



Emailed to: futureoftransport@dft.gov.uk

16 February 2021

Dear Sirs,

Future of Transport: rural strategy – call for evidence

I am writing to you as Lead Officer for Transport for the South East (TfSE) to provide a response to the Future of Transport: rural strategy call for evidence.

Transport for the South East (TfSE) is a sub-national transport body (STB), which represents sixteen local transport authorities. These are Brighton and Hove, East Sussex, Hampshire, Kent, Medway, Surrey, West Sussex, the Isle of Wight, Portsmouth and Southampton, and the six Berkshire unitary authorities. These authorities are represented on the Shadow Partnership Board along with representatives from the region's five Local Enterprise Partnerships, District and Borough authorities, the protected landscapes in the TfSE area, Highways England, Network Rail and Transport for London.

TfSE provides a single voice on the transport interventions needed to support sustainable economic growth across its geography. The South East is crucial to the UK economy and is the nation's major international gateway for people and business with some of the largest ports and airports in the country. High-quality transport infrastructure is critical to making the South East more competitive, contributing to national prosperity and improving the lives of our residents.

Joint STB response

This response supplements the joint STB response which has been submitted on behalf of the seven Sub-national Transport Bodies. The joint response sets out our joint thinking on the questions posed in the call for evidence, and highlights many of the possible solutions to ensure that the Future of Mobility: Rural Strategy adequately addresses key issues facing rural communities across the UK.

The purpose of our supplementary response is to set out a methodology for identifying mobility solutions that is based on the propensity for demographic segments of our population to use those solutions. This is combined with a place-based typology that enables the different forms of mobility that are likely to be attractive to users across different rural, and urban, place types to be identified.

Our approach has been developed working with WSP and Steer as part of the development of a Future Mobility Strategy for the TfSE area. This forms part of our wider work to realise our 2050 vision set out in our transport strategy. Although the methodology developed is primarily used to identify propensity to use future mobility solutions, our submission as part

of this call for evidence identifies the potential for the wider application of this approach to highlight potential solutions to the mobility challenges across different rural populations and geographies.

For clarity, in this methodology ‘future mobility models’ are not simply focussed on technology and innovation, they also consider the ways in which mobility is planned, delivered and monitored. In doing so, future mobility has the potential to change the approach from one focussed on planning for vehicles, as has been the case from the mid-20th century, to a new direction which plans for people and their needs, and the places where they work, learn, shop and play.

Approach to the development of population segmentation

The approach has been developed based on the principle that in planning for the needs of people and organisations, it is not sufficient to understand just what their general needs are, in terms of their employment, education, healthcare and other needs, It is also necessary to understand how these needs vary from person to person and from place to place. These varying needs will affect peoples’ propensity to use different mobility modes, services and infrastructure and has the potential to put people back at the heart of the transport system.

The development of this approach has considered how communities vary across the area and how demographics are changing and will continue to change over the coming decades. Some of the major environmental, economic and social trends and how these may affect communities across the area have been identified. By analysing the different mobility service models that could be available, such as ride sharing and Mobility as a Service (MaaS) platforms, an assessment has been made of how these meet the needs of different groups of people across the TfSE geography. To do this, a range of discrete social segments have been identified which seek to reflect the key differences in the people and communities across the population of the area.

The sources of data used to create and profile the social segments include the 2011 Census, the National Travel Survey and an on-line survey undertaken by Steer of 2,000 people. The Steer survey examined attitudes towards various social and technological trends. This analysis has enabled seven demographic segments to be identified with each segment representing those with particular mobility needs and requirements, depending on where they live, along with their personal, social and environmental attitudes and characteristics. (See Table 1)



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Table 1: TfSE Segment Summaries 2020

Segment	Description
Village Life	The population of this segment live in areas that are less densely populated, typically in a village or small town. They tend to be older, well-educated and live in detached properties which they own, though an above average proportion live in retirement homes. Each household is likely to have multiple motor vehicles, with these being the most common method of transport to their places of work.
Central Connectivity	The majority of people in the Central Connectivity segment live in relatively densely populated urban areas. They include an above average proportion of young adults without children, including full time students. They tend to live in places where they can walk, cycle or use public transport to get to work.
Family Terraces	This segment typically live on the edge of a town centre, in the transitional areas between the core and the suburbs. There is an above average proportion of families with pre-school or school age children. Typically, they will have one car between two adults, with one driving to work and the other walking or using public transport.
Service Sector Workers	The Service Sector Workers segment tend to live in urban areas and work in the information and communication, financial, public administration and education related sectors. There is an above average likelihood of having young children in the household and a below average likelihood of older age adults.
Comfortable Self-Sufficiency	Those in the Comfortable Self-Sufficiency segment are typically approaching retirement age or already retired. They tend to live in a detached property or flat and are quite likely to have paid off their mortgage and have no dependent children. Therefore, while they may have a modest income are still quite likely to have both time and money.
Semi-detached Suburbia	People living in areas of Semi-Detached Suburbia will typically have school age children and own at least one car. They will mostly work in information and communication, finance, public administration and education sectors. It also includes some recently retired people living in semi-detached or detached housing.
Traditional Towns	Households in this segment are more likely than average to have older non-dependent children and to live in semi-detached or terraced properties. Their level of qualifications tends to be lower than average with jobs typically in the wholesale and retail, energy and transport related industries.
Sparsely populated	Locations with very few people living there (less than 50 people per 1km Hexcell)



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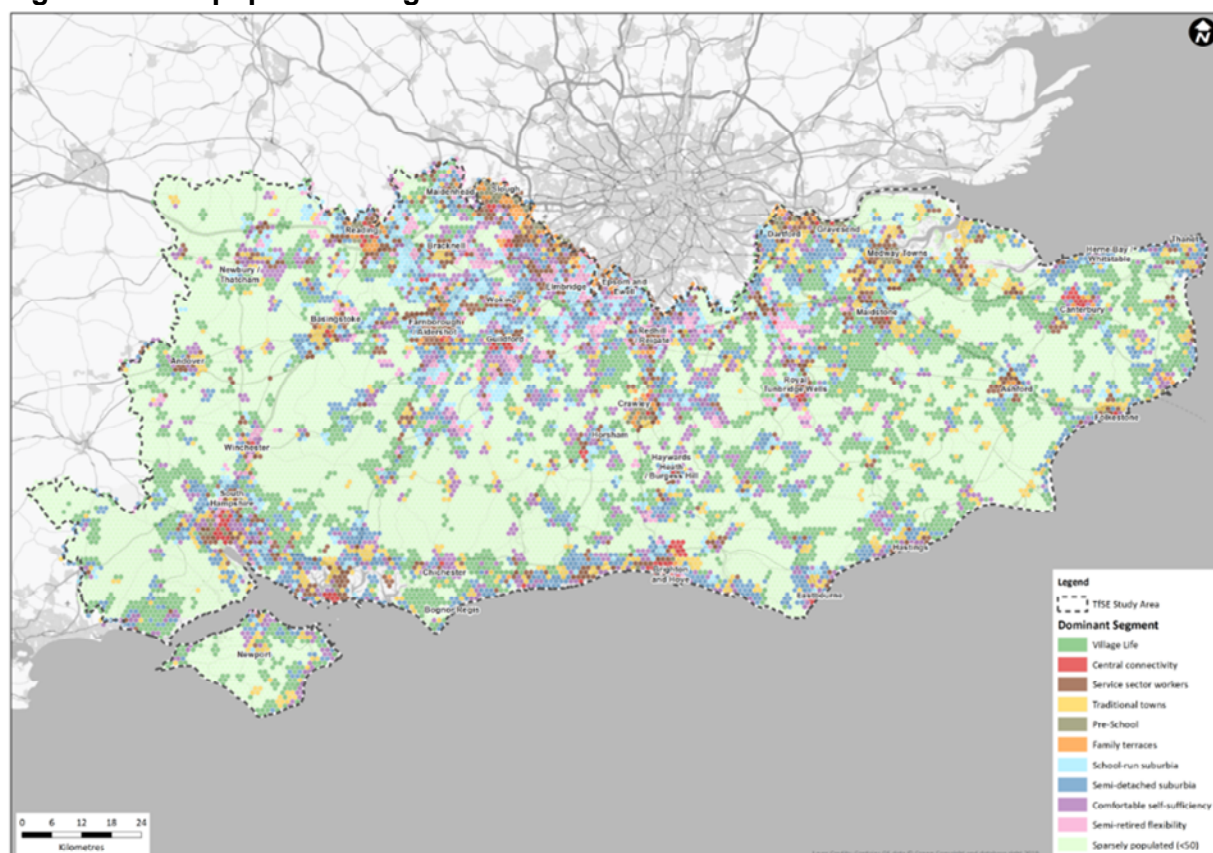
A further three segments have also been identified that are emerging from the seven segments identified above, and which are projected to grow in significance due to the influence of emerging trends. These are identified in Table 2

Table 2: Summaries of emerging segments

Segment	Description
Pre-school	Under 30's contemplating starting a family and who would like to bring children into a better and more sustainable world. They tend to live in well-connected urban areas, where they have access to good public transport and there is therefore no need to own a car. They are happy to make maximum use of technology to minimise their carbon footprint, and when they do need to use car are likely to hire an electric vehicle.
Semi-retired Flexibility	Relatively affluent mature professionals who are looking to wind down their careers and perhaps work part time. They are looking to make use of the time they free up to participate in a range of activities and experiences, many of which will involve travelling. They typically live in a detached house on the outskirts of a pleasant town or village where they are close to the countryside. They are very likely to own a car but will travel by rail if the service is good.
School-run suburbia	Families with school age children typically living in a suburban area, ideally with a rail station to provide links to their local town centre, as well as London. Encouraged by their children, they like to use local produce and to shop locally. They are avid recyclers and try to avoid unnecessary travel. They are quite likely to own a car, though it is also likely to be a low emission vehicle and they are happy to give lifts to neighbours and fellow parents.

A geo-demographic analysis was then undertaken based on the Office for National Statistics Output Area Classification, that identified which of the ten demographic segments was dominant in each 1km square in the TfSE area. The only exceptions were the sparsely populated areas which have less than 50 residents living in them, which were not allocated a dominant segment. The result of this analysis provides an indication of the different requirements of populations living in different areas as well as their propensity to use different forms of mobility. (See Figure 1)

Figure 1: TfSE population segments



The analysis has also examined the potential impact of key trends on the ten demographic segments, to demonstrate how different communities may be impacted by trends such as digital connectivity, a desire to work more flexibly, shared mobility options or having greater environmental awareness. (See Table 3)

Table 3: Interaction between trends and segments

	City attraction	Going on-line	More active mature population	Sharing economy	Delayed adulthood	Environmental awareness	Working flexibly
Village Life	low	high	high	low	low	low	high
Central connectivity	high	high	low	high	high	high	low
Family terraces	med	low	low	high	med	low	low
Pre-school	med	high	low	high	high	high	med
Service sector workers	med	med	med	med	med	med	med
Comfortable self-sufficiency	low	low	high	low	low	med	med
Semi-retired flexibility	low	high	high	high	low	high	high
Semi-detached suburbia	low	med	med	low	med	med	med
School-run suburbia	low	high	low	med	low	med	low
Traditional towns	low	low	med	low	med	low	low



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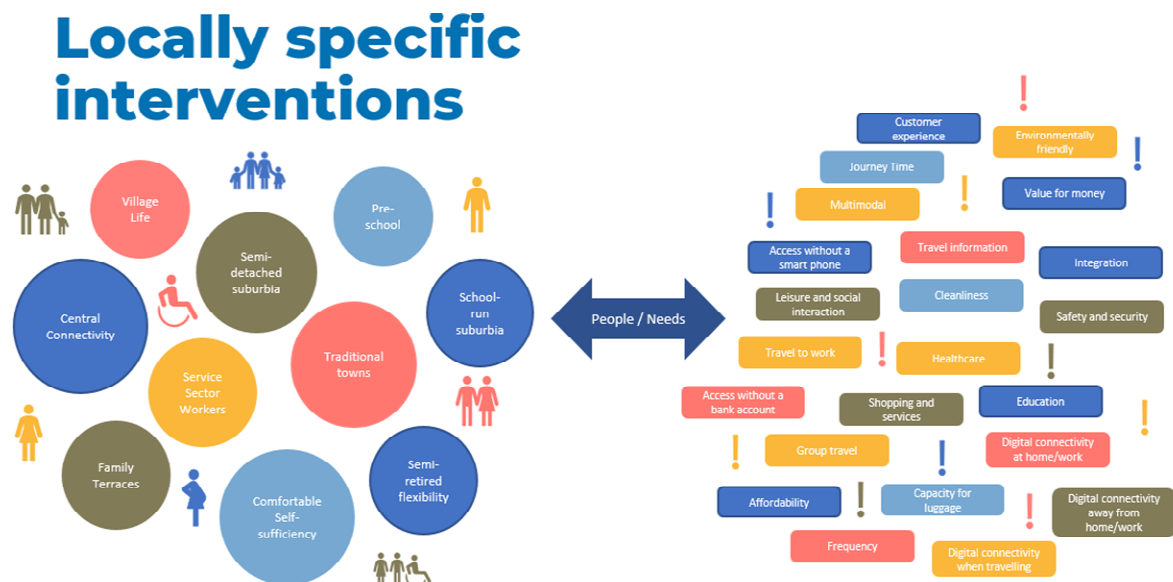
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The potential impact of these drivers on the travel choices they may make, and their propensity to use different forms of mobility if they were to be made available to them were then examined (See Figure 2). This approach can also be used to identify appropriate mobility solutions for rural communities, as well as their potential level of success in attracting users. The approach that has been developed could be applied elsewhere outside of the TfSE geography.

Figure 2: TfSE segments and propensity



The result of the analysis is a series of ‘pen portraits’ of each of the ten population segments identifying where they are located across the TfSE geography, their current use of traditional transport modes, their propensity to use new mobility modes and an assessment of their attitudes and behaviours on travel related issues. User profiles for different future mobility models such as ride sharing, mobility asset sharing and MaaS platforms have also been developed which identify the key characteristics of those most likely to adopt and use those forms of mobility.

To provide an example of the approach, one of the seven segments identified is ‘Village Life’. The population of this segment live in areas that are less densely populated, typically in a village or small town. They tend to be older, well-educated and live in detached properties which they own, though an above average proportion live in retirement homes. Each household is likely to have multiple motor vehicles, with these being the most common method of transport to their places of work. This segment currently comprises around 350,000 of the total TfSE population of 7.5 million .

The analysis shows that this demographic is likely to be impacted by trends including increased internet connectivity, a more active mature population, and working flexibly, whilst being less likely to be affected by trends including a sharing economy and environmental awareness. The segment has a below average propensity to use bus and rail,

with an above average use of the private car. However, in regards to future mobility models, this segment has an above average propensity to use Digital as a mode services, such as those that enable people to undertake activities using digital devices including work, education, healthcare, retail, leisure and social interaction. Such models include video-conferencing, local authority online services, online medical appointments and online retail.

Approach for the development of place-based typology analysis

Another element of the approach is a place based categorisation of the different rural and urban settlements across the geography, based on their population characteristics including population size, access to services, employment levels, income characteristics, skills level, proximity to railway stations (in this instance used as a proxy for being connected to the wider transport network) and current mode share. This is then combined with the demographic segmentation outlined above to identify packages of mobility interventions for a particular place based on the propensity of users to use those services. The result is a unified people and place-based approach to identifying possible mobility interventions.

The application of the methodology in the TfSE area has identified five different urban (See Table 4), and five different rural place categories (See Table 5). This analysis has enabled the TfSE area to be categorised into distinct areas which have differing levels of accessibility to services and connectivity with the wider area.

Table 4: TfSE Urban categories

Urban area classification	Type of urban area	No. of Settlements in the TfSE area
Coastal and estuarine Major Economic Hubs	Coastal and Hinterland Urban	27
Well-connected larger rural hinterlands further from London	Well Connected Urban	24
Large urban centres		
Local and regional administrative centres further from London	Local Centres Urban	18
London commuter towns	London Commuter Urban	24
London Orbital business hubs	London Orbital Urban	16



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Table 5: TfSE Rural categories

Type	Sub-types	No. of Settlements in the TfSE area
Coastal Rural	Coastal Rural (good accessibility)	29
	Coastal Rural (poor accessibility)	36
Well Connected Rural	Well Connected Rural (good accessibility)	111
	Well Connected Rural (poor accessibility)	138
Local Centres Rural	Local Centres Rural (good accessibility)	69
	Local Centres Rural (poor accessibility)	74
London Commuter Rural	London Commuter Rural (good accessibility)	49
	London Commuter Rural (poor accessibility)	54
London Orbital Rural	London Orbital Rural (good accessibility)	23
	London Orbital Rural (poor accessibility)	27

A subsequent assessment of propensity of each settlement type to use future mobility models will be undertaken, with the analysis based on the following:

- Categorisation of the type of place (based on the methodology presented above);
- analysis of the most prevalent population segments in each place;
- the propensity of each population segment to use future mobility models; and



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- the personal and social characteristics of potential users of future mobility models

The resulting analysis will identify a prioritised list of service models and infrastructure interventions for each place typology, which will provide insight into possible mobility solutions across the TfSE area.

One of the place types that has been identified is Local Rural Centres. Across the TfSE geography there are 69 settlements of this type, with a total population of over 104,000. These settlements are characterised as historic, minor rural centres (e.g. prominent market towns with a good supply, relative to their urban areas, of amenities), which are constrained from expanding to accommodate proportionately more housing due to 'greenbelt' and environmental constraints (e.g. National Parks and Areas of Outstanding Natural Beauty). Access to services is relatively poor compared to other subcategories. Level 4 qualification levels are relatively high.

Similar to the 'Village Life' segment described above, these settlements and their demographics are identified as having a propensity to utilise Digital as a Mode services. The analysis also suggests that settlements such as these could evolve to become an economic force in their own right – through development of connected, smart and green technologies. Settlements with access to services such as a train station, schools, post office and shops are likely to be attractive locations for home working, with increased provision of localised flexible workspaces and good digital communications.

The methodology is currently being refined further to identify bundles of interventions for each place typology that will begin to identify solutions to many of the transport issues that are of concern to rural communities.

Conclusion

TfSE welcomes the opportunity to respond to the call for evidence on the Future of Transport: Rural Strategy. We fully endorse the joint STB response submitted on behalf of the seven STB's, which addresses the questions posed in the call for evidence. This supplementary TfSE submission has set out a methodology that has been formulated by WSP/Steer as part of the development of TfSE's Future Mobility Strategy. The approach enables mobility interventions and measures to be identified based on an analysis of the characteristics of the population and the characteristics of the place in which they reside. We believe the methodology has wider applicability and could easily be applied elsewhere to identify possible transport solutions to meet the particular needs of differing rural communities, and that this will be of interest to those formulating rural transport strategies.

We would welcome the opportunity to discuss the approach further with the Department, as we are keen to help identify solutions to the major transport issues facing rural communities across our geography and beyond.

This is an officer response. The TfSE Shadow Partnership Board meets on 26 April 2021 and will consider this draft response and a further iteration of this response may therefore follow.



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Yours sincerely,

A handwritten signature in blue ink, consisting of a stylized 'R' followed by a series of loops and a trailing line.

Rupert Clubb

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