TRANSPORT
SCOTLAND
CÒMHDHAIL ALBA

Borders Railway Year 1 Evaluation
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CONTENTS

Transport Research Summary

The Borders Railway re-opened on Sunday 6th September 2015. In line with Scottish Transport Appraisal Guidance (STAG) and the Guidance on the Evaluation of Rail Projects, this research provides the Stage 1 Evaluation of the re-opening of the line. To inform the development of the Stage 1 Evaluation a primary data collection exercise was completed comprising an on-train survey of users of the Borders Railway and a telephone survey of non and one-off users based within the Scottish Borders/Midlothian. In addition, a number of secondary data analysis tasks were undertaken including a review of ticket sales and passenger count data and an analysis of public transport access. In total, 1,112 responses were received to the User Survey and 227 responses were received to the Non-user Survey.

Main Findings

- Passenger numbers are higher than forecast at all the Scottish Borders stations and lower than forecast at all the Midlothian stations.

- The majority of patronage on the line is outward (i.e. towards Edinburgh) with Tweedbank accounting for the biggest component of demand and Edinburgh Waverley the most frequent destination.

- Commuting is the most common journey purpose. There were also a considerable number of trips to education and large volumes of leisure users. Overall, 39% of respondents to the user survey indicated the purpose of their trip was either a tourist day trip or overnight stay. Of these, 34% were travelling to the Scottish Borders / Midlothian.

- Driving and parking at the station was the most common method of transport for users travelling from Tweedbank Station, with walking to the station more common at Galashiels, Stow, Gorebridge, and Newtongrange. The catchment area for Tweedbank Station covers a larger area than that of the other stations. This may be a result of the station being the end of the line and the availability of free parking at the site and may explain the higher than predicted passenger numbers at this location.

- Based on the frequency with which respondents indicated they made their current trip, it is calculated that approximately 50,000 (36%) of the estimated annual single trips recorded via the sample were 'new trips'.

- The re-opening of the Borders Railway has resulted in significant modal shift from the car to public transport, with 57% of users who previously made their trip by another mode stating that they drove all the way to their destination equating to an estimated 40,000 saved car journeys.

- There has also been a shift from bus to rail with 29% of those users who made their trip by another mode stating that they previously made their current journey by bus (equivalent to 22,000 bus journeys).

- While the re-opening of the railway has resulted in improvements in access between the stations, there have been changes in the bus network which may have resulted in declines in accessibility elsewhere.

- There is evidence that the Borders Railway has affected peoples' residential choices and choice of workplace, with over 50% of users who had moved house and over 80% of those who moved employment since the line re-opened stating that the railway was a factor in their decision.

- Similarly, more than 65% of tourist users stated that the re-opening of the railway was a factor in their decision to make their trip and 23% stated that they wouldn't have made their trip were it not for the rail line.

- There was generally a high level of satisfaction with the quality of service. Overall, users were least satisfied with facilities / services and the availability of staff at the station(s).

- The greater convenience offered by the car was the most popular reason amongst non and one-off users for not using the service / using the service more. The lower cost of bus services, the greater convenience provided by bus options and the ability to use the National Entitlement Card on buses were also popular responses with these more popular amongst residents from Midlothian.

- 37% of non and one off users stated that improvements to the Borders Railway would encourage them to use the service, with the most popular improvement being lower train fares.

Executive Summary

Aims of the Research

The aim of this research was to develop a Stage 1 Evaluation of the re-opening of the Borders Railway. A Stage 1 Evaluation is generally completed one year after a scheme has opened and aims to provide a high level assessment of the extent to which the investment is on track to meet its Investment Objectives. The Investment Objectives for the Borders Railway, as outlined in the Final Business Case (FBC) for the scheme[1], are included in Table S1 below.

Table S1: Borders Railway Investment Objectives

Objective	Description
Investment Objective 1	Promote accessibility to and from the Scottish Borders and Midlothian to Edinburgh and the central belt
Investment Objective 2	Foster social inclusion by improving services for those without access to a car
Investment Objective 3	Prevent decline in the Borders population by securing ready access to Edinburgh's labour market
Investment Objective 4	Create modal shift from the car to public transport

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[1] http://www.transport.gov.scot/system/files/documents/reports/TS_Borders_FBC_final_version_issued.pdf

In addition to exploring the above, the research also sought to examine the impact of the line on visitor numbers and explore views of the service and barriers to use amongst one-off and non-users.

Methodological Approach

To inform the development of the Stage 1 Evaluation a primary data collection exercise was completed comprising:

- an on-train survey of users of the Borders Railway.
- a telephone survey of non and one-off users of the Borders Railway based within the Scottish Borders and Midlothian.

In addition, a number of secondary data analysis tasks were completed including a review of ticket sales and passenger count data and an analysis of public transport accessibility.

In total, 1,112 responses were received to the User Survey and 227 responses were received to the Non-user Survey. Summing the number of journeys made by respondents to the User Survey over a year equates to over 140,000 single trips - over 10% of the passenger journeys recorded in the first full year of opening.

Investment Objectives

A summary of the key findings with respect to the Investment Objectives is provided below:

- The majority of patronage on the line is outward with passenger numbers from the Scottish Borders stations much higher than Midlothian stations, and Tweedbank accounting for the biggest component of demand.
- Edinburgh Waverley is the most frequent destination for those buying tickets at Borders Rail Stations. However, there are also trips to / from elsewhere in the Central Belt including Glasgow and Kirkcaldy.
- Commuting is the most common journey purpose. There are also a considerable number of trips to education and large volumes of leisure users.
- A large proportion of respondents to the user survey were relatively infrequent users, with the majority (24%) indicating that they make the journey less than once a month.
- Driving and parking at the station was the most common method of transport used by users of the service travelling from Tweedbank Station, with walking to the station more common at Galashiels, Stow, Gorebridge, and Newtongrange.
- Based on the frequency with which respondents indicated they made their current trip, it is calculated that approximately 50,000 (36%) of the estimated annual single trips recorded via the sample were 'new trips' suggesting that the re-opening of the line has encouraged people to make additional / new trips which they previously did not.
- The line has provided those without a car a means to quickly access destinations along the route. Overall, 15% of users do not own or have access

to a vehicle. While the re-opening of the railway has resulted in improvements in access between the stations, there have been changes in the bus network which may have resulted in declines in accessibility elsewhere.

- The re-opening of the Borders Railway has resulted in significant modal shift from the car to public transport, with the majority of respondents (57%) who previously made their trip by another mode stating that they drove all the way to their destination equating to an estimated 40,000 saved car journeys when frequency of trip is accounted for.

- While there has been a shift from car to rail, it is also evident that there has been a shift from bus to rail with 29% of the User Survey sample stating that they previously made their current journey by bus (equivalent to 22,000 bus journeys). While some of these saved car trips will be offset by car miles associated with new rail trips for which the car is used to access the station, the latter are likely to be shorter trips and therefore the net impact in terms of reduced car miles is likely to be positive with resultant benefits in terms of carbon reduction, congestion and air quality.

- The results of the User Survey suggest that there is evidence that the Borders Railway has affected peoples' residential choices. Of those identified in the sample who had moved house since the line opened, over half reported that the railway was a factor in determining their current address.

- There is evidence that the Borders Railway has had an impact on peoples' choice of workplace. Amongst those responding to the User Survey who had moved employment, over 80% 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.

Visitor Trips

A summary of the key findings with respect to visitor trips is provided below:
- 39% of respondents to the user survey indicated the purpose of their trip was either a day or overnight trip. While the majority of these were Edinburgh based, a considerable proportion of the overall sample (11%) were trips to the Scottish Borders, with a further 2% being Midlothian bound.

- The re-opening of the Borders Railway was a relatively important factor in people's decision to make tourism trips with more than 65% of tourist users stating that it was a factor in their decision to make their trip and 23% stating that they wouldn't have made their trip were it not for the rail line.

- Staying with friends and / or family was the common accommodation type amongst those from the Borders and Midlothian, with most respondents indicating they did not pay for accommodation. Visitors undertook a range of activities during their trip with shopping the most commonly cited activity amongst those travelling to the Scottish Borders / Midlothian and Edinburgh.

Service Quality and Barriers to Use

A summary of the key findings with respect to passenger views and barriers to use is provided below:

- There was generally a high level of satisfaction with the quality of service, with 80% of respondents to the User Survey rating the service as very good or good.

- Users of the service were least satisfied with facilities / services at the station(s) and the availability of staff at the station(s). Net satisfaction was also low with regard to the timing and availability of bus connections to/from the stations. In terms of reliability and capacity 62% of users were satisfied with their ability to get a seat while 55% were satisfied with the reliability of the service.

- There was a positive perception of the railway amongst users in terms of performance against the objectives with over 90% agreeing that the railway had promoted access to / from the Scottish Borders/Midlothian to Edinburgh

- The majority (80%) of non-users / one-off users said that they didn't use the service more frequently because the car was more convenient. Other popular responses included, the lower cost of bus services (47%), the greater convenience provided by bus options (39%) and the ability to use the National Entitlement Card on buses (30%). The alternative offered by bus options was more of a draw amongst residents from Midlothian which could be attributed to availability of the Lothian Bus flat fare in this area.

- In total, 20% of non and one off users cited the reliability of the service as a reason for their limited use, 18% and 17% respectively selected 'difficulty getting a seat on the train'[2]. Both the reliability and (perhaps surprisingly) the capacity of the service were bigger concerns amongst those from the Scottish Borders than Midlothian.

- In total, 37% of non and one off users stated that improvements to the Borders Railway would encourage them to use the service, with the most popular improvement being lower train fares. In contrast to the sample as a whole and that of Midlothian respondents, amongst Scottish Borders residents, the most popular improvement was 'an extension of the Borders Railway to Carlisle' followed by 'an extension of the Borders Railway to Hawick'.

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[2] This could be interpreted as physical difficulty (i.e. too difficult to step from the platform to the train) or difficulty getting on the train due to capacity issues.

1   Introduction

Overview

Peter Brett Associates LLP (PBA) was commissioned by Transport Scotland (TS) to develop a Stage 1 Evaluation of the re-opening of the Borders Railway. The aim of a Stage 1 Evaluation is to provide a high level assessment of the extent to which the project is on track to reach its investment objectives. To inform the development of the Stage 1 Evaluation a primary data collection exercise was completed comprising:

- an on-train survey of users of the Borders Railway; and
- a telephone survey of non and one-off users of the Borders Railway based within the Scottish Borders and Midlothian.

In addition, a number of secondary data analysis tasks were undertaken including a review of ticket sales and passenger count data and an analysis of public transport accessibility. The purpose of this report is to set out the overall findings from the study. The document includes a detailed discussion of the research approach as well as a summary of the key findings from both the primary and secondary research.

Report Structure

The report is structured as follows:

- **Chapter 2:** provides a brief overview of the Borders Railway and the context for the study
- **Chapter 3:** discusses the methodological approach to the research and provides a summary of the achieved response for each survey
- **Chapter 4:** summarises the results of the research in the context of the Investment Objectives for the Borders Railway
- **Chapter 5:** provides an overview of the survey responses received from tourists using the Borders Railway
- **Chapter 6:** discusses passenger views on the service and the barriers to use amongst non and one-off users of the railway

2 Background

The Borders Railway

The 'Waverley Route', previously provided direct rail services between Edinburgh, the Borders and Carlisle. The route was closed in 1969 having been identified by the Beeching Report as unsuitable for retention. Some 31 years later, and following a locally based campaign, the three local authorities of Edinburgh, Midlothian and Scottish Borders began developing a business case for the re-opening of the line to Tweedbank. Having secured support from the Scottish Government, Scottish Enterprise and the rail industry, the Waverley Railway (Scotland) Act 2006, which authorised construction of the railway, was given royal assent in June 2006. Responsibility for delivery and funding of the Project transferred to Transport Scotland in 2008 and construction on the line began in April 2014. The new railway re-opened to passenger traffic on Sunday 6 September 2015 with the route becoming the longest new domestic railway to be constructed in Britain for over 100 years. Overall, the project involved:

- 30 miles of new railway;
- seven new rail stations, four in Midlothian (Shawfair, Eskbank, Newtongrange and Gorebridge) and three in the Scottish Borders (Stow, Galashiels and Tweedbank); and
- trains running every half hour with a journey between Tweedbank and Edinburgh of less than one hour.

A map illustrating the new line and the stations (including the existing Stations of Brunstane and Edinburgh) is provided in Figure 2.1.
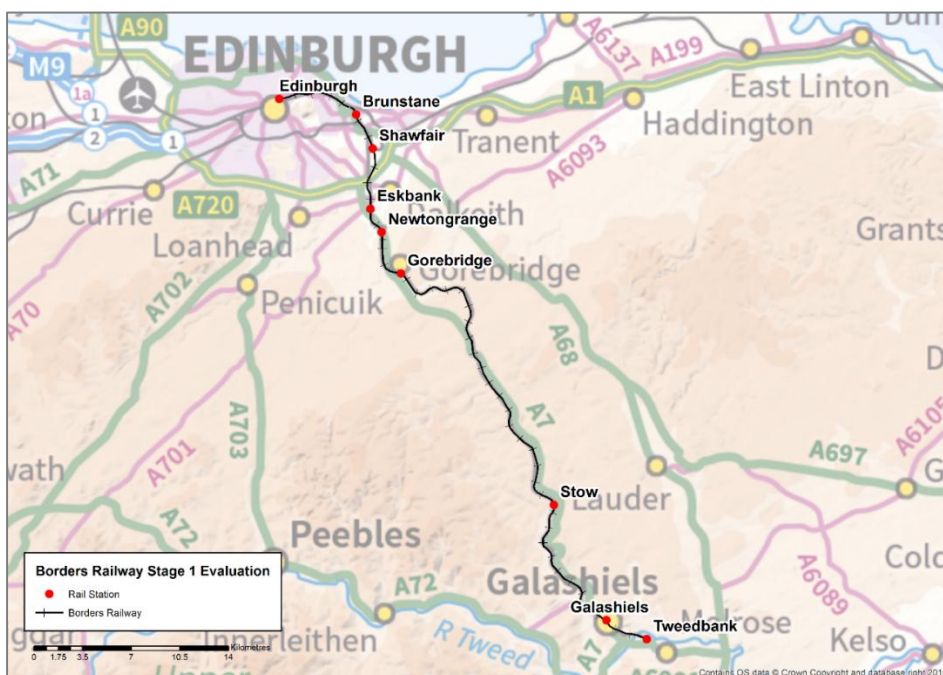

Figure 2.1: Map of the Borders Railway

The Business Case

The Final Business Case (FBC) for the Borders Railway[3], published in November 2012, noted that the re-opening of the line would have a positive contribution towards achieving:

- the Scottish Government's Purpose, by increasing the accessibility of Edinburgh and important regional markets for people of Midlothian and the Scottish Borders
- the transport objectives outlined in the Government Economic Strategy, by improving the opportunities for leisure and tourism in the region
- the National Transport Strategy's objectives, by improving integration, promoting regional cohesion/social inclusion and by helping to promote economic growth

The document provides an assessment of the project against four investment objectives as shown in Table 2.1.

Table 2.1: Borders Railway Investment Objectives

Objective	Description
Investment Objective 1	Promote accessibility to and from the Scottish Borders and Midlothian to Edinburgh (including the airport) and the central belt
Investment Objective 2	Foster social inclusion by improving services for those without access to a car
Investment Objective 3	Prevent decline in the Borders population by securing ready access to Edinburgh's labour market
Investment Objective 4	Create modal shift from the car to public transport

The First Year of Operation

Outturn Passenger Figures

The FBC contained a Central Forecast of '*Annual Return* Trips in the Opening Year'. This forecast a total of 647,136 return trips in the first year of operation which equates to **1,294,272** single trips as shown in Table 2.2.

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[3] http://www.transport.gov.scot/system/files/documents/reports/TS_Borders_FBC_final_version_issued.pdf

Table 2.2: Forecast Return and Single Trips for the first Year of Operation

Station	FBC Central Forecast (Annual Return Trips)	Forecast Annual Single Trips
Tweedbank	21,621	43,242
Galashiels	23,431	46,862
Stow	5,843	11,686
Gorebridge	90,019	180,038
Newtongrange	52,918	105,836
Eskbank	130,525	261,050
Shawfair	61,860	123,720
Brunstane / Newcraighall	986	1,972
Waverley	220,533	441,066
Haymarket	35,329	70,658
Edinburgh Park	4,071	8,142
Other	-	-
Total	**647,136**	**1,294,272**

In order to examine outturn passenger figures, an analysis of industry 'LENNON' data provided by ScotRail was undertaken. These data provide details of ticket sales by type, by the station at which the ticket was sold. The ticket sales data is turned into estimates of single journeys made using industry standard multipliers to convert e.g. Season Ticket sales to journeys made on the railway. The data therefore allocates all the journeys made on single and non-single tickets to the station where the ticket was sold. The data were provided in 4-week ScotRail reporting periods, and to provide a complete year of data, the 13 reporting periods 2016/P07 to 2017/P06 were used, covering the period 20/09/2015 to 17/09/2016. Using this data, the total outturn figure is **1,267,599** – which is within 2% of the outturn shown in the above table[4]. However, when broken down by station, it can be seen that, although the aggregate figures are well matched, there are very large differences between forecast and outturn passenger numbers at the station level, as shown in Figure 2.2 below.

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[4] The outturn figure quoted here differs from the publically available data published by ScotRail. This is because of differences in the reporting period. The ScotRail data which uses daily data covers an exact year (06/09/15 to 05/09/16), while the data reported above is based on 4-week reporting and covers the period 20/09/15 to 17/09/16.
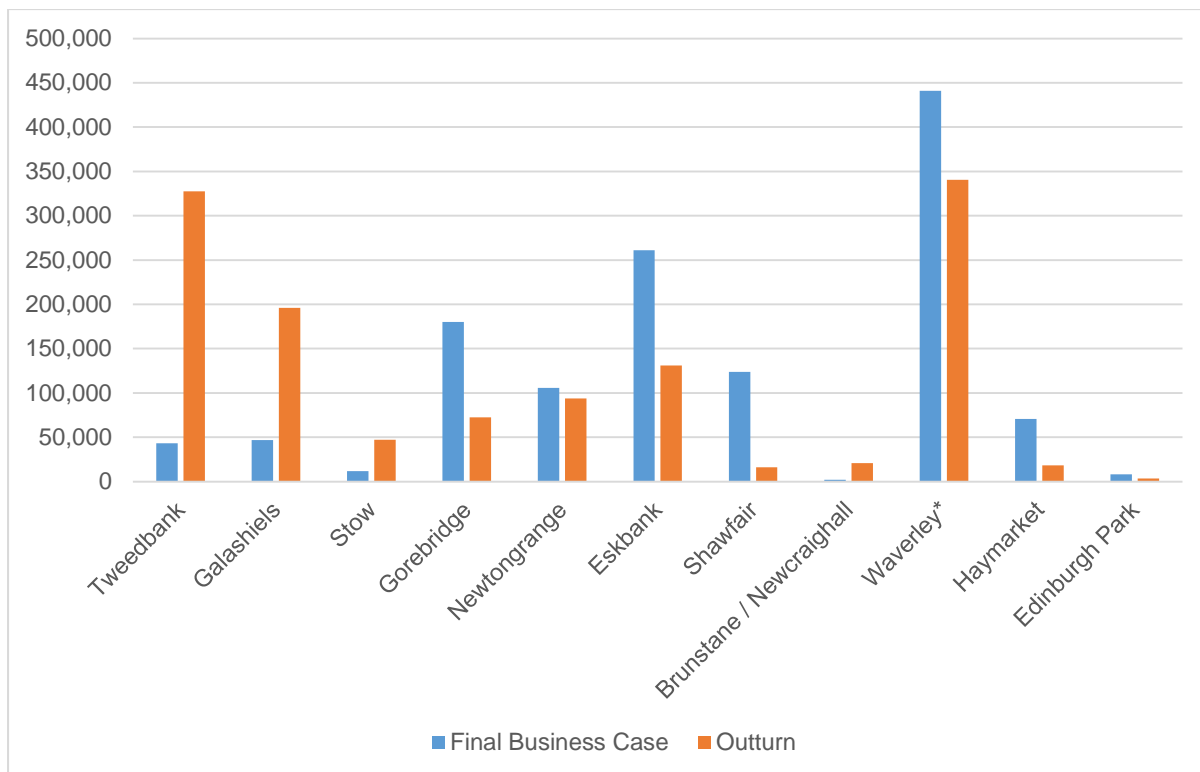
Figure 2.2: Forecast and Outturn Passenger Figures at Station Level

* passengers to / from destinations beyond Edinburgh (except Haymarket and Edinburgh Park) are assumed to be attributed to Waverley in the FBC

Passenger numbers are therefore much higher than forecast at all of the Scottish Borders stations, and much lower than forecast at all of the Midlothian stations. Passenger numbers originating from Tweedbank and Galashiels are seven and four times the forecast respectively. The absence of development of the Shawfair site explains the low patronage there, with figures likely to increase as the area is developed. The FBC forecast of passenger numbers out of Edinburgh is also higher than outturn. Note that in the outturn figures, trips originating beyond the stations reported here, e.g. a return trip from Glasgow to Galashiels have also been attributed to Edinburgh Waverley for comparability with the FBC.

Passenger Numbers over Time

Figure 2.3 shows ticket sales data by 4-week reporting period for the Borders Railway stations only (i.e. 'outbound' travel) and Figure 2.4 shows inbound travel to the Borders Railway stations for tickets bought at stations other than the Borders Railway stations. It is noted that some of the four week periods in which the data is reported sometimes straddle months.
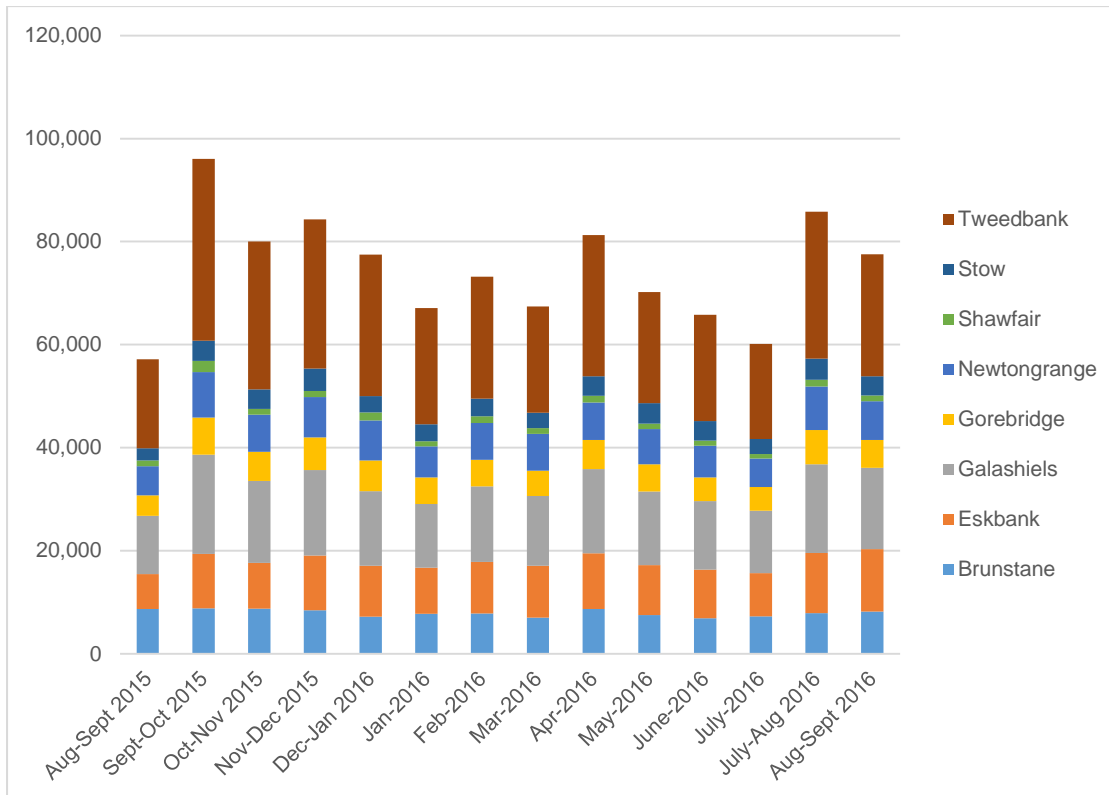
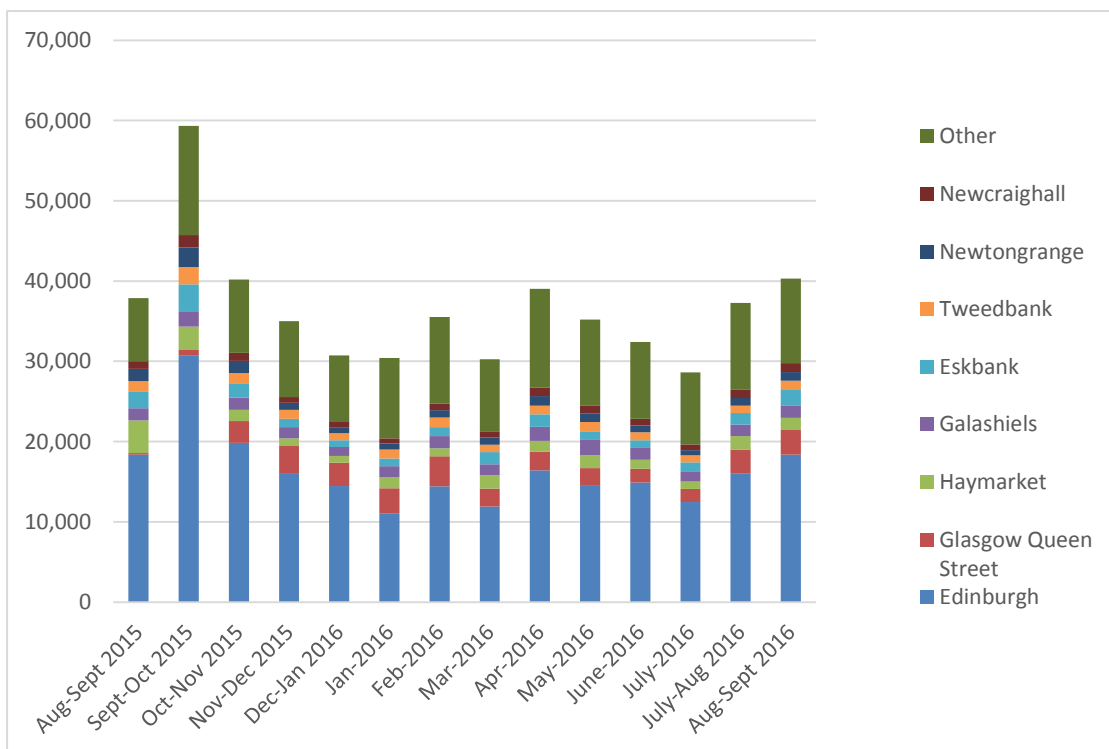Figure 2.3: Ticket Sales by 4-week reporting period for Borders Railway Stations

Figure 2.4: Ticket Sales by 4-week reporting period for inbound trips to the Borders Railway Stations

These data show an irregular pattern of demand which, prior to July-August 2016 indicated a dropping off in demand from the initial full period of September-October 2015. On average, 76,000 passenger journeys per month were made originating from these stations (excluding the first August-September part 4-week period).

Issues and Impacts

During the first year of operation of the service there were a number of media reports of issues with capacity and reliability, with passengers reportedly, on occasion, being unable to board at some intermediate stations and longer than expected station dwell times reportedly resulting in delays and cancellations. The higher than predicted passenger numbers at Tweedbank have also resulted in issues with car park capacity at this station with the result that overflow parking was provided adjacent to the station. In addition, since the re-opening of the line there have been some changes to the bus network within the vicinity of the route, with service frequency reduced on some routes due to declines in patronage. While some of these changes are likely to be a result of other factors, some may be a result of modal shift from bus to rail.

Some of the key issues which have emerged during this first year of operation can therefore be summarised as:

- **overall demand from the Scottish Borders has been underestimated and demand from Midlothian has been overestimated**
- **patronage at Tweedbank is much higher than forecast** – is the station catchment for Tweedbank larger than anticipated?
- **reliability of the service** – has reliability issues (real or perceived) impacted the frequency of use (users) or deterred people using the service (single users / non-users)
- **on train crowding** – has peak period crowding on the service impacted the frequency of use (users) or deterred people using the service (single user / non-users)
- **some bus services have retrenched** – to what extent has train usage been driven by a switch from bus and what is the impact of this in terms of access

As well as the above issues, there have also been indications of wider impacts with the Scottish Tourism Economic Assessment Monitor (STEAM) statistics indicating that there was a significant improvement in key tourism performance figures in the first half of 2016 compared to the first half of 2015. For example, according to this data, the number of day visitors staying in the Borders and Midlothian increased by 11% and 7.2% while the number of visitor days in hotels and bed and breakfasts in Borders and Midlothian increased by 27% and 12.3% respectively[5]. Such increases are borne out in anecdotal data from individual sites, with a number of local tourist attractions, including the National Mining Museum near Newtongrange Station and Abbotsford House in Galashiels reporting increased visitor numbers.

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[5] Borders Railway Boosts Tourism, 2017, Midlothian Council,
https://www.midlothian.gov.uk/news/article/2114/borders_railway_boosts_tourism, accessed March 2017

3 Methodological Approach

Overview

This Chapter provides an overview of the approach to conducting the 'User' and 'Non-User' Surveys. It includes details of the aims of each survey, describes how each survey was administered and provides a summary of the sample achieved.

User Survey

<u>Survey Content</u>

The primary purpose of the User Survey was to gather information on the current travel patterns and behaviours of users and how these have changed since the re-opening of the line. In order to inform the Stage 1 Evaluation, it was important that the questions selected for inclusion (and therefore the data collected) aided the assessment of the scheme against the Investment Objectives (See Table 2.1). The latter therefore formed a key input into the question selection and design process.

In addition, as discussed above, initial evidence suggests that there has been an increase in tourist trips to the Scottish Borders and Midlothian since the re-opening of the line. While not explicitly included within the Investment Objectives for the scheme, this growth in visitors is an important impact and therefore in order to capture this change a series of questions specifically aimed at leisure tourists were also included in the survey. These included questions on:

- accommodation and trip spend;
- the type of accommodation used;
- the type of leisure activities undertaken;
- the extent to which the re-opening of the Borders Railway was a factor in choosing to make the trip; and
- what respondents would have done had they not decided to visit Midlothian / Scottish Borders.

It is recognised however that due to the time period over which the surveys were undertaken (21st November 2016 – 4th December 2016), the number of responses from visitors is likely to be low compared to that which would be achieved in peak season.

Finally, to develop understanding around the factors which influence an individual's choice to use the railway, questions on access to other modes (including car ownership and possession of the National Entitlement Card) as well as views on specific aspects of the service such as capacity, reliability and frequency and the extent to which these issues have influenced use were also sought.

In developing the survey, cognisance was also taken of the questions within the Borders Baseline Household Survey and the National Rail Passenger Survey (NRPS) in order to ensure consistency where possible.

Method

Various options were considered for collecting the user survey data and it was concluded that the most cost-effective option would be an **on train, researcher administered self-completion survey**. The rationale for selecting this approach was as follows:

- Given that the target population for the study is users of the railway, it was reasoned that at station or on-board surveys offer the most efficient solution because they provide ready access to this population and can therefore be conducted more cost effectively than less targeted approaches;
- Given the number of responses required and the relatively short timeframe available for data collection it was reasoned that self-completion surveys rather than the more time intensive researcher led interviews would provide a more efficient solution; and
- Given the low average number of passenger boardings / alightings per day at some stations on the route (e.g. Shawfair) it was reasoned that administering the surveys on-board the train rather than at the station would result in a more efficient use of researcher resources.

Survey Administration

The user surveys were administered by fieldworkers on the train. The researchers distributed the surveys on a carriage-by-carriage basis. Passengers were encouraged to complete the survey there and then and the completed responses were collected back in by the researchers before they moved onto the next carriage. Where completing and returning the survey on-board the train was not possible, a postage paid return envelope was provided so that participants could return the completed questionnaire in their own time. In addition, where an individual required additional assistance in completing the survey, a telephone number and free call back service was offered so that respondents could complete the survey over the telephone.

The user surveys were undertaken over six separate days (Monday, Tuesday, Thursday, Friday, Saturday and Sunday) during the period 21/11/16 – 04/12/16. A Fieldwork Schedule was developed prior to conducting the surveys using passenger counts provided by ScotRail. This covered trains departing Tweedbank northbound between the hours 0559 to 1759 and departing Brunstane southbound between the hours of 1605 to 1901.

Achieved Response

Number of Responses

In total, 1,112 User Survey responses were received. A breakdown of the sample characteristics is provided in Appendix A. Each respondent to the survey provided an indication of how frequently they make the trip they were making at the time of the survey (see Chapter 4, Section 2.4). The responses to this question were then used to calculate an estimated annual return trip figure and an annual single trip figure (by multiplying the former by 2) for each respondent using the conversion factors outlined in Appendix B. Using this approach an estimated 140,000 annual single trips were captured by the sample. This equates to over 10% of the passenger journeys recorded in the first full year of opening. It is noted that, unless otherwise stated, all graphs in the remainder of the report are based upon the number of responses.

Non-user Survey

The second element of the primary research was a survey of non-users of the Borders Railway. The methodological approach adopted for the delivery of this is provided below.

Sample Identification

The characteristics of the non-user population is unknown. As such, it was assumed that non-users are comparable to the wider population and the sample was targeted towards achieving a representative sample of this. To do this, the catchment tiers utilised as part of the 2015 Borders Baseline study were utilised. These are discussed below.

Catchment Tiers

Residents of the Scottish Borders and Midlothian are likely to have been affected in different ways by the line (and therefore display different behavioural responses to it) as a result of their different geographical locations. For example, those living within walking distance of the line may display different behaviours from those living within a driving catchment of a park and ride site. To account for this, for the Borders Baseline Study TRACC accessibility planning software was used to identify a series of potential catchments based on access to the stations. These are shown in Figure 3.1 and defined as follows:

- **Tier 1:** areas where walk-in access to the new stations is possible (<15 minutes), taking account of the walking network, including off street, footpaths and any new active travel based links to the new stations;
- **Tier 2:** excluding Tier 1, areas where reasonable bus-based public transport access is possible (i.e. along bus routes serving the stations) – e.g. by bus within 15 minutes in both an AM and PM peak period; and
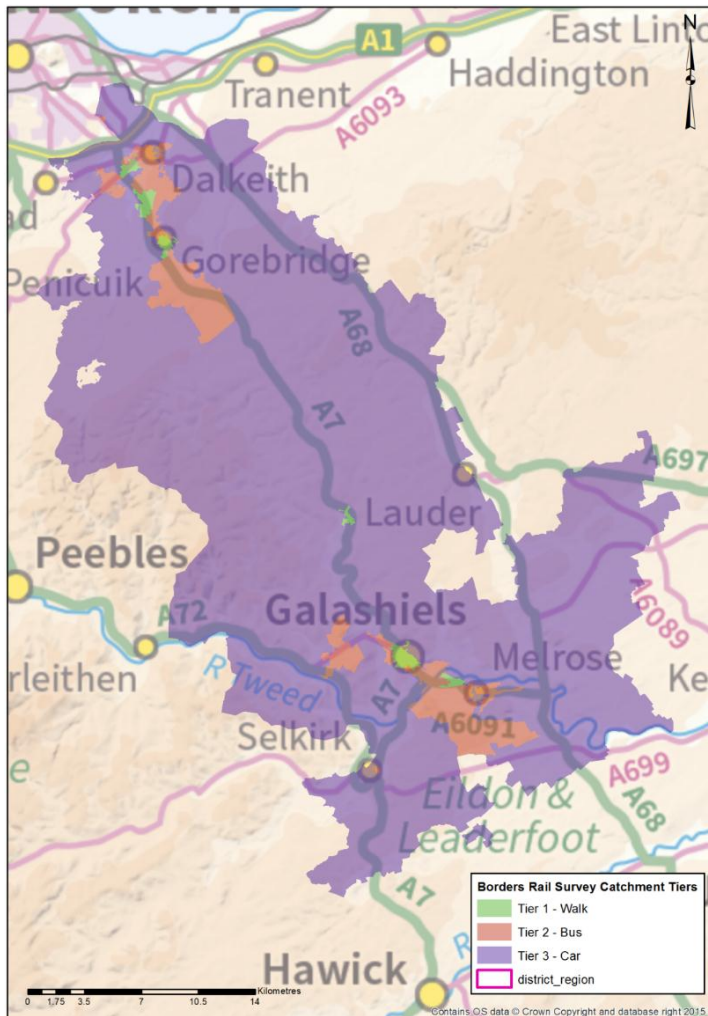
Figure 3.1: Geographical extent of Catchment Tiers

- **Tier 3:** excluding Tiers 1 and 2, areas where only car-based access to stations is realistic (within 20 minutes), and the new stations will become the closest P&R option for accessing Edinburgh. For example, Penicuik residents would not be expected to use the Borders railway to access Edinburgh, despite being approximately 20 minutes' drive from a station.

In order to obtain a representative sample of non-users it was important to ensure a sufficient number of responses would be drawn from each of these tiers. The benefit of this approach was that it provided a systematic representation of the three main groups of potential users (walk in, bus-based potential and car-based) in each local authority area. If the sample had not been targeted in this way, a good representation of non-users may not have been obtained, and the findings could be skewed by an over or under representation of some groups.

Survey Content

The primary purpose of the Non-user survey was to gather information on any perceived barriers to using the service. At the outset of the study it was agreed that the definition of a 'non user' should be broadened to include 'one-off' users. A new line such as the Borders Railway is likely to generate a significant number of one-off users, particularly during the first year of operation and including these within the Non-user survey would provide an opportunity to understand why they have not made greater use of the railway.

The non-user survey included questions on:

- Main purpose of trip on the Borders Railway (one-off users only);

- Origin / Destination Stations (one-off users only);
- Reasons for not using the Borders Railway or not using it more frequently (including, for example, the cost of rail travel relative to bus; difficulty getting a seat or getting on the service; and the reliability of the service);
- What improvements would encourage respondents to use the service more frequently; and
- How often and where respondents would travel using the service if the improvements they selected were made.

Survey Method and Administration

The Non-User Survey was conducted by telephone and specifically targeted residents living within the identified tiers as discussed above. The contact details for respondents were drawn from:

- A database of responses to the 2015 Borders Railway Baseline Household Survey
- a telephone database of residents of the Scottish Borders and Midlothian living within Tiers 1, 2 and 3 as defined above

For the 2015 Borders Railway Baseline Household Survey participants were asked to provide their postcode and state a) whether they anticipated using the Borders Railway in the first 12 months of operation and b) if they would be willing to take part in future research. In total, 251 respondents said they did not intend on using the service and would be willing to take part in future research. Of these, 171 lived within the identified walk, public transport or car catchment areas. This cohort of respondents formed an initial contact list of potential non-users. The Borders Baseline database was then supplemented by a purchased telephone database of residents based within the identified walk, public transport or car catchment areas.

Achieved Response

In total, 227 responses were received to the Non-User Survey. Overall, the number of responses received via the Borders Baseline database was relatively small, accounting for just 13% of the overall sample. In part this was because a relatively large proportion of this sample (19%) had used the Borders Railway despite saying they did not anticipate using the service in 2015.

Table 3.1 provides a breakdown of the responses by geography, with the results shown graphically in Figure 3.2. Some 74% (n=169) of the overall sample live in Midlothian, with 26% (n=58) based within the Scottish Borders.

The larger number of respondents from Midlothian perhaps reflects the fact that the number of users in the Scottish Borders has significantly exceeded forecast figures and therefore non-users are smaller in number and more difficult to locate.
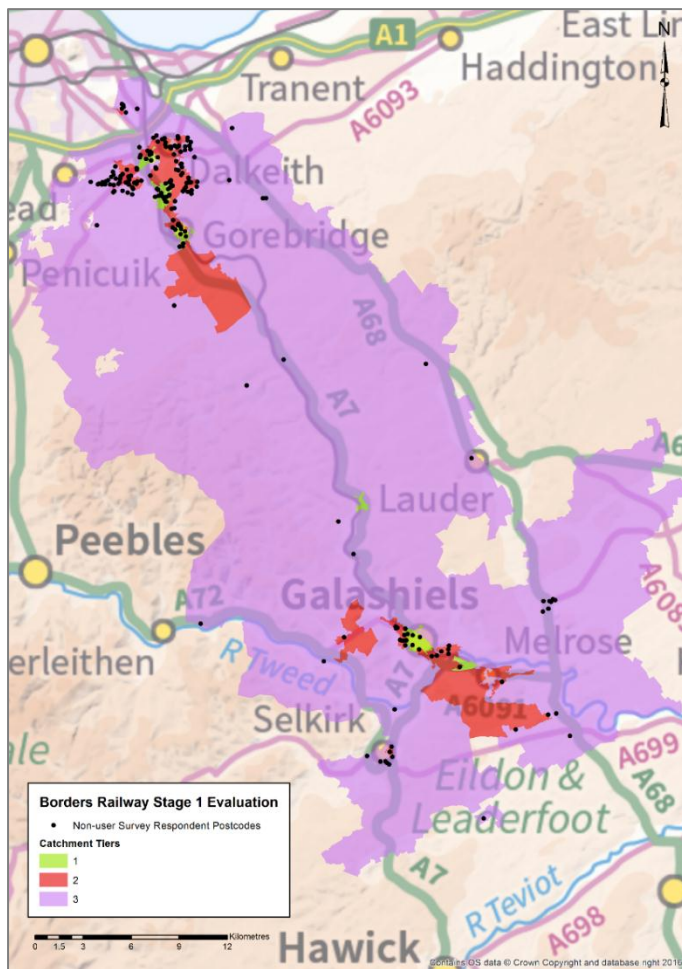
Figure 3.2: Geographical Distribution of Respondent Home Locations

In terms of the tiers, 20% (n=45) of respondents live within Tier 1 areas (where walk-in access is possible); 41% (n=93) live in Tier 2 areas (excluding Tier 1, where reasonable bus-based access is possible); and 39% (n=89) live in Tier 3 areas (excluding Tiers 1 and 2, where car based access is realistic).

Table 3.1: Absolute Number and Percentage of Total Responses by Location

Number of Responses	Tier 1	Tier 2	Tier 3	All Tiers
Midlothian	38	75	56	169
Scottish Borders	7	18	33	58
Total	45	93	89	227
% of Total				
Midlothian	84%	81%	63%	74%
Scottish Borders	16%	19%	37%	26%

Table 3.2 shows the 2011 population within each tier alongside the achieved sample and sample rate. Based on the population in each location, the sample rate ranges from 0.1% to 0.5%, with the largest proportion of respondents drawn from Tier 1 Midlothian.

Table 3.2: Total Population aged 16 (Census 2011) and Sample Rate

		Tier 1	Tier 2	Tier 3	All Tiers
Total Population aged >16	Midlothian	7,814	20,594	16,555	44,963
	Scottish Borders	5,797	10,280	14,754	30,831
Achieved Sample	Midlothian	38	75	56	169
	Scottish Borders	7	18	33	58
Sample Rate	Midlothian	0.5%	0.4%	0.3%	0.4%
	Scottish Borders	0.1%	0.2%	0.2%	0.2%

Figure 3.3 below shows the age breakdown of respondents and the mid-2015 population estimates for the Midlothian and Scottish Borders study areas. Overall, the sample includes a broad cross section of age categories, with the largest proportion of respondents in the 45-54 age bracket. In comparison to the total population, the sample from the Midlothian area is older with a smaller proportion of people aged between 16-44 and a larger proportion of people aged 45-74. In contrast, the Scottish Borders sample has a larger proportion of people in the middle age categories (35-44, 45-54 and 55-59) with a smaller proportion aged 60+ and 16-24.
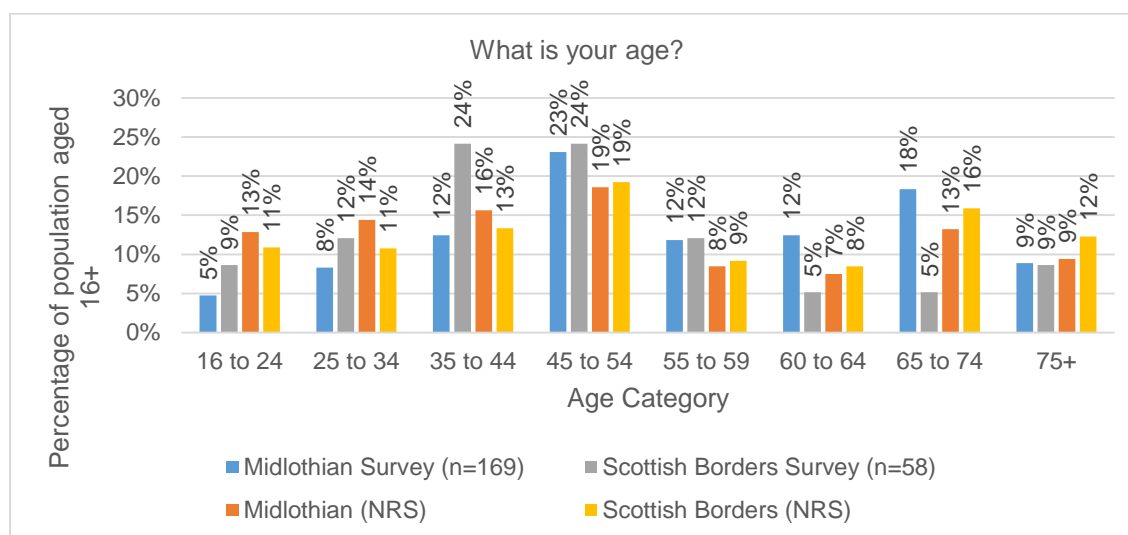
Figure 3.3: Age Breakdown for Study Area (NRS mid 2015) and Respondents

Figure 3.4 shows the distribution of respondents by employment status compared with the Census 2011 distribution for Midlothian and Scottish Borders study areas. The Midlothian sample has a lower share of people in employment and a larger proportion of retirees and unemployed individuals than the population of the Midlothian study area as a whole. The sample from the Scottish Borders is more similar to that of the study area, albeit with a smaller proportion of students.
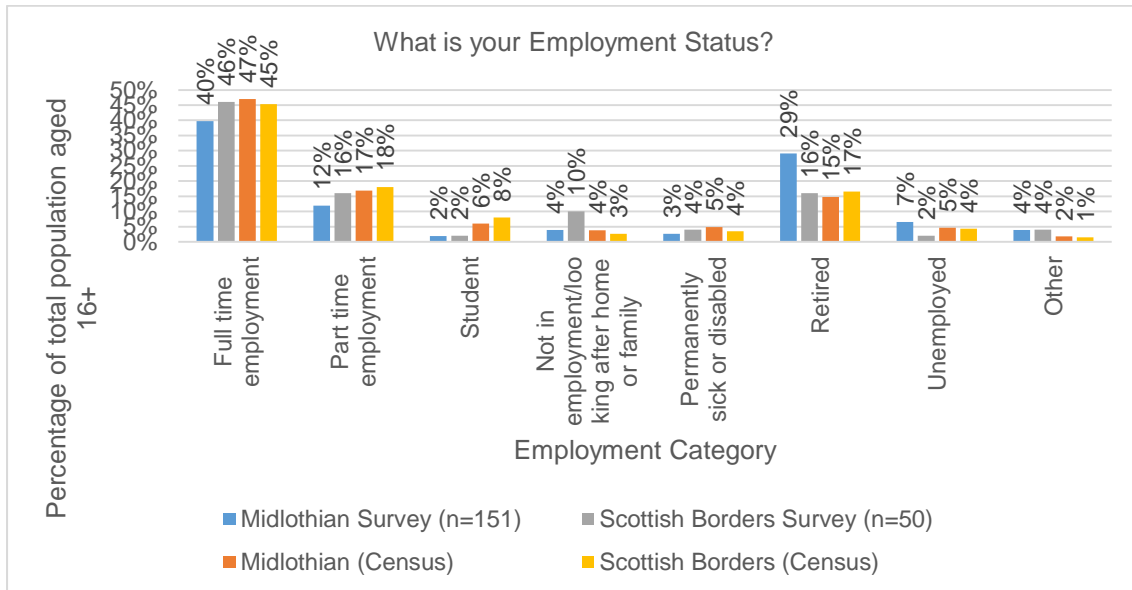

Figure 3.4: Employment Status Breakdown for study Area (Census 2011) and respondents

It is therefore concluded that the sample achieved in the non-user survey is a reasonable representation of the local population.

4   Investment Objectives

Overview

The primary purpose of this research was to provide a high level assessment of the extent to which the new railway is achieving its Investment Objectives. This Chapter provides a summary of the findings of the research from this perspective. In order to frame the argument, the Chapter is structured around a series of key questions aimed at informing each of the FBC Investment Objectives as outlined in the Table 4.1 below.

Table 4.1: Borders Railway Investment Objectives and Key Questions

Investment Objective	Key Questions
Promote accessibility to and from the Scottish Borders and Midlothian to Edinburgh (including the airport) and the central belt	- Where are people travelling to / from on the Borders Railway? - Where do users of the Borders Railway live? - What are people using the Borders Railway for? - How frequently are people making trips using the Borders Railway? - Are people making journeys / taking up opportunities which they did not previously make / do?
Foster social inclusion by improving services for those without access to a car	- What proportion of users of the Borders Railway do not have access to a car? - To what extent has there been changes to the local bus network since the re-opening of the line which may have reduced access for this group
Prevent decline in the Borders population by securing ready access to Edinburgh's labour (jobs) market	- To what extent is the Borders Railway used for commuting trips to and from Edinburgh and the Central Belt? - Have people made changes to their home location as a result of the re-opening of the line? - Have people made changes to their employment as a result of the re-opening of the line?
Create modal shift from the car to public transport	- By which mode did users previously make the journey they are making prior to the re-opening of the line? - How do users get to and from the station? - Has there been any change in car ownership since the re-opening of the line?

Promote accessibility to and from the Scottish Borders and Midlothian to Edinburgh and the Central Belt

Where are people travelling to / from on the Borders Railway?

In order to develop an accurate picture of where users of the Borders Railway are travelling to and from, a detailed analysis of industry 'LENNON' data provided by ScotRail was undertaken. As discussed in Chapter 2, the data was provided in 4-

week ScotRail reporting periods. To provide a complete year of data, the 13 reporting periods 2016/P07 to 2017/P06 were therefore used, covering the period 20/09/2015 to 17/09/2016.   Figure 4.1 below shows the split of trips made to, from or between the Borders Railway Stations (Shawfair to Tweedbank) by 'origin' i.e., trips made using single, return and season tickets:

- bought from Borders Railway stations travelling to other (i.e. non Borders Railway) stations – these could include for example a return ticket from Galashiels to Edinburgh and back as two trips allocated to Galashiels
- bought from Borders Railway stations to other Borders Railway stations
- bought from non-Borders Railway stations to Borders Railway stations – these could include for example a return ticket from Edinburgh to Tweedbank and back as two trips allocated to Edinburgh
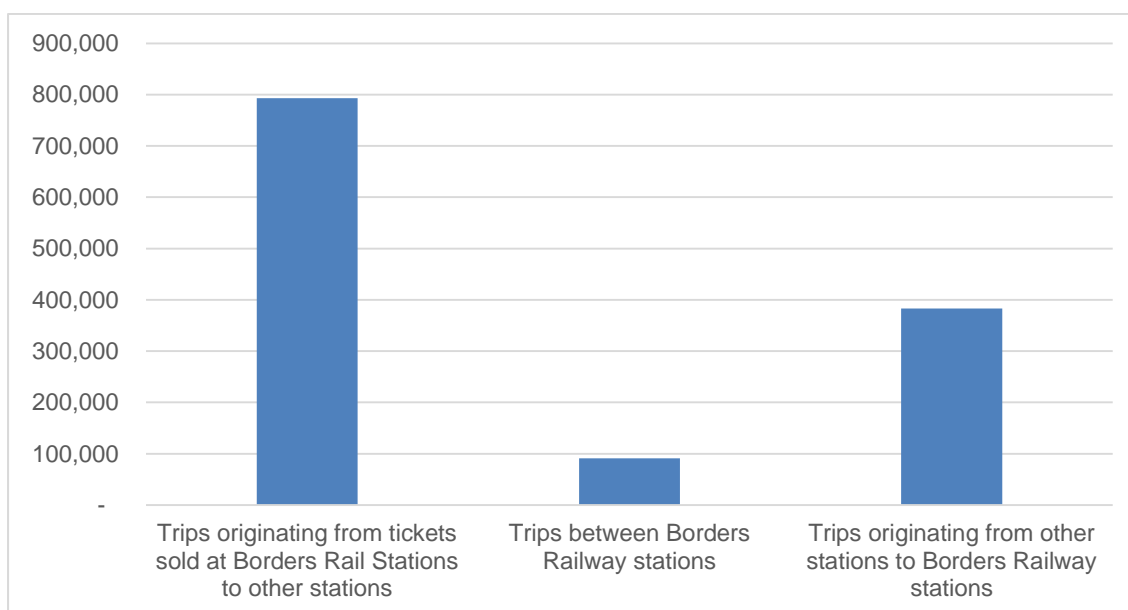
Figure 4.1: Number of Trips by Origin (Lennon 2016/17)

The above figure suggests that 63% of travel originates from the Borders Rail stations to / from elsewhere in Scotland, 7% of travel is between Borders Rail stations and 30% of travel is from elsewhere in Scotland to / from the Borders Railway stations. The ratio of 'outbound' to 'inbound' travel is therefore around two to one.

Figure 4.2 below breaks down these trips by station and shows trips made using single, return and season tickets:

- (1) Outbound: to Non-Borders Railway Stations - e.g. a return from Tweedbank to Edinburgh (counted as two trips at Tweedbank)
- (2) Intra: to other Borders Railway Stations - e.g. a return from Tweedbank to Gorebridge (counted as two trips at Tweedbank)
- (3) Intra: from other Borders Railway Stations - e.g. a return from Gorebridge to Tweedbank (counted as two trips at Tweedbank)

> Note that (2) and (3) comprise the same trips expressed in a different way – it would be double counting to include these twice
- (4) Inbound: from non-Borders Railway Stations – e.g. a return trip from Edinburgh to Galashiels (counted as two trips at Galashiels)
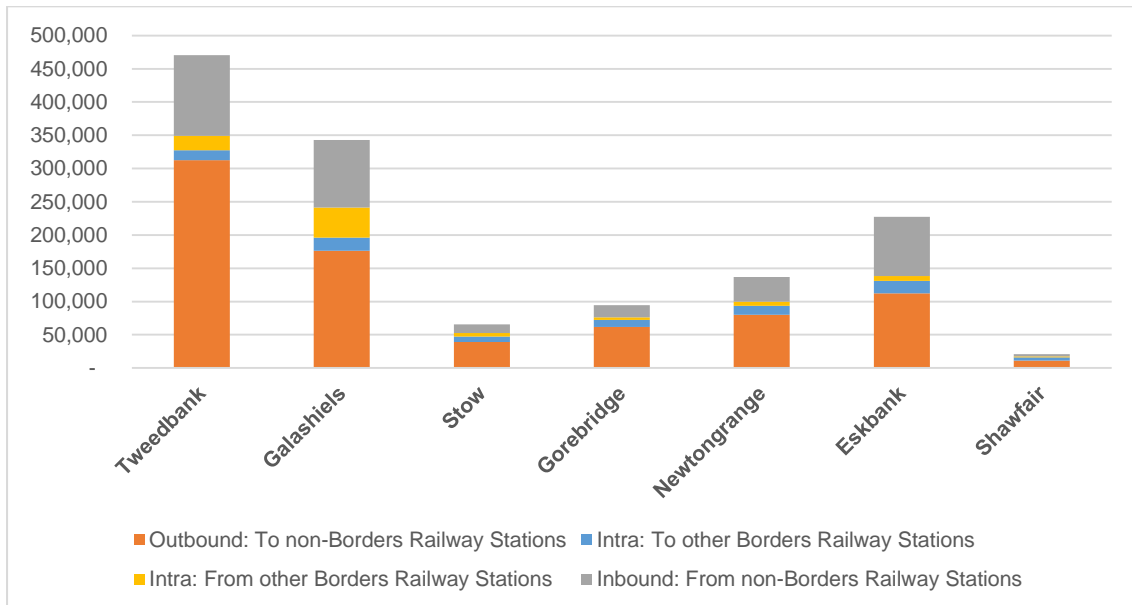

Figure 4.2: Number of Trips by Station (Lennon 2016/17)

By some distance, the single biggest component of demand on the line is from Tweedbank outbound. Passenger numbers originating from the Scottish Borders stations are much higher than at the Midlothian stations, accounting for 67% of 'outbound' trips and also 63% of inbound trips.

The main elements of intra-Borders Rail travel are shown in Figure 4.3 below. In this chart the figures are the sum of the ticket sales in both directions (i.e. Newtongrange to Galashiels plus Galashiels to Newtongrange). The main intra-line movement is therefore between Tweedbank and Galashiels, followed by Galashiels to Eskbank, although overall these volumes are low.
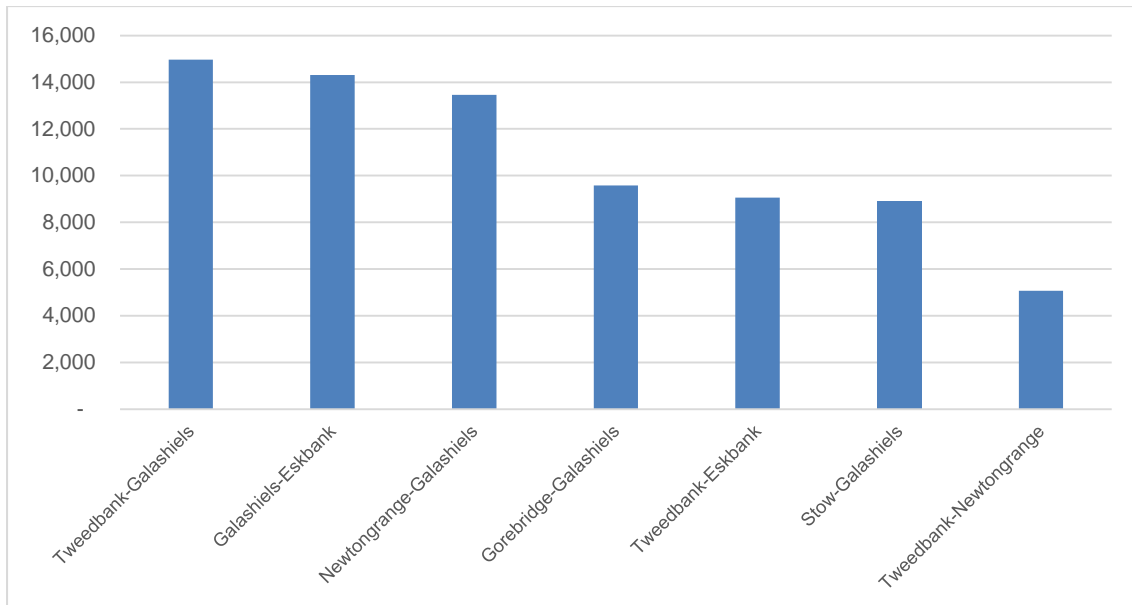
Figure 4.3: Intra-Borders Rail Travel (Lennon 2016/17)

Figure 4.4 shows the top 10 destinations for tickets bought at the new Borders Railway stations. Overall, the top 10 destinations account for 93% of all trips made in terms of tickets bought at the new Borders Railway stations. Edinburgh Waverley is the most frequent destination for those buying tickets at each station, with trips to Edinburgh accounting for 60% of the overall total. There is also evidence of Midlothian residents using the train to make trips down the line to the Borders. For example, Galashiels is the second most frequent station for those buying tickets at Newtongrange.
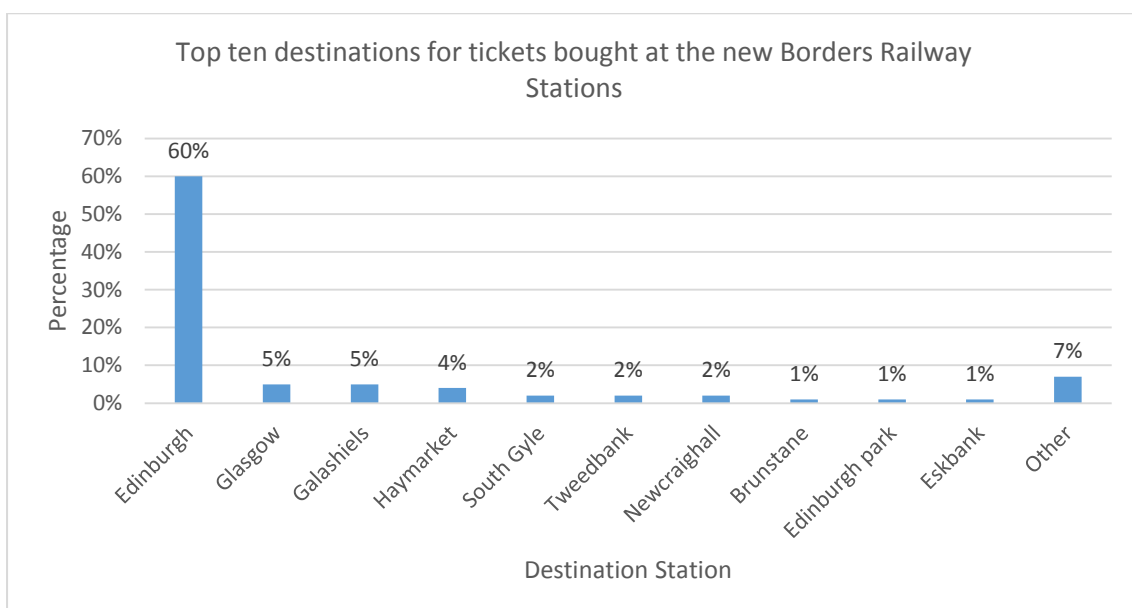
Figure 4.4: Top Ten Destinations for Tickets bought at the new Borders Railway Stations (Lennon 2016/17)

Figure 4.5 shows the origin stations of all trips made **to** the Borders Railway stations. There is a slightly wider distribution of trips to the stations on the line, with Edinburgh Waverley this time accounting for only 45% of trips. Glasgow accounts for 8% of inbound trips. There are a very large number of stations from which very small numbers of trips are made and these comprise the 15% 'Other' trips.
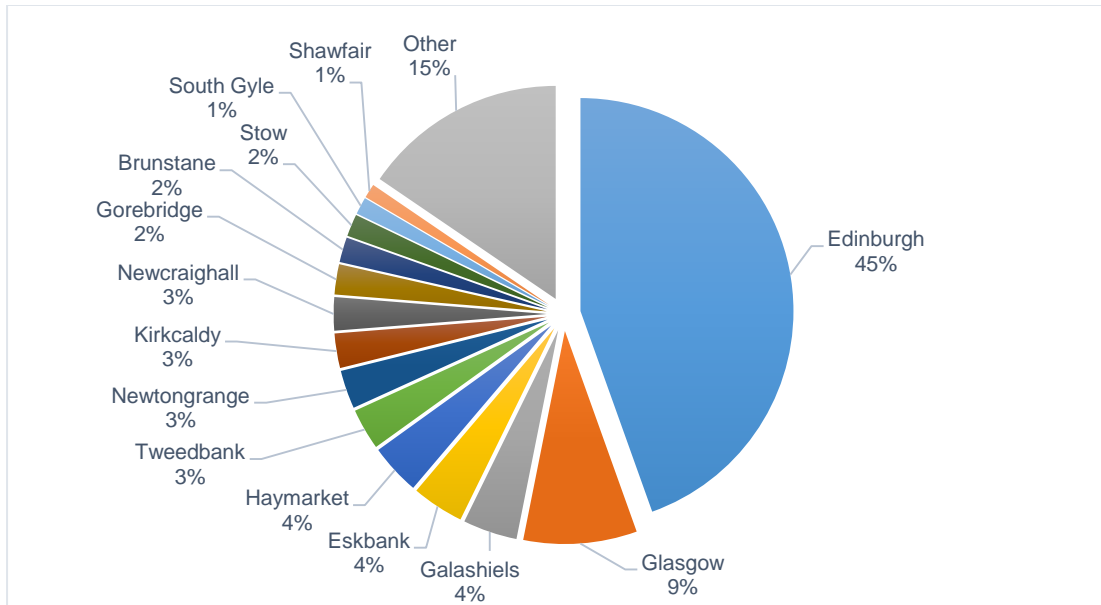
Figure 4.5: Origin Stations of all Trips made to the Borders Railway Stations (Lennon 2016/17)

Key Point:
The majority of patronage on the line is outward with passenger numbers from the Scottish Borders stations much higher than Midlothian stations, and Tweedbank accounting for the biggest component of demand.
Edinburgh Waverley is the most frequent destination for those buying tickets at Borders Rail Stations. However, there are also trips to / from elsewhere in the Central Belt including Glasgow and Kirkcaldy.

Where do users of the Borders Railway live?

Table 4.2 provides a breakdown of the responses to the User Survey by the home location of the respondent along with the estimated total number of single annual trips associated with the responses. The geographical distribution of those respondents based in the UK is also shown graphically in Figure 4.6. Overall, 60% (n=669) of the users captured in the survey lived in the Scottish Borders compared to 8% (n=84) from Midlothian and 7% (n=81) from Edinburgh. In terms of journeys, 59% originate in the Scottish Borders compared to 12% from Midlothian and 9% from Edinburgh. There were also considerable numbers from elsewhere in Scotland, the UK and overseas.

Table 4.2: Number and Percentage of Responses and Journeys by Home Location of Respondent

Location	Number of Responses	Percentage of Responses	Number of Single Journeys	Percentage of Journeys
Scottish Borders	669	60%	83,996	59%
Midlothian	84	8%	16,684	12%
Edinburgh	81	7%	12,294	9%
Other Scotland	104	9%	7,846	6%
Other UK	46	4%	1,326	1%
Overseas	23	2%	1,510	1%
Home location not provided	105	9%	18,126	13%
Total	1,112	100%	141,782	
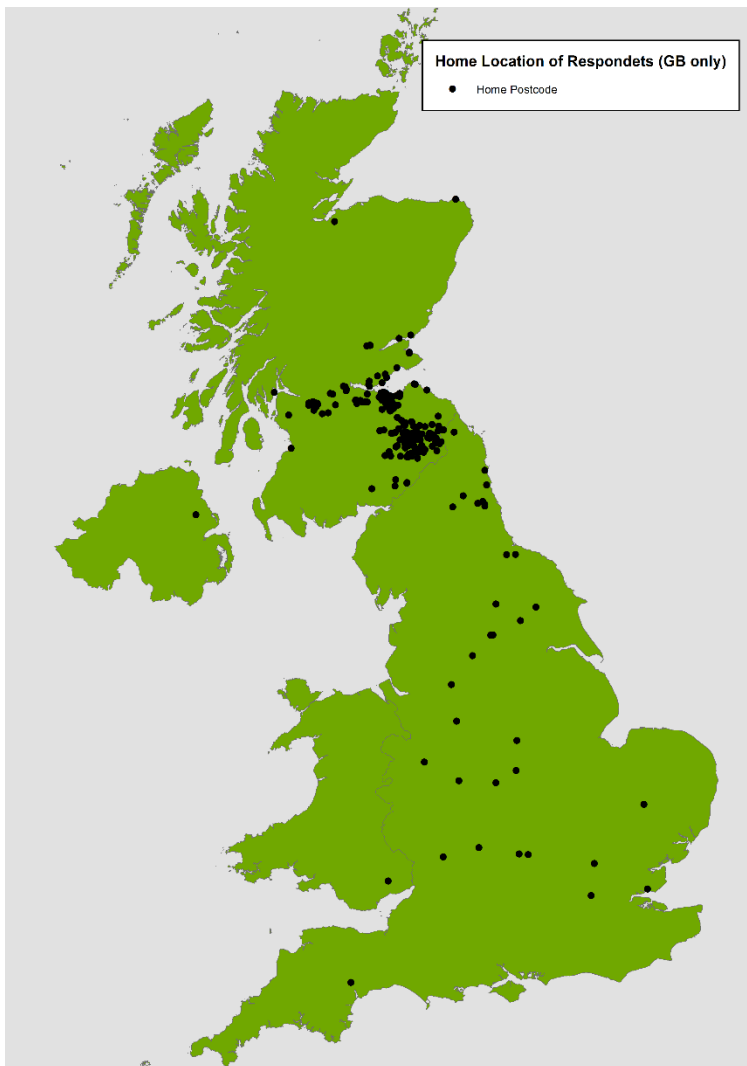
Figure 4.6: Home Location of Respondents to the User Survey (UK Only)

Figure 4.7 and 4.8 below show the home location of the respondents who started their journey at each of the stations in the Scottish Borders and Midlothian respectively. As shown, the catchment areas for Tweedbank is far larger than that of each of the other stations, with Tweedbank users travelling from as far away as Duns, Coldstream and Peebles to use the station. In contrast the majority of users for each of the other stations on the line are concentrated within a much smaller, local area. The relatively large size of the catchment area for Tweedbank may in part account for the higher than predicted patronage at this station.
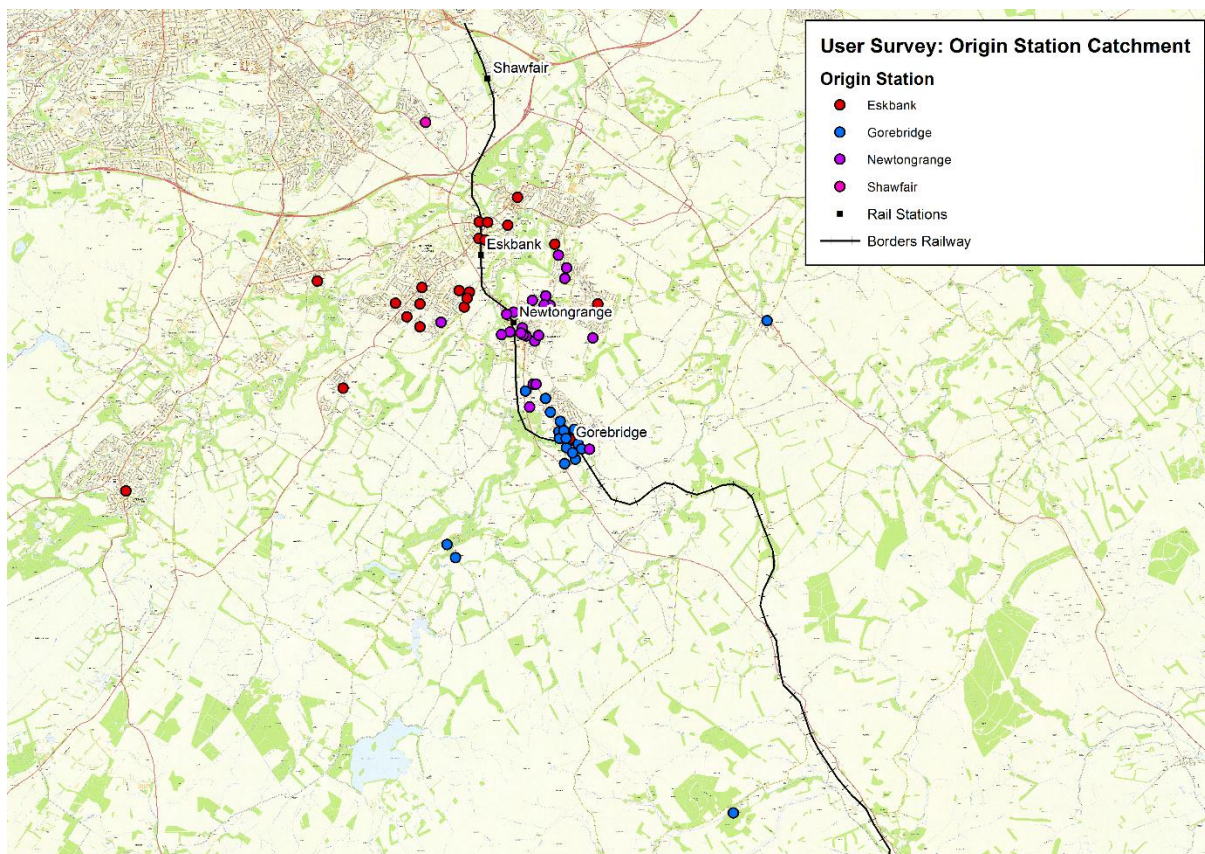
Figure 4.7: Catchment area for Midlothian Stations
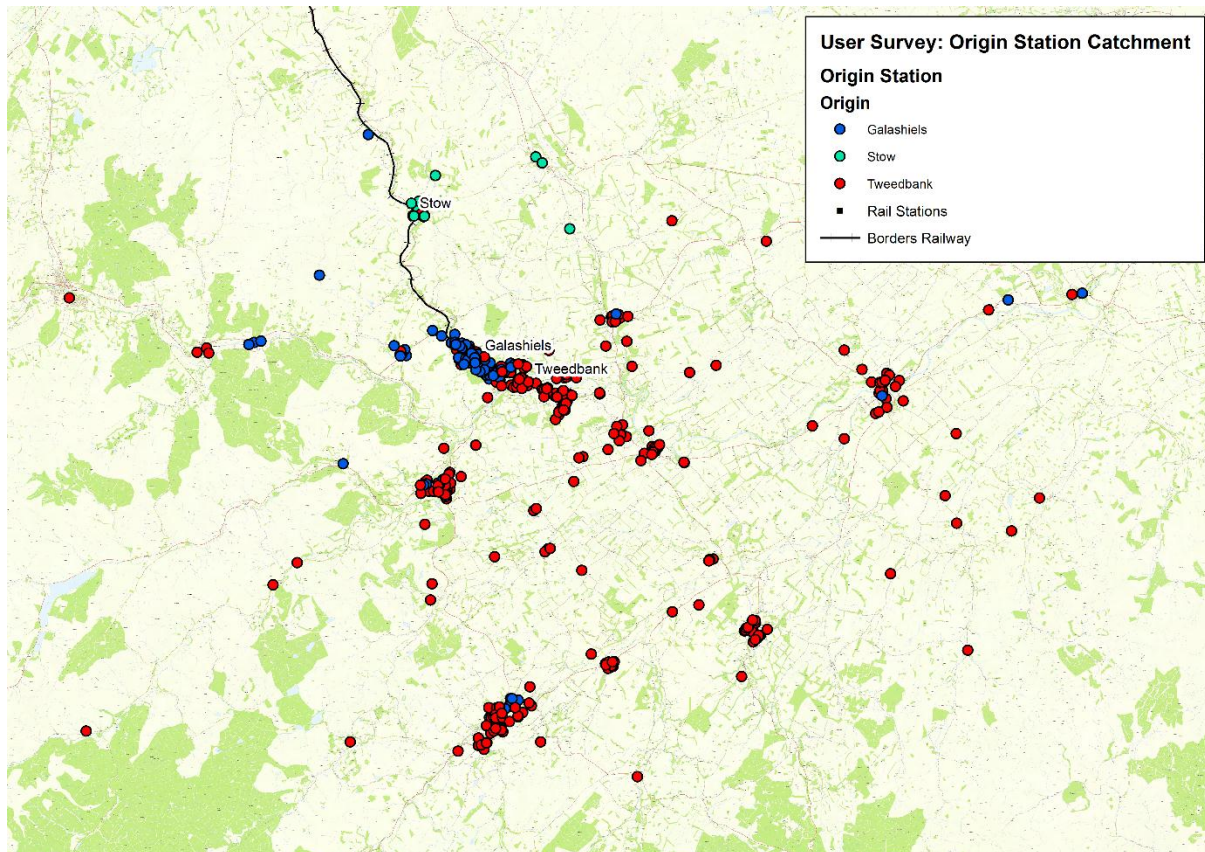
Figure 4.8: Catchment area for Scottish Borders Stations

Key Point:
Overall, 60% of the users captured in the survey lived in the Scottish Borders compared to 8% from Midlothian and 7% from Edinburgh. There were also considerable numbers from elsewhere in Scotland, the UK and overseas.
The catchment area for Tweedbank Station covers a considerably larger area than that of the other stations, where the catchment is much more local. People are travelling further to reach Tweedbank from e.g. Selkirk, Kelso, Hawick and Newton St Boswells. As well as being the end of the line, this is a result of the availability of free parking at the site (and the absence of free parking at Galashiels). This wide catchment area may also explain the higher than predicted passenger numbers at this location.

What are people using the Borders Railway for?

Figure 4.9 shows the purpose of respondents' current trip and the same data weighted by the frequency with which respondents make this trip. Overall, when the responses are weighted by trip frequency, commuting is the most common journey purpose accounting for 45% of recorded trips. There are also a considerable number of trips to and from education (20%), such as trips to Edinburgh College, as well as a large volume of leisure users with the majority of leisure trips being shopping. A proportion of these were tourist day trips and overnight stays. These are discussed in more detailed in Chapter 5.

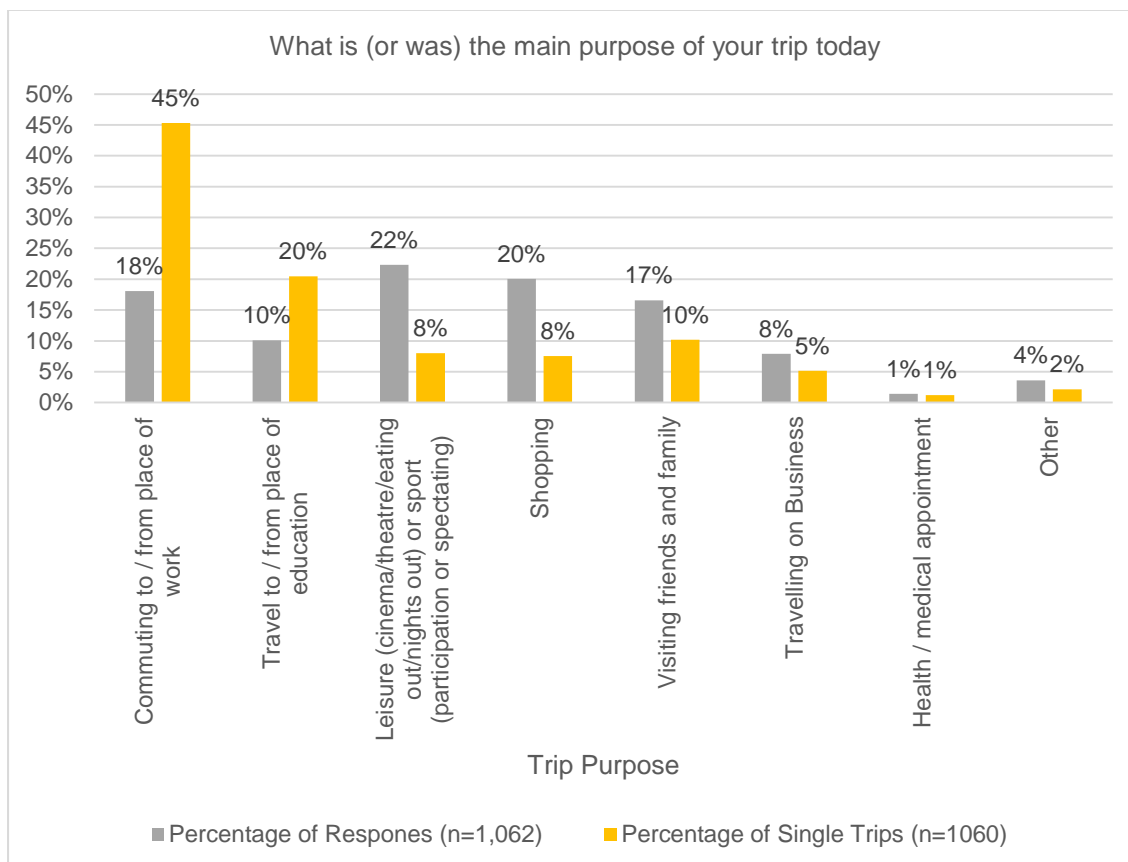What is (or was) the main purpose of your trip today

Figure 4.9: Trip Purpose by Percentage of Responses and Percentage of Single Trips

ScotRail journey purpose data is available for the ScotRail urban network as a whole. This data is drawn from LENNON data and is assumed based on the ticket type purchased. Journeys are broken down into four categories as shown in Table 4.3. While comparisons to these benchmark figures are difficult due to differences in the way the data is collated and categorised, it can be seen that the proportion of commuter trips is broadly in line with the ScotRail figures.

Table 4.3: Proportion of Journeys on the ScotRail Urban Network by Journey Purpose

Journey Purpose	Purpose
Commuter	48%
Business	3%
Leisure	48%

Key Point:
Commuting is the most common journey purpose with commuting trips accounting for 45% of recorded journeys. There are also a considerable number of trips to and from education (20%) and large volumes of leisure users.

How frequently are people making trips using the Borders Railway?

Figure 4.10 shows the frequency with which respondents indicated they make their current trip. Overall, a large proportion of respondents were relatively infrequent users, with the majority (24%, n=257) indicating that they make the journey less than once a month. As shown below, this proportion increases to 32% (n=124) when only those travelling on the weekend were considered.
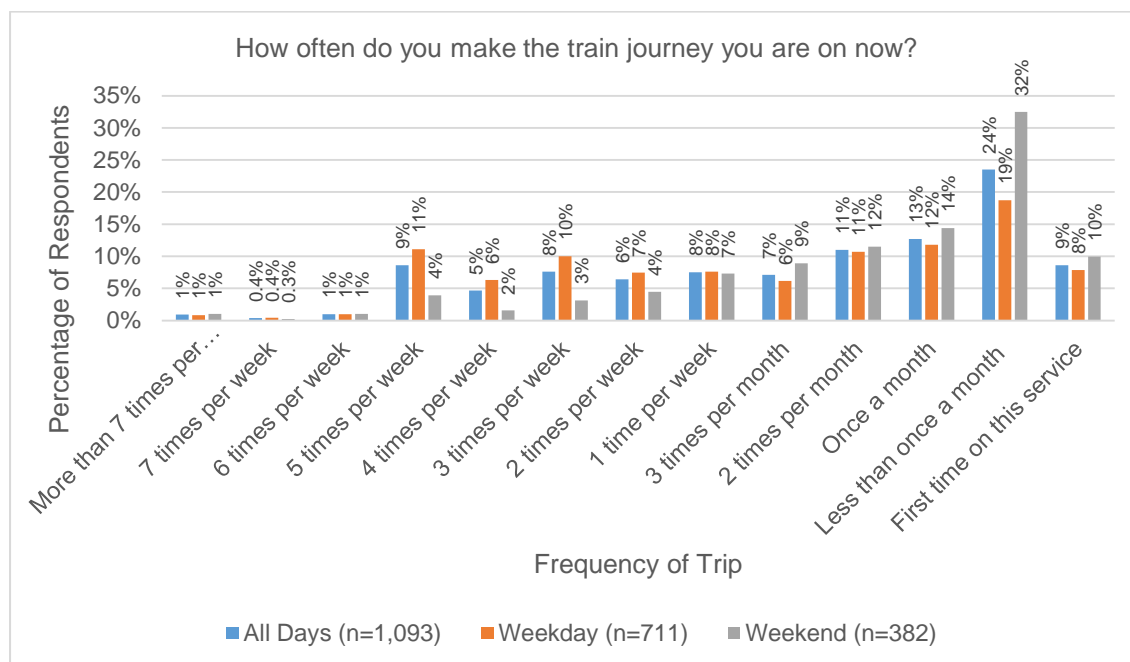

Figure 4.10: Frequency of Trip by weekday / weekend

Key Point:
A large proportion of respondents to the user survey were relatively infrequent users, with the majority (24%) indicating that they make the journey less than once a month.

Are people making journeys / taking up opportunities which they did previously make / do?

Overall 29% (n=305) of respondents to the User Survey said that they did not previously make their current trip prior to the re-opening of the railway. The frequency with which each respondent indicated they made their current trip was used to calculate an estimated annual trip figure for each respondent using the conversion factors included in Appendix B. Using this approach, it is calculated that an estimated 50,286 annual trips on the railway or approximately 36% of those recorded via the sample, i.e. over one third of journeys would not have been undertaken had the Borders Railway not been in place.

Respondents to the User Survey were also asked how much they agreed or disagreed with a series of statements about what the Borders Railway had enabled them to do. Figure 4.11 below shows the net agreement (proportion of respondents

who agree minus proportion of respondents who disagree (excluding the '*Don't Knows*') with a range of statements for the sample as a whole and for respondents from Midlothian and the Scottish Borders. Overall, the results suggest that the re-opening of the line has led to people making journeys and taking up a range of opportunities which they previously could not make or do, with the most popular response (in terms of accessing new activities) being '*the Borders Railway has enabled me to access leisure opportunities which I couldn't previously access*' for which net agreement was 29%.

In addition, as well as encouraging new trips, the data suggests that the railway has also been successful (indeed more successful) in encouraging people to switch from car to rail for existing trips. For example, there was a 59% net agreement with the statement '*the Borders Railway has allowed me to access leisure opportunities without using the car / only using the car for a portion of the journey*' and 41% for the statement '*the Borders Railway has enabled me to 'visit friends and family without using the car / only using the car for a portion of the journey*'.
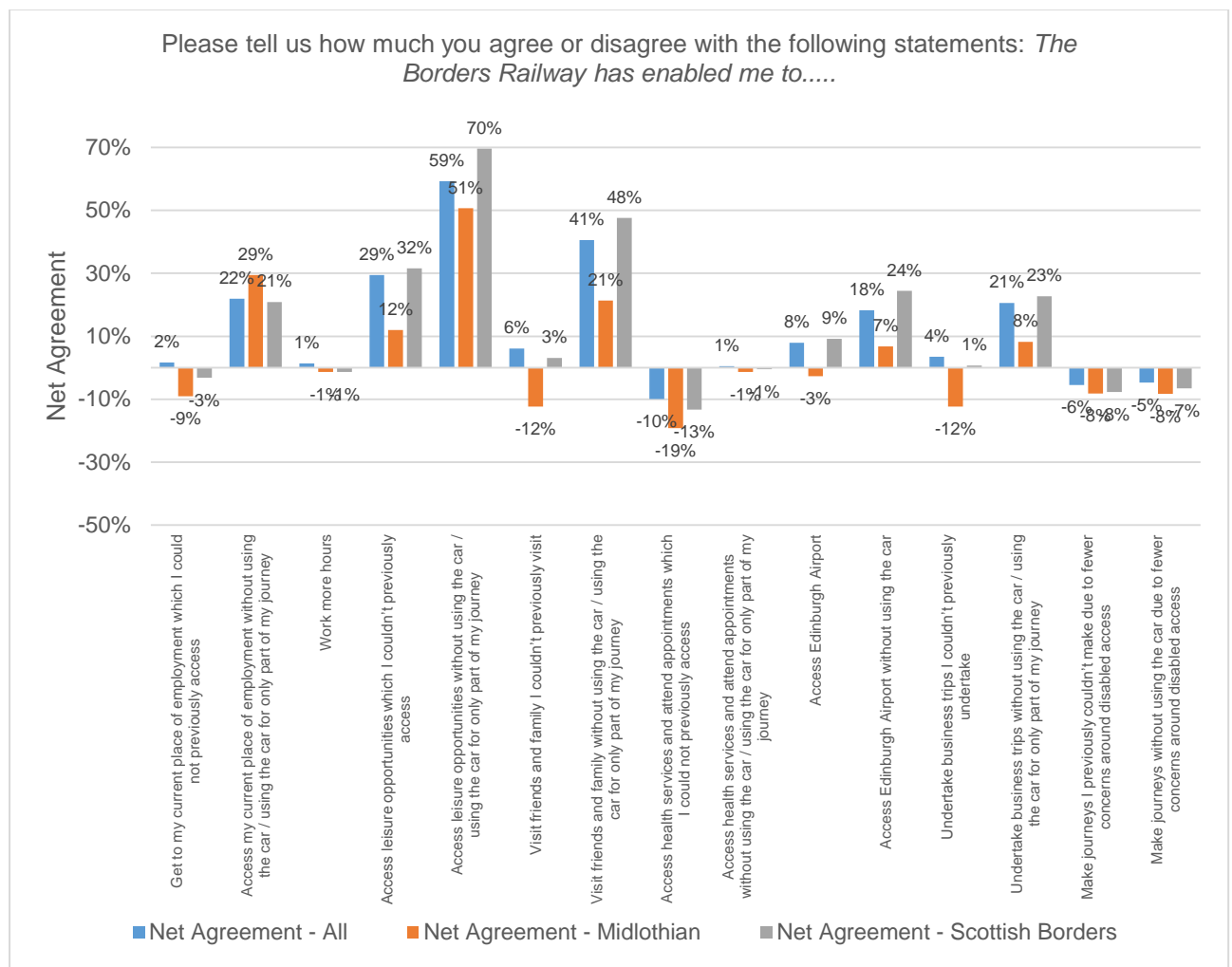
Figure 4.11: The Impact of the Scottish Borders Railway – Net Agreement

Key Point:
The data suggests that the railway is enabling people to make new journeys and take up (particularly leisure) opportunities which they previously could not access, with approximately 50,000 (36%) of the estimated annual single trips recorded via the sample defined as 'new trips'.
There was also strong agreement amongst respondents that the railway has enabled them to access leisure opportunities and visit family and friends without using the car / only using the car for a portion of the journey.

Foster social inclusion by improving services for those without access to a car

What proportion of users of the Borders Railway do not have access to a car?

Overall, 15% (n=138) of respondents to the User Survey stated that their household did not own or have access to a car. This figure fell to 14% (n=121) amongst those from Edinburgh, the Scottish Borders and Midlothian and 11% (n=74) amongst those from the Scottish Borders and Midlothian only[6]. As would be expected car ownership was lower amongst those from Edinburgh with 53% (n=39) of Edinburgh residents stating they did not have access to a vehicle compared to 8% (n=6) of those from Midlothian and 11% (n=68) from the Scottish Borders. It is noted however that the sample size for Midlothian is small. The proportion without access to a vehicle recorded in the survey is lower than the 2011 Census data for the Scottish Borders and Midlothian (20% and 25% respectively). However, rail users are generally drawn from higher income groups and therefore figures below these rates are not unusual.

To what extent has there been changes in the local bus network since the re-opening of the line which may have reduced access for this group?

As discussed in Chapter 2, since the re-opening of the Borders Railway there have been a number of changes to the bus network within the vicinity of the line as a result of declines in patronage. While some of these changes are likely to be a result of other factors, some may be a result of modal shift from bus to rail. Where this is the case, there may be a negative impact on access, particularly for those without access to a car.

In order to examine these changes a bus stop frequency calculation was undertaken using TRACC accessibility software. This calculates a frequency value (number of services per hour) for all bus services stopping at each bus stop over the period for which the calculation is undertaken. Two calculations were completed, one using the public transport network from July 2015 (representing the pre-railway scenario) and the second using the public transport network from October 2016 (representing the post railway scenario).

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[6] The remaining 25 respondents who stated they did not have access to a car came from elsewhere in Scotland, overseas or did not state their home location.

Figure 4.12 and 4.13 show the change in the frequency of buses stopping at each bus stop over this period in the AM peak (0700 – 0930). As shown the frequency of bus services has declined at a number of stops. In Midlothian there is a notable decline in the bus frequency at each bus stop along the A6094 between Dalkeith, Eskbank and Bonnyrigg. This is likely to be a result of service 49 (Portobello - Edinburgh - Dalkeith - Rosewell) being reduced to a 30-minute service in October 2015.

Similar changes have also been made in the Scottish Borders. For example, in August 2016 the frequency of the X95, the key bus link between Edinburgh and Galashiels was reduced from a 30-minute service to an hourly service. It is also evident that there have been a number of reductions in service frequency at bus stops in Galashiels and Tweedbank. These are likely, in part, to be a result of the changes introduced by Frist Group (in August 2016) which saw the reduction / withdrawal of several services linking Galashiels to surrounding towns including Service 61 to Oxton; service 67 to St Boswells; service 68 to Howdenburn, the hourly service 73 to Bannerfield, and services 8 and 9 to Melrose.
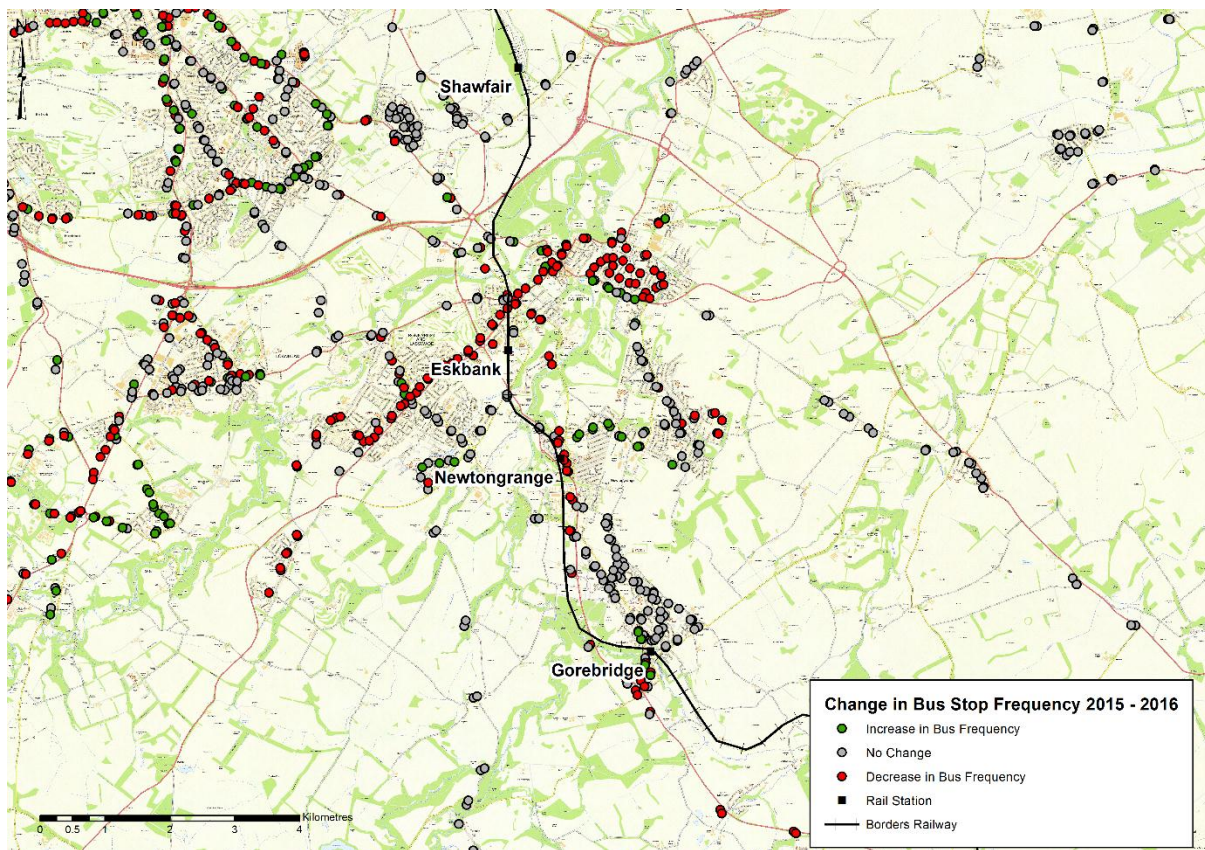
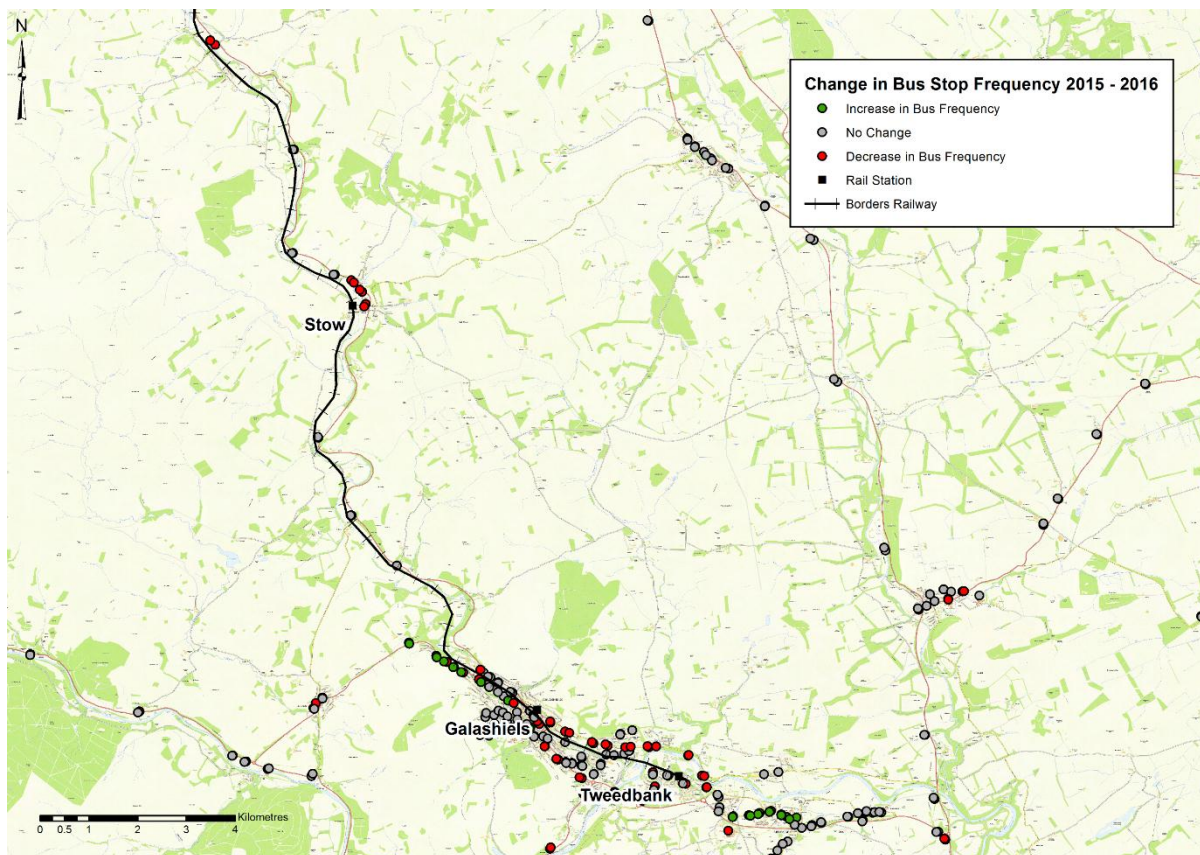Figure 4.12: Change in Bus Stop Frequency 2015 – 2016 (Midlothian)

Figure 4.13: Change in Bus Stop Frequency 2015 – 2016 (Scottish Borders)

Key Point:
The re-opening of the Borders Railway has provided those without a car with a means to more quickly access destinations along the route. The results suggest that 11% of users of the service from the Scottish Borders / Midlothian do not own or have access to a vehicle. This is relatively low compared to the results for the total population of the Scottish Borders and Midlothian as recorded in the 2011 Census but is likely down to the fact that rail users are usually drawn from higher income groups. While the re-opening of the railway has resulted in improvements in access between the stations on the line, there have been changes in the bus network since the railway re-opened which may have resulted in declines in accessibility elsewhere. The extent to which these changes are a result of the new line would depend on the level of abstraction of bus users to rail. This is discussed further below.

Prevent decline in the Borders population by securing ready access to Edinburgh's labour (jobs) market

To what extent is the Borders Railway used for commuting trips to/from Edinburgh and the Central Belt?

As discussed in Section 2.3 of this Chapter, commuting trips accounted for the largest proportion of journeys on the Borders Railway captured by the sample, with

45% of recorded single trips being commuting trips. Of these 70% (n=129) start or end at Edinburgh Waverley while a further 7% (n=14) start or end at stations beyond the Borders Railway.

Key Point:
Commuting is the most common journey purpose when travelling on the Borders Railway, with 70% of commuters starting or ending their journey at Edinburgh Waverley.

Have users made changes to their home location as a result of the re-opening of the Borders Railway?

In total, 10% (n=62) of those from the Scottish Borders and 9% (n=7) of those from Midlothian had moved house since the re-opening of the line. This compares to 25% (n=17) of Edinburgh residents. Figure 4.13 below shows the extent to which the re-opening of the Borders Railway was a factor in respondents' decision to move house. Overall, 56% (n=47) stated that the line *had been a factor* in their decision to move. The proportion of respondents stating that the Borders Railway was a factor was particularly high amongst residents of Midlothian (86%, n=7). However, it is noted that the sample size for this question for both the Midlothian and Edinburgh subgroups is low (n=7 and n=15 respectively) which could influence the reliability of the results.
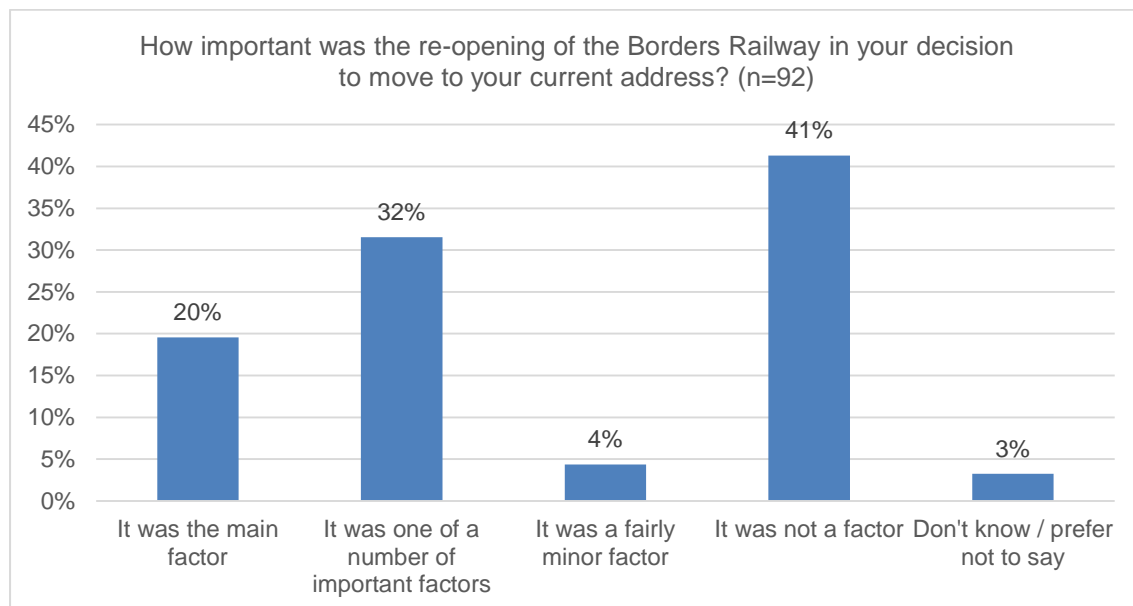
Figure 4.14: Importance of the Borders Railway in Respondents' decision to move house

Figure 4.15 shows the home location of those respondents who provided their current postcode and stated they had moved home since the re-opening of the line. The results are split by those who said that the Borders Railway had been a factor, and those who said it had not been a factor in their decision to move. As shown, the largest proportion of those who moved are located within the catchment area for

Tweedbank, with smaller numbers moving to each of the other stations on the line (excluding Shawfair). This relatively high rate of in movement to the Tweedbank catchment area, if the results of this question are reflective of the wider population, could be a factor in the higher than expected patronage figures recorded at this station. However, it is noted that the sample sizes are relatively small and this could influence the veracity of the results.
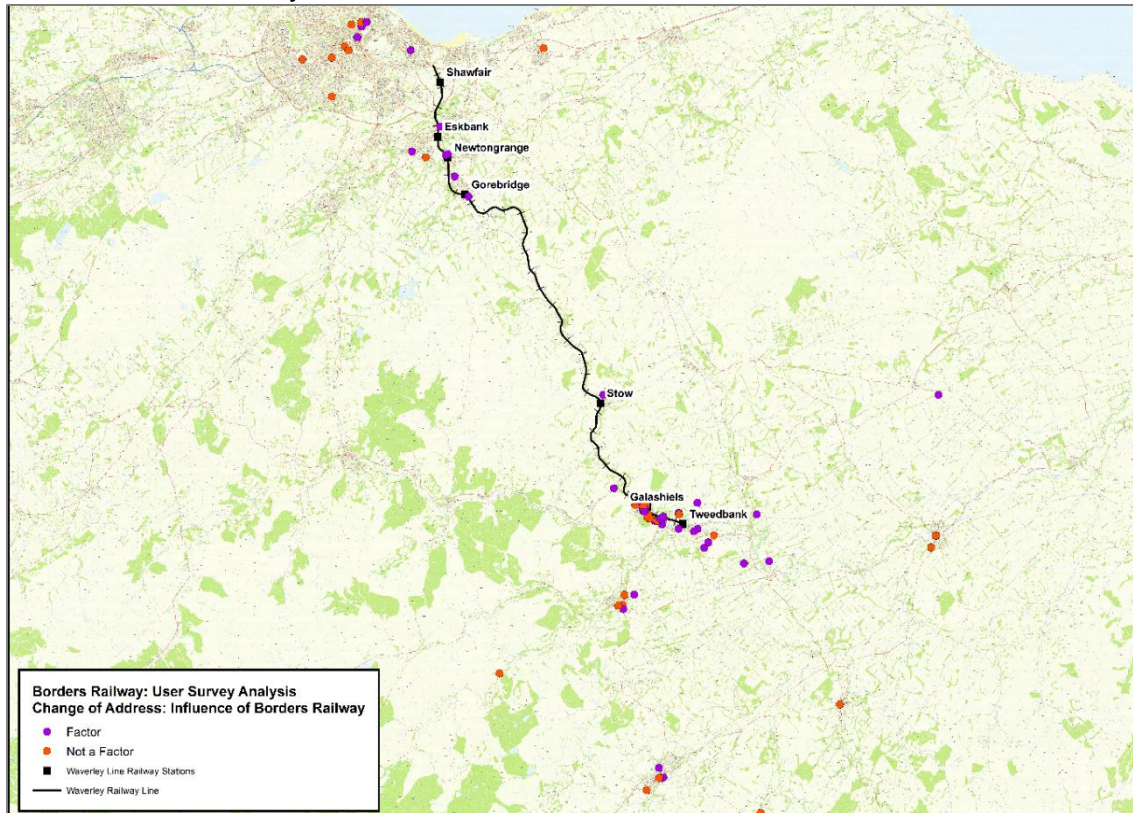

Figure 4.15: Home location of those who have moved home since the re-opening of the Borders Railway and the extent to which the railway re-opening was a factor in their decision to move

Respondents to the User Survey who had moved home were also asked whether they would have moved to their current location if the Borders Railway had not re-opened. Overall, 59% (n=30) of those from Edinburgh, Midlothian and the Scottish Borders who had moved house since the re-opening of the line stated that they would not have moved to their current address if the Borders Railway had not re-opened, with 22% saying that would have moved and 20% saying they did not know. When split by geography the proportions are highest for those living in the Scottish Borders with 64% (n=23) saying that they would not have moved compared to 50% (n=3) of the Midlothian sample. However, as above, it is noted that the sample sizes, particularly that of the Midlothian subgroup is small (n=6).

Key Point:
The results suggest that there is evidence that the Borders Railway has affected peoples' residential choices. Of those identified in the sample who had moved house since the line opened, over half reported that the railway was a factor in determining their current address.

Have users made changes to their employment as a result of the re-opening of the Borders Railway?

In total, 6% (n=49) of respondents to the User Survey from Edinburgh, Midlothian or the Scottish Borders had changed their workplace since the re-opening of the railway. Of these, 53% (n=24) stated that the re-opening of the Borders Railway was the main factor in their decision to move workplace (see Figure 4.16), with a further 29% (n=13) stating that it was one of a number of important factors and 7% (n=3) stating that it was a fairly minor factor.

How important was the re-opening of the Borders Railway in your decision to change your workplace? (n=45)

Category	Percentage
It was the main factor	53%
It was one of a number of important factors	29%
It was a fairly minor factor	7%
It was not a factor	9%
Don't know / prefer not to say	2%
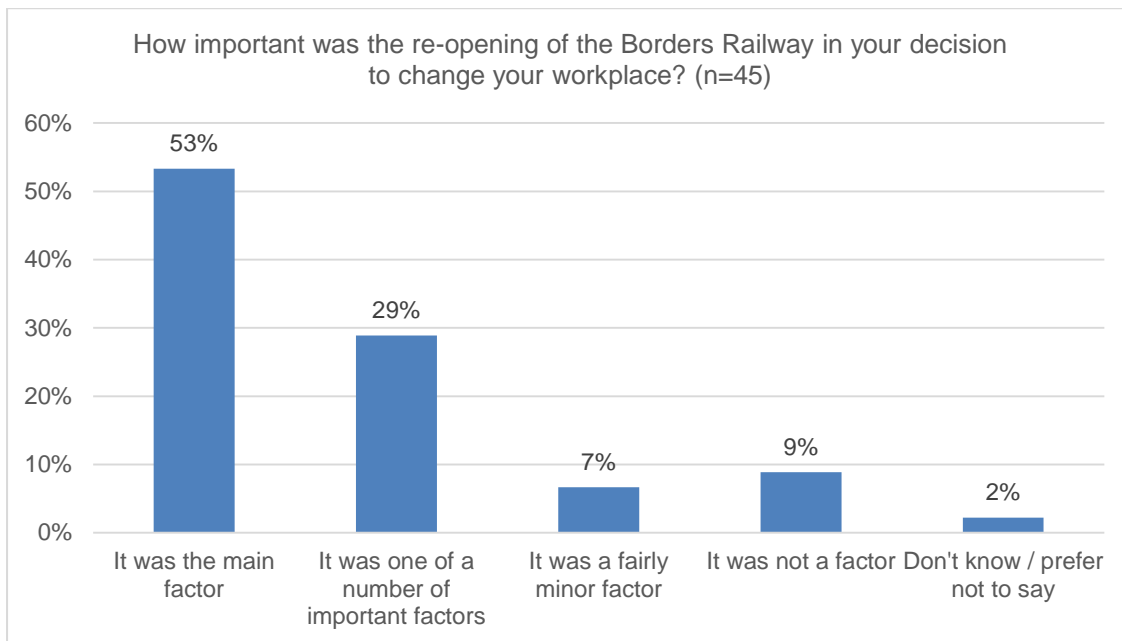
Figure 4.16: Importance of the Borders Railway in Respondents' decision to change Workplace

Respondents were also asked whether the number of hours they work had changed as a result of the re-opening of the Borders Railway. As shown in Figure 4.17, the majority of respondents (53%, n=435) stated that the railway had had no impact on the number of hours they work, with 7% (n=59) stating that they now work more hours and 2% (n=14) stating that they now work fewer hours.
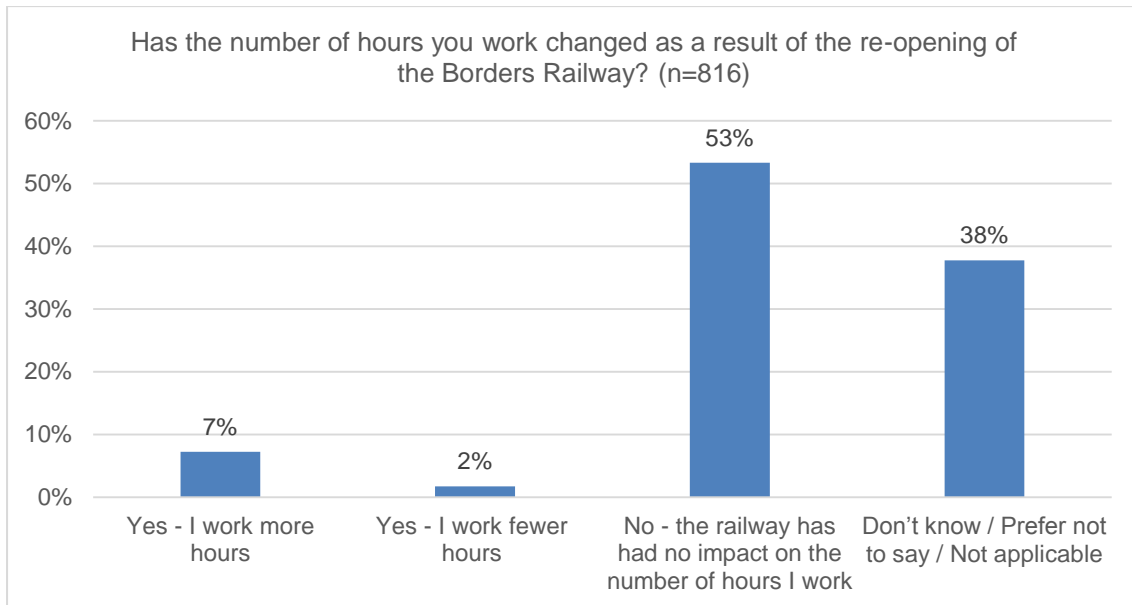
Has the number of hours you work changed as a result of the re-opening of the Borders Railway? (n=816)

Figure 4.17: Impact of the Borders Railway on the number of hours worked by respondents

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.

Create modal shift from car to public transport

By which mode did users previously make their journey prior to the re-opening of the Borders Railway?

Overall, 66% (n=698) of respondents to the User Survey said that prior to the re-opening of the Borders Railway they had regularly made the trip they were making at the time of the survey by another mode. Of these, 678 respondents provided details of the mode they previously used and the majority (57%, n=388) stated that they previously drove all the way to their destination (see Figure 4.18), suggesting that the railway has resulted in significant modal shift from car to rail. In addition, a large proportion previously travelled by bus indicating that modal shift from bus to rail has also occurred. As discussed above, this abstraction of bus users to rail may have contributed to a decline in patronage on some bus services in the area such as, for example, the X95 which links Galashiels to Edinburgh leading to reduced services.
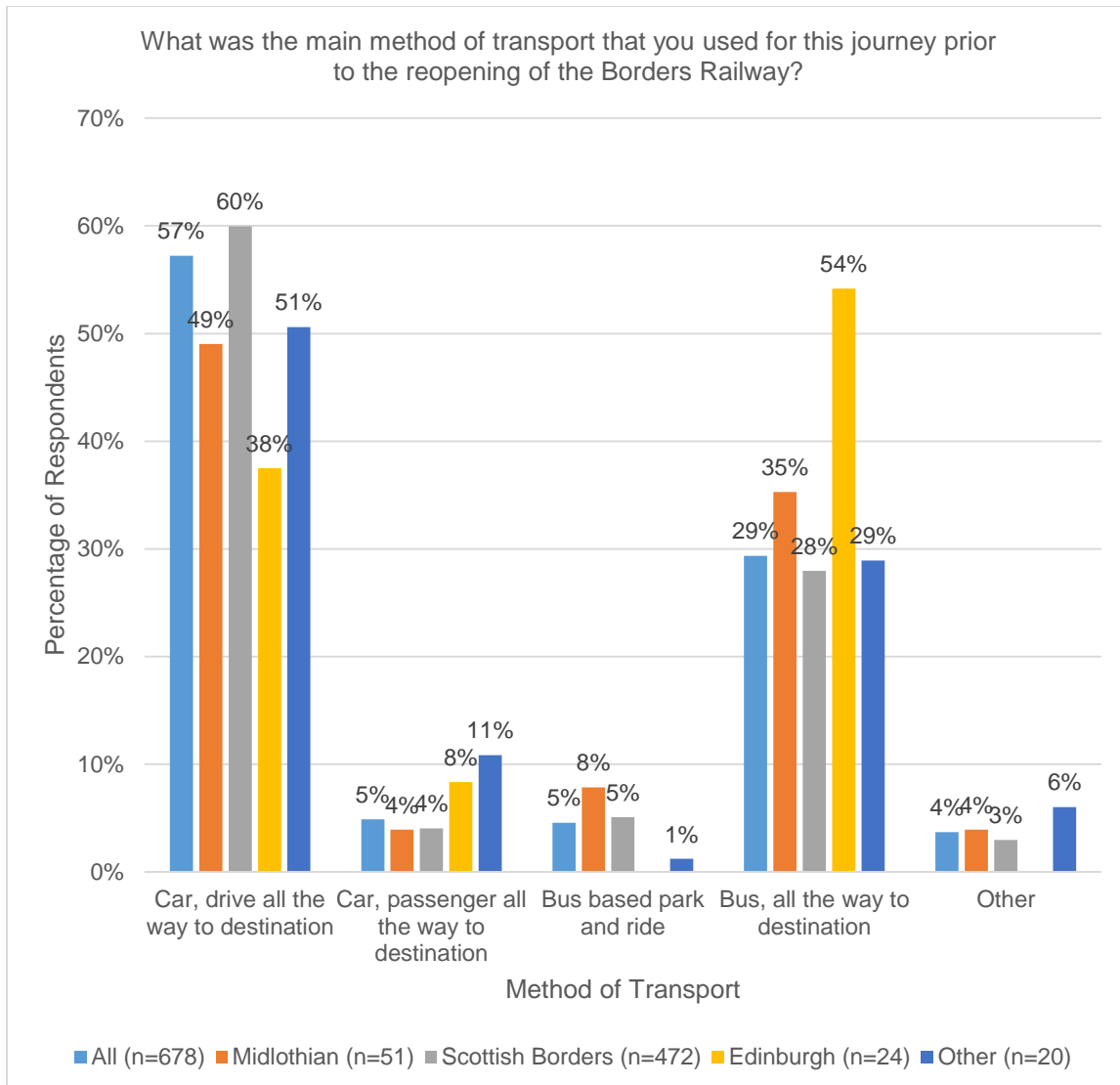
Figure 4.18: Main Method of Transport used by respondents to the User Survey for their current Trip prior to the Re-opening of the Borders Railway

The frequency with which each respondent indicated they made their current trip was used to estimate the number of single trips associated with respondents' previous journeys using the conversion factors in Appendix B. Using this approach, it is estimated that almost 40,000 single car trips and 22,000 bus trips per year have been shifted to rail (see Table 4.4). It is noted however, that this approach assumes that there has been no change in the number of trips made by respondents since the re-opening of the railway and all trips now made by rail by these respondents were previously made by another mode.

Overall 29% (n=305) of respondents to the User Survey said that they did not previously make their current trip prior to the re-opening of the railway. Using the approach discussed above, it is calculated that an estimated 50,286 annual trips on the railway or approximately 36% of those recorded via the sample, i.e. over one third of journeys would not have been undertaken had the Borders Railway not been in place.

Table 4.4: Mode used by respondent for current trip prior to the re-opening of the railway and associated number of single trips per annum

Mode used by respondent for trip prior to re-opening of railway	Number of Responses	Percentage of Responses	Number of implied single Journeys per annum	Percentage of Journeys
Car, drive all the way to destination	388	57%	39,332	56%
Car, passenger all the way to destination	33	5%	2,538	4%
Bus based park and ride	31	5%	3,646	5%
Bus, all the way to destination	199	29%	22,342	32%
Other	27	4%	2,666	4%
Total	678		70,524	

Overall, the above figures suggest that the railway has resulted in almost 40,000 'saved' car trips. While some of these saved car journeys will be offset by the car miles linked with new rail trips for which the car is the station access mode, the latter are likely to be shorter journeys and therefore overall there is likely to be a net reduction in car miles. Although not examined in detail here, this saving in terms of car miles is likely to have led to a number of environmental and other benefits. These include, for example, carbon savings associated with fewer car trips (a key aim of the Scottish Government as set out in the Climate Change Delivery Plan[7]), reductions in congestion (particularly in Midlothian as a result of reduced through traffic) and improvements in local air quality.

Key Point:
The re-opening of the Borders Railway has resulted in significant modal shift from the car to public transport, with the majority of respondents (57%) who previously made their trip by another mode stating that they drove all the way to their destination. Based on the journey frequency of this group this equates to an estimated 40,000 saved car journeys.

While some of these saved trips will be offset by the car miles linked with new trips on the railway for which the car is used to access the station, the latter are likely to be shorter trips and therefore the net impact in terms of saved car miles is likely to be positive with resultant benefits in terms of carbon reduction, congestion and local air quality.

In addition to the shift from car to rail, it is also evident that there has been a shift from bus to rail with 29% of the sample stating that they previously made their current journey by bus equivalent to 22,000 bus journeys.

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[7]Climate Change Delivery Plan: Meeting Scotland's Statutory Climate Change Targets, 2009, Scottish Government, http://www.gov.scot/Resource/Doc/276273/0082934.pdf, accessed 01/03/2017

How do users get to the station?

Figure 4.19 shows the main method of transport used by respondents from the Scottish Borders, Midlothian and Edinburgh to travel to their origin train station for the new Borders Station and Figure 4.20 shows the same data weighted by the frequency with which respondents make their current trip.

As shown, driving and parking at the station is the most common method of transport used by those travelling from Tweedbank Station, with 72% (n=302) of respondents travelling from Tweedbank using this method, equating to 68% (n=29,858) of the journeys for which a mode was provided. In contrast, walking is the most common method of transport to Galashiels, Stow, Gorebridge, and Newtongrange. Overall, the highest percentage share for bus is at Galashiels, with 21% (n=37) of respondents who started their journey at this location travelling by bus, equivalent to 16% (n=4,372) of journeys. It is noted that the sample size for Shawfair is very small (n=2) and therefore the results for this station are unlikely to be reliable.

It is worth noting that the data below provides a snapshot of results at a single point in time. To some extent modal use is seasonal and it is likely that the active travel mode share across all stations would be higher should the survey have been undertaken during the summer months.
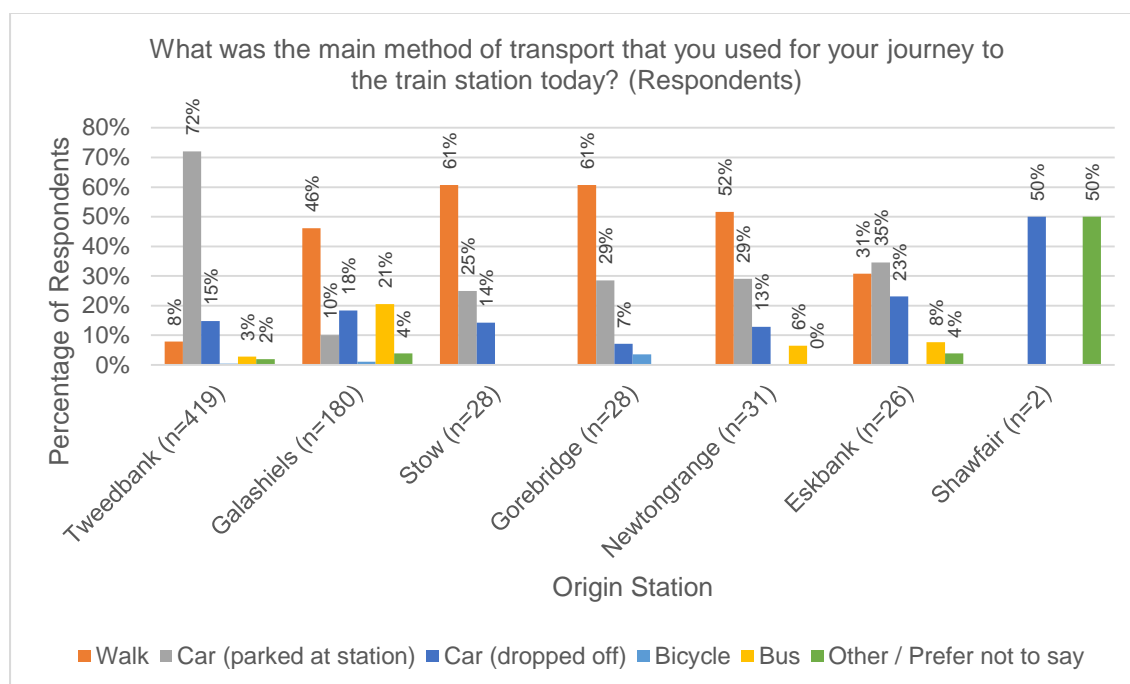
Figure 4.19: Main Method of Transport used to access Train Station (Respondents)
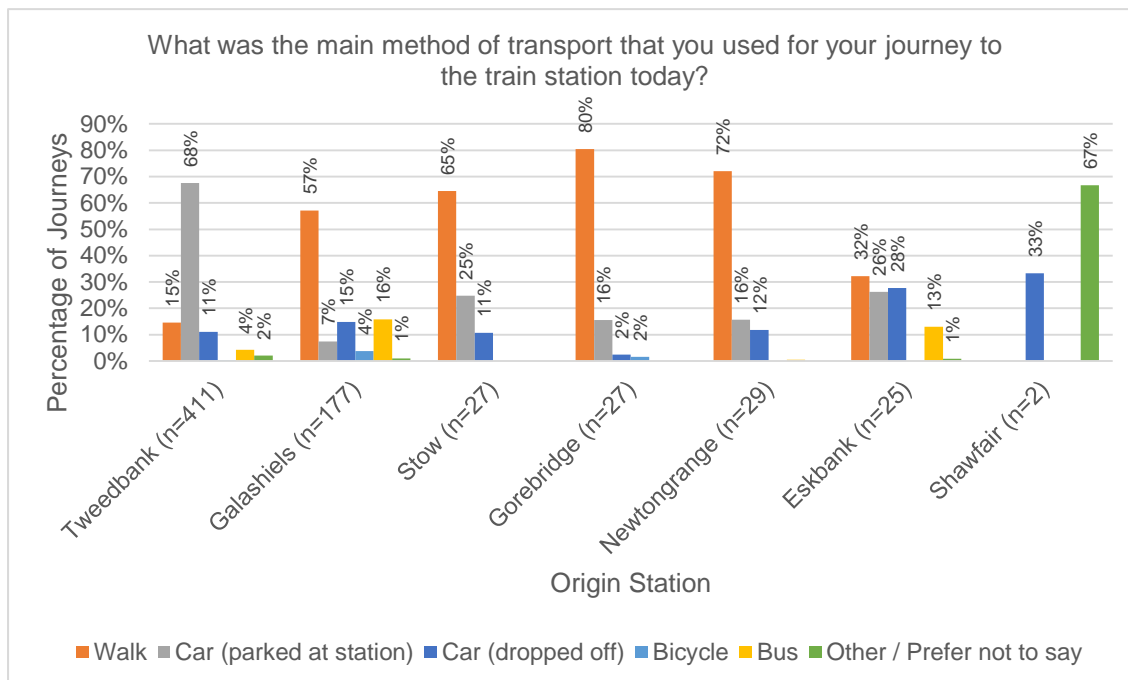
Figure 4.20: Main Method of Transport used to access Train Station (Journeys)

Key Point:
Driving and parking at the station is the most common method of transport used by those travelling from Tweedbank Station, with walking to the station more common at Galashiels, Stow, Gorebridge, and Newtongrange.   Overall, the highest percentage share for bus is at Galashiels followed by Eskbank, with bus accounting for relatively few journeys to the other stations.

Has the re-opening of the Borders Railway resulted in changes in car ownership?

Overall, the majority of respondents to the User Survey (94%, n=783) stated that the re-opening of the line had had no impact on the number of vehicles owned or run by their household. However, 3% (n=22) said that their household had reduced the number of vehicles because they were now able to take the train and 1% (n=5) stated that they had increased the number of vehicles as a result of the removal / changes in bus routes.

How many cars or vans are owned or available to your household? (n=847)
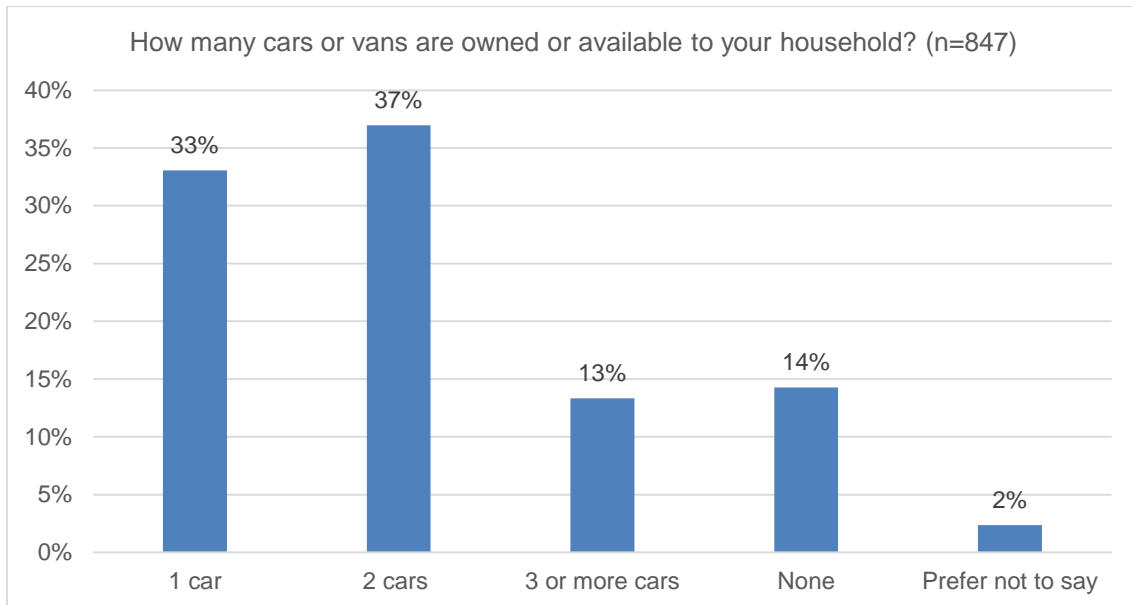
Figure 4.21: Number of cars respondents to the User Survey had access to or owned

Key Point:
While not an objective of the study and perhaps a longer term impact, the results suggest that the re-opening of the line has also resulted in some changes to car ownership levels.

5 Visitor Trips

Overview

As discussed in Chapter 2, initial evidence suggests that there has been an increase in tourist trips to the Scottish Borders and Midlothian since the re-opening of the line. In order to examine this, a series of questions were included in the User Survey aimed specifically at day trippers and those making overnight stays. This Chapter provides a summary of the key findings in this regard. It is noted that due to the time period over which the surveys were undertaken (21/11/16 – 04/12/16) the number of responses from tourists is likely to be low compared to that which would be achieved in peak season. In order to frame the argument, the Chapter is again structured around a series of key questions as follows:

- What proportion of Borders Railway users are tourists?
- To what extent is the re-opening of the Borders Railway a factor in people's decision to make tourist trips?
- What type of accommodation is used by overnight tourists using the Borders Railway and how much do they spend on accommodation?
- What activities are undertaken by tourists using the Borders Railway and how much do they spend on activities?

What proportion of users of the Borders Railway are tourists?

Overall, 39% (n=436) of respondents to the User Survey indicated that the purpose of their journey on the train was either a day trip or overnight stay in the Scottish Borders, Midlothian or Edinburgh. When frequency of trip is taken into account this equates to 15% of annual single trips recorded via the sample. As shown in Figure 5.1, the largest proportion of these were to / from Edinburgh, with day trips to the capital most popular (accounting for 56% of all visitor trips recorded). Day trips to the Scottish Borders were the next most common purpose, accounting for 25% of all visitor trips recorded. Overall, there were fewer trips to Midlothian, with just 2% of recorded trips being day trips and no overnight trips to Midlothian recorded via the sample.
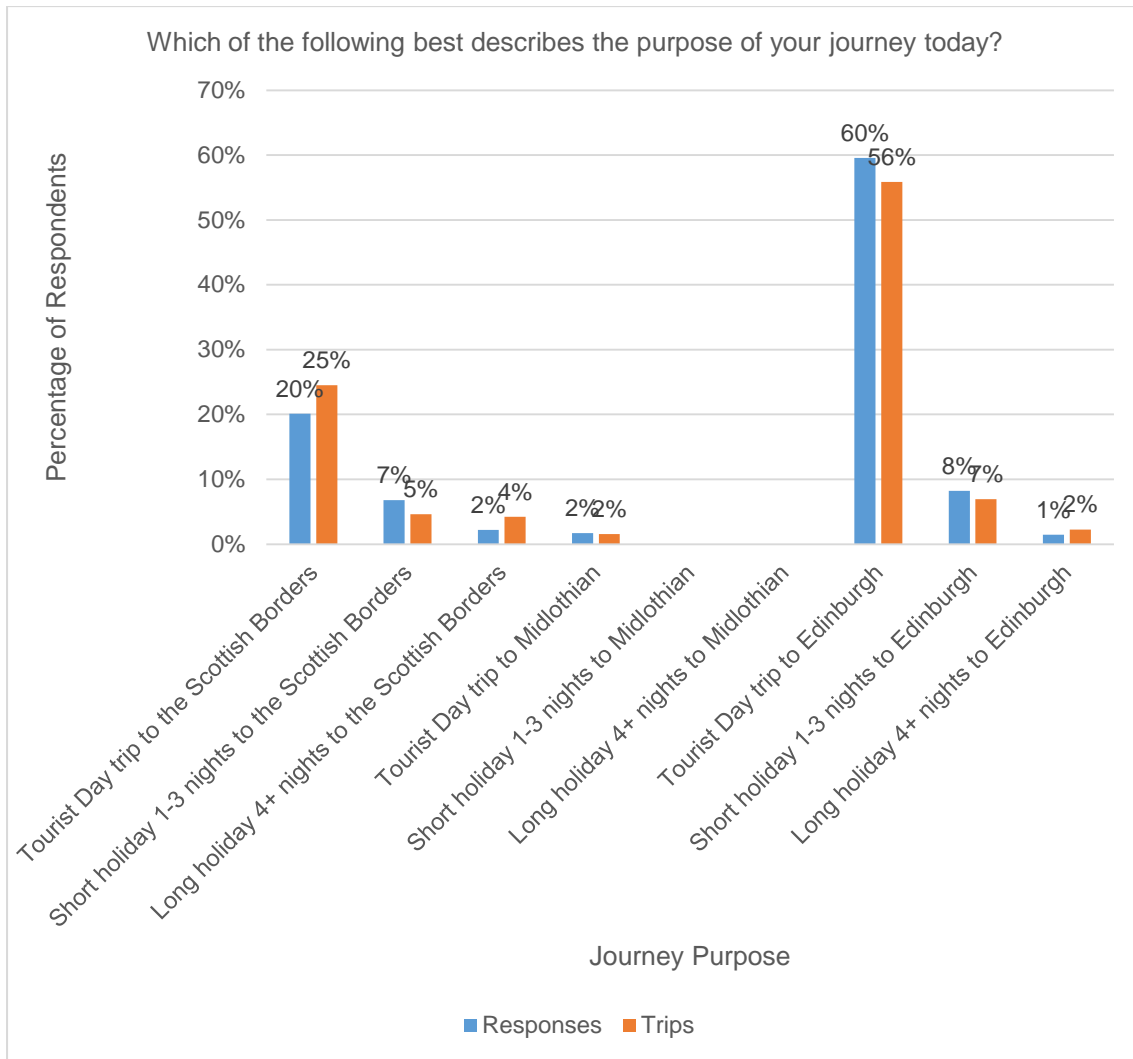
Figure 5.1: Journey Purpose (Day Trips and Holidays)

Figure 5.2 below provides a breakdown of the home location of those who indicated they were travelling for a day or overnight trip for those who provided this information. Overall, the majority (84%, n=301) lived in Scotland with smaller numbers based elsewhere in the UK and overseas.
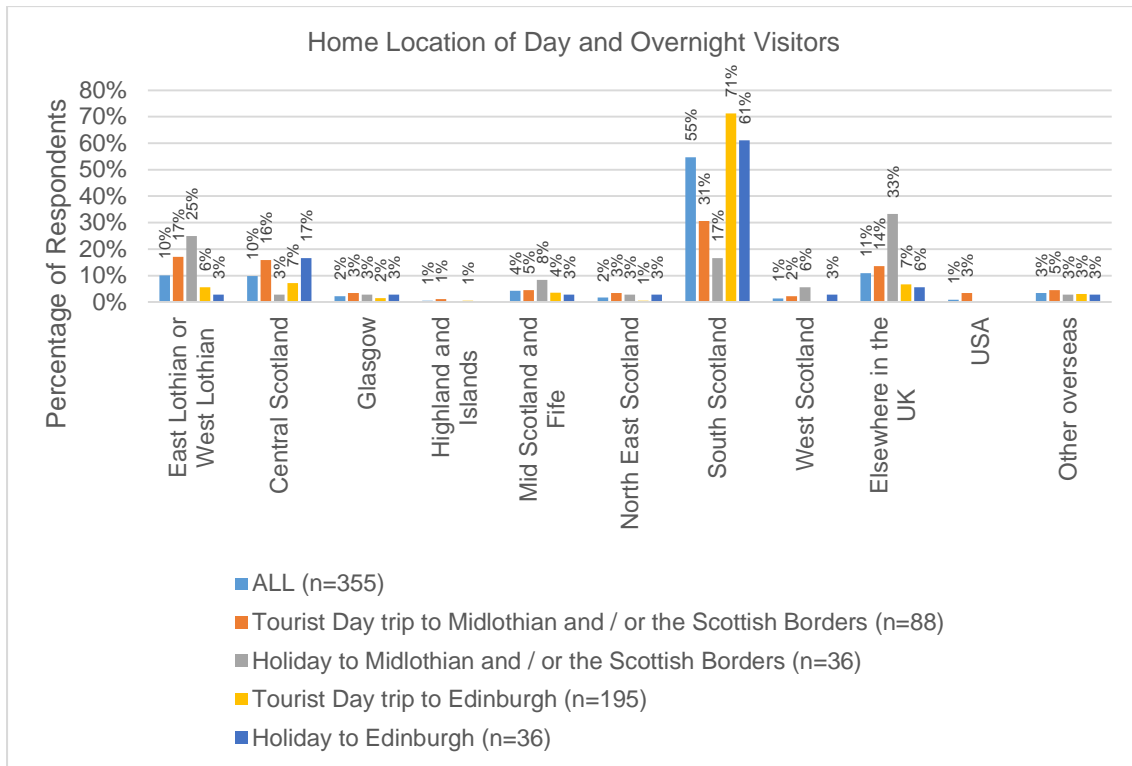
Figure 5.2: Home Location of Respondents who identified themselves as Day and Overnight Visitors

Key Point:
Tourists accounted for 39% of respondents to the User Survey. While the majority of these were Edinburgh based, a considerable proportion of the overall sample (11%) were tourist trips to the Scottish Borders, with a further 2% being Midlothian bound.

To what extent is the re-opening of the Borders Railway a factor in people's decision to make tourist trips?

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 (see Figure 5.3). Amongst those who responded to this question (n=412), 35% (n=145) said the re-opening of the line was the main factor in their decision and a further 22% (n=92) said it was one of a number of important factors. Overall, those travelling to Midlothian and / or the Scottish Borders placed more importance on the re-opening of the line than those travelling to Edinburgh, with those making day trips seeing it as more important than those undertaking longer holidays.

To what extent was the re-opening of the Borders Railway (in September 2015) a factor in you choosing to make this trip?

	It was the main factor	It was one of a number of important factors	It was a fairly minor factor	It was not a factor	Don't know / Prefer not to say
ALL (n=412)	35%	22%	10%	28%	4%
Trips to Midlothian and / or the Scottish Borders (n=136)	43%	21%		22%	
Tourist Day trip to Midlothian and / or the Scottish Borders (n=97)	49%	16%	8%	21%	5%
Holiday to Midlothian and / or the Scottish Borders (n=39)	28%	31%		26%	5%
Trips to Edinburgh (n=256)	31%	24%	11%	31%	3%
Tourist Day trip to Edinburgh (n=219)	35%	21%	12%	30%	3%
Holiday to Edinburgh (n=37)	8%	43%	8%	38%	3%

- It was the main factor
- It was one of a number of important factors
- It was a fairly minor factor
- It was not a factor
- Don't know / Prefer not to say

Figure 5.3: The importance of the Borders Railway in respondents' decision to make their current trip

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=421), 23% (n=98) said they would not have made the trip (see Figure 5.4). As shown below, the proportion selecting this option was slightly higher amongst those visiting Midlothian and / or the Scottish Borders (33%, n=45) compared to those visiting Edinburgh (19%, n=49), with highest figure again being amongst day trippers to Midlothian and the Scottish Borders (37%, n=37).
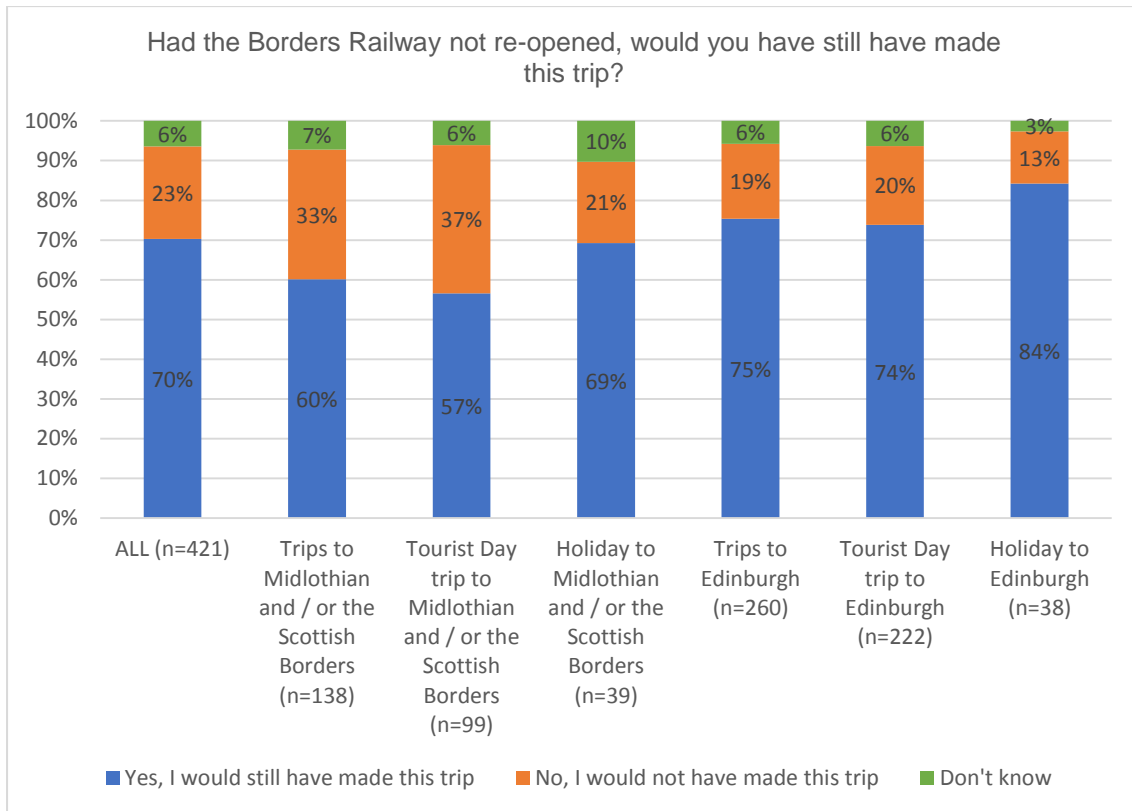
Figure 5.4: Likelihood of respondent making trip if the Borders Railway had not re-opened

Those respondents who indicated they would not have made the trip if the Borders Railway had not re-opened were asked what they would have done otherwise. Of those who responded to this question (n=88), the majority (48%, n=42) stated that they would have stayed at home (see Figure 5.5).
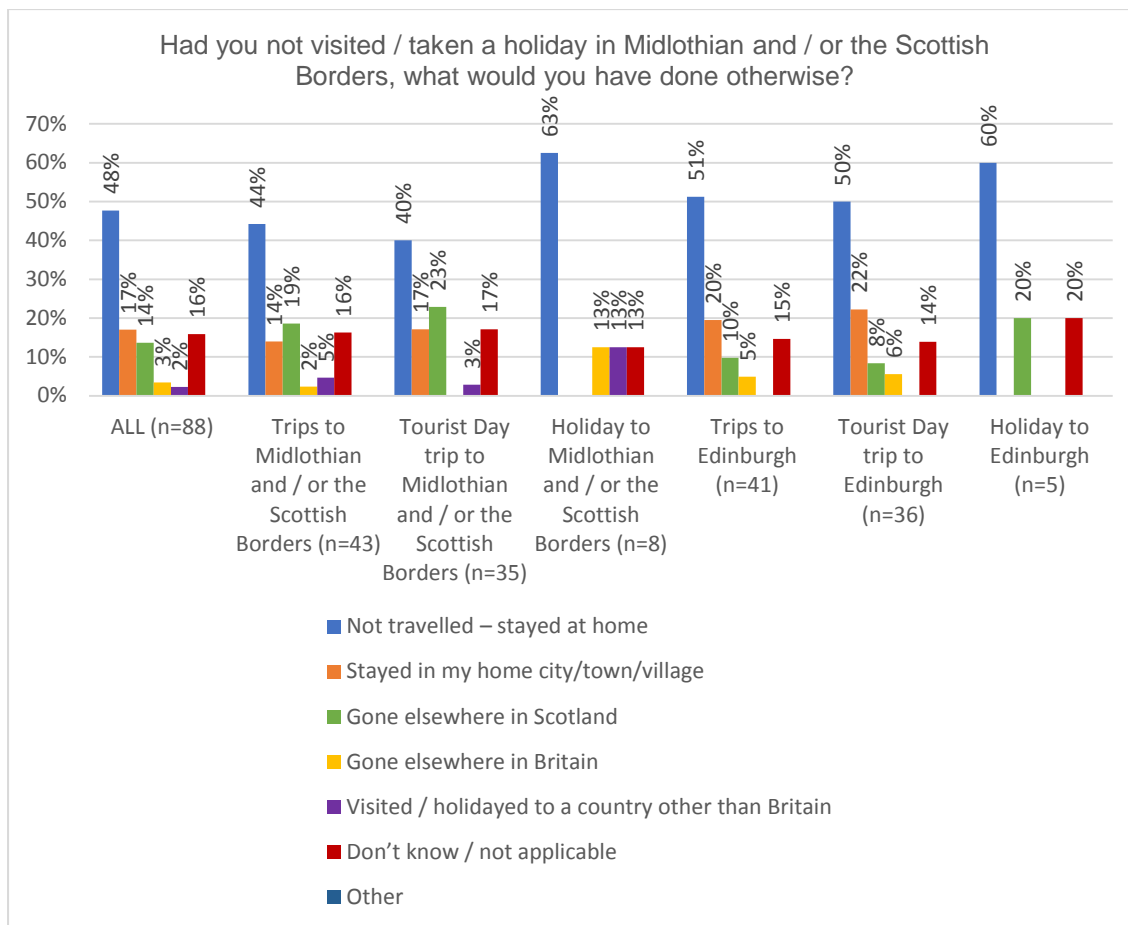
Figure 5.5: Activity undertaken if the respondent had not made current trip

Key Point:
Overall the re-opening of the Borders Railway appears to be a relatively important factor in people's decision to make tourism trips with more than 65% of tourists using the service stating that it was a factor in their decision to make their journey and 23% stating that they would not have made their trip were it not for the rail line.

What type of accommodation is used by overnight tourists using the Borders Railway and how much do they spend on accommodation?

Those who indicated they were making an overnight stay were also asked to provide details of the accommodation which would be / had been used during their visit (see Figure 5.6). For those staying in Edinburgh, the most common option was hotel (59%, n=22) followed by staying with friends and/or family (35%, n=13). Amongst those staying in Midlothian and / or Scottish Borders, there was a slightly wider range of accommodation types with staying with friends and / or family being the most popular response (65%, n=24) followed by hotels (22%, n=8).
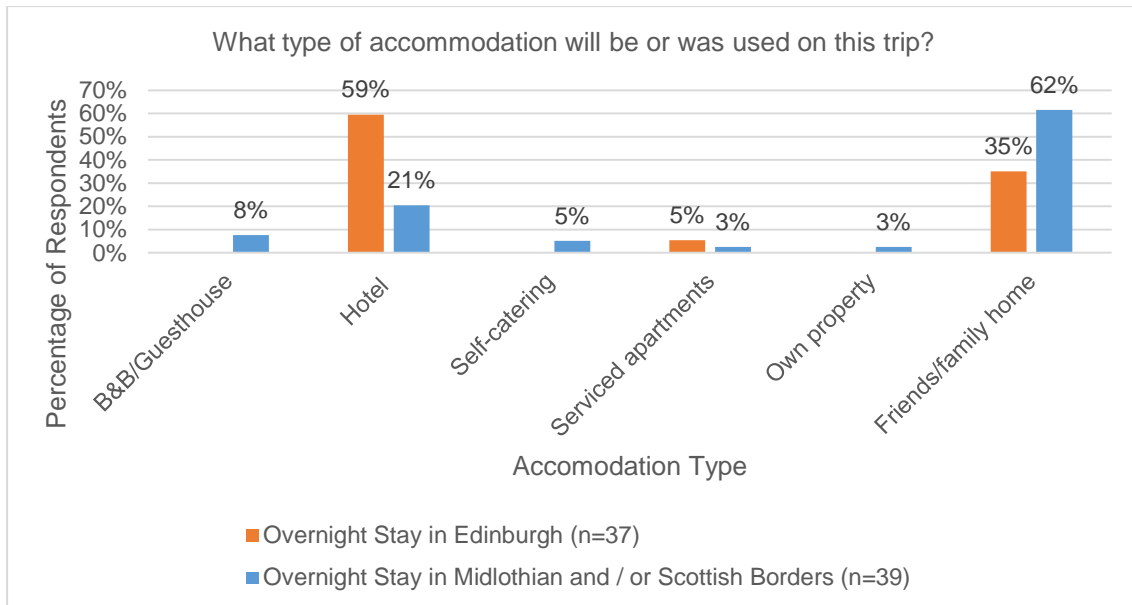
Figure 5.6: Accommodation Type used for Overnight Stays by Trip Destination

Figure 5.7 below shows the amount spent on accommodation by those making overnight trips. Overall, the majority (39%, n=30) did not pay for accommodation, with the proportion who did not pay being higher amongst those visiting the Scottish Borders and / or Midlothian (49%, n= 18) than those visiting Edinburgh (31%, n=12). In the main those staying in Edinburgh were paying more for their accommodation than those staying within the Scottish Borders and / or Midlothian.
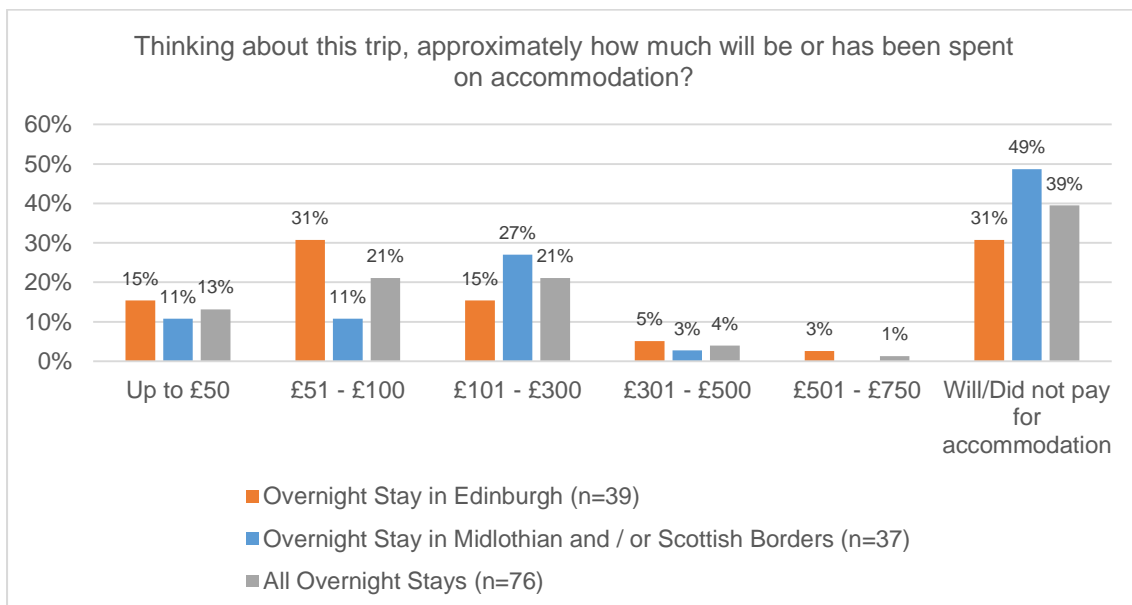
Figure 5.7: Approximate amount spent on overnight accommodation by those making overnight trips by trip destination

Key Point:
Hotels were the most common accommodation type for those staying in Edinburgh while staying with friends and / or family was the most popular response amongst those visiting the Borders and Midlothian. Most respondents indicated they did not pay for accommodation with the proportion who did not pay being higher amongst those visiting the Scottish Borders and / or Midlothian than those visiting Edinburgh.

What activities are undertaken by tourists using the Borders Railway and how much do they spend on activities?

Figure 5.8 shows the activities undertaken by tourist day trippers and those making overnight stays during their trip. Overall, shopping was by far the most popular activity with 48% (n=273) of respondents who answered this question selecting this option. Shopping was the most commonly cited activity amongst those traveling to Edinburgh and the Scottish Borders / Midlothian albeit a slightly larger proportion of those going to Edinburgh selected this option. The dominance of shopping as an activity may in part be a result of the timing over which the surveys were undertaken and the proximity of the Christmas period.

Where respondents indicated that they visited a castle, museum, country park or heritage centre, they were also asked to provide the name of the attraction they visited. Amongst those visiting the Scottish Borders / Midlothian responses included Melrose Abbey and Hawick Museum while amongst respondents visiting Edinburgh responses included Edinburgh Castle, the Botantic Gardens, National Portrait Gallery, and National History Museum. A relatively large proportion of respondents selected 'other'. Amongst respondents visiting Edinburgh popular responses included visiting the Christmas Markets / Winter Wonderland; going to the Royal Yacht Britannia; and meeting friends whilst for the respondents visiting the Scottish Borders and/or Midlothian responses included visiting friends and rugby.
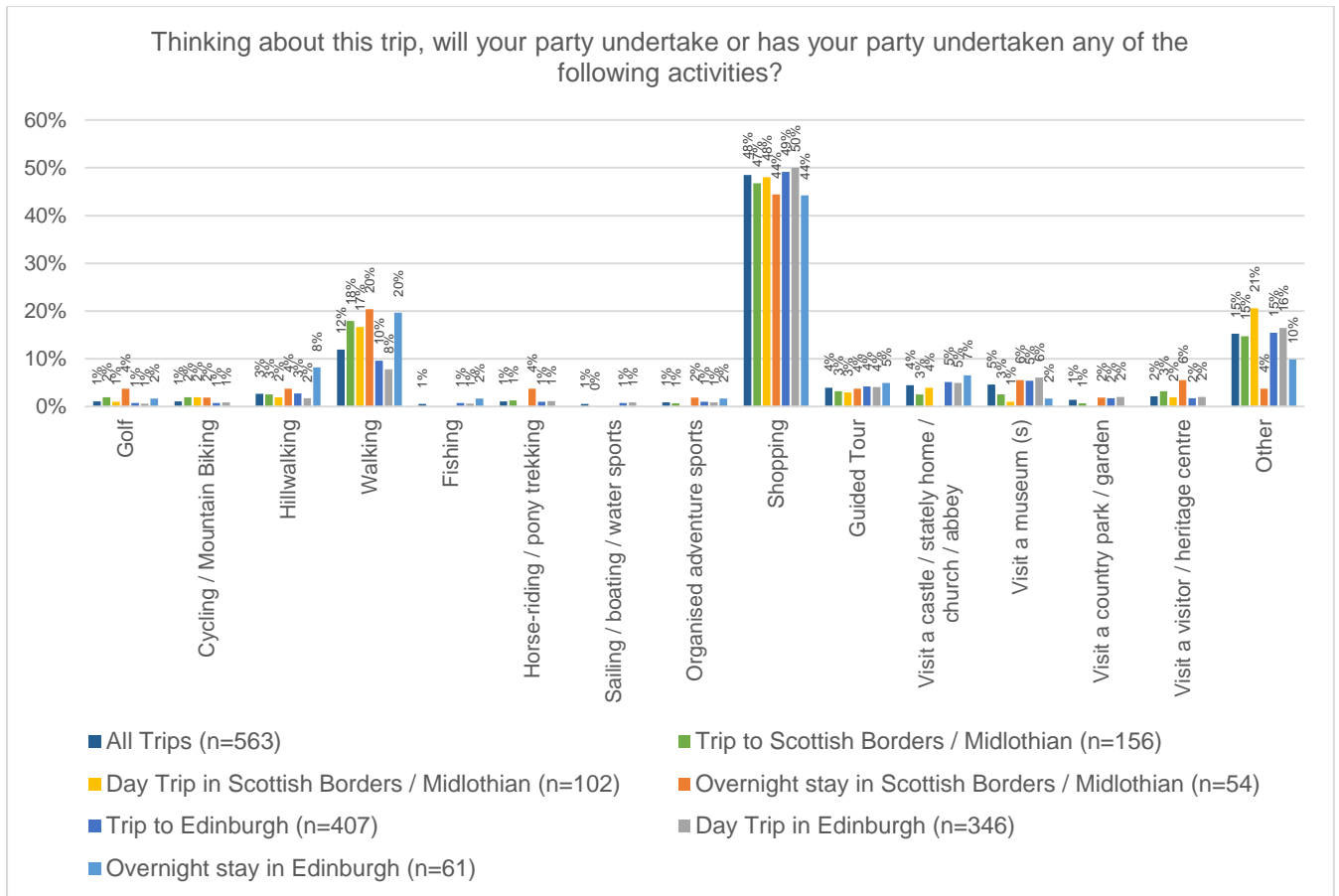
Figure 5.8: Activities undertaken by those making day trips or overnight trips to Edinburgh and Midlothian and / or the Scottish Borders

Figure 5.9 below shows the amount spent (excluding accommodation and the train fare) on the trip by those making day and overnight trips. As may be expected those making overnight stays spent more than day trippers and, as above, those taking a trip in Edinburgh tended to spend more than those taking a trip in the Scottish Borders / Midlothian.
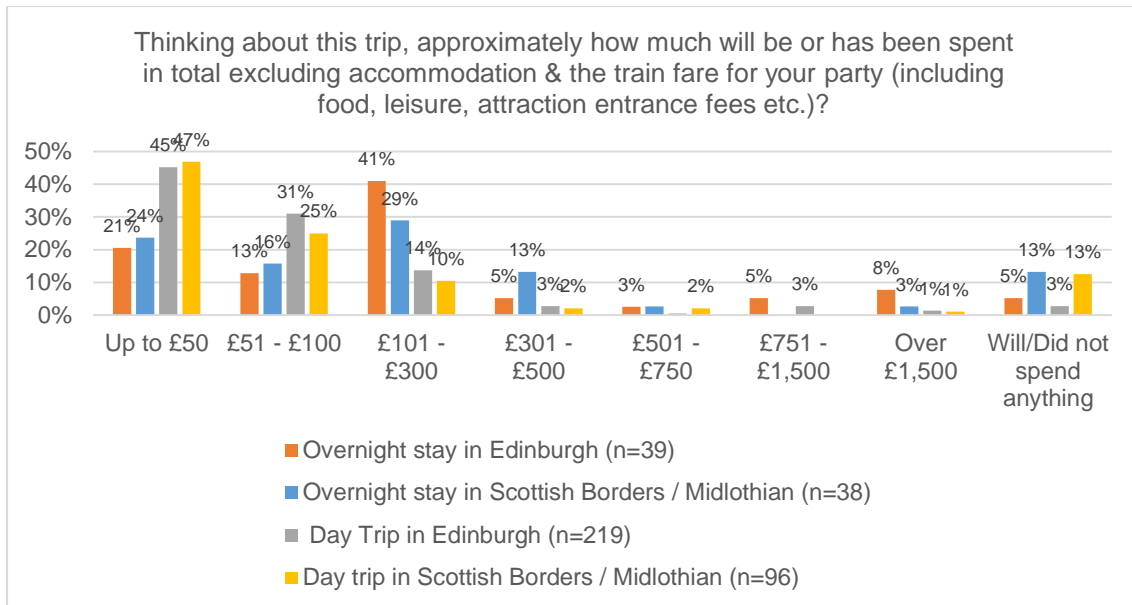
Figure 5.9: Approximate amount spent excluding accommodation and train fare by those making day and overnight trips by trip destination

Key Point:
Respondents undertook a range of activities during their trip with shopping the most commonly cited activity. In terms of specific attractions, amongst those visiting the Scottish Borders / Midlothian responses included Melrose Abbey and Hawick Museum while amongst respondents visiting Edinburgh responses included Edinburgh Castle, the Botanic Gardens, National Portrait Gallery, and National History Museum.

6 Service Quality and Barriers to Use

Overview

An additional aim of the research was to gather information on views of the Borders Railway service and examine barriers to use amongst one-off and non-users. This Chapter provides a summary of the key findings in this regard. The Chapter firstly discusses the results of an analysis of ScotRail's passenger count data to provide a context for subsequent comments on passenger capacity issues before discussing outputs from both the User and Non-User Survey.

Passenger Capacity

As discussed in Chapter 2, in the first year of the railway's operation there were a number of reports of passenger capacity constraints on the line. In order to establish an accurate picture of capacity issues, a detailed analysis of ScotRail passenger count data was undertaken. This data was collected during October - November 2016[8]. It is based upon multiple counts across multiple day parts on different days of the week and provides details of the maximum occupancy, number of seats and capacity utilisation across each service broken down by departure time and direction of travel. Figure 6.1 – Figure 6.3 below show the maximum seated capacity utilisation on each service for each day for which data was provided. A figure of more than 100% indicates that passengers are having to stand for at least part of their journey.
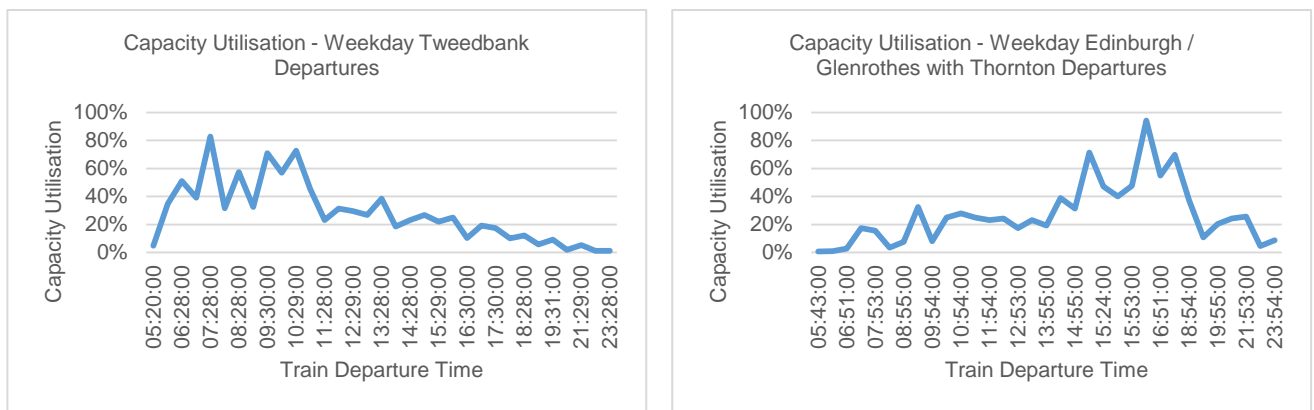
Figure 6.1: Capacity Utilisation – Weekday

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[8] Note that as of 12 December 2016, an additional 1,300 additional peak-time seats have been made available on the Borders line each week. Capacity has been doubled on the 07.58 train from Tweedbank to South Gyle and on the 16.52 train from Edinburgh Waverley to Tweedbank.
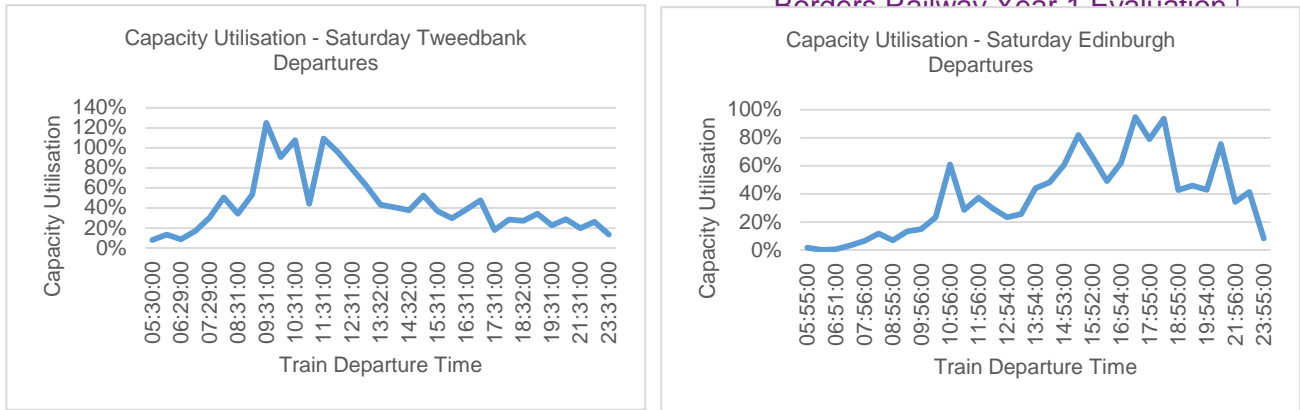
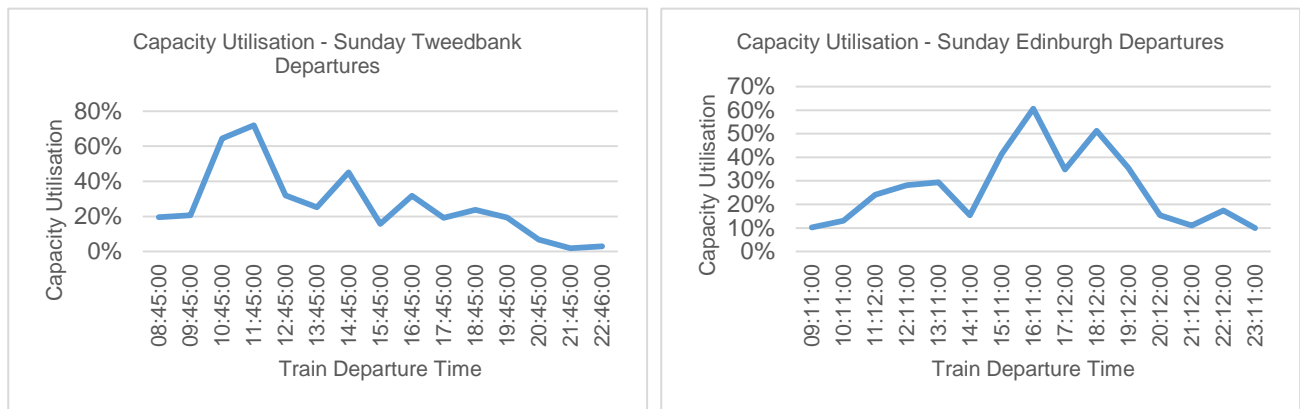Figure 6.2: Capacity Utilisation – Saturday

Figure 6.3: Capacity Utilisation Sunday

Overall, the data suggests that capacity is more problematic on Saturday services. On weekdays there were no services where capacity is above 100% and just one service in each direction for which capacity is above 80% (07:28 departure from Tweedbank – capacity utilisation 83% and 16:19 departure from Glenrothes with Thornton – capacity utilisation 94%).

However, on Saturdays there were three Tweedbank departures (the 09:31, 10:31, and 11:31) with capacity utilisation above 100% and a further two above 90% (10:01 and 12:01). Capacity utilisation is less problematic for Saturday trains departing Edinburgh with no trains above 100% and three above 80% (15:26 departure from Edinburgh – 82%, 17:23 departure from Edinburgh – 95% and 18:26 Edinburgh departure – 94%).

On Sunday, there are also trains for which capacity is above 100%, with the largest capacity utilisation being 72% (11:45 departure from Tweedbank).

Key Point:
Available passenger count data suggests that capacity is most problematic on Saturday services departing from Tweedbank.

Service Quality

Figure 6.4 shows the overall rating respondents to the User Survey provided for the quality of service on the Borders Railway broken down by the home location of respondents. As shown there was generally a high level of satisfaction with the quality of service, with 24% (n=252) of respondents overall rating the service as very good and a further 56% (n=579) rating the service as good. The quality ratings were highest amongst the more infrequent users (i.e. those based overseas and elsewhere in Scotland the UK).
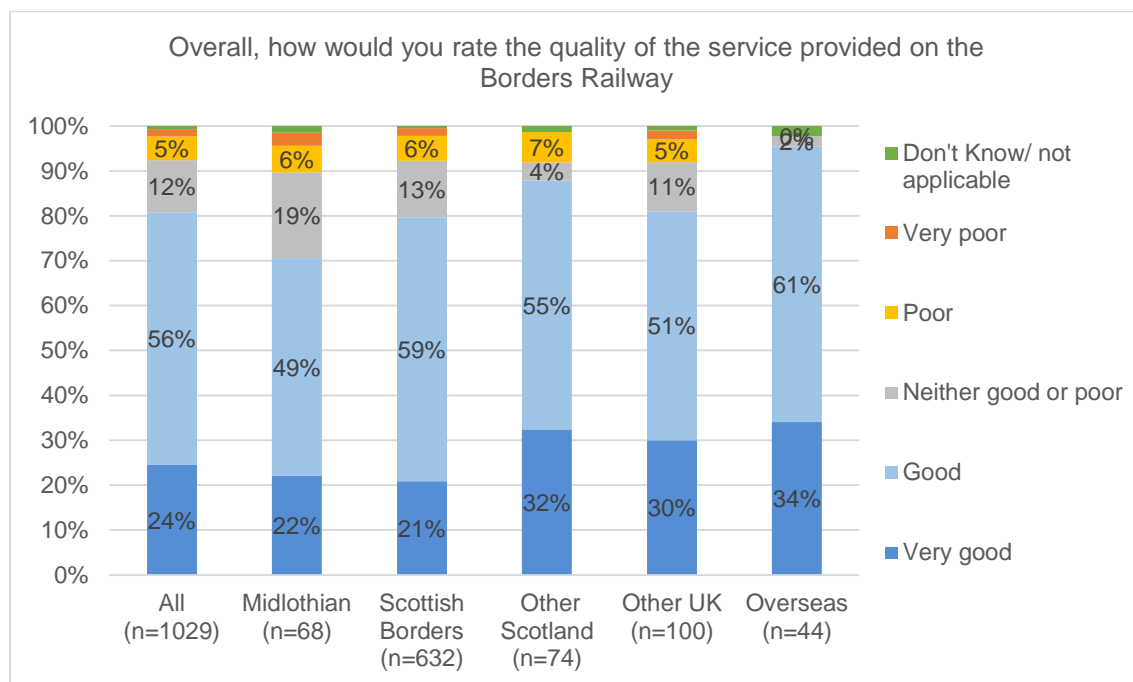
Figure 6.4: Quality of Service on the Borders Railway

Figure 6.5 shows the net satisfaction with various aspects of service on the Borders Railway.

Thinking about your use of the Borders Railway, how satisfied are you with the following?
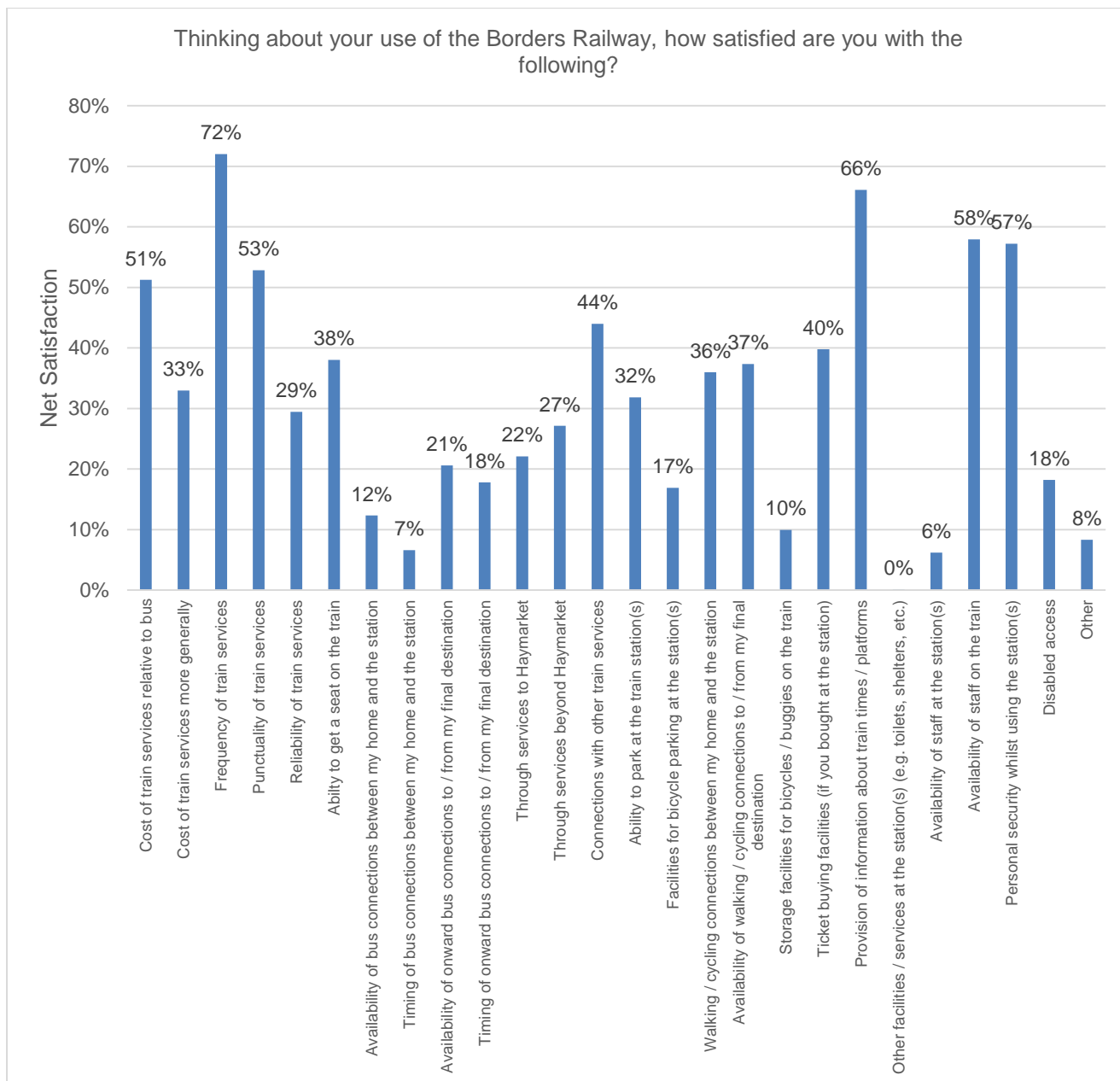
Figure 6.5: Net Satisfaction with aspects of service on the Borders Railway

Overall, respondents reported a high degree of satisfaction, although they were least satisfied with '*other facilities / services at the station(s)*' (with which 38% of respondents were satisfied and 38% were dissatisfied) and '*the availability of staff at the station(s)*' (with which 33% were satisfied and 27% were dissatisfied) – both of these likely reflect the fact that all Borders stations are unstaffed without toilet facilities (except for the Interchange at Galashiels). It is however noted that since this fieldwork was undertaken, a new customer hub, offering locally-produced refreshments as well as accessible toilet facilities, has opened at Tweedbank station.

Net satisfaction was also low for the '*timing of bus connections between my home and the station*' (with which 25% were satisfied and 18% were dissatisfied) and '*the*

availability of bus connections between my home and the station' (with which 31% were satisfied and 18% were dissatisfied).

In terms of *capacity* and *reliability* (both of which were reported as key issues in the first year of operation), while the majority of users were satisfied, approximately a quarter of respondents in each case were dissatisfied. Taking the sample as a whole, 62% (n=636) were satisfied with their ability to get a seat compared to 24% (n=243) who were dissatisfied while 55% (n=562) were satisfied with the reliability of the service compared to 25% (n=259) who were dissatisfied.

Figure 6.6 shows the net satisfaction with these aspects of service broken down by the departure time of the journey respondents were undertaking when surveyed i.e. AM is defined as 0700-1000, inter peak (IP) is defined as 1000-1600 and PM is defined as 1600-1800.

As shown net satisfaction with regard to getting a seat is lower amongst those travelling at the weekend. This accords with the ScotRail passenger count data discussed above which indicated that capacity was more of an issue on weekend services. In contrast reliability was more of an issue amongst those whose current journey was on a weekday in the PM.
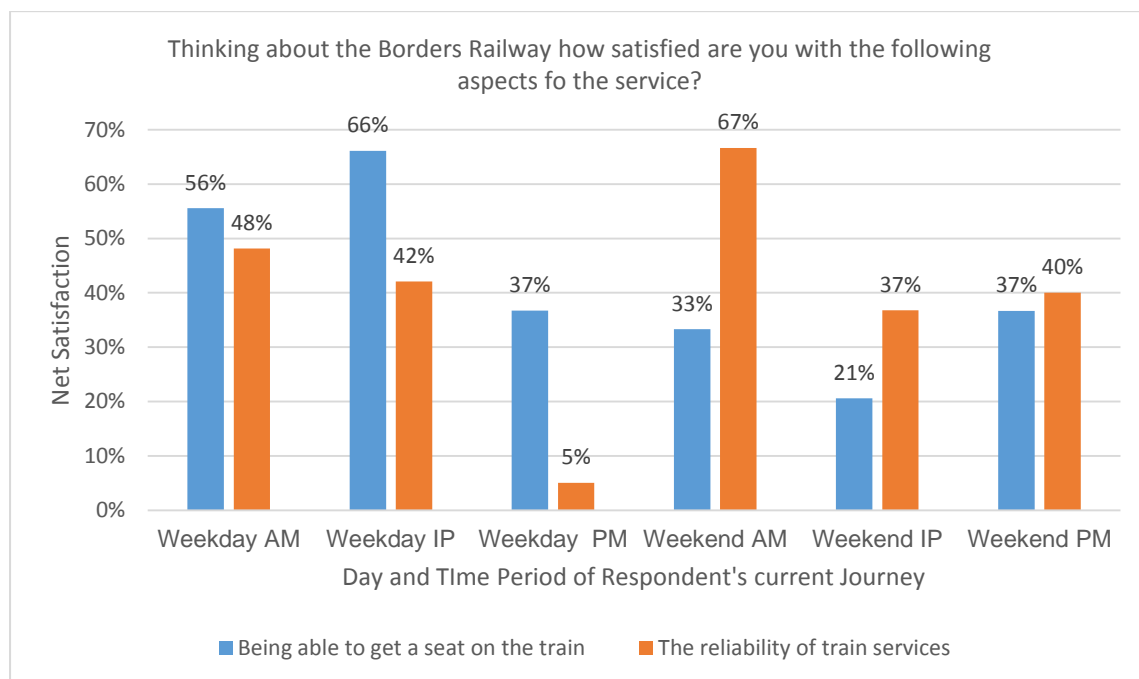

Figure 6.6: Respondent satisfaction with being able to get a seat and the reliability of the service by time period of current journey

Impact of Service on Investment Objectives

Respondents to the User Survey were also asked to rate the impact of the Borders Railway against a number of criteria. Figure 6.7 below shows the net agreement (proportion of respondents who agree with the statement minus proportion of

respondents who disagree) for the sample as a whole and for respondents from Midlothian and Scottish Borders. This figure clearly demonstrates the positive perception of the Borders Railway amongst respondents. Overall, '*promoting access to / from the Scottish Borders and Midlothian to Edinburgh*' scored the highest with a net agreement of 92% for the sample as a whole and 91% for those from Midlothian and the Scottish Borders respectively.
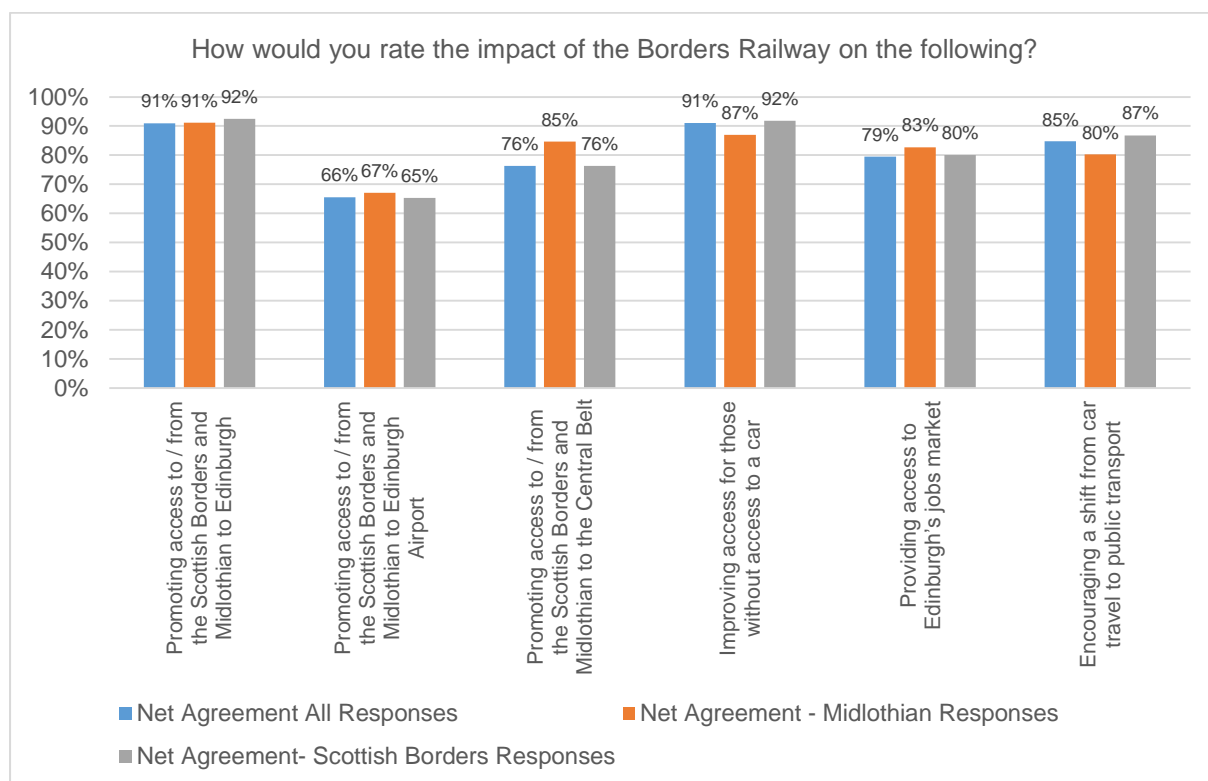

Figure 6.7: Impact of Borders Railway – Net Agreement

Key Point:
There was generally a high level of satisfaction with the quality of service, with 80% of respondents to the User Survey rating the service as very good or good. Overall, respondents were least satisfied with facilities / services at the station(s) and the availability of staff at the station(s).
Net satisfaction was also low with regard to the timing and availability of bus connections to / from the stations.
In terms of reliability and capacity 62% were satisfied with their ability to get a seat while 55% were satisfied with the reliability of the service.
There was a positive perception of the Borders Railway amongst respondents in terms of performance against its objectives with more than 90% agreeing that railway had promoting access to / from the Scottish Borders and Midlothian to Edinburgh.

Why are people who could use the Borders Railway not using the service?

The one-off and non-users of the service who responded to the Non User Survey were asked why they didn't use the service or why they didn't use the service more frequently. Overall, the most popular response was the '*car is more convenient*' with 80% (n=150) of respondents citing this as a reason for their limited use (see Figure 6.8). Other common responses included, '*the lower cost of bus services*' (47%, n=107), '*the greater convenience provided by bus options*' (39%, n=89) and '*the ability to use the National Entitlement Card on buses*' (30%, n=67). In total, 20% cited the reliability of the service as a reason for their limited use with a similar proportion selecting '*difficulty getting a seat the train*' (18%) and '*difficulty getting on the train*' (17%).

When broken down by geography it is notable that the bus is more of a draw amongst residents from Midlothian. Overall, 55% (n=93) of Midlothian respondents selected the '*bus is cheaper*' compared to just 24% (n=14) of the Scottish Borders sample. In addition, a larger proportion of Midlothian residents (45%, n=77) felt that the bus was more convenient than the train (compared to just 21% for those from the Scottish Borders study area) and 34% selected the ability to use the National Entitlement Card on the bus (compared to 19% from the Scottish Borders study area). The more positive outlook with regard to buses amongst Midlothian respondents may in part be a result of the availability of the Lothian Bus £1.60 flat fare between Edinburgh and Midlothian (which makes the bus far cheaper than the equivalent rail fare of £5.40) and could partly account for the lower than predicted use of Borders Railway service amongst Midlothian residents.

Both the reliability and (perhaps surprisingly) the capacity of the service were bigger concerns amongst those from the Scottish Borders than Midlothian. In total, 24% of Borders residents selected '*too difficult to get a seat*' and '*too difficult to get on the train*' compared to 16% and 14% respectively of Midlothian residents. Interestingly, the proportion of one-off users selecting these options was higher than that of the non-users, particularly amongst residents of the Scottish Borders (see Table 6.1) suggesting that some one-off users may have been put off by these issues.

Table 6.1: Proportion of respondents citing difficulty getting a seat / getting on the train as a reason for their non or limited use

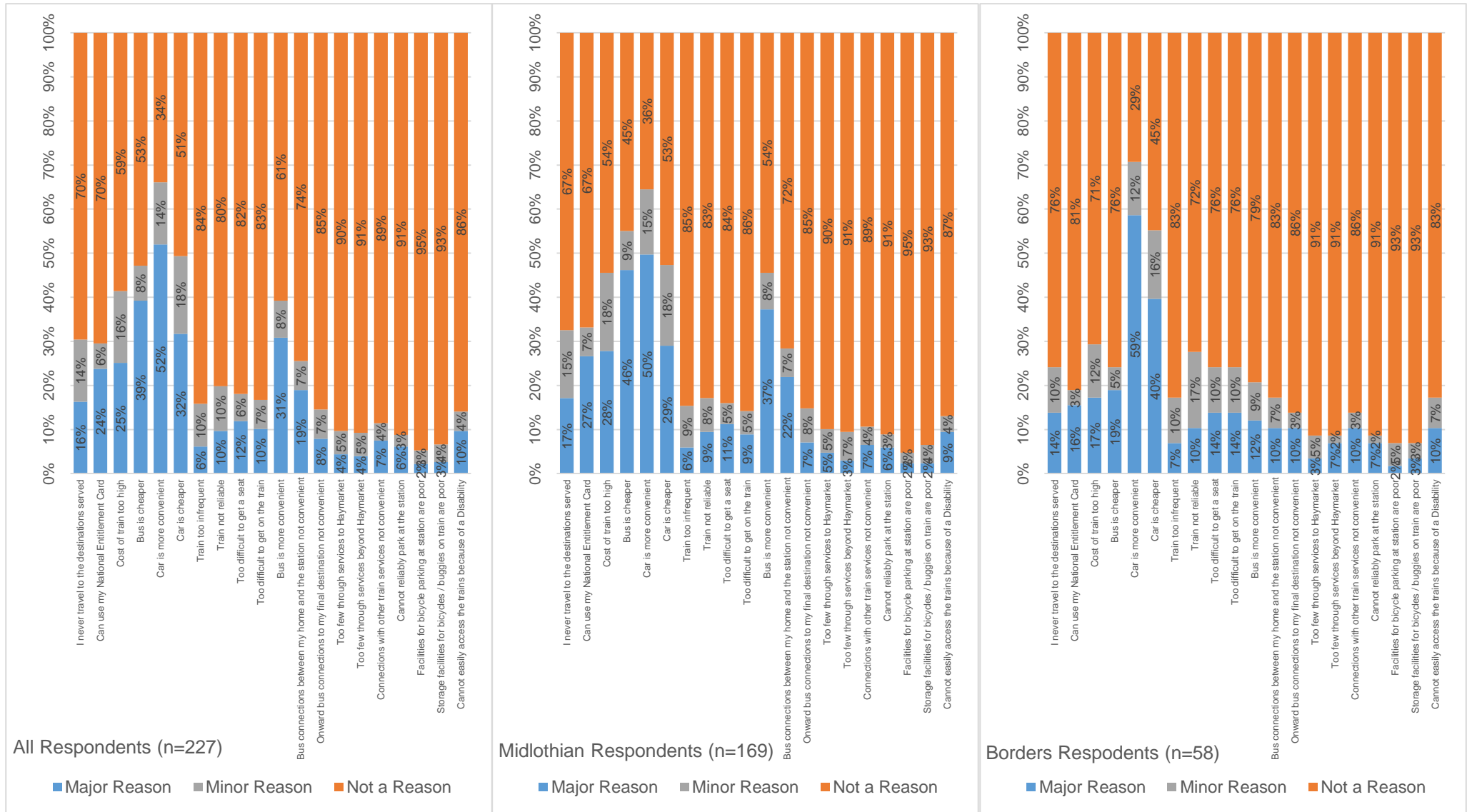|	Respondent	Scottish Borders	Midlothian
I think it is too difficult to get a seat	One-off User	39%	21%
	Non-user	14%	14%
	All respondents	24%	14%
I think it is difficult to get on the train at the time I want to travel due to capacity issues	One-off User	30%	19%
	Non-user	20%	12%
	All respondents	24%	16%

Figure 6.8: Reasons for not using the Borders Railway / using the service more frequently by geography

Key Point:
The majority (80%) of non-users / one-off users said that they didn't use the service more frequently because the car was more convenient. Other popular responses included, the lower cost of bus services (47%), the greater convenience provided by bus options (39%) and the ability to use the National Entitlement Card on buses (30%).

The alternative offered by bus options was more of a draw amongst residents from Midlothian which may in part be a result of the availability of the Lothian Bus flat fare in this area making bus far cheaper than rail.

In total, 20% cited the reliability of the service as a reason for their limited use of the service, 18% and 17% respectively selected 'difficulty getting a seat the train' and 'difficulty getting on the train'. Both the reliability and (perhaps surprisingly) the capacity of the service were bigger concerns amongst those from the Scottish Borders than Midlothian.

What would encourage non-users / one-off users to make use of the railway / use the railway more frequently?

In total, 37% (n=84) of respondents to the Non-User Survey stated that improvements to the Borders Railway would encourage them to use the service, with proportions slightly higher amongst residents of the Scottish Borders study area (45%) compared to Midlothian (34%). Figure 6.9 provides a breakdown of the factors which respondents said would encourage them to use the service. The most popular response was '*lower train fares*' with 70% (n=59) of respondents stating that this would be highly likely or likely to encourage them to use the railway. The second and third most popular responses were '*Improved reliability*' and '*the ability to reliably get on the train*', with 62% (n=52) and 57% (n=48) respectively selecting these options, highlighting the importance of these aspects of service amongst non-users.
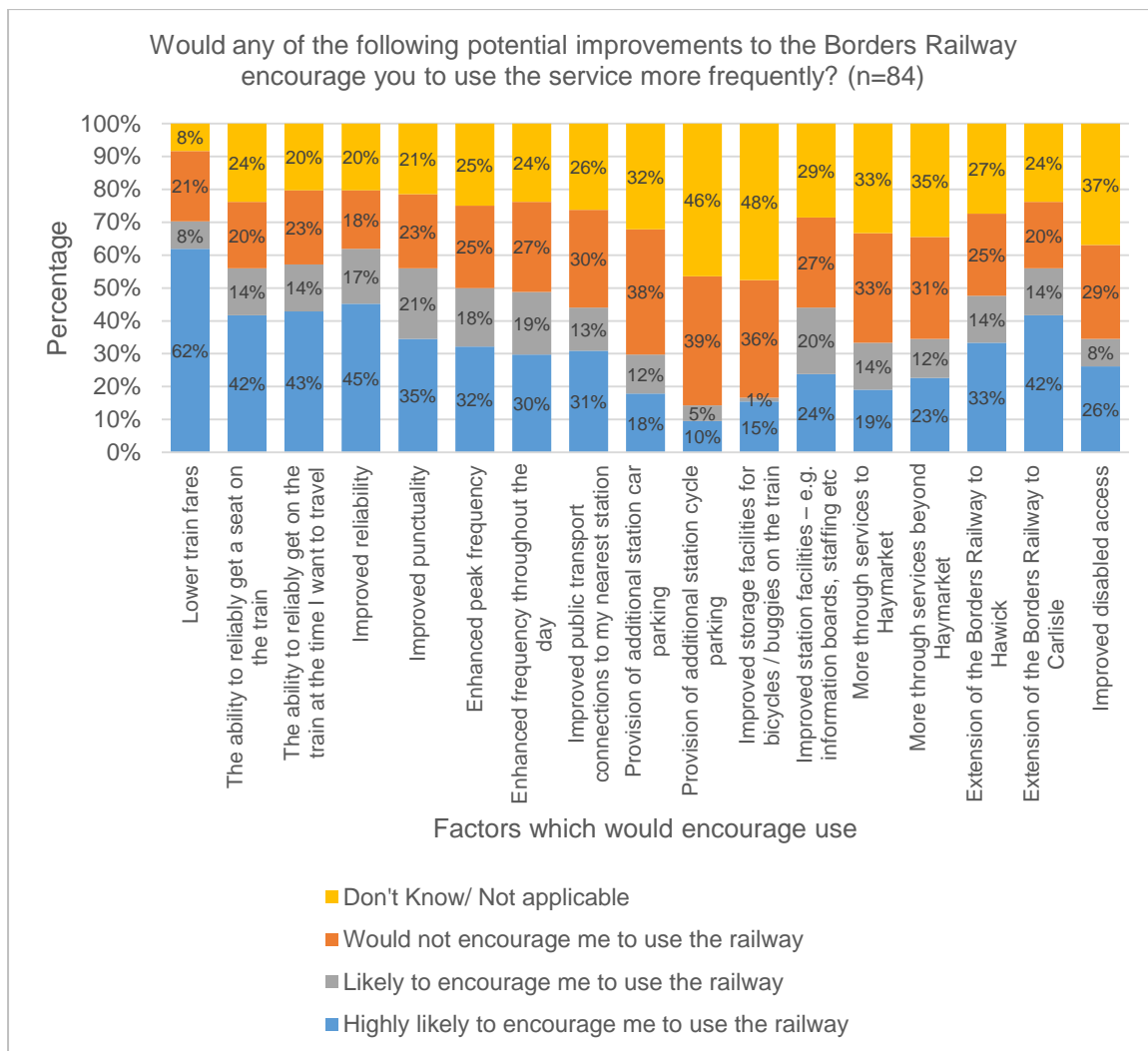
Figure 6.9: Factors which would encourage use of the Borders Railway (all respondents)

When the results are broken down by geography there were slight differences in the responses. For residents of the Midlothian study area, the most popular improvement was '*lower train fares*' with 76% (n=44) of respondents stating that this would encourage them to use the service. This was followed by '*improved reliability*' (64%, n=37) and '*the ability to reliably get on the train at the time I want to travel*' (58%, n=34). Large proportions also selected '*improved punctuality*' (58%, n=34) and '*the ability to reliably get a seat on the train*' (57%, n=34). Amongst residents from the Scottish Borders study area, the most popular improvement was '*an extension of the Borders Railway to Carlisle*' with 70% (n=18) of respondents selecting this option. This was followed by '*an extension of the Borders Railway to Hawick*' (65%, n=17) and '*lower train fares*' (58%, n=15). As with respondents from Midlothian, a large proportion of Scottish Borders respondents selected '*the ability to reliably get a seat on the train*' (54%, n=14), '*the ability to reliably get on the train at the time I want to travel*' (54%, n=14), '*improved reliability*' (57%, n=15) and '*improved punctuality*' (50%, n=13) as an issue of importance to them.

Key Point:

In total, 37% of respondents to the Non-User Survey stated that improvements to the Borders Railway would encourage them to use the service with the most popular response for the sample as a whole being lower train fares, followed by improved reliability and being able to get a seat on the train.

In contrast to the sample as a whole and that of Midlothian respondents, amongst residents from the Scottish Borders, the most popular improvement was 'an extension of the Borders Railway to Carlisle' followed by 'an extension of the Borders Railway to Hawick'.

Appendix A

<u>User Survey Sample Characteristics</u>

Overall, 37% (n=376) of respondents to the User Survey were male and 62% (n=639) were female, with 1% (n=10) choosing not to say. As shown in Figure A.1, the majority (22%, n=226) were aged 55-59.
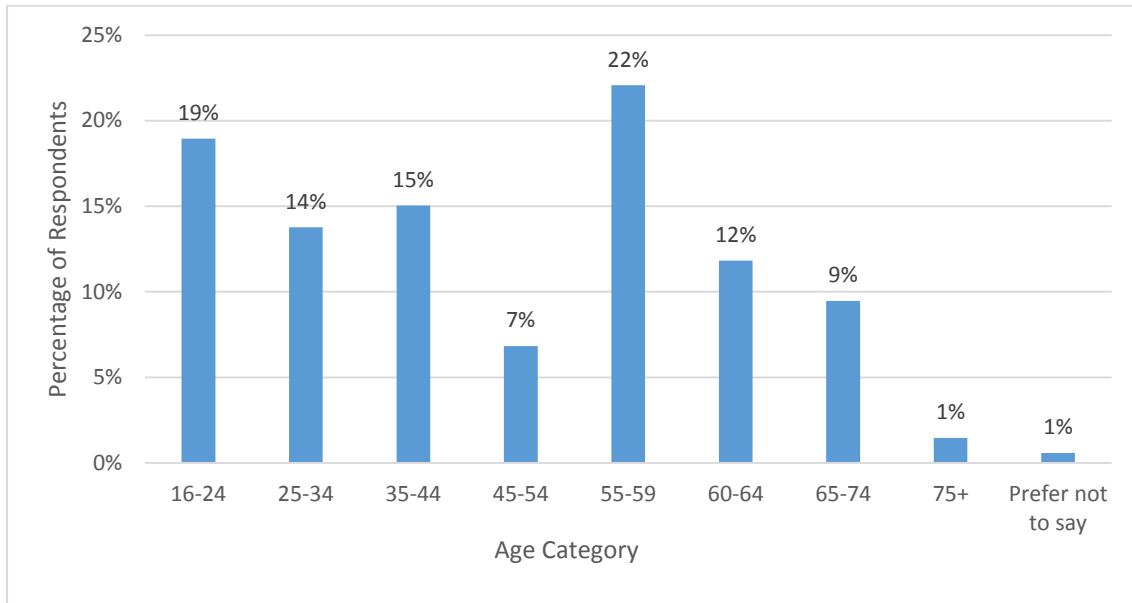
Figure A.1: Breakdown of Responses by Age Category (n=1024)

Figure A.2 shows the employment category of respondents. Of the 1,014 respondents who answered this question, 43% (n=437) were in full time employment, with a further 17% (n=172) working part time and 2% (n=16) self-employed. As shown in the figure below, the sample included a relatively high proportion of retired individuals (20%, n=204).
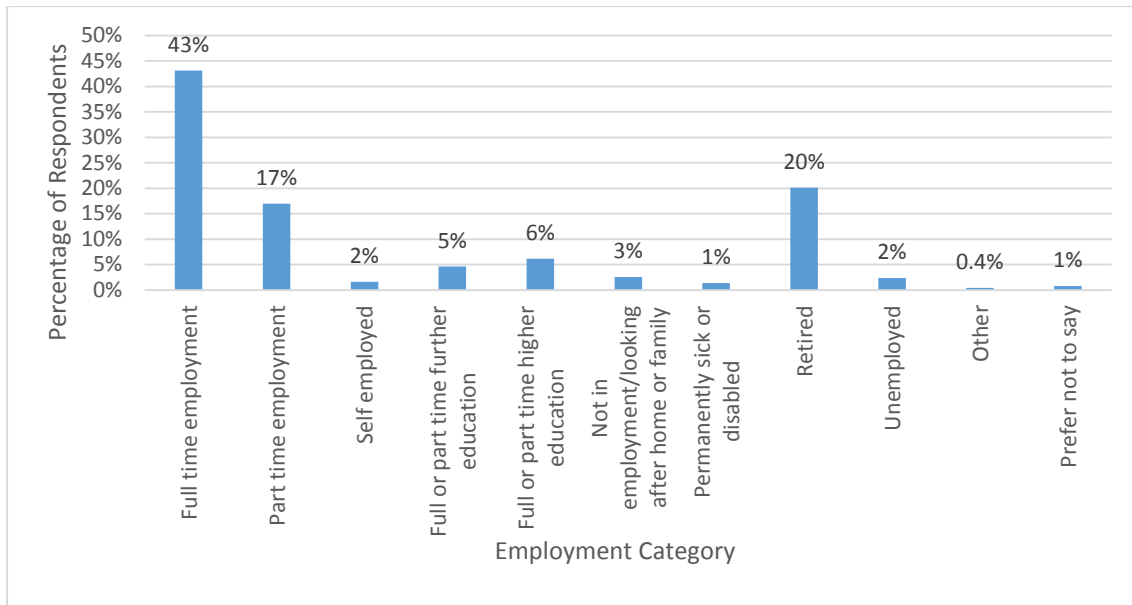
Figure A.2: Employment Category of Respondents (n=1014)

Figure A.3 shows the annual household income of respondents. Of those who responded to this question (n=969), the largest proportion (13%) had incomes of between £20,000 and £30,000 per annum.
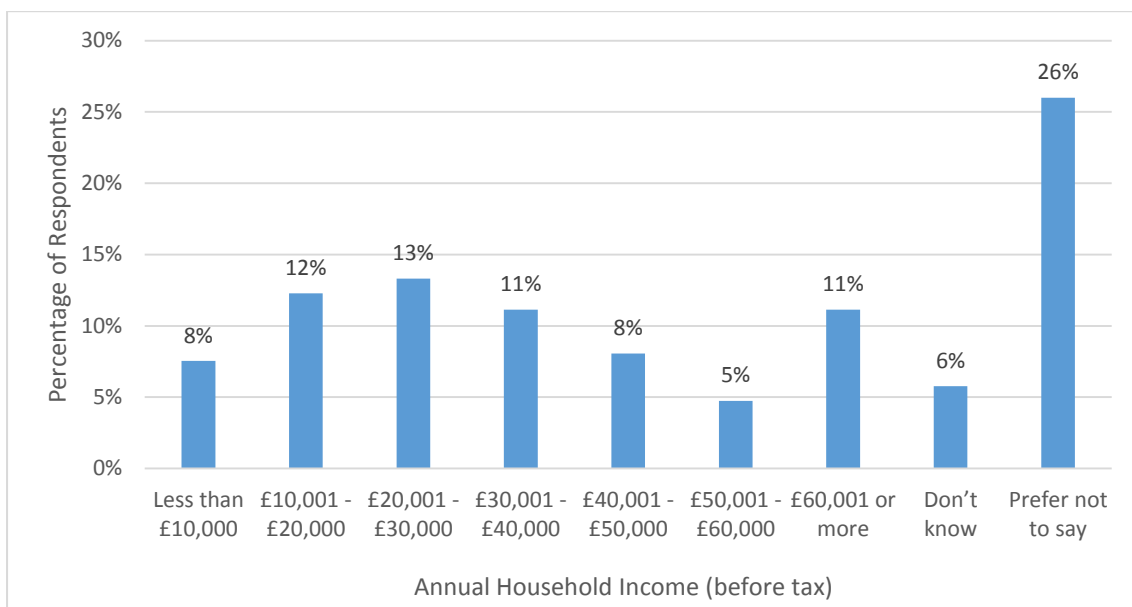

Figure A.3: Annual Household Income (before tax) of Respondents (n=969)

Respondents were also asked whether they had a disability or long-term illness and whether they held a National Entitlement Card (NEC). Overall, 8% (n=76) had a disability and 28% (n=274) held a NEC.

Appendix B

Table B.1: Conversion factors used to generate annual return trips based on trip frequency provided by respondent

Trip Frequency provided by respondent	Conversion to Annual Return Trips	Conversion to Annual Return Trips
More than 7 times per week	8*47	8*47*2
7 times per week	7*47	7*47*2
6 times per week	6*47	6*47*2
5 times per week	5*47	5*47*2
4 times per week	4*47	4*47*2
3 times per week	3*47	3*47*2
2 times per week	2*47	2*47*2
1 time per week	1*47	1*47*2
3 times per month	3*12	3*12*2
2 times per month	2*12	2*12*2
Once a month	1*12	1*12*2
Less than once a month	0.5*12	0.5*12*2
First time on this service	0	0

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