First Group – ScotRail Inquiry Report

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Prepared for:

The Competition Commission

Prepared by: David Rodgers

NOP Consumer

Ludgate House

245, Blackfriars Road

London, SE1 9UL

Tel: 020 7890 9779

Fax: 020 7890 9744

Email: drodgers@nopworld.com

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1 Introduction

1.1 Background

The Office of Fair Trading has asked the Competition Commission to look into the proposed acquisition by First Group plc of the ScotRail franchise currently operated by ScotRail Railways Ltd. The Competition Commission has been asked to consider whether the proposed acquisition may be expected to result in a lessening of competition in the market for the supply of passenger transport services on point-to-point sections of routes – sometimes referred to as "flows" – in Scotland.

There was particular interest in knowing the attitudes and behaviours of First Group's current customers on the sections of bus routes between stopping points that are also served by ScotRail trains (i.e. overlapping services) which tend to be around Glasgow, and central Scotland. There is an overlapping service in the Aberdeen area but this was not of interest for this research.

NOP was therefore commissioned to conduct a market research survey investigating travel behaviours and factors that influence choice of travel modes (notably bus and rail) in "flow" areas in Scotland.

1.2 Key Target Audience

The audience of interest to the Competition Commission was defined as:

"Those (in flow areas) who had made a recent journey from home on local public transport where they had a choice of using either bus or train for the main part of their journey"

Specifically, within this target audience, we were required to examine the travel behaviours of different types of public transport users – those who had made a recent journey from their home by:

- Bus at peak time**
- Bus at off-peak times
- Train at peak time**
- Train at off-peak time

** Peak time defined as 07.30 – 09.30 or 16.30 – 18.30

1.3 Research Method

To ensure that we interviewed a representative cross-section of public transport users, NOP undertook a random telephone survey of households in the "flow" areas.

The Competition Commission supplied a list of railway stations in the Central Scotland area where there was considered to be an overlapping bus route. NOP identified all postcode sectors that had at least 50% of their postcodes within two kilometers of these stations. This defined the sample catchment area.

Households within this catchment area were telephoned using the consumer survey method known as random-digit dialling. The sample was provided by UK Changes, an organisation that specialises in the provision of randomly generated telephone numbers.

The sample was selected in proportion to the number of households in each postcode area to ensure that it was geographically representative of households in the 'flow' areas.

Quotas were set on age, gender and working status of adults in the household to ensure that the sample was representative of residents in the area.

1,404 interviews were conducted among a representative sample of local residents in this way. Achievement against quota is shown in the table below:

Table 1 Local resident interviews – Achievement against quota

	Target Quota (%)	Actual Achievement (%)
Gender		
• Male	47	42
• Female	53	58
Age		
• 15-24 years	17	13
• 25-34 years	19	19
• 35-44 years	19	21
• 45-54 years	15	17
• 55-64 years	12	14
• 65+ years	18	16
Working Status		
• Working full-time	39	45
• Working part-time	12	10
• Not working	50	45

From this, NOP identified 680 respondents who had made a recent journey from home on local public transport where they had a choice of using either bus or train for the main part of the journey (the key target audience).

We then conducted "full" interviews, investigating travel behaviours and factors influencing modal switching, among 434 of these 680 respondents. These interviews were conducted according to a quota sample design, with the intention of achieving a minimum of 100 interviews among each of the key user groups (peak-time bus users, off-peak bus users, peak-time train users, off-peak train users).

The breakdown of interviews achieved was as follows:

- Peak-time bus user: 98 interviews
- Off-peak bus user: 139 interviews
- Peak-time train user: 94 interviews
- Off-peak train user: 103 interviews

Data for these 434 interviews has been weighted back at the analysis stage to the known incidence of each user type among the local resident population (as identified from the 1404 resident interviews).

Fieldwork took place 19-25 February 2004.

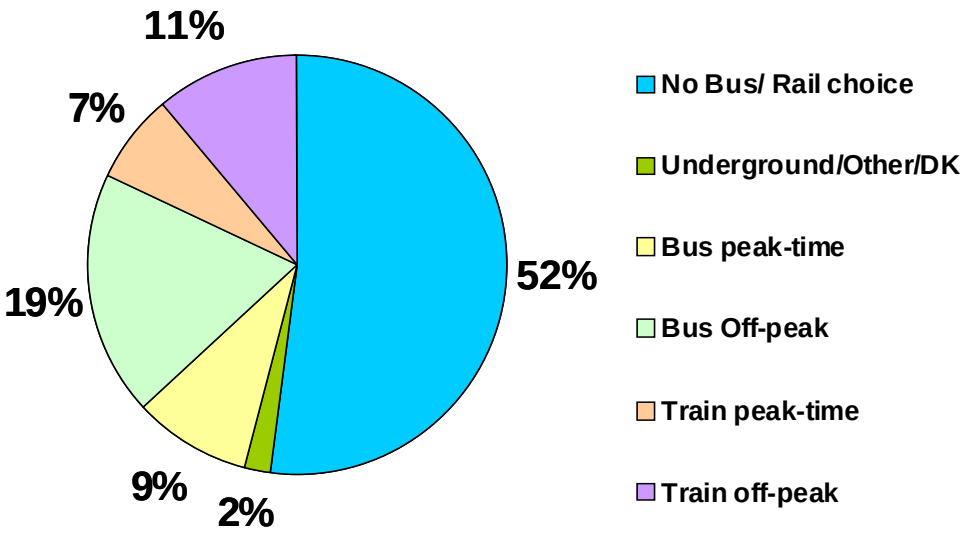
1.4 Use of local public transport services

All 1404 residents interviewed were asked whether they had made a recent journey from home on local public transport where they had a choice of using either bus or train for the main part of the journey. Those who had were subsequently asked what the main mode was for that journey and the time of day they undertook the journey.

One in two (52%) had not made a local journey from home on local public transport where they had a choice of bus or train. A further 2% had made such a journey, but by underground or some other method (not bus or train), and therefore did not qualify for the full interview.

Off-peak journeys by bus were the largest single category (19%) followed by off-peak train (11%), peak-time bus (9%) and peak-time train (7%).

Table 2 Whether made a recent journey from home by public transport where had a choice of bus or rail



Base: All residents (1404)

We added a question towards the end of the fieldwork period that asked the number of (outward) journeys made from home over the last week.

The 425 residents who answered this question made an average of 2.2 bus journeys and 0.6 train journeys, per week.

However, if we look at responses from the subgroup of local public transport users (where had a choice of bus or train), the usage of bus and train is markedly different. Bus users (both at peak time and off-peak) are frequent users of the bus and rarely use

the train. Peak-time train users are frequent users of the train but rarely use the bus, whilst off-peak train users tend to use a greater variety of travel modes, including car.

Table 3 Number of outward journeys made from home in the last week

Mean number of journeys	Total	Bus Peak	Bus Off-peak	Train Peak	Train Off-peak
Bus	2.2	4.9	3.4	0.4	1.4
Train	0.6	0.3	0.3	3.3	1.7
Car or other motor vehicle as driver	4.7	1.9	2.0	2.9	4.3
Car or other motor vehicle as passenger	1.9	1.6	1.5	0.8	2.3
Other own transport	0.3	0.2	----	----	1.2
Walking	4.1	3.9	4.4	2.7	5.8

Base: All residents (425)

2 Profile of Bus/Rail Users

Charts illustrating the demographic profile of each of the four public transport user segments are shown in Appendix A.

There are marked differences in profile between the four segments.

Peak-time bus users tend to be younger (51% are aged under 35 years) and are more likely to be female (63%). In terms of working status they closely match the general resident profile, but they are more likely to be in a lower income bracket (60% of those answering have a household income of less than £20,000), and are less likely to have their own car (43%).

Off-peak bus users are also more likely to be female (65%) but are markedly older (60% aged 45 years plus) than their counterparts who travel in the peak period. They are much less likely to be working (61% non-working) and consequently household income and car ownership is notably lower than the average.

Peak-time train users are split roughly equally between male and females, but they tend to be younger than the average (50% aged under 35 years) and are much more likely to be working full-time (67%). There is a greater proportion of higher income households in this category and car ownership (at 65%) is higher than the average.

Off-peak train users are also younger than the average (51% aged under 35 years) and are more likely to be female (63%). Working status is in line with the norm, but there is a greater incidence of lower income households among this group (only 13% of those answering had a household income of £30,000 or more).

3 Questionnaire Approach

The majority of the questionnaire content was described by OXERA, a consultancy employed by the Competition Commission to undertake modelling of the data collected by NOP. This model was designed to examine consumer preferences between bus and rail.

The information collected by NOP for OXERA asked respondents to give the following details about their most recent bus or train journey from home (where they had a choice between bus and train):

- journey purpose
- length of time taken to get to bus stop/train station from home
- frequency of service
- length of time on the bus/train
- perceived reliability of the service
- length of time taken to reach destination after finishing main part of journey
- whether took any other buses/trains during the outward journey
- length of time waited for all connections
- total door-to-door journey time
- ticket type used
- ticket cost and validity

The questions were then repeated but in connection with how the respondent would have made their journey if they had travelled by the alternative (bus/train) option.

In addition to these core questions, we asked a number of other questions to gain a more "qualitative" feel of likely switching behaviour and attitudes towards multi-operator cards. These questions covered:

- reasons for using their chosen mode rather than the bus/train alternative

- reasons for using their chosen mode rather than their own transport
- changes in service standards that would cause the respondent to switch modes (frequency, journey time and cost)
- perceived ease of switching modes
- whether needed to make connection with another type of public transport
- whether used a multi-operator card
- reasons for using/not using multi -operator card
- interest in joint ScotRail/First Bus ticket

4 Typical Journey Profiles

In this section of the report we describe the journeys actually made by the key audience describing “a recent journey from home where you had the choice of using either bus or train for the main part of the journey”.

The charts that illustrate the findings below are included in Appendix B.

4.1 Peak-time Bus Journeys

Half of all journeys involved travel to work (47%) and a further 14% were commuting journeys to school or college. These also tend to be frequent journeys – 54% were made at least five times a week (outward journey from home).

In nearly half of cases (47%), the traveller used either a single (40%) or return (7%) ticket.

Most of these journeys involved only a short access journey to the bus stop – in three in four cases (77%) it took five minutes or less to get to the bus stop/rail station. Similarly egress time to the final destination after completion of the main journey is short (78% took ten minutes or less).

The typical on-bus time was 11-30 minutes, although 18% spent more than 45 minutes on the bus.

Very few journeys involved a connection with another bus (13%) or another train (3%).

The total door-to-door journey time varied somewhat across the sample, with a few journeys of under 10 minutes duration (2%), and one in four (25%) at over 45 minutes.

Two in three journeys cost less than £1 (based upon ticket type, validity and number of journeys made with the ticket).

4.2 Off-Peak Bus Journeys

The journey purpose profile of off-peak bus journeys is somewhat different. Two in three (67%) were shopping trips. Typically, off-peak bus users made the journey less often than every day but at least once a week.

Many more concessionary passes were used (one in three), although a single/return ticket was used in 37% of cases.

As with the peak-time bus users, most of these journeys involved only short access to the bus stop to start the journey, and short egress to reach the final destination after completion of the main journey.

The typical on-bus time was very similar to peak-time bus users, as was the total door-to-door journey time.

Slightly more journeys involved a connection with another bus (21%), but connections with a train were very low (6%).

Nearly all journeys cost less than £2 per journey.

4.3 Peak-time Train Journeys

Two in three journeys involved travel to work (63%) and a further 10% were commuting journeys to school or college. Peak-time train users tended to travel frequently - 54% made the journey at least five times a week (outward journey from home).

As with peak-time bus users, a single or return ticket was used in over half of cases (56%).

Train users typically made longer access and egress journeys to and from the station (compared with bus users), but the time spent on the train was similar to the bus. Given the longer access and egress times, the total door-to-door journey duration was somewhat longer than for bus.

13% of peak-time train users connected with a bus, and 13% connected with another train.

Cost per journey was somewhat higher than for bus users – in one in three cases the journey price was higher than £2.

4.4 Off-Peak Train Journeys

There were a greater variety of journey purposes in this segment, although predominantly those travelling by train in the off-peak period were making a leisure trip.

Typically, off-peak train users travelled infrequently – 43% made the journey less often than once a week and for 10% it was the first time they had made the journey.

In most cases off-peak train users bought a return ticket (72%).

Journey times and connections were very similar to peak-time rail users.

Cost per journey was similar to peak-time train users (one in three paid more than £2 per journey).

5 Reasons for Choice of Mode

There was very little difference in response between peak-time and off-peak travellers when asked to describe their reasons for modal choice – the motivating factors were the same regardless of the time of day of travel.

The key benefit of rail compared with bus is speed of journey. 71% of peak-time train users spontaneously mentioned this as a reason for choosing the train rather than the bus, as did 60% of off-peak train users. When prompted, over 90% of each identified a "quick journey" as a reason for choosing the train.

In contrast, bus users were much more likely to mention the convenience of bus stops (to the origin/destination point) as the reason for choosing bus rather than the train. Over half mentioned the former spontaneously and over eight in ten after prompting (both peak and off-peak). Bus users also mentioned cheaper fares more frequently as a reason for modal choice (74% of peak-time and 68% of off-peak users after prompting).

Bus users tended not to use their own transport because they didn't have any (58% of peak-time users and 51% of off-peak users mentioned this as a reason). Rail users were more likely to cite car parking costs (about one in three) and speed of journey (about 15%) as the reasons for choosing rail rather than their own transport.

Respondents were asked how frequently their bus/train service ran and their perceptions of its reliability. Bus users, notably in the peak-time, tended to thought they had a very frequent service. One in two peak-time bus users said the service ran at least once every ten minutes and 38% of off-peak bus users said the same. The service frequency for train users was not as great – but most described the service as running at least once every thirty minutes (both peak and off-peak).

Interestingly, nearly all thought the service they used was reliable – and this was true of bus and train users, peak and off-peak.

6 Multi-Operator Tickets

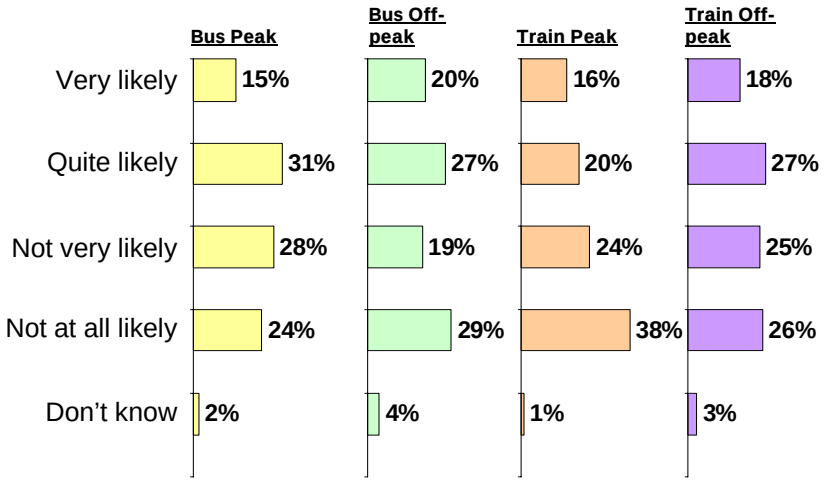
Very few bus users needed to make a connection with a different type of public transport to complete their journey (9% of peak-time; 10% of off-peak users). The proportion of train users needing to make a connection was somewhat higher, but still at a minority level (21% of peak-time and 17% of off-peak users).

Correspondingly, usage of multi-operator cards (cards that can be used on several types of transport) was at a minority level – 9% bus peak-time, 20% bus off-peak, 20% train peak-time and 7% train off-peak.

The main reasons why respondents were not using multi-operator cards centred on lack of any benefit and inconvenience. Very few cited lack of awareness as a reason for non-use (less than 10% in each segment except among off-peak train users where this rose to 17%).

Respondents were asked: "if there was a ticket you could use with ScotRail Trains and the First Bus company only, would it be likely or unlikely to be of interest to you?" As can be seen in the table below, interest was not that great, reflecting the fact that those who made a connection with other public transport during their typical journey are in the minority.

Table 4 Likelihood to be interested in joint ScotRail Trains/First Bus Company ticket



Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

7 The Alternative Choice of Journey

Having described details of the journey they actually made, respondents were then asked to describe how they would make the same journey but by the alternative mode (train/bus). The charts that illustrate these findings are shown in Appendix C.

7.1 Peak-time bus users

If they had to make the journey by train, peak-time bus users thought they would be more likely to buy a single/return ticket (81%) compared with the ticket type they buy on the bus (47% single/return ticket).

They recognised that they would spend less time on the train than on the bus (33% thought they would spend 10 minutes or less on the train c.f. just 15% who actually spend this time on the bus). However, they would spend longer getting to and from the station than to or from the bus stop. They would also have to increase the number of connections to complete their journey, typically with another bus, and therefore their total door-to-door journey time would increase. Nearly half (47%) thought their journey time would exceed 45 minutes, which compares with just 35% who said their actual bus journey took this length of time.

They also thought they would enjoy a less frequent service on the train. One in three claimed not to know what the frequency of the train services would be, and another one in three said it would only be once every 21-30 minutes. This compares with over half (54%) who claimed they have a bus service that arrives at least once every ten minutes.

They also thought the train service would be less reliable. Just 14% described the alternative train service as very reliable compared with 36% who thought their actual bus service was very reliable.

The train would also be a more expensive option. Two in three thought the train journey would cost more than £1, whilst the same proportion said their actual bus journey cost less than £1.

7.2 Off-Peak Bus Users

The findings described above for peak-time bus users are also true of off-peak bus users (describing the alternative off-peak train journey).

If they had to make the journey by train, off-peak bus users thought they would be more likely to buy a single/return ticket (65%) compared with the ticket type they buy on the bus (38% single/return ticket and 33% a concessionary pass).

They recognised that they would spend less time on the train than on the bus (41% thought they would spend 10 minutes or less on the train c.f. just 19% who actually spend this time on the bus). However, they would spend longer getting to and from the station than to or from the bus stop. They would also have to increase the number of connections to complete their journey, typically with another bus, and therefore their total door-to-door journey time would increase. Over half (52%) thought their door-to-door journey time would exceed 45 minutes, which compares with just 38% who said their actual bus journey took this length of time.

They also thought they would enjoy a less frequent service on the train. One in four (28%) claimed not to know what the frequency of the train services would be, and another one in three (38%) said it would only be once every 21-30 minutes. This compares with two in three (63%) who actually have a bus service that arrives at least once every fifteen minutes.

They also thought the train service would be less reliable. Just 28% described the alternative train service as very reliable compared with 45% who thought their actual bus service was very reliable.

The train would also be a more expensive option. Two in three thought the train journey would cost more than £1, whilst 57% said their actual bus journey cost less than £1.

7.3 Peak-time train users

If they had to make the journey by bus, most peak-time train users would buy a single/return ticket (59%) – slightly more would buy a single ticket (21%) than currently do on the train (9%).

Whilst most thought they would have a shorter trip to the bus stop (compared with the journey they actually make to the train station), they also thought they would spend much longer on the bus for the main part of the journey. Nearly half (47%) thought the bus journey would take over 45 minutes.

They would also have to increase the number of connections with other buses to complete their journey. One in three said they would have to catch two or more buses (markedly higher than the 13% who actually connect to a bus with their current train journey), and 11% said they would have to connect with a train.

As a result of increased connections, and a longer time spent making the main part of the journey, the prospective door-to-door journey time if the journey were made by bus would increase significantly. Four in five (80%) estimated that the journey time would exceed 45 minutes (compared with just one in two (53%) who said the actual door-to-door train journey is of this duration).

Allowing for the fact that one in four did not know what frequency of bus service they would enjoy if they switched to bus, the frequency of alternative bus services would be similar to the kind of service frequency they currently enjoyed on the train. However, reliability of the bus was perceived to be much worse. One in four (26%) thought the bus service would be unreliable (and another 19% did not know what reliability would be like).

Peak-time train users did acknowledge that the cost per journey would reduce if the journey were made by bus. 41% said they would pay £1 or less (compared with just 31% who pay this amount on the train).

7.4 Off-Peak train users

The pattern of responses among off-peak train travellers is similar to that described above for peak-time users.

The key differences to peak-time is that off-peak train users who made the journey by bus would be more likely to buy single tickets (28%), and less likely to buy returns (46%).

The other key difference is that off-peak train users would pay a similar cost per journey if they switched to bus (whereas peak-time train users acknowledged that they would pay less per journey if they switched to bus).

Otherwise they key differences between the actual train journey and the alternative bus journey described above apply, namely:

- much longer travel time on the bus
- increased need to connect with other buses to complete the journey
- significant increase in door-to-door journey time
- a perception that the bus would be much less reliable

8 Triggers for Change of Behaviour

With reference to the most recent journey they made (where they had a choice of bus or rail), respondents were asked what is the maximum journey time they would accept before they would stop using their chosen mode for that journey, assuming service frequency and price were unchanged.

They were then asked what is the minimum frequency of service they would accept; assuming journey time and price were unchanged.

And finally they were asked what is the most they would pay for the same ticket; assuming journey time and frequency were unchanged.

Charts illustrating the findings described below are included in Appendix D.

8.1 Maximum journey time

The actual journey time that respondents experienced was very similar across the four segments, with about one in four spending more than half an hour on the main part of their journey.

When asked to describe the maximum journey time they would accept, 16% - 27% (depending upon the segment) said they either did not know or that they would never stop using their chosen method of transport. However, about four in ten said they would accept a journey of more than 30 minutes, significantly higher than the proportion that actually experienced a journey of this length. This indicates some tolerance of longer journey times. Moreover, the incidence of those accepting a journey length of over 30 minutes was very consistent across the four segments (peak bus, off-peak bus, peak train, off-peak train), suggesting that the tolerance of longer journey times is evident across both modes and at peak and off-peak times.

8.2 Minimum Service Frequency

Half of all peak-time bus users actually received a service frequency of 10 minutes or better, but when asked the minimum frequency of service they would accept, most (82%) said they would accept a frequency worse than this, implying some tolerance of lesser frequency services.

The minimum service frequency that would be accepted by off-peak bus users was very similar to that accepted by peak-time users. Fewer actually experienced a service frequency of 10 minutes or better (one in three), but most would accept a frequency worse than this (79%).

Turning to train services, there is considerable similarity between peak and off-peak users in terms of the minimum service frequencies they would accept. 38% of peak time users and 45% of off-peak users would accept a frequency of less than one train every half an hour, even though most actually enjoyed a service frequency of at least one train every half an hour.

8.3 Maximum ticket cost

Over half (55%) peak-time bus users paid £2 or less for their ticket (this includes concessionary pass holders who paid nothing for their ticket). When asked what was the maximum they would pay for their ticket, nearly one in two of those answering indicated £2 or less. This would imply that there is less tolerance of increased ticket costs among this group than there is of reduced service frequency or longer journey time.

Off-peak bus users were more tolerant of increased ticket prices. Two in three (63%) paid £2 or less for their ticket whilst about four in ten (of those answering) indicated they would only accept a ticket price of £2 or less.

Three in ten (29%) peak-time train users paid £3 or less for their ticket, whilst just under one in four of those answering indicated that they would pay £3 or less. This implies a similar intolerance to price increases as evidenced among peak-time bus users.

Finally, just over half (53%) of off-peak train users paid £3 or less for their ticket, and a similar proportion of those answering said that they would only accept a ticket price of £3 or less – again implying some resistance to price increases.

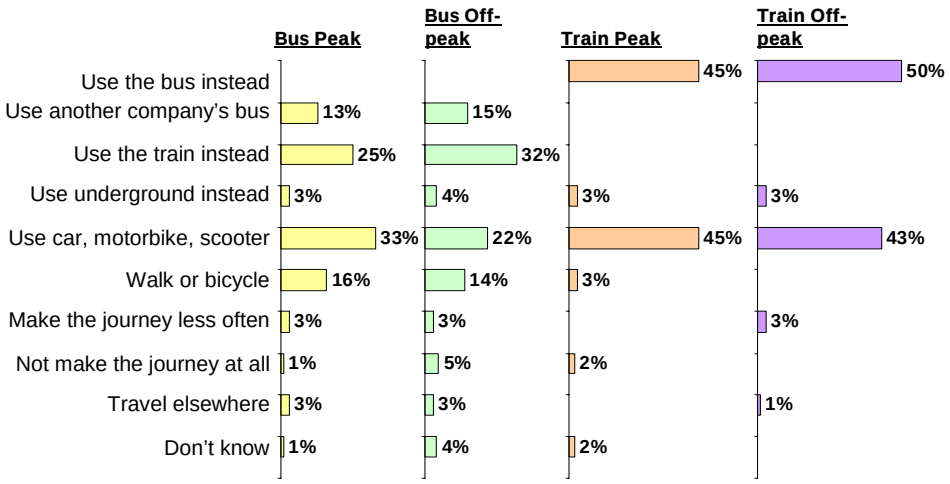
9 Ease of Switching

Those respondents who used a non multi-mode ticket for their most recent journey and who would switch to alternative transport if the price of the ticket were changed, were asked how they would make the journey instead.

Train users would typically switch to either their own transport or to the bus (split roughly 50:50). There were very few mentions of any other alternative options that would be used. This was true of both peak-time and off-peak train users.

Bus users would typically switch to a wider variety of modes, as shown in the table below:

Table 5 How would travel if stopped using bus/train



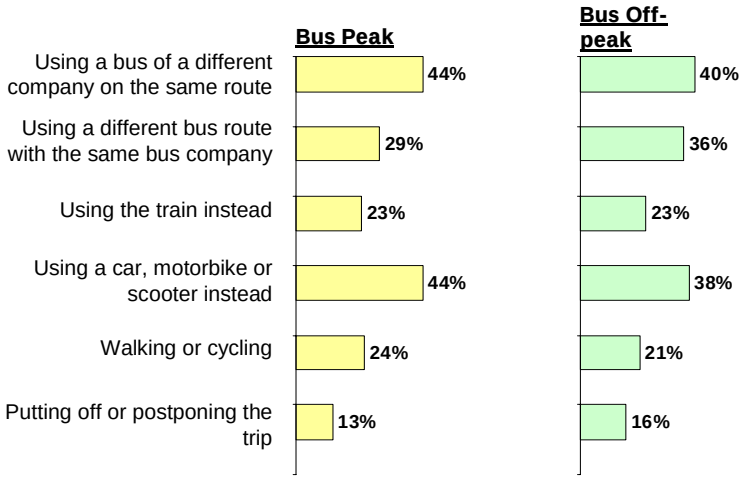
Base: All who used a non multi-mode ticket for recent journey and who would switch to alternative transport if price of ticket changed (Bus peak - 67/ Bus off-peak - 79/ Train peak - 60/ Train off-peak - 70)

All those who had made a recent journey by bus (where they had a choice of bus or rail) were asked how easy it would be to switch to various methods of transport from bus. The chart below shows the percentage indicating that it would be easy (rather than difficult).

The pattern is similar between peak and off-peak bus users. Less than one in four indicated that it would be easy to switch to train, and under one in two that they could switch easily to a bus of a different company on the same route.

Only a few mentioned they could easily put off making the trip altogether.

Table 6 % saying it would be easy to switch from bus by …



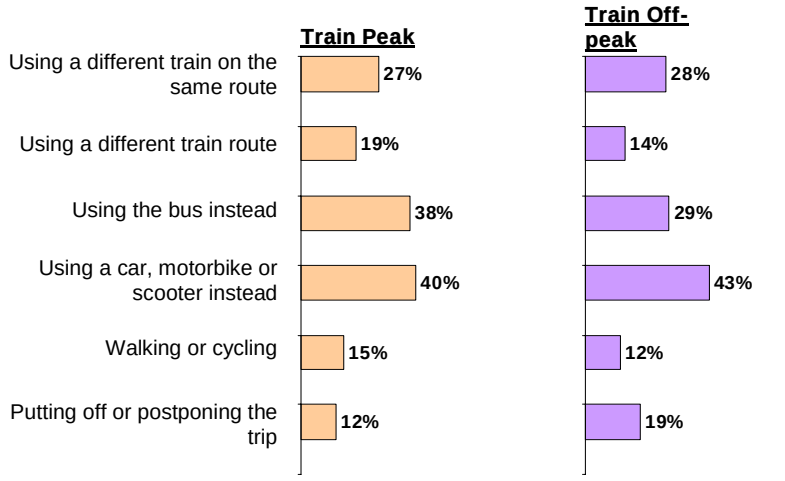
Base: All who made recent (main) journey on bus (Bus peak - 98/ Bus off-peak -139)

Finally, all those who had made a recent journey by train (where they had the choice of bus or rail) were asked how easy it would be to switch to various methods of transport from train.

38% of peak-time users and 29% of off-peak users said they would find it easy to switch to the bus instead. About one in four (of both peak and off-peak users) said they could easily switch to a different train on the same route.

Again, only a few mentioned they could easily put off making the trip altogether.

Table 7 % saying it would be easy to switch from train by …



Base: All who made recent (main) journey on train (Train peak - 94/ Train off-peak - 101)

10 Summary of Main Findings

The demographic profile of bus users, and the types of journey they make, is quite distinct from train users. Bus users (both at peak and off-peak times) are frequent users of the bus and rarely use the train. They tend to be from lower income households, are more likely to be female, and car ownership is below the norm. Peak-time use is characterised by younger travellers making commuting journeys, whilst off-peak use is more often made by older travellers on shopping trips.

Convenience of the bus stop to the origin and destination points of the journey, and cheaper fares, are the primary motivations for choosing the bus rather than the train. Very few bus journeys involve a connection with either another bus or another train and the service is mostly seen as reliable.

If they were going to making their journey by train, bus users recognise that they would spend less time on the train making their journey, but they would spend longer getting to and from the station, and they would have to make more connections to complete their journey. Therefore, their anticipation is that the total door-to-door journey time would increase. They also believe the train alternative would be more unreliable and expensive.

Peak-time train users are frequent users of the train (typically for commuting purposes) and rarely use the bus. They tend to be from higher income households with higher car ownership, and are more likely to be younger males working full-time. Journey speed is the main reason why these travellers use rail.

Off-peak train users tend to be younger as well, but are more likely to be lower income females. They are using the train much less regularly than peak-time users, and the train is predominantly being used in this time period for leisure trips. Off-peak train users are using a greater variety of transport modes than other travellers.

Once again, though, the primary motivation for train use (rather than bus) is speed of journey.

If they were going to make their journey by bus, train users recognise that they would spend less time getting to the bus stop (rather than the train station). However, they believe that the bus journey would take much longer, and that they would have to make more connections to complete their journey. Their perception also is that the bus would be much less reliable than the train.

Overall, only a minority are making journeys that involve connections with different forms of public transport, and therefore usage of multi-operator cards is not high.

There is evidence that some travellers would tolerate longer journey times before they stopped using their chosen method of transport – and this was true of bus and train users, in both peak and off-peak periods. Similarly, some travellers would tolerate a reduced service frequency of their chosen mode. However, there appears to be less tolerance of increased ticket prices.

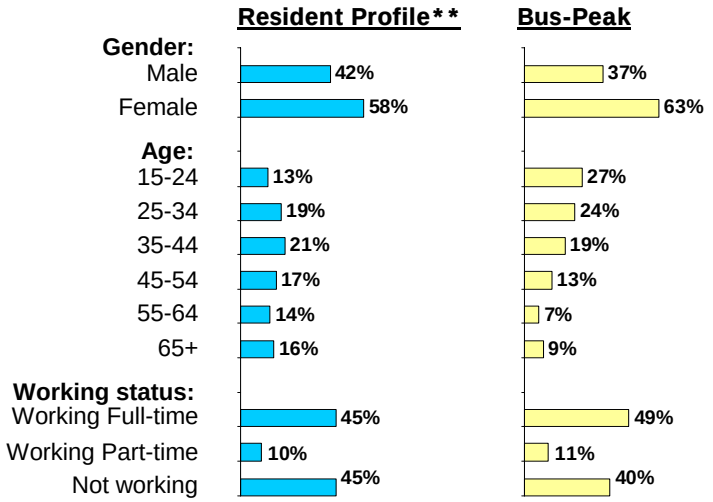
If they were forced to switch from the train they used, roughly half of train users would make their journey by car and the other half by bus. Bus users would typically switch to a wider variety of options (car, train, walking, or using another bus company).

Only a minority (roughly one in four) of bus users indicated that it would be easy to switch to train, and under one in two that they could easily switch to a bus of a different company on the same route. Few mentioned that they could easily put off making the trip altogether. This was true of both peak and off-peak bus users.

About one in three train users said they could easily switch to the bus (slightly higher among peak time users, and slightly lower among off-peak users). About one in four (of both peak and off-peak users) said they could easily switch to a different train on the same route. Few mentioned they could easily put off making the trip altogether.

11 Appendix A: Profile of bus/rail users

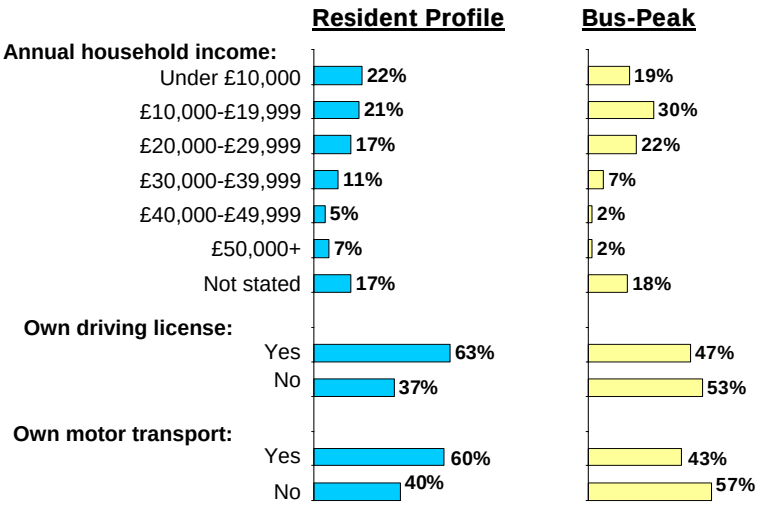
Sample profile - Peak-time Bus Users



Base: All (1404)/ Bus-Peak (131)

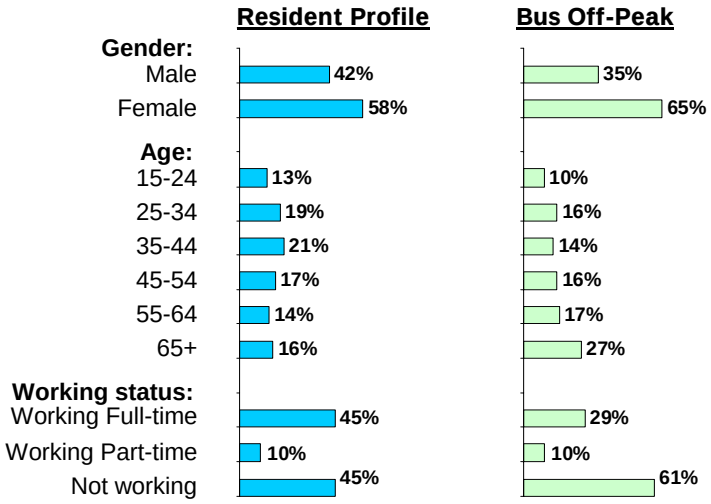
**** Profile of 1404 interviews achieved among local residents in the catchment area**

Sample profile – Peak-time bus users



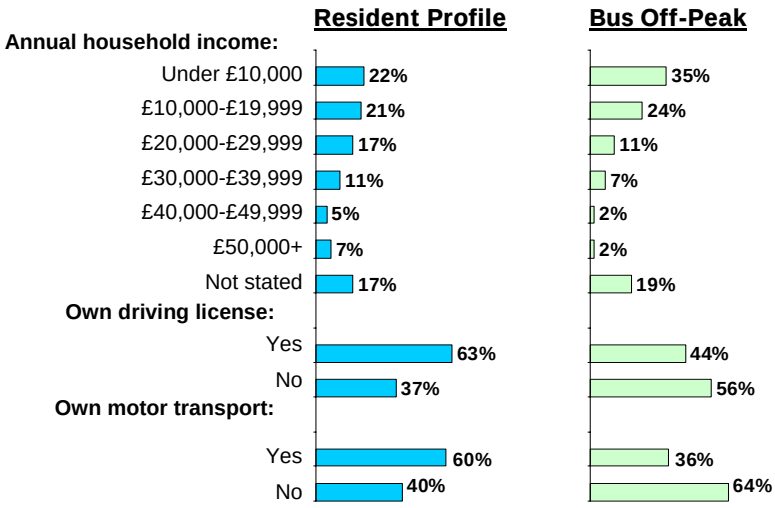
Base: All (1404)/ Bus-Peak (131)

Sample profile – Off-peak bus users



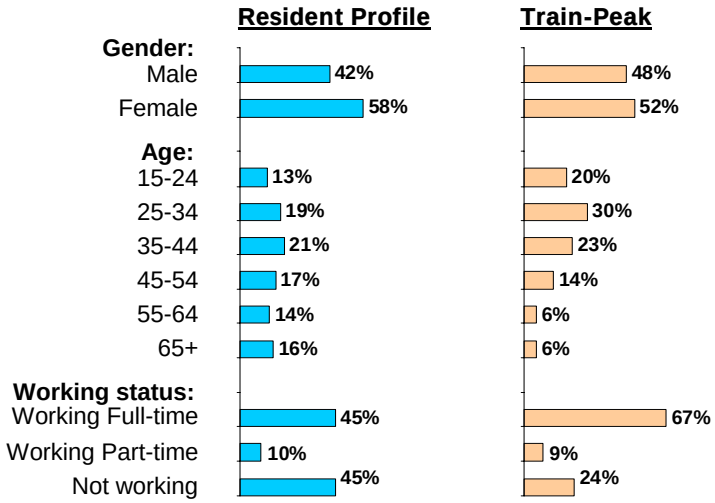
Base: All (1404)/ Bus-Off-peak (268)

Sample profile – Off-peak bus users



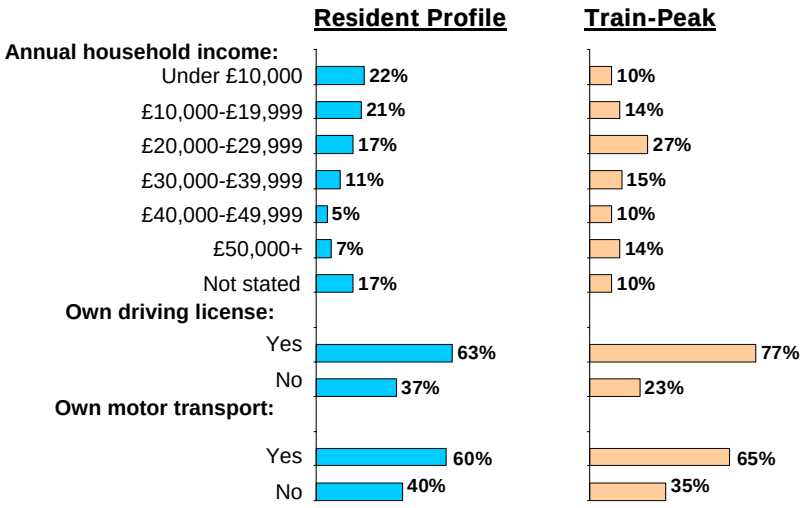
Base: All (1404)/ Bus-Off-peak (268)

Sample profile – Peak-time train users



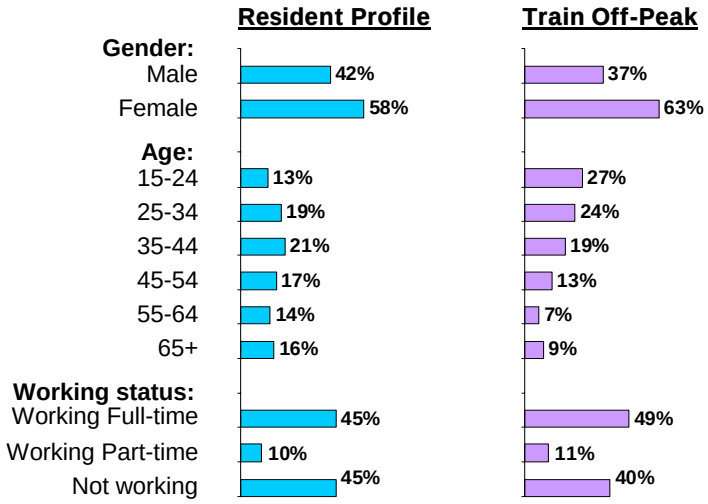
Base: All (1404)/ Train peak (94)

Sample profile – Peak-time train users



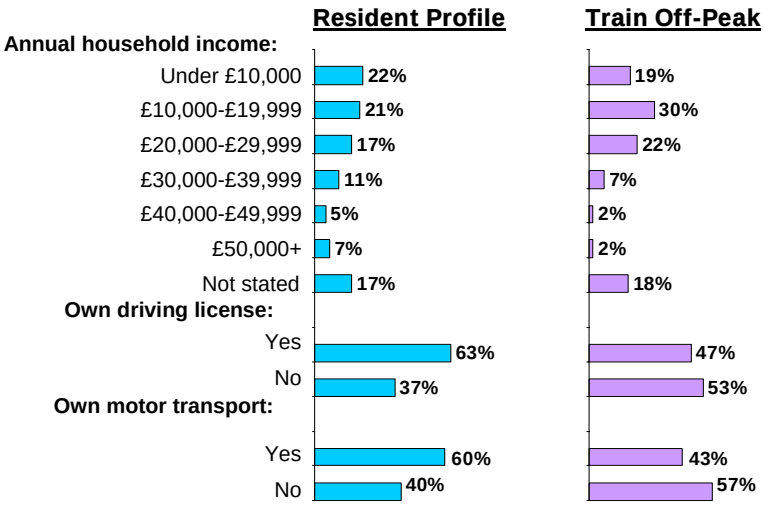
Base: All (1404)/ Train peak (94)

Sample profile – Off-peak train users



Base: All (1404)/ Train-Off-peak (160)

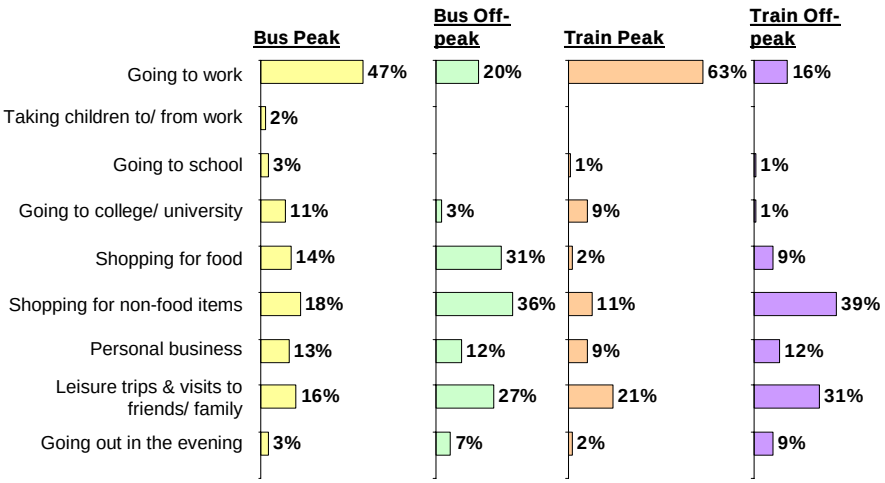
Sample profile – Off-peak train users



Base: All (1404)/ Train-Off-peak (160)

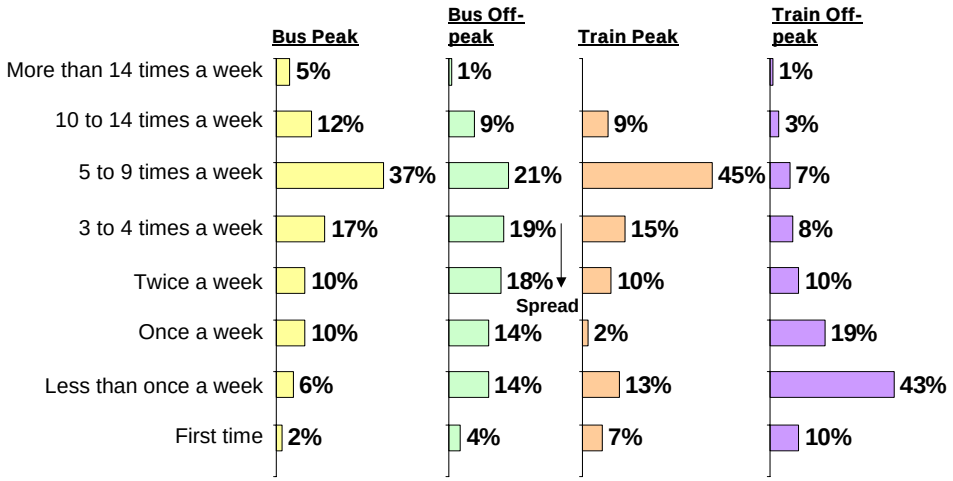
12 Appendix B: Typical journey profiles

Journey purpose



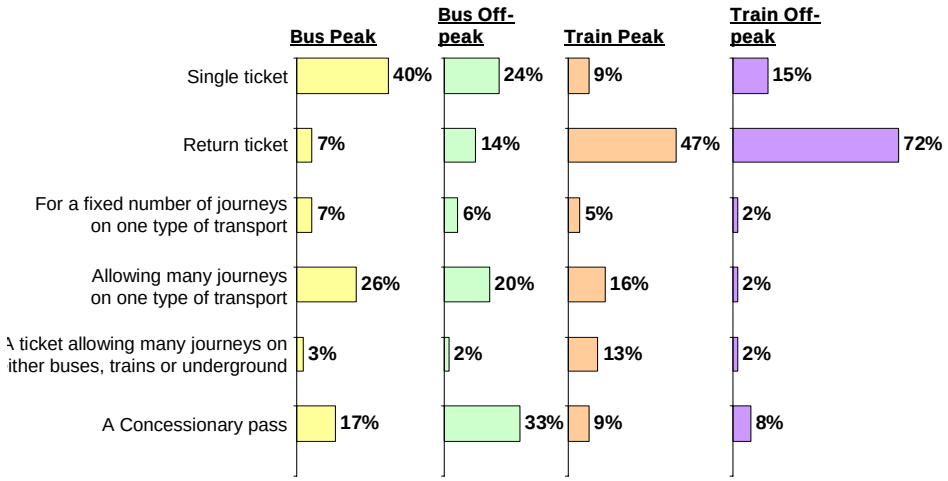
Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 140/ Train peak - 94/ Train off-peak - 103)

Journey frequency (outward journey)



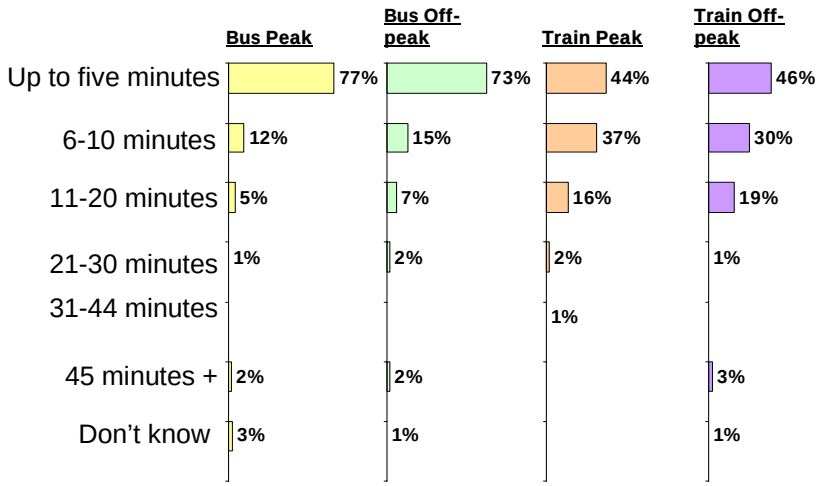
Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

Ticket type used



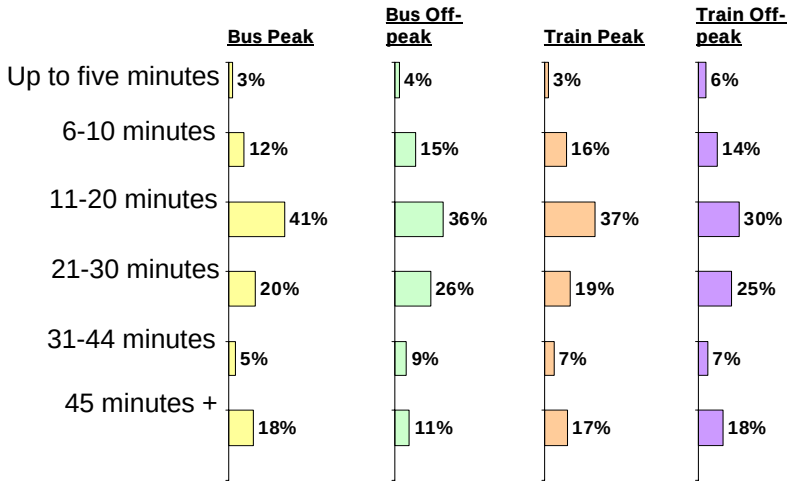
Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

Time to get to bus stop/train station



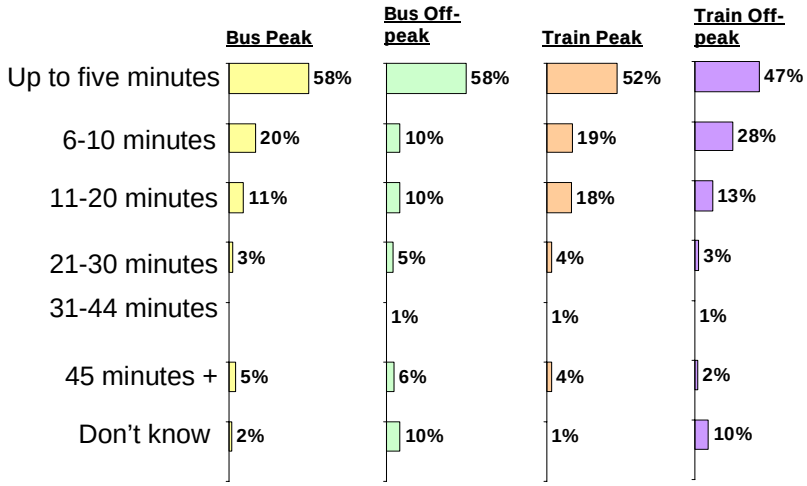
Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

Time on bus/train



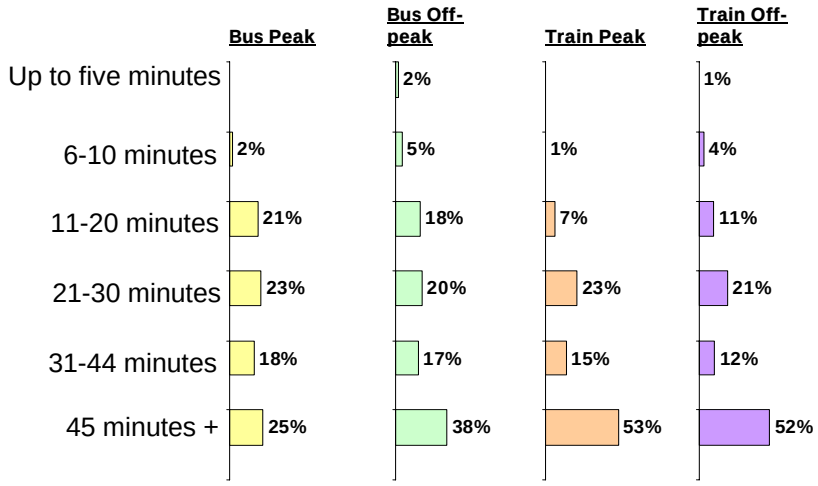
Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

Time to reach final destination upon completion of main journey



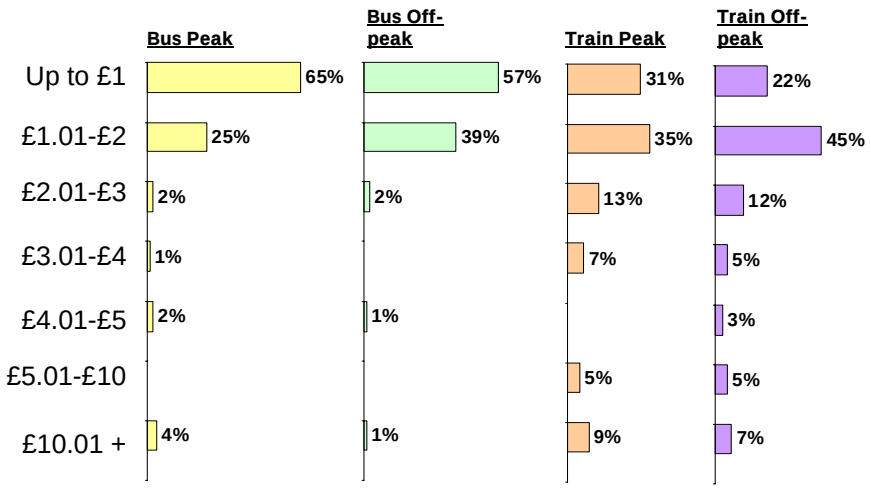
Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

Estimated total door to door journey time



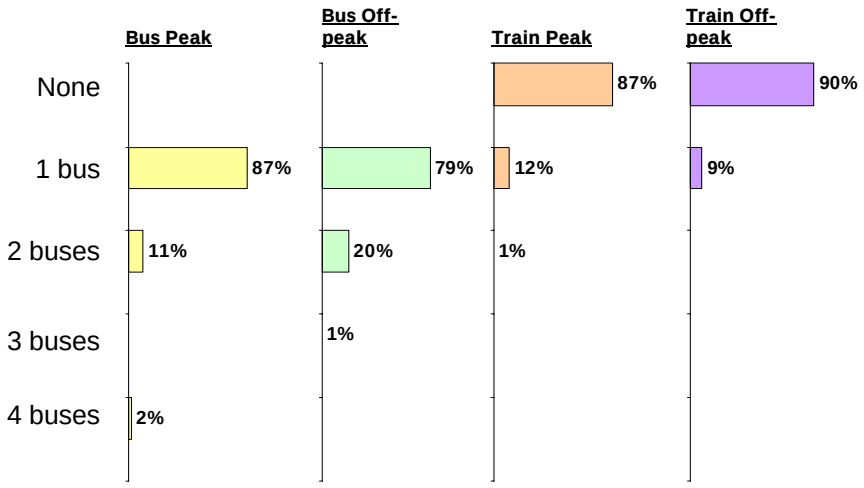
Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

Cost per journey



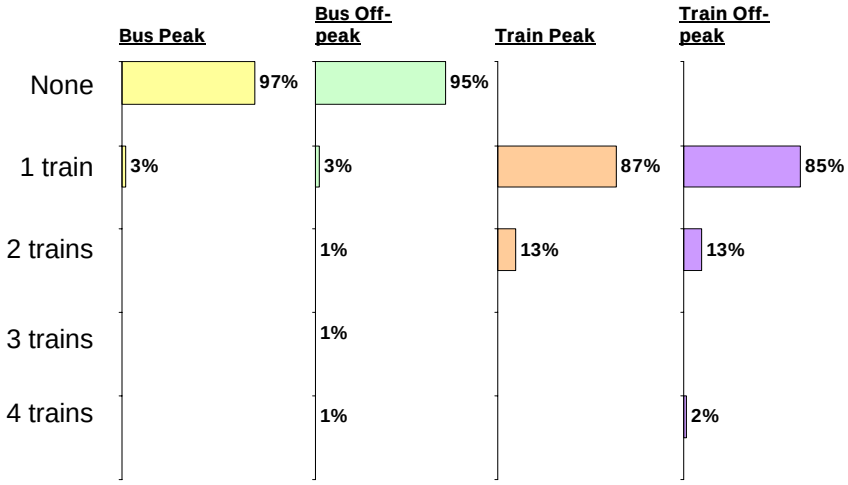
Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

Number of buses taken on outward journey



Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

Number of trains taken on outward journey



Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 102)

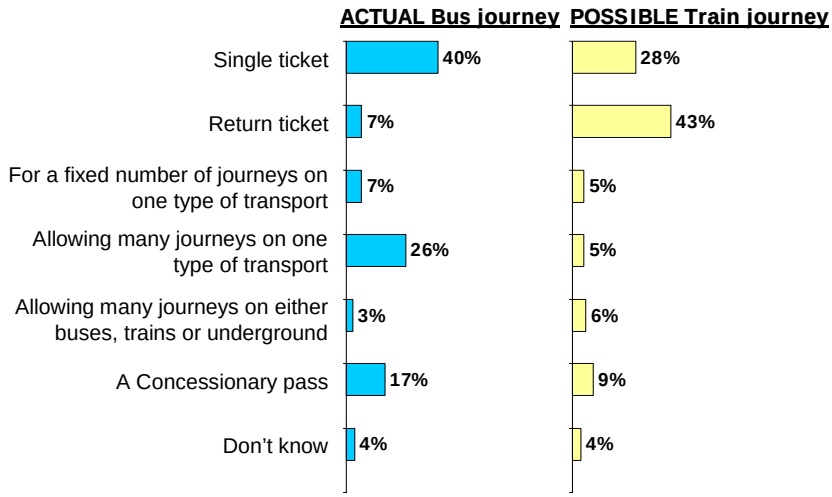
Appendix C: Alternative choice of journey

Explanation of charts

- Having described details of the journey they actually made, respondents were then asked to describe how they would make the same journey but by the alternative mode (train/ bus)

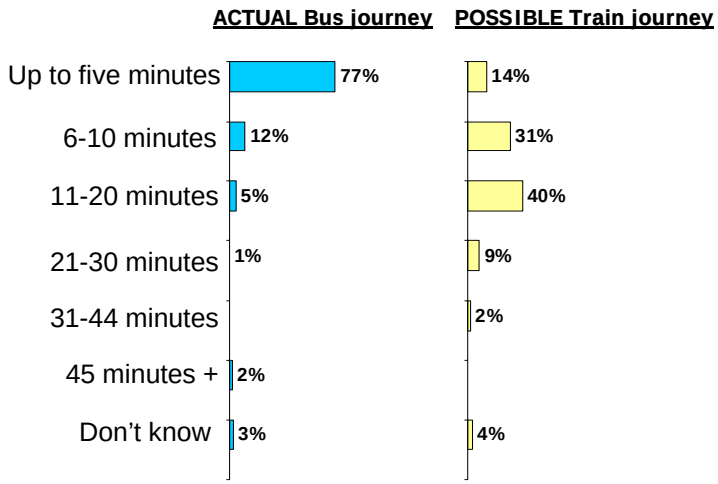
- Charts in this section show:
  - ACTUAL journey - the journey they actually made by their chosen method of transport
  - POSSIBLE journey - the journey they could have made by the alternative mode

Ticket type – Peak-time bus users



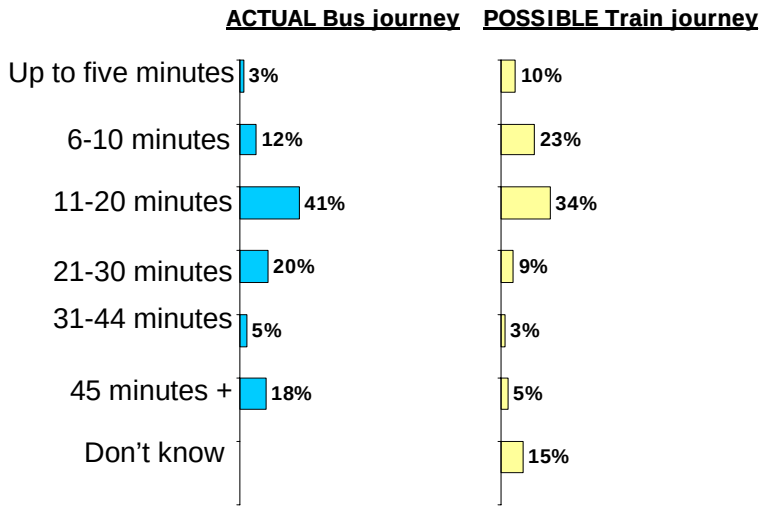
Base: All who made recent journey where had choice between bus and train (98)

Time to get to bus stop/train station – Peak-time bus users



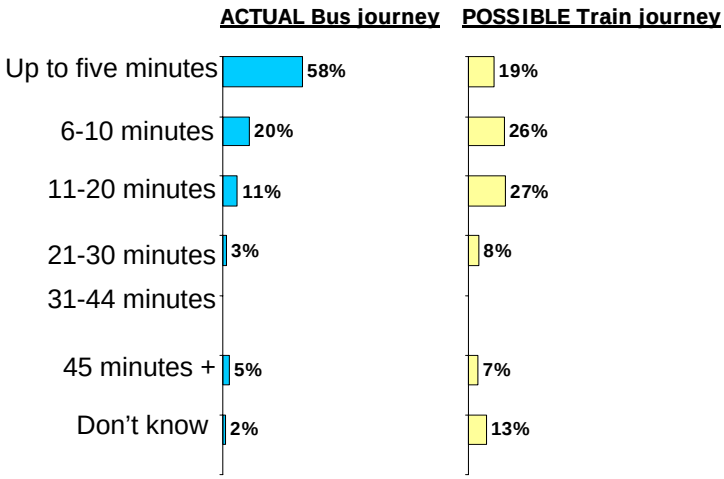
Base: All who made recent journey where had choice between bus and train (98)

Time on bus/train – Peak-time bus users



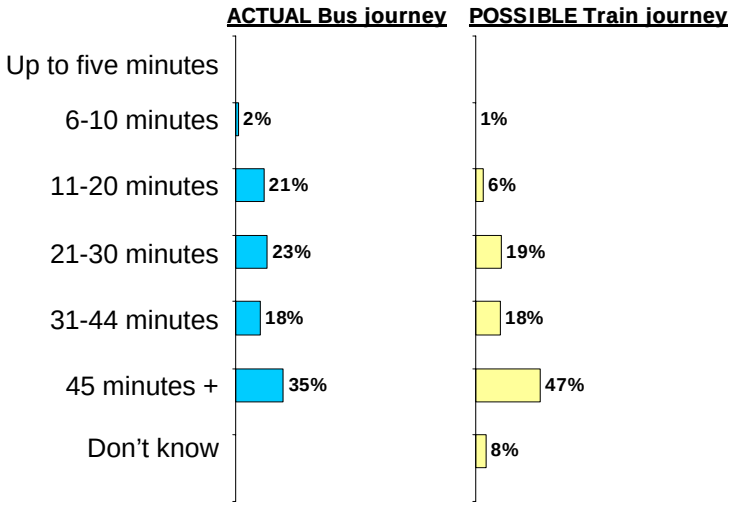
Base: All who made recent journey where had choice between bus and train (98)

Time to reach final destination upon completion of journey – Peak-time bus users



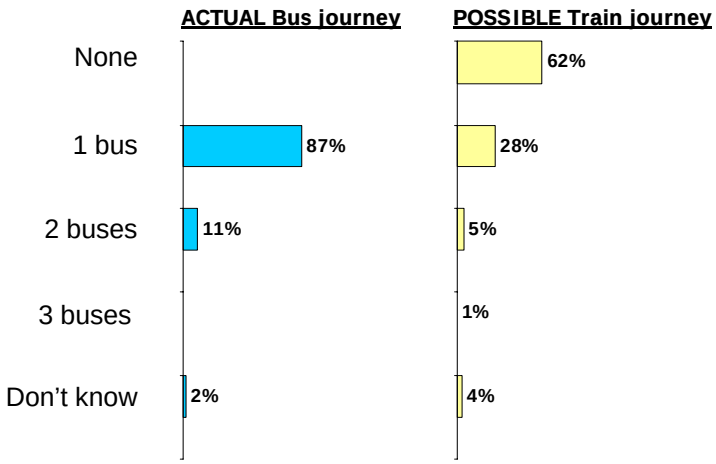
Base: All who made recent journey where had choice between bus and train (98)

Estimated total door to door journey time – Peak-time bus users



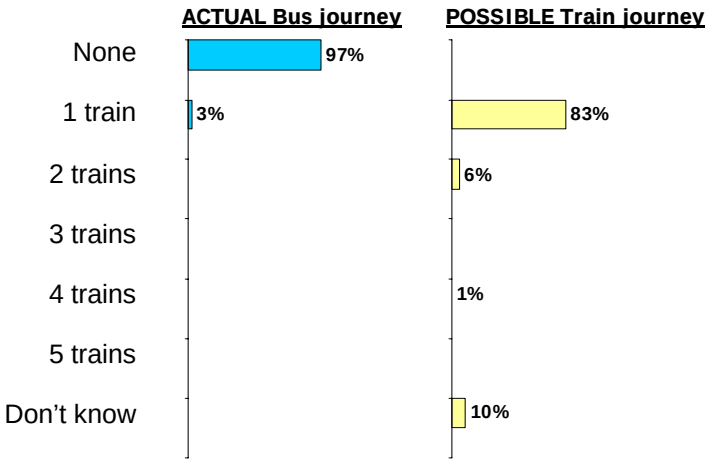
Base: All who made recent journey where had choice between bus and train (98)

Number of buses needed on outward journey – Peak-time bus users



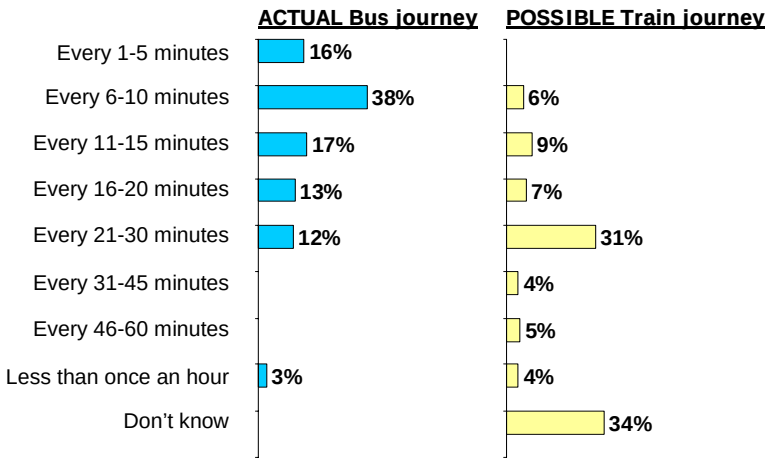
Base: All who made recent journey where had choice between bus and train (98)

Number of trains needed on outward journey – Peak-time bus users



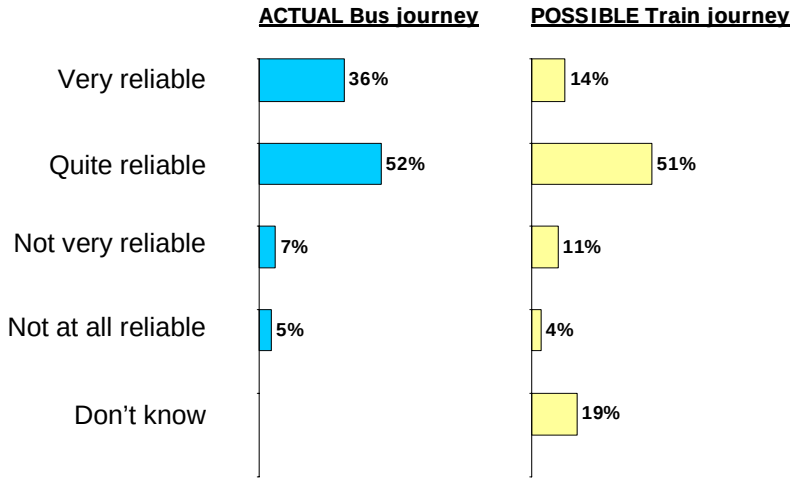
Base: All who made recent journey where had choice between bus and train (98)

Frequency of buses / trains – Peak-time bus users



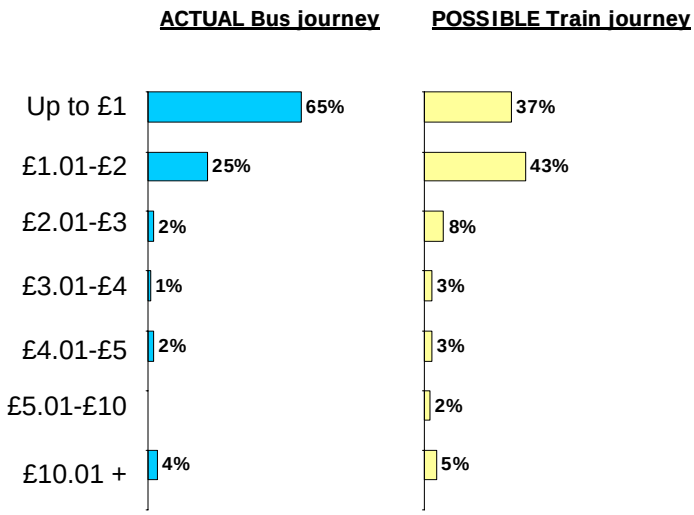
Base: All who made recent journey where had choice between bus and train (98)

Perceived reliability of buses/trains – Peak-time bus users



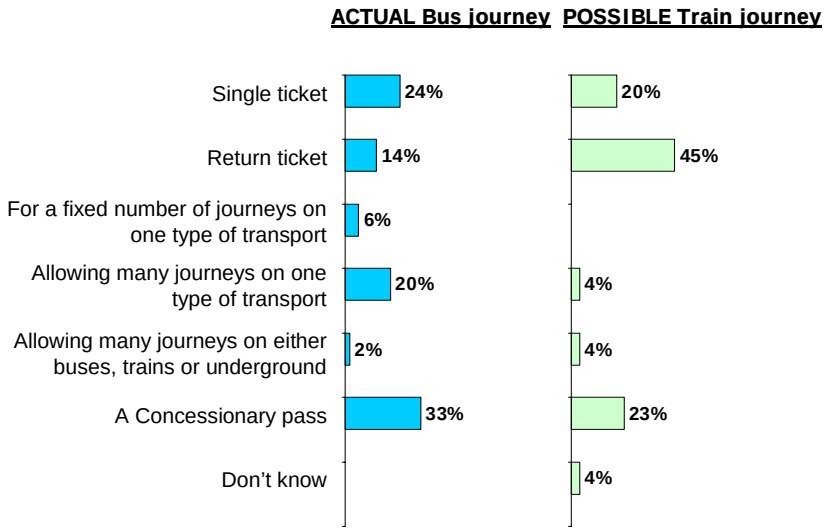
Base: All who made recent journey where had choice between bus and train (98)

Cost per journey made – Peak time bus users



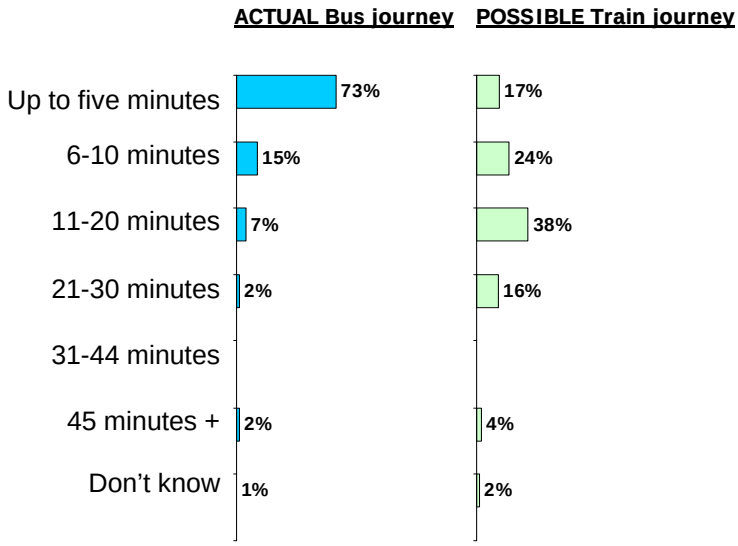
Base: All applicable (ACTUAL - 81/ POSSIBLE - 63)

Ticket type – Off-peak bus users



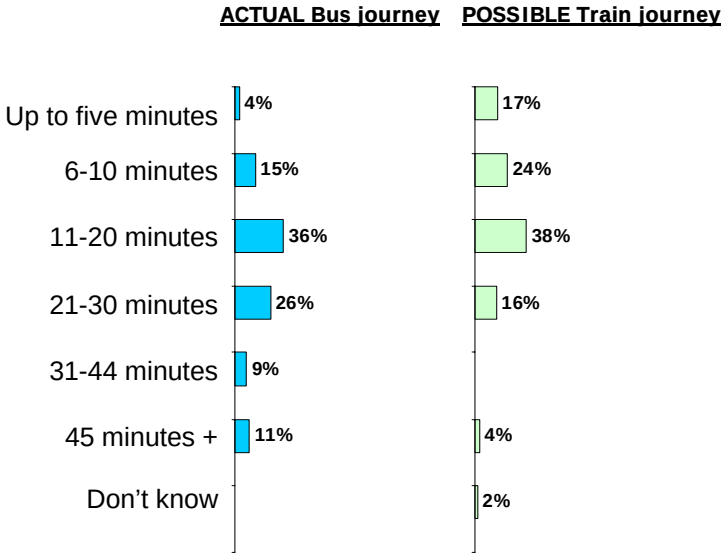
Base: All who made recent journey where had choice between bus and train (139)

Time to get to bus stop/train station – Off-peak bus users



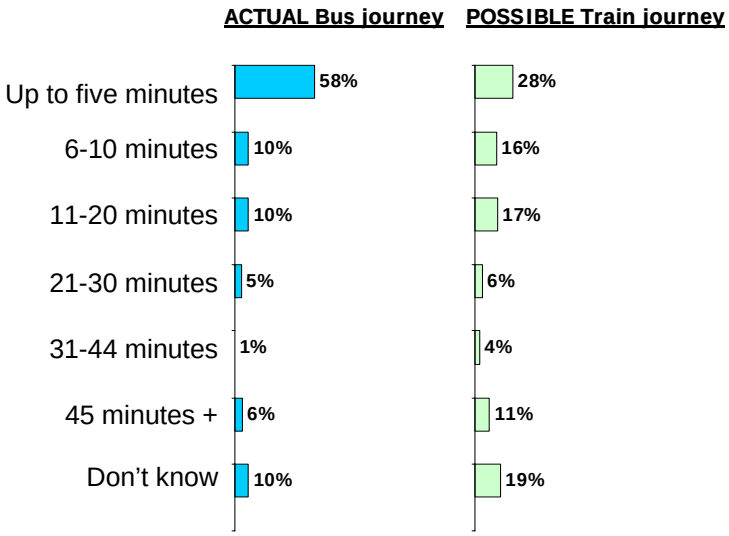
Base: All who made recent journey where had choice between bus and train (139)

Time on bus/train – Off-peak bus users



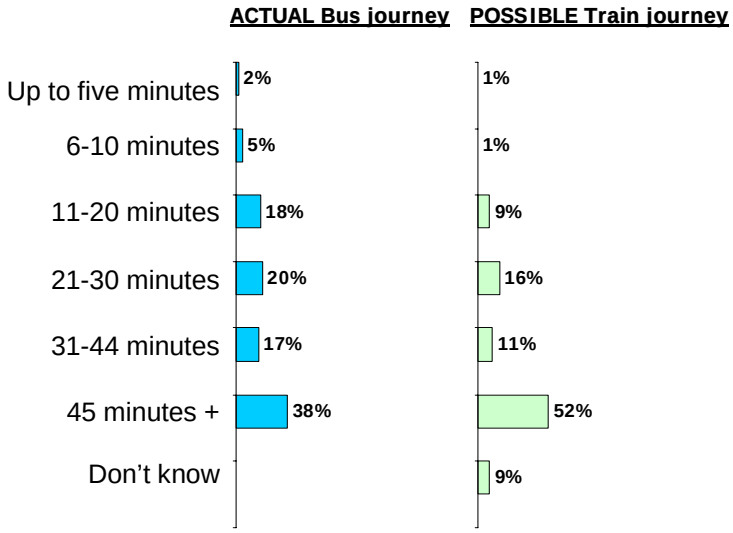
Base: All who made recent journey where had choice between bus and train (139)

Time to reach final destination upon completion of main journey – Off-peak bus users



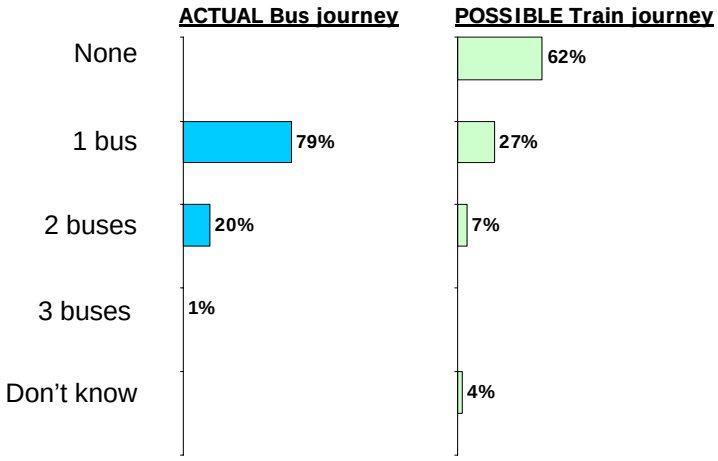
Base: All who made recent journey where had choice between bus and train (139)

Estimated total door to door journey time – Off-peak bus users



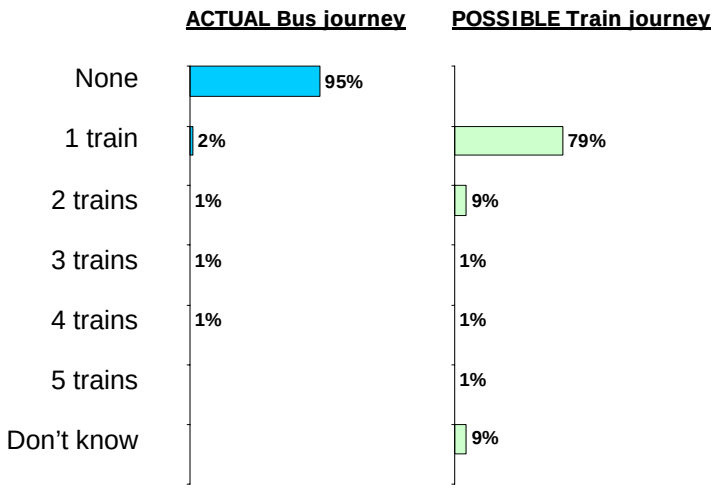
Base: All who made recent journey where had choice between bus and train (139)

Number of buses needed on outward journey – Off-peak bus users



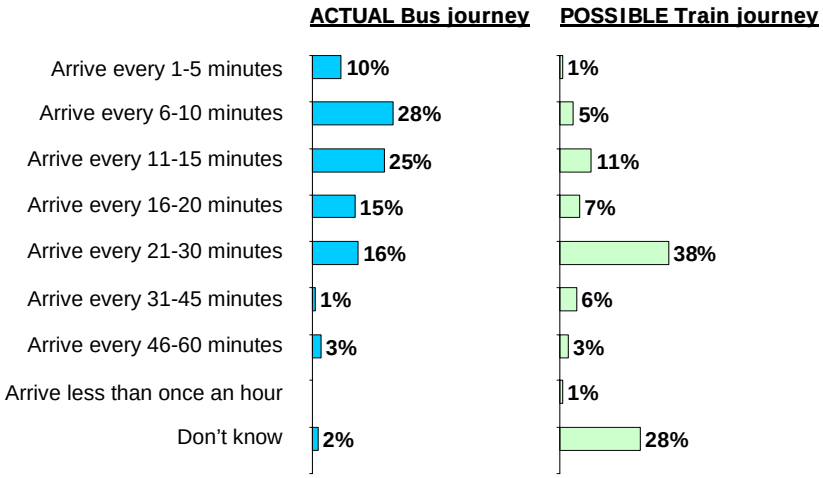
Base: All who made recent journey where had choice between bus and train (139)

Number of trains needed on outward journey – Off-peak bus users



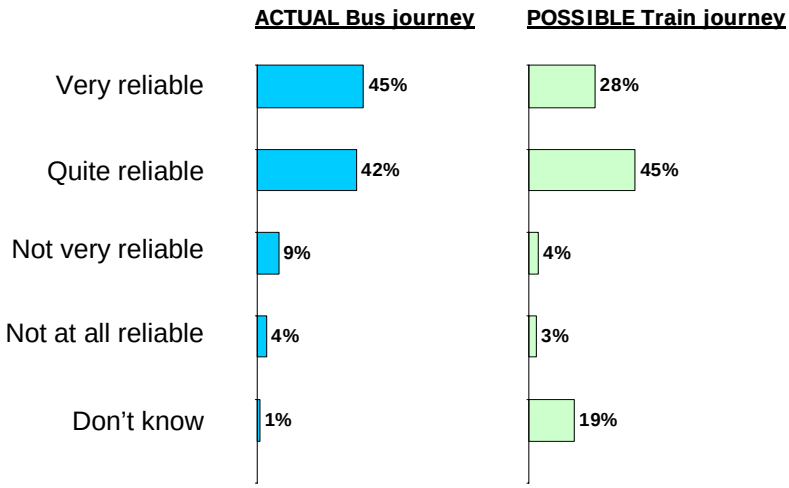
Base: All who made recent journey where had choice between bus and train (139)

Frequency of buses / trains – Off-peak bus users



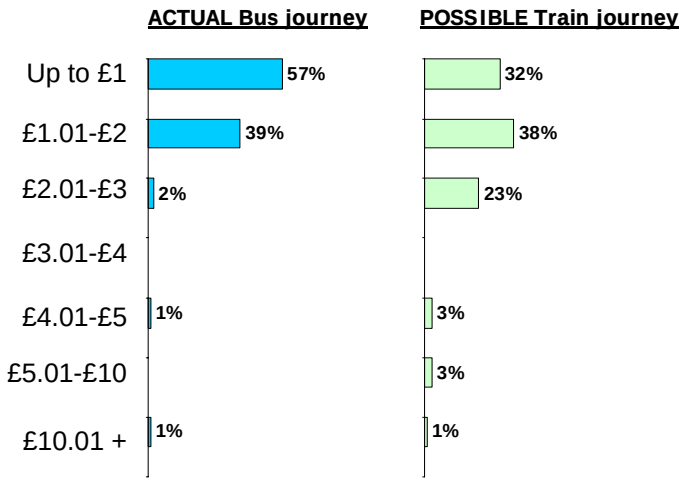
Base: All who made recent journey where had choice between bus and train (139)

Perceived reliability of buses / trains – Off-peak bus users



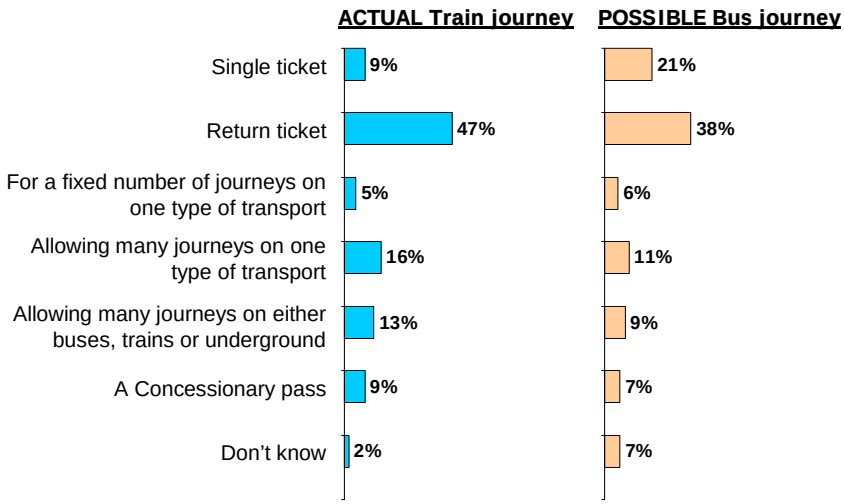
Base: All who made recent journey where had choice between bus and train (139)

Cost per journey made – Off-peak bus users



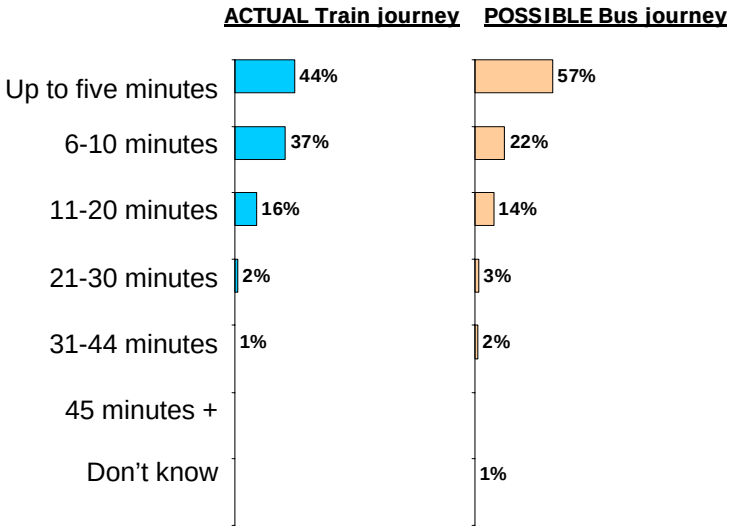
Base: All applicable (ACTUAL - 88/ POSSIBLE - 74)

Ticket type – Peak-time train users



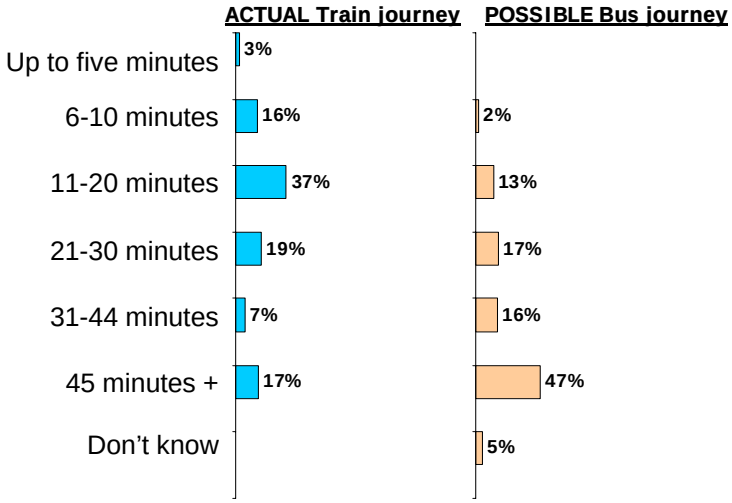
Base: All who made recent journey where had choice between bus and train (94)

Time to get to bus stop / train station – Peak-time train users



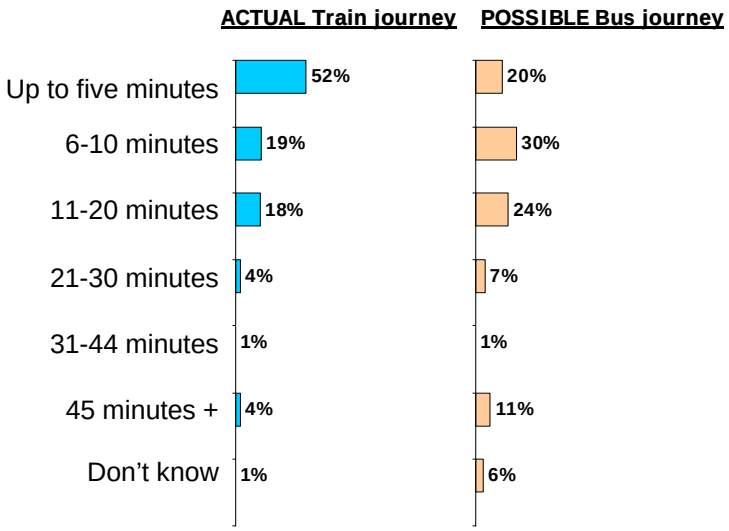
Base: All who made recent journey where had choice between bus and train (94)

Time on bus / train - Peak-time Train Users



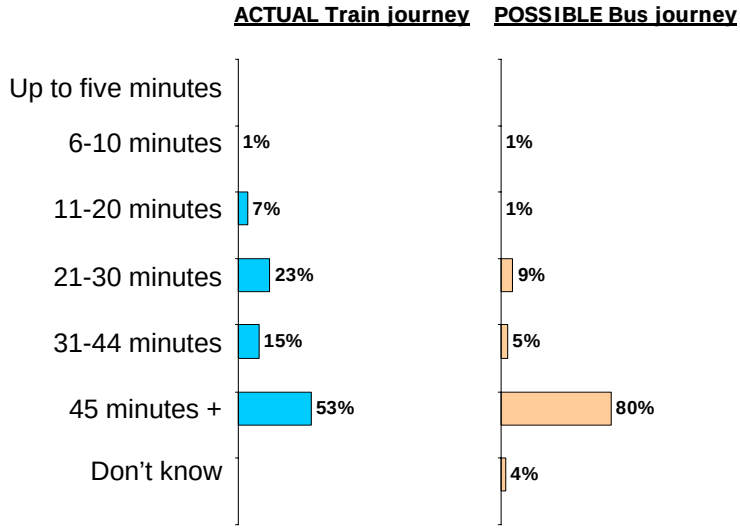
Base: All who made recent journey where had choice between bus and train (94)

Time to reach final destination upon completion of main journey - peak-time train users



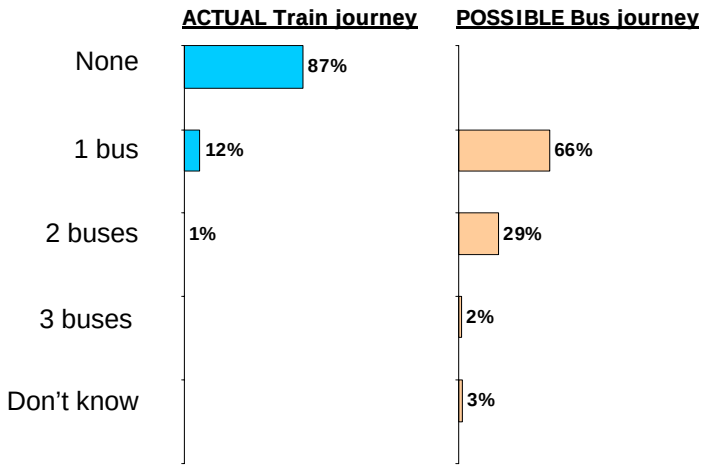
Base: All who made recent journey where had choice between bus and train (94)

Estimated total door to door journey time – Peak-time train users



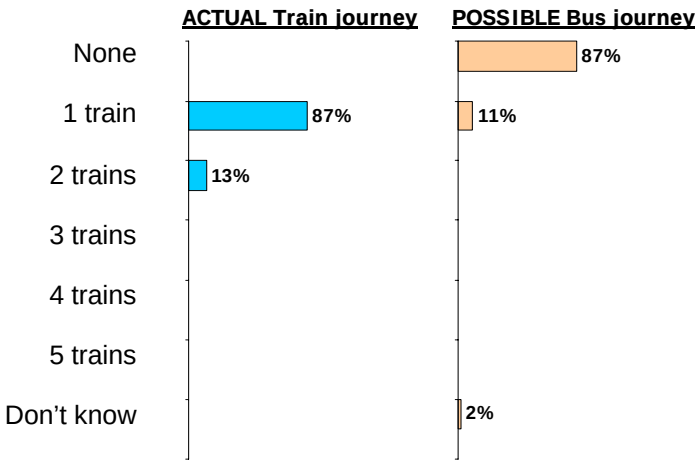
Base: All who made recent journey where had choice between bus and train (94)

Number of buses needed on outward journey – Peak-time train users



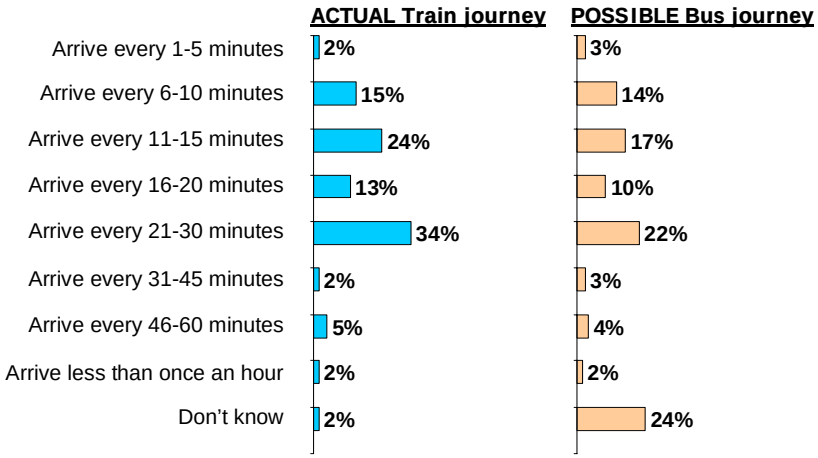
Base: All who made recent journey where had choice between bus and train (94)

Number of trains needed on outward journey - Peak-time Train Users



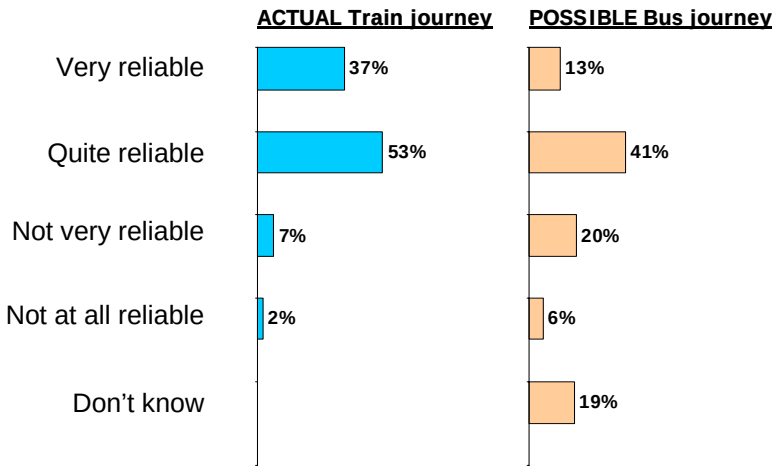
Base: All who made recent journey where had choice between bus and train (94)

Frequency of buses/ trains - Peak-time Train Users



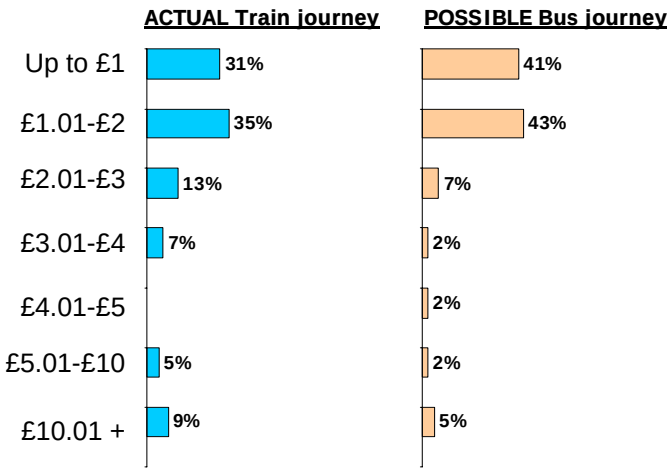
Base: All who made recent journey where had choice between bus and train (94)

Perceived reliability of buses/ trains - Peak-time Train Users



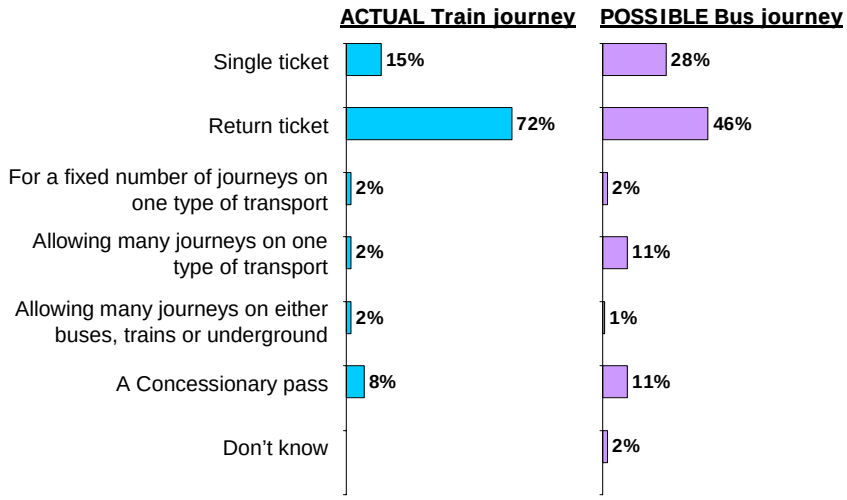
Base: All who made recent journey where had choice between bus and train (94)

Cost per journey made - Peak-time Train Users



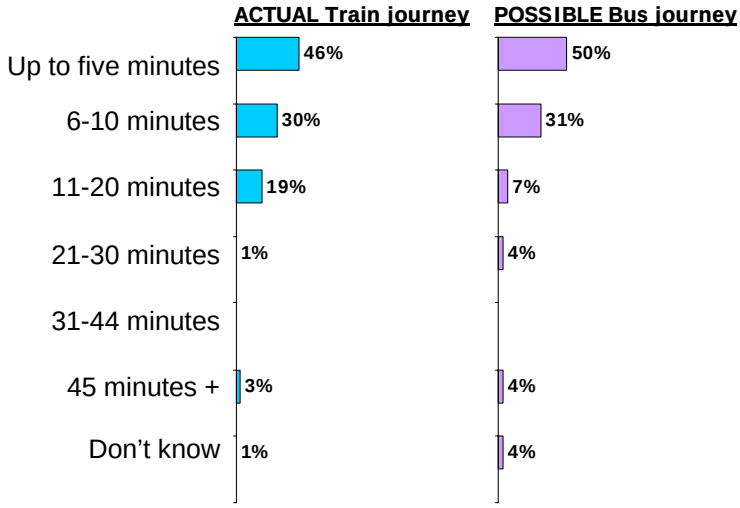
Base: All applicable (ACTUAL - 85/ POSSIBLE - 61)

Ticket type - Off-peak train users



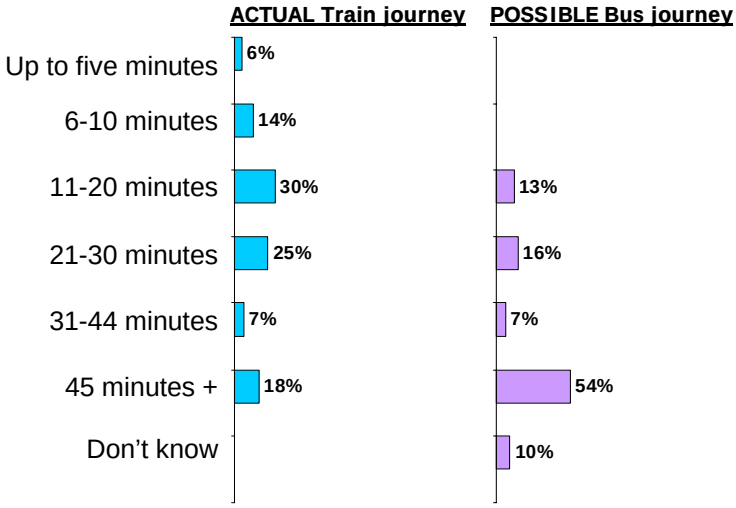
Base: All who made recent journey where had choice between bus and train (102)

Time to get to bus stop/ train station - Off-peak train users



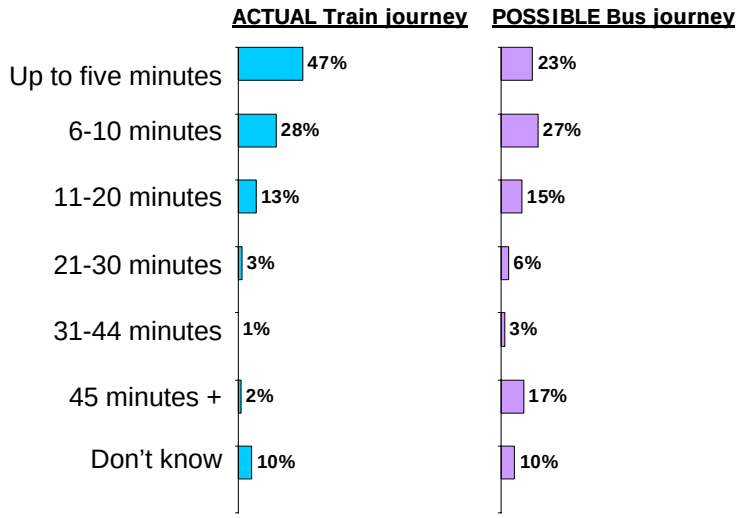
Base: All who made recent journey where had choice between bus and train (102)

Time on bus / train - Off-peak train users



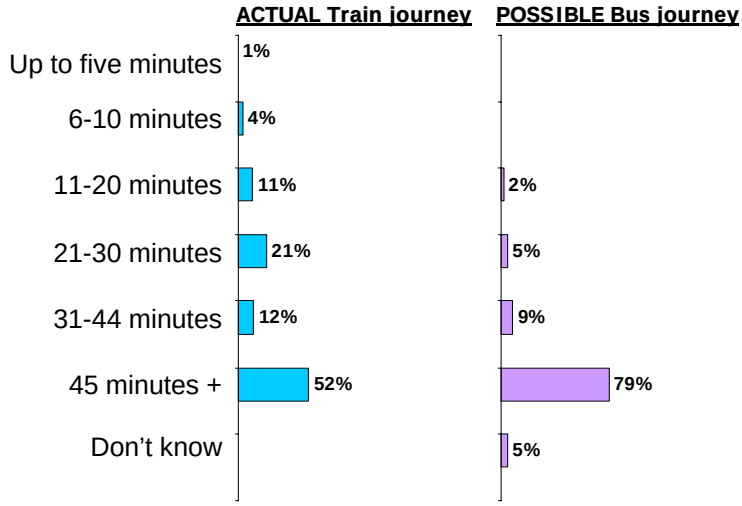
Base: All who made recent journey where had choice between bus and train (102)

Time to reach final destination upon completion of main journey - Off-peak train users



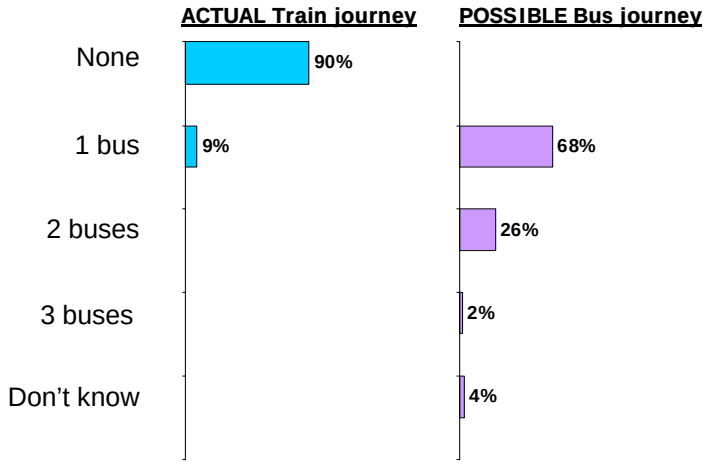
Base: All who made recent journey where had choice between bus and train (102)

Estimated total door to door journey time - Off-peak train users



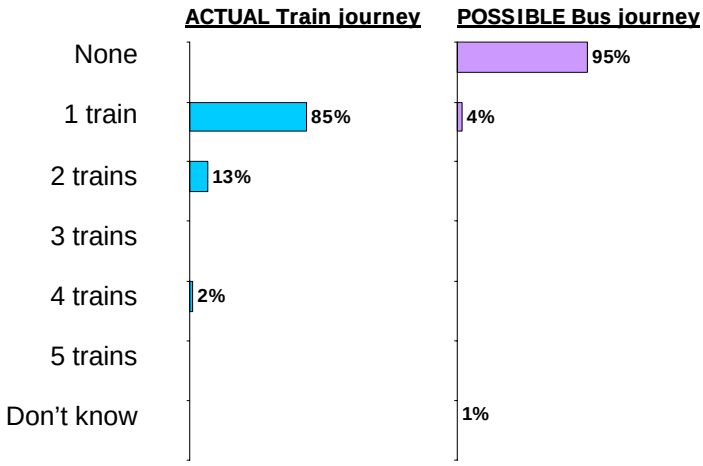
Base: All who made recent journey where had choice between bus and train (102)

Number of buses needed on outward journey - Off-peak train users



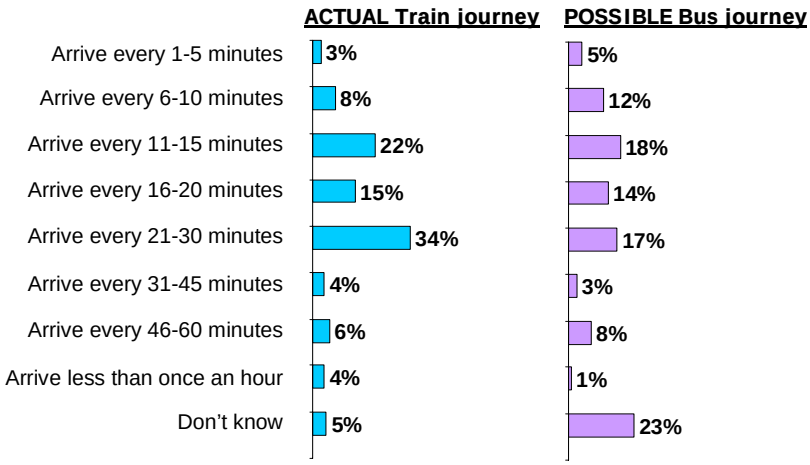
Base: All who made recent journey where had choice between bus and train (102)

Number of trains needed on outward journey - Off-peak train users



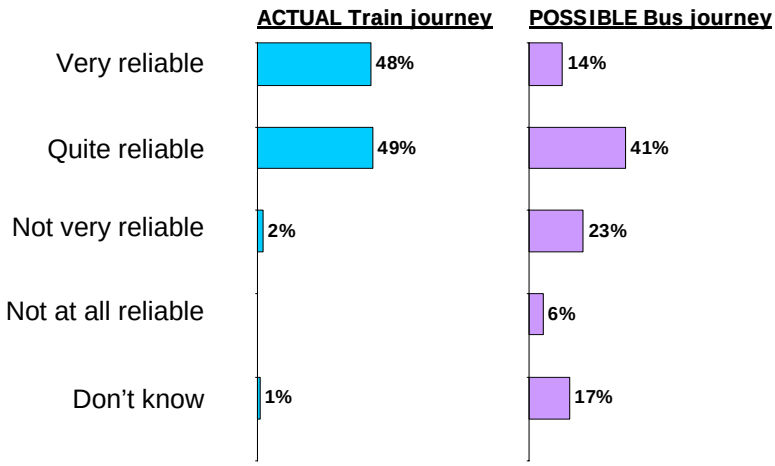
Base: All who made recent journey where had choice between bus and train (102)

Frequency of buses/ trains - Off-peak train users



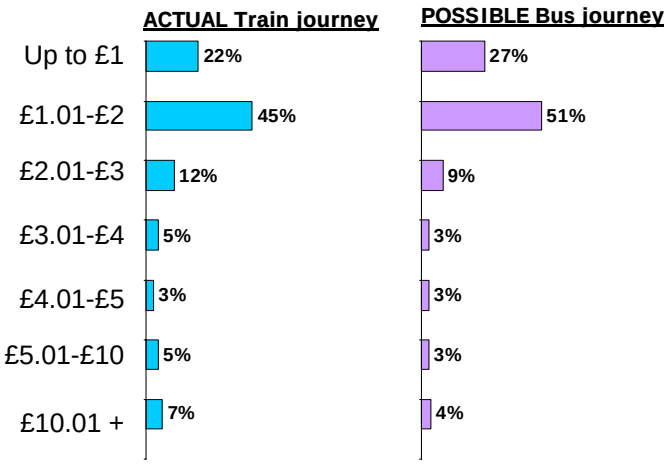
Base: All who made recent journey where had choice between bus and train (102)

Perceived reliability of buses/ trains - Off-peak train users



Base: All who made recent journey where had choice between bus and train (102)

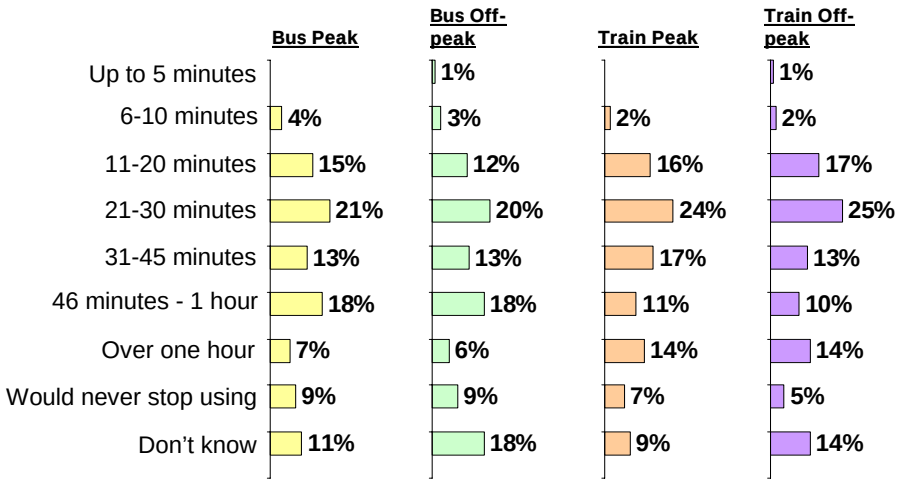
Cost per journey made - Off-peak train users



Base: All applicable (ACTUAL - 432/ POSSIBLE - 81)

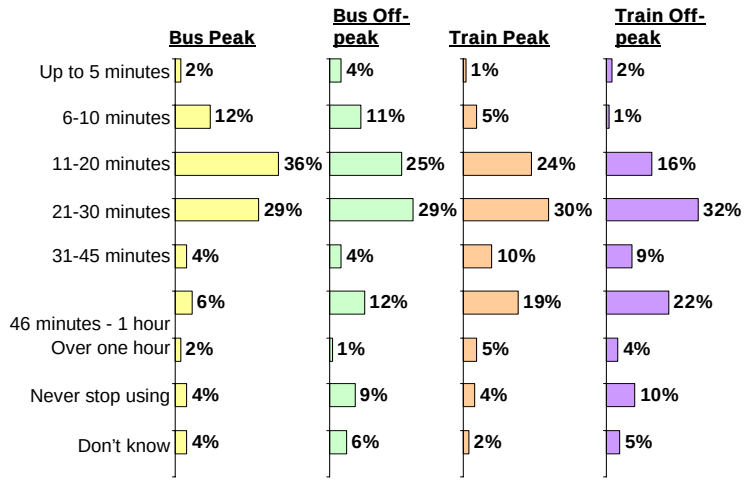
Appendix D: Triggers for change of behaviour

Maximum journey time would accept before stop using bus/rail



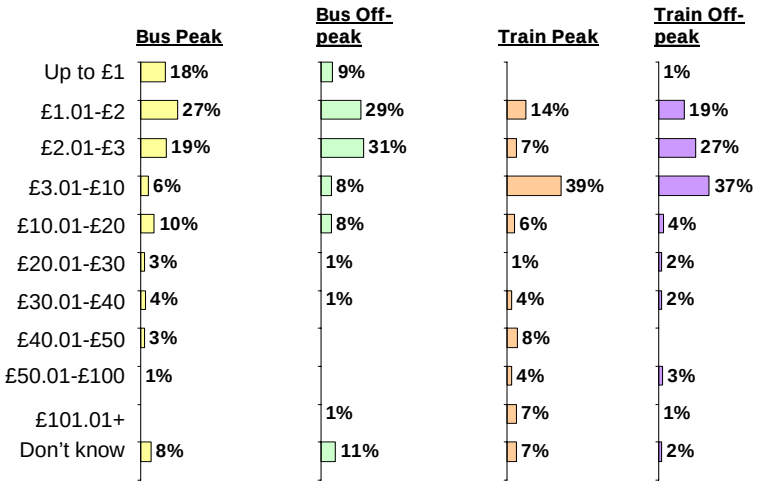
Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 101)

Minimum service frequency would accept before stop using bus/rail



Base: All who made recent journey where had choice between bus and train
(Bus peak - 98/ Bus off-peak - 139/ Train peak - 94/ Train off-peak - 101)

Maximum ticket price would accept before stop using bus/rail



Base: All who used a non multi-mode ticket for recent journey (Bus peak - 78/ Bus off-peak - 90/ Train peak - 72/ Train off-peak - 91)