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# **Borders Railway Year 2 Evaluation**

Survey of users and non-users  
Headline findings report

February 2018

## Overview

Peter Brett Associates LLP (PBA) was commissioned by Transport Scotland (TS) to develop a Year 2 Evaluation of the re-opening of the Borders Railway. The primary aim of this research is to build upon the results of the Stage 1 Evaluation (completed in 2016) and further develop understanding of the extent to which the Borders Railway is on track to meet its Investment Objectives.

In addition, the study aims to capture the views and experiences of tourists using the railway. While the views of tourists were captured in the Year 1 Study, it was recognised that, due to the time at which the surveys were undertaken (November 2016), the results are likely to underestimate the true tourism impact. A key aim of this study is therefore to record visitor numbers during the summer peak and, in so doing, provide greater clarity on the overall tourism impact of the railway. As with the Stage 1 study, the research involved an extensive primary data collection exercise comprising:

- an on-train survey of users of the Borders Railway;
- a telephone survey of non- and infrequent users of the Borders Railway based within the Scottish Borders and Midlothian; and
- secondary data analysis including a review of ticket sales and passenger count data and an analysis of public transport accessibility.

In addition, a consultation exercise was carried out with a number of key stakeholders drawn from the bus industry in order to further develop understanding of the impact of the railway on tourism and bus services. The purpose of this report is to summarise the headline findings of the research. The document should be read in conjunction with the Borders Railway Year 2 Evaluation Final Report which sets out the detailed findings from the study and includes a comprehensive discussion of the research approach.

## 1 User Survey

### Response Rate

A total of 825 respondents returned the User Survey<sup>1</sup> equating to an estimated 100,000 annual single trips were which represents approximately 8% of the passenger journeys recorded in the first full year of the railway being open.

In total, 60% (n=496) of respondents to the survey stated that they were either travelling on a leisure day trip or a short or long holiday. As would be expected, the proportion of leisure users is far higher than found in the Year 1 surveys (39%, n=436) which were undertaken later in the year. Overall, 89% (n=414) of visitors in the Year 2 Survey who provided their home location were residents of Scotland, with 61% (n=283) living in the Scottish Borders, 11% (n=53) living in Edinburgh, and 6%

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<sup>1</sup> Over 95% of respondents completed the survey in full.

(n=30) living in Midlothian. A further 9% (n=40) came from elsewhere in the UK and 0.2% (n=1) came from the USA and 3% (n=12) selected 'other overseas', with responses including South Africa, Belgium, Italy, Switzerland, Australia, New Zealand, Spain, Canada, and Venezuela.

### Proportion of New Trips

Overall, 31% (n=250) of respondents stated that they did not previously make their current trip prior to the re-opening of the railway, demonstrating that the railway has encouraged people to take up new opportunities and make new trips they previously did not make.

#### **Key Point:**

*The data suggests that the railway is enabling people to make new journeys which they did not make prior to the re-opening of the railway.*

### Modal Shift

Some 61% (n=490) of respondents to the Year 2 Survey said that prior to the re-opening of the Border Railway they had regularly made the trip they were making at the time of the survey by another mode. Of these, 487 provided details of the mode they previously used and the majority (64%, n=312) reported that they previously drove all the way to their destination (see Figure 4.18 below), suggesting that the railway has encouraged significant modal shift from car to rail. Additionally, a large proportion (25%, n=122) stated that they previously travelled by bus indicating that there has also been modal shift from bus to rail.

Residents of Midlothian, the Scottish Borders and Edinburgh were asked a series of questions concerning home, workplace and car ownership. The key initial results are set out below.

### Local Residents: Impact on Residential Choice

In total, 17% (n=114) of local residents said that they had moved house since the re-opening of the Borders Railway. Residents who stated they had moved house were also asked to what extent the re-opening of the Borders Railway had been a factor in respondent's decision to move. Of those who responded to the question (n=109), 58% (n=63) stated that the line had been a factor in their decision to move (i.e. 'main factor', 'it was one of a number of important factors' or 'it was a fairly minor factor').

Respondents who had moved home (n=114) were also asked whether they would have moved to their current location had the Borders Railway not been re-opened. Some 29% (n=33) stated that they would not have moved to their current address if the railway had not re-opened.

#### **Key Point:**

*The results suggest that the Borders Railway has affected people's residential choices. Of those identified in the sample who had moved address since the re-*

opening of the line, over half reported that the railway was a factor in determining their current address.

### Local Residents: Impact on Employment Choice

In total, 15% (n=99) of respondents to the User Survey from Edinburgh, Midlothian or the Scottish Borders had changed workplace since the re-opening of the railway. Of these, 52% (n=52) stated that the re-opening of the Borders Railway **was a factor** in their decision to move workplace while 46% (n=46) said that the line had **not been a factor**<sup>2</sup>.

Respondents were also asked whether the number of hours they work had changed as a result of the re-opening of the line. The majority of respondents (55%, n=350) reported that the railway had made no impact on the number of hours they work, with 9% (n=59) stating that they now work more hours and 3% (n=18) stating that they now worked fewer hours.

#### **Key Point:**

*There is evidence that the Borders Railway has had an impact on peoples' choice of workplace. Amongst those who had moved employment, a relatively large proportion stated that the re-opening of the line had been the main factor in their decision. Overall, the data suggests that there has also been a modest impact on working hours.*

### Local Residents: Impact on Car Ownership

Overall, the majority of residents of Scottish Borders, Midlothian and Edinburgh (89%, n=585) reported that the re-opening of the line had had no impact on the number of vehicles owned or run by their household. However, 6% (n=40) said that they had reduced the number of vehicles in their household as a result of taking the train journeys they previously made by car. Although, 1% (n=5) found that they had increased the number of vehicles in their household to allow them to drive to the stations and 1% (n=4) had increased the number of vehicles as a result of the removal / changes in bus routes.

#### **Key Point:**

*While not an objective of the study and perhaps a longer term impact, the result suggests that the re-opening of the line has also resulted in some changes to car ownership levels. This car ownership impact is greater than found in Year 1 which suggests that people have taken time to adapt their behaviour.*

### Visitors: Direction of Travel

As outlined above, 60% (n=496) of all respondents to the Year 2 Survey were visitors. Of these, 59% (n=293) were travelling to Edinburgh and 41% (n=203) were travelling to the Scottish Borders or Midlothian.

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<sup>2</sup> one respondent did not answer the question regarding whether the railway was a factor

### Visitors: Extent to which railway influenced decision to make trip

Respondents to the User survey who indicated they were making a tourist day trip or overnight trip were also asked about the extent to which the re-opening of the Borders Railway had influenced their decision to make the trip. Amongst those who responded to this question (n=471), 71% (n=333) said that the Borders Railway had been a factor in their decision to make their current trip, with 32% (n=150) stating it was the main factor, 29% (n=136) stating it was one of a number of factors, and 10% (n=47) stating it was a fairly minor factor.

Respondents were also asked whether they would have made their current trip if the Borders Railway had not re-opened. Of those who responded to this question (n=468), 25% (n=119) said they would not have made the trip.

#### **Key Point:**

*There is evidence that the Borders Railway has had a material impact on leisure and tourism travel in the corridor, both to and from Midlothian and the Scottish Borders with the railway being identified as a key driver for this activity.*

## **2 Non User Survey**

### Response Rate

A total of 250 respondents took part in the Non-User and Infrequent User Survey. Of these, 64% (n=161) were resident in Midlothian and 36% (n=89) were resident in the Scottish Borders. Of the 250 respondents to the survey, 39% (n=97) had never used the Borders Railway, 18% (n=44) had used the service on one occasion and 44% (n=109) had used the service up to five times since it opened.

### Reasons for not Using the Service More Frequently

The figure below shows the reasons respondents provided for not using the railway more frequently. Overall, the most common response was the '*car is more convenient*' with 72% (n=181) of respondents citing this as a reason for their limited use. Other common responses included, '*the bus is cheaper*' (46%, n=115), '*the bus is more convenient*' (43%, n=108), '*the cost of train fares*' (38%, n=95) and '*bus connections to the station being inconvenient*' (31%, n=77).

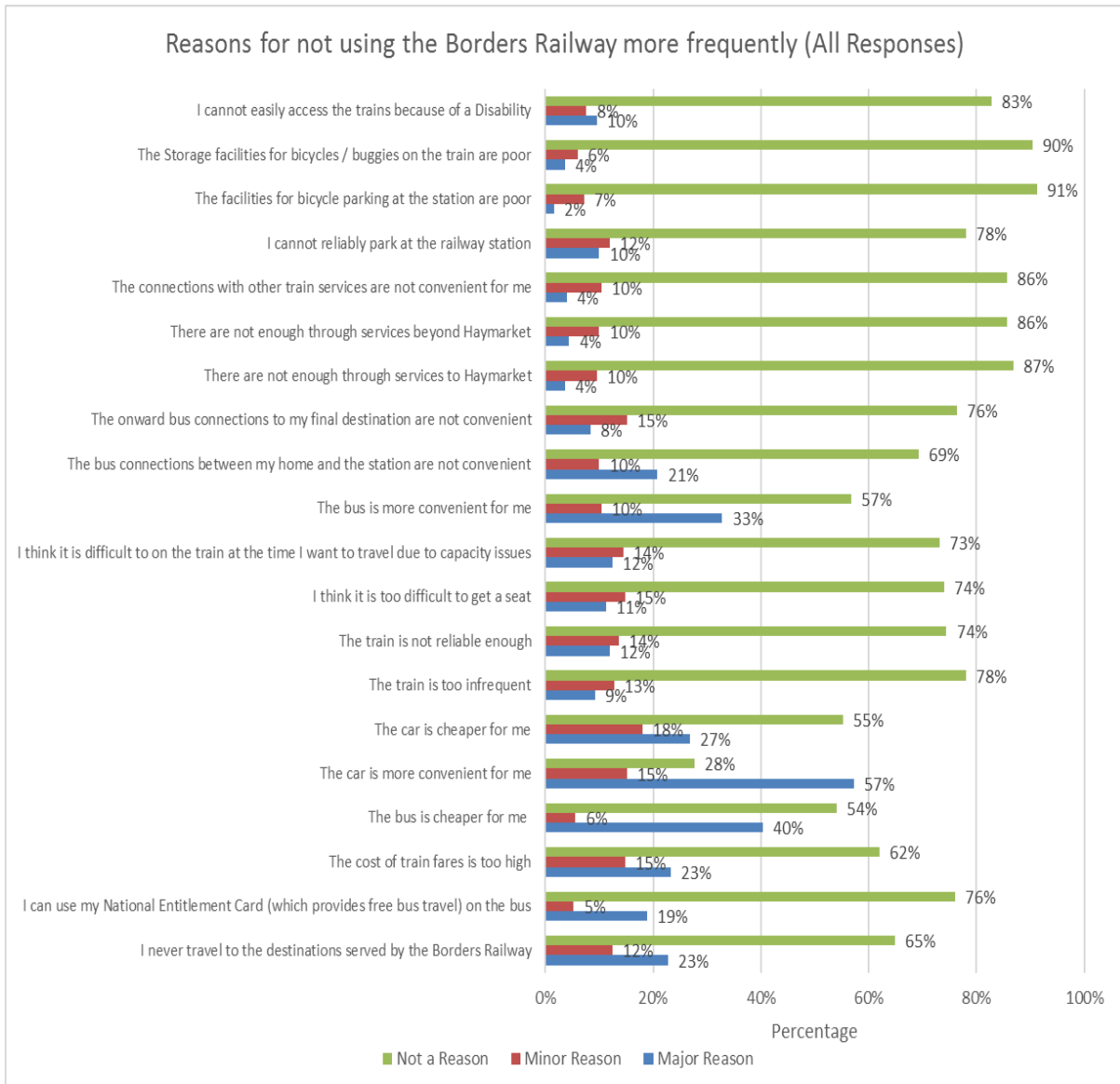


Figure 1.1: Reasons for not using the Borders Railway more frequently by geography

**Key Point:**

*Overall, the most common reason given by respondents for not using the Borders Railway service more frequently was the ‘car is more convenient’. Other common responses included, ‘the lower cost of bus services’, ‘the greater convenience provided by bus options’ and ‘the cost of train fares’.*



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