Swindon and Wiltshire Rail Study 09/05/2019

Reference number 107523

ANNEX B – PROFILE OF SWINDON AND WILTSHIRE AND THE ROLE OF RAIL

Swindon & Wiltshire LOCAL ENTERPRISE PARTNERSHIP

SYSTRA

SWINDON BOROUGH COUNCIL

Wiltshire Council Where everybody matters

SLC Rail

SWINDON AND WILTSHIRE RAIL STUDY

ANNEX B – PROFILE OF SWINDON AND WILTSHIRE AND THE ROLE OF RAIL

IDENTIFICATION TABLE	
Client/Project owner	Swindon and Wiltshire Local Enterprise Partnership
Project	Swindon and Wiltshire Rail Study
Study	Annex B – Profile of Swindon and Wiltshire and the Role of Rail
Type of document	Report
Date	09/05/2019
File name	
Framework	N/A
Reference number	107523
Number of pages	32

APPROVAL

Version	Name		Position	Date	Modifications
1	Author	A Sykes/J Jackson		05/02/2019	
	Checked by	J Jackson		05/03/2019	
	Approved by	D Bishop		05/03/2019	
2	Author	A Sykes/J Jackson		09/05/2019	
	Checked by	J Jackson	Associate	09/05/2019	
	Approved by	A Sykes	Associate Director	09/05/2019	

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

1. PROFILE OF SWINDON AND WILTSHIRE AND THE ROLE OF RAIL

1.1 Introduction

1.1.1 The Swindon and Wiltshire LEP area contains a strong and growing economy located in a pivotal location, with a diverse range of industries and sectors operating within it helping to form a strong and mixed economy. In turn, the local and regional economy helps to support the resident population, providing access to opportunities.

1.1.2 The rail network within the area already supports the economy in the SWLEP area, providing strategic connectivity regionally and towards London, whilst it also provides access to work, education and healthcare for the population to which the rail network is accessible. As will be seen in this and other Annexes, however, there is scope for the rail network to support the area further, with the economy and the railway ultimately forming a symbiotic relationship.

1.1.3 Looking to the future there is a strong desire to grow the economy further, focussing on high value industries, whilst at the same time improving the quality of life of residents of the area, making Swindon and Wiltshire an attractive place to live and work.

1.1.4 The railway has an important role to play in supporting this, through improvements to existing links, the development of new links and improvements in the accessibility of the network.

1.1.5 Within the remainder of this Annex we examine the economic factors influencing Swindon and Wiltshire, considering the role of rail within it and looking at how rail might be a catalyst for indigenous economic growth and exogenous access to opportunity. We will also look at how rail can help deliver an increase in housing in a sustainable manner as part of a wider examination of socio-demographic factors influencing Swindon and Wiltshire and the extent to which rail can contribute to the issues identified.

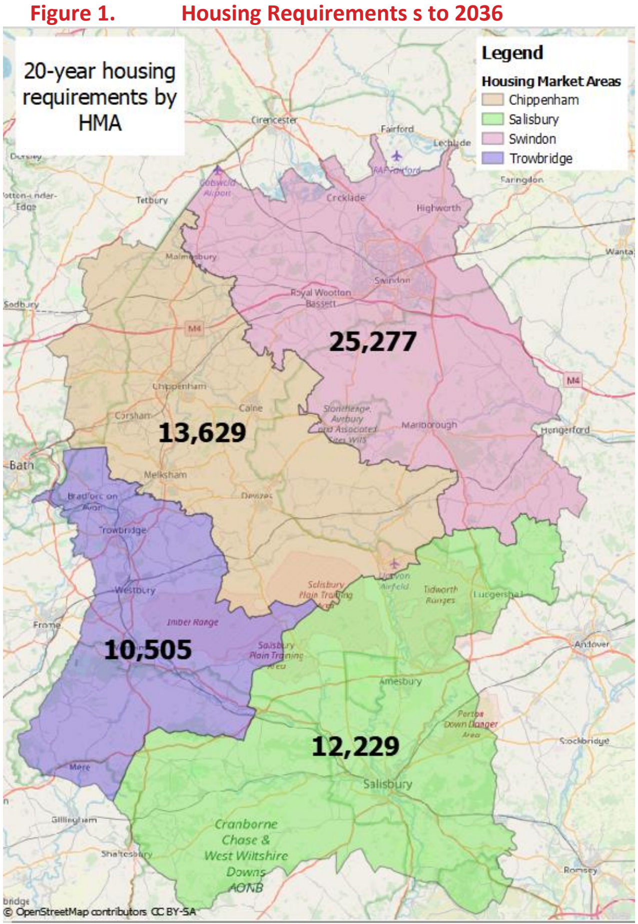
2. ECONOMIC FACTORS

2.1 Planned growth

2.1.1 Swindon and Wiltshire are planning for a total of 73,000 new dwellings up to 2036. A joint spatial framework is being developed to sit alongside the individual Swindon and Wiltshire Local Plan documents; this joint spatial framework will set out the overall scale and distribution of housing and employment identifying strategic employment locations and infrastructure requirements. It is anticipated that the distribution of new housing will be divided approximately 40% in Swindon housing market area, 30% in the Chippenham housing market area, 11% in the Salisbury housing market area and 19% in the Trowbridge housing market area. With appropriate planning, the rail network could have a strong role to play in delivering this housing in as sustainable manner as possible in turn presenting the opportunity to use additional passengers generated to support the delivery of improved rail services.

2.1.2 The figure below presents the estimated quantum of housing required across the Swindon & Wiltshire area over the period to 2036 by Housing Market Area. The bulk of the additional housing is planned for the Swindon area with the Chippenham and Salisbury area being renewing the greatest levels of housing in Wiltshire. In rail terms these areas are characterised by relativity poor access to the network.

Figure 1. Housing Requirements s to 2036



2.1.3 As we have seen above the SWLEP, Swindon Borough Council and Wiltshire Council all hold aspirations and targets to increase the number of homes in the Swindon and Wiltshire area. Delivery of these homes is spread between a number of strategic sites, urban extensions and a range of smaller sites. Whilst there is a need to support the growth and development of homes across the whole area, there may be benefits from locating homes within easy access of the rail network.

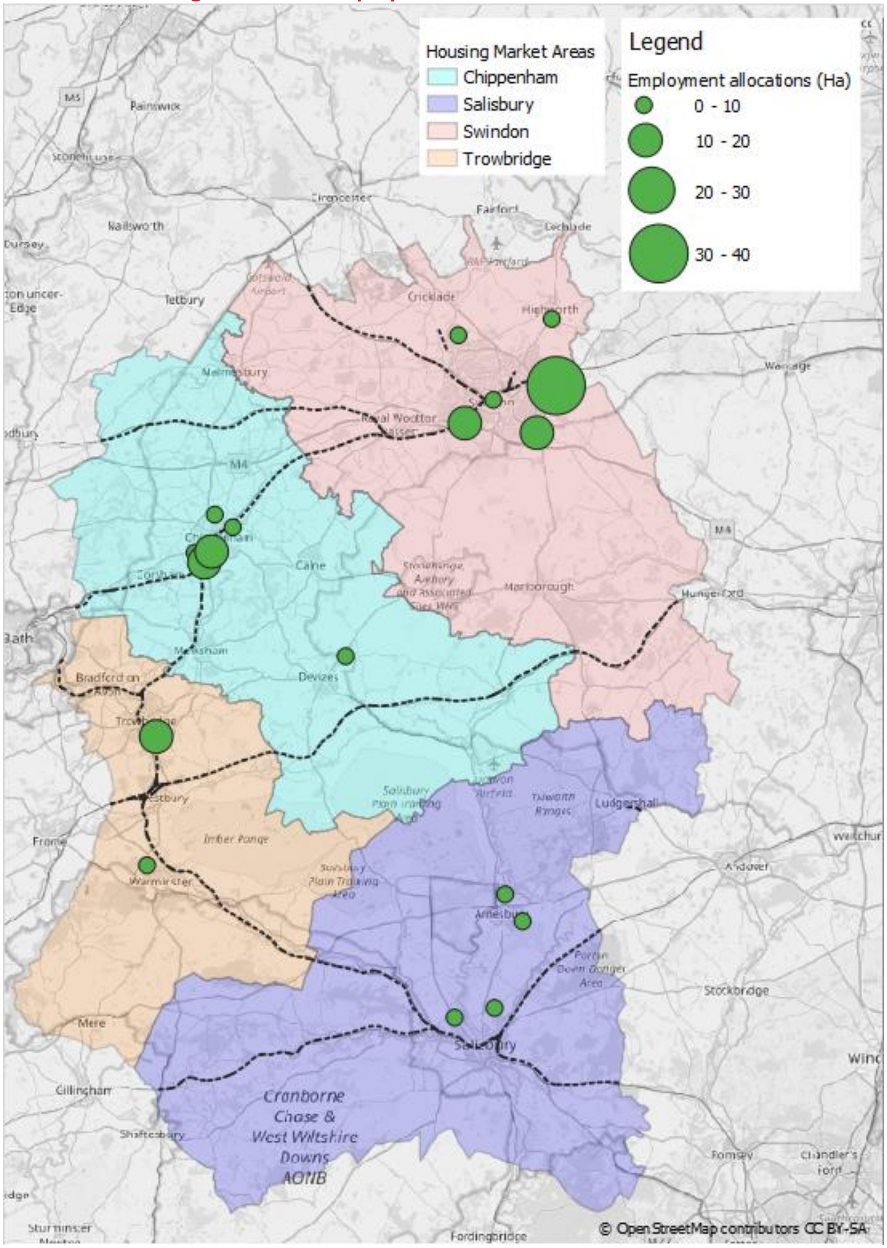
2.1.4 There are a number of reasons for this. The most important is the impact that this may have on the externalities imposed by development. Locating development so that it can be accessed by rail and sustainable modes reduces the impact of development on other parts of the transport network, especially roads. It also provides residents of the new development with access to opportunities with greater flexibility over choices of work, education and leisure activities, thus bringing benefits to both new and existing residents.

2.1.5 In addition, planning development around a high quality rail service may help to bring development forward more quickly, with developers being more inclined to bring forward development at these locations than more poorly connected locations, precisely for the reasons identified above.

2.1.6 There is some evidence to suggest that development around rail stations may command a higher value than other development; equally there are also examples where proposed development has helped to improve the case for investment in rail schemes such as new stations. This highlights rail's potential to contribute to a "virtuous circle" of sustainable development for Swindon and Wiltshire. Evidence from the Netherlands[1] suggests that business location choice can be determined by the existence of high quality rail services although the effects can often be relatively localised, with the impact diminishing over a 15 minute walking catchment from a station, indicating that easy access to a station is an important component of a business location decision as well as the impact of the quality of the rail service provided. In Wiltshire, whilst Great Western Mainline services to London are of a high quality access to these services is limited for a large part of the area, potentially damping the economic impact of the route.

[1] Willigers, J. (2011) High speed rail and office location choices. A Stated preference experiment for the Netherlands. Journal of Transport Geography

Figure 2. Employment site allocations



2.1.7 The emerging evidence to support the Local Plan reviews and joint spatial framework indicates that in the region of 40,230 jobs will be created by 2036, with the following office and industrial floor space requirements suggested by the Functional Economic Market Areas (FEMA) report:

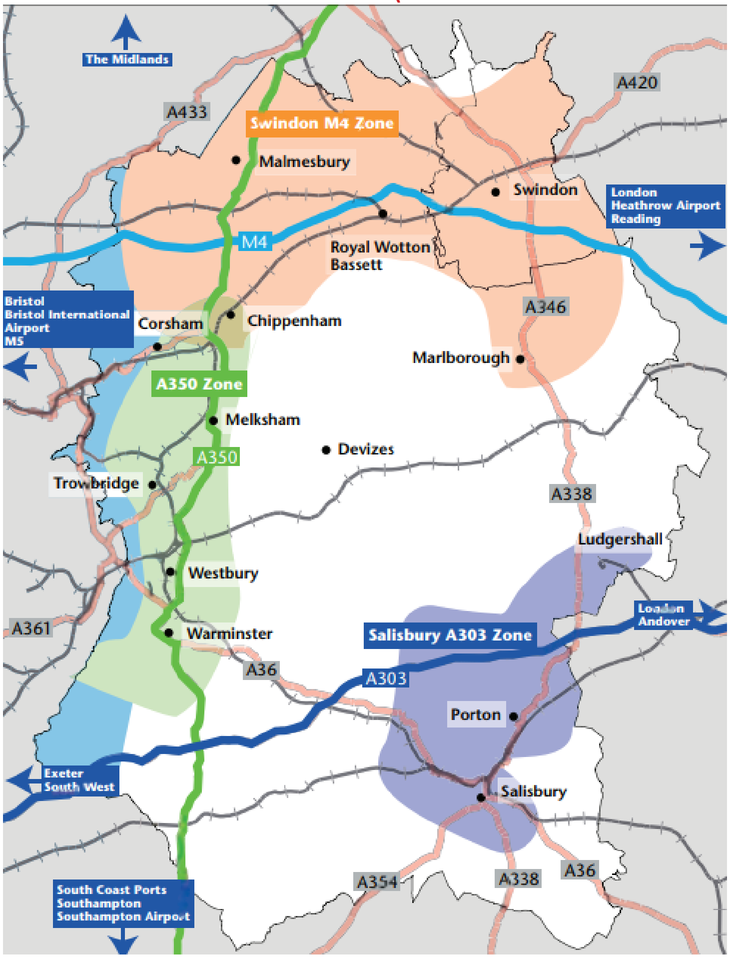
Office and industrial floor space requirements 2016 - 2036

FEMA	Number of jobs 2016 – 2036	Additional office (ha)	Additional Industrial (ha)
Swindon FEMA	15,030	19.2 - 47.9ha	87ha
A350 FEMA	13,770	8.3 - 20.8ha	83.1ha
Salisbury FEMA	11,430	6.3 - 15.6ha	44.4ha

2.2 SWLEP Growth Zones

2.2.1 Three Growth Zones have been identified within the LEP's Strategic Economic Plan. **The Growth Zones cover the area with the greatest potential for economic development** and also contribute to the growth and reputation of UK as a whole. The Growth Zones already account for 73% of employment and 80% of population within Swindon and Wiltshire; their coverage is outlined below.

Figure 3. Growth Zones in Swindon and Wiltshire (Source Swindon & Wiltshire SEP 2016)



2.2.2 The Growth Zones reflect functional economic geography, where there are large agglomerations of economic activity with greatest capacity for sustainable growth. Transport has a key role to play in the effective delivery and development of these zones, as efficient transport networks can increase the effective density of a location by increasing the number of people who can access the area quickly. Transport investment can also unlock employment and housing sites, facilitating accelerated growth. Thus, **ensuring that the growth zone are supported by a strong local and strategic transport network is critical to supporting their future growth.**

Swindon - M4 Growth Zone

2.2.3 This zone is made up of settlements along the M4 corridor including Swindon, Royal Wotton Bassett, Malmesbury and Chippenham. The Swindon-M4 corridor is home to a large number of knowledge-intensive businesses, including advanced manufacturing, professional services, digital, electronics and telecommunications companies. The M4 and Great Western Rail Line are important arterial routes for linking people to jobs and transporting goods.

2.2.4 This zone has the advantage of connectivity to significant areas of economic growth, however there are a number of pinch points which need to be addressed if the growth potential of the corridor is to be realised. **Rail connectivity is also strong following electrification of the Great Western Railway which will reduce journey times between Swindon and London and also improve access to Heathrow Airport**, ultimately supported by the development of Western Rail Access to Heathrow, providing a direct link from Reading to Heathrow Airport. However although the quality of the rail services operated is high in this area, access to the network is relatively poor. The M4 Growth Zone only contains two rail stations, at Swindon and at Chippenham. Both of these stations are inevitably treated as Parkway stations for the wider area, but access to either station from the wider growth area is relatively poor, being via congested urban roads, meaning that rail users both experience a poor access experience but also impose congestion on other road users. A number of station schemes have been proposed for this area to address the issue, and these are discussed in more detail elsewhere in the report.

2.2.5 A key issue for the zone is that the town centre in Swindon does not project the image of Swindon's thriving knowledge intensive economy. The long term physical development of the town is required to develop the centre in a holistic way whilst preserving its historic features and meeting demand of high quality office space. This issues around the town centre also extend to include the area around the rail station and the rail station itself, whose passenger facilities are relatively limited. It is known that Swindon Borough Council are already actively pursuing a scheme to improve the station area.

2.2.6 **The corridor also includes two of the largest planned urban extensions in the country at Wichelstowe and New Eastern Villages in Swindon**. Wichelstowe is located to the south of the Great Western Mainline, and is therefore less accessible to rail, although there is an opportunity to provide access via proposed Bus Rapid Transit schemes. In contrast, the Eastern Villages proposals present the opportunity to provide access by rail improving the sustainability of these developments, with the potential to provide a catalyst for a wider improvement in access to the rail network from the east and north side of Swindon, through the development of a station at Swindon East.

A350 Growth Zone

2.2.7 This zone stretches from Chippenham along the A350 corridor, linking the nine strategic sites in the area. **It is strategically significant as it connects western Wiltshire with the M4 to the North and the A303 to the south.**

2.2.8 The key sources of employment in the zone are in Manufacturing, Health, Retail and Business Administration and Support Services, accounting for 41% of all employees in the Zone. Employment in the Manufacturing Sector actually increased between 2012 and 2014, accounting for 11.1% of total employment in the Zone, appreciably higher than the average nationally and for Swindon and Wiltshire. **The A350 zone has strengths in a number of Swindon and Wiltshire LEP's priority sectors, particularly Food and Drink, ICT and Telecommunications, Defence, Advanced Manufacturing and Tourism/Visitor Economy**.

2.2.9 Across the zone, 18.6% of employees were working in Knowledge-Based Industries in 2014 which is below average compared to Great Britain (20.7%) and Swindon and Wiltshire (22.8%). In terms of the number of businesses, the A350 Zone is home to 8,200 businesses which represents 25% of the total number in the SWLEP area. A net growth of 745 businesses was experienced between 2010 and 2015, which is an increase of 10%. Growth has been experienced across all employment size bands except for those companies employing over 250 people.

2.2.10 **This zone is situated on a critical north – south corridor not replicated elsewhere in Wiltshire** and as such the corridor sees considerable in- and out-commuting flows with the West of England, Dorset, Gloucestershire and Heart of the South West.

2.2.11 **Of the three growth zones the A350 is best supported by access to the rail network,** with nine stations between Salisbury and Chippenham/Bradford-upon-Avon on the Trans Wilts corridor. However the character of services provided is quite different to other routes in Wiltshire with local and regional connectivity towards the Solent, Bristol and South Wales. At Westbury, services also operate to the South West and to the Thames Valley and London, although services frequencies are currently poor; access to London is also available via interchange at Salisbury, Bath or Chippenham.

2.2.12 Where this zone meets the M4 zone in the Chippenham area the issues afflicting the M4 zone also exist, with access to the rail network being poorer than in other parts of the zone, with a notable gap in rail access in the North West corner of the county.

Salisbury A303 Growth Zone.

2.2.13 The A303 Growth Zone runs through the south of the county, following the A303 which provides links to the West of England and the South East and London. **The zone includes the garrison towns of Bulford, Amesbury, Tidworth and Ludgershall make up this zone alongside Salisbury, and the area includes the Salisbury research triangle. There are significant opportunities provided by military, life sciences and defence technologies within this area.**

2.2.14 In 2013, this zone generated 11% of GVA generated in the Swindon and Wiltshire area, worth £1.8bn[2]. There are eight strategic sites located across this zone, strengthening its future growth potential. Between 2012 and 2014, the number of employees in the area grew by 6.3% to 41,800 compared to 7.4% growth for Swindon and Wiltshire as a whole and 5.2% across Great Britain. The key sources of employment are in Health, Professional, Scientific and Technical Services, Retail and Accommodation and Food Services, accounting for 54% of all employees in the zone. The growth in the number of employees between 2010 and 2012 has

[2] Swindon and Wiltshire Growth Zones: An Economic Overview, 2016, SWLEP

been minimal owing to a significant reduction in the number of people employed in the public sector. Growth has picked up since 2012 led by employees in the health, professional, scientific and technical services and business administration and support services.

2.2.15 Perhaps more than other parts of the LEP area the A303 zone is also influenced by tourism, with the historic city of Salisbury and nearby Stonehenge together acting as strong attractors of tourist revenue.

2.2.16 Whilst the A303 runs through the centre of the zone, and there are plans for its upgrade**, access to the rail network is significantly more limited. There is only one station within the zone itself, at Salisbury.** Salisbury is a key junction in the Swindon and Wilts rail network and enjoys a frequent train service to London, although average speeds are lower than those on other routes within Wiltshire. It also enjoys an hourly service to Exeter via the West of England Line, although again average speeds are limited on this route. Finally the station is located on the Trans Wilts corridor, with a two train per hour service to Southampton and a minimum frequency of one train per hour towards Westbury, Trowbridge and Bristol. However access to the station, which is located to the north west side of the city centre is difficult from the wider zone area. It is also poorly located for the life science and defence industries based in the Porton area.

2.3 A pivotal location

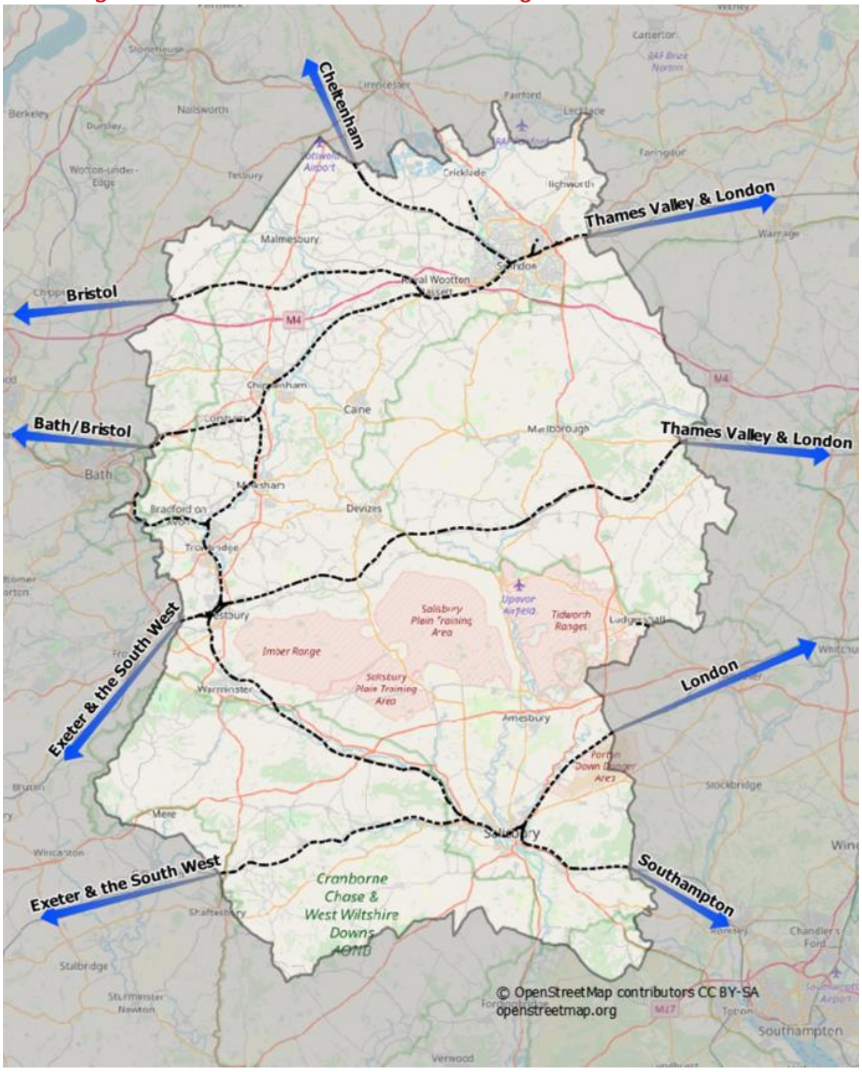
2.3.1 The central southern location of Swindon and Wiltshire provides a strong strategic position. It is **well placed for access to London and the Greater South East, Wales and the Midlands**. The area also has physically close to key airports including Heathrow and Bristol and coastal ports of Bristol, Southampton and Portsmouth.

2.3.2 Swindon and Wiltshire has good connections to the strategic road network through connection to the M4 whilst the rail network is formed of three East–West main lines providing strong connectivity to London, particularly from Swindon and Chippenham. Regional connectivity is also provided, notably via the Trans Wilts corridor providing links from the Solent, through Wiltshire, to Swindon, Bristol and Cardiff.

2.3.3 The area is at the heart of the M4 corridor and therefore able to draw from an extensive labour market along the M4 corridor and Great Western Rail route.

2.3.4 The area is central to the Great Western Mainline, indeed the development of Swindon as a settlement is due entirely to its position between Bristol and London and the decision by the Great Western Railway to establish its engineering function in the town, equipping the town with high skilled engineering jobs, providing a heritage that still exists in many of the industries in Swindon today.

Figure 4. Swindon and Wiltshire strategic location



2.3.5 The SEP has identified the need for a well-connected, reliable and resilient transport system to support economic and planned development growth, especially within the Growth Zones. The transport vision 2026 for Swindon and Wiltshire LEP identified a number of transport issues and barriers across the SWLEP area which if not addressed would undermine the areas ambitious expansion plans. These issues are summarised below;

- Major delays on A303 to the greater South West region. The increasing unreliability on the north south connections is significantly constraining business and development growth.[3]
- Major delays on connections to Cheltenham, Gloucester and West Midlands on the A419/A417.
- Indirect and/or infrequent North and South rail connections in places, for example between Trowbridge and Chippenham.
- Delays and journey time unreliability on the M4 corridor. The Highways England London to Wales Route Strategy identifies the section around Chippenham and Swindon as the worst parts of the network for journey delays.

[3] Strategic Economic Plan, January 2016

- Limited routing options for rail movements. Improved rail connections are compromised by a lack of key infrastructure including the single line through Melksham.[4]
- Poor connectivity to Bristol Airport.
- Delays on A420 to Oxford.
- The regeneration of Swindon Town Centre and the significant development growth planned in Chippenham, Salisbury and Trowbridge needs to be supported by improved local transport systems to help create more sustainable settlements.

2.3.6 Whilst a number of these issues relate directly to rail, investment in rail will more generally help to address many of the highway based issues. Indeed with targeted interventions rail could deliver transformational alternatives to road based transport.

2.4 A prosperous and resilient economy

2.4.1 Swindon and Wiltshire has a prosperous economy, with a mix of modern industries attracting **considerable inward investment from national and international businesses** including BMW and Zurich Insurance.

2.4.2 Swindon has a productive economy, with **one of the highest GVA per capita figures outside London**. However growth has slowed significantly compared to competitor locations in the last decade. This is reflected in SWLEPs GVA per head figures, where the rate of change in GVA per head is ranked last of all 39 LEPs since 2010, indicating a slow rate of growth[5].

2.4.3 There has been an increase in the number of businesses within Swindon and Wiltshire, with an 18% increase in Swindon and a 6% increase in Wiltshire. The area also has a good record of business survival, consistently performing above the national average. The 5 year business survival rate (i.e. businesses established in 2008 through to 2013) in Swindon and Wiltshire was 46.9% compared to just 41.3% for England and Wales.[6]

2.4.4 It is also interesting to note that, in terms of business size, Swindon has twice the proportion of very large companies than the national average., but the area also enjoys success with business start-ups. For example in 2016 and 2017 Wiltshire had the greatest absolute level of business start-ups of all unitary authorities or counties in the South West Region. Swindon has the second highest level of business start-ups as a proportion of all total business already in existence in the South West Region.

2.4.5 **The mix of industries provides a resilience to the local economy as the area is not reliant on one major employer**. The recent announcement from Honda of its intention to close its Swindon plant in 2021 is undoubtedly a significant loss for Swindon in both direct employment and the local, regional and national supply chain. However unlike other areas of the UK such as Sunderland with Nissan and the steel sector in Middlesbrough and Swansea, Swindon has a broad employment base and good skills levels (Swindon has the 12th lowest share of residents holding no formal qualification of al UK cities[7]), positioning the area well to

[4] Strategic Economic Plan, January 2016
[5] Summary of the Swindon and Wiltshire Local Economic Assessment (2016)
[6] Swindon and Wiltshire Strategic Economic Plan (2016)
[7] https://www.centreforcities.org/blog/what-hondas-closure-means-for-swindon-and-other-cities/

respond and adapt positively to such shocks. Despite this setback, therefore, the area retains a number of key characteristics which are attractive to business and attract investment.

2.4.6 There are strong prospects for employment growth in the Swindon and Wiltshire; with non-automotive employment growth predicted to grow at twice the expected national rate. **The occupational profile of the area is predicted to continue to shift towards higher level occupations**, with the greatest levels of growth amongst managers, professionals and associate professionals.

2.4.7 The SEP has Identified key sectors which have good prospects for growth. These are identified as priority sectors for Swindon and Wiltshire and are summarised below:

- Advanced engineering and high value manufacturing
- Health and life sciences
- Financial and professional services
- Digital and information and communications technology
- Land based industries.

2.4.8 Significant investment by the military over the last century has generated commercial opportunities which have driven innovation. As a result, a unique ICT infrastructure has built up around Corsham, where the Ministry of Defence (MoD) and the private sector have invested heavily in secure communications and data storage; Corsham is therefore home to a growing cluster of digital industries as well as the most secure cloud data centre and electrical supply in the country.

2.4.9 The presence of the military in south Wiltshire at Porton has resulted in the development of a cluster of health and life science companies adjacent to the Defence Science and Technology Laboratory (Dstl) and Public Health England with specialisms in microbiology, immunisation and medical care. **The Witty Review shows that the SWLEP is one of four LEPs, along with neighbouring Oxfordshire, with the highest proportions of Life Sciences employment in the country.**

2.4.10 The rail sector is also well represented in Swindon and Wiltshire. Invensys Rail based in Chippenham is a multinational technology leader, providing state-of-the-art software-based signalling, communication and control systems. Knorr-Bremse, based in Melksham, is the world's leading manufacturer of braking systems for rail and commercial vehicles.

2.4.11 Many of the industries identified above are high-skill knowledge industries which fall under the producer services sector, especially those with a high research and development content. The implication of this is that they benefit particularly from "agglomeration economies". At their broadest level, these occur when individuals benefit from being "near" to other individuals, and exist when the spatial concentration of economic activity gives rise to increasing returns in production. Transport and communications play a crucial role because, in most contexts, speed and low costs in transportation and communication provide a direct substitute for physical proximity[8].

[8] Daniel Graham & Patricia Melo, *Advice on the Assessment of Wider Economic Impacts: a report for HS2,* March 2010

2.4.12 Research[9] has identified that improved rail connectivity between places of different size may provide specific economic benefits. The obvious example in UK terms is the difference between London and provincial cities, where better connectivity enables the smaller centre to become "a more attractive location; it starts off with lower wages and rents, and improved connectivity means that it will get better access to London's large economic market and large base of suppliers".

2.4.13 This confirms that the railway can play a role in helping to support the development of the economy in the area. As has been suggested above (and elsewhere in the strategy) although there are some parts of the rail network across SWLEP which are already strong, there is a need for further targeted interventions to ensure that the rail network supports the local economy more effectively.

2.5 A centre for innovation

2.5.1 Innovation is described as central in the SWLEP Strategic Economic Plan. This is typified by the number of global investors who have invested and continue to prosper in the area such as Nationwide, Intel and Dyson. It is anticipated that with the availability of strategic sites across Swindon and Wiltshire plus the growing network of development sites across Corsham, Porton and Salisbury that **the area has the potential to attract more national and international investment**.

2.5.2 Swindon is home to seven National Research Councils as well as the Space Agency and the presence of the University of Bath's Sustainable Technology Centre at Wroughton. **There is also a high presence of innovation-sectors including health and life sciences, pharmaceuticals, mobile telecommunications, digital and high value manufacturing across Swindon and Wiltshire.** The effect of this activity is already visible, with employment in knowledge-based industries having increased by 15% between 2012 and 2014 to 65,600, nearly double the national growth rate (8.2%).[10] SWLEP also has a high proportion of employment in science, research, engineering and technical roles (9.1%) better than the national average (7.2%).

2.5.3 SWLEP's strength in innovations is also reflected in research and development spend per full time employee which is more than double the national average (£1682 compared with £811 nationally). Finally the area has a significant record in terms of registered Patents, with registered patents per 10,000 residents equal to 19.4 compared with national average of 9.3.

2.5.4 As with the producer services described above **innovation is very susceptible to the benefits of agglomeration economies.** Whilst this may take the form of very localised clusters there will always be opportunities for collaboration further afield. From the Wiltshire area the most obvious points for collaboration would be with research and innovation in London, Bristol, Southampton and the Cambridge – Milton Keynes – Oxford knowledge corridor. Wiltshire is well positioned to link to these economies by rail subject to some interventions to improve services.

[9] Bridget Rosewell (Volterra Partners) and Tony Venables (University of Oxford) *High Speed Rail, Transport Investment and Economic Impact*, 2013

[10] Swindon and Wiltshire Strategic Economic Plan, 2016

2.6 Diversity of economic geography

2.6.1 The economic geography of the area is very diverse, differing considerably between the north, centre and south. **The contrasting character of the area results in a range and variety of complex connections and plays an important role in shaping the future plans for growth, investment and infrastructure.**

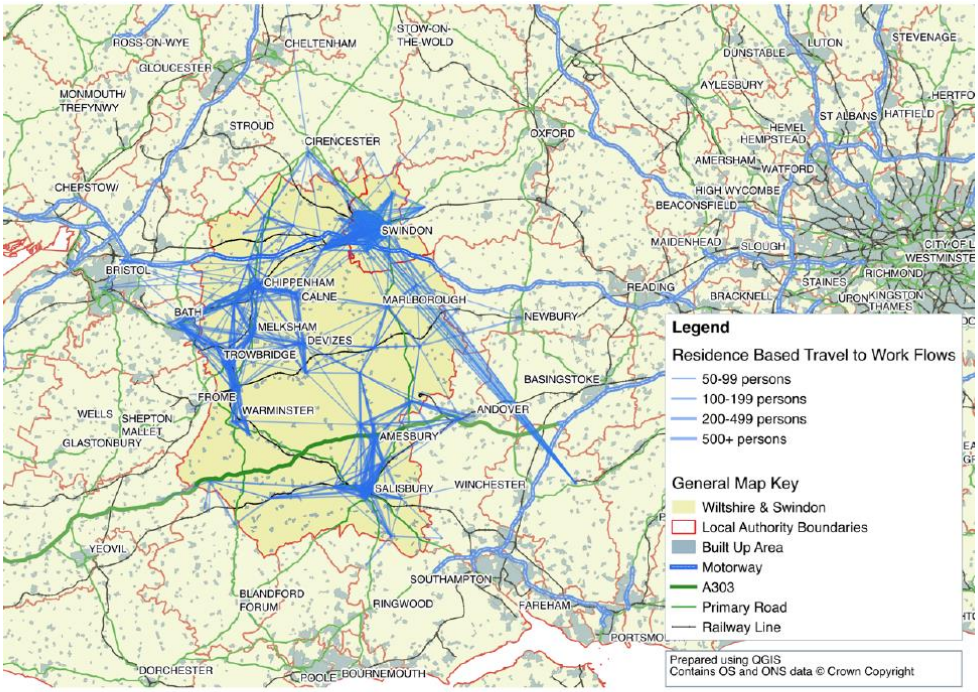
2.6.2 The economic output (GVA) of the Swindon and Wiltshire economy was estimated to be worth £18.02 billion in 2016[11]. Swindon's GVA per job (£54,837) was significantly higher than Wiltshire's (£43,495) in 2015, reflecting a long-standing trend. According to the LEP, this difference is likely attributable to the differing industrial make up, commuting patterns and population structure for the two authorities. **Swindon has more high value-adding industries such as professional services, a large number of head offices and a net inflow of highly skilled people, which all contributes to higher overall GVA output. In contrast, Wiltshire's rural and semi-rural make up means it experiences a net outward migration of workers and has an above-average proportion of retirees**. Between 2010 and 2015 GVA per job grew at a slower rate (6%) than the national average (11%).

2.6.3 The importance of individual industrial / commercial sectors to the two local authorities varies significantly. Swindon's economy largely generates its economic wealth from the Production, Finance and Insurance sectors; Wiltshire has greater shares of output from Public Administration and Defence, Education and Health, Real Estate and Construction.

2.6.4 The commuting flows differ across the LEP area. **Wiltshire has a daily net out-commuting population of 21,000 whereas Swindon has a daily net commute in-flow of 14,000.** The level of out-commuting from Wiltshire remains a challenge. The latest available travel-to-work data suggests three functional zones centred on Swindon, the west Wiltshire towns and Salisbury and Amesbury, as shown on Figure 4 below. There are also some key connections to areas outside of the administrative areas of Swindon and Wiltshire, notably Cirencester (Cotswold), Frome (Mendip) and Andover (Test Valley). There is also a noticeable out-flow relationship to Bath. This is illustrated in the map below which shows commuting flows of Swindon and Wiltshire residents:

[11] Swindon and Wiltshire Economic Assessment. Chapter 3 Business & Enterprise (May 2018)

Figure 5. Resident based commuting flows



Source: Swindon and Wiltshire Functional Economic Market Area Assessment, Hardisty Jones Associates, 2016[12]

2.6.5 An examination of the travel-to-work patterns shows **SWLEP's connections with neighbouring authority areas, through the flow of labour.** It is important to remember such flows of labour are also inherently dynamic and subject to change, particularly given continued investment in transport infrastructure and the disruptive effects of technology.

2.7 An attractive tourist offer

2.7.1 Swindon and Wiltshire boasts an attractive rural setting with world class landscape, heritage and visitor attractions. Approximately **three quarters of Wiltshire is designated as an Area of Outstanding National Beauty and is home to two world heritage sites,** attracting tourists as well as residents and employers to the areas quality of life offer.

2.7.2 As of 2015, the visitor economy in Swindon and Wiltshire was worth approximately £1.4 billion and supported over 28,000 jobs. This makes up around 9% of all employment in the area.

2.7.3 The Stonehenge and Avebury World Heritage Site (WHS) is seen as a major asset to Wiltshire's visitor economy. Stonehenge is the flagship visitor attraction for WHS and welcomed 1.58 million international and national visitors in 2017. The WHS also includes Avebury which is the largest stone circle in Europe. Other key tourist attractions include Salisbury Cathedral and Magna Carta, Stourhead, Lacock Abbey, Village and Fox Talbot Museum.

[12] It should be noted that there is an error in ONS Source Data which suggests there is a strong commuting flow between Swindon and North Hampshire

2.7.4 The **economic impact of tourism in the area is significant**. It is estimated that 18 million trips were made by day visitors in 2013 with domestic visitors staying 2.8 nights of average, and international visitors staying 6.1 nights. The average spend per trip of domestic visitors is £179, while inbound visitors are estimated to spend £335 per trip.

2.7.5 Transport is integral to the visitor economy as visitors need to travel to get to Swindon and Wiltshire and be able to travel around the area easily once they have arrived. The transportation of tourists is particularly challenging for the rail network, with poor connectivity to key sites, limited capacity, poor rolling stock and sometimes infrequent services to key destinations making some routes unattractive and / or impractical for visitors.

3. SOCIODEMOGRAPHIC FACTORS

3.1 Population growth and age profile

3.1.1 As of 2017, the population residing in the Swindon and Wiltshire LEP stood at 716,400, of which 69% live in Wiltshire (496,000) and the remaining 31% (220,400) in Swindon. **The area has experienced population growth above the average for England**; since 2001, the population has increased by 17% compared to a national increase of 12%. This includes a relatively high growth in working age population, supporting the view **that people are moving to the area as a result of the employment and lifestyle options** it offers. It is important to keep in mind, however, that despite this recent increase in working age population, SWLEP's share of the population that is working is still marginally below the national average, 62.2% compared with 63.5% nationally, while demographic factors mean that **the number of over-65s is set to increase** further. This reflects a national trend, it is forecast that by 2036 over half of all local authorities in England will have 25% or more of their local population age 65 or over.

3.1.2 An analysis has been undertaken examining the age profile within a 5km catchment of the rail stations within Swindon and Wiltshire. The results show some stronger relationships that may be attributable to rail accessibility as well as the economy in the local area. It is notable that Tisbury, Bradford-on-Avon, Warminster and Dean all have higher levels of over 65 households than the Wiltshire average. With the possible exception of Bradford-on-Avon all of these locations have relatively limited effective connectivity in terms of their combinations of destinations, journey times and frequencies.

3.1.3 It is also notable that the Bedwyn and Chippenham catchments have a higher than average number of households in the 35-54 age group, whilst there may be a number of reasons for this, this age group is likely to contain a higher number of established working families and as such access to employment and services will be important. In the case of Bedwyn, it is likely that the proximity of the Thames Valley and access to London within commuting distance by rail may be a factor whereas at Chippenham the station is readily accessible from across the town and provides links to employment opportunities in Bath, Bristol, Swindon and London.

3.1.4 With the exception of Swindon, the areas with the highest proportions of younger households (under 34) are Westbury, Trowbridge, Salisbury and Chippenham. It is unclear what drives this pattern; it is not likely to be driven by the quality of rail services.

Table 1. Adult Lifestage in rail served towns (% Households)

STATION	16-24	25-34	35-54	55-64	65-74	75+
Wiltshire LA	**12%**	**13%**	**37%**	**16%**	**12%**	**10%**
Swindon LA	**14%**	**18%**	**38%**	**14%**	**9%**	**8%**
Avoncliff	8%	7%	34%	20%	15%	14%
Bedwyn	9%	9%	40%	19%	14%	10%
Bradford-on-Avon	10%	10%	32%	18%	15%	15%
Chippenham	13%	14%	40%	15%	10%	8%
Dean	10%	9%	35%	19%	14%	12%
Melksham	12%	12%	36%	16%	13%	10%
Pewsey	10%	10%	38%	17%	13%	12%
Salisbury	12%	16%	34%	15%	11%	12%
Swindon	14%	18%	38%	13%	9%	8%
Tisbury	9%	8%	33%	20%	16%	15%
Trowbridge	13%	15%	36%	15%	11%	9%
Warminster	12%	12%	34%	17%	14%	12%
Westbury*	13%	14%	37%	16%	12%	9%

*Dilton Marsh the centre of the MSOA serving this station was allocated to Westbury station

3.1.5 The table below presents adult life stage groups divided for town in Wiltshire not served by rail.

Table 2. Adult Lifestage in non rail served towns (% Households)

STATION	16-24	25-34	35-54	55-64	65-74	75+
Wiltshire LA	**12%**	**13%**	**37%**	**16%**	**12%**	**10%**
Swindon LA	**14%**	**18%**	**38%**	**14%**	**9%**	**8%**
Marlborough	11%	11%	36%	16%	13%	13%
Devizes	12%	15%	35%	15%	12%	11%
Tidworth & Ludgershall	13%	20%	38%	14%	9%	6%
Malmesbury	10%	13%	38%	16%	13%	9%
Royal Wootton Bassett	13%	11%	39%	16%	11%	10%
Calne	13%	14%	39%	14%	10%	9%
Corsham	11%	13%	36%	17%	13%	10%
Amesbury	13%	16%	40%	13%	9%	8%

3.1.6 The table does show any notable differences between locations with and without stations, with the exception of Tidworth where there is a higher proportion of residents in the 25-34 age group, perhaps driven by Army bases in the area.

3.1.7 The area has a growing population, including a high level of growth in the working age population while the number of over-65s is set to further increase. For example between 2001 and 2011 the adult population of Swindon increased by 17% and in Wiltshire by 7%. The greatest levels of growth came from people aged 55 and over. All age categories saw an increase except for the 25-34 age group declined, including a steep decline of 17% in Wiltshire, suggesting that younger people may be moving away from the area. The table below presents these percentage changes.

Table 3. Percentage change in adult age groups 2001-2011 Swindon & Wiltshire Area

AGE GROUP	SWINDON	WILTSHIRE	TOTAL
All Groups	17%	7%	10%
16-24	23%	7%	12%
25-34	3%	-17%	-10%
35-54	20%	6%	10%
55-64	32%	26%	27%
65-74	11%	21%	18%
75+	15%	10%	11%

3.1.8 There may be a number of reasons that the 25-34 age group has declined. This could be a function of broader trends towards young people moving to larger cities for education and employment, but may also be driven by local factors for example the lack of higher education opportunities in the area.

3.2 Health

3.2.1 84% of residents in Swindon and Wiltshire are in good or very good health with only 4% reporting bad or very bad health, which is comparable with the national average. In addition, data on life expectancy indicates that this is in line with national average at 80 for males and 83 for females. In terms of factors which contribute to a person’s health and wellbeing, 71% in of the adult population in Swindon are considered to be obese or overweight, while over a quarter are considered to be inactive (27.4%). This is significantly higher than the national average where 63.8% of adults are either obese or overweight.

3.2.2 In addition there are disparities within this picture with people who live in the least deprived communities within Swindon living an average of 13 years longer in good health than those living in the most deprived areas of Swindon.

3.2.3 An analysis has been undertaken examining the age profile within a 5km catchment of the rail stations within Swindon and Wiltshire. The table above looking at the typical self-reported health of residents does not show any noticeable variations across the area.

Table 4. Level of General Health in rail served towns

STATION	VERY GOOD OR GOOD HEALTH	FAIR HEALTH	BAD OR VERY BAD HEALTH
Wiltshire LA	**84%**	**12%**	**4%**
Swindon LA	**84%**	**12%**	**4%**
Avoncliff	85%	11%	4%
Bedwyn	86%	11%	3%
Bradford-on-Avon	82%	14%	4%
Chippenham	85%	11%	4%
Dean	86%	11%	3%
Melksham	82%	13%	5%
Pewsey	84%	12%	4%
Salisbury	83%	13%	4%
Swindon	84%	12%	4%
Tisbury	82%	14%	4%
Trowbridge	83%	13%	4%
Warminster	83%	13%	4%
Westbury*	82%	13%	5%

*for Dilton Marsh the centre of the MSOA serving this station was allocated to Westbury station

3.2.4 In terms of access to health facilities, SWLEP is served by three NHS foundation trusts (Great Western Hospitals, Royal United Hospital and Salisbury) with two hospitals within the area are at Salisbury and Swindon and communities to the west of Wiltshire being served by Royal United Hospital in Bath. None of these facilities are particularly well served by the rail network with both Great Western Hospital and Salisbury being approximately 3km from the nearest station, while Royal United Hospital at bath is approximately 1.5km from Oldfield station, however there is a 10 minute shuttle bus to the site from Bath Spa Station. The table below presents results for non-rail served towns.

Table 5. Level of General Health in non rail served towns

STATION	VERY GOOD OR GOOD HEALTH	FAIR HEALTH	BAD OR VERY BAD HEALTH
Wiltshire LA	**84%**	**12%**	**4%**
Swindon LA	**84%**	**12%**	**4%**
Marlborough	85%	12%	4%
Devizes	83%	13%	4%
Tidworth & Ludgershall	87%	10%	3%
Malmesbury	86%	10%	3%
Royal Wootton Bassett	81%	14%	5%
Calne	84%	12%	4%
Corsham	84%	12%	4%
Amesbury	84%	12%	4%

3.2.5 The results for non rail towns do not show any discernible differences from those towns with rail stations

3.3 Skills and qualifications

3.3.1 High quality skills are particularly important to high value sectors and to stimulate innovation**. 39% of Swindon and Wiltshire have NVQ4+ or higher which is comparable with the national average** and as mentioned previously in this annex **SWLEP has a low proportion of residents with no qualification** (4 percentage points lower than the national average[13]).

3.3.2 Participation in higher education is lower than the national average(Swindon 34%, Wiltshire 46% national average 51%) with the lowest participation levels concentrated in the urban areas. This may be influenced in part by the lack of university within the SWLEP area.

3.3.3 **Access to higher and further education in Swindon and Wiltshire has been identified as an issue by the LEP.** Provision is currently provided by Wiltshire College which has a number of sites across the county focussed around the Trans Wilts rail corridor, with the site at Chippenham being adjacent to the station. The college provides degree-level courses; these are, however, accredited by other institutions. The LEP has an aspiration for the development of a new University to serve the Swindon and Wiltshire area with the aim of retaining young people in the area by equipping them with the skills required in the Swindon and Wiltshire economy, and to reduce the number who leave the area. It is also seen as a way of increasing the pool of skilled labour in the area by attracting students from further afield. Whilst the concept of a new University has been developed a site has not been confirmed. However locating the campus (or campuses) close to the railway would help to make such a University a more attractive proposition for potential students. A suitable location would allow local students (who may have low car ownership levels) to access the locations by rail and other public transport, whilst a position on the long distance rail network may make the site attractive to students from across the country who would wish to travel home or to see friends from their University base.

3.3.4 An analysis has been undertaken examining the qualification profile within a 5km catchment of the rail stations within Swindon and Wiltshire, the results highlight an interesting pattern. There are a number of stations with a much higher than average proportion of households with Level 4 qualifications (Degree level and above). These include, Bradford-on-Avon, Dean, Avoncliff and Tisbury. This pattern suggests a correlation with age and may reflect professionals retiring to the area from elsewhere.

3.3.5 Level 2 and 3 qualifications are broadly similar to the average for Wiltshire and Swindon as a whole. With the exception of Swindon there are however a number of areas where there are a high proportion of households with no qualifications or Level 1 qualifications. The most notable of these are Melksham and Westbury and to an extent Trowbridge. This finding suggests that there may a limited pool of skilled jobs in these area and that opportunities to commute to employment may also be limited. The historic quality of the rail service at Melksham would tend to support this, whilst Westbury although having direct services to a high number of destinations is constrained by poor service frequencies, as well as limited opportunities within the town itself.

[13] Swindon and Wiltshire Economic Assessment, May 2018,SWLEP

Table 6. Qualifications in rail served towns

STATION	NONE	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
Wiltshire LA	**18%**	**14%**	**17%**	**13%**	**30%**
Swindon LA	**20%**	**17%**	**17%**	**12%**	**23%**
Avoncliff	14%	10%	15%	11%	45%
Bedwyn	16%	12%	16%	13%	36%
Bradford-on-Avon	17%	9%	14%	10%	43%
Chippenham	16%	14%	18%	13%	31%
Dean	15%	11%	16%	12%	39%
Melksham	21%	17%	18%	12%	22%
Pewsey	17%	13%	16%	13%	34%
Salisbury	19%	12%	16%	12%	33%
Swindon	20%	18%	17%	12%	23%
Tisbury	19%	11%	15%	12%	36%
Trowbridge	20%	16%	18%	13%	25%
Warminster	20%	14%	18%	13%	26%
Westbury	21%	17%	18%	13%	23%

3.3.6 The table below presents the level of qualifications in towns without rail stations.

Table 7. Qualifications in non rail served towns

STATION	NONE	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
Wiltshire LA	**18%**	**14%**	**17%**	**13%**	**30%**
Swindon LA	**20%**	**17%**	**17%**	**12%**	**23%**
Marlborough	18%	12%	16%	10%	37%
Devizes	20%	15%	17%	13%	27%
Tidworth & Ludgershall	17%	16%	19%	14%	26%
Malmesbury	16%	12%	15%	12%	39%
Royal Wootton Bassett	23%	17%	17%	12%	24%
Calne	20%	15%	18%	14%	25%
Corsham	18%	13%	17%	12%	33%
Amesbury	19%	17%	18%	14%	24%

3.3.7 The level of qualifications in non rail served towns shows is largely similar to rail served towns, other than to note that around half of the non rail served towns have a lower than average number of people with Level 4 qualifications.

3.4 Deprivation

3.4.1 **The indices of Multiple Deprivation indicate that SWLEP suffers from the highest levels of deprivation in urban areas including Swindon, Chippenham, Melksham, Trowbridge, Westbury and Salisbury**. Some communities with in Swindon and Wiltshire are ranked amongst the top 20% of most deprived areas nationally. **Hidden deprivation occurs in rural areas within Wiltshire, where there are pockets of high levels of poverty and very limited access to services**. Rural poverty is often not visible in broader statistics for rural areas where cost of living can be higher due to issues such as increased travel costs, increased housing costs and more limited access to key services for those without access to a private car.

3.4.2 An analysis has been undertaken examining the deprivation profile within a 5km catchment of the rail stations within Swindon and Wiltshire. The results below support the previous statements with the larger more urban settlements such as Swindon or Salisbury tending to have higher levels of deprivation than smaller settlements such as Dean. There is no evidence to suggest a correlations (causal or otherwise) between deprivation and the level of rail service.

3.4.3 The table below sets out the results for household deprivation.

Table 8. Household Deprivation levels by Station (No. of Dimensions %) Source: ONS 2011 Census

STATION	ZERO DIMENSIONS	1 DIMENSION	2 DIMENSIONS	3 DIMENSIONS	4 DIMENSIONS
Wiltshire LA	**50%**	**32%**	**15%**	**3%**	**0.3%**
Swindon LA	**45%**	**32%**	**17%**	**4%**	**0.4%**
Avoncliff	56%	30%	12%	2%	0%
Bedwyn	55%	30%	12%	2%	0%
Bradford-on-Avon	53%	30%	14%	3%	0%
Chippenham	52%	31%	14%	3%	0%
Dean	56%	30%	12%	1%	0%
Melksham	45%	34%	17%	4%	0%
Pewsey	52%	31%	14%	2%	0%
Salisbury	48%	32%	15%	4%	0%
Swindon	45%	32%	18%	4%	0%
Tisbury	49%	34%	14%	3%	0%
Trowbridge	46%	33%	17%	4%	0%
Warminster	46%	34%	16%	3%	0%
Westbury	46%	34%	17%	4%	0%

3.4.4 The table below presents the level of deprivation in non-rail served towns.

Table 9. Household Deprivation levels by Non Rail Served Town (No. of Dimensions %) Source: ONS 2011 Census

STATION	ZERO DIMENSIONS	1 DIMENSION	2 DIMENSIONS	3 DIMENSIONS	4 DIMENSIONS
Wiltshire LA	**50%**	**32%**	**15%**	**3%**	**0.3%**
Swindon LA	**45%**	**32%**	**17%**	**4%**	**0.4%**
Marlborough	51%	32%	14%	3%	0%
Devizes	46%	33%	16%	3%	0%
Tidworth & Ludgershall	51%	32%	13%	3%	0%
Malmesbury	56%	29%	12%	3%	0%
Royal Wootton Bassett	42%	34%	20%	4%	1%
Calne	48%	33%	15%	4%	0%
Corsham	50%	31%	15%	3%	0%
Amesbury	49%	33%	16%	3%	0%

3.4.5 The table shows that there is no significant difference in the level of deprivation between rail served and non-rail served towns.

3.5 Impact of rail on house prices

3.5.1 Access to rail services may have a substantial impact on house prices. A report by GL Hearn[14] for Central Bedfordshire Council examined the impact that the development of East West Rail might have on house price values around Bedford and Sandy. The study presented the findings of qualitative work with Estate Agents across the South East on the premium associated with access to rail services, before presenting the findings of modelling work. The qualitative work suggested that a premium of between 5% and 10% could be identified between homes located within walking distance of a stations and equivalent homes which were not. However given that the case study sits close to both London and the relatively overheated housing market around Cambridge it is felt that the lower bands of a 3% to 5% premium might be more applicable to Wiltshire.

3.5.2 As part of this study SYSTRA has conducted analysis of the issue using publicly available data on house prices at MSOA level over a 20 year period from 1997. We have examined the impact of catchment bands from station in term of their impact on average house prices relative to the average for the study area. Due to limitation in the data it was not possible to conduct this analysis for the Swindon & Wiltshire area in isolation, instead we examined stations located in the following local authority areas, centred on the Bristol area:

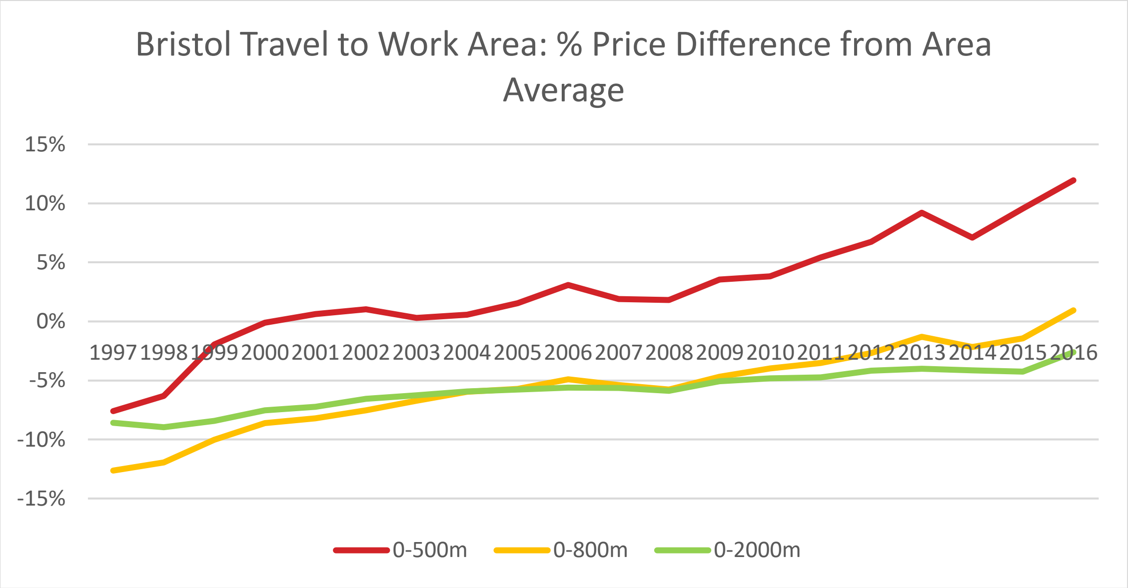
- Swindon
- Wiltshire
- Gloucester
- South Gloucestershire

[14] GL Hearn, Capita and LDA (2017), Development gain and economic benefit, from East West Rail in Central Bedfordshire. Report for Central Bedfordshire Council

- Stroud
- Bristol (excluding Bristol Temple Meads catchment)
- Bath & North East Somerset
- North Somerset
- Stroud

3.5.3 Over a 20 year period from 1997 we have compared the percentage difference between MSOAs with a centroid within 500m, 800m and 2000m of a station with the average house price for the study area as a whole. This is shown in the figure below.

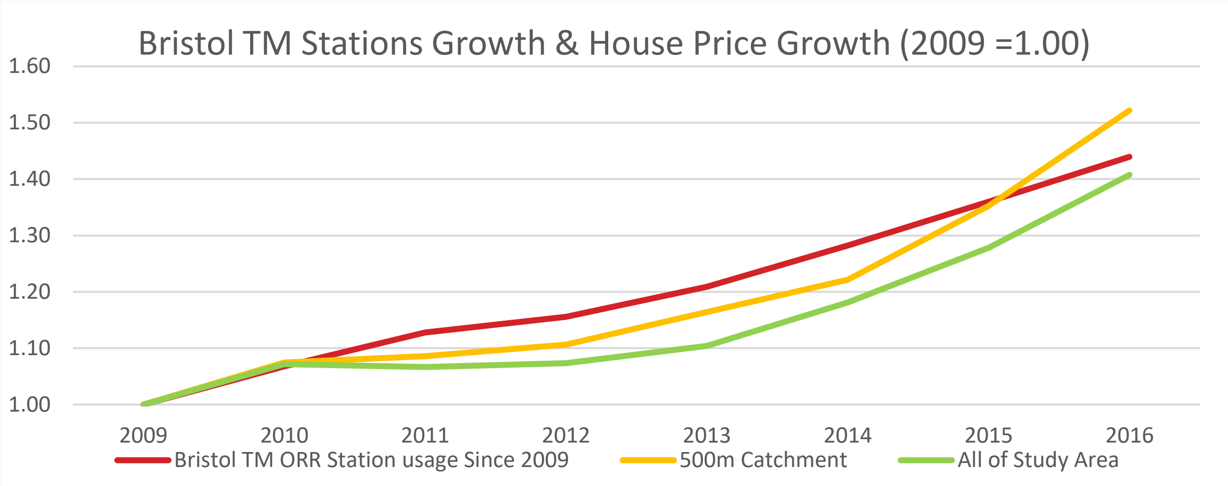
Figure 6. Station Catchment House Prices: Differences from area average



3.5.4 The table shows that over the last 20 years the difference in price for MSOAs within 500m of a station from the area average has changed substantially. **In 1997 areas close to stations were worth 8% less than the area average but this had grown to a 12% premium by 2016.** For homes up to 800m from a station a similar pattern exists where historically such areas were 13% below the average but this has changed to being 1% above the average. It is likely that there are many factors influencing these results such as the growth in town centre living and the regeneration of town centres close to stations, however rail may also have role within such wider regeneration. Over the 20 year period as a whole the average price difference is 3%.

3.5.5 We have also compared station usage at Bristol Temple Meads (the likely destination of many rail trips from this area), with house price growth within the 500m catchment and the whole of the study area over the period 2009 to 2016.

Figure 7. Bristol TM Station Usage and Study Area House Price Growth



3.5.6 It can be seen that house price growth within a 500m catchment has grown at a faster rate than the study area as a whole. This period does include the recovery from the 2007 recession, where unusually rail patronage did not decline whilst the economy was in recession, breaking historic trends. It is possible that the attractiveness of rail helped to maintain house prices. Whilst there may be many factors that influence the growth in house prices, it appears that a trend based on rail travel may exist.

3.5.7 **Whilst the above has shown that the presence of rail service may have an impact on house prices there is also evidence that development located close to a rail station may support the investment case**. Within a DfT report on Capturing Housing impacts in transport appraisal it is demonstrated how the release of dependent housing helped to justify the case for investment in Kirkstall Forge station near Leeds[15]. At this location over 1,000 housing units depended on the opening of the rail station. Using conventional appraisal techniques a Benefit Cost Ratio of 1.00 was achieved, representing low value for money. However with the inclusion of the value of only 18% of the released development the case was improved to deliver a Benefit Cost Ratio of 2.00 representing high value for money; without this it may not have been possible to justify the station. Using 40% of the released development would generate very high value for money with a BCR of 4.00

3.5.8 It can be seen from this that evidence exists for the railway having a symbiotic relationship with housing development, and whilst an increase in house prices per se may not be an objective, the railway may have a role in releasing land for development to address wider housing shortages by making an area more attractive for developers, as well as helping residents to lead more a sustainable lifestyle with a wider range of opportunities to access work and leisure activities.

[15] DfT (2018) Capturing housing impacts in transport appraisal: Case Studies https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/736130/capturing-housing-impacts-in-transport-appraisal.pdf

4. CONCLUDING REMARKS

4.1 Summary

4.1.1 The central southern location of Swindon and Wiltshire provides a strong strategic position. It is well placed for access to London and the Greater South East, Wales and the Midlands. The area also has strong linkages to key airports including Heathrow and Bristol and coastal ports of Bristol, Southampton and Portsmouth.

4.1.2 The area has a growing population including a high level of growth in working age population aged above 34 while the number of over 65s is set to further increase, although the 25-34 year old group appears to be in decline. The growing working age population are attracted to the area by the high standard of living, attractive environment and employment opportunities. In order to accommodate this growing population, Swindon and Wiltshire are planning for significant growth in housing and employment by 2036. A joint spatial framework is being developed to sit alongside the individual Swindon and Wiltshire Local Plan documents and set out the overall scale and distribution of housing and employment identifying strategic employment locations and infrastructure requirements.

4.1.3 Addressing the decline in the number of people in the 25-34 age group in particular may require different types of interventions including a focus on affordable housing, and improved local access to higher education with links in jobs in the local area. Rail may have a role to play in providing access to education and in ensuring access between local centres to provide access to employment.

4.1.4 Swindon and Wiltshire has a prosperous economy with a mix of modern industries attracting considerable inward investment from national and international businesses. In terms of small and medium sized businesses the area also has a good record of business survival rates, consistently performing above the national average, however productivity and GVA growth has been lower than the national average.

4.1.5 A number of Growth Zones have been identified within the Strategic Economic Plan; these have the potential to have the greatest impact in terms of growth of Swindon and Wiltshire. The zones are as follows;

- Swindon – M4 Growth Zone
- A350 Growth Zone
- Salisbury A303 Growth Zone

4.1.6 Transport has a key role to play in the effective delivery of the Growth Zones as transport can increase the effective density of a location by increasing the number of people who can access the area quickly.

4.1.7 The SEP has identified key sectors which have good prospects for growth. These are identified as priority sectors for Swindon and Wiltshire and include;

- Advanced engineering and high value manufacturing
- Health and life sciences
- Financial and professional services
- Digital and information and communications technology
- Land based industries

4.1.8 Innovation is central to the Strategic Economic Plan; this is typified by the number of global investors who have invested and continued to prosper in the area and the high presence of innovation sectors including health and life sciences, pharmaceuticals, mobile telecommunications, digital and high value manufacturing.

4.1.9 The socio-economic geography of the area is very diverse, differing considerably between the north, centre and south. The contrasting character of the area results in a range and variety of complex connections and plays an important role in shaping the future plans for growth , investment and infrastructure.

4.1.10 It is clear that the transport system will play a significant role in supporting planned housing and economic growth in the SWLEP area. Substantial upgrades and improvements are, however, needed to accommodate the increase in demand across all modes.

4.1.11 The rail network across SWLEP already has a strong foundation with which it can support the economy, however there is a scope for further improvement in both access to the network and the services provided to fully realise the role of the rail in the economy and community of Swindon and Wiltshire.

4.2 Delivering the area’s priorities

4.2.1 Swindon and Wiltshire have a number of strengths and opportunities, which have been discussed earlier in this chapter, however there are clearly a number of key challenges for the area to address in order for it to fulfil its potential and realise its growth ambitions. These key challenges are summarised below:

- Transport challenges: As highlighted in the previous section the area currently experiences inadequate transport infrastructure to support expansion plans. With journey time reliability and delays undermining the attractiveness of the areas current offer and limited rail connections and opportunities not delivering the full potential of SWLEPs strategic position.
- Perceived poor image: Swindon does not project the image of the area’s thriving knowledge intensive economy. Regeneration of the town centre is essential to realise the potential of the Swindon – M4 Growth Zone. The relationship between rail stations and the area they serve might also be improved at other stations in Wiltshire.
- The delivery of major housing developments and employment sites including two of the largest planned urban extensions in the country at Wichelstowe and New Eastern Villages in Swindon.
- A growing workforce but productivity gains are slowing. Need to increase productivity in the face of a growing population. Investing in the right infrastructure and ensuring the area attracts businesses which create value and encourages other businesses to grow.

4.2.2 In addressing these priorities, a symbiotic relationship between the railway and the local economy can be developed, with the railway gaining passengers from increased demand as a result of the growth of the economy whilst simultaneously the economy benefits from the improved connectivity provided by improved rail services and access.

SYSTRA provides advice on transport, to central, regional and local government, agencies, developers, operators and financiers.

A diverse group of results-oriented people, we are part of a strong team of professionals worldwide. Through client business planning, customer research and strategy development we create solutions that work for real people in the real world.

For more information visit www.systra.co.uk

Birmingham – Newhall Street
5th Floor, Lancaster House, Newhall St,
Birmingham, B3 1NQ
T: +44 (0)121 393 4841

Birmingham – Edmund Gardens
1 Edmund Gardens, 121 Edmund Street,
Birmingham B3 2HJ
T: +44 (0)121 393 4841

Dublin
2nd Floor, Riverview House, 21-23 City Quay
Dublin 2,Ireland
T: +353 (0) 1 566 2028

Edinburgh – Thistle Street
Prospect House, 5 Thistle Street, Edinburgh EH2 1DF
United Kingdom
T: +44 (0)131 460 1847

Glasgow – St Vincent St
Seventh Floor, 124 St Vincent Street
Glasgow G2 5HF United Kingdom
T: +44 (0)141 468 4205

Glasgow – West George St
250 West George Street, Glasgow, G2 4QY
T: +44 (0)141 468 4205

Leeds
100 Wellington Street, Leeds, LS1 1BA
T: +44 (0)113 360 4842

London
3rd Floor, 5 Old Bailey, London EC4M 7BA United Kingdom
T: +44 (0)20 3855 0079

Manchester – 16th Floor, City Tower
16th Floor, City Tower, Piccadilly Plaza
Manchester M1 4BT United Kingdom
T: +44 (0)161 504 5026

Newcastle
Floor B, South Corridor, Milburn House, Dean Street, Newcastle, NE1 1LE
United Kingdom
T: +44 (0)191 249 3816

Perth
13 Rose Terrace, Perth PH1 5HA
T: +44 (0)131 460 1847

Reading
Soane Point, 6-8 Market Place, Reading,
Berkshire, RG1 2EG
T: +44 (0)118 206 0220

Woking
Dukes Court, Duke Street
Woking, Surrey GU21 5BH United Kingdom
T: +44 (0)1483 357705

Other locations:

France:
Bordeaux, Lille, Lyon, Marseille, Paris

Northern Europe:
Astana, Copenhagen, Kiev, London, Moscow, Riga, Wroclaw

Southern Europe & Mediterranean: Algiers, Baku, Bucharest,
Madrid, Rabat, Rome, Sofia, Tunis

Middle East:
Cairo, Dubai, Riyadh

Asia Pacific:
Bangkok, Beijing, Brisbane, Delhi, Hanoi, Hong Kong, Manila, Seoul, Shanghai, Singapore, Shenzhen, Taipei

Africa:
Abidjan, Douala, Johannesburg, Kinshasa, Libreville, Nairobi

Latin America:
Lima, Mexico, Rio de Janeiro, Santiago, São Paulo

North America:
Little Falls, Los Angeles, Montreal, New-York, Philadelphia, Washington