Agenda item 11

Report to: Partnership Board –Transport for the South East

Date of meeting: 19 March 2026

By: Chief Officer, Transport for the South East

Title of report: Analytical Framework

Purpose of report: To provide an update with the development on the TfSE analytical framework.

RECOMMENDATION:

The Members of the Partnership Board are recommended to comment on the progress with the development of the analytical framework.

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1. Introduction and Background

1.1 This report provides an update on the development of the analytical framework to support the technical work programme, business case development and delivery of the schemes within the Strategic Investment Plan (SIP).

1.2 The analytical framework route map was initially approved at the Partnership Board meeting on 23 January 2023. This was followed by the endorsement of a refreshed route-map on 13 July 2024 to ensure its continued relevance and alignment with local challenges, while also ensuring value for money.

2. Data

2.1 The building of our back office data architecture is underway. The data architecture will consist of a virtual machine hosting a database to store modelling data produced by various TfSE workstreams. Various software tools required to produce, interrogate and visualise the data will also be available on the virtual machine creating a back office solution that will enable efficient sharing amongst our partners. We are procuring a support contract with an external consultant to provide technical assistance with configuring the database. We are now awaiting confirmation from ESCC IT regarding the timeline for the virtual machine setup.

2.2 Regional travel survey factsheets, covering the TfSE area and five sub-regional areas (Kent and Medway, Sussex and Brighton, Surrey, Hampshire and the Solent, and Berkshire) have been developed and will be published via the Centre of Excellence platform. These provide insight into different travel patterns across the region in an engaging and easy to digest way. The raw data and questionnaire are available upon request. The factsheets are included for information at Appendix 1.

2.3 We have now received the BT mobile network data. This dataset is a key source of information for understanding travel demand in the region and a critical input for building transport models. The raw data is available to all LTAs upon request. We have also been working closely with consultants responsible for developing models for several LTAs in our area as the data has been validated. This collaboration ensures that the data will be robust and fit for supporting their own modelling and strategic planning work.

2.4 We have also received freight origin destination matrices data from MDS Transmodal, the developer of the Great Britain Freight Model. As with the mobile network data, the freight origin destination matrices are available to all LTAs in the region upon request.

2.5 We have contacted all the planning authorities in our geography to refresh our housing and employment site planning dataset. This dataset requires regular updates to ensure the data quality is as reliable as possible. We have currently received returns from over 75% of our local planning authorities. Once the dataset is complete for the whole region, we will be able to share the data with our local transport authorities to be used as an input for transport planning workstreams. This will avoid the requirement for each of our LTA's to collect the data separately, duplicating workload, often at cost from consultants time.

3. Analytical tools

3.1 We have completed the development of the Travel Market Synthesiser, an analytical tool designed to generate synthetic origin destination matrices for a specified year, tailored to TfSE's area. As the next step, the tool will integrate with mobile network data and enhance data granularity across transport modes, trip purposes, and socio-economic groups. The tool and the associated travel demand data are available to all LTAs in the region.

3.2 The next phase of the South East Highway Assignment Model (SEHAM) development is underway. This phase includes rebasing the model to a 2024 base year and developing future forecast models for 2031, 2041, and 2051. The 2024 model and the future year models are scheduled for completion by the end of the 2026/27 financial year. Once completed, the updated models will provide robust road network analysis and a strong evidence base for TfSE and its partners.

3.3 We have participated in several training sessions with Podaris, a strategic planning and modelling tool that we have procured to support analysis work. The training focused on how to use the tool to test public transport interventions. We will use Podaris to provide additional analysis for one of the schemes we are supporting through early stage development - the South East Hampshire Rapid Transit.

3.4 We are also in discussions with Podaris to hold a webinar via the Centre of Excellence to introduce the tool to a wider LTA audience. The proposal negotiated with Podaris offers our constituent authorities a discounted rate for accessing the tool by joining our multi-tenanted workspace.

4. Engagement

4.1 We held our fifth South East Modelling & Appraisal Forum. During the forum, representatives from LTAs provided updates on the development of their data and analytical tools. TfSE officers also presented the proposed analytical framework development for 2026/27 and the support TfSE can provide to our LTA's. Officers then took part in discussions to identify shared priorities for the coming year.

4.2 Together with England's Economic Heartland and Transport East, we met with the DfT's Congestion and Road Length Statistics team to explore how we can better utilise DfT's congestion and journey time data (e.g. INRIX) in our work. We will be gathering feedback from our local transport officers on potential use cases. The group will reconvene once shared challenges and opportunities have been identified, to determine whether there are national and/or regional opportunities for collaboration.

5. Next Steps

5.1 Following confirmation of our DfT funding grant for 2026/27 work is underway to review the future development stages of TfSE's analytical framework and to refresh the development routemap.

5.2 The 2026/27 DfT grant enables the analytical framework to be largely developed, with the majority of data acquired and the tools and models built. A key consideration will be on supporting the needs of existing and emerging authorities across the region. A workshop has been held with our supply chain partners to ensure the component parts of the programme are considered holistically and delivered as efficiently as possible.

5.3 Proposals are also being developed for a "TfSE Offer" setting out what data and analytical services would be provided as part of the TfSE core funding contribution, and what additional services could be commissioned for additional charge as part of a wider subscription model.

5.4 A revised analytical framework routemap and proposals for a "TfSE Offer" will be brought to the July meeting for consideration by the Partnership Board.

6. Financial Considerations

6.1 The work set out in this report is being funded from the DfT grant allocation awarded to TfSE for 2025/26.

7. Conclusions and recommendations

7.1 The Partnership Board is recommended to comment on the progress with the development of the analytical framework.

RUPERT CLUBB
Chief Officer
Transport for the South East

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Appendix 1

Regional Travel Survey: TfSE Region

The Transport for the South East Regional Travel Survey improves understanding of how people travel across the South East, and supports local transport planning. Aligned with the National Travel Survey, data was collected through extensive travel diary surveys, enabling more detailed analysis of local travel behaviour by local authorities. This factsheet summarises key travel patterns across the TfSE region in 2024/2025. We have also created factsheets for the individual areas in our region.

How people are travelling

Average number of trips per person per year **943**

Overall, people in the region made more trips per year than the England average (943 compared with 922) and travelled significantly further each year (8,900 miles compared with 6,082 miles).

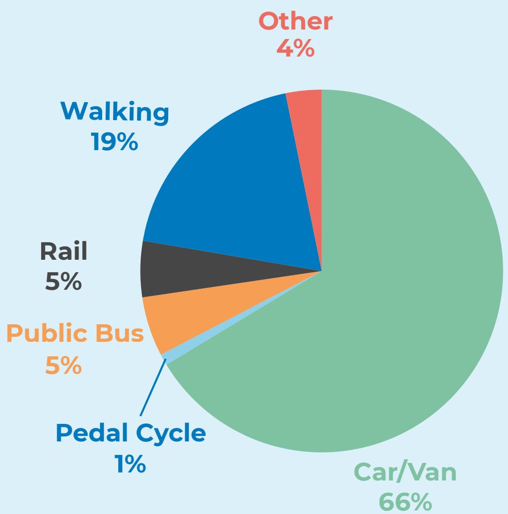
Average trip durations

13-23 minutes

17-19 minutes

20-23 minutes

Trips by Mode



Travel in the TfSE region is strongly shaped by car use, which accounts for a higher share of trips than the England average (59%). The region also shows lower levels of walking and cycling. These trends provide important context for understanding travel behaviour across the region and the challenges and opportunities it presents.

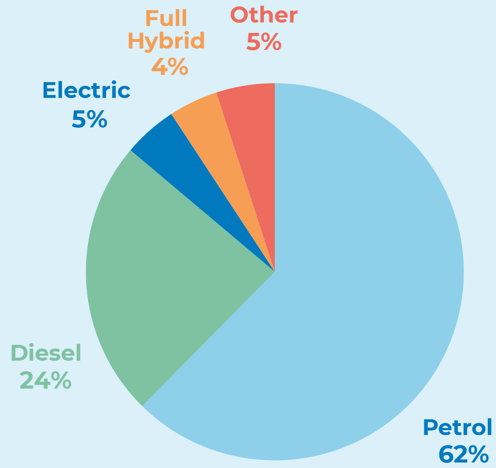
Vehicle Ownership

79%

79% of households in the TfSE region own at least one car, the same as the England average.

Driving licence holding is higher in the TfSE region than nationally, with 89% of adults holding some form of licence, compared with 75% in England.

Vehicle Ownership



EV Charging

In the TfSE region, the majority of EV charging takes place at home (63%). Most public charging takes place at service stations or charging hubs (11.3%) and workplaces or places of education (11%), reflecting the role of both en-route and destination charging. Public on-street chargers account for 7.2% of use, followed by business or organisation car parks (6.3%).

63%

Why people are travelling

30% **Leisure**

28% **Shopping**

17% **Commuting**

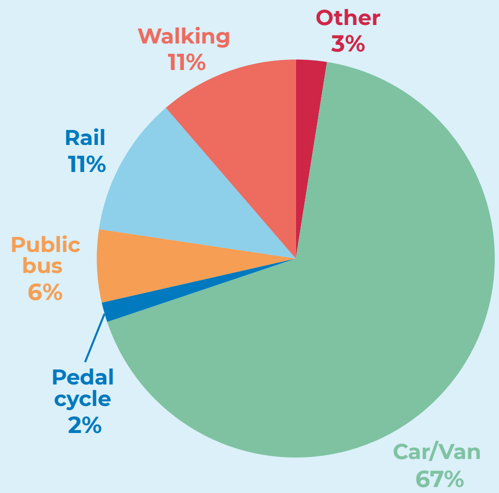
16% **Personal Business**

2% **Business**

2% **Education**

Leisure was the most common reason for travel in both the TfSE region and across England, although it plays a larger role regionally. Shopping trips accounted for 28% of all journeys in the TfSE region, compared with 18% nationally. Commuting was also more prominent in the region, making up 17% of trips compared with 12% across England. The TfSE region, however, saw lower rates of travel for education and business than nationally.

Commuting Mode Share



Compared with pre-pandemic levels, 41% of people report commuting about the same amount. However, a sizeable shift is evident as 42% of people have changed commuting habits. 21% commute a lot less and 12% a bit less, while 9% no longer commute at all despite previously doing so. In contrast, 17% report commuting more often, either a lot more (9%) or a bit more (8%), highlighting varying impacts of changing work patterns across the region.

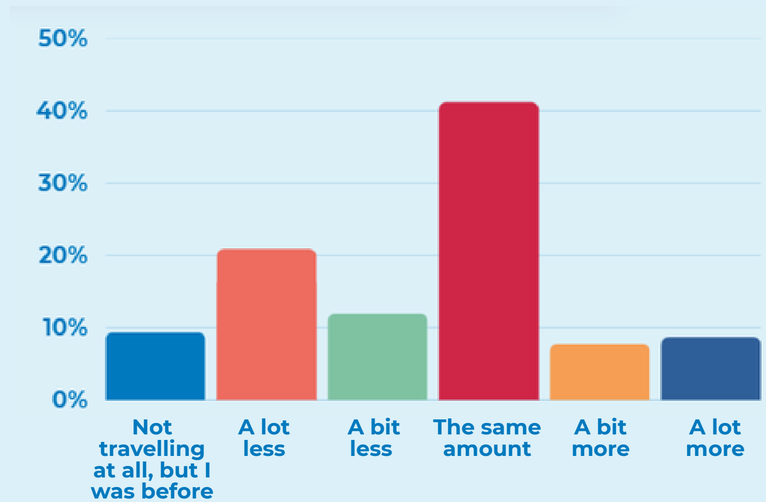
How people are commuting

In the TfSE region, commuting patterns are mixed, reflecting more flexible ways of working.

Commuter frequency in 2024

- **Everyday 35%**
- **At least once a week 42%**
- **At least once a month 8%**
- **Less than once a month 7%**
- **Never 8%**

Commuting Changes Since COVID



This fact sheet offers a short snapshot of selected findings from the RTS. While it highlights some key insights, the survey includes a much wider range of data, and full datasets can be provided on request. Please contact coe@transportforthesoutheast.org.uk for more information.

Regional Travel Survey: Sussex & Brighton

TRANSPORT FOR THE South East

The Transport for the South East Regional Travel Survey improves understanding of how people travel across the South East, and supports local transport planning. Aligned with the National Travel Survey, data was collected through extensive travel diary surveys, enabling more detailed analysis of local travel behaviour by local authorities. This factsheet summarises key travel patterns across Sussex & Brighton in 2024/2025. We have also created factsheets for the other areas in our region.

Average number of trips per person per year **948**

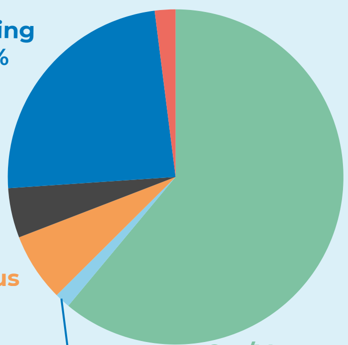
Overall, people in the area made a similar number of trips per year as the TfSE average (948 compared with 943) but travelled fewer miles each year (7800 miles compared with 8,900 miles). Despite recording the shortest average travel distance in the region, people in Sussex & Brighton still travelled further than the UK average.

How people are travelling

Average trip durations

- Cycle: **13-23 minutes**
- Car: **15-18 minutes**
- Walking: **19-23 minutes**

Trips by Mode



Travel in Sussex & Brighton is shaped by car use, however car use in the area (61% of trips) is closer to the England average (59%) than with the wider TfSE region (66%). The area also shows lower levels of walking and cycling than the national average. These trends provide important context for understanding travel behaviour across the region and the challenges and opportunities it presents.

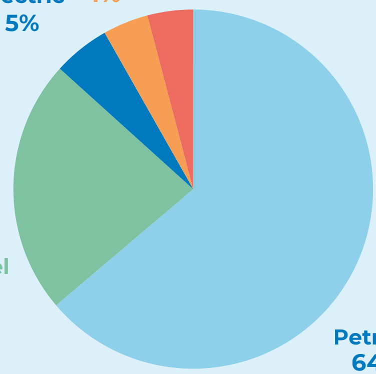
Vehicle Ownership

75%

75% of households in Sussex & Brighton own at least one car, which is lower than both the TfSE and England average (79%).

Driving licence ownership is higher in the area than nationally, with 86% of adults holding some form of licence, compared with 75% in England. However, the area sees the lowest rates of licence ownership in the TfSE region.

Vehicle Ownership



EV Charging

In Sussex & Brighton, most EV charging takes place at home (66%). Public charging mainly occurs at service stations or charging hubs (11%) and at public charging points (11%), which is slightly higher than in other areas of the TfSE region. Workplaces and places of education account for 6%of use, followed by business or organisation car parks (3%).

66%

Why people are travelling

32% Leisure

27% Shopping

17% Commuting

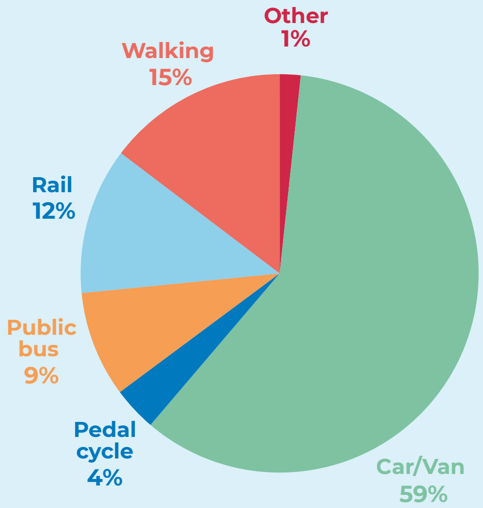
16% Personal Business

1% Business

2% Education

Sussex & Brighton follow similar trip-purpose trends to the wider TfSE region. Leisure was the most common reason for travel in both Sussex & Brighton and the TfSE region. Shopping accounted for 27% of all journeys in the area, compared with 18% nationally. Commuting was also more prominent, making up 17% of trips compared with 12% across England. However, Sussex & Brighton recorded lower rates of travel for education and business than the national average.

Commuting Mode Share



Sussex & Brighton generally follows the same trends as the rest of the TfSE region when comparing pre- and post-pandemic commuting patterns. Compared with pre-pandemic levels, 45% of people report commuting about the same amount. However, a sizeable shift is evident as 42% of people have reported commuting less. In contrast, 13% report commuting more often, which is slightly lower than the TfSE average.

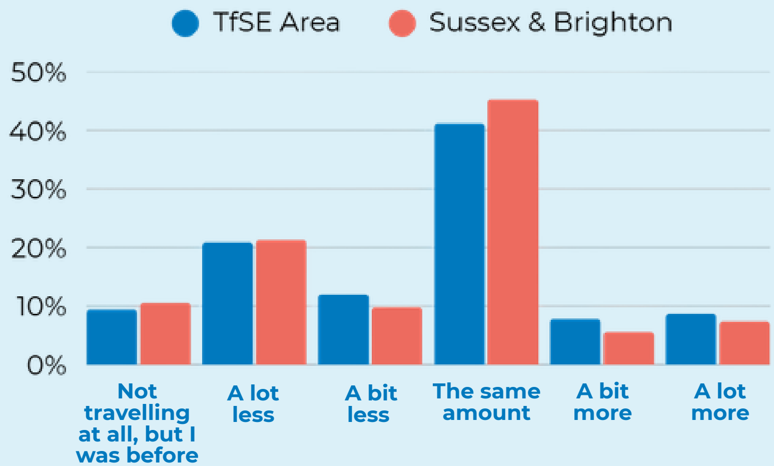
How people are commuting

Sussex & Brighton had the highest share of residents reporting that they never commute within the TfSE region.

Commuter frequency in 2024

- Everyday 36%
- At least once a week 41%
- At least once a month 8%
- Less than once a month 6%
- Never 9%

Commuting Changes Since COVID



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TRANSPORT FOR THE South East

Regional Travel Survey: Surrey

The Transport for the South East Regional Travel Survey improves understanding of how people travel across the South East, and supports local transport planning. Aligned with the National Travel Survey, data was collected through extensive travel diary surveys, enabling more detailed analysis of local travel behaviour by local authorities. This factsheet summarises key travel patterns across Surrey in 2024/2025. We have also created factsheets for the other areas in our region.

How people are travelling

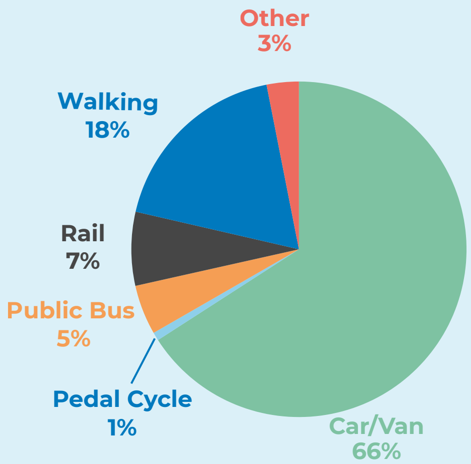
Average number of trips per person per year **948**

Overall, people in the county made a similar number of trips per year as the TfSE regional average (948 compared with 943) and travelled slightly further each year (8,970 miles compared with 8,900 miles). Both Surrey and the TfSE region travelled significantly further than the UK average.

Average trip durations

- 13-23 minutes
- 16-20 minutes
- 19-27 minutes

Trips by Mode



Travel in Surrey is strongly shaped by car use. Similarly to the TfSE region, car use accounts for a higher share of trips than the England average (59%). Surrey also reports lower levels of walking and cycling than the England average. These trends provide important context for understanding travel behaviour across the region and the challenges and opportunities it presents.

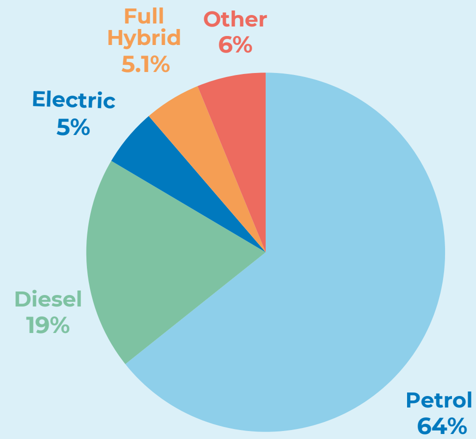
Vehicle Ownership

82%

82% of households in Surrey own at least one car, higher than the TfSE and England average (79%).

Driving licence ownership is considerably higher in Surrey than nationally, with 91% of adults holding some form of licence, compared with 75% in England.

Vehicle Ownership



EV Charging

In Surrey, the majority of EV charging takes place at home (65%). Most public charging takes place at workplaces or places of education (14%) and public charging points (8%), reflecting the role of both en-route and destination charging. Service stations or charging hubs account for 8% of use, followed by business or organisation car parks (5%).

65%

Why people are travelling

30% Leisure

27% Shopping

17% Commuting

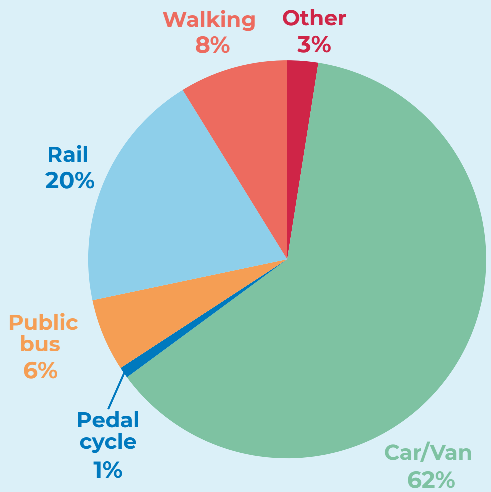
16% Personal Business

2% Business

3% Education

Surrey follows similar trip-purpose trends to the wider TfSE region. Leisure was the most common reason for travel in both Surrey and the TfSE area. Shopping trips accounted for 27% of all journeys in Surrey, compared with 18% nationally. Commuting was also more prominent, making up 17% of trips compared with 12% across England.

Commuting Mode Share



Surrey generally follows the same trends as the rest of the TfSE region when comparing pre- and post-pandemic commuting patterns. Compared with pre-pandemic levels, 40% of people report commuting about the same amount. However, a sizeable shift is evident as 45% of people describe commuting less. In contrast, only 15% report commuting more often, highlighting varying impacts of changing work patterns across the county.

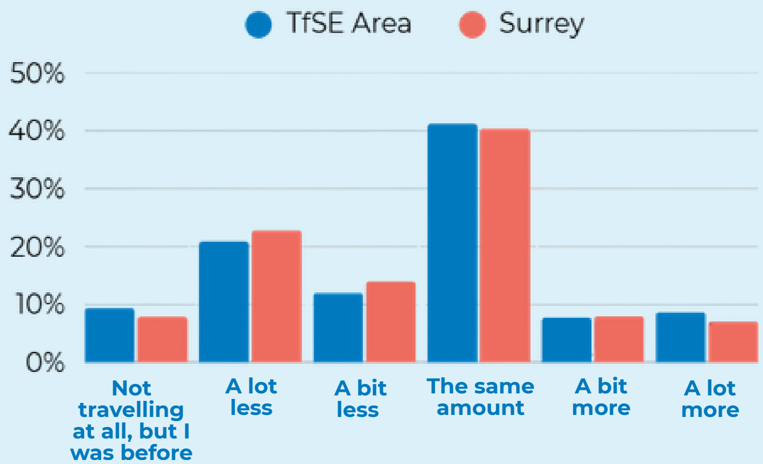
How people are commuting

Surrey has the lowest percentage of people who report commuting every day in the TfSE region (35%)

Commuter frequency in 2024

- Everyday 30%
- At least once a week 48%
- At least once a month 8%
- Less than once a month 7%
- Never 6%

Commuting Changes Since COVID



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TRANSPORT FOR THE South East

Regional Travel Survey: Berkshire

The Transport for the South East Regional Travel Survey improves understanding of how people travel across the South East, and supports local transport planning. Aligned with the National Travel Survey, data was collected through extensive travel diary surveys, enabling more detailed analysis of local travel behaviour by local authorities. This factsheet summarises key travel patterns across Berkshire in 2024/2025. We have also created factsheets for the other areas in our region.

Average number of trips per person per year **964**

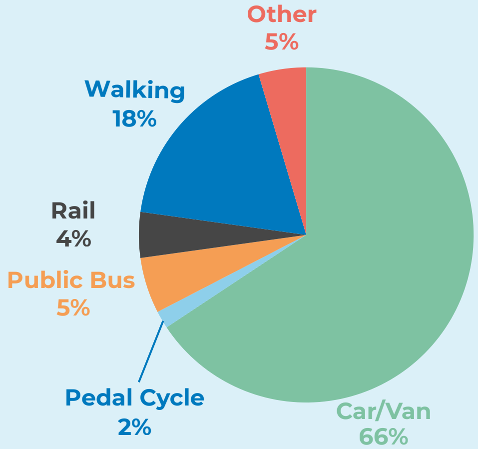
How people are travelling

Overall, people in the county made the highest number of trips per year in the TfSE region (964 compared with the TfSE average of 943) and travelled slightly further each year (8,960 miles compared with 8,900 miles). Both the TfSE region and Berkshire travelled significantly further than the UK average.

Average trip durations

- Cycling: **13-22 minutes**
- Car: **18-20 minutes**
- Walking: **21-26 minutes**

Trips by Mode



Travel in Berkshire is strongly shaped by car use. Similarly to the TfSE region, car use accounts for a higher share of trips than the England average. The area also shows lower levels of walking and cycling than the England average, in line with trends across the TfSE region. These trends provide important context for understanding travel behaviour across the region and the challenges and opportunities it presents.

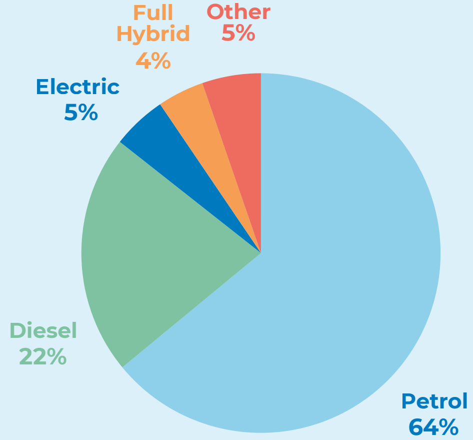
Vehicle Ownership

76%

76% of households in Berkshire own at least one car, which is slightly lower than the TfSE and England average (79%).

Driving licence ownership is higher in Berkshire than nationally, with 87% of adults holding some form of licence, compared with 75% in England.

Vehicle Ownership



EV Charging

In Berkshire, most EV charging takes place at home (57%), the lowest share in the TfSE region, suggesting a greater reliance on public charging. Public charging mainly occurs at service stations or charging hubs (13%) and at workplaces or places of education (13%). Public on-street chargers account for 9% of use, followed by business or organisation car parks (7%).

57%

Why people are travelling

30% Leisure

28% Shopping

17% Commuting

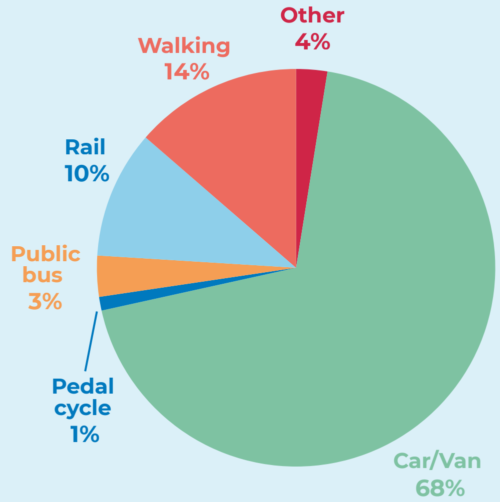
16% Personal Business

2% Business

3% Education

Berkshire follows similar trip-purpose trends to the wider TfSE region. Leisure was the most common reason for travel in both Berkshire and the TfSE area. Shopping trips accounted for 28% of all journeys in Berkshire, compared with 18% nationally. Commuting was also more prominent, making up 17% of trips compared with 12% across England. Like the rest of the TfSE region, Berkshire recorded lower rates of travel for education and business than the national average.

Commuting Mode Share



Berkshire is a slight outlier when looking at pre- and post-pandemic commuting patterns. Although it follows the same overall trends as the rest of the TfSE region, fewer people report commuting the same amount as before the pandemic (37% compared with the TfSE average of 41%). Berkshire also has a higher proportion of people commuting a lot more than they did pre-Covid, at 12%.

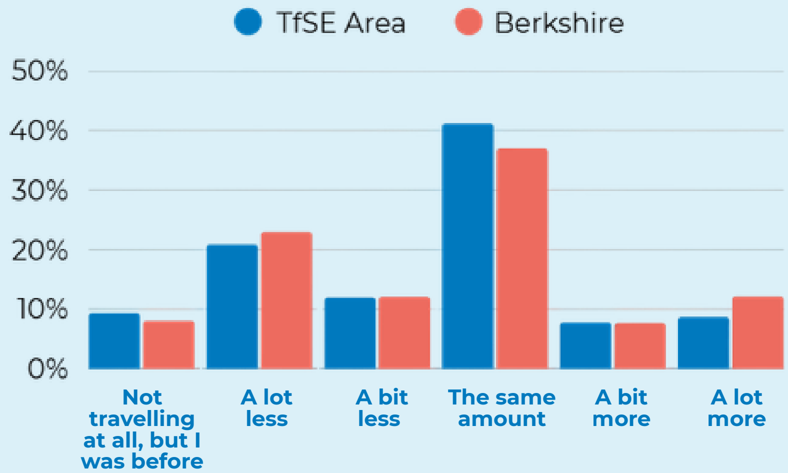
How people are commuting

In Berkshire, commuting patterns are mixed, reflecting more flexible ways of working.

Commuter frequency in 2024

- **Everyday 36%**
- **At least once a week 42%**
- **At least once a month 8%**
- **Less than once a month 7%**
- **Never 7%**

Commuting Changes Since COVID



This fact sheet offers a short snapshot of selected findings from the RTS. While it highlights some key insights, the survey includes a much wider range of data, and full datasets can be provided on request. Please contact coe@transportforthesoutheast.org.uk for more information.

TRANSPORT FOR THE **South East**

Regional Travel Survey: Hampshire and the Solent

The Transport for the South East Regional Travel Survey improves understanding of how people travel across the South East, and supports local transport planning. Aligned with the National Travel Survey, data was collected through extensive travel diary surveys, enabling more detailed analysis of local travel behaviour by local authorities. This factsheet summarises key travel patterns across Hampshire & the Solent in 2024/2025. We have also created factsheets for the other areas in our region.

Average number of trips per person per year **925**

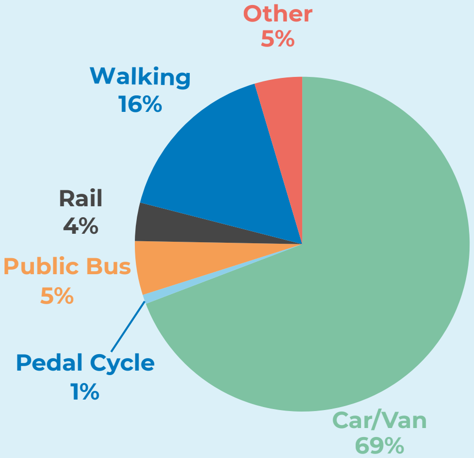
How people are travelling

Overall, people in the area made fewer trips per year than the TfSE average (925 compared with 943) but travelled significantly further each year (10,060 miles compared with 8,900 miles). This indicates that people are taking fewer but longer trips.

Average trip durations

- Cycling: **11-16 minutes**
- Car: **18-20 minutes**
- Walking: **20-25 minutes**

Trips by Mode



Travel in Hampshire & the Solent is strongly shaped by car use. 69% of trips in the area are made by car, the highest proportion in the TfSE region. The area also shows the lowest levels of walking in the region and one of the lowest levels of cycling. These trends provide important context for understanding travel behaviour across the region and the challenges and opportunities it presents.

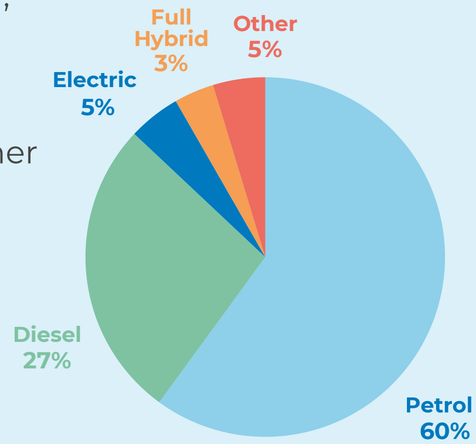
82%

Vehicle Ownership

82% of households in Hampshire & The Solent own at least one car, which is higher than both the TfSE and England average (79%).

Driving licence ownership is higher in Hampshire & The Solent than nationally, with 90% of adults holding some form of licence, compared with 75% in England.

Vehicle Ownership



EV Charging

In Hampshire & the Solent, the majority of EV charging takes place at home (58%). Most public charging takes place at service stations or charging hubs (14%) and workplaces or places of education (13%). Unlike the rest of the TfSE region, Hampshire & the Solent reports a higher share of charging at business or organisation car parks (10%), which is above the regional average.

58%

Why people are travelling

31% Leisure

29% Shopping

16% Commuting

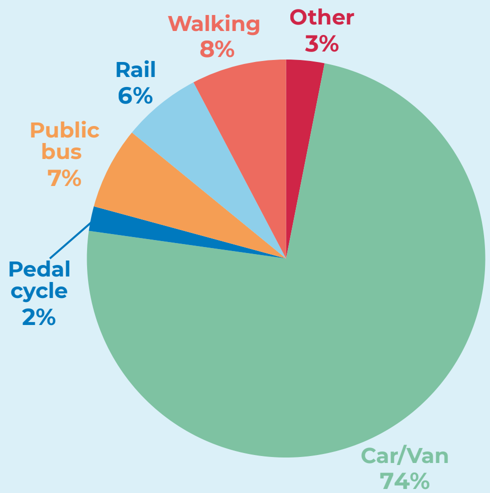
16% Personal Business

2% Business

3% Education

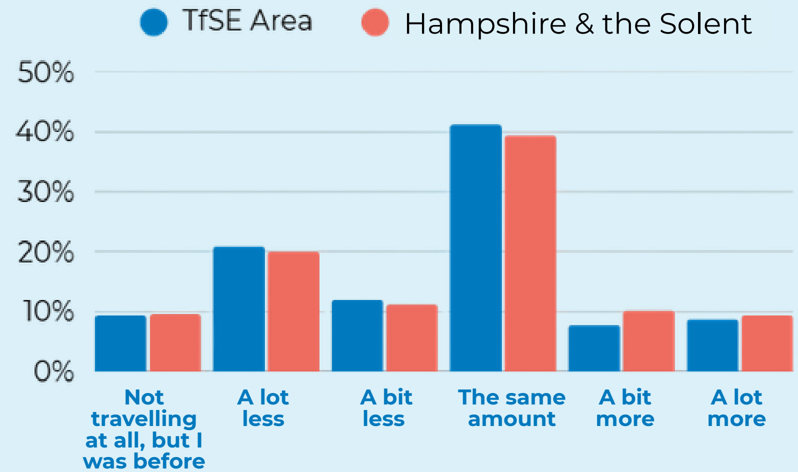
Hampshire & the Solent follows similar trip-purpose trends to the wider TfSE region. Leisure was the most common reason for travel in both areas. Shopping trips accounted for 29% of all journeys in Hampshire & the Solent, compared with 18% nationally. Commuting was also more prominent, making up 16% of trips compared with 12% across England.

Commuting Mode Share



Hampshire & the Solent generally follows the same trends as the rest of the TfSE region when comparing pre- and post-pandemic commuting patterns. Compared with pre-pandemic levels, 39% of people report commuting about the same amount, which is slightly below the TfSE average. A further 41% have reported commuting less. In contrast, 19% report commuting more often.

Commuting Changes Since COVID



How people are commuting

In Hampshire & the Solent commuting patterns are mixed, reflecting more flexible ways of working.

Commuter frequency in 2024

- **Everyday 36%**
- **At least once a week 42%**
- **At least once a month 8%**
- **Less than once a month 6%**
- **Never 7%**

This fact sheet offers a short snapshot of selected findings from the RTS. While it highlights some key insights, the survey includes a much wider range of data, and full datasets can be provided on request. Please contact coe@transportforthesoutheast.org.uk for more information.

Regional Travel Survey: Kent & Medway

TRANSPORT FOR THE South East

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Average number of trips per person per year **941**

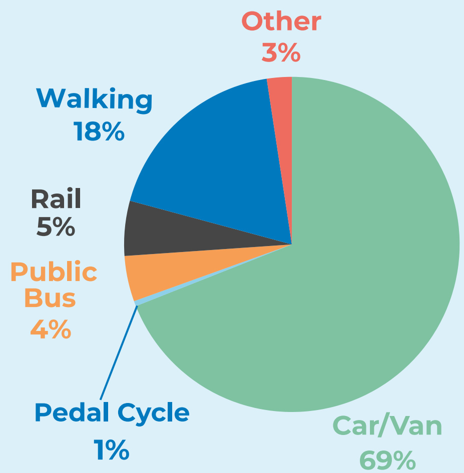
How people are travelling

Overall, people in the area made a similar number of trips per year as the TfSE average (941 compared with 943) and travelled slightly further each year (8,940 miles compared with 8,900 miles). Both the TfSE region and Kent & Medway travelled significantly further than the UK average.

Average trip durations

- Cycling: **13-23 minutes**
- Car: **17-19 minutes**
- Walking: **18-23 minutes**

Trips by Mode



Travel in Kent and Medway is strongly shaped by car use, which, similar to the TfSE region, accounts for a higher share of trips and distance travelled than the England average. The area also shows the lowest levels of cycling but the highest levels of walking within the TfSE region.

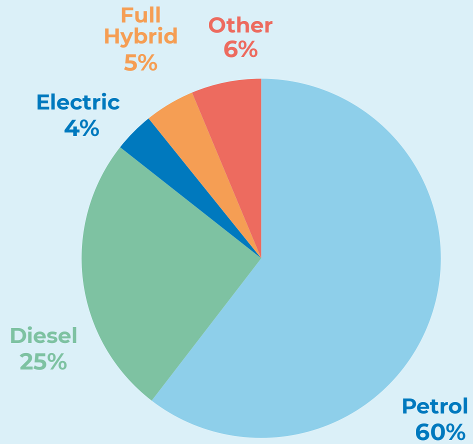
81%

Vehicle Ownership

81% of households in Kent & Medway own at least one car, slightly higher than the region and England average (79%).

Driving licence ownership in Kent & Medway is the same as the TfSE average, with 89% of adults holding some form of licence, compared with 75% across England.

Vehicle Ownership



EV Charging

In Kent & Medway, most EV charging takes place at home (67%). Public charging primarily occurs at service stations or charging hubs (11%) and at workplaces or places of education (10%), reflecting the importance of both en-route and destination charging. These findings are consistent with those across the TfSE region.

67%

Why people are travelling

28% Shopping

27% Leisure

19% Commuting

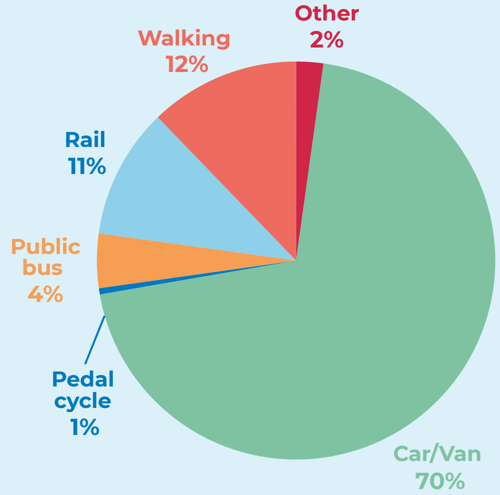
19% Personal Business

1% Business

2% Education

Shopping was the most common reason for travel in Kent & Medway, whereas leisure was the most common purpose in the rest of the TfSE region and across England. Commuting was slightly more prominent in Kent & Medway than both regionally and nationally, accounting for 19% of trips. However, Kent & Medway recorded the lowest rates of travel for education and business within the region.

Commuting Mode Share



Kent & Medway follows the same pre- and post-pandemic commuting trends as the wider TfSE region. Compared with pre-pandemic levels, 43% of people report commuting about the same amount. However, a sizeable shift is evident, with 42% reporting commuting less In contrast, 15% report commuting more often highlighting the varied impacts of changing work patterns across the region.

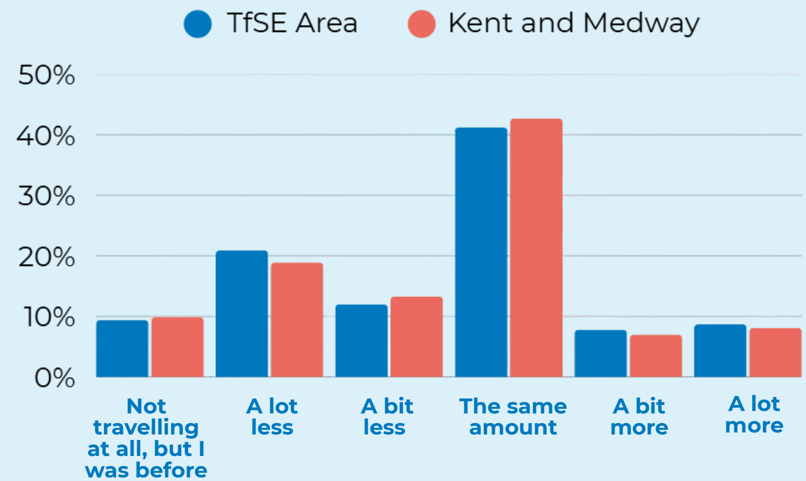
How people are commuting

Kent and Medway saw the highest percentage of people commuting every day in the TfSE region.

Commuter frequency in 2024

- Everyday **37%**
- At least once a week **40%**
- At least once a month **9%**
- Less than once a month **7%**
- Never **8%**

Commuting Changes Since COVID



This fact sheet offers a short snapshot of selected findings from the RTS. While it highlights some key insights, the survey includes a much wider range of data, and full datasets can be provided on request. Please contact coe@transportforthesoutheast.org.uk for more information.