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Borders Railway Year 2 Evaluation

Survey of users and non-users

February 2018

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Transport Research Summary

The Borders Railway re-opened in September 2015. In line with Scottish Transport Appraisal Guidance (STAG) and Transport Scotland's Guidance on the Evaluation of Rail Projects, Transport Scotland completed a Stage 1 Evaluation of the Railway in November 2016. This research aims to build on the findings of the Stage 1 Evaluation and further develop understanding of the extent to which the Borders Railway is on track to meet its investment objectives. In addition, the study aims to capture the views and experiences of tourists using the railway. While the views of tourists were captured in the Year 1 Study, it was recognised that, due to the time at which the surveys were undertaken, the results are likely to underestimate the true tourism impact. A key aim of this study is therefore to record visitor numbers during the summer peak and, in so doing, provide greater clarity on the overall tourism impact of the new line. As with the Stage 1 Study, the research involved:

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

In addition, a series of consultations were completed with bus operators / local councils in the Borders and Midlothian to help develop a understanding of the impacts of the Borders Railway on bus services. 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.

Main Findings

- In Year 2, overall travel on the line has increased by 9.5%. As in Year 1, the majority of patronage on the line is towards Edinburgh with Tweedbank accounting for the biggest component of demand and Edinburgh Waverley the most frequent destination.
- Compared to Year 1, has been an increase in inbound and outbound travel at all the Midlothian stations while the number of people travelling to Galashiels and Tweedbank has fallen with the latter likely a reflection of the novelty impact of the line.
- Based on the frequency with which respondents indicated they made their current trip, it is estimated that approximately 35,900 (35%) of the estimated annual single trips recorded via the sample were 'new trips'.

- In terms of tourists, 71% said that the re-opening of the line had been a factor in choosing to make their trip and 25% stated that they would not have made the trip had the line not been in place.
- Commuting is the most common journey purpose. In comparison to the Year 1 Survey, there is a higher proportion of commuting and leisure trips and a smaller proportion of educational trips. In total, 60% of respondents to the User Survey reported that the purpose of their trip was either a tourist day trip or an overnight stay. Of these, 25% were travelling to Midlothian and / or the Scottish Borders.
- The re-opening of the Borders Railway has resulted in significant modal shift from the car to public transport with 61% of respondents stating that they previously made their journey by another mode. Of these, 64% reported that they previously drove all their way to their destination resulting in approximately 35,800 saved single car trips.
- There has also been a shift from bus to rail with 25% of those who formerly travelled by another method reporting that they took the bus, equating to a reduction in approximately 14,100 annual single trips.
- While the re-opening of the railway has resulted in improvements in access between stations, there have been changes in the bus network which are likely to have led to declines in accessibility at some locations. Most notable amongst these declines is the reduction in frequency of the X95 Service which is likely to have led to a reduction in access for areas on the A7 served by this bus which are not directly served by the Borders Railway.
- The data indicates that the Borders Railway has influenced people's residential and workplace choices with nearly 17% stating that they had moved house since the re-opening of the line of which 58% stated that the re-opening of the Borders Railway was a factor in their decision. The proportion who stated that the line had been a factor in their decision to move was slightly higher in Year 2 compared to Year 1 although the difference is marginal. Of those who had moved house, 29% stated that they would not have moved to their current address in the absence of the railway, a similar figure to that seen in Year 1.
- There is evidence that the Borders Railway has had an impact on people's choice of workplace with 52% of those who had moved employment stating that the re-opening of the line had been a factor in their decision.
- Generally, there was a high level of satisfaction with 95% of respondents rating the quality of service as *Very Good* or *Good*. Users were least satisfied with *Other* aspects of service such as the on-board facilities (toilets, Wi-Fi) as well as *Storage facilities for bicycles / buggies on the train*.
- The greater convenience offered by the car was the most popular reason amongst one-off, non- and irregular users for not using the service / not using the service more frequently. In Midlothian, the bus was highlighted as a greater draw than in the Scottish Borders with 51% finding the bus cheaper than the train and 40% finding it more convenient.
- Overall, 40% of one-off, non- and irregular users said that improvements to the Borders Railway would encourage them to use the railway / use it more frequently, with *'lower train fares'* being the most popular improvement.

Executive Summary

Aims of the Research

The aim of this research was to complete a repeat of the Stage 1 Evaluation two years after the re-opening of the Borders Railway. As with the Stage 1 Evaluation this research 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 scheme¹, 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

In addition to exploring the above, the research also sought to explore views of the service and barriers to use amongst one-off and non-users and examine the impact of the line on visitor numbers during the summer peak and, in so doing, provide greater clarity on the overall tourism impact of the new line.

Methodological Approach

To inform the research a primary data collection exercise was completed comprising:

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

In addition, a series of consultations were carried out with bus operators / local councils in the Borders and Midlothian to help develop understanding of the impacts of the Borders Railway on bus services.

In total, 825 responses were received to the User Survey and 250 responses were received to the Non-User Survey. While the response numbers were lower than achieved at the Year 1 stage, this was to be expected given that the survey period was shorter. Summing the number of journeys made by respondents to the User

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

Survey over a year equates to over 102,000 single trips – approximately 7% of the passenger journeys recorded during the first full year of opening.

Key Findings

Investment Objectives

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

Investment Objective 1: Promote accessibility to and from the Scottish Borders and Midlothian to Edinburgh and the central belt

The results of the research suggest that the Borders Railway is achieving Investment Objective 1. There are large volumes of users using the service to travel between the Scottish Borders / Midlothian and Edinburgh, with total patronage on the line increasing by 9.5% since Year 1. As may be expected, the majority of patronage is towards Edinburgh with Tweedbank the most frequent origin and Edinburgh Waverley the most frequent destination. Since Year 1, inbound and outbound travel at all the Midlothian stations has increased while the number of people travelling to Galashiels and Tweedbank has fallen slightly, with the latter likely a reflection of the novelty impact of the line wearing off. While commuting is the most common journey purpose, there are also a significant number of leisure and tourist users and evidence that the line has improved access to opportunities and encouraged people to make additional / new trips which they previously did not make, with approximately 35,900 of the estimated annual single trips recorded via the Year 2 sample falling into this category.

Investment Objective 2: Foster social inclusion by improving services for those without access to a car

The results of the research suggest that the Borders Railway is largely achieving Investment Objective 2. The re-opening of the Borders Railway has provided those without a car the means to access the stations along the corridor more quickly and there was strong agreement amongst respondents to the user survey that the railway has enabled them to access opportunities without using the car / only using the car for a portion of the journey. However, while the re-opening of the railway has resulted in improvements in access between the stations, it has also resulted in changes in bus service provision within the study area, most notably the reduction of the X95 service to an hourly service in May 2016. This change is likely to have led to a slight reduction in public transport access for areas on the A7 served by this route which are not directly served by the Borders Railway, including for example, Herriot and Fountainhall. Feedback from the consultations suggests that the impact on bus services generally has been more keenly felt within the Scottish Borders with the decline in both patronage and revenue on the XA95 ultimately resulting in First discontinuing their operations within the county in 2016. However, since taking over from First, Borders Buses has introduced no further changes to bus service provision

and has made significant investments in the network. The impact of the railway on public transport and the opportunities the line provides for those without access to a car will continue to be monitored.

Investment Objective 3: Prevent decline in the Borders population by securing ready access to Edinburgh's labour market

The results of the research suggest that the Borders Railway is achieving Objective 3. As discussed above, commuting is the most common journey purpose and Edinburgh is the most frequent destination, suggesting that the line has secured access to employment opportunities in the capital for residents of the Scottish Borders and Midlothian. The results also suggest that the improved access opportunities associated with the rail line have influenced people's residential choices and encouraged in-migration to both Midlothian and the Scottish Borders. There is evidence that the Borders Railway has had an impact on people's choice of workplace with nearly a fifth of those who moved employment stating that the re-opening of the line had been the main factor in their decision. Overall, the impact on the number of house worked is small.

Investment Objective 4: Create modal shift from the car to public transport

The results of the research suggest that the Borders Railway is achieving Objective 4. The responses to the User Survey suggest that there has been a significant modal shift from car to rail, with the majority of respondents (64%) who previously made their trip by another mode stating that they drove all the way to their destination equating to an estimated 36,000 saved annual single car trips from the sample alone. 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 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. While slightly outside of the scope of the objective, it is also worth noting that as well as generating modal shift from car to rail, there has also been a shift from bus to rail with 25% of the sample stating that they previously made their current journey by bus equating to an estimated 14,100 trips.

Other Key Findings

Visitor Trips

A summary of the key findings with respect to visitor trips is provided below:

- 60% of respondents to the user survey indicated the purpose of their trip was either a day or overnight trip, accounting for 30% of annual trips recorded by the sample. Whilst the majority of visitor trips were Edinburgh bound, there were also a considerable number of trips made to the Scottish Borders.
- The majority (89%) of visitors came from Scotland with the largest proportion from the Scottish Borders. There were also smaller numbers of visitors from elsewhere in the UK as well as the USA and a number of other overseas countries.

- The re-opening of the Borders Railway was a relatively important factor in people's decision to make tourism trips with 70% of tourist users stating that it was a factor in their decision to make their trip and 25% stating that they wouldn't have made their trip were it not for the rail line. These figures are slightly higher than the equivalent Year 1 figures (65% and 23% respectively).
- Staying with friends and / or family was the most common accommodation type amongst visitors to both Edinburgh and Midlothian / the Scottish Borders with a slightly higher proportion of visitors to the latter choosing this option. 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.
- Respondents undertook a range of activities during their trip with shopping the most commonly cited activity. In terms of specific attraction, amongst those visiting the Scottish Borders / Midlothian, responses included Abbotsford House and Melrose Abbey whilst amongst respondents visiting Edinburgh responses included Edinburgh Castle, the Botanic Gardens and Holyrood Palace.

Service Quality and Barriers to Use

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

- Satisfaction with the quality of service was higher amongst respondents to the Year 2 survey with 95% of Year 2 respondents rating the service as very good or good compared to 80% of respondents to the Year 1 Survey.
- Satisfaction was relatively low with storage facilities for bicycles and buggies on-board the trains and the timing and availability of bus connections between home location and the station. Overall, 63% were satisfied with the reliability of the service whilst 64% were satisfied with their ability to find a seat on the train, higher than the equivalent figures for the Year 1 Survey.
- There was a positive perception of the Borders Railway amongst respondents in terms of performance against its objectives with more than 90% agreeing that the railway had promoted access to / from the Scottish Borders and Midlothian to Edinburgh as well as improving access for those without access to a car.
- The majority of non-users, one-off users and irregular users (72%) stated that they did not use the service more frequently as the car was more convenient. Other common responses included the lower cost of bus services (46%), the greater convenience provided by the bus (43%), the cost of train fares (38%) and the inconvenience of bus connections (31%).
- As was the case during the Year 1 Survey, bus options were more of a draw amongst Midlothian residents compared to those in the Scottish Borders with a higher proportion of Midlothian residents selecting 'the bus is cheaper', 'the bus is more convenient' and 'I can use my National Entitlement Card (which provides free bus travel) on the bus' as reasons for their limited use of the rail service. This is likely to be a result of the availability of the flat fares and the more developed bus network in this area.

- In total, 40% 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 being 'lower train fares'. Whilst those in the Scottish Borders also cited 'lower train fares' as the most likely to encourage greater use, the most popular response in Midlothian was 'the ability to reliably get a seat on the train'.

1 Introduction

Overview

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

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

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

In addition, a consultation exercise was carried out with a number of key stakeholders drawn from the bus industry in order to further develop understanding of the impact of the railway on tourism and bus services. The purpose of this report is to 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 research methodology and provides a summary of the achieved responses 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; and
- **Chapter 6:** discusses passenger views on the service and the barriers to use amongst non-users, one-off users and irregular users of the railway.

2 Background

Overview

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, Newcraighall and Edinburgh) is provided in Figure 2.1.

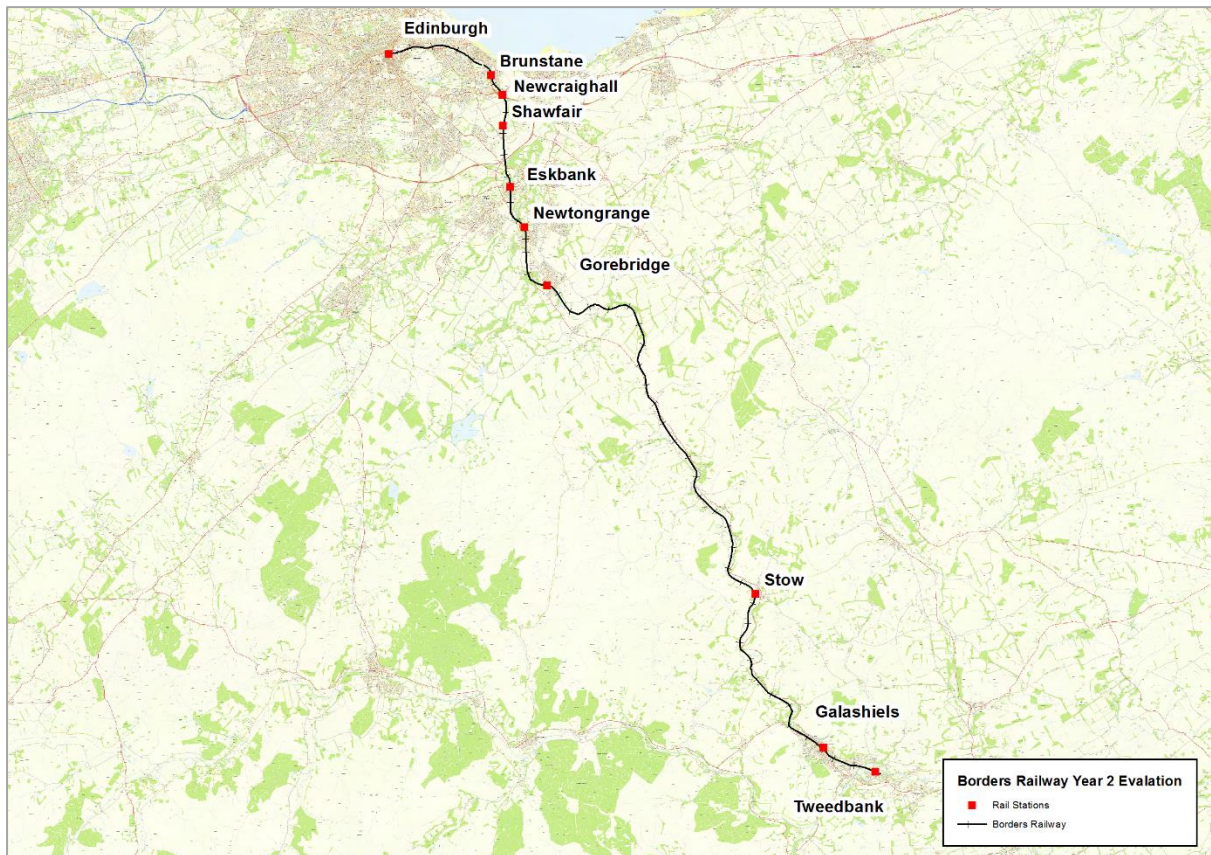


Figure 2.1: Map of the Borders Railway

The Business Case

The Final Business Case (FBC) for the Borders Railway, 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; and
- the National Transport Strategy's objectives, by improving integration, promoting regional cohesion/social inclusion and by helping to promote economic growth.

The document outlines four Investment Objectives for the line as shown in the table below.

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

Borders Railway Year 1 Evaluation

In line with STAG and the Guidance on the Evaluation of Rail Projects, a Year 1 Evaluation of the re-opening of the Borders Railway was completed in September 2016. This aimed to provide a high-level assessment of the extent to which the Borders Railway was on track to meet its Investment Objectives as well as examining views of the service. The research consisted of:

- An on-train survey of users of the Borders Railway which collected information on travel behaviour pre- and post-opening, as well as opinions on the quality of the service;
- A telephone survey of non- and one-off users of the Borders Railway which collected information on current travel behaviours and the perceived barriers to using the service;
- A series of secondary data analysis tasks including a review of LENNON ticket sales and ScotRail passenger count data; and
- A public transport frequency analysis using TRACC accessibility software which aimed to identify any changes in bus service frequency in the study area.

The results of the research provided a detailed picture of the travel patterns and perceptions of users of the Borders Railway and an important insight into the barriers of using the service amongst both one-off and non-users. Key findings included:

- Outturn passenger numbers in the first year of operation were higher than forecast at all the Scottish Borders stations and lower than forecast across all the Midlothian stations;
- A large proportion (nearly 40%) of recorded users of the service were tourists, with a considerable proportion of this group stating that they would not have made their trip were it not for the railway;
- The re-opening of the line has led to changes in residential and employment choices, with over 50% of users who had moved home and over 80% of those who moved employment since the line re-opened stating that the railway was a factor in their decision;

- A considerable number of users had switched from car to rail since the line re-opened, with 57% of users previously travelling by car (equating to an estimated 40,000 saved car journeys);
- There was also a shift from bus to rail, with 29% of users stating that they previously travelled by bus (equivalent to 22,000 bus journeys);
- Users were least satisfied with the facilities / services at stations and the availability of staff at the stations - issues which likely reflect the fact that all Borders stations are unstaffed and were without toilet facilities (except for the Interchange at Galashiels) at the time of the study;
- The bus was a more popular alternative amongst non-users from Midlothian compared to non-users from the Scottish Borders, with a larger proportion of Midlothian non-users stating that they didn't use the service because of the lower cost of the bus, the greater convenience provided by bus options and the ability to use the National Entitlement Card (NEC) on buses; and
- There have been some changes in the bus network within the vicinity of the line since the line re-opened, including reductions in the frequency of some services, most notably the reduction of the X95 service from a 30-minute to an hourly service.

Passenger Numbers

The Year 1 Evaluation Report noted that a total of **1,267,599** passengers were carried in the first full year of operation (defined as the period 20/09/2015 to 17/09/2016 based on Network Rail industry periods). This was compared to a forecast figure of 1,294,272 although there were large differences at the station level with over-forecasts at the Midlothian stations and under-forecasts at the Borders stations.

In Year 2, analysis of LENNON data provides an equivalent figure of **1,387,819** (defined as the period 18/09/2016 to 16/09/2017), an overall increase of **9.5%** over Year 1. It is common for passenger numbers on new rail services to 'ramp up' over time and this figure is broadly in line with expectations in this respect. Overall, the number of people travelling to Galashiels and Tweedbank has fallen slightly compared to Year 1 which may be a reflection of a the 'novelty' impact of the new line wearing off. Otherwise all stations, including all Midlothian stations, have seen an increase in inbound and outbound travel since Year 1.

3 Primary Research Approach

Overview

This Chapter provides a brief overview of the methodology adopted in delivering the research. It includes details of the approach taken and content of the User and Non-User Surveys and the number of responses received.

User Survey

Survey Content

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. Table 3.1 below provides a summary of the key sections and topic areas covered by the Year 1 User Survey. To ensure compatibility with the previous work, the Year 1 User Survey was used as a basis for the Year 2 Survey. Given the greater focus on tourist users however, a number of additional tourism based questions were included. These covered:

- What attracted visitors to make their trip, and
- An overall rating for their trip as a whole

Table 3.1: User Survey Content

Survey Section	Topics Covered
About your Journey	<ul style="list-style-type: none"> • origin & destination station • trip start and end points • method of transport used to access / egress station • ticket type • trip purpose • ability to get a seat
Travel Prior to the re-opening of the Line	<ul style="list-style-type: none"> • Was current journey made by another mode previously • Mode used previously • Benefits of switching to rail • How would you make trip if Borders Railway had not re-opened
How has the Borders Railway Affected You	<ul style="list-style-type: none"> • Impact / benefits of Borders Railway (improved access etc.)
Borders Railway and Your Life Choices	<ul style="list-style-type: none"> • Impact of railway on housing and employment location, number of hours worked, and car ownership
Visitors	<ul style="list-style-type: none"> • Trip type (day trip OR overnight stay) and trip destination (Edinburgh, Midlothian OR Scottish

	<p>Borders)</p> <ul style="list-style-type: none"> • Accommodation type and spend (where applicable) • Tourist activities undertaken and spend • Home location • Impact of railway on decision to make trip • Propensity to make trip if Borders Railway had not re-opened and what alternative activities would have been undertaken
Views of the Service	<ul style="list-style-type: none"> • User Satisfaction with aspects of service • Any other comments

Method

As with the Year 1 User Survey, the Year 2 User Survey was 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, where required, complete the survey over the telephone. The user surveys were undertaken over the following four days:

- Wednesday 23rd August;
- Saturday 26th August;
- Wednesday 6th September; and
- Saturday 16th September.

A Fieldwork Schedule was developed prior to conducting the surveys using passenger counts provided by ScotRail. This covered trains departing Tweedbank between the hours 0559 and 1801 and departing Brunstane between the hours of 0659 and 1904.

Achieved Response

In total, 825 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. The responses to this question were then used to calculate an estimated annual trip figure for both single and return trips for each respondent using the approach outlined by Appendix B. Overall, an estimated 100,000 annual single trips

were captured by the sample which represents approximately 8% of the passenger journeys recorded in the first full year of the railway being open.

1 Non-user Survey

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

Survey Content

The primary purpose of the Non-user survey was to gather information on the perceived barriers to using the service. During the Year 1 Surveys, the definition of a Non-User was broadened out to include one-off users. The rationale behind this was that (a) it would be useful to understand why one-off users had not made greater use of the railway and (b) it was unlikely that these individuals would be captured via the User Survey. Given the time that has elapsed since the re-opening of the line, at the outset of the Year 2 study, it was agreed that this definition should be further broadened to include those who had used the service up to five times since its opening in September 2015. Including this group ensured that the Non-User Survey captured information on why low frequency users do not make greater use of the railway.

As with the User Survey, the Year 1 Non-User Survey formed the basis for the Year 2 Survey to ensure consistency across both datasets. Overall, the Year 1 Non-User Survey included questions on:

- Main purpose of trip on the Borders Railway (one-off and occasional users only);
- Origin / Destination Stations (one-off and occasional 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; the ability to use the National Entitlement Card on the bus; difficulty getting a seat or getting on the service due to capacity constraints; bus connections to / from the station being inconvenient; lack of parking facilities; and poor reliability (one-off and non-users);
- Types of improvement which would encourage respondents to use the service more frequently including, for example, improved reliability, frequency, and capacity; improved public transport services to / from the station; improved station facilities; and more through services to and beyond Haymarket (one-off and non-users); and
- How often, where and for what purpose respondents would travel using the service if the improvements they selected were made (one-off and non-users).

For the Year 2 Non-User Survey, a number of further questions were included. These sought to gather information on:

- Whether respondents had noticed any significant changes locally in bus service frequency and / or bus routes since the re-opening of the line;
- The impact of such changes in bus provision (e.g. inability to access key services, the inability to access key services at the time required etc.); and
- Whether respondents had noticed any significant changes in the level of traffic / congestion since the re-opening of the railway.

Sample Identification

The sample of Non-Users of the Borders Railway was identified using the catchment tiers utilised in the borders Baseline Study and the results of the Year 1 Evaluation, and information on the outturn passenger trips by station. Each of these are discussed below.

Catchment Tiers and Year 1 Evaluation

For the Non-User Survey to be effective, it was important to ensure that using the Borders Railway is a realistic option for the respondents selected to take part in the study. For example, it would not be useful to ask residents of areas outside of the catchment area for the line why they have not used the service. To account for this, as part of the Borders Railway Baseline Study, TRACC accessibility planning software was used to identify a series of potential catchments based on access to the station as follows. 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
- **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.

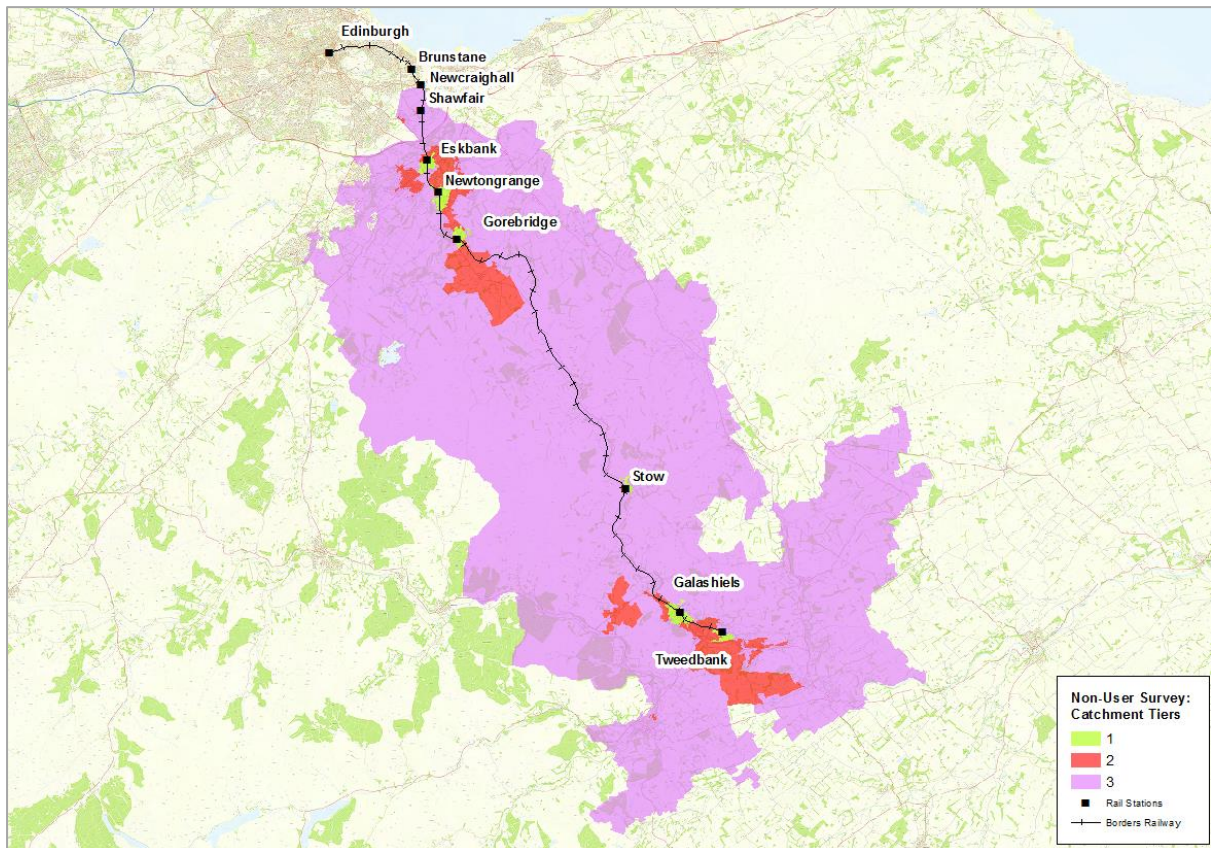


Figure 3.1: Geographical Extent of Catchment Tiers

During the Year 1 Evaluation, these tiers were used as an approximate catchment area for the line, with only residents located in these locations contacted to take part in the Non-User Survey. For the Year 2 Non-User Survey, a similar approach was adopted. However, in light of the results of the Year 1 User Survey which showed that users of Tweedbank were drawn from a large geographic area, the tiered area in the south was extended to include Hawick, Kelso and Jedburgh.

Outturn Passenger Numbers

The number of trips originating at the Midlothian stations during the first year of operation of the Borders Railway were significantly below both the number of trips originating at the Scottish Borders stations and forecast levels. With this in mind, to effectively target non-users of the Borders Railway, the Year 2 Non-User sample was targeted towards residents of Midlothian above those in the Scottish Borders to gain a better understanding of why they don't use the service as much as anticipated.

Survey Method

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

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

As part of the 2015 Borders Railway Baseline Household Survey, participants were asked a series of questions including (i) if they anticipated using the Borders Railway in the first 12 months of operation and (ii) whether they would be willing to be contacted again for future research. In total, 251 respondents answered yes to both questions, with 171 of these living within the identified catchment areas discussed above.

During the Year 1 Evaluation, these 171 respondents were contacted by telephone and asked if (i) they would be willing to complete the Non-User Survey and (ii) whether they had used the Borders Railway since it re-opened. Of these 171 respondents 30 took part in the survey and 43 stated that they had used the service and therefore the survey was no longer applicable to them. As part of the Year 2 surveys, this group of 30 respondents was contacted again and asked to take part in the Year 2 Non-User Survey. As with the Year 1 Survey, respondents were contacted via telephone using the telephone details they provided during the Baseline Survey.

The responses from this database were then supplemented by a 'conventional' telephone survey of residents from the Scottish Borders and Midlothian identified through an electoral roll database

Achieved Responses

In total, 250 responses were received to the Non-User Survey. Overall, 64% (n=161) of the overall sample live in Midlothian, with 36% (n=89) based within the Scottish Borders. A breakdown of the sample characteristics is provided in Appendix C.

Consultation

As noted above, in addition to the surveys, the Year 2 study included a series of consultations with bus operators and local councils in the Borders and Midlothian. During the Year 1 Evaluation, a public transport frequency analysis was undertaken using TRACC accessibility software to establish whether there had been any changes in bus service frequency since the re-opening of the Borders Railway. As part of this Year 2 study, this frequency analysis was repeated using up to date public transport data. The consultations aimed to establish the extent to which any identified changes were a result of the re-opening of the line. Consultations were

undertaken with Scottish Borders and Midlothian Council; First Group; Lothian Buses; and Borders Buses.

The consultations took the form of semi-structured telephone consultations. Topic guides were developed to inform the discussions. These provided a loose structure for the meetings, with the discussions generally allowed to take their own course reflecting the specific remit of each consultee. Following each meeting, the key points from each discussion were documented in a note and sent to the individual consultee for amendment and approval.

4 Investment Objectives

Overview

The primary purpose of this research was to build upon the results of the Stage 1 Evaluation (completed in November 2016) and further develop understanding of the extent to which the Borders Railway is on track to meet its Investment Objectives. This Chapter provides a summary of the findings of the research from this perspective. 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 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	<ul style="list-style-type: none"> - 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	<ul style="list-style-type: none"> - 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 those without a car? - To what extent are the changes in bus service provision attributable to the re-opening of the line? - What is the impact in terms of social exclusion of changes in bus service provision?
Prevent decline in the Borders population by securing ready access to Edinburgh's labour (jobs) market	<ul style="list-style-type: none"> - 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	<ul style="list-style-type: none"> - 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?

Investment Objective 1: 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?

Rail industry ‘LENNON’ data were provided by ScotRail and analysed for the Year 2 period. As noted previously, there has been a 9.5% increase in overall passenger numbers from Year 1. This data is based on ticket sales which allows us to identify the station at which the tickets are sold and hence the volumes of travel originating from, and with destinations at each station.

The figures below show ticket sales by origin and destination at each of the new Borders Railway station for Years 1 and 2 respectively.

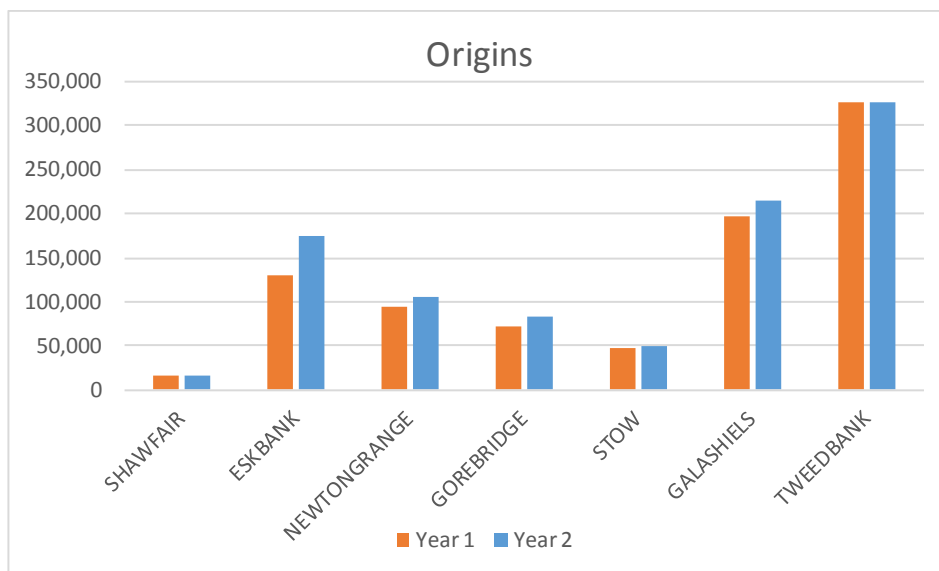


Figure 4.1: Station origins ticket sales, Years 1 and 2

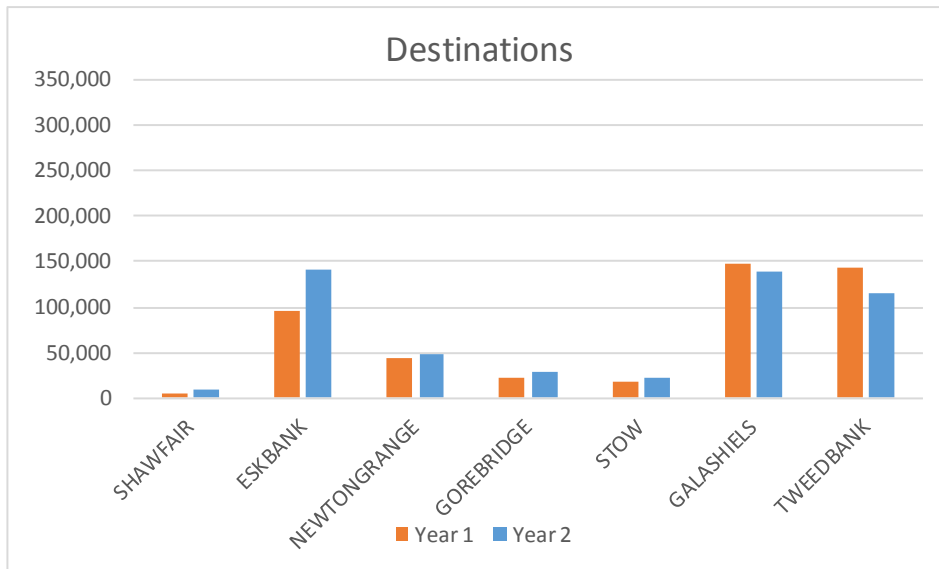


Figure 4.2: Station destinations ticket sales, Years 1 and 2

It can therefore be seen that all of the new stations generate more outbound travel than inbound travel. Eskbank however is also a significant generator of inbound travel and this may be associated with its proximity to Edinburgh College’s Midlothian Campus.

In terms of trends, the reductions at Galashiels and Tweedbank as destinations may be a reflection of a the ‘novelty’ impact of the new line wearing off. Otherwise all stations have seen an increase in inbound and outbound travel since Year 1.

The figure below shows the breakdown of travel from Borders Railway stations by geography.

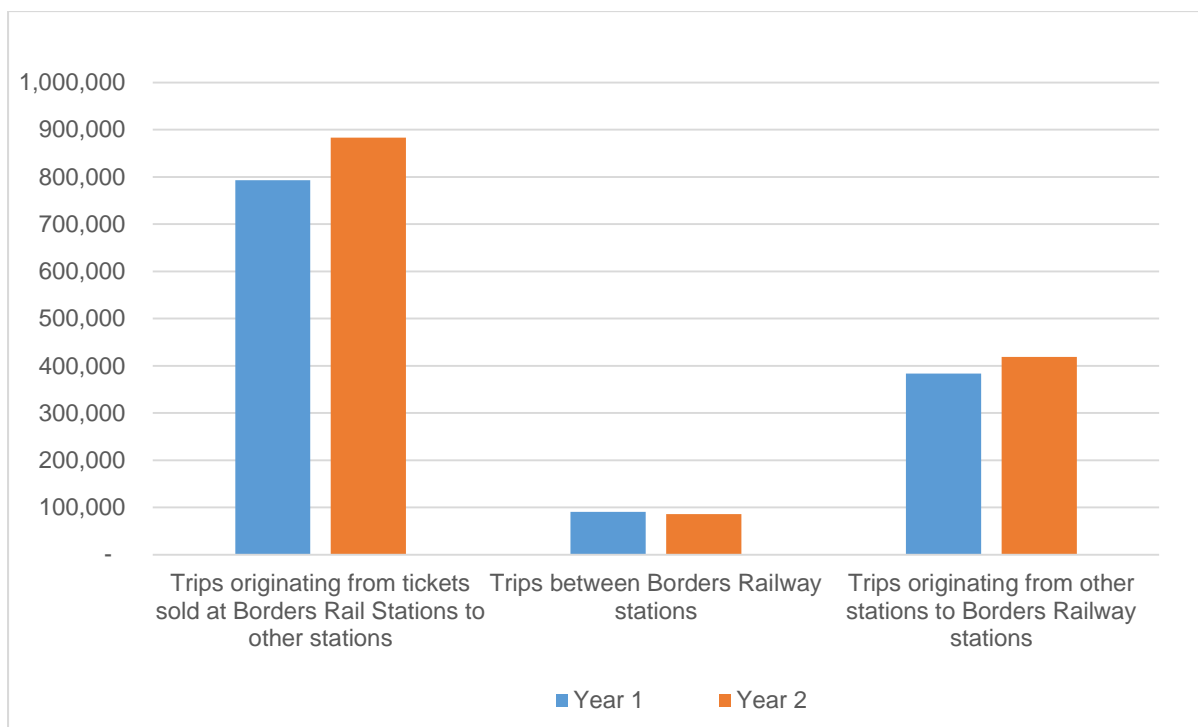


Figure 4.3: Travel to and from Borders Railway stations, Years 1 and 2

The largest market segment is therefore travel from Borders Railways stations to destinations beyond Shawfair. Around 2/3 of trips originating in the Borders were made to Edinburgh stations, and around 45% of Borders Railway trips originating at other stations started in Edinburgh. There is a comparatively small amount of travel between Borders Railway stations.

Key Point:

In Year 2, overall travel on the line has increased by 9.5%. As would be expected trips originating from the new stations outnumber trips destined for the new stations by a ratio of nearly 2:1. The Edinburgh area stations account for around 2/3 of trips from the Borders Railway stations. Eskbank is a significant attractor of trips and the novelty of the new line may be wearing off with an absolute reduction in trips to Tweedbank in Year 2.

Where do users of the Borders Railway live?

Table 4.2 provides a breakdown of the responses to the User Survey by home location of the respondent along with the estimated number of single annual trips associated with the responses. The geographic distribution of those respondents based in Great Britain is also shown graphically in Figure 4.4.

Overall, 56% (n=461) of respondents who provided their home location lived in the Scottish Borders compared to 10% (n=84) from Edinburgh, 6% (n=47) from Midlothian and 6% (n=47) from elsewhere in Scotland. As shown in the table below,

these figures are comparable with those from the Year 1 Survey. However, the Year 2 sample contains a higher proportion of users from Other Scotland, Other UK and Overseas as would be expected given that the survey was undertaken during the summer peak.

In terms of annual single trips, it is estimated that 60% are made by those from the Scottish Borders with 8% from Edinburgh and 7% from Midlothian. In total, 16% (n=132) of respondents did not provide their home location, accounting for around 23% of annual trips in Year 2.

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

Location	Year 2 Survey				Year 1 Survey	
	Number of Responses	Number of Single Journeys	Percentage of Responses	Percentage of Journeys	Percentage of Responses	Percentage of Journeys
Scottish Borders	461	59,586	55.9%	59.6%	60.2%	59.2%
Midlothian	47	6,684	5.7%	6.7%	7.6%	11.8%
Edinburgh	84	7,936	10.2%	7.9%	7.3%	8.7%
Other Scotland	47	2,216	5.7%	2.2%	9.3%	5.5%
Other UK	41	188	5.0%	0.2%	4.1%	0.9%
Overseas	13	376	1.6%	0.4%	2.1%	1.1%
Home location not provided	132	23,064	16.0%	23.1%	9.5%	12.8%
Total	825	100,050				

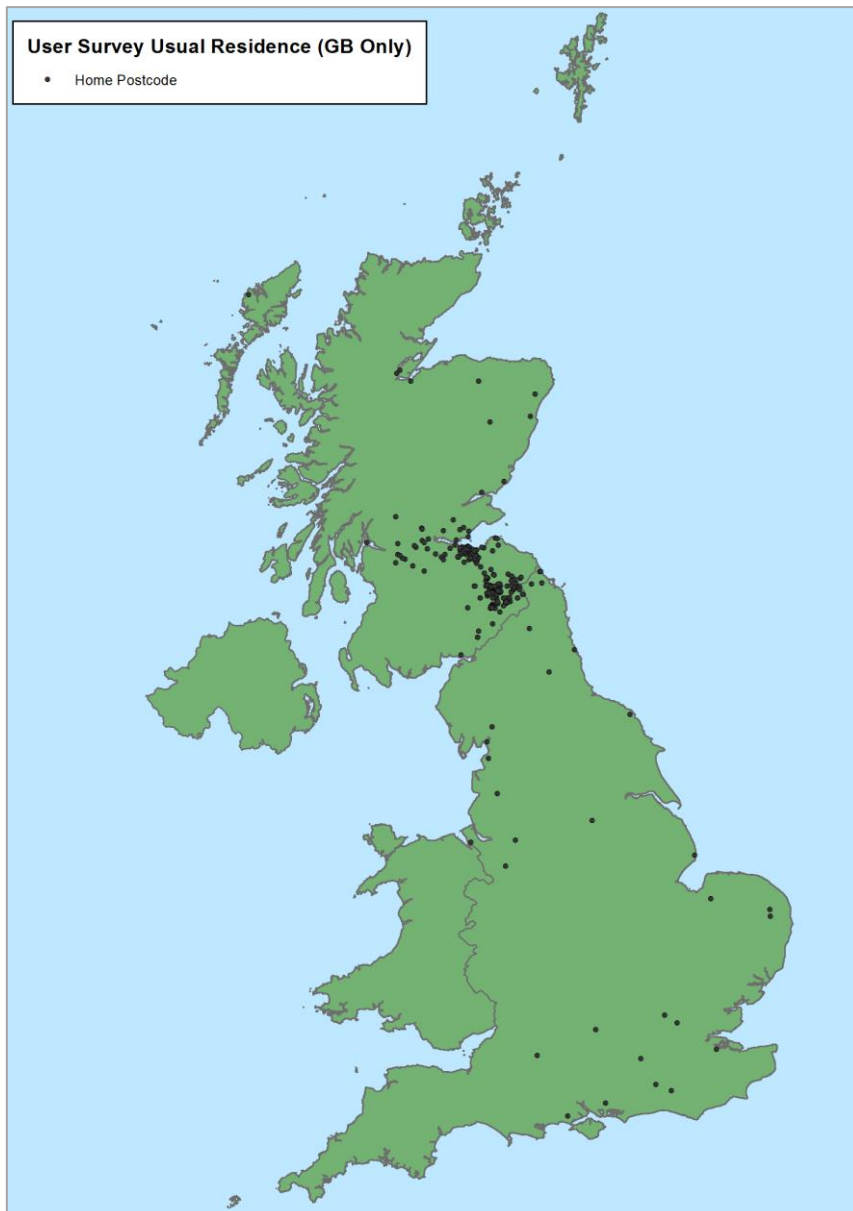


Figure 4.4: Home location of respondents to the User Survey (GB only)

Figure 4.5 and Figure 4.6 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 area for Tweedbank is significantly larger than that of the Midlothian stations with Tweedbank station users travelling from as far as Coldstream, Hawick and Langholm. 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.

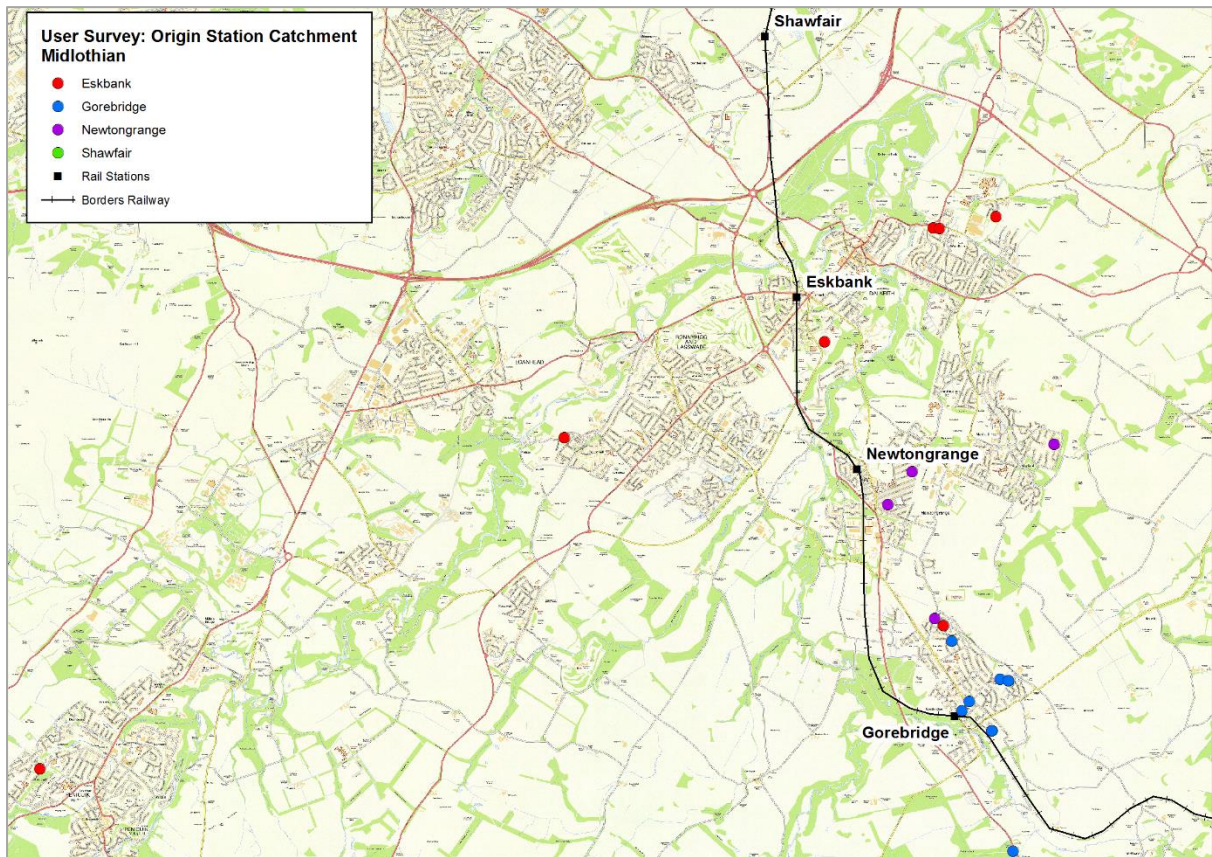


Figure 4.5: Catchment area from Midlothian stations

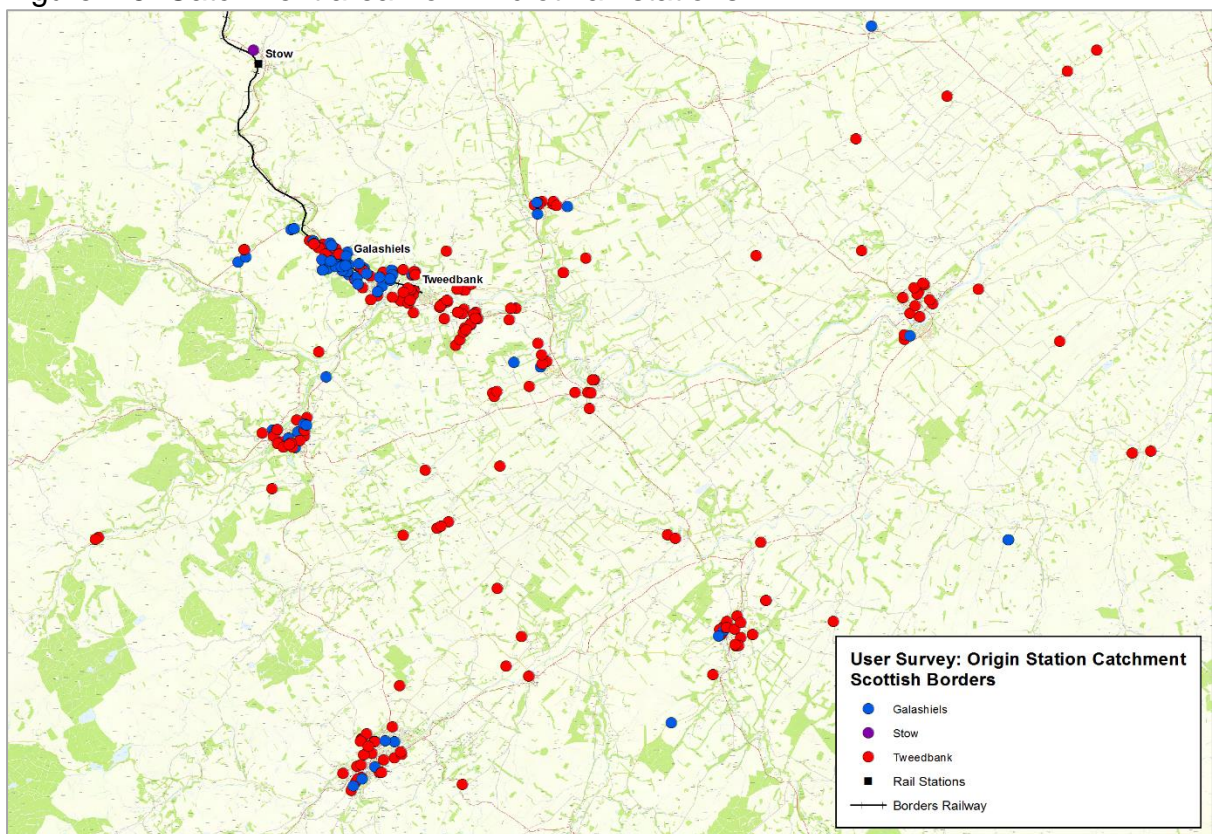


Figure 4.6: Catchment area for the Scottish Borders stations

Key Point:

Overall, 56% of the users captured in the survey lived in the Scottish Borders compared to 6% from Midlothian and 10% from Edinburgh. In comparison to the Year 1 Survey, a larger proportion of users were drawn from locations elsewhere in Scotland, the UK and overseas, suggesting (as was expected given the timing of the fieldwork) that the Year 2 Survey contains a higher proportion of tourist users.

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 4.7 below shows the purpose of respondents' current trip and the same data weighted by the frequency with which respondents make this trip. The majority of respondents are leisure users, with 22% of respondents stating that they were making leisure trips. This compares to 19.9% of users who said they were making commuting trips. However, when the responses are weighted by trip frequency, commuting is the most common journey purpose accounting for 65% of estimated annual single trips (54% commuting to work and 11% commuting to education) compared to 32% leisure trips² and 4% business trips.

Table 4.3 below provides a breakdown of the percentage of trips by commuting, leisure and business purposes for the Year 1 and Year 2 Survey samples as well as the equivalent figures at the Scotland level. The latter are taken from the National Rail Travel Survey, a survey of passenger trips on the rail network undertaken in 2004/05. While the data from this is somewhat dated, the survey provides the most comprehensive assessment of journey purpose at the national level.

Table 4.3: Proportion of Journeys by Journey Purpose

Journey Purpose	Year 1	Year 2	Scotland Rail Network ³
Commuter	65%	65%	59
Business	5%	4%	11
Leisure	29%	32%	30

² Defined using the following categories from the year 2 survey: other leisure (cinema / theatre / eating out / nights out or sport); shopping; attend music concert / theatre / arts festival, visiting family and friends, health / medical appointment, travelling to /returning from a holiday/short break somewhere other than Edinburgh, Midlothian or the Scottish Borders; other

³ National Rail Travel Survey Overview Report 2010, Journey Purpose by Country and Region, Table 4, p18, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/73094/national-rail-travel-survey-overview-report.pdf,

As shown in the table, the proportion of commuter trips recorded in the sample is slightly higher than the Scottish figures. The high levels of commuting on the service suggests that the line has improved access to employment opportunities for residents of the Scottish Borders and Midlothian which in turn could help to attract and retain people in these areas.

The breakdown by purpose is broadly comparable to that of the Year 1 sample although the Year 2 sample has:

- A higher proportion of commuting trips (54% compared to 45% of annual single trips)
- A smaller proportion of education trips (11% compared to 20% of annual single journeys)
- A slightly higher proportion of leisure trips⁴ (21% compared to 16% of annual single trips)

These differences are likely to be a result of the different time-period over which the Year 2 Survey was undertaken, with a number of the survey days falling outside of the school term time and/or during the Edinburgh Festival.

⁴ Defined using the following categories from the Year 1 survey: Leisure (cinema / theatre / eating out / nights out or sport); and Shopping

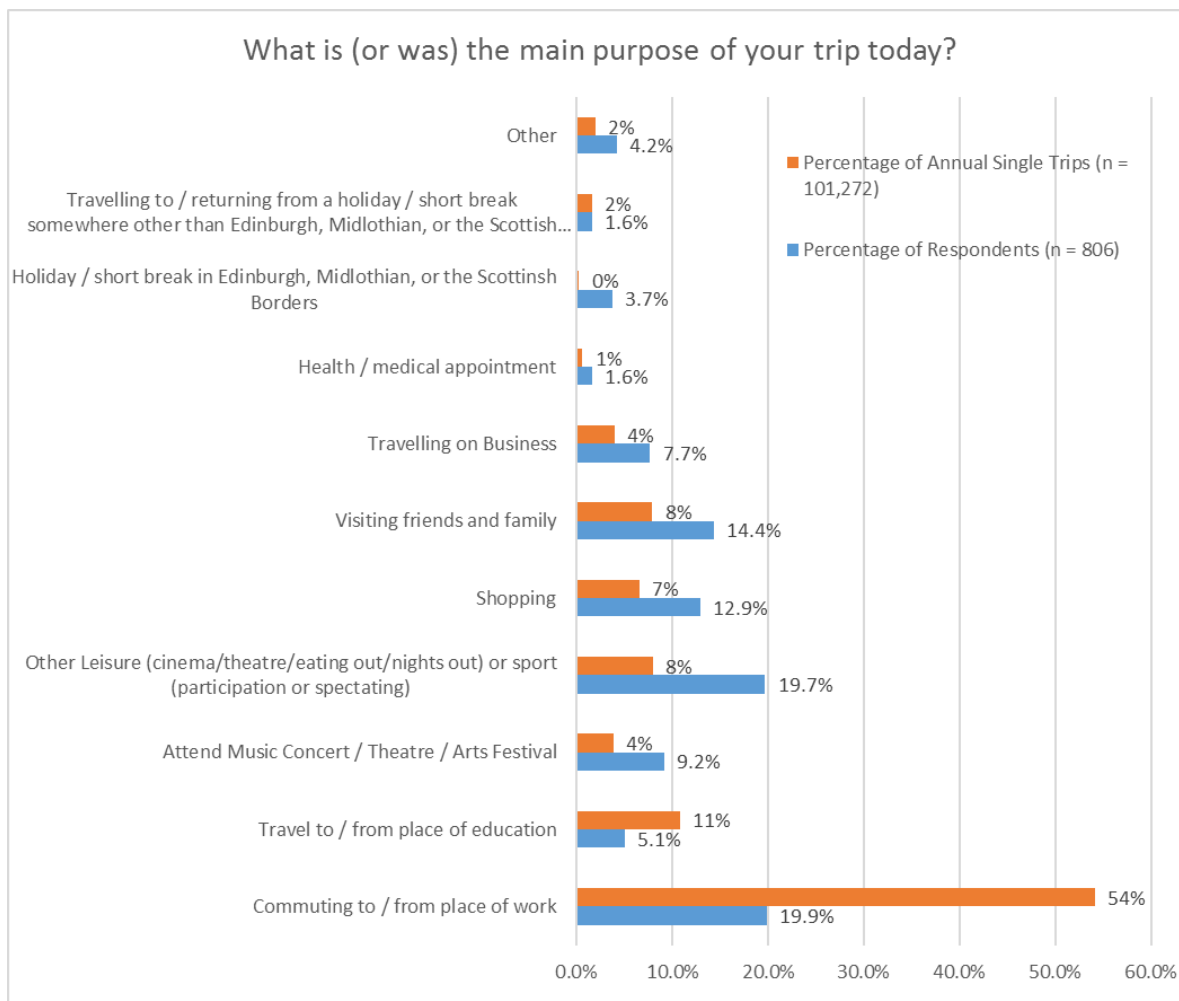


Figure 4.7: Trip purpose by percentage of responses and percentage of single trips

Key Point:

Commuting is the most common journey purpose when trip frequency is considered, accounting for 54% of annual single journeys. In comparison to the Year 1 Survey, there is a higher proportion of commuting and leisure trips and a smaller proportion of educational trips.

How frequently are people making trips using the Borders Railway?

Figure 4.8 shows the frequency with which respondents indicated they make their current trip. Overall, the largest proportion of respondents said that they were relatively infrequent users of the Borders Railway, with the majority (24%, n=191) indicating that they make the journey less than once a month. As shown below, this proportion increases to 29% (n=102) when only those travelling on the weekend were considered. The results are broadly comparable with those of the Year 1 study.

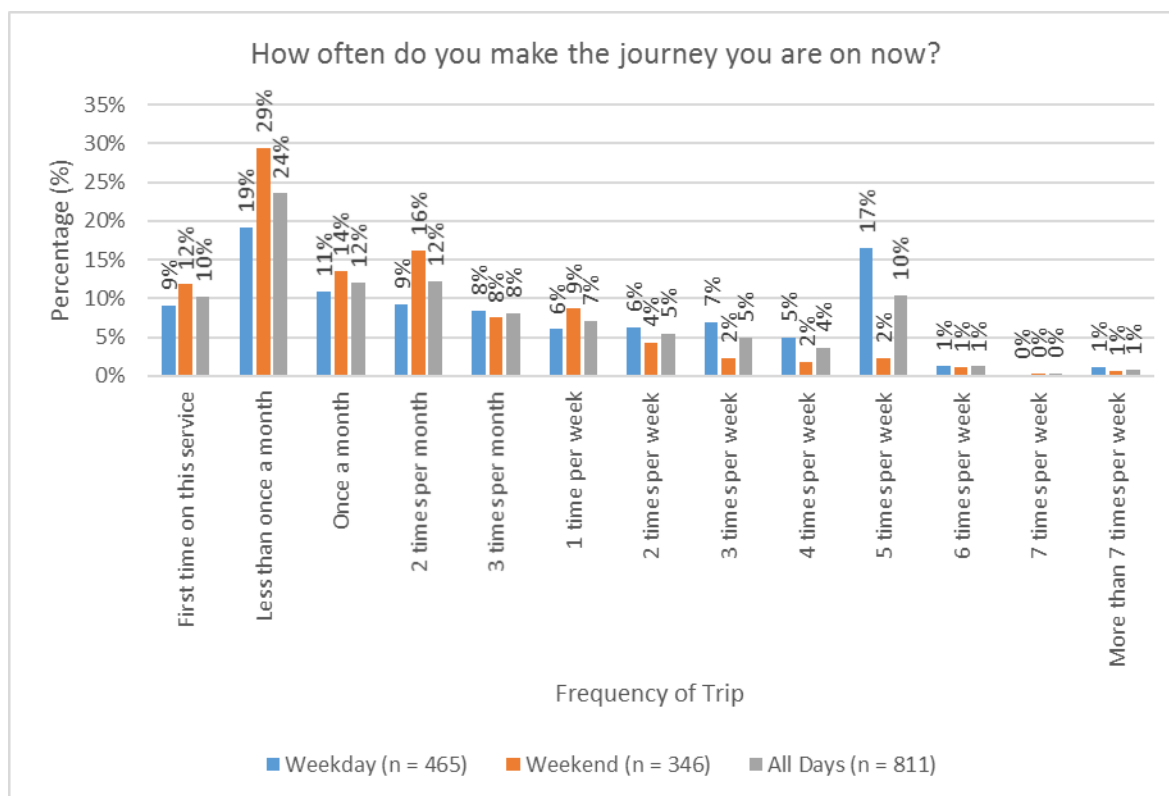


Figure 4.8: Frequency of trip by weekday / weekend

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 not previously make / do?

Overall, 31% (n=250) 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 that they made their 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 estimated that 35,900 annual single trips, over a third (35%) of the total number of journeys recorded via the sample would not have been undertaken had the Borders Railway not re-opened.

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 4.9 below shows the net agreement (the proportion of respondents who agree with the statement minus the proportion of respondents who disagree, excluding those who answered 'Don't Know') with a range of statements for the sample as a whole and for respondents from Midlothian and the Scottish Borders.

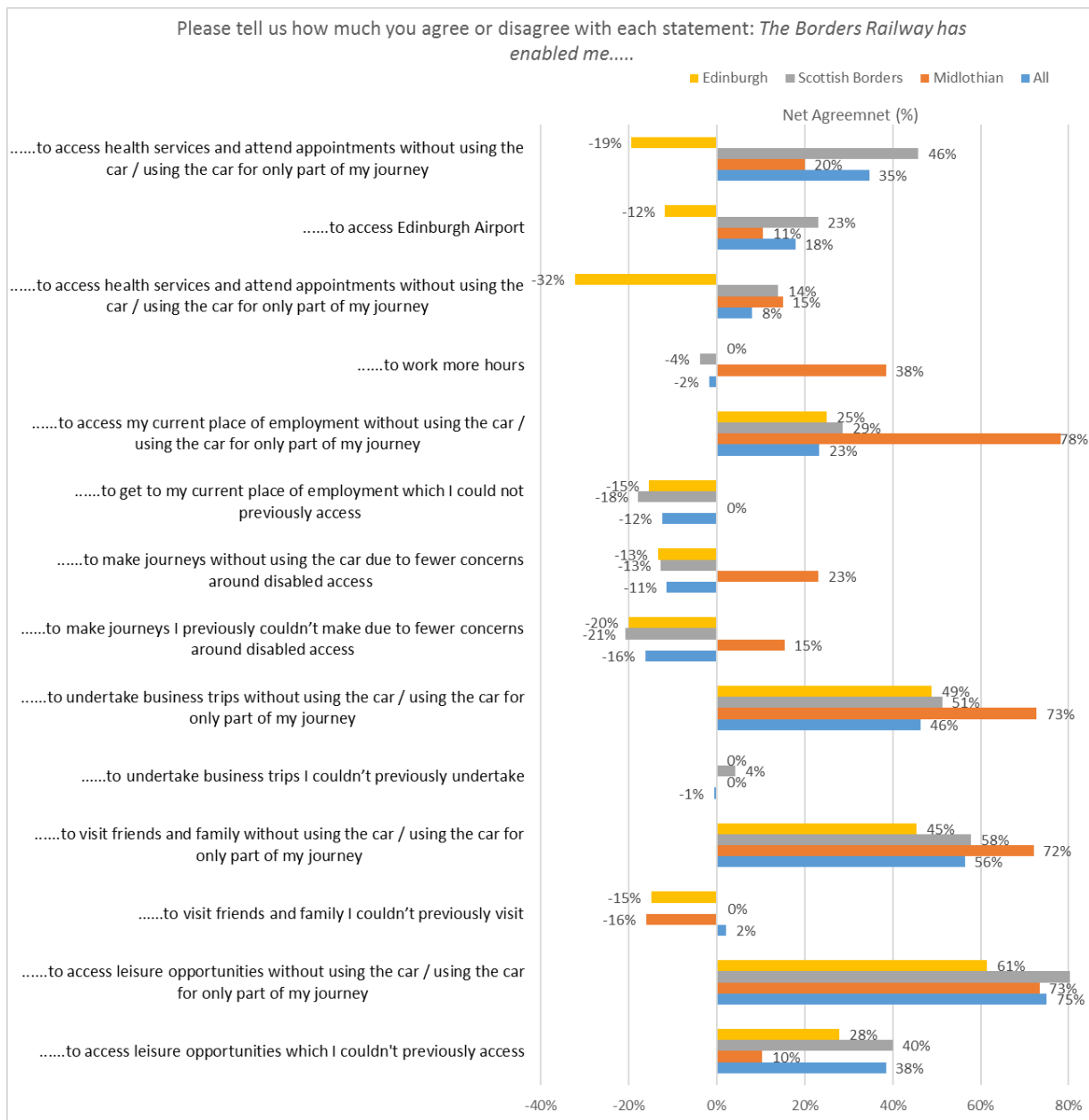


Figure 4.9: The impact of the Borders Railway (net agreement)

Generally, the results suggest that the re-opening of the line has led to people making journeys 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 the net agreement was 38%. This was also the most popular response (in terms of new activities) in the Year 1 Survey. However, net agreement in Year 1 was lower at just 29% reflecting the higher proportion of leisure users in the Year 2 sample.

Additionally, as well as encouraging new trips, the data indicates that the re-opening of the railway has also been successful in encouraging modal shift from the private car to rail. For example, there was a 75% net agreement with the statement '*the Borders Railway has enabled me to access leisure opportunities without using the car / using the car for only part of my journey*' and a 56% net agreement for the statement '*the Borders Railway has enabled me to visit friends and family without using the car / using the car for only part of my journey*'. The net agreement for both the above were higher in the Year 2 Survey, likely as a result of the higher number of leisure users captured via the sample. Similarly, there was a higher net agreement that the railway had enabled access to Edinburgh Airport in Year 2 compared to Year 1 (18% compared to 8%). It is noted that the sample size, particularly for Midlothian, is very small which could impact the reliability of the results. This could be a reason for a significantly larger proportion of Midlothian residents agreeing with the statement '*the Borders Railway has enabled me to access my current place of employment without using the car / using the car for only part of my journey*' compared to those in Edinburgh and the Scottish Borders.

Key Point:

The data suggests that the railway is enabling people to make new journeys and take up new opportunities, particularly leisure opportunities, which they could not previously access, with approximately 35,900 (35%) 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. There was also net agreement that the line had enabled access to Edinburgh Airport.

Investment Objective 1 Summary

Promote accessibility to and from the Scottish Borders and Midlothian to Edinburgh (including the airport) and the central belt

Overall, the results of the research suggest that the Borders Railway is achieving Investment Objective 1. There are large volumes of users using the service to travel between the Scottish Borders / Midlothian and Edinburgh, with total patronage on the line increasing by 9.5% since Year 1. As may be expected, the majority of patronage is towards Edinburgh with Tweedbank the most frequent origin and Edinburgh Waverley the most frequent destination. Since Year 1, inbound and outbound travel at all the Midlothian stations has increased while the number of people travelling to Galashiels and Tweedbank has fallen slightly, with the latter likely a reflection of the novelty impact of the line wearing off. While commuting is the most common journey purpose, there are also a significant number of leisure and tourist users and evidence that the line has improved access to opportunities and encouraged people to make additional / new trips which they previously did not make, with approximately 35,900 of the estimated annual single trips recorded via the Year 2 sample falling into this category.

Investment Objective 2: 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?

In total, 15% (n=101) of respondents to the question stated that their household did not own or have access to a car. However, this figure fell to 13% (n=65) amongst those from Midlothian, the Scottish Borders and Edinburgh and to 9% (n=39) for residents of Midlothian and the Scottish Borders. As would be expected, car ownership was lower amongst those from Edinburgh with 38% (n=26) of Edinburgh residents stating that they did not have access to a vehicle compared to 9.1% (n=38) of Scottish Borders residents⁵. The proportion without access to a vehicle recorded in the survey is lower than the Census 2011 data for Midlothian, the Scottish Borders and Edinburgh (25%, 21% and 40% respectively). However, rail users are generally drawn from higher income groups and therefore figures below this rate are not unusual.

Key Point:

The re-opening of the Borders Railway has provided those without a car the means to access destinations along the corridor more quickly. The data suggests that 13% of users residing in Midlothian, the Scottish Borders and Edinburgh did not own or have access to a vehicle. This is relatively low compared to the results for the total population of Midlothian, Scottish Borders and Edinburgh as recorded in the 2011 Census but is likely down to the fact that rail users are usually drawn from higher income groups.

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 those without a car?

As discussed above, as part of the Year 1 Study a public transport frequency analysis was conducted using TRACC accessibility software in order to examine the impact of the line on bus service frequency.

A bus frequency analysis calculates a frequency value (number of services per hour) for all bus services stopping at each stop over the period for which the calculation is undertaken. During the Year 1 Study, 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).

To identify any further changes since the Year 1 Study, as part of this Year 2 Study, a third calculation was completed using the public transport network from April 2017. Figure 4.10 and Figure 4.11 below show the change in bus service frequency between July 2015 and April 2017 for each stop over the AM period (0700 – 0930).

⁵ It is noted that the sample size for respondents to this question who stated they were from Midlothian was too small to draw any conclusions.

This shows that there has been a decline in a number of services during the 2015 – 2017 period.

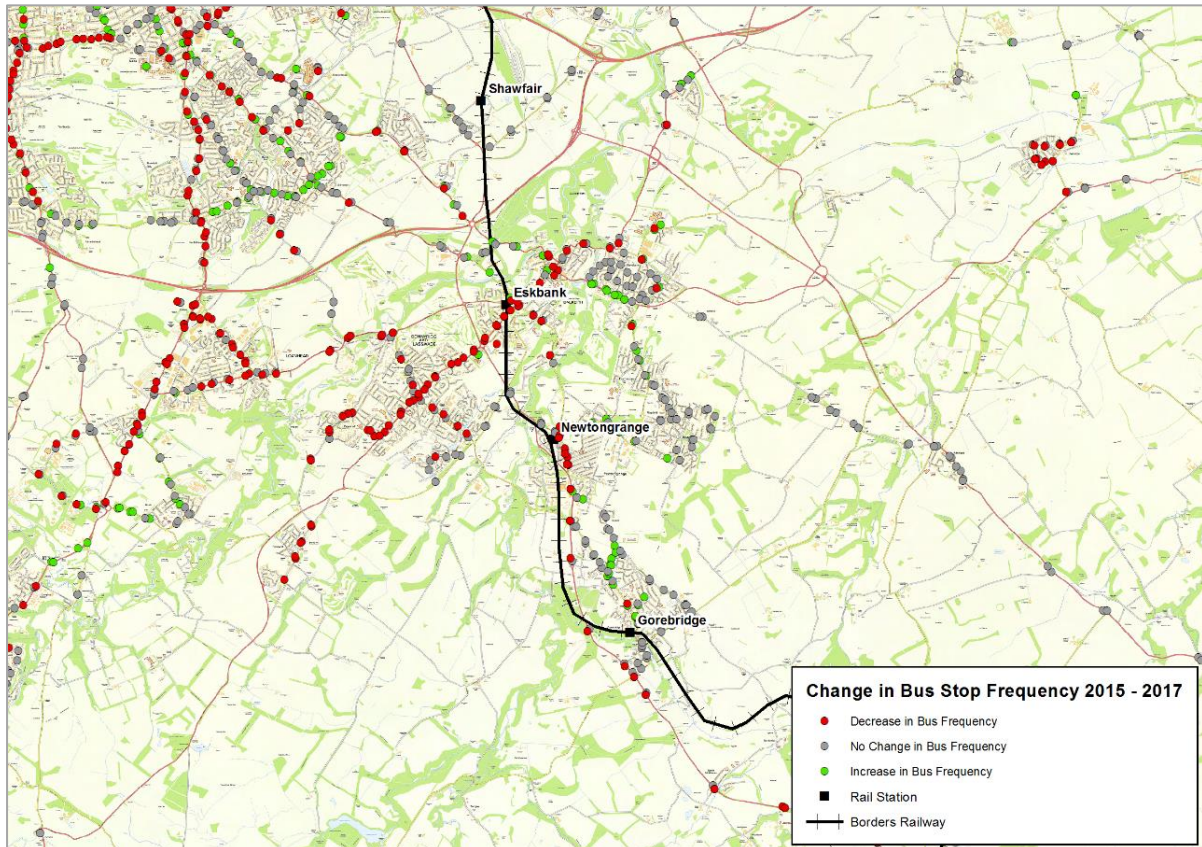


Figure 4.10: Change in bus stop frequency 2015 - 2017 (Midlothian)



Figure 4.11: Change in bus stop frequency 2015 - 2017 (Scottish Borders)
The key changes can be summarised as follows:

In Midlothian:

- The frequency of Service 49 (Portobello - Edinburgh - Dalkeith - Rosewell) was reduced to a 30-minute service in October 2015
- The frequency of Service 29 (Silverknowles – Gorebridge) was increased from a 30-minute to a 20-minute service on Saturdays and an additional morning peak service was added.
- The frequency of Service 33 (Baberton – Royal Infirmary - Sheriffhall) was reduced from a 15-minute to a 20-minute service in April 2017

In the Scottish Borders:

- The frequency of Service X95 (Galashiels – Edinburgh) was reduced from a 30-minute to an hourly service in August 2016. This reduction is likely to have led to a slight reduction in public transport access for areas on the A7 which are not directly served by the Borders Railway, including for example, Herriot and Fountainhall
- A number of reductions in service frequency at bus stops in Galashiels and Tweedbank which are a result of a number of changes introduced by Frist Group (in August 2016) including the 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.

- The introduction of the Borders Buses Sightseeing Service in May 2017. The service runs every Saturday and Sunday between May and September and connects Galashiels to Abbotsford House, Tweedbank, Melrose, St Boswells, Dryburgh Abbey, Wallace Statue and Scotts View.

Key Point:

There have been a number of changes in bus service provision since the re-opening of the Borders Railway. These include a reduction in service frequency on several routes, including Services 49 and 33 in Midlothian and the X95 in the Scottish Borders, and the withdrawal of several services linking Galashiels to surrounding towns. Service 29 in Midlothian has seen an increase in service frequency and in the Scottish Borders, Borders Buses have recently introduced the Sightseeing Service which runs on weekends during the summer period.

To what extent are the changes in bus service provision a result of the re-opening of the line?

As discussed above, in order to better understand the rationale behind some of the above changes in the bus network, a series of consultations were held with bus operators in the Scottish Borders and Midlothian as well as the Scottish Borders and Midlothian Councils.

In Midlothian, the key bus operator is Lothian Buses. Overall, there are three Lothian Bus services which operate within the Borders Railway corridor, namely: Service 3 (Clovenstone – Dalkeith Campus or Mayfield), Service 29 (Silverknowes – Gorebridge); and Service 33 (Baberton – Royal Infirmary - Sheriffhall). Service 29 which, as discussed above, has seen an increase in service frequency, is the faster and more direct route with Service 3 and 33 more local in nature. In general, the comments received from both Midlothian Council and Lothian Buses suggest that the Borders Railway has had a limited impact on bus patronage in Midlothian. It was noted that while the rail service provides a very good option for those living near to the station, for many Midlothian residents the bus still provides the quickest journey times to Edinburgh. This is because of both the higher frequency of bus services and the greater network coverage in terms of bus stops compared to rail stations. In general, it is quicker for residents to travel by bus all the way to Edinburgh than travel into the station and then onward by rail. In addition, the availability of the Lothian Buses £1.60 flat fare to and from Edinburgh (making the bus far cheaper than the equivalent train fare of £5.40) as well as the ability to use the National Entitlement Card for free bus travel further encourages bus use. It was noted that feeder bus services to the rail stations in Midlothian are not provided as they would not be viable as the journey time saving would be minimal. In addition, the buses are more frequent than the rail services and therefore integration would generally be poor, with limited opportunity to change service timings because of the need to integrate with Edinburgh Bus Services.

In the Scottish Borders, First Group was the key operator. However, the company announced in March 2017, that it would be discontinuing its operations in the county with West Coast Motors (now trading as 'Borders Buses') taking over the operation of the First Borders network. First cited the loss of passengers and revenue on the X95 Service as a result of the new rail service as a key reason for both their decision to reduce the X95 between Galashiels and Edinburgh to an hourly service and their subsequent decision to cease operations in the Scottish Borders. The firm saw a significant decline in both patronage and revenue on the X95 service following the re-opening of the Borders Railway with a 13% reduction in passenger numbers and a commercial revenue reduction of 35% comparing the period January to August 2016 to the previous year. The greater fall in revenue was a result of passengers continuing to use the service but only to access the rail station.

For example, prior to the re-opening of the railway, bus passengers travelling from Hawick to Edinburgh would travel by bus for the whole journey. However, following the re-opening of the line, First found that a significant proportion elected to get off the bus at Galashiels and travel onwards from there by train. While such users still counted in the passenger numbers, the revenue generated from them was significantly lower due to the shorter journey. The fall in passengers and revenue applied to both standard tickets and concessionary fares, however, the latter fell by a lower percentage, as a larger proportion of those entitled to free bus travel continued to use the service rather than switch to rail. According to First the key determinant of why people switched to rail was journey time. In contrast to Midlothian, where taking the bus to the rail station and then travelling on by train often results in a longer journey time, in the Scottish Borders, travelling by rail, even where a bus service to the rail station is required, is, for many, more competitive in terms of journey time. As a result of the declines, First reduced the X95 to a 30-minute service between Galashiels and Edinburgh. However, the reduction in operating costs did not compensate for the loss of revenue, with the result that the company eventually decided to discontinue their operations within the Scottish Borders. In terms of the introduction of feeder services, First noted that this had been discussed with Scottish Borders Council prior to the re-opening of the line. However, the council felt that the bus network should initially stay as it was when the line re-opened until the impact on travel patterns was clear.

Since taking over operation of the Scottish Borders network Borders Buses has not made any changes to the timetables or routes of services previously operated by First. However, the company has introduced a brand new fleet which has improved reliability. In addition, the company introduced the new Sightseeing service in Summer 2017 as discussed above. This service has been well-received and Borders Buses hopes to run the service again in 2018 with the addition of integrated ticketing sold at Edinburgh Waverley.

In terms of future plans, Borders Buses is working with the Scottish Borders Council to revise aspects of the network and improve connectivity in the area, looking at both commercial and subsidised services. The company is looking to integrate services across the network with train services running from Tweedbank and Galashiels and

are also considering introducing coaches, as opposed to town buses, to improve comfort and quality for longer journeys.

Key Point:

In general, the comments received from both Midlothian Council and Lothian Buses suggest that the Borders Railway has had a limited impact on bus patronage in Midlothian. This was felt to be a result of a combination of factors, including the higher frequency of bus services compared to rail; the greater network coverage in terms of bus stops as opposed to rail stations; the availability of the Lothian Buses £1.60 flat fare; and the ability to use the National Entitlement Card for free bus travel.

In the Scottish Borders, the re-opening of the railway led to a significant reduction in both passengers and revenue on the X95 service. This route provided a long-distance link between Galashiels and Edinburgh and was in direct competition with the rail line. As a result of the fall in patronage and revenue on this service, First Group decided to discontinue their operations in the Scottish Borders with Borders Buses taking over the operation in March 2017. Since taking over, Borders Buses has maintained the routes and timetables previously operated by First. The company has also made significant investments in the vehicle fleet and introduced a new Summer sightseeing service. In the future, Borders Buses has plans to further develop services and is exploring the potential of better integrating bus and train services and the potential use of coaches on some routes.

What is the impact in terms of social exclusion of changes in bus service provision?

A series of questions were included in the Non-User Survey about respondents' use of bus services in the Scottish Borders and Midlothian and the degree to which they had noticed any change in provision. Overall, 13% (n=22) of respondents who travel by bus stated that they had noticed a change in bus service provision. Figure 4.12 shows the extent to which respondents felt different aspects of bus service provision had improved or deteriorated since the re-opening of the railway. As shown, bus service frequency was identified by over half of respondents as having deteriorated. It should be noted however, that the sample size for this question is relatively small (n=22) which may influence the accuracy of the results.

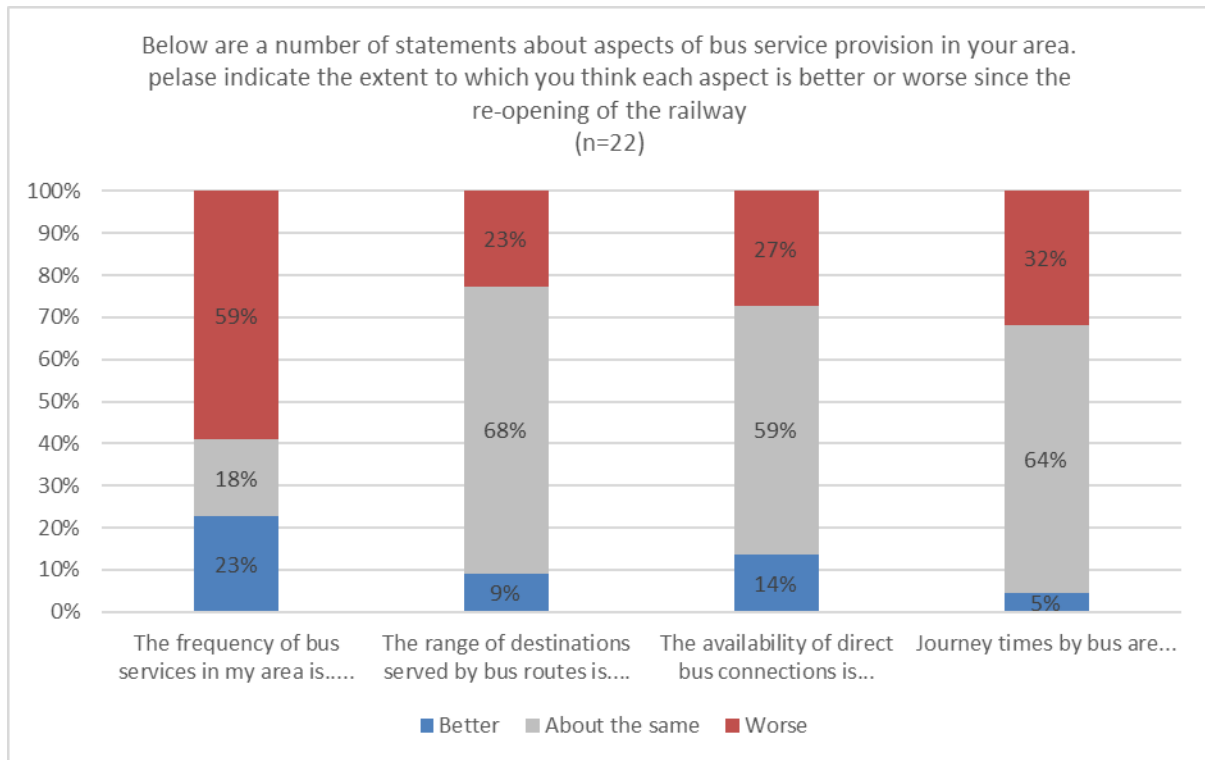


Figure 4.12: Changes in Bus Provision (Responses from Non-User Survey)

Respondents answering the above question were also asked about the impact of the above changes in bus service provision. Figure 4.13 shows the net agreement (proportion of respondents who agree with the statement minus the proportion of respondents who disagree) with a number of statements. While, as discussed above, the sample size is small (n=22), the results do suggest that for, at least a subset of the population, the changes have resulted in a decline in access, with the result that some people are now travelling less overall and/or traveling more by car.

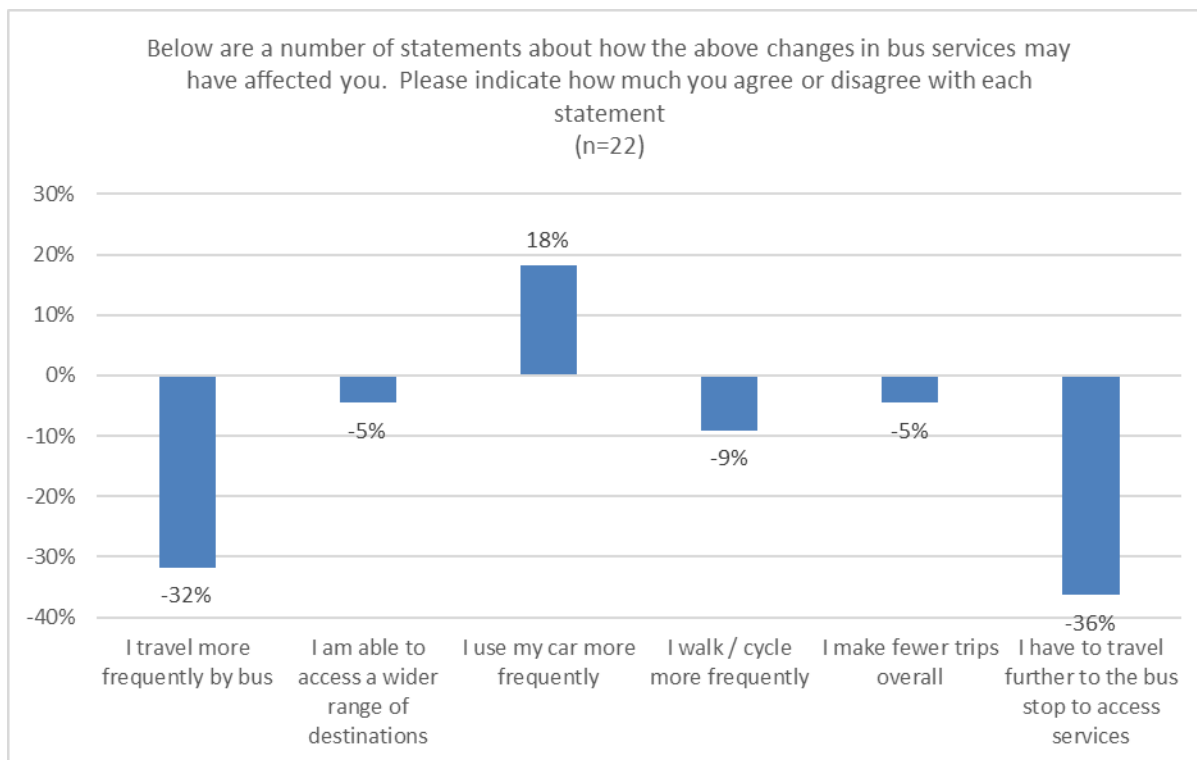


Figure 4.13: The Impact of Changes in Bus Service Provision (Respondents to Non-User Survey)

Key Point:

A series of questions were included in the Non-User Survey about respondents' use of bus services in the Scottish Borders and Midlothian and the degree to which they had noticed any change in provision. While the overall sample size for these questions is small (n=22) and it is therefore difficult to determine the overall extent of the issue, the responses do suggest that some residents of the Scottish Borders and Midlothian have seen a decline in bus service frequency since the re-opening of the railway which has resulted in them travelling more by car and/or making fewer trips overall.

Investment Objective 2 Summary

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

Overall, the results of the research suggest that the Borders Railway is largely achieving Investment Objective 2. The re-opening of the Borders Railway has provided those without a car the means to access the stations along the corridor more quickly and there was strong agreement amongst respondents to the user survey that the railway has enabled them to access opportunities without using the car / only using the car for a portion of the journey. However, while the re-opening of the railway has resulted in improvements in access between the stations, it has also resulted in changes in bus service provision within the study area, most notably the reduction of the X95 service to an hourly service in May 2016. This change is likely

to have led to a slight reduction in public transport access for areas on the A7 served by this route which are not directly served by the Borders Railway, including for example, Herriot and Fountainhall. Feedback from the consultations suggests that the impact on bus services generally has been more keenly felt within the Scottish Borders with the decline in both patronage and revenue on the XA95 ultimately resulting in First discontinuing their operations within the county in 2016. However, since taking over from First, Borders Buses has introduced no further changes to bus service provision and has made significant investments in the network. The impact of the railway on public transport and the opportunities the line provides for those without access to a car will continue to be monitored.

Investment Objective 3: 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 above, commuting accounted for the largest proportion of journeys on the Borders Railway, accounting for 54% of the annual single trips captured by the sample. Of these 58% (n=108) start or end at Edinburgh Waverley while a further 15% (n=21) start or end at stations beyond the Borders Railway such as Haymarket and South Gyle. The proportion of trips starting or ending at Edinburgh in the Year 2 Survey is lower than that recorded in the Year 1 Survey (70%, n=129). This is consistent with the discussion above which showed that a higher proportion of the year 2 sample come from elsewhere in Scotland.

Key Point:

Commuting is the most common journey purpose when travelling on the Borders Railway, accounting for 54% of annual single trips. The majority (58%) of commuters start or end their journey at Edinburgh Waverley. This is lower than that recorded in the Year 1 survey (70%) and is consistent with the discussion above which showed that a higher proportion of the year 2 sample come from elsewhere in Scotland.

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

In total, 17% of respondents (n=114) said that they had moved house since the re-opening of the line. Most of these (59%, n=67) live in the Scottish Borders, 11% (n=12) live in Edinburgh and 6% (n=7) live in Midlothian⁶. However, it is noted that the sample size, particularly for Edinburgh and Midlothian is relatively small. Census data shows that in Scotland as a whole, 89% of the resident population lived in the same address a year ago compared to 82%⁷ of respondents to the User Survey.

⁶ A proportion of those who said they had moved house did not provide a home postcode and therefore not all respondents are included in this breakdown by local authority.

⁷ It is noted that 1% of the sample selected 'prefer not to say' for this question.

Therefore, given the two-year elapsed time since the line opened, the proportion of those moving address is broadly in line with the general population as a whole.

In the Year 1 Survey, 11% (n=94) of respondents overall had moved house since 2015 with 66% (n=62) living in the Scottish Borders, 7% (n=7) live in Midlothian and 18% (n=17) lived in Edinburgh.

Figure 4.14 below shows the extent to which the re-opening of the Borders Railway was a factor in respondents' decision to move house as recorded in both the Year 1 and Year 2 study.

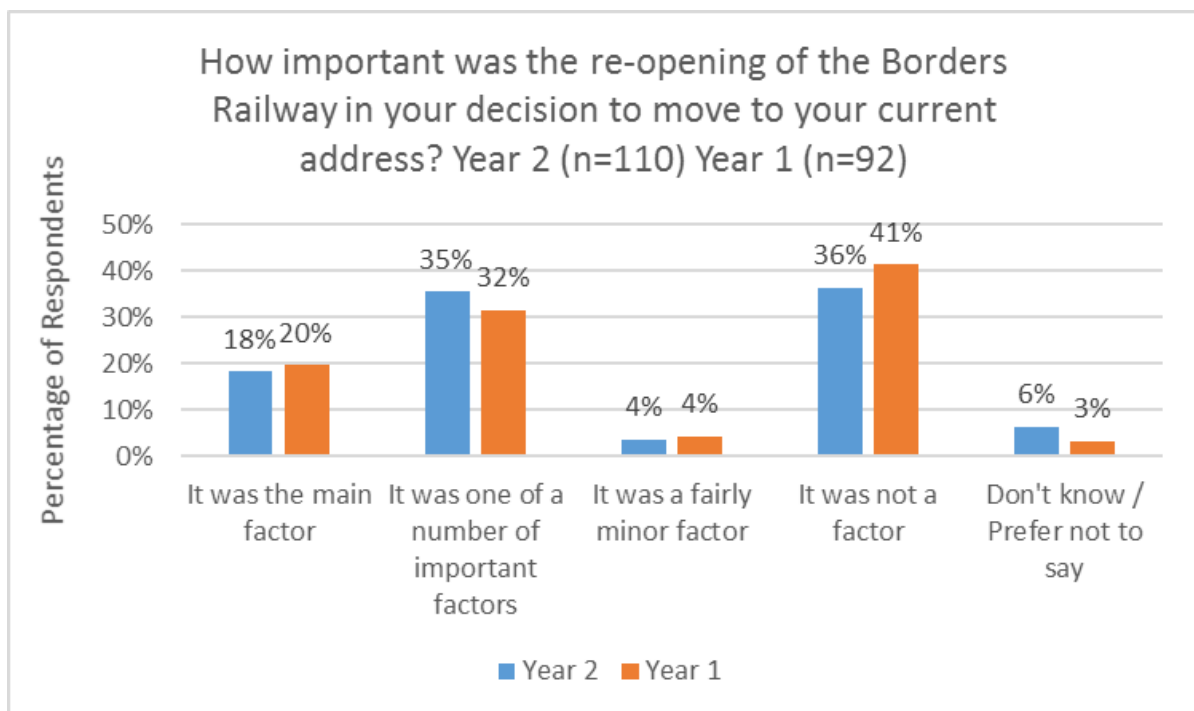


Figure 4.14: Importance of the Borders Railway in respondents' decision to move house

Of those who responded to the question (n=109), the proportion stating that the line had been a factor in their decision to move (i.e. 'main factor', 'it was one of a number of important factors' or 'it was a fairly minor factor'), in the Year 2 Survey (58%, n=63) was very similar to the Year 1 Survey results (56%, n=47).

The proportion of those who had moved home who reported that the Borders Railway had been a factor in their decision to move was higher amongst residents of the Scottish Borders (62%, n=40), compared to Midlothian (33%, n=2) and Edinburgh (25%, n=3). However, the sample sizes for both Midlothian and Edinburgh are very low and therefore it is difficult to draw any conclusions from the data for these areas. Additionally, a number of those who said that they had moved house did not answer the question or did not provide their home postcodes.

Respondents who indicated that the re-opening of the railway was a factor in their decision to move home were also asked to provide the postcode of both their former and current home. In total 57 respondents answered these questions. Of these 79% (n=46) had moved to or within the Scottish Borders and 14% (n=7) had moved to or within Midlothian. Amongst those moving to or within the Scottish Borders, 15% (n=7) had moved from elsewhere in the Scottish Borders and 85% (n=39) had moved from locations outside of the Scottish Borders (the largest proportion of which moved from Edinburgh (26%, n=10) followed by Midlothian (13%, n=5)).

All of those who had moved to Midlothian (n=7) had moved from locations outside of Midlothian, with the largest number moving from Edinburgh (n=3) with one respondent each moving from Glasgow, Angus, the Scottish Borders and overseas. However, it is noted that the sample size for respondents moving to Midlothian is small and therefore it is difficult to draw firm conclusions.

Figure 4.15 shows the home location of those respondents who provided their current postcode and stated that they 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 in their decision to move and those who said it had not been a factor. The map suggests that there has been a relatively high rate of movement in the Tweedbank and Galashiels areas. However, the sample sizes for this question are relatively small which could affect the reliability of the results.

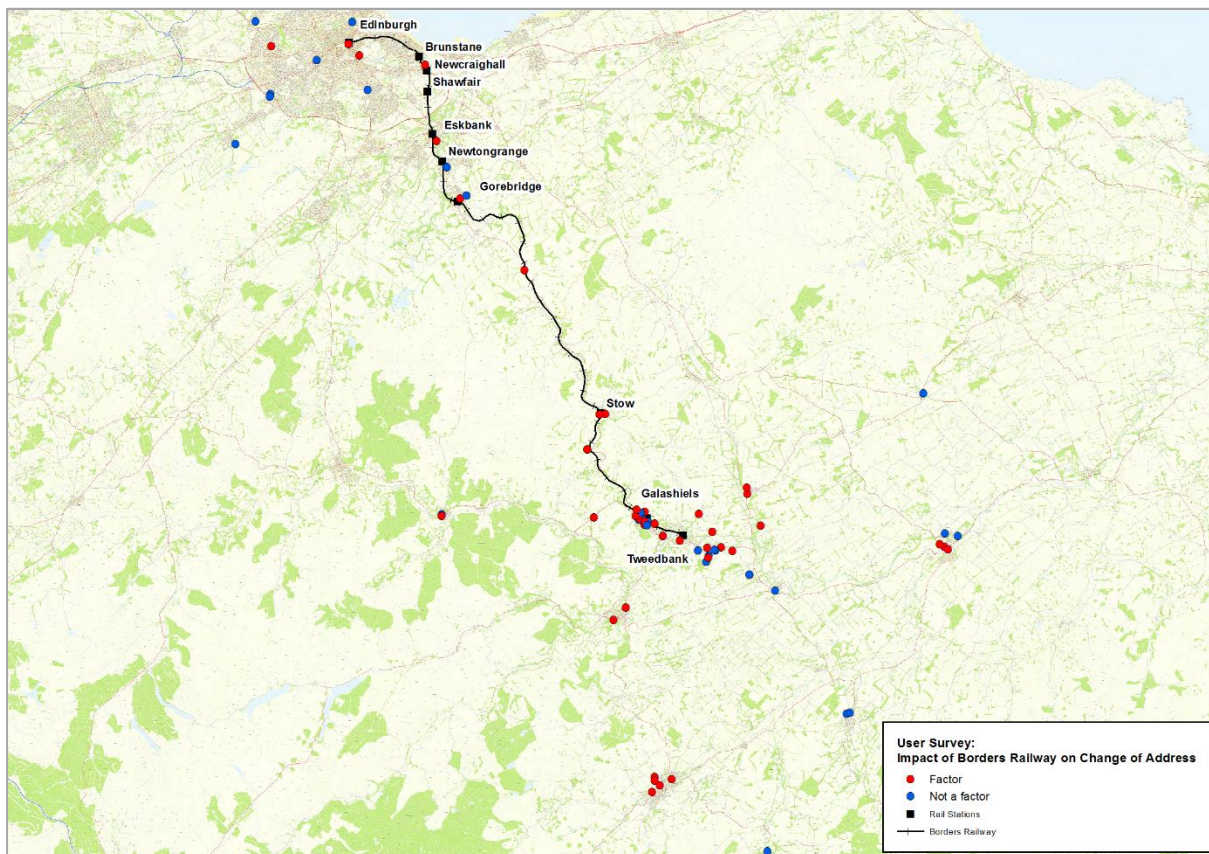


Figure 4.15: Current home location of those who have moved home since the re-opening of the Borders Railway

Respondents who had moved home (n=114) were also asked whether they would have moved to their current location had the Borders Railway not been re-opened. Some 29% (n=33) stated that they **would not have moved** to their current address if the railway had not re-opened. This compares with Year 1, where 32% (n=30) stated that they would not have moved to their current address if the line had not re-opened, a slightly smaller proportion agreed with this statement in Year 2.

The proportion stating that they would not have moved was higher amongst Scottish Borders residents compared to Midlothian and Edinburgh, however, the sample sizes for this question for both Midlothian and Edinburgh were very small and therefore conclusions cannot be drawn from this.

Key Point:

The results suggest that the Borders Railway has affected people's residential choices. Of those identified in the sample who had moved address since the re-opening of the line, over half reported that the railway was a factor in determining their current address. The data also suggests that there has been in-migration into both the Scottish and Midlothian from surrounding areas, with the largest proportions moving from Edinburgh. However, it is noted that the sample sizes for this question, particularly for those moving to Midlothian are very small. The proportion who stated that the line had been a factor in their decision to move was slightly lower in Year 2 compared to Year 1, although the difference is marginal.

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

In total, 15% (n=99) of respondents to the User Survey from Edinburgh, Midlothian or the Scottish Borders had changed workplace since the re-opening of the railway. Of these, 52% (n=52) stated that the re-opening of the Borders Railway **was a factor** in their decision to move workplace (with one respondent who did not answer the question regarding the railway being a factor) while 46% (n=46) said that the line had **not been a factor**.

Overall, 6% of respondents to the Year 1 Survey from Edinburgh, Midlothian and the Scottish Borders had changed workplace since the re-opening of the railway. As shown in the figure below, the proportion of respondents stating that the line was the main factor was considerably lower in Year 2 (18%, n=18) compared to Year 1 (53%, n=24) while the proportion stating that it was not a factor in Year 2 (46%, n=46) was considerably higher compared to Year 1 (9%, n=4). Even so, around 50% of these Year 2 respondents did recognise that the re-opening of the line was a factor to a greater or lesser extent in their change of employment.

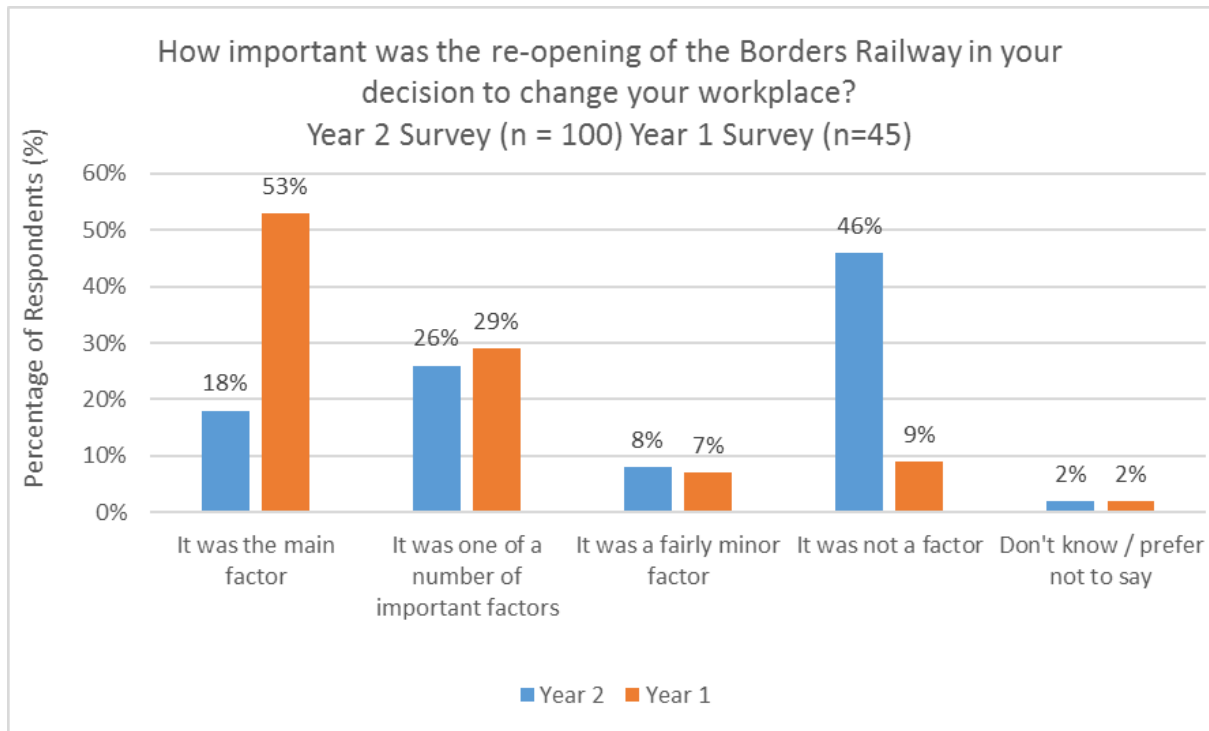


Figure 4.16: Importance of the Borders Railway in respondents' decision to move workplace

Respondents were also asked whether the number of hours they work had changed as a result of the re-opening of the line. As shown in Figure 4.17, the majority of respondents (55%, n=350) reported that the railway had made no impact on the number of hours they work, with 9% (n=59) stating that they now work more hours and 3% (n=18) stating that they now worked fewer hours.

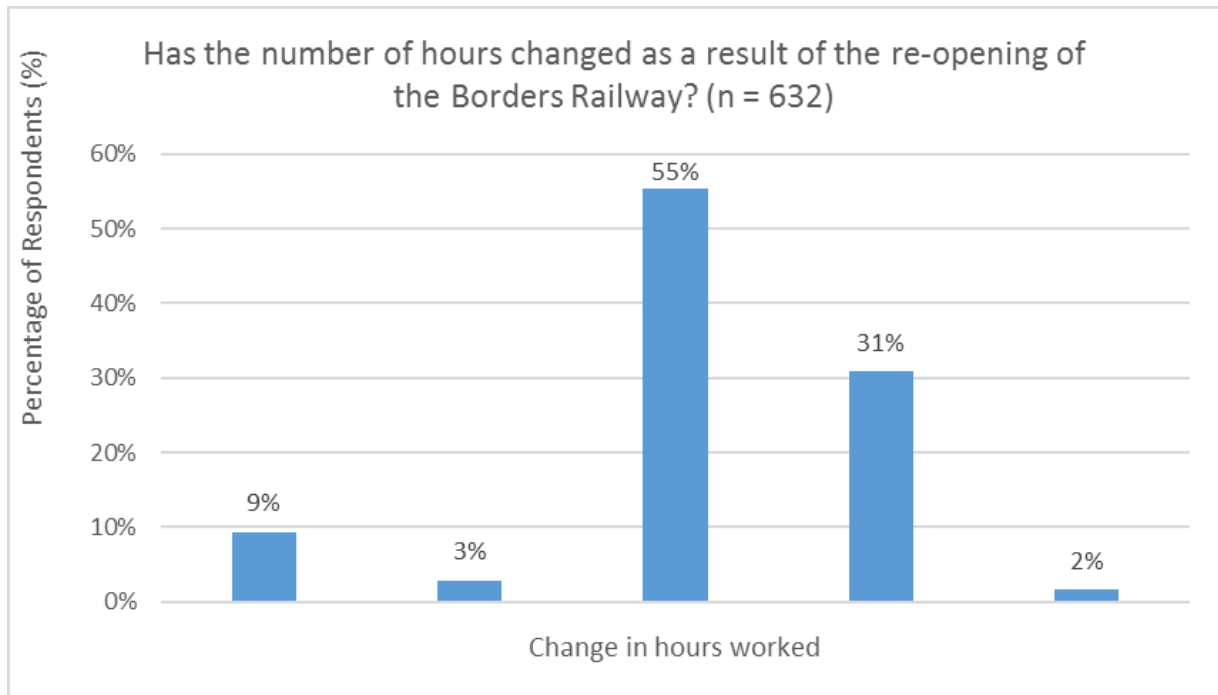


Figure 4.17: Impact of the Borders Railway on the number of hours worked by respondents

Key Point:

*There is evidence that the Borders Railway has had an impact on people’s choice of workplace with 18% of those who moved employment stating that the re-opening of the line had been the **main factor** in their decision. Overall, the results suggest that there has also been a modest impact on the number of hours worked in terms of working more and fewer hours.*

Investment Objective 3 Summary

Prevent decline in the Borders population by securing ready access to Edinburgh’s labour market

Overall, the results of the research suggest that the Borders Railway is achieving Objective 3. As discussed above, commuting is the most common journey purpose and Edinburgh is the most frequent destination, suggesting that the line has secured access to employment opportunities in the capital for residents of the Scottish Borders and Midlothian. The results also suggest that the improved access opportunities associated with the rail line have influenced people’s residential choices and encouraged in-migration to both Midlothian and the Scottish Borders. There is evidence that the Borders Railway has had an impact on people’s choice of workplace with nearly a fifth of those who moved employment stating that the re-opening of the line had been the main factor in their decision. Overall, the impact on the number of hours worked is small.

Objective 4: 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?

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

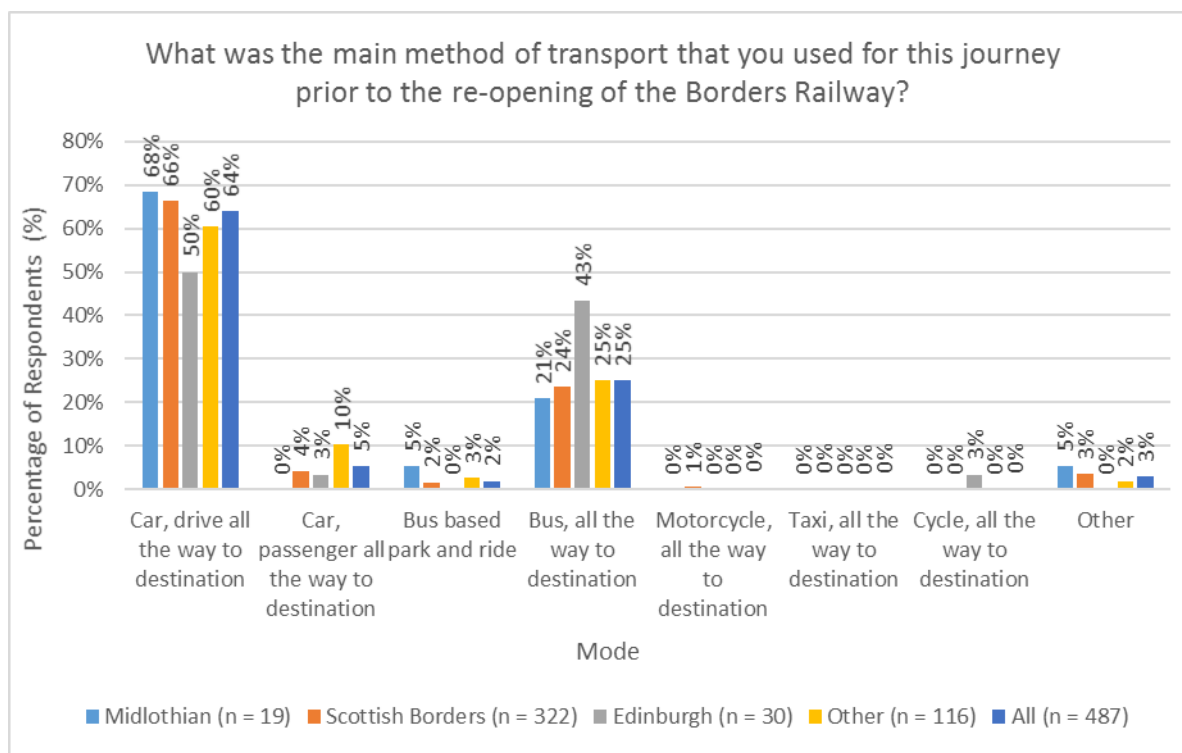


Figure 4.18: Main method of transport used by respondents to the User Survey for their current trip prior to the re-opening of the Borders Railway

The results from the Year 2 Survey were broadly comparable to those from the Year 1 Survey for this question.

The frequency with which each respondent indicated they made their current trip was used to estimate the number of annual single trips associated with respondents' previous journeys using the conversion factors in Appendix B. Using this approach, it is estimated that based on the data from the Year 2 sample alone approximately 36,000 single car trips and 14,000 bus trips per year have been shifted to rail (see Table 4.3). It is noted 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.

Table 4.3: Mode used by respondents for current trip prior to the re-opening of the railway and associated number of annual single trips

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	312	64%	35,794	64%
Car, passenger all the way to destination	26	5%	1,868	3%
Bus based park and ride	9	2%	850	2%
Bus, all the way to destination	122	25%	14,114	25%
Other	18	4%	3,216	6%
Total	487		55,842	

In total, the above figures suggest that the railway has resulted in approximately 36,000 ‘saved’ car trips per annum. Whilst some of these saved car trips will be offset by the 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 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 Plan⁸), reductions in congestion and improvements in local air quality.

Overall, 31% (n=250) of respondents to the question 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 35,900 annual single trips on the railway, or approximately 35% of those recorded via the sample, would not therefore have been undertaken had the Borders Railway not been in place, underlining the point that people are using the line to take up new opportunities.

Key Point:

The re-opening of the Borders Railway has resulted in significant modal shift from car to rail, with the majority of respondents (64%) who previously made their trip by another mode stating that they drove all the way to their destination. Based on the

⁸ Climate Change Delivery Plan: Meeting Scotland’s Statutory Climate Change Targets, 2009, Scottish Government, <http://www.gov.scot/Resource/Doc/276273/0082934.pdf>, accessed 11/10/2017

journey frequency of this group, this equates to an estimated 36,000 saved annual single car trips from the sample alone.

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

As well as generating modal shift from car to rail, the data also highlights that there has been a shift from bus to rail with 25% of the sample stating that they previously made their current journey by bus equating to approximately 14,100 annual single trips.

How do users get to the station?

Figure 4.19 shows the main method of transport used by respondents travelling from the Scottish Borders and Midlothian whilst Figure 4.20 shows the same data weighted by frequency with which respondents make their current trip.

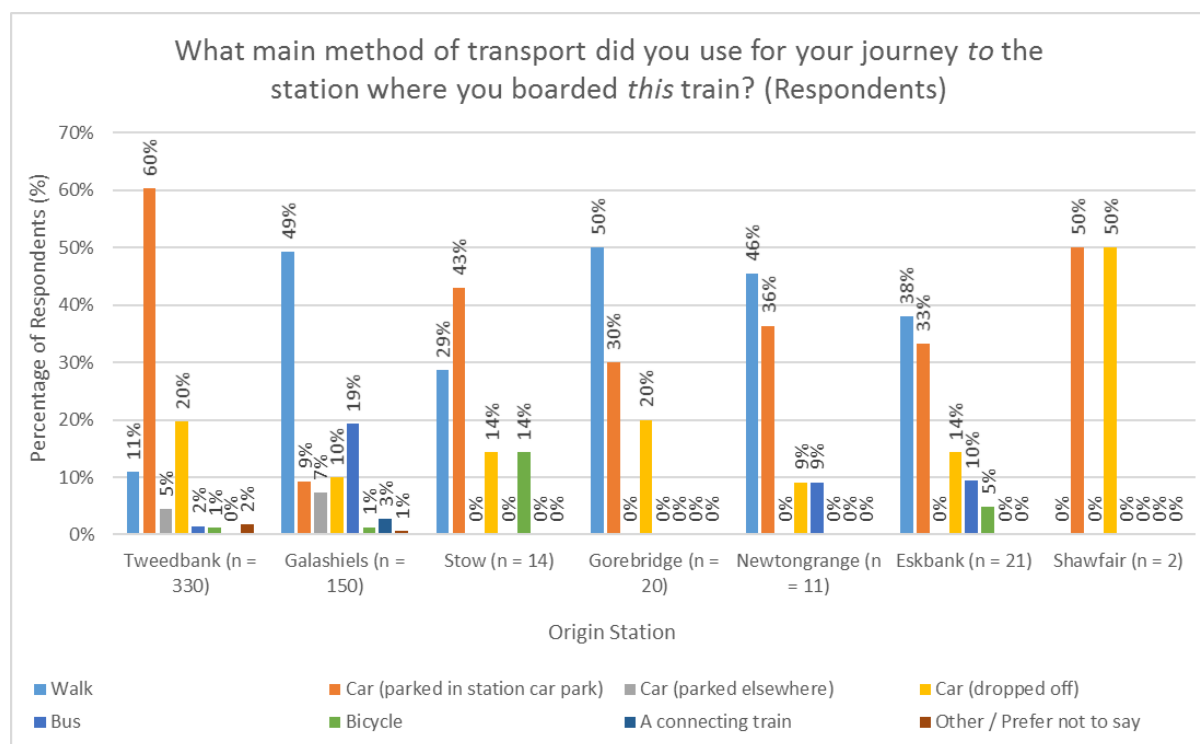


Figure 4.19: Main method of transport used to access origin train station (respondents)

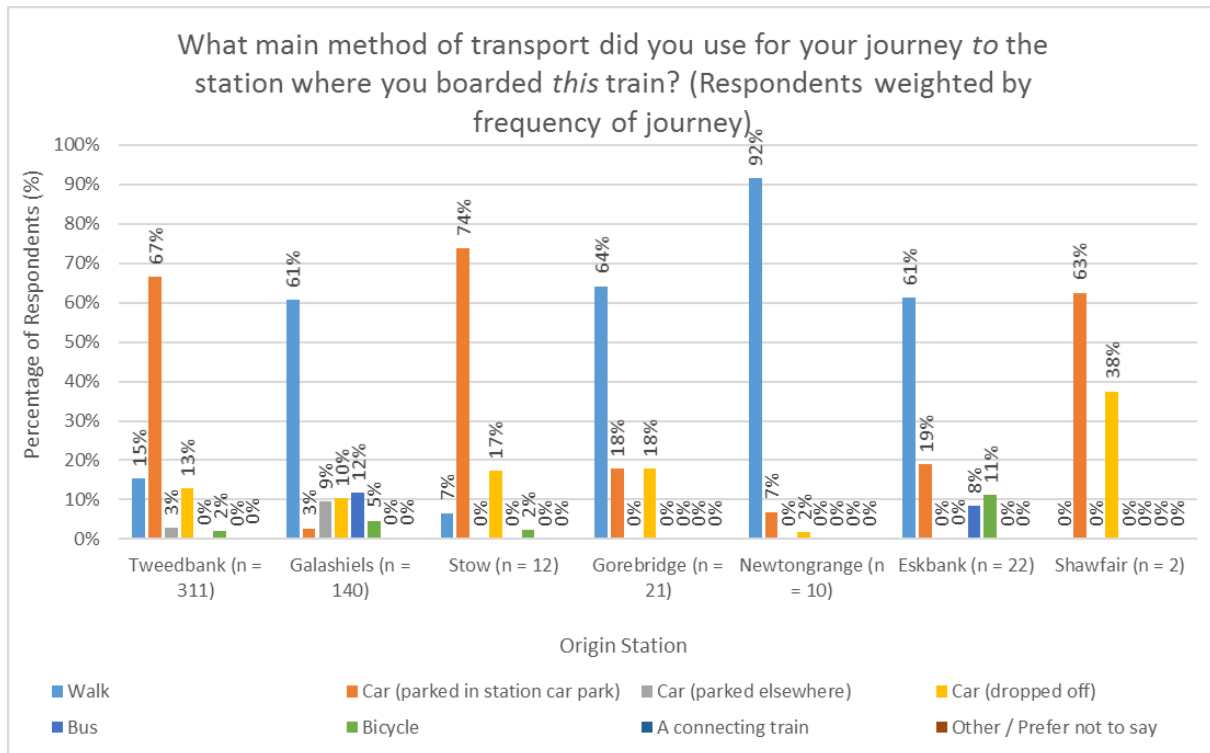


Figure 4.20: Main method of transport used to access origin station (respondents weighted by frequency of journey)

These figures highlight that **driving and parking at the station** is the most common method of transport for those taking the train from Tweedbank station with 60% (n=199) of respondents travelling from Tweedbank Station using this method, equating to approximately 67% (n=20,054) of the journeys for which a mode was provided. Conversely, **walking** is the most common method of transport for those boarding the train at Galashiels, Gorebridge, Newtongrange and Eskbank (49%, 50%, 46% and 38% respectively). In terms of **bus** travel, those taking the train from Galashiels had the highest proportion of bus usage for getting to the station (19%, n=29), equivalent to 12% (n=2,608) of annual single journeys. However, it is worth noting that the sample sizes for all stations except Tweedbank and Galashiels are relatively small which may impact the reliability of the results.

It is notable that a proportion of users of Galashiels Station state that they park their car, either at the station (9%, n=14) or elsewhere (7%, n=11). There is no dedicated station car park at Galashiels Station as the station was focused towards capturing more local trips. However, despite the lack of dedicated car park, it is evident that some users are electing to drive to the station and are likely using nearby car parks.

The above data is broadly comparable to the results from the Year 1 Survey. However, the proportion of respondents using active travel modes is slightly higher in the Year 2 Survey compared to the Year 1 Survey (see Table 4.4 below). This is likely a result of the time period when the surveys were completed, with the Year 1 Survey undertaken during November and the Year 2 Survey completed in August and September.

Table 4.4: Year 1 and Year 2 main method of transport used to access origin station (respondents)

Mode	Year 1 (November)	Year 2 (August – September)
Walk	26%	31%
Bicycle	1%	2%

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 being the most common mode of travel to Galashiels, Gorebridge, Newtongrange and Eskbank. Overall, the highest proportion of bus share is at Galashiels, with bus travel accounting for relatively few journeys to the other stations. It is notable that a proportion of users of Galashiels Station park their car near the station despite the lack of dedicated car park. Overall, the proportion of trips made using active travel modes is higher in Year 2 compared to Year 1. This is likely a result of the time period when the surveys were completed, with the Year 1 Survey undertaken during November and the Year 2 Survey completed in August and September.

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

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

Key Point:

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

Investment Objective 4 Summary

Create modal shift from the car to public transport

Overall, the results of the research suggest that the Borders Railway is achieving Objective 4. The responses to the User Survey suggest that there has been a significant modal shift from car to rail, with the majority of respondents (64%) who previously made their trip by another mode stating that they drove all the way to their destination equating to an estimated 36,000 saved annual single car trips from the sample alone. 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 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. While slightly outside of the scope of the objective, it is also worth noting that as well as generating modal shift from car to rail, there has also been a shift from bus to rail with 25% of the sample stating that they previously made their current journey by bus equating to an estimated 14,100 trips.

5 Visitor Survey

Overview

As discussed above, a key aim of this research was to record details of visitors using the Borders Railway during the summer peak and, in so doing, provide greater clarity on the overall tourism impact of the new line. In order to identify the responses to the User Survey provided by visitors, respondents were asked to indicate whether their current trip was

- a leisure day trip to Midlothian and/or the Scottish Borders;
- a leisure day trip to Edinburgh;
- a short or long overnight trip to Midlothian and/or the Scottish Borders;
- a short or long overnight trip to Edinburgh; or
- None of the above.

This Chapter focuses on the respondents who selected the first four of the above options. A demographic breakdown of responses received by this group is included in Appendix D. 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?
- What attracted visitors to make their current trip?
- 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?
- How did visitors rate their trip as a whole?
- Have the tourist sites consulted seen an increase in tourist numbers and are there any barriers which prevent visitors to the sites from using the service?

What proportion of user of the Borders Railway are tourists?

Overall, 60% (n=496) of all respondents to the Year 2 Survey indicated that the purpose of their journey on the train was either a day trip or an overnight stay in the Scottish Borders, Midlothian or Edinburgh and therefore are considered tourists. When frequency of trip is taken into consideration this equates to 30% of annual single trips recorded via the sample. As would be expected given the timing of the surveys, this proportion is far higher than that recorded during the Year 1 Survey where visitors accounted for 39% (n=436) of respondents and visitor trips accounted for 15% of the annual single trips recorded by the sample.

Of those who reported that they were on either a day trip or an overnight stay, the majority were on day trips (87%, n=433) whilst 13%(n=63) said that their trip included an overnight stay. As shown in Figure 5.1, the largest proportion of respondents to the Year 2 survey stated that they were making a day trip to Edinburgh (55%, n=273). In total, 59% (n=293) were travelling to Edinburgh and

41% (n=203) were travelling to the Scottish Borders or Midlothian. The proportions are broadly comparable to the Year 1 Survey although there is a slightly higher proportion of day trips to Midlothian and the Scottish Borders (32% compared to 25%) and a smaller proportion of overnight trips to Edinburgh (4% compared to 9%).

Of the 203 respondents travelling to the Scottish Borders or Midlothian, approximately 8% (n=17) were travelling to Midlothian (accounting for 3% of the overall visitor sample). Given the relatively small size of the Midlothian sample, breaking down the results by local authority would be unreliable and therefore, for the remainder of this chapter, the data for visitors to Scottish Borders and Midlothian is reported together.

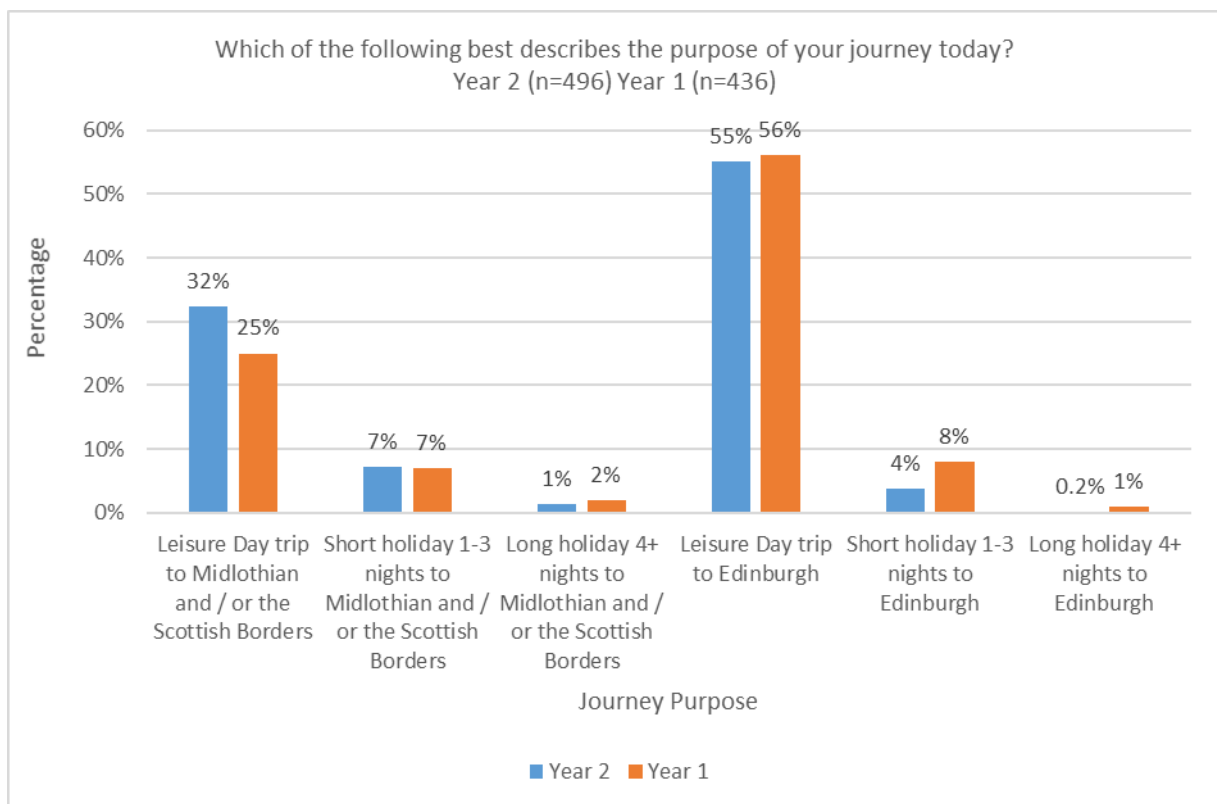


Figure 5.1: Journey purpose (day trips and overnight stays)

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).

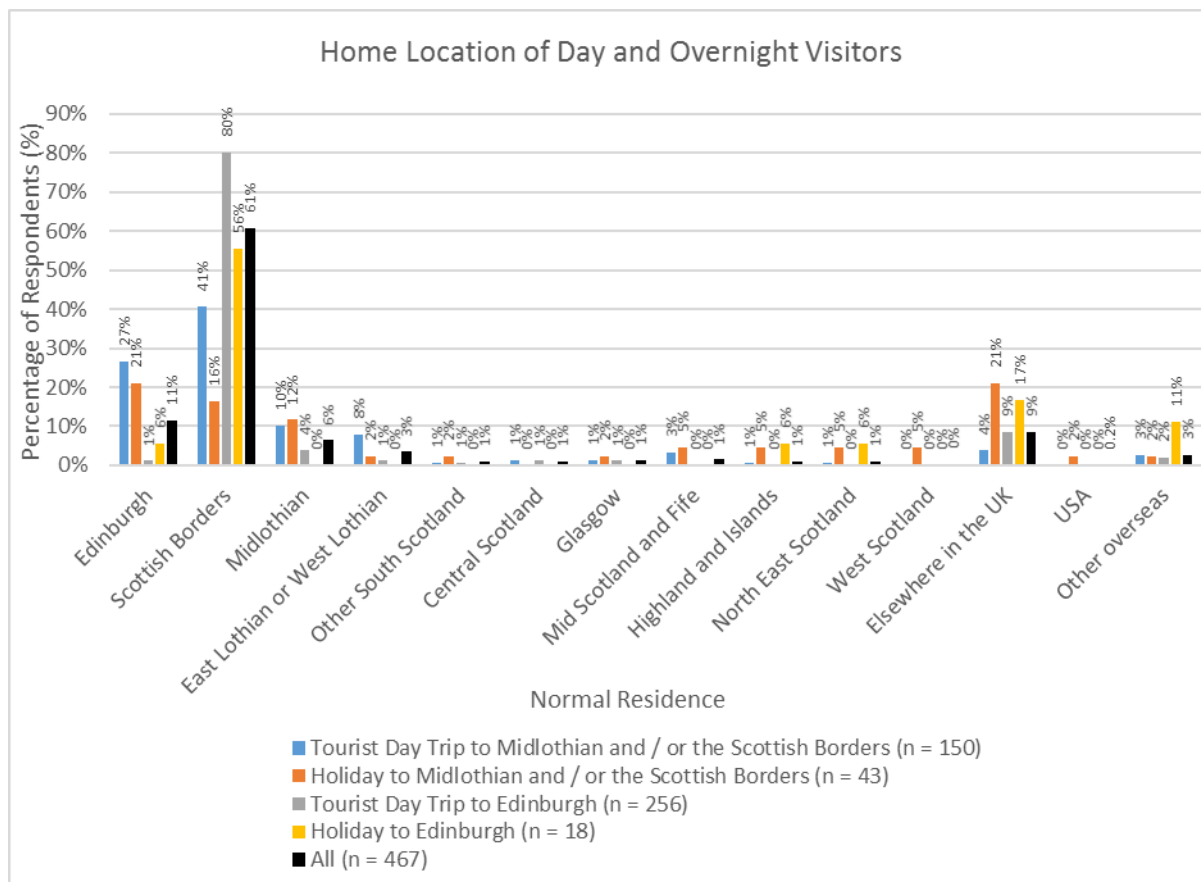


Figure 5.2: Home location of respondents who identified themselves as day and overnight visitors

Overall, 89% (n=414) of visitors who provided their home location were residents of Scotland, with 61% (n=283) living in the Scottish Borders, 11% (n=53) living in Edinburgh, and 6% (n=30) living in Midlothian. A further 9% (n=40) came from elsewhere in the UK and 0.2% (n=1) came from the USA. Overall, 3% (n=12) selected ‘other overseas’, with responses including South Africa, Belgium, Italy, Switzerland, Australia, New Zealand, Spain, Canada, and Venezuela. While the number of overseas visitors appears small compared to the proportion coming from the UK, international visitors are a key market for tourism in Scotland.

Key Point:

Visitors accounted for 60% of respondents to the User Survey. The majority (89%) of these came from Scotland with the largest proportion from the Scottish Borders. There were also smaller numbers of visitors from elsewhere in the UK as well as the USA and a number of other overseas countries. Whilst the majority of visitor trips were to Edinburgh, there were also a considerable number of trips made to the Scottish Borders.

What attracted visitors to make their current trip?

Figure 5.3 shows the reasons respondents provided for making their current trip. It is noted that respondents were able to tick more than one box. Overall, the most

popular response was to visit family and friends with 39% (n=45) of respondents selecting this option. In total 6% (n=7) selected 'to experience the Borders Railway'. As shown below, a similar proportion of respondents ticked the other options.

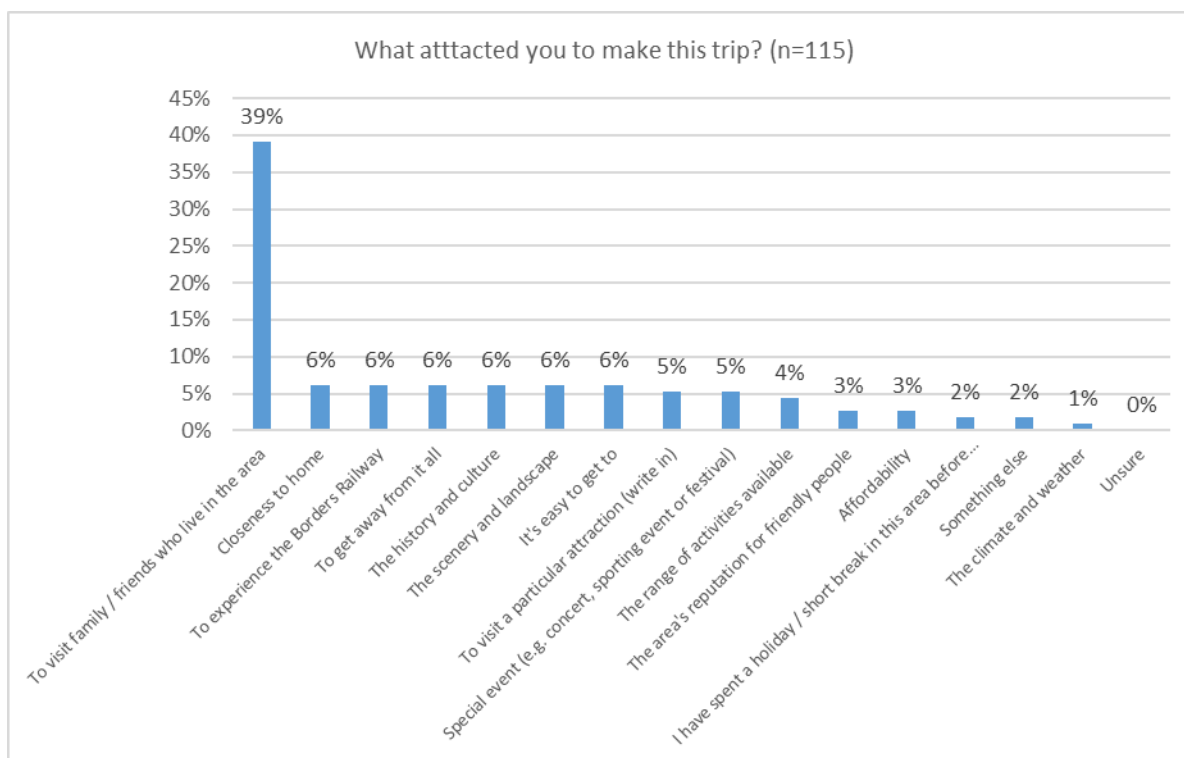


Figure 5.3: What attracted visitors to make their current trip?

Key Point:

Visiting family and friends was the most popular reason given by visitors for making their current trip with 39% of respondents ticking this option.

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**. Amongst those who responded to this question (n=471), 71% (n=333) said that the Borders Railway **had been a factor** in their decision to make their current trip, with 32% (n=150) stating it was the **main factor**, 29% (n=136) stating it was **one of a number of factors**, and 10% (n=47) stating it was a fairly minor factor (see Figure 5.4).

The overall proportion of respondents stating that the line was a factor in their decision to make their trip was higher in Year 2 (71%, n=333) compared to Year 1 (67%, n=276). However, a smaller proportion of Year 2 respondents (29%, n=136) said the line was the main factor compared to Year 1 respondents (35%, n=144).

As shown in the figure below, 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.

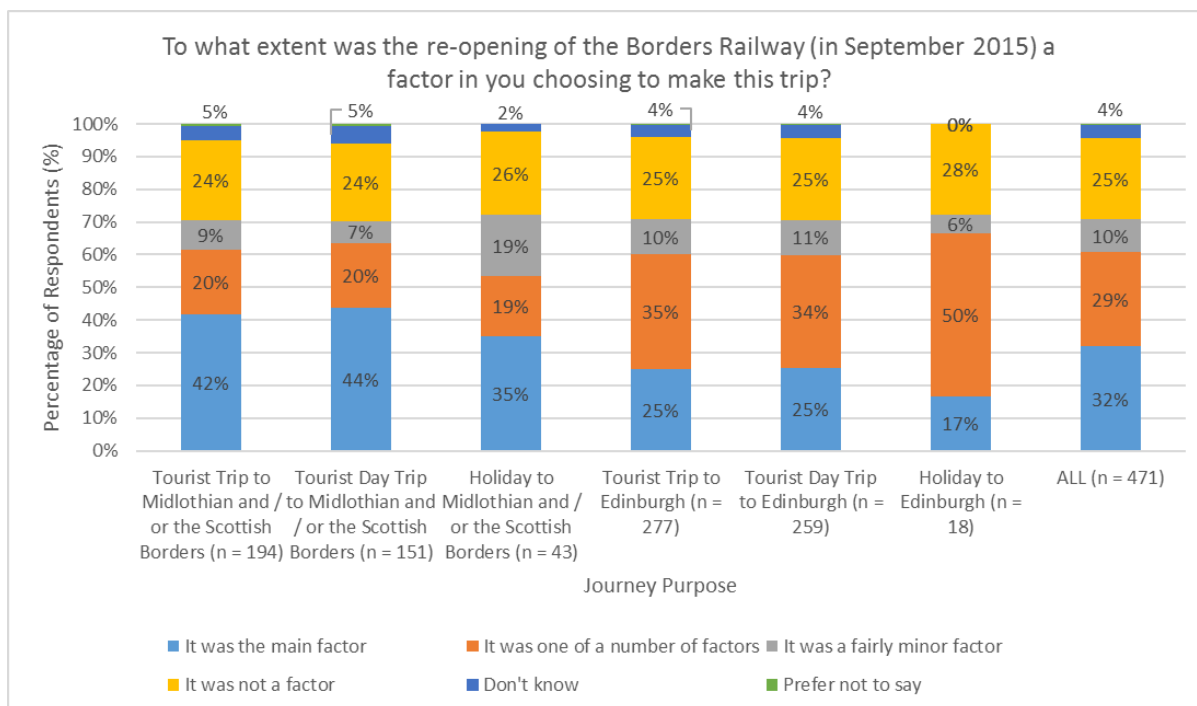


Figure 5.4: The importance of the Borders Railway in respondents' decision to make their current trip

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=468), 25% (n=119) said they **would not have** made the trip. This is slightly higher than the equivalent Year 1 figure (23%, n=98).

As shown in the Figure 5.5 below, the proportion of those selecting this option was slightly higher amongst those visiting Midlothian and / or the Scottish Borders (27%, n=51) compared to those visiting Edinburgh (25%, n=68), with the highest proportion being amongst day trippers to Midlothian and / or the Scottish Borders (28%, n=41). This pattern is broadly comparable with the Year 1 figures.

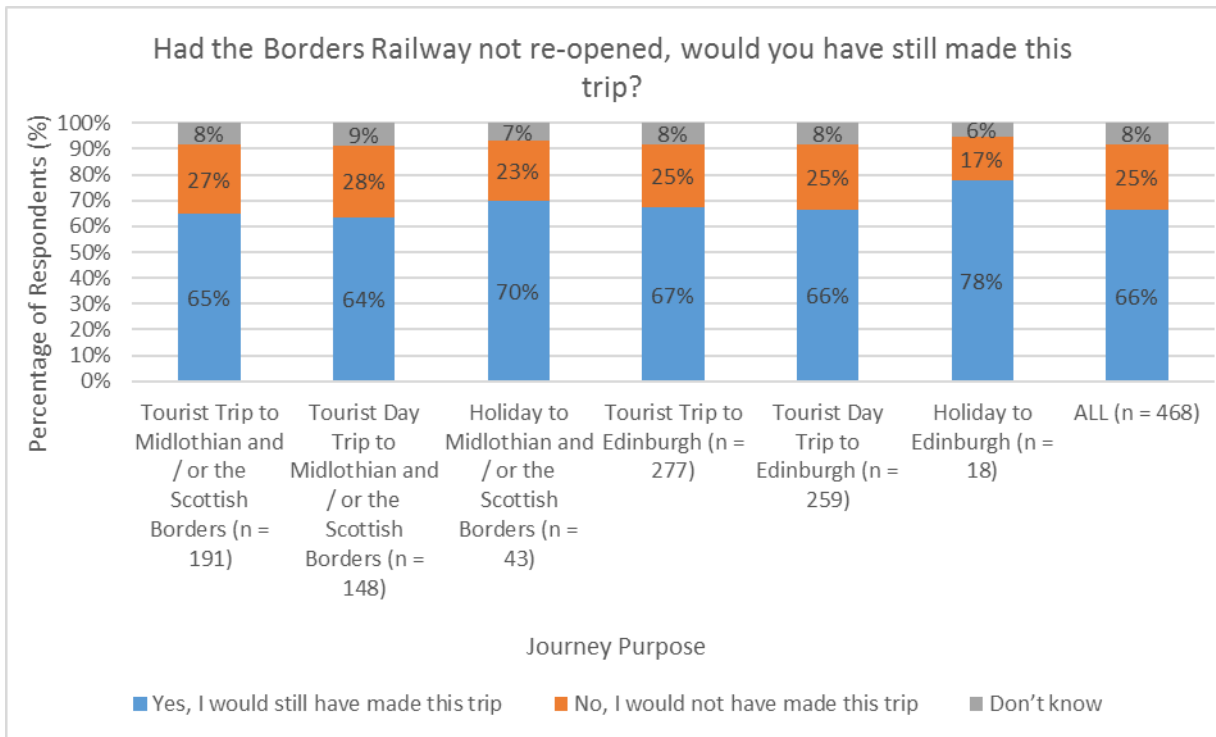


Figure 5.5: Likelihood of respondent making trip if the Borders Railway had not re-opened

Those respondents who indicated that they would not have made the trip if the Borders Railway not re-opened were asked what they would have done otherwise. Of those who responded to this question (n=117), the majority (47%, n=55) reported that they would have **stayed at home** (see Figure 5.6 below).

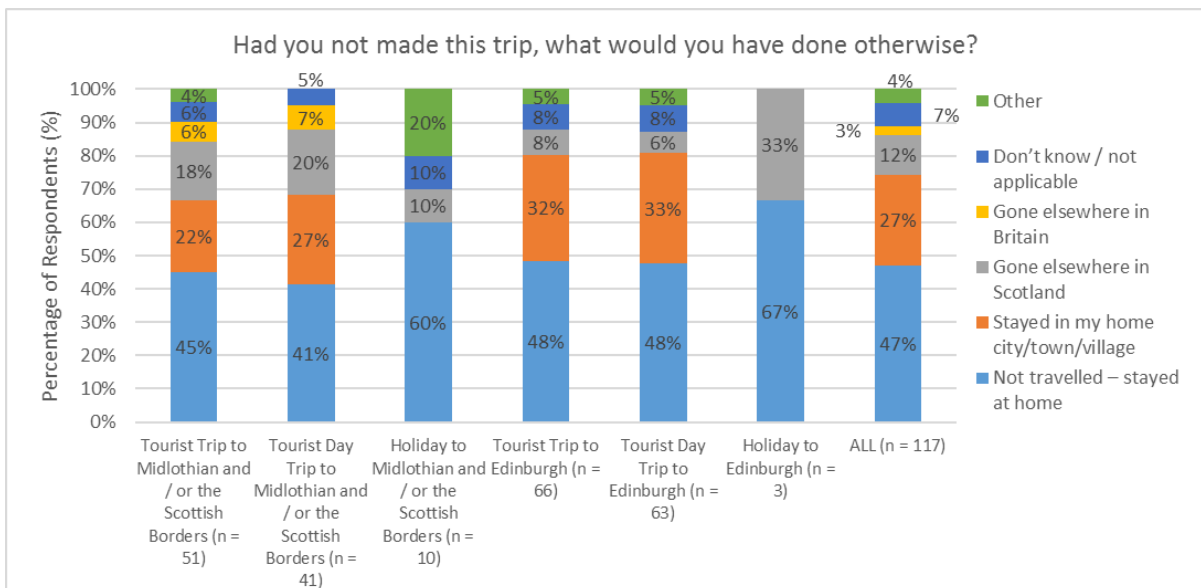


Figure 5.6: Activity undertaken if the respondent had not made current trip

Key Point:

Overall, the data suggests that the re-opening of the Borders Railway is a relatively important factor in people's decision to make tourism trips with over 70% of respondents to the question stating that it was a factor in their decision to make their journey and 25% stating that they would not have made their trip were it not for the railway line. These figures are slightly higher than the equivalent Year 1 figures (65% and 23% respectively).

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

The tourists who indicated that they were making an overnight stay (13%, n=63) were also asked to provide **details of the accommodation** which would be / had been used during their visit (see Figure 5.7 below).

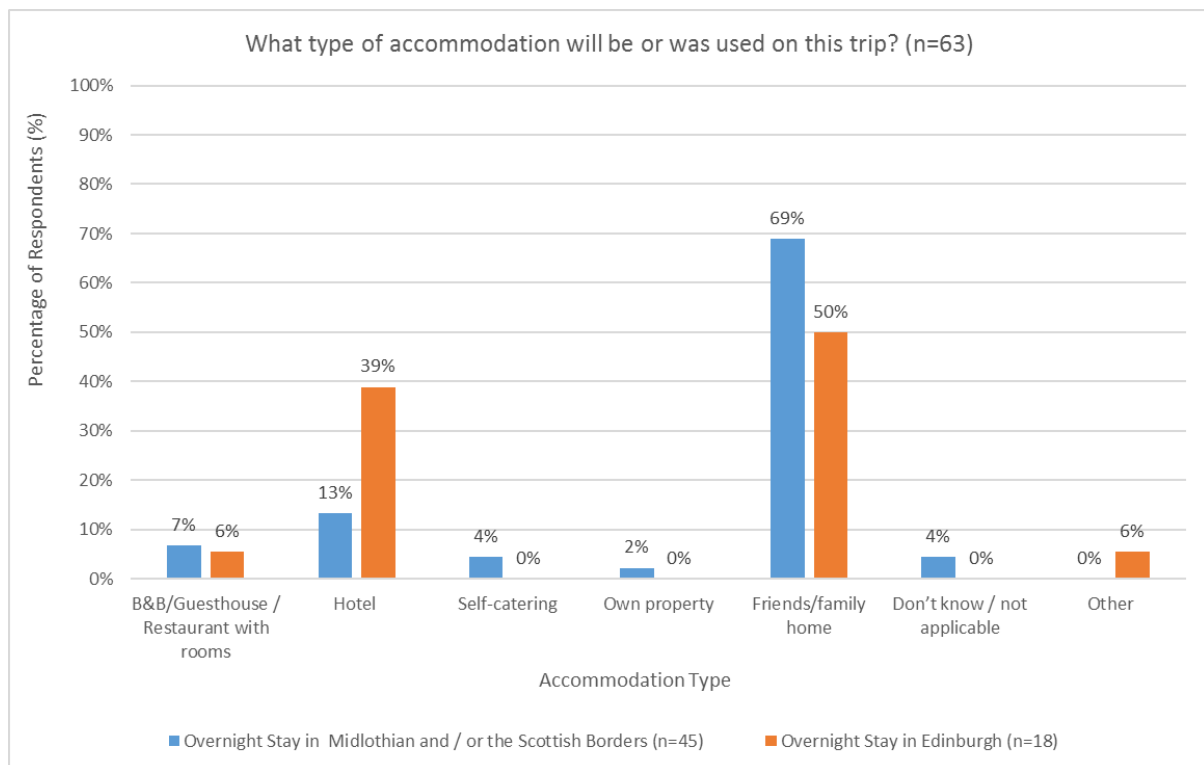


Figure 5.7: Accommodation type used for overnight stays by trip destination

For those staying in Edinburgh, the most common accommodation choice was staying with friends and / or family (50%, n=9) followed by staying in an hotel (39%, n=7). Amongst those staying in Midlothian and / or the Scottish Borders, staying with friends and / or family was again the most popular option (71%, n=30) followed by staying in an hotel (10%, n=4). It is noted, however, that the sample sizes for all options are relatively small, particularly for those visiting Edinburgh.

The Year 2 data is broadly similar to the Year 1 data. However, hotels were the most popular accommodation amongst Edinburgh visitors in the Year 1 Survey, with

visiting family and friends the second most popular option. This difference may be a result of the likely higher cost of accommodation at the time of the Year 2 Survey, taking place during the Edinburgh Festival.

Figure 5.8 below shows the **amount spent on accommodation** by those making overnight trips. This highlights that the majority (56%, n=35) did not pay for accommodation with the proportion who did not pay higher for those visiting Midlothian and / or the Scottish Borders (58%, n=25) compared to those visiting Edinburgh (53%, n=10). In the main those staying in Edinburgh were paying more for their accommodation than those staying within the Scottish Borders and / or Midlothian.

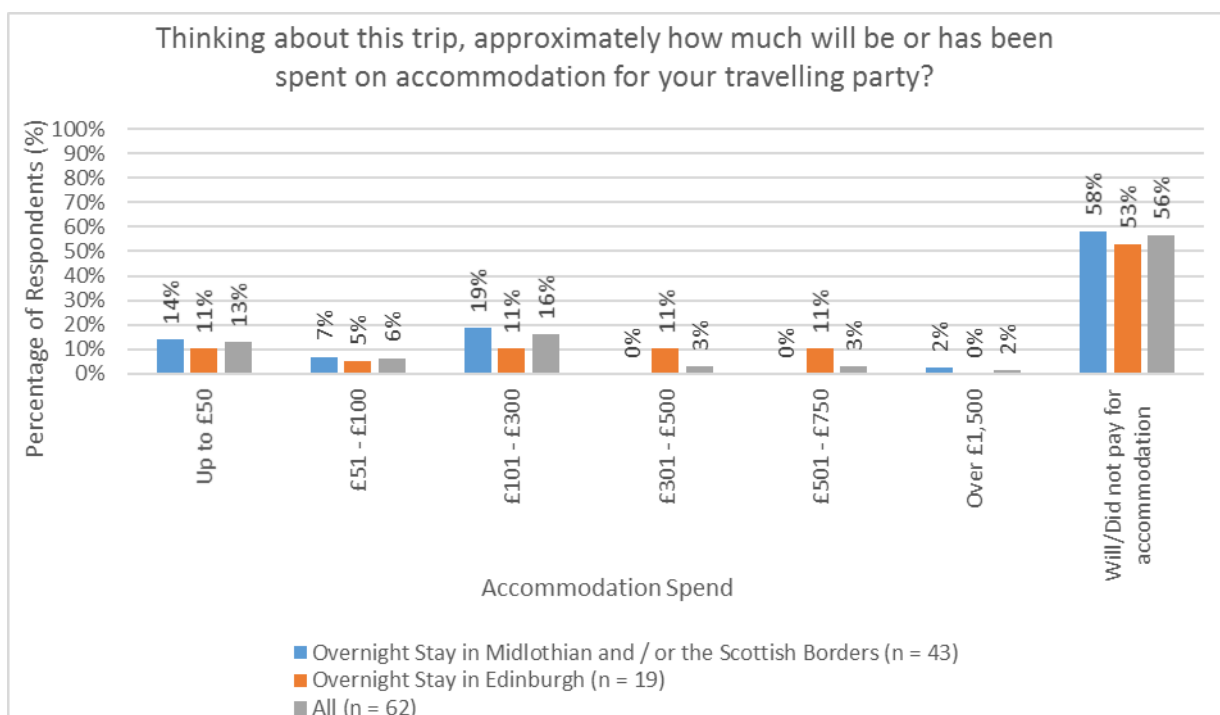


Figure 5.8: Approximate amount spent on overnight accommodation by those making overnight trips by trip destination

Key Point:

Staying with friends and / or family was the most common accommodation type amongst visitors to both Edinburgh and Midlothian / the Scottish Borders with a slightly higher proportion of visitors to the latter choosing this option. 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 5.9 overleaf shows the **activities undertaken** by tourist day trippers and those on overnight stays during their trip.

Overall, shopping was by far the most popular choice of activity with 27% (n=239) of those who answered the 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.

Amongst those visiting Edinburgh, the next most popular activity was attending a music concert / theatre / art festival reflecting the fact that the Edinburgh Fringe Festival was on at the time of the survey. Amongst visitors to Scottish Borders / Midlothian, walking was the next most popular activity.

Where respondents indicated that they had visited a castle, museum, country park or visitor / heritage centre, they were also asked to provide the name of the attraction they visited. Popular sites amongst those visiting Midlothian and / or the Scottish Borders included Abbotsford House, Melrose Abbey and Bowhill House whilst amongst those visiting Edinburgh, Edinburgh Castle, Holyrood Palace, Camera Obscura, the National Gallery and the Botanic Gardens were popular responses.

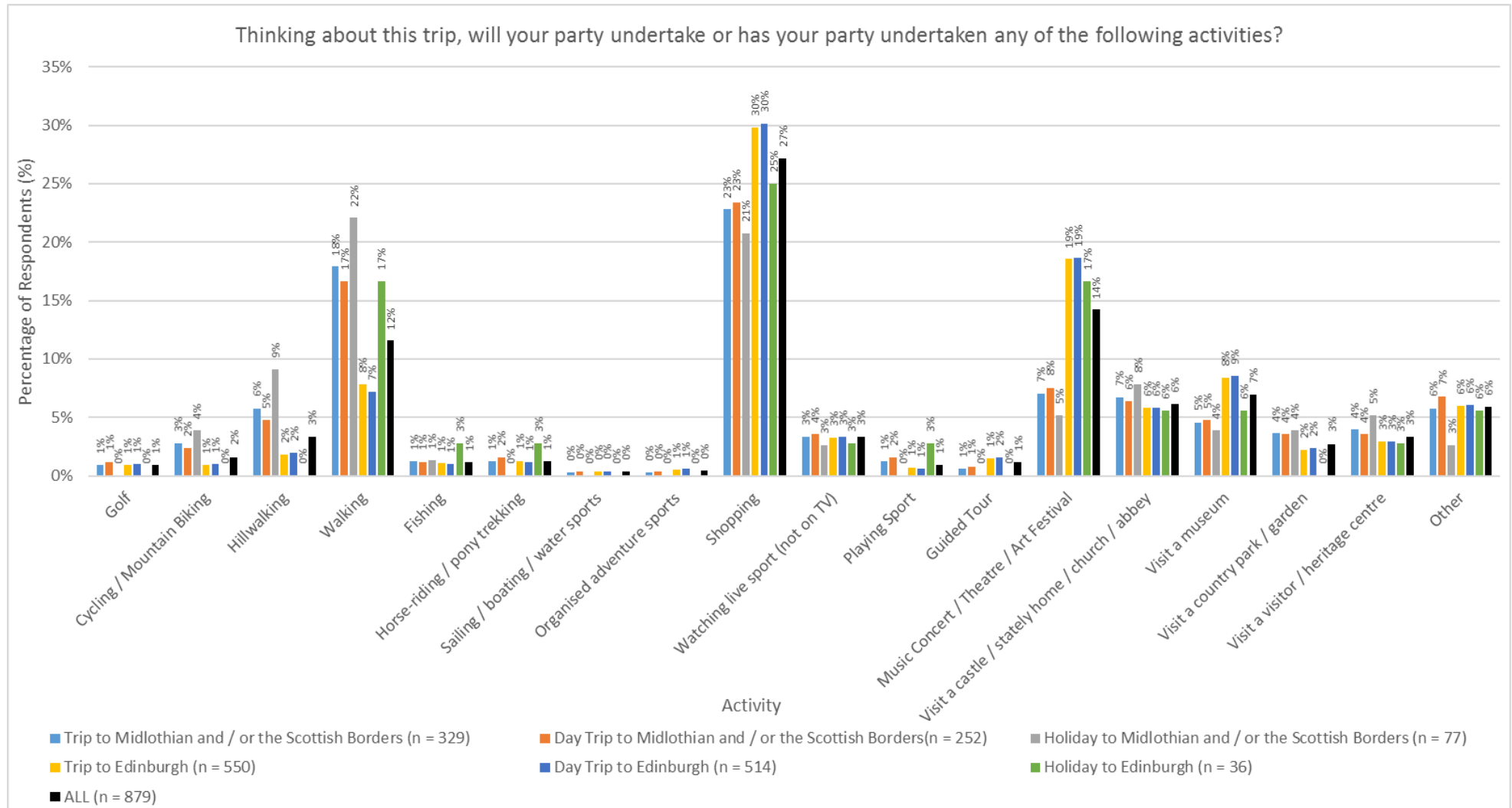


Figure 5.9: Activities undertaken by those making day trips or overnight trips

Figure 5.10 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.

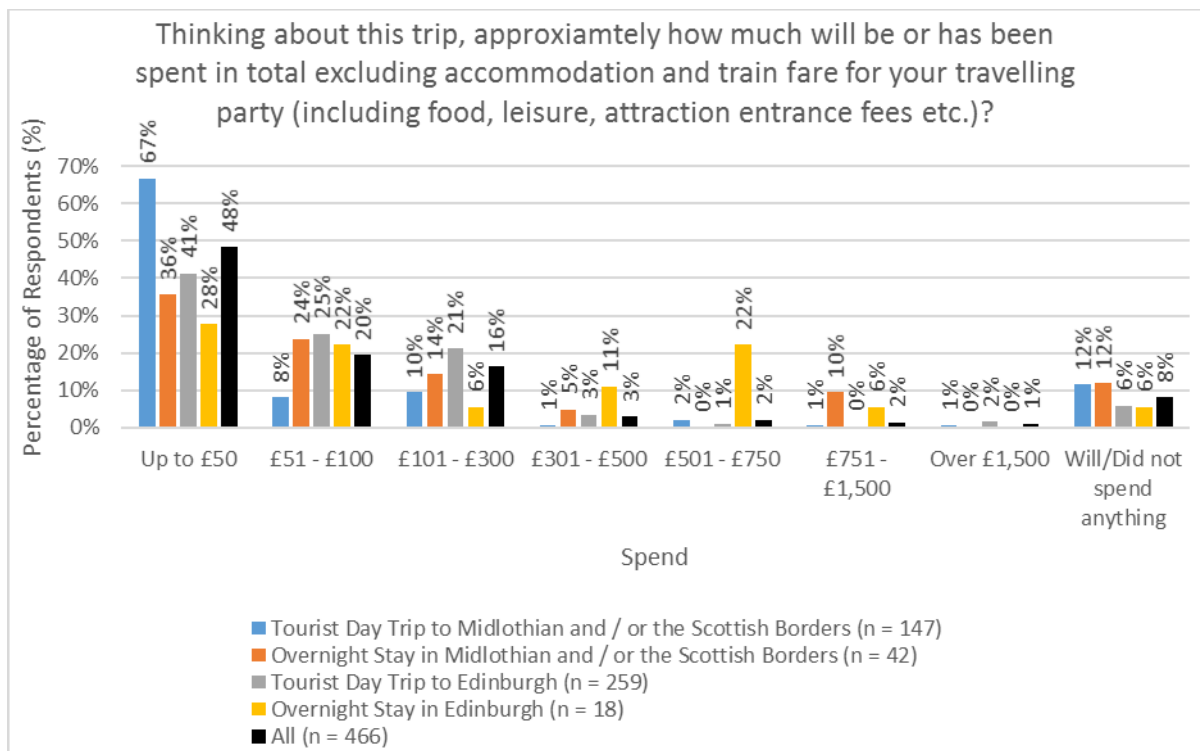


Figure 5.10: Approximate amount spent excluding accommodation and train fare by those making day and overnight trips by trips destination

Key Point:

Respondents undertook a range of activities during their trip with shopping the most commonly cited activity. In terms of specific attraction, amongst those visiting the Scottish Borders / Midlothian, responses included Abbotsford House and Melrose Abbey whilst amongst respondents visiting Edinburgh responses included Edinburgh Castle, the Botanic Gardens and Holyrood Palace.

How did visitors rate their trip as a whole?

As shown in Figure 5.11, the majority of visitors rated their trip as either very good (44%, n=210) or good (36%, n=171), with a further 15% (n=70) stating that they had only just started their trip and therefore could not provide a rating.

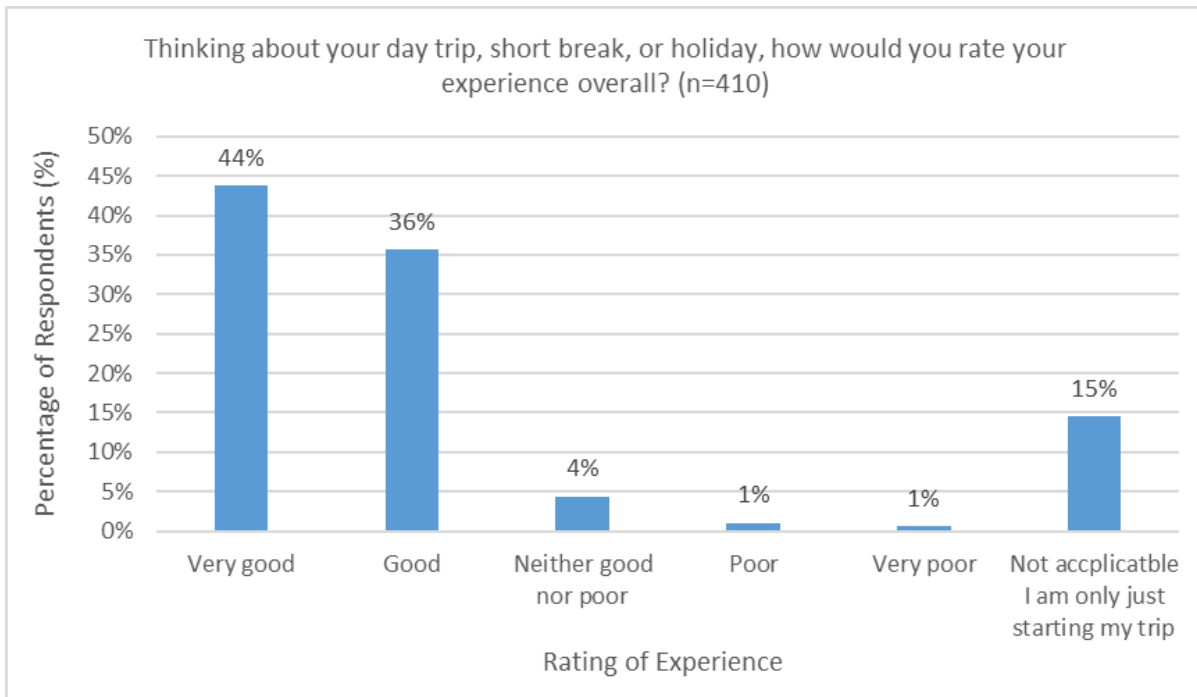


Figure 5.11: Overall Rating of Visitor Trip

Key Point:

The majority of visitors rated their trip as either very good or good.

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, irregular 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 comment on passenger capacity issues before discussing outputs from both the User and Non-User Surveys.

Passenger Capacity

In the first year of the railway’s operation there was a number of reports of passenger capacity issues on the line. In order to establish an accurate picture of these issues, a detailed analysis of ScotRail passenger count data was undertaken. This data was collected during May and August 2017. 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.

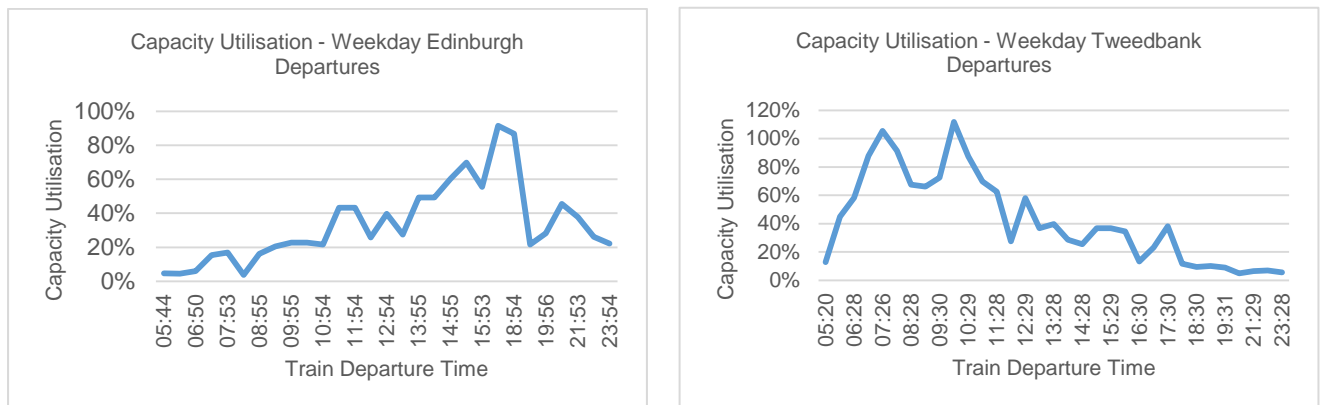


Figure 6.1: Capacity Utilisation – Weekday

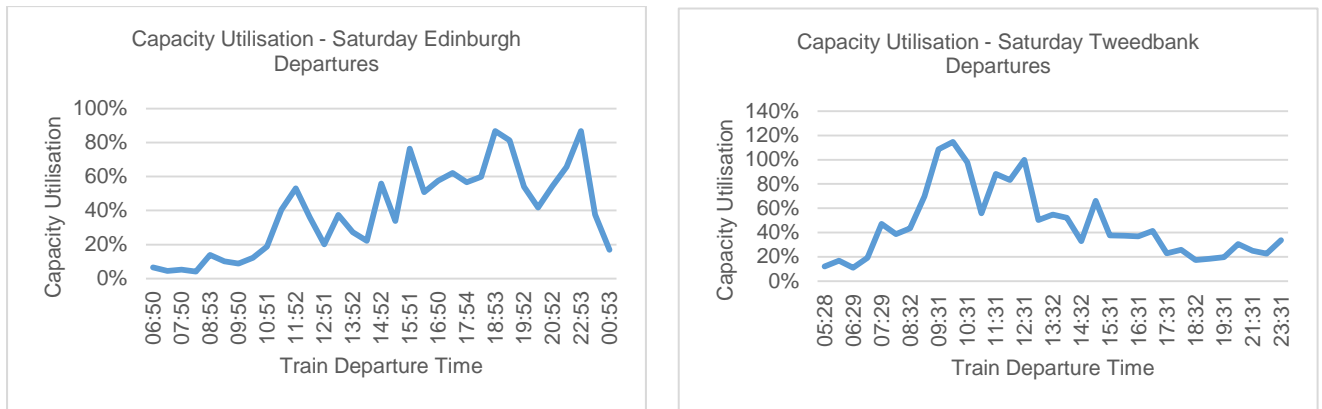


Figure 6.2: Capacity Utilisation – Saturday

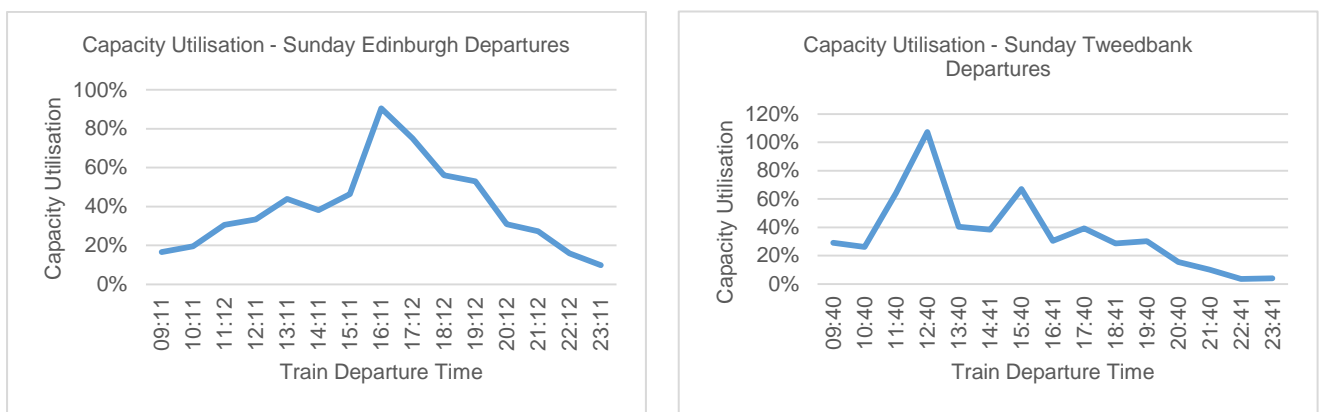


Figure 6.3: Capacity Utilisation - Sunday

Overall, the data suggests that weekends and particularly Saturdays are busier than weekdays, with Saturday recording the highest average capacity and the largest number of trains with a capacity utilisation of over 100%. In addition, capacity utilisation is more of a problem on trains departing Tweedbank, with all services which recorded a capacity utilisation of more than 100% travelling in the Tweedbank – Edinburgh direction.

On Saturday, capacity utilisation was above 100% on the 09:31, 10:01 and 12:31 departures from Tweedbank (109%, 115% and 100% respectively). There were no services in the reverse direction with a capacity utilisation above 100% with the highest utilisation being the 17:54 Edinburgh – Tweedbank departure (87%).

Similarly, on Sunday, there was one service (11:45 departure from Tweedbank) with a capacity utilisation of more than 100% whereas the highest capacity utilisation in the reverse direction was 90% (16:11 departure from Edinburgh)

Based on the weekday data, capacity utilisation was above 100% on the 07:26 Tweedbank departure (112%) and the 09:59 Tweedbank departure (106%). In contrast, the highest capacity utilisation on a weekday travelling in the Edinburgh – Tweedbank direction was the 18:23 departure from Edinburgh (92%).

Key Point:

Available passenger count data suggests that capacity is most problematic on Saturdays and on 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 home location of respondents. Generally, there was a high level of satisfaction with the quality of the service with 39% (n=201) of respondents rating the quality of service as ‘Very Good’ and a further 56% (n=290) reporting that it was ‘Good’. The quality ratings were highest amongst the more infrequent users (i.e. those based overseas and elsewhere in Scotland the UK).

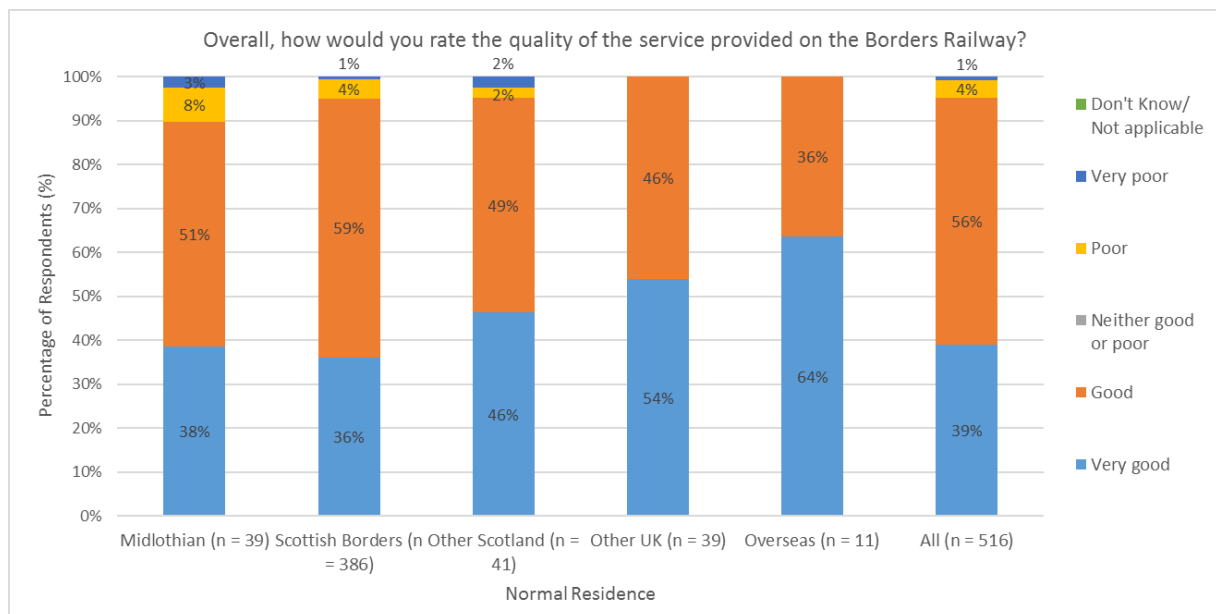


Figure 6.4: Quality of service on the Borders Railway

Figure 6.5 shows the **net satisfaction** with various aspects of service in the Borders Railway. Net satisfaction is the proportion of respondents who were satisfied with the aspect of service minus the proportion of respondents who were dissatisfied.

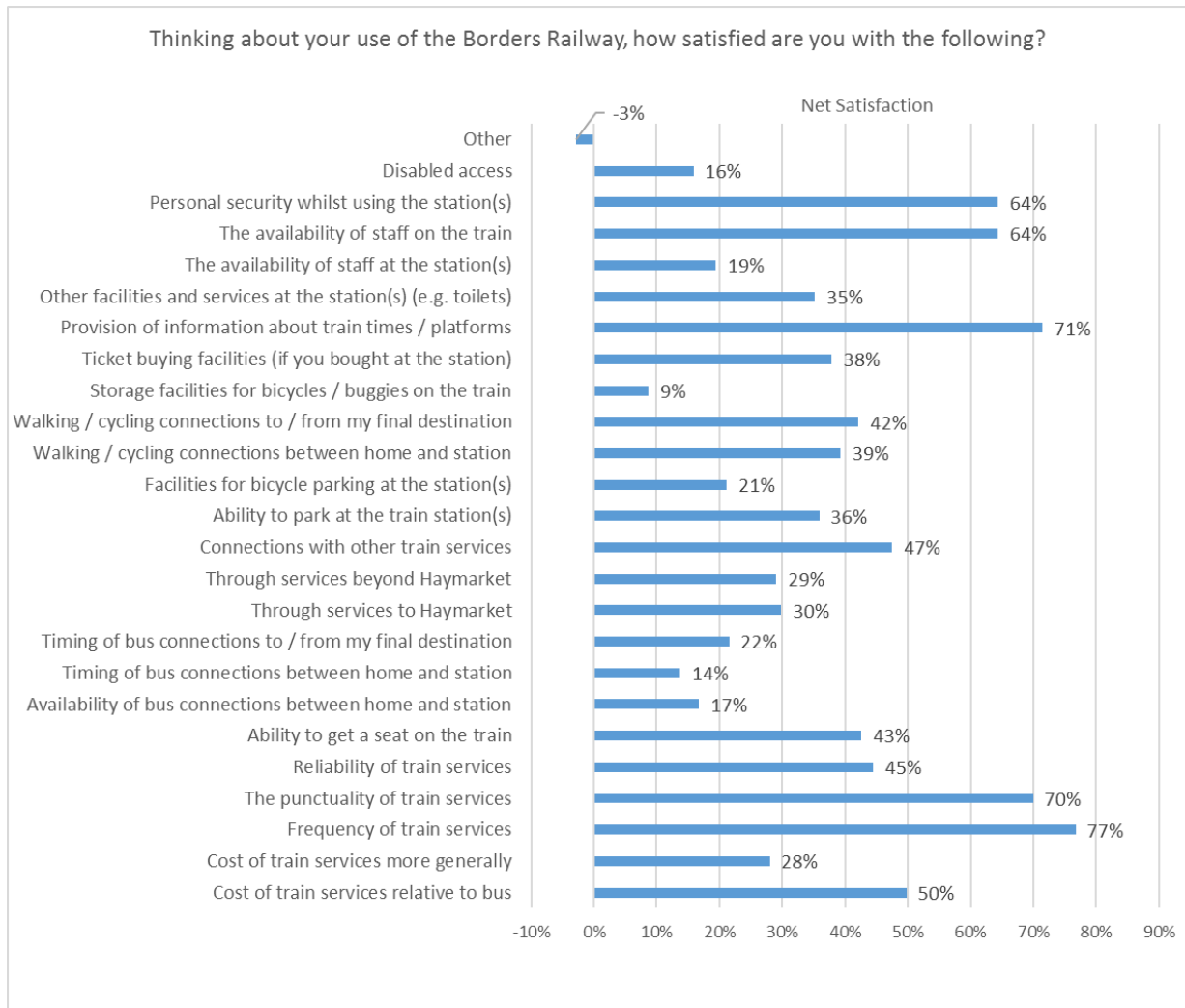


Figure 6.5: Net Satisfaction with aspects of service on the Borders Railway

Overall, respondents reported a high degree of satisfaction. The lowest net satisfaction was with ‘*Other*’ aspects of the service (-3% net satisfaction) with comments provided on the number of carriages available, on-board toilet facilities available and lack of Wi-Fi. Net satisfaction was also low for the ‘*timing of bus connections between my home and the station*’ (for which 29% were satisfied and 16% were dissatisfied, ‘*disabled access*’ (18% satisfied and 2% dissatisfied) and the ‘*availability of bus connections between my home and the station*’ (32% satisfied and 16% dissatisfied).

In the Year 1 Survey, ‘*other facilities / services at the station(s)*’ has the lowest net satisfaction rate (0% net satisfaction). As shown in the Figure below, net satisfaction with this aspect was far higher in the Year 2 Survey (35%). At the time of the Year 1 Survey, all Borders stations were unstaffed without toilet facilities (except for the Interchange at Galashiels). However, since the Year 1 Survey a new customer hub and accessible toilet facilities has opened at Tweedbank Station. This may in part account for the higher satisfaction with these aspects in the Year 2 Survey.

Net satisfaction with the *reliability* of the service (a key issue in the first year of operation) was higher amongst Year 2 respondents (63%, n=502) compared to Year 1 (55%, n=562). Similarly, satisfaction with capacity was also slightly higher although the difference was more marginal with 64% (n=510) of Year 2 respondents satisfied with their ability to find a seat on the train compared to 62% (n=636) of Year 1 respondents.

Figure 6.6 shows the net satisfaction with reliability and capacity 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 10 – 1600 and PM is defined as 1600 – 1800.

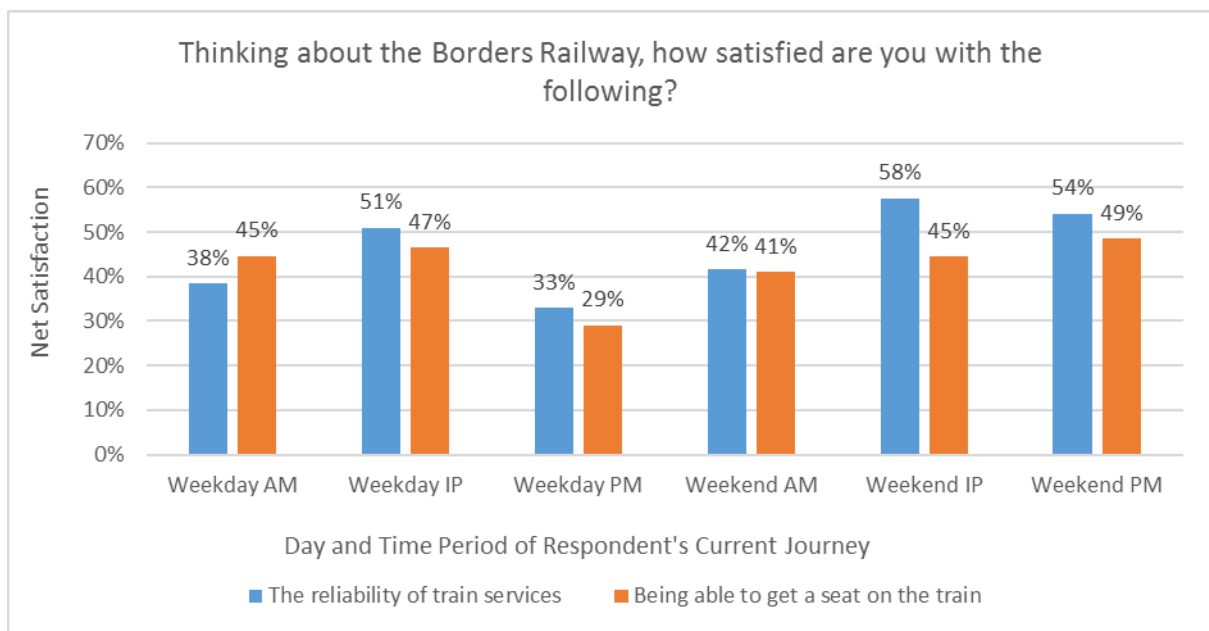


Figure 6.6: Respondents satisfaction with the reliability of the service and the ability to get a seat by time period of current journey

Generally, net satisfaction with service reliability is lower amongst those travelling during the week. However, with regard to getting a seat net satisfaction was higher amongst those travelling on weekdays at AM and IP times compared to weekend trips. This reflects the data above which indicates that capacity is more of a problem on weekend services.

Key Point:

Satisfaction with the quality of service was higher amongst respondents to the Year 2 survey with 95% of Year 2 respondents rating the service as very good or good compared to 80% of respondents to the Year 1 Survey. Year 2 respondents were least satisfied with 'Other' aspects. Satisfaction was also relatively low with storage facilities for bicycles and buggies on-board the trains and the timing and availability of bus connections between home location and the station. Overall, 63% were satisfied with the reliability of the service whilst 64% were satisfied with their ability to find a seat on the train, higher than the equivalent figures for the Year 1 Survey.

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 the proportion of respondents who disagree) for the sample as a whole and for respondents from Midlothian and the Scottish Borders.

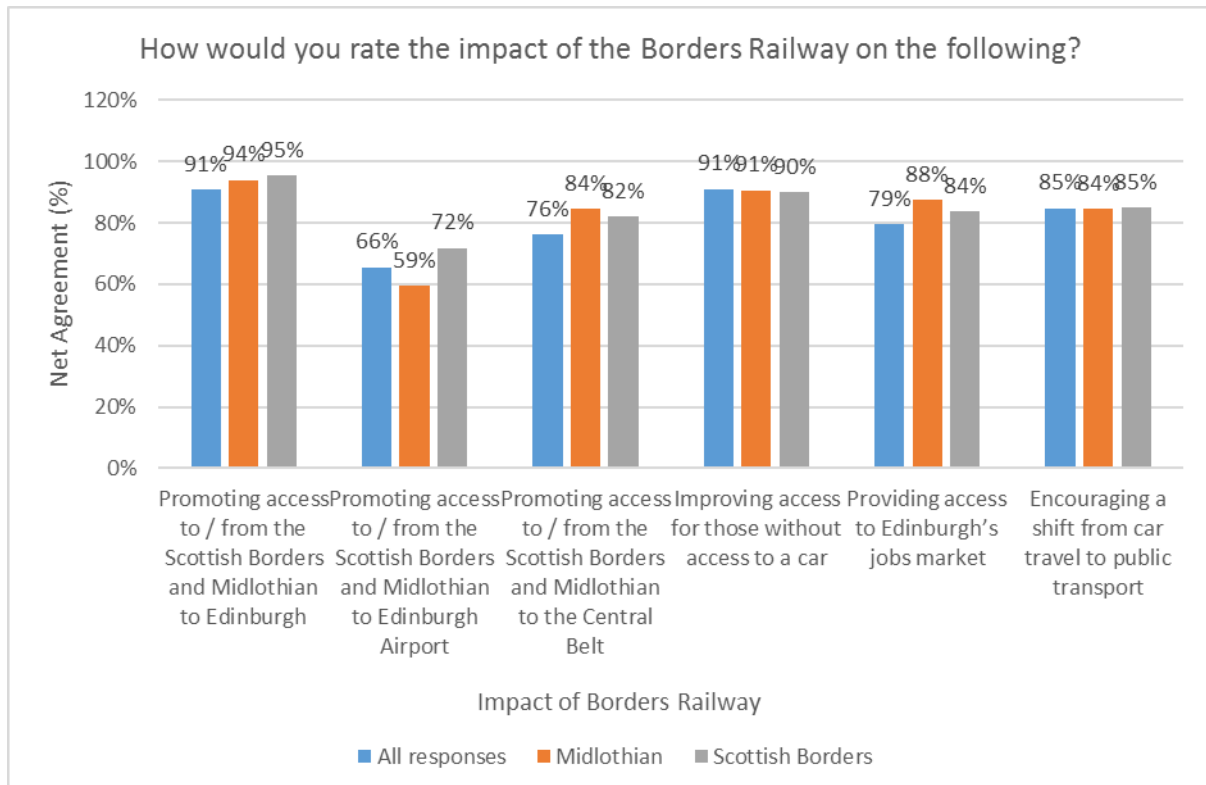


Figure 6.7: Impact of the Borders Railway (net agreement)

Overall, there was a positive perception of the Borders Railway amongst respondents. The highest scoring criteria were 'promoting access to / from the Scottish Borders and Midlothian to Edinburgh' and 'Improving access for those without access to a car', each of which had a net agreement of 91% for the sample as a whole. This mirrors the results from the Year 1 User Surveys which also had 91% net agreement for each of these impacts.

Key Point:

There was a positive perception of the Borders Railway amongst respondents in terms of performance against its objectives with more than 90% agreeing that the railway had promoted access to / from the Scottish Borders and Midlothian to Edinburgh as well as improving access for those without access to a car.

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

Non-users, one-off and irregular users 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, and the results can be found in the figures overleaf. Overall, the most common response was the '*car is more convenient*' with 72% (n=181) of respondents citing this as a reason for their limited use. Other common responses including '*the bus is cheaper*' (46%, n=115), '*the bus is more convenient*' (43%, n=108), '*the cost of train fares*' (38%, n=95) and '*bus connections to the station being inconvenient*' (31%, n=77).

As with the Year 1 Survey results, the bus was more of a draw amongst residents from Midlothian with 51% (n=82) reporting that '*the bus is cheaper*' compared to just 21% (n=19) of the Scottish Borders sample. In addition, a larger proportion of Midlothian residents (40%, n =64) felt that the bus was more convenient than the train compared to just 20% (n=18) of Scottish Borders residents. A greater proportion of Midlothian residents relative to Scottish Borders residents also cited their ability to use their National Entitlement Card for free bus travel (23% compared to 11% respectively). The more positive outlook with regard to buses amongst Midlothian respondents is likely to be a result of the availability of the Lothian Bus £1.60 flat fare and the large number of services to/from Edinburgh and corroborates the findings from the bus consultations as discussed above.

A higher proportion of Scottish Borders residents compared to Midlothian residents selected '*the train is not reliable enough*' (29% compared to 24%) and '*it is too difficult to get a seat*' (32% and 23% respectively). In comparison with the Year 1 evaluation, the proportion of Year 2 respondents from both the Scottish Borders and Midlothian selecting these aspects is higher.

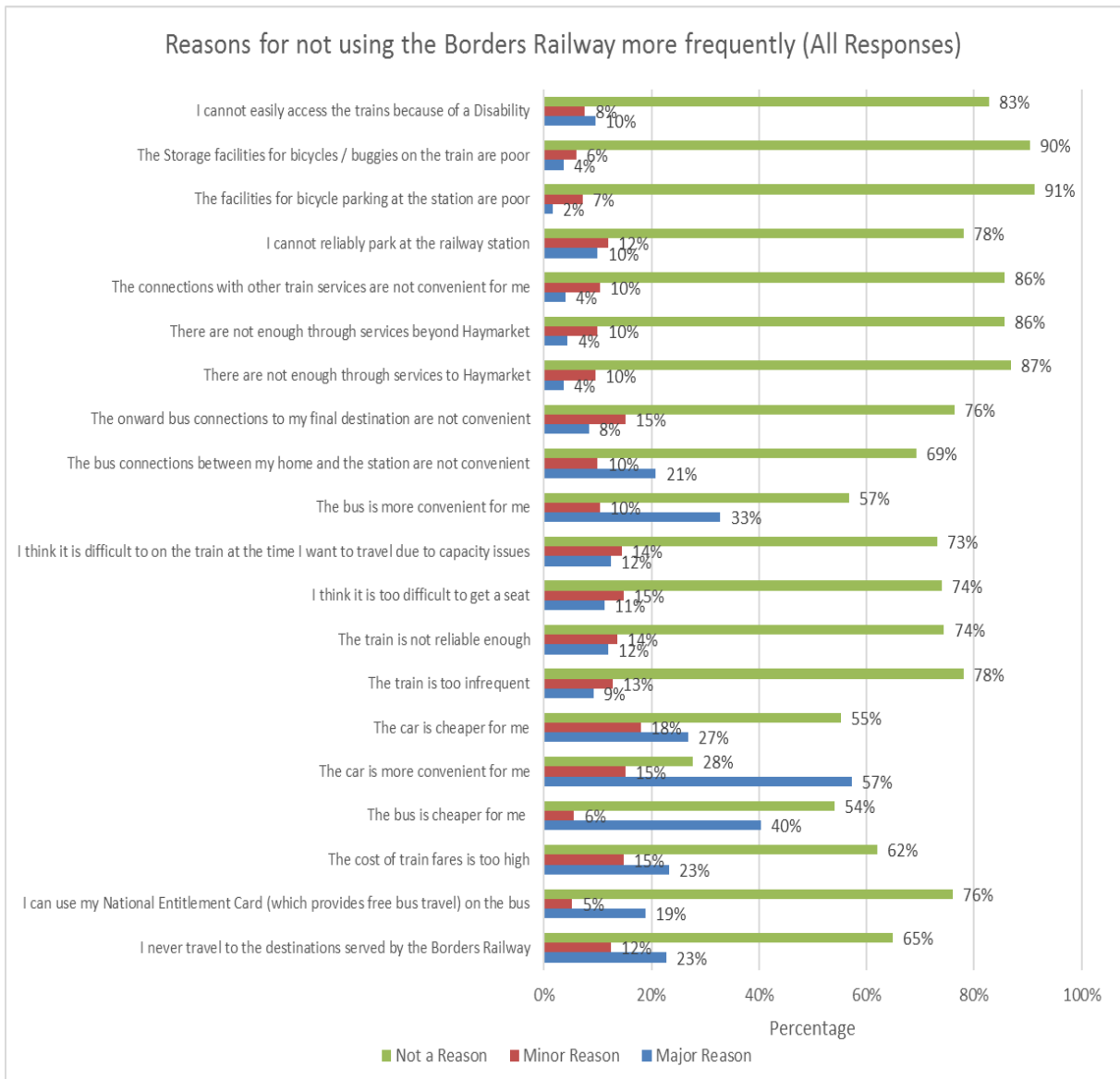


Figure 6.8a: Reasons for not using the Borders Railway more frequently by geography

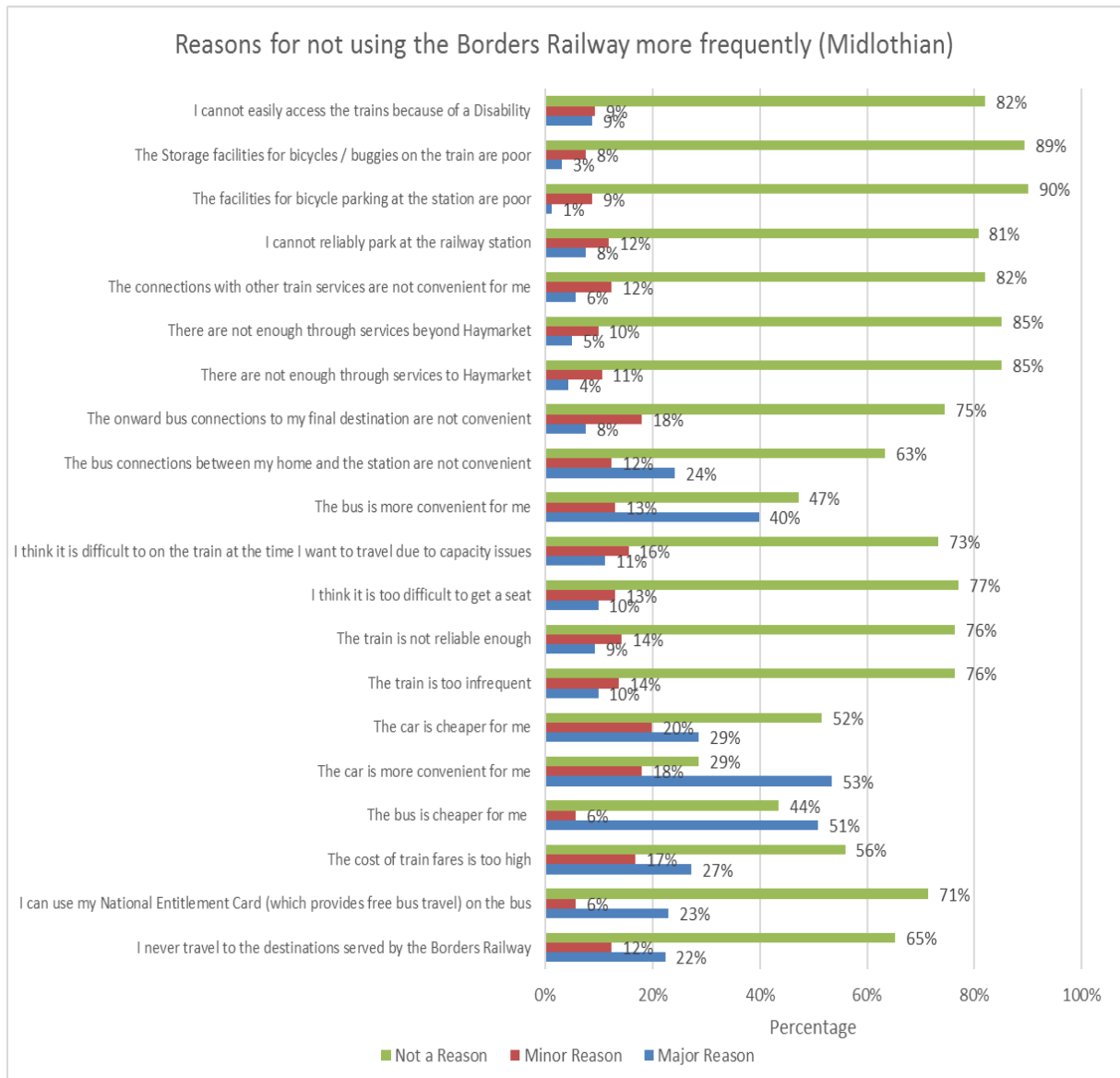


Figure 6.8b: Reasons for not using the Borders Railway more frequently by geography

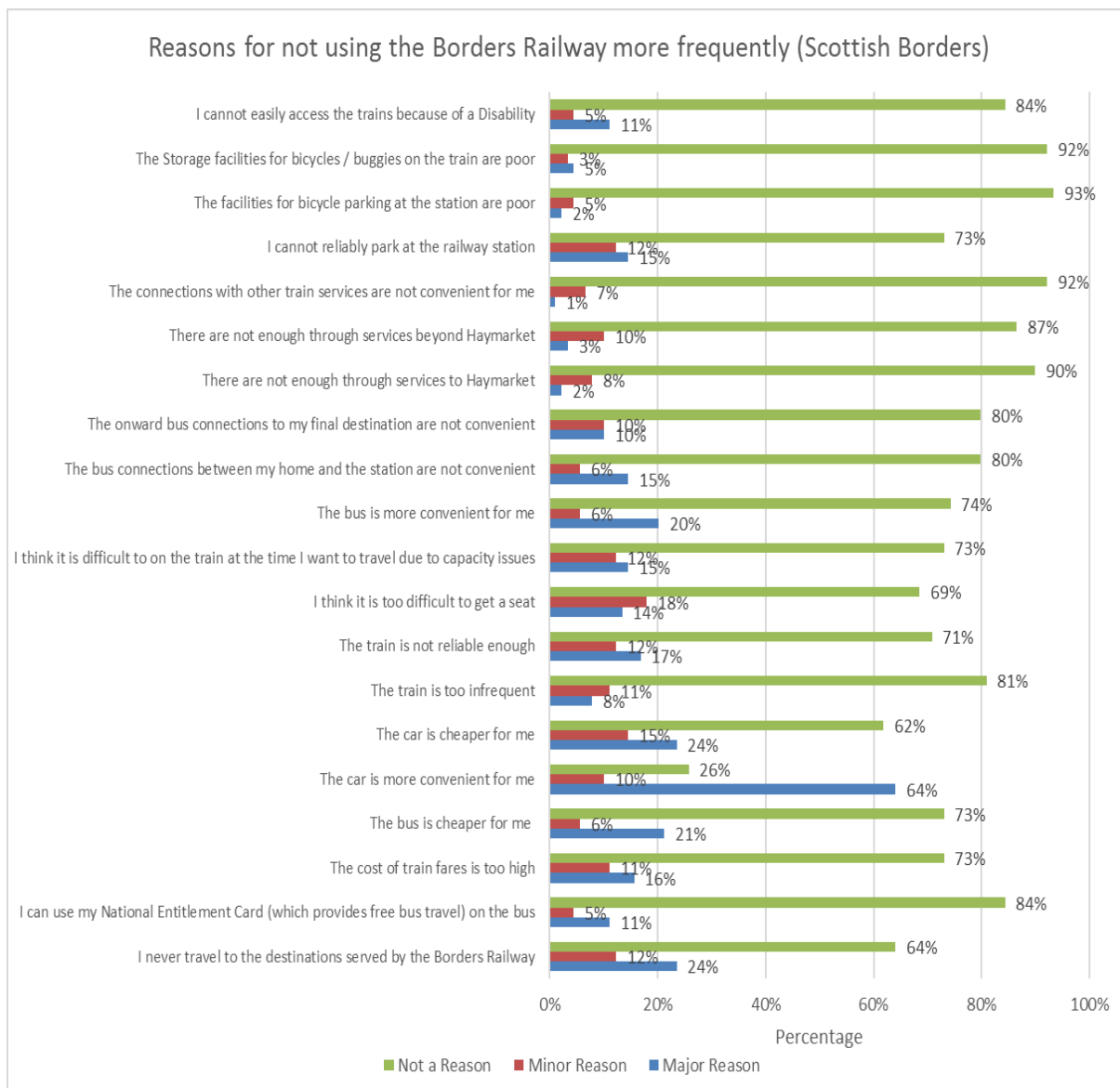


Figure 6.8c: Reasons for not using the Borders Railway more frequently by geography

Key Point:

The majority of respondents (72%) stated that they did not use the service more frequently as the car was more convenient. Other common responses included the lower cost of bus services (46%), the greater convenience provided by the bus (43%), the cost of train fares (38%) and the inconvenience of bus connections (31%). As was the case during the Year 1 Survey, bus options were more of a draw amongst Midlothian residents compared to those in the Scottish Borders. This is likely to be a result of the availability of the flat fares and the more developed bus network in this area. Capacity and reliability issues were more of a concern amongst non-user respondents based in the Scottish Borders compared to Midlothian, with the proportion of respondents citing these issues in Year 2 higher than the equivalent figures in Year 1.

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

In total, 40% (n=100) of respondents to the Non-User Survey reported that improvements to the Borders Railway would encourage them to use the service. This is comparable to the results from the Year 1 evaluation in which 37% (n=84) of respondents selected this option.

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'* (84%, n=84%). Other common responses included *'the ability to reliably get a seat on the train'* (68%, n=68), *'the extension of the Borders Railway to Carlisle'* (68%, n=68) and *'the ability to reliably get on the train at the time they wished to travel'* (n=63%, n=63).

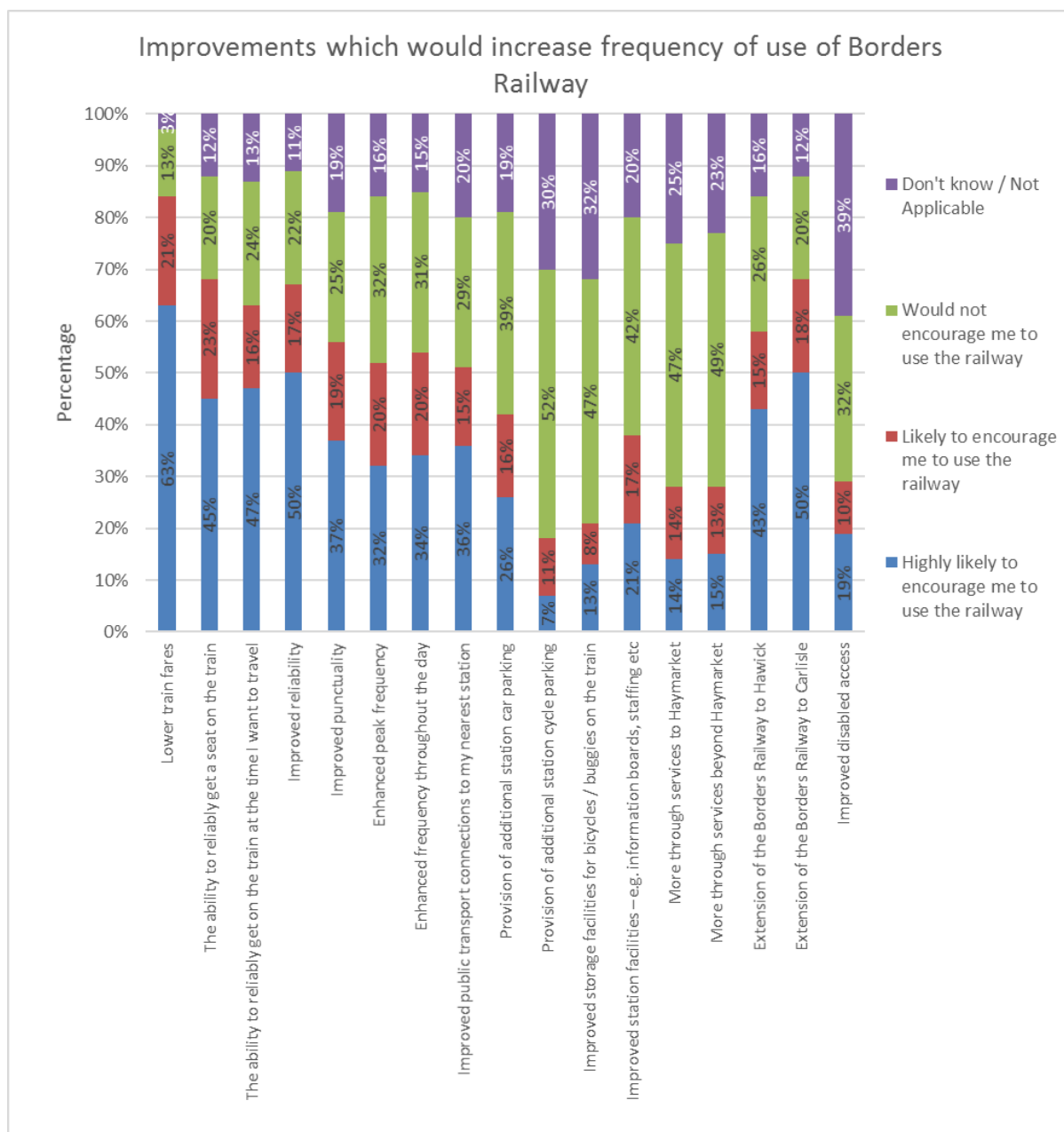


Figure 6.10: Factors which would encourage use of the Borders Railway (all respondents)

There were slight differences in the responses from Midlothian and Scottish Borders residents. In Midlothian, the most popular improvements were *‘the ability to reliably get a seat on the train’* and *‘improved reliability’* (63%, n=37 respectively). This was followed by *‘the extension of the Borders Railway to Carlisle’* (61%, n=36). Other popular improvements included *‘enhanced frequency throughout the day’* (54%, n=32), *‘improved punctuality’* (53%, n=31) and *‘the ability to reliably get on the train at the time I want to travel’* (53%, n=31). For the Scottish Borders, the most popular response was *‘lower train fares’* (83, n=34). Other common responses included *‘the ability to reliably get a seat’* (78%, n=32), *‘the extension of the Borders Railway to Carlisle’* (78%, n=32) and *‘improved reliability’* (73%, n=30).

Those respondents to the Non-User Survey who said improvements would encourage them to use the service (n=100) were also asked how **many trips they would make** if the service was improved in the way they identified. Based on the responses provided and using the frequency factors outlined in Appendix B, it is estimated that an additional 4,924 trips per year would be made (by this sample of 100) on the service if the improvements outlined above were made.

Respondents were also asked **which stations** they would typically travel from and to when making these trips. As shown in Figure 6.11, a range of origin stations were selected. Overall, the largest proportion of respondents selected Tweedbank (29%, n=29). However, based on the frequency with which respondents indicated they would make their journey Eskbank was the most popular origin station accounting for 35% (n=1,743) of the estimated potential annual trips. As shown in Figure 6.12, Edinburgh Waverley was the most popular destination, accounting for 71% (n=71) of responses and 82% (n=4,024) of the potential journeys.

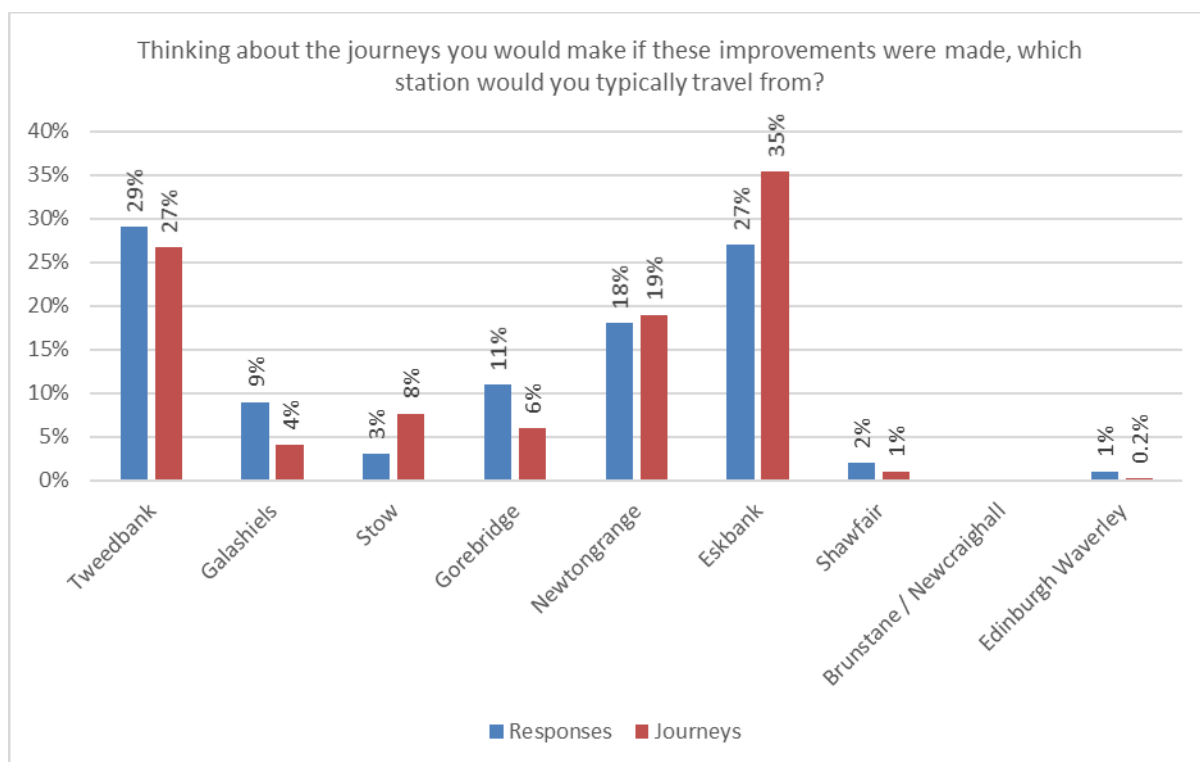


Figure 6.11: Origin Station of Potential Future Trips

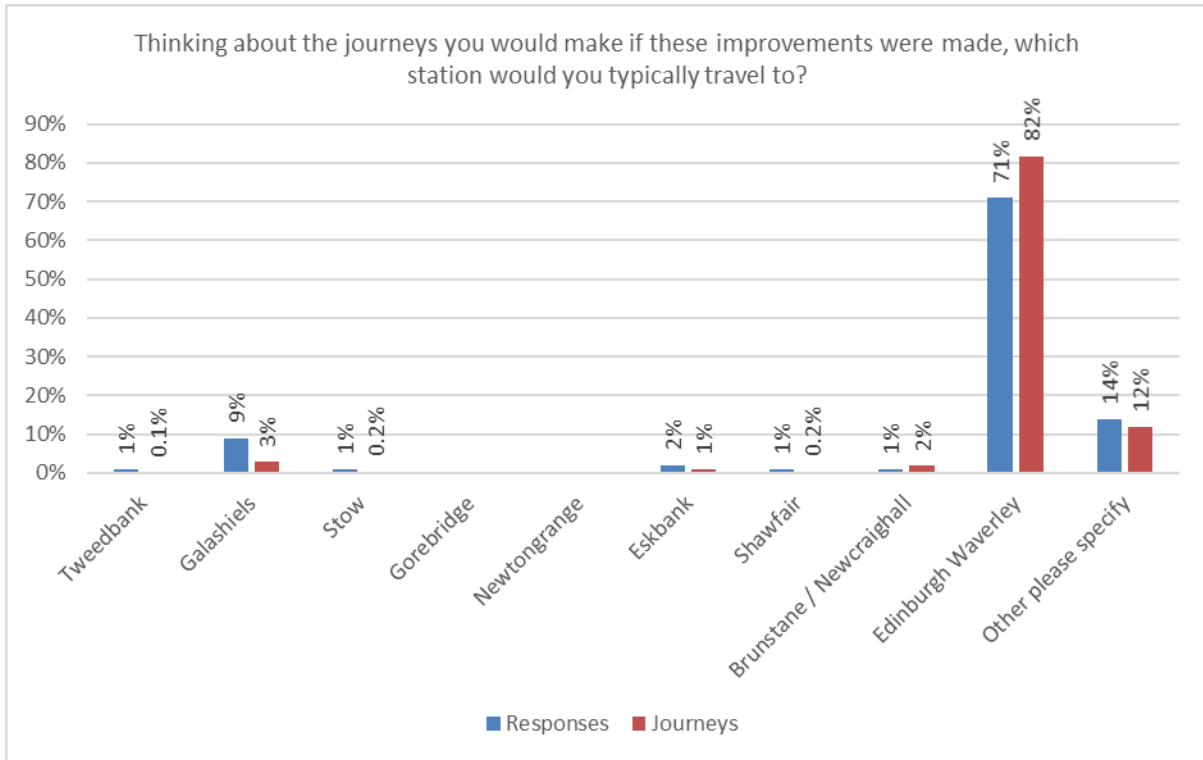


Figure 6.12: Destination Station of Potential Future Trips

In order to understand the degree of modal shift such journeys would generate, respondents were also asked by which mode they currently make these journeys. The results can be seen in Figure 6.13 below.

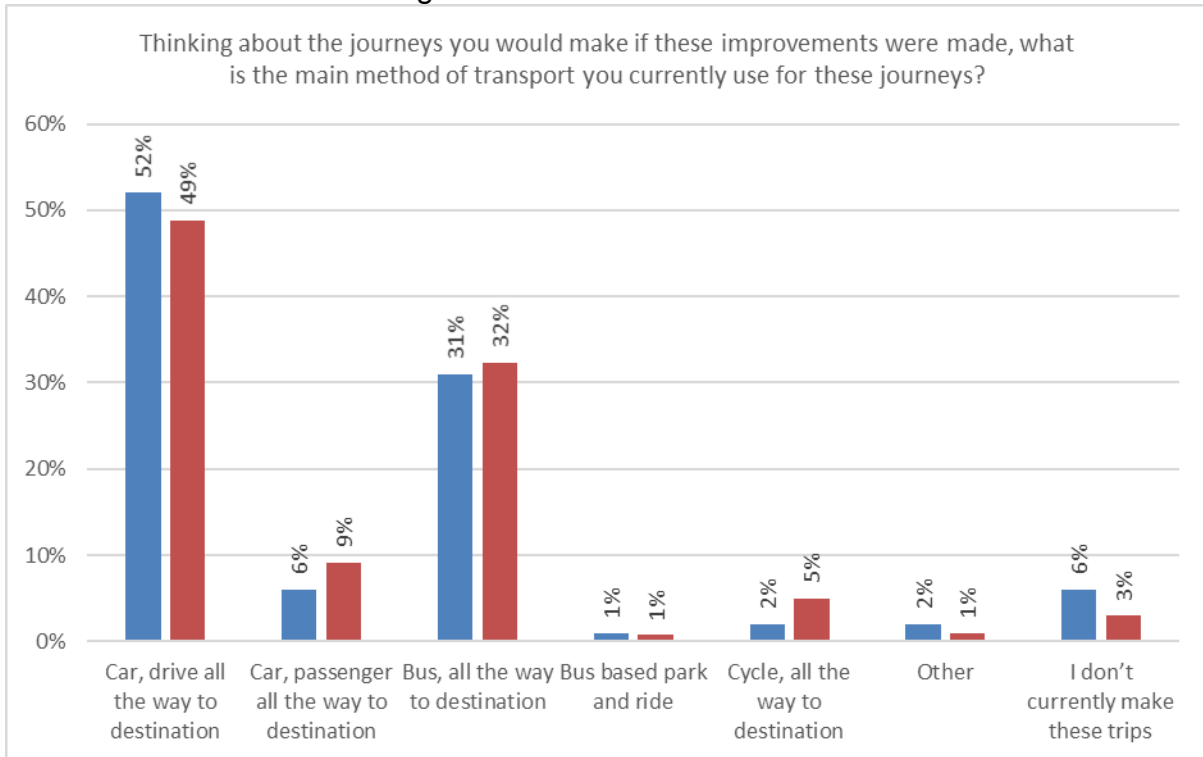


Figure 6.13: Mode Currently used for Potential Future Trips

Just over half of respondents stated that they currently drive all the way to their destination, with a further 6% travelling as car passengers, suggesting that, should the improvements be made, there would be some modal shift from car to rail.

However, a significant proportion (31%, n=31) stated that they currently make these journeys by bus and therefore there would also likely be some modal shift from bus to rail.

Key Point:

In total, 40% 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 being 'lower train fares'. Whilst those in the Scottish Borders also cited 'lower train fares' as the most likely to encourage greater use, the most popular response in Midlothian was 'the ability to reliably get a seat on the train'. Respondents were also asked to indicate how often they would make journeys on the line if their suggested improvements were made. Based on the frequency responses provided, it is estimated that almost 5,000 additional rail journeys per year would be made by the 100 respondents questioned, with almost 50% of these 'car to rail' trips and almost a third 'bus to rail' trips.

Appendix A

User Survey Sample Characteristics

Overall, the majority of respondents (60%, n=469) were female and 37% (n=293) were male, with 3% choosing not to say. As shown in Figure A1, the 35 – 44 age group represented the largest proportion (17%, n=131).

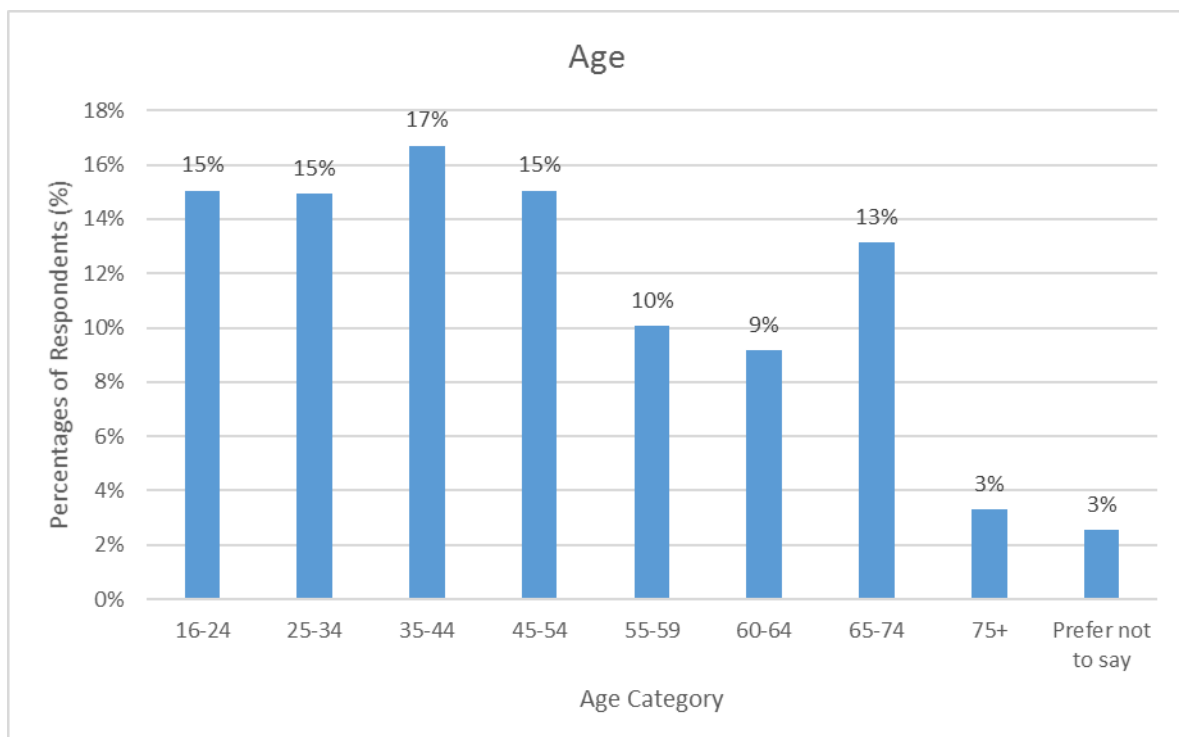


Figure A1: Age Category of Respondents

Figure A1 below shows the employment categories of respondents. Of the 783 respondents who answered the question, 47% (n=365) stated that they were in full time employment with a further 18% (n=139) in part time employment, 5% (n=42) in higher education and 3% (n=27) in further education. The figure below also shows that the survey sample included a relatively high proportion of retired individuals (21%, n=162).

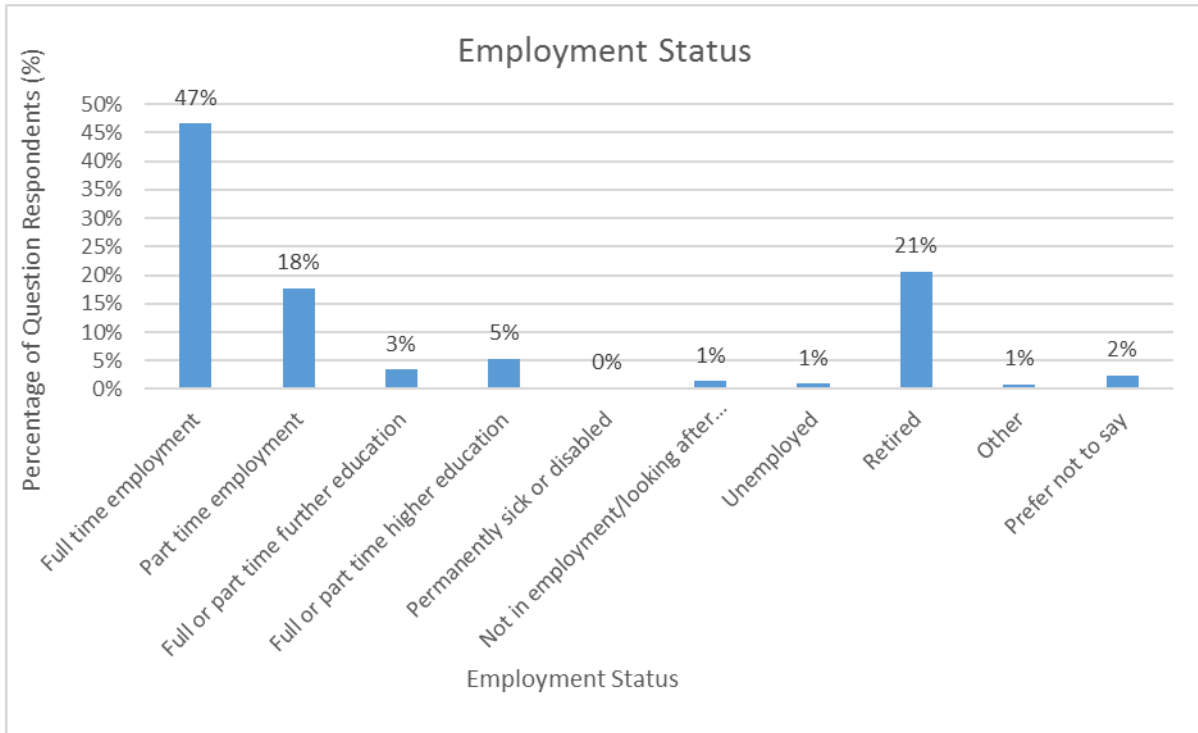


Figure A2: Employment Status of Respondents

Figure A2 shows the annual household income of respondents. Of those who responded to the question (n=728), 15% of respondents (n=110) had household incomes of £60,001 or more per annum with a relatively high proportion preferring not the answer the question (26%, n=187).

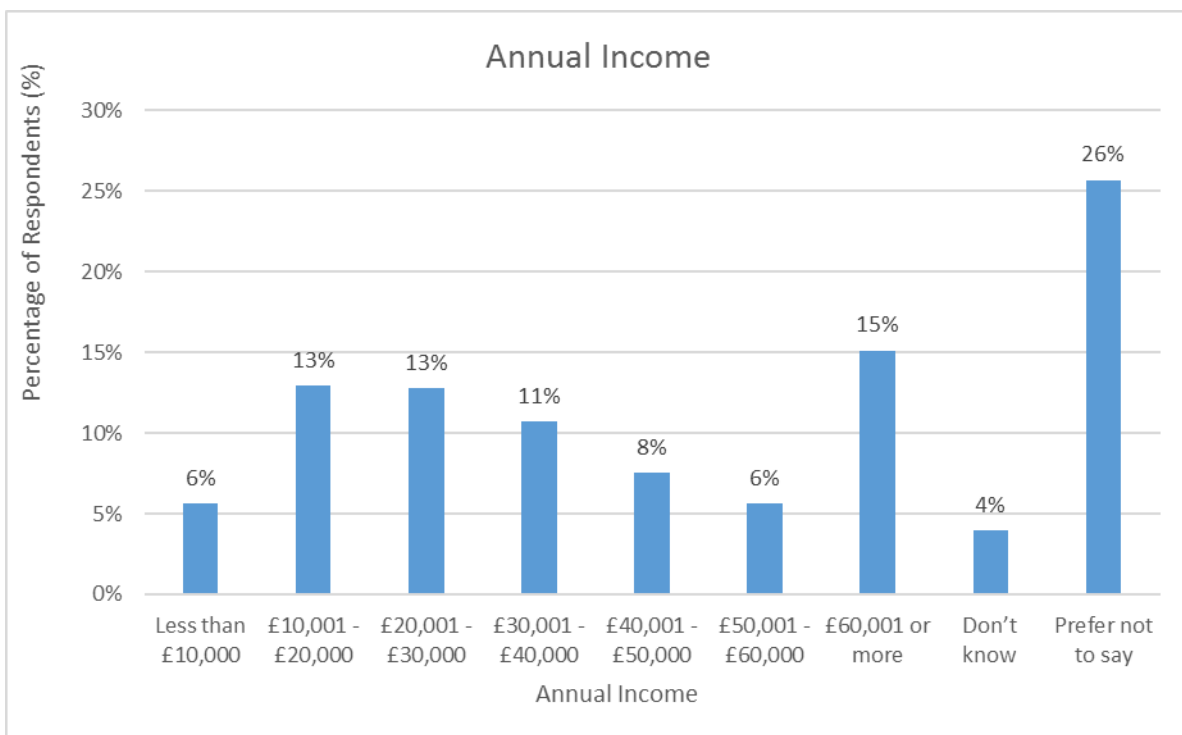


Figure A3: Annual Income of Respondents

Additionally, 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=63) had a disability or long-term illness and 29% said that they held a NEC which provided them with free bus travel.

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 Single Trips
More than 7 times per week	8×47	$8 \times 47 \times 2$
7 times per week	7×47	$7 \times 47 \times 2$
6 times per week	6×47	$6 \times 47 \times 2$
5 times per week	5×47	$5 \times 47 \times 2$
4 times per week	4×47	$4 \times 47 \times 2$
3 times per week	3×47	$3 \times 47 \times 2$
2 times per week	2×47	$2 \times 47 \times 2$
1 time per week	1×47	$1 \times 47 \times 2$
3 times per month	3×12	$3 \times 12 \times 2$
2 times per month	2×12	$2 \times 12 \times 2$
Once a month	1×12	$1 \times 12 \times 2$
Less than once a month	0.5×12	$0.5 \times 12 \times 2$
First time on this service	0	0

Appendix C

Non-User Survey Sample Characteristics

The table below provides a breakdown of the responses by geography, with the results shown graphically in Figure C1. 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

Table C1: Absolute Number and Percentage of Total Responses by Location

		Tier 1	Tier 2	Tier 3	All Tiers
Number of Responses	Midlothian	23	59	53	135
	Scottish Borders	10	21	46	77
	Total	33	80	99	212
Percentage of Total (%)	Midlothian	70%	74%	54%	64%
	Scottish Borders	30%	26%	46%	36%

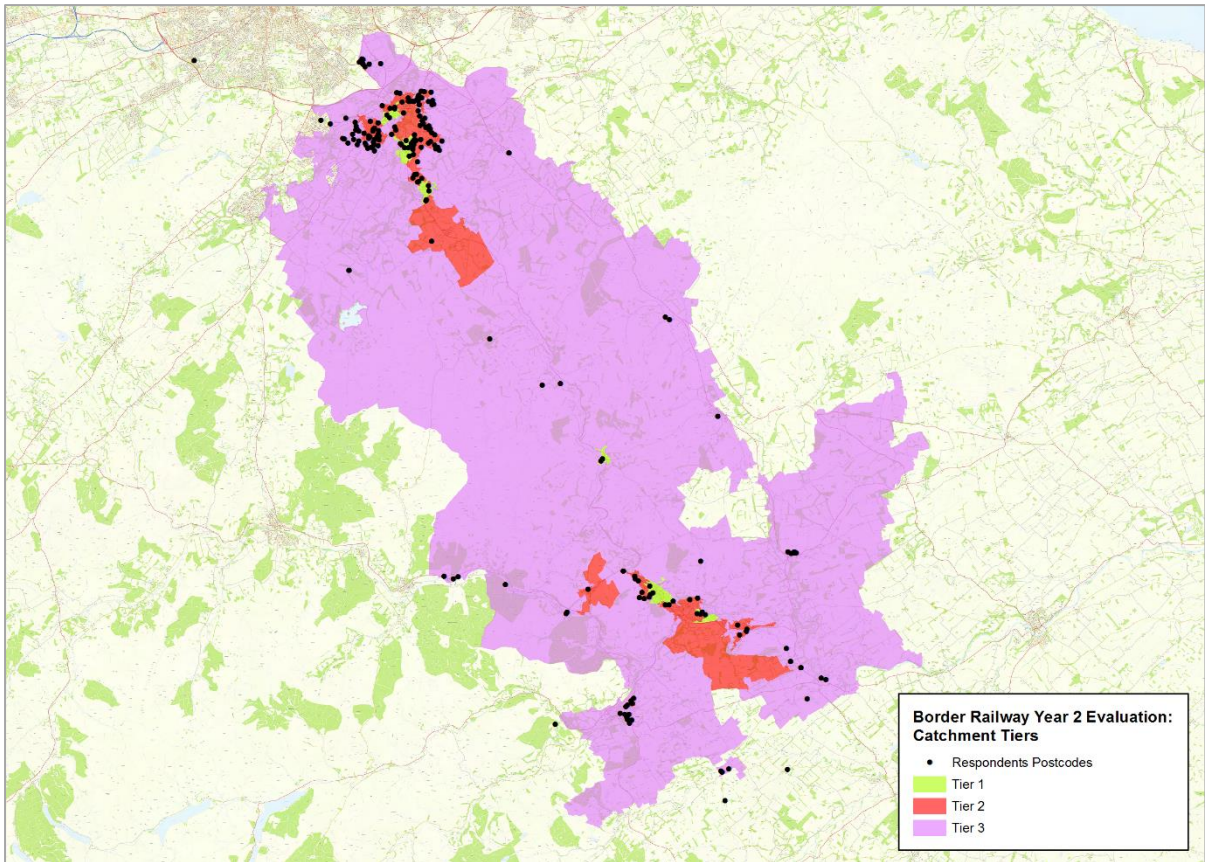


Figure C1: Geographical Distribution of Non-User Survey Respondent Home Location

Appendix D

User Survey: Breakdown of response for those respondents who indicated that the purpose of their journey was either a leisure day trip or overnight stay

Overall, 60% (n=496) of all respondents to the Year 2 Survey indicated that the purpose of their journey on the train was either a day trip or an overnight stay in the Scottish Borders, Midlothian or Edinburgh. The majority of these were female (63%, n=299) and 35% (n=163) were male⁹. Figure D1 below shows that this pattern is similar for both those on day trips and those on overnight stays.

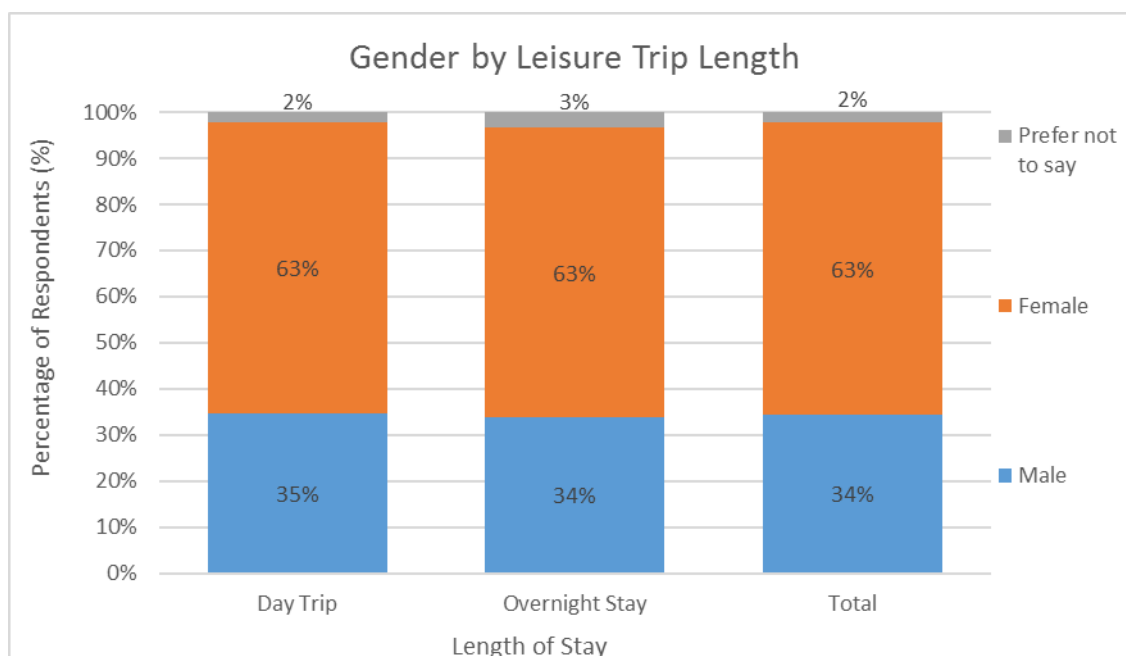


Figure D1: Gender by Leisure Trip Length

Overall, there was a slightly higher proportion of people within the younger age categories on overnight stays compared to those on day trips (see Figure D2).

⁹ The percentage does not total 100 as some respondents choose not to disclose their gender

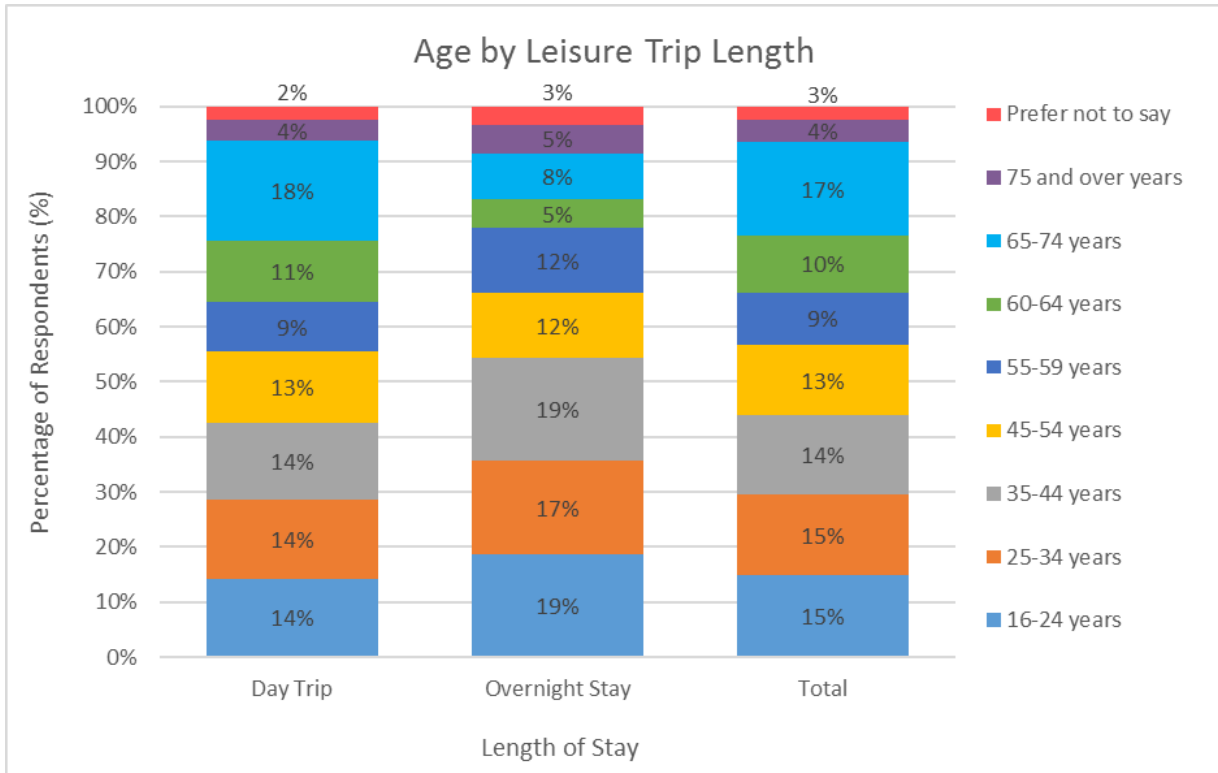


Figure D2: Age Category by Length of Stay

In terms of employment status, Figure D3 shows that a greater proportion of those on overnight trips are in full-time employment (44%, n=26) compared to those on day trips (37%, n=152) while there is a greater proportion of retired individuals on day trips (29%, n=119) compared to overnight visitors (20%, n=12).

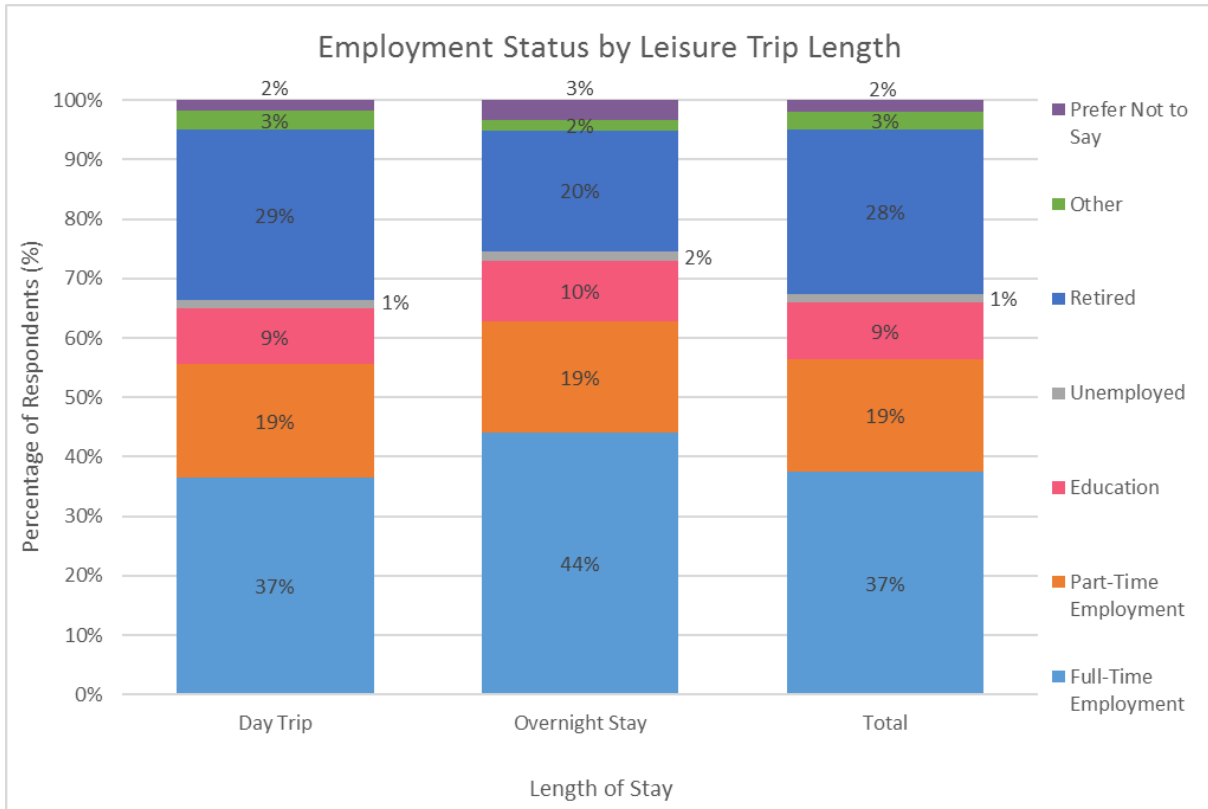


Figure D3: Employment Status by Length of Leisure Trip

Figure D4 below shows the breakdown of annual income by length of leisure trip. Overall, the greatest proportion of those on both overnight trips and day trips earned £20,001 - £30,000 (17% and 14% respectively). Nearly a third of respondents preferred not to disclose their annual incomes (29%, n=127).

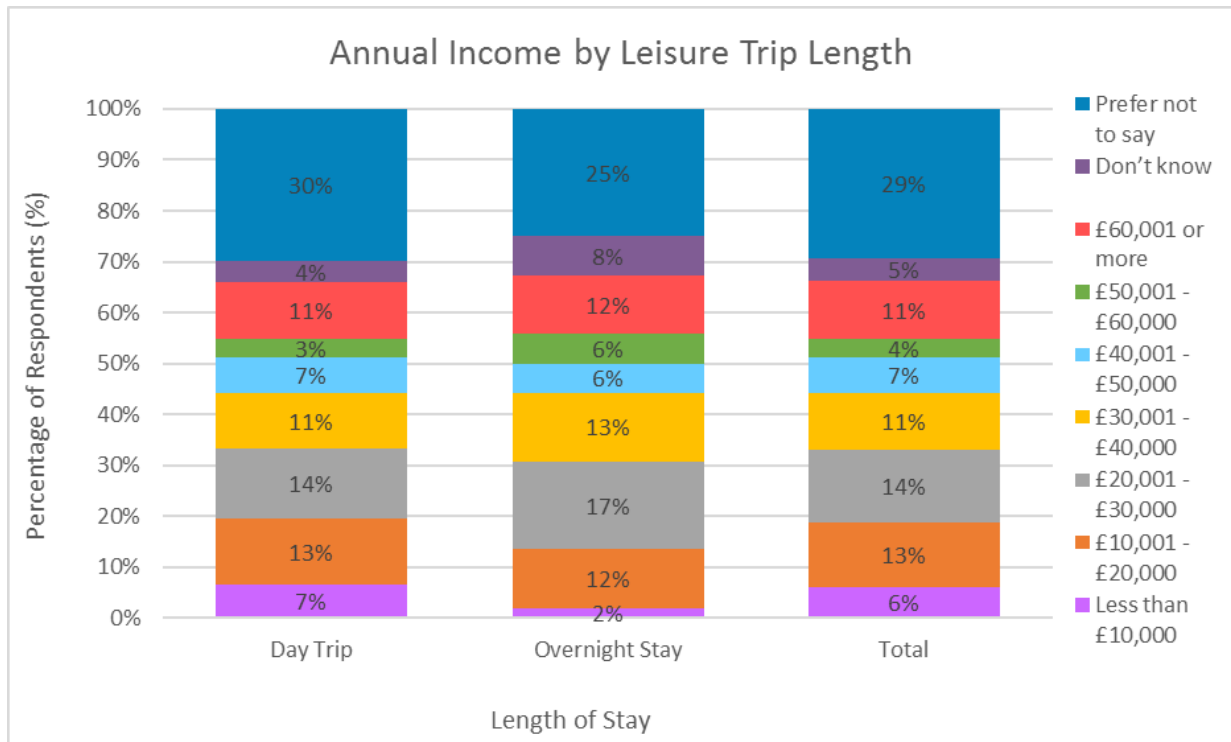


Figure D4: Annual Income by Length of Leisure Trip



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ISBN: 978-1-911582-40-3

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This document is available on the Transport Scotland website: www.transport.gov.scot
Published by Transport Scotland, February 2018

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