Great Western Electrification Extension Review Study

Passenger Survey

24/03/13

Prepared by

Pewsey Train Watch

&

Bedwyn Trains Passenger Group

Presented to

ARUP

Aims and Objectives

Scope of the survey

In order to support ARUP's Great Western Electrification Extension Review Study, Pewsey Train Watch and Bedwyn Trains Passenger Group have surveyed passengers who travel regularly from Kintbury, Hungerford, Bedwyn, Pewsey and Westbury stations.

This survey does not attempt to paint a complete picture of rail usage across the stations between Kintbury and Westbury but, rather, focuses on economic and passenger benefits and disbenefits associated with the electrification and 'Do Minimum' options under consideration.

Objective

To produce data compliant with WebTAG to support analysis of the economic and passenger benefits of an extension to electrification beyond Newbury.

Responses

The survey was hosted online and garnered just over 1,900 responses. 96% of respondents travel regularly from Kintbury, Hungerford, Bedwyn, Pewsey or Westbury with 94% travelling regularly eastbound beyond Newbury. A significant number of those responding run businesses based in the region.

The survey was anonymous. The survey was online for 5 days - this period was dictated by externally imposed time constraints. The survey would only allow one response per PC.

The survey was marketed via user group mailing lists, various media channels, BBC local radio and press and via social media/networks.

It's worth noting that local interest in this issue is so high that the Pewsey Train Watch website crashed under the weight of hits and we had to move to a larger server within a few hours of opening the survey.

Within the text Q1, Q3, Q7 etc refer to question numbers within the survey, full results of which can be found at the end of this document.

A Brief Summary of Main Conclusions

Standard measurements understate passenger numbers between Kintbury and Westbury.

- Evidence suggests official ORR figures underestimates the passenger numbers for both Kintbury and Bedwyn by up to 38% affecting the combined passenger count between Kintbury and Westbury. *See section 2*

Standard guidance is likely to misrepresent certain data between Newbury and Westbury.

- Significantly, the survey offers up numbers that suggest particular attention should be paid to the ratio of 'business' v 'commuter' use along this stretch of line, given that WebTAG values business use significantly higher than commuter or leisure use. *Q7/11 See also: 'A high proportion of passenger journeys are made for work.' section.*

The 'do-minimum' option could lead to dramatic reductions in passenger numbers.

- 30% of passengers surveyed said they would "definitely" stop using the service if they had to change trains at Newbury. A further 58% said they would "maybe" stop using the service. *Q26/27*
- From experience, there is little confidence amongst passengers that a change at Newbury will be efficient. *Q24*

The do-minimum option is likely to lead to significant reductions in transport user benefits.

- A large proportion of respondents (46%) told us that they generally use the train to travel on business.
- 65% of respondents told us they would consider moving house if the service significantly deteriorated, providing further evidence of the value passengers put on direct services to London.
- A significant proportion of passengers on this line work while travelling (laptop etc). 48% of respondents "often" work on the train while 37% "sometimes" work on the train. This productivity would be lost if passengers were required to change at Newbury or shifted to driving instead under the do-minimum option.
- Across passengers surveyed the average yearly wage was £72,000. 22% earn over £90,000.

The economic benefits to the region of an extension to electrification.

- 73% of respondents categorising themselves as 'employed' use the train predominantly for work against 27% using the train for leisure. *Q7*
- Of the above, 65% are business users while 35% are commuters. *Q11*
- Across passengers surveyed the average yearly wage was £72,000 with 22% earning over £90,000. *Q14* This compares to the Wiltshire Workplace Gross Annual Pay of under £25,000. *Source: Wiltshire Strategic Economic Partnership.* This will be a significant factor in the economic modelling and how it takes into account the benefit of the trains to the wider local economy (beyond the train users) as studies suggest as much as 80% of income is spent within 20 miles of home.
- 94% of respondents who moved into the region were influenced by the rail links with 68% citing good rail links as "very" important to their decision to move into the area. *Q21* Again, compared to the Wiltshire Workplace Gross Annual Average these are relatively high worth individuals who contribute disproportionately to local economies.
- 65% of respondents individuals would consider moving out of the region if the rail service significantly deteriorated. *Q22*
- 48% of business owning respondents located their businesses in the region "very much" because of the trains. A further 25% cited the trains as "partially' responsible for their decision to locate their business in the region. *Q18*
- 83% of unemployed people considered good rail links "very" important to their search for work. *Q5*
- The above clearly indicates that trains bring a disproportionate amount of wealth into the local economies by attracting high worth individuals and business and facilitating higher levels of employment.

The economic disbenefits of the 'do-minimum' option.

- 94% of passengers travel to Reading and beyond. This is the percentage of passenger that would be affected by a change at Newbury. *Q2*
- 65% of residents would consider relocation if rail services deteriorated. *Q22*
- 74% of business respondents would consider relocating their business if rail services deteriorated. *Q19*
- This exodus is unlikely to be offset by 'replenishment' given the figures quoted above for residents and businesses citing rail links as a major factor when locating to a region.
- 81% of respondents said their business/place of work would "definitely" suffer if rail services got worse. *Q16*
- An overwhelming proportion of passengers potentially abandoning the rail service have indicated they would take to their cars, causing significant impact upon stations other than those directly along the electrification extension route. This has implications for CO2 emissions, additional road congestion on already congested routes and necessitates the need to build extra car parking capacity at key locations. *Q23*

Key Points In Detail

The following does not exhaustively examine all the data nor every conclusion that might be drawn from the survey. Here we will expand upon selected data that is of particular interest and look at likely conclusions. The full results of the survey are published at the end of this document to facilitate independent analysis.

Passenger Numbers.

There is credible evidence that current ORR passenger numbers estimates derived from ticket sales are too low, and by as much as 38% for certain stations. Figures shown below make adjustments for under counting of passenger numbers at both Kintbury and Bedwyn by using Wiltshire Council's 'day count' numbers referenced against stations with barriers and/or ticket machines/ticket offices where ticket sales accurately reflect passenger numbers. Under counting is due to no barriers and/or ticket machines/ticket offices at both stations and is further exacerbated by the fact that neither is a penalty fare station.

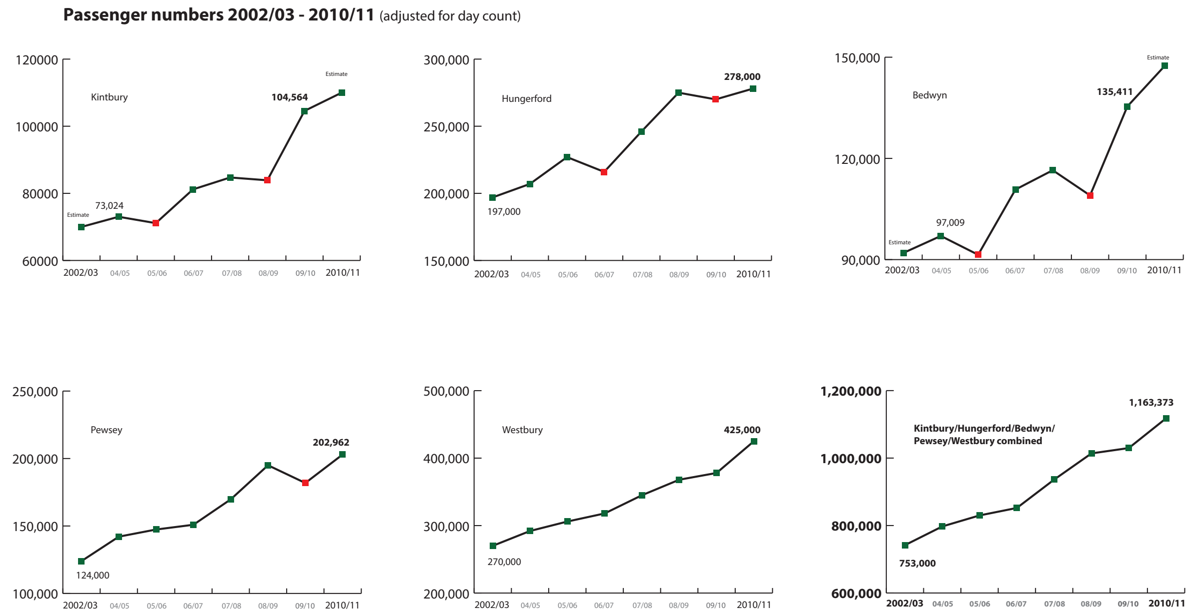
Anecdotally, trains from Bedwyn station are referred to locally as 'the free service'.

Year	ORR Pewsey Annual	ORR Bedwyn Annual	Wilts Council One Day Count Bedwyn	Wilts Council One Day Count Pewsey	Estimated Actual Bedwyn Annual	Estimated Bedwyn Undercount	% Undercount	ORR Kintbury	Estimated Actual Kintbury Annual
2004/05	142084	78439	297	435	97009.08	18570.08	19.143	59191	73204.2
2005/06	147390	74773	250	403	91433	16660	18.221	58164	71123.39
2006/07	150911	77048	309	421	110763.66	33715.66	30.439	56467	81176.56
2007/08	169733	81160	326	475	116490.44	35330.44	30.329	59031	84728.28
2008/09	178992	83718	307	504	109028.86	25310.86	23.215	64418	83893.8
2009/10	181872	83492	341	458	135411.25	51919.25	38.342	64472	104563.72
2010/11	202962	94584	336						

Notes:
The ORR figures for Pewsey will be fairly accurate as it is based on ticket sales and there is a manned ticket office and a ticket machine
The ORR figures for Bedwyn are inaccurate as it is based on ticket sales and there is a no ticket office and no ticket machine
The 'Estimated Actual Bedwyn Annual' figure is calculated by dividing Wiltshire Council's Bedwyn figure by their Pewsey figure and multiplying it by the ORR figure

Note: For clarity, although Westbury station offers a choice of destinations it is reasonably assumed that all respondents to the survey are travelling east through the proposed electrification extension area.

The ‘Do-Something’ Options and Increases In Passenger Numbers.



For larger version see end of document

The stations serving the communities of Kintbury, Hungerford, Bedwyn, Pewsey and Westbury have seen increasing passenger numbers over the period 2002/03 to 2010/11. Combined figures for the five stations show a 7% year on year increase for the period.

Our survey provides some evidence for the argument that these increases would accelerate in the event of an extension to electrification in response to the attendant improvements in service this would bring. Over 78% of survey respondents said they would “definitely” use the service more if it were more frequent and more reliable. A further 19% answered “maybe”. *Q24*

Further, 72% said better rail connections to the west would "definitely" improve services and 75% said an additional 'late' service out of Paddington would "definitely" improve services. *Q28/29* These figures, allied to the established fact that improved services lead to more usage, suggest constrained demand.

Taking a broader view, over 85% of respondents rated the current service as no better than “good” or “adequate” (predominately “adequate” with a 35 to 45% split) while twice as many rated the service as “poor”, at 13%, as did “excellent”. These figures further bolster the suggestion of constrained potential awaiting improved services. *Q30*

The ‘Do-Minimum’ Option and Reductions In Passenger Numbers.

Conversely, should the service deteriorate as a result of passengers having to change at Newbury under the do-minimum option, 30% of passengers surveyed would “definitely” stop using the service and a further 58% would “maybe” stop using the service. *Q26/27*

Further validating this result, when asked how much compensation passengers would expect for the inconvenience of changing at Newbury 36% answered “No compensation would be enough, I’d stop using the service.” *Q27* The correlation between these results along with other data strongly suggest the possibility of a significant abandonment of rail in favour of road.

The do-minimum option will further reduce passenger numbers due to an exodus of both high worth individuals and business. The implication of this is possible stagnation or even decline of local economies with 65% of respondents considering relocation if rail services deteriorated and 74% of businesses considering relocation. This drains wealth and employment opportunities from the region. This exodus is unlikely to be offset by 'replenishment' given that 68% of residents responding cited good rail links as "very" important to the decision to locate in the region and 51% of businesses also cited good rail links as a major consideration when choosing to locate to the region.

A high proportion of passenger journeys are made for work.

Particular attention should be paid to the high ratio of business users v commuters indicated in the survey when it comes to the economic modelling as, given the premium placed on business use in WebTAG guidance, this will contribute significantly towards the BCR.

Over all use is biased heavily towards business with a 73/27% split and, of the 73% business users, passengers travelling 'on business' make up 65% of traffic against 35% for commuters. *Q7/11*

Contrast the above figures with the standard guidance cross heavy rail where the average percentages of passenger trips made for work, commuting and other are 7.6%, 52.2% and 40.3% respectively (*Source: WebTAG Unit 3.5.6*) and the significance of considering the datas generated by the survey become apparent.

We think it worth noting that the results for this very important metric generated by the survey can reasonably be considered as wholly credible given that it's unlikely that any respondent would have known the significance of this question so there can be no bias in the voting.

Productivity While Travelling.

48% of respondents told us they “often” work on the train (laptop etc). A further 37% told us they “sometimes” work on the train. 48% described the opportunity to work on the train as “very” important. This figure, in particular, suggests that this is not 'casual' work and that the opportunity to be productive while travelling is likely to be factored into the working day for many.

This is important because under the do-minimum option much of this currently productive time is likely to be converted into non productive time. As outlined in the previous section, a large percentage of our passengers told us they would definitely stop using the service, with many switching to car use for all or part of their journey. For these respondents, productivity while in transit drops to zero. For those continuing to travel by rail, changing at Newbury would very significantly disrupt their opportunity to work whilst in transit. Hence, the do-minimum option has implications for the productivity of the individual. This, in itself, could be enough to sway the hand of many when it comes to considering the viability of continuing to travel to work or on business from their current location. Those considering moving to the region may also factor this into their decision.

This takes on more significance when the average annual wage across passengers surveyed is £72,000 (with 22% earning over £90,000) as this drop in productivity will affect 'high worth' individuals who contribute disproportionately to local economies.

The Value Placed On Direct Services.

In an attempt to gauge how people value their time we asked what compensation would be expected if a change at Newbury were introduced under the do-minimum option. While 28% answered "over £10" the more interesting result from this question was the 36% of respondents who answered "No compensation would be enough, I'd stop using the service". The fact that for 36% of respondents no amount of financial inducement would persuade them to use anything other than a 'through' service is further strong evidence of the likelihood of abandonment of rail services in the event that the do-minimum option necessitates a change at Newbury.

The Do-Minimum Option Could Lead To Significant Declines In Local Incomes.

Our survey suggests that good rail links help boost incomes in the communities served by Kintbury, Hungerford, Bedwyn, Pewsey and Westbury stations.

The Wiltshire Workplace Gross Annual Pay is just under £25,000. *Source: Wiltshire Strategic Economic Partnership.* This is in sharp contrast the average annual wage of £72,000 across passengers surveyed. 22% of respondents earn over £90,000. Given that some studies suggest as much as 80% of income is spent within 20 miles of home, rail users contribute disproportionately to local economies, supporting local business and services. (This takes on extra significance when the fact that the average wage across Wiltshire is below the national average is taken into account).

No doubt much of this average wage disparity is accounted for by the fact that 94% of passengers travel to Reading and beyond (87% to Paddington and beyond) and reap the benefits of access to higher paying jobs that good rail links allow. This overwhelming figure for Reading and beyond is corroborated by a previous study conducted by Bedwyn Trains Passenger Group and Transition Marlborough that found 85.5% of passengers were travelling beyond Newbury.

Under the Do-Minimum option, large numbers of these relatively affluent residents may leave the region. 64% of respondents told us they would consider moving house if the service deteriorated significantly. This could lead directly and indirectly to significant declines in local incomes.

Good Rail Links Boost Local Employment.

Respondents to our survey included many who represent local businesses. Even allowing for survey bias towards those who travel regularly, the proportion who told us train services were important for their business was very high. 48% of local businesses who responded to our survey said the current rail service was an important factor in their locating to the region. Up to 75% of businesses who responded to our survey said they would move away from the region if services became significantly worse because of a change at Newbury. 73% responded that good rail links "definitely" benefit their business/place of work and an overwhelming 81% expressed the concern that their business/place of work would suffer if rail services were to get worse.

For those seeking work, the trains are equally important with 83% stating that good rail links were "very" important to their search for employment and 73% stating that more frequent and reliable services would increase their employment opportunities "a lot".

From this it is clear that good rail links are fundamental to employment opportunities both within *and* without the region, attracting and sustaining employment and empowering the workforce.

The Impact Of The Do-Minimum Option On Other Areas.

Beyond the areas served by the stations directly on the route of the electrification extension, there are likely to be significant impacts upon other areas.

Our survey found strong evidence that under the do-minimum option, a significant proportion of passengers would switch to car use for all or part of their journey. The most likely destinations for passengers abandoning the trains and taking to the roads are Newbury, Swindon, Andover and Whitchurch. This would have major knock-on costs in terms of greater congestion, more strain on existing car parking facilities and additional CO2 emissions. The scale of these are beyond the scope of this survey. However, taking Newbury as an example we have examined one of the consequences of a large proportion of rail travellers taking to the road, namely parking…

It is reasonable to assume that displaced passengers from Kintbury and Bedwyn along with half the passengers from Pewsey would make Newbury their station of choice to avoid the need to change trains. Using adjusted passenger numbers (see table above) and data from the survey pointing toward both rail abandonment and car use substitution, it is estimated that Newbury will have to accommodate and extra 605 cars a day. Obviously that will require the construction of appropriate parking provision and an estimated cost for this is £14.5 million.

(*Source: http://www.building.co.uk/Journals/Builder_Group/Building/2007_issue_48/attachments/costmodel.pdf*)

This, of course, takes no account of the extra strain on Newbury's road network which is already severely congested at peak times. And peak times are certain to be when a large proportion of these extra vehicles arrive on Newbury's roads.

In addition to an enormous amount of extra CO2 potentially generated across the regions due to increased car usage, the do-minimum option would also leave diesel trains running on the line which has its own CO2 implications in contrast to the ‘zero emissions at point of use’ generated by an electric fleet.

Conversely, greater train use will take cars off the road. This will lead to a significant reduction in CO2 over and above the 46 Tonnes of CO2/week saved by switching to electric trains, a number which, itself, will rise to 67 Tonnes/week by 2022 as UK power generation mix moves away from coal. *Source: Transition Marlborough*

A Word About Option 4…

As mentioned in the introduction, mainly due to externally imposed time constraints our survey does not attempt to paint a complete picture of rail use throughout the region and, as such, we have deliberately concentrated on usage east from stations between Kintbury and Westbury that will be affected by both economic and passenger disruption should electrification terminate at Newbury and the economic and passenger dividend for these areas should electrification be extended as far as Westbury. However, in many ways 'Option 4' being considered by the DfT is the most exciting option of all, opening up, as it does, many regions to the north and west of Westbury in addition to all the benefits derived from better links eastward. This option would offer an enormous opportunity for employment to flow both in and out of the communities between Newbury and Westbury, as well as the obvious increase in passengers travelling for tourism and leisure both in and out of the region. Additionally, the attraction of efficient access to Bath and Bristol cannot be overstated. With this in mind, we included one question that attempts to gauge demand westward…

Clearly there is an enormous amount of constrained demand for better services to the west within the communities served by Kintbury, Hungerford, Bedwyn, Pewsey and Westbury stations with over 72% of respondents answering that better rail connections to the west would "definitely" improve rail services. A further 21% answered that better rail connections to the west would "moderately" improve rail services while only 6% answered "not at all". *Q29*

There seems to be little doubt that option 4 offers the biggest reward in terms of benefits, economic and passenger, both within *and* without the region and that considerable constrained demand for improved services to the west of Westbury exists.

Case Studies

Numerous local business stepped forward to express their concern at the possibility of a diminished rail service in the event of electrification terminating at Newbury. Below are two case studies that illustrate why good rail services are fundamental to businesses based in the region and, hence, the wider economy as a whole.

TIN HORSE

Tin Horse, Marlborough

"Really big dreams for everyday things." quotes Tin Horse's website. This small but hugely successful UK company has transformed paint tins, oil cans, pots of moisturiser and shampoo bottles to become everyday objects which stand out from the crowd.

The structural packaging design house was formed in 1990 and is owned by its three directors, Martin Bunce, Peter Booth and John Lamb. Based in Marlborough, Wiltshire, the 14-strong company is outside of the capital but, nonetheless, pulling in big name clients. Tin Horse's portfolio sports packaging work for Unilever, BP, ICI Paints and Kraft Foods. "We quite like to describe ourselves as Warriors Against Mediocrity!"

The company's fight against mediocrity has been recognised by countless awards, including a Starpack Silver Star Award for Business of the Year 2006, one of the big awards in the packaging world, and a Good Housekeeping Award for Product Innovation for their user-friendly paint pot for Dulux, the EasyCan. "Our holy grail is not the awards." says Bunce. "Achieving something of meaning and value to the person for whom our designs are intended is where we gain the glow of satisfaction. Winning the Good Housekeeping Award was brilliant, voted for by the women for whom we'd set out to make decorating easier."

An attractive range of new jars and dispensers for the Pond's skincare range are on store shelves right now. Also in the skincare line is the recent work on the Clearasil product range.

Tin Horse works either as a sole company or in tandem with other design or branding agencies, depending on the scale of the job. Around 60 per cent of Tin Horse's current work is for international clients, with 40 per cent of that from outside Europe.

Martin Bunce spoke to Pewsey Train Watch about what good rail links mean to Tin Horse…

"As a director of Tin Horse, a business based in Marlborough, I am deeply concerned about the quality of our rail services. Whilst the arguments for frequent and reliable links are diverse and overwhelming, it is the threat to my personal livelihood from diminished services that I find most alarming!

"Tin Horse is an internationally renowned specialist Design Consultancy, attracting clients from all over the world. We relocated to Marlborough from London (having first considered Bristol) on the strength of the excellent communication links, particularly to London and Heathrow, along with access to the rest of the UK.

"Our business relies on the train services available from Bedwyn and Pewsey, on a daily basis, to shuttle a combination of our global clients, our own staff, and key freelance resources to and from London. Anything that adversely affects these train services will be devastating to our business and may force us to reconsider our location to remain both competitive and sustainable.

"I find it difficult to imagine that every business in Marlborough, Pewsey and the surrounding area will not be seriously disadvantaged if these services are not improved, let alone the negative effects of premature termination of electrification.

"I vociferously support this campaign to protect a vital communication link for our community."

Martin Bunce
Tin Horse

The Atlantic Screen Group, Pewsey

Hollywood comes to Pewsey...

2 years ago Veteran Music Publisher and Wilcot resident Tim Hollier and his business partner, Simon Fawcett, raised several million pounds under the HMRC 'Enterprise Investment Scheme' to create and produce the music for major films and television series. The group of companies are known as The Atlantic Screen Group. As Simon works mainly in Los Angeles, they decided to open up their office in the Old School in Pewsey High Street, rather than in London.

At first Tim worked on his own, but over the last two years the staff has grown to five and Tim will be actively recruiting more staff during 2013 as they also process music publishing royalties for such companies as Ealing Films and composers such as Barry Mason, who wrote hits such as Delilah and The Last Waltz.

Marlborough resident Tania Orchard heads up the staff, and her husband, Steve Orchard, founder of Classic FM and the owner of the midlands Touch Radio network, has joined Simon and Tim as Chairman.

In the last year Tim and his team have produced the music for some very major films and TV series, including 'Great Expectations' released in some 350 cinemas and the major release 'Dredd 3D'. In October 2012, 'Dredd' became the UK's number one box office film, and in December and January Hollywood productions such as 'Broken City' starring Mark Wahlberg and Russell Crowe,'Ten' starring Arnold Schwarzenegger, and 'The Host' starring Dianne Kruger and Jake Abel were released.

In all Atlantic Screen has invested in and financed over 40 major film scores, and following a further £4 million fund raise they will be creating a similar number over 2013 and 2014.

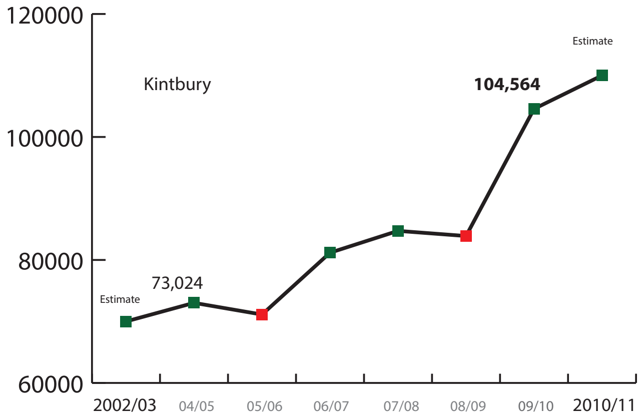
Tim Hollier spoke to Pewsey Train Watch about what good rail links mean to Atlantic Screen…

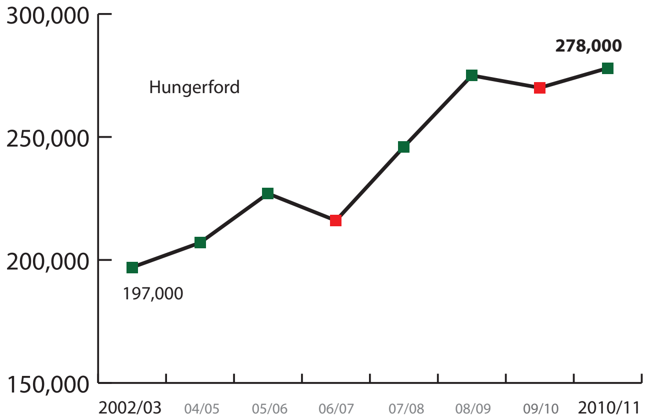
"The ease with which clients can come to Pewsey, sometimes just for lunch, thanks to the 11.06 from Paddington has been a great bonus, as is the ability to go to London and return during the working day. If, however, things change, I may have to rethink and, indeed, re-locate back to London.

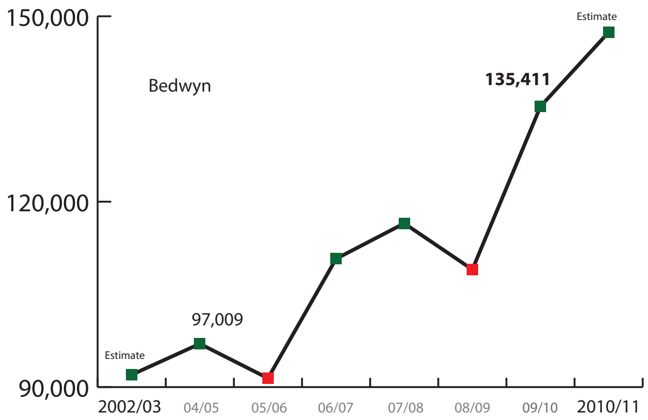
"The training of staff in Pewsey and the further planned recruitment will continue for the moment though, perhaps, with a slightly more cautious outlook. I am, though, confident in the PTW team's efforts to make the voice of local communities and businesses heard."

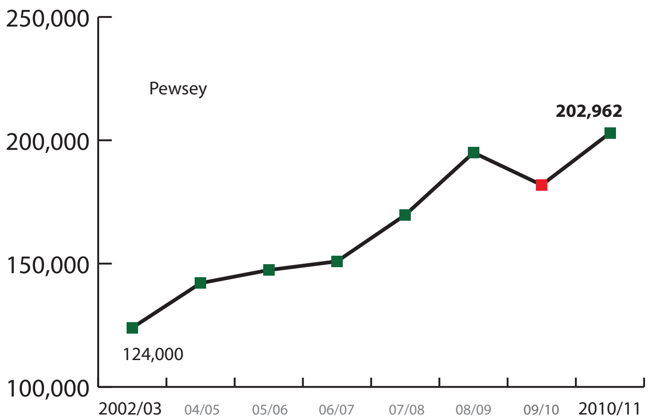
Tim Hollier
The Atlantic Screen Group

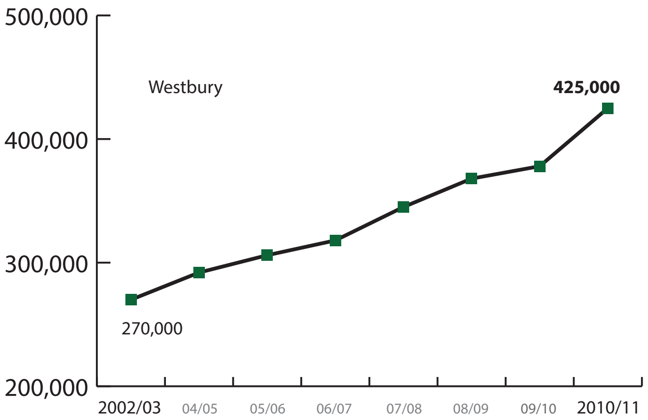
Passenger numbers 2002/03 - 2010/11 (adjusted for day count)

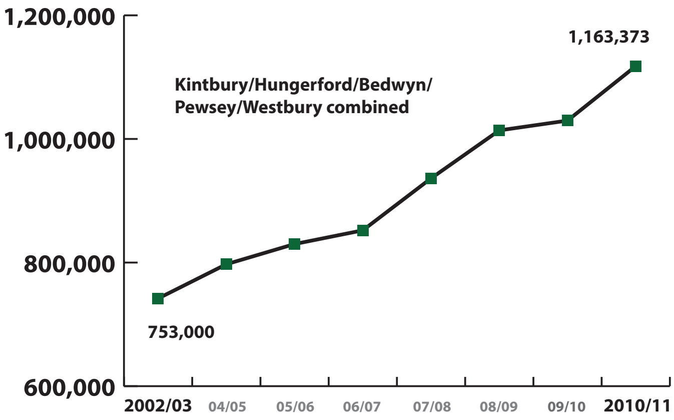












Results for: Great Western Line Electrification Proposals

Newbury to Westbury Rail Electrification - Passenger Survey

The Department for Transport are currently evaluating the economic case for extending planned Great Western Line electrification beyond the currently proposed cut-off point of Newbury. Various options are being considered which cover the stations at Kintbury, Hungerford, Bedwyn, Pewsey and Westbury. Electrification will lead to improved rail services.

There is a small window of opportunity to contribute to the evaluation process. This survey attempts to put a value on what the trains contribute to local economies served by Kintbury, Hungerford, Bedwyn, Pewsey and Westbury stations. Please take this opportunity to help ensure your county gets the rail services it deserves by completing the survey. Please tell others who are also affected by this issue about this survey.

Closing date for survey Sunday 24th.

Note, all submissions are anonymous and we do not store or hold any personal information related to individual respondents.

For further information please visit…http://pewseytrainwatch.co.uk/events.html

1) What station do you usually travel from?

	Response (%)	Responses
Westbury	15.87	302
Pewsey	43.88	835
Bedwyn	20.86	397
Hungerford	10.77	205
Kintbury	4.26	81
Newbury	2.47	47
Reading	0.32	6
Paddington	1.58	30
	Answered Question	1903

Skipped Question	3

2) What station do you usually travel to?

	Response (%)	Responses
Paddington or beyond	87.38	1655
Reading or beyond (excluding Paddington)	6.60	125
Westbury or beyond	2.06	39
Pewsey/Bedwyn/Hungerford/Kintbury	1.64	31
Newbury	2.01	38
Newbury Racecourse/Thatcham/Midgham/Aldermaston/Theale/Reading West	0.32	6
	Answered Question	1894
	Skipped Question	12

3) What type of ticket do you travel on?

	Response (%)	Responses
Day single	5.81	110
Day return	71.59	1356
1 week ticket	6.92	131
2 weekly ticket	0.42	8
Monthly ticket	6.86	130
6 monthly ticket	0.37	7
Annual ticket	8.03	152
	Answered Question	1894

Skipped Question	12

4) What is your work status?

	Response (%)	Responses
Student/Child	2.06	39
Employed	71.41	1351
Unemployed/seeking work	3.96	75
Retired	22.57	427
	Answered Question	1892
	Skipped Question	14

5) If seeking work, how important are good rail services to your search for employment?

	Response (%)	Responses
Very	83.10	787
Moderately	9.29	88
Not at all	7.60	72
	Answered Question	947
	Skipped Question	959

6) Would a more reliable, more frequent rail service increase your employment opportunities?

	Response (%)	Responses
A lot	72.77	842
Moderately	18.58	215
Not a lot	8.64	100
	Answered Question	1157

	Skipped Question	749

7) If employed, do you use the trains predominantly for...

	Response (%)	Responses
Leisure	26.94	395
Business	73.06	1071
	Answered Question	1466
	Skipped Question	440

Other
Shopping ,banks ,building society ,eating out,cinema
Both
Business and Leisure
Other
day trips
travel to work
Political mtgs.
Visiting family in London
University
Journey to Work

8) How often do you travel on the train for leisure?

	Response (%)	Responses
Never	2.01	38

Once a year	2.17	41
Twice a year	24.76	467
Once a month	55.04	1038
Once a week	12.09	228
More than once a week	3.92	74
	Answered Question	1886
	Skipped Question	20

9) If you travel into Wiltshire/Berkshire by train for leisure/other, how much do you spend while on a single visit (excluding travel)?

	Response (%)	Responses
£30 - £50	32.37	359
£50 - £100	39.04	433
£100 - £200	21.82	242
£200 - £500	5.77	64
£500 - £1,000	0.99	11
	Answered Question	1109
	Skipped Question	797

Other
We live in the County
I live here and so spend here all the time - I use the line to get elsewhere
n/a
As I have a season ticket I do not spend extra
Travel to meet up with friends primarily, spending varies
VARIES
0-10

n/a
I live in Wiltshire!
n/a

10) How often do you travel on the train for business/work?

	Response (%)	Responses
Never	21.16	353
Once a month	28.42	474
Once a week	16.07	268
2 days a week	8.75	146
3 days a week	8.15	136
4 days a week	4.80	80
5 days a week	12.65	211
	Answered Question	1668
	Skipped Question	238

Other
business travel is erratic, sometimes it is 5 days a week for months, others just once a week
Occasional
Once every three months
Leisure at weekends
about 3 times a year on external examining business
twice a year
Pleasure
4 times a year

twice a month
I stay in London when I am not abroad for 3 days ie2 or 3 nights

11) Do you travel 'on business' or to your place of work?

	Response (%)	Responses
On business	64.41	883
To my place of work	35.59	488
	Answered Question	1371
	Skipped Question	535

12) Do you work while on the train (laptop etc)?

	Response (%)	Responses
Often	47.92	770
Sometimes	37.46	602
Never	14.62	235
	Answered Question	1607
	Skipped Question	299

13) How important is it for you to be able to work on the train?

	Response (%)	Responses
Very	47.51	754
Moderately	36.29	576
Not very important	16.19	257
	Answered Question	1587

	Skipped Question	319

14) How much do you earn annually?

	Response (%)	Responses
£20,000 - £40,000	39.43	604
£40,000 - £60,000	22.65	347
£60,000 - £90,000	15.93	244
£90,000 - £120,000	9.20	141
£120,000 - £150,000	5.48	84
£150,000 - £200,000	2.87	44
£200,000 - £250,000	1.57	24
£250,000 - £500,000	2.28	35
Over £500,000	0.59	9
	Answered Question	1532
	Skipped Question	374

15) Does your business/place of work benefit from good rail links?

	Response (%)	Responses
Definitely	72.50	1102
Moderately	20.59	313
Not at all	6.91	105
	Answered Question	1520
	Skipped Question	386

16) Would your business/place of work suffer if rail services got worse?

	Response (%)	Responses
Definitely	80.87	1230
Moderately	14.60	222
Not at all	4.54	69
	Answered Question	1521
	Skipped Question	385

17) Would your business/place of work benefit if rail services got better?

	Response (%)	Responses
Definitely	78.22	1185
Moderately	17.76	269
Not at all	4.03	61
	Answered Question	1515
	Skipped Question	391

18) If you own a busines, did you locate near Kintbury, Hungerford, Bedwyn, Pewsey or Westbury because of the rail links?

	Response (%)	Responses
Very much so	24.20	319
Partially	12.59	166
To a small degree	3.95	52
No	9.79	129
Not a business owner	49.47	652
	Answered Question	1318

Skipped Question	588

19) Would you relocate your business if rail links became significantly worse?

	Response (%)	Responses
Defintely	12.46	168
Maybe	27.89	376
No	14.17	191
Not a business owner	45.47	613
	Answered Question	1348
	Skipped Question	558

20) How many people does your business/place of work employ?

	Response (%)	Responses
1-5	45.76	470
5-20	19.47	200
20-50	12.66	130
50-100	22.10	227
	Answered Question	1027
	Skipped Question	879

Other
250
self-employed
5000
Over 1000

1000+
over 1000
Marlborough College - over 700 people
400
not an owner
180

21) If you live in an area served by Kintbury, Hungerford, Bedwyn, Pewsey or Westbury, were good rail links important to your descision to move to the area?

	Response (%)	Responses
Very much so	60.61	1094
Partially	15.01	271
To a degree	8.48	153
No	5.37	97
No, I've always lived here	7.31	132
I don't live in an area served by Kintbury, Hungerford, Bedwyn, Pewsey or Westbury	3.21	58
	Answered Question	1805
	Skipped Question	101

22) Would you relocate home if a change at Newbury caused a significant deterioration in rail service?

	Response (%)	Responses
Definitely	14.53	256
Maybe	50.06	882
No	35.41	624

Answered Question	1762
Skipped Question	144

23) If a change at Newbury caused a significant deterioration in rail service, would you...

	Response (%)	Responses
Stop travelling	7.45	131
Use other forms of public transport	10.29	181
Use your car	82.26	1447
Answered Question		1759
Skipped Question		147

24) If rail services were more frequent and more reliable would you use them more?

	Response (%)	Responses
Definitely	78.54	1457
Maybe	19.14	355
No	2.32	43
Answered Question		1855
Skipped Question		51

25) From your experience of travelling on the Great Western line, how reliable do you think a connection at Newbury would be?

	Response (%)	Responses
Very	9.80	180
Moderately	42.68	784
Poor	36.74	675

Very poor		10.78	198
		Answered Question	1837
		Skipped Question	69

26) If you had to change trains at Newbury would you stop using the service?

		Response (%)	Responses
Definitely		29.31	542
Maybe		58.73	1086
No		11.95	221
		Answered Question	1849
		Skipped Question	57

27) If you had to change trains at Newbury, how much would you expect your fare to be discounted to compensate for the inconvenience?

		Response (%)	Responses
£0 - £1		3.14	57
£1 - £5		12.06	219
£5 - £10		21.20	385
Over £10		28.19	512
No compensation would be enough, I'd stop using the service		35.41	643
		Answered Question	1816
		Skipped Question	90

28) Would an additional 'late' direct fast service out of Paddington improve your train service?

		Response (%)	Responses
Definitely		74.97	1390

	Response (%)	Responses
Moderately	18.34	340
Not at all	6.69	124
	Answered Question	1854
	Skipped Question	52

29) Would better rail connections to the West improve your rail services?

	Response (%)	Responses
Definitely	72.41	1344
Moderately	21.12	392
Not at all	6.47	120
	Answered Question	1856
	Skipped Question	50

30) Over all how would you rate the current service from Kintbury, Hungerford, Bedwyn, Pewsey, Westbury?

	Response (%)	Responses
Excellent	5.93	112
Good	34.99	661
Adequate	45.26	855
Poor	12.71	240
Very poor	1.11	21
	Answered Question	1889
	Skipped Question	17