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Baseline Data Collection for Reston Rail Station

Contents

Introduction

Background

Reston Station, located in the village of Reston within the Scottish Borders, entered service on 23 May 2022. The station itself is located on the East Coast Main Line and is served by TransPennine Express and London North Eastern Railway (LNER) services.

Transport Scotland commissioned Stantec to provide baseline data collection which will be used to support future evaluations of the station. The rationale for investment in the new station was to address existing problems and unlock opportunities by improving access from East Berwickshire to employment, education and cultural opportunities in Edinburgh and Newcastle, and create opportunities for tourism and business investment within East Berwickshire. As part of the commission, Transport Scotland required baseline survey data for different user groups including:

- Residents
- Visitors
- Businesses

In addition, Transport Scotland requested counterfactual data to be collected. Establishing a counterfactual is an important step in evaluation as it measures what would have happened in the absence of the intervention. The impact is therefore considered by comparing the outcomes of the intervention against the counterfactual outcomes. In the context of this project, the counterfactual required research targeted at an area similar to Reston, which does not have access to the rail network.

In order for data to be relevant, all fieldwork, with the exception of the counterfactual survey, had to be completed by 20 May 2022 to allow an accurate ‘before’ opening picture.

Methodology

Baseline data collection was undertaken in order to provide pre-implementation travel pattern data. This will facilitate future evaluations to establish the success of the reopening of Reston Station and whether the project has achieved its objectives.

Three primary surveys were undertaken to understand attitudes and opinions on travel behaviour by locals, visitors and businesses, as well as to establish likely use of train services from Reston and potential benefits to the area. In addition to this, a counterfactual survey covering an area similar to Reston but without a new station was carried out. The purpose of the counterfactual is to allow a comparison, as part of future evaluations, of the impacts in the two areas and understand what would have happened if the station had not been opened.

Surveys were undertaken either over the phone through Computer Aided Telephone Interview (CATI) or using online panels. Online panels were used to identify respondents for each survey.

Resident, Visitor and Business surveys were all undertaken between 9 May 2022 and 20 May 2022. The Counterfactual survey ran from 22 May 2022 to 26 May 2022. Due to the Counterfactual survey being unrelated to Reston, the survey was not constrained by Transport Scotland's timetable for the opening of Reston station.

The key objectives for each survey were:

Residents

- To understand existing travel behaviour of local residents.
- To understand residents attitudes towards different transport options, frequency of services and access to services.
- To gather information on attitudes and intentions in light of the new rail station at Reston.

Visitors

- To understand current levels of tourism and activity.
- To understand travel behaviour of visitors to the area.
- To gather information on attitudes and intentions in light of the new rail station at Reston.

Businesses

- To understand the broader impacts of the introduction of the new station e.g. improved access for communities, to employment, education etc.
- The potential impact for freight users and other businesses.
- Impact of the rail station on other modes of transport e.g. service reduction; increased traffic flow; parking demand.
- Monitor wider economic benefits such as evidence of impact on local population levels, labour market supply, changes in land use, retail vitality and local housing market.

Counterfactual

- Collect baseline data to establish a comparator / counterfactual using primary research

Previous Work

Transport Scotland has undertaken significant work to allow the station to be built at Reston. In addition to detailed design work, it was imperative to develop a full business case to understand the scale of benefits which could be achieved by introducing the station. The business case notes key rationale for the scheme which included the following points:

- There is a lack of access to a wide range of employment, education, social and leisure opportunities for residents in East Berwickshire;
- There is poor transport connectivity generally, but particularly public transport, between the East Berwickshire area and the dynamic labour markets in Edinburgh and Newcastle with long and unreliable journey times by car and bus;
- East Berwickshire underperforms on a range of socio-economic measures and is considered by some stakeholders to be ‘lagging behind’ the rest of Scotland;

Given the above, the Business Case notes the delivery of the station will provide the following:

- The new station at Reston represents a step-change in terms of public transport accessibility for East Berwickshire, reducing the area’s peripherality and bringing it within closer reach of the principal economic centres in Edinburgh and Newcastle. This will enhance access to employment, education and leisure opportunities which will support social inclusion and encourage inward investment and tourism to the area;
- The scheme will contribute to the vision of the new National Transport Strategy by reducing inequality, encouraging modal shift to more sustainable modes and supporting inclusive economic growth by providing public transport mode choice options to a wider range of employment and education opportunities from East Berwickshire.

The purpose of this piece of work is therefore to set the baseline from which future evaluations can be compared against, allowing Transport Scotland to regularly monitor the impact of the new station at Reston.

Resident Survey

Introduction

The resident survey was CATI based and targeted at Reston and the surrounding area. Due to the relatively small population of Reston, a wider geographical area was chosen which was felt to represent potential users of the station. Selection of the catchment area was undertaken ensuring Reston remained the closest station and that residents would not have a shorter journey to existing stations at Dunbar or Berwick-upon-Tweed. While defining the catchment, it was estimated that the target area included a resident population of 20,038. Figure 1 below illustrates the catchment area.

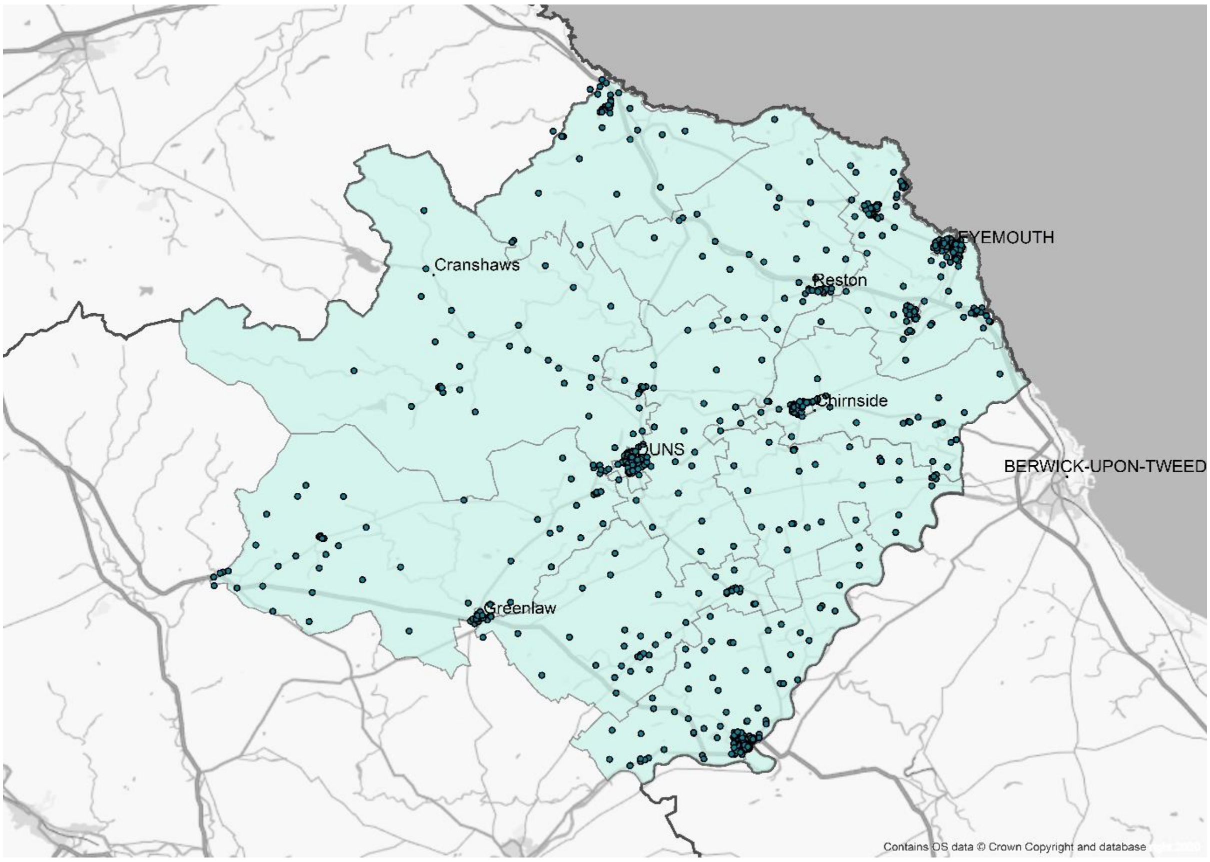

Figure 1 - Resident Survey Catchment Area

Due to study timetables, the limited population within the geographical location, and the COVID-19 recovery, neither a door-to-door or on-street survey was felt appropriate. Instead, a CATI survey was selected as the best approach. Stantec and Transport Scotland designed the survey while Intellisurvey took responsibility for coding, testing, piloting and undertaking the survey.

Respondent Profile

In total, 352 residents within the target area completed the survey. Of these, just over half (55%, n=195) were female, just under half (44%, n=155) were male, and 1% (n=2) preferred not to say. Five respondents chose not to disclose their age. Of those who did:

- 8% (n=30) were aged 0-44
- 47% (n=162) were aged 45-64
- 45% (n=155) were aged 65+

Most respondents (93%, n=327) came from a white ethnic group or background.

Table 1 Survey Respondent Ethnicity

Ethnic Group or Background	Number	Percentage
White (total)	327	93%
Scottish	180	51%
Other British	128	36%
Irish	3	1%
Other White Group/Background	16	5%
Mixed or Multiple Ethnic Groups	1	<1%
Asian, Asian Scottish or Asian British	3	1%
African	1	<1%
Caribbean or Black	1	<1%
Don’t know/Prefer not to say	19	5%
Total	352	100%

Table 2 below outlines the annual incomes before tax of those who specified this.

Table 2 Resident Survey Respondent Annual Income

Annual Income	Number	Percentage
Less than £10,000	43	19%
£10,001 - £20,000	68	30%
£20,001 - £30,000	54	24%
£30,001 - £40,000	26	12%
£40,001 - £50,000	18	8%
£50,001 - £60,000	7	3%
Over £60,000	10	4%
Total	226*	100%

* A further 126 respondents either preferred not to disclose their annual income or did not know this.

Just under a quarter of all respondents (22%, n=76) indicated that they had a physical or mental health condition or illness that would last or was expected to last 12 months or more. Of these, two thirds (67%, n=51) stated that their condition or illness impaired their mobility.

Just over one third of the total sample (35%, n=124) had a National Entitlement Card (NEC), while most respondents (82%, n=289) had full access to a car.

Table 3 Resident Survey Access to Vehicle

Access to a vehicle	Number	Percentage
Full access to a car	289	82%
Shared access to a car	29	8%
No access	19	6%
Prefer not to say/Not answered	15	4%
Total	352	100%

Visitor Survey

Introduction

A visitor survey was undertaken to establish how people from outside the area currently travelled to Reston and whether this may change due to the introduction of the rail station. Due to the lack of major tourist attractions in the immediate survey area, it was challenging to find a large enough sample of people who visited from outside the area. Therefore, online panels were used instead of CATI interviews. The panels were programmed to capture visitors from the nearby areas of the Scottish Borders, Edinburgh & The Lothians. Figure 2 below shows the target areas and response rate from each area.

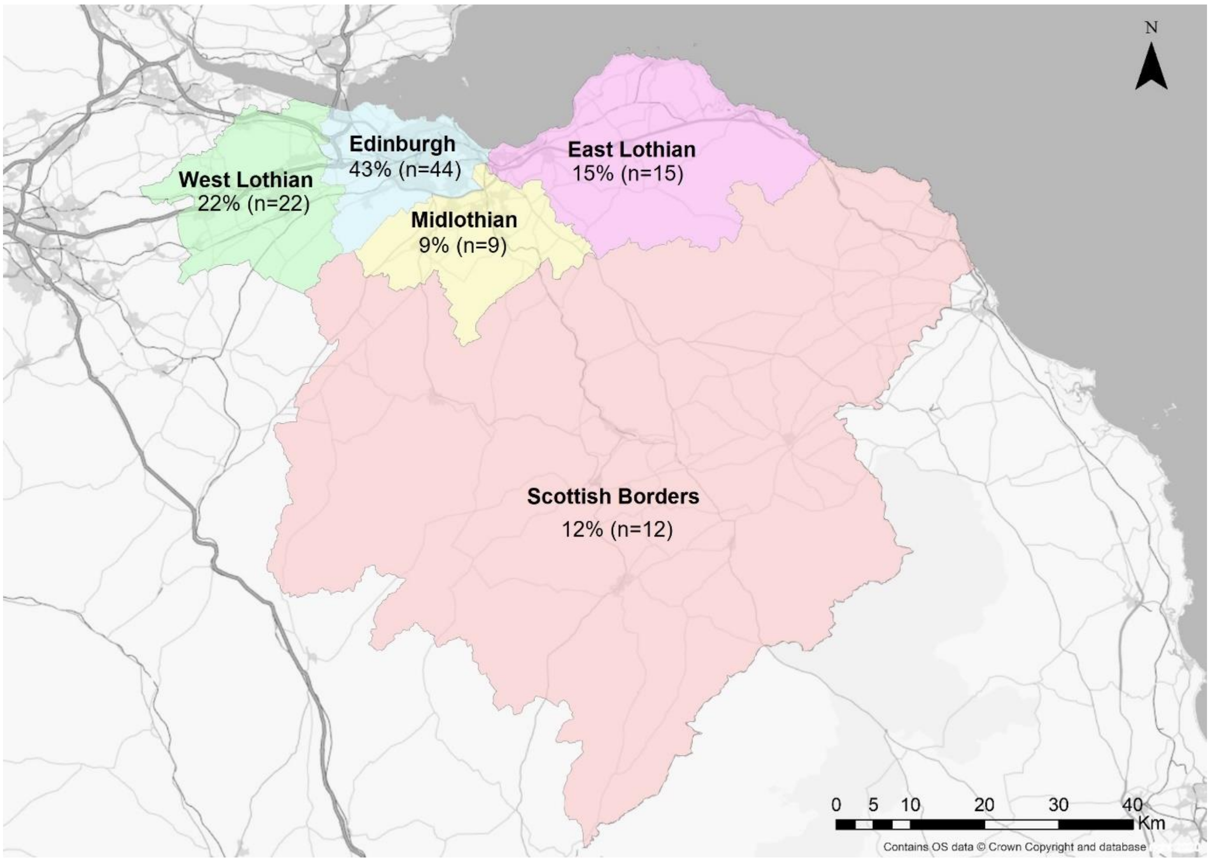

Figure 2 - Location of Visitor Survey Respondents

The panel approach allowed a wider target of participants from this expanded geographical area.

While the survey was termed a visitor survey, it was also designed to capture a subset of ‘non-visitors’. The purpose being to establish why these people currently choose not to visit Reston. For the purposes of analysis, anyone who visited less than once per year was classed as a non-visitor.

Respondent Profile

In total, 102 visitors within the target area completed the survey. Of these, 56% (n=57) were female and 44% (n=45) were male. The age breakdown of respondents was as follows:

- 55% (n=56) were aged 0-44
- 36% (n=37) were aged 45-64
- 9% (n=9) were aged 65+

Most respondents (95%, n=97) came from a white ethnic group or background.

Table 4 Visitor Survey Respondent Ethnicity

Ethnic Group or Background	Number	Percentage
White (total)	97	95%
Scottish	81	79%
Other British	9	9%
Irish	1	1%
Polish	2	2%
Other White Group/Background	4	4%
Asian, Asian Scottish or Asian British (total)	4	4%
Pakistani, Pakistani Scottish or Pakistani British	1	1%
Chinese, Chinese Scottish or Chinese British	3	3%
Arab, Arab Scottish or Arab British	1	1%

Table 5 below outlines the annual incomes before tax of those who specified this.

Table 5 Visitor Survey Respondent Annual Income

Annual Income	Number	Percentage
Less than £10,000	5	5%
£10,001 - £20,000	27	28%
£20,001 - £30,000	24	24%
£30,001 - £40,000	9	9%
£40,001 - £50,000	14	14%
£50,001 - £60,000	7	7%
Over £60,000	12	12%

Total	98*	100%

* A further 4 respondents preferred not to disclose their annual income.

Overall, 15% (n=15) of respondents indicated that they had a physical or mental health condition or illness that would last or was expected to last 12 months or more. Of these, 40% (n=6) stated that their condition or illness impaired their mobility.

Just over one fifth of the total sample (21%, n=21) had a NEC, while around two thirds of the respondents (67%, n=68) had full access to a car. As shown in the table below, 22% (n=23) of respondents indicated that they had no access to a vehicle.

Table 6 Visitor Survey Respondent Access to Vehicle

Access to a vehicle	**Number**	**Percentage**
Full access to a car	68	67%
Shared access to a car	10	10%
No access	23	22%
Prefer not to say/Not answered	1	1%
Total	102	100%

Business Survey

Introduction

A business survey was undertaken across the study area to better understand the thoughts of the business community on the potential benefits and impacts of the introduction of the station. The study area was developed to be consistent with the resident survey, so CATI based interviews were also used to complete the fieldwork.

Respondent Profile

In total, 100 businesses completed the survey. The businesses were asked to provide the first five digits of their postcode (the postcode sector) with the locations shown in Figure 3. The largest proportion of the businesses who took part were located in the postcode sector TD15 1, which is situated in the south east of the study area. There were also between 16 and 25 business responses from the postcode sector TD14 5, which includes Reston and Eyemouth, and TD11 3, which includes Duns.

It should be noted that eight respondents indicated that the location stated, and shown on the map, was not their principal business location. However, in all such instances the principal business location was within the same general area.

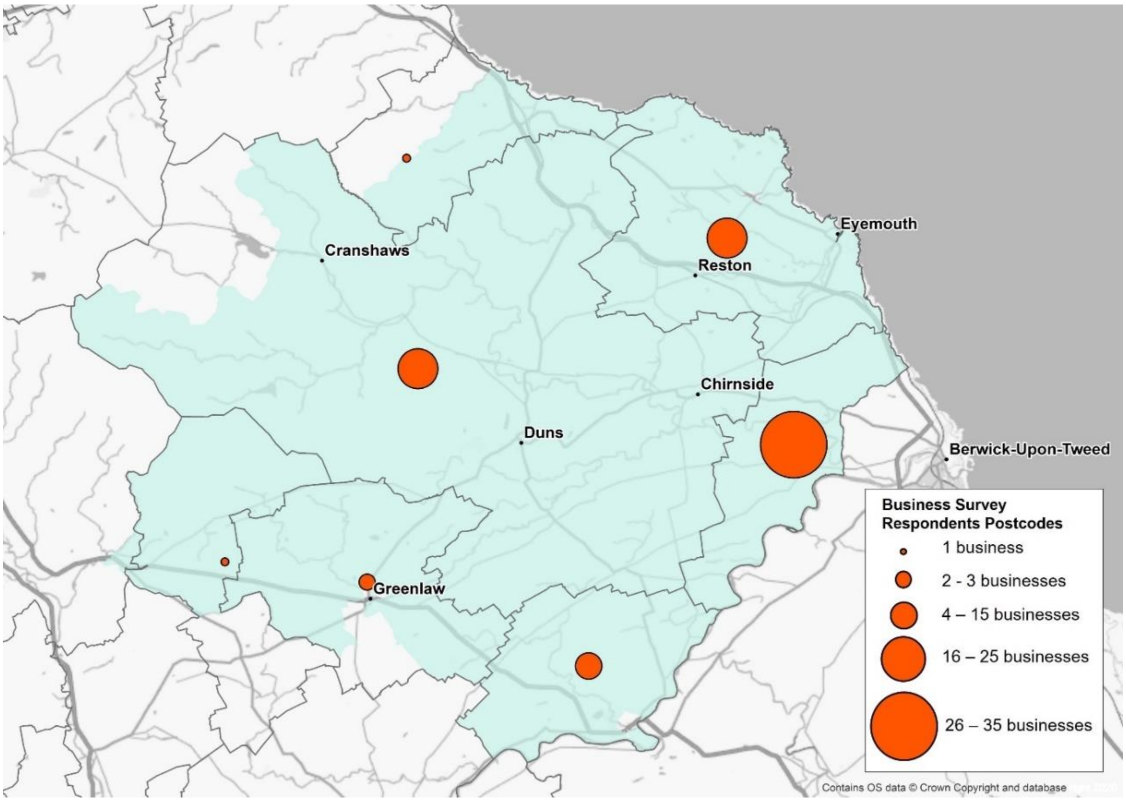

Figure 3 - Location of Business Responding to the Survey

Just over a third (36%, n=36) of the respondents noted that they had other business premises elsewhere in the UK. Of these, 26 were based in the Scottish Borders and East Lothian, with the other 10 located elsewhere in the UK. Among the 26 businesses based across the Scottish Borders and East Lothian, four businesses were located in Berwickshire, three in Edinburgh and two in Kelso. Several respondents noted that they had premises in several locations across the Scottish Borders, East Lothian and Edinburgh.

Respondents were asked to note what the primary activity was of their business. As shown in Figure 4, the largest proportion of respondents (21%, n=21) noted that their business was in ‘accommodation and food service activities’. This was followed by 20% (n=20) being in the ‘wholesale and retail trade’; ‘repair of motor vehicles and motorcycles’, 11% (n=11) in ‘human health and social work’ and 10% (n=10) in an ‘other’ sector. Generally, the businesses that responded to the survey spanned a wide range of business activities and sectors.

Finally, respondents were asked to describe their role in the organisation. Around a third (35%, n=35) indicated that they were the owner of the business; eight percent (n=8) noted that they were a ‘Partner’ in the business; six percent (n=6) indicated that they were a ‘Director’; and another 35% (n=35) were managers. The other respondents worked across admin, customer experience and finance.

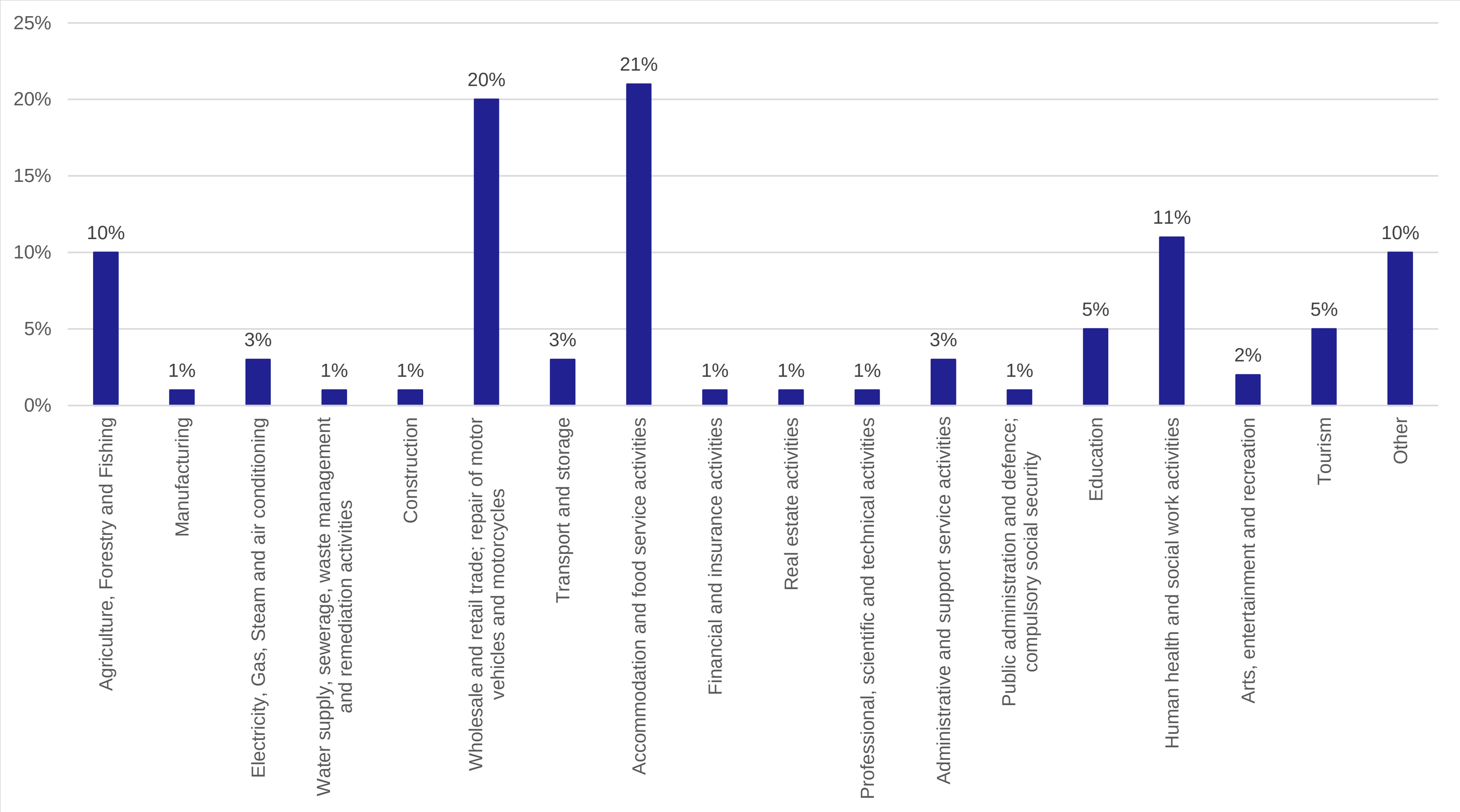

Figure 4 - Primary Activity of Respondent Businesses

Counterfactual Survey

Introduction

As with all evaluations, it was important to develop and understand the counterfactual situation. In this case the counterfactual is a similar area that has not had a new station and acts as a proxy for what would have happened in the Reston area if the new station had not been built. Future evaluations will therefore compare the impacts in Reston against the impacts in a similar area elsewhere.

Ancrum, a small village within the Scottish Borders, was selected as the counterfactual study area. Ancrum is situated within the central part of the Scottish Borders area, between Jedburgh and St Boswells. Similar to Reston before the station opened, there is no rail access in the village, with the closest station located 12 miles away at Tweedbank. Population numbers are also similar to Reston.

Consistent with the approach to the Reston resident survey, an expanded survey area was chosen to capture an appropriate sample size. The counterfactual survey was again delivered as a CATI survey, and while there was consistency in some of the questions between this and the residents survey, the counterfactual was more focussed on current travel patterns.

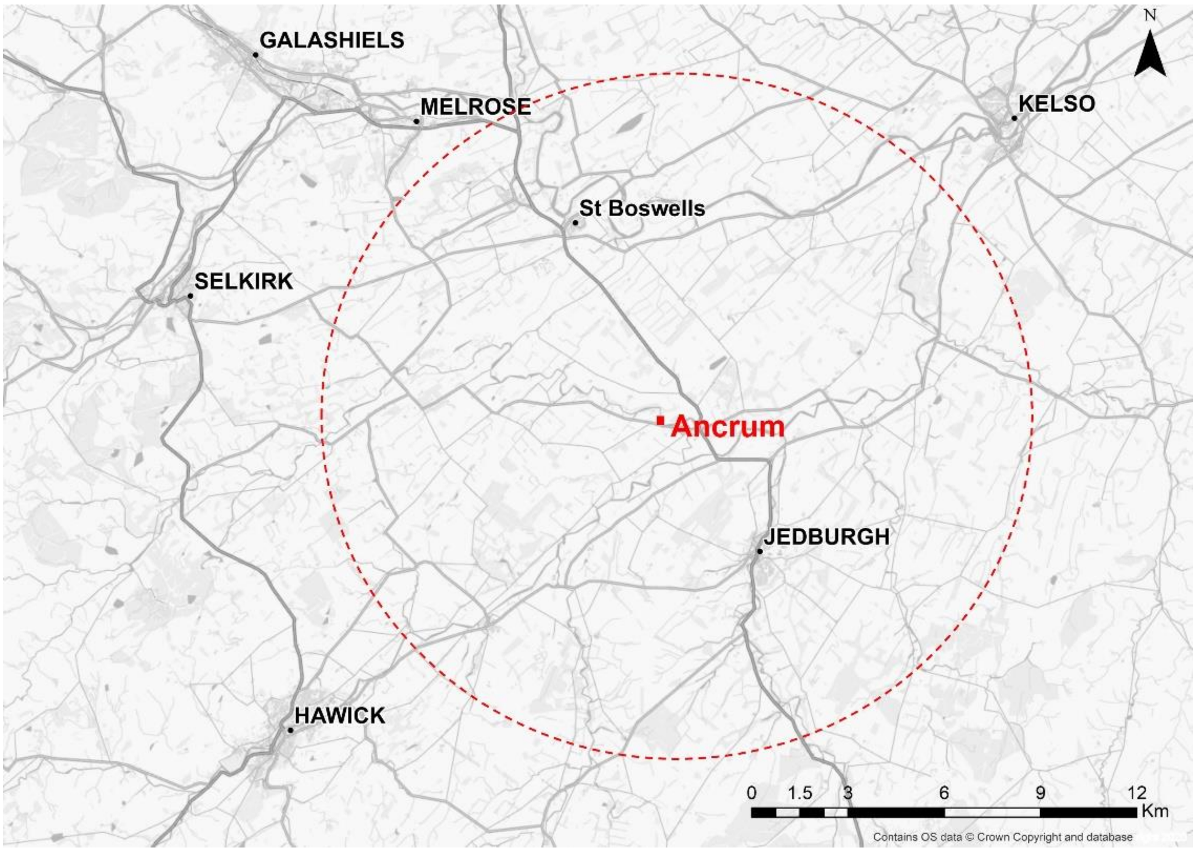

Figure 5 - Counterfactual Survey Respondent Area

Respondent Profile

In total, 101 respondents within the counterfactual area completed the survey. Of these, 63% (n=64) were female, 36% (n=36) were male, and 1% (n=1) preferred not to say. One respondent chose not to disclose their age but of the 100 who did:

- 7% (n=7) were aged 0-44
- 34% (n=34) were aged 45-64
- 59% (n=59) were aged 65+

As shown in Table 7, the vast majority of respondents (95%, n=95) came from a white ethnic group or background.

Table 7 Counterfactual Survey Respondent Ethnicity

Ethnic Group or Background	Number	Percentage
White (total)	95	94%
Scottish	68	67%
Other British	24	24%
Other White Group/Background	3	3%

Indian, Indian Scottish or Indian British	1	1%
Don’t know/Prefer not to say	5	5%
Total	101	100%

Table 8 below outlines the annual incomes before tax of those who specified this.

Table 8 Counterfactual Survey Respondent Annual Income

Annual Income	Number	Percentage
Less than £10,000	11	19%
£10,001 - £20,000	21	36%
£21,001 - £30,000	13	22%
£30,001 - £40,000	8	14%
£40,001 - £50,000	1	2%
£50,001 - £60,000	0	7%
Over £60,000	4	12%
Total	58	100%

*A further 43 respondents either preferred not to disclose their annual income, or did not know this

Just over a quarter of all respondents (26%, n=26) indicated that they had a physical or mental health condition or illness that would last or was expected to last 12 months or more. Of these twenty-six, 54% (n=14) stated that their condition or illness impaired their mobility.

Over half of the total sample (59%, n=60) had a National Entitlement Card (NEC), while the majority of respondents (81%, n=82) had full access to a car. Only 9% (n=9) of respondents had no access to a car.

Survey Analysis

The sample profile above represents the true breakdown of respondents, however, the following analysis of the Resident, Visitor and Counterfactual surveys are based on weighted data. Data for these three surveys was weighted by age profiles to the National Records of Scotland Mid-2020 Population Estimates. For the Resident and Counterfactual survey, age data was weighted to the corresponding population data for the Scottish Borders, while the Visitor survey weighted the data against the average for the relevant ‘in scope’ local authority areas (i.e. the Scottish Borders, Edinburgh and the Lothians). Business survey data was not subject to weighting.

The analysis below largely consists of descriptive frequencies. While more detailed disaggregate analysis was considered, the sample sizes both by questionnaire type and at individual questions was generally too low for this to provide reliable and robust results. Qualitative data was also read to identify the key themes and issues. Quotes have been included where relevant to illustrate the main points raised.

Resident Survey Results

Introduction

As outlined above, 352 respondents completed the Resident's survey questionnaire. Results in this section are weighted to be representative by age.

Employment Status

Respondents were asked to indicate their working status. Table 9 below shows that most respondents either worked full-time or part-time (58%, n=206), or were retired (26%, n=93).

Table 9 Resident Survey – Employment Status

Employment Status	Number	Percentage
Full time employment	128	36%
Part time employment	78	22%
Full or part time further education	1	<1%
Not in employment due to illness or disability	10	3%
Unemployed	12	3%
Retired	93	26%
Other	19	5%
Prefer not to say	12	3%
Total	**352**	**100%**

The majority of respondents who indicated an 'other' employment status were self-employed.

Travel to Work and Education

Of the 207 respondents who indicated they were in work or education, most (67%, n=139) travelled to a fixed place of work/education entirely, 19% (n=39) had flexible arrangements and so partially worked/learned from home and partially travelled to a fixed location, while 14% (n=29) entirely worked/learned from home. The location of the respondent's place of work/education are shown, by postcode sector, in Figure 6.

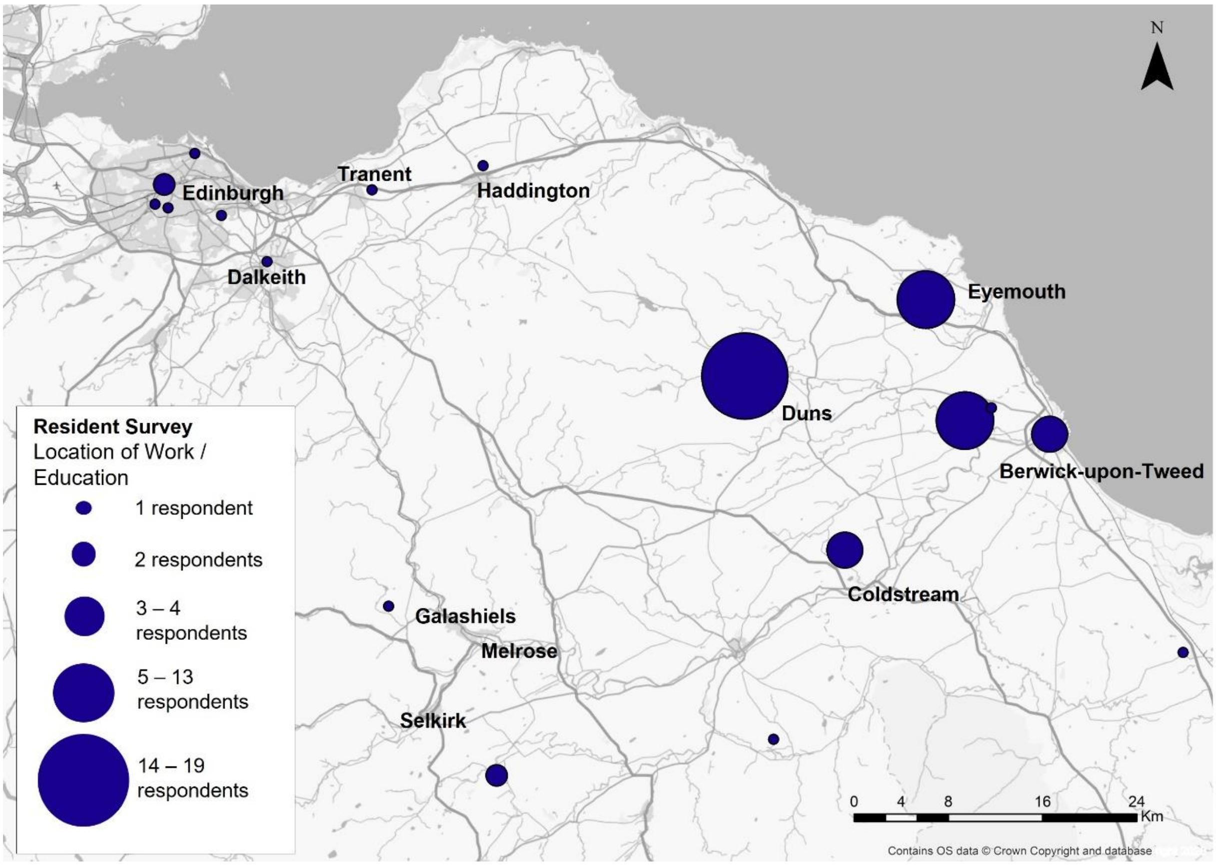

Figure 6 - Resident Survey - Respondent work/education location

Respondents typically travelled for work/educational purposes five days a week (43%, n=76), with a further 41% (n=72) travelling between two and four days a week.

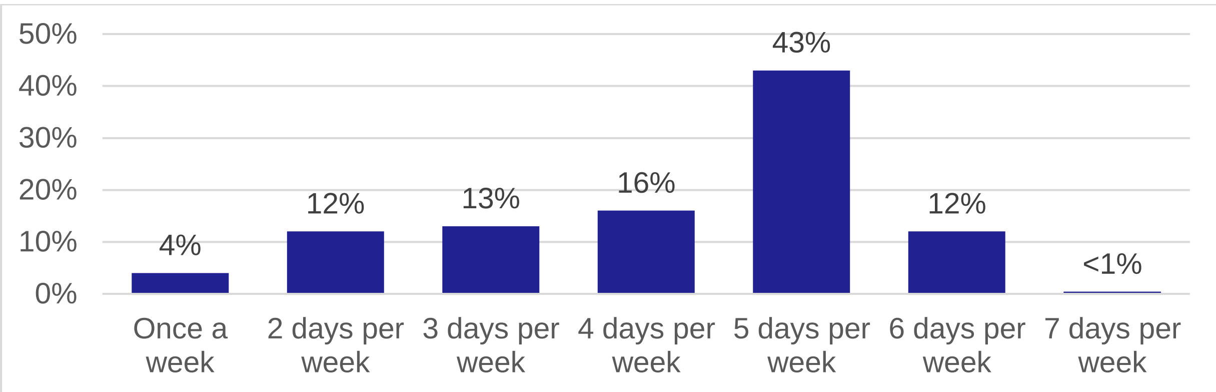

Figure 7 - Resident Survey - Frequency of travel for work/education

Respondents generally travelled for up to 30 minutes (80%, n=142), with 20% (n=35) travelling for longer:

- <10 mins: 26%
- 10-15 mins: 29%

- 16-30 mins: 26%
- 31 mins-1 hour: 17%
- >1 hour: 3%

Most respondents drove to work/education (82%, n=145), with 11% walking. All other modes were used by small numbers of respondents only.

Table 10 Resident Survey – Mode of travel to work/education

Travel Mode	Number	Percentage
Car / Van (drove myself)	145	82%
Walk	20	11%
Rail	3	1%
Park & Ride (Rail)	1	<1%
Cycle	1	1%
Bus	1	<1%
Car / Van (dropped off)	1	1%
Other	6	4%
Total	**178**	**100%**

The respondent who took the bus used the number 51 Lothian Bus service.

Parking was generally done at the respondent's workplace (66%, n=95), or in free on-street or car parks (26%, n=37). Only one respondent parked in on-street/car parks which they had to pay for, and 11 respondents noted 'other' locations they used to park, including at a train station car park, school, university and leisure centre car parks, and at their home/at private residences.

Travel for Personal Business / Leisure

Destinations Visited

All respondents were asked to identify the locations they had travelled to for personal business (including trips to/from banks, churches, hospitals, doctors' surgeries, dentists, hairdressers, libraries etc.) and for leisure purposes in the last 30 days. Table 11 shows that most respondents had visited Berwick-upon-Tweed (82%, n=289), followed by Eyemouth (44%, n=154) and Edinburgh (41%, n=144) for business purposes, while the most commonly visited destinations for leisure were North Berwick (61%, n=214), Haddington (35%, n=122), and Berwick-upon-Tweed (34%, n=121).

Table 11 Resident Survey – Destinations visited for both personal business and leisure

Destination	Personal Business (no.)	Leisure (no.)	Personal Business (%)	Leisure (%)
Eyemouth	**154**	59	**44%**	17%
Dunbar	92	36	26%	10%
North Berwick	37	**214**	11%	**61%**
Haddington	52	**122**	15%	**35%**
Musselburgh	29	49	8%	14%
Edinburgh	**144**	18	**41%**	5%
Berwick-upon-Tweed	**289**	**121**	**82%**	**34%**
Newcastle	61	17	17%	5%
Other	77	79	22%	31%
Base*	**252**	**252**		

* Multiple responses were given at these questions.

The most commonly visited 'other' locations for both personal business and leisure included Kelso, Galashiels and Duns. Lauder, Etal and York were also mentioned with some frequency as destinations for leisure travel.

Frequency of Visits

Table 12 shows that most locations were visited up to five times in the last 30 days for personal business, although Eyemouth and Berwick-upon-Tweed were more likely to be visited more often.

Table 12 Resident Survey – Frequency of personal business trips

Personal Business Travel	Up to 5 times	6-10 times	11-15 times	16-20 times	21-30 times	>30 times	Base:
Eyemouth	46%	17%	4%	5%	24%	4%	n=161
Dunbar	86%	4%	2%	7%	1%	-	n=95
North Berwick	87%	-	-	13%	-	-	n=38
Haddington	88%	2%	-	9%	-	-	n=55
Musselburgh	98%	2%	-	-	-	-	n=30
Edinburgh	94%	4%	1%	1%	-	-	n=146
Berwick-upon-Tweed	50%	19%	9%	9%	12%	1%	n=291
Newcastle	99%	1%	-	-	-	-	n=61
Other	85%	6%	3%	2%	3%	-	n=78

Similarly, most respondents had travelled to each location for leisure purposes up to five times in the last 30 days (see Table 13). However, Berwick-upon-Tweed, Eyemouth, and to a lesser extent, Dunbar were more likely to be visited more often.

Table 13 Resident Survey – Frequency of leisure trips

Leisure Travel	Up to 5 times	6-10 times	11-15 times	16-20 times	21-30 times	>30 times	Base:
Eyemouth	54%	19%	6%	-	16%	5%	n=119
Dunbar	83%	4%	4%	9%	-	-	n=59
North Berwick	100%	-	-	-	-	-	n=18
Haddington	100%	-	-	-	-	-	n=36
Musselburgh	100%	-	-	-	-	-	n=17
Edinburgh	97%	2%	-	-	-	-	n=122
Berwick-upon-Tweed	51%	25%	5%	12%	7%	<1%	n=214
Newcastle	99%	1%	-	-	-	-	n=50
Other	89%	6%	2%	1%	2%	-	n=79

Travel Mode

Table 14 and

Table 15 show that respondents had a heavy reliance upon private vehicle use to access all locations for both personal business and leisure-based travel, with most indicating that they would drive themselves in each instance. Where rail travel was used, this was generally for trips to Newcastle and Edinburgh, while walking was more likely to be used for trips to Eyemouth compared to all other destinations. Bus use was more common when travelling to Newcastle, Berwick-upon-Tweed and 'Other' locations for leisure purposes.

Table 14 Resident Survey – Travel mode for personal business trips

Personal Business Travel	Eyemouth	Dunbar	North Berwick	Haddington	Musselburgh	Edinburgh	Berwick-upon-Tweed	Newcastle	Other
Walk	14%	-	-	1%	-	-	1%	-	-
Cycle	<1%	-	-	-	-	-	-	-	-
Bus	5%	-	-	-	-	1%	5%	2%	8%
Bus & Rail	-	-	-	-	-	<1%	-	-	-
Rail	-	-	-	-	-	9%	-	29%	2%
Park & Ride (Bus)	-	-	-	-	-	1%	<1%	-	-
Park & Ride (Rail)	-	-	-	-	-	5%	-	-	-

Car/Van (dropped off)	6%	6%	17%	13%	2%	4%	10%	11%	3%
Car/Van (drove self)	74%	93%	80%	84%	98%	78%	84%	58%	87%
Other	1%	1%	3%	1%	-	2%	<1%	-	-
Base:	n=160	n=94	n=38	n=55	n=30	n=146	n=291	n=61	n=78

Table 15 Resident Survey – Travel mode for leisure trips

Leisure Travel	**Eyemouth**	**Dunbar**	**North Berwick**	**Haddington**	**Musselburgh**	**Edinburgh**	**Berwick-upon-Tweed**	**Newcastle**	**Other**
Walk	22%	-	-	-	-	-	2%	1%	1%
Cycle	1%	-	-	-	-	-	<1%	-	-
Bus	1%	-	-	-	-	1%	6%	12%	8%
Bus and Rail	-	-	-	-	-	1%	-	-	-
Rail	-	-	-	-	-	16%	-	28%	4%
Park and Ride (Bus)	-	2%	-	-	4%	1%	-	-	-
Park and Ride (Rail)	-	-	-	-	-	5%	-	2%	-
Car/Van (dropped off)	7%	9%	14%	4%	8%	5%	11%	14%	17%
Car/Van (drove myself)	68%	89%	79%	93%	88%	70%	78%	43%	69%
Other	1%	-	7%	3%	-	1%	3%	-	1%
Base:	n=119	n=59	n=18	n=36	n=17	n=122	n=214	n=50	n=79

Bus Services Used

Bus services which were noted to be used for both personal business and leisure purposes included:

- Border Buses and Travel Sure for travel to Eyemouth
- The No. 31 and 51 buses, using Lothian and Border Buses respectively, for travel to Edinburgh
- A range of Border Buses and Travel Sure, including No. B1, 60, 64, 67, 68, 235, 260, and 767 for travel to Berwick-upon-Tweed
- Travel Sure and Glenn Valley buses for travel to Newcastle
- Border Buses for travel to ‘other’ locations

Journey Times

Respondents were also asked how long the journey took to each location they visited for personal business and leisure purposes. Table 16 and Table 10 show the breakdown of the results. Respondents generally travelled for the least amount of time to reach Eyemouth and Berwick-upon-Tweed, with most journeys to these destinations taking up to 30 minutes. Conversely, respondents travelled the longest to reach Newcastle, Edinburgh and Musselburgh.

Table 16 Resident Survey – Personal business trip journey time

Personal Business Travel	**<10 mins**	**10-15 mins**	**16-30 mins**	**31 mins - 1 hour**	**>1 hour**	**Base:**
Eyemouth	21%	38%	22%	11%	7%	n=160
Dunbar	1%	6%	48%	45%	-	n=94
North Berwick	-	1%	18%	75%	5%	n=38
Haddington	-	11%	30%	51%	9%	n=55
Musselburgh	2%	-	24%	40%	35%	n=30
Edinburgh	<1%	<1%	2%	72%	26%	n=146
Berwick-upon-Tweed	3%	46%	46%	4%	<1%	n=290
Newcastle	1%	-	-	51%	48%	n=61
Other	3%	18%	25%	30%	24%	n=78

Table 10 Resident Survey – Leisure trip journey time

Leisure Travel	**<10 mins**	**10-15 mins**	**16-30 mins**	**31 mins- 1 hour**	**>1 hour**	**Base:**
Eyemouth	32%	39%	21%	4%	4%	n=119
Dunbar	-	3%	64%	32%	1%	n=58
North Berwick	-	-	7%	89%	4%	n=18
Haddington	-	-	10%	75%	14%	n=36
Musselburgh	-	3%	11%	51%	34%	n=17
Edinburgh	-	1%	2%	70%	28%	n=122
Berwick-upon-Tweed	4%	50%	41%	4%	<1%	n=214
Newcastle	1%	-	-	29%	70%	n=50
Other	3%	17%	31%	20%	28%	n=79

Use of the Rail Network

From the travel patterns for work/education, personal business and leisure activities identified above, respondents were categorised into those who use the rail network and those who do not. Most respondents (86%, n=305) did not use the rail network for travel, compared to 13% (n=47) who did, most of whom caught the train from

Berwick-upon-Tweed (89%, n=42), with the remainder using Dunbar, Stow and Tweedbank.

Of those who used the rail network, over half travelled to the station via car/van (67%, n=32), while 15% (n=7) used the bus to get to the train station and 13% (n=6) walked.

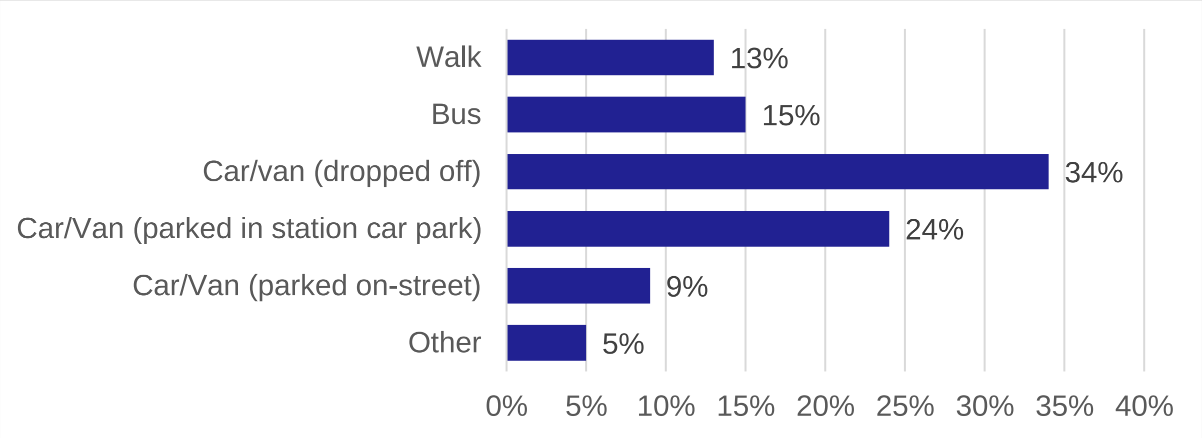

Figure 8 - Resident Survey – Travel to the rail network

Base = 47

Respondents were also asked to rate the extent to which they were satisfied with a range of journey aspects. Figure 9 details the responses, and shows that the highest levels of satisfaction were recorded for:

- Journey times - where 96% (n=45) of respondents were satisfied to some extent
- The availability of seats on the train - where 92% (n=43) of respondents were satisfied overall
- On-board comfort - where 89% (n=41) were satisfied to some extent
- The reliability of train services on the line - where 84% (n=39) were either very satisfied or satisfied

Those aspects with the lowest levels of satisfaction, and the highest levels of dissatisfaction were:

- The time of the first/last train - where 44% (n=20) were either dissatisfied or very dissatisfied
- The availability of parking spaces at the local station car park - where 30% (n=13) of respondents were generally dissatisfied to some extent
- The frequency of train services on the line - where 23% (n=11) were dissatisfied overall

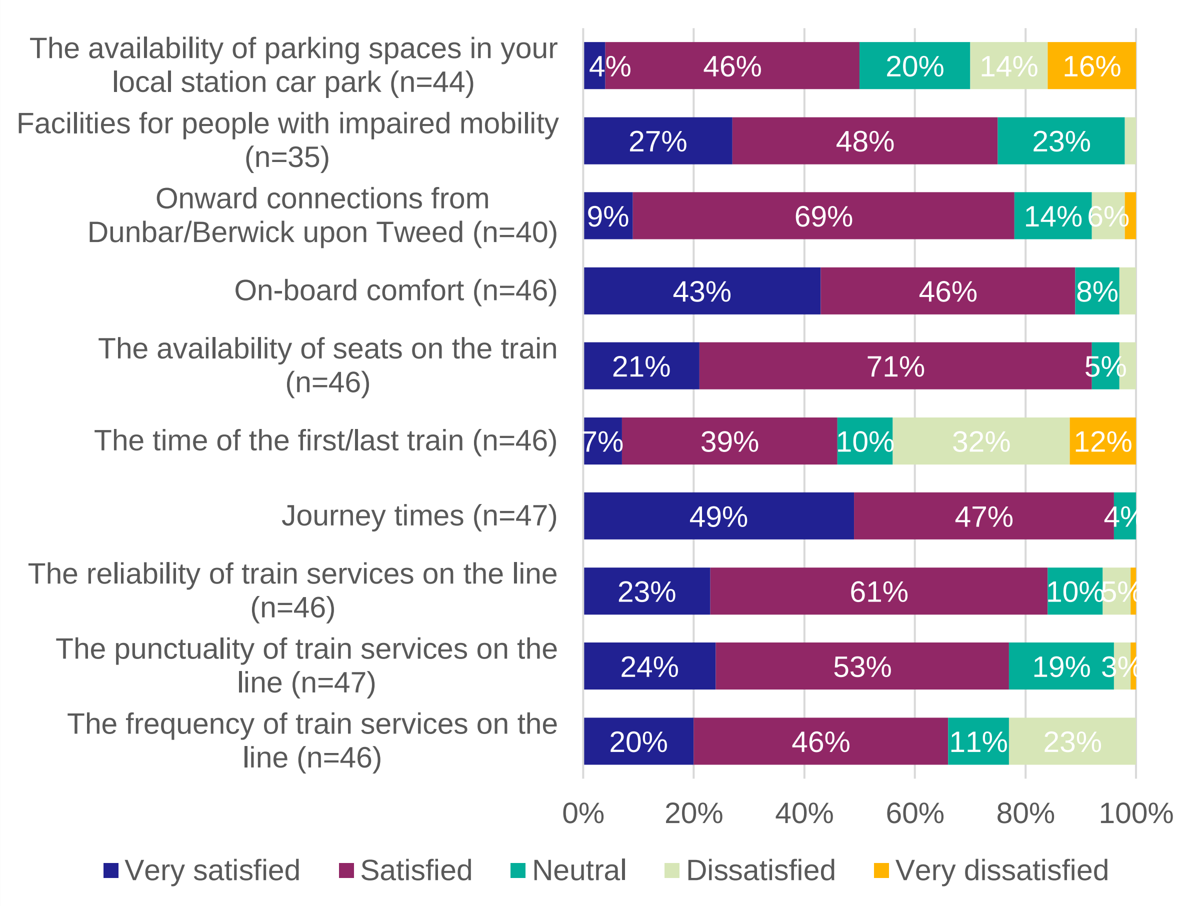

Figure 9 - Resident Survey – Satisfaction with rail-based journey

The main complaints regarding frequency were that there were too few trains in general or that they did not start early enough or run late enough. Several respondents also commented that not all existing stations were served by all trains passing through them.

Reasons given for dissatisfaction with the time of the first/last train largely focused on perceptions that the last train left too early, meaning that they were seen as not serving evening entertainment needs. This was a view held about trains to both Edinburgh and Newcastle, and was considered to impact respondents’ ability to attend the cinema, the theatre, football matches, and other general evening social activities:

> *“Lack of late service, last is 9pm and is too early and rules out going to theatre.”*

> *“I would like a later one coming into Berwick from either Edinburgh or Newcastle. This would make me use them more because then I could have a meal or have a night out.”*

Parking at train station car parks was another area where several respondents were dissatisfied. The main reasons given were that the car parks were too small for the volume of people who wanted to use them. A few also felt that they were too expensive:

> *"The car parks too small and full almost all the time."*

> *"There's not enough and it costs a fortune."*

Reasons for Not Using the Rail Network

Those who did not use the rail network were asked to outline their reasons, with just over 40% indicating they did not travel to destinations served by the rail network (41%, n=124) or that they would like to use the rail network but were unable to (42%, n=129).

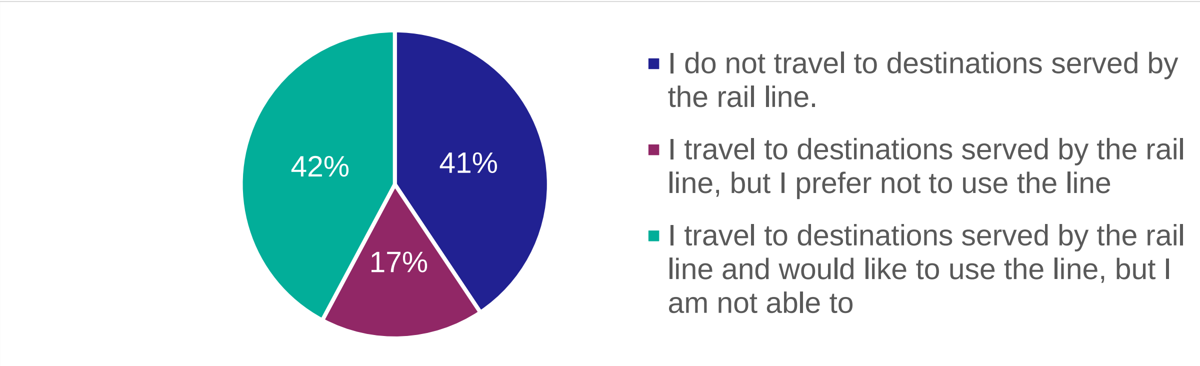

Figure 10 - Resident Survey – Reasons for not using the rail network

Respondents were also asked to identify the issues related to their reasons for not travelling by train, with the results detailed in Figure 11. This shows that three quarters (76%, n=137) of those who did not travel by train, indicated that a major reason for this was that they liked the convenience of travelling by private vehicle. The availability of other public transport connections was also a major factor for around half of the respondents:

- Public transport options between respondent's house and the station were not convenient/did not exist – this was a major factor for 60% (n=110)
- Public transport options between the end station and respondents' desired destination were not convenient/did not exist – this was a major factor for 50% (n=91)

Other reasons given included convenience or speed of travelling to destinations by car versus rail, with several noting that it would take longer to travel to the train station and catch the train than to drive to their destination. Others noted that the train station took them out of their way for the journey and so it was more direct to drive or use other means. A lack of stations nearby and/or at the destinations they wished to visit, or lack of rail services connecting locations were also issues for some. In addition, a few also discussed the difficulty of travelling with additional needs, and the requirement to pre-book this meaning short notice or spontaneous journeys are not possible.

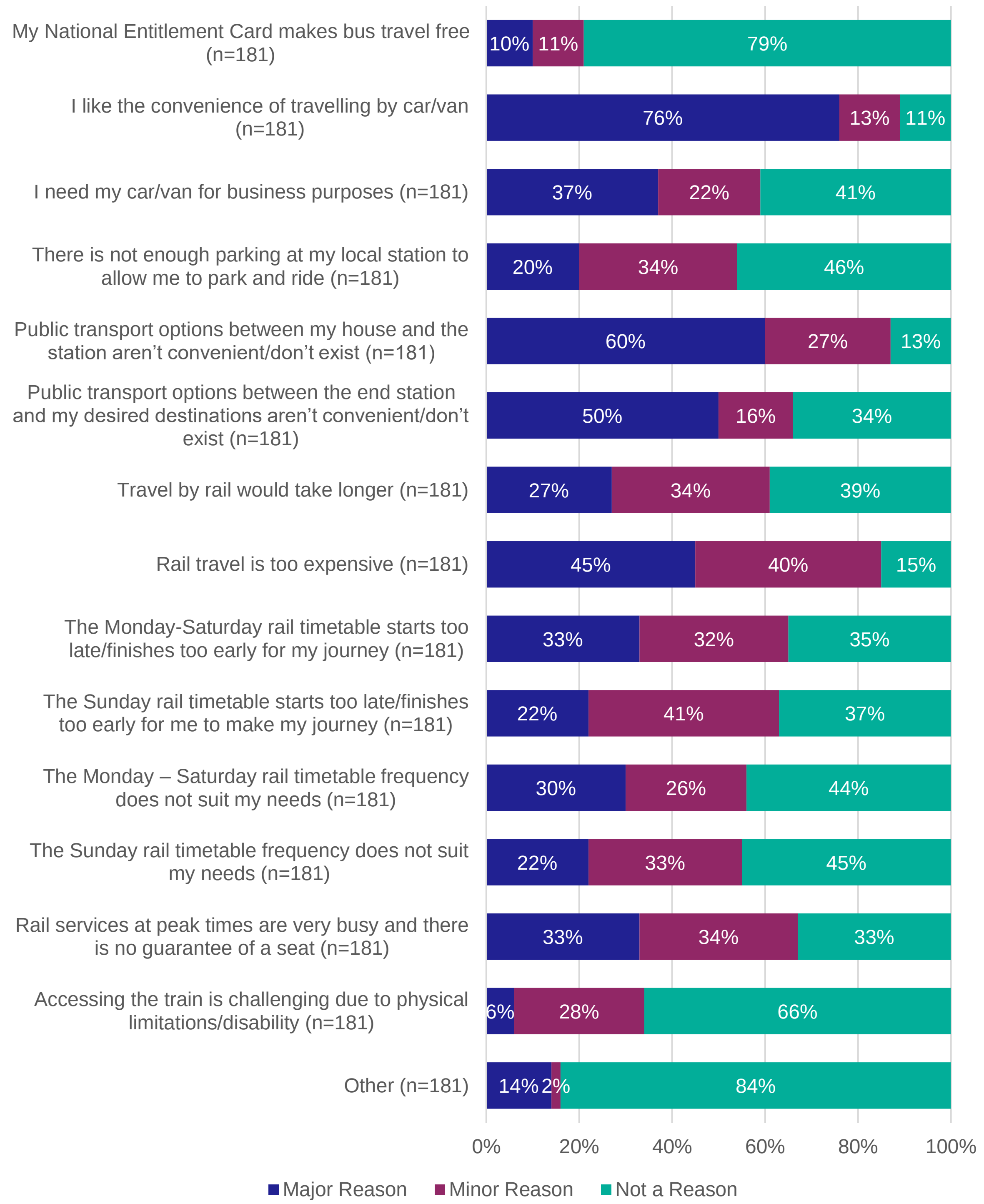

Figure 11 - Resident Survey – Reasons for not using train

Anticipated Impact of a Reston Rail Link

All respondents were asked whether they planned to use the new train station at Reston once it opened. Overall, 40% (n=141) said they did plan to use it, and a further 22% (n=77) were unsure. Just over a third of respondents (38%, n=134) said they would not use it.

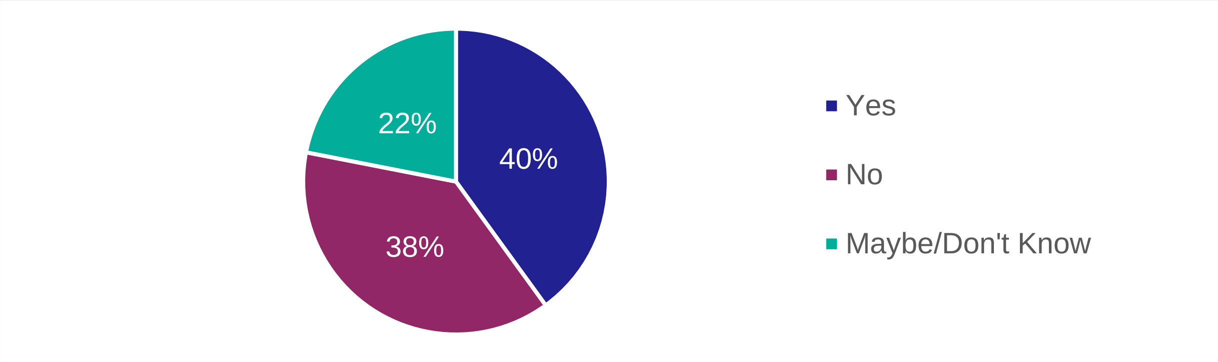

Figure 12 - Resident Survey – Intent to use the Reston rail link

All respondents, regardless of their plans to use the station or not, were asked what types of journeys they thought they might use the station for. Around three quarters (74%, n=261) indicated that they would use it for leisure purposes. All other journey purposes were noted to be likely by much fewer respondents, with personal business identified as a likely reason for using Reston station by 18% (n=62), for employment and work purposes by 9% (n=30), and education given as a reason for 7% (n=23) of respondents. At this question, less than a quarter (21%, n=73) of the respondents selected ‘None of the above’. All these respondents indicated that they either did not plan to use the station or didn’t know whether they would use the station in the previous question.

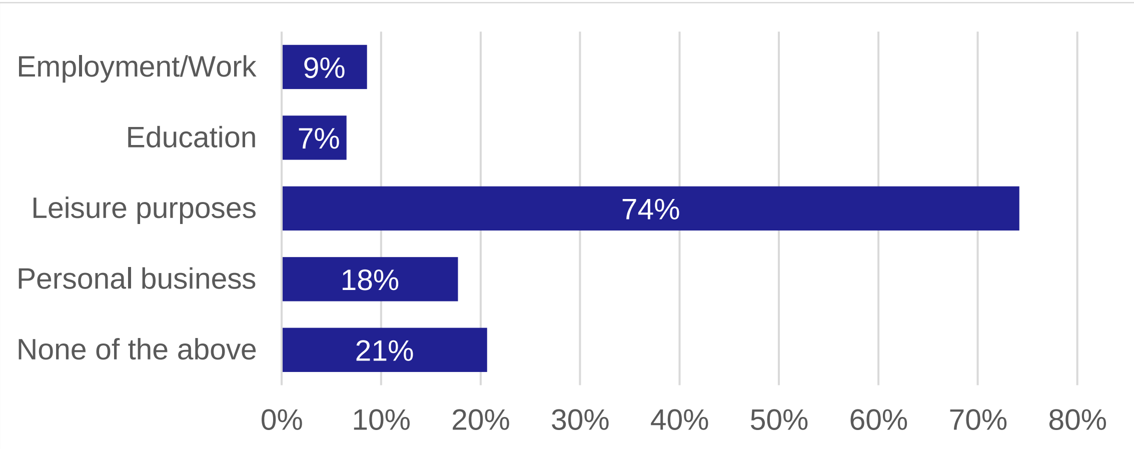

Figure 13 - Resident Survey – Intended travel purpose when using new rail link

Note: Multiple responses were provided at this question.

Visitor Survey Results

Introduction

As outlined above, 102 respondents completed the visitor's survey questionnaire. Results in this section are weighted to be representative by age.

Visiting East Berwickshire

Of the 102 respondents who completed the visitors survey, 76% (n=78) had visited East Berwickshire.

As shown in Figure 14, the largest proportion of these respondents (33%, n=26) indicated that they visited East Berwickshire twice a year. Only one respondent (1%, n=1) indicated that they visited daily, with 6% (n=5) indicating that they visited weekly.

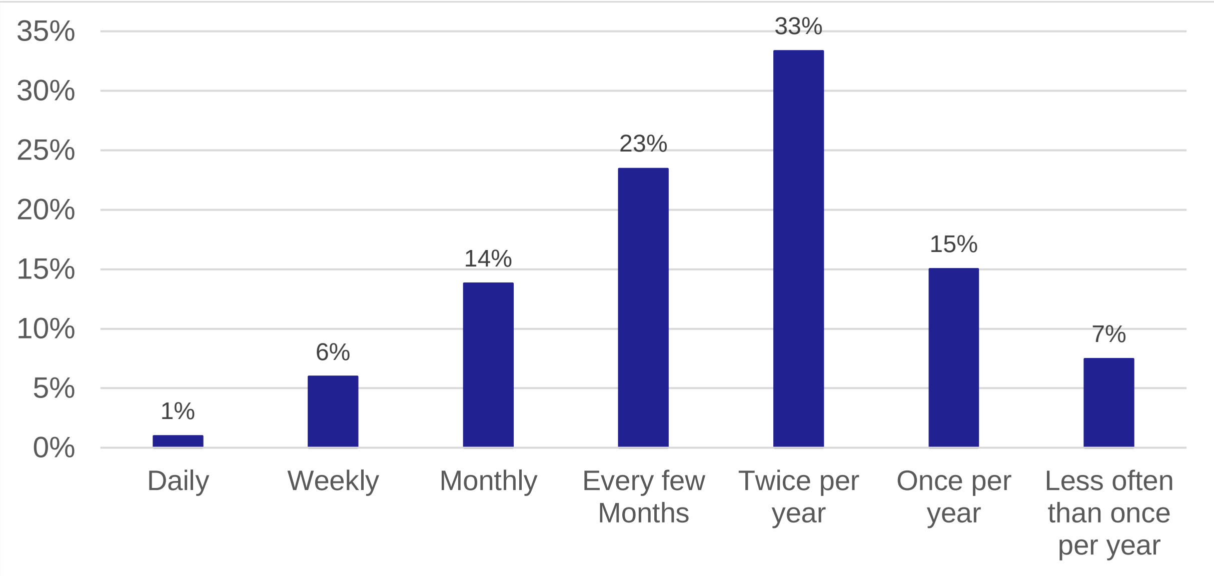

Figure 14 - Visitor Survey – Frequency of visiting East Berwickshire

Respondents who visited the area at least once per year were classified as regular visitors. As such, 71% (n=73) of the 102 respondents to the survey were regular visitors to East Berwickshire.

The regular visitors were asked to indicate how long they spend in East Berwickshire when they visit. As shown in Table 10, the largest proportion of respondents (64%, n=46) travelled to East Berwickshire for a day trip.

Table 10 Visitor Survey – Duration of visit to East Berwickshire

Duration of Visit	Number	Percentage
Day trip	46	64%
One night	8	11%
Two nights	10	14%
Three – six nights	2	3%
Weekend break	2	2%
Week	3	4%
Longer than a week	2	3%
Total	**73**	**100%**

Overall, most respondents (57%, n=42) indicated that they spent £50 or less when visiting East Berwickshire. One quarter, (25%, n=18), of respondents indicated that they spent over £100 during their visit.

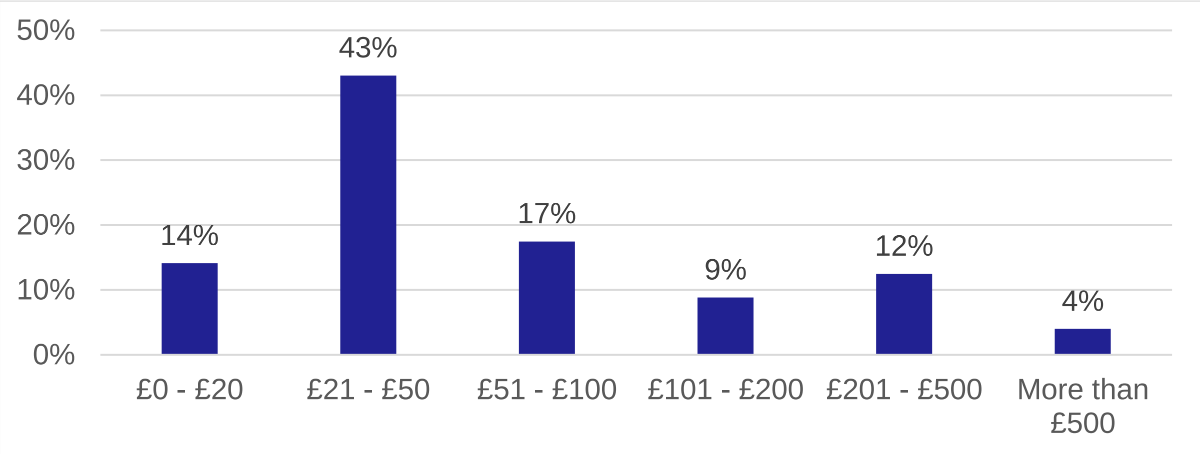

Figure 15 - Visitor Survey – Overall spend while visiting East Berwickshire

Key Attractions

Regular visitors were asked what key attractions they visit East Berwickshire for. As shown in Table 19, beaches are the key attraction of East Berwickshire for regular visitors. Over half, (53%, n=39), of regular respondents also indicated that historic sites in the area a key attraction.

Table 19 Visitor Survey – Key attractions when visiting East Berwickshire

Visitor Type	Attraction	Number	Percentage of Cases
Regular Visitor	Beaches	58	79%
	Historic Sites	39	53%
	Bars and Restaurants	27	37%
	Leisure Parks	16	22%

	Visiting family and friends	16	22%
	Other	4	5%
	Base*	**160**	

*Multiple responses were given at this question

Further to this, non-visitors were asked if they would be inclined to visit East Berwickshire for any of the key attractions listed above. Again, historic sites and the areas' beaches were noted to be the key attractions, with 77% (n=23) indicating they would be inclined to visit for historic sites and 54% (n=16) indicating that they would be inclined to visit the areas' beaches.

Travel to East Berwickshire

Regular Visitors

The regular visitors were then asked how they currently travelled to East Berwickshire. Respondents were asked to select the mode of transport that they used most regularly. Most respondents, (77%, n=56), indicated that they drove/travelled in the car to East Berwickshire. A further 17% (n=12) travelled by a combination of train and bus, 5% (n=4) travelled by a combination of train and taxi and 1% (n=1) travelled with their motorhome.

Respondents were also asked to rate the extent to which a series of issues impacted them when travelling to East Berwickshire. Figure 16 details the responses, and shows that the fewest issues were recorded for the following:

- Accessibility issues at Rail/bus interchange at Berwick-upon-Tweed – where 56% (n=30) of respondents noted it was no issue
- Safety concerns on roads on route to and approaching East Berwickshire – where 55% (n=36) of respondents noted it was no issue
- Reliability of car journey times – where 62% (n=42) of respondents noted that it was no issue

The aspects that were issues for respondents were as follows:

- Lack of direct rail service into East Berwickshire itself – where 31% (n=18) of respondents noted it was a significant issue and 38% (n=22) noted that it was a minor issue
- Lack of real time travel information at bus shelters – where 30% (n=17) of respondents noted that it was a significant issue

- Bus services to East Berwickshire – where 30% (n=16) of respondents noted that it was a significant issue and 32% (n=17) noted it was a minor issue
- Slow moving vehicles on roads on route to and approaching East Berwickshire – where 46% (n=32) of respondents noted it was a minor issue
- Congestion on the road network – where 45% (n=31) of respondents noted it was a minor issue

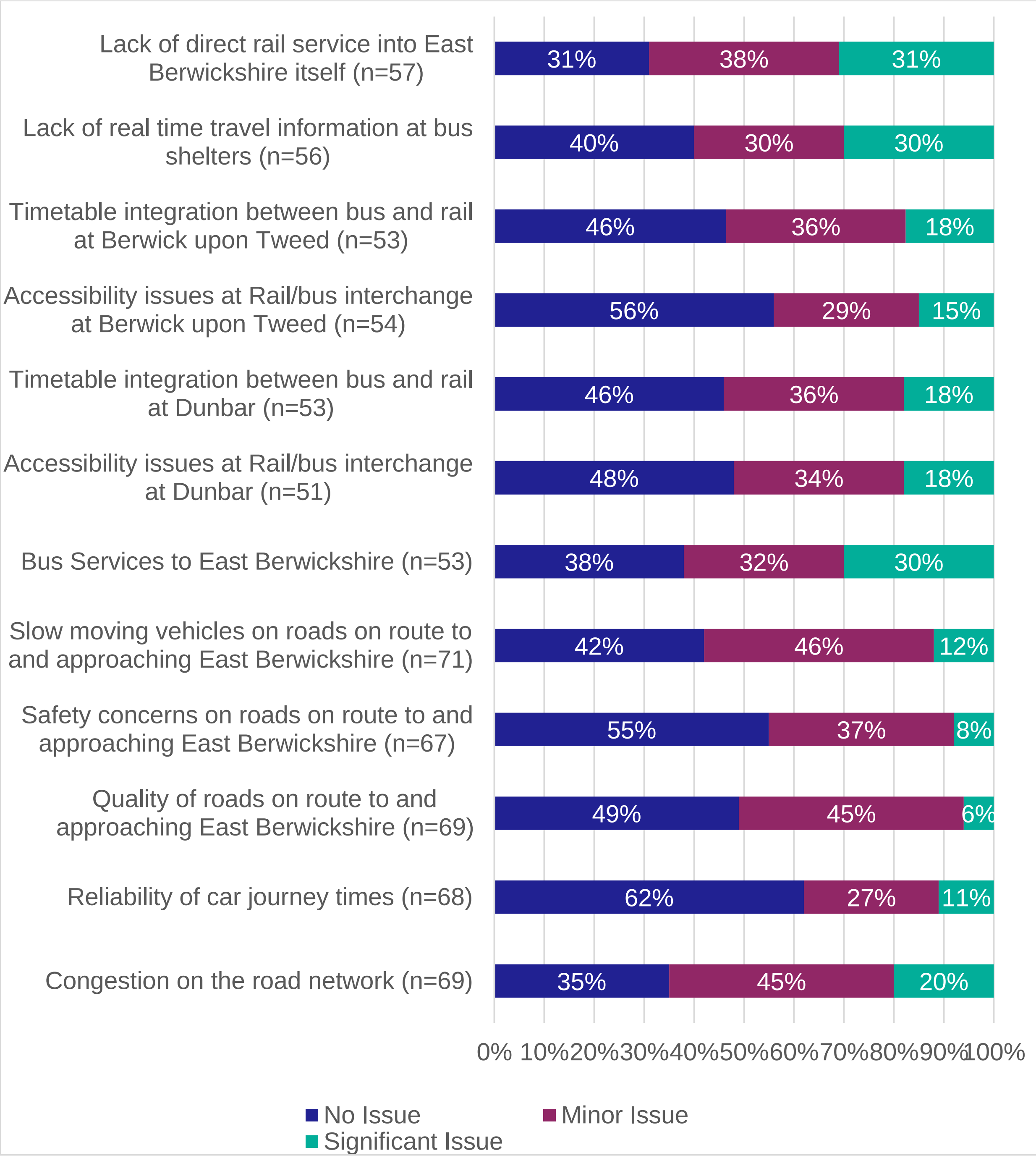

Figure 16 - Visitor Survey – Issues when travelling to East Berwickshire

Non-Visitors

Non-visitors were asked why they do not currently visit East Berwickshire more often. Respondents were asked to select all applicable reasons and Figure 17 outlines the results.

As shown, being ‘unsure what the area has to offer’ was the most common response from non-visitors (reported by 31%, n=9). Overall, 19% (n=6) of respondents indicated that that they don’t travel to East Berwickshire more often because there is no direct rail link.

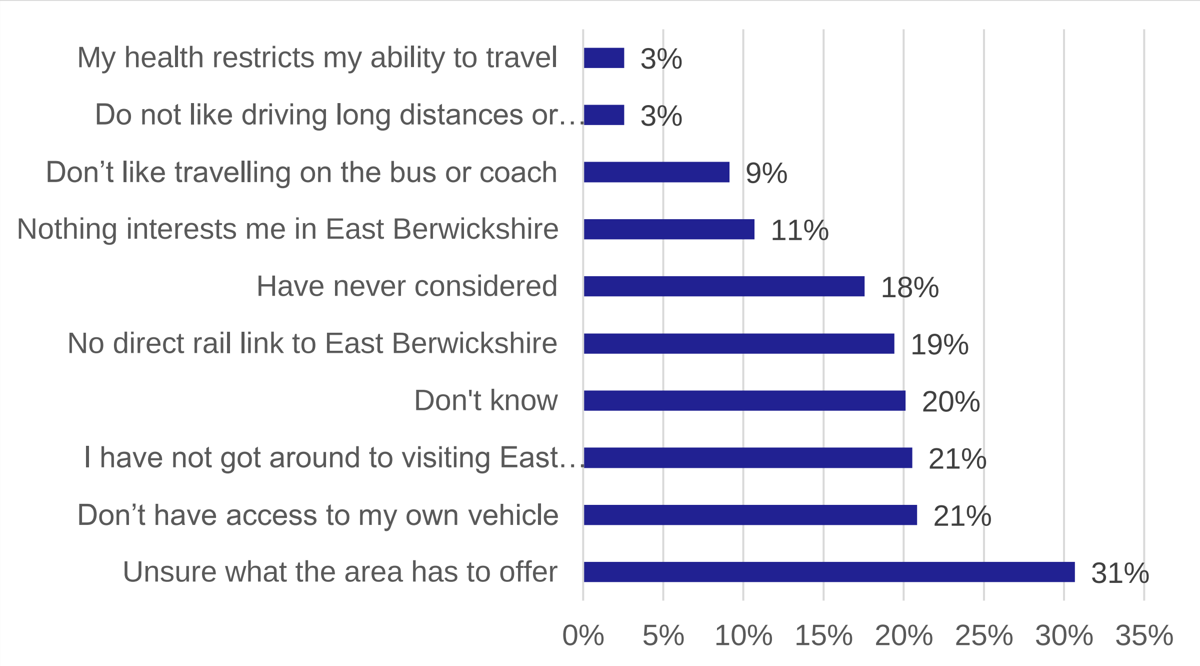

Figure 17 - Visitor Survey – Reasons for not currently visiting East Berwickshire

Anticipated Impact of a Reston Rail Link

All respondents were then asked if there was a rail link into Reston, providing direct connections to Edinburgh and Newcastle, how likely would they be to use the train to visit Reston and the surrounding local area. As shown in Table 20, both regular visitors and non-visitors noted that they would, overall, be more likely to use the train to visit the area than unlikely to.

Table 20 Visitor Survey – Likelihood of using train to visit Reston and the surrounding area

Visitor type	**Very Unlikely**	**Unlikely**	**Unsure**	**Likely**	**Very Likely**
Regular Visitor (n=73)	21% (n=15)	10% (n=7)	16% (n=12)	33%(n=24)	21% (n=15)
Non-Visitor (n=29)	17% (n=5)	7% (n=2)	28% (n=8)	38%(n=11)	10% (n=3)

Regular Visitors

Regular visitors were then asked how likely it would be that they would visit the town more often than they currently do, as a result of a new rail link. Overall, 53% (n=39) selected either ‘likely’ or ‘very likely’, indicating that the direct rail link would encourage them to visit more often. A further 13% (n=10) noted that it was ‘unlikely’ that they would visit more often and 9% (n=7) noted it was ‘very unlikely’. The other 24% (n=18) noted that they were ‘unsure’.

Non-Visitors

Non-visitors were asked if there was a direct rail link, and they were to use it to travel to Reston and the local area, how long would they expect to spend in Reston and the local East Berwickshire area. As shown, the largest proportion of respondents (42%, n=12) indicated that they would visit East Berwickshire for a day trip.

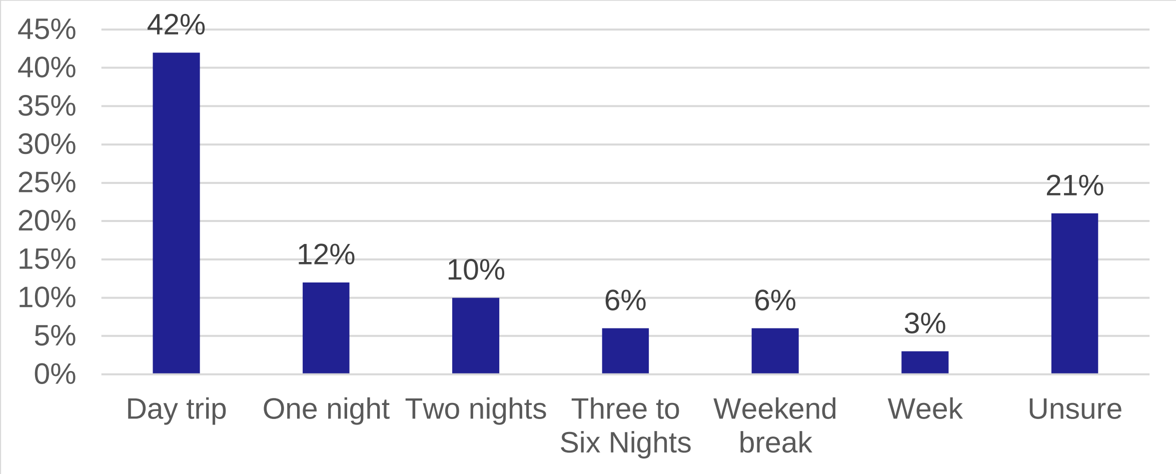

Figure 18 - Visitors Survey – Expected duration of stay in Reston given rail link for non-visitors

These respondents were then asked how often they would visit the town if there was a direct rail link. Figure 19 shows that ‘a few times per year’, ‘once per year’ and ‘irregularly’ were each selected by approximately one quarter of respondents.

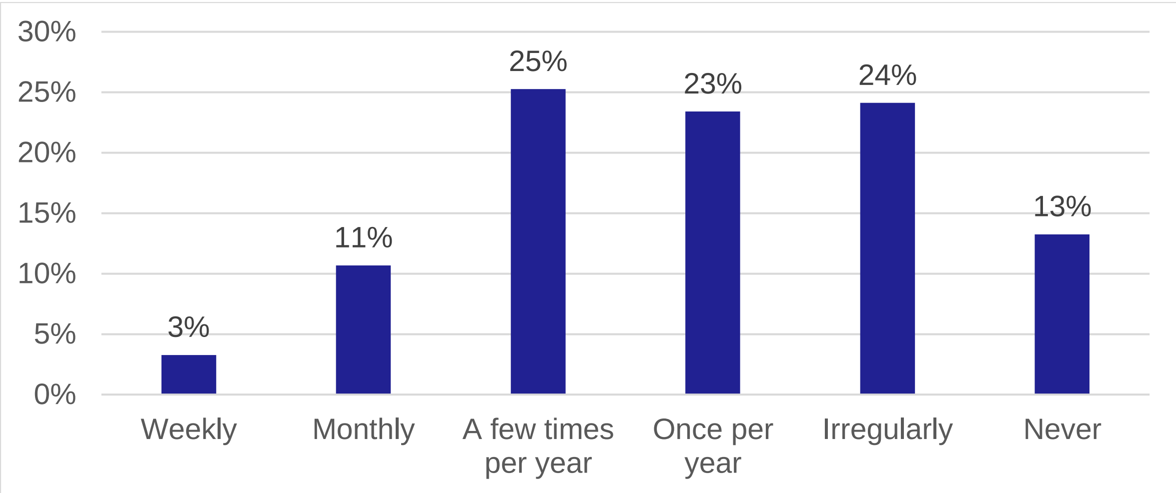

Figure 19 - Visitors Survey – Frequency of visit to Reston given rail link for non-visitors

Business Survey Results

Introduction

As noted previously, a total of 100 businesses responded to the survey. As such, the percentages quoted in this section can be taken also as the total number of businesses. Data in this chapter is unweighted.

Awareness of the New Line

The businesses were asked whether they were aware of the scheduled opening of Reston Station before receiving notification of this survey. Over two thirds (68%) of the respondents indicated that they were aware compared to 32% who said that they were not.

Just under half of the respondents (46%) noted that Reston would be the closest station on the East Coast Main Line to their business. Of the 47% who indicated that one of the other stations would continue to be closest, 46% indicated that Berwick-upon-Tweed would continue to be their closest station, with only one respondent noting that Dunbar Station would be their closest. A further 7% of respondents were unsure which station on the East Coast Main Line would be closest to their business.

Business Location

The majority of respondents, 78%, noted that their business had been operating at their current location for more than 10 years. Only 5% of businesses noted that they had been in the area less than 2 years.

The 21 respondents who indicated that they had been in their current location 10 years or less were asked to select a statement to describe their organisation's situation with respect to its current location. Nine respondents indicated that they had set up a new business at the location indicated and three respondents indicated that this location was opened up as part of a business expansion. The other nine respondents indicated that their business had relocated from elsewhere, with five respondents relocating from elsewhere in the Scottish Borders.

The same 21 respondents were asked whether the announcement regarding the opening of the Reston station had been a factor in their decision to begin operating in the area. Most respondents (90%, n=19) stated 'No, this was not a factor in locating the business here', with the other 10% (n=2) stating 'Yes, this was a fairly minor factor in locating the business here'.

Advantages/Disadvantages to operating in the area

All of the businesses were presented with a series of potential advantages/disadvantages for operating in the area. They were asked to indicate whether they considered their current location offers them a competitive advantage, a competitive disadvantage or neither, relative to their competition. The results of this are shown in Figure 20.

As shown, the element that scored highest in terms of being an advantage in the area was ‘Pleasant Area to Work In’, with 90% of respondents indicating that this was an advantage. ‘Good Road Links to the Site’ and ‘Easy to Park/Deliver’ were also indicated to be advantageous by businesses, with 73% and 77% selecting advantage respectively.

For several of the elements shown, the largest proportion of respondents selected neither advantage nor disadvantage. This included ‘Low Rent’, ‘Lack of Competition in the Local Area’, ‘Proximity to Customer Markets’, ‘Wide Labour Catchment’ and ‘Receive State Incentives/Assistance’.

Being close to suppliers was a disadvantage to operating in the area for 30% of respondents, however, 34% deemed this to be an advantage. Around a quarter (26%), noted that ‘Good Public Transport Links to the Site’ was a disadvantage, and 19% noted that the ‘Wide Labour Market’ was a disadvantage.

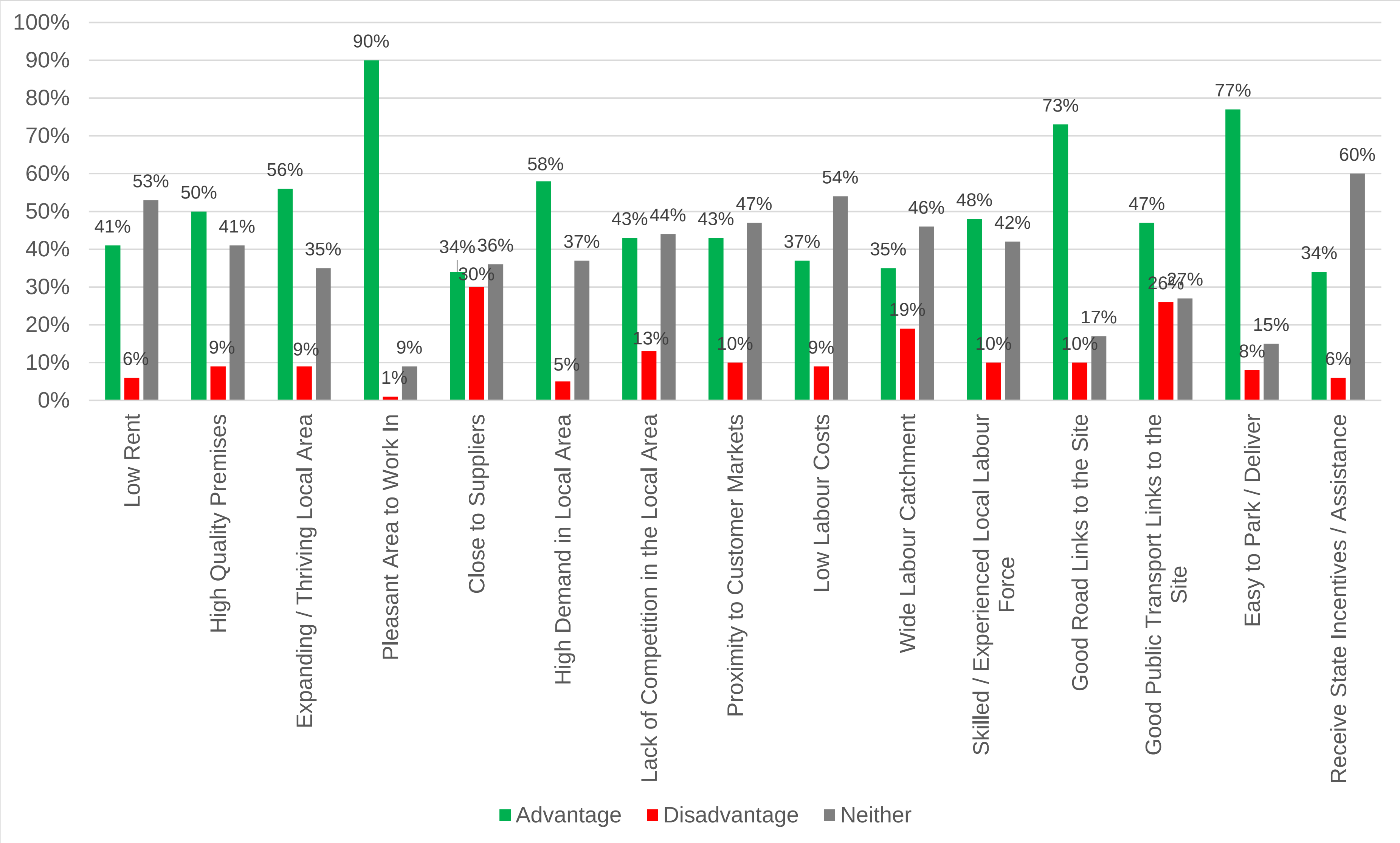

Figure 20 - Business Survey - Potential Advantages/Disadvantages to Operating in the Area

Respondents were then asked what the **main** advantage and disadvantage was of operating in the area. In total, 100 open-ended comments were submitted to this question. These responses have been thematically grouped and the following were identified at the main advantages of operating in the area:

- High quality of life in the area. Nice, affordable place to live with a good work/life balance (31 comments)
- Good accessibility to other towns which increases the customer and supplier base (24 comments)
- Few competitors (17 comments)
- Operating and existing in a small, local community leading to a good reputation (10 comments)

Some of the other advantages mentioned were operating across a large geographical area; new, state-of-the-art sites; and increasing local population being good for local business.

The main disadvantages of operating in the area were also grouped and the following main disadvantages were identified:

- Poor transport links, including a lack of public transport and poor quality of roads (22 comments)
- Limited business opportunities due to rural location (21 comments)
- Difficult to recruit staff / attract and retain people in the area (12 comments)

The other disadvantages mentioned included lack of available equipment; poor digital connections; high fuel costs; fewer people shopping locally; and low population numbers. A further 11 respondents noted that they could not think of any disadvantages.

Respondents were asked whether they had any plans to move from, expand or contract their current site. The majority, (90%), indicated that they had no plans and would be staying the same as at present. Just 6% of respondents noted that they planned to expand operations at their sites, and a further 3% indicated that they planned to relocate. These three respondents were asked where they planned to relocate to. One noted that they were relocating to a bigger premise in the same area, one noted that they were relocating elsewhere in the Scottish Borders, and the final respondent noted that they did not know where they would be relocating to yet.

Employees

Respondents were asked how many people their business currently employed at their present location, broken down into full-time, part-time, temporary/seasonal and in total. Figure 21 presents the breakdown of employees among the survey respondents. As shown, over half of the businesses (57%) indicated that they employed between 1 and 5 full-time employees, while 41% employed between 1 and 5 part-time employees. Around three quarters (73%) indicated that they did not employ temporary/seasonal workers. Only one organisation indicated that they employed over 100 people full-time.

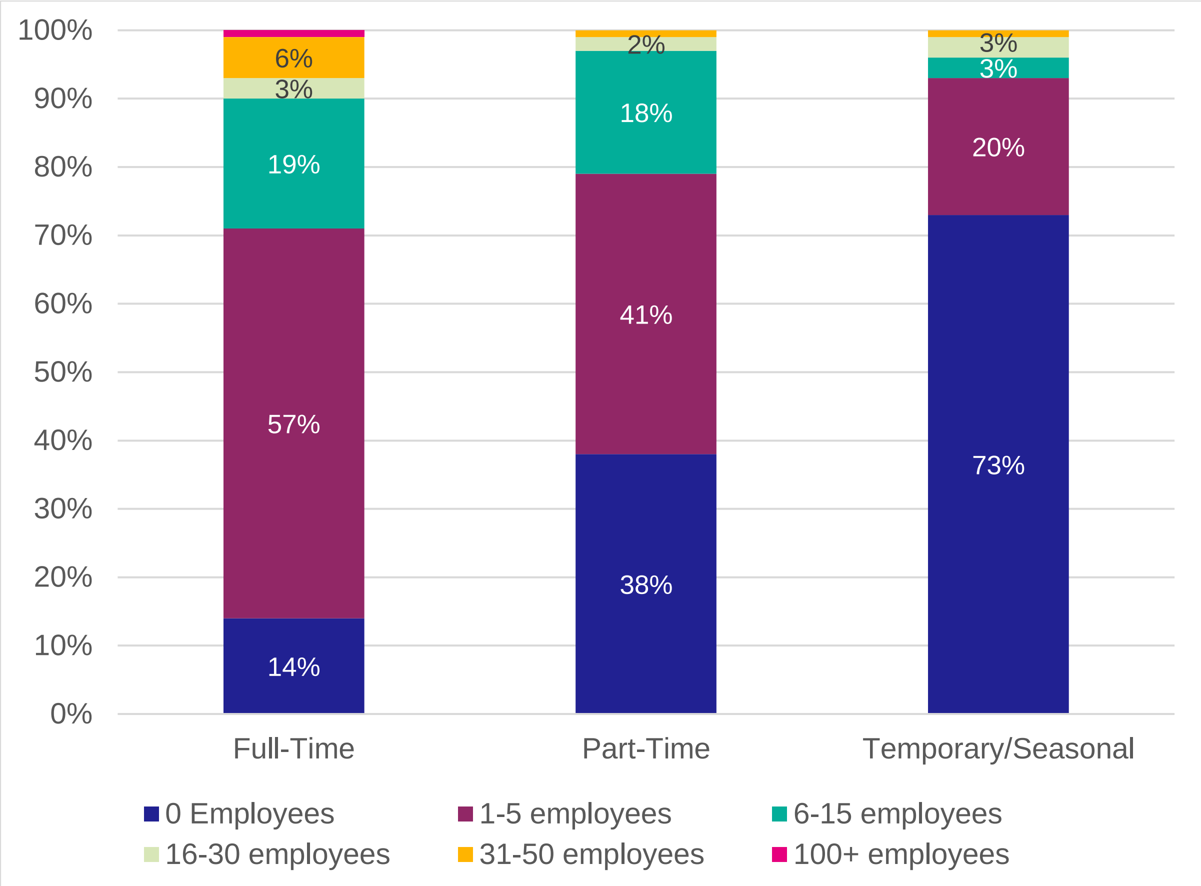

Figure 21 - Business Survey - Employee Breakdown

The total number of employees recorded from all respondents, taken from the indicated total number of employees per respondent, was 1,250 and the average number of employees per business was 13.

Respondents were then asked to indicate what the main mode of travel to work was for their employees. As shown in Figure 22, 53% of the respondents indicated that over 75% of their employees travelled to work by car. Five percent of respondents indicated that some of their employees travelled by bus and only one percent of respondents indicated that some of their employees travelled by rail.

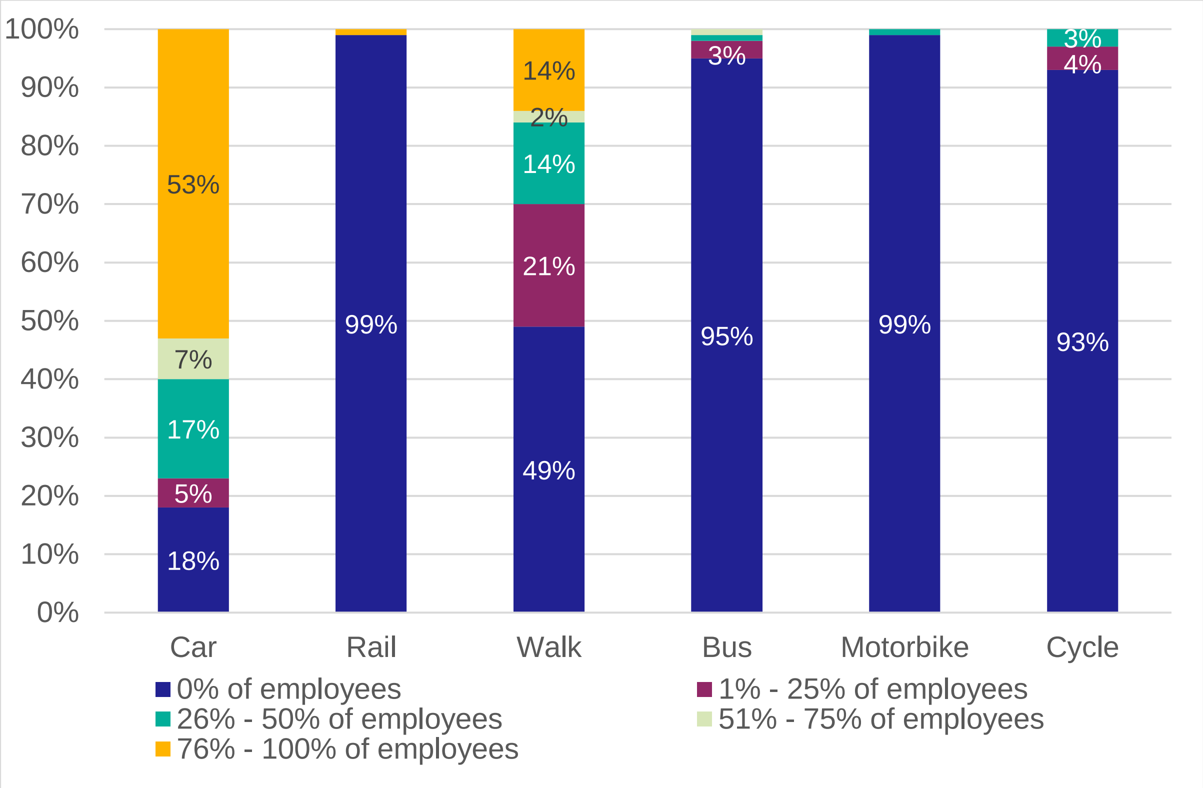

Figure 22 - Business Survey – Employee main mode of travel to work

Respondents were then asked whether their staff travel in the course of work (e.g., to meetings or to make deliveries), and if so, where their staff travelled to and how often. Overall, 43% of businesses indicated that yes, their staff travel in the course of work, and Figure 23 details the proportions travelling to each of the locations asked about. As shown, the Scottish Borders was the most popular location, with 88% (n=38) of respondents indicating that their staff travel there. This was followed by the North of England (74%, n=32), Edinburgh (47%, n=20) and East Lothian (42%, n=18).

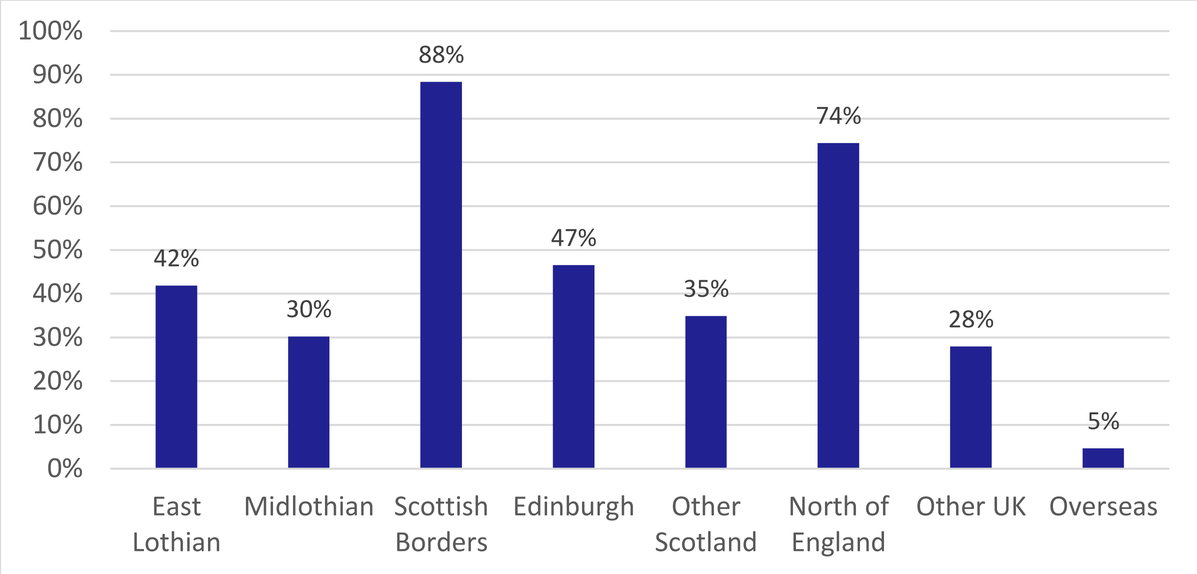

Figure 23 - Business Survey – Staff travel in the course of work

The same group of respondents (n=43) were asked to indicate the frequency of travel of staff to each of the locations. As shown in Figure 24, 32% (n=12) indicated that their staff travel to the Scottish Borders over 20 times a month. Of the respondents who indicated that their staff travel to East Lothian, 56% (n=10) travel more than five times a month. Similarly, 53% (n=17) of those who travel to the North of England do so more than five times a month.

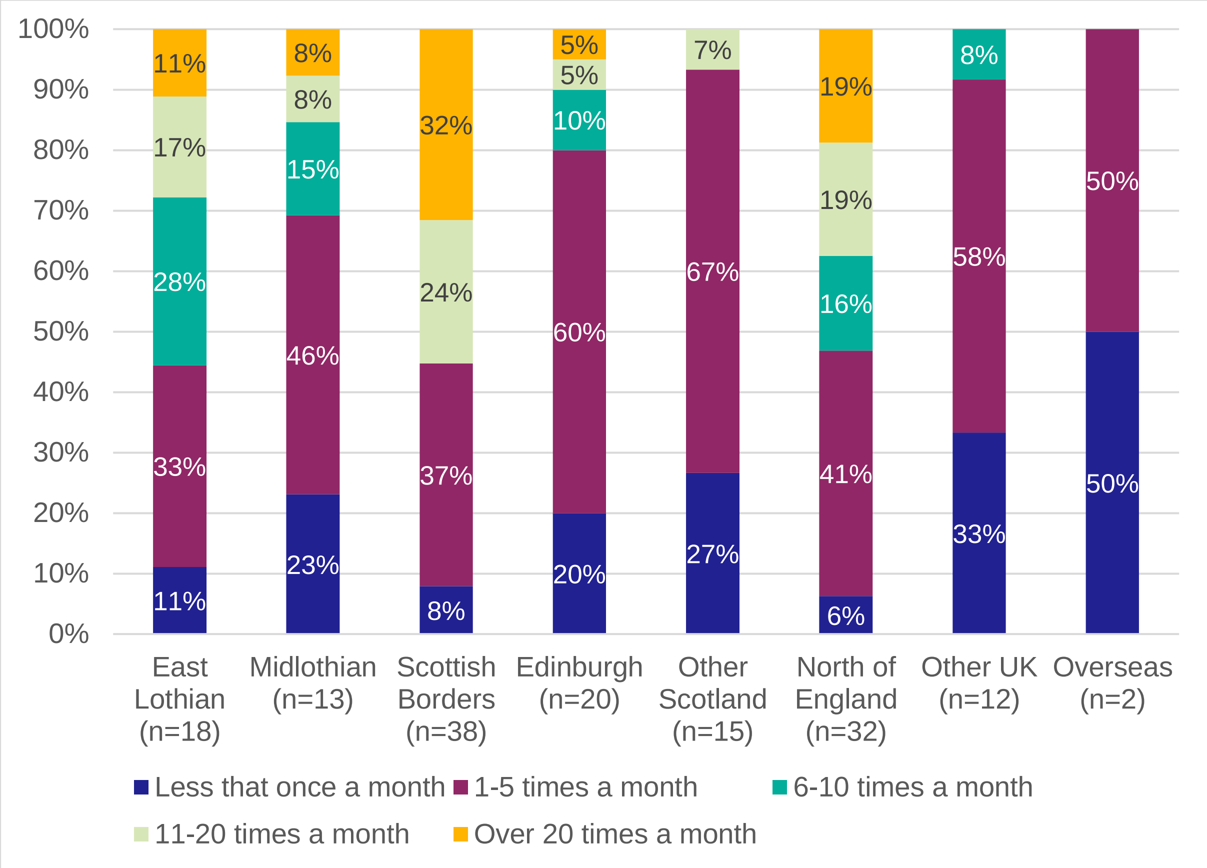

Figure 24 - Business Survey – Frequency of staff travel in the course of work

Markets Served and Suppliers

Location of Key Markets

Respondents were asked, in terms of their outputs, which geographical markets they currently serve from their indicated location. To do this, they were asked to give an approximate percentage by area shown below, with their answers summing to 100%. The results of this question are presented in Figure 25 below.

As shown, the majority of business was carried out within the Scottish Borders, with 28% of respondents indicating that over 75% of their business output is there. After the Scottish Borders, the North of the England had the next largest share with 60% of respondents indicating that they have at least 1% of their business output going there. Otherwise, the respondents indicated that their business outputs are fairly well spread across the locations listed, as shown by the percentage of businesses with between 1% and 25% of business outputs in each of the locations.

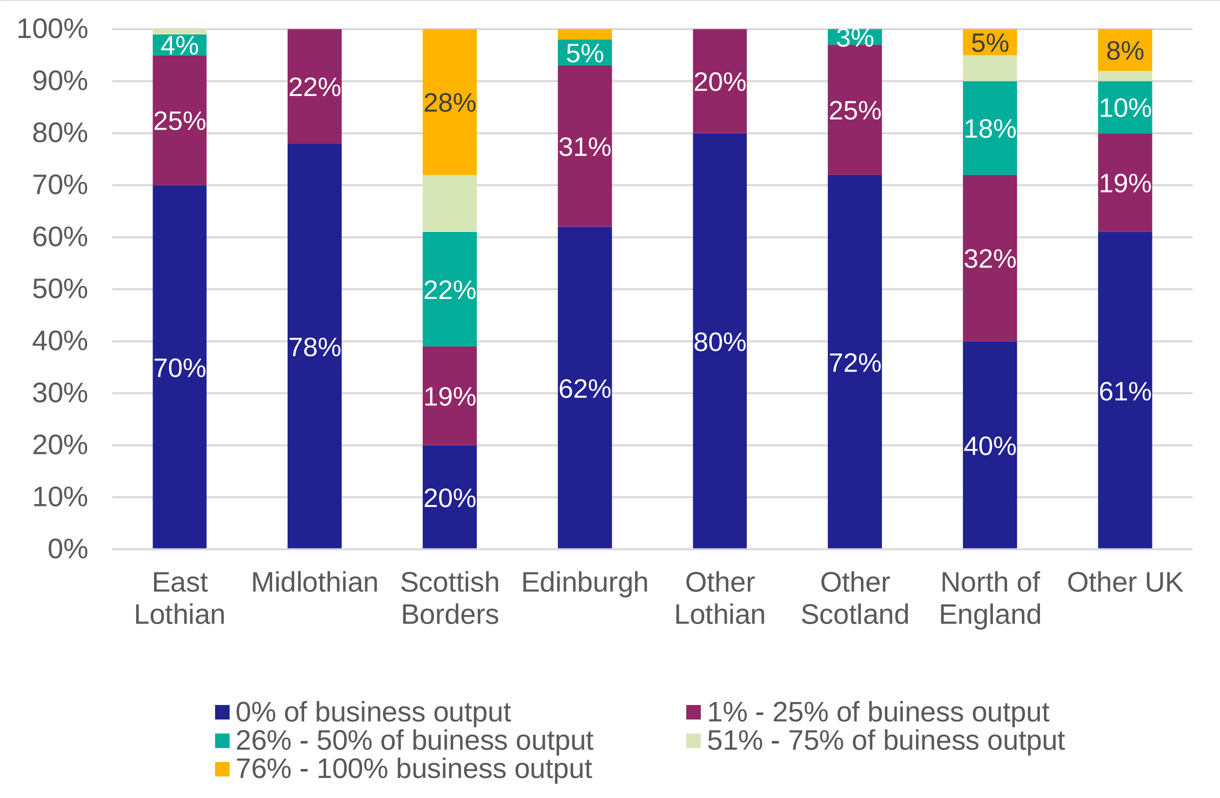

Figure 25 - Business Survey – Location of key markets

Overall, 13% (n=13) of the respondents indicated that a proportion of their business output was overseas. Four of these respondents noted that they shipped worldwide and didn't specify a specific location. The key markets listed by the other nine respondents were America, Germany, Netherlands, Spain, France and Switzerland.

Competitors Location

Respondents were asked where their main competitors were located. Again, they were asked to provide a percentage breakdown of the competitors as per the locations shown in Figure 26.

Similar to the previous question, respondents indicated that their main competitors were largely in either the Scottish Borders or the North of England, with 34% of respondents noting that over 75% of their competition was in the Scottish Borders, and 25% of respondents noting over 75% of their competition was in the North of England.

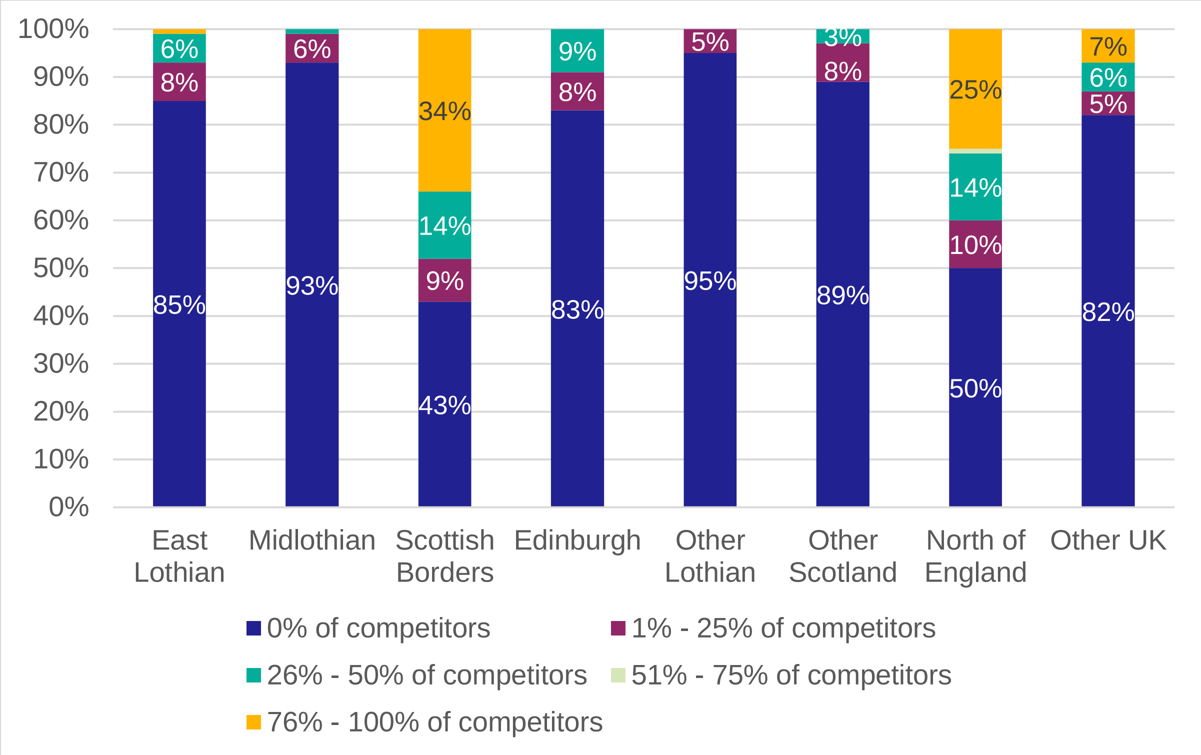

Figure 26 - Business Survey – Location of competitors

Suppliers Location

Using the same format as the previous two questions, respondents were asked to indicate the location of their suppliers. As shown in Figure 27, 18% (n=18) of respondents indicated that over 75% of their suppliers are in the North of England. Another 15% (n=15) of respondents noted that over 75% of their suppliers were located elsewhere in the UK.

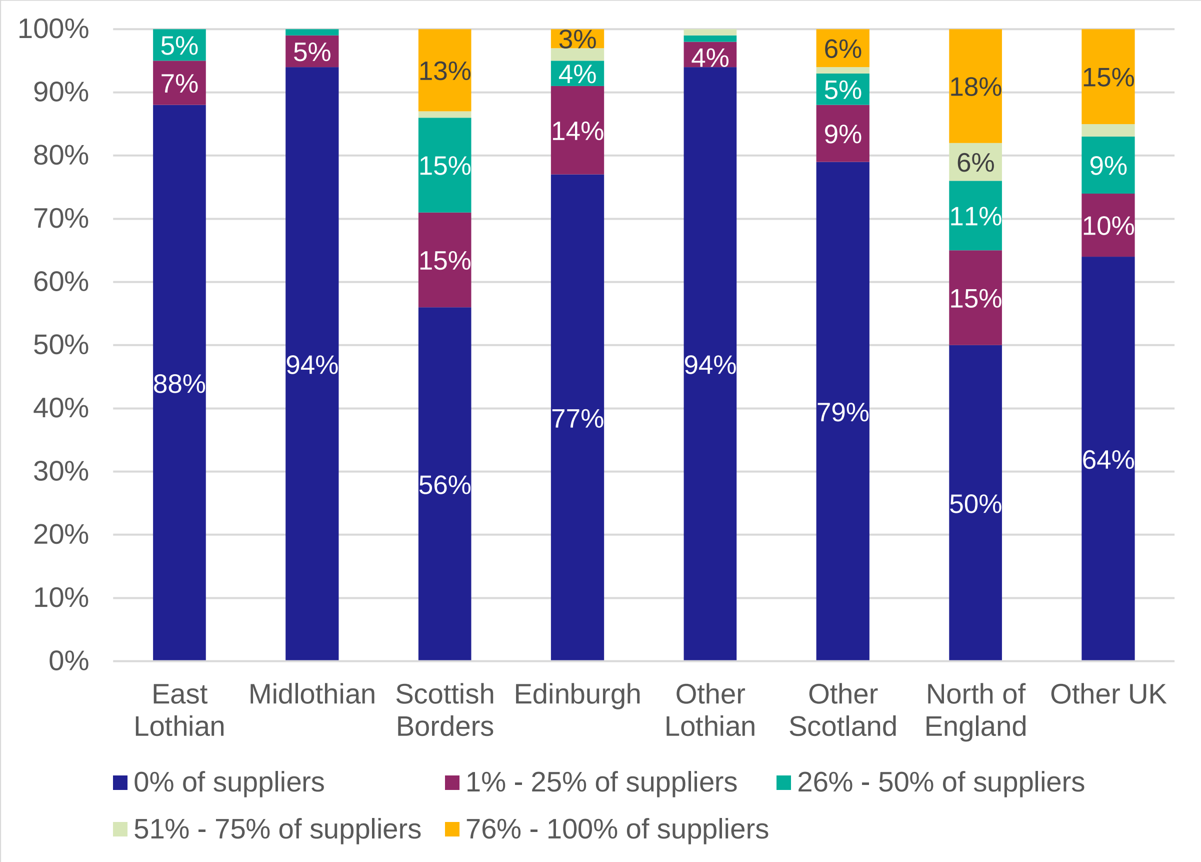

Figure 27 - Business Survey – Location of suppliers

Recent Business Conditions

Perceptions of Business Conditions

Respondents were asked to indicate their level of satisfaction with current business trading conditions. As shown in Figure 28, the largest proportion of respondents (39%) noted that their satisfaction was very high. A further 30% noted that that current business trading conditions were good. Only 3% indicated that business conditions were very poor.

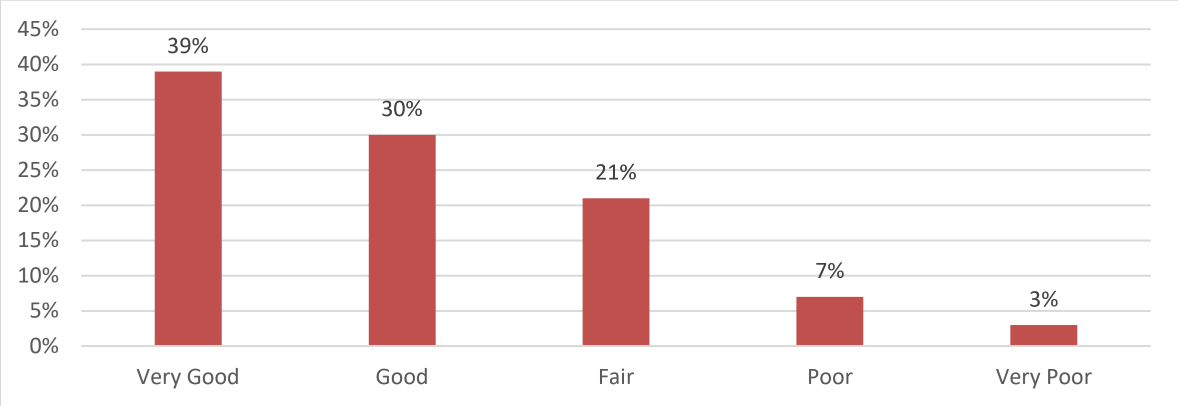

Figure 28 - Business Survey – Satisfaction with current business trading conditions

Respondents were then asked to consider what had influenced business conditions. As shown in Figure 30, 83% (n=83) of respondents noted that COVID-19 had influenced business conditions. Changing market trends was the only other option that more respondents felt had influenced business conditions than had not.

Nine respondents highlighted ‘other’ factors that had influenced business conditions, including:

- Rise in fuel prices
- The economy / inflation / rising cost of living / less disposable income
- The weather
- The war in Ukraine
- Not being located near attractions
- Rise in staycations

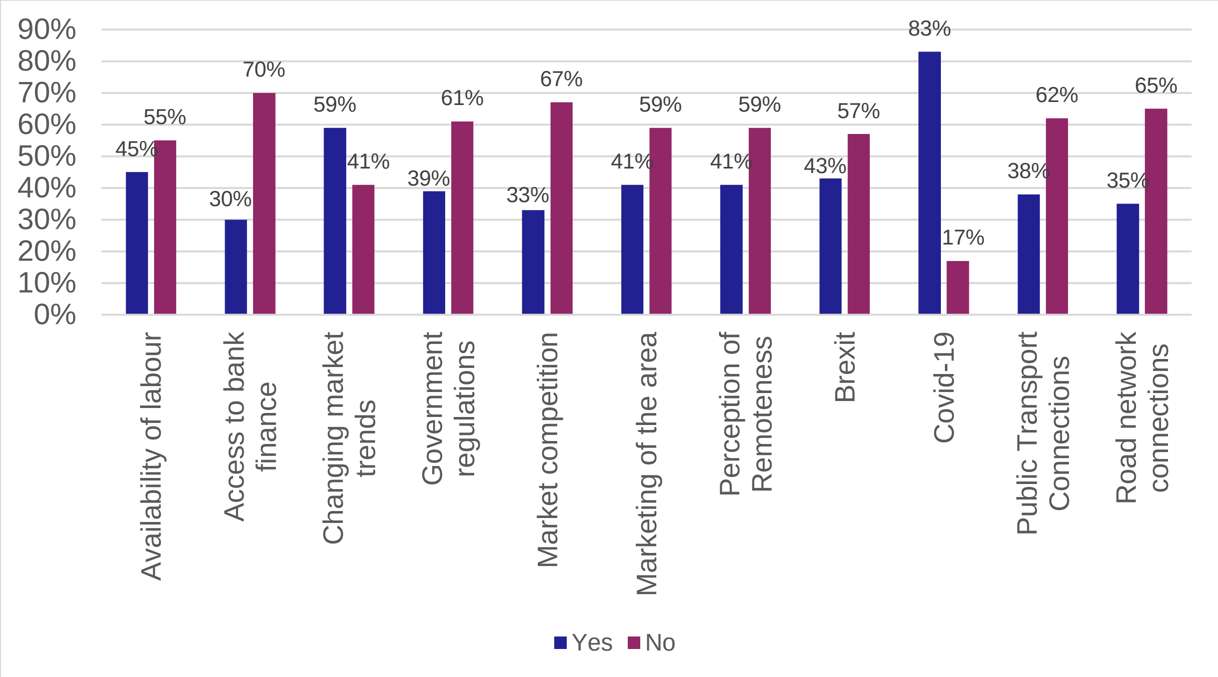

Figure 29 - Business Survey – Influences on business conditions

Thereafter, respondents were asked to indicate, from a list provided, what the main factor had been in influencing recent business conditions. Exactly half (50%) of the respondents selected COVID-19. Under 10% of the respondents selected each of the other options, and 13% selected 'other'. Those that selected other generally repeated the other factors from the previous question, with the addition of product quality and the price of fertiliser.

Staffing

Respondents were asked to indicate how easy, or otherwise, was it for them to recruit suitable staff. As shown in Figure 30, respondents indicated that it was challenging to recruit suitable staff, with 27% (n=27) noting that it was 'difficult' and 20% (n=20) noting that it was 'very difficult'.

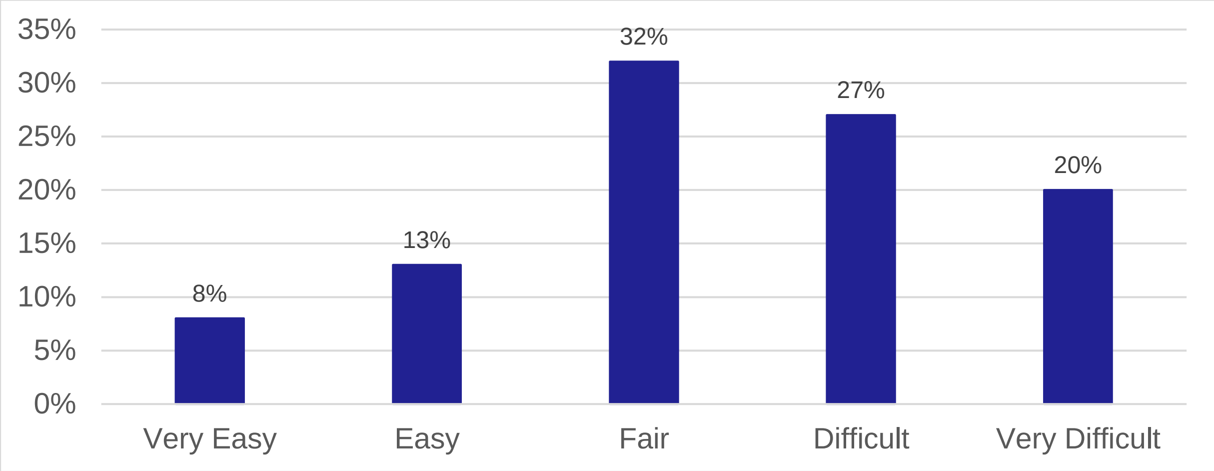

Figure 30 - Business Survey – Ease of recruiting staff

Respondents were then asked what had happened to their employee levels over the last three years. Around half (51%, n=51) noted that their employee levels had remained stable over the last three years. Meanwhile, 21% (n=21) and 20% (n=20) of respondents indicated that staff levels had increased slightly and decreased slightly respectively.

Investment

Respondents were asked how the level of investment in their business has changed compared to the previous financial year at their current site. As shown in Figure 31, the majority (60%, n=60) indicated that their level of investment has remained stable. Overall, a higher proportion of respondents noted that their business's investments increased rather than decreased.

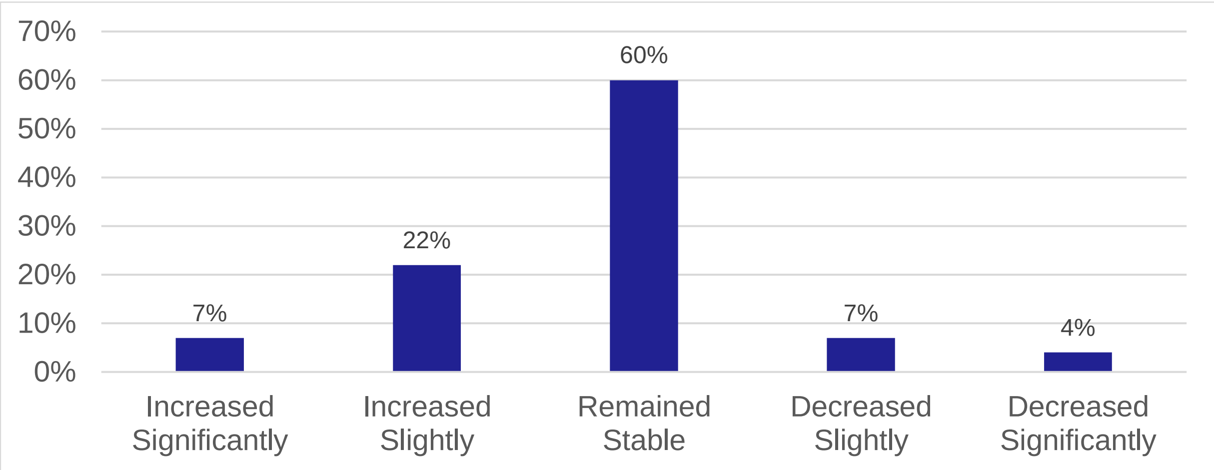

Figure 31 - Business Survey – Changes in investment

The respondents who indicated that there had been a change in their level of investments were then asked if this change had been influenced in any way by the forthcoming opening of Reston station. Most (95%, n=38) said that the opening of the station had had no influence while the other 5% (n=2) indicated that it had a slight influence.

Turnover

The respondents were asked to state their annual turnover in the last financial year at their current site. While 43% (n=43) of respondents said that they did not know/would rather not say, the business turnover of the remainder was fairly mixed across the options as shown in Figure 32.

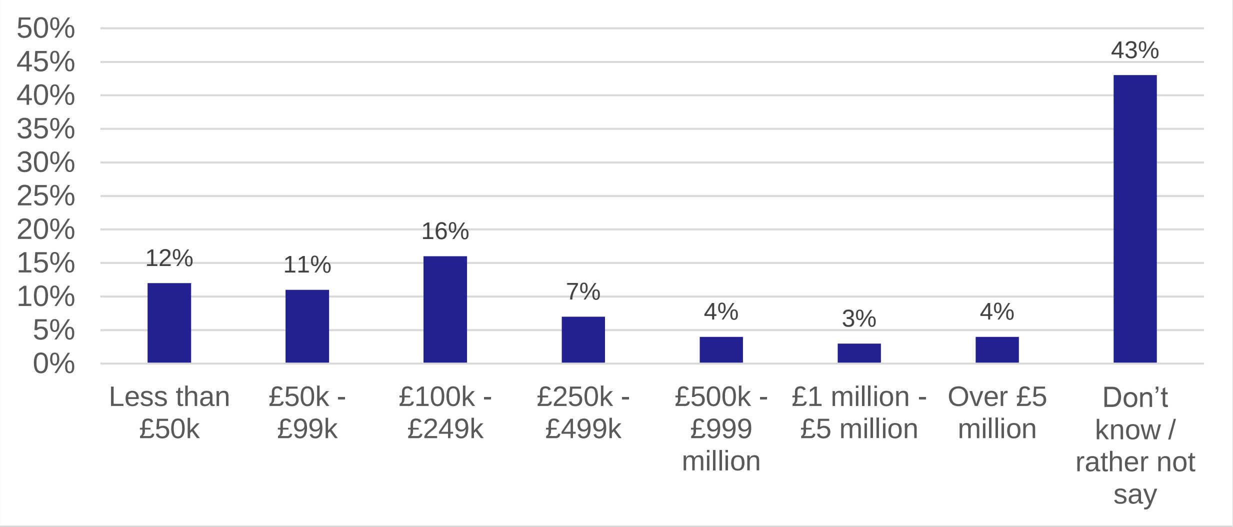

Figure 32 - Business Survey - Annual turnover

Just under two thirds (60%, n=60) of the respondents noted that the current annual turnover had changed compared to two years ago. Of these respondents, 60% (n=36) noted that it had increased and the other 40% (n=24) noted that it had decreased.

Anticipated Impact of Reston Rail Link

The respondents were asked to think about the impact that the opening of Reston station may have on their business in relation to the statements in Figure 33. Generally, respondents disagreed more with the statements than agreed.

The statements that the respondents agreed the most with were:

- The new station at Reston will enable us to expand our local business – 24% (n=25) of respondents either strongly agree or agree with this statement

- When Reston station is open, we will be able to expand our customer base – 31% (n=29) of respondents either strongly agree or agree with this statement
- Reston station will lead to an increase in our turnover – 28% (n=26) of respondents either strongly agree or agree with this statement

The statements that the respondents disagreed most with were:

- Reston station will make it more difficult to retain staff – 86% (n=83) of respondents either disagree or strongly disagree with this statement
- When Reston station opens, we will need to take on more staff – 85% (n=81) of respondents either degree or strongly disagree with this statement
- Having access to Reston station will mean we will increasingly use suppliers from different areas – 82% (n=78) of respondents either degree or strongly disagree with this statement
- We will rely less on local customers when Reston station opens – 81% (n=7) of respondents either degree or strongly disagree with this statement

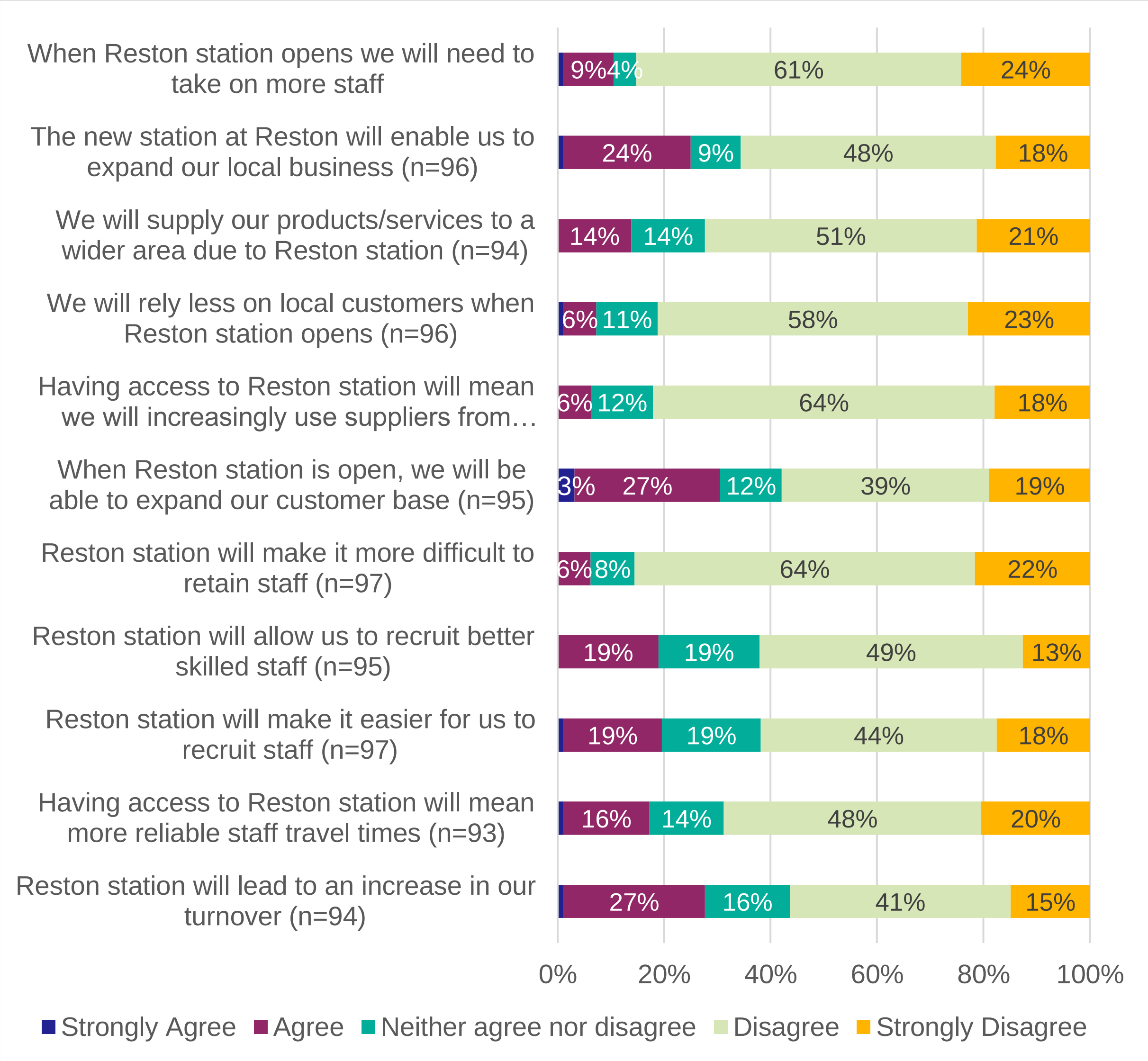

Figure 33 - Business survey - Impact of Reston station

Further to this, respondents were asked to provide an estimate of the potential impact of the opening of Reston station in terms of:

- Turnover and customer base
- Employment levels at their current site

As shown in Table 21, the majority of respondents indicated that they believe there will be no impact on either turnover/customer base or employment levels. Where respondents felt there would be an impact, it was generally felt this would be positive in nature, although, respondents suggested that there would be more impact on turnover/customer base than employment levels. Overall, 42% (n=42) of respondents believe that there will be some positive impacts of some degree to turnover/customer base compared to 21% (n=21) believing that there will be a positive impact on employment levels.

Table 21 Business Survey – Impact of Reston station on turnover and customer base, and employment levels

Impact	**Turnover and customer base (No.)**	**Turnover and customer base (%)**	**Employment levels at their current state (No.)**	**Employment levels at their current state (%)**
High Positive Impact (>10%)	3	3%	2	2%
Medium Positive Impact (6% to 10%)	17	17%	6	6%
Low Positive Impact (1% to 5%)	22	22%	13	13%
No Impact (0%)	55	55%	73	73%
Low Negative Impact (-1% to -5%)	2	2%	6	6%
Medium Negative Impact (-6% to -10%)	1	1%	-	-
High Negative Impact (<10%)	-	-	-	-

Counterfactual Survey Results

Introduction

As outlined above, 101 respondents completed the Counterfactual Survey Questionnaire. Results in this section are weighted to be representative by age.

Household Profile

Respondents were asked to indicate how many adults and children were permanent residents in their household. Over three quarters (69%, n=70) of respondents indicated that there were two permanent adults in their household, with two thirds (66%, n=67) also indicating there were no children in the household.

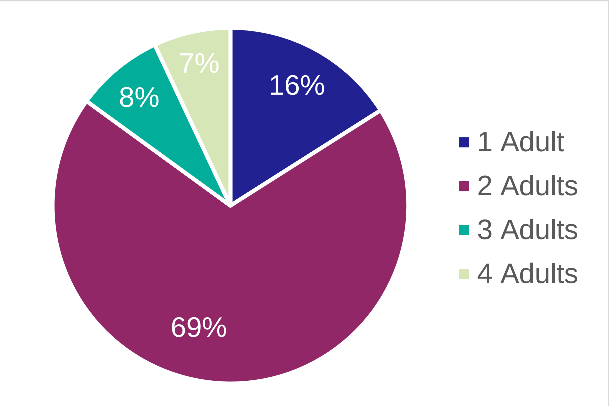

Figure 35a - Counterfactual Survey – Household breakdown

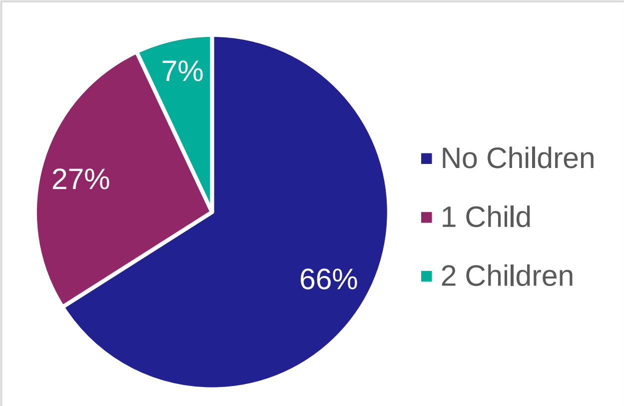

Figure 34b - Counterfactual Survey - Household breakdown

Respondents were asked to indicate their working status. Table 22 below shows that 31% (n=31) worked full-time, while a further 23% (n=23) worked part-time. In addition, 31% (n=31) were retired and 15% (n=15) were unemployed.

Table 22 Counterfactual Survey – Employment breakdown

Employment Status	Number	Percentage
Full time employment	31	31%
Part time employment	23	23%
Unemployed	15	15%
Retired	31	31%
Total	**101**	**100%**

Respondents were asked to indicate how many cars or vans were owned or available to their household. Table 23 below outlines the number of cars or vans per household of those who specified this. As shown, around two thirds of respondents (65%, n=55) indicated that they owned, or had access to, one car.

Table 23 Counterfactual Survey – Household car/van availability

Number of Cars	Number	Percentage
1	55	65%
2	20	24%
3	6	7%
4+	3	3%
Total	**85**	

Thereafter, respondents were presented with a series of statements regarding how dependent their household was on the use of a car. As shown in **Error! Reference source not found.**, the largest proportion of respondents (45%, n=46) noted that a car was essential for their everyday needs. Only one respondent (1%) noted that they did not own a car and were not dependent on car travel.

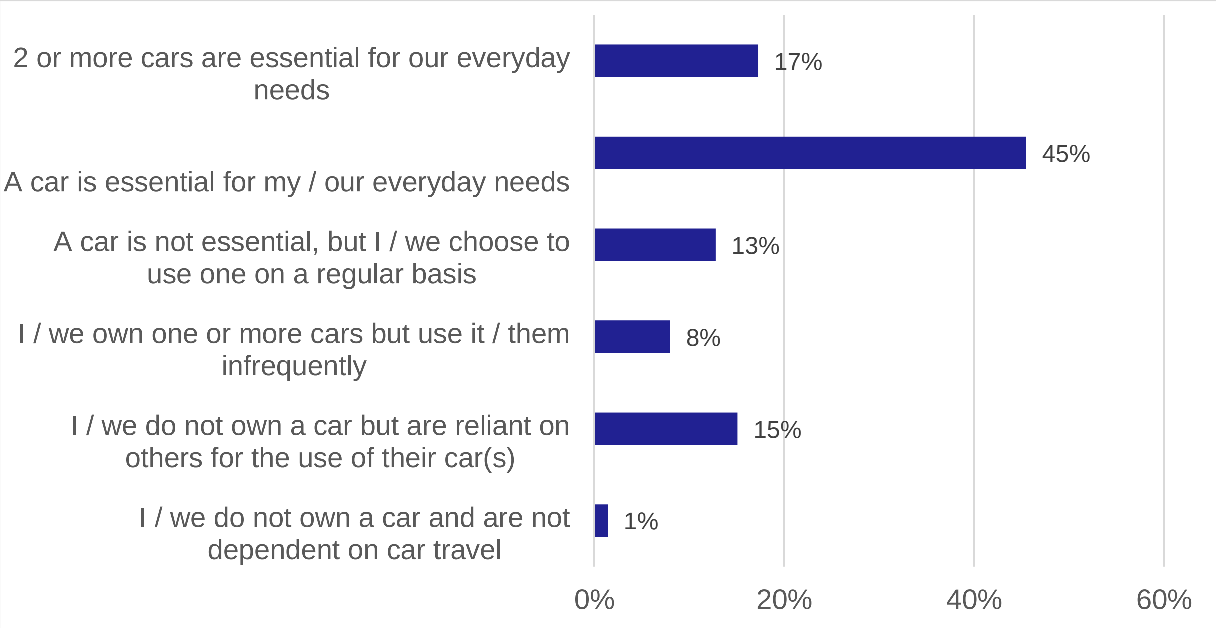

Figure 36 - Counterfactual Survey – Household dependency on car use

Current Public Transport

Respondents were asked how satisfied they were with current public transport services with respect to their household's travel needs. As shown in Figure 37, more respondents indicated that they were dissatisfied (39%, n=40) than satisfied (28%, n=28). Only 6% (n=6) of respondents noted that there were no public transport services where they live.

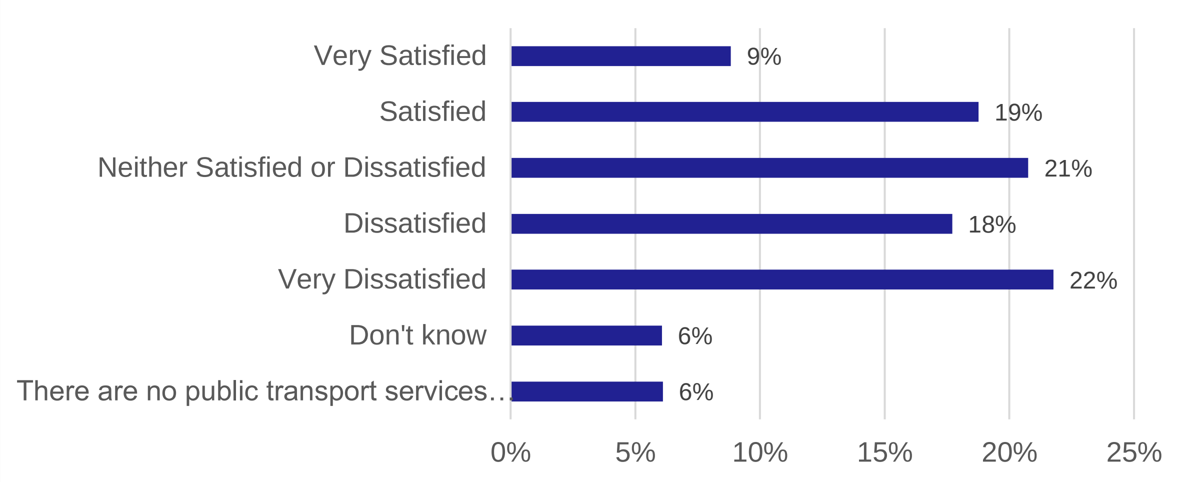

Figure 37 - Counterfactual Survey – Satisfaction with current public transport services

Respondents were then asked to indicate the main factors which influenced their satisfaction with public transport. It should be noted that respondents could select all applicable factors and, as such, the percentages outlined in Figure 38 represents the percentage of cases and do not equal 100%. The most influential factor was ‘frequency’ of services with 86% (n=59) of respondents selecting this, closely followed by ‘availability of public transport services’ which was selected by 86% (n=58) of respondents. Of the 17% (n=11) of respondents who selected ‘other’, six noted that ‘cost’ was an influential factor regarding their satisfaction with services. The closest train station being far away, poor accessibility, lack of bus services and timetables that do not suit were also noted as factors.

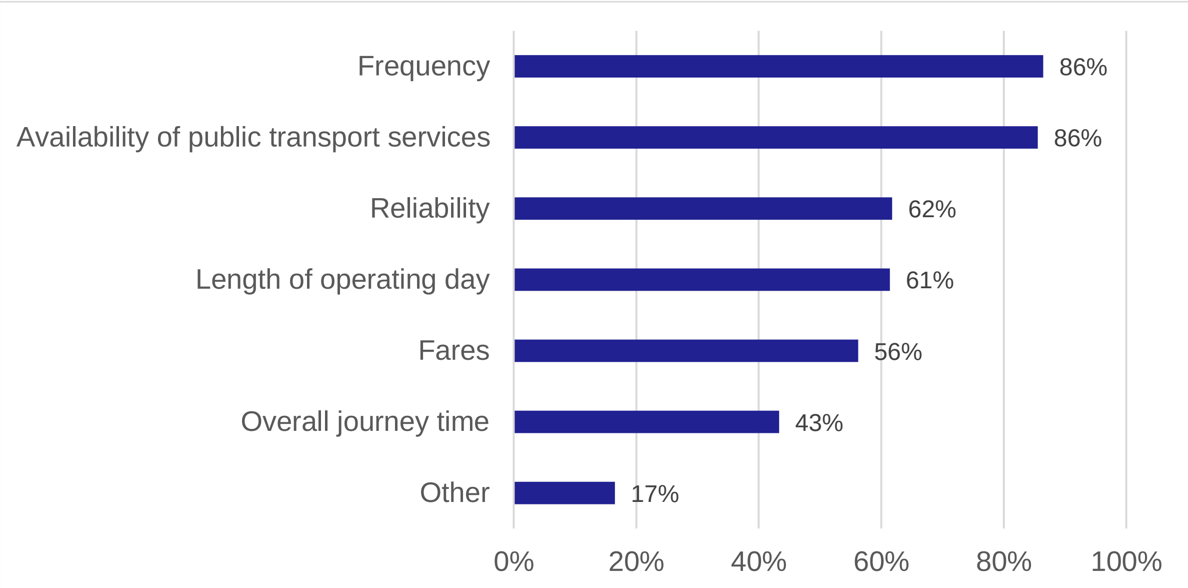

Figure 38 - Counterfactual Survey – Main factors that influence satisfaction with public transport

Around three quarters (74%, n=75) of respondents noted that if public transport services in their area improved their household would be more likely to use them. These respondents were asked to select all of the improvements they would make from the list shown in Figure 39 (again, the percentages shown are the percentages of cases). Nearly all respondents at this question, 95% (n=71), indicated that they would improve the availability of public transport services. Over three quarters of respondents also selected frequency, reliability and length of operating day. Of those who selected ‘other’, the number of destinations/connections and improving the A7 to reduce journey times were listed.

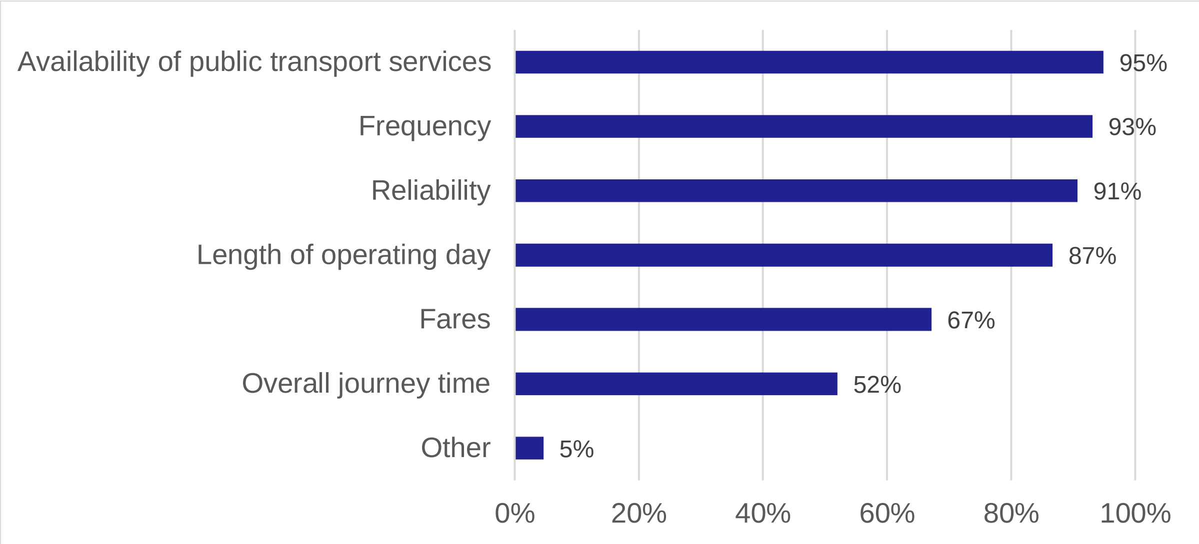

Figure 39 - Counterfactual Survey – Desired improvements to public transport

Travel to Work and Education

Of the 55 respondents who indicated they were in work/education, around two thirds (65%, n=36) travelled to a fixed place of work/education entirely, 18% (n=10) had flexible arrangements and so partially worked/learned from home and partially travelled to a fixed location, while 16% (n=9) entirely worked/learned from home. The location of where respondents travelled to work/education are shown in Figure 40.

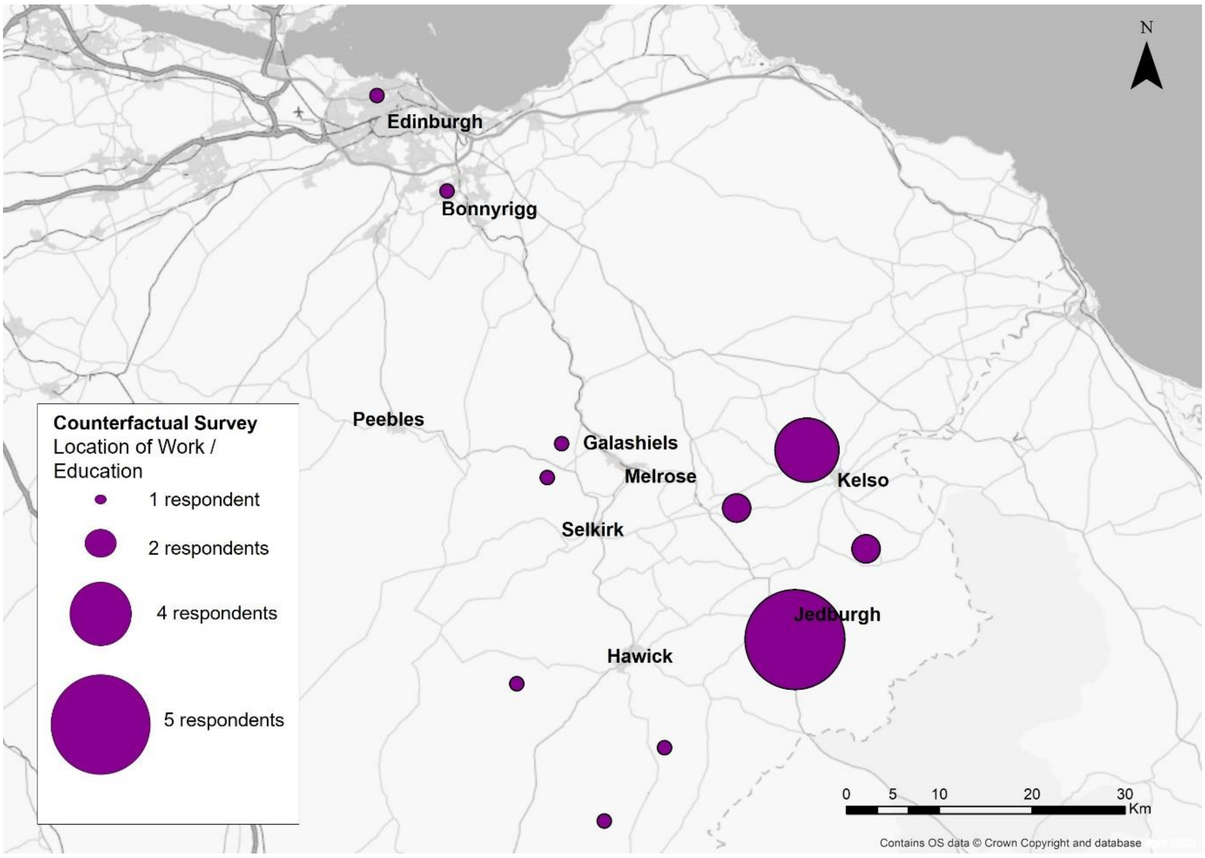

Figure 40 - Counterfactual Survey – Respondent work/education location

Around half of the respondents typically travelled for work/educational purposes five days a week (52%, n=24), with all of the other respondents (n=22) travelling between two and four days a week.

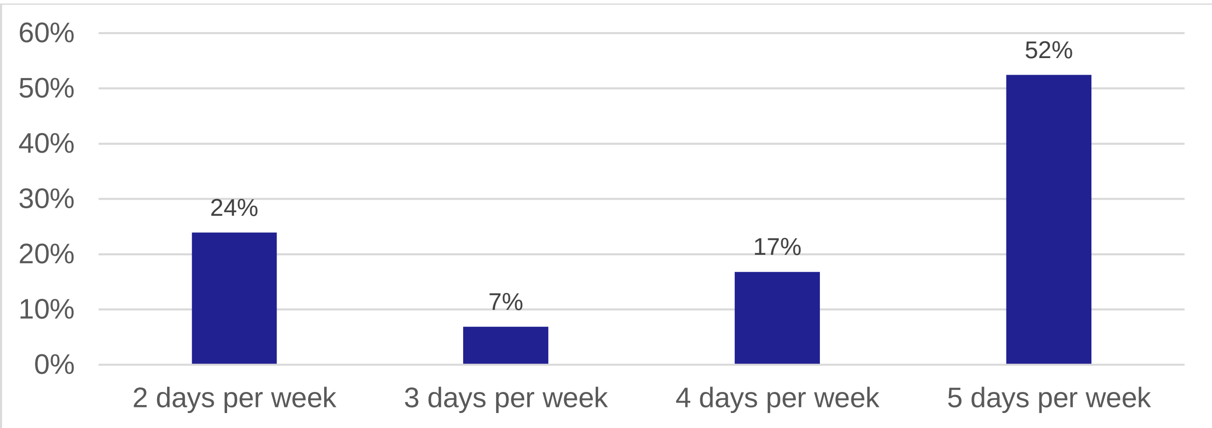

Figure 41 - Counterfactual Survey – Frequency of travel for work/education

Respondents were asked how long their journey to work/education usually takes. As shown below, 31% (n=14) of respondents indicated that their journey takes between 16-30 minutes and over an hour respectively:

- <10 mins: 9%

- 10-15 mins: 27%
- 16-30 mins: 31%
- 31 mins-1 hour: 2%
- >1 hour: 31%

Just over half of the respondents drove to work/education (53%, n=24), while 32% (n=15) indicated that they travelled by bus and 12% (n=5) walked.

Table 24 Counterfactual Survey – Mode of travel to work/education

Travel Mode	Number	Percentage
Car / Van (drove myself)	24	53%
Bus	15	32%
Walk	5	12%
Car / Van (dropped off)	1	3%

The respondents who travelled by bus stated that they used the following services:

- Service 20, Peter Hogg
- Service 67, Border Buses
- Service 68, Border Buses

Those who indicated that they drove themselves to work/education were asked where they parked. Most (85%, n=21) indicated that they parked at their workplace while the other 15% (n=4) used free on-street parking.

Travel for Personal Business / Leisure

Destinations Visited

All respondents were asked to identify the locations they had travelled to for personal business (including trips to/from banks, churches, hospitals, doctors' surgeries, dentists, hairdressers, libraries, etc.) and for leisure in the last 30 days. Table 25 shows that most respondents had visited Galashiels (68%, n=69), Jedburgh (61%, n=26), Kelso (58%, n=59) and Hawick (56%, n=57) for personal business. Similarly, Galashiels (62%, n=63) and Jedburgh (46%, n=46) were also the most popular locations to visit for leisure.

Table 25 Counterfactual Survey – Destinations visited for both personal business and leisure

Destination	Personal Business (No.)	Leisure (No.)	Personal Business (%)	Leisure (%)
St Boswells	38	12	37%	12%
Jedburgh	**62**	**46**	**61%**	**46%**
Melrose	40	26	39%	26%
Tweedbank	25	12	25%	14%
Galashiels	**69**	**63**	**68%**	**62%**
Kelso	**59**	37	**58%**	36%
Hawick	57	38	56%	38%
Peebles	6	8	6%	8%
Edinburgh	38	32	37%	32%
Berwick-upon-Tweed	7	11	7%	11%
Newcastle	2	9	2%	9%
Carlisle	3	9	3%	9%
Other	3	6	3%	6%
I've not travelled for personal business purposes in the past 30 days	3	10	3%	10%
Base*	**409**	**322**	-	-

*Multiple responses were given at this question

The 'other' locations that respondents travelled to for personal business included Bonchester Bridge, Kirkcaldy, Lenzie and Newton, while the 'other' locations visited for leisure included Aberdeen, Ancrum, Coldstream, Dumfries, Dunbar, Eyemouth, Earlston, Lanark and Langholm.

Frequency of Visits

Table 26 shows that most locations were visited up to five times in the last 30 days for personal business. The respondents indicated that they travelled to Jedburgh most often of the locations listed, with 27% (n=16) of respondents noting that they had travelled there more than 20 times in the last 30 days.

Table 26 Counterfactual Survey – Frequency of personal business trips

Personal Business Travel	Up to 5 times	6-10 times	11-15 times	16-20 times	21-30 times	>30 times	Base:
St Boswells	72%	8%	5%	5%	11%	-	**n=38**
Jedburgh	51%	3%	6%	13%	27%	-	**n=62**

Melrose	79%	7%	8%	5%	-	2%	**n=40**
Tweedbank	89%	7%	-	-	4%	-	**n=25**
Galashiels	78%	19%	-	-	3%	-	**n=69**
Kelso	87%	8%	1%	2%	2%	-	**n=59**
Hawick	75%	18%	2%	1%	3%	2%	**n=57**
Peebles	100%	-	-	-	-	-	**n=6**
Edinburgh	94%	2%	-	-	1%	2%	**n=38**
Berwick-upon-Tweed	80%	20%	-	-	-	-	**n=7**
Newcastle	100%	-	-	-	-	--	**n=2**
Carlisle	100%	-	-	-	-	-	**n=3**

In terms of leisure travel, once again, across all locations most respondents indicated that they travelled there up to five times in the last 30 days. Similar to the personal business travel, Jedburgh was a popular place to travel for leisure with 21% (n=10) of respondents indicating that they had travelled there between 21 and 30 times in the last 30 days.

Table 27 Counterfactual Survey – Frequency of leisure trips

Leisure Travel	**Up to 5 times**	**6-10 times**	**11-15 times**	**16-20 times**	**21-30 times**	**>30 times**	**Base:**
St Boswells	68%	7%	7%	7%	10%	-	**n=12**
Jedburgh	53%	5%	18%	2%	21%	-	**n=46**
Melrose	93%	-	3%	-	-	4%	**n=26**
Tweedbank	94%	6%	-	-	-	-	**n=14**
Galashiels	93%	3%	1%	-	3%	-	**n=63**
Kelso	87%	10%	-	1%	2%	-	**n=37**
Hawick	72%	24%	-	1%	2%	-	**n=38**
Peebles	100%	-	-	-	-	-	**n=8**
Edinburgh	93%	7%	-	-	-	-	**n=32**
Berwick-upon-Tweed	92%	8%	-	-	-	-	**n=11**
Newcastle	100%	-	-	-	-	-	**n=9**
Carlisle	100%	-	-	-	-	-	**n=9**

Travel Mode

Table 28 and Table 29 show which mode of transport respondents typically used to get to each of the locations for personal business and leisure. As shown, car/van travel was the most popular mode of choice for all of the locations across both travel purposes. Where rail travel was used, it was generally for trips to Edinburgh. Buses were used to travel to several of the locations, but Galashiels and Hawick were the most popular locations to travel to by bus.

Table 28 Counterfactual Survey – Travel mode for personal business tripsTable 14 Resident Survey – Travel mode for personal business trips

Personal Business Travel	Walk	Bus	Rail	Car/Van (dropped off)	Car/Van (drove myself)	Other	Base
St Boswells	5%	5%	-	31%	59%	1%	**n=38**
Jedburgh	29%	1%	-	19%	50%	1%	**n=62**
Melrose	-	3%	-	18%	79%	-	**n=40**
Tweedbank	-	2%	-	37%	61%	-	**n=25**
Galashiels	-	16%	-	30%	54%	-	**n=69**
Kelso	-	3%	-	22%	73%	2%	**n=59**
Hawick	-	15%	-	17%	68%	-	**n=57**
Peebles	-	-	-	21%	79%	-	**n=6**
Edinburgh*	-	5%	8%	22%	61%	1%	**n=38**
Berwick-upon-Tweed	-	7%	-	33%	60%	-	**n=7**
Newcastle	-	-	-	-	100%	-	**n=2**
Carlisle	-	-	-	28%	72%	-	**n=3**

*A further 20% of leisure trips to Edinburgh was indicated to be completed by 'Bus and Rail' and 8% of leisure trips to Edinburgh were undertaken by 'Park and Ride (Rail)'

Table 29 Counterfactual Survey – Travel mode for leisure trips

Leisure Travel	Walk	Bus	Rail	Car/Van (dropped off)	Car/Van (drove myself)	Other	Base
St Boswells	18%	7%	-	18%	54%	3%	**n=12**
Jedburgh	50%	1%	-	8%	41%	1%	**n=46**
Melrose	4%	-	-	24%	73%	-	**n=26**
Tweedbank	-	-	7%	58%	35%	-	**n=14**
Galashiels	-	22%	-	33%	45%	-	**n=63**
Kelso	-	1%	-	22%	77%	-	**n=37**
Hawick	-	18%	-	19%	64%	-	**n=38**
Peebles	-	-	-	33%	67%	-	**n=8**
Edinburgh*	-	3%	8%	28%	29%	1%	**n=32**
Berwick-upon-Tweed	-	4%	-	32%	56%	8%	**n=11**
Newcastle	-	-	-	-	100%	-	**n=9**
Carlisle	-	71%	-	20%	10%	-	**n=9**

Bus Services Used

Those who indicated that they travelled by bus for both personal business and leisure used the following services:

- Service 51 to St Boswells
- Service 29 to Jedburgh
- Service 68 to Melrose, Tweedbank and Galashiels
- Service 20 to Kelso and Hawick
- Service 51 or 52 to Edinburgh
- Service 60 to Berwick-upon-Tweed

Journey Times

Respondents were then asked to indicate how long it took them to travel to each location. The results of this are shown in Table 30 and Table 31. While the journey times are similar between the two travel purposes, there are some differences. For example, those travelling to Jedburgh for leisure indicated that their journey time was longer than those travelling for personal business.

Respondents generally travelled for the least amount of time to reach Jedburgh and St Boswells. Conversely, respondents travelled the longest to reach Newcastle, Edinburgh and Carlisle.

Table 30 Counterfactual Survey – Personal business trip journey time

Personal Business Travel	**0-5 mins**	**6-10 mins**	**11-20 mins**	**21-30 mins**	**31mins – 1 hour**	**>1 hour**	**Base**
St Boswells	27%	14%	46%	9%	4%	-	**n=38**
Jedburgh	42%	36%	21%	1%	-	-	**n=62**
Melrose	5%	22%	56%	12%	4%	-	**n=40**
Tweedbank	4%	9%	74%	12%	2%	-	**n=25**
Galashiels	-	1%	37%	45%	16%	1%	**n=69**
Kelso	2%	3%	77%	15%	4%	-	**n=59**
Hawick	-	8%	62%	27%	3%	-	**n=57**
Peebles	-	-	7%	15%	57%%	22%	**n=6**
Edinburgh*	-	-	-	-	62%	36%	**n=38**
Berwick-upon-Tweed	-	-	-	-	80%	20%	**n=7**
Newcastle	-	-	-	-	-	100%	**n=2**
Carlisle	-	-	-	-	14%	86%	**n=3**

Table 31 Counterfactual Survey – Leisure trip journey time

Leisure Travel	**0-5 mins**	**6-10 mins**	**11-20 mins**	**21-30 mins**	**31mins – 1 hour**	**>1 hour**	**Base**
St Boswells	36%	29%	21%	7%	7%	-	**n=12**
Jedburgh	23%	40%	19%	16%	2%	-	**n=46**
Melrose	5%	21%	59%	7%	9%	-	**n=26**
Tweedbank	6%	16%	68%	10%	-	-	**n=14**
Galashiels	-	1%	25%	48%	26%	-	**n=63**
Kelso	-	6%	71%	19%	4%	-	**n=37**
Hawick	-	10%	71%	17%	0%	-	**n=38**
Peebles	-	-	-	11%	72%	17%	**n=8**
Edinburgh*	-	-	-	-	58%	42%	**n=32**
Berwick-upon-Tweed	-	-	-	-	84%	16%	**n=11**
Newcastle	-	-	-	-	5%	95%	**n=9**
Carlisle	-	-	-	-	5%	95%	**n=9**

Key Themes and Conclusions

Resident Survey Summary

Respondents to the resident survey indicated that there is currently a reliance on private cars for all journey purposes. 82% (n=145) of respondents noted that they travelled to their place of work or education by car. Across all the destinations that respondents travelled to for personal business/leisure, car was the mode of choice by over 75%.

86% (n=305) of respondents indicated that they do not currently use the rail network but 42% (n=129) of this group noted that they would like to travel to destinations served by rail but are currently unable to. The key reasons given for not currently using the rail network were the convenience of the private car and the limited public transport connections to/from the rail station at both their origin and destination.

Of the 13% (n=47) of respondents who indicated that they do currently use the rail network, 67% (n=32) noted that they access the station by car. Berwick-upon-Tweed was the most popular station. These respondents were satisfied with train journey times, the availability of seats on services, on-board comfort and reliability of services. However, they were dissatisfied with the time of the first and last service, parking availability at stations and the frequency of services.

Overall, 40% (n=141) of respondents indicated that they plan to use the new rail link at Reston and a further 22% (n=77) indicated that they were unsure whether they would use the new rail link. Interestingly, respondents highlighted that they expected the majority of journeys that they would carry out using the rail link would be for leisure purposes.

Visitor Survey Summary

71% (n=73) of respondents to the survey visited East Berwickshire at least once a year and, as such, were deemed to be ‘regular visitors’. 64% (n=46) of this group indicated that they travel to the area for a day trip. The beaches in the area were the key attractor for visitors, followed by historic sites. In terms of spend in the area, 57% (n=42) indicated that they spend £50 or less on their trip to East Berwickshire. 25% (n=18) noted that they spend over £100.

The majority, 77% (n=56), of regular visitors indicated that they travel to the area by car. A further 17% (n=12) of this group noted that they travel to the area by a combination of train and bus. Respondents were asked to highlight any issues that they encountered when travelling to the area. 31% (n=18) of the group noted that the lack of direct rail service in the area was a significant issue, 30% (n=17) noted that the lack of real time information at bus shelters was a significant issue and 30% (n=16) indicated that generally the bus services in the area was a significant issue.

Of the 29 'non-visitors' who completed the survey, 19% (n=6) noted that they don't visit East Berwickshire because there is no rail link. 21% (n=7) also indicated that they don't visit as they don't have access to their own vehicle. Essentially a lack of travel choice/option accounted for 40% of those who do not visit the area.

53% (n=39) of the regular visitors indicated that they would be very likely or likely to visit East Berwickshire more often as a result of the new rail link. Additionally, 48% (n=14) of the non-visitors indicated that they would be very likely or likely to visit the area with the new rail link in place.

Business Survey Summary

Of the 100 businesses that responded to the survey, 68% (n=68) were aware of the rail link opening. 46% (n=46) noted that, once open, Reston would be the closest rail link to their business.

Generally, businesses noted that the advantages to operating in the area included the high quality of life living in the area and the fact that there are few competitors. The disadvantages cited were poor public transport links, limited business opportunities due to rurality and difficulties attracting and retaining staff. The businesses also noted that the majority of their key market, suppliers and competitors are located either elsewhere in the Scottish Borders or in the North of England.

Once again, the survey results indicated a reliance on car travel with over half of businesses noting that over 75% of their employees currently drive to work. 24% (n=24) of the businesses agreed that the new station would enable them to expand their business, 31% (n=31) agreed that when the station is open, they will be able to expand their customer base and 28% agreed that the opening of the station will lead to an increase in turnover.

On the other hand, 86% of respondents disagreed that the reopening of the station will make it more difficult to retain staff, 85% disagreed that when the station reopens they will have to take on more staff, 82% disagreed that they would increasingly use suppliers form different areas as a result of the station opening and 81% disagreed that they will rely on local customers when the station opens.

Counterfactual Survey Summary

Overall, 39% (n=40) respondents to the counterfactual survey noted that they were dissatisfied with the current public transport services with respect to their household's needs. When asked to indicate the main factors which influence their satisfaction with public transport, respondents indicated that frequency, availability of services, reliability and length of operating day were the most important factors. In total, 74% (n=75) of respondents noted that if public transport services in their area improved, their household would be more likely to use them.

Just over half of the respondents drove to their place of work or education, while 32% travelled by bus. Car/van was also the most popular mode choice when travelling for personal business and leisure. Where rail travel was used, it was predominately for trip to Edinburgh.

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