

Significant overlap flows to or from central Glasgow and Edinburgh

1. This appendix illustrates the different characteristics of rail and bus services on the main overlap flows to central Glasgow and Edinburgh. For this purpose, it has only analysed those overlap flows to central Glasgow where bus services account for more than 10 per cent of passengers; but those in the Edinburgh area also include services from Livingston North, Bathgate and North Berwick where, on the basis of FirstGroup's analysis of overlaps, bus passengers share is below 10 per cent.
2. Variations in (unweighted) average journey time, fares, frequencies and passenger shares of those overlap flows are summarized in Table 1. (The figures given are averages for flows of the rail distances given:¹ there are significant variations in the characteristics of particular flows in each category.)

TABLE 1 Significant overlap flows to/from central Glasgow/Edinburgh Waverley

	Glasgow				Edinburgh	
	1–3 miles	3.25–5 miles	5.25– 9.25 miles	Over 10 miles	5.25– 9.25 miles	Over 10 miles
Number of significant flows*	12	21	20	16	4	4
Average journey time (mins)						
Bus	15	24	37	60	31	67
Train	7	11	17	32	13	30
Difference	8	13	20	28	18	37
Average peak return (£)						
Bus	1.97	2.26	2.33	2.49	2.12	4.08
Train	1.56	2.48	3.09	4.29	3.55	5.87
Average off-peak return (£)						
Bus	1.95	2.17	2.20	2.20	1.90	3.81
Train	1.20	1.66	2.28	3.16	2.62	3.87
Average frequency (M–F daytime)						
FirstGroup	27	16	13	8	8.5	5.2
Other bus†	7.7	5.4	2.1	0.7	7.0	-
Train	4.5	3.4	3.1	2.6	1.75	1.5
Average bus frequency M–F evening						
FirstGroup	11	6.1	5.2	3.1	3.7	2.2
Other bus†	1.2	0.4	0.3	0.2	2.0	-
Approximate average % passengers	()	
FirstGroup	✕				✕	
Other bus†))	
Train	21	40	51	66	67	93

Source: CC study.

*Where an overlap flow is served by several routes, it is only treated as one flow for the purpose of this table.

†And subway. The share of passengers is based on estimated share of daytime frequencies—but this likely to understate FirstGroup's share given few competitors operate 'out of hours'.

¹The only data available to us was in miles, and not sufficiently precise to convert into kilometres.

3. On most of the shorter-distance overlap flows in inner Glasgow, the frequency of bus services is considerably greater than that of rail services. Most of the flows we considered, for example, had bus frequencies of over ten an hour, in one case (between Bellgrove and Glasgow) of 48 an hour. Train frequencies are generally of two, four or six an hour but Partick and Hyndland have 12 trains an hour. Bus frequencies are generally lower over longer distances, but nonetheless on some corridors still significantly greater than those of train, for example, some 24 buses an hour between Clydebank and Glasgow compared with only four trains an hour. On most routes, train frequencies over longer distances are only some two or four an hour (one exception, however, being Dalmuir with ten services an hour).
4. Other companies operate services on 31 of the 69 Glasgow flows. The frequency of competitors' bus services is in almost all cases much lower than that of FirstGroup's, FirstGroup accounting on average for over 80 per cent of frequencies operated. There are, however, some exceptions to this; for example between Crookston and Glasgow both FirstGroup and its competitors operate about 20 services an hour; between Giffnock and Glasgow, FirstGroup operate 17 buses an hour and its competitors 14; and between Baillieston and Glasgow FirstGroup operates some ten buses an hour and its competitor eight. There are also some examples of this on flows not into Central Glasgow; for example, between Partick and Clydebank, FirstGroup operate 12 services an hour, its competitors 15.
5. Competitors rarely operate out of hours (generally after 7 pm and before 7 am on Monday to Saturdays or on Sundays). Only four other companies of which we are aware operate services between 10 and 11 pm, on only 13 of the 69 Glasgow routes. These include two of the smaller competitors, and Stagecoach and Arriva services to and from destinations outside the Glasgow area, although other Stagecoach services within Glasgow operate up to 8.30 or 9.30 pm. A few more smaller competitors and Stagecoach operate on Sundays.
6. Bus fares are generally more expensive than train fares on journeys of up to three miles. Over longer distances, peak bus fares are in several cases significantly below those of peak train fares (for example, from Alexandria to Glasgow of £2.50 by bus and £5.10 by train), since FirstGroup's bus operations offer a £2.20 off-peak ticket and £2.50 peak ticket which provides travel throughout the day on any bus. The differential in peak fares is somewhat lower if season tickets are purchased, and the differential in off-peak fares is much more limited. As noted above, moreover, free concessionary tickets are available for bus travel, but rail concessions are much more limited.
7. Although, over shorter distances, journey time by bus generally exceeds that by train, the difference in absolute journey time is relatively limited. Over long distances, bus journey time is often 30 or more minutes longer than the train journey time.
8. Possibly as a result of a higher frequency, buses generally account for the majority of passengers over shorter routes, trains for the majority of passengers over longer routes. There are, however, clear exceptions to this: we noted elsewhere that between Clydebank and Glasgow, a distance of some eight miles, FirstGroup's figures showed buses account for a large majority (85%) per cent of passengers.
9. The number of overlaps in the Edinburgh area is significantly less. On average, they involve longer journeys than those in the Strathclyde area. To the east of Edinburgh FirstGroup competes with Lothian on three of the four main overlap flows, in some cases (for example, Musselburgh to Edinburgh) FirstGroup operating a lower frequency than Lothian and also operating out of hours. But there is no competition on the main overlap flows to the west of Edinburgh. Bus frequencies are generally

greater than train frequencies, most of the train services being operated only every hour or half hour.

10. In the Edinburgh area, there is no maximum bus return fare or equivalent of the Glasgow £2.20/£2.50 day tickets for use on any bus: nonetheless peak bus fares are significantly below peak rail fares (for example, from North Berwick to Edinburgh, the bus return peak fare of £4.75 compares with £7 for the train) but closer to rail fares off-peak. Bus journey times are, almost without exception, significantly above rail journey times. Over longer distances, the majority of passengers use train rather than bus; but this may to some extent reflect the relatively small overlap areas assumed.