in twenty respondents (5%) say they are poor, including 1% who rate them as 'very poor'.

QE2a Overall how do you rate coach services in (OUR COUNTRY)? **(% - EU)**
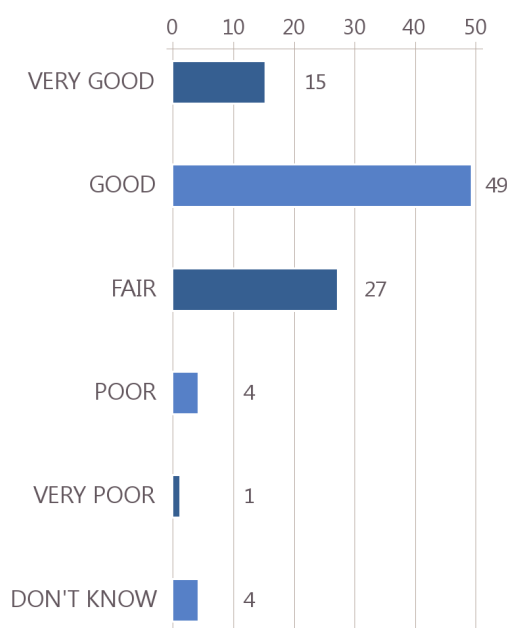
Base: respondents who sometimes use coach services (n=10,918)

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[6] Overall how do you rate coach services in (OUR COUNTRY)?

In all Member States, a relative majority of those who use coach services give a good rating to the coach services in their country, most strikingly in Ireland (84%), Spain (83%) and Austria (79%). At the other end of the scale, are respondents in Romania (43%), Sweden (44%) and Denmark (46%).

Up to four in ten respondents in Sweden (40%), and Croatia and Hungary (both 39%) rate their domestic coach services as fair, while fewer than one in six do so in Ireland (11%), Spain (14%) and Germany and Malta (both 15%).

Respondents are most likely to rate their national coach services as poor in Romania (16%), Denmark (15%) and Slovenia (14%).

QE2a Overall how do you rate coach services in (OUR COUNTRY)?
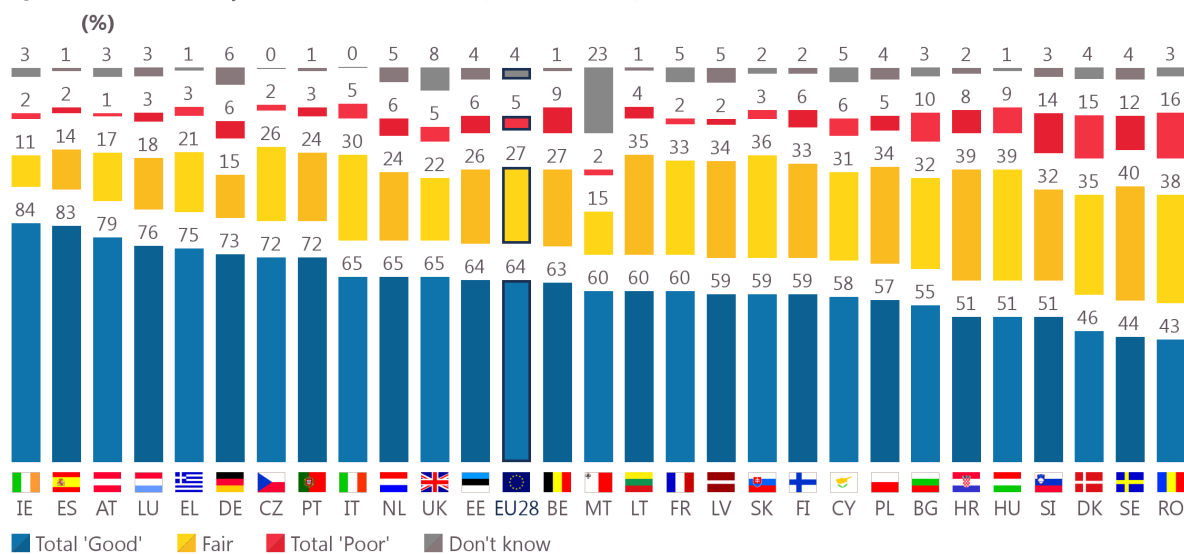
Base: respondents who sometimes use coach services (n=10,918)

Nearly four in ten respondents who do not use coach services (38%) think that the services present in their country are good, including 5% who believe they are very good[7]. Just over a quarter of respondents (26%) think that coach services in their country are fair. Fewer than one in ten respondents (8%) believe they are poor, including 2% who believe that they are very poor.

Almost three in ten (28%) of the respondents could not answer.

QE2b Which of the following best describes your view of coach services in (OUR COUNTRY)?
(% - EU)
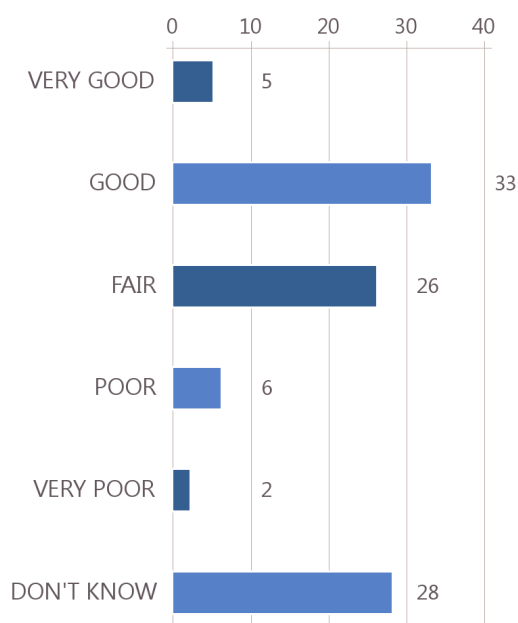
Base: respondents who do not use coach services (n=16,983)

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[7] Which of the following best describes your view of coach services in (OUR COUNTRY)?

In 12 Member States, a majority of respondents think that domestic coach services are good, but in 17 Member States more than 20% of respondents could not express an opinion.

Over half of respondents in Cyprus (56%), Greece (55%) and Ireland (52%) rate coach services as good, while respondents are least likely to give this answer in Bulgaria (21%), Romania (23%) and Slovakia and Hungary (both 24%).

Around one in five individuals in Slovenia (21%), and Italy and Croatia (both 18%) rate coach services in their country as poor.

QE2b Which of the following best describes your view of coach services in (OUR COUNTRY)?
(%)

	CY	EL	IE	LT	ES	FR	PL	AT	CZ	PT	EU28	IT	BE	FI	DK	DE	LV	UK	MT	SI	EE	HR	NL	LU	SE	HU	SK	RO	BG
Don't know	18	14	24	22	19	18	28	31	28	42	28	15	14	16	19	39	27	42	49	12	33	16	40	45	23	20	31	31	47
Total 'Poor'	8	4	5	6	3	6	4	10	7	1	8	18	10	9	13	7	4	6	1	21	9	18	8	7	12	14	9	17	9
Fair	18	27	19	25	31	31	28	20	26	19	26	30	39	38	32	34	18	34	17	34	26	37	24	20	38	42	36	29	23
Total 'Good'	56	55	52	47	47	45	40	39	39	38	38	37	37	37	36	36	35	35	33	33	32	29	28	28	27	24	24	23	21

- Total 'Good'
- Fair
- Total 'Poor'
- Don't know
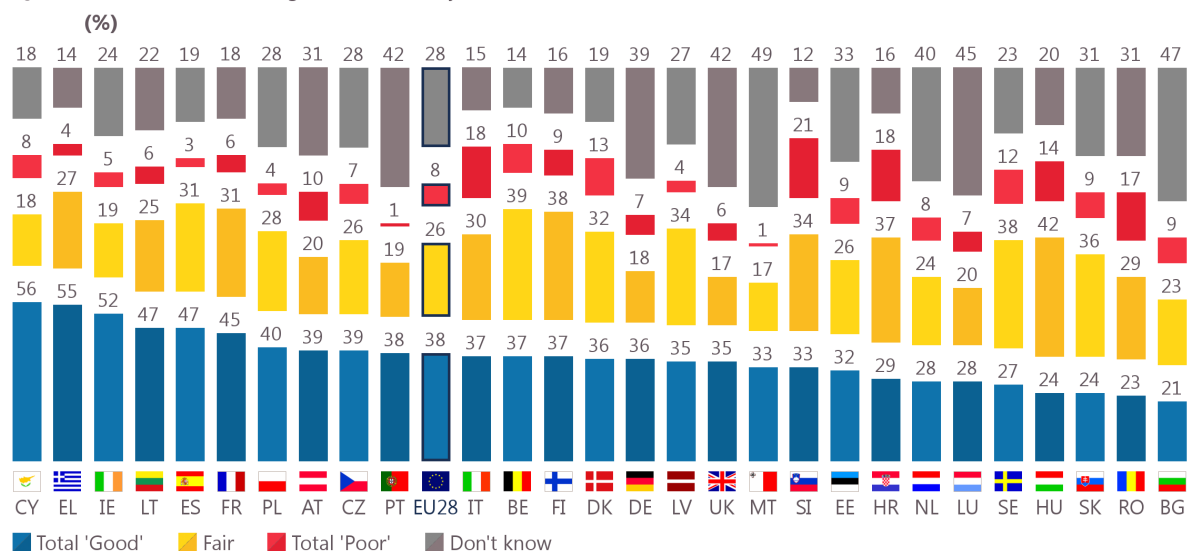
Base: respondents who do not use coach services (n=16,983)

Taking all respondents together, those who sometimes use coach services and those who never use them, around half (49%) rate national coach services as good, including 9% who say they are very good. Over a quarter (26%) say that they are fair. Fewer than one in ten respondents (7%) rate coach services in their country poor in total, including 2% who rate them as very poor, while 18% of respondents expressed no opinion.

QE2T Rate/view of coach services - TOTAL
(% - EU)
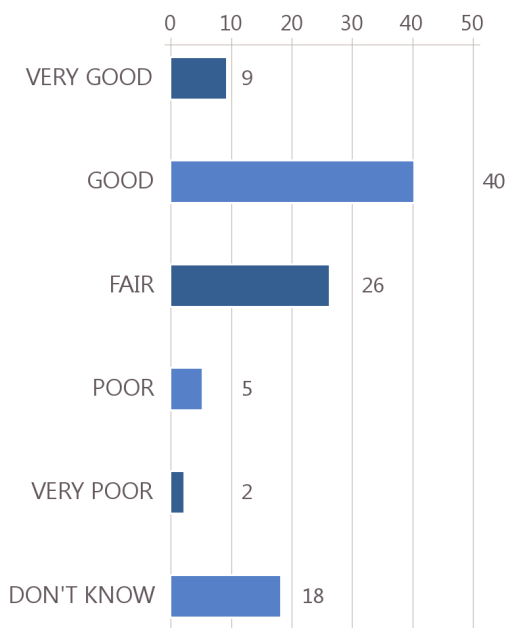
Base: all respondents (n=27,901)

In all but two Member States, a relative majority of respondents rate their domestic coach services as good. The only exceptions are Romania (32% for 'Good') and Sweden (38% for 'Good'). In these two countries, the relative majority rate coach services as 'fair'.

Nearly seven in ten respondents in Greece and Ireland (both 69%) and more than six in ten in Spain (62%) give a good rating to coach services in their countries.

Respondents in Hungary and Sweden (40%) are the most likely to rate coach services as 'fair', followed by those in Croatia (38%).

At the other end of the scale, respondents in Romania, Slovenia (both 17%) and Denmark (13%) are the most likely to rate their national coach services as poor.

QE2T Rate/view of coach services – TOTAL **(%)**
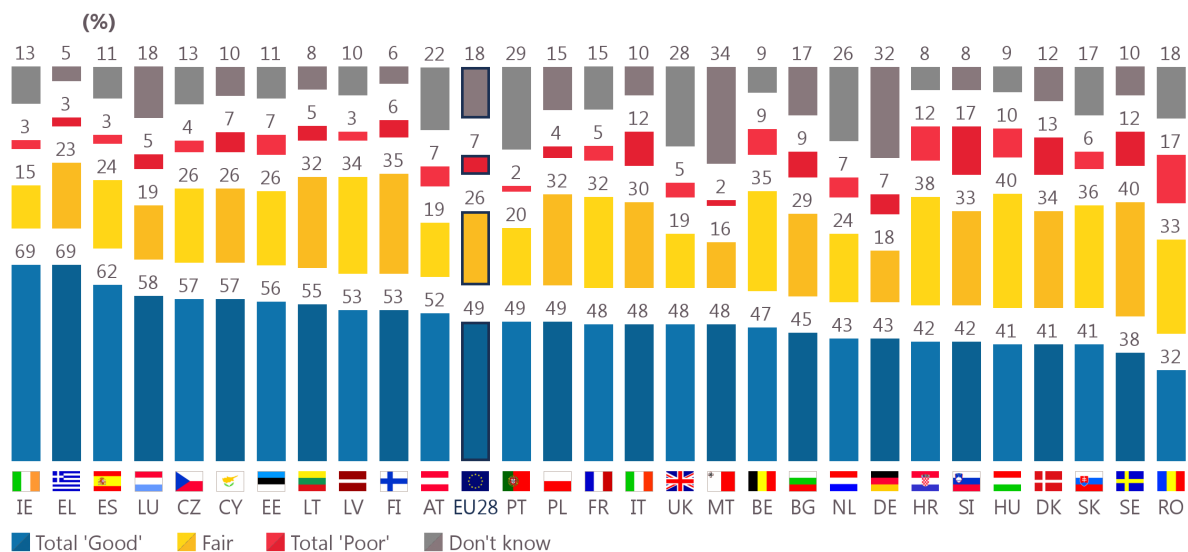
Base: all respondents (n=27,901)

Socio-demographic analysis reveals that respondents under the age of 25 are the most likely to consider coach services in their country as good (55%).

QE2T Rate/view of coach services (TOTAL) **(% - EU)**

	Total 'Good'	Fair	Total 'Poor'
EU28	49	26	7
Age			
15-24	55	29	5
25-39	47	30	7
40-54	46	27	8
55 +	48	23	7

2 Rating of specific aspects of coach services

– Safety at the terminal/stop and on the coach is rated as good by a majority of respondents who travel by coach –

Seven in ten respondents rate the feeling of safety at the terminal/stop and on the coach as good (70%), including almost one in five who rate this aspect as very good (19%)[8]. One in twenty respondents (5%) rate their feeling of safety at the terminal/stop and on the coach as poor, including 1% who rate it as very poor.

Nearly seven in ten respondents (69%) say that punctuality and reliability are good, with 19% rating it very good. Around one in twenty (5%) say it is poor, including 1% who rate it as very poor.

Nearly two-thirds of individuals (65%) rate fares and the ease of purchasing tickets as good, including almost one in five (19%) who say this aspect is very good. Fewer than one in ten (7%) say this aspect is poor, including 1% who say it is very poor.

Nearly two-thirds of respondents (65%) rate the comfort of travel as good, including almost one in five (17%) who say it is very good. Comfort of travel is considered as poor by fewer than one in ten respondents (6%), including 1% who say it is very poor.

Six in ten respondents (60%) rate the availability of integrated ticketing as good. One in six respondents (16%) rate this aspect as very good, while over four in ten (44%) say it is good. This aspect is rated poor by 6% of respondents, including 1% who say it is very poor. Finally, 14% of respondents were unable to answer this question, perhaps not understanding the concept.

The frequency of services is evaluated as good by six in ten people (60%), including almost one in seven respondents (14%) who rate it as very good. Just over a quarter (26%) rate the frequency of services as fair, while fewer than one in ten (8%) say this aspect is poor, including 1% who consider it as very poor.

Ease of connection with other modes of public transport is rated as good by nearly six in ten respondents (59%) including 13% of respondents who describe it as very good. Fewer than one in ten respondents (7%) consider ease of connection with other modes of public transport as poor, including 1% who rate it as very poor.

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[8] Thinking about your most recent trips by coach how would you rate it on the following aspects?

QE4   Thinking about your most recent trips by coach how would you rate it on the following aspects?
(% - EU)

Aspect	Very good	Good	Fair	Poor	Very poor	Don't know
FEELING SAFE WHILST AT TERMINAL/STOP AND ON COACH	19	51	22	4	1	3
PUNCTUALITY AND RELIABILITY	19	50	23	4	1	3
FARES AND EASE OF PURCHASING TICKETS	19	46	23	6	1	5
COMFORT OF TRAVEL	17	48	27	5	1	2
AVAILABILITY OF INTEGRATED TICKET (I.E. ONE TICKET FOR THE ENTIRE TRIP)	16	44	20	5	1	14
FREQUENCY OF SERVICES	14	46	26	7	1	6
EASE OF CONNECTION WITH OTHER MODES OF PUBLIC TRANSPORT	13	46	25	6	1	9

Very good   Good   Fair   Poor   Very poor   Don't know

Base: respondents who sometimes use coach services (n=10,918)

Despite the fact that seven in ten EU respondents rate as good the **feeling of safety at the terminal/stop and on the coach,** results vary considerably across Member States ranging from 91% in Ireland, 86% in Greece and 84% in Malta and the United Kingdom, to just 52% in Croatia, 48% in Hungary and 43% in Romania.

More than one third of respondents in Croatia (42%), Hungary (41%) and in Romania (37%) rate this aspect as fair.

Respondents are most likely to rate this aspect as poor in Romania (16%), the Czech Republic (11%), Hungary and Lithuania (both 10%), compared with United Kingdom, Ireland and Malta (all 1%).

QE4.5   Thinking about your most recent trips by coach how would you rate it on the following aspects?
Feeling safe whilst at terminal/stop and on coach (%)

	IE	EL	UK	MT	ES	AT	DE	CY	FI	NL	PT	EE	EU28	DK	IT	SE	LU	SK	LV	LT	PL	FR	BE	BG	SI	CZ	HR	HU	RO
Don't know	2	0	3	7	1	1	2	5	6	4	2	4	3	8	1	5	5	2	2	2	1	7	4	2	4	2	0	1	4
Total 'Poor'	1	2	1	1	4	3	2	2	2	3	3	4	5	5	9	7	5	4	2	10	5	3	7	5	7	11	6	10	16
Fair	6	12	12	8	14	16	18	17	18	19	23	20	22	18	23	21	24	28	31	25	31	28	28	32	32	30	42	41	37
Total 'Good'	91	86	84	84	81	80	78	76	74	74	72	72	70	69	67	67	66	66	65	63	63	62	61	61	57	57	52	48	43

■ Total 'Good'   ■ Fair   ■ Total 'Poor'   ■ Don't know
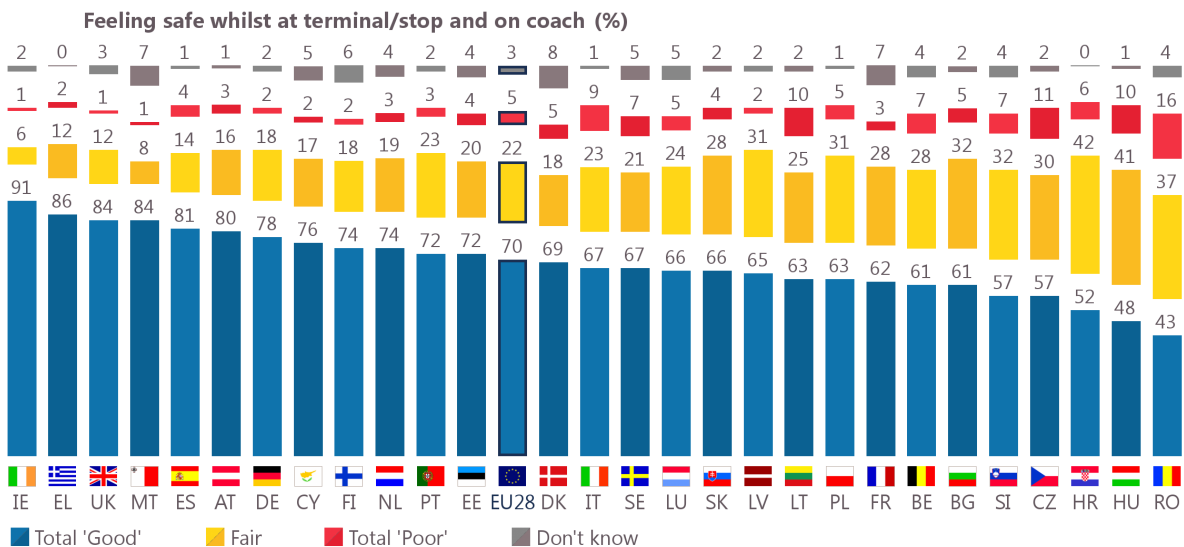
Base: respondents who sometimes use coach services (n=10,918)

In what concerns **punctuality and reliability** of coach services, a majority of respondents rate it as good in all Member States but one – Romania (43%). Nevertheless, results vary across countries ranging from more than eight in ten respondents in Ireland, Austria (both 86%), Spain (84%) and Greece (83%), to only slightly more than half of respondents in Belgium (55%), Croatia and, Hungary (both 53%) and around four in ten respondents in Romania (45%)

Respondents in Croatia (41%), Hungary (38%) and Romania (37%) are the most likely to rate punctuality and reliability as fair.

Respondents are most likely to this aspect as poor in Belgium (14%), Romania (13%) and Luxembourg (9%) and least likely to do so in Latvia, Finland, Cyprus and Lithuania (all 1%).

QE4.2 Thinking about your most recent trips by coach how would you rate it on the following aspects?

Punctuality and reliability (%)

	IE	AT	ES	EL	CY	FI	LT	MT	EE	CZ	UK	SK	PL	PT	LV	IT	EU28	DE	NL	SE	LU	DK	BG	FR	SI	BE	HR	HU	RO
Don't know	2	1	1	0	4	6	3	9	3	1	5	2	1	1	2	0	3	3	5	5	3	8	2	7	4	2	0	1	5
Total 'Poor'	2	2	3	2	1	1	1	5	3	3	6	2	3	5	1	7	5	4	5	5	9	8	6	6	5	14	6	8	13
Fair	10	11	12	15	16	15	18	8	18	21	15	24	25	23	27	24	23	25	22	23	23	22	31	26	31	29	41	38	37
Total 'Good'	86	86	84	83	79	78	78	78	76	75	74	72	71	71	70	69	69	68	68	67	65	62	61	61	60	55	53	53	45

■ Total 'Good' ▨ Fair ■ Total 'Poor' ■ Don't know
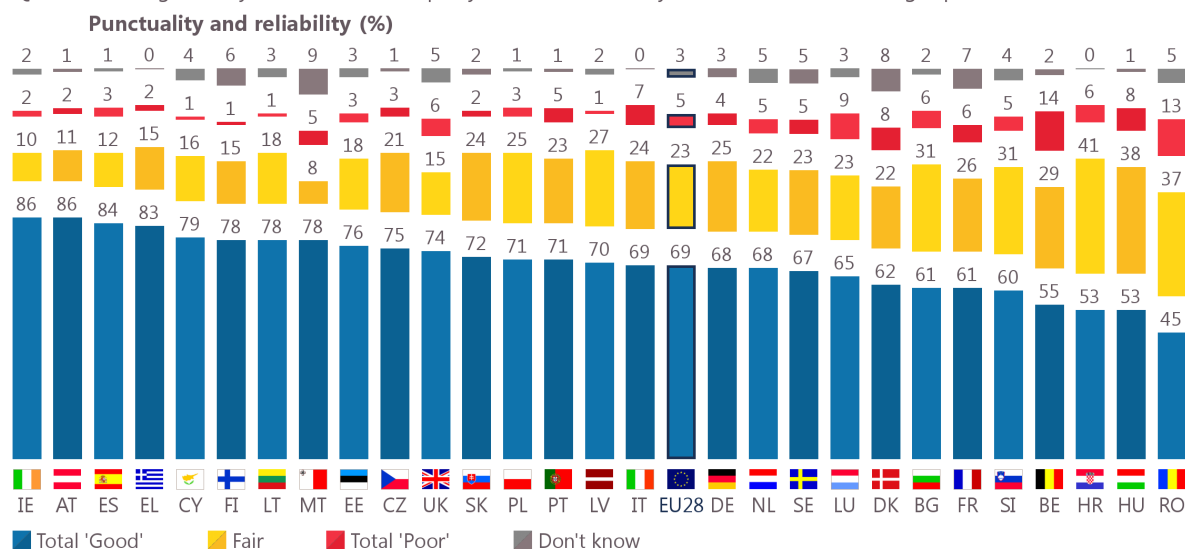
Base: respondents who sometimes use coach services (n=10,918)

A majority of respondents consider **fares and the ease of purchasing tickets** as good in most countries. More than eight in ten respondents do so in Germany (84%), Ireland (82%) and Cyprus (81%), compared with just around half in Bulgaria and Hungary (both 49%) and around four in ten people in Romania and Croatia (both 42%).

Around four in ten or more in Croatia (45%), Hungary (40%) and Bulgaria and Romania (both 38%) rate this aspect as fair.

Respondents are most likely to rate fares and the ease of purchasing tickets as poor in Denmark (19%), Lithuania (17%) and Romania (16%). This compares with 1% in Cyprus and Malta and 2% in Germany and Slovakia.

QE4.4 Thinking about your most recent trips by coach how would you rate it on the following aspects?

Fares and ease of purchasing tickets (%)
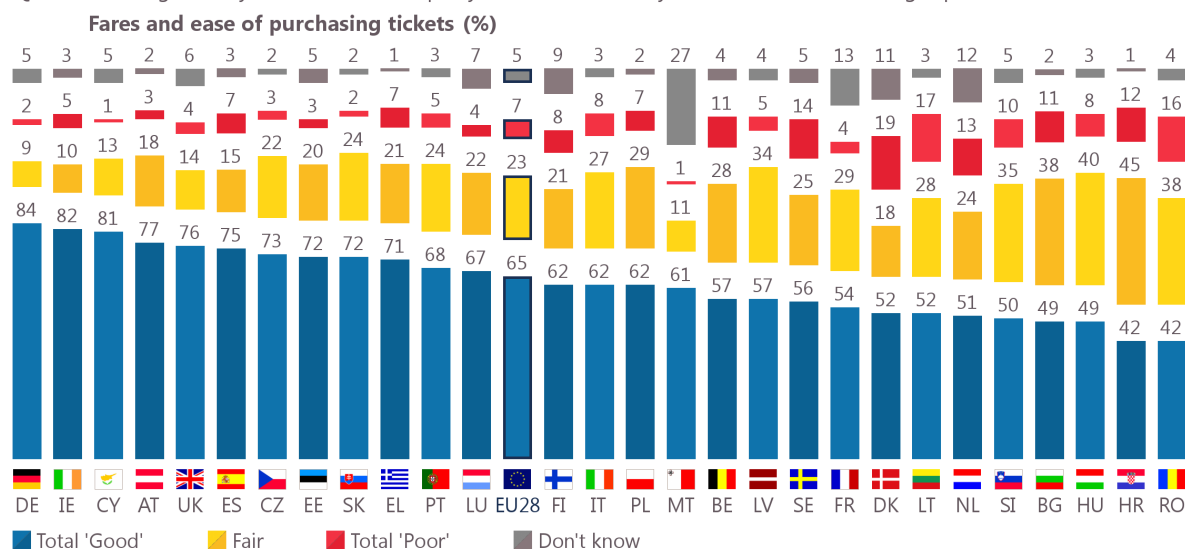
Base: respondents who sometimes use coach services (n=10,918)

The **comfort of travel is rated** as good in almost all countries, with the absolute majority of respondents doing so in all Member States but two – Romania (41%) and Croatia (49%). However, there is a great variety of results across Member States, which range from over eight in ten respondents who do so in Ireland (89%), Malta (83%) and Cyprus (81%) to just slightly over half in Bulgaria, Denmark (both 55%), Slovenia (54%) and Hungary (52%).

Again, respondents in Croatia (44%), Romania (40%) and Hungary (36%) are the most likely to rate this aspect as fair.

The comfort of travel is most likely to be rated as poor in Romania (16%), Hungary (11%) and Bulgaria (10%). This compares with Malta (1%) and Finland, Luxembourg and Cyprus (all 2%).

QE4.7 Thinking about your most recent trips by coach how would you rate it on the following aspects?

Comfort of travel (%)
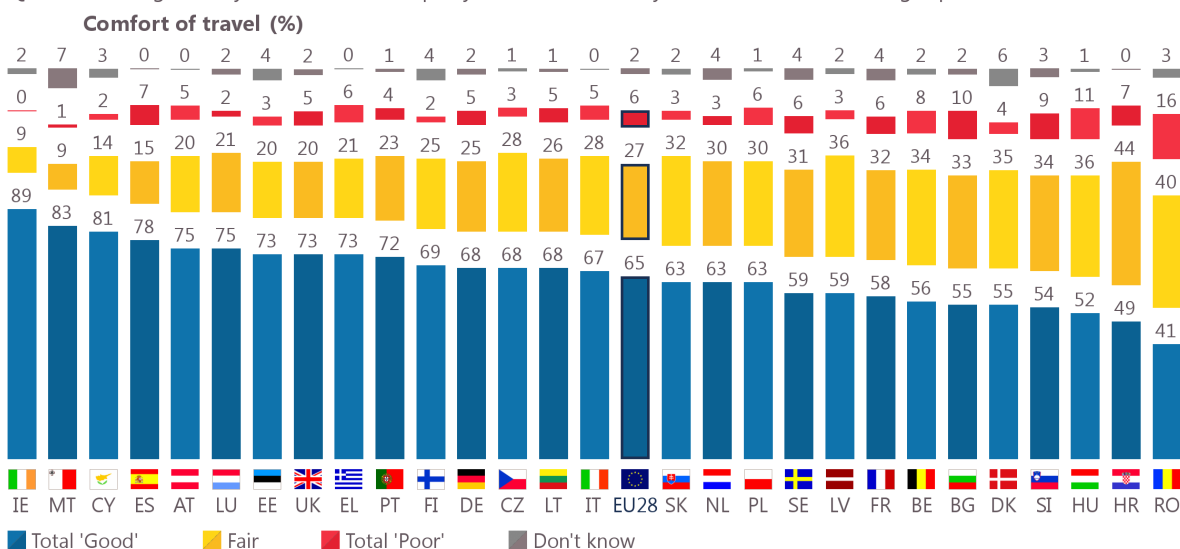
Base: respondents who sometimes use coach services (n=10,918)

In 21 Member States, at least half of the respondents rate the **availability of integrated tickets** as good, notably Greece (82%), Cyprus (77%), Austria and Ireland (both 76%). On the other end, only around four in ten respondents say this aspect is good in Romania (40%), Bulgaria (42%) and Croatia (44%).

Around four in ten respondents in Croatia (42%) and Romania (41%) and around one third in Hungary rate the availability of integrated tickets as fair.

The availability of integrated tickets is most likely to be seen as poor in Bulgaria and Romania (both 13%) and Slovenia (12%).

QE4.3 Thinking about your most recent trips by coach how would you rate it on the following aspects?

Availability of integrated ticket (i.e. one ticket for the entire trip) (%)
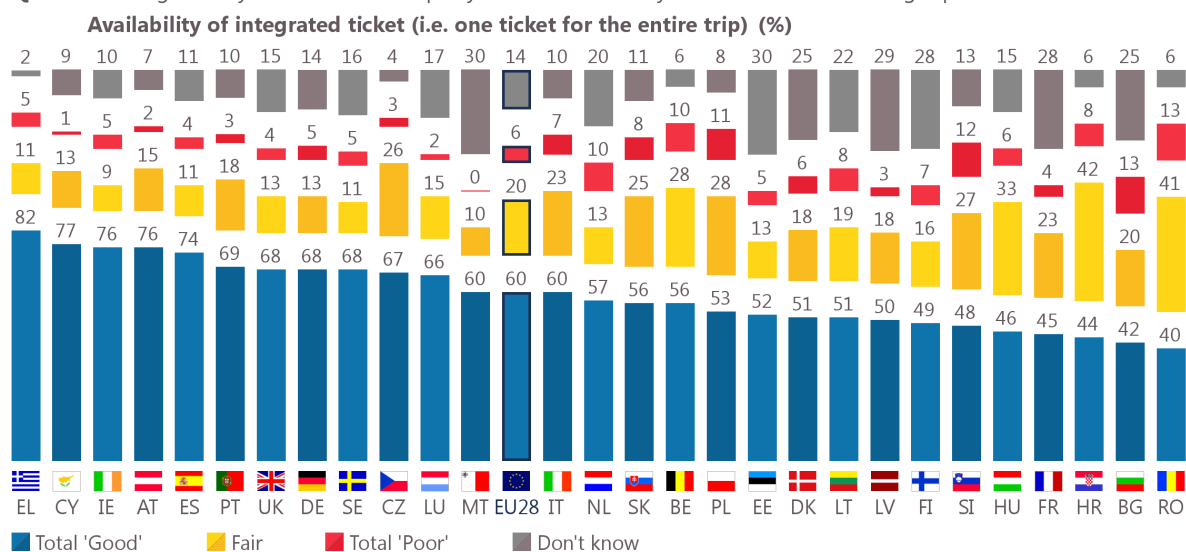
Base: respondents who sometimes use coach services (n=10,918)

A majority of respondents rate the **frequency of services** as good in the majority of countries, especially in Ireland (82%), Spain (76%) and Cyprus (74%). This compares with around four in ten in Romania, Denmark and Hungary (all 44%).

More than three in ten respondents in 11 Member States rate this aspect as fair, most notably in Croatia (43%), Hungary (36%) and Romania and Finland (both 35%).

Respondents in Hungary (19%), Romania (16%), and Denmark and Slovenia (both 15%) are the most likely to say the frequency of services is poor. Only a tiny fraction in Malta (2%), and Cyprus and Austria (both 3%) rated frequency as poor.

QE4.1 Thinking about your most recent trips by coach how would you rate it on the following aspects?

Frequency of services (%)
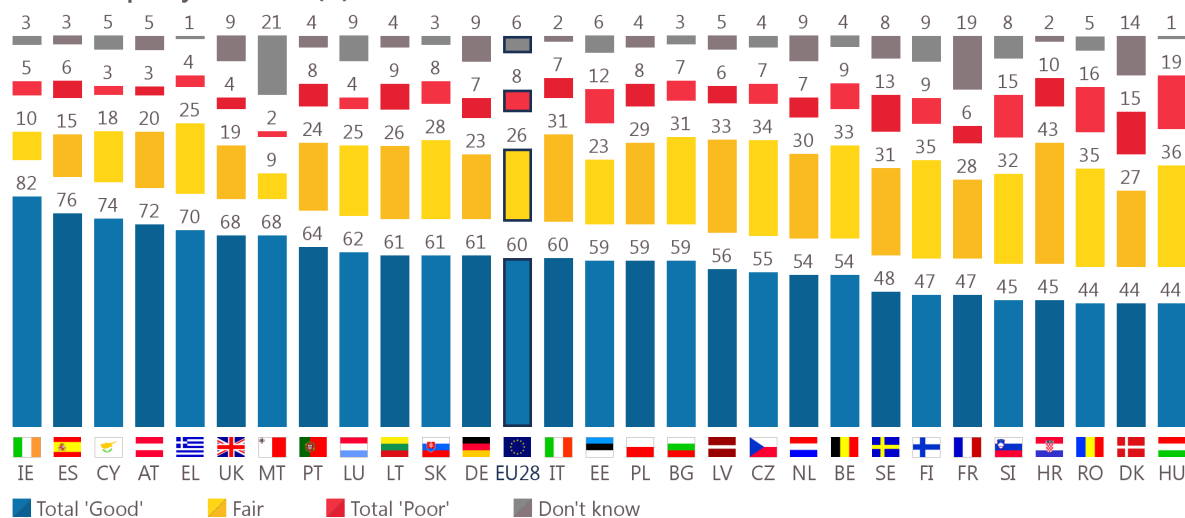
Base: respondents who sometimes use coach services (n=10,918)

The **ease of connection with other modes of public transport** is rated as good by a majority of respondents in most Member States, notably Ireland (82%), Cyprus (77%), and Austria and Spain (both 70%). This compares with around four in ten in Romania (37%), Croatia (41%) and Slovenia (42%).

The ease of connection with other modes of public transport is considered as fair by more than four in ten in Croatia (44%) and by slightly less than four in ten in Romania (38%) and Hungary (37%).

Ease of connection with other modes of public transport is most likely to be rated poorly in Romania (17%), Slovenia (16%) and Belgium (14%).

QE4.6 Thinking about your most recent trips by coach how would you rate it on the following aspects?
Ease of connection with other modes of public transport (%)

	IE	CY	ES	AT	UK	MT	DE	EL	LU	LT	PT	EU28	SE	PL	CZ	IT	SK	EE	BG	LV	DK	FI	BE	FR	NL	HU	SI	HR	RO
Don't know	5	6	7	4	11	22	7	4	10	10	5	9	11	5	5	8	6	19	11	11	20	20	6	21	11	7	8	4	8
Total 'Poor'	3	1	7	4	4		8	6	7	6	6	7	8	6	7	9	9	8	11	4	4	4	14	4	11	12	16	11	17
Fair	10	16	16	22	16	0 / 10	17	25	20	23	29	25	23	31	30	29	31	20	26	34	26	26	32	27	32	37	34	44	38
Total 'Good'	82	77	70	70	69	68	68	65	63	61	60	59	58	58	58	54	54	53	52	51	50	50	48	48	46	44	42	41	37

■ Total 'Good' ▨ Fair ■ Total 'Poor' ■ Don't know
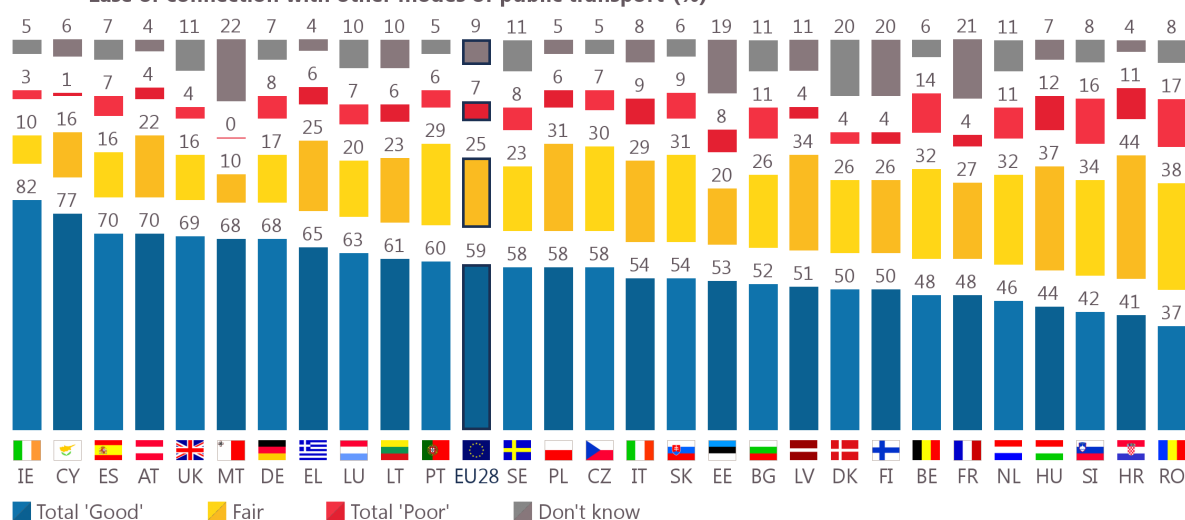
Base: respondents who sometimes use coach services (n=10,918)

Socio-demographic analysis does not reveal any significant differences by gender. People in the oldest age group are more likely than respondents in the 15 to 24 age group to rate as good the punctuality and reliability of coach services (73% vs 64%-69%) and the comfort of travel (70% vs 61%-64%). The youngest respondents are the most likely to rate the availability of integrated tickets as good (65% vs 58%-60%).

Those who left school at or before the age of 15 are the most likely to give a good rating to both the frequency of services (64% vs. 58%-60%) and the comfort of travel (72% vs. 63%-65%). Those who left school at or before the age of 15 are also the most likely to say the feeling of safety at the terminal/stop and on the coach is good (74% vs 68%-70%), for example, compared with those who finished education aged 16 to 19 (68%).

Respondents who never or almost never have difficulties paying bills are the most likely to rate as good the frequency of services (61% vs. 55%-57%), fares and the ease of purchasing tickets (69% vs. 58%-60%), ease of connection with other modes of public transport (60% vs. 51%-60%) and comfort of travel (68% vs. 60%-62%). The same applies to punctuality and reliability (73% vs. – 64%-65%) or the feeling of safety at the terminal/stop and on the coach (73% vs. 64%-65%).

QE4   Thinking about your most recent trips by coach how would you rate it on the following aspects?
        Total 'Good' (% - EU)

	Feeling safe whilst at terminal/stop and on coach	Punctuality and reliability	Comfort of travel	Fares and ease of purchasing tickets	Availability of integrated ticket (i.e. one ticket for the entire trip)	Frequency of services	Ease of connection with other modes of public transport
EU28	70	69	65	65	60	60	59
Age							
15-24	71	64	64	65	65	58	59
25-39	71	68	61	64	60	59	60
40-54	67	69	64	65	59	57	58
55 +	71	73	70	65	58	61	55
Education (End of)							
15-	74	73	72	67	62	64	57
16-19	68	69	65	65	59	59	57
20+	70	71	63	64	59	58	58
Still studying	69	65	64	67	65	60	62
Difficulties paying bills							
Most of the time	65	67	60	58	58	55	51
From time to time	64	65	62	60	58	57	56
Almost never/ Never	73	73	68	69	61	61	60

III. REASONS FOR TRAVELING BY COACH

Finally, respondents who use coach services were asked to name the main reasons why they do so. Those who never travel by coach were asked what might persuade them to use them.

1   Main reasons to travel by coach

– Low prices is the reason for using coach services most mentioned by respondents–

A third of respondents (33%) mentioned low prices as one of the reasons for using coach services recently[9]. Over a quarter (27%) have used coach services because they did not have a car. Fewer than one in five respondents have done so because of reliability of services (18%), comfort and cleanliness (17%), and the absence of any other options for the same destination (16%), while fewer than one in six give door-to-door convenience (14%), good connections with other transport (13%) and frequent services (11%) as reasons for using coach services. An extensive network of routes and stations is one of the main reasons to use coach services for fewer than one in ten individuals (8%), and just one in twenty respondents (5%) mentioned availability of integrated tickets as a reason for using coach services.

QE5a Why did you decide to travel by coach on these most recent trips? (MAX. 3 ANSWERS)
(% - EU)
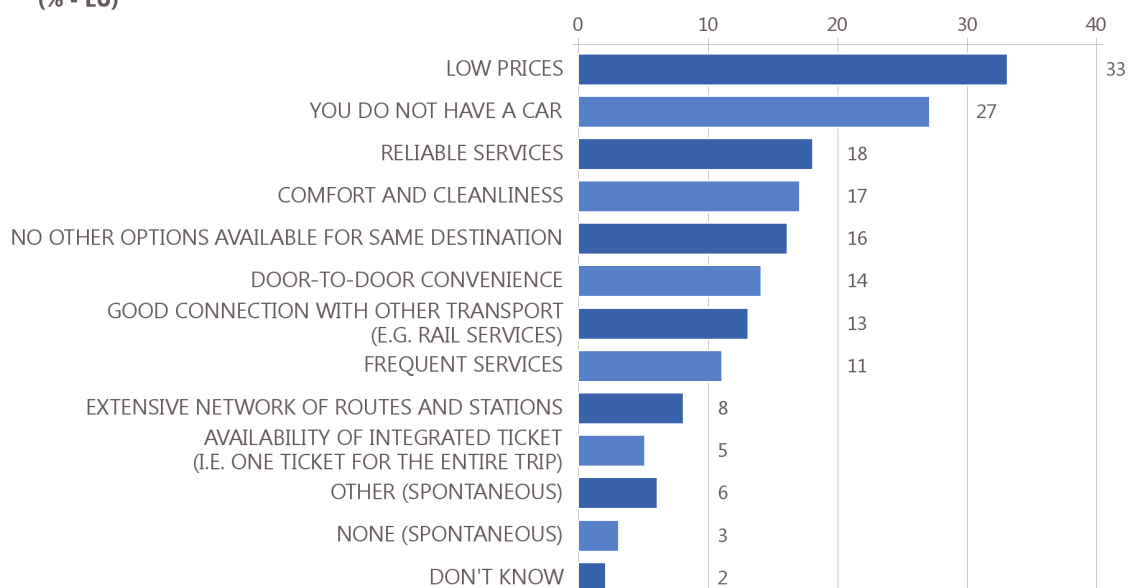
Base: respondents who use sometimes coach services (n=10,918)

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[9] Why did you decide to travel by coach on these most recent trips? (MAX. 3 ANSWERS)

Low prices is the reason most mentioned by respondents in 11 Member States, while not having a car is the first answer in 9 countries. In Sweden, an equal proportion of respondents who sometimes use coach services mention low prices and comfort and cleanliness.

QE5a   Why did you decide to travel by coach on these most recent trips? (MAX. 3 ANSWERS)
        (% – THE MOST MENTIONED ANSWER BY COUNTRY)
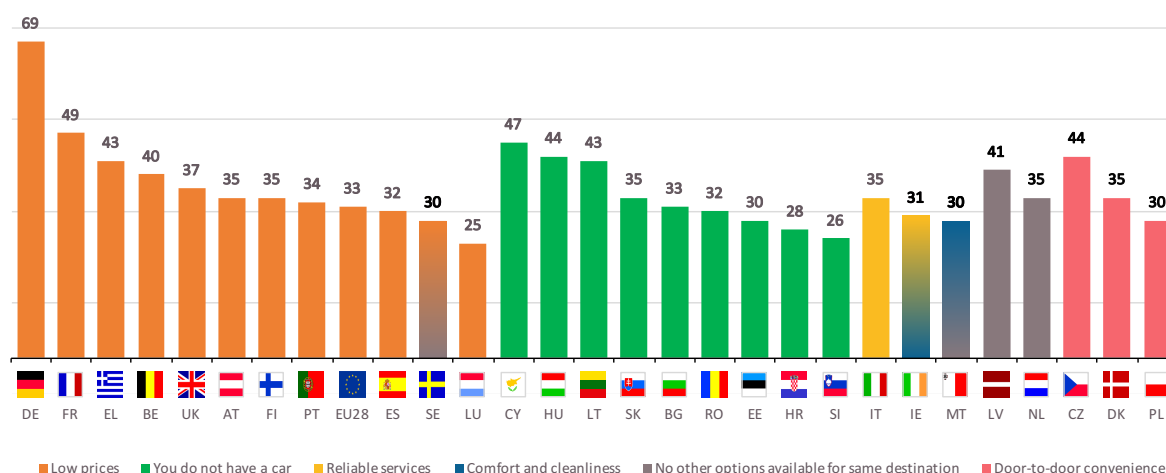
Base: respondents who sometimes use coach services (n=10,918)

At least four in ten in five countries say that they used coach services on their most recent trips because of low prices. Nearly seven in ten respondents in Germany (69%) give this reason, as do nearly half in France (49%) and Cyprus (46%). This aspect is mentioned the least by people in the Netherlands and Malta (both 10%) and Latvia (11%).

More than one third of respondents who sometimes use coach services say that they recently travelled by coach because they did not have a car in five countries, notably Cyprus (47%), Hungary (44%) and Lithuania (43%). This compares with Italy (19%), and Ireland and Luxembourg (both 20%).

Reliable services as a reason for choosing a coach trip is the most commonly mentioned answer in Italy (35%), Ireland (31%) and Portugal (30%). This compares with fewer than one in ten people in Denmark (7%), the Netherlands and Poland (both 9%).

Respondents in Portugal and Ireland (both 31%) and Malta (30%) are the most likely to mention comfort and cleanliness, while those in the Netherlands (3%), Denmark (7%) and Slovenia (8%) are the least likely to do so.

QE5a Why did you decide to travel by coach on these most recent trips? (MAX. 3 ANSWERS) **(%)**

	Low prices	You do not have a car	Reliable services	Comfort and cleanliness	No other options available for same destination	Door-to-door convenience	Good connection with other transport (e.g. rail services)	Frequent services	Extensive network of routes and stations	Availability of integrated ticket (i.e. one ticket for the entire trip)	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28	33	27	18	17	16	14	13	11	8	5	6	3	2
BE	40	26	17	16	15	13	11	6	9	6	8	2	0
BG	12	33	19	9	25	7	4	13	17	5	5	5	3
CZ	19	28	18	14	14	44	11	11	6	10	3	3	0
DK	29	30	7	7	19	35	12	4	3	6	13	1	2
DE	69	28	19	10	11	10	11	9	4	4	2	5	1
EE	18	30	16	22	28	12	8	13	4	4	9	3	1
IE	25	20	31	31	12	19	16	20	10	7	1	2	1
EL	43	34	21	13	18	5	8	13	8	11	9	0	0
ES	32	28	19	25	10	11	16	12	9	4	10	2	1
FR	49	26	14	12	10	7	7	5	10	2	6	4	2
HR	27	28	24	12	19	5	6	13	10	4	4	4	1
IT	27	19	35	29	7	10	24	16	14	8	5	2	0
CY	46	47	20	12	17	3	5	20	8	7	8	2	0
LV	11	32	11	13	41	8	6	10	6	1	4	4	1
LT	15	43	23	16	24	8	9	10	8	3	10	2	1
LU	25	20	17	23	11	11	15	12	12	4	13	4	3
HU	14	44	18	18	28	9	8	11	10	1	2	3	0
MT	10	21	23	30	30	25	15	8	4	5	6	1	4
NL	10	33	9	3	35	21	18	6	6	6	9	3	2
AT	35	24	23	29	16	19	16	12	15	12	10	2	1
PL	29	24	9	16	16	30	7	13	6	4	5	2	6
PT	34	29	30	31	9	11	8	10	8	6	5	6	1
RO	21	32	10	13	27	5	8	8	7	6	6	3	3
SI	21	26	20	8	21	11	10	9	7	5	13	4	1
SK	15	35	27	22	18	7	9	12	12	4	3	2	3
FI	35	26	13	9	23	4	16	13	11	4	9	2	3
SE	30	25	13	9	30	10	25	8	4	8	10	3	1
UK	37	22	15	14	11	17	12	9	4	4	2	6	2

1st MOST FREQUENTLY MENTIONED ITEM

2nd MOST FREQUENTLY MENTIONED ITEM

3rd MOST FREQUENTLY MENTIONED ITEM

Base: respondents who sometimes use coach services (n=10,918)

A review of the socio-demographic data shows that women (29%) are more likely than men (24%) to choose coach services because they do not have a car.

The youngest respondents – those aged between 15 and 24 (42%) – are more likely than respondents in the 40 to 54 age group (19%) to choose coach services because they do not have a car. They are also the most likely to mention low prices (41% vs. 26% of those aged 55 or over). Respondents aged 55 or over are the most likely to choose coach services for comfort and cleanliness (20% vs. 12% of those aged between 15 and 24) or reliability (21% vs. 16% of respondents in the two youngest age groups).

Respondents who left school aged 15 or younger are the most likely to use coach services because they do not have a car (31% vs. 19% of respondents who remained in education until age 20 or later), for comfort and cleanliness (23% vs. 14%) or for reliability (23% vs. 15%). Respondents who remained in education longest, however, are the most likely to mention low prices as a reason for traveling by coach (36% vs. 26% of those who left school at or before the age of 15).

Respondents who have difficulties paying their bills most of the time are the most likely to mention not having a car as a reason for using coach services (38% vs. 24% of those who never or almost never have financial difficulties).

QE5a   Why did you decide to travel by coach on these most recent trips? (MAX. 3 ANSWERS)
(% - EU)

	Low prices	You do not have a car	Reliable services	Comfort and cleanliness
EU28	33	27	18	17
Gender				
Man	33	24	18	17
Woman	33	29	18	16
Age				
15-24	41	42	16	12
25-39	39	24	16	14
40-54	31	19	18	18
55 +	26	25	21	20
Education (End of)				
15-	26	31	23	23
16-19	30	25	20	18
20+	36	19	15	14
Still studying	43	45	16	12
Difficulties paying bills				
Most of the time	32	38	19	13
From time to time	33	28	20	18
Almost never/ Never	34	24	17	17

2 Ways to encourage the use of coach services

– Almost four in ten respondents say that not having a car would make them more likely to travel by coach –

Among those who do not use coach services almost four in ten respondents (37%) say that if they did not have a car they would be more likely to travel by coach and over a quarter (26%) say that lower prices would make them more likely to choose coach services. Just around one in ten say that a more extensive network of routes and stations (11%) or better connections with other transport (10%) would encourage them to do so[10]. Fewer than one in ten respondents say that more reliable services, improved comfort and cleanliness, more frequent services and improved door-to-door convenience (all 9%) would make them more likely to travel by coach, and fewer than one in twenty (4%) mention the availability of integrated tickets.

One in five respondents (20%) say that none of these things would make them more likely to travel by coach.

QE5b What would make you more likely to travel by coach? (MAX. 3 ANSWERS)
(% - EU)

IF YOU DID NOT HAVE A CAR	37
LOWER PRICES	26
MORE EXTENSIVE NETWORK OF ROUTES AND STATIONS	11
BETTER CONNECTION WITH OTHER TRANSPORT (E.G. RAIL SERVICES)	10
MORE FREQUENT SERVICES	9
IMPROVED COMFORT AND CLEANLINESS	9
MORE RELIABLE SERVICES	9
IMPROVED DOOR-TO-DOOR CONVENIENCE	9
AVAILABILITY OF INTEGRATED TICKET (I.E. ONE TICKET FOR THE ENTIRE TRIP)	4
OTHER (SPONTANEOUS)	4
NONE (SPONTANEOUS)	20
DON'T KNOW	9
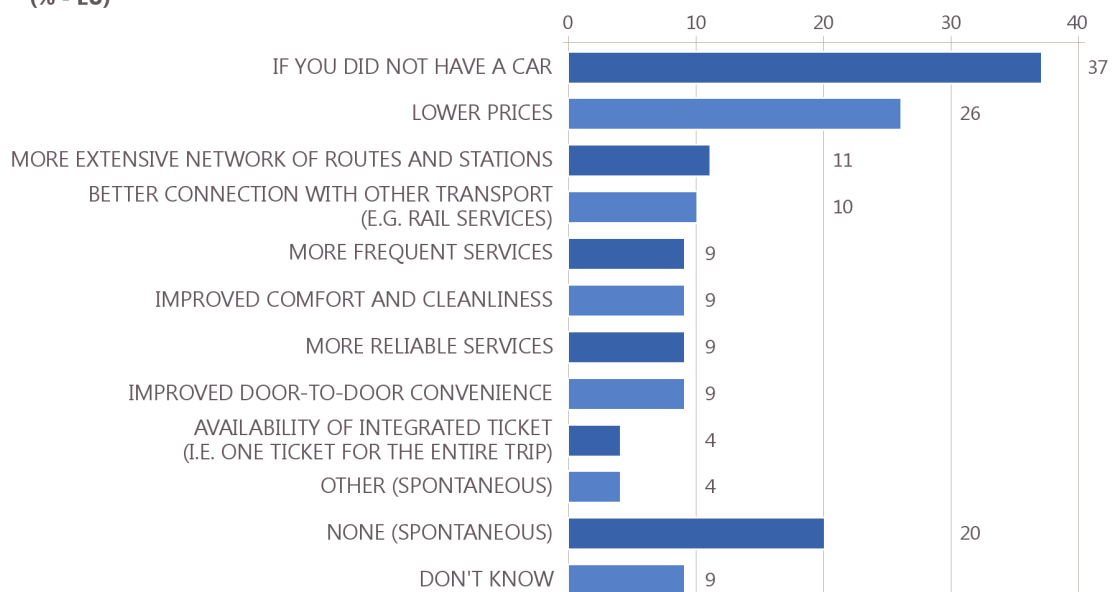
Base: respondents who do not use coach services (n=16,983)

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[10] What would make you more likely to travel by coach? (MAX. 3 ANSWERS)

In all Member States but one, **not having a car** is the most mentioned reason that would make respondents who do not use coach services more likely to travel by coach. The only exception is France, where the most frequently cited response is 'lower prices'.

QE5b   What would make you more likely to travel by coach? (MAX. 3 ANSWERS)
         (% - THE MOST MENTIONED ANSWER BY COUNTRY)
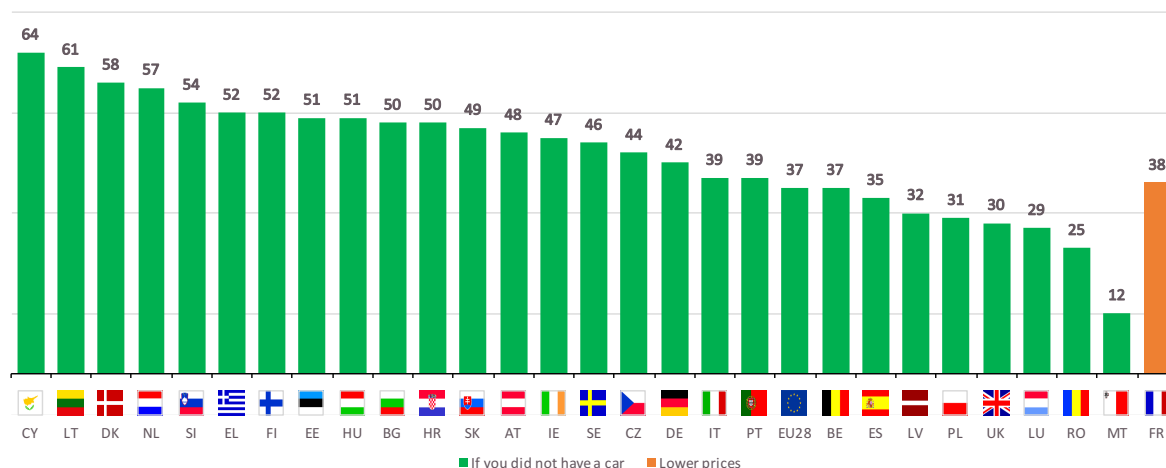
Base: respondents who do not use coach services (n=16,983)

Almost two-thirds of respondents in Cyprus (64%) and Lithuania (61%) and nearly six in ten in Denmark (58%) say that they **would be more likely to travel by coach if they did not have a car**. This compares with Malta (12%), Romania (25%), and France and Luxembourg (both 29%).

Lower prices are most likely to be mentioned in France (38%), Greece (37%) and Cyprus (31%), compared with around one in ten in Malta (8%), Luxembourg (12%) and Finland (13%).

Other responses are cited by less than a quarter of respondents who do not use coach services in all countries.

More than one quarter in four countries – Malta (33%), Germany and the United Kingdom (both 29%), and Luxembourg (26%) – say that none of these would make them more likely to travel by coach.

QE5b   What would make you more likely to travel by coach? (MAX. 3 ANSWERS)
(%)

	If you did not have a car	Lower prices	More extensive network of routes and stations	Better connection with other transport (e.g. rail services)	More frequent services	Improved comfort and cleanliness	More reliable services	Improved door-to-door convenience	Availability of integrated ticket (i.e. one ticket for the entire trip)	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28	37	26	11	10	9	9	9	9	4	4	20	9
BE	37	29	13	12	11	13	12	14	9	9	11	2
BG	50	19	7	4	5	12	9	6	3	2	18	13
CZ	44	22	6	5	8	11	6	10	6	5	15	7
DK	58	27	10	11	14	4	6	20	8	6	9	2
DE	42	26	11	11	7	4	12	6	3	1	29	8
EE	51	15	8	3	4	4	4	7	1	6	19	12
IE	47	21	8	10	13	6	12	10	5	5	10	9
EL	52	37	9	5	18	15	10	4	1	3	16	2
ES	35	25	8	8	10	10	4	5	2	6	25	8
FR	29	38	16	11	8	12	6	13	6	5	14	7
HR	50	29	8	3	11	9	4	4	2	6	10	8
IT	39	23	16	12	14	9	16	8	5	5	11	9
CY	64	31	15	5	15	9	9	7	4	7	9	3
LV	32	22	5	5	10	14	3	3	3	6	21	10
LT	61	27	6	5	8	3	7	10	3	4	12	7
LU	29	12	10	15	11	9	8	9	5	12	26	6
HU	51	20	4	6	12	12	10	10	2	3	18	4
MT	12	8	2	4	4	7	7	4	3	6	33	33
NL	57	22	18	22	14	6	6	19	7	3	10	4
AT	48	28	10	7	13	7	11	12	6	6	18	7
PL	31	24	7	4	9	8	5	9	5	6	18	12
PT	39	15	9	4	4	4	3	3	2	16	20	10
RO	25	20	10	7	6	14	5	4	3	6	22	15
SI	54	16	14	9	10	5	8	5	5	8	18	2
SK	49	19	7	5	10	13	9	5	2	6	10	11
FI	52	13	13	11	11	4	2	5	10	4	14	8
SE	46	19	15	11	10	15	2	14	13	9	16	4
UK	30	18	5	7	6	10	8	8	2	1	29	13

1st MOST FREQUENTLY MENTIONED ITEM
2nd MOST FREQUENTLY MENTIONED ITEM
3rd MOST FREQUENTLY MENTIONED ITEM

Base: respondents who do not use coach services (n=16,983)

A review of the socio-demographic data breakdown does not show notable differences by gender. The youngest respondents – those aged between 15 and 24 – are the most likely to say that lower prices (34% compared with 22% of respondents aged 55 or over) or a more extensive network of routes and stations (14% vs. 9%) would make them more likely to travel by coach. Respondents in the 25 to 39 and 40 to 54 ages groups are the most likely to say that they would be more likely to choose coach services if did they did not have a car (both 43%).

Respondents who completed their education aged 20 or over are the most likely to say they would be more likely to use coach services if they had no car (42%), for example, compared with those who left school before the age of 15, who are the least likely to say so (29%).

Those who have difficulty in paying their bills most of the time (35%) are more likely than those who never do so (23%) to say that lower prices would make them more likely to travel by coach. However, those who never or almost never have financial difficulties are the most likely to say that the absence of a car would encourage them to choose coach services (38% vs. 32% of those who struggle to pay their household bills most of the time).

QE5b	What would make you more likely to travel by coach? (MAX. 3 ANSWERS) (% - EU)		
		If you did not have a car	Lower prices
EU28		37	26
Gender			
Man		38	25
Woman		37	26
Age			
15-24		35	34
25-39		43	28
40-54		43	26
55 +		31	22
Education (End of)			
15-		29	24
16-19		39	26
20+		42	23
Still studying		35	36
Difficulties paying bills			
Most of the time		32	35
From time to time		37	31
Almost never/ Never		38	23

CONCLUSION

This Special Eurobarometer survey has considered citizens' use of and attitudes towards domestic and international coach services. Its main findings include the fact that only a minority of respondents use coach services, whether regularly or infrequently; that most coach journeys are for leisure purposes; that less than half of all citizens rate coach services as good overall; and that not having a car is the most likely reason that would persuade non-coach users to travel by coach.

At country level, it emerged a pattern that is worth to be highlighted: respondents in Ireland, Spain, Cyprus and Malta were the most likely to be satisfied with coach services, while respondents in Croatia, Hungary and Romania were systematically the more likely to be dissatisfied or to give an intermediate rate to the various aspects tested.

Around a third of respondents (35%) use coach services for domestic travel and 18% for international travel. Those who do travel by coach are most likely to do so to visit family and friends (34%), to go on holiday (27%) or for other leisure purposes (24%). Relatively few coach journeys are made for business, work or education.

Over six in ten coach service users (64%) rate their domestic services as good, but this falls to 38% among respondents who never travel by coach. Feeling safe, punctuality and reliability, fares and comfort are the aspects of coach travel that users rate most highly. Fewer than one in twenty respondents (5%) say that coach services are poor, including 1% who rate them as very poor.

Low prices (33%), not having a car (27%) and reliability (18%) are the three main reasons why coach travellers choose this mode of transport. Nonetheless, the report reveals a reluctance on the part of citizens who do not make use of coach services to adopt this method of travel. When respondents who never travel by coach are asked what improvements or changes would make them more likely to do so, almost one in four (37%) say that would be more inclined to take the coach if they did not have a car, and just over a quarter (26%) said that lower prices would influence them.

Around 1 in 10 (11%) of non-coach travellers would be more likely to use coaches if there were a more extensive network or routes and stations, and fewer than one in ten respondents say that the other suggested improvements to reliability, comfort or convenience would be likely to convince them to make the switch. A fifth (20%) of those who never travel by coach actually say that none of these changes would make them more likely to do so.

To conclude, persuading the majority who never use coach services to consider doing so remains a challenge.

TECHNICAL SPECIFICATIONS

Between the 18th and the 27th of March 2017, TNS opinion & social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the wave 87.1 of the EUROBAROMETER survey, at the request of the European Commission, Directorate-General for Communication, "Strategic Communication" Unit.

The wave 87.1 includes the SPECIAL EUROBAROMETER 457 and covers the population of the respective nationalities of the European Union Member States, resident in each of the 28 Member States and aged 15 years and over.

	COUNTRIES	INSTITUTES	N° INTERVIEWS	DATES FIELDWORK		POPULATION 15+	PROPORTION EU28
BE	Belgium	TNS Dimarso	1,023	18/03/2017	27/03/2017	9,693,779	2.25%
BG	Bulgaria	TNS BBSS	1,044	18/03/2017	27/03/2017	6,537,535	1.52%
CZ	Czech Rep.	TNS Aisa	1,058	18/03/2017	27/03/2017	9,238,431	2.14%
DK	Denmark	TNS Gallup DK	1,000	18/03/2017	27/03/2017	4,838,729	1.12%
DE	Germany	TNS Infratest	1,537	18/03/2017	27/03/2017	70,160,634	16.26%
EE	Estonia	TNS Emor	1,017	18/03/2017	27/03/2017	1,160,064	0.27%
IE	Ireland	Behaviour & Attitudes	1,021	18/03/2017	27/03/2017	3,592,162	0.83%
EL	Greece	TNS ICAP	1,010	18/03/2017	27/03/2017	9,937,810	2.30%
ES	Spain	TNS Spain	1,024	18/03/2017	27/03/2017	39,445,245	9.14%
FR	France	TNS Sofres	1,004	18/03/2017	27/03/2017	54,097,255	12.54%
HR	Croatia	HENDAL	1,048	18/03/2017	26/03/2017	3,796,476	0.88%
IT	Italy	TNS Italia	1,022	18/03/2017	25/03/2017	52,334,536	12.13%
CY	Rep. Of Cyprus	CYMAR	501	18/03/2017	25/03/2017	741,308	0.17%
LV	Latvia	TNS Latvia	1,004	18/03/2017	27/03/2017	1,707,082	0.40%
LT	Lithuania	TNS LT	1,001	18/03/2017	27/03/2017	2,513,384	0.58%
LU	Luxembourg	TNS ILReS	510	18/03/2017	25/03/2017	457,127	0.11%
HU	Hungary	TNS Hoffmann	1,053	18/03/2017	27/03/2017	8,781,161	2.04%
MT	Malta	MISCO	500	18/03/2017	27/03/2017	364,171	0.08%
NL	Netherlands	TNS NIPO	1,015	18/03/2017	27/03/2017	13,979,215	3.24%
AT	Austria	ipr Umfrageforschung	1,001	18/03/2017	27/03/2017	7,554,711	1.75%
PL	Poland	TNS Polska	1,008	18/03/2017	27/03/2017	33,444,171	7.75%
PT	Portugal	TNS Portugal	1,061	18/03/2017	26/03/2017	8,480,126	1.97%
RO	Romania	TNS CSOP	1,033	18/03/2017	27/03/2017	16,852,701	3.91%
SI	Slovenia	Mediana	1,027	18/03/2017	27/03/2017	1,760,032	0.41%
SK	Slovakia	TNS Slovakia	1,014	18/03/2017	26/03/2017	4,586,024	1.06%
FI	Finland	TNS Gallup Oy	1,012	18/03/2017	27/03/2017	4,747,810	1.10%
SE	Sweden	TNS Sifo	1,007	18/03/2017	27/03/2017	7,998,763	1.85%
UK	United Kingdom	TNS UK	1,346	18/03/2017	27/03/2017	52,651,777	12.20%
	TOTAL EU28		27,901	18/03/2017	27/03/2017	431,452,219	100%*

* It should be noted that the total percentage shown in this table may exceed 100% due to rounding

The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II[1] (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas.

In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview)* was used in those countries where this technique was available.

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS opinion & social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed here.

Readers are reminded that survey results are <u>estimations</u>, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process
(at the 95% level of confidence)

various sample sizes are in rows   *various observed results are in columns*

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6.0	8.3	9.9	11.1	12.0	12.7	13.2	13.6	13.8	13.9	N=50
N=500	1.9	2.6	3.1	3.5	3.8	4.0	4.2	4.3	4.4	4.4	N=500
N=1000	**1.4**	**1.9**	**2.2**	**2.5**	**2.7**	**2.8**	**3.0**	**3.0**	**3.1**	**3.1**	**N=1000**
N=1500	1.1	1.5	1.8	2.0	2.2	2.3	2.4	2.5	2.5	2.5	N=1500
N=2000	1.0	1.3	1.6	1.8	1.9	2.0	2.1	2.1	2.2	2.2	N=2000
N=3000	0.8	1.1	1.3	1.4	1.5	1.6	1.7	1.8	1.8	1.8	N=3000
N=4000	0.7	0.9	1.1	1.2	1.3	1.4	1.5	1.5	1.5	1.5	N=4000
N=5000	0.6	0.8	1.0	1.1	1.2	1.3	1.3	1.4	1.4	1.4	N=5000
N=6000	0.6	0.8	0.9	1.0	1.1	1.2	1.2	1.2	1.3	1.3	N=6000
N=7000	0.5	0.7	0.8	0.9	1.0	1.1	1.1	1.1	1.2	1.2	N=7000
N=7500	0.5	0.7	0.8	0.9	1.0	1.0	1.1	1.1	1.1	1.1	N=7500
N=8000	0.5	0.7	0.8	0.9	0.9	1.0	1.0	1.1	1.1	1.1	N=8000
N=9000	0.5	0.6	0.7	0.8	0.9	0.9	1.0	1.0	1.0	1.0	N=9000
N=10000	0.4	0.6	0.7	0.8	0.8	0.9	0.9	1.0	1.0	1.0	N=10000
N=11000	0.4	0.6	0.7	0.7	0.8	0.9	0.9	0.9	0.9	0.9	N=11000
N=12000	0.4	0.5	0.6	0.7	0.8	0.8	0.9	0.9	0.9	0.9	N=12000
N=13000	0.4	0.5	0.6	0.7	0.7	0.8	0.8	0.8	0.9	0.9	N=13000
N=14000	0.4	0.5	0.6	0.7	0.7	0.8	0.8	0.8	0.8	0.8	N=14000
N=15000	0.3	0.5	0.6	0.6	0.7	0.7	0.8	0.8	0.8	0.8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

[1] Figures updated in August 2015

QUESTIONNAIRE

INT.: (READ OUT) The next few questions are about coach services. By coach services, we mean scheduled, non-urban services which are open to everyone and have a published timetable, such as those that travel between cities or countries and where, for example, you have the possibility to stow luggage. It does not mean other services such as urban bus services, privately hired services or package tours.

ASK ALL

QE1 **How often do you use coach services to travel…**

(SHOW SCREEN – READ OUT – ONE ANSWER PER LINE)

		Several times a week	Several times a month	Several times a year	Once a year or less	Never	DK
1	…to other locations in (OUR COUNTRY)?	1	2	3	4	5	6
2	…to locations in other countries?	1	2	3	4	5	6

NEW

ASK QE2a IF USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS (CODE 1,2,3 OR 4 IN QE1.1 OR QE1.2)

QE2a **Overall how do you rate coach services in (OUR COUNTRY)?**

(SHOW SCREEN – READ OUT – ONE ANSWER ONLY)

Very Good	1
Good	2
Fair	3
Poor	4
Very Poor	5
DK	6

NEW

ASK QE2b IF DO NOT USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS (CODES 5 OR 6 IN QE1.1 AND QE1.2)

QE2b   **Which of the following best describes your view of coach services in (OUR COUNTRY)?**

(SHOW SCREEN – READ OUT – ONE ANSWER ONLY)

Very Good	1
Good	2
Fair	3
Poor	4
Very Poor	5
DK	6

NEW

ASK QE3, QE4 AND QE5a IF USE COACH SERVICES AT LEAST ONCE A YEAR (CODES 1,2,3 OR 4 IN QE1.1 OR QE1.2)

QE3   **Which were the main purposes of the coach trips you have made recently?**

(SHOW SCREEN – READ OUT – MAX. 3 ANSWERS)

Travel to place of education	1,
Travel to work	2,
Business trip	3,
To go on holiday	4,
Weekend break	5,
Visit family/friends	6,
Other leisure	7,
Travel to or from airport	8,
Travel to or from rail station	9,
Other	10,
DK	11,

NEW

QE4 **Thinking about your most recent trips by coach how would you rate it on the following aspects?**

(SHOW SCREEN – READ OUT – ONE ANSWER PER LINE)

		Very good	Good	Fair	Poor	Very poor	DK
1	Frequency of services	1	2	3	4	5	6
2	Punctuality and reliability	1	2	3	4	5	6
3	Availability of integrated ticket (i.e. one ticket for the entire trip)	1	2	3	4	5	6
4	Fares and ease of purchasing tickets	1	2	3	4	5	6
5	Feeling safe whilst at terminal/stop and on coach	1	2	3	4	5	6
6	Ease of connection with other modes of public transport	1	2	3	4	5	6
7	Comfort of travel	1	2	3	4	5	6

NEW

QE5a **Why did you decide to travel by coach on these most recent trips?**

(SHOW SCREEN – READ OUT – MAX. 3 ANSWERS)

Low prices	1,
Frequent services	2,
Reliable services	3,
You do not have a car	4,
Comfort and cleanliness	5,
Door-to-door convenience	6,
Good connection with other transport (e.g. rail services)	7,
Extensive network of routes and stations	8,
Availability of integrated ticket (i.e. one ticket for the entire trip)	9,
No other options available for same destination	10,
Other (SPONTANEOUS)	11,
None (SPONTANEOUS)	12,
DK	13,

NEW

QE5b   **What would make you more likely to travel by coach?**
(SHOW SCREEN – READ OUT – MAX. 3 ANSWERS)

Lower prices	1,
More frequent services	2,
More reliable services	3,
If you did not have a car	4,
Improved comfort and cleanliness	5,
Improved door-to-door convenience	6,
Better connection with other transport (e.g. rail services)	7,
More extensive network of routes and stations	8,
Availability of integrated ticket (i.e. one ticket for the entire trip)	9,
Other (SPONTANEOUS)	10,
None (SPONTANEOUS)	11,
DK	12,

NEW

QE1.1 How often do you use coach services to travel…
… to other locations in (OUR COUNTRY)? (%)

		Several times a week	Several times a month	Several times a year	Once a year or less	Never	Don't know	Total 'At least once a year or less'
EU28		2	4	11	18	64	1	35
BE		2	3	12	13	70	0	30
BG		5	9	27	25	33	1	66
CZ		3	5	21	20	50	1	49
DK		5	3	14	20	58	0	42
DE		0	0	6	12	82	0	18
EE		4	12	31	26	27	0	73
IE		3	6	19	20	52	0	48
EL		1	4	21	38	36	0	64
ES		1	3	12	24	60	0	40
FR		1	2	5	10	82	0	18
HR		2	7	19	25	46	1	53
IT		3	5	11	16	64	1	35
CY		4	4	11	20	61	0	39
LV		3	11	24	30	31	1	68
LT		8	15	19	19	39	0	61
LU		16	11	18	9	45	1	54
HU		9	14	20	14	43	0	57
MT		2	3	10	20	61	4	35
NL		4	5	17	11	63	0	37
AT		1	3	8	15	73	0	27
PL		1	7	15	22	54	1	45
PT		1	3	9	17	70	0	30
RO		4	3	12	24	55	2	43
SI		5	5	17	16	57	0	43
SK		3	5	20	18	53	1	46
FI		4	7	23	34	31	1	68
SE		4	4	20	37	35	0	65
UK		0	2	10	25	63	0	37

QE1.2 How often do you use coach services to travel…
… to locations in other countries? (%)

		Several times a week	Several times a month	Several times a year	Once a year or less	Never	Don't know	Total 'At least once a year or less'
EU28		0	1	4	13	81	1	18
BE		0	1	7	19	72	1	27
BG		0	1	5	21	72	1	27
CZ		0	1	5	23	69	2	29
DK		0	1	2	16	80	1	19
DE		0	0	3	9	88	0	12
EE		1	1	9	28	59	2	39
IE		1	2	8	15	74	0	26
EL		1	1	2	16	80	0	20
ES		0	1	2	10	87	0	13
FR		0	0	2	10	88	0	12
HR		0	4	8	23	64	1	35
IT		2	2	5	11	79	1	20
CY		3	2	11	28	56	0	44
LV		0	1	8	32	59	0	41
LT		1	1	5	21	72	0	28
LU		3	3	13	15	65	1	34
HU		0	4	5	11	80	0	20
MT		1	0	7	39	49	4	47
NL		0	0	3	11	86	0	14
AT		0	3	5	16	76	0	24
PL		0	3	5	18	73	1	26
PT		0	2	2	5	90	1	9
RO		1	1	6	16	74	2	24
SI		1	1	8	22	68	0	32
SK		0	1	7	21	69	2	29
FI		0	1	5	28	65	1	34
SE		0	0	1	22	76	1	23
UK		0	0	5	15	79	1	20

QE2a Overall how do you rate coach services in (OUR COUNTRY)?
(%)

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Very Good	Good	Fair	Poor	Very Poor	Don't know	Total 'Good'	Total 'Poor'
EU28	15	49	27	4	1	4	64	5
BE	14	49	27	8	1	1	63	9
BG	9	46	32	7	3	3	55	10
CZ	17	55	26	1	1	0	72	2
DK	13	33	35	13	2	4	46	15
DE	15	58	15	4	2	6	73	6
EE	19	45	26	5	1	4	64	6
IE	35	49	11	1	1	3	84	2
EL	18	57	21	3	0	1	75	3
ES	17	66	14	2	0	1	83	2
FR	20	40	33	2	0	5	60	2
HR	12	39	39	6	2	2	51	8
IT	11	54	30	4	1	0	65	5
CY	17	41	31	5	1	5	58	6
LV	9	50	34	2	0	5	59	2
LT	7	53	35	3	1	1	60	4
LU	35	41	18	3	0	3	76	3
HU	7	44	39	8	1	1	51	9
MT	7	53	15	1	1	23	60	2
NL	11	54	24	5	1	5	65	6
AT	31	48	17	1	0	3	79	1
PL	9	48	34	4	1	4	57	5
PT	15	57	24	3	0	1	72	3
RO	10	33	38	12	4	3	43	16
SI	8	43	32	10	4	3	51	14
SK	12	47	36	3	0	2	59	3
FI	15	44	33	5	1	2	59	6
SE	11	33	40	10	2	4	44	12
UK	22	43	22	3	2	8	65	5

QE2b Which of the following best describes your view of coach services in (OUR COUNTRY)? **(%)**

(IF 'DO NOT USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 5 OU 6 IN QE1.1 AND QE1.2)

	Very Good	Good	Fair	Poor	Very Poor	Don't know	Total 'Good'	Total 'Poor'
EU28	5	33	26	6	2	28	38	8
BE	4	33	39	8	2	14	37	10
BG	1	20	23	8	1	47	21	9
CZ	8	31	26	6	1	28	39	7
DK	8	28	32	10	3	19	36	13
DE	4	32	18	4	3	39	36	7
EE	6	26	26	7	2	33	32	9
IE	10	42	19	4	1	24	52	5
EL	10	45	27	3	1	14	55	4
ES	3	44	31	2	1	19	47	3
FR	7	38	31	5	1	18	45	6
HR	5	24	37	13	5	16	29	18
IT	0	37	30	13	5	15	37	18
CY	10	46	18	7	1	18	56	8
LV	2	33	34	3	1	27	35	4
LT	4	43	25	5	1	22	47	6
LU	6	22	20	5	2	45	28	7
HU	3	21	42	10	4	20	24	14
MT	5	28	17	1	0	49	33	1
NL	3	25	24	7	1	40	28	8
AT	6	33	20	8	2	31	39	10
PL	6	34	28	3	1	28	40	4
PT	2	36	19	1	0	42	38	1
RO	5	18	29	11	6	31	23	17
SI	3	30	34	16	5	12	33	21
SK	1	23	36	6	3	31	24	9
FI	5	32	38	7	2	16	37	9
SE	4	23	38	9	3	23	27	12
UK	10	25	17	5	1	42	35	6

QE2T Rate/ view of coach services - TOTAL
(%)

		Very Good	Good	Fair	Poor	Very Poor	Don't know	Total 'Good'	Total 'Poor'
EU28		9	40	26	5	2	18	49	7
BE		8	39	35	8	1	9	47	9
BG		7	38	29	7	2	17	45	9
CZ		13	44	26	3	1	13	57	4
DK		11	30	34	11	2	12	41	13
DE		6	37	18	4	3	32	43	7
EE		16	40	26	6	1	11	56	7
IE		23	46	15	2	1	13	69	3
EL		16	53	23	3	0	5	69	3
ES		9	53	24	2	1	11	62	3
FR		9	39	32	4	1	15	48	5
HR		9	33	38	9	3	8	42	12
IT		5	43	30	9	3	10	48	12
CY		14	43	26	6	1	10	57	7
LV		7	46	34	2	1	10	53	3
LT		6	49	32	4	1	8	55	5
LU		24	34	19	4	1	18	58	5
HU		5	36	40	8	2	9	41	10
MT		6	42	16	1	1	34	48	2
NL		6	37	24	6	1	26	43	7
AT		14	38	19	6	1	22	52	7
PL		7	42	32	3	1	15	49	4
PT		6	43	20	2	0	29	49	2
RO		7	25	33	12	5	18	32	17
SI		5	37	33	13	4	8	42	17
SK		6	35	36	4	2	17	41	6
FI		12	41	35	5	1	6	53	6
SE		9	29	40	10	2	10	38	12
UK		15	33	19	4	1	28	48	5

QE3 Which were the main purposes of the coach trips you have made recently? (MAX. 3 ANSWERS) **(%)**

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Visit family/ friends	To go on holiday	Other leisure	Weekend break	Travel to or from airport	Travel to work	Travel to or from rail station	Travel to place of education	Business trip	Other	Don't know
EU28	34	27	24	17	10	7	7	7	6	9	2
BE	18	37	40	23	11	8	9	4	4	3	0
BG	54	22	18	20	2	10	4	2	7	12	2
CZ	37	28	22	26	7	8	6	9	9	9	1
DK	44	23	19	12	8	13	11	8	2	9	3
DE	40	36	16	24	8	2	3	2	5	6	2
EE	38	13	19	14	4	11	2	10	12	20	2
IE	27	24	33	15	28	6	7	11	6	6	0
EL	53	28	34	14	3	4	2	3	8	13	0
ES	34	38	25	15	8	7	3	5	2	10	0
FR	19	33	28	18	11	5	7	8	3	6	1
HR	39	18	32	19	3	7	3	6	7	12	2
IT	30	27	29	25	15	5	15	11	8	7	0
CY	21	38	34	14	24	8	5	6	6	16	1
LV	41	9	20	14	8	12	2	6	7	15	1
LT	39	16	29	15	7	15	4	9	3	23	2
LU	21	20	35	8	15	19	18	8	4	24	1
HU	42	11	26	15	2	16	5	8	4	21	1
MT	4	49	37	5	21	1	10	11	4	9	6
NL	28	12	23	10	9	20	33	10	2	14	2
AT	26	50	23	27	23	6	14	9	6	4	1
PL	46	30	13	16	5	8	6	5	8	7	4
PT	42	19	32	16	4	8	2	6	6	13	0
RO	39	18	12	12	4	13	7	8	8	16	2
SI	16	31	24	18	8	12	7	16	7	14	1
SK	48	31	22	19	4	9	5	11	5	8	2
FI	26	20	36	9	12	9	8	9	14	11	3
SE	40	14	23	11	22	15	17	5	5	7	2
UK	23	24	26	15	13	4	3	8	4	5	3

QE4.1 Thinking about your most recent trips by coach how would you rate it on the following aspects?
Frequency of services (%)

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Very good	Good	Fair	Poor	Very poor	Don't know	Total 'Good'	Total 'Poor'
EU28	14	46	26	7	1	6	60	8
BE	12	42	33	7	2	4	54	9
BG	13	46	31	5	2	3	59	7
CZ	9	46	34	7	0	4	55	7
DK	14	30	27	13	2	14	44	15
DE	11	50	23	6	1	9	61	7
EE	20	39	23	9	3	6	59	12
IE	36	46	10	4	1	3	82	5
EL	21	49	25	4	0	1	70	4
ES	11	65	15	6	0	3	76	6
FR	11	36	28	5	1	19	47	6
HR	9	36	43	8	2	2	45	10
IT	15	45	31	6	1	2	60	7
CY	24	50	18	2	1	5	74	3
LV	9	47	33	5	1	5	56	6
LT	9	52	26	7	2	4	61	9
LU	22	40	25	3	1	9	62	4
HU	10	34	36	17	2	1	44	19
MT	15	53	9	2	0	21	68	2
NL	10	44	30	6	1	9	54	7
AT	19	53	20	3	0	5	72	3
PL	12	47	29	7	1	4	59	8
PT	10	54	24	5	3	4	64	8
RO	11	33	35	13	3	5	44	16
SI	11	34	32	13	2	8	45	15
SK	9	52	28	7	1	3	61	8
FI	11	36	35	8	1	9	47	9
SE	13	35	31	11	2	8	48	13
UK	21	47	19	3	1	9	68	4

QE4.2 Thinking about your most recent trips by coach how would you rate it on the following aspects?
Punctuality and reliability (%)

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Very good	Good	Fair	Poor	Very poor	Don't know	Total 'Good'	Total 'Poor'
EU28	19	50	23	4	1	3	69	5
BE	14	41	29	10	4	2	55	14
BG	14	47	31	5	1	2	61	6
CZ	21	54	21	3	0	1	75	3
DK	29	33	22	7	1	8	62	8
DE	14	54	25	4	0	3	68	4
EE	29	47	18	3	0	3	76	3
IE	39	47	10	2	0	2	86	2
EL	25	58	15	2	0	0	83	2
ES	22	62	12	3	0	1	84	3
FR	25	36	26	5	1	7	61	6
HR	13	40	41	6	0	0	53	6
IT	16	53	24	6	1	0	69	7
CY	28	51	16	1	0	4	79	1
LV	13	57	27	1	0	2	70	1
LT	18	60	18	1	0	3	78	1
LU	26	39	23	7	2	3	65	9
HU	12	41	38	7	1	1	53	8
MT	22	56	8	5	0	9	78	5
NL	13	55	22	4	1	5	68	5
AT	34	52	11	2	0	1	86	2
PL	15	56	25	3	0	1	71	3
PT	16	55	23	4	1	1	71	5
RO	11	34	37	11	2	5	45	13
SI	20	40	31	4	1	4	60	5
SK	14	58	24	2	0	2	72	2
FI	22	56	15	1	0	6	78	1
SE	24	43	23	5	0	5	67	5
UK	25	49	15	4	2	5	74	6

QE4.3 Thinking about your most recent trips by coach how would you rate it on the following aspects?
Availability of integrated ticket (i.e. one ticket for the entire trip) (%)

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Very good	Good	Fair	Poor	Very poor	Don't know	Total 'Good'	Total 'Poor'
EU28	16	44	20	5	1	14	60	6
BE	14	42	28	8	2	6	56	10
BG	12	30	20	6	7	25	42	13
CZ	17	50	26	3	0	4	67	3
DK	22	29	18	5	1	25	51	6
DE	15	53	13	4	1	14	68	5
EE	19	33	13	3	2	30	52	5
IE	33	43	9	4	1	10	76	5
EL	31	51	11	4	1	2	82	5
ES	11	63	11	3	1	11	74	4
FR	17	28	23	4	0	28	45	4
HR	10	34	42	7	1	6	44	8
IT	11	49	23	6	1	10	60	7
CY	29	48	13	1	0	9	77	1
LV	10	40	18	2	1	29	50	3
LT	8	43	19	5	3	22	51	8
LU	27	39	15	2	0	17	66	2
HU	11	35	33	4	2	15	46	6
MT	16	44	10	0	0	30	60	0
NL	16	41	13	9	1	20	57	10
AT	30	46	15	2	0	7	76	2
PL	14	39	28	9	2	8	53	11
PT	13	56	18	2	1	10	69	3
RO	9	31	41	10	3	6	40	13
SI	14	34	27	9	3	13	48	12
SK	12	44	25	7	1	11	56	8
FI	16	33	16	6	1	28	49	7
SE	30	38	11	5	0	16	68	5
UK	23	45	13	3	1	15	68	4

QE4.4 Thinking about your most recent trips by coach how would you rate it on the following aspects?
Fares and ease of purchasing tickets (%)

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Very good	Good	Fair	Poor	Very poor	Don't know	Total 'Good'	Total 'Poor'
EU28	19	46	23	6	1	5	65	7
BE	15	42	28	8	3	4	57	11
BG	9	40	38	8	3	2	49	11
CZ	20	53	22	3	0	2	73	3
DK	27	25	18	14	5	11	52	19
DE	29	55	9	2	0	5	84	2
EE	29	43	20	3	0	5	72	3
IE	34	48	10	2	3	3	82	5
EL	23	48	21	6	1	1	71	7
ES	15	60	15	6	1	3	75	7
FR	23	31	29	4	0	13	54	4
HR	9	33	45	10	2	1	42	12
IT	15	47	27	6	2	3	62	8
CY	28	53	13	1	0	5	81	1
LV	9	48	34	5	0	4	57	5
LT	9	43	28	13	4	3	52	17
LU	28	39	22	3	1	7	67	4
HU	12	37	40	7	1	3	49	8
MT	15	46	11	1	0	27	61	1
NL	13	38	24	11	2	12	51	13
AT	28	49	18	3	0	2	77	3
PL	13	49	29	6	1	2	62	7
PT	10	58	24	4	1	3	68	5
RO	9	33	38	13	3	4	42	16
SI	15	35	35	9	1	5	50	10
SK	17	55	24	2	0	2	72	2
FI	20	42	21	7	1	9	62	8
SE	17	39	25	10	4	5	56	14
UK	29	47	14	3	1	6	76	4

QE4.5 Thinking about your most recent trips by coach how would you rate it on the following aspects?
Feeling safe whilst at terminal/stop and on coach (%)

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Very good	Good	Fair	Poor	Very poor	Don't know	Total 'Good'	Total 'Poor'
EU28	19	51	22	4	1	3	70	5
BE	17	44	28	5	2	4	61	7
BG	13	48	32	4	1	2	61	5
CZ	11	46	30	8	3	2	57	11
DK	32	37	18	4	1	8	69	5
DE	15	63	18	2	0	2	78	2
EE	25	47	20	4	0	4	72	4
IE	42	49	6	1	0	2	91	1
EL	23	63	12	2	0	0	86	2
ES	17	64	14	3	1	1	81	4
FR	19	43	28	1	2	7	62	3
HR	12	40	42	5	1	0	52	6
IT	19	48	23	7	2	1	67	9
CY	23	53	17	2	0	5	76	2
LV	9	56	31	2	0	2	65	2
LT	11	52	25	8	2	2	63	10
LU	19	47	24	5	0	5	66	5
HU	11	37	41	8	2	1	48	10
MT	26	58	8	1	0	7	84	1
NL	17	57	19	3	0	4	74	3
AT	29	51	16	3	0	1	80	3
PL	13	50	31	4	1	1	63	5
PT	14	58	23	3	0	2	72	3
RO	12	31	37	14	2	4	43	16
SI	16	41	32	6	1	4	57	7
SK	13	53	28	4	0	2	66	4
FI	20	54	18	1	1	6	74	2
SE	28	39	21	7	0	5	67	7
UK	32	52	12	1	0	3	84	1

QE4.6 Thinking about your most recent trips by coach how would you rate it on the following aspects?
Ease of connection with other modes of public transport (%)

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Very good	Good	Fair	Poor	Very poor	Don't know	Total 'Good'	Total 'Poor'
EU28	13	46	25	6	1	9	59	7
BE	9	39	32	11	3	6	48	14
BG	12	40	26	7	4	11	52	11
CZ	11	47	30	7	0	5	58	7
DK	18	32	26	3	1	20	50	4
DE	15	53	17	7	1	7	68	8
EE	15	38	20	7	1	19	53	8
IE	34	48	10	2	1	5	82	3
EL	16	49	25	5	1	4	65	6
ES	10	60	16	6	1	7	70	7
FR	11	37	27	4	0	21	48	4
HR	6	35	44	10	1	4	41	11
IT	10	44	29	7	2	8	54	9
CY	24	53	16	1	0	6	77	1
LV	5	46	34	4	0	11	51	4
LT	8	53	23	3	3	10	61	6
LU	20	43	20	6	1	10	63	7
HU	9	35	37	10	2	7	44	12
MT	19	49	10	0	0	22	68	0
NL	8	38	32	9	2	11	46	11
AT	23	47	22	4	0	4	70	4
PL	12	46	31	6	0	5	58	6
PT	9	51	29	6	0	5	60	6
RO	9	28	38	15	2	8	37	17
SI	10	32	34	13	3	8	42	16
SK	7	47	31	7	2	6	54	9
FI	9	41	26	4	0	20	50	4
SE	17	41	23	7	1	11	58	8
UK	19	50	16	2	2	11	69	4

QE4.7 Thinking about your most recent trips by coach how would you rate it on the following aspects?
Comfort of travel (%)

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Very good	Good	Fair	Poor	Very poor	Don't know	Total 'Good'	Total 'Poor'
EU28	17	48	27	5	1	2	65	6
BE	14	42	34	7	1	2	56	8
BG	12	43	33	7	3	2	55	10
CZ	13	55	28	2	1	1	68	3
DK	20	35	35	4	0	6	55	4
DE	12	56	25	4	1	2	68	5
EE	26	47	20	3	0	4	73	3
IE	41	48	9	0	0	2	89	0
EL	23	50	21	4	2	0	73	6
ES	18	60	15	6	1	0	78	7
FR	19	39	32	6	0	4	58	6
HR	11	38	44	6	1	0	49	7
IT	16	51	28	4	1	0	67	5
CY	28	53	14	2	0	3	81	2
LV	8	51	36	2	1	2	59	3
LT	9	59	26	4	1	1	68	5
LU	21	54	21	2	0	2	75	2
HU	12	40	36	10	1	1	52	11
MT	29	54	9	1	0	7	83	1
NL	10	53	30	3	0	4	63	3
AT	28	47	20	5	0	0	75	5
PL	13	50	30	5	1	1	63	6
PT	18	54	23	3	1	1	72	4
RO	12	29	40	13	3	3	41	16
SI	15	39	34	8	1	3	54	9
SK	15	48	32	3	0	2	63	3
FI	12	57	25	2	0	4	69	2
SE	13	46	31	5	1	4	59	6
UK	26	47	20	5	0	2	73	5

QE5a Why did you decide to travel by coach on these most recent trips? (MAX. 3 ANSWERS) **(%)**

(IF 'USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 1 TO 4 IN QE1.1 OR QE1.2)

	Low prices	You do not have a car	Reliable services	Comfort and cleanliness	No other options available for same destination	Door-to-door convenience	Good connection with other transport (e.g. rail services)	Frequent services	Extensive network of routes and stations	Availability of integrated ticket (i.e. one ticket for the entire trip)	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28	33	27	18	17	16	14	13	11	8	5	6	3	2
BE	40	26	17	16	15	13	11	6	9	6	8	2	0
BG	12	33	19	9	25	7	4	13	17	5	5	5	3
CZ	19	28	18	14	14	44	11	11	6	10	3	3	0
DK	29	30	7	7	19	35	12	4	3	6	13	1	2
DE	69	28	19	10	11	10	11	9	4	4	2	5	1
EE	18	30	16	22	28	12	8	13	4	4	9	3	1
IE	25	20	31	31	12	19	16	20	10	7	1	2	1
EL	43	34	21	13	18	5	8	13	8	11	9	0	0
ES	32	28	19	25	10	11	16	12	9	4	10	2	1
FR	49	26	14	12	10	7	7	5	10	2	6	4	2
HR	27	28	24	12	19	5	6	13	10	4	4	4	1
IT	27	19	35	29	7	10	24	16	14	8	5	2	0
CY	46	47	20	12	17	3	5	20	8	7	8	2	0
LV	11	32	11	13	41	8	6	10	6	1	4	4	1
LT	15	43	23	16	24	8	9	10	8	3	10	2	1
LU	25	20	17	23	11	11	15	12	12	4	13	4	3
HU	14	44	18	18	28	9	8	11	10	1	2	3	0
MT	10	21	23	30	30	25	15	8	4	5	6	1	4
NL	10	33	9	3	35	21	18	6	6	6	9	3	2
AT	35	24	23	29	16	19	16	12	15	12	10	2	1
PL	29	24	9	16	16	30	7	13	6	4	5	2	6
PT	34	29	30	31	9	11	8	10	8	6	5	6	1
RO	21	32	10	13	27	5	8	8	7	6	6	3	3
SI	21	26	20	8	21	11	10	9	7	5	13	4	1
SK	15	35	27	22	18	7	9	12	12	4	3	2	3
FI	35	26	13	9	23	4	16	13	11	4	9	2	3
SE	30	25	13	9	30	10	25	8	4	8	10	3	1
UK	37	22	15	14	11	17	12	9	4	4	2	6	2

QE5b What would make you more likely to travel by coach? (MAX. 3 ANSWERS)
(%)

(IF 'DO NOT USE COACH SERVICES AT LEAST ONCE A YEAR OR LESS', CODE 5 OU 6 IN QE1.1 AND QE1.2)

	If you did not have a car	Lower prices	More extensive network of routes and stations	Better connection with other transport (e.g. rail services)	More frequent services	Improved comfort and cleanliness	More reliable services	Improved door-to-door convenience	Availability of integrated ticket (i.e. one ticket for the entire trip)	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28	37	26	11	10	9	9	9	9	4	4	20	9
BE	37	29	13	12	11	13	12	14	9	9	11	2
BG	50	19	7	4	5	12	9	6	3	2	18	13
CZ	44	22	6	5	8	11	6	10	6	5	15	7
DK	58	27	10	11	14	4	6	20	8	6	9	2
DE	42	26	11	11	7	4	12	6	3	1	29	8
EE	51	15	8	3	4	4	4	7	1	6	19	12
IE	47	21	8	10	13	6	12	10	5	5	10	9
EL	52	37	9	5	18	15	10	4	1	3	16	2
ES	35	25	8	8	10	10	4	5	2	6	25	8
FR	29	38	16	11	8	12	6	13	6	5	14	7
HR	50	29	8	3	11	9	4	4	2	6	10	8
IT	39	23	16	12	14	9	16	8	5	5	11	9
CY	64	31	15	5	15	9	9	7	4	7	9	3
LV	32	22	5	5	10	14	3	3	3	6	21	10
LT	61	27	6	5	8	3	7	10	3	4	12	7
LU	29	12	10	15	11	9	8	9	5	12	26	6
HU	51	20	4	6	12	12	10	10	2	3	18	4
MT	12	8	2	4	4	7	7	4	3	6	33	33
NL	57	22	18	22	14	6	6	19	7	3	10	4
AT	48	28	10	7	13	7	11	12	6	6	18	7
PL	31	24	7	4	9	8	5	9	5	6	18	12
PT	39	15	9	4	4	4	3	3	2	16	20	10
RO	25	20	10	7	6	14	5	4	3	6	22	15
SI	54	16	14	9	10	5	8	5	5	8	18	2
SK	49	19	7	5	10	13	9	5	2	6	10	11
FI	52	13	13	11	11	4	2	5	10	4	14	8
SE	46	19	15	11	10	15	2	14	13	9	16	4
UK	30	18	5	7	6	10	8	8	2	1	29	13