

Railway Industry Association: Industry Survey – November 2020

Methodology: Savanta ComRes interviewed 257 railway business leaders in the UK rail supply chain between 17th September and 9th October 2020. Savanta ComRes is a member of the British Polling Council and abides by its rules. Full tables at www.comresglobal.com

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BASE: All respondents	

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Q1. How likely, if at all, do you think it is that the rail supply industry will grow or contract in the coming year?

BASE: All respondents

	Total	Expectations for the industry in the coming year		Expectations for their business in the coming year		Impact of Covid-19 on their business' outlook		Confidence in that the Government will promote the railway industry in trade deals	
		Grow	Contract	Grow	Contract	Improved	Worsened	Confident	Not confident
Significance Level: 95%		a	b	a	b	*a	b	a	b
Total	257 100%	91 100%	93 100%	130 100%	53 100%	25 100%	156 100%	72 100%	102 100%
Very likely to grow (5.0)	32 12%	32 35% b	- -	28 22% b	2 4%	9 36%	16 10%	18 25% b	5 5%
Quite likely to grow (4.0)	59 23%	59 65% b	- -	49 38% b	4 8%	9 36%	26 17%	27 38% b	16 16%
Likely to neither grow, nor contract (3.0)	63 25%	- -	- -	29 22%	9 17%	3 12%	40 26%	9 13%	32 31% a
Quite likely to contract (2.0)	80 31%	- -	80 86% a	21 16% b	28 53% a	3 12%	59 38%	17 24%	34 33%
Very likely to contract (1.0)	13 5%	- -	13 14% a	- -	9 17% a	1 4%	9 6%	1 1%	8 8%
Don't know	10 4%	- -	- -	3 2%	1 2%	- -	6 4%	- -	7 7% a
NET: Grow	91 35%	91 100% b	- -	77 59% b	6 11%	18 72%	42 27%	45 63% b	21 21%
NET: Contract	93 36%	- -	93 100% a	21 16% a	37 70% a	4 16%	68 44%	18 25%	42 41% a
Base for stats	247	91	93	127	52	25	150	72	95
Mean Score	3.07	4.35 b	1.86	3.66 b	2.27	3.88	2.87	3.61 b	2.75
Standard Deviation	1.137	.480	.349	1.002	.972	1.166	1.107	1.145	1.010
Standard Error	.072	.050	.036	.089	.135	.233	.090	.135	.104
Error variance	.01	*	*	.01	.02	.05	.01	.02	.01

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Q2. How likely, if at all, do you think it is that your business will grow or contract in the coming year?

BASE: All respondents

	Total	Expectations for the industry in the coming year		Expectations for their business in the coming year		Impact of Covid-19 on their business' outlook		Confidence in that the Government will promote the railway industry in trade deals	
		Grow	Contract	Grow	Contract	Improved	Worsened	Confident	Not confident
Significance Level: 95%		a	b	a	b	*a	b	a	b
Total	257 100%	91 100%	93 100%	130 100%	53 100%	25 100%	156 100%	72 100%	102 100%
Very likely to grow (5.0)	30 12%	28 31% b	- -	30 23% b	- -	11 44%	14 9%	17 24% b	5 5%
Quite likely to grow (4.0)	100 39%	49 54% b	21 23%	100 77% b	- -	11 44%	55 35%	34 47% b	32 31%
Likely to neither grow, nor contract (3.0)	64 25%	7 8%	34 37% a	- -	- -	2 8%	43 28%	8 11%	33 32% a
Quite likely to contract (2.0)	42 16%	5 5%	30 32% a	- -	42 79% a	1 4%	32 21%	10 14%	21 21%
Very likely to contract (1.0)	11 4%	1 1%	7 8% a	- -	11 21% a	- -	7 4%	2 3%	5 5%
Don't know	10 4%	1 1%	1 1%	- -	- -	- -	5 3%	1 1%	6 6%
NET: Grow	130 51%	77 85% b	21 23%	130 100% b	- -	22 88%	69 44%	51 71% b	37 36%
NET: Contract	53 21%	6 7%	37 40% a	- -	53 100% a	1 4%	39 25%	12 17%	26 25%
Base for stats	247	90	92	130	53	25	151	71	96
Mean Score	3.39	4.09 b	2.75	4.23 b	1.79	4.28	3.25	3.76 b	3.11
Standard Deviation	1.045	.843	.897	.423	.409	.792	1.039	1.062	.983
Standard Error	.066	.089	.094	.037	.056	.158	.085	.126	.100
Error variance	*	.01	.01	*	*	.03	.01	.02	.01

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Q3. What impact, if any, has the Coronavirus (COVID-19) pandemic had on your business' outlook for the coming year?

BASE: All respondents

	Total	Expectations for the industry in the coming year		Expectations for their business in the coming year		Impact of Covid-19 on their business' outlook		Confidence in that the Government will promote the railway industry in trade deals	
		Grow	Contract	Grow	Contract	Improved	Worsened	Confident	Not confident
Significance Level: 95%		a	b	a	b	*a	b	a	b
Total	257 100%	91 100%	93 100%	130 100%	53 100%	25 100%	156 100%	72 100%	102 100%
Significantly improved (5.0)	5 2%	5 5% b	- -	5 4%	- -	5 20%	- -	4 6% b	- -
Somewhat improved (4.0)	20 8%	13 14% b	4 4%	17 13% b	1 2%	20 80%	- -	10 14% b	5 5%
No impact (3.0)	66 26%	29 32%	19 20%	36 28%	11 21%	- -	- -	24 33%	24 24%
Somewhat worsened (2.0)	131 51%	37 41%	53 57% a	62 48%	29 55%	- -	131 84%	28 39%	51 50%
Significantly worsened (1.0)	25 10%	5 5%	15 16% a	7 5%	10 19% a	- -	25 16%	5 7%	14 14%
Don't know	10 4%	2 2%	2 2%	3 2%	2 4%	- -	- -	1 1%	8 8%
NET: Improved	25 10%	18 20% b	4 4%	22 17% b	1 2%	25 100%	- -	14 19% b	5 5%
NET: Worsened	156 61%	42 46%	68 73% a	69 53%	39 74% a	- -	156 100%	33 46%	65 64% a
Base for stats	247	89	91	127	51	25	156	71	94
Mean Score	2.39	2.73 b	2.13	2.61 b	2.06	4.20	1.84	2.72 b	2.21
Standard Deviation	.852	.974	.733	.926	.705	.408	.368	.988	.760
Standard Error	.054	.103	.077	.082	.099	.082	.029	.117	.078
Error variance	*	.01	.01	.01	.01	.01	*	.01	.01

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Q4. On a scale from 1 to 5 where 1 is not at all confident and 5 is very confident, how confident are you that the Government will promote the railway industry as one of its key economic sectors when negotiating future trade deals?

BASE: All respondents

	Total	Expectations for the industry in the coming year		Expectations for their business in the coming year		Impact of Covid-19 on their business' outlook		Confidence in that the Government will promote the railway industry in trade deals	
		Grow	Contract	Grow	Contract	Improved	Worsened	Confident	Not confident
Significance Level: 95%		a	b	a	b	*a	b	a	b
Total	257 100%	91 100%	93 100%	130 100%	53 100%	25 100%	156 100%	72 100%	102 100%
5 - Very confident (5.0)	13 5%	9 10% b	2 2%	9 7%	2 4%	2 8%	8 5%	13 18% b	- -
4 (4.0)	59 23%	36 40% b	16 17%	42 32%	10 19%	12 48%	25 16%	59 82% b	- -
3 (3.0)	77 30%	24 26%	31 33%	38 29%	15 28%	4 16%	57 37%	- -	- -
2 (2.0)	62 24%	12 13%	26 28% a	21 16%	12 23%	3 12%	38 24%	- -	62 61% a
1 - Not at all confident (1.0)	40 16%	9 10%	16 17%	16 12%	14 26% a	2 8%	27 17%	- -	40 39% a
Don't know	6 2%	1 1%	2 2%	4 3%	- -	2 8%	1 1%	- -	- -
NET: Confident	72 28%	45 49% b	18 19%	51 39% b	12 23%	14 56%	33 21%	72 100% b	- -
NET: Not confident	102 40%	21 23%	42 45% a	37 28%	26 49% a	5 20%	65 42%	- -	102 100% a
Base for stats	251	90	91	126	53	23	155	72	102
Mean Score	2.77	3.27 b	2.58	3.06 b	2.51	3.39	2.67	4.18 b	1.61
Standard Deviation	1.131	1.130	1.044	1.141	1.187	1.118	1.100	.387	.491
Standard Error	.071	.119	.109	.102	.163	.233	.088	.046	.049
Error variance	.01	.01	.01	.01	.03	.05	.01	*	*