SOUTH WEST RURAL

MOBILITY STRATEGY

March 2022

Peninsula Transport

Western Gateway
Sub-national Transport Body

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FOREWORD

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We recognise the current approach to rural mobility has not worked for many of our local communities in the South West. The challenges they face from the lack of access to everyday services, affordability and limited choice are very real. This inevitably results in an increased need for private car journeys. This is why we need the Rural Mobility Strategy and why we commissioned WSP to work with us to undertake this joint study covering the South West of England.

We are pleased with this Rural Mobility Strategy and believe that it is an excellent piece of collaborative working between the Western Gateway and Peninsula Transport STBs. The vision and approach to transform rural mobility, improve access to local services and decarbonise transport is greatly welcomed. It demonstrates how our shared perspective to the future of improved rural mobility is crucial for helping the economy as well as meeting decarbonisation goals.

We are grateful to WSP for working with us to identify the challenges faced by rural areas and those with the most urgent transport needs. We look forward to continuing our collaborative work in recommending pilot projects which, subject to funding and working with partners, will be trialled across our region.

Councillor Andrea Davis
Chair of Peninsula Sub-National Transport Body

Councillor Mike Greene
Chair of Western Gateway Sub-National Transport Body

EXECUTIVE SUMMARY

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INTRODUCTION

This strategy, developed jointly by the Peninsula Transport and Western Gateway Sub-national Transport Bodies (STBs), sets out mobility policy for the whole South West of England to support the levelling-up of our local rural communities and economies. It identifies an ambitious vision for the future of rural mobility and provides a set of policies and proposals to achieve it.

Our definition of rural encompasses all places outside of major urban centres that are in the countryside or coastal areas, including on estuaries. In developing this strategy, we have taken an evidence-led, people and place-centric approach, ensuring that the needs of different rural communities are taken into account.

Outside London, rural areas face some of the highest house prices (based on a multiple of earnings).

OUR RURAL PLACES

Together, the two STBs cover the whole of the South West of England amounting to nearly 20,000km² of land outside of the major urban centres. Analysis of our rural places has revealed that not only do they have diverse geographies but their communities and economies are equally diverse. Some of our rural communities are very affluent, more so in the Western Gateway than in the Peninsula, but others suffer from significant economic challenges. Furthermore, even where there is significant wealth, there can be pockets of deprivation.

The challenges faced by our rural areas are varied and complex and we need to consider travel by people and freight, for consumers and organisations. Poor access to publicly-available and shared transport and long journey distances mean that rural areas are far more reliant on private cars than their urban counterparts. This leads to transport deserts and social isolation for those without cars, alongside higher levels of expenditure on transport.

Rural areas, particularly rural villages, have higher transport costs as a percentage of disposable income than urban areas.

THE CASE FOR INVESTMENT IN RURAL MOBILITY

The case for investment in mobility for our rural places is clear and unequivocal. They are at the forefront of the climate change challenge and the need to meet Net Zero targets. Without support for mobility, we cannot reduce carbon emissions from rural transport, we cannot provide alternatives to the dominance of private cars in our countryside, and we cannot give communities the opportunity reduce travel, including through digital communications. We also need investment to mitigate the impacts of climate change, including making our rural transport infrastructure resilient to its effects.

Our future rural economy also needs support from transport investment to deliver growth and diversification. The tourism sector in the South West is vital to the industry as a whole across England, but this presents challenges and we need to find new ways to move our visitors around the region. Our agricultural industry is changing and the increasing need for food security and productivity means more transport of produce. Our growing environment economy needs transport to support the movement of resources and employees.

Those living in the most rural areas made 87% of their journeys by car, compared with 67% of those living in the most urban areas.

However, alongside future challenges are those faced now by rural communities across the South West. Our rural residents have higher transport costs than their urban friends and they experience greater fuel poverty, which is now compounded by rising fuel and energy bills. We also have an ageing population who rely more greatly on publicly-available transport but our bus networks have drastically declined over the last decade as a result of reduced local authority

budgets. Our young people, who generally attain lower qualifications in rural areas, are forced to drive to access education and employment, while also struggling to find higher paid opportunities and affordable housing in the areas in which they have grown up.

> Rural settlements in the South West are home to 1.8 million residents, equating to 33% of the population.

Our rural economies pay our employees less, have less investment, and are less productive. They also face shortages of the right skills, particularly in the agriculture and tourism sectors, due to poor transport connections, low housing affordability, an ageing population, and the impact of Brexit. Our residents have to travel for longer to access employment, and for daily needs such as goods, education, and healthcare. As services have continued to decline in our rural areas, the ability of people to live locally and to access their needs within easy reach has become much more rare.

Many of our rural areas are affluent, some very much so, but other communities face significant deprivation. Even where there are higher levels of affluence, there can be hidden pockets of much lower affluence, and there are some areas that are almost entirely made up of less affluent and deprived communities.

Of our total population in the South West, one third live within the rural area, amounting to 1.8m people. Without investment in rural mobility, a substantial proportion of the South West, the population and the economies they support, will continue to be hindered by poor accessibility and connectivity, holding back not only the rural areas but the region as a whole.

> Some 29% of rural residents in the South West live in small hamlets or in the open countryside.

OUR VISION

Using future rural scenarios we have formulated, the wider policy context, and our understanding of key challenges we have developed a vision for rural mobility:

> *"By 2040, rural mobility will have transformed physical and digital connectivity and accessibility, levelling-up our countryside and coastal communities.*
>
> *Our targets for Net Zero will be being met through reducing the need to travel through improved digital and local services, better active, publicly-available and shared travel, and the decarbonisation of transport. Our communities and economies will be stronger with better connectivity between rural places as well as with our major urban centres.*
>
> *Communities will be working with public and private sectors to deliver* **operationally and financially sustainable** *commercial models which provide practical, and affordable mobility.*
>
> *This transformation will be leading towards a basic universal level of accessibility for our countryside and coastal residents and visitors."*

OUR STRATEGY

To support this vision and associated policy objectives we have developed a framework for the delivery of future mobility that can be "flexed" to meet the specifics of each place. We believe the future of rural mobility should be built around the framework presented in Figure 1 (without applying specific priorities to each element).

Figure 1: Framework for The Delivery of Future Mobility

Rural mobility should be underpinned by **strong digital connectivity** supporting e-commerce and online services, enabling more to be done without the need to travel, if people do not wish to.

Settlements to support **more local services** where people need them to strengthen communities and economies and reduce the number and length of journeys.

Integration of activity and mobility, including rural hubs, should be central to our future rural mobility system bringing together better interchange with local community and commercial activity

Adapting the 15-minute city concept, networks of settlements should work together, sharing facilities, services and resources to form **30-minute rural communities**, supported by improved intra-rural connectivity.

Decarbonised, active, publicly-available and shared transport should be central to improving rural mobility, increasing choice and affordability and providing alternatives to single occupancy private car journeys.

Realistically, car and vans will remain vital to many journeys in rural areas but the **sharing and electrification of cars and vans** need to be priorities to support those without access to them and meet net zero targets

Strengthening larger rural settlements should provide stronger drivers of socially, environmentally and economically sustainable rural development through greater investment.

When needs cannot be met locally within rural areas, there should **be better strategic connections** to larger urban centres by inter-urban bus, coach and rail. These should be connected to local areas by active and shared modes.

Operationally and financially sustainable delivery should be supported through **cross-sectoral partnership and funding** across the public, private and community sectors.
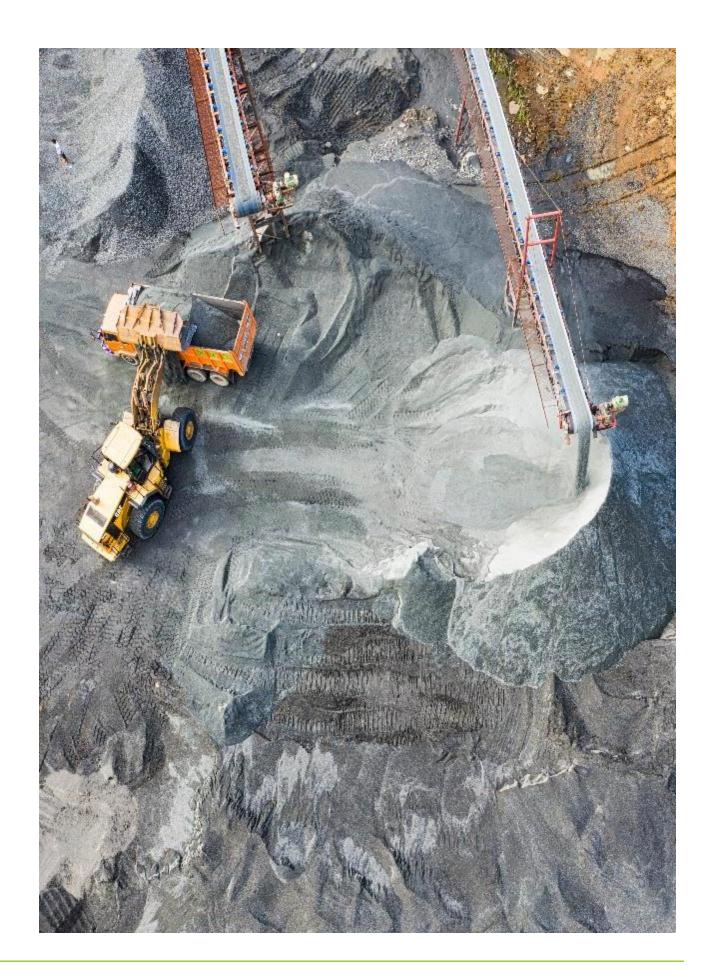
Increasing resilience of mobility networks including generation and security of energy.

Across the South West, there is a greater proportion of residents aged 66+ in rural areas (32%) compared to urban areas (26%).

Figure 2 is a schematic representation of this framework which demonstrates the overall approach. It demonstrates networks of rural communities working together to provide a range of local services and facilities. This is supported by strong digital connectivity and provision of mobile services travelling between communities. Rural hubs are central to both the provision of local services and connectivity to the wider rural areas and beyond. They provide access to shared modes and are the stops for inter-urban transport including bus, coach and rail. Within the rural communities, decarbonised, active, publicly-available and shared modes (including e-bikes, e-scooters, Dynamic Demand Responsive Transport and car club vehicles) are used to move around locally but also connect to inter-urban transport at the hubs. Each settlement also has facilities for charging electric vehicles, either at charging hubs or through peer-to-peer projects, and car and van-sharing increases the utilisation of vehicles while also providing alternatives where publicly-available transport does not support a particular journey.

The shortage of labour and skills is a significant challenge facing rural businesses across the South West.

Figure 2: Schematic Representation of Framework

Legend:
- Village
- Planned Garden Village
- Town
- City
- Mobility Hub
- Rail station
- 30 minute rural communities
- School
- Local Shop
- Market
- Village pub
- Supermarket
- University
- Hospital
- Doctor's surgery
- Shared e-bikes
- DDRT
- Inter-urban bus
- Car club car

RURAL MOBILITY BUNDLES

Fundamental to this strategy is taking a holistic approach to delivering improvements. Implementing individual interventions may generate some benefits but a whole system approach, with individual new interventions working together with the existing mobility network may be more likely to support a more integrated and, consequently, better functioning rural mobility system.

This strategy, therefore, presents a set of bundles of rural mobility interventions, including modes, services, and supporting infrastructure. These bundles are focused on different types of rural place which can be used to develop comprehensive plans for improving mobility within specific local areas.

These bundles will form the basis for the development of rural mobility pilots. As the bundles are focused on the pilots, those interventions that are more deliverable within shorter periods of time have been prioritised, these primarily being service-related interventions.

Through delivering bundles of interventions it would be expected that they would integrate modes, services and infrastructure both physically and operationally to support interchange and delivery. Therefore, some infrastructure interventions have been prioritised where they provide integration and wider community/economic functions, most notably rural hubs and related interventions.

> Average download speeds are substantially lower in rural areas (25 Mbps) compared to urban areas (36Mbps) across the South West.

In addition to those interventions prioritised for the pilot bundles, over 30 others were identified as potential rural mobility interventions which could have a significant role to play in the future of our countryside and coastal places. Depending on the specific locations, these could also be included in the pilots, but are of lower priority based on meeting general needs and deliverability

within the context of short-term pilot programmes. These further interventions include:

§   Active travel infrastructure
§   Road safety improvements
§   Tourism-related support
§   Low level air freight

RURAL MOBILITY POLICY

While this strategy sets out a broad policy framework for the rural South West, there are specific policy interventions which could be considered in delivering our rural mobility vision.

§   30-minute rural communities
§   Rural proofing of local authority mobility policy
§   Investment in our market towns as centres of rural services and employment growth
§   Making rural development socially, environmentally and economically sustainable
§   Minimum standard of community services
§   Supporting rural neighbourhood plan-making and delivery
§   Working towards a policy providing universal basic accessibility

SUPPORTING INTERVENTIONS

In addition to the policy interventions and the bundles there is a set of other options that could support the achievement of the vision and objectives, including:

§   Behaviour change
§   Better use of railways including line and station reopening
§   Electrification of publicly-available and shared modes
§   Freight on passenger transport

§   Automated and autonomous modes

MOBILITY'S DEPENDENCIES

To support wider improvements, the dependencies of rural mobility also need further development in rural areas in terms of energy and digital connectivity.

§   Electricity generation and distribution

§   Digital communications enhancements

ENGAGING WITH RURAL COMMUNITIES AND ECONOMIES

A high level communications plan has been developed as part of a suite of supporting technical documents but there is a range of other engagement and partnership activities that could be undertaken, including:

§   Cross-boundary partnerships

§   Cross-sectoral public sector working

§   Rural mobility champions in local authorities and rural communities

§   Community capability and capacity enhancement

§   Best practice guidance

There are fewer bus stops and fewer bus services per hour in rural areas compared to urban areas across the South West.

RURAL PILOTS

A set of (primarily) mobility service and infrastructure interventions have been formed into bundles specific to different types of rural places (rural towns, villages, hamlets and isolated dwellings). The bundles have been developed through an assessment of user needs, how different interventions support those needs and how deliverable interventions are in those places.

The overall concept for the pilots focuses on delivering trials of bundled projects in different types of rural place, within either individual or groups of settlements, led by different sectors, and either within or across rural local authority boundaries. By operating a varied set of pilots, we believe that there are more

opportunities to learn and to develop operationally and financially sustainable models for long term delivery of mobility in rural areas.

Of the potential pilots, six have been selected by the strategy leadership team for further consideration. High level business cases have been developed and are presented in the accompanying technical documentation. The six were chosen on the basis that together they provide a broad range of different structures within which to pilot rural mobility interventions. They test a range of leadership types and, importantly, test how well local authority areas can work individually or together to deliver rural mobility. The pilots also range in scale, from a small community-led pilot in a single settlement to a much wider pilot covering both rural and urban local authorities.

The shortlisted pilots include:

§   Community-led pilot for a single settlement

§   Local authority-led pilot for a network of settlements within a single local authority boundary

§   Community sector-led pilot for a network of settlements within a single local authority boundary

§   Private sector-led pilot for a network of settlements within a single local authority boundary

§   Local authority-led pilot for a network of settlements across the boundaries of two rural authorities

§   Local authority-led pilot for a network of settlements across the boundaries of two authorities, one rural and one urban

Road transport energy consumption (in tonnes of oil equivalent) per thousand individuals is greater in the South West (639) than the UK average (587), and substantially greater in rural areas (766).

Each pilot will develop its own unique set of proposals, based on the bundles identified by the strategy but also, vitally, taking into account the existing

services, infrastructure and partnerships currently operating in their respective areas.

However, a typical bundle of interventions for a pilot could be as follows, using community-led pilot within a small rural town and surrounding area as an example:

§ A community volunteer bus, car or taxi service and delivery service

§ A network of rural hubs

§ An EV changing hub and peer-to-peer EV charging

§ Mobile service delivery (e.g. banking, retail, food, etc)

§ E-bike, e-cargo bike and e-scooter sharing and wheels-to-work

§ Car club

§ Local freight consolidation and parcel lockers

§ Ride-sharing including for vulnerable groups

This bundle could be supported by existing inter-urban bus, coach and rail services for strategic movements, with connections locally by the modes set out above.

PARTNERSHIPS

The delivery of this strategy and the pilot studies will be reliant on not only Peninsula Transport and Western Gateway but a significant range of public, private and community sector organisations. The STBs cannot deliver this strategy alone; it is a strategy for the whole of the South West, both in terms of geography and the organisations with responsibilities for and stakes in the delivery of mobility in rural areas.

NEXT STEPS

The key next steps in delivering this strategy are focused on developing the pilots into live trials of rural mobility in the South West. Following the publication of this strategy, Peninsula Transport and Western Gateway will work to secure

funding to support the development and delivery of the pilots. Once funding has been secured, we will put in place the following steps to develop the pilots:
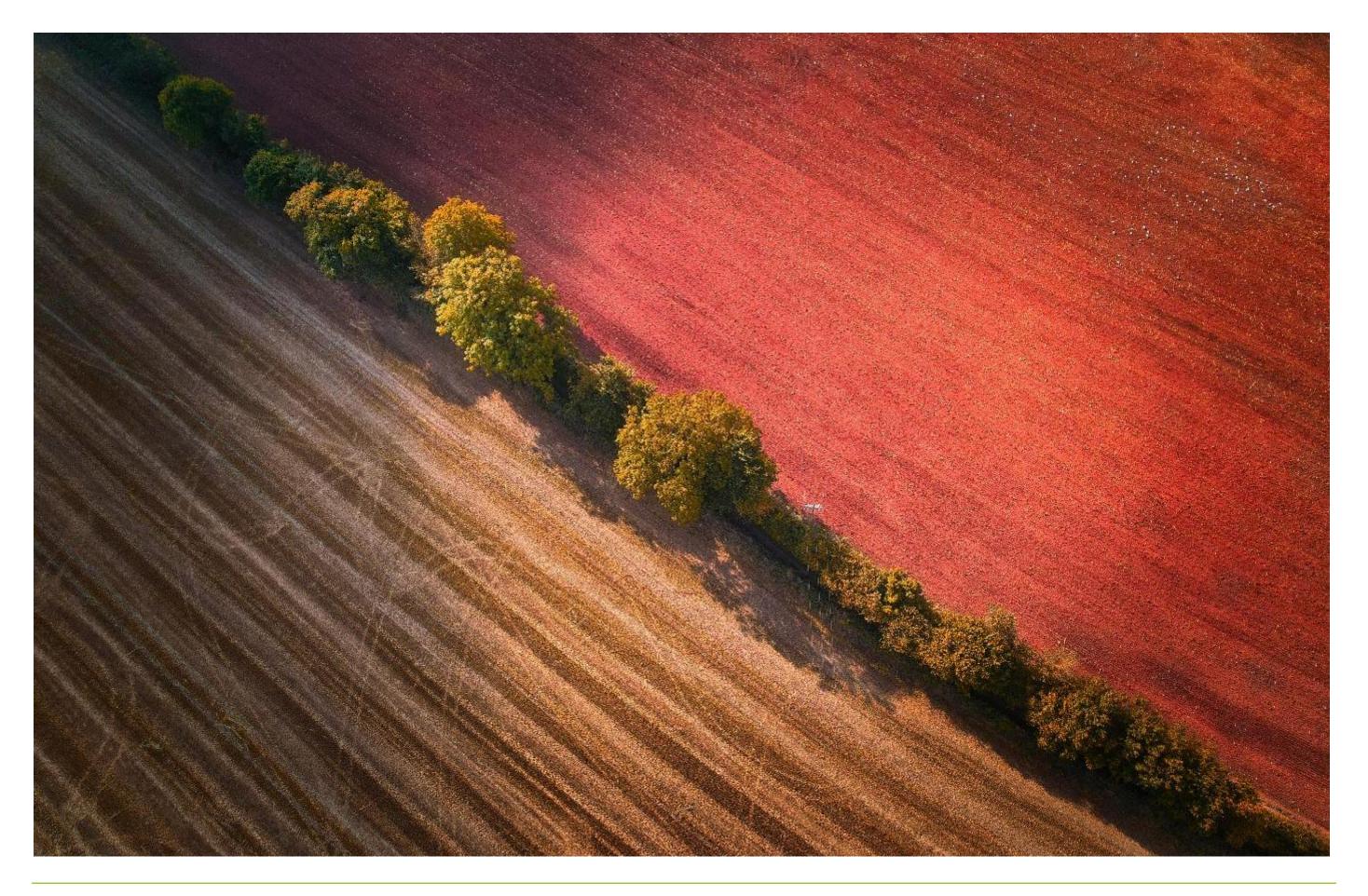
§ We will work with key major stakeholders across the region to secure their support and seed funding for the pilots, both generally across the South West and within the areas where we consider pilots should be delivered.

§ Identify and agree actual places to act as the pilots.

§ Develop a prospectus for the pilots setting out our proposed approach and the priority areas in which the pilots should be undertaken.

§ Launch a competition for initial proposals for potential pilots.

§ From the Expressions of Interest, we will select a shortlist of projects to receive initial exploratory STB funding and specialist rural mobility consultancy support to develop the outline business cases for their pilots.

§ On receipt of all those submissions, the STBs will make a final selection of pilots to receive funding from the STBs.

SUMMARY

The current approach to rural mobility has not worked for many local communities and economies in the South West. They suffer from disconnection, lack of access to everyday services, poor affordability and restrictions in choice. In facing the climate emergency, rural areas are also, comparatively, higher generators of harmful emissions.

This strategy has set out a range of proposals intended help to turn around rural mobility and build new approaches to support our countryside and coastal communities to become more connected, more accessible and more prosperous.

We believe piloting some new approaches will be a first major step in delivering more for our rural areas. Peninsula Transport and Western Gateway cannot deliver these pilots alone and we look to work with our partners, stakeholders and communities to set those pilots on their way.

1

INTRODUCTION

1 INTRODUCTION

This document presents the rural mobility strategy for the South West of England and has been jointly produced by the two Sub-National Transport Bodies for the area, Peninsula Transport and Western Gateway.

PENINSULA TRANSPORT AND WESTERN GATEWAY

Sub-national transport bodies (STBs) were devolved following an amendment in the Local Transport Act 2008 by the Cities and Local Government Devolution Act 2016 and allow for larger strategic transport governance of transport across England. Maps of the local authority areas and the urban/rural split are provided at the end of this section.

PENINSULA TRANSPORT

Peninsula Transport was established as a STB in 2018 by the constituent authorities of Cornwall, Devon, Plymouth, Torbay and Somerset and covers the southwest peninsula of the UK. Peninsula Transport addresses the transport and infrastructure needs of the southwest region to boost economic growth. It also works directly with other departments and authorities who are co-opted members of Peninsula Transport, including Department for Transport, Cornwall and Isles of Scilly Local Enterprise Partnership, Network Rail, Homes England, Heart of the South West Local Enterprise Partnership and National Highways.

WESTERN GATEWAY

Western Gateway is comprised of eight local authorities and one combined authority with the aim of working together to provide leadership on strategic transport matters in the region with a unified voice. The authorities that form Western Gateway are; Bristol City Council, Dorset Council, Bath and North East Somerset Council, Bournemouth, Christchurch and Poole Council, Gloucestershire Council, North Somerset Council, South Gloucestershire Council, Wiltshire Council and West of England Combined Authority. The aim of Western

Gateway is to enable clean growth and increased use of active, publicly-available and shared transport through a long-term investment programme that will provide a cleaner, more reliable, well-connected and resilient transport system.

OUR RURAL MOBILITY STRATEGY

This strategy sets out the strategic mobility policy for the whole South West of England to support the levelling-up of our local rural communities and economies. It identifies an ambitious vision for the future of rural mobility and a set of policies and proposals to achieve that vision.

Figure 3: Strategy Study Area

Our definition of rural encompasses all places outside of major urban centres that are in the countryside or coastal, including estuarial. This therefore includes market towns, villages, hamlets and isolated buildings, and surrounding countryside that are inland or close to the coast. We have also considered the differences between rural locations that are 'near urban' or remote.
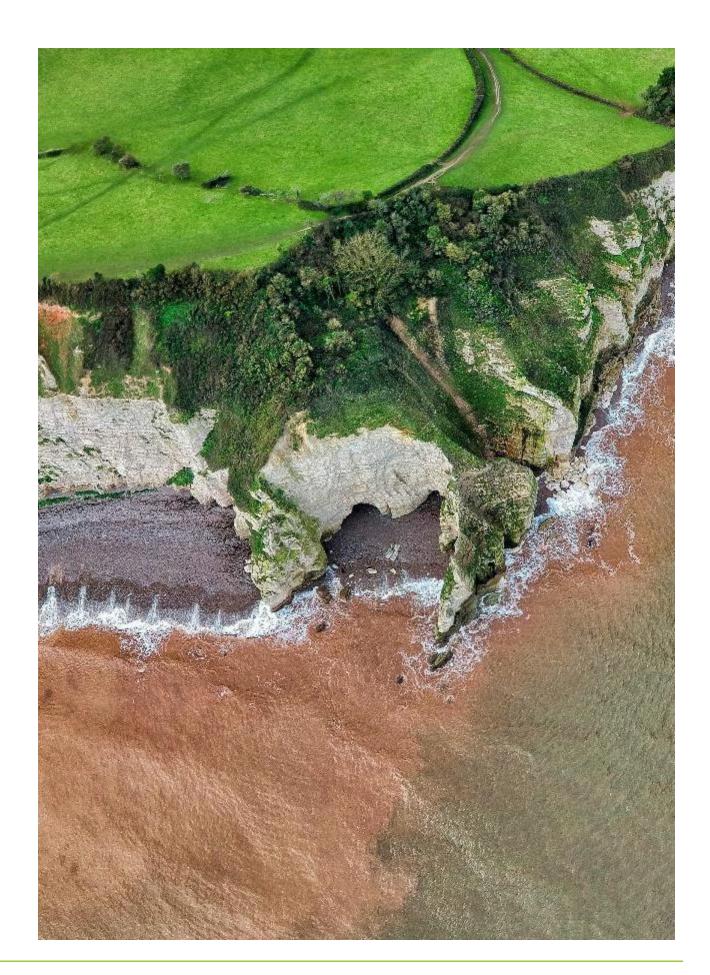
Our definition of mobility goes beyond simply transport. 'Mobility' means the physical and digital movement of information, people or freight (raw materials, crops, components, products and consumables) by any available system, service or mode. Mobility therefore includes walking, traditional transport such as cycling, buses and cars, freight and agricultural vehicles, e-commerce, home working and digital communication.

In developing this strategy, we have taken an evidence-led people and place-centric approach, ensuring that the needs of different rural communities are taken into account. We have undertaken detailed analysis of the key challenges faced by rural communities and the role mobility plays in them. We have also considered the major changes currently affecting rural places and which will continue to do so over the coming years. These changes have been used to identify a range of alternative future scenarios for our countryside and coastal areas, which have helped us to shape the vision for rural mobility. The strategy goes on to present a set of comprehensive proposals to improve mobility in rural areas. These are supported by further proposals for a number of pilots to test new approaches to securing the long term operationally and financially sustainable delivery of mobility in our rural areas.

This strategy has been developed by the STBs for the whole of the South West and not simply for Peninsula Transport and Western Gateway themselves. It is therefore for the STBs with partners, stakeholders and communities to frame the delivery of this strategy and take individual roles in achieving the strategy's aims.

This main strategy document is supported by more detailed comprehensive technical documents summarising the analysis undertaken, which can be obtained by request using the contact details on the back cover of this report.

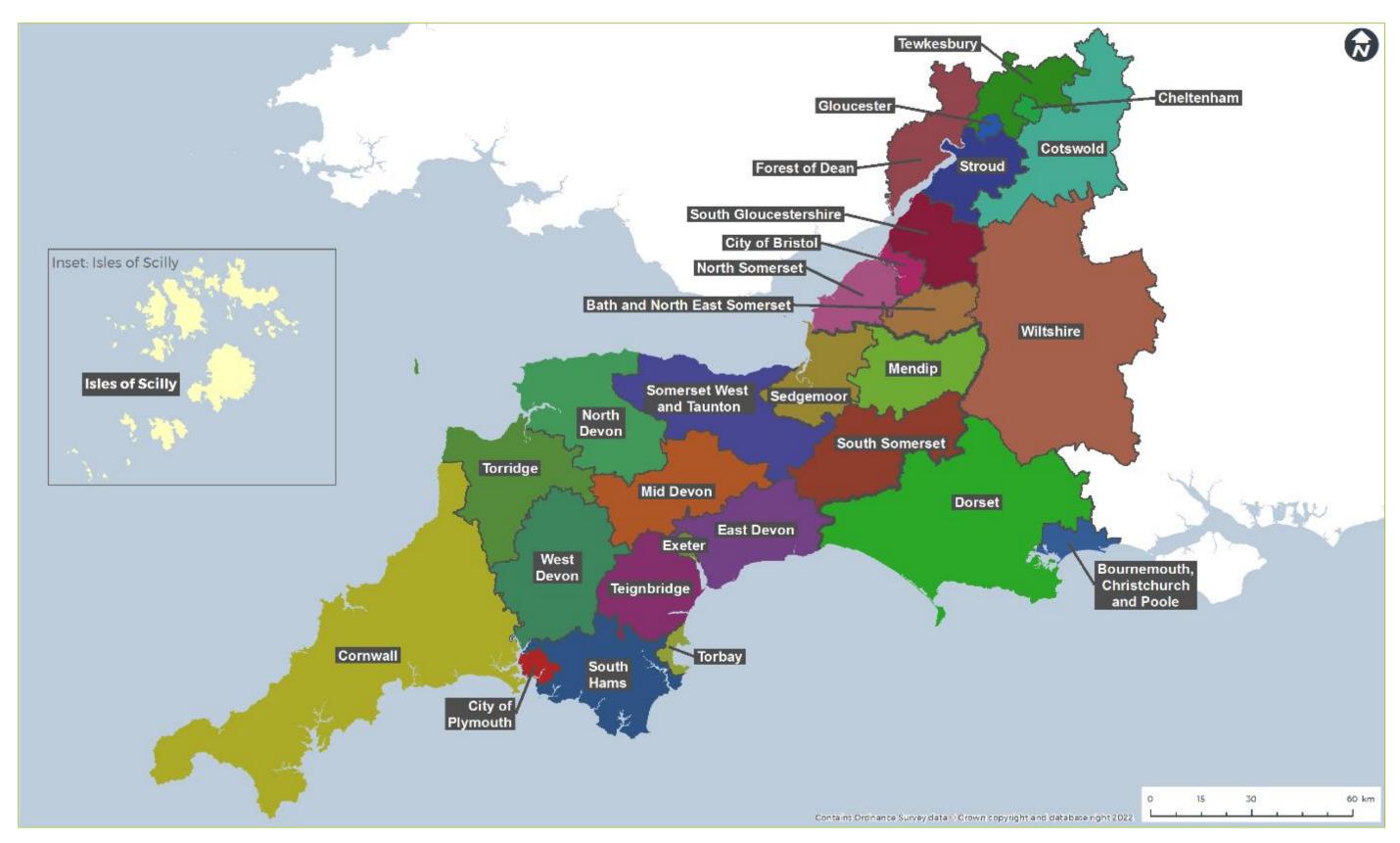The glossary on page 68 provides an explanation of terms used within this report.

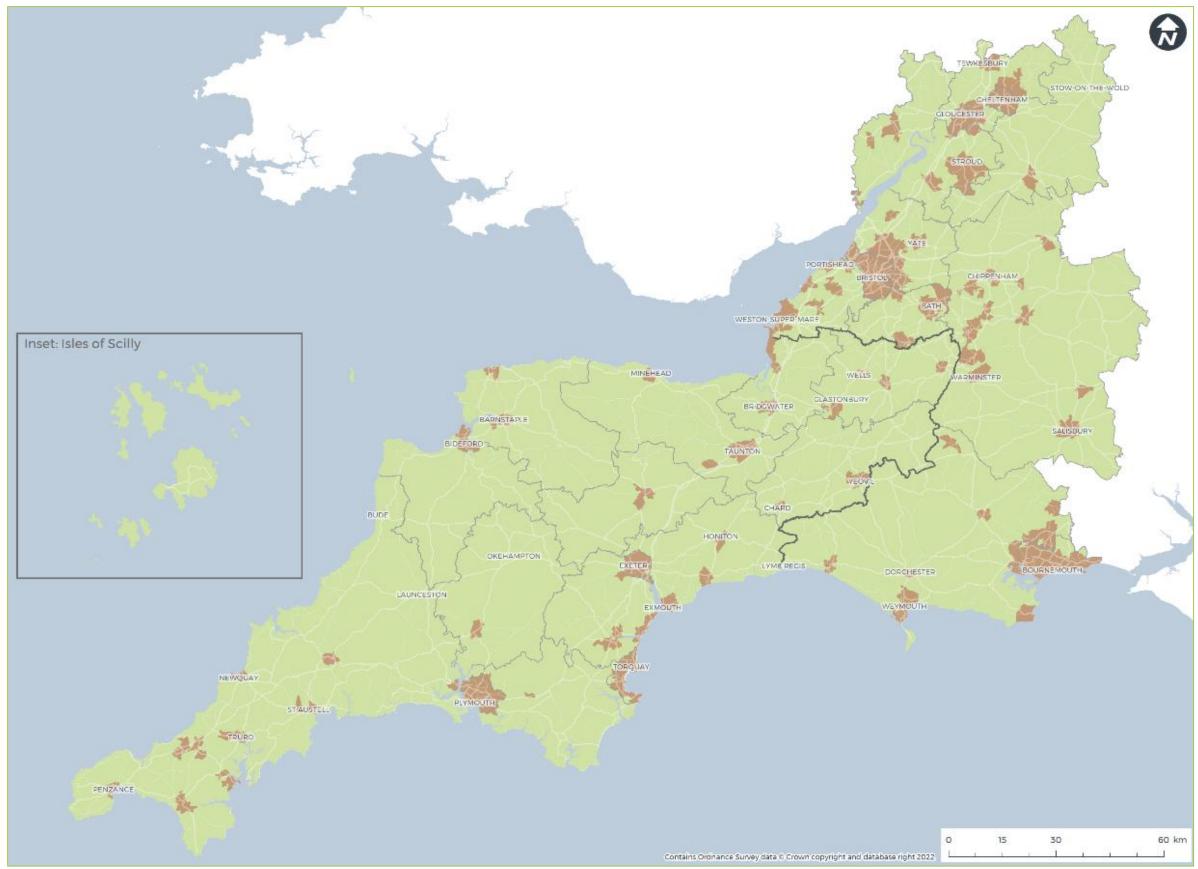Figure 4: South West Local Authorities

Figure 5: Rural Urban Classifications in South West

2

OUR DIVERSE
RURAL COMMUNITIES

2   OUR DIVERSE RURAL COMMUNITIES

This section provides a background to the countryside and coastal areas of the South West and the diversity of its people and places that are supported by our rural mobility network.

OUR RURAL PLACES

Analysis of the rural areas across the South West of England has revealed the true depth of diversity in our countryside and coastal places. There is not one type of rural but a myriad of places, all with different characteristics, challenges and needs.

Together the two STBs cover the whole of the South West of England, amounting to nearly 20,000km^2 of land outside of the major urban centres. The South West has the most rural population of England's traditional regions with 32% of its population. Only the East of England has a similar percentage of rural residents, at 30%, followed by the East Midlands at 27%. The South West also has the highest proportion of its population living in villages or smaller settlements and, at 19%, the figure is almost double the average across England's regions.

This area has a diverse landscape, ranging from the green edge of Bristol and the West of England conurbation to the remoteness of Land's End and beyond to the Isles of Scilly. The landscape varies from lowland to upland, from the flood plains of the Somerset Levels to the high tors of Exmoor and Dartmoor. In addition to two national parks, the South West is home to a large number of Areas of Outstanding Natural Beauty including some of the most well-known such as the Cotswolds, Mendips, Quantocks, and Tamar Valley.

However, the two STB areas vary significantly. The Peninsula has a vast area of indented coastline, much greater than the length of its land border with the Western Gateway, and some of the most remote countryside in England. This leads to its relative isolation from the rest of the country while the Western

Gateway is better connected to the South East, Midlands and Wales via motorways and railways.

This diversity is reflected in the settlements throughout the rural South West. There are 270 rural towns in the South West, 170 of which are in the Peninsula Transport area. Of these, 56 are coastal and 23 of which we have classified as remote. There are a further 554 villages and larger hamlets, 53% of which are in the Peninsula Transport area and 81 of these are coastal and 58 are remote.

> ### CASE STUDY: COVID TEST DRONE DELIVERY (CORNWALL AND ISLES OF SCILLY)
>
> In May 2021, Royal Mail began a month-long trial using an autonomous drone to deliver parcels from the UK mainland to the Scilly Isles at St Marys. A smaller drone, able to take off and land vertically, was then used to fly parcels between the islands to their final recipients.
>
> The trial focussed on PPE and Covid-19 test kits from the mainland but the drones also carried other parcels, including online orders from retailers when possible. The success of the trial may encourage Royal Mail to consider introducing the technology across the postal network to help support deliveries to more remote parts of the country. The trial was funded by central government and involved a consortium of the University of Southampton and several drone operators.

We have identified 23 types of rural place in the South West. When considering relative levels of affluence of those places, a total of 40 different place types have been identified. We have identified inland rural towns, villages and larger hamlets, the equivalent places on coasts, estuaries and islands, and have also

identified those that are remote in nature, being further from major urban centres. These account for over 800 of the nearly 1,000 settlements in the South West.

Additionally, we have identified locations that are outside of significant settlements, namely smaller hamlets and individual buildings. There is also diversity within these locations, ranging from those immediately next to urban areas, which benefit from greater connectivity and accessibility to services in those major towns and cities, to those in the most remote spots which are very much less connected and suffer from significantly lower levels of accessibility.

This variation in rural places and populations means that mobility solutions need to be planned for these differences in scale and locations. What might work in a rural town close to one of our major urban centres might not work in a small remote coastal hamlet, many miles from the nearest rural town which, in turn, is many more miles from an urban area. This complexity and diversity of place is only partly seen in our urban areas and they lack some of the combinations of challenges that many of our rural places face, including those that face the multiple challenges of being rural, remote and coastal.

OUR PRIORITY PLACES

Analysis of our rural places has revealed that not only do they have diverse geographies but their communities and economies are equally diverse. Evidence has shown that our larger rural hamlets, for example, are generally some of the more affluent places in the region. On the other hand, levels of affluence across our rural towns vary significantly, with some high performing towns alongside some that significantly struggle.

Poverty, deprivation and ill health are more difficult to identify in rural areas because the statistics are often not sufficiently detailed to pinpoint pockets of deprivation that exist amongst wider rural affluence. Even in the most affluent areas, there are pockets of low affluence, while there are some locations which are almost entirely populated by less affluent communities. We are therefore mindful that, while our categorisation of places is according to general levels of affluence in those areas, we must not forget that this provides an average picture of each place and this can hide those who struggle.

The focus of this strategy is to support levelling-up where there is an identified need and our analysis has investigated those rural places in most need of support. We have assessed the comparative levels of affluence across the South West and the levels of connectivity to a range of basic, everyday services that each of our rural communities has. This has enabled us to identify those settlements most in need of support, both in terms of the affluence of communities and their connectivity to services, which will provide a starting point for further work to follow the publication of this strategy.

OUR RURAL COMMUNITIES

Almost 1.8m people in the South West live within the rural area, 54% of which are within the Peninsula Transport boundaries. In total, rural residents account for one third of the South West population, but the proportion varies significantly between the two STB areas with 42% of the population in the Peninsula Transport area being rural compared to 26% for Western Gateway. Nearly two thirds of the rural population living in the South West, either live in a rural town or in small hamlets and isolated dwellings. Some 11% of the South West rural population live in coastal or estuarial locations, 17% in the Peninsula Transport area and only 3% in the Western Gateway. Populations in remote locations account for 7% of the Peninsula Transport rural population but none of the Western Gateway population.

PLACE CASE STUDY

- § Name: Wimborne Minster (Ward)

- § Unitary Authority: Dorset

- § Place type: Area of small hamlets and isolated dwellings near a village

- § Population: 126

- § Population density: 108 per km^2

- § Average household income: £52,109

- § Proportion in full-time employment: 44%

- § Top 5 industries: Wholesale, retail and trade; human health and social work activities; education; manufacturing; construction

- § Proportion without qualifications: 21%

- § Average property value: £236,563

- § Average journey time by public transport

  - · To food stores: 7 minutes

  - · To secondary schools: 16 minutes

  - · To large employment sites: 17 minutes

- § Average download speed: 38 Mbps

CASE STUDY: HOOK NORTON LOW CARBON (WIDER UK)

Hook Norton Low Carbon is a member-run social enterprise aiming to improve energy efficiency and reduce the carbon footprint of the Hook Norton village community in Oxfordshire. Since forming in 2010, the cooperative has implemented a wide range of interventions such as community housing, community energy, and several specifically targeted at mobility.

Hooky Car Club is a low emission car club with a current fleet of five vehicles ranging from hatchbacks to 4x4s. The cars are available to members 24-hours a day, 7 days a week. Hooky e-Bikes is an e-bike hire scheme to members. The bikes are stored in central location and are available (with helmets and panniers etc.) as required.

The Hub is low carbon co-working space paid for by users on a subscription basis.

Photo credit: Hook Norton Low Carbon

Table 1: Rural Place Types and Population for the South West

Place Type	Peninsula Transport		Western Gateway		Total			
	Settlements	Pop '000s	Settlements	Pop '000s	Settlements	Pop '000s	% Rural Pop	% Total Pop
Rural town	110	310	91	285	201	595	33.1%	11.0%
Small hamlets and isolated dwellings	-	254	-	268		522	29.0%	9.6%
Rural village	154	112	228	151	382	264	14.6%	4.9%
Coastal town	36	111	9	21	45	133	7.4%	2.4%
Rural hamlets	29	11	21	92	50	103	5.7%	1.9%
Remote small hamlets and isolated dwellings	-	58	-	-	-	58	3.2%	1.1%
Remote rural town	13	40	0	0	13	40	2.2%	0.7%
Coastal village	49	29	10	7	59	36	2.0%	0.7%
Remote coastal town	11	21	0	0	11	21	1.2%	0.4%
Remote rural village	29	16	0	0	29	16	0.9%	0.3%
Remote coastal village	14	8	0	0	14	8	0.4%	0.1%
Remote rural hamlet	12	2	0	0	12	2	0.1%	0.0%
Island Village	1	1	0	0	1	1	0.1%	0.0%
Coastal hamlet	4	1	0	0	4	1	0.0%	0.0%
Remote coastal hamlets	3	0.4	0	0	3	0.4	0.0%	0.0%
Rural total	465	974	359	825	824	1,799	100.0%	33.2%
Combined rural and urban total	538	2,296	454	3,116	992	5,412	-	-

PERSONAS

The diversity of our rural places and communities goes beyond location and scale. Our people are diverse too and the challenges they face are different and are often exacerbated by living and working in rural areas.

CASE STUDY: CO CHARGER (UK-WIDE INCLUDING THE SOUTH WEST)

Affiliated with Co Car and Co Bikes, Co Charger is a community charging app enabling motorists with EV chargers to share them with other drivers, so they can swap to an electric vehicle sooner.

The Co Charger app matches those with chargers and those wanting to charge, handling communication, booking and payments, making the process quick, simple, and hassle-free.

There are approximately 400,000 home chargers across the UK – far more than the 30,000 public chargers currently available. By helping motorists share their chargers, Co Charger enables the 40-50% of motorists who are unable install a charger at home to swap to an electric car.

The app operates across the UK including across the South West.

As part of the process to develop this strategy, we have undertaken a wide-ranging analysis of the populations in rural areas through both demographic and consumer analysis. We have also spoken to people who live and work in rural areas to understand the challenges they face. This analysis has enabled us to develop a number of realistic personas s to demonstrate the current challenges experienced by people living in the rural South West and how our strategy will help them.
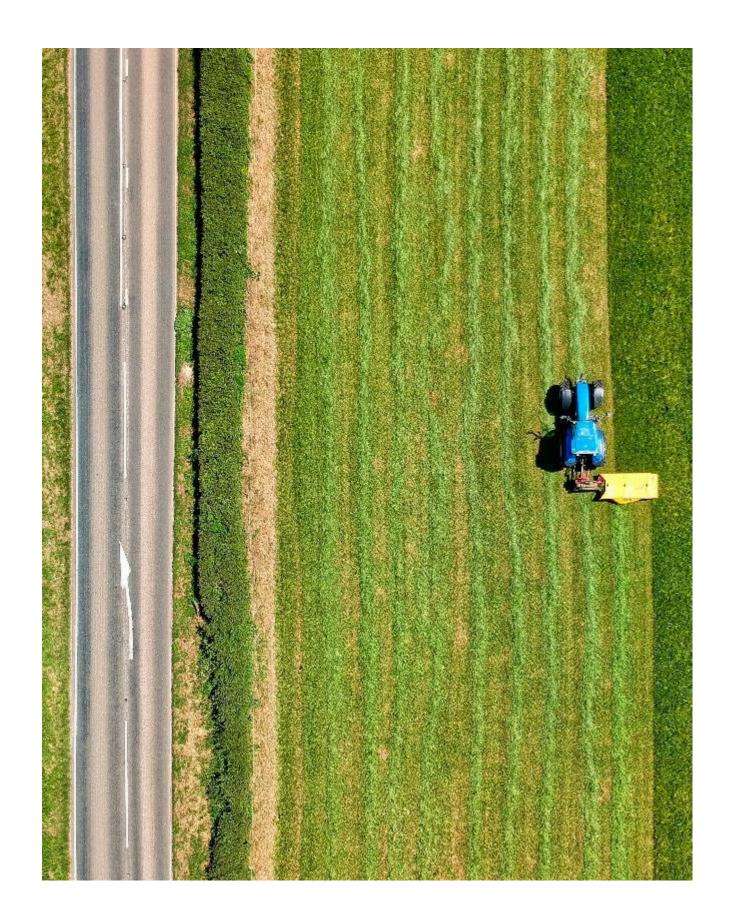
Figure 6: Personas

COMFORTABLE CATRYN

Catryn lives in a small hamlet near a larger village with her family. Catryn needs to drive her son to college in the nearest big town, as there is no alternative, before driving to work at a business park outside the town. While this is convenient, it is not ideal as it takes time out of Catryn's day. Her husband works from home as often as possible but is hampered by slow internet speeds. The family do shop online, but often face delivery delays as their house is hard to find.

RELAXED RON

Retired Ron lives in a market town with his wife. They enjoy travelling but have noticed that the cost of public transport has increased and the choice destinations are fewer, which forces them to drive (which is becoming harder as they age). The town has most of the things they need, so they don't need to shop on the internet, but as services move online, Ron is worried he will be left behind and the community feel of his town will be lost.

HUMBLE HELEN

Helen lives in a rural town with her wife. She commutes to the nearest city three times a week and tries to use the bus or cycle, but it's often not convenient due to timetables, weather, or infrastructure. However, she is trying to cut down her car use and be more environmentally friendly. Helen uses a smartphone for a range of things, including shopping online and communicating with friends and family.

SKILLED SHANE

Shane is an electrician and rents a home with his family in a small coastal settlement. As they cannot afford a second vehicle, his partner is restricted to working in the hamlet and they find the local shop expensive. When the family need something from further afield, it can take a while to prepare the van and public transport is very limited. Shane uses his smartphone frequently, but often loses his signal when out and about meaning that he can miss calls from clients.

ACTIVE ASHLEY

Ashley is 15 and lives with his parents and brother on the outskirts of a large town, he considers the area quite boring.

Ashley likes hanging out with his friends in town and or at the beach and finds it can be difficult to see friends in nearby villages without relying on a lift. Due to budget cuts, buses are now less frequent. He will occasionally cycle into town but his parents worry about the main road he needs to use.

OUR RURAL ECONOMY

Mobility is a derived demand, one derived from people needing to access everyday activities including work, education, healthcare, shopping, services, leisure, tourism and social interaction. These needs build the economy around which communities are formed and are key to the sustainability of our rural places.

Employment in our rural areas is at least as varied as in our urban centres but with some sectors being very much larger. However, jobs within our rural areas tend to be lower paid and often seasonal, with agriculture and tourism playing a key role in our countryside and coastal economies. Where higher paid people do live in rural areas, they often work in larger urban areas where there are greater concentrations of more lucrative jobs. Our larger towns and cities are attractive to those industries for a range of reasons, including the greater proximity to and concentration of the employment market, clients and consumers, competitors, research and educational institutions, as well as better regional, national and international connectivity.

On average agriculture, forestry and fishing account for 3.8% of rural-based employment (compared to 1% in urban locations) but this rises to over 10% in some locations. Employment in leisure and tourism-related sectors (accommodation/food and arts/entertainment/recreation) account for approximately the same levels of employment as in urban locations. However, employment in mining, construction and professional/scientific/technical sectors are all notably higher in rural areas. This may partly be due to where people live rather than some of those activities being undertaken in rural areas.

Agriculture in the South West employs nearly 65,000 people (Source: DEFRA) and accounts for nearly 20% of the farmed area in England. Both crops and livestock form important parts of South West farming which contributes major proportions of both to the wider English industry. The South West produces 40% of the country's hardy nursery stock and 30% of its maize as well as farming 39% of its dairy herd, 27% of its beef herd and 21% of England's sheep. The income

from farming in the South West increased by 46% between 2015 and 2019 to £644 million.

Tourism also plays a primary role in the South West's rural economy, in both its countryside and coast, making it also vital to the industry in England. Based on 2015 figures (Source: VisitBritain), the South West as a whole has the highest proportion of overnight trips in England, The 19.7 million annual trips account for 19% of the total revenue and generates spending of £4.4 billion in the local economy. Day visits account for 10% of the total in England, generating a further £5.2 billion annually. Around 85% of trips to the South West are made to countryside and coastal areas (small towns, villages, the countryside and the seaside) and the impact of this in transport terms is significant with 85% of trips being made by car and only 9% by public transport

CASE STUDY: MOORCAR (DEVON AND WIDER UK)

The Moorcar Co-operative Car Club is a social enterprise made up of small community-owned car clubs across the UK, working together to keep costs down and pass those savings onto members. Their mission is to help other communities start car clubs to make car-sharing a realistic alternative private ownership..

Moorcar started in Ashburton, Devon on the Southern edge of Dartmoor in December 2002 with one lease car and six members. The co-operative has now grown to ten car and bike clubs across fourteen locations.

Annual membership is £60, and vehicle rental fees are determined by the individual car clubs, typically based on an hourly or daily rate.

We have also spoken to relevant rural industries in the South West. Almost all of the organisations felt that car ownership was critical for their employees and/or clients. Access to the workplace was, unsurprisingly, critical. However, shops, cafes, and leisure venues felt that customers needed to be able to access their

businesses via car as alternatives were not feasible. This presents its own challenges with regards to parking in small villages and towns.

One concern that may become more prevalent as we emerge into the post-covid world is the attraction and retention of employees. Rural businesses rely on the communities around them to provide services for their employees, and the employees fund these services through patronage. With more homeworking, this is likely to have an impact on those services in larger rural centres, and, without these services, businesses will struggle to retain employees resulting in a vicious circle if they need to return to the office.

RURAL MOBILITY

Mobility in our rural areas has many of the same complexities as in our urban centres but with the added challenges of lower population densities and greater distances. This is compounded by the significantly less well-developed networks of infrastructure and services supporting mobility.

While our rural towns and villages may have networks of footways, these often end at the settlement boundaries, making walking even short distances to neighbouring settlements and isolated buildings often impossible. Cycling infrastructure is also less well-developed in our rural areas and the network often relies on the designation of routes rather than specific physical provision.

Across the country, many rural areas have lost local bus services as transport authorities have suffered significant cuts to budgets over the last decade and longer. Less dense populations and greater distances mean that patronage is lower and operational costs are higher than urban services, making them less commercially viable and placing a greater demand for public subsidy.

The rural South West, like many other areas, also lost many of its railway lines and stations following the Beeching cuts of the 1960s. This particularly affected smaller rural towns and villages which lost stations and branch lines compared to the larger urban areas which maintained more of their infrastructure and services. However, some success has been achieved in reopening the railways with the Dartmoor Line opening in late 2021 and more proposals currently under development.

Like many remote rural and coastal areas, air and maritime travel have key roles to play. The deeply indented coastline of the South West means there are numerous estuarial ferries around the region, while a larger ferry and air travel are a lifeline for the Isles of Scilly which rely on them for all their imported resources as well as its vital tourism industry.

The economy of the rural South West means that some modes are more prevalent than in other areas with a greater use of agricultural vehicles (including for personal travel), leisure vehicles (including caravans and campervans), and a wide range of pleasure craft along the coast and in the estuaries.

Freight and logistics play a vital role in supporting the economy of rural areas in terms of moving agricultural, forestry, fishing, mining and quarrying supplies and products, supporting e-commerce and online retail as well as providing wider logistics to support to the economy.

In terms of digital connectivity, overall our rural areas have 61% of the average broadband download speed of our urban areas but the speeds vary greatly from place to place. The small hamlets and isolated dwellings close to our larger urban centres benefit from similar download speeds to their urban neighbours but our smaller and more remote locations on average experience less than 40% of the urban download speeds. However, these averages hide some of the real problems where downloads speeds are even lower and both households and organisations struggle to have even a basic modern level of fixed digital connectivity. This is compounded by the large parts of our rural areas which suffer from a poor or non-existent mobile phone signal, meaning they lag even further behind their urban counterparts. Increasingly, communities and organisations, as well as mobility, are reliant on digital connectivity, but the variation between urban and rural areas is a major stumbling block in the levelling up agenda.

Even in our most remote areas, rural mobility of the future will not replace what is there already but will build on the good work that is already happening, both in individual communities and across the region. The strategy includes a number of case studies from the South West and further afield, highlighting some changes that can help the region deliver better rural mobility.

SUMMARY

Our rural places, both inland and coastal, near urban or remote, cannot be defined under one heading of 'rural'. The complexity of those places, their communities, their economies and the mobility network that supports them, means that we need to treat rural places as distinctly different to each other as they are to urban locations. The experiences of the communities in each of our rural places is different and the challenges they face varied. While there are many similarities between rural places, in order to provide the most appropriate mobility solutions, and to make them operationally and financially sustainable, we need take account of their different challenges, how future changes may affect them differently and how capacity and capability varies between them.

PLACE CASE STUDY

§ Name: Watchet

§ District: Somerset West and Taunton

§ County: Somerset

§ Place type: Coastal town

§ Population: 4,142

§ Population density: 3,399 per km^2

§ Average household income: £22,256

§ Proportion in full-time employment: 39%

§ Top 5 industries: Wholesale, retail and trade; human health and social work activities; manufacturing; construction; education.

§ Proportion without qualifications: 56%

§ Average property value: £157,933

§ Average journey time by public transport

· To food stores: 6 minutes

· To secondary schools: 36 minutes

· To large employment sites: 49 minutes

§ Average download speed: 24 Mbps

3

THE RURAL CHALLENGE

3   THE RURAL CHALLENGE

Our rural places face a significant range of challenges, environmentally, economically and socially, many of which mobility either contributes to or is affected by. This section of our strategy provides some of the detail behind these challenges the South West, as a predominantly rural area, is looking to find resolutions to.

WHY RURAL, WHY NOW?

Around 17% of the English population live in rural areas and in the South West that figure is higher at 33%. However, despite housing sizable populations, our rural places have been under-prioritised in policy-making, including the planning and delivery of mobility. Devolution, through the development of city regions, has brought significant focus to our major conurbations and surrounding supporting urban areas. The focus on city regions has, to some extent, drawn focus away from other locations, the majority of which are predominantly rural areas. Much of the South West is very distant from major cities; the furthest parts of Cornwall are 200 miles from Bristol and 300 miles from Central London. Focusing on cities of the South West means that the majority of the population of the South West remain unaffected by the major economic policy. In addition, the Government's Devolution Deals have, to date, almost entirely focused on major city regions, although the exception to this is in the South West, for Cornwall.

The Department for Transport's Future of Mobility: Urban Strategy was published in 2019, setting out the Government's policy for delivering modern, low carbon and integrated mobility, harnessing many changes already appearing in many of our urban areas. Urban mobility is starting to rapidly respond to some of these changes and rural mobility could be left further behind if it does not equally respond:

§   Automation: The world is increasingly becoming more automated with tasks previously undertaken by humans now being done by technology.

The impact on mobility has been evolutionary to date, with vehicles taking on more tasks themselves, but may become revolutionary if fully autonomous vehicles come to our roads, and fields. As well as personal and freight mobility, farming is becoming ever more automated with automated tractors now appearing on the market.

§   Cleaner transport: A revolution is already occurring in the propulsion of mobility with the Government's ban on new pure petrol and diesel cars in place for 2030 bringing more urgency to developments. Electrification (both battery electric and hydrogen fuel cell) is gathering pace, including within freight, air, maritime and agricultural sectors but there is potential for rural to be left behind without charging infrastructure investment.

§   New business models: New approaches to buying and paying for mobility have been entering the market with significant disruptions already occurring to some parts of mobility. Some of these new business models have yet to reach rural areas in significant scales but there may be opportunities to find new approaches which better suit rural use cases.

§   New Modes: Entirely new modes of transport and evolving established modes are appearing in the market and bringing change to rural areas. For example, e-scooters are being piloted in rural towns in Somerset, ride-hailing is starting to reach out from urban centres and low level air (drone) deliveries have been trialled from the mainland to the Isles of Scilly.

§   Data and connectivity: Mobility is increasingly reliant on data and digital connectivity both for operators and users. Both people and vehicles are becoming increasingly digitally enabled with smartphones owned by a majority of the population and nearly all new cars being connected. This connectivity enables us to better plan our journeys and keep up to date with the latest travel information. It also enables operators to optimise their services to better meet consumer needs.

§ Changing attitudes: Major social trends are significantly affecting mobility and how we interact with it. The increase in environmental concern is pushing people towards more active, publicly-available and shared modes while the move of some people to home-working is altering commuting patterns. As changes continue to evolve, mobility will need to react but how these trends affect rural areas may be different to their impacts on urban places, with policy and provision adjusted accordingly.

To the DfT's six key changes, we add aggregation, the bringing together of different modes and services to support integration, interchange and the intensification of activity. Rural hubs and freight consolidation present physical opportunities for aggregation while Mobility-as-a-Service may do so digitally.

To date, rural areas have often lagged behind their urban counterparts in seeing these changes. Urban areas, with their larger and more dense populations and more developed networks attract more mobility innovation and investment, particularly from the private sector where commercial models may be more likely to succeed due to the scale of the available market.

However, there is a growing drive to widen the focus of mobility policy and innovation and to be more inclusive, enabling areas more peripheral to the city regions to gain more attention. The Department for Transport is now developing a Future of Transport: Rural Strategy, turning the focus to our countryside and coasts following its call for evidence in 2020. Also, across the seven English sub-national transport bodies, there is a range of work on rural being undertaken.

Wider government policy is also driving a greater focus on what are often seen as more peripheral areas, including through plans for levelling-up and decarbonisation.

The COVID-19 global pandemic has also had specific impacts on our rural places both at the height of restrictions and as we have opened up again. The pandemic exacerbated the isolation of many of our rural populations, both as individuals and as communities. It also brought shifts in populations as people stayed longer in second homes and demand for rural living increased as a result of greater flexibility for some types of worker. The local economies were also affected by specific trends including people being prevented from taking holidays in the UK which was followed by a wave of 'staycations' as national restrictions were lifted ahead of those on foreign travel.

CASE STUDY: EBIKE CORNWAL (CORNWALL)

Based in Penzance and working with partners across the region, EBIKE Cornwall are electric bike hire specialists operating out of six locations across the county.

Dedicated to getting people out of cars and onto two wheels to explore Cornwall, EBIKE Cornwall offer e-bike hire as well as route planning information to best suit users' interests and fitness levels.

EBIKE Cornwall opened in 2021, at the height of Covid-19 lockdowns, believing that electric bikes could get more people outside and exploring Cornwall in a fun, healthy and sustainable way. After a successful first year on the High Street, they are now working with hotels, resorts and others to build a regional network of electric bikes.

Photo credit: EBIKE Cornwall

Even without the impact of the pandemic, our rural places are continuously changing, from the long-term decline of traditional industries and the emergence of new ones, to the pressure of rural areas as urban space demands more land. The decline of heavy industries in Cornwall to the proposed Spaceport and potential for new mineral extraction to support technology manufacturing and the ever-growing and diversifying tourism industry alongside continuously evolving agricultural sectors. Additionally, there will be further changes following

the UK's withdrawal from the EU and the implementation of a new environment-focused subsidy regime and the potential for trading in eco-system services.

How we develop mobility policy is also changing. For decades the focus has been on planning for modes of transport and 'predict and provide'; now we are taking a people and place-focused approach which shines a light on the needs of different individuals and communities and what specific support local areas need to succeed.

There are also emerging new approaches to delivery and, as the South West STBs, we are keen to learn whether there are better, more operationally and financially sustainable ways to provide mobility in rural areas. This may be through local authorities and the wider public sector, led by the private sector ,or delivered by communities themselves. A key proposal for this strategy is the piloting of different approaches to delivering mobility for our rural areas.

BUILDING ON RURAL STRENGTHS

While we recognise the challenges faced in our rural places, we must also highlight and build upon their strengths and the benefits they provide locally, regionally and across the country as a whole.

- § Rural areas are and will continue to be at the forefront of our efforts to control and plan for climate change, meeting our net zero targets and building climate resilience. From supporting the offshore, coastal and inland renewable electricity generation to providing flood protection to our homes and industry, rural areas will be pivotal to these challenges.

- § Our countryside and seas will also be central to reversing the decline of nature, stopping eco-system breakdown and achieving environmental net gain.

- § Alongside the environmental challenges, our rural areas need to produce an increasing amount of food to support a growing population, provide food security and reduce carbon emissions from food production and transport.

- § Rural and coastal areas also provide a wider range of resources for our communities and economy, including land, drinking water, and raw materials for construction and manufacturing.

- § Much of our nationally significant tourism and leisure industries are located in the South West's rural and coastal areas and are vital to the sustainability of many of our local communities and economies.

However, the benefits of our rural areas go beyond all this to the quality of life and cohesion of communities who live, work, learn and play every day in our countryside and along our coasts, and who require our support as much as their urban neighbours.

CASE STUDY: CONNECTED KERB KENT (WIDER UK)

Connected Kerb have been selected to deliver electric vehicle charging infrastructure across 20 Parish Council sites in Kent to improve accessibility for EV motorists and encourage a wider shift to EVs by alleviating charging 'blackspots' in rural areas. A total of 40 charging units are being installed, each rated at 7kW. The project has received funding from the Kent Lane Rental Scheme, the Department for Transport, the parishes themselves and, for some locations, 75% of the costs were financed through the on-street residential chargepoint scheme.

FIGURE 7: RURAL CHALLENGES – SOCIAL

NATIONAL

Rural areas are home to 9.7 million residents in England, equating to 17% of the population.

SOUTH WEST

Rural settlements in the South West are home to 1.8 million residents, equating to 33% of the population
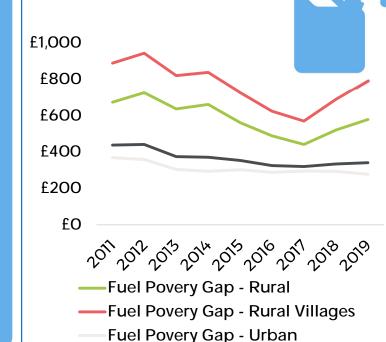
EXPENDITURE

Rural areas have higher transport costs as a percentage of disposable income than urban areas, with rural villages facing the highest transport costs overall. Alongside higher house prices, this creates a financial burden for rural residents, as well as equity concerns.

■ Transport costs
◆ Transport costs % income

FUEL POVERTY

Fuel poverty is more prevalent and more severe in rural areas than urban areas, with rural villages facing the largest fuel poverty gap overall, adding to the financial burden faced by rural residents.

— Fuel Povery Gap - Rural
— Fuel Povery Gap - Rural Villages
— Fuel Povery Gap - Urban
— Fuel Povery Gap - England

HOUSE PRICES

As a multiple of household income, house prices are much higher in rural areas urban areas, placing additional financial pressures on rural households.

	Average Household Income	Average Property Value	Multiple of Income
Rural	£48,877	£324,504	6.6
Urban	£43,003	£260,016	6.0

AGEING POPULATION

There is a greater proportion of residents aged 66+ in rural areas (32%) compared to urban areas (26%). Older users have differing and greater mobility requirements, which can challenge rural authorities.

DOWNLOAD SPEEDS

Average download speeds are substantially lower in rural areas (25 Mbps) than urban areas (36Mbps). This can limit the ability to work from home, access digital services, and communicate with loved ones.

DEPRIVATION

The Index of multiple deprivation (IMD) is relative measure of deprivation that combines data on income deprivation, employment deprivations, education and skills deprivation etc.
The average IMD in the South West is substantially lower in rural areas compared to urban areas. As such, mobility interventions that support access to these key services could help to reduce deprivation in rural areas.

AFFLUENCE

There is a higher proportion of the population in lower affluence percentiles in rural areas, and a higher proportion of the population in higher affluence percentiles in urban areas.

LIFE EXPECTANCY

Life expectancy, particularly for males, is higher in rural areas than urban areas, which is a positive aspect of rural living.

AGEING POPULATION

The most prominent age group in rural areas is 50 – 59, compared to 25 – 34 in urban areas. This influences issues such as car ownership, demand for schools and access to health care.

LIVING OUTSIDE OF SETTLEMENTS

29% of rural residents live in small hamlets or the open countryside, limiting accessibility and increasing reliance on private cars.

HOUSE PRICES

After London, rural areas face amongst the highest house prices as a multiple of earnings.

FIGURE 8: RURAL CHALLENGES – ECONOMIC

NATIONAL

SOUTH WEST

SCHOOLS

Rural schools are negatively impacted by small budgets, high transport costs, high teacher salaries and rural poverty. Mobility interventions could help to alleviate these constraints.

HIGHER EDUCATION

Higher education qualifications are less prevalent among the working population in rural areas, limiting employment opportunities.

INVESTMENT

Urban areas see greater investment per employee, typically recording investment worth 105% of the England average, compared to 75% in rural areas , which limits rural productivity and income.

PRODUCTIVITY

Productivity in Predominantly Rural areas contributed 15% of England's GVA in 2019, compared to 45% in Predominantly Urban areas and 28% in London, making rural areas less attractive for investment.

INCOME

In 2020, median workplace-based earnings in Predominantly Urban areas (excluding London) were £25,400, compared to £22,900 in Predominantly Rural areas, creating income inequality.

SKILLS AND LABOUR

The shortage of labour and skills is a significant challenge facing rural businesses in the South West, and is the result of limited housing affordability, poor transport connections, the ageing population and the impact of Brexit.

EMPLOYMENT

The proportion of those in full-time employment in rural areas (42%) is lower than in urban areas (45%). This is more pronounced in Peninsula, where the proportion of those in full-time employment in rural areas is 41% compared to 44% in urban areas. In Western Gateway the proportion in full-time employment in rural areas is 43% compared to 45% in urban areas. This can limit earning potential.

QUALIFICATIONS

Across the South West the proportion of individuals without any qualifications is 13%, but is much higher in moderately affluent and less affluent rural areas compared to urban areas. This limits employment opportunities for these individuals and contributes to the skills and labour shortage.

Proportion without Qualifications

Rural – Affluent	8%
Rural - Moderately Affluent	29%
Rural - Less Affluent	40%
Urban	17%
South West Average	13%

Productivity

Rural areas account for 58% of economic output in the South West, which is much greater than England where 22% of economic output is from rural areas. However, rural productivity (GVA/workforce job) is 8% lower than urban productivity in the South West and 10% lower than the average for rural areas in England.

The services sector is the largest contributor to GVA across Peninsula (38%) and Western Gateway (4.%). Agriculture is a much more substantial contributor to GVA in Peninsula (3.5%) than Western Gateway (1.7%).

INCOME

The average household income in moderately affluent and less affluent rural areas is substantially lower than urban areas, affluent rural areas, and the South West average. This income inequality places rural communities under greater financial pressure.

Average Household Income

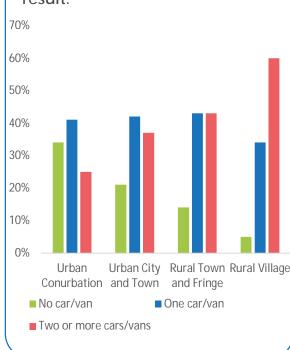|	
Rural - Affluent	£54,746
Rural - Moderately Affluent	£35,117
Rural - Less Affluent	£28,908
Urban	£42,130
South West Average	£48,210

FIGURE 9: RURAL CHALLENGES – MOBILITY

NATIONAL

SOUTH WEST

CAR DEPENDENCY

Those living in the most rural areas made 87% of their journeys by car, compared with 67% of those living in the most urban. This creates challenges for decarbonisation, as well as equity issues for those without access to private vehicles.

JOURNEY DISTANCE

People living in the most rural areas travelled almost twice as far per year than those living in the most urban areas, resulting in increased travel time and travel costs.

Average Distance (Urban Conurbation)
Average Distance (Urban City and Town)
Average Distance (Rural Town and Fringe)
Average Distance (Rural Village)

EV CHARGE POINTS

There are fewer EV charge points per 100,000 in the South West than the UK, but there are substantially more in rural areas, which will positively influence the uptake of EVs.

JOURNEY TIMES

Journey times to key services are longer in rural areas than urban areas, impacting on travel costs, quality of life and decarbonisation.

	Town Centre	Food store	Secondary School	Further Education	Employment Site
Remote	25	12	19	30	52
Rural	16	9	14	17	38
Urban	11	7	10	12	16

CAR AVAILABILITY

There are higher levels of car ownership in rural areas and relatively few households without a car. However, those households suffer additional isolation as a result.

No car/van
One car/van
Two or more cars/vans

BUS AVAILABILITY

Bus availability is lower in rural areas compared to urban areas and lowest in rural villages, creating a lack of suitable transport alternatives which forces residents into private modes.

EV UPTAKE

Projections for EV uptake are significantly affected.

EV Share (2030)

South West	30%
Rural (Affluent)	31%
Rural (Less Affluent)	27%
Rural (Moderately Affluent)	28%
Urban	29%

BUS AVAILABILITY

There are more bus stops in urban areas (9.7) than rural areas (6.0), and more services in urban areas (1.7 per hour) than rural areas (1.4 per hour), forcing rural users onto private modes.

ENERGY CONSUMPTION

Road transport energy consumption is greater in the South West than the UK average, and substantially greater in rural areas, which impacts costs and transport decarbonisation.

Road Transport Energy Consumption per 1,000

UK	587
South West	639
Rural	766
Urban	352

JOURNEYS TO SHOPS

More residents travel to local shops by car in rural areas, whereas more residents travel to local shops by bus or on foot in urban areas, reflecting limited mode choice.

DAILY VEHICLE MOVEMENTS

52% of all vehicle trips originating in rural areas of the South West are rural to rural trips. Of these, 47% are within the same upper tier local authority boundary. The proportion of these entirely rural trips is generally higher away from major urban centres.

There is significant variation across local authorities for the proportion of urban vehicle trips that end in rural areas. Primarily urban areas have low levels of such trips, between 5% and 11%. In areas with large rural expanses, this varies from 16% to 39%.

THE CASE FOR RURAL INVESTMENT: THE CHALLENGES AND STRENGTHS

The case for investment in mobility for our rural places is clear and unequivocal. They are at the forefront of the climate change challenge and our need to meet Net Zero targets. Without support for mobility we cannot reduce carbon emissions from rural transport, we cannot provide alternatives to the dominance of private cars in our countryside and we cannot give communities opportunities not to travel, including through digital communications. We also need investment to mitigate the impacts of climate change including making our rural transport infrastructure resilient to its effects.

Our future rural economy also needs support from transport investment to deliver growth and diversification. Our tourism sector in the South West is vital to the industry as a whole across England but this presents challenges and we need to find new ways to move our visitors around the region. Our agricultural industry is changing and the increasing need for food security and productivity means more transport of produce. Our growing environment economy in rural areas needs transport to support the movement of resources and employees including for renewable energy generation.

However, alongside our coming challenges are those faced now by our rural communities across the South West. Like so many rural areas, our residents have higher transport costs than their urban friends and they experience greater fuel poverty, now compounded by rising energy bills. We have an ageing population who are more reliant on publicly-available transport but our bus networks have drastically declined over the last decade due to reduced local authority budgets. Our young people, who generally secure lower qualifications, are forced into driving to access education and employment while also struggling to find higher paid opportunities and affordable housing where they have grown up.

Compared to urban areas, our rural economies pay employees less, have less investment and are less productive. They are also facing shortages of the right skills, particularly in the agriculture and tourism sectors, due to poor transport connections alongside housing affordability, an ageing population and the impact of Brexit. Our residents have to travel longer to access employment as well as daily needs of goods, education and healthcare. As services have continued to decline in our rural areas, the ability of people to live locally and to access their needs within easy reach has become much more rare.

Of our total population in the South West, one third live within the rural area, amounting to 1.8m people. Without investment in rural mobility, a substantial proportion of the South West's population and the economies they support, will continue to be hindered by poor accessibility and connectivity, holding back not only the rural areas but the region as a whole.

CASE STUDY: RURAL ELECTRIC BUS FLEET (WIDER UK)

SP Energy Networks have launched the UK's first fleet of six fully electric buses serving rural communities, in partnership with transport group Stagecoach West Scotland. Due to the length of the rural bus route, this project will be the first in Scotland to introduce opportunity charging where buses benefit from rapid and intense charges of power on route, rather than buses charging overnight.

This is through the introduction of Scotland's first 'pantograph' charging point at Kilmarnock Bus Station, which will supply power through special electrical connectors built into the roof of the zero-emissions electric buses.

Photo credit: SP Energy Networks

4

FUTURE RURAL SCENARIOS

4   FUTURE RURAL SCENARIOS

Mobility policy, whether general to all areas or specific to rural, needs to be aware of the changes affecting us all, whether they are environmental, social or economic in nature. Without a good understanding of what is changing in the world around us, policy is likely to focus purely on the current challenges and miss changes that may come to prominence over the period which policy is in place. Those emerging changes may replace existing challenges, and potentially quickly, meaning that policy becomes out of date in a short period of time.

This strategy is live to this issue and has taken a scenario-based approach to understand both current challenges and future changes. Our analysis has considered how changes faced by rural areas may coalesce in different combinations to form a range of plausible alternative futures.
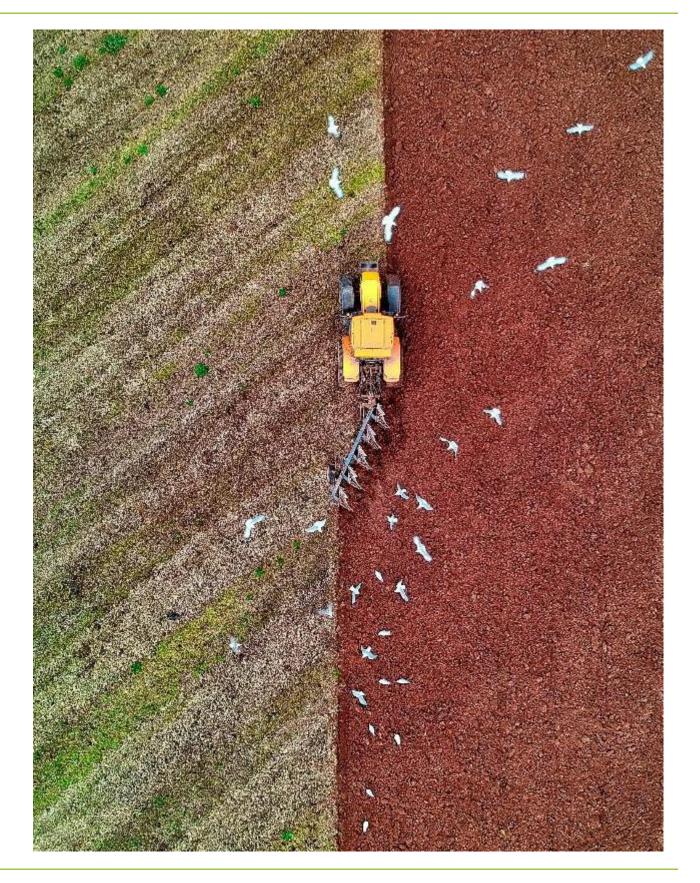
SIGNALS, TRENDS AND TRAJECTORIES

There are global and national changes that our urban and rural places face together, some of which have particular impacts on rural areas, while there are also specific changes that only affect our countryside or coastal locations.

We define these changes as signals, trends and trajectories and they can be categorised under the commonly used 'PESTLE' headings of political, environmental, social, technological, legal and economic.

Figure 10: Signals, Trends and Trajectories

Signal → Trend → Trajectory → Business as usual

Signals: these are the first signs of a new change. These relate to immature activities which have yet to result in widespread government, development or investment activity. Current examples of signals could include the COVID-19 related shift to rural living, rural energy communities and eco-villages.

Trends: these are instances of change where national and sub-national policy is being formulated, a range of trials are being undertaken, or significant public or private sector investment is being made. Current examples include eco-system breakdown, various automated shuttle pilots around the globe, and the wider discussion of the rural agenda.

Trajectories: are changes that are becoming established where a clear, if not fixed, route to a new 'business as usual' can be seen. This includes growing food demand, social isolation and rural/coastal second homes.

Over 100 signals, trends and trajectories have been identified in developing this strategy with examples provided below under the PESTLE headings:

- § Political: Brexit, devolution of decision-making, terrorism

- § Environmental: climate change, air quality, eco-system breakdown, rewilding

- § Social: COVID-19, growing population, inequality, changing family composition, ageing population, isolation and loneliness

- § Technological: automation, artificial intelligence, e-bikes, dynamic demand responsive transport, technology intensive farming, digital connectivity, rural hubs

- § Legal: cyber-crime

- § Economic: globalisation, unequal development, growing food demand, protectionism, food security, e-commerce, scarcity of resources

CASE STUDY: GO-HI (WIDER UK)

In order to test the concept of Mobility-as-a-Service (MaaS) in Scotland, HITRANS have developed the bespoke GO-HI app, which provides instant access to information on buses, trains, taxis, car hire, car clubs, bicycle hire, air travel and ferries. This allows users to plan their journeys and find, book and pay for all modes of transport in one place using any iPhone or Android mobile device. GO-HI is powered by Fleetondemand's Mobilleo MaaS platform. The project engages the underlying Mobilleo platform with several new transport partners, as well as existing platform partners including Enterprise, Bewegen, Brompton Bike Hire, Stagecoach Bus, West Coast Motors, Inverness Taxis, ScotRail, Loganair, Shotl, Skedgo, Orkney Ferries and Northlink Ferries.
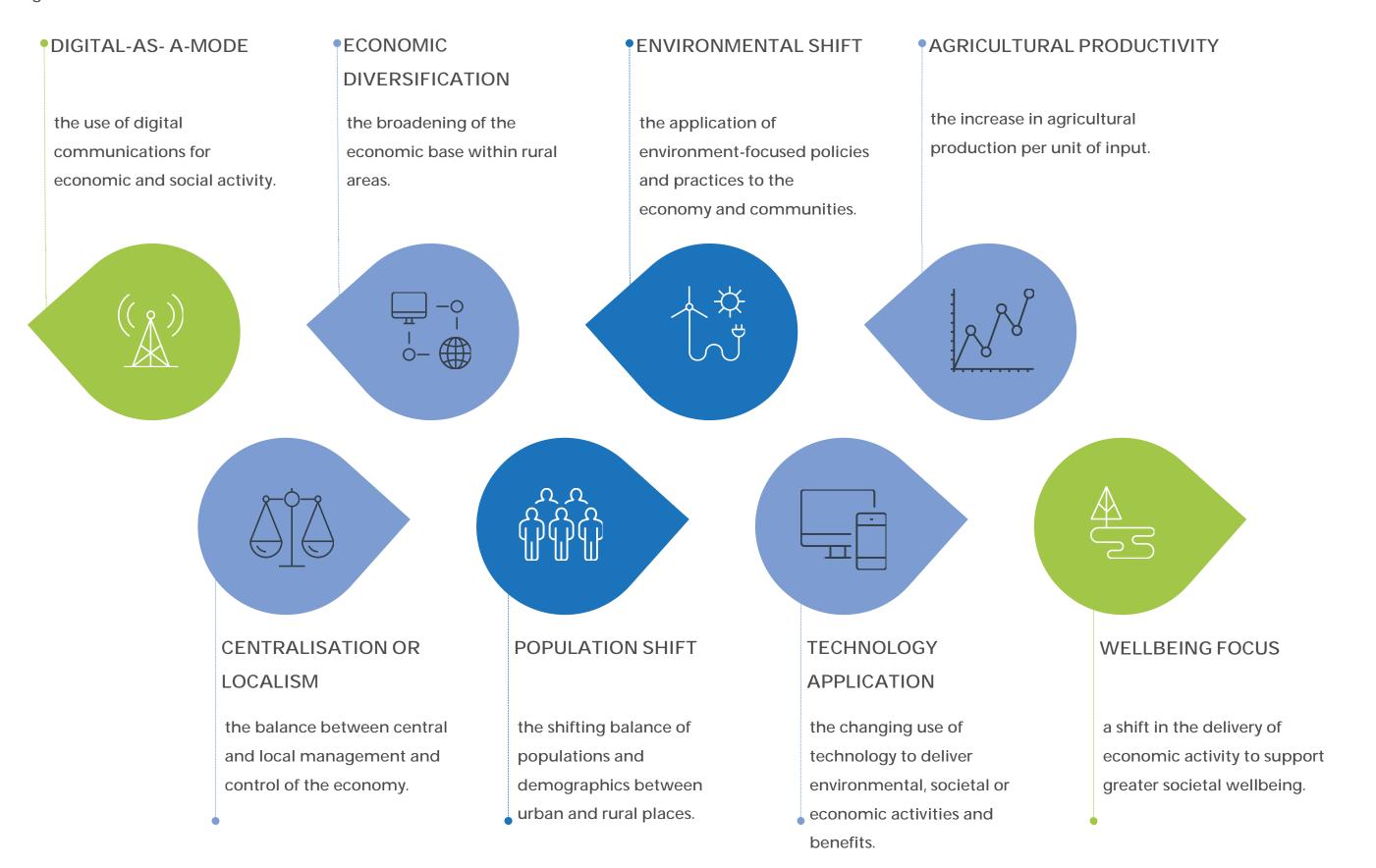
Photo credit: Mobilleo

SCENARIO LEVERS

The 100+ changes have been categorised under a number of headings to provide eight 'levers' used in our scenario planning process. These levers include:

Figure 11: Scenario Levers

DIGITAL-AS- A-MODE

the use of digital communications for economic and social activity.

ECONOMIC DIVERSIFICATION

the broadening of the economic base within rural areas.

ENVIRONMENTAL SHIFT

the application of environment-focused policies and practices to the economy and communities.

AGRICULTURAL PRODUCTIVITY

the increase in agricultural production per unit of input.

CENTRALISATION OR LOCALISM

the balance between central and local management and control of the economy.

POPULATION SHIFT

the shifting balance of populations and demographics between urban and rural places.

TECHNOLOGY APPLICATION

the changing use of technology to deliver environmental, societal or economic activities and benefits.

WELLBEING FOCUS

a shift in the delivery of economic activity to support greater societal wellbeing.

The scenarios are formed by using these levers in different combinations to theoretically alter the speed of the changes controlled by each lever. Moving a lever backwards shows a slowing of the changes and moving it forwards, brings an increase in the speed of changes. When the levers are moved in different combinations, taking account on how the movement of each lever may affect the others, they enable us to consider how different scenarios for the future of our rural places may occur.

PLACE CASE STUDY

§ Name: Littledean

§ District: Forest of Dean District

§ County: Gloucestershire

§ Place type: Rural village

§ Population: 702

§ Population density: 3,565 per km²

§ Average household income: £28,703

§ Proportion in full-time employment: 46%

§ Top 5 industries: Wholesale, retail and trade; human health and social work activities; manufacturing, construction, education

§ Proportion without qualifications: 41%

§ Average property value: £186,324

§ Average journey time by public transport

· To food stores: 8 minutes

· To secondary schools: 24 minutes

· To large employment sites: 37 minutes

§ Average download speed: 24 Mbps

RURAL SCENARIOS

Six plausible scenarios for the future of our rural areas have been developed as follows:

§ The Status Quo

§ High Tech Rural

§ Natural Rural

§ Rural Retreat

§ Rural Revival

§ Coastal Renewal

CASE STUDY: TING (WIDER UK)

Ting is a demand responsive bus service launched in the west of Huntingdonshire in October 2021 for a six month trial. Cambridgeshire & Peterborough Combined Authority are partnering with Stagecoach East to provide the service.

The service will provide passengers with the option to book an on-demand, tailor-made service in real time by using the Ting-trips app or calling their local call centre, allowing people to order a bus from even the most remote locations.

Bookings can be made up to seven days in advance and will run between 7am-7pm Monday-Friday and 8am-4pm Saturday. fares of £2 are charged anywhere within the service zone.
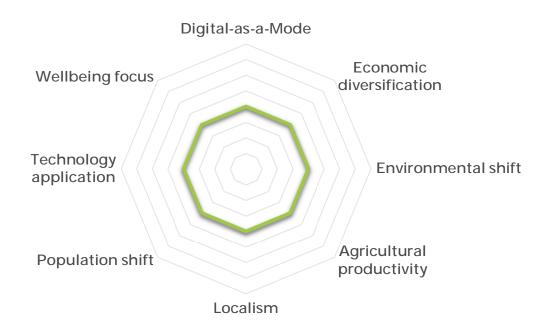
Photo credit: Stagecoach

THE STATUS QUO

This scenario demonstrates the existing situation in rural areas or the continuation of current rates of change. The status quo may therefore continue to evolve over the coming decades as change occurs, but the rate of change is not directly affected by public sector intervention.
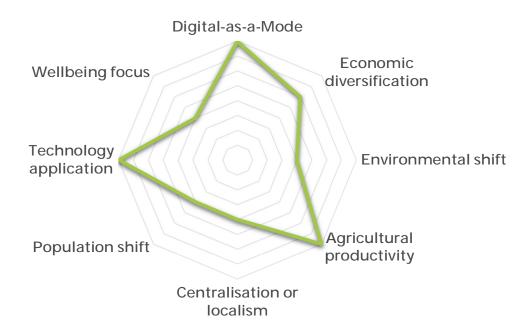
Figure 12: Status Quo Scenario

HIGH TECH RURAL

This scenario sees more public and private sector investment in technology as the main means of delivering change for rural communities and economies. Technologies are applied widely and specifically to rural use cases and business models with the application of AI, automation, on-demand manufacturing, new transport modes and infrastructure and smart solutions revolutionising the rural economy. This is supported by enhanced investment in digital communications which supports e-commerce, remote working and the provision of remote services to communities. As a result, the rural economies diversify with new and enhanced sectors leading to broad technology-enabled and digital-led growth. Whilst employment reduces in some sectors, especially where greater

automation replaces physical work, causing some out-migration of less skilled populations, new economic sectors and remote working leads to new tech-enabled residents to move in.

Figure 13: High Tech Rural Scenario

The evolving demographics resulting from changing sectors leads to an increase in more affluent residents who are more likely to have access to a car; this could lead to some lower demand for publicly-available and shared modes. An increase in remote working may reduce the frequency of commuting journeys for some but those journeys may be longer when they do occur as people live further from their workplaces. The time released by reduced commuting may lead to other journeys, perhaps more locally, as people make more leisure-based trips.
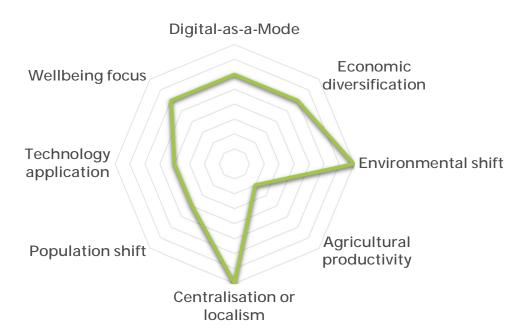
The tech-enabled diversification and growth of the economy increases demand for movement generally, both personally and for freight. The intensification of agricultural increases the quantum of products moved but the automation of systems reduces workforce related movements.

Improved digital connectivity leads not only to more remote working but also remote provision of other services (e.g. education, health care, etc.) which could reduce the frequency of journeys. The growth in e-commerce could reduce

personal trips but continue the growth in freight movements within rural areas, both from originators and to households.

NATURAL RURAL

Figure 14: Natural Rural Scenario

This scenario sees a shift in the role of rural places to playing a greater role in environmental action, being in the front-line of action against climate change and eco-system breakdown. Significant areas of land are given over to a wider range of eco-system services, rewilding, renewable power generation, climate off-setting and resilience against climate change, including help to protect coastal and urban areas.

Agriculture has shifted away from the least viable locations but this leads to an intensification of activity in the land remaining in food production. The rural economy has diversified, particularly into environment-focused businesses building on land transferred to related activities.

The population remains similar as the movement out of some workers in the agricultural sector is broadly balanced by others in environmental jobs, therefore, population-led demand for mobility remains similar.
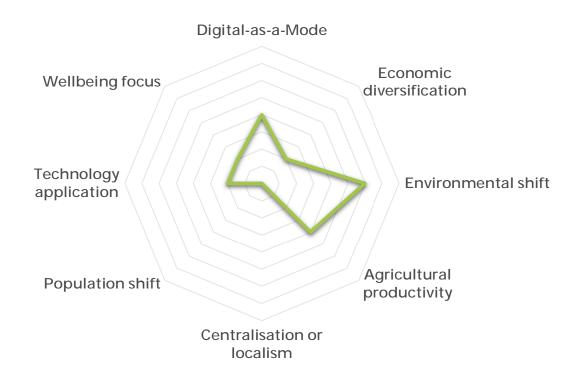
An increase in remote working may reduce the frequency of commuting journeys for some but those journeys may be longer when they do occur as people live further from their workplaces. The time released by reduced commuting may lead to other journeys, perhaps more locally, as people make more leisure-based trips.

Other services move online, including e-commerce, reducing the need to travel where people wish to but freight in rural areas increases. However, a focus on localism with more services and activities provided within communities further reduces need for longer distance journeys and facilitates greater levels of active travel.

However, growth in movement related to some new and growing environment-focused sectors increases demand for mobility but it is more closely managed by these sectors and there is a greater focus on active, publicly-available and shared modes where travel is necessary. Agricultural traffic reduces in areas given over to the environmental sector, but intensity may increase in areas remaining in production.

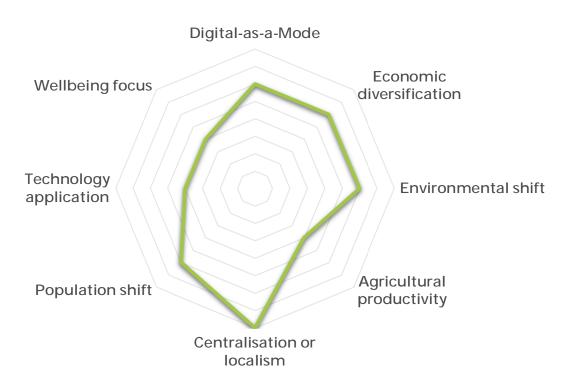## RURAL RETREAT

Figure 15: Rural retreat Scenario

A more centralised focus for the provision of services means longer and more complex journeys and less accessibility for those without a car. The reduction in rural populations across demographics reduces demand for mobility, making the provision of rural transport services, and their public sector support, even more precarious and many stop operating, further reducing access to services.

With the comparative performance of rural digital communications worsening, commuting in place of remote working increases, as rural residents cannot perform their roles as well as urban or workplace-based employees. E-commerce has also reduced as poorer digital communications fail to keep up with the capacity and speed of urban competitors. Two tiers of rural are in operation; those closer to major urban areas that benefit from the reaching out of digital and transport connections, and those that are too far from such areas and relying on their own limited communication networks.

With lower populations and poor communications the business case for private sector investment in new mobility services reduces. Combined with the reduction in local authority support for publicly-available and shared transport, rural residents are locked into car-dominated mobility.

COASTAL RENEWAL

Figure 16: Coastal Renewal Scenario

This scenario specifically looks at a future for coastal areas, where they become the focus for the renewal of wider economies. Diversification has resulted from new and improved communications and technologies supporting the environment economy, remote working, new aquaculture and fishing business models, as well as widening markets for local co-operatives, creatives, artisans and new leisure sectors. With more coastal employment opportunities, the population increases alongside the immigration of longer-term remote workers.

Planning policies support this through increasing housebuilding for local communities and local authority incomes increase enabling improved local services to be delivered. Coasts are on the front-line against climate change and

eco-system breakdown. Significant areas of coastline and seabed are given over to rewilding, marine protection, renewable power generation, climate off-setting and resilience against climate change.
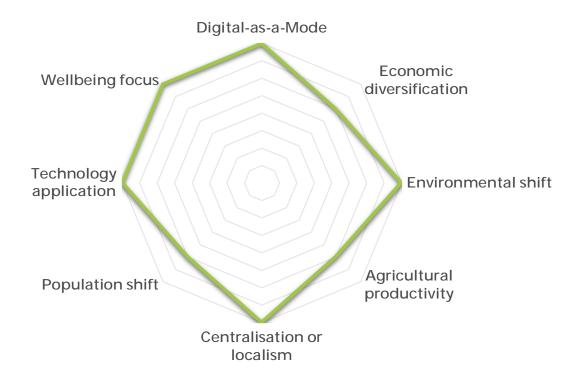
There is a general increase in mobility demand due to growing populations and economic sectors. However, many sectors look to manage this demand through digital communications and the use of active, publicly-available and shared modes. Travel demand for traditional industries may reduce but new and growing sectors, including those focusing on the environment and tourism, will attract more employees and visitors to the areas.

Improved digital communications have supported remote working and digital access to services, reducing the need to travel more regularly where people wish to. but this releases more time for leisure journeys. A focus on localism reduces the distance people need to travel and supports local economies.

RURAL REVIVAL

This scenario combines a technology and environmentally led future for rural areas. New technologies and stronger digital communications lead to a stronger and more diversified economy, enabling some movement of urban-based activities into rural places. The environmental shift has put rural areas at the front-line of action against climate change and eco-system breakdown. Significant areas of land are given over to rewilding, renewable power generation, climate off-setting and resilience against climate change, including protecting urban areas. With more opportunities across age groups and affluence levels, rural populations increase, with the economy supported by planning policies to increase home building for rural communities and further supported by improved service provision resulting from increased rural local authority incomes.

Figure 17: Rural Revival Scenario

Expanding populations, resulting from a growing and diversifying rural economy, generate increases in demand for rural mobility. However, more is done online, including remote working, for those who can, which reduces demand per person. A greater focus is also put on the local provision of services. Combined, these trends result in some reduced demand for commuting and accessing services physically over longer distances, but this is replaced by shorter local trips and, to some extent, by more leisure journeys.

With greater economic activity and e-commerce, business-related and freight transport increases but there is a greater focus on reducing the need to travel, where residents wish to, and the promotion of more active, publicly-available and shared modes where travel is necessary. With the intensification of agriculture in some locations the weight of products transported increases but other areas become quieter as more land is given to environmental sectors.

With growing populations and more competitive digital communications, new mobility modes and service models are delivered in rural areas, providing greater choice.

PLACE CASE STUDY

- § Name: Okehampton

- § District: West Devon

- § County: Devon

- § Place type: Remote rural town

- § Population: 8,671

- § Population density: 3,268 per km^2

- § Average household income: £32,135

- § Proportion in full-time employment: 49%

- § Top 5 industries: Wholesale, retail and trade; human health and social work activities; manufacturing; education; construction

- § Proportion without qualifications: 24%

- § Average property value: £186,652

- § Average journey time by public transport

  - · To food stores: 8 minutes

  - · To secondary schools: 17 minutes

  - · To large employment sites: 33 minutes

- § Average download speed: 36 Mbps

SUMMARY: APPLYING THE SCENARIOS

In understanding the scenarios, we need to be clear that they are generalised for rural areas as a whole across the South West. How they play out across the wide range of rural areas may differ greatly, from edge-of-urban to remote, rural, coastal and island communities, lowland to upland. In developing a more localised rural mobility policy, these scenarios will need to be reviewed and adapted to specific circumstances of each area.

These plausible scenarios reveal a range of positive and negative possibilities. Clearly, the desire should be to deliver a scenario that creates stronger and more socially, environmentally and economically sustainable rural communities and economies with the necessary accessibility, connectivity and mobility to support them. These scenarios and the levers used to develop them have been used to help shape this strategy and formulate a set of interventions to deliver a more positive vision for the rural South West.

5

OUR RURAL MOBILITY VISION

5 OUR RURAL MOBILITY VISION

The scenarios presented in the previous section revealed a range of possible visions for the future of our rural areas. Those scenarios were primarily environmental, social and economic visions rather than for mobility in the rural South West. This section takes the outputs from the scenario development process and, alongside an understanding of wider policy drivers, presents a vision for the future of mobility in our rural areas.

POLICY FRAMEWORK

SUMMARY OF KEY THEMES

There are a wide range of national, regional and local policies that have been used to inform this strategy and identify a range of key themes. The National Planning Policy Framework provides the core planning framework used to inform the development of local plans, however, Net Zero Strategy and Decarbonising Transport Plan, Bus Back Better, Gear Change and the Future of Transport Rural Call for Evidence, are amongst a range of other policies that can all be used for developing transport and mobility policy. Some of the key themes derived from the latter documents include decarbonisation, air quality, active travel, publicly-available transport, data and digital connectivity and technology.

Decarbonisation is a specific challenge due to high car dependency in rural areas and the machinery used in agriculture, however encouraging more active travel and electrification of modes can contribute to lowering carbon emissions in rural places. In turn, air quality will be improved and digital communications will help improve connectivity in rural communities and allow real time information for public transport as well as providing opportunities for alternative mobility options, such as car sharing and demand responsive transport.

We have also reviewed national policy related to key rural economic sectors including agriculture, such as the Farming Innovation Programme, Rural Proofing in England 2020 and The Path to Sustainable Farming: An Agriculture Transition

Plan 2021 to 2024. Agriculture and farming is both an economic and environmental theme as there is a need to decarbonise machinery and transport and support its role in climate resilience and environmental net gain.

Local plans and transport plans produced by the local authorities within Western Gateway and Peninsula were also reviewed along with the relevant documents produced by Local Enterprise Partnerships (LEPs) that operate within the southwest region. Further themes emerged with a local community focus and economic growth. Additionally, the productivity and competitiveness of the region emerged as key themes including in relation to tourism, local economic opportunities, and the reinvigoration of smaller rural communities. All of the key themes are outlined in the table below.

Key Themes		
Environment	**Economy**	**Social**
§ Decarbonisation § Air quality § Agriculture and farming § Visual impacts	§ Agriculture and farming § Productivity and competitiveness of the region § Economic growth § New business models § Data and digital connectivity § Tourism § Technology	§ Community § Marginalised groups and ageing population § Accessibility and social exclusions § Covid-19 and other shock events § Active travel § Rural connectivity

GOVERNMENT'S LEVELLING-UP PLAN

In February 2022, the UK Government released its Levelling Up White Paper, outlining its plan to end geographical inequality across the UK. The paper has a nationwide approach for urban and rural settlements, suggesting a new policy regime is needed to reverse historical planning trends. This will be based on the following five reinforcing pillars:

§ Setting clear and ambitious medium-term missions which will include boosting productivity, pay, jobs and living standards by growing the private sector, especially in those places where they are lagging; spreading the opportunities and improve public services; restoring a sense of community, local pride and belonging; and empowering local leaders and communities, especially in those places lacking local agency.

§ Central government decision-making will be fundamentally re-orientated

§ The UK Government will empower decision makers in local areas

§ The UK Government will transform its approach to data and evaluation

§ The UK Government will create a new regime to oversee levelling up missions.

The paper recognises the disparities between urban and rural places and addresses them throughout the document, including looking to enable increased transport frequencies, reduced fares and new forms of demand-responsive transport. The government will be publishing a second report on rural proofing in England later in 2022.

ANTICIPATED NATIONAL RURAL TRANSPORT STRATEGY

After the publication of the Future of Mobility: Urban Strategy in Spring 2019, the Department for Transport has sought evidence to be incorporated into its Future of Transport: Rural Strategy. The outcome of the call for evidence identified key rural issues and challenges, including:

§ High car dependency

Table 2: Policy Key Themes

§ Access to key services

§ Social isolation

§ Poor integration of transport services

§ Inadequate provision of public transport and active travel

§ Access to employment

§ Impacts of tourism

§ Safety and provision for vulnerable road users

Additionally, the call for evidence outputs suggested strong support for key principles set out in the urban strategy to be incorporated into the rural strategy, with additional suggested principles that are more rural-specific such as:

§ Designing with the needs of end users in local communities

§ Reducing the overall need to travel

§ Having interventions evaluated to measure impacts in rural areas

§ Focus on delivering societal impacts and improving quality of life

§ Innovation must be fully trialled and tested in rural environments and must not take away from getting the transport basics right

§ Having a joined-up approach to maximise benefits

If taken on board, these additional objectives will provide transport and mobility options that are more tailored to rural communities. The call for evidence also notes the role of STBs and the majority view that they should encourage innovation in rural areas by sharing their knowledge and expertise and provide a platform for education and discussion. The main theme was that STBs should exhibit a leading and strategic role in rural areas and encourage innovation through funding.

PENINSULA TRANSPORT AND WESTERN GATEWAY PRIORITIES AND OBJECTIVES

PENINSULA TRANSPORT

Peninsula Transport's aim is to transform transport across the region to enable society and the economy to thrive and the unique and outstanding environment to flourish. The key challenge for the Peninsula is the strengthening of the strategic links in the region to keep up with the rest of the UK to reinforce connectivity and maximise opportunity for productivity growth. Therefore, Peninsula Transport has key three areas for consideration, as follows:

§ Resilient road and rail networks to support connectivity including access to our regional airports and ports

§ Impact of technology and innovation in supporting urban and rural mobility challenges

§ Infrastructure investment needed to unlock housing development and create accessible enterprise areas

Peninsula Transport's vision document identifies the region's goals, challenges and opportunities; provides an overview of travel and mobility statistics in the region; and summarises the strategies and studies that will be used to support the development of the full transport strategy. The vision sets out five primary goals.

§ To improve connections between people business and places, including investing in their road and rail networks to provide more people with better access to transport across the region, in turn reducing social inequalities and helping develop new homes and jobs whilst being sensitive to the environment.

§ Enhance the resilience of the transport network by providing people with better information, so they have the ability to plan their journeys more efficiently to reduce journey time and increase productivity and enhancing the resilience of the transport network will also allow the regions to be better equipped to respond to climate change and/or severe weather events.

§ Deliver affordable, zero-emissions transport for everyone by promoting active travel modes and by making a case for the improvement of public transport so it meets the needs of the users, and in a hope to reduce demand for private car use.

§ Improve the health and wellbeing of communities in the Peninsula by improving affordability, choice, safety and opportunity to more communities and more people and seeing improved public transport that's linked to more walking and cycling options across the peninsula.

§ Help the Peninsula to be a great place to live and work by supporting the delivery of new homes and jobs in places where people have travel choices and the information they need and by taking a collective, pragmatic approach to maximise access to mobility whilst protecting the characteristics of the Peninsula landscapes.

WESTERN GATEWAY

Western Gateway aims to enable clean growth and increased use of active, publicly-available and shared transport through a long-term investment programme that will provide cleaner, more reliable, well-connected and resilient transport system. This will provide a better quality of life for people living across the region, close productivity gaps and make the region more competitive whilst still respecting the natural and built environments.

Western Gateway's Strategic Transport Plan considers all modes of transport in the context of strategic travel and provides a framework for future-decision making to enable the region to become more productive, healthier, sustainable and efficient. The document breaks down Western Gateway's objectives into economic, environmental and social themes and further sets out the long-term outcomes and delivery priorities.

The objectives support a variety of social, economic and environmental long-term outcomes such as achieving net zero emissions by 2050, having an integrated passenger transport network, creating a highly resilient strategic transport network, managing the delivery of planned growth, improve access to key services and ensuring transport is not a barrier to growth and opportunity.

Economic

- § Ensure effective access of labour markets
- § Enable greater integration between employment clusters
- § Enhance business connectivity to international markets
- § Improve north-south connectivity
- § Provide a robust regional evidence base in support of the local plan-making process with an understanding of different travel markets and use of strategic travel corridors.

Environmental

- § Decarbonisation of the strategic transport network
- § Adoption of electrification and/or use of alternative fuels to enable fossil-fuel-free transport
- § Improve air quality
- § High quality digital connectivity to reduce the need for travel

Social

- § Influence the sustainable delivery of new homes and employment opportunities
- § Support multi-modal travel options within travel to work areas
- § Improve transport and digital connectivity to reduce poverty and deprivation

VISION

Understanding the policy framework, the key challenges faced by rural communities as well as potential future scenarios, and the changes that may lead to them, has enabled us to develop a vision for the future of rural mobility in the South West. This aspirational vision aims to shape the direction of policy for rural mobility in the region over the next few years. The vision provides a guide for the shaping of rural mobility planning and delivery, and presents an end state that cannot be achieved without significant cross-sectoral partnerships and investment.

"By 2040, rural mobility will have transformed physical and digital connectivity and accessibility, levelling-up our countryside and coastal communities.

Our targets for net zero will be being met through reducing the need to travel through improved digital and local services, better active, publicly-available and shared travel and the decarbonisation of transport. Our communities and economies will be stronger with better connectivity between rural places as well as with our major urban centres.

Communities will be working with public and private sectors to deliver operationally and financially sustainable commercial models which provide practical, and affordable mobility.

This transformation will be leading towards a basic universal level of accessibility for our countryside and coastal residents and visitors."

OBJECTIVES

To support the delivery of the vision, a set of objectives have been developed as follows: :

- Support the environmental, social and economic sustainability of rural communities including in the delivery of new development.
- Support the growth and diversification of the rural economy including supporting freight and logistics
- Reduce the number and length of journeys, increase the efficiency of mobility and decarbonise transport in rural areas to support net zero targets.
- Support the protection and resilience of the built and natural places in rural areas and help to deliver environmental net gain.
- Increase the digital connectivity of rural communities and the delivery of online services to eliminate disparity with urban locations.
- Increase local access within rural areas including to employment, education, healthcare, retail, services, leisure and neighbouring communities.
- Strengthen integration between rural mobility and strategic connections to support access to community and economic needs beyond local areas.
- Increase the affordability, access to and use of active modes, publicly-available and shared transport in rural areas.
- Enable partnerships between groups of settlements as well as within and between public, private and community sectors to deliver better and more operationally and financially sustainable rural mobility.

SUMMARY: STEERING THE STRATEGY

Our vision and objectives for this strategy provide a clear direction for rural mobility in the South West and have guided the identification of a comprehensive set of proposals to support the communities and economies of our countryside and coasts.

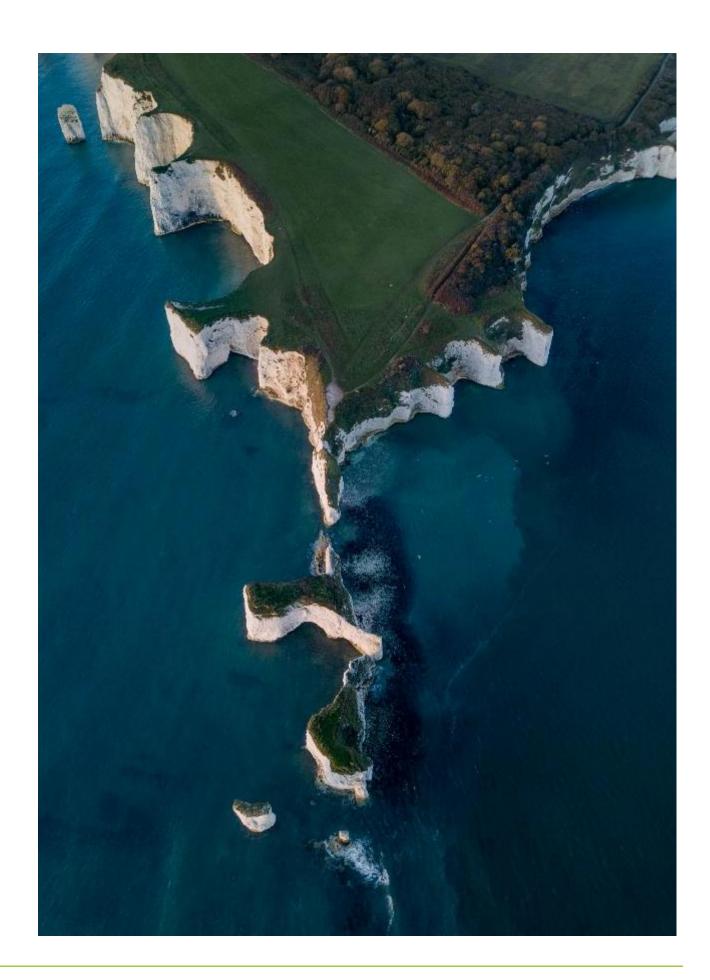### CASE STUDY: KOMBIBUS (INTERNATIONAL)

KombiBus started in 2010 as a pilot project in the rural Uckermark region, around 80km north of Berlin. Combining passenger bus services with freight and delivery of post the project reinvigorates the concept of combined passenger/freight services with the support of improved IT capabilities.

The scheme helps to generate additional revenue, which ensures the longevity of public transport provision in sparsely populated and underutilised areas.

The KombiBus project was initiated by Interlink GmbH, a traffic planning consultancy, together with several operating partners and received regional transport authority funding from central government.

Photo credit: Deutschland Land der Ideen

6

A STRATEGY FOR RURAL MOBILITY

6   A STRATEGY FOR RURAL MOBILITY

Here we set out a broader vision for the future of rural mobility in the South West. This section describes what that might look like in practice and some of the key actions necessary to set us on a path to delivering that vision.

The strategy aims to provide a comprehensive approach to improving rural mobility, setting out the delivery of new modes and services, identifying broader policy measures and a range of supporting interventions.

This is a rural mobility strategy for the South West, not simply for Peninsula Transport and Western Gateway, therefore delivery of those actions will also be reliant on a whole range of partners, stakeholders and communities to deliver.

THE FUTURE SHAPE OF RURAL MOBILITY

As this strategy has demonstrated, the rural South West has a great diversity of places and simply applying a standard approach to rural mobility across the region would be inappropriate. This would not reflect the wide-ranging challenges and changes needed.

However, as an overall approach to personal and freight mobility, we believe that the following provides a framework which can be flexed to meet the specifics of each place. We believe the future of rural mobility should be built around the following, without applying specific priorities:
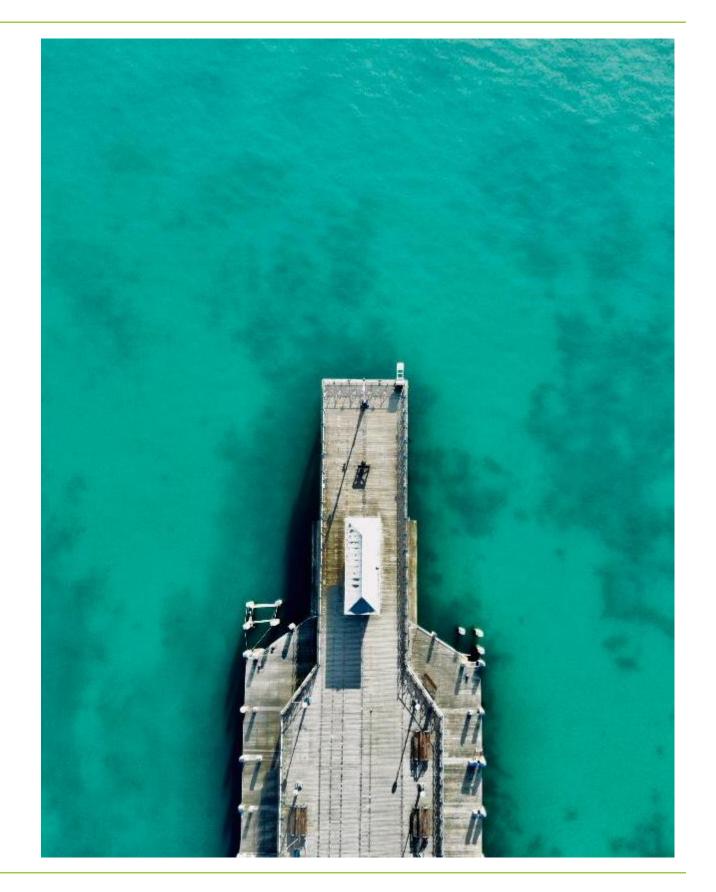
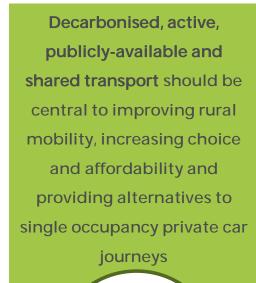Figure 18: Framework for The Delivery of Future Mobility

Rural mobility should be underpinned by **strong digital connectivity** supporting e-commerce and online services, enabling more to be done without the need to travel, if people do not wish to.
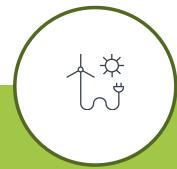
Settlements to support **more local services** where people need them to strengthen communities and economies and reduce the number and length of journeys

Integration of activity and mobility, including rural hubs, should be central to our future rural mobility system bringing together better interchange with local community and commercial activity.

Adapting the 15-minute city concept, networks of settlements should work together, sharing facilities, services and resources to form **30-minute rural communities**, supported by improved intra-rural connectivity

Decarbonised, active, publicly-available and shared transport should be central to improving rural mobility, increasing choice and affordability and providing alternatives to single occupancy private car journeys

Realistically, car and vans will remain vital to many journeys in rural areas but the **sharing and electrification of cars and vans** need to be priorities to support those without access to them and meet net zero targets.

Strengthening larger rural settlements should provide stronger drivers of socially, environmentally and economically sustainable rural development through greater investment

When needs cannot be met locally within rural areas, there should **be better strategic connections** to larger urban centres by inter-urban bus, coach and rail. These should be connected to local areas by active and shared modes.

Operationally and financially sustainable delivery should be supported through **cross-sectoral partnership and funding** across the public, private and community sectors.

Increasing resilience of mobility networks including generation and security of energy.

Figure 18 is schematic representation of the overall approach. It demonstrates networks of rural communities working together to provide a range of local services and facilities. This is supported by strong digital connectivity and provision of mobile services travelling between communities. Rural hubs are central to both the provision of local services and connectivity to the wider rural areas and beyond. They provide access to publicly-available and shared modes and are the stops for inter-urban transport including bus, coach and rail. Within the rural communities, decarbonised, active, publicly-available and shared modes (including e-bikes, e-scooters, Dynamic Demand Responsive Transport and car club vehicles) are used to move around locally, but also connect to inter-urban transport at the hubs. Each settlement also has facilities for charging electric vehicles, either at charging hubs or through peer-to-peer projects, and car and van-sharing increases the utilisation of vehicles whilst also providing alternatives where publicly-available transport does not support a particular journey.

This framework supports the 'Avoid, Shift, Improve' approach to decarbonising mobility through:

§   Avoiding or reducing the need to travel for people who can and wish to

§   Shifting to active, publicly-available and shared transport

§   Improving transport modes through decarbonising and increasing efficiency and intensity of use.

Reducing the need to travel in rural areas must be balanced with ensuring communities and individuals do not become more socially isolated from others.

RURAL MOBILITY BUNDLES

A holistic approach is fundamental to delivering improvements. Implementing individual interventions may generate some benefits but a whole system approach, with individual new interventions working together with the existing mobility network, may be more likely to support a more integrated, better-functioning rural mobility system.

This strategy therefore presents a set of bundles of rural mobility interventions, including modes, services and supporting infrastructure which can be used to develop comprehensive plans for improving mobility within specific local areas.
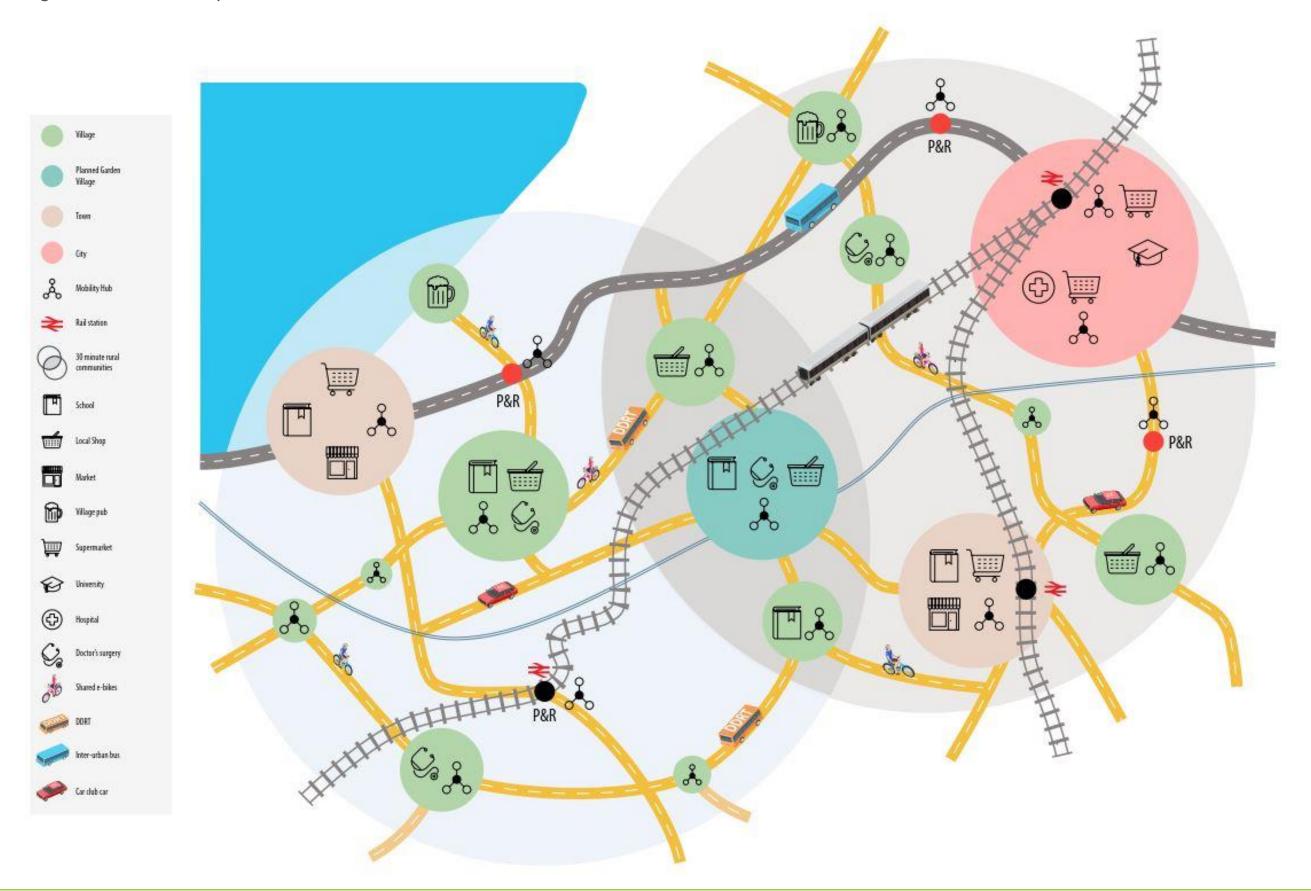
These bundles will form the basis for the development of rural mobility pilots discussed later in this strategy. As the bundles are focused on the pilots, interventions deliverable within shorter periods of time have been prioritised, being primarily service-related interventions.

Through delivering bundles of interventions it would be expected that they would integrate modes, services and infrastructure both physically and operationally to support interchange and delivery. Therefore, some infrastructure interventions have been prioritised where they provide integration and wider community/economic functions, most notably rural hubs and related interventions.

These bundles have been developed by taking the following people and place-based approach:

§   Identifying the types and distribution of people living within our priority settlement types

§   Identifying specific mobility needs (e.g. journey times, comfort, affordability, etc.)

§   Identifying potential mobility service and infrastructure options

§   Assessing how well those options support the needs of people

§   Understanding how individual options can support the overall population in each priority settlement type

§   Assessing the deliverability of options in different scales of rural place including towns, villages, hamlets and isolated dwellings.

Figure 19: Schematic Representation of Framework

This process established the options for priority settlement types which were then aggregated for different scales of rural place. As a result, 60 potential mode, service and infrastructure options have been prioritised for rural towns, villages, hamlets and isolated dwellings. The following table presents the highest priority interventions for bundles to be delivered through the pilots. The relative priority of each of the four bundles (rural town, village, hamlet and small hamlets/isolated dwelling) is indicated by the darkness of the shading, the darker the shade indicating the higher priority.

Table 3: Interventions

Intervention	Description	Typical Bundles			
		Rural Town	Village	Hamlet	Small Hamlets/ Isolated Dwellings
Inter-urban bus services	Operation of high quality frequent bus services running between urban centres with stops at interchanges for rural settlements.				
Community volunteer buses	Operation of a bus service managed by a local community group and driven by volunteer drivers.				
Community volunteer cars	Operation of a rural taxi service managed by a local community group and driven by volunteer drivers.				
Rural hubs	Development of hubs in rural areas that integrate local services, such as community and commercial functions, with mobility. These could potentially incorporate small business centres and co-working spaces.				
Ride sharing for the vulnerable	Development of a platform allowing vulnerable groups, such as school children or the elderly, to share journeys made by car in order to increase efficiency. This might include journeys to school, to medical appointments or into local centres as well as to other rural settlements				
Mobile services	Operation of mobile services to serve areas that are poorly connected to existing fixed services. Mobile services could operate from local rural hubs or community centres, and could include, be health services, banking, postal services, retail, food, library, police, etc.				

Intervention	Description	Typical Bundles			
		Rural Town	Village	Hamlet	Small Hamlets/ Isolated Dwellings
Dynamic Demand Responsive Transport (DDRT)	Operation of Dynamic Demand Responsive Transport (DDRT) services in rural areas. These are typically bus or minibus services that collect and drop-off passengers on a demand responsive door-to-door or street corner to street corner basis, with operations managed and enhanced by a 'digital back-end' to ensure efficiency.	(dark)	(dark)	(dark)	(dark)
E-cargo bikes for local deliveries	Operation of electrically assisted cargo bikes for first mile/last mile or short distance deliveries.	(dark)	(light)	(very light)	(very light)
Community volunteer deliveries	Operation of a community-run delivery service, whereby local residents and volunteers collect and deliver parcels for the community.	(dark)	(dark)	(dark)	(dark)
Ride sharing	Operation of a platform that allows rural residents to share journeys made by car to increase efficiency. This can include journeys to work (carpooling), journeys to local centres or journeys to transport hubs such as railway stations etc.	(dark)	(dark)	(dark)	(dark)
E-bike wheels for work	E-bikes available for short term loans to those struggling with access to education or employment.	(medium)	(light)	(light)	(light)
Peer-to-peer car club	Operation of a platform allowing peer-to-peer car sharing (similar to the HiyaCar model) by a resident listing their car to share, or through a group of residents jointly purchasing and sharing.	(medium)	(dark)	(dark)	(dark)
Park & Choose	Park & Ride sites for rural locations facing traffic issues with the ride element being expanded to include walking, cycling and scooting.	(light)	(very light)	(very light)	(light)
Car Club	Operation of a commercial car club.	(light)	(dark)	(dark)	(dark)
Hub & Ride	Park & Ride sites on rural inter-urban bus corridors, in which the 'park' sites are combined with commercial and community services to form a rural hub.	(light)	(light)	(light)	(light)
Secure cycle storage	Provision of secure cycle storage at destinations, including overnight cycle storage with potential storage options for cargo bikes and charging for e-bikes.	(light)	(light)	(light)	(very light)

Intervention	Description	Typical Bundles			
		Rural Town	Village	Hamlet	Small Hamlets/ Isolated Dwellings
Public service digitisation	Development and use of digital platforms to support public sector services and the use of digital-as-a-mode functions including across health, social care, education and local authority services.				
Rural-based taxi services	Taxi services operated from bases in rural locations reducing the cost for user by removing the urban to rural outward leg for taxi drivers				
Mobility-as-a-Service (MaaS)	Operation of a MaaS system to provide integrated planning, booking and payment for mobility in rural areas incorporating a range of modes publicly available and shared modes.				
Rural mobility credit scheme	Provision of mobility credits that can be exchanged for mobility services. Mobility credits are typically integrated into vehicle scrappage schemes or used to support less affluent or excluded groups part of a MaaS service.				
Ride hailing	Operation of ride hailing systems, such as Uber or Bolt, within rural areas.				
Shared powered two-wheelers	Operation of shared powered two-wheeler services (motorbike, moped, scooter).				
Quiet lanes network	Establish a network of 'quiet lanes' with reduced traffic flows and speeds to support active travel movements, particularly where purposely built active travel infrastructure is impractical.				
Local freight consolidation	Creation of spaces that accept and consolidate parcels for local communities which facilitate first mile/last mile delivery, particularly by e-cargo bike, which may include accessible central delivery lockers for collection of parcels. These centres may also support reverse logistics, such as parcel returns and refuse collections.				
Passenger on freight transport	Operation of passenger services within on freight transport systems to make use of spare capacity.				

In addition to those interventions prioritised for the pilot bundles, over 30 others were identified as potential rural mobility interventions which could have a significant role to play in the future of our countryside and coastal places. Depending on the specific locations, these could also be included in the pilots but are lower priority, based on meeting general needs and deliverability within the context of short-term pilot programmes. These further interventions include:

§ Active travel infrastructure

Whilst delivery as part of pilots would be costly and times-consuming, delaying quick learning from the pilots and significantly reducing the funding available for other interventions, infrastructure to support active travel needs to be part of the future rural mobility system. Such projects range significantly from inter-community footway and cycleway networks, and strategic walking and cycling routes, to enhanced public footpath and bridleway networks and improvement pedestrian and cycle priority on corridors and junctions.

The delivery of extensive improvements to these facilities will require significant budgets and long programmes. The space within highway boundaries for such improvements is also limited in many rural areas, therefore in many cases additional land may need to be secured.

§ Road safety improvements

Alongside improvements to active travel infrastructure, safety improvements, including to encourage more walking, wheeling, cycling and scooting, may be a priority in many areas. Traditional road safety schemes could be complemented by 20mph zones and designated low traffic neighbourhoods, villages and hamlets.

§ Tourism-related support

Tourism brings significant benefits to the South West's countryside and coasts. However, the impact of tourism on many rural areas causes significant traffic issues, particularly during peak periods, both from private cars and coaches. A range of potential interventions could be delivered but

they would need to be focused on the specific issues at particular locations. However, provision of tourist Park & Ride and shuttle buses, facilities to support coach interchange and parking, as well as event and peak season traffic management could have significant roles to play.

§ Low level air freight

As previously highlighted, the future of rural freight transport could partly be in low-level air, otherwise known as drones. These devices have been used in a number of rural and coastal areas in the UK and globally to deliver freight and significant investment from the private sector continues to be made into the development of drones. With further drone development, extensive remote rural areas, stretches of coastline, as well as offshore islands within the South West could provide further locations to trial and operate drone deliveries over the coming years.

RURAL MOBILITY POLICY

Whilst this strategy sets out a broad policy framework for the rural South West, other specific policy interventions could be considered when delivering our rural mobility vision.

§ 30-minute rural communities

The further development and application of the 30-minute rural communities concept and socially, environmentally and economically sustainable rural growth into local authority policies including local plans and local transport plans. This concept involves networks of rural settlements sharing facilities, services and resources to better support rural communities, but vitally, the concept also includes improved intra-rural connectivity to enable settlements to better serve each other. This concept also considers that access to facilities and services may not only be through fixed physical locations but also via mobile services (e.g. retail, banking, libraries, etc.) and digital provision. Whilst not every 30-minute rural community may provide for every community need and potentially not

strictly within 30-minute travel times by non-single occupancy car modes, the application of the concept in general could help provide a step changing in rural accessibility.

§ Rural proofing of local authority mobility policy

Applying rural-proofing approaches to public sector policy, particularly across local authority departments, and to ensure rural mobility is recognised as a major issue in emerging Local Transport Plans (LTP). This is more than applying checks to ensure that urban-focused policies do not cause harm to their rural counterparts; it is ensuring that rural is fully considered in all policy development.

LTPs should not only recognise the mobility challenges within rural areas and between rural and urban areas, but should also seek to work across local and national boundaries on rural issues.

This approach could also include incorporating rural into Bus Service Improvement Plans, specific Local Cycling and Walking Infrastructure Plans and LTP daughter documents being developed which focus on specific rural challenges and solutions.

§ Investment in our market towns as centres of rural services and employment growth

Reinvigorating our market towns in their traditional role of being key rural service centres and putting them at the heart of 30-minute rural communities. These centres could not only grow in their traditional role but also act as the focus for investment in new employment opportunities, including higher paid positions. Focused on local strengths and differentiation, targeting specific markets relevant countryside and coastal locations, these towns could be at the centre of rural economic diversification. Expanded tourism offers, added value food production, the green economy, decarbonised energy generation and artisanal production could all provide distinct opportunities to broaden the economies of these rural towns.

PLACE CASE STUDY

- § Name: Mere
- § Unitary Authority: Wiltshire
- § Place type: Rural town
- § Population: 2,865
- § Population density: 2,109 per km^2
- § Average household income: £26,228
- § Proportion in full-time employment: 29%
- § Top 5 industries: Wholesale, retail and trade; human health and social work activities; manufacturing; education; construction
- § Proportion without qualifications: 41%
- § Average property value: £219,503
- § Average journey time by public transport
  - · To food stores: 7 minutes
  - · To secondary schools: 39 minutes
  - · To large employment sites: 29 minutes
- § Average download speed: 23 Mbps

§ Making rural development socially, environmentally and economically sustainable

Planning authorities should work with housing developers to ensure that development proposals support sustainable communities, economies and mobility. They should work to reduce car dominance by providing active and public-available alternatives and support the provision of local services. Wherever possible, authorities should look to secure infrastructure early in the delivery of the development to ensure positive travel behaviours are encouraged from the start.

Such development should also be used to support and fund contributions to wider mobility services in rural areas.

§ Minimum standard of community services

Introducing into local plans a minimum standard of services expected to be available in different scales of rural community and working with local communities to deliver them, supported by wider 30-minute networks of settlements. This should be supported by removing a hierarchical approach to settlements that restricts growth and infrastructure in settlements that fall below an arbitrary threshold of service provision.

§ Supporting rural neighbourhood plan-making and delivery

Working with local communities to develop neighbourhood and village plans as a basis for wider community-led involvement in the delivery of local services.

§ Working towards a policy providing universal basic accessibility

A longer term policy aim will be to develop pan-South West universal basic accessibility for rural areas. This would set out the minimum level of access communities should have to a range of services but there could be flexibility in how those services are delivered. This could cover publicly-available and shared transport as well as supporting needs such as access to employment, education, health care and local shops. These needs could be supported through various means including digital and mobile services as well as improving transport links. This approach to future planning would ensure no community, however remote, would be left behind and the ability to meet day to day needs would be given priority in future growth scenarios.

SUPPORTING INTERVENTIONS

In addition to policy interventions and the bundles, further options could also support the achievement of the vision and objectives.

§ Behaviour change

Local authorities could work with communities and local businesses, including those within the tourism industry, to develop programmes of personalised travel planning and travel plans in rural areas. This could include working travel planning into neighbourhood and villages plans.

§ Better use of railways including line and station reopening

Due to the timescales, cost and complexity of delivery, the potential pilot bundles have excluded rail projects. However, improving existing railway services and stations, as well as reinstating former lines and stations, could have a key role to play in the future of rural mobility, particularly for more strategic movements. There are a number of lines serving rural stations which present opportunities for improved levels of service, increasing connectivity and accessibility to wider rural areas and beyond, as well as providing better facilities for passengers such as mobility hubs at stations and better storage of bikes on trains.

The South West is already seeing success in delivering new services, including the recently reopened Dartmoor Line between Okehampton and Exeter, and further plans include new stations such as Wellington and Cullompton. There are opportunities to reuse former track alignments with light rail, very light rail and the use of automated shuttles all being alternatives to the reinstatement of heavy rail.

In addition, former alignments may present opportunities for improving connectivity for active modes, cycling, scooting and walking. The emergence of e-bikes may enable such routes to offer more opportunities for strategic movement between rural and urban areas.

§ Electrification of publicly-available and shared modes

Whilst the bundles include for electric vehicle charging hubs and peer-to-peer EV charging to support decarbonisation of privately owned vehicles, publicly-available and shared transport modes also need to be electrified in rural areas. The modes range from local and inter-urban bus, rail, taxi, car club and even estuarial ferries.

§ Freight on passenger transport

Consideration should also be given to new ways to transport freight in rural areas, including, alongside measures in the bundles, the development of passenger transport using underused freight capacity. This approach could range from the local bus network to using passenger rail services, potentially supported by local freight consolidation hubs and decarbonised first mile/last mile deliveries.

AUTOMATION

Automation may have a key role to play in the future mobility of rural areas. Automated modes are already starting to appear within our countryside and coastal areas with John Deere bringing an autonomous tractor to market in 2021, the Royal Mail carrying out drone trials to the Isles of Scilly and ongoing developments in automated shipping.

However, these developments need to focus on the outcomes for our communities and economies rather than simply delivering new technologies.

§ Operating cost

The automation of mobility reduces the need for human involvement in operation of vehicles and fully autonomous vehicles will remove the driver altogether. As a major constraint on rural mobility operations, reducing or eliminating driver costs may support increased provision and financial sustainability of passenger services.

CASE STUDY: THE DARTMOOR LINE (DEVON)

The Dartmoor Line is the first branch line reopened under the government's 'Restoring Your Railway' initiative. The line to Okehampton originally opened in 1871 as part of a series of extension from Exeter into northwest Devon, but services were withdrawn in 1972 as a result of the Beeching Report.

Local residents long campaigned for the return of a regular year round service between Okehampton and Exeter, forming the OkeRail Forum in 2014 as an initiative of the County Council.

The service was reinstated in November 2021, branded at the Dartmoor Line, which operates trains every two hours each way, seven days a week, between Okehampton, Crediton and Exeter St Davids, including services for daily commuters.

Photo credit: The Dartmoor Line

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§ Plugging gaps in networks

Automated or autonomous shuttles may be able to provide links in the mobility network that are currently missing due to a lack of financial sustainability. These could be within the existing highway, on segregated routes or using former railway lines through rural areas.

§ Improving safety

Automation of safety systems could significantly reduce accidents on rural roads, where they are relatively more frequent, whilst also removing people and risk from air freight transport, through drone operations, and some maintenance activities.

§ Focusing on the customer

The reduced or removed role of drivers may enable human resources to be refocused on customer experience, including supporting vulnerable users.

§ New solutions

The development of new autonomous modes may also provide opportunities to improve rural mobility. For example, delivery robots are already operating in some UK towns and, with further developments in technologies and regulations, these could provide alternatives for last mile delivery of good in rural areas.

MOBILITY'S DEPENDENCIES

To support wider improvements, the dependencies of rural mobility also need further development in terms of energy and digital connectivity.

§ Electricity generation and distribution

The decarbonisation of mobility will be heavily reliant on green electricity generation and its distribution in rural areas. The capacity of rural networks to support this needs to be understood, and upgraded where necessary. There is also potential for greater delivery of zero emission electricity through local community energy generation. Surplus revenues from community projects could help to fund locally delivered mobility services, as well as supporting their decarbonisation.

§ Digital communications enhancements

As detailed earlier in this strategy, rural digital connectivity continues to lag behind urban areas and this continues to be a drag on local businesses and communities. The Government has put in place plans to support the roll-out of superfast broadband in the most hard-to-reach locations, but many areas with insufficient speeds and bandwidth still remain.

ENGAGING WITH RURAL COMMUNITIES AND ECONOMIES

A high level communications plan has been developed as part of the supporting technical documents, but a range of other engagement and partnership activities could also be undertaken.

§ Cross-boundary partnerships

As indicated earlier, rural areas span across local authority boundaries and, for many communities, their nearest larger centre is in the next district or county. Therefore, rural local authorities should consider working with their neighbouring authorities, either rural or urban, to bring more integration to rural mobility planning, operation and funding.

§ Cross-sectoral public sector working

The challenges for rural areas most in need of support are not purely mobility related but mobility can support a range of wider objectives. Therefore cross-sectoral working across the public sector to deliver better mobility may bring greater focus on wider rural issues, improved integration and widened funding opportunities.

§ Rural mobility champions in local authorities and rural communities

Increasing the prominence of rural mobility could be supported by appointing champions within local authorities, parishes, and rural communities.

§ Community capability and capacity enhancement

Community investment will need to be made to support the capacity and capability of communities to deliver improved mobility. Whilst many communities may already be delivering similar projects in other sectors or have the capability to, many others may not. Therefore, training and support will be necessary if they are to take on some elements of community delivery.

§ Best practice guidance

The development of best practice guidance for rural mobility policy and delivery may help local authorities and communities to learn from successful projects elsewhere.

SUMMARY: PILOTING NEW APPROACHES TO RURAL MOBILITY

The section has set out a wide range of proposals to support the delivery of improved mobility in rural areas. However, many options have yet to be sustainably delivered in a range of rural areas, particularly not as integrated bundles.
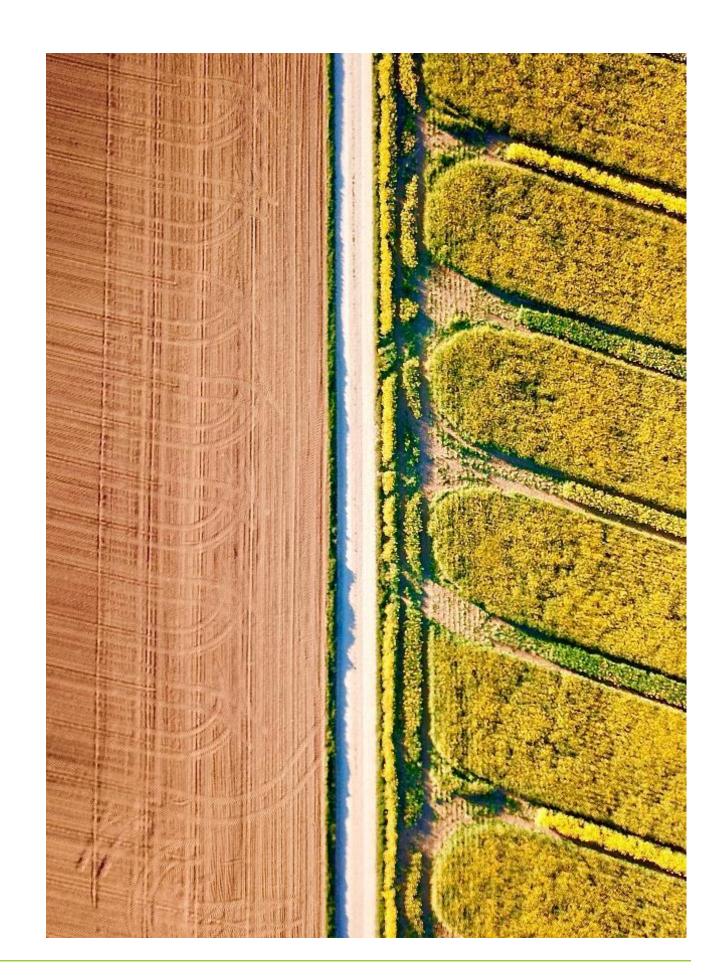
The next section of this strategy proposes that a number of pilots are undertaken to test this bundled approach, to assess sustainable new approaches to operational and financial long-term viability.

CASE STUDY: E-BIKE TRIAL FOR DOCTORS (DEVON)

NHS doctors have are leaving their cars at home in favour of using e-bikes for home visits and travel between practices in an electric bike trial funded through Devon County Council and the Department for Transport.

GPs from Pinhoe and Broadclyst Medical Practice are using Co Bikes' electric cycles as a carbon- neutral way to travel between practices and for home visits. Not only does the trial support low-carbon alternatives in NHS operations, but also serves as a conversation point with patients and helps to encourage similar activity to promote good mental and physical health.

Photo credit: Co Bikes

7

DELIVERING THE FUTURE OF RURAL MOBILITY

7   DELIVERING THE FUTURE OF RURAL MOBILITY

With new approaches to mobility usually being tested and delivered first in major urban areas, they often remain untried for longer in our rural places. This strategy therefore proposes a number of pilots to be run in the South West to trial a range of different integrated bundles of projects within rural areas.

RURAL MOBILITY PILOTS

The overall concept for the pilots focuses on delivering trials of bundled projects in different types of rural place, within either individual or groups of settlements, led by different sectors, within or across rural local authority boundaries. By operating a varied set of pilots, we believe that there are more opportunities to learn and to develop operationally and financially sustainable models for long term delivery of mobility in rural areas.

A shortlist of potential pilots has been considered taking account of the following variations that could be applied:

§   Place type

The overall focus for the strategy has been on levelling-up and therefore focusing on those places most in need of support, namely those with less affluent communities and poorer levels of accessibility to everyday services. These may be some of the most challenging places to support and improve rural mobility, but it is vital that we find operationally and financially sustainable models to deliver mobility in these areas otherwise they will continue to be left behind.

§   Single or groups of settlements

Consideration has been given to whether pilots operate in single settlements or cover networks of settlements to replicate the 30-minute rural community approach.

§   Local authority boundaries

With rural journeys often being across local authority boundaries, the pilots will consider trials within a single boundary, across the boundaries of two rural authorities, or across boundaries of a rural authority and an urban authority.

§   Delivery lead sector

Consideration has been given to whether different business models present differing opportunities to secure long term operationally and financially sustainable approaches to rural mobility. Opportunities may differ between:

·   A local authority led approach based on public sector funding

·   A commercial approach using private finance

·   A community-led approach using volunteers alongside community and charitable funding

Whilst having a specific lead sector, pilots would also be expected to operate in partnerships either within or across sectors and there may be a combination of public, private and community involvement in individual pilots.

Using the combinations of the different variations that could be applied, a shortlist of potential pilots has been drawn up. Of the potential pilots, six have been selected by the strategy leadership team for further consideration and high-level business cases have been developed which are presented in the accompanying technical document. The six were chosen on the basis that, together, they provide a broad range of different structures within which to pilot rural mobility interventions. They test a range of types of leadership and, importantly, also test how well local authority areas can work individually or together to deliver rural mobility. The pilots range in scale, from a small

community-led pilot in a single settlement to a much wider pilot covering both rural and urban local authorities.

CASE STUDY: MINIMUM STANDARDS OF PUBLIC TRANSPORT PROVISION (INTERNATIONAL)

Several municipalities are taking varied approaches to legislating for minimum standards of public transport access. In the Zurich canton, the minimum public transport standards are defined by services frequency:

- § Villages of 300 people or more are entitled to at least an hourly bus service linking them to regional facilities for employment, education, training, shopping and leisure.
- § On routes where multiple communities create stronger demand, the buses run at least every half an hour.
- § In towns, bus services run four times an hour, operating 7 days a week from 6am to midnight.

The shortlisted pilots include:

- § Community-led pilot for a single settlement.
- § Local authority-led pilot for a network of settlements within a single local authority boundary.
- § Community sector-led pilot for a network of settlements within a single local authority boundary.
- § Private sector-led pilot for a network of settlements within a single local authority boundary.
- § Local authority-led pilot for a network of settlements across the boundaries of two rural authorities.
- § Local authority-led pilot for a network of settlements across the boundaries of two authorities, one rural and one urban.

Each pilot will develop its own unique set of proposals, based on the bundles identified by the strategy but also, vitally, taking into account the existing services, infrastructure and partnerships currently operating in their respective areas.

However, using community-led pilot within a small rural town and surrounding area as an example a typical bundle of interventions for a pilot could be as follows:

- § A community volunteer bus, car or taxi service and delivery service
- § A network of rural hubs
- § An EV changing hub and peer-to-peer EV charging
- § Mobile service delivery (e.g. banking, retail, food, etc.)
- § E-bike, e-cargo bike and e-scooter sharing and wheels-to-work
- § Car club
- § Local freight consolidation and parcel lockers
- § Ride sharing, including for vulnerable groups

This bundle could be supported by existing inter-urban bus, coach and rail services for strategic movements, with connections locally by the modes set out above.

Crucially, the pilots will test whether there are operationally and financially sustainable models for the different bundles of rural mobility proposals under different delivery leads. This will require sufficient time in operational trials to assess that sustainability. Therefore, the pilots themselves should operate in a 'steady state' for at least 12 months but preferably more. However, monitoring and evaluation of the pilots should be undertaken both in the development stages and once operational, with the findings disseminated as they are generated. This will enable learning from the pilots to be available continuously rather than waiting until the end of the pilot period.

ROLES AND RESPONSIBILITIES

The delivery of this strategy and the pilot studies will be reliant on not only Peninsula Transport and Western Gateway but a significant range of public, private and community sector organisations. The STBs cannot deliver this strategy alone; it is a strategy for the whole of the South West, both in terms of geography and the organisations with responsibilities for and stakes in the delivery of mobility in rural areas.

Broadly, the roles in delivering the strategy fall to STBs, partners, stakeholders and communities:

Figure 20: Those With Roles For Delivering The Strategy

STBS

Peninsula Transport and Western Gateway have taken a lead in rural mobility in the South West by developing this strategy. However, our responsibilities will continue beyond this and may include:

§ Engaging with central government departments and other STBs on rural mobility matters including funding and sharing learning and best practice.

§ Working with and advising South West local authorities to embed rural-thinking into mobility policy and provide guidance, co-ordination and, potentially, funding.

§ Engaging with partners, stakeholders and communities to support the delivery of rural mobility.

§ Leading the development and delivery of individual proposals contained within this strategy including further policy development, leading engagement and partnering organisations delivering supporting interventions.

§ Leading the development and funding of the rural mobility pilots.

§ Co-ordinating and prioritising funding bids within national competitive funding processes.

§ Monitoring and evaluating the delivery of the rural mobility strategy.

PARTNERS AND STAKEHOLDERS

The range of partners and stakeholders involved in rural mobility is considerable and different combinations of each will be required to deliver individual proposals contained within this strategy. The strategy identifies partners as organisations with a direct role in delivery (e.g. development, operation or funding) while stakeholders are organisations or individuals with an interest or concern in rural mobility who need to be engaged but do not have an active role in delivery.

The partners and stakeholders for this strategy include, but are not limited to:

§ Central government departments including DfT, DEFRA, DLUHC, BEIS

§ Local authorities including combined authorities, unitary, shire county, district, parish and town councils

§ Local enterprise partnerships (LEPs)

§ National parks and Areas of Outstanding Natural Beauty

§ Other public sector organisations including those from the health, education and environment sectors

§ Mobility user groups such as Transport Focus, disability groups, cycling groups, etc.

§ Transport infrastructure and service providers such as Network Rail, National Highways, airports, ports, train, bus and ferry operators, regional airlines, logistics operators, micro-mobility operators, third sector organisations, EV charging operators, etc.

§ Industry and trade organisations e.g. National Farmers Union, Tourism Industry Council, etc.

§ Utility companies including electricity and communications.

§ Major landowners, developers and property portfolio holders

§ Specialist interest groups e.g. Campaign to Protect Rural England, Sustains, etc.

§ Community organisations e.g. Women's Institute, cycling/walking groups, church networks, social enterprise networks, community companies and trusts, social media groups.

The roles that these partners will play in delivering the strategy will vary significantly depending on their general role but also on individual proposals in this strategy. However, the following are typical roles they may play:

§ Development: building on previous learning from pilots, undertaking research, feasibility studies, initial design, business case development, piloting, testing, evaluating and learning;

§ Funding: Providing funding for delivery or enabling or securing funding for others;

§ Commissioning: leading the policy framework, specification and procurement of rural mobility proposals;

§ Delivery: taking concepts through to the first day of operation of new rural mobility services and infrastructure;

§ Operation: The management of day-to-day delivery of infrastructure and services including mobility, digital communications and energy;

§ Monitoring, evaluation and review: the undertaking of monitoring of rural mobility, evaluating its operation and reviewing rural mobility strategy.

PLACE CASE STUDY

- § Name: Totnes
- § District: South Hams
- § County: Devon
- § Place type: Rural town
- § Population: 7,902
- § Population density: 2,984 per km^2
- § Average household income: £32,524
- § Proportion in full-time employment: 44%
- § Top 5 industries: Wholesale, retail and trade; human health and social work activities; education; manufacturing; construction.
- § Proportion without qualifications: 21%
- § Average property value: £236,563
- § Average journey time by public transport:
  - · To food stores: 7 minutes
  - · To secondary schools: 16 minutes
  - · To large employment sites: 17 minutes
- § Average download speed: 38 Mbps

COMMUNITIES

As well as more established public and private sector partners and stakeholders, this strategy looks to communities within rural areas as being part of the solution to delivering improved rural mobility and making it more operationally and financially sustainable in the long term. Whilst communities are often seen as stakeholders in the development and delivery of mobility, there may be opportunities to build on existing structures and best practice from elsewhere to bring communities into the centre of mobility delivery.

Across the South West, as elsewhere, there is a large number of community sector organisations delivering local services, including mobility. With the right support, funding and guidance, existing and new community organisations may be able to take the lead in delivering mobility alongside other local services, meeting specific local needs and increasing community cohesion and resilience. A key aim of some of the pilots will be to build on experience from within the South West and elsewhere to test the long term benefits and sustainability of community-led mobility.

DELIVERY MODELS AND FUNDING

The key challenge for rural mobility is to make it financially and commercially sustainable regardless of who it is operated by, whether by the public sector, private sector, or communities. However, funding and the models through which mobility is delivered are interlinked and so need to be considered together.

DELIVERY MODELS

A delivery model, also known as commercial or business model, is an organisation's core strategy for a sustainable financial operation. For a business, this relates to how it makes a profit but for other organisations it can focus on the way its resources are best deployed to support its outcomes.

Within rural mobility, there are a number of well-established delivery models for the operation of transport services. However, new models continue to emerge, often from urban settings, providing alternative approaches which could be applicable to the rural context. Overall, there is a significant range of models, some which have wider applicability while others may be very specific to certain aspects of mobility. Here we set out some of those which have a potential wider application in rural mobility, including:

- § Advertising

  Advertising can be used to generate revenue to support operations and provide infrastructure such as bus shelters.

- § Brokerage

A broker connects customers with a range of suppliers enabling them to find the most appropriate product, with the broker receiving a fee. This approach could be used to broker the use of fixed and moving assets in rural communities, such as rental of mini-buses belonging to different organisations or a wider range of services within a Mobility-as-a-Service application.

§ Collectives and consortia

Groups of organisations coming together to leverage their combined resources. This approach, across public, private and community sectors, could be used to deliver rural hubs, for example.

§ Direct public sector

Taxation-funded government organisations providing services across a range of sectors. These could typically include in-house local authority mini-bus fleets for social care transport but, increasingly, much of local authority transport is procured.

§ Fractionalisation

Customers buy part of a product or for a period of time. This approach is increasingly being used for mobility, including in car ownership, but could be applied to other modes such as e-bikes or e-scooters.

§ Franchise

Selling the strategy for running and operating a business or service to another party. Typically, this has been used by the public sector to procure the private sector operation of bus and rail services but could be applied to other operations such as rural hubs.

§ Marketplace

A company provides a marketplace for users to sell goods and services. There is potential for Mobility-as-a-Service to provide marketplaces through which operators sell their services and consumers find the best deal to meet their needs.

§ Social enterprise

Not for profit organisations set up by local communities to support improvements through operating facilities and services. These can operate with both paid and volunteer staff. Such organisations can include, amongst others, Charitable Incorporated Organisations (CIO), Community Benefit Societies, Community Interest Company (CiC), Community Land Trusts and Community Energy Companies. A wide range of such organisations already existing including within mobility, and those in other sectors, could provide platforms upon which to build a mobility offer. The Bob the Bus service in Totnes case study provides an example of this.
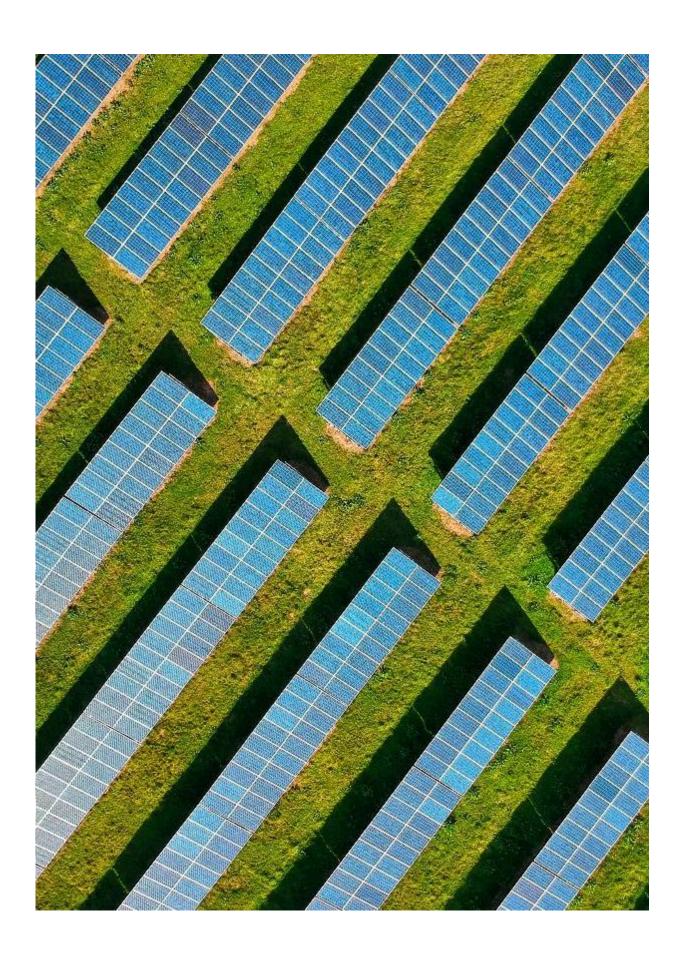
§ Peer-to-peer

Consumers share products with other consumers, often facilitated by a digital platform. This approach is being used to operate car clubs, car share and bike share operations, both widely or within limited 'closed loop' groups (e.g. within specific residential developments, streets or neighbourhoods). The peer-to-peer EV charging system, Co Charger, based in Exeter, provides an example, and is a case study in this report.

§ Reverse auction

Sellers offer their lowest prices through an auction. This has typically been used for local authority procurement, but could also be used through marketplaces directly to consumers for mobility services where there is competition.

§ Volunteer

The use of volunteers to operate a business or function to reduce human resource costs. This approach is used by many charities and community-led organisations, including for community bus, car and freight services.

In addition, there are a range of other models which could meet the needs of specific elements of mobility and funding such as affinity clubs, data-into-assets, digital platforms, on-demand, pay-as-you-go, product-as-a-service and virtual goods. These tend to be applied to newer forms of mobility service such as DDRT, car clubs, Mobility-as-a-Service and mobility credits.

Despite there being a range of delivery models open to rural mobility, the proposal to provide comprehensive bundles of interventions is likely to mean that mixed models of delivery will be required. The established approach to mobility delivery is very much a mixed model, however, it fails to deliver the levels of mobility needed by our rural communities and economies. Therefore a different combination of public, private and community sector delivery is needed, working to the strengths of each and for the benefit of all.

FUNDING

There must be ways to fund rural mobility by using not only existing funding, but by finding new sources too. We must look to a broader range of funding opportunities if we are to make rural mobility financially sustainable, harnessing not only traditional transport-related channels but also cross-sectoral sources across the public sector and beyond.

A key purpose of the proposed pilots is to find new ways to operate rural mobility in a long-term financially sustainable way. There are a range of funding sources open to rural mobility, however, the pilots present an opportunity to test them in the real world in order to find out which could provide long-term stability for operating transport in rural areas.

Both Peninsula Transport and Western Gateway are looking to transition budgets from strategy development to project delivery, with applications for central government funding likely to include specific elements to support rural mobility and the proposed pilots. However, wider funding will be needed to meet the vision this strategy sets out, with the wider public sector, led by the LEPs, the city region and local authorities, working with the STBs to secure more funds.

CASE STUDY: SHARED E-BIKES AT CRANBROOK AND HONITON RAILWAY STATIONS (DEVON)

South Western Railway has installed 20 e-bikes at Cranbrook Station and a further 10 e-bikes at Honiton Station in Devon.

The e-bikes have been supplied by Co-Bikes, in partnership with South West Railway, Co Bikes, the Department for Transport, East Devon District Council, and the Exeter and East Devon Enterprise Zone.

The e-bikes are expected to improve access to rail in the growing employment area to the east of Exeter, as well as providing opportunities for leisure cycling in the surrounding countryside.

Photo Credit: South Western Railway

From the national level, there are a variety of funding streams available to local authorities in rural areas, particularly from the Department for Transport (DfT), Department for Levelling Up, Housing and Communities (DLUHC), Department for Digital, Culture, Media and Sport (DDCMS) and Department for Environment, Food and Rural Affairs (DEFRA). Whilst some of these sources are established and well used for mobility already, others are new or periodic, depending on contemporary policy drivers. Primary examples of recent new funding opportunities applicable to local authorities that could be applied to rural mobility include:

§ Rural Services Delivery Grant

§ Rural Mobility Fund

§ Zero Emission Bus Regional areas scheme (ZEBRA)

§ Funding to follow Bus Service Improvement Plan

§ E-Cargo Bike Grant Fund

§ Levelling Up Fund

§ UK Community Renewal Fund

§ Shared Rural Network

§ Project Gigabit

§ Restoring Your Railways Fund

§ Local Cycling and Walking Infrastructure Plan funding

At a strategic level, funding for larger schemes may come from Network Rail (in due course Great British Railways), National Highways or the National Roads Fund.

In addition, local authorities have other funding which could be applied to rural mobility, including but not limited to:

§ Integrated Transport Block

§ Clean Air Zone, congestion charging and Workplace Parking Levy receipts

§ Community Infrastructure Levy and Section 106 contributions

§ Income from assets such as car parks, roads and property

§ Council Tax and Business Rates

§ Fare income from mobility services

§ Plus a range of financing approaches

However, away from typical transport sources of funding, local authorities should look cross sectorally across their departments to identify where objectives can be mutually supported by sharing funding.

As part of this strategy, we believe consideration could also be given to cross-boundary funding with local authorities working together to share funding, potentially including with neighbouring urban authorities. This and other specific approaches that could be investigated include:

§ Reverse-flow funding

Where urban local authorities provide some funding to neighbouring rural authorities on the basis of income they receive from rural residents. For example, it is conceivable that workplace parking levy revenue in an urban area could be shared with a neighbouring rural area on the basis of rural residents using the parking spaces. Similar approaches could also be used for revenues from congestion charging and Clean Air Zones.
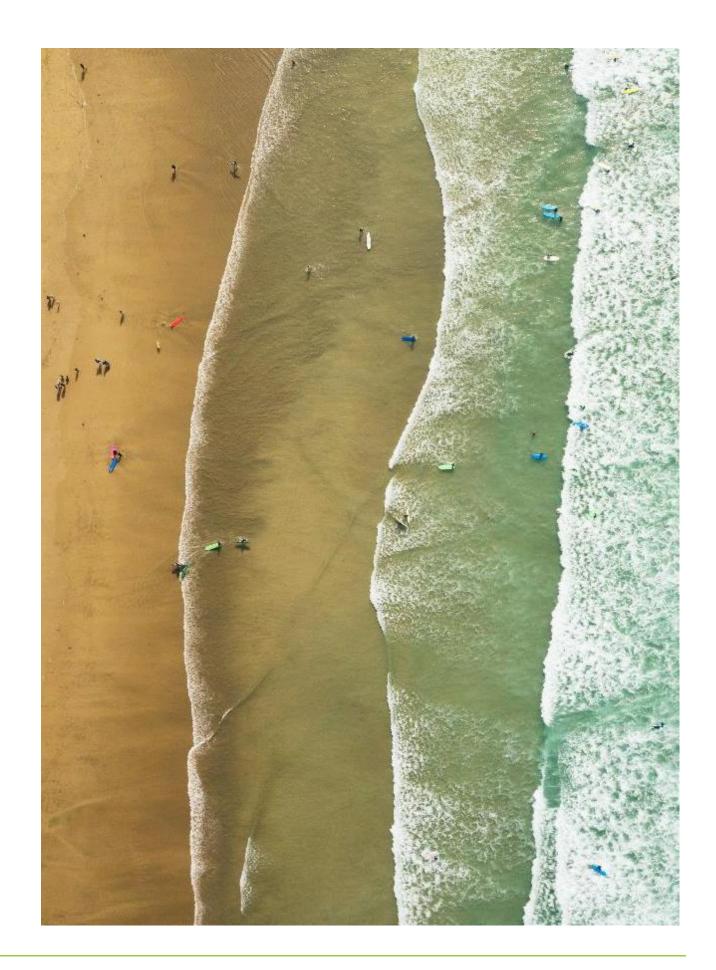
§ Cross subsidisation

There may be potential for surplus revenues from the operation of urban transport services to support those that make a loss in rural areas. For example profit-making urban or inter-urban bus services could support rural Dynamic Demand Responsive Bus services. However, with many profitable services being operated commercially rather than through local authorities, opportunities for this may be limited in many rural areas. However, rural bus partnerships may provide an opportunity to investigate such opportunities.

§ Rural funding top-up

Where funding for mobility in rural areas is increased above the per capita average to take account of the higher operational and user costs in rural areas.

§ Rural specific Levies

Where income is raised from the management of rural issues, such as the impact of tourism-related transport or second homes (e.g. the Welsh Government is proposing an increased levy on second homes).

§ Ring fencing developer funding

Where income from developer's Section 106 and Community Infrastructure Levy is assigned specifically to rural mobility and levies are higher in rural areas. However, there is a problem with viability for developments where additional costs are placed on developers and viability in general may be lower in some rural areas. Where contributions are made by developers, there are a number of potential calls on that funding in addition to mobility, therefore, monies available to improve local walking and cycling routes or public transport services may be very limited.

There are also issues with time-limited funding from developments for transport services failing to result in financially sustainable services (local bus services for example) and the service provision being removed once the funding ends. One solution could be securing an index-linked annual contribution from the new households to support the longer term operation of services.

§ Road user charging

The emergence of Electric Vehicles has raised the issue of reducing Government revenues from fuel duty. There is significant discussion that the solution to this challenge may be the development of road user charging. The impact of fuel duty on rural residents is significant due to the longer distances they have to travel and the potential for road user charging may present opportunities to rebalance the costs to locations and times where the impact traffic is most significant.

Revenues from road user charging may also provide an opportunity to ring-fence funding for rural mobility from revenues generated in rural areas.

At a community level, there is also a wide range of funding opportunities that could support community groups taking a lead in some aspects of mobility, including the recent central government UK Community Ownership Fund and

Rural Community Energy Fund. T In addition to income from running services, other funding sources include:

§ Local authorities

§ National Lottery Funds

§ FCC Community Action Fund

§ Landfill Communities Fund – SUEZ Communities Trust

§ Charities (e.g. Comic Relief, Morrison's Foundation, Foyle Foundation)

§ Income from communities e.g. from donations or shares in community owned companies

§ Income from operating services

§ Surplus income from community energy generation

MAKING THE CASE FOR RURAL FUNDING

Whilst the case for investment in rural mobility is clear, making that case through traditional channels can be difficult. In attracting funding for major investments in mobility and transport, local authorities are effectively in competition for finite pots of funding from central government. Local authorities bid for funding through an established system, based on taking a project through three stages of business case supported by a complex set of appraisals. Whilst the approach to securing funding through this system is evolving it may not, as yet, reflect the specific conditions in our countryside and coastal areas.

The established appraisal mechanisms, based on monetised benefits of transport improvements, favour those places that are busier, have more traffic, higher productivity and higher incomes. They also benefit locations where congestion is a significant issue, where the economic impact of schemes could be relatively higher. These types of place tend to be more urban or on strategic corridors, rather than rural. Where congestion in rural areas is a problem, there can be the complicating factor of seasonality. For example, traditional peak hours, which appraisal tends to focus on, may not be a significant problem in some tourist

areas but in peak season congestion can be a considerable problem throughout the day, particularly on Fridays, at weekends and on Bank Holidays.

Approaches to business cases and appraisal are changing and the strategic context is now given greater weight in decision-making, potentially giving more support to rural issues. However, as shown in this strategy, many of the potential solutions to rural mobility are non-traditional and more needs to be done to find ways to robustly appraise the benefits of new approaches to mobility. Even some newer measures of benefits, such as land value uplift, may steer investment towards urban areas, where land values are already higher.

Therefore we believe it is essential that specific routes to funding are provided for rural areas and that they are supported by ring-fenced budgets for rural mobility. The anticipated Department for Transport Future of Transport: Rural Strategy provides an excellent opportunity to facilitate this.

MONITORING AND EVALUATION

This is the first rural strategy being developed at sub-national level in England, with its delivery having the potential to inform rural policy across the country.

A robust monitoring and evaluation framework will be key to ensuring that we use activity resulting from this strategy to continue to shape, develop and improve rural mobility and to share any learning widely.

Our proposed monitoring and evaluation framework is described in more detail in the supporting technical document but is also summarised below.

The framework has two distinct elements:

§ Strategy: the tracking of the delivery of the strategy and its resulting impacts

§ Pilot: a framework for tracking the development, delivery and performance of the proposed pilots.

PLACE CASE STUDY

§ Name: Bude

§ Unitary Authority: Cornwall

§ Place type: Remote coastal town

§ Population: 5,606

§ Population density: 2,912 per km^2

§ Average household income: £27,448

§ Proportion in full-time employment: 43%

§ Top 5 industries: Wholesale, retail and trade; human health and social work activities; manufacturing; education; professional; construction.

§ Proportion without qualifications: 27%

§ Average property value: £186,424

§ Average journey time by public transport

· To food stores: 7 minutes

· To secondary schools: 11 minutes

· To large employment sites: 74 minutes

§ Average download speed: 34 Mbps

STRATEGY MONITORING AND EVALUATION

The overall aims of monitoring and evaluating the strategy will be to:

§ Provide an up-to-date understanding of the issues surrounding rural mobility

§ Understand the impact of the strategy

§ Feed into both the update of the strategy and wider rural policy development and delivery

This process will not only focus on the delivery of the strategy but also on the wider development of rural mobility and related changes and challenges. For the purposes of the strategy, the monitoring and evaluation activity is sub-divided under the following headings as distinct packages of activity:

§ Key changes

The signals, trends and trajectories affecting rural mobility will be monitored to track their development and their level of impact. The evaluation of these key changes will support ongoing development of rural mobility thinking and policy.

§ Policy development

The ongoing development of rural-specific policy will be monitored alongside wider policy which could affect rural areas, including mobility. This will include policy at local, other sub-national and national levels.

§ Wider rural mobility development

This package would monitor the wider development of rural mobility across within the South West, outside of the strategy proposals, as well in England, the wider UK and abroad. This would monitor rural mobility best practice to enable the further development of the strategy with the latest set of potential interventions.

§ Intervention delivery

Central to the monitoring and evaluation of the strategy will be the delivery of each proposal it contains. Each proposal will be regularly monitored to track progress in terms of the actions taken, partners involved, funding secured, approach to delivery, impact on strategy vision and objectives and any resulting learning. Information would be collated through the development of dashboards for each proposal.

§ Strategy evaluation

Monitoring will enable the progress in delivery of the overall strategy to be evaluated. All the information, including the intervention dashboards, will be collated to assess:

· the progress in delivering the strategy

· the extent to which the vision and objectives are being met

· Whether the strategy remains up to date in the context of wider changes and policy development

§ Reporting and engagement

Reporting progress of the strategy and wider developments in key changes and rural mobility as a whole will be vital to the strategy remaining live and up-to-date. The findings from monitoring and evaluation will be reported and disseminated regularly and widely to enable others to learn from the strategy delivery.
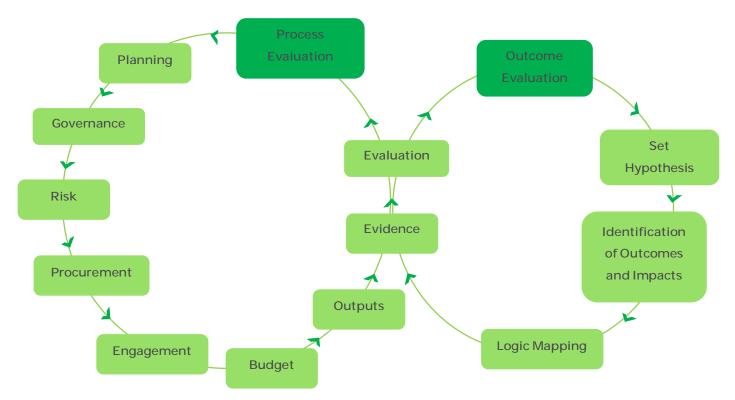
MONITORING AND EVALUATING THE PILOTS

Monitoring and evaluation will be vital to the pilots, as knowledge gained from them will directly shape the delivery of rural mobility projects across the region and, potentially, beyond. The following broad framework has been developed which individual pilots can use as the basis for more detailed monitoring and evaluation proposals.

The framework is split into two distinct parts, outcome evaluation and process evaluation, directed by an overarching set of objectives for the pilot. The objectives will vary from pilot to pilot, but will all have common themes. An example of these objectives has been provided below for a community-led rural mobility pilot for a single settlement:

§ Develop a commercially, financially and operationally sustainable model for the delivery of a bundle of community-led rural mobility interventions for less affluent remote rural towns.

§ Provide an exemplar and best practice for the delivery of rural mobility by the community sector.

§ Trial the development and operation of community-led interventions within the rural context.

§ Engage with communities and stakeholders to enhance pilot programme and support delivering the right solutions for local areas.

§ Monitor and evaluate the pilot, understand what impacts and benefits have been generated and why, and disseminate findings widely.

§ Provide rural communities with greater access to employment, education, healthcare and wider services.

§ Reduce the number and length of journeys rural residents need to make while providing more active travel, publicly-available and shared options, increasing access and reducing carbon emissions.

§ Make alternatives to single occupancy private car journeys more attractive, inclusive, convenient, reliable, affordable and safe.

§ Increase the productivity of remote rural towns by investing in local transport and mobility to grow interconnectivity and increase efficiency.

§ Make best use of existing mobility networks, enhancing them with new mobility solutions and aggregating activity into hubs of activity.

Figure 21: Monitoring and Evaluation Framework

CASE STUDY: BOB THE BUS (DEVON)

The need for a long-term community bus service around the rural town of Totnes in Devon was well established following several trial periods of increasing reach first starting in 1997.

Since its inception, the service has undergone several iterations. It initially served as a shuttle service through Totnes' main shopping street, which sits along a steep incline which was challenging for less able shoppers. The service subsequently expanded, including a distinct school service for local children following the removal of the public bus service due to budget constraints, as well as services to local campsites during the summer season.

Now managed by 'Totnes and Rural Community Bus', and following several funding awards from government and charities, the service now comprises four buses that serve nine rural areas alongside Totnes town centre, Follaton and Bridgetown. There are currently 38 residents who drive for the service on a volunteer basis.

These objectives are either outcome focused or process focused to provide direction to both sides of the monitoring and evaluation process.

OUTCOME EVALUATION:

The outcome evaluation is primarily concerned with the achievements of the pilot in terms of delivering improvements to rural mobility in support of wider environments, social and economic objectives.

The setting of hypotheses will help to further define what the pilots and interventions could achieve, acting as a starting point for the pilots so they can be tested to see if the hypothesis is true. This is usually determined before any applicable research is conducted.

Identification of outcomes and impacts are both the intended and unintended results of the pilot and can be identified using logic mapping. Logic mapping provides an understanding of the desired outcomes (short-medium term) and the impacts (long-term). The logic maps would generally include a context of the pilot and the inputs, activities and outputs before identifying the outcomes and impacts.

PROCESS EVALUATION

The process evaluation will be primarily concerned with how the pilot was delivered and what can be learned from its development, planning and operation. Allowing for a proportionate approach to the use of the applicable resources, the key elements to be evaluated:

§ Planning and programme management: how the pilot was planned and programmed and whether timescales were met.

§ Governance: How the pilot was organised, including roles and responsibilities, and what learning can be gained.

§ Risk Management: How risks were managed and which become issues and how they were resolved.

§ Procurement: What approaches to procurement were used and what improvements could be made.

§ Engagement management: what engagement was undertaken, how that supported the pilots and how could it be improved.

§ Budget: What funding was secured, how was it used and managed, and how sustainable were the commercial models.

§ Outputs: What was physically delivered by the pilot.

For both the outcome and process evaluations, sets of *evaluation* questions will need to be developed to express what is to discovered or known from the pilots. A detailed set of *evidence* will then be specified to be collected throughout the pilot process. The evidence will be based on numerical data and user experiences as well as information on the management of the pilots.

An outline monitoring and evaluation plan should be developed as part of the bid for funding for the pilots. Following funding, a more detailed monitoring and evaluation plan needs to be developed before the evaluation questions are drawn and evidence is gathered.

To effectively evaluate the pilots, pre pilot and counter factual evidence should be collected before the pilots, in addition to evidence during and at the end of the pilot process. It will be particularly useful to compare equivalent places where the pilot has not been conducted.

A monitoring and evaluation report should then be produced at the end of the pilots. However, it is important to note, as mentioned earlier, that there should be monitoring and evaluation conducted throughout the pilot process, including through the development stages, with findings being disseminated on a regular basis.

PERSONAS

Using the personas identified earlier, the following provides an indication of the benefits different people may realise through the delivery of the strategy:

Figure 22: Impact on Our Personas

COMFORTABLE CATRYN

The demand responsive transport service means Catryn's son gets to college on time while the Quiet Lanes Network gives her the courage to cycle to work. Rural-based taxi services mean that the family can use that if they miss the bus or need to be out at unsociable times. The community volunteer deliveries means that their shopping can always be delivered from the local shops. Catryn's husband also volunteers his time and vehicle and, as a result, the family have built a network of local friends in similar positions.

RELAXED RON

The Volunteer Bus Service allows Ron and his wife to visit friends in nearby villages which significantly increases their network. If they miss the bus, they are confident in using the ride-sharing solutions that have been specifically designed for older people. With better cycling facilities and a local e-bike library, Ron is able to be a bit more active and healthy. Coupled with local businesses using e-cargo bikes, he can cycle into the centre of town and do his shopping knowing the shops can deliver to him.

HUMBLE HELEN

Having a better, more predictable inter-urban bus service means Helen can use her car less. In nicer weather she takes her e-bike with her on the bus and cycles home at least part of the way. The rural hub allows Helen and her wife to conduct most of their business and "admin" nearby, without having to travel to the larger towns. They have aspirations of selling their car once they have had experience of using the peer-to-peer car club more frequently.

SKILLED SHANE

Shane's family is able to use the community shop at the Rural Hub to access services that would otherwise have resulted in a long bus ride. Its small business hub gives him a place to work with good internet so he doesn't have to rely on his personal phone so much. He is using the e-cargo bike hire to make more local client trips without his van. His partner uses the demand responsive bus to access a wider area for work and they use the car club to get to leisure activities rather than relying on his uncomfortable and inefficient van.

ACTIVE ASHLEY

Ashley is able to use the demand responsive transport service to help him get further afield, while his parents are happy as this is more predictable and requires less waiting at bus stops than a traditional bus. The rural hubs bring businesses together which can reinvigorate small communities which can offer Ashley more opportunities to find part-time work. Better cycling facilities mean he is able to use his bike to get to villages and towns nearby that would have otherwise been inaccessible.

NEXT STEPS

The key next steps in delivering this strategy are focused on developing the pilots into live trials of rural mobility in the South West. Following the publication of this strategy, Peninsula Transport and Western Gateway will work to secure funding to support the development and delivery of the pilots. This first step will be vital to enabling the launch of a process to secure a number of pilots across the South West. Without initial funding from the STBs, the pilots are significantly less likely to be run.

However, once funding has been secured, we will put in place the following steps to develop the pilots:

§ We will work with key major stakeholders across the region to secure their support and seed funding for the pilots, both generally across the South West and within the areas where we consider pilots should be delivered. Such stakeholders will include, but not be limited to, DfT, DEFRA, local transport authorities and the major mobility service and transport / energy / digital infrastructure operators.

§ The next step is to identify and agree the places to act as the pilots. It is proposed that officers are delegated to draw up the shortlist of places and a report be brought back to the Board for approval. This shortlisting will consider specific locations covered by the priority settlements, and other locations considered appropriate, but also the extent of existing services and infrastructure in those areas, to facilitate "quick wins" where possible.

§ We will then develop a prospectus for the pilots, setting out our proposed approach and the priority areas in which the pilots should be undertaken.

§ The publication of the prospectus will mark the launch of a competition for initial proposals for potential pilots. We will welcome Expressions of Interest for pilots led by local authorities, the private sector or community organisations, in partnership with others to develop and deliver the pilots within our priority areas.

§ From the Expressions of Interest, we will select a shortlist of projects to receive initial exploratory STB funding and specialist rural mobility consultancy support to develop the outline business cases for their pilots. These outline business cases will be submitted as final bids for STB funding and support.

§ On receipt of all those submissions, the STBs will make a final selection of pilots to receive funding from the STBs. Whilst the STBs will provide some of the funding for the pilots, successful bids will need to include other match or contributor funding and resources in kind. Requirements may vary depending on the scale of the proposed pilots and the organisations involved.

SUMMARY: DELIVERING FOR OUR RURAL COMMUNITIES

The current approach to rural mobility has not worked for many local communities and economies in the South West. They suffer from disconnection, lack of access to everyday services, poor affordability and restrictions in choice. In facing the climate emergency, rural areas are also, comparatively, higher generators of harmful emissions.

This strategy has set out a range of proposals that could help to turn around rural mobility and build new approaches to support our countryside and coastal communities to become more connected, more accessible and more prosperous.

We believe piloting some new approaches will be a first major step in delivering more for our rural areas. Peninsula Transport and Western Gateway cannot deliver these pilots alone and we look to work with our partners, stakeholders and communities to set those pilots on their way.

GLOSSARY

Rural – for the purposes of this strategy, our definition of rural encompasses all places outside of major urban centres that are in the countryside or coastal, including estuarial. This therefore includes market towns, villages, hamlets and isolated buildings, and surrounding countryside, that are inland or close to the coast.

Coastal – for the purposes of this strategy, our definition of coastal includes all locations on the sea coast and tidal estuaries. When referring to coastal settlements, we have considered as being coastal any settlement which has an area within its boundary 1km or less from a coastline or an estuary.

Active travel – this refers to modes of travel that require physical activity by the user such as walking, cycling and self-powered mobility devices (e.g. kick scooters).

AV – Autonomous Vehicle, sometimes referred to as Connected Autonomous Vehicle or CAV. However, to operate, it is highly likely that AVs will need to be digitally connected, either continuously or periodically, therefore, 'connected' will be integral to AVs.

Business as usual – the normal, day-to-day or standard way of operating.

Bike-share – a bicycle sharing system where pedal or electric bikes are provided for use by the public via subscription or one-off payment. Systems can be docked or dockless.

Car club – a service model where users join a 'club', either on a one-off or subscription basis, that enables them to rent a car or van for short periods of time; usually minutes or hours. Vehicles are often parked on street and can have spaces designated to them.

Connectivity – in the context of mobility, connectivity represents the effectiveness of the transport network for the movement of people and goods.

Digital-as-a-mode – service models that enable people to undertake activities using the digital devices including working, education, healthcare, retail, leisure and social interaction. Such models include video-conferencing, local authority online services, online medical appointments and online retail.

Digital connectivity – the role of digital technologies in supporting mobility, particularly through access to a fast and reliable internet connection.

Digital or dynamic demand responsive transport (DDRT) – A mode that mixes the flexibility of taxis with larger capacity shared vehicles, typically mini-buses. Passengers use digital devices to book an end-to-end journey via a shared passenger transport vehicle that operates on a non-fixed route or timetable which dynamically flexes to the journeys booked by passengers.

E-cargo bike – a cycle using electrified assistance to pedalling (with two, three or four wheels) with freight carrying capacity used for local logistics

E-scooter – an electrified 'kick' scooter on which a rider stands on a platform between front and rear wheels and holds onto handle bars.

Electrified mobility – this refers to the electrification of mobility including battery electric and hydrogen fuel cell electric propulsion.

EV – electric vehicle, with either battery electric or hydrogen fuel cell electric propulsion.

Freight consolidation – a logistics strategy where multiple shipments are combined into one load and transported to a distribution point where the load is broken up into smaller shipments for delivery to final destinations. Consolidation can occur at different scales from regional logistics hubs served by rail and HGVs down to local 'micro-consolidation' centres in neighbourhoods served by light electric vans and e-cargo bikes.

First mile/last mile – the first or last sections of journeys, usually between the journey origin and a mass transit stop/station (the first miles) and from a stop/station and the destination (the last miles). This term neglects the fact that these sections of journeys are often longer than a mile and, in rural areas particularly, such journeys can be many miles.

Hamlet – a settlement that is smaller than a village but larger than an isolated dwelling.

Inter-urban movements – movements between urban centres.

Intra-rural movements – movements purely within rural areas.

Isolated dwelling: The smallest kind of settlement, typically with only one or two households.

Levelling up – for the purposes of this strategy, our definition of levelling up is "*prioritising investment to increase equality and life opportunities in rural communities that are most in need*".

Low level air or drones – applies to low level uncontrolled airspace, between the earth's surface and the part of the sky for which air traffic control is applied. Mobility in this space could be provided by Unmanned Aerial Vehicles (UAVs or drones).

Mass transit – major public transport systems for the moving of large numbers of people; typically bus, bus rapid transit, light rail and heavy rail.

Micromobility – transport using small lightweight, often electric, vehicles; typically e-scooters, bikes and e-bikes.

Middle mile – the main, longer sections of journeys; typically mass transit or car journeys which are often supported by shorter 'first mile/last mile' sections at either end.

Mobile services – the provision of services on a moving basis across a variety of places, rather than fixed services.

Mobility – the movement of people, goods or data via digital or any physical means.

Mobility as a service (MaaS) – the integration of multiple mobility modes and services into a single digital planning, booking and payment channel.

Mobility hub – a modern transport interchange bringing together traditional and new modes and services with supporting infrastructure and traveller facilities. Often used to increase zero emission, active and shared mode choices and support first mile/last mile connectivity to mass transit. Increasingly, hubs are considering the provision of wider community and commercial activities to make hubs a focus for local activity. Often referred to as rural hubs within the rural context where the main use may be commercial or community functions with mobility supporting.

Net Zero – the state in which no more greenhouse gases are produced than are sequestered from the atmosphere.

Peer-to-peer – a decentralized platform in which individuals interact directly with each other, rather than through a third party.

People-centric – An approach to mobility and planning that puts its users front and centre by designing to specifically target their needs.

Place – The definition of place varies according to the context but for the purposes of this strategy, place refers to settlement type and is characterised by a range of factors including location, area and population.

Place-centric – An approach to mobility and planning that deliberately targets specific places by considering its unique strengths and weaknesses and designing accordingly.

Publicly-available transport – broad definition of transport that is available for use by the general public encompassing traditional public transport (see definition below) and modern shared modes such as ride-sharing, ride- hailing, car clubs, bike hire, e-scooter hire, etc.

Public transport – traditional definition applied to publicly-provided transport, most notably bus, tram and train and sometimes taxi.

Resilience – The capacity to recover quick from challenges, often in reference to climate resilience or energy resilience.

Ride-sharing – schemes that match private vehicle drivers with potential passengers (often co-workers) making similar regular or one-off trips.

Ride-hailing – schemes that match customers with available rides using a smartphone app. Users can register their desired trips and pay on account via pre-approved payment methods with prices set according to supply and demand. These journeys can be 'sole use' for single journeys or 'shared' by people making different journeys (e.g. DDRT)..

Shared mobility – services that enable people to access modes when they need them but without owning them. This is facilitated through apps and websites, and often included car clubs, bikes, e-bikes, e-cargo bikes and e-scooters.

Town – a settlement that is smaller than a city but later than a village

Transport – in the context of this strategy, transport is defined as physical travel, personal or freight/logistics, via vehicular modes. This excludes walking or digital-as-a-mode activities but includes, for example, bikes, scooters, private car, taxi, bus, tram, train, aircraft and maritime (ferry or cargo ship). Transport modes can be privately 'owned' or publicly available.

Urban – a settlement with a high population density and a built environment. According to the Office of National Statistics and particularly with reference to census data, urban areas are those with a population of greater than 10,000.

Urban fringe – the place interface between urban and rural areas, sometimes also referred to as the urban-rural fringe, the urban outskirts, or the peri-urban.

Village – a settlement that is smaller than a town but larger than a hamlet.