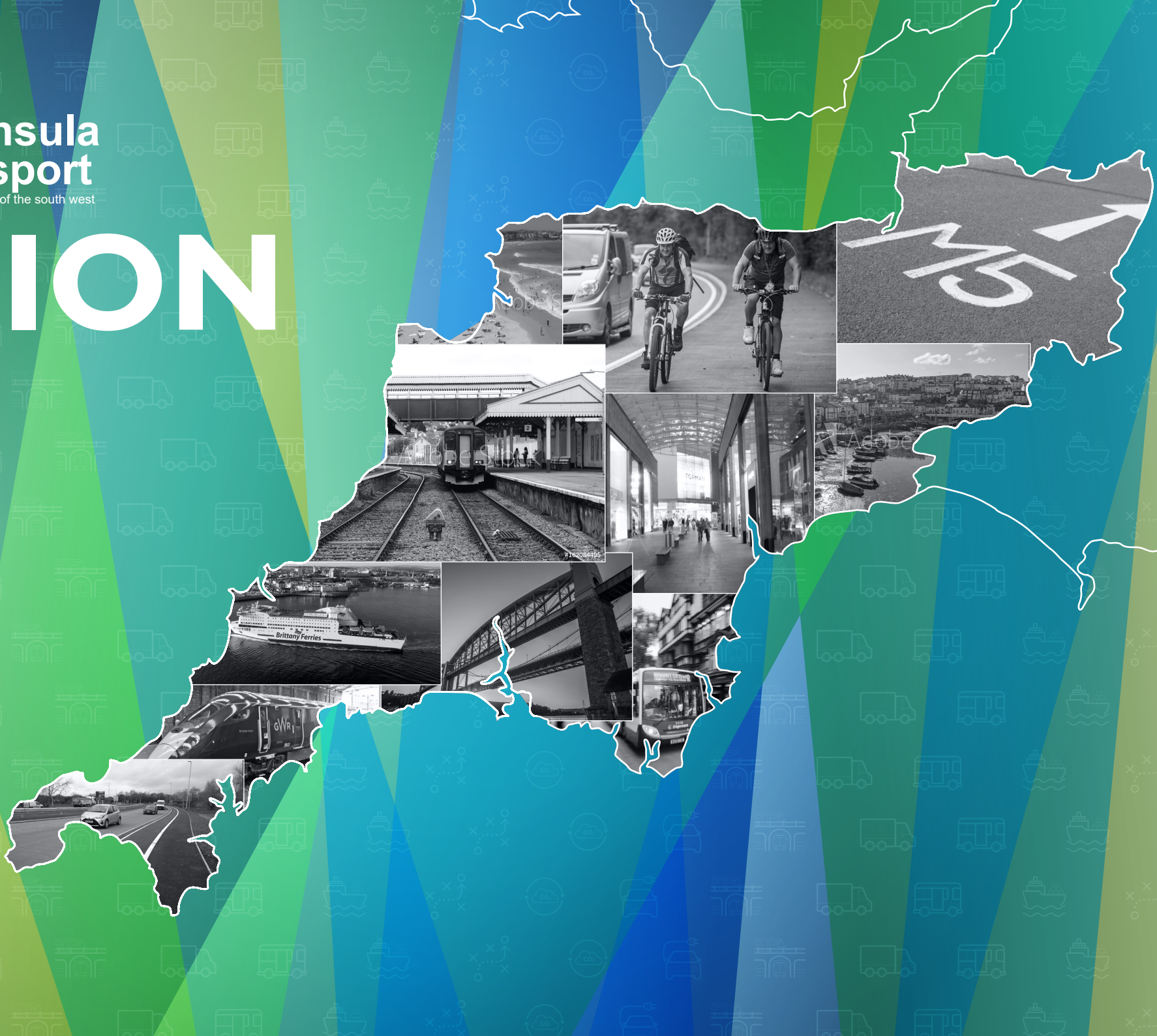




**Peninsula  
Transport**

Transforming the economic performance of the south west

# VISION



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# FOREWORD FROM THE CHAIR

## Welcome to the future of transport in the peninsula.

The local authorities for Cornwall, Devon, Plymouth, Somerset and Torbay are working together to plan and prioritise strategic infrastructure across the peninsula. This is a positive development and means we can speak as one voice to Government - the Peninsula Transport Sub National Transport Body - on behalf of the region with support from key stakeholders.

The South West economy depends on moving goods and people efficiently across the peninsula as well as being well connected with the rest of the country. Our partnership will focus on improving strategic transport links whilst each local authority will continue to address local issues.

The South West peninsula is an amazing place to live and work. Good transport connections are vital for much of our activity, so our vision is to enhance our transport system for everyone.

We want more efficient, resilient and cleaner transport that can help make the peninsula even better. Over the coming months we invite you to work with us to develop a plan to shape the future of transport in the region. We want a future that works for people, businesses and the planet – now and for decades to come.

Following a public consultation on this document, we would like to thank those who took the time to respond and provide feedback. Support for our vision and goals was overwhelmingly positive and we have adopted them ahead of the development of our full Transport Strategy later in 2022.

We look forward to working with you to develop a long term plan for our region.

*Andrea Davis, Chair  
Peninsula Transport*



“ The South West Peninsula is an amazing place to live and work. Transport connections are vital for much of our activity and so our vision is for an enhanced transport system: more efficient, resilient and cleaner – helping to make the Peninsula even better.





# OUR VISION

“ Transforming transport across the peninsula to enable our society and economy to thrive and our unique and outstanding environment to flourish

Transport is at the heart of everyday life – going to work or school, visiting family and friends, delivering parcels and medicines, as well as shopping and leisure – yet we often take it for granted. Reliable and resilient transport options are critical for our residents, businesses and visitors, both in rural and urban areas.

The vision for transport has been developed by Peninsula Transport. This is the Sub-National Transport Body (STB) for the South West Peninsula (See fact sheets on p16 for more details). We are working closely with stakeholders and Government to shape infrastructure solutions to meet the needs of our region.

Delivering our plan will require close collaboration between stakeholders within and beyond the peninsula, including Government, businesses and the people who live and work here. As we endeavour to recover from the impacts of the

COVID-19 pandemic and rebuild our economy and society in an environmentally responsible way, we need an ambitious vision and strategy for transport in place.

Whilst the global impacts of the COVID-19 pandemic have changed the way we travel, it has also changed our perspective on when, where and how we travel. A long term transport plan can support our social, economic and environmental recovery from the current conditions.

The situation also gives us an opportunity to 'build back better'. We can harness the benefits of some of the lifestyle changes we have adopted since March 2020 and reduce carbon emissions from our transport system..



# OUR GOALS



**We will improve connections between people, businesses, and places**

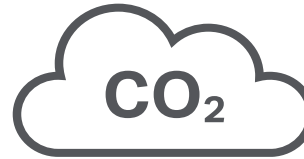
Investment into our strategic road and rail networks means more people can access transport options across the peninsula. Better access to transport reduces inequality in society with better access to education, skills and employment. It helps foster new jobs, new homes and, with careful planning, it can be sensitive to the environment.



**We will enhance the resilience of the transport network**

Resilience and reliability are fundamental to any good transport network. We want to enhance these factors across our peninsula, for both people and goods.

By providing better information, people are equipped to plan their journeys more efficiently, reducing journey time, increasing productivity and improving our region's ability to respond to climate change and/or severe weather events.



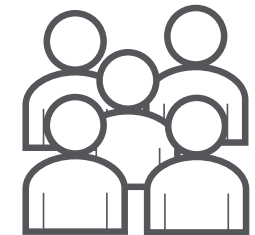
**We will deliver affordable, zero-emissions transport for everyone**

Our goal is to deliver a net-zero carbon transport system across the peninsula. By promoting walking and cycling alongside making the case for improvements to public transport, so that it fits the needs of more users, we can reduce demand for using cars. Together with better digital services enabling working from home, they can contribute towards a lower carbon future. Ultra low emission charging facilities will be essential to improving air quality and the switch away from fossil fuels, so we will work to deliver a charging/refuelling network for private and commercial use.



**We will help to improve the health and wellbeing of communities in the Peninsula**

Communities thrive where there is choice and access to better transport. Our aim is to improve affordability, choice, safety and opportunity to more communities and more people. We want to see improved public transport, linked to more walking and cycling options across the peninsula. We will provide information and enable more people to access a greater range of transport options.



**We will help the Peninsula to be a great place to live and work**

Our peninsula is a great place to live and work and we want to make it even better for everyone. By supporting the delivery of new homes and jobs in places where people have travel choices and the information they need, we can all benefit. Our outstanding natural environment and biodiversity are vital assets that must be considered at the start of, and throughout, our projects. We will take a collective, pragmatic approach, that maximises access to mobility but protects the very characteristics that make our peninsula so special.







# OUR CHALLENGES AND OPPORTUNITIES

Our transport strategy needs to respond to the challenges and opportunities we face - such as those set out below - including the rapidly changing societal, environmental and economic context. For instance, technological change and growing pollution is impacting on peoples' behaviours, and needs and expectations are shifting. It is therefore important our future transport plans are sufficiently flexible to adapt to these aspects.

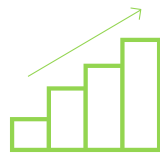
## Decarbonisation

Decarbonisation remains a priority for all of the authorities in the peninsula. The evidence from the lockdowns has revealed the scale of the challenge for the transport sector, as transport is still a substantial emitter of carbon. We will need to consider ways to either reduce demand for transport or reduce the carbon emitted by transport in the first place.



## World of Work

Productivity in the peninsula is below average. In part this is due to poor transport connections, which can constrain the physical access to markets which in turn impacts on the potential for inward investment, higher skilled jobs and employment opportunities. Improvements in logistical and freight corridors could transform our peninsula economy.



## Urbanisation

There is some emerging evidence that since the COVID-19 pandemic, there is a shift to people moving away from cities and areas of high population density. The peninsula already has the highest levels of inwards migration of any area in the UK, but levels may increase further as the South West and Wales are key areas identified in a variety of research as sought after for relocation after the lockdown.



## Digitalisation

The COVID-19 lockdowns demonstrated the adaptability of apps and online platforms to deliver features to inform and support the population, including for healthcare and education. In the transport sector this included the travel apps to help customers maintain social distancing. However the biggest disruptor in this field is liable to be the development of autonomous vehicle technology and its application on the highway network.



## Flexible Lifestyles

COVID-19 saw a sudden shift towards home working and allowed many employers to trial the approach and plan for a longer-term shift away from traditional office working. Online shopping activity also increased rapidly with the Office for National Statistics (ONS) reporting around 33% of all transactions online during the first UK lockdown compared with 20% before, creating far more deliveries and logistics operations.





# THE PENINSULA REGION

## Climate Emergency Declared



**Commitment to Net Zero**

All Peninsula authorities have declared a climate emergency

High-tech Manufacturing



Defence



Clean Energy



**Growth Sectors**

Medical Research



Agriculture

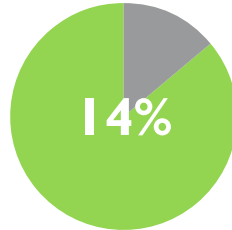


Tourism



Marine

## THE ECONOMY IS DIVERSE



No one sector accounts for more than 14% of output



Maritime Industry

£3bn GVA  
15,000 FTE employed

FTE employed

200k Homes (+24%)



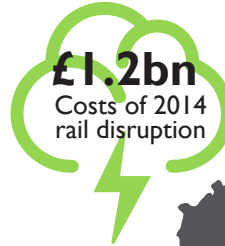
Forecast by 2040



170k Jobs (+19%)

## Network Resilience

£1.2bn Costs of 2014 rail disruption



£46bn

Economic Output in 2017

2.3m Population in 2019

25% Protected area



21m domestic visitors in 2017

72%

of visitors to the South West originating from outside of the region



56% Urban



44% Rural

2 in 5 people live in coastal areas

Older than average population



31% of population over 65 by 2041

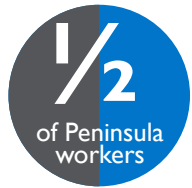


## Levelling Up

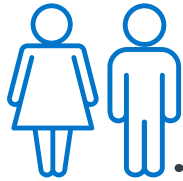
Cost of housing currently exceeds earnings in South West



# TRAVEL AND MOBILITY



travel less than **10km** to work



Highest private transport mileage per person in England



2nd highest private car ownership in England

No Access to Fast Broadband

Peninsula **9%**

UK **5%**

## Poor Digital Connectivity



**90+%**  
UK 4G coverage



**10%**  
Peninsula 4G coverage



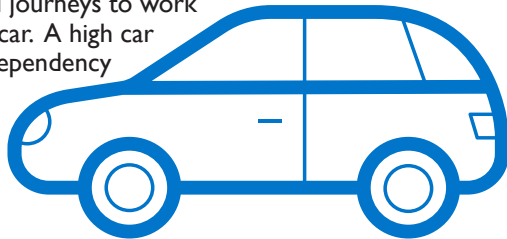
Average Speed MPH

West Coast Main Line	<b>90</b>
East Coast Main Line	<b>90</b>
London to South West	around <b>70</b>

## High Car Dependency

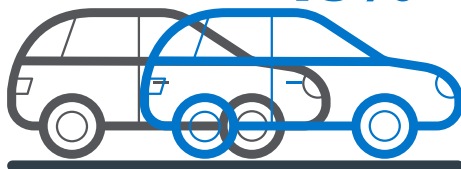
**~90%**

of all journeys to work are by car. A high car dependency

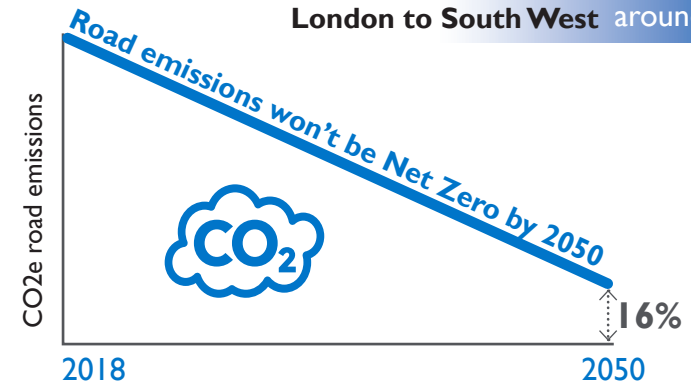
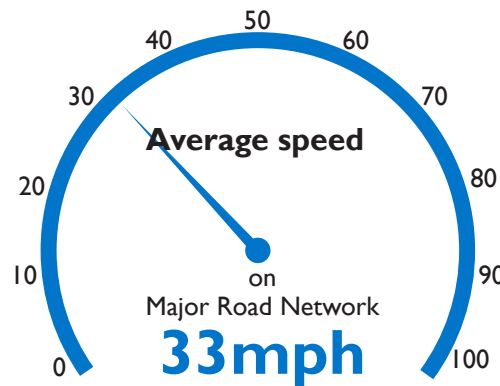


**6.5K**  
miles per year

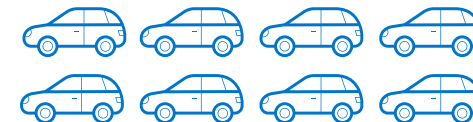
**+43%**



Increased distance travelled in cars forecast by 2050 – driven by population growth



## Potential impacts of COVID-19



**+78,000**  
car trips per day

if passengers do not return to public transport







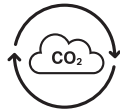
# DELIVERING FOR THE PENINSULA

To ensure that our Peninsula Transport Strategy is robust and well informed, we have commissioned a range of technical studies with support from the Department for Transport. These will be delivered over the next 12 months.

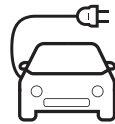
## Summary of strategies and studies to support the development of the Full Transport Strategy



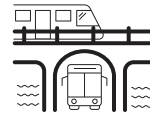
Strategic Economic Corridor Studies



Carbon Transition Strategy



Technology and Electric Vehicle Strategy



Rail Strategy



Freight Strategy



Rural Mobility



International Gateway Study

### Summary

Building on the work undertaken in our Economic Connectivity Study, this is a more detailed examination of the function and operation of the most important transport corridors in the region.

Assessment of scenarios for transitioning to low carbon and Net- Zero mobility futures including a phased plan outlining the steps required to achieve transition.

Strategy for integration of technologies including public transport, Intelligent Traffic Control, and new mobility opportunities, such as connected and autonomous vehicles (CAVs) and zero emissions vehicles (ZEVs).

Building on the Peninsula Rail Task Force's 20-year plan this is an in-depth examination of specific travel corridors, working with strategic partners including Network Rail and Western Gateway.

This strategy builds an evidence base of freight requirements and will develop a plan for more efficient distribution. Consideration of last mile delivery and community and environmental needs.

This study focusses on rural mobility needs in the Peninsula: considering access to services, jobs and education using active travel and public transport and planning to ensure equality and inclusion.

This study will identify existing and likely future transport deficits accessing ports and airports.

### Key Priorities and Opportunities

Identify opportunities for productivity improvements  
Understand potential carbon reduction and other environmental benefits from changes to use profile on corridor  
Understand real cost of congestion/delays.

Assessment of scenarios for transitioning to low carbon future, in order to:  
Develop those which are realistic and achievable  
Ensure solutions are socially acceptable minimising inequalities.

Develop evidence base for technology and electric vehicles  
Identify quick wins by mode and sector  
Identify longer-term challenges and needs for deployment and implementation.

Development of a framework to understand the role of rail in addressing priorities for moving people and goods  
Define better integration with rail and the need for alternatives.

Understanding of consolidation opportunities for distribution off key strategic corridors  
Developing freight best practice in the region  
Improving standards of light goods/commercial vehicles operating in the region.

Make better use of existing vehicular assets  
Reduce the burden of ownership through shared access to mobility  
Capitalise on the rise of renewable energy across the region  
Use mobility changes as a lever for community cohesion.

Determining growth and diversification opportunities  
Detailing connections with markets and facilities outside of the Peninsula  
Understanding current constraints, impacting performance and future potential.







# NEXT STEPS

Our vision sets out our transport and mobility goals for the peninsula region. We want to influence and shape our future and are now developing a full transport strategy which will help to address our existing social, economic and environmental challenges, whilst preparing for those that are yet to come. We will continue to work closely with key organisations and stakeholders from within and beyond the region as part of this process.

The strategy will respond to the challenges identified here and build on the opportunities to define what will be delivered and when. If you would like to find out more, including about opportunities to engage in and contribute to the strategy, please visit our website <https://www.peninsulatransport.org.uk>.

## Residents

We will continue to work with residents to get their views to shape the development of the Strategy through consultation as well as through the delivery of the emerging proposals

## Business

We will work with business and Local Enterprise Partnerships to ensure the emerging Strategy supports their priorities and contributes to growth in the economy and job market

## Peninsula Transport (STB)

We will continue to work with partners and stakeholders to define transport and mobility priorities to transform the region over the next 30 years

## Government

We will work with Government to promote and outline the strategic priorities for the region – seeking opportunities to secure investment and 'level-up' opportunities

## Local Authorities

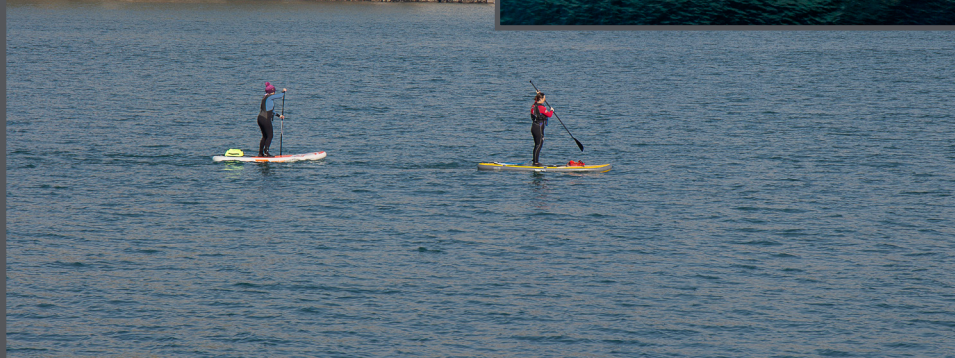
Our local authorities will work with partners to deliver programmes/schemes that meet the objectives of the Strategy

## Visitors

We will engage with and share our ambitions with those who visit the peninsula to ensure that they can help shape our priorities



# OUR DIVERSE PENINSULA



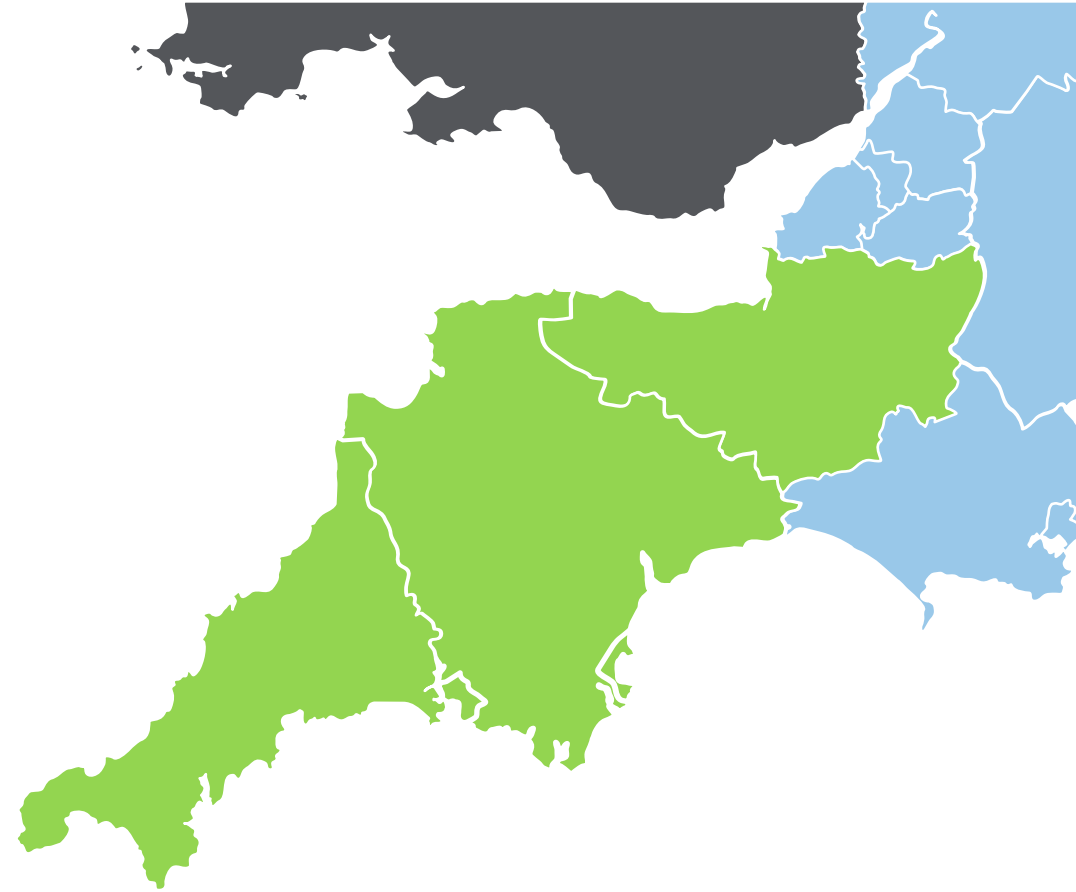
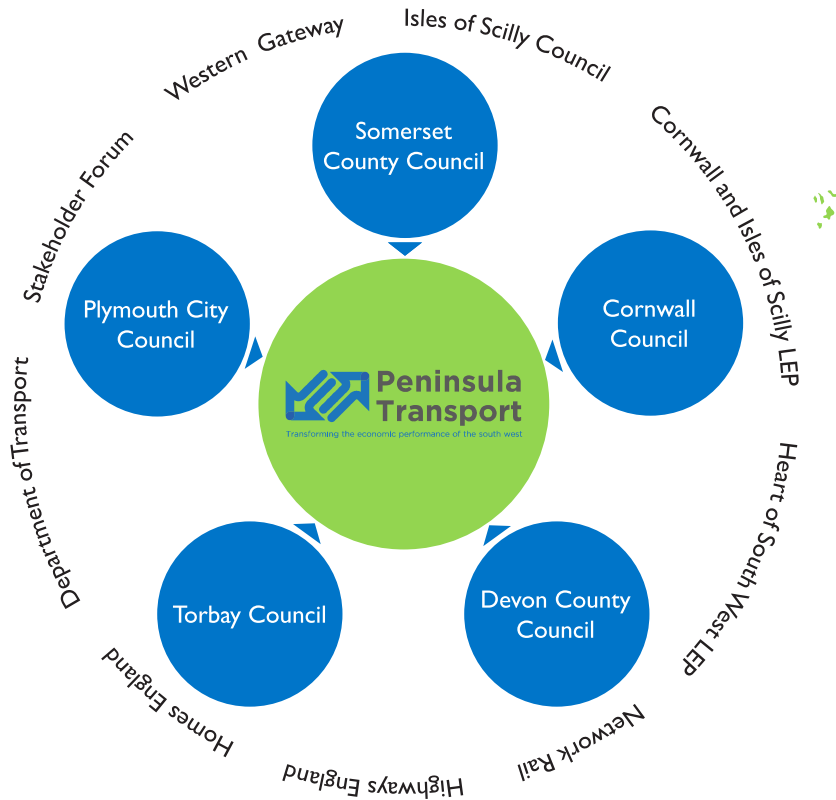




# FACT SHEET

## The Role of Peninsula Transport

Peninsula Transport is the Sub-National Transport Body (STB) for the South West Peninsula established to transform the economic potential of the South West. We represent five local authorities and two Local Enterprise Partnership areas and work closely with co-opted members and key stakeholders from the private and public sector. Along with our neighbouring STB, Western Gateway, we are responsible for defining and delivering the strategic transport priorities for most of South West England.

We've worked together as a region to secure investment of more than £300m through the Local Growth Deals, as well as developed plans for investment in all aspects of the transport network. Working together with Co-opted partners we are developing a Peninsula Transport Strategy that enables transport to play its vital role in delivering clean growth, connects people and is adaptable to the changes of the future.



-  Peninsula Transport Region
-  Western Gateway Region

# FACT SHEET

## Data Sources

### The Peninsula Region

#### The Economy is Diverse

<https://peninsularailtaskforce.files.wordpress.com/2016/11/prtf-closing-the-gap.pdf>

#### Network Resilience

2016 – PRTF Closing the Gap

Source: PRTF

<https://peninsularailtaskforce.files.wordpress.com/2016/11/prtf-closing-the-gap.pdf>

#### Maritime Industry

2019 – “Maritime Industry”

Source: Peninsula Regional Evidence Base

<https://www.peninsulatrtransport.org.uk/wp-content/uploads/2020/03/Peninsula-Transport-REBaddendum.pdf>

#### 2.3m Population

2019 – Mid-Year Population estimates (2,332,542)

Source: Office for National Statistics licensed under the Open Government Licence.

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorth-ernireland>

#### £44bn

2017 – Gross value added (GVA)

Source: Office for National Statistics

<https://www.ons.gov.uk/economy/grossvalueaddedgva/bulletins/regionalgrossvalueaddedbalanceduk/1998to2017>

#### Growth Sectors

Source: <https://heartofswlep.co.uk/wp-content/uploads/2020/02/HotSWV-Quarterly-Business-Bulletin-Autumn-2019-pdf.pdf>

#### Levelling Up

Average earnings £36k (SW) bottom 3 regions in country\* (£515 versus £585 a week)

Average house price (Sep 20)

£244k (UK) versus £275k (SW) - top 4

regions in the country\*\*

South West Ranked No. 1 for annual house price change (6.4%) for 2020

\* <https://www.michaelpage.co.uk/advice/career-advice/job-search-advice/average-uk-salary-region>

\*\* <https://propertydata.co.uk/charts/house-prices>

#### 45 years old

Older population

Source: Peninsula Regional Evidence Base

<https://www.peninsulatrtransport.org.uk/wp-content/uploads/2020/03/Peninsula-Transport-REBaddendum.pdf>

#### 31% over 65

Getting older

Source: Peninsula Regional Evidence Base

<https://www.peninsulatrtransport.org.uk/wp-content/uploads/2020/03/Peninsula-Transport-REBaddendum.pdf>

#### Growth Sectors

Peninsula Economic Connectivity Study – Growing sectors

<https://www.peninsulatrtransport.org.uk/wp-content/uploads/2020/07/Peninsula-Transport-ECS-Tech-Report-Final-Version-080720.pdf>

### Travel and Mobility

#### 1/2 of Peninsula Workers

Source: ONS: 2011 Census

Source: Economic Connectivity Study analysis (all scenarios)

#### Poor Digital Connectivity

Source: Economic Connectivity Study

Source: OFCOM Communications Market Report, August 2018 <https://www.ofcom.org.uk/about-ofcom/latest/features-and-news/decade-of-digital-dependency>

#### CO2 2018-2050

Source: Peninsula Economic Connectivity Study

<https://www.peninsulatrtransport.org.uk/wp-content/uploads/2020/07/Peninsula-Transport-ECS-Tech-Report-Final-Version-080720.pdf>

#### Only 3 Major Roads

Source: Peninsula Economic Connectivity Study

<https://www.peninsulatrtransport.org.uk/wp-content/uploads/2020/07/Peninsula-Transport-ECS-Tech-Report-Final-Version-080720.pdf>

#### Travel Recovery from COVID 19

Source: Peninsula Vision Analysis – ONS: 2011 Census

#### High Car Dependency

Source: ONS/DfT

#### 2nd Highest Car Ownership per household

1.39 cars for the Peninsula.

1.30 cars for England excluding London.

No.2 region for car ownership (only second to South East)



