



Market Research in connection with The National Express Group's Anticipated Acquisition of The Thameslink and Great Northern Rail Franchise: Merger Inquiry

Submitted to

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1 Introduction

Background and objectives

The Competition Commission are conducting an investigation into the anticipated acquisition of the Thameslink and Great Northern rail franchise by National Express Group (NEG). The Competition Commission were asked to consider whether the acquisition may result in a substantial lessening of competition in the supply of passenger transport services on the rail routes covered by the Thameslink and Great Northern franchise.

The Competition Commission are particularly interested in passengers travelling between London and Gatwick on the Gatwick Express (GEX) and Thameslink trains.

The Competition Commission asked ORC International to carry out quantitative market research in order to understand passengers' experience of the Gatwick Express and Thameslink services between London and Gatwick and collect information on competitive constraints.

This report presents findings from the market research conducted as part of the aforementioned investigation.

2 Methodology and Sample

Methodology

A total of 1177 questionnaires were completed between the 15th and 21st September 2005. A self completion questionnaire was handed out by ORC International interviewers to passengers willing to take part on both Gatwick Express and Thameslink trains between central London and Gatwick Airport. The same questionnaire was used for both train services. Questionnaires were handed out to passengers between 7.30am to 7pm, on each day of the fieldwork period, including the weekend, for both the Gatwick Express and the Thameslink service.

All passengers over the age of 16 travelling between central London and Gatwick Airport were eligible for the survey, except for those who had bought their rail ticket for the journey as part of a package. The questionnaire was translated into French, German, Italian and Spanish.

The majority of questionnaires were collected by the interviewers during the train journey. However, where respondents felt they did not have enough time to complete the questionnaire a reply paid envelope, addressed to ORC International, was provided so that the questionnaire could be posted back to ORC International.

Prior to conducting the main fieldwork, a pilot study was conducted for the research on 7th September, to assess questionnaire length, comprehension and likely response rate.

Sample

27 interviewing shifts were completed in total, 10 of which were on the Gatwick Express services and 17 on the Thameslink trains. 826 questionnaires were collated from the Gatwick Express service and 351 from the Thameslink service. During the research period it was found that passenger numbers were lower on the Thameslink train service than the Gatwick Express service and that a large number of passengers on the Thameslink service were travelling beyond central London or Gatwick Airport and therefore not eligible for this study.

Questionnaires were handed out on both directions of the journey. A total of 606 respondents completed the questionnaire travelling from Gatwick to central London and 571 respondents completed the questionnaire travelling from central London to Gatwick. Table 1 indicates the times of day respondents stated they had departed from Gatwick or London.

Table 1: Times of day travelling

Departure time from Gatwick or London	% travelling at this time (n=1177)
7 – 8.59 am	20%
9 – 11.59 am	34%
12 – 1.59 pm	20%
2 – 4.59 pm	21%
5 – 6.59 pm	1%
7 – 8.59 pm	-
9 – 11.59 pm	-
12 – 6.59 am	3%
Don't know / Not answered*	3%

* As this was a self completion questionnaire not all respondents provided an answer to this question

The following numbers of completed questionnaires were received in other European languages;

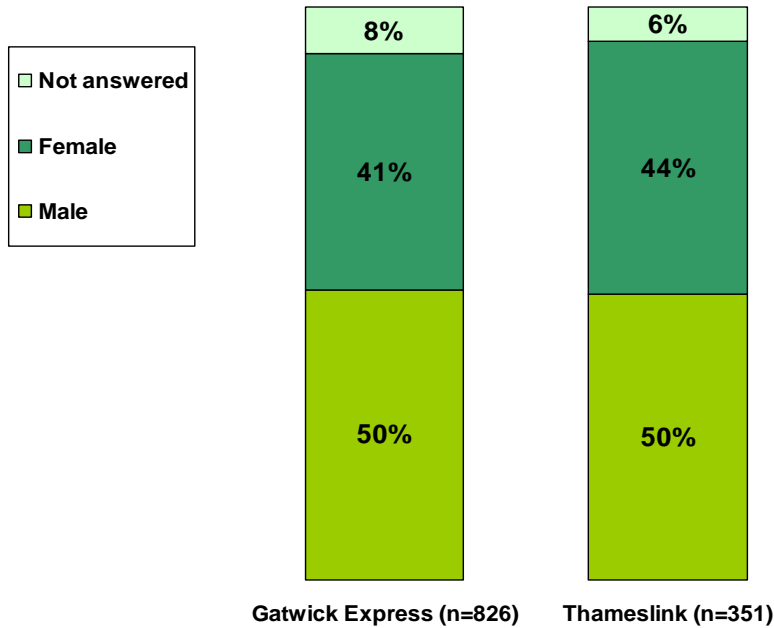
- 20 French questionnaires
- 12 German questionnaires
- 18 Italian questionnaires
- 42 Spanish questionnaires

3 Respondent Profile

Respondent Profile

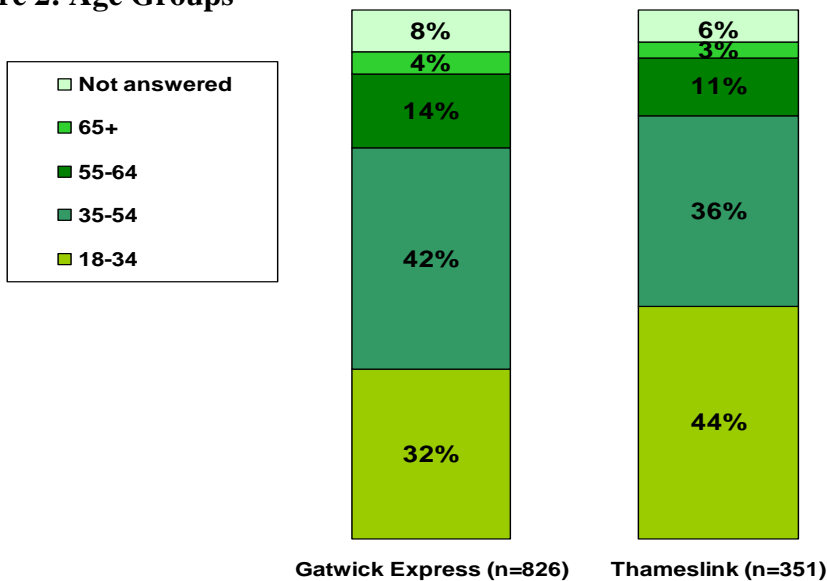
Almost equal proportions of passengers were male and female across the two services.

Figure 1: Gender



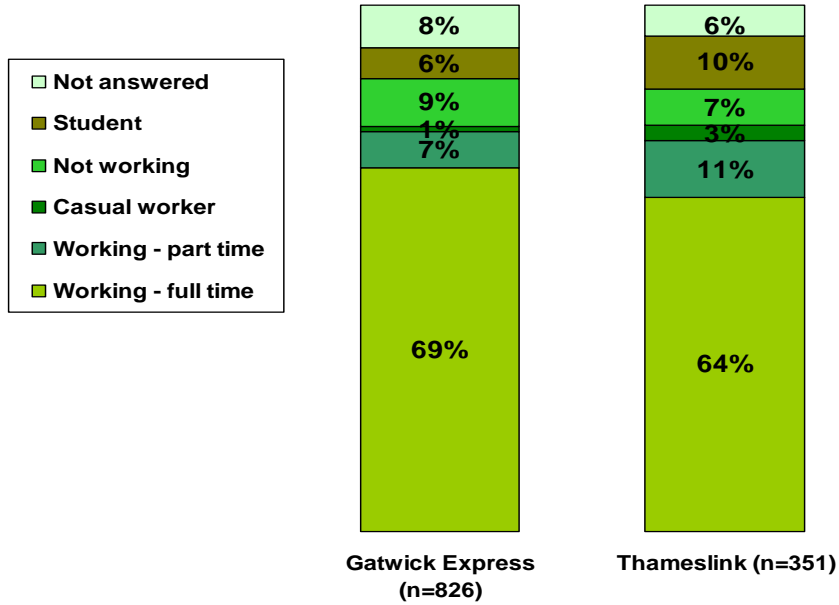
Thameslink passengers interviewed in this survey had a slightly younger profile with 44% aged 18-34, compared to almost a third (32%) of Gatwick Express passengers within this age group.

Figure 2: Age Groups



There were few differences in the working status of passengers between the two services. Around two thirds of passengers worked full time.

Figure 3: Working Status



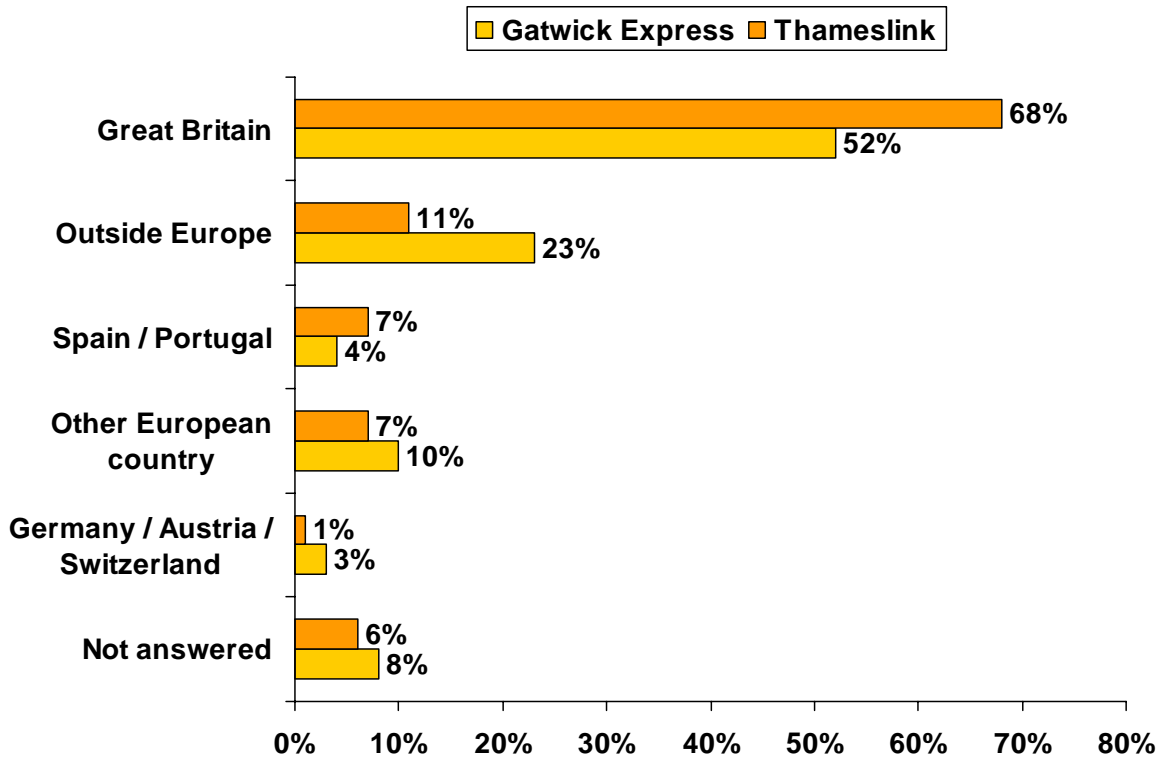
60% of respondents were travelling with one other adult in the group. Table 2 below shows the breakdown of the total number of adults and children travelling in each party.

Table 2: Total number in travelling party

Number in party	Adults (16+)	Children (0-4 years)	Children (5-15 years)
0	4%	99%	98%
1	60%	1%	1%
2	27%	-	1%
3	4%	-	-
4+	5%	-	-

Thameslink passengers were more likely to be residents of Great Britain; 68% compared to 52% of Gatwick Express passengers. The Gatwick Express service was more likely to be used by those from outside Europe.

Figure 4: Country of residence



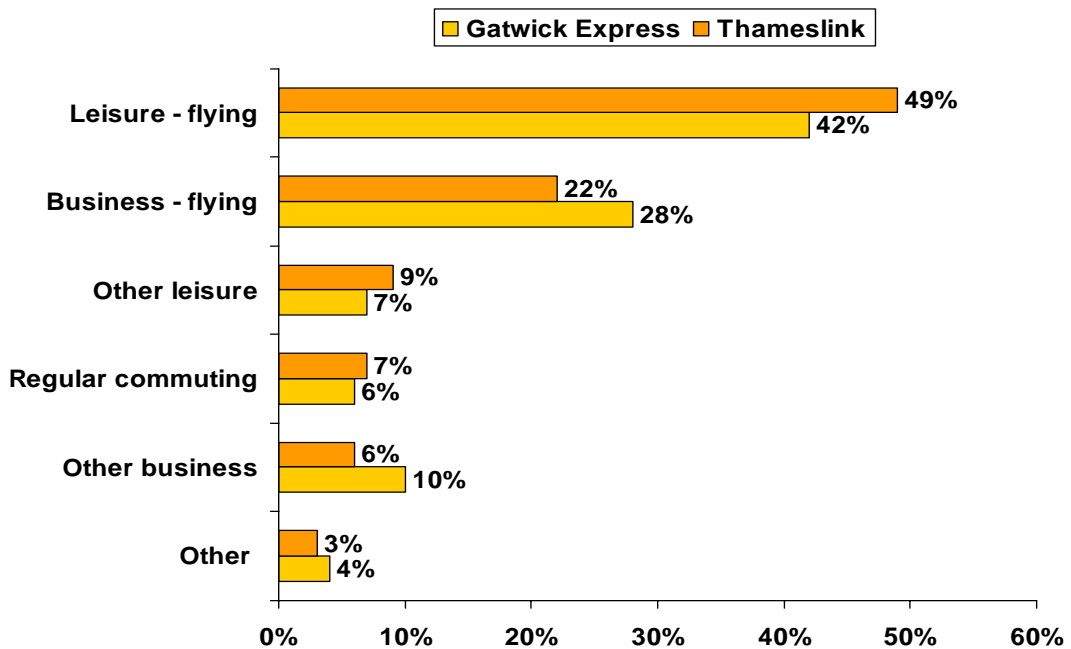
Bases: Gatwick Express = 826; Thameslink = 351

4 Journey Details

Purpose of journey

70% of all respondents were flying in or out of Gatwick Airport. Around half of these passengers were flying for leisure and the remainder for business. There were few differences between purpose of the journey for either Thameslink or Gatwick Express passengers.

Figure 5: Purpose of Journey



Bases: Gatwick Express = 826; Thameslink = 351

Frequency of travel

Respondents were asked how often they travelled between London and Gatwick Airport by all forms of transport and all routes. 30% of all passengers said they travelled between Gatwick and London at least once a month. 27% said they travelled at least once every 6 months, 12% once a year and a further 12% travelled less than once a year. For 20% of passengers it was the first time they had travelled between central London and Gatwick. This profile was very similar for both the Gatwick Express and Thameslink services (see Figure 6 for further details by train operator).

Respondents were also asked how frequently they travelled between London and Gatwick by the particular train route they were using that day. This travel frequency data, (shown in Figure 7) might suggest passengers tend to use the same service each time they travel this journey between central London and Gatwick Airport.

Figure 6: Travel frequency between central London and Gatwick – By all modes

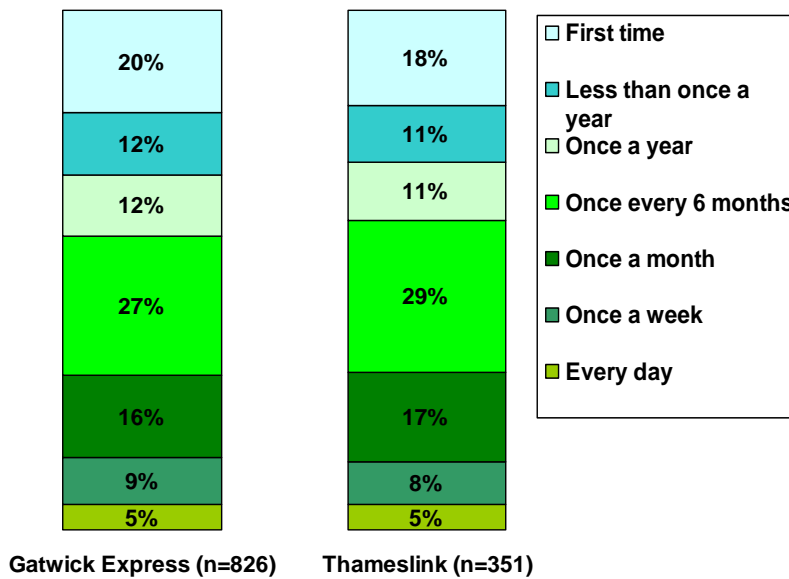
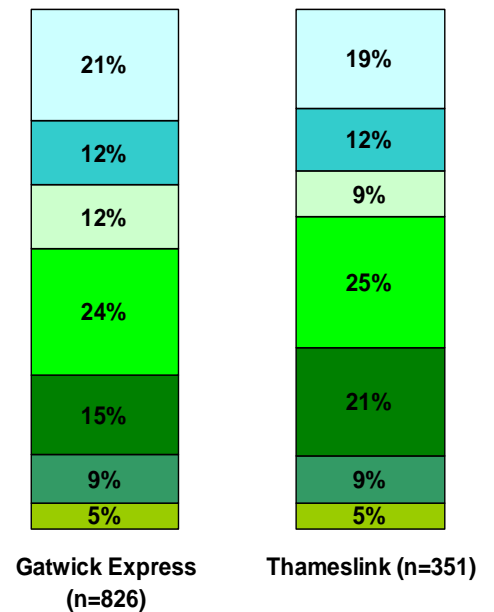


Figure 7: Travel frequency between central London and Gatwick – By particular train route



Destination and Origin

Destination and origin of journey influence which train service is used. Those starting or finishing their journey in west London were more likely to be using the Gatwick Express. This is exemplified by those travelling to and from postcode areas SW1, W1 and W2 who were significantly more likely to use the Gatwick Express. Those with journeys starting or finishing in the centre of London and to the east of London in postcode areas EC1, EC2, SE1 and WC1 were significantly more likely to use the Thameslink service.

Table 3: Journey Details – Origin and Destination Details

	Final Destination (Gatwick to London)		Starting Point (London to Gatwick)	
	Gatwick Express (n=420)	Thameslink (n=186)	Gatwick Express (n=406)	Thameslink (n=165)
Victoria / Kensington (SW1)	29%*	3%	33%*	1%
Outer London	14%	24%*	18%	25%
West End (W1)	14%*	1%	8%*	2%
City of London (EC2)	11%	13%	5%	13%*
Elsewhere in UK	6%	12%*	6%	15%
Southwark / Lambeth (SE1)	4%	13%*	3%	8%*
Kings Cross (WC1)	3%	7%*	3%	10%*
Paddington area (W2)	5%*	1%	6%	2%
Other	6%	13%	10%	13%
Covent Garden / Holborn (SW1)	4%	5%	4%	5%
Finsbury / Clerkenwell (EC1)	1%	2%	1%	5%*

*= Significant differences between Gatwick Express and Thameslink passengers

Overall estimated total journey time to the respondents final destination was given at less than 2 hours for the majority.

Table 4: Estimated total journey time

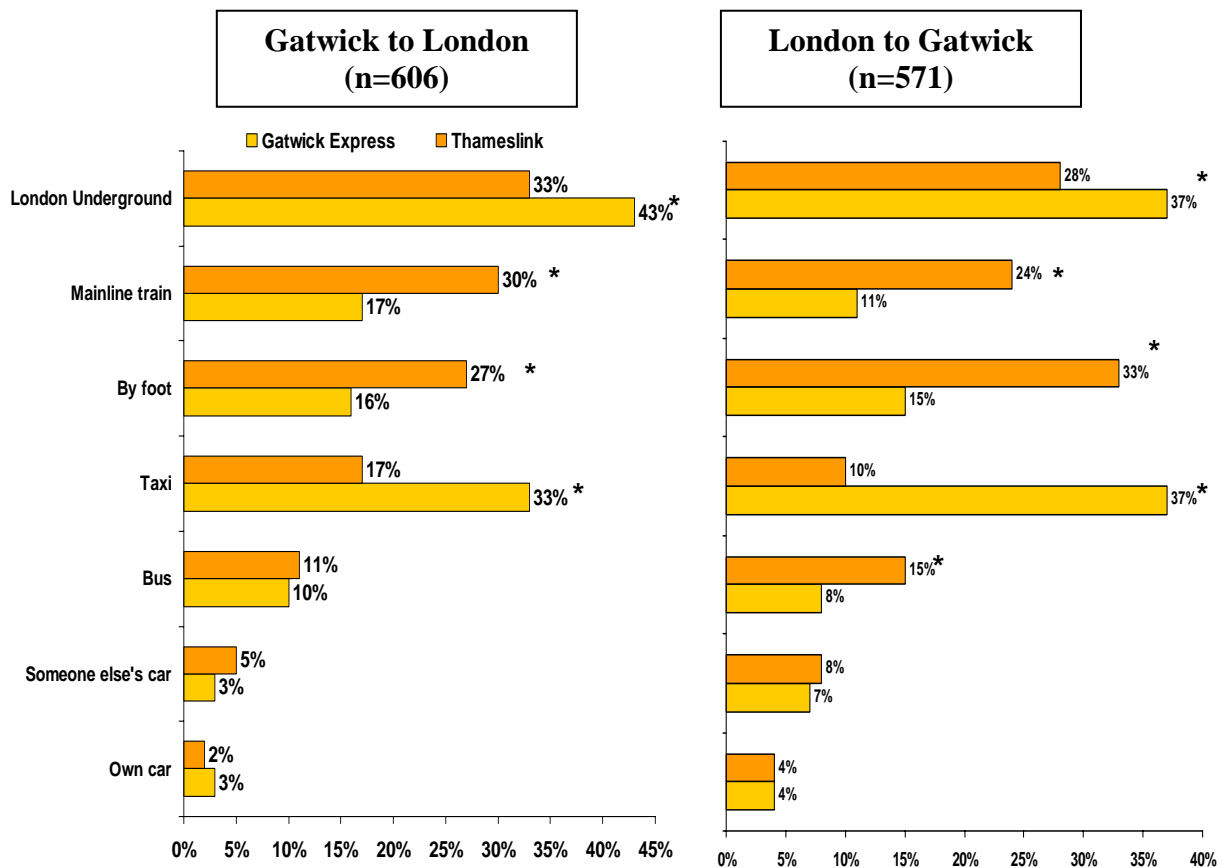
Estimated Total Journey Time	Final Destination (Gatwick to London)		Starting Point (London to Gatwick)	
	Gatwick Express (n=420)	Thameslink (n=186)	Gatwick Express (n=406)	Thameslink (n=165)
Less than an hour	47%	39%	39%	38%
1 -2 hours	44%	52%	52%	49%
2.01 – 4 hours	4%	4%	5%	8%
4.01 – 6 hours	1%	3%	1%	2%
More than 6 hours	2%	1%	1%	1%

Modes of transport used

The most commonly used additional mode of transport to reach the final destination was London Underground. 40% of all those travelling from Gatwick to London said they would use this mode and 35% of all those travelling from London to Gatwick also said this.

Those travelling on the Gatwick Express were significantly more likely to use the London Underground or taxis than those travelling on the Thameslink service, whereas Thameslink passengers were more likely to travel on main line rail services or travel by foot.

Figure 8: Additional modes of transport used



Multicode responses given

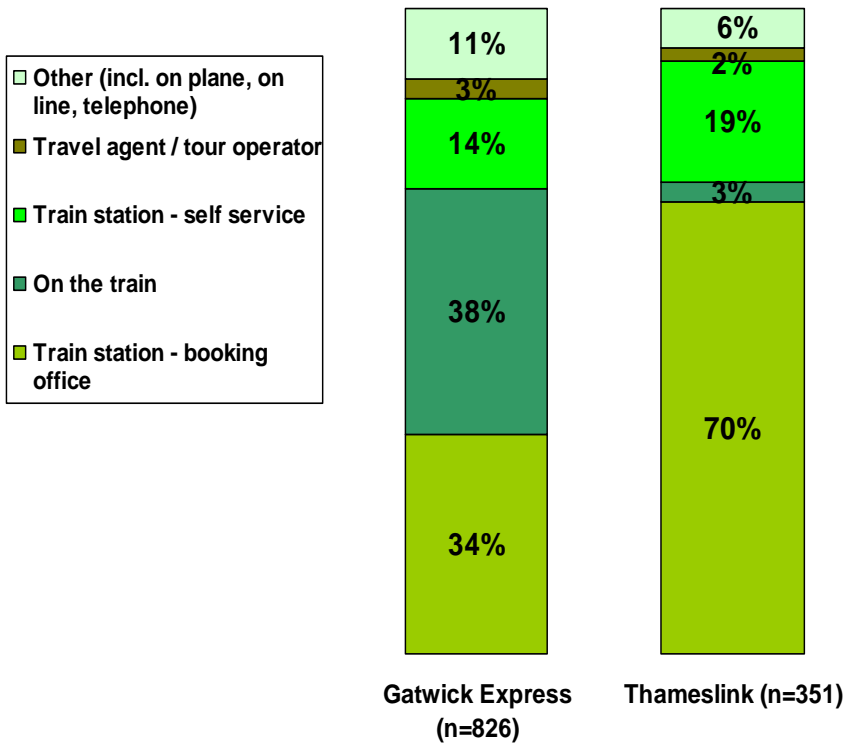
*= Significant differences between Gatwick Express and Thameslink passengers

5 Rail Ticket Type and Cost

Where rail ticket purchased

Around a third (34%) of Gatwick Express passengers purchased their rail ticket at the train station booking office and nearly four in ten (38%) purchased their ticket when on board the Gatwick Express train. This compares to 70% of Thameslink passengers who purchased their rail ticket from the train station booking office and just 3% who purchased their rail ticket while onboard the Thameslink train.

Figure 9: Where rail ticket purchased

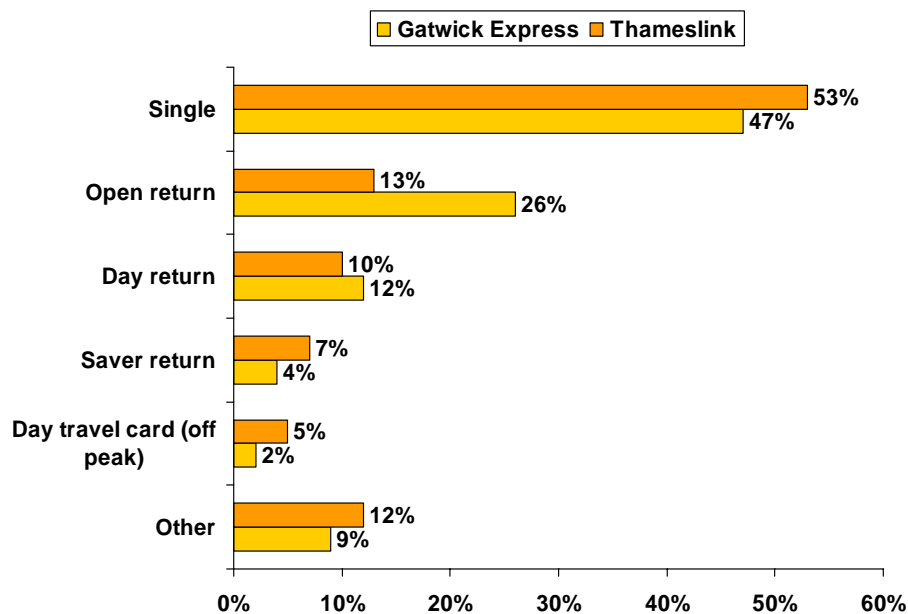


Type of rail ticket purchased

Around half of all respondents had purchased a single ticket for the journey they were making that day. A quarter (26%) of Gatwick Express passengers had purchased an open return ticket compared to 13% of Thameslink passengers.

The majority of all respondents travelled Standard Class. 86% of Gatwick Express passengers travelled Standard Class (14% in First Class) and 97% of Thameslink passengers (3% in First Class).

Figure 10: Type of ticket purchased



Bases: Gatwick Express = 826; Thameslink = 351

Total cost of all rail tickets purchased in the party

Passengers were asked to record the total cost of their rail tickets, including tickets for all members travelling in their party, on the Gatwick Express or Thameslink service. Thameslink passengers paid less in total for their tickets than Gatwick Express passengers. Thameslink passengers were significantly more likely than Gatwick Express passengers to have paid a total of £10 to £20 for all the rail tickets they purchased. Over half (55%) of Thameslink travellers paid a total of £10-20 compared to over a third (37%) of Gatwick Express travellers.

Gatwick Express passengers were significantly more likely than Thameslink passengers to have paid a total of £21-40 for their rail tickets with 37% paying this compared to 15% of Thameslink passengers. This may be explained by the higher proportion of Gatwick Express passengers having bought open return tickets.

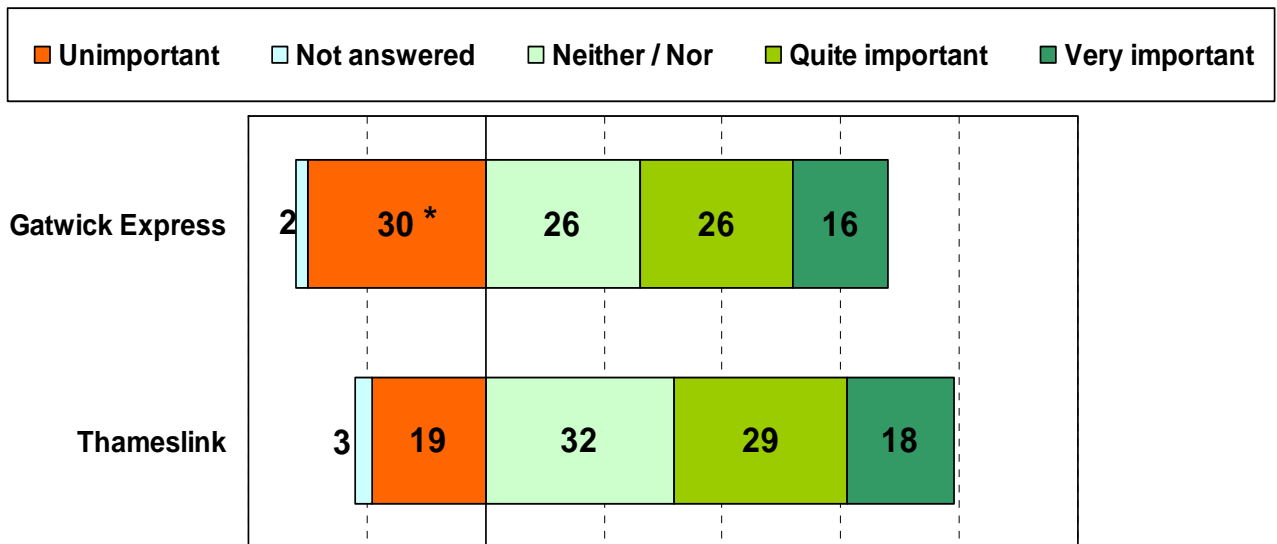
The majority of respondents did not receive any discounts for their tickets, with 85% of Gatwick Express and 79% of Thameslink travellers saying that they had not received any discounts for their rail ticket that day.

Table 5: Total cost of all rail tickets purchased in the party

Cost of ticket	Gatwick Express (n=826)	Thameslink (n=351)
Less than £10	11%	16%
£10 - 20	37%	55%
£21 - 40	37%	15%
£41 - 60	8%	4%
£61 - 80	2%	1%
£81 - 100	1%	1%
Over £100	3%	8%
Don't know	1%	-

Under half of all respondents (44%) considered the cost of their rail ticket to be important when making the decision to travel to Gatwick Airport. Gatwick Express passengers were significantly more likely to say that the cost of the rail ticket was unimportant, at 30% compared to 19% of Thameslink passengers.

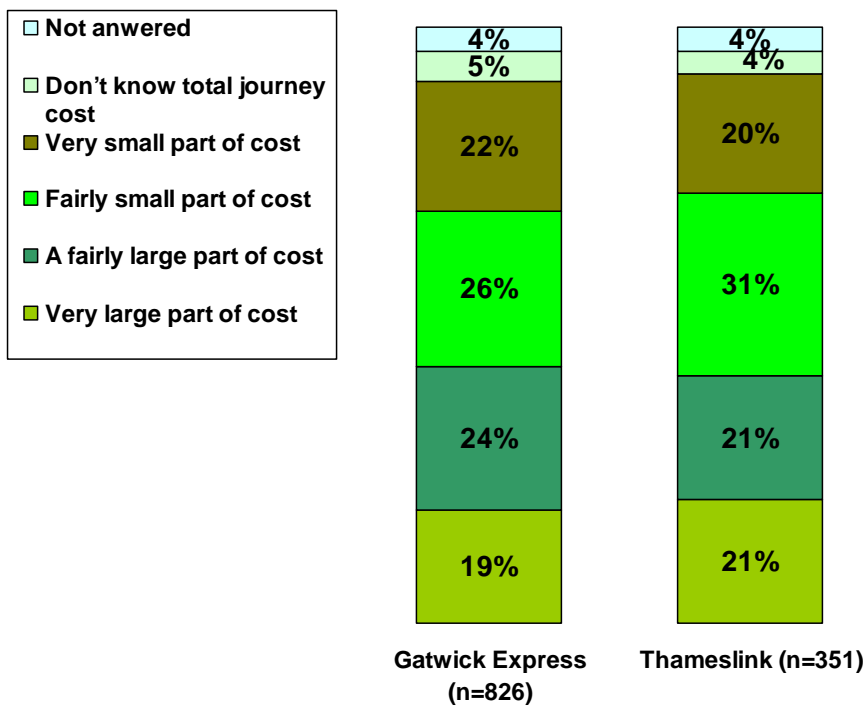
Figure 11: Importance of cost of rail ticket in decision to use Gatwick Airport



Base: All who flew in or out of Gatwick: Gatwick Express =572; Thameslink =250
 *= Significant differences between Gatwick Express and Thameslink passengers

On balance, a higher proportion of respondents considered that the rail fare purchased represented a fairly small or very small part of the total cost of their travel costs that day rather than a fairly large or very large part of the total cost. Passengers' views on both the Gatwick Express and the Thameslink services were fairly similar for this element (Gatwick Express 48% v's 43% and Thameslink 51% v's 42%).

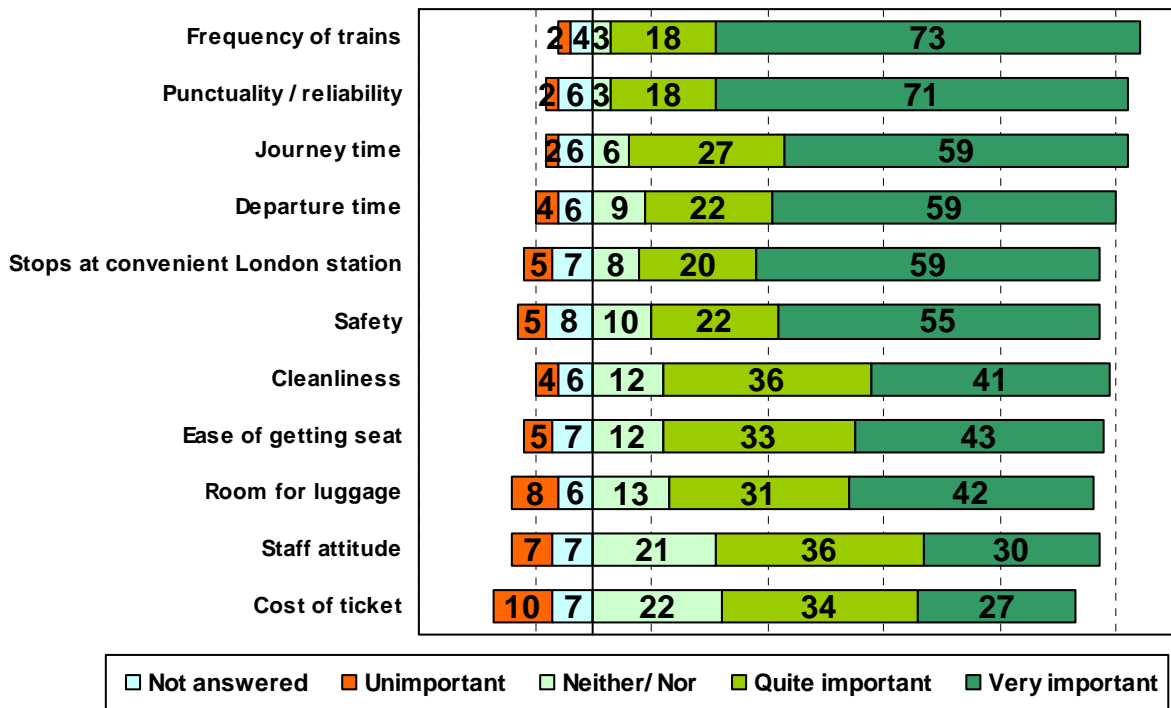
Figure 12: Cost of rail ticket purchased compared to total cost of the journey



6 Reasons for Trains Service Chosen

Frequency of trains, punctuality and reliability, journey time and train departure time were all rated as important factors when choosing a train service between London and Gatwick Airport (see Figure 13). The cost of the ticket was rated as the least important reason for train service chosen, this was in line with the limited level of importance given by respondents for the cost of the rail ticket and how much the ticket represented part of the journey as a whole, in Section 5.

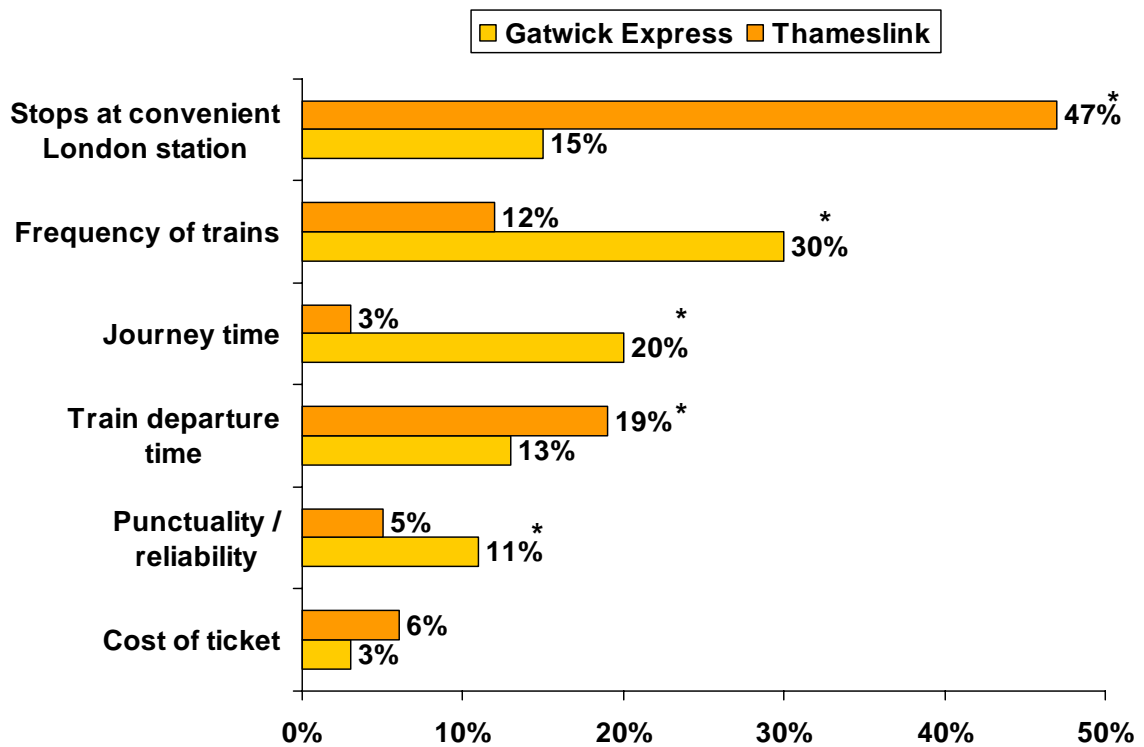
Figure 13: Factors of Importance in choice of train service between London and Gatwick



All respondents (n=1177)

Respondents were also asked what was the most important reason for travelling on the train service chosen that day. The main reason given by respondents using the Thameslink service was that the service stopped at a convenient London station, with 47% giving this as the main reason compared to 15% for Gatwick Express travellers. Frequency of trains was the most important reason given for Gatwick Express travellers with 30% stating this as the main reason (See Figure 14), compared to just 12% for Thameslink passengers.

Figure 14: Most important reason for travelling on this service today



Gatwick Express = 826; Thameslink = 351

*= Significant differences between Gatwick Express and Thameslink passengers

7 Awareness of Alternative Modes of Transport

Awareness of alternative modes of transport

The level of awareness of the Gatwick Express service was higher than for all other services. 43% of Gatwick Express travellers were aware of the Thameslink service and 33% said they were not aware. 78% of Thameslink travellers were aware of the Gatwick Express service and 13% said they were not aware. Of the Southern rail train services, the Kensington to Gatwick service was the least well known overall.

Thameslink passengers were significantly more likely to be aware of the alternative Southern rail services and the National Express coach service than Gatwick Express passengers. This is indicated in the below table with stars highlighting where the data was significantly different between Thameslink and Gatwick Express passengers.

Table 6: Awareness of alternative modes of transport between London and Gatwick

	Southern Rail (Kensington – Gatwick)		Southern Rail (London Bridge – Gatwick)		Southern Rail (Victoria – Gatwick)		National Express coach service	
	Gatwick Express	Thameslink	Gatwick Express	Thameslink	Gatwick Express	Thameslink	Gatwick Express	Thameslink
Aware of service	23%	24%	33%	42%*	47%	62%*	47%	57%*
Not aware of service	63%	64%	53%*	46%	39%*	27%	40%	35%

Bases: Gatwick Express = 826; Thameslink = 351

*= Significant differences between Gatwick Express and Thameslink passengers

Awareness of different fares for different train operators

Although half of Thameslink passengers (50%) and nearly half of Gatwick Express passengers (46%) said they were aware that different train operators charged different fares between London and Gatwick. While just 17% of Thameslink passengers said they actually compared fares before they purchased their rail ticket compared to 11% of Gatwick Express passengers. 52% of Gatwick Express customers and 48% of Thameslink customers said they were not aware that charges varied between operators.

Of those who were aware that train operators charged different fares between London and Gatwick, Gatwick Express was perceived to be the most expensive service with 75% of all respondents giving this answer. Thameslink passengers were significantly more likely to say that they thought the Gatwick Express service was the most expensive service than Gatwick Express users at 80% and 72% respectively, see Table 7 below.

Table 7: Perceived cost of different train operators

Most expensive service	Overall (n=552)	Gatwick Express (n=378)	Thameslink (n=174)
Gatwick Express	75%	72%	80%*
Thameslink	1%	1%	2%
Southern rail (Victoria – Gatwick)	2%	2%	2%
Don't know	14%	16%	10%
No answer given	7%	8%	5%

NB: Southern rail (Kensington to Gatwick) scored 0% overall; Southern rail (London Bridge to Gatwick) scored 1% overall and National Express coach service scored 0%

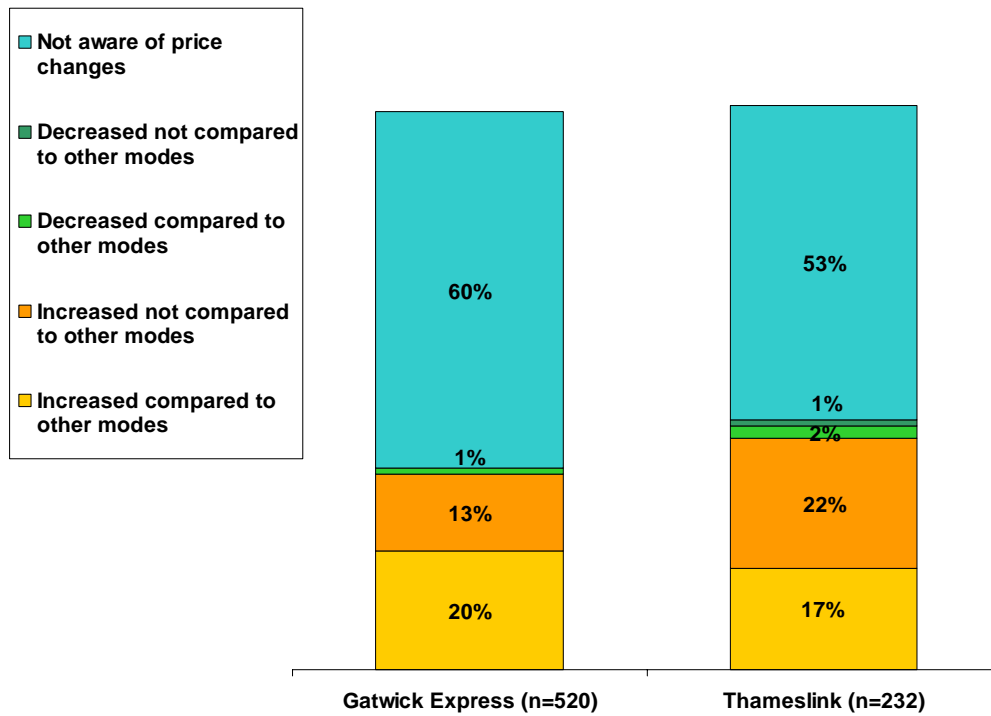
*= Significant differences between Gatwick Express and Thameslink passengers

Awareness of price changes in the last 12 months

Awareness of price changes to rail tickets within the last 12 months was low, for both Thameslink and Gatwick Express passengers. 60% of Gatwick Express and 53% of Thameslink customers said they were unaware of any price changes to rail tickets on that service compared to other forms of transport that could be used for the journey. This is perhaps unsurprising due to the small proportion of respondents who compared prices of rail tickets for different services before purchasing their rail ticket.

Around a third of respondents said prices had increased in the last 12 months. One in five (20%) Gatwick Express respondents said the price had increased compared to alternative modes of transport and nearly one in five (17%) Thameslink respondents also said this.

Figure 15: Awareness of price changes of tickets in the last 12 months



Base: All respondents except those for whom this is the first time they have travelled between Gatwick and London. Only includes all who answered question

8 Switching and Alternative Options

Ease of switching to different modes of travel

A third of Thameslink passengers (34%) said it would be difficult for them to switch to the Gatwick Express service. This is compared to 21% of Gatwick Express passengers who said it would be difficult for them to switch to the Thameslink service.

Thameslink passengers were significantly more likely than Gatwick Express travellers to say that it would be difficult to switch to any of the Southern rail services. However, Thameslink passengers were also significantly more likely to say that they would find it easier than Gatwick Express passengers to switch to the Southern rail service from London Bridge. Gatwick Express passengers were significantly more likely to say that they would find it easy to switch to the Southern rail service from Victoria to Gatwick service.

Table 8: Ease of switching to alternative mode of travel

	Thameslink switching to Gatwick Express	Gatwick Express switching to Thameslink	Southern Rail (Victoria – Gatwick)		Southern Rail (Kensington – Gatwick)		Southern Rail (London Bridge – Gatwick)	
			GE	TL	GE	TL	GE	TL
Easy	25%	19%	34%*	22%	8%	5%	14%	21%*
Difficult	34%	21%	9%	32%*	30%	53%*	26%	34%*
Neither / Nor	15%	12%	10%	16%	10%	5%	10%	10%

Base: Gatwick Express = 826; Thameslink = 351

*= Significant differences between Gatwick Express and Thameslink passengers

Respondents were also asked the likely ease or difficulty of switching to non rail alternative modes of transport for the journey and all alternative modes were rated as more difficult to switch to than the rail options. Just 16% of respondents overall said it would be easy to switch to taxi and 14% said it would be easy to switch to being a passenger in a private car. 12% said it would be easy to switch to the National Express Coach service and 11% said they would change destination if they had to switch method of transport.

Likely switching behaviour if current service no longer available

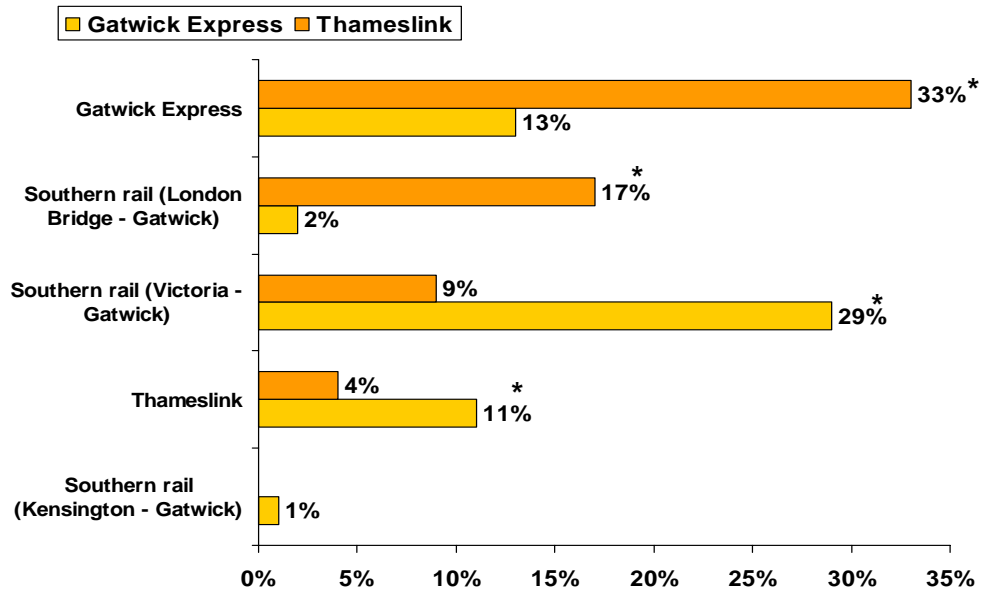
Respondents were also asked what they would be likely to do if the current rail service they had used that day was no longer available. Figure 16 indicates that a third of Thameslink passengers would switch to the Gatwick Express service. Thameslink passengers were also significantly more likely than Gatwick Express passengers to change to the Southern rail service from London Bridge.

29% of Gatwick Express passengers said they were most likely to switch to the Southern rail service between Victoria and Gatwick airport (a significant difference compared to Thameslink passengers). 11% of Gatwick Express customers said they were most likely to switch to the Thameslink service.

Potential use of alternative modes of transport other than train for this journey was again limited, as 70% of Thameslink passengers said they were likely to take a train route for this journey and 62% of Gatwick Express passengers likely to do the same.

Please note that to some respondents the phrasing of this question may have suggested that the question just related to the specific journey time they were travelling on that day and therefore that they could still use that particular train service. This was probably the case for 13% of Gatwick Express passengers who said they would still use the Gatwick Express and 4% of Thameslink passengers who said they would still use the Thameslink service. Therefore Figure 16b on the following page excludes these respondents and shows that over a third (34%) of Gatwick Express travellers said that they would switch to the Southern rail service from Victoria and over a third (34%) of Thameslink travellers said that they would switch to the Gatwick Express service.

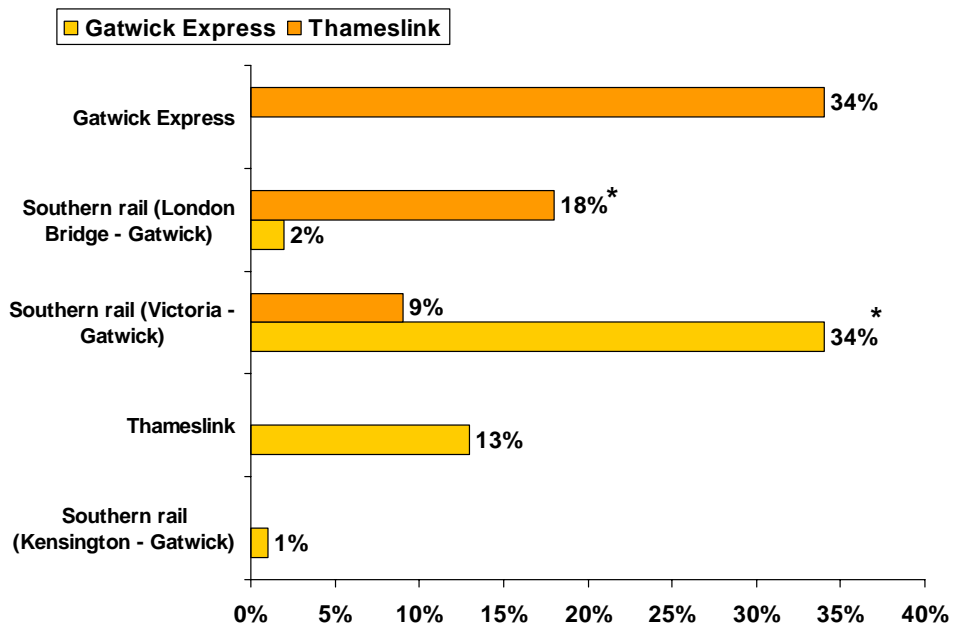
Figure 16a: Likely mode if current service unavailable (all respondents)



Base: Gatwick Express = 826; Thameslink = 351

*= Significant differences between Gatwick Express and Thameslink passengers

Figure 16b: Likely mode if current service unavailable (Excluding those who answered their existing service)



Base: Gatwick Express = 718; Thameslink = 337

*= Significant differences between Gatwick Express and Thameslink passengers

Journey direction (i.e. Gatwick to London or London or Gatwick) did not make any significant differences for the alternative method chosen for Gatwick Express or Thameslink passengers.

Gatwick Express passengers who said they would be most likely to use the Southern rail service between Victoria and Gatwick as an alternative service were significantly more likely to be commuters. Business travellers on the Gatwick Express were significantly more likely to have said they would travel by taxi as an alternative or would use a different airport than those travelling for other reasons.

Gatwick Express travellers who travel between London and Gatwick every 6 months or more frequently were significantly more likely to say that they would switch to the Southern rail service from Victoria to Gatwick as did those who reside in Great Britain or Ireland. Those who travel once a year were more likely to say that they would use the Thameslink service. Those who travel once a month or less were also significantly more likely to travel by taxi as were those who lived outside of Europe.

Thameslink passengers travelling between London and Gatwick every 6 months or more frequently were more likely to say that they would switch to the Southern rail service between London Bridge and Gatwick or Victoria and Gatwick and were most likely to be residents in Great Britain or Ireland. Less frequent Thameslink travellers (i.e. traveling between London and Gatwick less than once a year or those making the journey for the first time) were more likely to say that they would switch to the Gatwick Express.

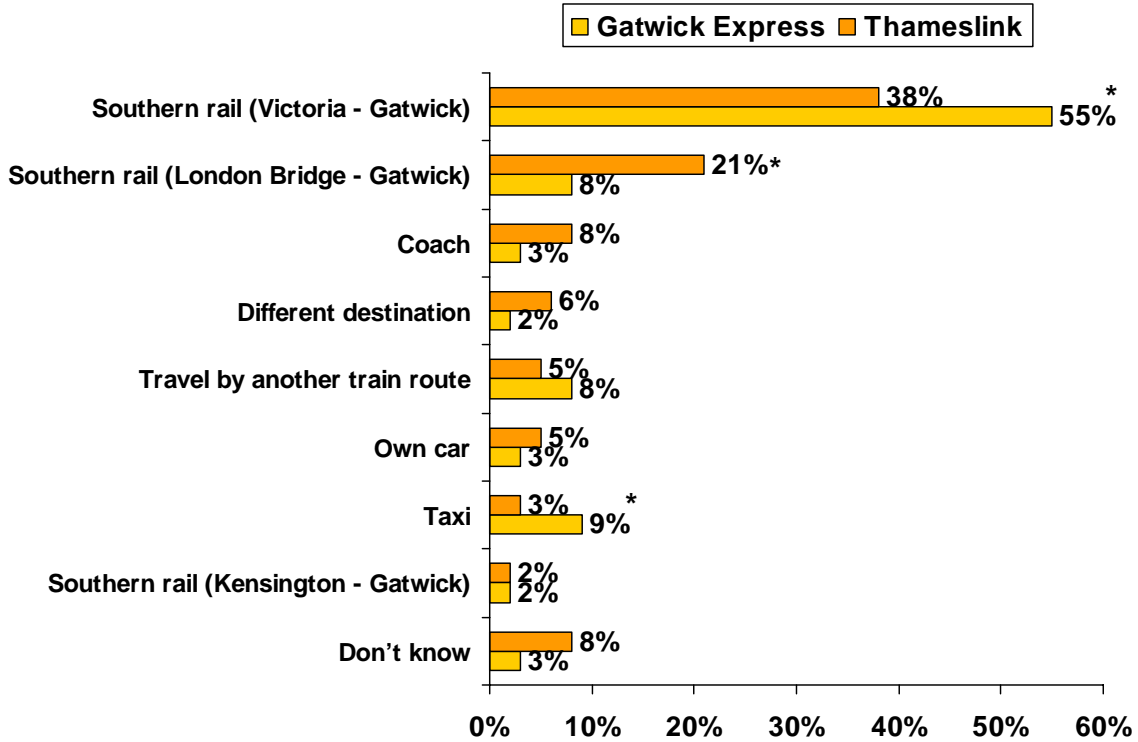
Likely switching behaviour if Gatwick Express and Thameslink services were unavailable

Respondents who were most likely to switch to the Gatwick Express or the Thameslink service were also asked what they would do if neither the Gatwick Express nor Thameslink services were available.

55% of Gatwick Express passengers said they would be most likely to use the Southern rail service between Victoria and Gatwick, significantly higher than the 38% of Thameslink travellers who also said this. 21% of Thameslink travellers were more likely to state that they would travel on the Southern rail service from London Bridge to Gatwick compared to 8% of Gatwick Express passengers (another significant difference), again suggesting that origin and destination are important factors in choice of service that would be used.

Other than considering switching to the Southern rail services from Victoria and London Bridge, likely use of alternative modes of transport or the Southern rail service from Kensington to Gatwick was limited.

Figure 17: Most likely alternative if Gatwick Express or Thameslink services were not available



Base: All respondents who say that they would be most likely to use Gatwick Express =199 or Thameslink=130 as alternative services

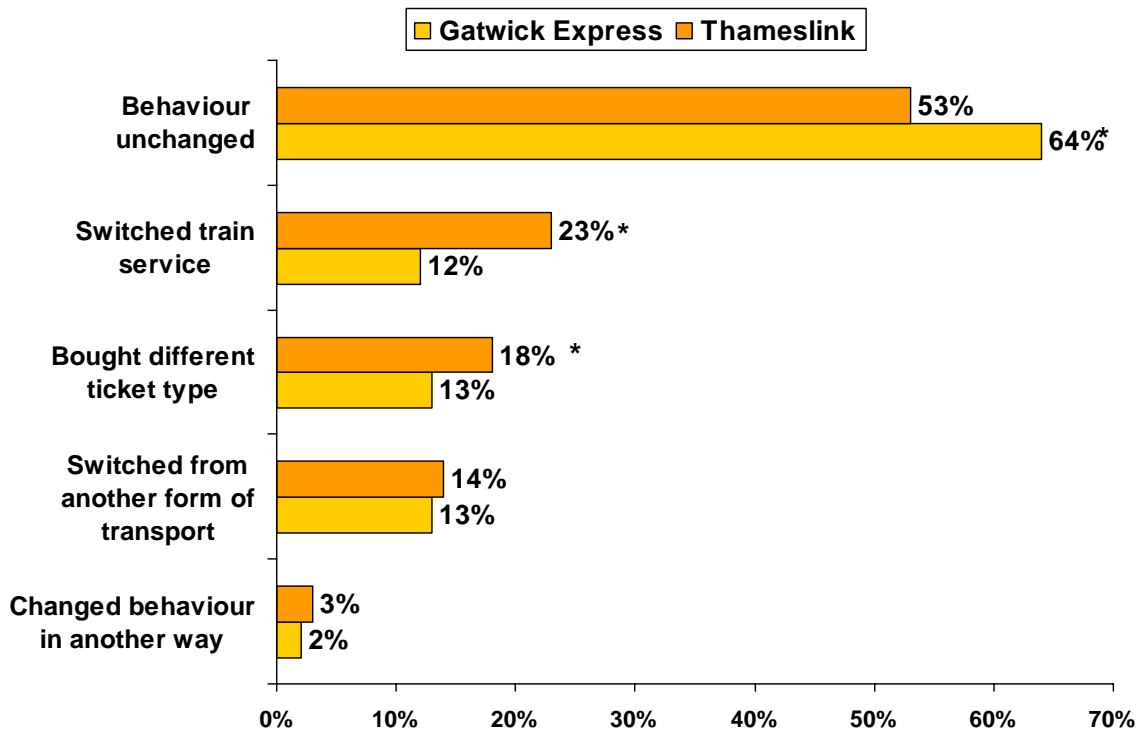
*= Significant differences between Gatwick Express and Thameslink passengers

9 Change in Travel Behaviour in Last 12 Months

Over half of all respondents claimed not to have changed the way they travelled between London and Gatwick Airport in the last 12 months. 53% of Thameslink passengers and 64% of Gatwick Express passengers said they had not changed the way they had travelled in the last 12 months.

For respondents who said they had switched train service, overall 7% said they had switched from the Gatwick Express service to another service, 6% had switched from the Southern rail service between Victoria and Gatwick and 3% had switched from the Thameslink service.

Figure 18: Ways travel had changed in last 12 months



Base: All respondents except first time travellers between Gatwick and London. Gatwick Express =527; Thameslink =234. Only includes all who answered question) Multicode responses

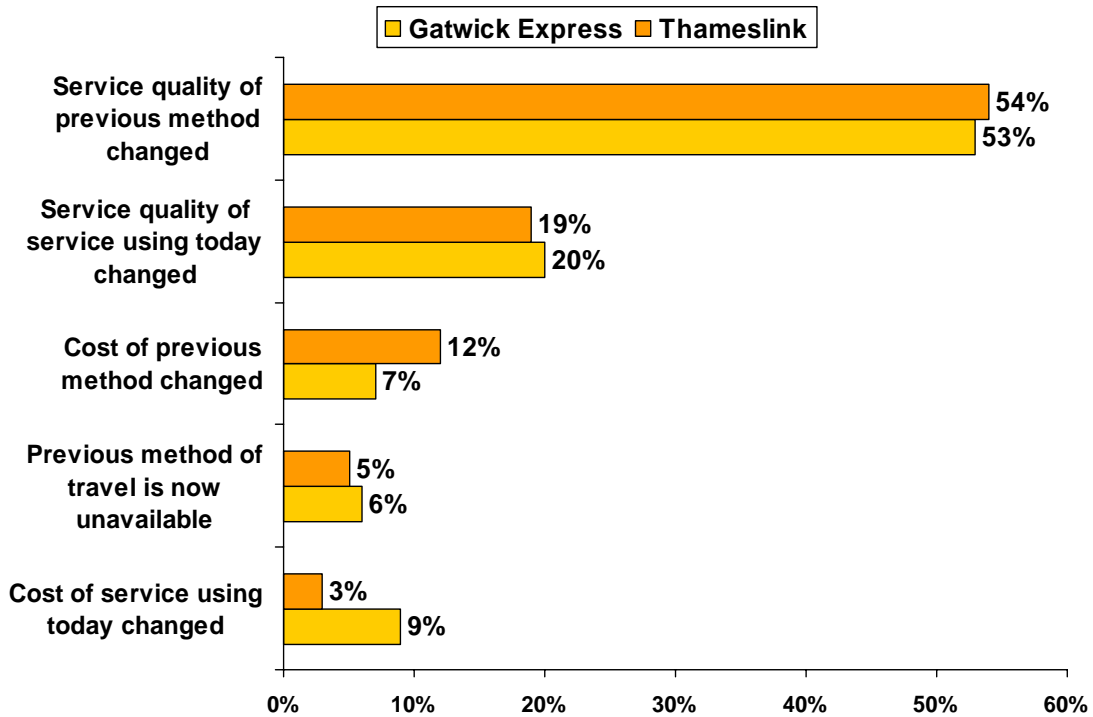
*= Significant differences between Gatwick Express and Thameslink passengers

Over half of all respondents said the main reason that they had changed the way they travelled within the last 12 months was because the quality of the service of their **previous method** had changed (54% of Thameslink passengers and 53% of Gatwick Express passengers).

A fifth of all respondents who had changed the way they travelled said this was due changes in the quality of the service they were **using that day** (20% for Gatwick Express and 14% for Thameslink passengers).

Following the earlier findings that indicated that cost has a limited impact on choice of service, only a small proportion of respondents said they had changed their behaviour as a result of a change of cost, to either their previous method or for the service they were using that day.

Figure 19: Reasons for changes in travel behaviour



Base: All respondents who have changed their travel behaviour in last 12 months. Gatwick Express =112; Thameslink =73. Only includes all who answered question

10 Likely Behaviour if Price Changed

Likely change in behaviour if rail fare that day increased by 5%

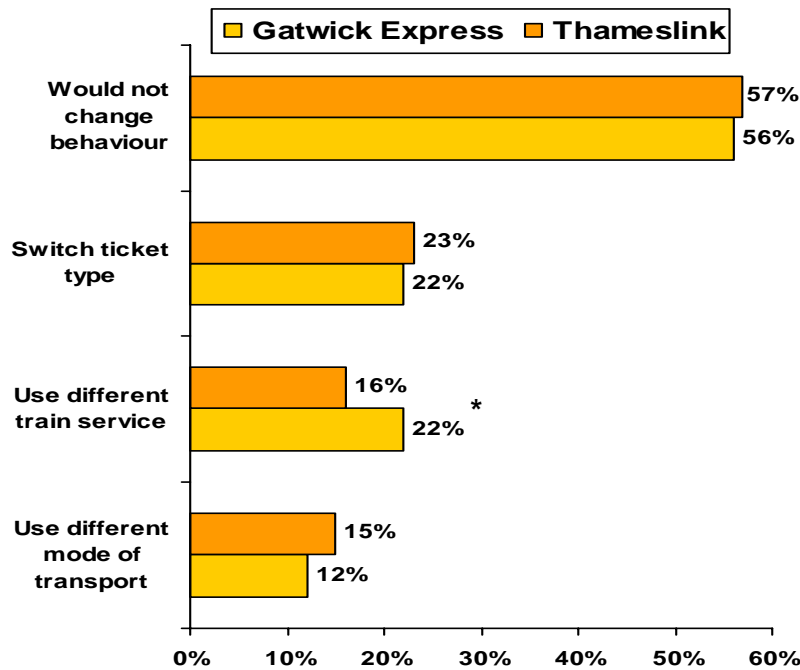
57% of Thameslink passengers and 56% of Gatwick Express passengers said they would not permanently change their travel behaviour if the rail fares paid that day increased by 5%.

Around a quarter of respondents said they would switch ticket type to either a more flexible ticket or one that was cheaper but had more restrictions (23% for Gatwick Express and 22% for Thameslink passengers). A significantly higher proportion of Gatwick Express passengers (22%) said they would use a different train service, compared to 16% of Thameslink passengers.

A significantly higher proportion of Gatwick Express passengers (11%) compared to 5% of Thameslink passengers said they would use the Southern rail service between Victoria and Gatwick. 7% of Thameslink passengers said they would switch to the Gatwick Express service and 4% of Gatwick Express passengers said they would switch to the Thameslink service. There is also a significant difference between those who said that they would switch to the Southern rail service between London Bridge and Gatwick, as 6% of Thameslink travellers said they would switch compared to 2% of Gatwick Express travellers.

While a number of passengers said they would switch train service following a 5% increase in cost of the rail ticket, in practice few have changed travel behaviour within the last 12 months.

Figure 20: Permanent change to behaviour if rail ticket increased in price by 5%



Multicode responses. Only includes all who answered question) Gatwick Express = 739; Thameslink = 371

*= Significant differences between Gatwick Express and Thameslink passengers

Gatwick Express passengers travelling for leisure or other reasons were significantly more likely to say that they would purchase cheaper rail tickets with more restrictions than business travellers or commuters. Opting to purchase a cheaper ticket was also significantly more likely for those who travel on this route less than once a year or for those who had made the journey for the first time that day.

Gatwick Express commuters were significantly more likely to say that they would use the Southern rail service between Victoria and Gatwick than other traveller types. Those travelling the route every 6 months to once a year were significantly more likely to say that they would drive in their own car.

There were no significant differences by purpose of journey for Thameslink passengers. Those who travel less than once a year were significantly more likely to say that they would purchase a more expensive but more flexible ticket. Those who travelled much more frequently i.e. once a week or more were significantly more likely to say that they would use the Southern rail service between London Bridge and Gatwick.

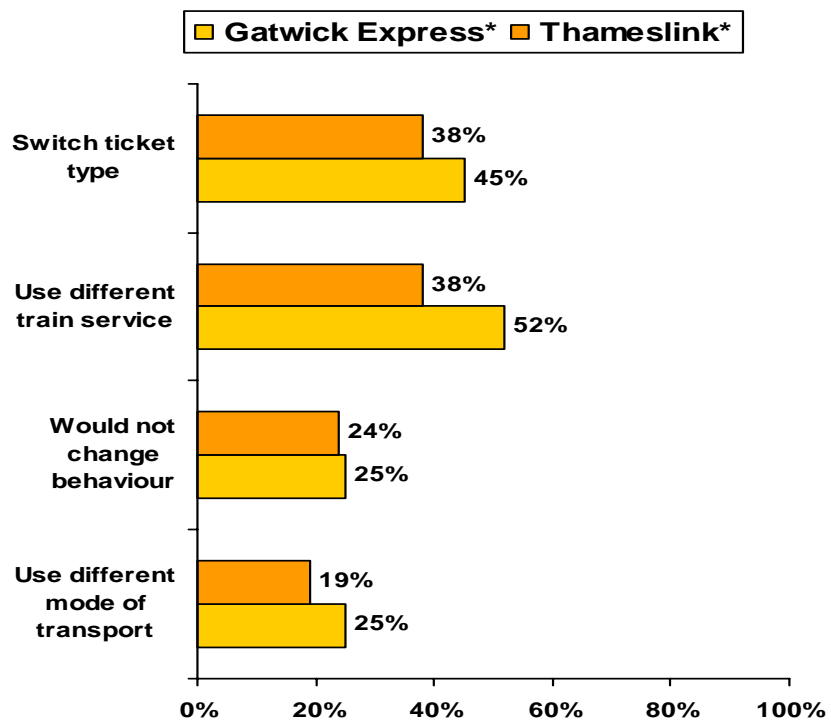
There were no significant differences by country of residence for either Gatwick Express or Thameslink passengers.

Likely change in behaviour if both Gatwick Express and Thameslink fares increased by 5%

Respondents who said they would take the Gatwick Express or Thameslink service if the cost of the rail tickets increased, were asked whether they would permanently change their travel behaviour if both the Thameslink and Gatwick Express fares increased by 5%. A quarter of all respondents said they would not change their travel behaviour (24% for Thameslink and 25% of Gatwick Express). 45% of Gatwick Express passengers said they would switch ticket type as did 38% of Thameslink passengers.

52% of Gatwick Express passengers said they would use a different train service, as did a third (38%) of Thameslink service users. Use of different modes of transport other than train was low for both passenger sets.

Figure 21: Permanent change to behaviour if Gatwick Express and Thameslink fares both increased in price by 5%



Base: All respondents who said they would switch to Gatwick Express if rail ticket increased by 5%
 Multicode responses. Only includes all who answered question * Caution: Low base sizes: Gatwick = 44;
 Thameslink=21

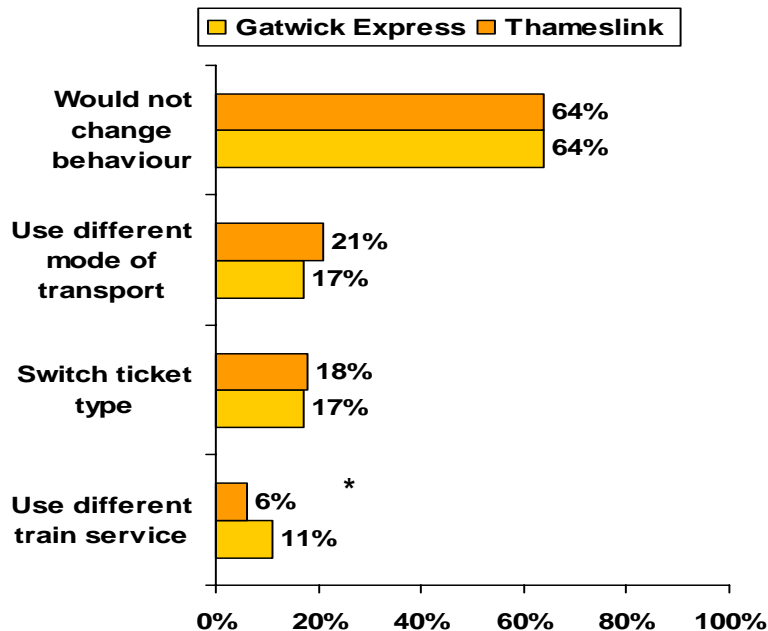
Likely change in behaviour if all rail fares increased by 5%

Almost two thirds (64%) of all respondents said they would not change the way they travel between central London and Gatwick should all rail fares increase by 5%. This was the same for both the Gatwick Express and Thameslink service.

Around one in five respondents said they would switch ticket type to either a more expensive but more flexible ticket or a cheaper ticket with more restrictions.

The proportion of passengers who said they would actually use a different train service as a result of a price increase was low with 11% of Gatwick Express passengers saying that they would switch and 6% of Thameslink passengers saying the same.

Figure 22: Permanent change to behaviour if all rail fares increased in price by 5%



Base: Multicode responses. Only includes all who answered question. Gatwick Express = 717; Thameslink = 319

*= Significant differences between Gatwick Express and Thameslink passeng

11 Summary

70% of all respondents were flying in or out of Gatwick Airport. For around half of these respondents the flight was for leisure.

Around a third of travellers use the Gatwick Express or Thameslink service once a month or more frequently. A quarter of travellers use the train services once every six months.

Destination and origin of journey is a key factor in the choice of train service. Those starting or ending their journey in west London are significantly more likely to be using Gatwick Express from Victoria. Those starting or ending their journey in the City of London or in East London were significantly more likely to be using the Thameslink service.

Under half of all respondents considered the cost of their rail ticket to be important when making the decision to travel from Gatwick Airport. A higher proportion of respondents said the rail fare paid represented a fairly small or very small element of their total journey cost.

For Thameslink passengers, the most important reason given for the choice of train service was that the service stopped at a convenient London station, whereas frequency of the service was the most important reason given by Gatwick Express passengers. Cost of the rail ticket ranked as the least important reason for choice of service.

The Gatwick Express service had the highest level of awareness of all the services. Awareness of the Southern rail services to destinations other than Victoria was particularly low.

Around half of all respondents said they were aware that different train operators charge different fares between central London and Gatwick, although only a small proportion of respondents actually compared fares of different operators that day.

A third of Thameslink passengers (34%) said it would be difficult for them to switch to the Gatwick Express service, compared to 21% of Gatwick Express passengers who said it would be difficult to switch to the Thameslink service.

Thameslink passengers were also significantly more likely than Gatwick Express passengers to say that they would find it difficult to switch to Southern service to Victoria; but easier to switch to Southern service to London Bridge. Gatwick Express passengers were significantly more likely to say that they would find it easy to switch to the Southern service to Victoria.

If the current service used was no longer available Thameslink travellers said they were most likely to use the Gatwick Express service while Gatwick Express customers said they would use the Southern service from Victoria.

Most said they have not changed their travel behaviour in the last 12 months. For the third that had changed the way they travelled this was said to be because the service quality of their previous method had changed.

Likelihood to switch rail provider, ticket type or mode of transport is limited despite potential price increases for both Thameslink and Gatwick Express customers. Convenience of the departure and arrival stations in central London is considered the most important factor to consider.
