

Rail User Profile 2013

October 2013

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SYNOPSIS

Socio-economic profile:

Journey purpose:

- 57% of weekday travellers were commuters with an additional 20% travelling for education. 14% were leisure users while 10% were shoppers.
- On a Saturday 42% travelled for leisure, 36% shopping and 20% for work purposes.
- There was an increase in weekday commuters and in Saturday leisure users.
- In contrast there had been a decrease in the proportion of shoppers on weekdays and Saturdays.

Age:

- There was little significant change in the age profile of users who continue to be more youthful than the conurbation.
- 30% were aged 16-24, 55% were in the economically active age group between 25-59 years, while just 14% were aged over 60.
- Scholars (89%, 16-24) and commuters (48%, 16-34) were most youthful.
- Older respondents were more likely to travel for shopping (32%, 65+) and leisure (29%, 65+).

Gender:

- There was little change in the gender split of rail users with a slight bias towards females (57% female; 43% male).
- Females made up the majority group regardless of journey purposes, accounting for 72% of shoppers, 54% of commuters and 55% of scholars.

Socio-economic group:

- Rail users continue to be more affluent than the conurbation with 71% from the affluent AB/C1 social group.
- 60% worked full time a further 13% part time, there was an increase in the proportion working full time, and a decrease in part time.

Ethnicity:

- 78% of rail users were White, with 21% from BME backgrounds (15% were Asian and 4% were Black). There was an increase in BME usage.
- Scholars were the most ethnically diverse group with 54% emanating from White backgrounds, 33% from Asian backgrounds and 7% from Black backgrounds.

Car ownership and availability:

- Rail users have a high level of car ownership (78%), with figures similar to 2008.

- Commuters were most likely to live in a household with a car (82%), as did 80% of scholars.
- There was an increase in rail users stating they 'always' had a car available (47%).
- Car availability was highest among commuters (53%) and lowest among scholars (24%).

Travel Patterns

Frequency of travel:

- Rail users remained frequent travellers. 41% travelled daily by rail; 23% 2-4 days per week and 12% weekly.
- Daily use was highest amongst commuters (66%) and scholars (52%).
- 43% of rail users travelled at least one Saturday a month, a dip on the 49% recorded in 2008.
- 17% travelled by rail at least one Sunday a month, an increase on the 14% recorded in 2008.

Travel times:

- Overall there was a decline in peak travel (36%) and an increase in travel during both peak and off peak hours (34%).
- Commuters (59%) and scholars (42%) were most likely to travel in the peak, however peak travel dipped amongst both groups with an increase in peak/off peak use.
- 65% of shoppers and 57% of leisure users travelled in the off peak.

Ticket type:

- There was an increase in season ticket use (39%), however the majority (50%) still used a cash fare. 11% held a concessionary pass.
- Commuters saw little change in ticket type. 56% used a rail pass with 42% of these using an ntrain ticket. A further 41% used a cash fare.
- There was a significant increase in the proportion of scholars using season tickets (60%, 2013) with the nNetwork Student (40%) being most popular. 40% used a cash fare.
- Tickets for other weekday uses were split between cash (60%) and Concessionary Passes (31%).

Ticket Purchase:

- There was a significant decline in the proportion that purchased their ticket at the station booking office (60%), however this remained the most common outlet to purchase tickets.
- Use of Automatic ticket machines (11%) and direct debit (9%) increased most significantly.
- Increasing proportions of commuters used automatic ticket machines (9%), direct debit (16%), while 10% a work scheme/travel scheme.
- 9% of scholar purchased tickets through schools/college.

Usual wait time at station:

- On average respondents waited 6 minutes and 48 seconds for a train, showing little significant change.
- Commuters (6 minutes and 22 seconds) and scholars (6 minutes and 42 seconds) had the shortest wait time.
- Shoppers (7 minutes 18 seconds) and leisure users (7 minutes 18 seconds) had the longest wait times.

Mode of travel to/from station:

- 46% walked to the station, 22% drove, 14% travelled as a car passenger and 11% travelled by bus.
- There was an increase in travel as a car passenger with a decrease in the proportion travelling on foot or by bus.
- Walking was the most common mode amongst all respondents peaking at 52% amongst scholars dipping to 44% amongst leisure users.
- Commuters were most likely to drive (27%); with a slight increase in travel as a car passenger (12%).
- Scholars saw a significant increase in travel as a car passenger (17%) with a decline in car driving (9%) and in bus use (12%).
- Leisure users also saw a decline in walking (44%) and bus trips (10%) and an increase in travel as a car passenger (16%).

Car bourn travel to stations:

- Overall there was a decline in the proportion of car users parking on the station car park (50%) and in the proportion parking on street (15%).
- Perhaps as a result of the increase in car passengers more car users were dropped off at the rail station (32%)
- The proportion of commuters parking on the station car park (54%) remained the same, fewer parked on street (15%) with more being dropped off (28%).
- Considerably more scholars were being dropped off (60%) with a decline in parking on the station car park and on street.

Use of Cycle parking:

- 32% of cyclists left their bike at the station; 68% took them on the train.

Travel time to boarding station:

- The average travel time to the station was 11 minutes and 08 seconds, marginally lower than the 11 minutes 44 recorded in 2008.
- Commuters and shoppers had the shortest journeys time to station.
- Scholars and leisure users had slightly longer journey times
- Those who had travelled to the station either by train (22 mins:42 secs) or bus (16 mins:10 secs) had the longest travel time.
- Car drivers had an average journey time of 10 mins: 17 secs.
- Walkers (9 min:35 secs) and car passengers (9 min: 28 secs) had the shortest journey.

Final alighting station:

- 68% of travel was into Birmingham City centre (46%, New Street; 11% Snow Hill; 11% Moor Street).

Reasons for travel by train:

- The main reason given for rail travel was that *the train was quicker* (40%), this was the main reason amongst all groups of respondents.
- 20% used the train as they *did not have a car/don't drive* while 10% stated that they *don't have to worry about/pay costs of parking*, a further 6% used the train as they *don't like driving/don't have to worry about driving*.
- Scholars were more likely to say they use the train as they *have no car/don't drive* (31%). This also accounted for 23% of leisure users.
- Commuters and shoppers (12%) were more likely to travel by train as they *don't have to worry about/pay costs of parking*.

Source of train information:

- There was an increase in the proportion that would use the Internet to obtain rail information (53%), a further 12% would use a mobile App.
- There was a dip in those who would ask at the station (16%), telephone (12%) or use timetables at the station (11%).
- Commuters and scholars were the biggest users of the Internet and mobile Apps
- Shoppers were least reliant on the internet and most reliant on asking at station.

Use of Digital Media

- 71% of rail users had a smartphone, this rose to 90% amongst scholars and to 80% amongst commuters dipping to 50% amongst leisure users.
- 56% of rail users used Facebook, this rose to 76% amongst scholars and to 60% amongst commuters.
- 29% of rail users used Twitter, this rose to 46% amongst scholars and to 31% amongst commuters.

1.0 INTRODUCTION

1.1 BACKGROUND TO RESEARCH

1.1.1 Centro has regularly conducted Rail User Profile surveys to monitor the profile and travel habits of local rail passengers. The majority of services in the Network West Midlands area are operated by London Midland, other operators include Cross Country, Chiltern Railways, Virgin Trains and Arriva Trains Wales. Centro and London Midland are working closely to Transform Rail Travel in the West Midlands, together they aim to increase customer satisfaction, improve accessibility and integration with other forms of transport, improve safety and security and increase patronage and revenue.

1.1.2 The last Rail User profile was conducted in 2008, since then there have been a number of developments on the rail network.

- Patronage has continued to increase steadily year on year from 35.5 million in 2007/08 to 46.5 million in 2012/13.
- The number of park and ride spaces at station car parks has increased to a total of 7331 at 37 rail stations.
- Centro working with London Midland have worked on improvements to local stations including passenger information systems, secure stations accreditation and the 'See Something, Say Something' initiative.
- Access to stations is being improved via Station Travel Plans with investments in cycle parking, electric hook up points and car sharing bays. There has also been improvements to 'step free' access between the station entrance and platforms.
- The redevelopment of New Street Station due to open in 2015.

1.2 RESEARCH OBJECTIVES

1.2.1 The survey was designed to capture the travel patterns and socio economic profile of local rail users boarding at all stations within the West Midlands conurbation (with the exception of Bordsley Green – where the service is infrequent enough to negate the need to be included) and travelling within the Network West Midlands area.

- i) **Socio-economic profile** – journey purpose, age, gender, ethnicity, occupation, social group, employment status, car ownership and car availability for travel.
- ii) **Travel Patterns** – Frequency and times of rail travel, ticket type, length of rail use, wait time at station, mode of

travel to station, travel time to and from boarding stations, station catchment areas.

- iii) Reasons for travelling by train.
- iv) How information is obtained about rail journeys and use and access of social media.

2.0 **THE SURVEY**

2.1 **SURVEY LOCATIONS, TIMES AND DATES**

2.1.1 68 rail stations were surveyed over the survey period. Fieldwork was conducted on Weekdays (excluding Mondays and Fridays which are 'atypical' days for rail usage) between 0700-1300hh and on Saturdays between 0830-1430hh. The survey was conducted during October – November 2013. Interviewers were instructed to interview boarders only, who were making their entire rail journey within the Centro area. 2 weekday shifts and 1 Saturday shift were conducted at each station, with the aim of achieving a sample of 75 per station.

2.2 **METHODOLOGY**

2.2.1 As far as possible, to ensure comparability, the survey followed the same methodology as previous years. The questionnaire is shown by **Appendix 1**. The fieldwork and data processing aspects of the project were put out to competitive bids using Centro's Quantitative Framework Agreement, with AECOM being the winning Agency.

3.0 **RESULTS I : SOCIO-ECONOMIC STATUS**

3.1 **SURVEY SAMPLE SIZE**

3.1.1 Overall 4731 interviews were conducted over the survey period a higher amount than that conducted in 2008 (4409). A sample of this size has a sampling error of +/- 1% at a 95% confidence level. This means that if the survey were conducted 100 times then 95% of these surveys would record an answer within 1 % of that recorded here. One can therefore be confident that the true answer lies within +/- 1% of the survey findings. Sample error increases to between 3.5% and 6.8% by rail line and to around 11% per station. **See Table 1 and Appendix 2a.**

Table 1 - Survey Sample Size By Day Of Week

	Weekday	Weekend	Base	Confidence interval
Coventry	467	219	686	
%	14	15	15	3.60%
X.C.North	496	227	723	
%	15	15	15	3.50%
X.C.South	349	169	518	
%	11	11	11	4.20%
Shirley	415	124	539	
%	13	8	11	4.10%
Solihull	247	112	359	
%	8	8	8	5.10%
Walsall	362	173	535	
%	11	12	11	4.10%
Wolverhampton	300	147	447	
%	9	10	9	4.50%
Stourbridge	482	236	718	
%	15	16	15	3.50%
City Centre	142	64	206	
%	4	4	4	6.80%
Total	3260	1471	4731	1%

3.1.2 69% of interviews were conducted on a weekday and 31% on a Saturday. When looking at interview times (amongst weekday users) it can be seen that half of interviews were conducting in the morning peak (50%) with 46% conducted between 0930hh-1300hh. The break down is broadly similar to the 2008 survey. **See Appendix 2b.**

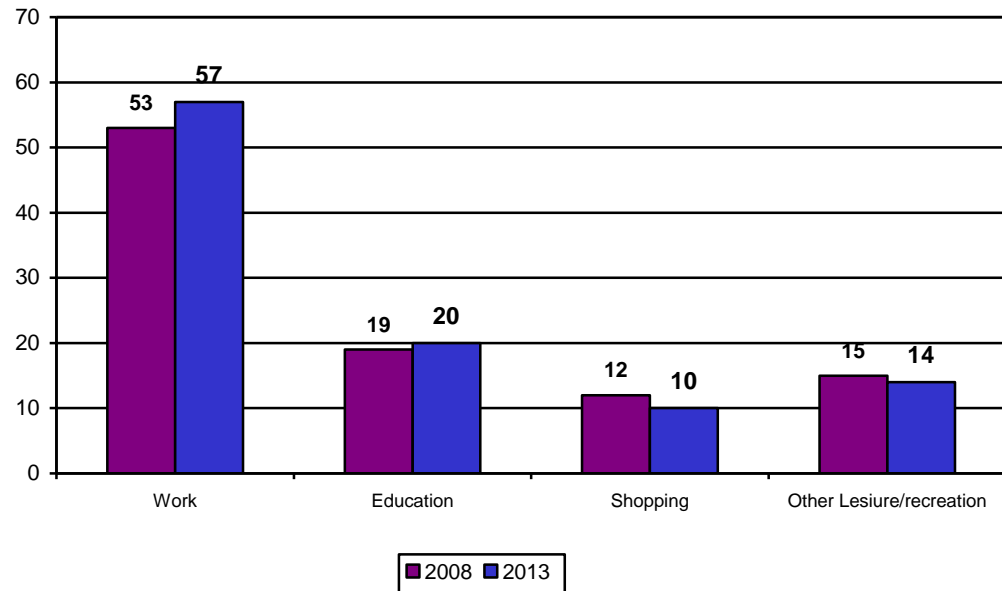
3.2 **JOURNEY PURPOSE**

3.2.1 All respondents were asked the main reason for travelling by rail from the station they were boarding the train. Overall 4 distinct groups of users; commuters, scholars, shoppers and leisure users. **See Appendices 3a to 3e.**

3.2.2

Weekday use: Commuting was the main reason for travel on a weekday, increasing to 57%. Following this 20% were making trips for education and 14% were leisure users. There was a slight decline in the proportion of weekday shoppers (10%). **See Figure 1.**

Figure 1 - Weekday Use 2008/2013

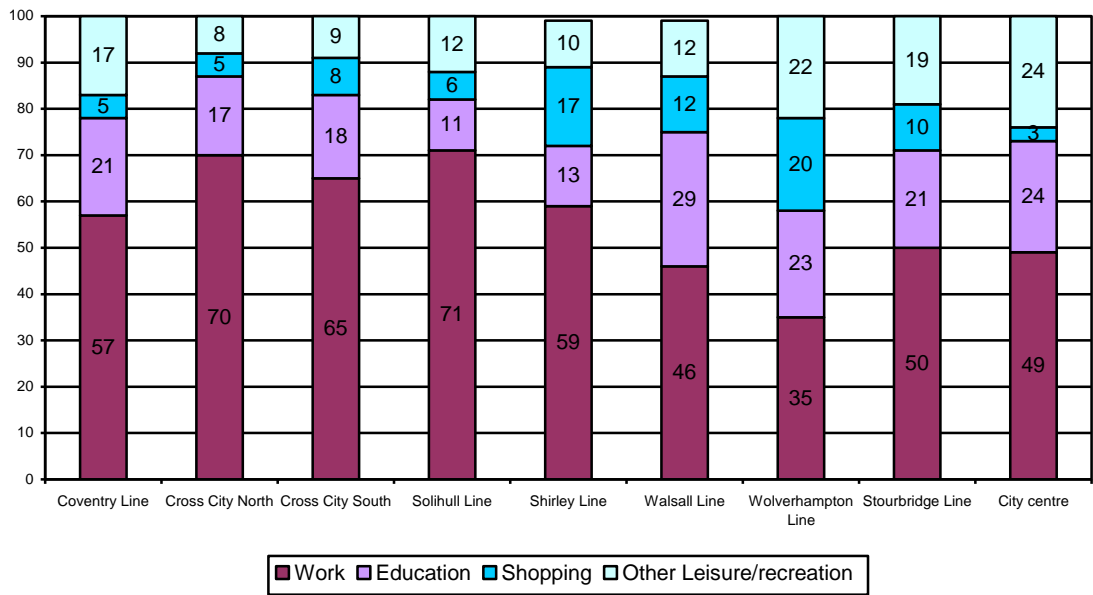


3.2.3

Weekday use by line:

- Commuting made up the largest proportion of users on all lines rising to 71% on the Solihull line, 70% on the Cross City North, and 65% on the Cross City South. Commuters accounted for significantly fewer users on the Wolverhampton line (35%) and Walsall line (46%).
- Trips for education were highest on the Coventry, Walsall, Wolverhampton, Stourbridge and Cross City lines (between 29%-21%).
- Shoppers were most prevalent on the Wolverhampton (20%) and Shirley lines (17%).
- Leisure travel was most prevalent at City Centre stations (24%) and the Walsall line (22%). **See Figure 2.**

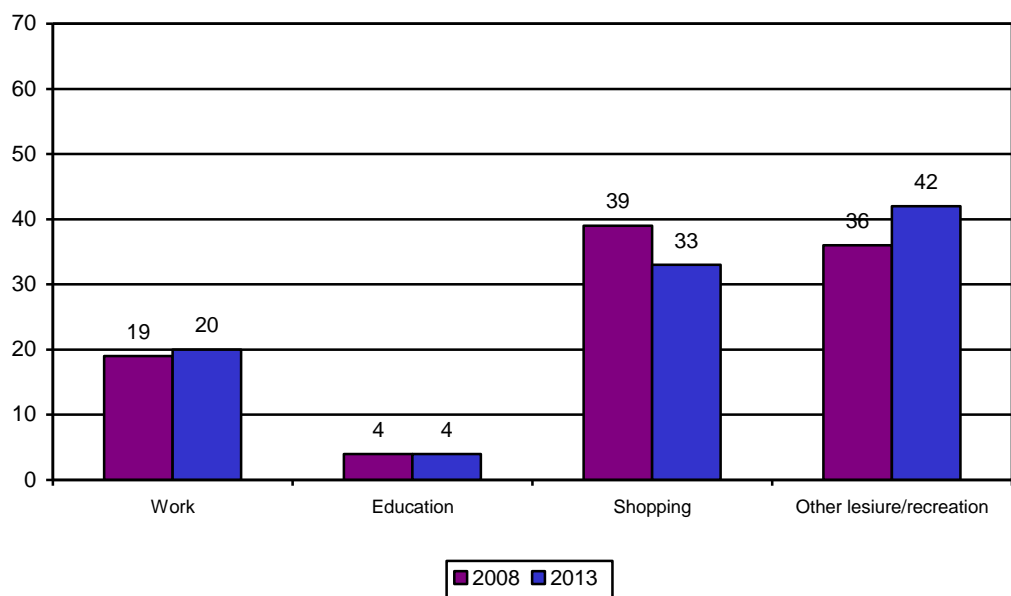
Figure 2 - Weekday Use By Line



3.2.4

Saturday use: The most common journey purpose on a Saturday continues to be leisure, which increased significantly from 2008 to 42%. Although a third travel for shopping (33%) this marks a decline from 2008. There was little change in the proportion travelling for work, which accounted for a fifth of travel (20%) and education (49%). See Figure 3 and Appendix 3b.

Figure 3 - Saturday Use 2008/2013 Compared

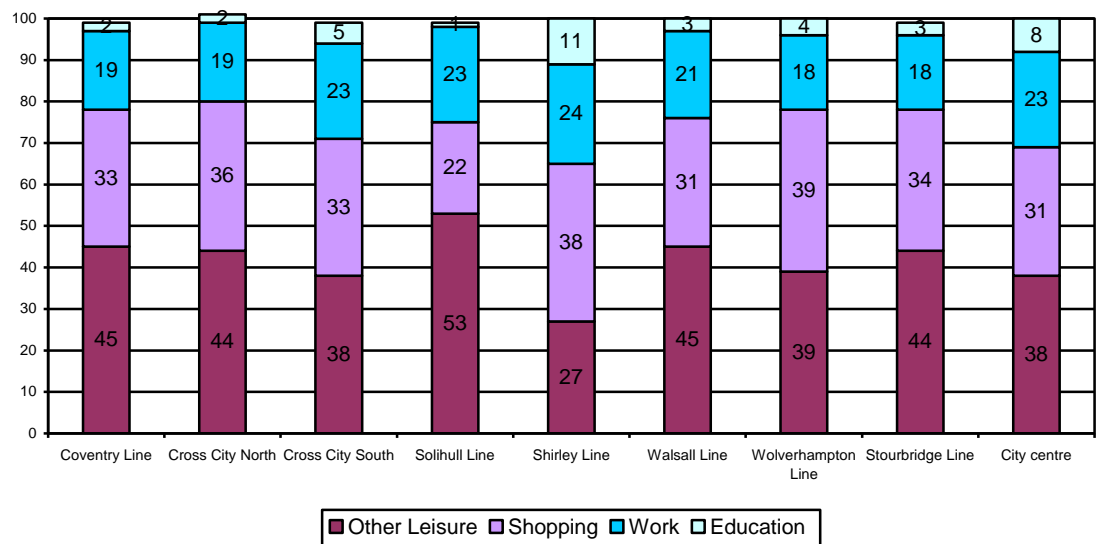


3.2.6

Saturday use by line:

- Leisure was the most common reason for travel on all but one line, accounting for over half of users on the Solihull line (53%) and around 45% on the Walsall and Coventry line. This figure dipped to 27% on the Shirley line.
- Shopping trips were most common on the Coventry, Cross City, Shirley, Wolverhampton and Stourbridge lines (accounting for between 33%-39%).
- Work accounted for around a quarter of trips (between 22% to 24%) on the Cross City South, Solihull, Shirley and City centre stations, only dipping to 18% on the Wolverhampton and Stourbridge lines. **See Figure 4.**

Figure 4 – Saturday Journey Purpose By Line



3.3 AGE PROFILE

3.3.1

Previous Rail user surveys have demonstrated the youthful nature of the local rail market in comparison to the West Midlands population as a whole, as **Figure 5** demonstrates this continues to be the case.

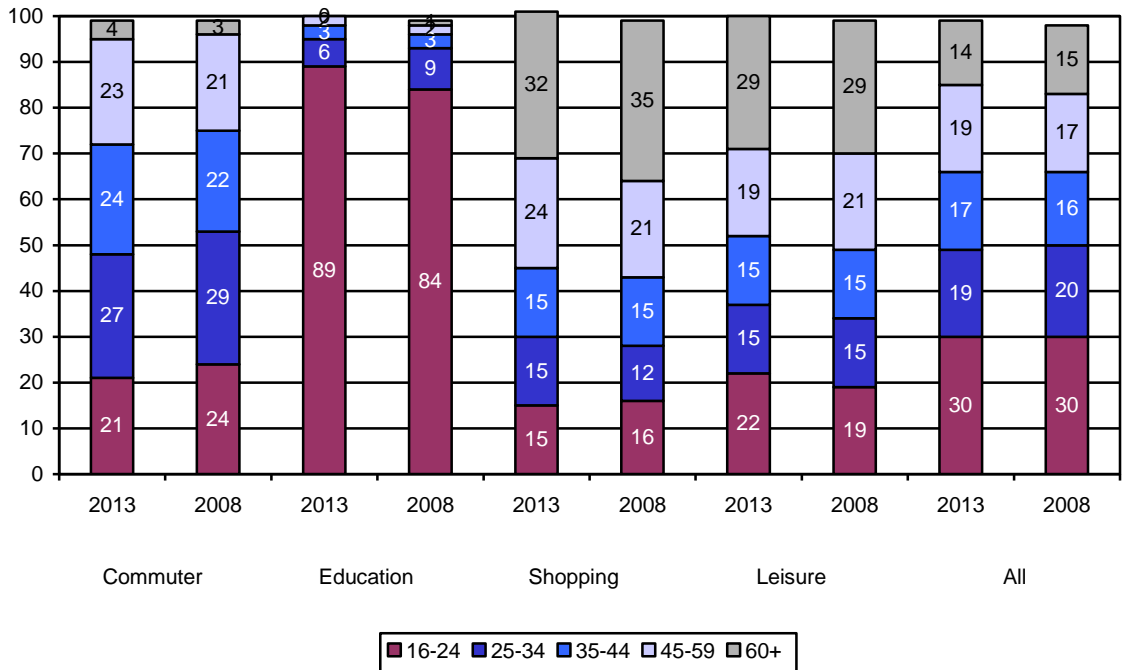
- 30% of rail users were in the youngest age group (16-24) compared to 18% of the West Midlands conurbation.
- 55% of users emanated from the age groups between 25-59, while just 14% were aged 60 and over (25%, West Midlands Conurbation).
- There was little significant change in the age profile of rail users in comparison to 2008.

3.3.2

The youthful nature of the rail market is largely explained by the dominance of commuters and scholars.

- Commuters (74%) were largely aged between 25-59, with a further 21% aged 16-24.
- The vast majority of scholars (89%, 16-24) were in the youngest age groups.
- Shopping (32%, 60+) and leisure reasons (29%, 60+) had the largest proportion of elderly users.

Figure 5 - Main Journey Purpose By Age

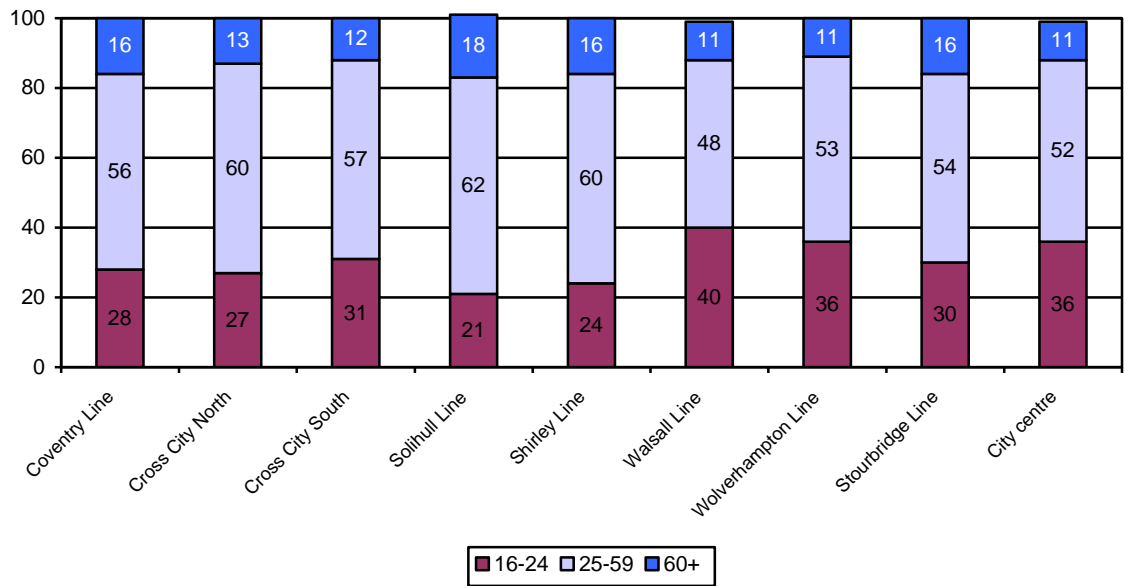


3.3.3

Age profile by line:

- The Walsall (40%, 16-24) and Wolverhampton lines (36%, 16-24), with their larger proportion of scholars, had the youngest age profile.
- The Solihull (62%), Shirley (60%) and Cross City North lines(60%), with their larger proportion of commuters had most respondents in economically active age groups (aged 25-59).
- The Solihull line continued to have the largest proportion of elderly users (18%, 60+). **See Appendices 4a and 4b.**

Figure 6 - Age Profile By Line



3.4

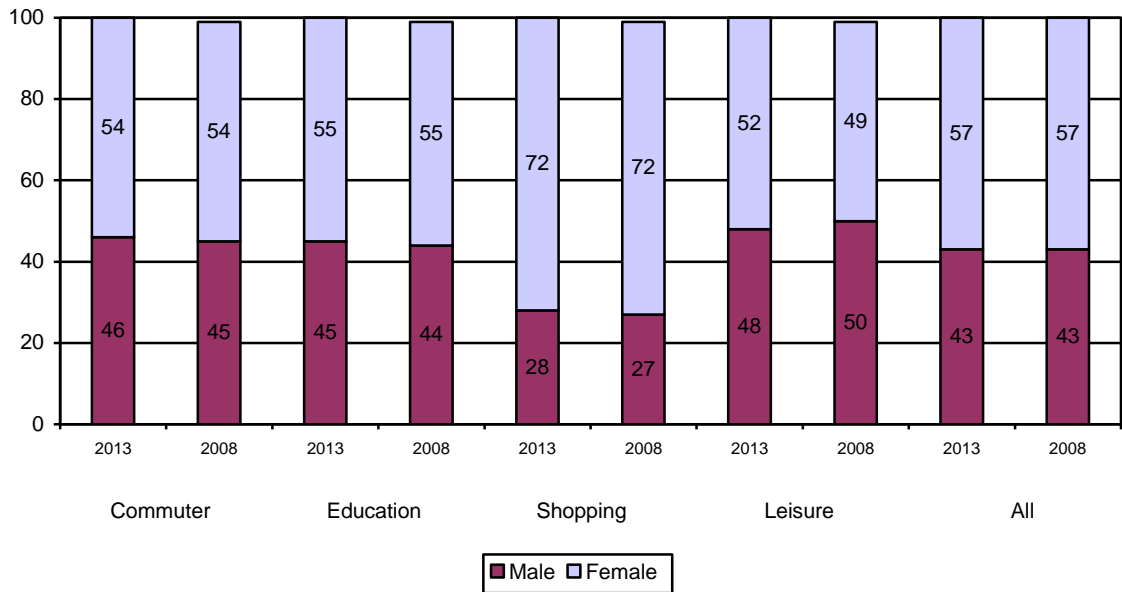
GENDER

3.4.1

Rail users have historically been more likely to be female than male, again this continues to be the case with 57% being female and 43% male, no change to the figures recorded in 2008.

- Female users were the majority group regardless of journey purpose, being most prevalent amongst shoppers (72%). They made up over half of those travelling on work (54%), education (55%) and leisure purposes (52%).
- Male respondents were least likely to be travelling for shopping (28%) accounting for between 48% to 45% of other journeys. **See Figure 7 and Appendix 5a and 5c.**

Figure 7 - Gender Rail Users (2008/2013)



3.4.2 Gender by line :

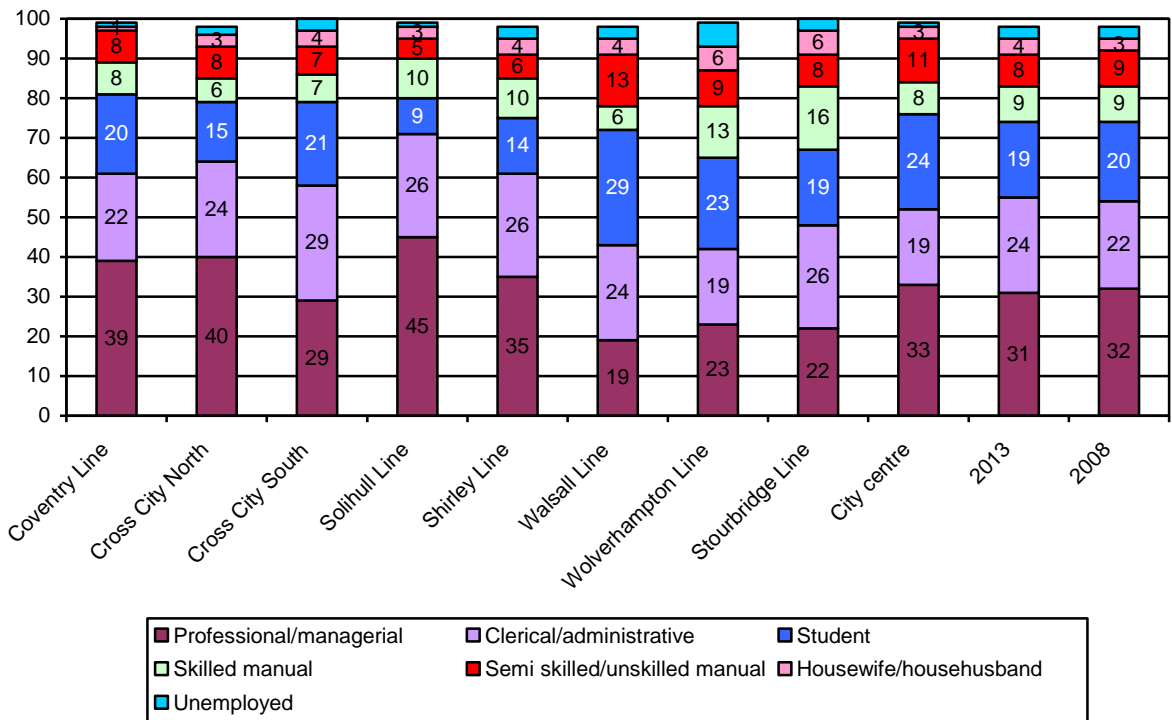
- The bias towards female respondents was noticeable along the majority of lines, particularly the City centre (63%, female).

3.5 OCCUPATIONAL TYPE, SOCIAL CLASS AND WORKING STATUS

3.5.1 The rail market continues to be made up largely of those in white collar occupations and students.

- The most commonly stated occupation was professional/managerial accounting for nearly a third of respondents (31%).
- Following this 24% were in clerical/administrative occupations, a slight increase on 2008 figures.
- 19% were students, a figure similar to that recorded in 2008.
- Fewer (9%) were skilled manual workers or semi skilled/unskilled manual workers (8%). **See Appendix 6a to 6b.**

Figure 8 - Occupation By Line



3.5.2

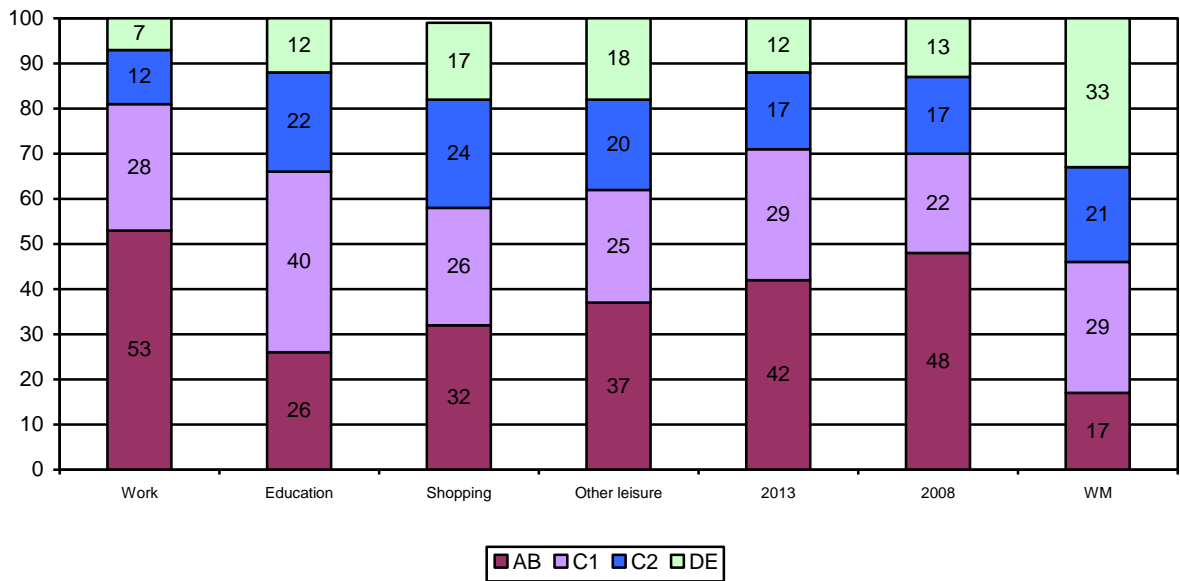
Occupation by line:

- Professional/managerial work was the main occupational grouping on the Solihull (45%), Coventry (39%), Cross City North (40%) and Shirley (35%) lines.
- Clerical/administrative workers peaked at 29% on the Cross City South accounting for a quarter of users on the Solihull (26%), Shirley (26%) and Stourbridge lines (26%).
- Significant proportions of students were found on the Walsall (29%), Wolverhampton (23%), Cross City South (21%) and City centre (24%). **See Figure 8.**

3.5.3

Social class – Rail user’s social class is estimated using head of household information. Users continue to be an affluent group with the majority (71%) emanating from white collar, non-manual ABC1 social groups (compared to 46% West Midlands Conurbation). Under a third of the sample were from less affluent C2DE groups (28%) marking little change from 2008. **See Figure 9 and Appendix 6c and 6d.**

Figure 9 - Socio-Economic Group By Journey Purpose And West Midlands Conurbation Compared



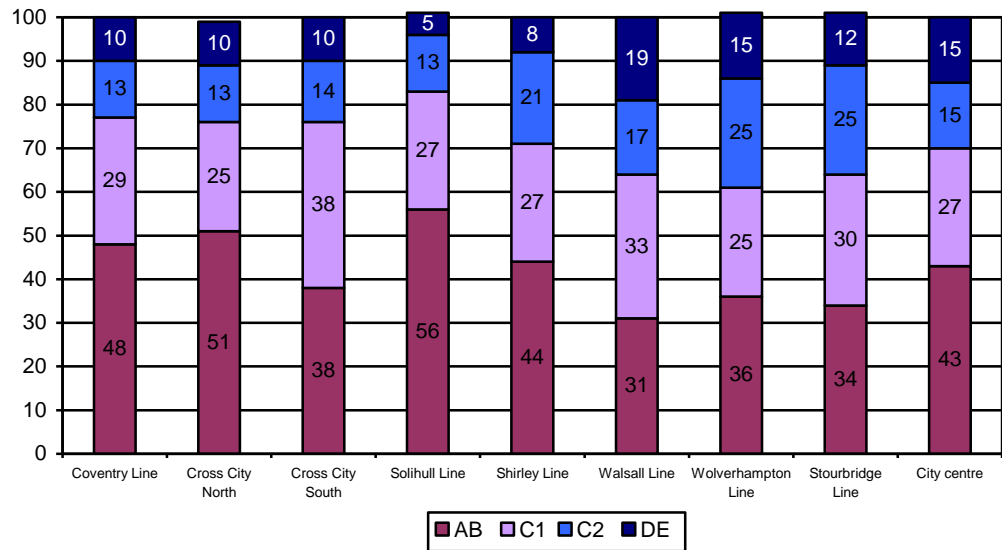
- Commuters were most likely to come from ABC1 social groups (81%), with few (7%) occupying the lowest grade DE social Group.
- 66% of scholars were also from ABC1 backgrounds, with just a third from C2DE groups (34%).
- In comparison fewer shoppers (58%) and leisure users (62%) were in ABC1 groups, however these figures are still above average for the conurbation.

3.5.4

Socio economic group by line:

- Users on all lines were predominantly from ABC1 groups. ABC1 membership was as high as 83% on the Solihull line – dipping to 60% on the Wolverhampton Line.
- Membership of the least affluent C2DE social group was highest on Wolverhampton line (40%).

Figure 10 – SEG by line

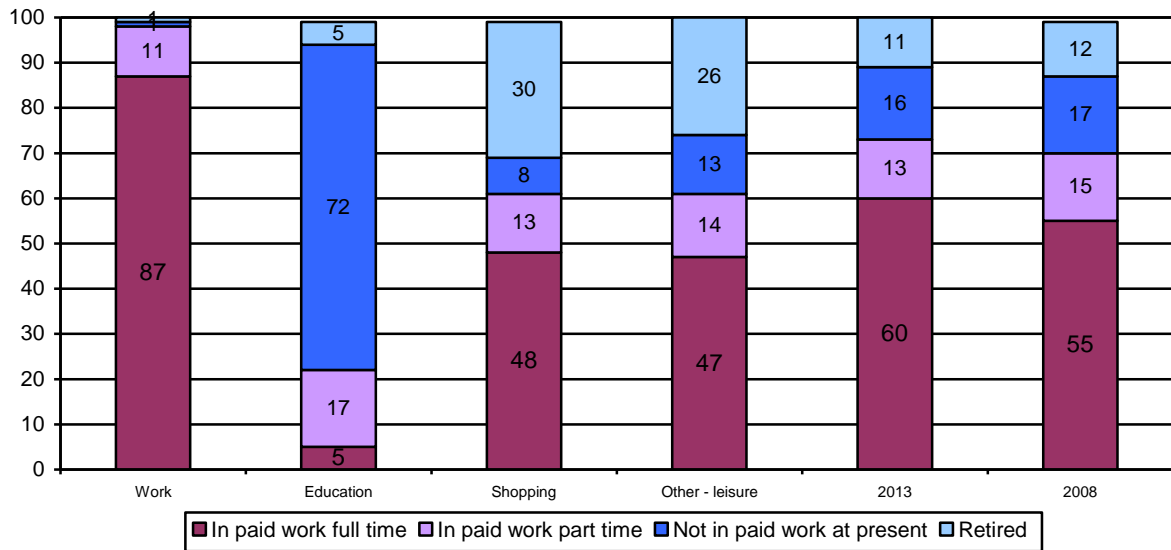


3.5.5

Working status – With the exception of housewives/ househusbands and the unemployed, respondents were asked to give their current working status. The majority were in paid full time work (60%) an increase on the 55% recorded in 2008. At the same time there was a decline in part time work (13%, down from 15%). 16% were not currently in paid work while 11% were retired. **See Figure 11 and Appendices 6e and 6f.**

- At 87% it was understandably commuters who were most likely to work full time, with a further 11% working part time.
- 48% of shoppers and 47% of leisure users also worked full time. However these groups also had the biggest proportion of people who were retired (30%, shoppers; 26% leisure).
- Few scholars had a full time job (5%) albeit the proportion working part time was at its highest amongst this group (17%).

Figure 11 - Working status by journey purpose



3.5.6 Working Status by line:

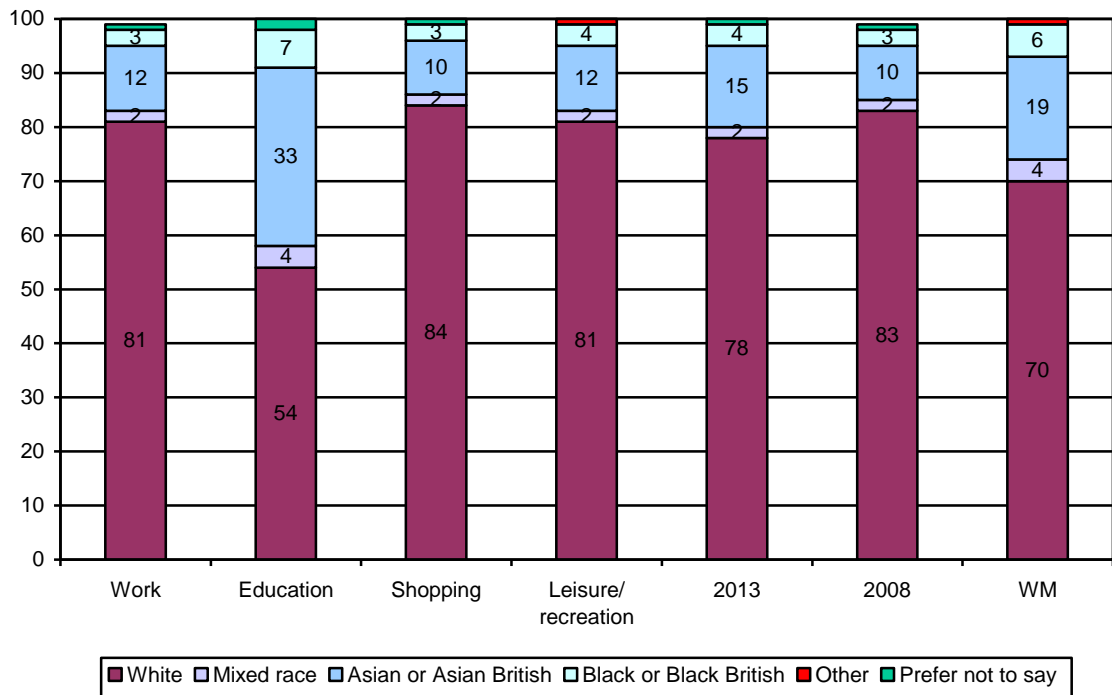
- Full time work was most common on all lines, peaking on the Solihull and the Cross City North (65%), closely followed by the Shirley (62%), Coventry and Cross City South lines (61%).
- A fifth of respondents on the Walsall (22%) and Wolverhampton lines (21%), which have a high proportion of students, were not currently in paid work.
- At 14% the Solihull line had the biggest proportion of people who were retired, matching the more elderly profile of users on this line. **See Appendix 6g.**

3.6 ETHNICITY

3.6.1 The majority of Rail users were from White backgrounds (78%), however this marks a significant decrease from the 83% recorded in 2008. A larger proportion of rail users were from BME backgrounds (21%), however rail users are still less ethnically diverse than the West Midlands conurbation as a whole (BME 30%). **See Figure 12.**

- Commuters (81%), shoppers (84%) and leisure users (87%) were the least ethnically diverse groups, with the overwhelming majority being White.
- In contrast those travelling for education were significantly more ethnically diverse. 54% were White; 33% Asian/Asian British and 7% Black/Black British. **See Appendices 7a and 7b.**

Figure 12 - Ethnicity By Journey Purpose



3.6.2

Ethnicity by line:

- There were higher proportions of ethnic minority users on the Walsall line (29%, BME) and Wolverhampton line (33%, BME).
- Users on other lines were largely White – this was particularly the case on the Solihull line (87%) and on both Cross City lines (85%, South; 86%, North). **See Appendix 7c.**

3.7

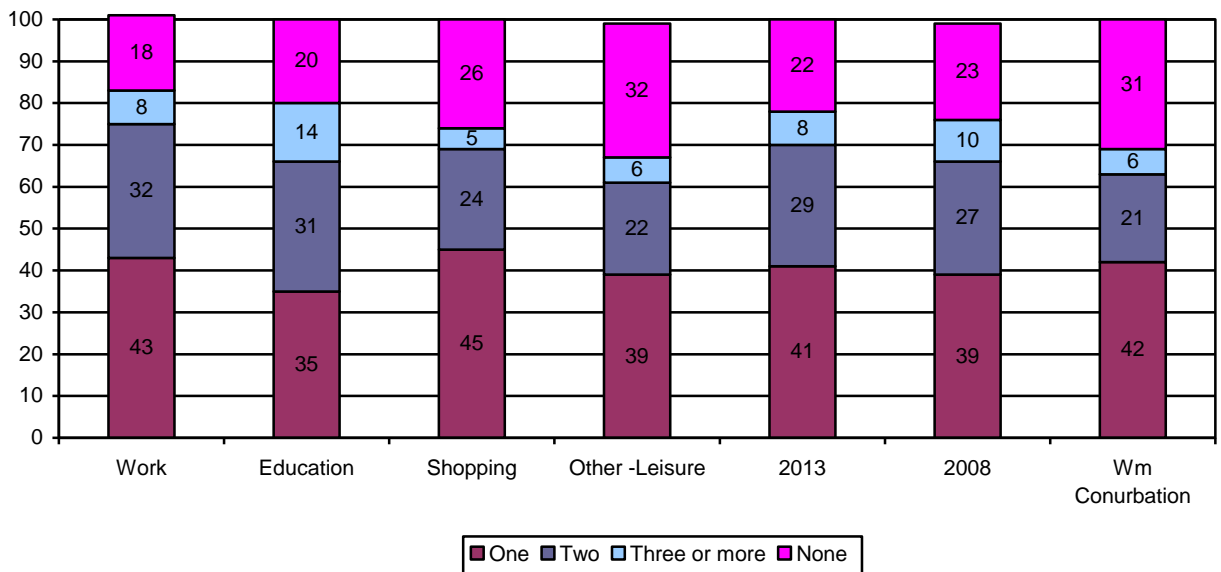
CAR OWNERSHIP AND AVAILABILITY

3.9.1

Car ownership – Reflecting the affluent profile of rail users, car ownership figures continue to be above that of the conurbation as a whole. 78% of rail users live in a household with at least one car (69%, conurbation). Non car ownership stands at 22% a figure similar to the 23% recorded in 2008. **See Figure 13.**

- Commuters (82%) and scholars (80%) were most likely to live in a car owning households, followed by 73% of shoppers.
- At 67% leisure users were least likely to own a car, albeit this figure is still slightly higher than that for the conurbation. **See Appendix 8a to 8c.**

Figure 13 - NUMBER OF CARS IN HOUSEHOLD



3.7.2

Car ownership by line:

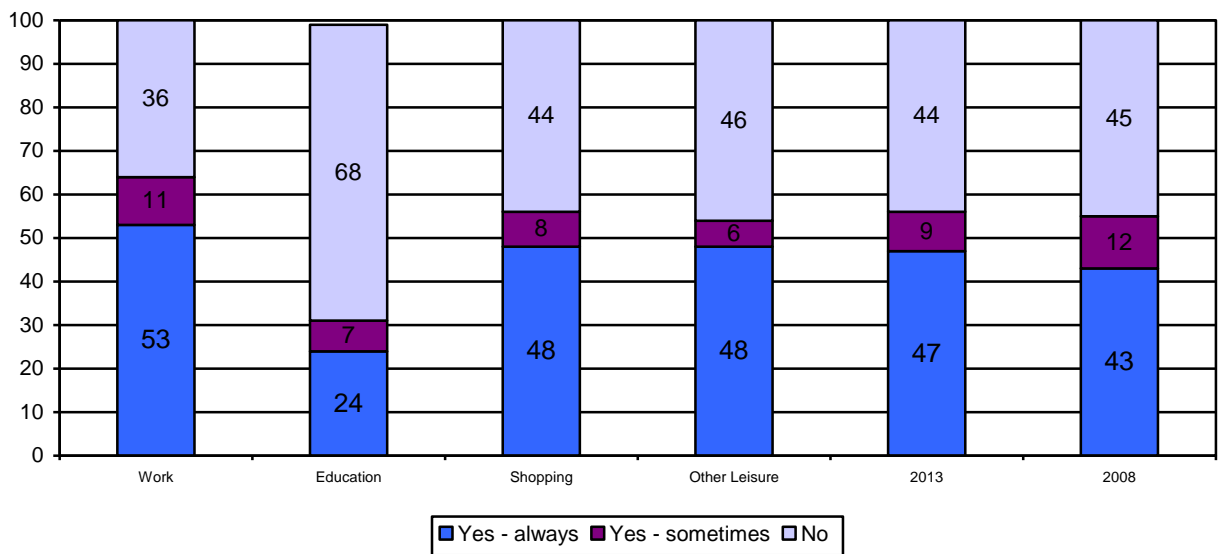
- Car ownership was highest on the Solihull (88%), Shirley (84%), Cross City North (81%) and Stourbridge lines (80%).
- Non car ownership was highest on the Cross City South, City centre (31% each), Walsall (29%) and Wolverhampton (26%) lines. **See Figure 8 and Appendix 8d and 8e.**

3.7.3

Car Availability – Respondents were further asked if they had a car available for the journey that they made by train. There was an increase in the proportion (47%, 2013; 43% 2008) stated they ‘always’ had a car available to travel in. 9% had a car available sometimes while 44% never had a car available. **See Figure 14.**

- At 53% commuters were most likely to ‘always’ have a car available, yet choose to travel by rail.
- In comparison just under half of shoppers and leisure users (48%) had a car available to use for the journey they were making by rail.
- Despite their high level of car ownership but reflecting their relative age and working status, scholars were least likely to have a car available, with the majority (68%) ‘never’ having a car available. **Appendices 8f and 8g**

Figure 14 - Car Availability By Journey Purpose



3.7.4

Car availability by line:

- Car availability rates were highest on Solihull (63% and Shirley (60%) lines.
- In line with the lower levels of car ownership, availability was lowest on the Cross City South (53%), City Centre (53%) and Walsall lines (56%) **See Appendices 8h and 8i.**

3.8

MOSIAC GROUPING

3.8.1

The latest version of Mosaic UK classifies consumers in the United Kingdom into one of 67 types and 15 groups on the basis of their home postcode. It provides an understanding of the demographics, life styles and behaviours of all in individuals and households in the UK. **Table 2** looks at the Mosaic grouping of rail users.

Table 2 : Rail users Mosaic Grouping by Main Journey Purpose

Group			Work %	Leisure %	Shopping %	Education%	Rail users %	WM pop %
A	Alpha Territory	People with substantial wealth who live in the most sought after neighbourhoods	7	4	5	5	6	3
B	Professional rewards	Experienced professionals in successful careers enjoying financial comfort in suburban or semi-rural homes	8	8	8	6	8	5
C	Rural Solitude	Residents of small villages and isolated homes where farming and tourism are economic mainstays	0	0	0	0	0	0
D	Small Town Diversity	Residents of small and medium-sized towns who have strong roots in their local community	3	5	3	4	4	4
E	Active retirement	Elders who have sufficient pensions and savings to choose pleasant locations in which to enjoy their retirement	2	2	3	1	2	3
F	suburban mindsets	Maturing families on mid-range incomes living a moderate lifestyle in suburban semis	20	16	19	15	18	14
G	Career and kids	Families with young children where both parents are likely to earn solid incomes providing for a comfortable modern home	5	5	4	3	5	3
H	New homemakers	Young singles and couples in small modern starter homes	6	3	5	4	5	5
I	Ex council community	Residents with low levels of education but sufficient incomes who live in the better right-to-buy council houses	10	10	12	12	10	12
J	Claimant culture	Families reliant on benefits living in low-rise council housing where there is widespread disadvantage	7	8	12	9	8	10
K	Upper floor living	Young, mostly single people on limited incomes renting small flats from local councils	3	3	2	4	3	6
L	Elderly needs	Elderly people who are reliant on support either through specialised accommodation or the basic state pension	2	5	3	4	3	6
M	Industrial Heritage	Families and couples owning affordable older style housing in communities historically dependent on manufacturing	7	11	8	7	8	11
N	Terraced melting pot	Lower income workers, mostly young, living in tightly packed inner urban terraces, including some areas of high diversity	12	11	12	19	13	13
O	Liberal Opinions -	Young, well-educated city dwellers enjoying the vibrancy and diversity of urban life	8	10	4	8	8	6

3.8.2 Compared to the rest of the West Midlands Rail users were more likely to come from the Alpha Territory, Professional Rewards, Suburban Mindsets, Liberal Opinion and Career and Kids Mosaic Groups. There were fewer users from the ex Council Community, Claimant Culture, Upper Floor Living, Elderly Needs and Industrial Heritage Mosaic Groups.

3.8.3 When looking at Mosaic group by journey purpose the following is of note:

- Commuters were most likely to be from Suburban Mindsets (20%). 12% were from Terraced Melting Pot and 10% from Ex Council Community. 8% each were Professional Rewards and Liberal Opinions. They were the group who had the largest proportion of users from Alpha Territory (7%).
- Scholars were most likely to come from Terraced Melting Pot (19%), with an additional 15% coming from the Suburban Mindset group, 12% were Ex Council Community and 9% Claimant Culture.
- Shoppers were also most likely to be from Suburban Mindsets (19%). 12% each were from Ex Council Community, Claimant Culture and Terraced Melting Pot.
- Leisure users were also most likely to be from Suburban Mindset (16%), 11% each were Industrial Heritage or Terraced Melting Pot, while 10% each were Ex Council Community or Liberal Opinions.

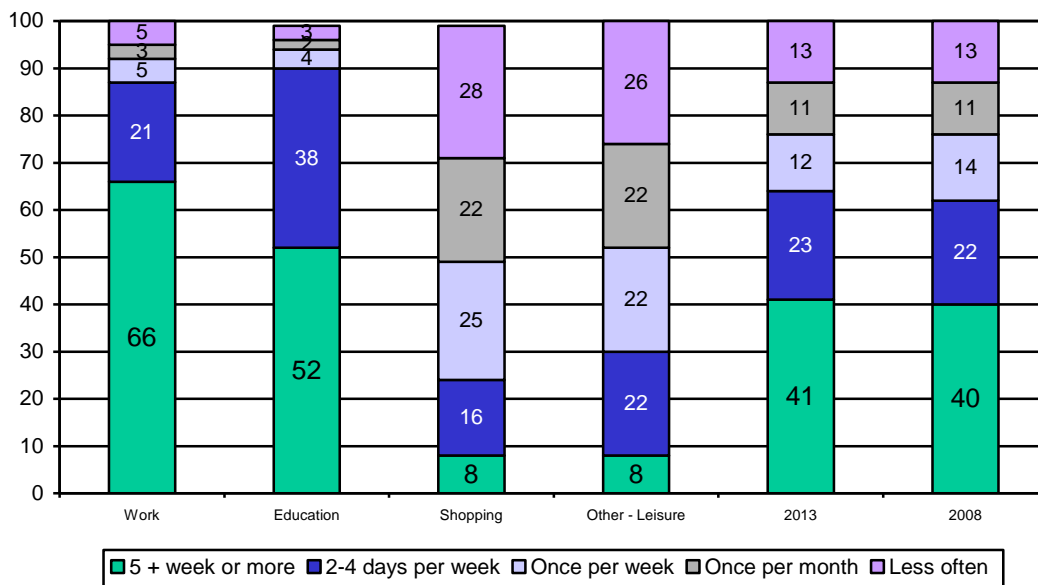
4.0 RESULTS II – TRAVEL PATTERNS

4.1 FREQUENCY OF RAIL TRAVEL

4.1.1 **Travel within Network West Midlands area:** Overall there was little change in the frequency of rail use, with the majority being regular travellers. 41% of rail users travelled daily, 23% 2-4 days per week and 12% weekly. A quarter travelled less than weekly.

- Commuters (66%) were most likely to travel daily with a further 21% travelling 2-4 days per week.
- 52% of scholars also travelled daily, while a large proportion travelled 2-4 days per week (38%).
- Shoppers (25%) and leisure users (22%) were more likely to travel weekly or monthly (22%, each). **See Figure 15 and Appendices 9a and 9b.**

Figure 15 – Frequency of travel by Journey purpose



4.1.2 Frequency of travel by line:

- Daily use was most common on the Cross City line (45% South; 49% North) and the Solihull and Shirley line (45% each).
- Travel less than once a week was most common on the Walsall (30%) and Wolverhampton lines (36%). **See Appendix 9c.**

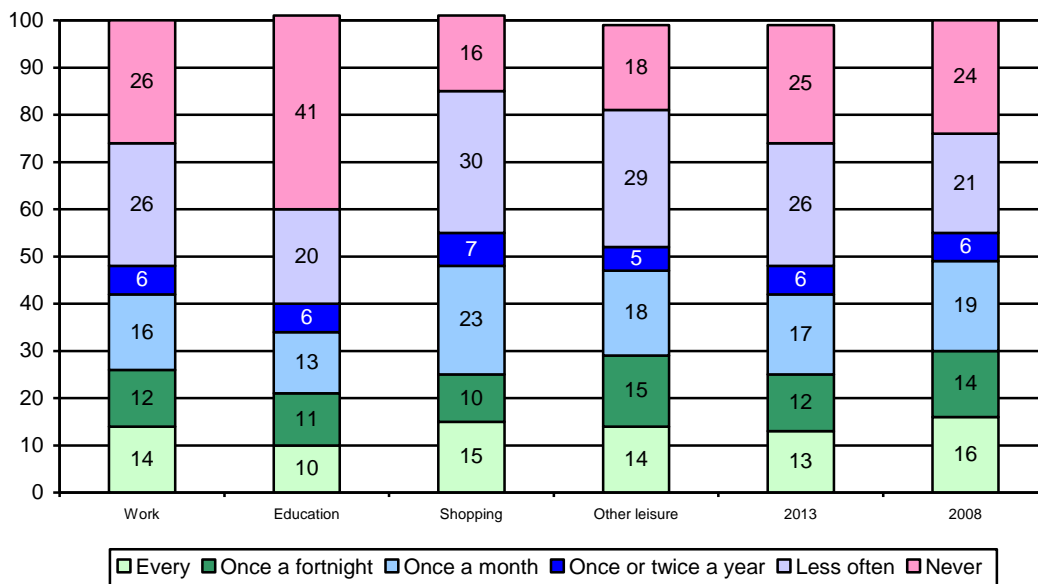
4.1.3 **Frequency of rail travel outside the West Midlands:** Rail users were additionally asked about their use of rail to travel outside the West Midlands. There was little change to 2008 figures, travel once a week or more stood at 8% while 34%

never travelled by rail outside of the West Midlands, rising to 50% on Walsall line and 44% on Wolverhampton line. **See Appendix 9d and 9f.**

4.1.4 Frequency of Saturday travel: Rail users were also asked how often they travelled by rail on a Saturday. Overall Saturday use had dipped slightly compared to 2008 with 43% travelling at least one Saturday a month compared to 49% in 2008. **See Appendices 9g and 9h.**

- Saturday use was most common amongst shoppers (48%, monthly) and leisure users (47%, monthly).
- Scholars, by some margin, were the group most likely to say they never travelled by rail on a Saturday (41%).

Figure 16 - Frequency Of Travel On A Saturday

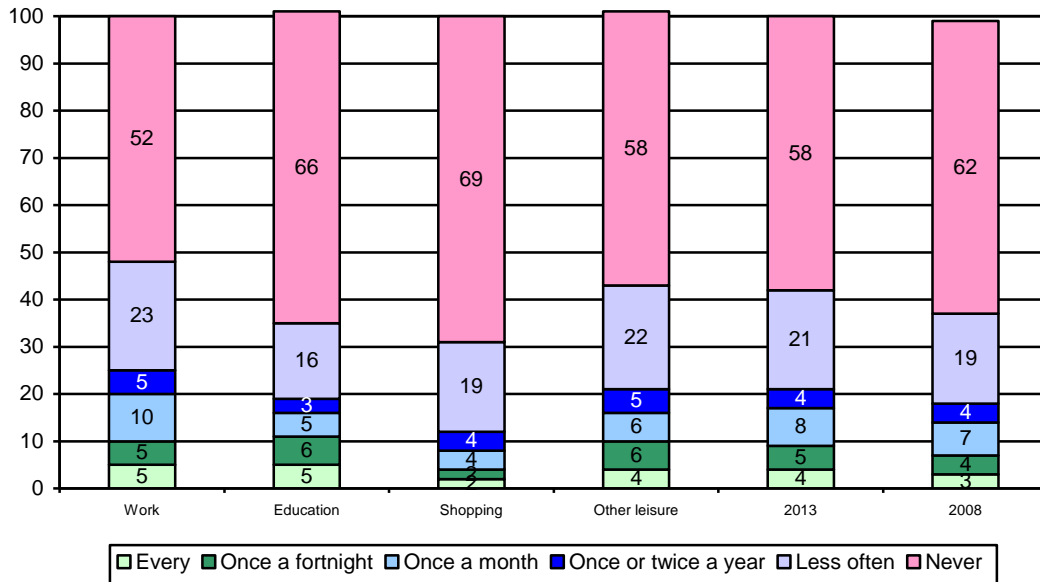


- In terms of line Saturday use was most common on the Cross City line with monthly Saturday travel standing at 57% on the Cross City South and 50% on the Cross City North.
- Respondents on the Walsall (33%) and Wolverhampton (32%) lines were most likely to never travel on a Saturday, perhaps as a result of the high proportion of scholars on this line. **See Appendix 9i.**

4.1.5 Frequency of Sunday travel: In contrast to Saturday travel, Sunday rail travel had increased with 17% of rail users now stating they travelled by rail at least one Sunday a month compared to 14% in 2008. However over half of rail users (58%) never travelled by rail on a Sunday. **See Figure 17.**

- Commuters (20%, monthly) were most likely to travel by train on a Sunday.
- In contrast scholars (66%) and shoppers (69%) were most likely to never travel on a Sunday.

Figure 17 – Frequency Of Travel On A Sunday

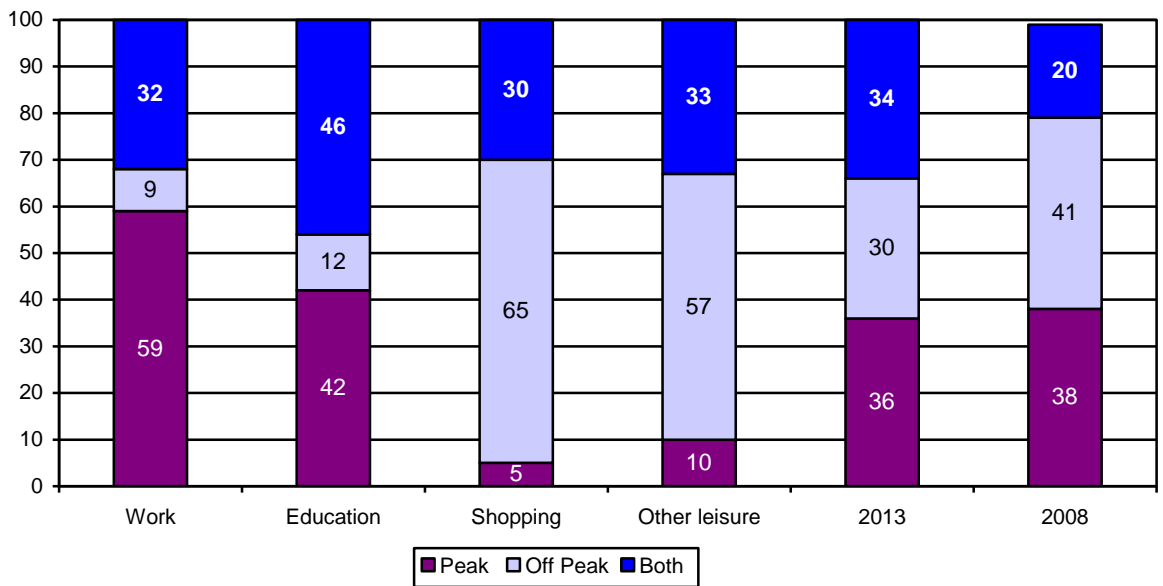


- Travel on a Sunday was most common on the Cross City line with around a quarter travelling monthly (23%, North; 24% South).
- Sunday travel was lowest on the Walsall line (74%, never) and Wolverhampton line (66%, never). **See Appendices 9j to 9l.**

4.2 USUAL TRAVEL TIMES

- 4.2.1 **Outward travel:** Respondents showed increasing flexibility in their times of outward travel compared to 2008. Overall the proportion of peak trips (36%) showed a slight decline from 2008 while there was also a decline in off peak travel (30%). However the proportion stating that they travelled during both peak/off peak hours increased from 20% to 34%. **See Figure 18.**

Figure 18 - Time Of Travel (Outward) By Journey Purpose



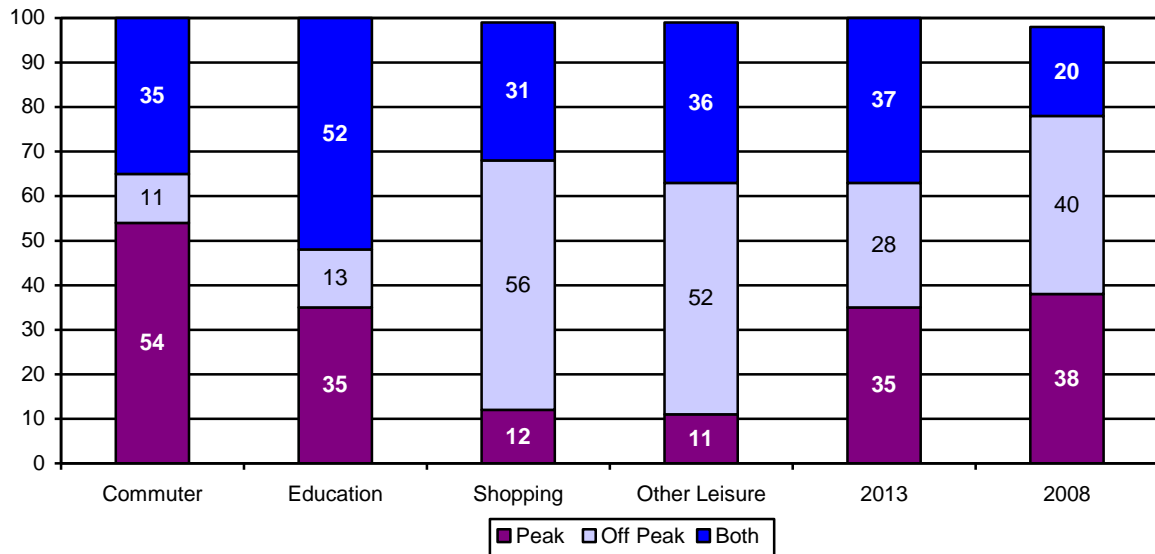
- At 59% commuters were most likely to travel during the peak, albeit this figure had dipped from 66% in 2013. More commuters stated they travelled during both peak/off peak times (32%).
- There was little change in the proportion of scholars travelling at peak times (42%), however there was an increase in the proportion travelling both peak/off peak (46%) and a decline in off peak travel (12%).
- Shopping trips (65%) and leisure trips (57%) continued to be largely off peak, albeit shopping trips also saw an increase in both peak/off peak travel. **See Appendix 10a.**

4.2.2 **Outward travel by line:**

- Peak travel was most common on the Solihull line (47%) and Cross City North, where there were the largest proportion of commuters (47%).
- Off peak use was most common on the Wolverhampton line (49%) and Stourbridge line (35%) where there were larger proportion of leisure users and shoppers. **See Appendix 10b.**

4.2.3 **Return journeys:** Respondents were also asked what time they usually made a return journey to the station. Again there was a slight decline in the proportion of trips made purely in the peak (38%) and an increase in those who said they travelled at both peak/off peak times (20%). **See Figure 19.**

Figure 19 – Time Of Travel By Journey Purpose (return)



- Commuters were most likely to return in the peak (54%), with 35% travelling both peak/off peak. There was a decrease in peak return trips and an increase in both peak/off peak travel.
- 35% of scholars returned during the peak, however they were the group most likely to travel at both peak/off peak times (52%). Scholars also saw a decrease in peak travel and an increase in travel at both peak/off peak times.
- Shopping (56%) and leisure journeys (52%) were largely off peak. **See Appendix 10c.**

4.2.5 **Return journey by line:** The Cross City North and Solihull lines had the largest proportion of users travelling in the peak (47%, each). In contrast off peak use was most common on the Wolverhampton line (44%). **See Appendix 10d.**

4.3 **TICKET TYPE TENDERED**

4.3.1 Previous surveys have indicated that the type of ticket purchased by rail users is determined very much by the type of journey made and the day of travel. Tendered ticket type is summarised by journey purpose/day of week in **Table 3.**

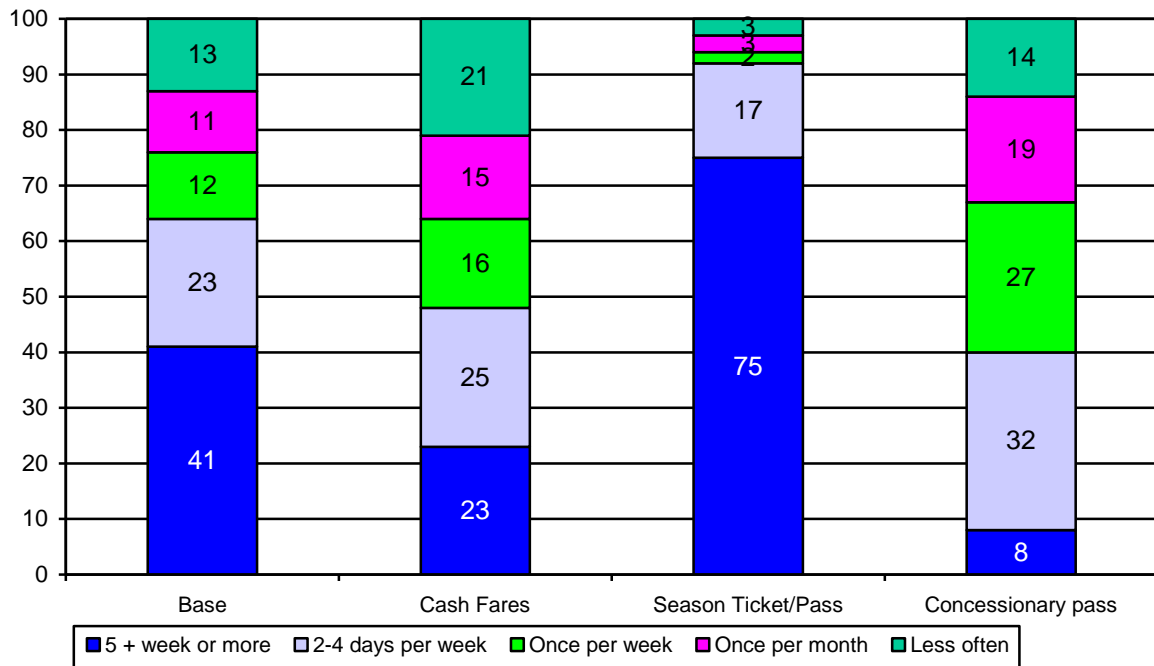
4.3.2 Overall there has been an increase in the proportion of season ticket/pass holders (39%). There was little change in the proportion paying a cash fare (50%), however there was a decrease in concessionary pass users (11%).

Table 3 - Ticket Type Tendered By Purpose/Day Of Travel

	All commuters	Education weekday	Other Leisure weekday	Saturday (non workers)	2013	2008
Cash fare	41	40	60	66	50	51
ntrain season ticket	42	15	2	4	23	
nNetwork Season ticket	8	7	1	3	5	
nNetwork One day	1	0	0	0	0	
nNetwork Daytripper	1	1	4	2	1	
nNetwork Dayranger	0	0	0	0	0	
nNetwork student	0	30	1	2	5	
nNetwork Off Peak	1	1	1	1	1	
16-18 season ticket	0	2	0	0	0	
Other student pass/term pass	0	2	0	0	0	
Other season ticket	4	0	0	1	2	
Season tickets/pass	56	60	9	14	39	35
Concessionary pass	2	1	31	20	11	14
Other	1	0	1	1	1	0
No reply	0	0	0	0	0	
Base	2145	639	776	1167	4727	

- There was little change in the proportion of commuter's travelling with a season ticket (56%) or a cash fare (41%). Commuters continued to be most likely to use an ntrain season ticket (42%), followed by a return ticket (34%).
- In 2008 47% of scholar purchased a season ticket, positively this increased to (60%) with a reduction in those travelling on a cash fare (40% 2013). 30% of students used a nNetwork student, 15% and ntrain , while 31% purchased a return ticket.
- Other weekday users showed little change in ticket type purchased with cash fares (61%) and concessionary passes (29%) being the most commonly used tickets.
- On a Saturday cash fares were also the most commonly used ticket type at 66%, followed by concessionary passes (20%). **See Figure 20.**

Figure 20 – Ticket Type By Frequency Of Travel



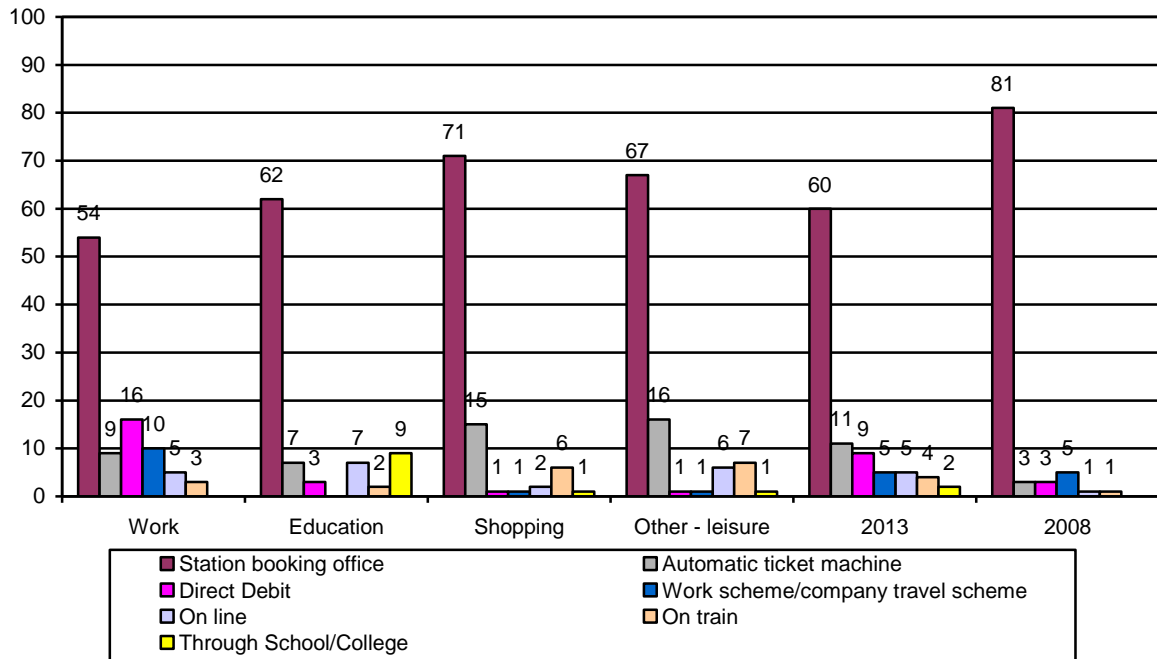
4.3.3 When looking at frequency of travel by ticket type tendered the following is of note.

- Season ticket/pass holders tended to be daily users (75%), with a further 17% travelling between 2-4 days per week.
- Those paying a cash fare travelled less frequently with 25% travelling 2-4 days per week and 16% once a week.
- However nearly a quarter of cash fare users travelled by rail daily yet did not purchase a season ticket (23%). **See Appendices 11b and 11c.**

4.4 **TICKET PURCHASE POINT BY TICKET TYPE TENDERED**

4.4.1 There have been significant changes in the ways rail users purchase their tickets compared to 2008. The majority of respondents (60%) purchased their ticket at the station booking office, however this is a marked decrease on the 81% reported in 2008. At the same time there was an increase in Automatic Ticket Machine use (11%, up from 3%), direct debit (9%, up from 3%), online (5% up from 1%) and on train purchase. **See Figure 21 and Appendix 12a to 12c.**

Figure 21 – Ticket Purchase Point 2013/2008



- All groups were most likely to use the booking office, peaking at 71% amongst shoppers, dipping to just over half of commuters (54%) However use of the booking office had decreased amongst all these groups.
- Commuters saw an increase in ticket purchased by Direct Debit (16%) and Automatic Ticket machines (9%). 10% used a work scheme/company travel scheme.
- Scholars also saw an increase in use of ticket machines (7%), online (7%) and through school/college (9%).
- Shoppers and leisure users saw an increase in purchase from the ticket machine and on train.

4.4.3

Table 3 looks in more details at where specific tickets were purchased.

- There was a reduction in Cash Fares being purchased at booking office (71%, 2013; 90% 2008) and an increase in the proportion using automatic ticket machine (18%, 2013; 5% 2008).
- Fewer season ticket were purchased at the ticket office (47%, 2013; 69% 2008) with rail users increasingly using direct debit (20%) and online (7%). **See Table 3.**

Table 4 - Ticket Purchase Point By Ticket Type Tendered

	Cash fares 2008	Cash fares 2013	Season Tickets /passes 2008	Season Tickets /passes 2013
Station booking office	90	71	69	47
Automatic ticket machine	5	18	1	2
Direct Debit	0	0	8	20
Work scheme/ company travel scheme	0	1	11	11
Online	1	4	2	7
On train	2	6	0	1
Through School/College	0	0	0	4
Travel centre/shop	0	0	6	4
Newsagents	0	0	1	2
On bus	0	0	0	1
Post	0	0	2	1
Other	0	0	0	1
Base	2246	2371	1367	1821

4.5

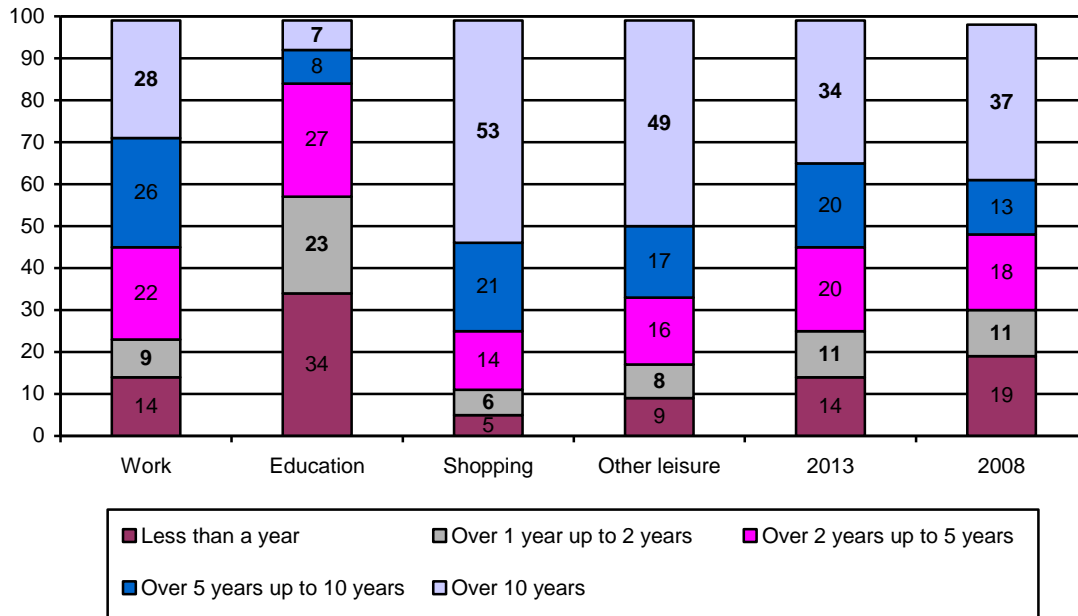
LENGTH OF TIME USING RAIL NETWORK

4.5.1

Respondents were asked how long they had travelled by local rail. There was a decrease in the proportion of new users to the rail market (14%, less than a year). 21% had been travelling by rail for between 1 and 5 years, while 54% had used the train for over 5 years. **See Appendix 13a to 13b.**

- Scholars were most likely to be new users (34%), with an additional 23% travelling between 1 to 2 years.
- 14% of commuters had also been travelling by train for less than a year, with an additional 9% between 1 to 2 years, 53% over 5 years.
- Shoppers (74%, over 5 years) and leisure users (67%, over 5 years) were most likely to be long term users. **See Figure 22.**

Figure 22 - New And Established Rail Users Compared

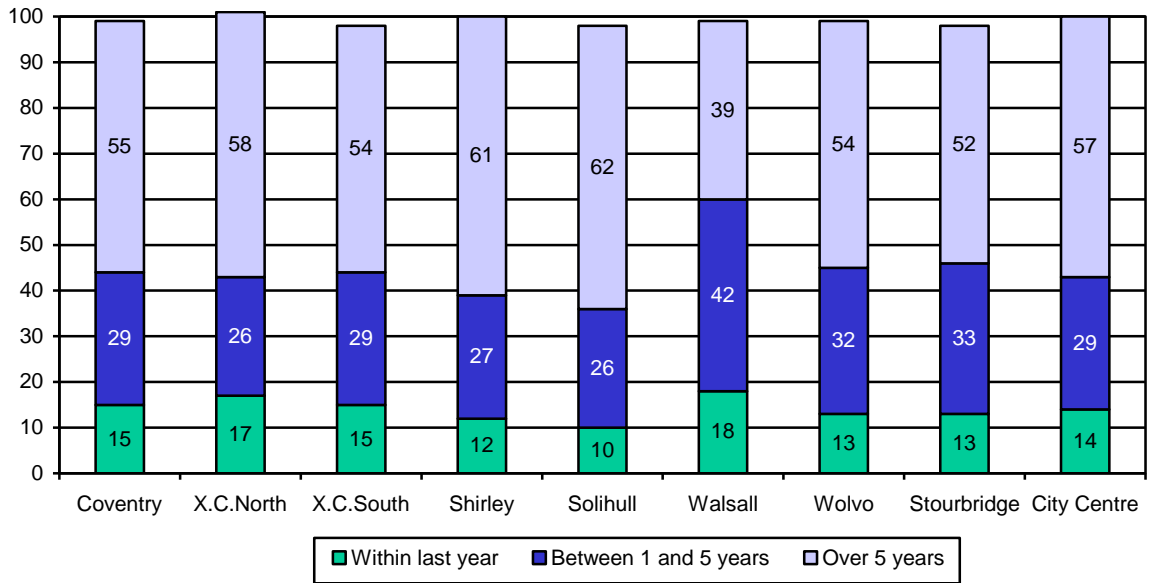


4.5.2

Longevity of use by line:

- New use was more common on the Walsall line (15%) and Cross City North (17%).
- The Solihull line had the highest level of long term users (62%), closely followed by the Shirley line (61%). **See Figure 23 and Appendix 13c.**

Figure 23 – Longevity Of Use By Line

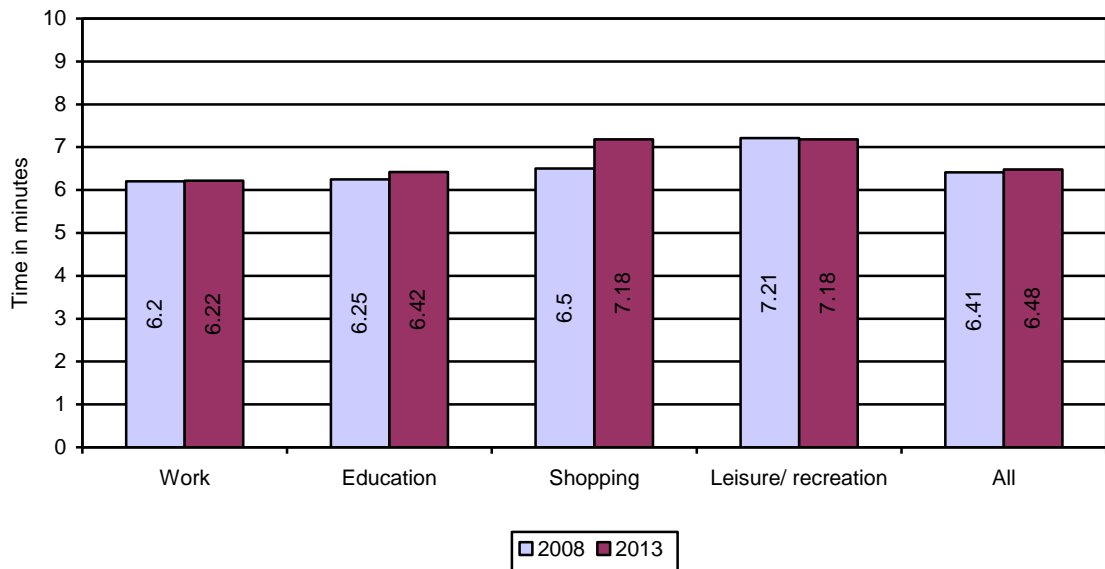


4.6 USUAL WAIT TIME AT STATION

4.6.1 Everyone was asked; if their train was running on time how long they usually waited at the station. On average respondents waited 6 minutes and 48 seconds for a train, similar to the the 6 minutes and 41 seconds recorded in 2008. **Appendix 14a.**

- Commuters (6 minutes 22 seconds) and scholars (6 minutes and 42 seconds) had the shortest wait times.
- Shoppers and leisure users at (7 minutes 18 seconds, each) had a longer wait time, indeed the biggest increase in wait time came amongst shoppers, with little significant increase amongst other groups. **See Figure 24.**

Figure 24 - Average Wait Time 2008/2013 Compared

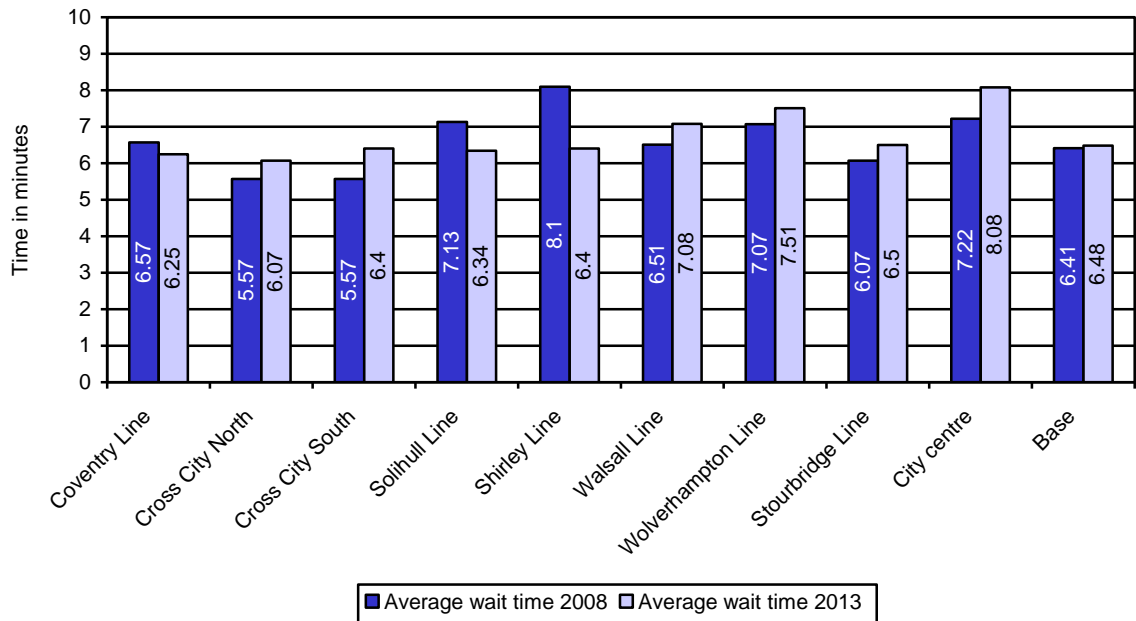


4.6.2

Average wait time by line:

- Wait times were lowest on Cross City North line (6 minutes 7 seconds) and Coventry Line (6 minutes and 25 seconds).
- City centre stations had the longest wait time (8 minutes and 8 seconds) followed by the Wolverhampton line (7 minutes and 51 seconds).
- Overall wait times had decreased on the Shirley, Solihull and Coventry lines.
- The biggest increases in wait times were at the City centre and on the Cross City South. **See Appendices 14c and 14d.**

Figure 25 - Usual Wait Time By Line



4.7

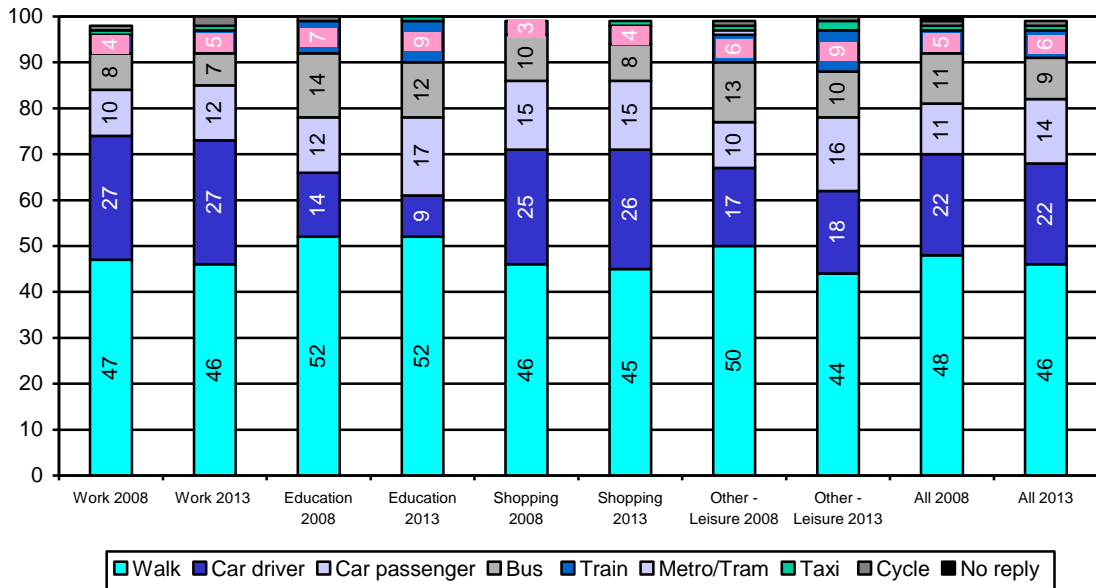
MODE OF TRAVEL TO STATION

4.7.1

Walking (46%) continued to be the most common mode of travel to rail stations. Perhaps unsurprising considering the high level of car ownership amongst rail users a significant proportion accessed the station by car (22%), car drivers; 14% car passengers). 9% had travelled by bus, 6% by train and 1% by cycle. In comparison to 2008 there was an increase in travel as a car passenger, with a decrease in the proportion walking or travelling by bus. **See Figure 26.**

- Walking was the main mode of travel regardless of journey purpose peaking at 52% amongst scholars dipping to 44% amongst leisure users.
- Commuters saw little change in mode of travel since 2008 with walking (46%) and driving (27%) remaining the main ways to travel, albeit there was a slight increase in travel as a car passenger (12%).
- Amongst scholars there was an increase in travel as a car passenger (17%), at the same time there was a decline in car drivers (9%) and bus users (12%).
- Leisure users also saw an increase in travel as a car passenger (16%) and a decline in walking trips (44%) and bus trips (10%).
- The mode of travel of shoppers changed very little with walking and car driving being most common. **See Appendix 15a and 15b.**

Figure 26 – Mode Of Travel By Journey Purpose

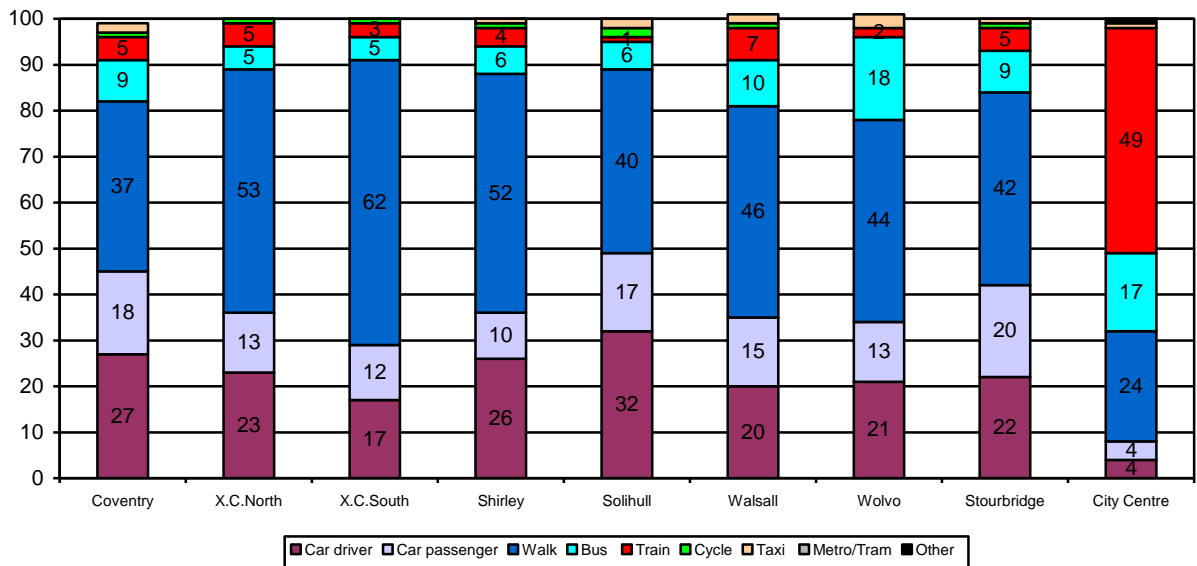


4.7.4

Mode of travel by line:

- Walking was the most common mode of travel along the majority of lines albeit it was at its highest on the Cross City South (62%).
- Car driving was most prevalent amongst users on the Solihull (32%) and Coventry line (27%), it was at its lowest on the Cross City South (17%), where car ownership was relatively low.
- Bus use was highest on the Wolverhampton (18%), City centre (17%) and Walsall lines (10%).
- At the City centre stations perhaps unsurprisingly the main mode of travel was train (49%). **See Figure 27.**

Figure 27 - Mode Of Travel By Line



4.7.2

Table 5 further examines the influence of car availability on mode of travel.

- Where a car is 'always' available for travel, 57%, take advantage of it to travel to the station either as a driver (45%) or a passenger (12%), indicating the importance of the car amongst this sizable group of respondents to access the station. Other modes of travel such as walking (32%) and bus (4%) dip amongst this group.
- Where a car is not available, walking (60%) and bus (14%) become more important. **See Table 4.**

Table 5 - Mode Of Travel To Station By Car Availability

	Yes - always	Yes - sometimes	No	2013	2008
Walk	32	52	60	46	48
Car driver	45	7	1	22	22
Car passenger	12	27	15	14	11
Bus	4	8	14	9	11
Train	5	3	8	6	5
Taxi	1	1	2	1	1
Cycle	1	1	1	1	1
No reply	0	0	0	0	1
Base	2207	404	2101	4731	4409

4.7.3

It is not only car availability but the availability of free park and ride that is attractive to rail users who have a car available to travel. As **Table 5** indicates, car driving rises to 32% at stations with a free car park and travel as a car passenger to 17%.

Indeed travel as a car passenger to park and ride stations has increased since 2008.

- 4.7.4 Where there is no free parking (e.g. no car park or user has to pay for parking) car driving decreases to 10%. Travel as a car passenger is also less likely (11%), albeit both car driving and car passenger increased from 2008. **See Table 6 and Appendix 15e.**

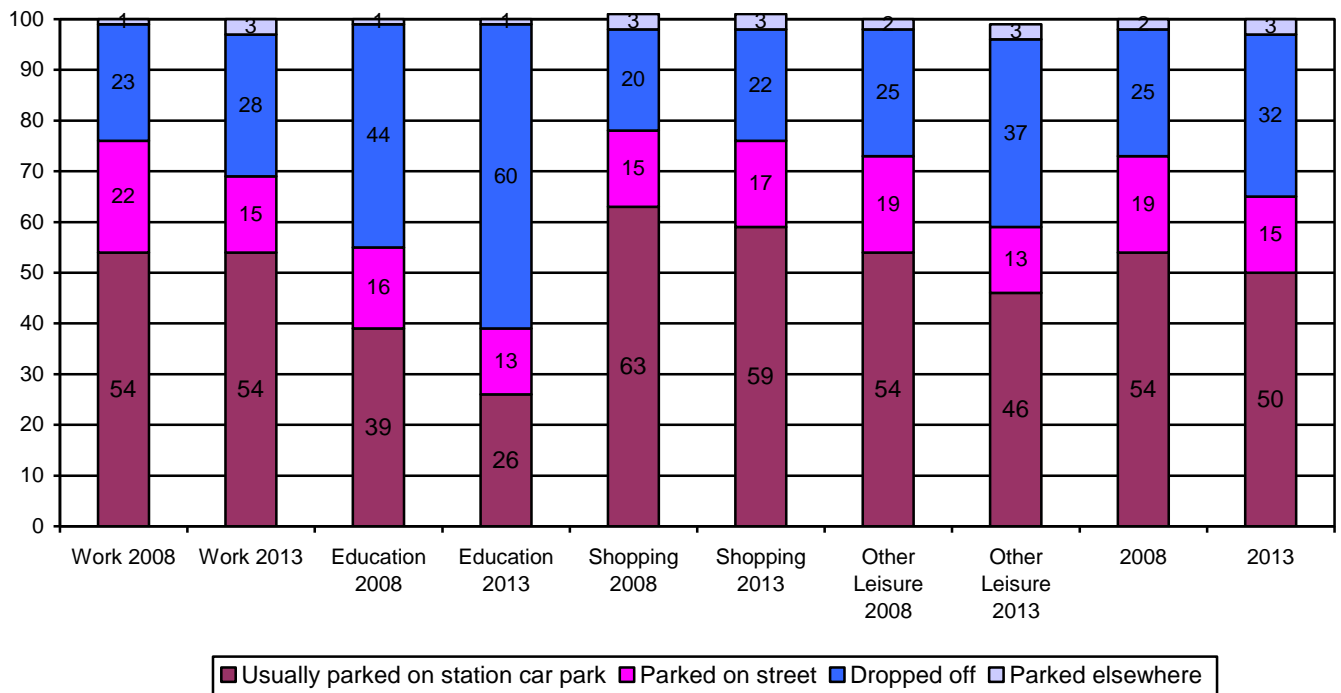
Table 6 – % Car Travel To Stations With And Without Free Parking

	Free parking		No free parking	
	2013	2008	2013	2008
Car driver	32	33	10	8
Car passenger	17	14	11	8

4.8 USE OF CAR PARKS AND LEVEL OF ON STREET PARKING AMONGST CAR BOURN TRAVELLERS

- 4.8.1 The following section further examines whether those who travel by car to the station leave their car at or near the station or whether they were dropped off. Overall there had been a decline in the proportion of car users parking on the station car park (50%) and in the proportion parking on street (15%). At the same time there was an increase in the proportion being dropped off at the rail station (32%). As a note to reader, car parking occupancy remains largely at capacity, therefore results of modal share are not reflective of park and ride usage. **See Figure 28 and Appendix 16a to 16c.**

Figure 28 - Nature And Extent Of Parking At Stations



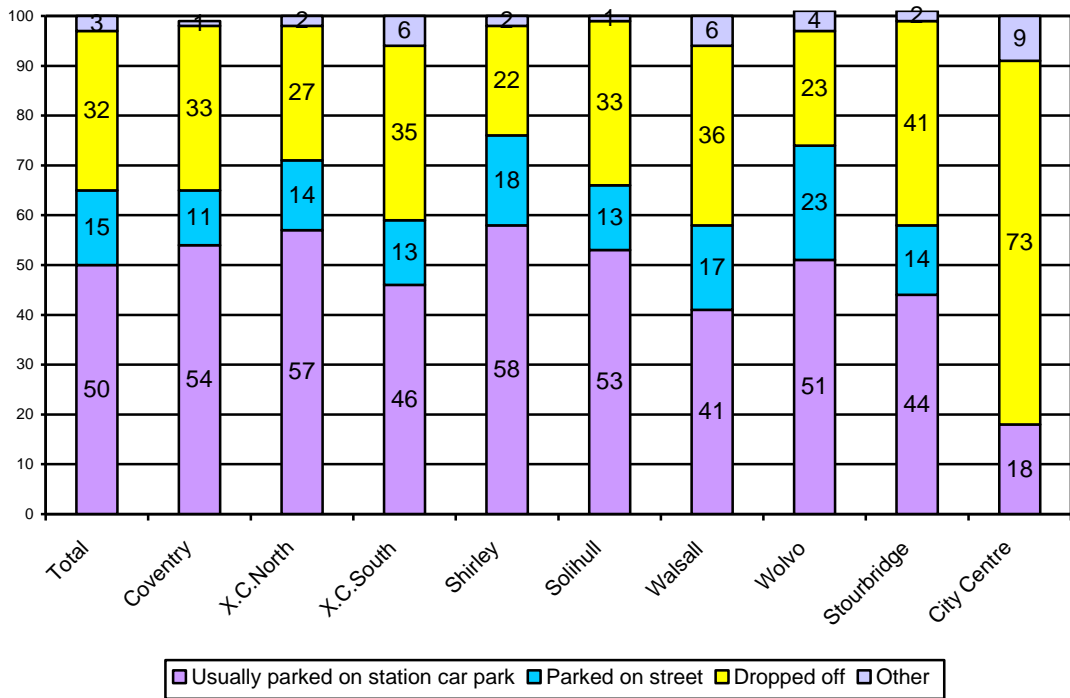
- There was little change in the proportion of commuters parking on the station car park (54%), however more commuters were being dropped off (28%) while less were parking on street. (15%).
- A higher proportion of scholars had been dropped off (60%), with a decline in parking at the station (26%) and on street (13%).
- Leisure users also saw a decrease in parking on the station car park (46%) and in on street parking (13%) with considerably more passengers being dropped off (37%).
- There was also a decline in the proportion of shoppers parking on the station car park (39%) with a slight increase in on street parking (17%) and in passengers being dropped off (22%). **See Appendix 16a to 16c.**

4.8.3 Location of cars used to travel to station by line. The following section looks at location of cars by line.

- Use of station car parks was highest on the Shirley (58%) and Cross City North (57%).
- City centre users tended to be dropped off (73%). Being dropped off also accounted for 41% of users on the Stourbridge line.

- Although on street parking had declined overall it rose on the Wolverhampton (23%), Shirley (18%) and Walsall lines (17%).
See Appendix 16d.

Figure 29 : location of parked cars used to travel to station by line

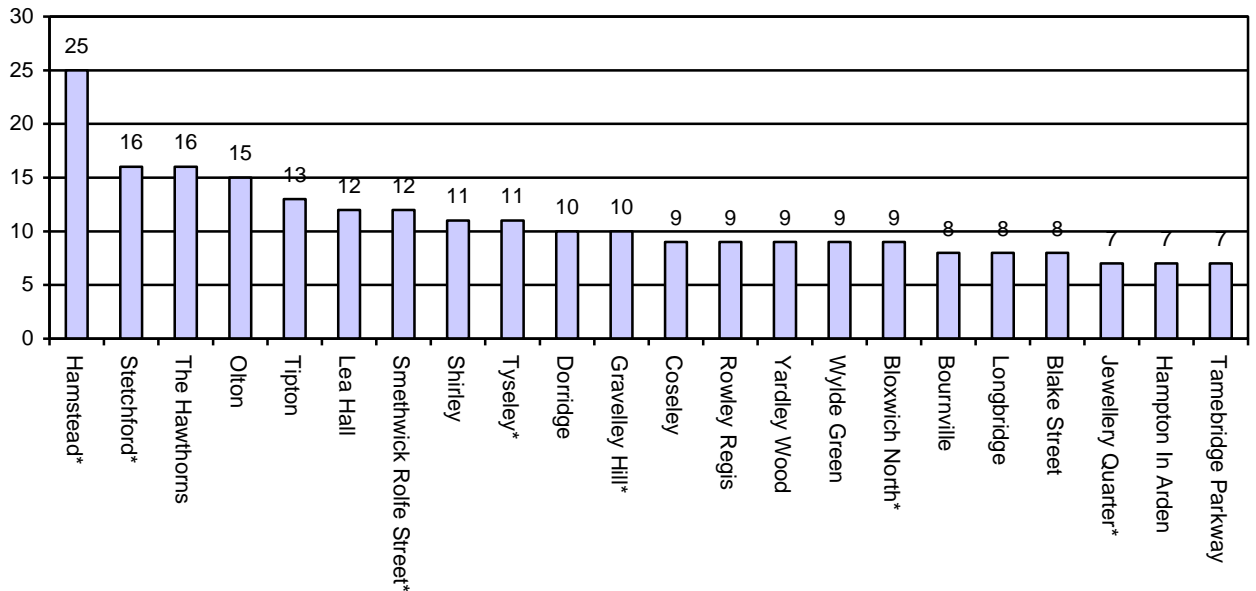


- When looking at on street parking as a proportion of station users in more detail it can be seen that it was highest at Hamstead (25%), Stetchford (16%), Hawthorns (16%), Olton (15%) and Tipton (13%).
- No on street parking was report understandably at City Centre stations or Birmingham International. There was also none recorded at Aston, Witton, Bescot, Northfield, University Canley, Earlswood, Lye, Solihull or Whitlocks End.
See Appendix 16e.

Figure 30 – % Of Station Users Parking On Street By Individual Station

Stations where % users over 5% only

**no park and ride*

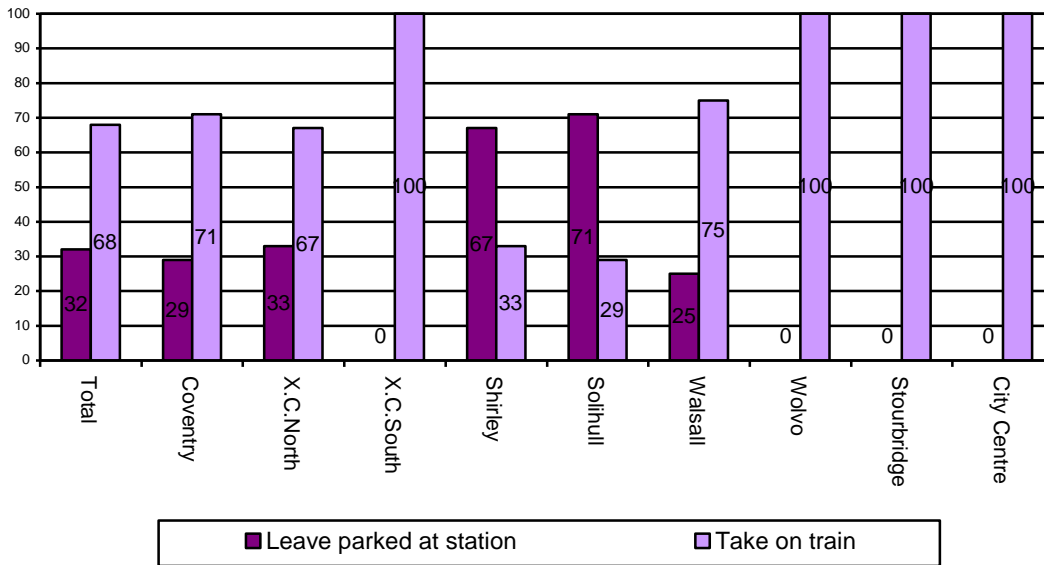


4.9 CYCLE USE AT STATIONS

4.9.1 Respondents who cycled to stations were further asked if they left their bike at the rail station or took it with them on the train. It should be noted that only 38 of the 45 cyclists responded to this question. **See Appendix 17a to 17b.**

4.9.2 32% of cyclists would leave their bike at the station, however 68% would take the bike with them on the train. This trend was noted amongst both commuters (66%) and scholars (67%) – the groups most likely to travel by bike to the station. **Figure 31** summarises the results by line – though caution is advised due to small sample size it does appear that only on the Solihull and Shirley line was cycle parking at the station more popular than taking the bike on the train.

Figure 31 – Cycle Parking At Station



4.10 TRAVEL TIME TO BOARDING STATION

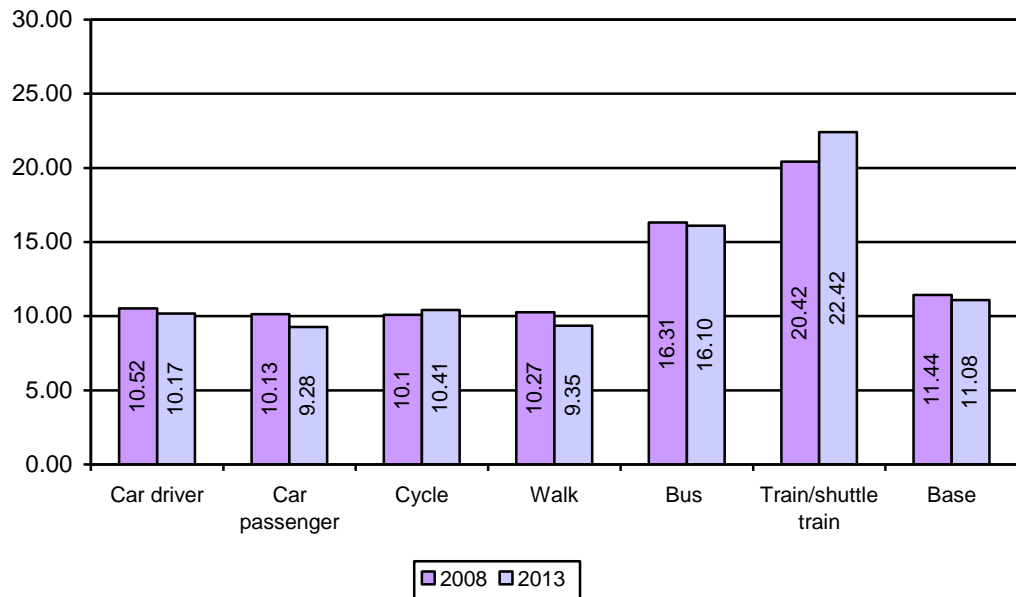
4.10.1 The average journey time to a station was 11 minutes: 08 seconds marginally lower than the 11 minutes and 44 seconds recorded in 2008.

- Commuters (10 min.47 sec) and shoppers (10 min.06 sec) had the shortest journeys time to station.
- Scholars (11 min.54 sec) and leisure users (12 min.03 sec) had slightly longer journey times. **See Appendix 18a.**

4.10.2 Mode of travel also has a significant impact on the time taken to travel to the station.

- Walkers (9 min.35 sec) and car passengers (9 min.28 sec) had the shortest length journey. Both types of journey were slightly shorter than 2008.
- Car drivers had an average journey of just over 10 minutes (10 min:17 sec). Slightly lower than the 10 min: 52 sec recorded in 2008.
- Those who had travelled to the station either by train (22 mins:42 secs) or bus (16 mins:10 secs) continued to have the longest travel time. Train journeys were over 2 minutes longer than 2008, while bus journeys were slightly shorter. **See Figure 32 and Appendix 18b.**

Figure 32 – Average Travel Time To Station By Mode Of Travel 2008/13 Compared

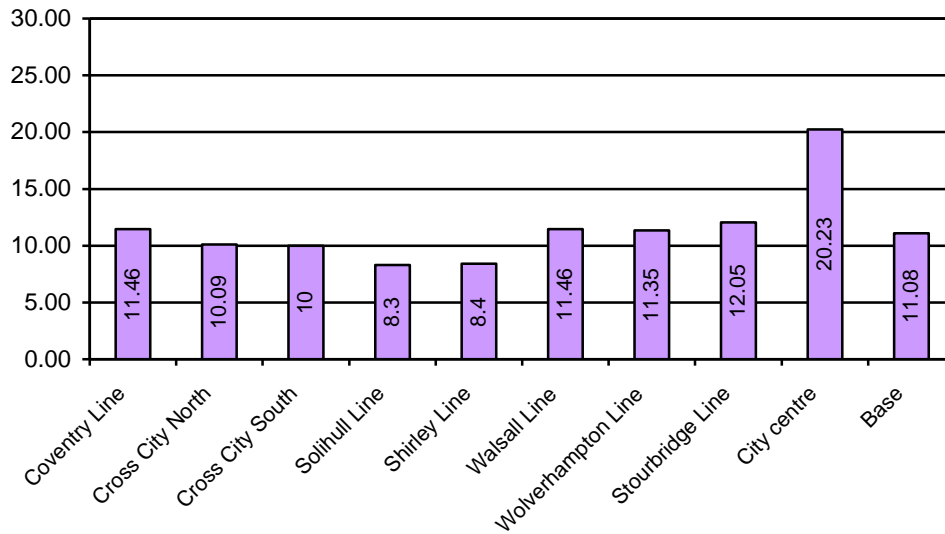


4.10.3

Travel time to station by line.

- It can be seen that users on the Solihull line (8 mins 30 secs) and Shirley line (8 minutes and 40 seconds) had shortest journeys time to the station. Those on the Cross City line also have a below average journey time.
- Stourbridge line users had some of the longest travel times (12 mins:5 seconds). Journeys on the Coventry and Walsall line were also above average (11 mins.46 secs) as were journeys on the Wolverhampton line (11 minutes: 35 seconds).
- Perhaps unsurprisingly users at City centre stations with the predominance of rail as a mode of travel, had the longest travel time of all (20 mins:23 secs). **See Figure 33.**

Figure 33 – Time Taken To Travel To The Station By Line



4.11 **JOURNEY ORIGIN TO BOARDING STATION**

4.11.1 **Appendices 19a to 19i** contain detailed maps that show the journey origin to each station. The following trends can be summarised.

- The majority of station use was from the local area.
- Park and Ride stations attracted users from further afield.
- Where park and ride stations were close to the edge of the Network West Midlands area use was increasingly attracted from outside the area.
- Stations in Birmingham City Centre, Wolverhampton, Coventry and Birmingham International attracted the widest spread of users.

4.12 **FINAL ALIGHTING STATION**

4.12.1 When leaving the train 68% of respondents were alighting at a Birmingham City centre stations (46%, New Street; 11% Snow Hill; 11% Moor Street). City centre travel predominated on all lines rising to 91% on the Shirley line dipping to 53% on the Stourbridge line

4.12.2 **Appendix 20** details all alighting stations by boarding stations, while **Table 7** summarises this data by line.

Table 7 – Final Alighting Stations By Line

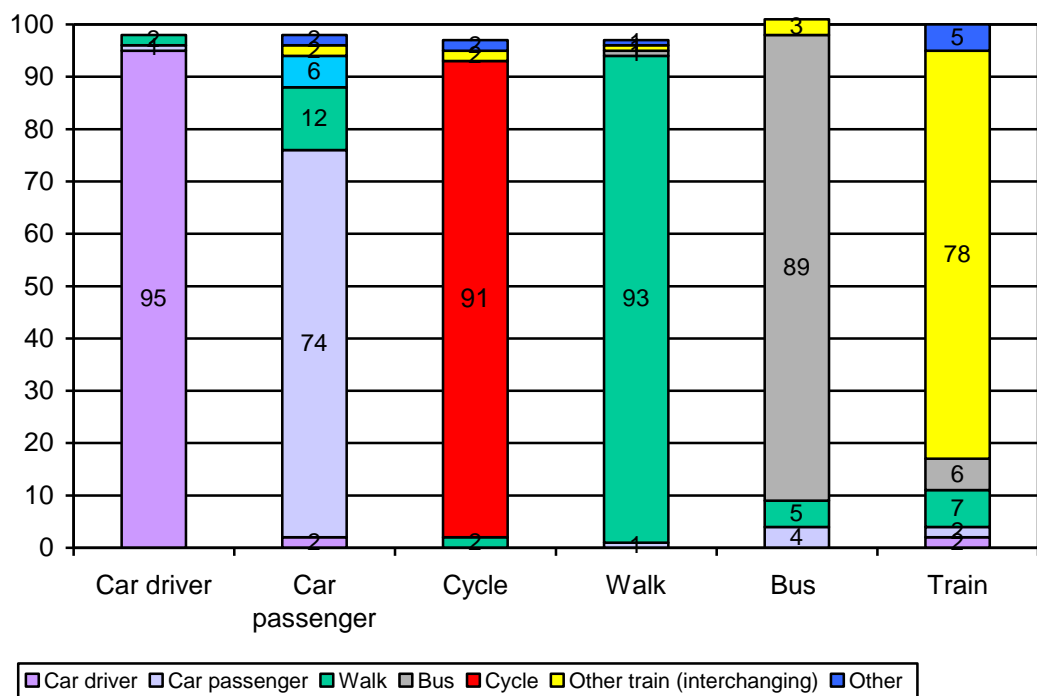
Coventry Line	75% City Centre; 9% Coventry; 7% Birmingham International;
Cross City North	65% City Centre; 10% University; 4% Sutton Coldfield
Cross City South	68% City Centre; 10% University; 6% Five Ways
Solihull	81% City Centre; 6% Solihull; 2% Jewellery Quarter
Shirley	91% City Centre; 2% Solihull
Walsall	78% City Centre; 5% Walsall; 3% Aston; 3% Wolverhampton
Wolverhampton	69% City Centre; 13% Wolverhampton; 3% Perry Barr
Stourbridge	53% City Centre; 5% Solihull; 4% Jewellery Quarter; 4% Jewellery Quarter;
City Centre	12% Solihull; 7% Stourbridge; 4% Wolverhampton/University/Perry Barr

4.13 MODE OF TRAVEL FROM STATION ON RETURN JOURNEY

4.13.1 Respondents were asked what mode they used to travel from the station they were interviewed at on their return journey.

- Overall the modal split differs only slightly to that used to make outward bound journeys with 89% of journeys being made by the same mode on the return.
- Car drivers (95%) and pedestrians were most likely to make outward and return journeys by same mode (93%).
- This figure dipped to 73% amongst car passengers, 12% of whom would walk on their return journey
- It also dipped to 89% amongst bus users - 5% of whom would walk on their return journey while a further 4% would get a lift. **See Appendix 21.**

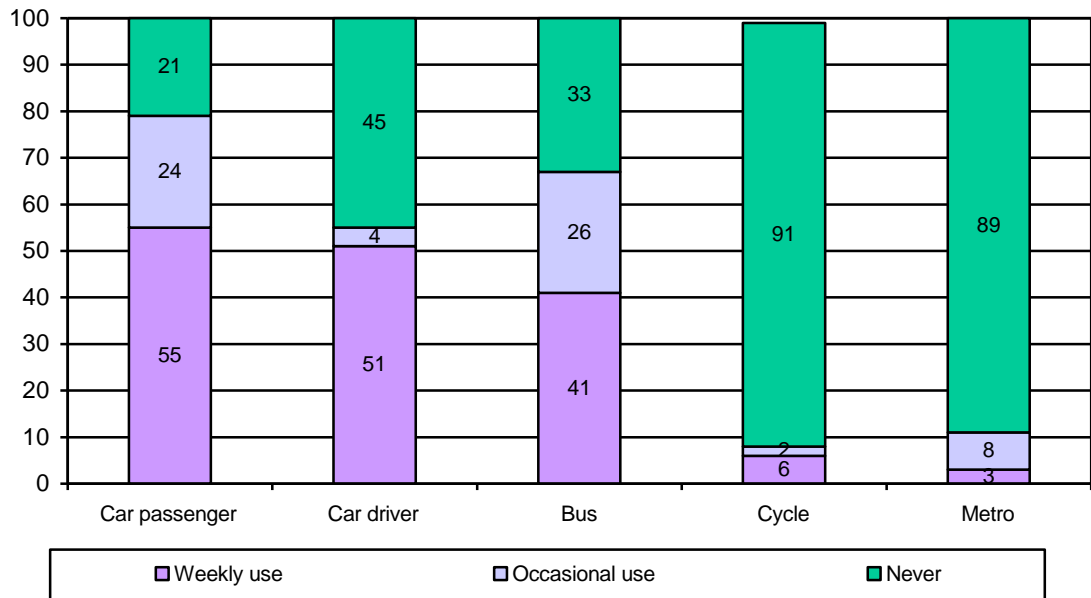
Figure 34 – Mode Of Travel To Station On Outward Journey By Mode Of Travel From Station On Return Trip



4.14 FREQUENCY OF TRAVEL BY OTHER MODES

4.14.1 Rail users were asked how frequently they travelled by other modes of transport. **See Figure 35.**

Figure 35 – Summary Of Travel By Other Modes Compared



4.14.2 As one would expect rail users travelled most regularly as a car passenger (55%, weekly) or a car driver (51%, weekly). 41% used the bus weekly. While only 6% cycled weekly Metro use was lowest at 3% weekly.

- Commuters were most likely to travel as a car driver (61% weekly), or a car passenger (56%, weekly). Fewer (28%) travelled by bus weekly, while only 6% cycled weekly.
- Scholars were most likely to travel regularly as a car passenger (68%) or by bus (54%). They were least likely to travel as a car driver (24% weekly), 5% cycled weekly.
- Shoppers were evenly split between weekly bus travel (52%), driving (50%) and travel as a passenger (51%). Only 1% cycled weekly.
- Leisure users also had a high level of bus use (49%) with an additional 49% driving weekly and 48% travelling weekly as a passenger. 6% cycled weekly. **See Appendix 22a to 22r.**

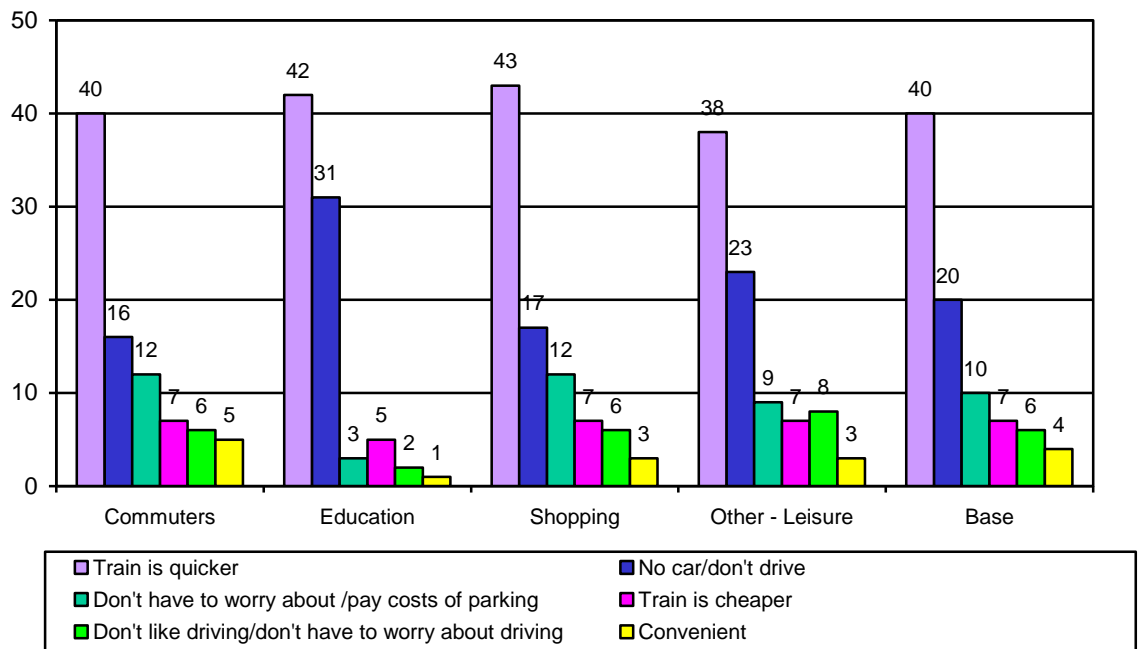
4.15 MAIN REASON FOR TRAVEL BY TRAIN

4.15.1 All rail users were asked to give the main reason why they travelled by train rather than any other method. Overall the main reason given at 40% was that *the train was quicker*. 20%

used the train as they *did not have a car/don't drive* while 10% stated *don't have to worry about/pay costs of parking*. 6% used the train as they *don't like driving/don't have to worry about driving*. **Appendix 23a to 23d.**

- *Train is quicker* was the main reason for travel amongst all groups of rail users.
- Scholars were more likely to say they use the train as they *have no car/don't drive* (31%). This also accounted for 23% of leisure users.
- Commuters and shoppers (12%) were more likely to travel by train as they *don't have to worry about/pay costs of parking*.
- Interestingly 7% of commuters, shoppers and leisure users preferred to travel by train as it was *cheaper*.

Figure 36 – Main Reason For Train Travel

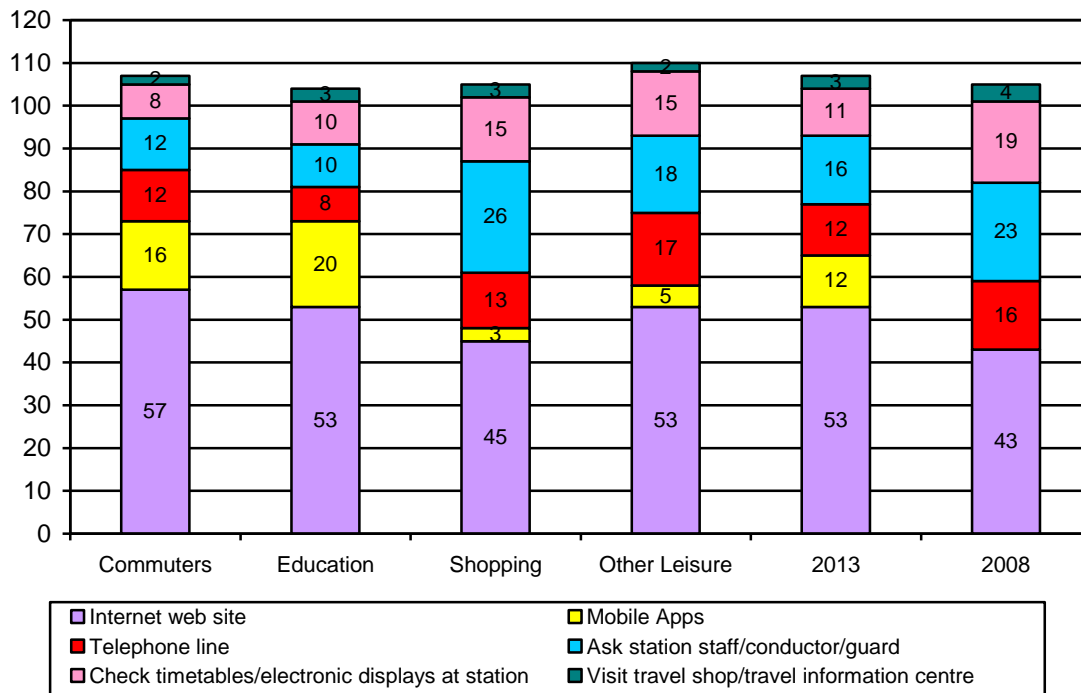


4.16 **SOURCE OF TRAIN INFORMATION**

4.16.1 Rail users were asked where they would obtain information about trains in the West Midlands. There was an increase in those using the internet (53%), with an additional 12% using mobile apps. The most commonly used website was National Rail Enquiries (20%), followed by London Midland (14%) and Network West Midlands (7%).

4.16.2 There was a dip in those using more traditional information sources such as asking at the station (16%, 2013; 23%, 2008) telephoning (12%, 2013; 16% 2008) and using timetables at the station (11% 2013; 19% 2008).

Figure 37 - Source Of Train Information By Journey Type
 (% exceed 100 due to multiple responses)



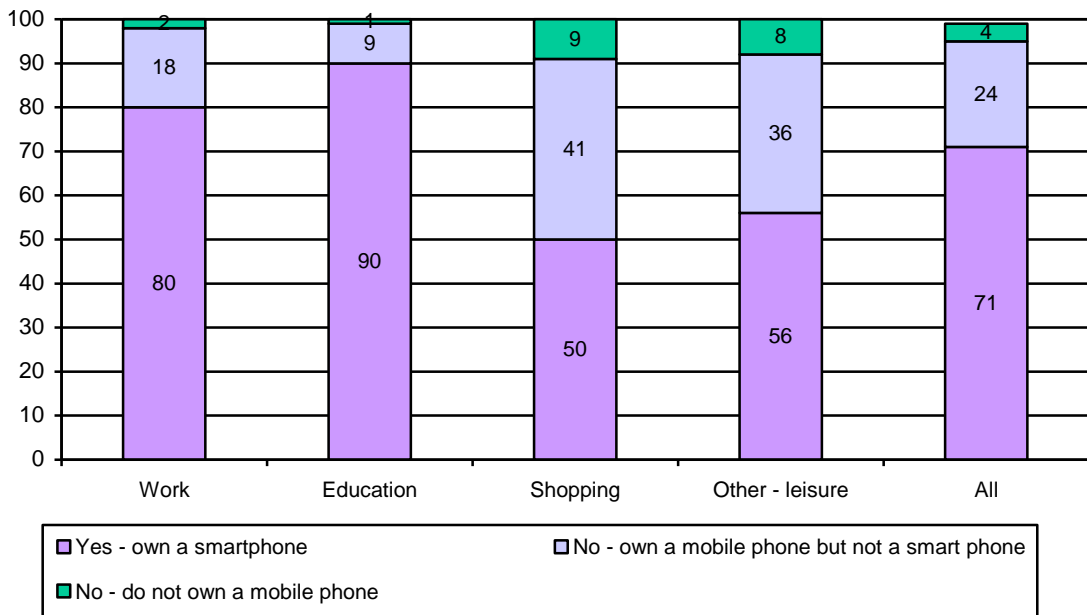
- Commuters were the biggest users of the Internet (57%), with an additional 16% using Mobile Apps.
- 53% of scholars would also use the internet, while this group was most likely to use Mobile Apps (20%).
- At 45% shoppers were least reliant on the Internet and most reliant on asking at station staff/conductor/guard (26%) or checking timetables/displays (15%). **See Appendix 24a and 24b.**

4.17 **USE OF SOCIAL MEDIA**

4.17.1 Rail users were asked about their access to and use of Social Media. 71% of rail users had a Smartphone, while 18% had access to a mobile (but not a Smartphone). Only 14% did not have a mobile phone. **See Figure 38 and Appendices 25a to 25c.**

- Scholars were most likely to have a Smartphone (90%), as did 80% of commuters.
- Smartphone ownership dipped to 50% amongst shoppers and 56% amongst leisure users.

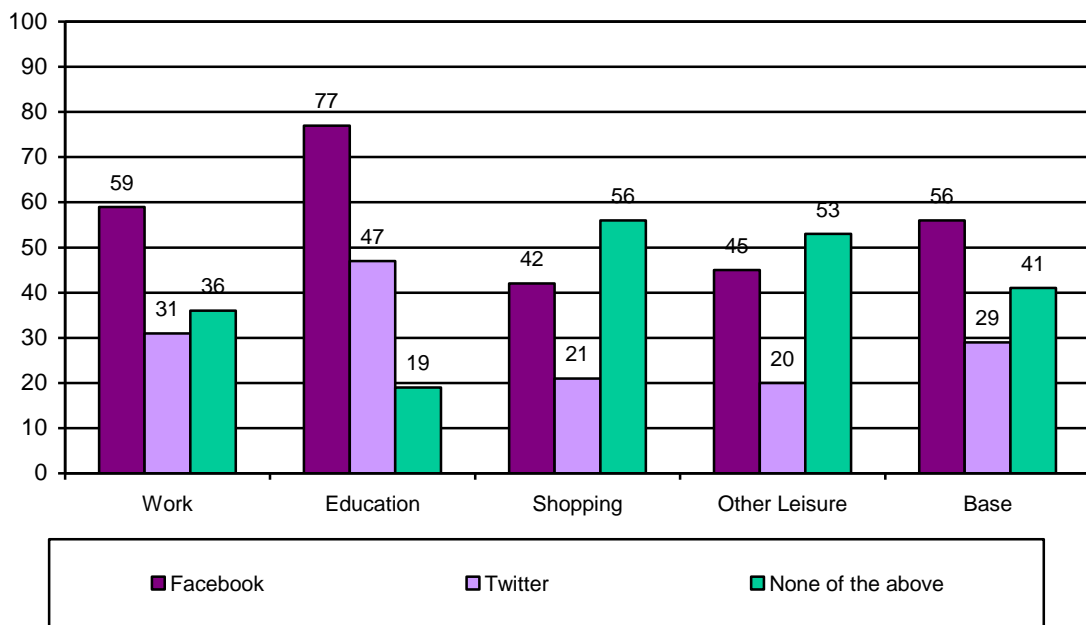
Figure 38 – Smartphone Ownership By Journey Type



4.17.2

Rail users were also asked about their use of social media. Facebook was the most widely used social media platform at 56%, while 29% used Twitter, interestingly 18% used both Twitter and Facebook. However 41% used neither Facebook or Twitter. See Figure 39.

Figure 39 – Social Media Use by Journey Type



- Scholars were the most likely group to use social media 76% used Facebook with a further 46% using Twitter – 43% used both Facebook and Twitter.
- 60% of commuters used Facebook and 31% Twitter, indeed 27% used both platforms. However over a third of commuters used neither form of social media.
- Shoppers (56%) and leisure users (53%) were most likely to state they used neither Twitter or Facebook. However 44% of shoppers used Facebook as did 44% of leisure users. **See Appendices 25c to 25f.**

5.0 **CONCLUSION**

- 5.1 The growing rail market in the West Midlands continues to be made up of users who are younger than the conurbation as a whole and more affluent with a high level of car ownership, they are also slightly more likely to be female. Although biased towards White users, there were signs of more ethnic minority use, especially amongst younger groups travelling for education.
- 5.2 Reasons for travel very much reflect the youthful and affluent profile of respondents. Weekday rail use was increasingly the remit of commuters, with scholars continuing to account for around a fifth of users. Around 1 in 10 travelled on a weekday for leisure however there was a decline in shopping trips; this was also noted on a Saturday, perhaps reflecting the difficulties that continue to be faced on the high street with the twin challenges of austerity and internet shopping.
- 5.3 Overall there was little change in frequency of rail use with commuters and scholars travelling most regularly. There however did seem to be a change in 'traditional' travel patterns with less travel on a Saturday and more on a Sunday, albeit Sunday travel remains relatively uncommon. There also continues to be seen more flexibility in travel times, with more respondents, especially commuters and scholars travelling at both peak and off peak times rather than purely during traditional 'peak' hours.
- 5.4 In terms of mode of travel to the station walking continued to be the most popular, followed by car – car driving was particularly popular at stations with park and ride facilities, showing the importance of this commodity to rail passengers who have high levels of car availability which they can utilise to travel to stations. There was an increase in travel to stations as a car passenger and a decrease in travel as a pedestrian and as a bus user.
- 5.5 When looking at car travel to stations in more detail it can be seen that the increase in car passengers had led to an increase in those being dropped off at the station, particularly amongst scholars and leisure users. There was a slight decrease in users parking on the station car park, while there was a reduction in the proportion of on street parking potentially alleviating some of the localised congestion this can cause.
- 5.6 The increase in travel as a car passenger and those being dropped off is interesting and could be due to lack of parking available to the later arriving scholars and leisure users and even to some extent commuters. However there is clearly a preference amongst rail users to access the station by car,

rather than bus or walking even if parking is not available at the station, indicating the challenges faced by station travel planners in encouraging more sustainable travel.

- 5.7 In terms of ticket type purchased there was an overall increase in the proportion using season tickets, this increase came mainly in the education market with little change in the commuter and leisure markets. Despite the increase in season ticket use significant proportion of commuters and scholars continue to use a cash fare despite regular travel, suggesting the commitment of a season tickets is not seen as an advantage to these groups who could potentially benefit from the introduction of a more flexible smartcard 'oyster' style ticket, which could be more useful to rail users considering there more flexible travel patterns.
- 5.8 There were significant changes in how rail users are buying their tickets, with a decrease in the use of the station ticket office and an increase in use of automatic ticket machines, direct debit and on train. Significant proportion of commuters and scholars additionally purchased their season tickets through place of work/education. Whether these changes are due to a reduction in station staffing, changes in regular peak travel where ticket offices are more likely to be manned or due to rail users embracing new ways to purchase tickets is unclear from this survey.
- 5.9 There was a increase in the proportion who used the internet to obtain rail information with an additional 1 in 10 using mobile apps, a source of information not available in 2008. Digital information was particularly popular amongst commuters and scholars. There was a dip in those using more traditional methods such as asking at the station, telephone or use a timetable, albeit these methods remained popular amongst shoppers and older rail users. Nearly three quarters of users had access to a Smartphone, this rose amongst scholars and commuters. Rail users were also keen users of social media with over half using Facebook and nearly a third Twitter – indicating the usefulness of social media to communicate with this market.
- 5.10 This survey has provided a useful up date of information on the local rail market. Although much of the profile of rail users has stayed the same in terms of the type of person using rail and their reasons for doing so, there has been significant changes in ticket types tendered, how tickets are purchased and in information sources used. Rail season ticket holder seem to be embracing direct debit and work/education travel schemes, while new forms of technology such as mobile apps have become a popular information source. The reliance amongst

some rail users to access rail by car continues to be evident, and as such any increase to Park and Ride capacity is bound to be a success. However it does show the challenges faced by any Station Travel Plan in convincing car reliant rail users to access rail by more sustainable methods such as bus and cycle without it acting as a barrier to rail use.