TRANSPORTEAST

Rural Mobility Survey

Analysis Report February 2023

Introduction

The Rural Mobility Survey offers and insight into the perspectives of the region

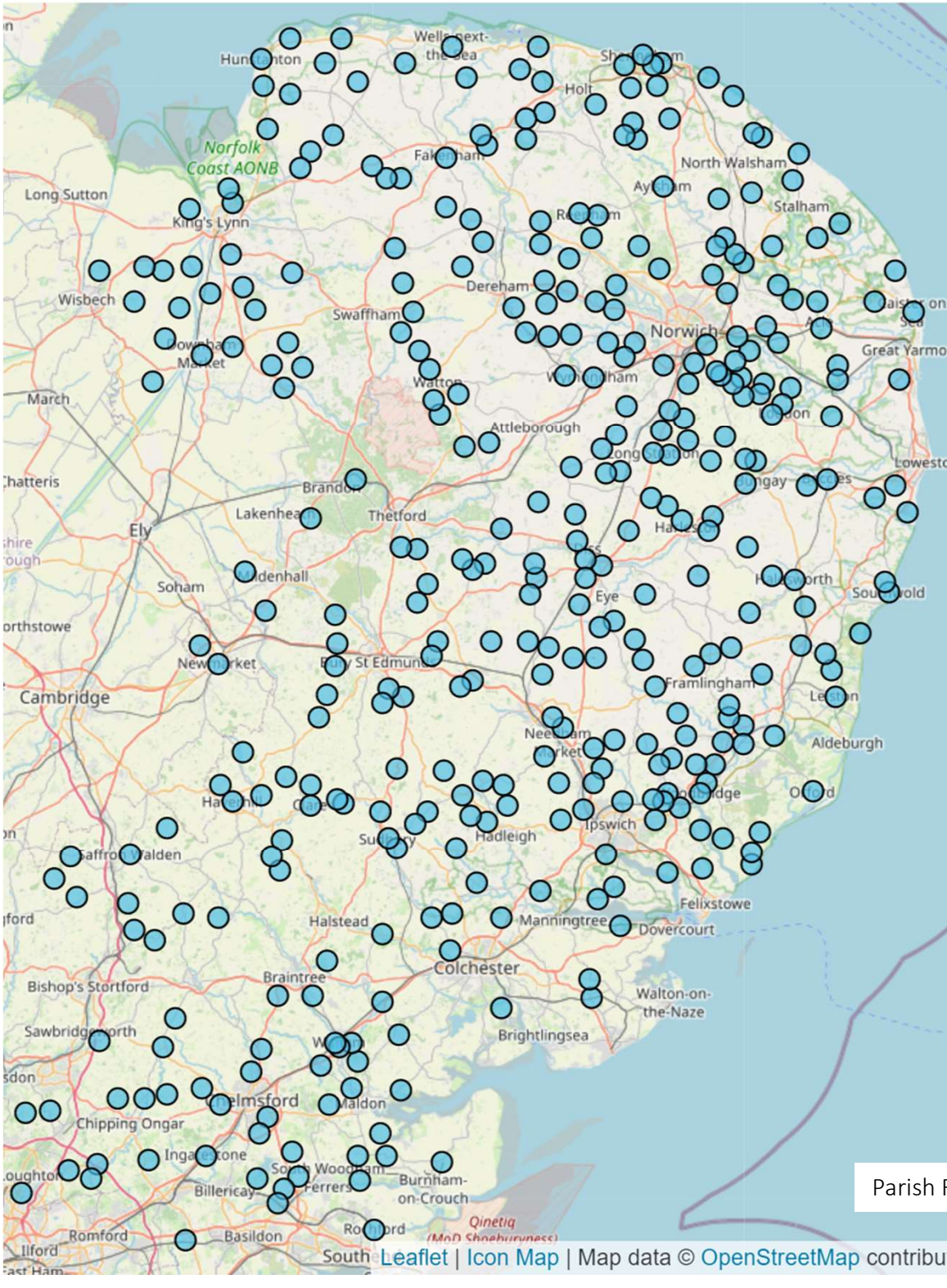
- At the end of 2022, Transport East reached out to over 1200 parishes covering the Norfolk, Suffolk, and Essex geographies
- The survey asked a range of questions on matters relevant to understanding transport needs and provision for each parish.
- The survey focused on understanding the following at a Parish level:
    - the **amenities and facilities** in each parish
    - the **transport services and infrastructure** present
    - opportunities to **improve transport outcomes** for the parish
- This presentation summaries and analyses the responses, and offers some further analysis to give context to the results
- A dashboard of the data has also been provided, to allow more interactive investigation and exploration of the data

Parish Boundaries

Response Overview

Responses were received from 372 parishes

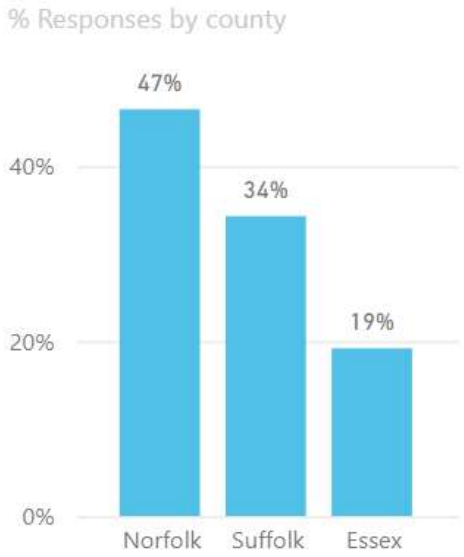
- Responses were well distributed across the region, however there was a lower response rate in parts of Essex
- This survey had 424 responses across 21 boroughs and 374 individual Parishes
- 36 parishes submitted multiple responses (79 in total), these have been consolidated and de-duplicated
- 7 responses were discarded as they didn't identify a parish in their response
- All data represents the views of the respondents and hasn't been edited in any way.
- Data in this report and the dashboard is aggregated and anonymised

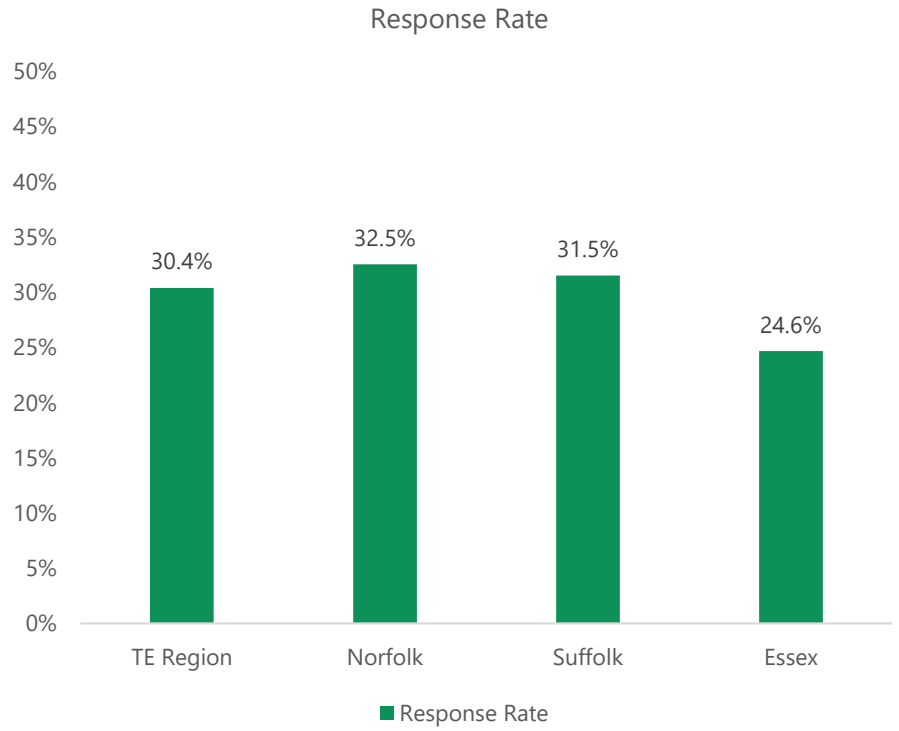


Response Rates

Response rates were good for a survey of this scale

- Over 1200 parishes were invited to take part (every parish in the region), and were asked to respond if they identified as a rural parish
- The proportion of responses received by county can be seen in the upper chart, with the response rate (responses/total parishes) on the lower
- Seven of the responses didn't specify a parish as part of their response – these have been excluded from the subsequent analysis
- The response rate was good for an online only survey across such a wide range of consultees
- The survey was targeted at each parish, with a request that a clerk submitted one response on behalf of the parish council
- The vast majority of respondees identified themselves as councillors, clerks, or administrators. Some responded with multiple roles. We are confident that the respondees are all official respondees on behalf of their parishes





Amenities and Facilities

Facilities by Parish

Parishes were asked about their local access to amenities

- The survey asked about the presence of a number of different types of amenities and facilities in the parish (the full list, as asked, is adjacent), with respondees selecting whether they had these amenities in the parish, and if not, where they travelled to obtain these amenities
- We have characterised these responses as yes or no responses, while many respondees did respond to the alternative locations question, the data was inconsistent and unsuitable for more quantitative analysis. We would recommend use of more categorial options for future surveys, or taking a more data driven approach (e.g. OpenStreetMap)
- Most respondees travel to their nearest larger town or city for amenities that they are unable to access in their immediate area (Norwich, Kings Lynn, Ipswich, Bury St Edmunds, Woodbridge, Cambridge, Colchester, and Harlow)

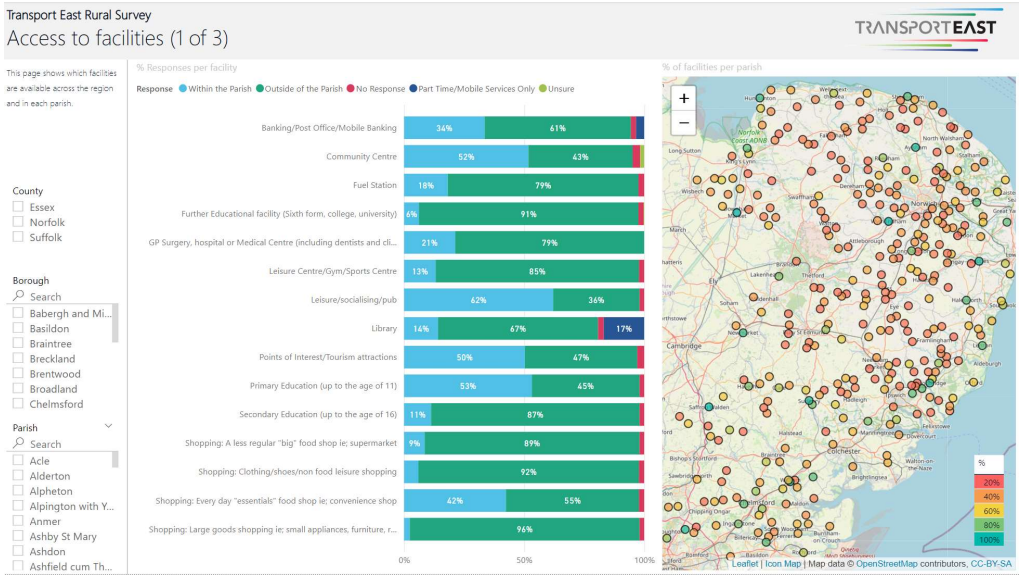
"Do you have … facilities in your parish or town?"

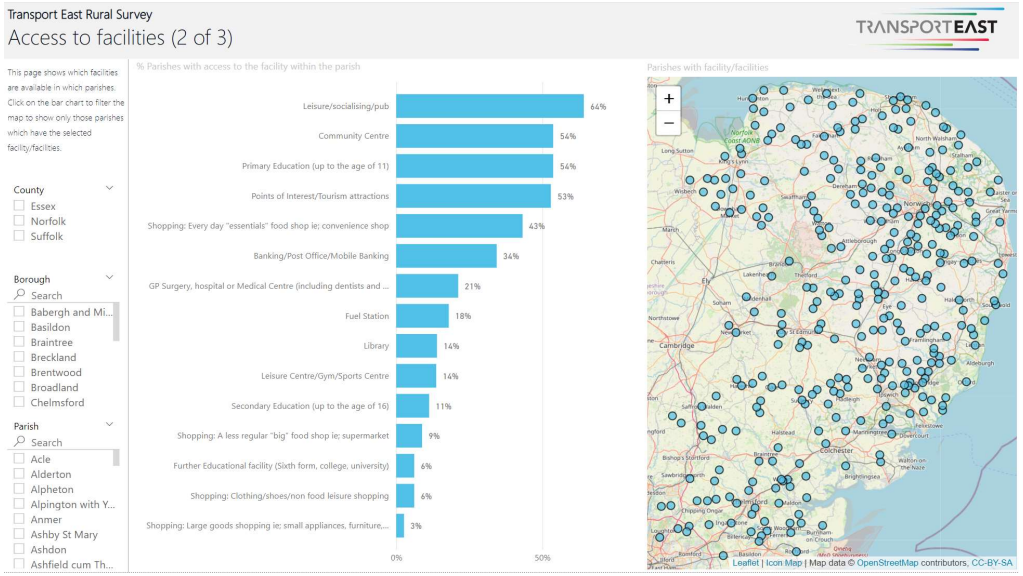
- Primary education
- Secondary education
- Further educational (sixth form, college, university)
- Banking / Post Office / Mobile Banking
- Fuel Station
- GP surgery, hospital or medical centre (including dentists and clinics)
- Every day "essentials" food shop i.e. convenience shop
- A less regular 'big' food shop i.e. supermarket
- Clothing/shoes/non-food leisure shopping
- Large good shopping i.e. small appliances
- Points of interest / tourism
- Community centre
- Gym / sports centre facilities
- Leisure / socialising/ pub
- Library

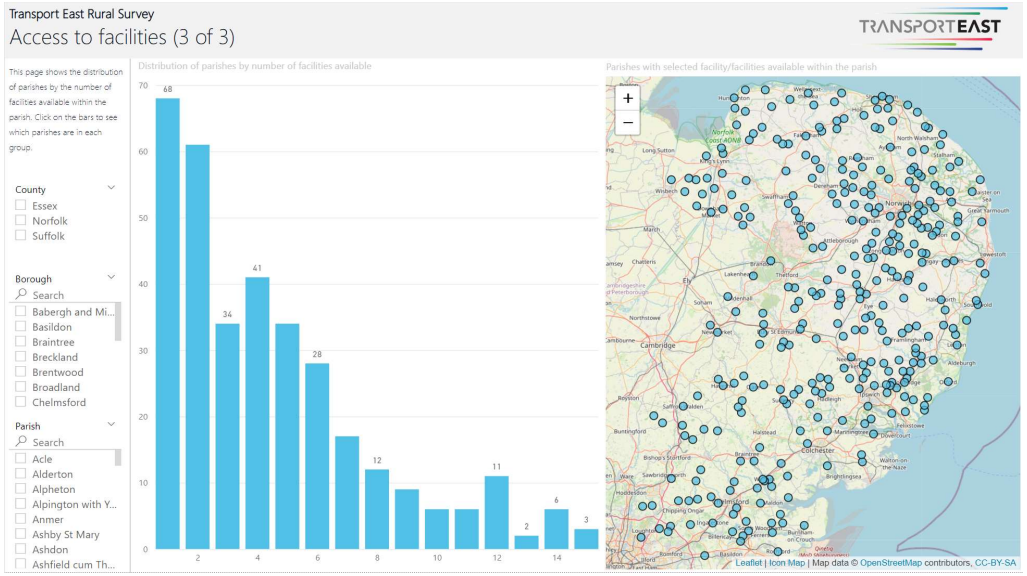
Facilities by Parish

Parishes were asked about their local access to amenities

- The full detail of which parishes responded positively for each amenity is available in the dashboard, with the ability to filter and explore interactively
- The following section highlights overall trends and some key observations for individual counties





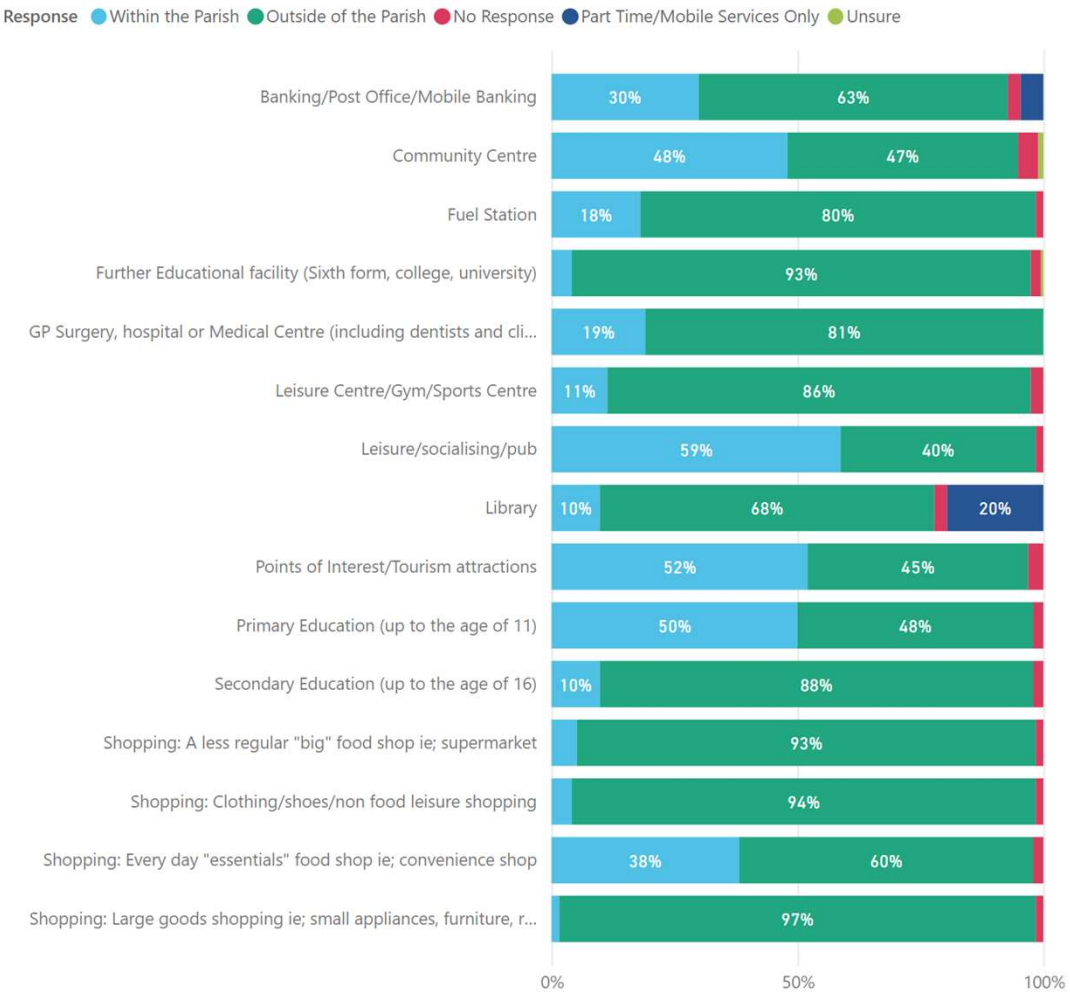


Parish facility

Regionally, there was a large spread of facility availability

- The lowest positive responses at a regional level were for infrequent retail (supermarkets, clothing stores, and large goods) and post-primary education
- Primary education was strongly represented (53% regionally), as secondary schools tend to be larger and have wider catchment areas
- Local social and leisure facilities are the most common facilities to find in an individual parish (63%)
- There is a similar trend for retail, with convenience stores being available in far more parishes (44%) than any other type of retail

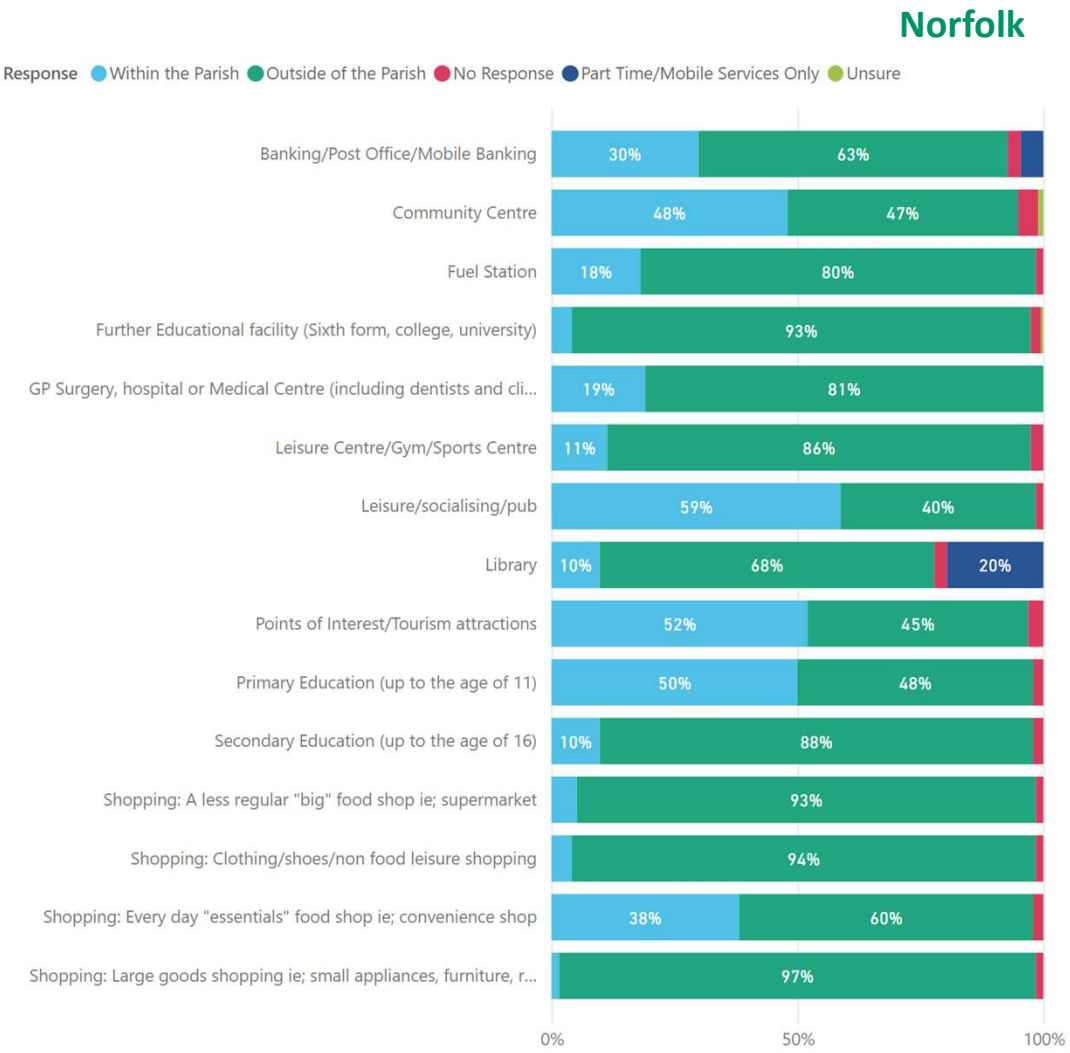
Whole Region



Parish facility availability

Norfolk had overall lower facility availability

- Compared to the regional numbers, Norfolk parishes had lower scores across all facilities, apart from tourist attractions. Tourist attractions were only marginally more common in Norfolk at 54% compared to 53% for the region
- Big food shops availability was markedly lower at 5% compared to 9% for the region

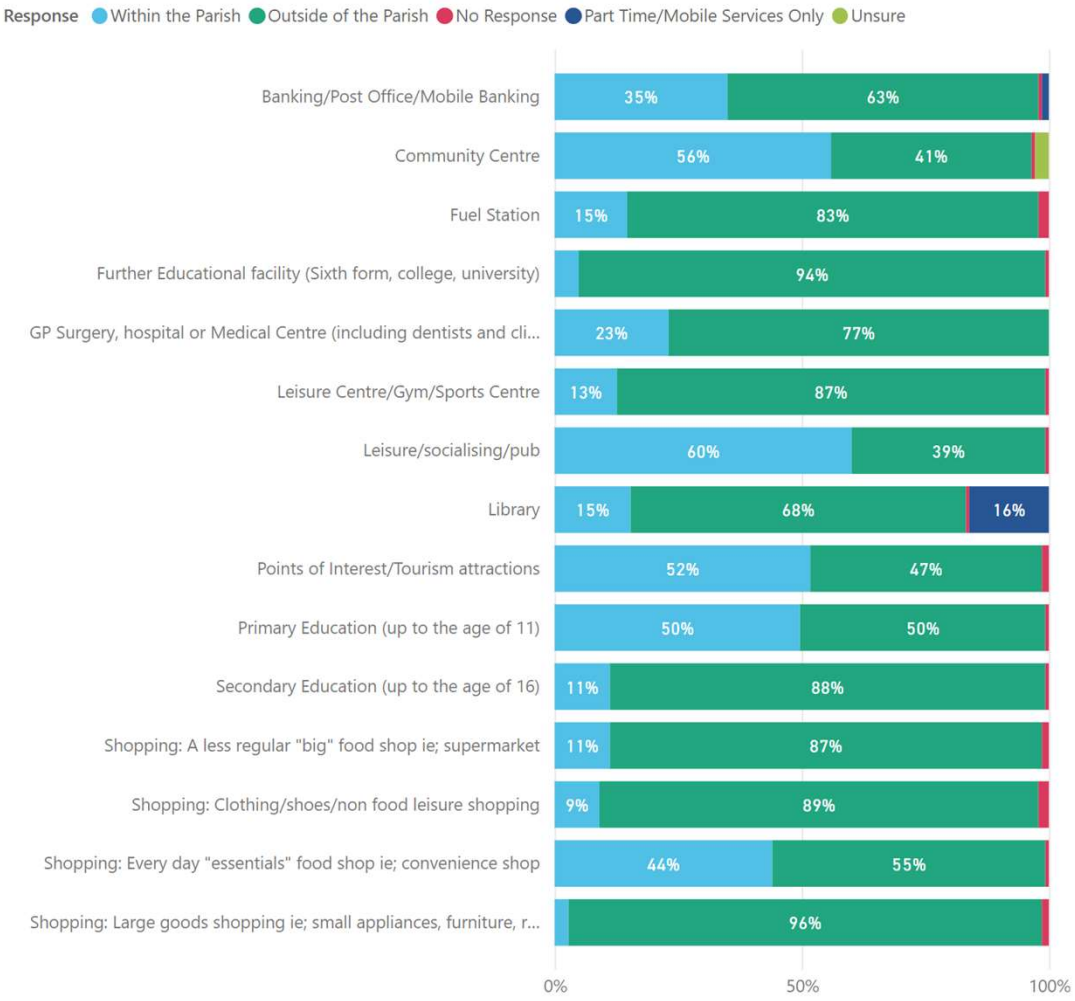


Parish facility availability

Suffolk consistently reflects this regional picture

- Suffolk had a mixed picture, with higher availability for facilities such as big food shops (11% compared to 9%), clothing shops (8% compared to 6%), and community centres (58% compared to 55%)
- However, there was markedly low availability of fuel stations (15% compared to 11%) and primary education facilities (49% compared to 53%)

Suffolk

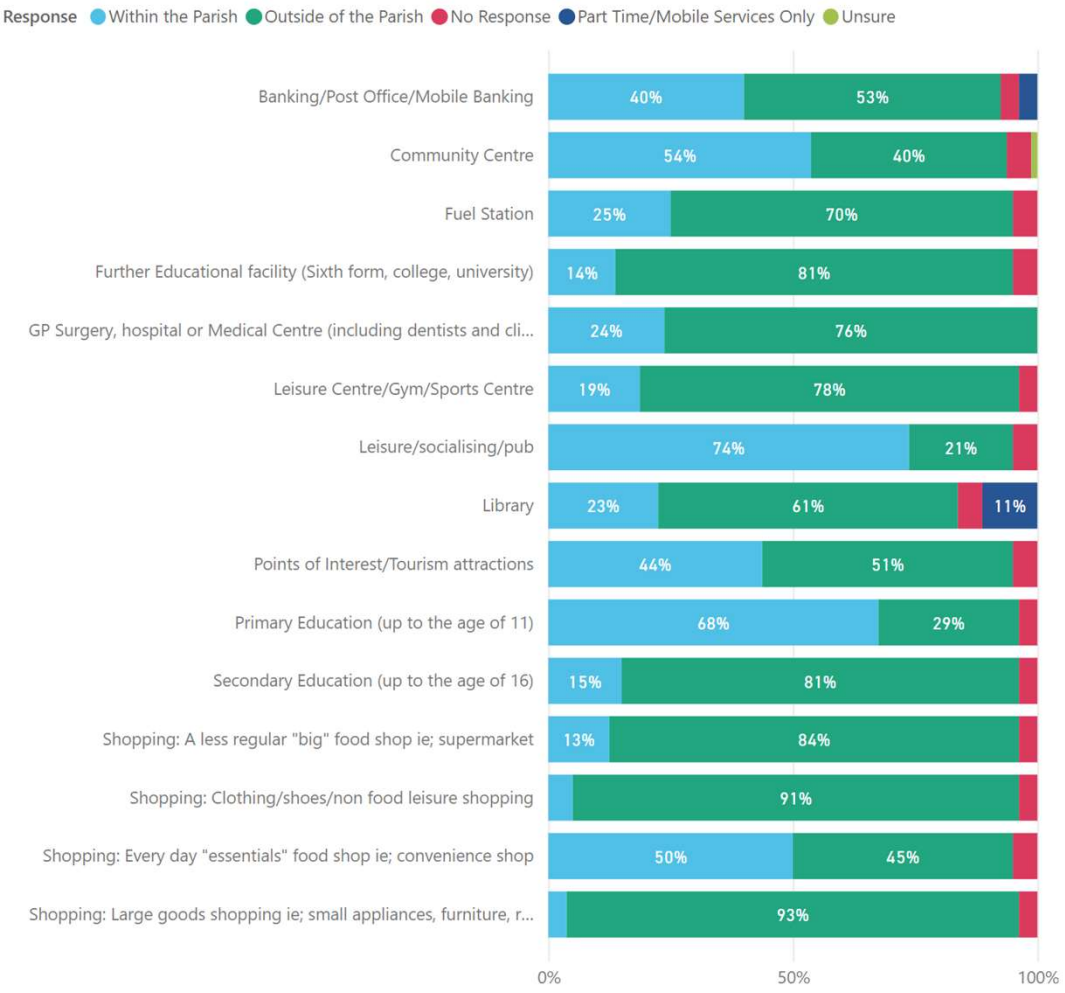


Parish facility availability

The pattern of facility availability is consistent across the counties

- The facility availability in Essex was higher in all categories apart from tourist attractions.
- We see a large disparity across a number of facility types. For example, primary education facilities (63% compared with 53%), leisure facilities (78% vs 63%), and essential food shops (54% vs 44%).

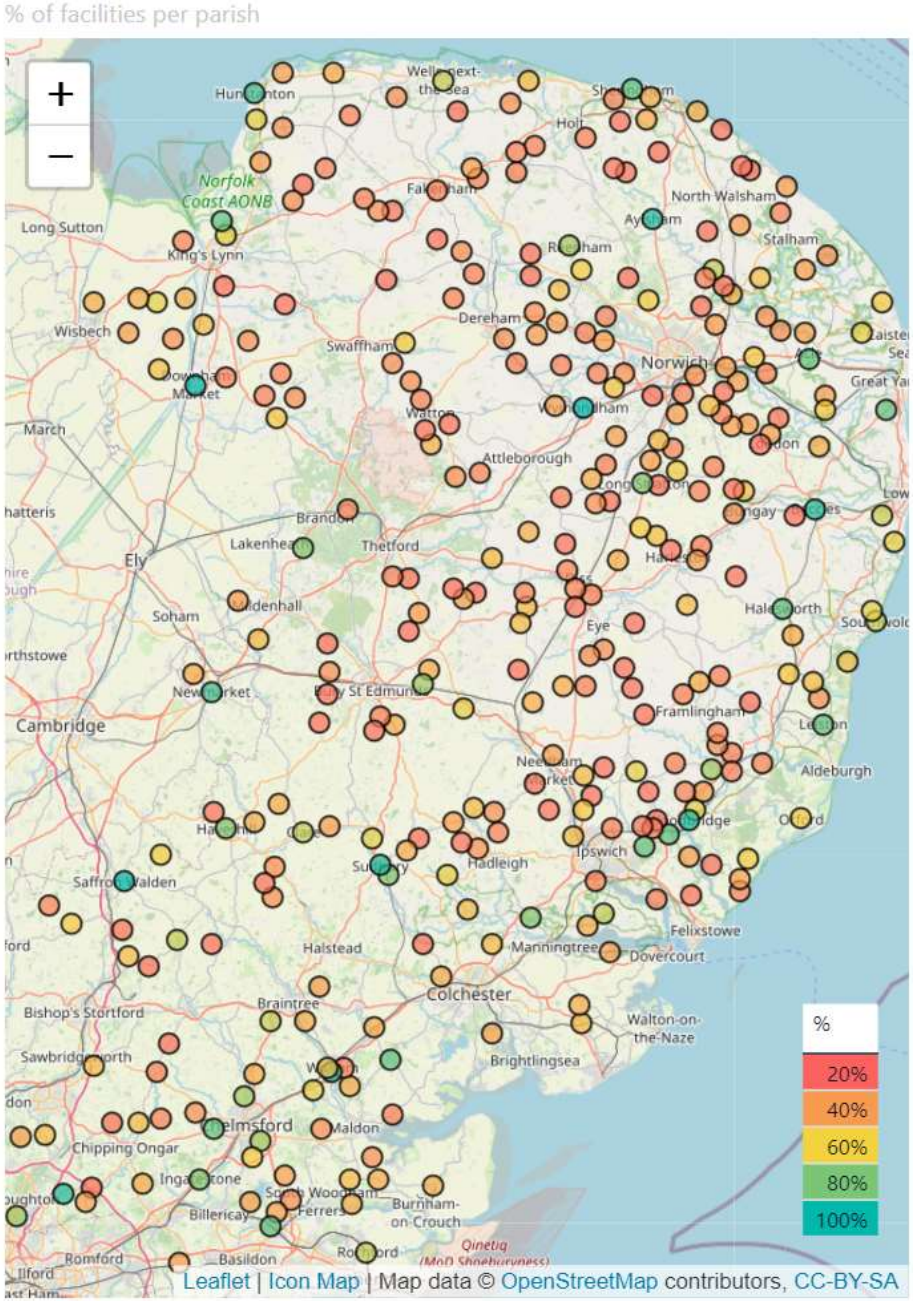
Essex



Parish facility availability

Regionally, there was a large spread of facility availability

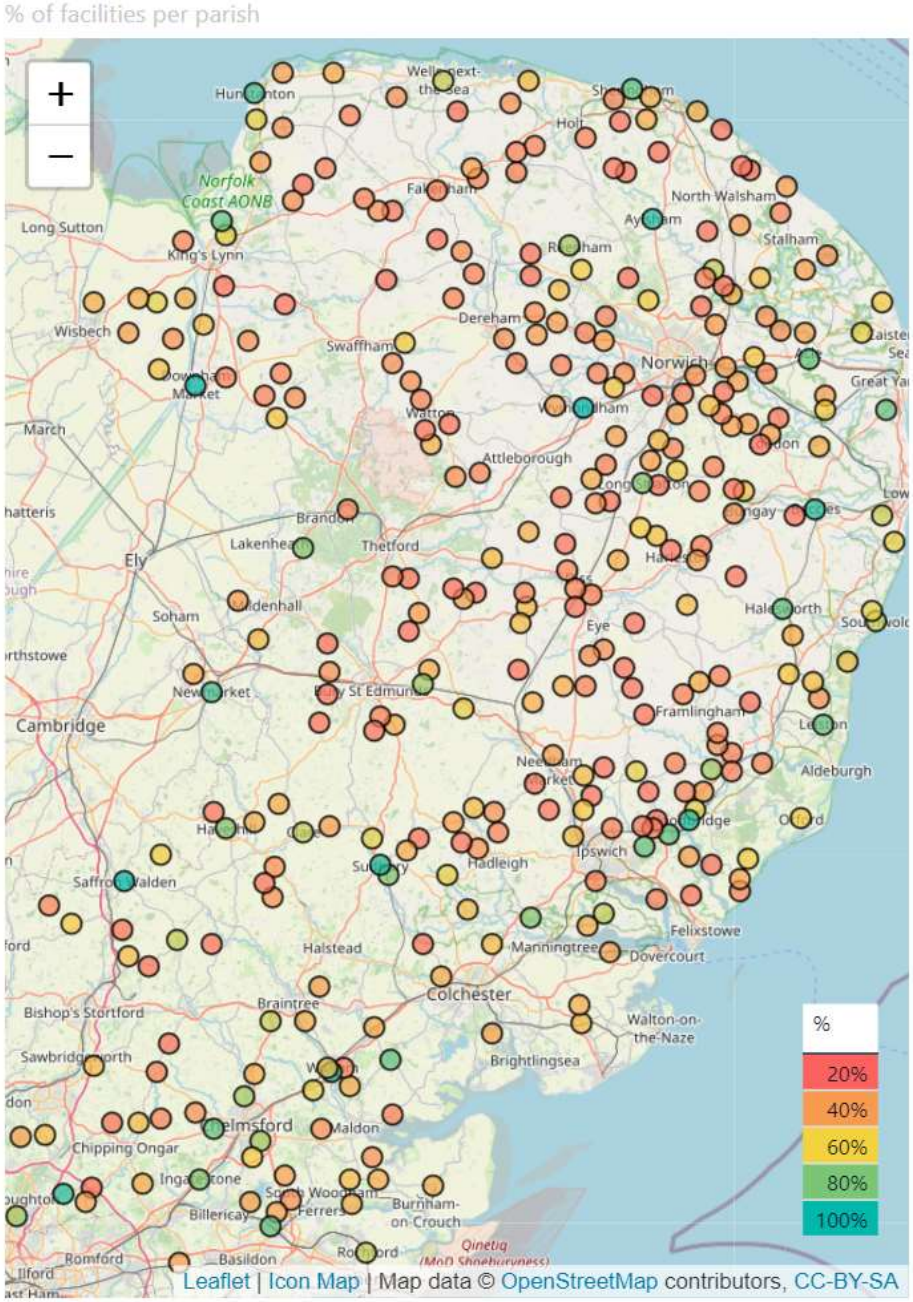
- The following pages show the location reported by each parish for the location of their nearest facilities of each type surveyed
- Most parishes provide for some of the daily needs of their residents, with a convenience store, local socialising, and community facilities being the most common amenities
- As expected, less frequently needed amenities are less prevalent in individual parishes, with consistent patterns across all parishes
- Education is worth highlighting as 53% of parishes have a primary school, but far fewer have secondary (11%) or further (6%) education facilities.
- Providing additional services via primary schools or community centres could offer greater opportunities within each parish
- It is worth noting that mobile library services are the most prevalent part time / mobile service. The uptake of these may provide a pattern for new amenities that could be shared across multiple parishes



Parish facility availability

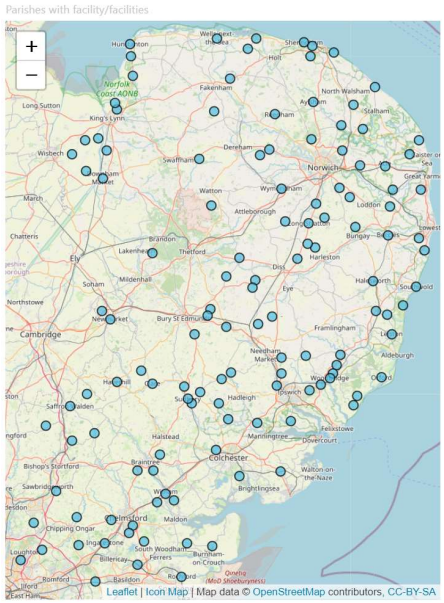
Transport will always be needed for rural parishes in the region

- Transport is how people access services and undertake the activities that enhance their lives and allow them to access new opportunities, in this way, available facilities in a location are as important as the provision of transport services
- We have seen in this section that regular travel is a day to day necessity in almost every parish who responded to the survey. Contrasting this with service provision across the region (in the next section), we have to consider the balance of new transport services and new facilities when thinking about how we improve outcomes for individual
- Additional shared / mobile facilities could help provide more local facilities more efficiently, and offer those with fewer transport options the ability to access more of their day to day needs without having to leave their parish



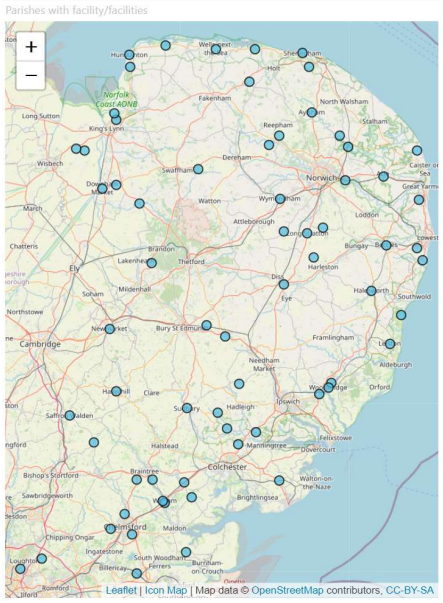
Parish facility availability

There are some interesting spatial patterns for some facility types



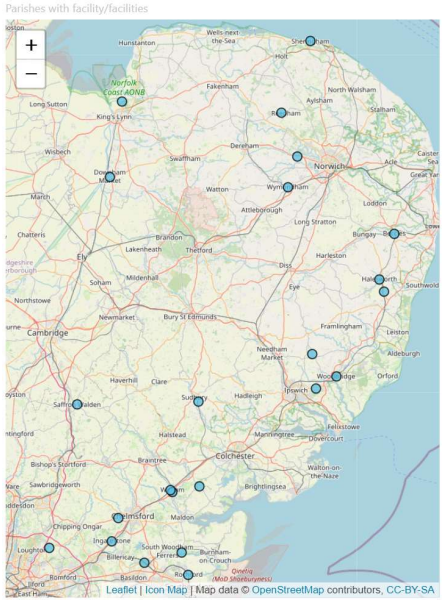
Banking

There is an even spread of banking facilities across the region



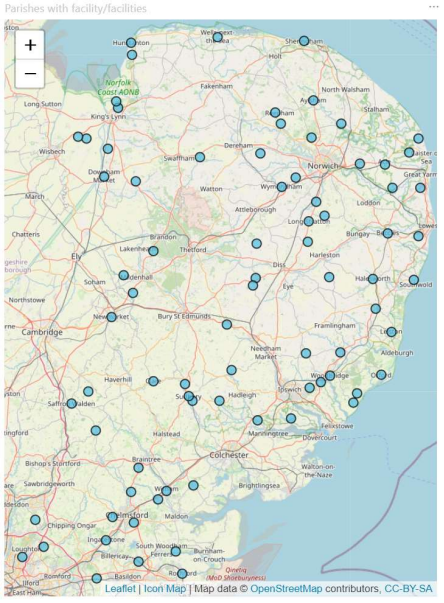
Fuel

Fuel amenities are generally very low across the region, and are focused on arterial roads



Higher Education

There is a higher concentration of parishes in Essex with access to higher education



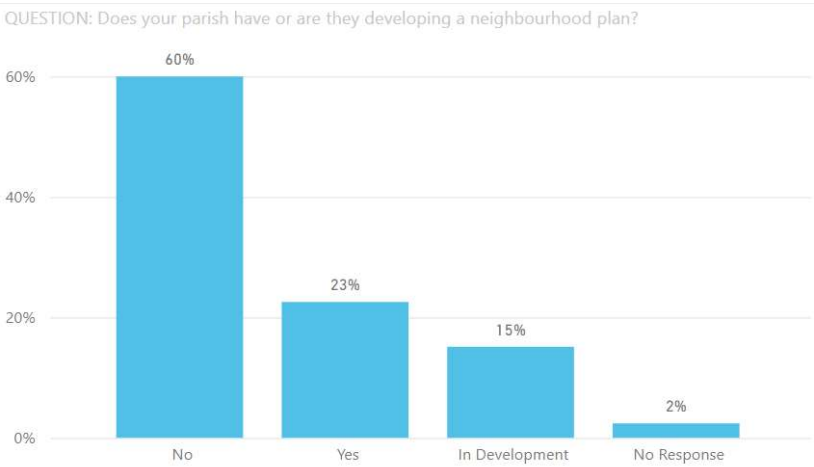
Medical

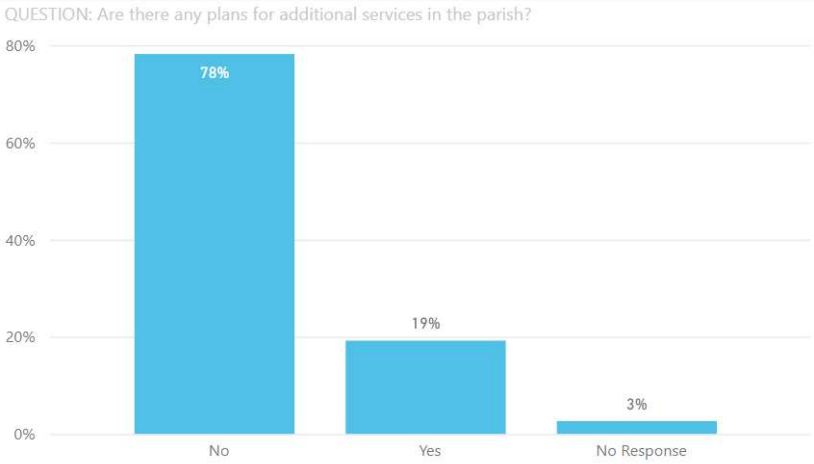
There is a lower concentration of medical facilities in Norfolk.

Future Amenities and Neighbourhood Plan

Despite some lower frequencies for some amenities, many parishes are not planning on expanding provision

- Parishes highlight recent growth as a driver for more facilities, with some reporting large numbers of new homes that have been built or are planned
- The lack of neighbourhood plans reduces the influence that local communities have in shaping the future development of the places where they live and work
- New proposed amenities align with existing provision, with convenience stores and community facilities the most common
- Most parishes don't have a neighbourhood development plan, which may make it harder to grow and develop services appropriate for both the individual parish and to coordinate across parishes
- There is an opportunity to support parishes in developing their neighbourhood plans, and facilitate coordination across neighbouring parishes





Transport services and infrastructure

Transport Infrastructure

Parishes were asked about their local transport infrastructure, with a focus on active modes and public transport

- The survey asked respondees to rate the quality of transport provision on a one to five scale as in the adjacent callout
- We have characterised these responses into:
    - Positive (a score of 4 or 5)
    - Neutral (a score of 3)
    - Negative (a score of 1 or 2)
- The following slides look at the relative performance of modes in the different counties, both in terms of absolute scores and of the positive / neutral / negative breakdown
- The phrasing of the question in the survey is likely to encourage lower scores since it is asking about facilities in the parish, this may have been interpreted by respondees as a requirement to have specific stops or stations in their parishes to give a higher score

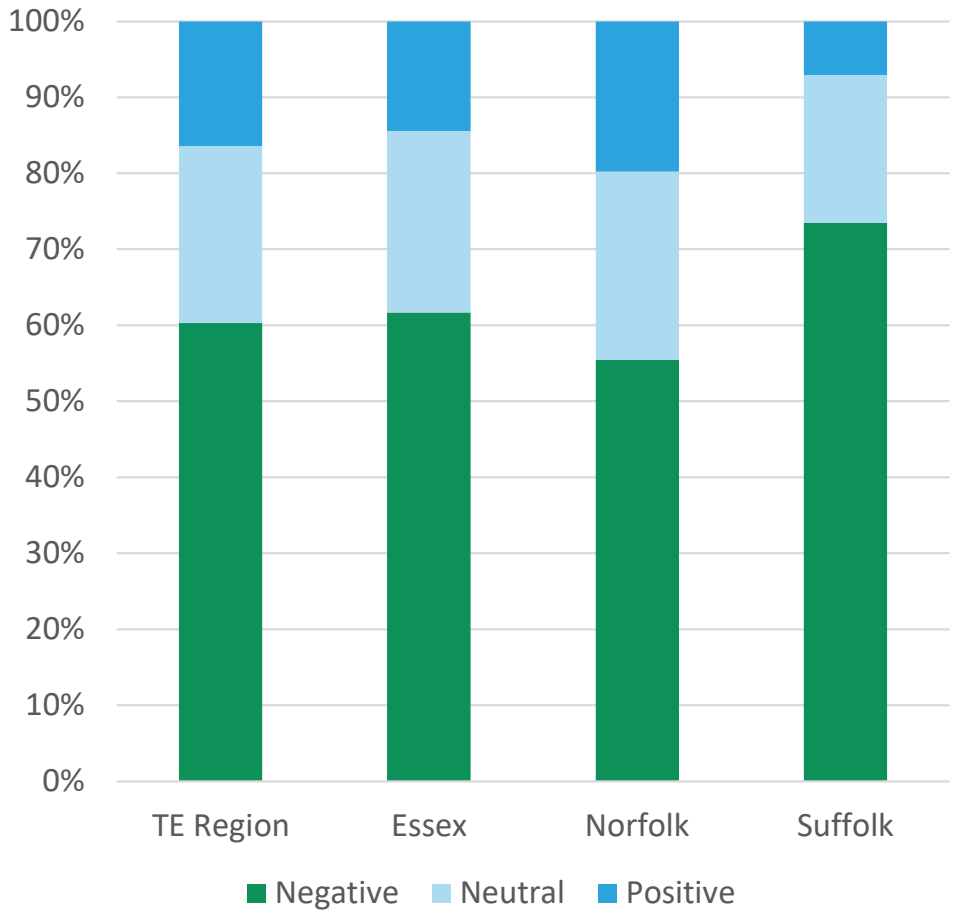
"Please rate the below transport facilities in your parish? 1 Very Poor to 5 Very Good"

- Access to buses
- Access to rail
- Access to community transport
- Walking facilities (on and off road)
- Cycling facilities (on and off road)

Infrastructure Quality

Transport infrastructure perceptions show consistent patterns across the region

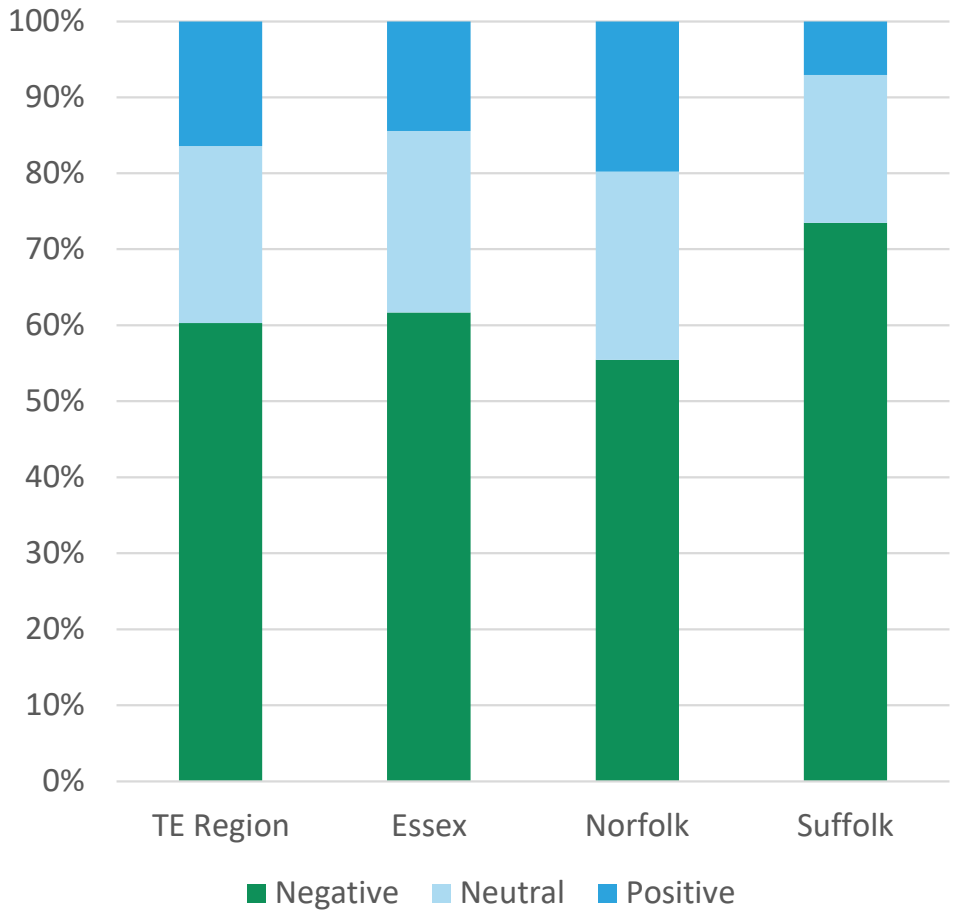
- Overall scores highlight that the perception of transport within parishes is low, with average scores being below the mid-point of the scale
- The overall scores for transport infrastructure in the region may not look encouraging at first glance, with all scores under the neutral 3. However, there were no questions about road / driving infrastructure, which is the most prevalent across the region. Therefore, overall infrastructure scores may be reduced.
- When looking by region, we see similar patterns in the perception of transport: Walking facilities are rated highest, then cycling, with bus and rail performing least well. This is encouraging from an active travel perspective
- Analysing by mode, we see these patterns played out, with rail performing the worst in all counties besides Essex, where it performs much better. This is likely due to the larger prevalence of arterial rail routes into London



Mode Spotlight: Bus

Access to bus is perceived negatively by responding parishes

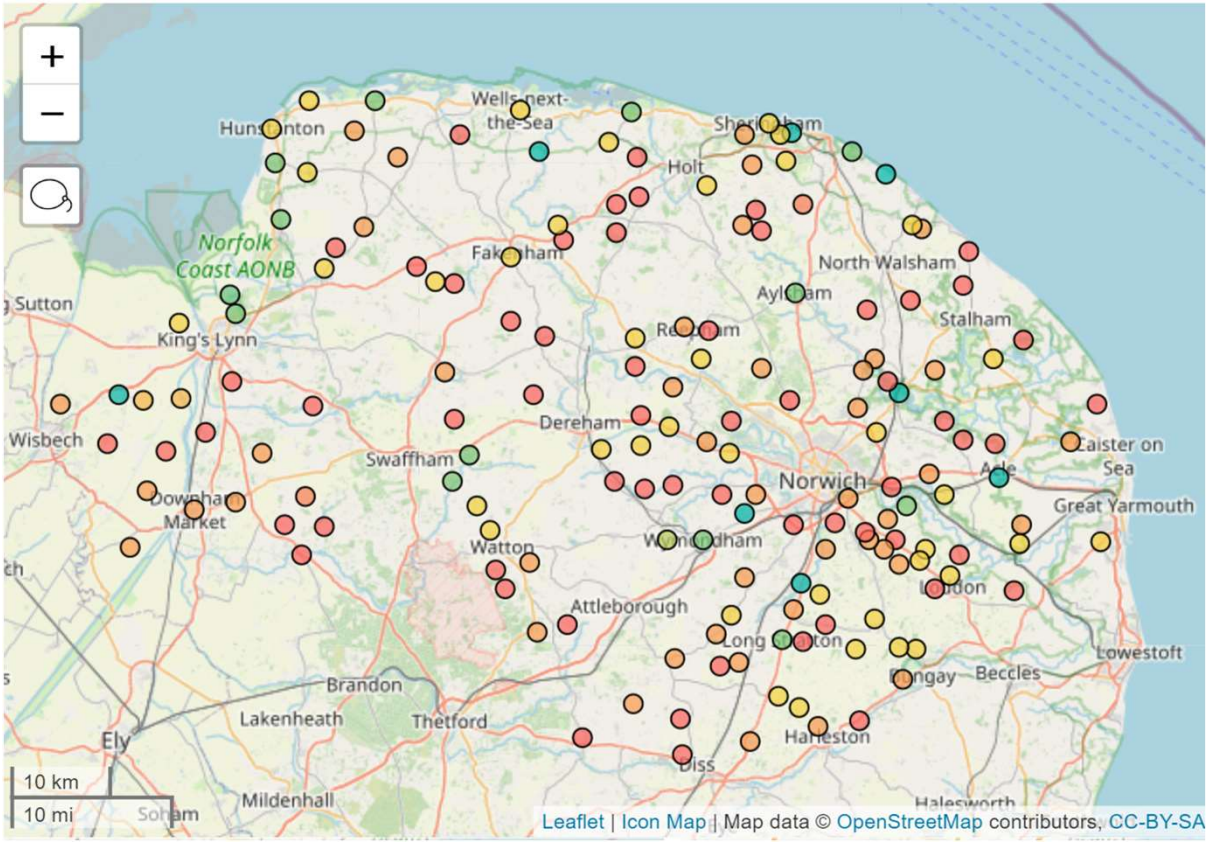
- As a mode, bus is poorly perceived across the region, with only 10% of respondees having a positive view of their parish's access to bus. Given the rural nature of the survey, respondents are most likely to be from parishes with lower bus provision.
- This is particularly low in Suffolk, which may indicate opportunities to impact some smaller communities.
- Bus scores very poorly across the region, with a specifically poor performance in Suffolk.
- With the renewed focus on bus nationally, through the Bus Service Improvement Plan, and the recently launched Bus Centre of Excellence, there are opportunities to use some of these insights to help strengthen the case for bus investment in the region.



Bus perception vs. service provision

Norfolk has some positive corridors of bus perception

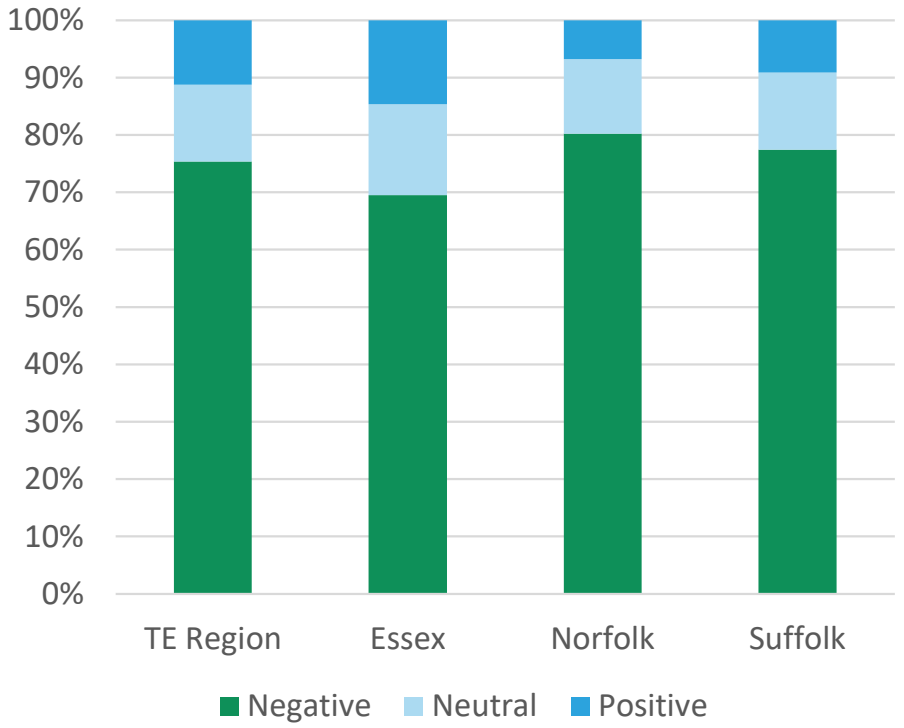
- There's a pattern of higher scoring parishes along the northern Norfolk coast, spanning from Kings Lynn towards Cromer
- This corresponds to the CoastLiner & CoastHopper services that run in the area
- It is positive to see that a small number of services is able to shift perception noticeably, provided they are accessible and relevant to the local community
- This map is available interactively in the dashboard



Mode Spotlight: Rail

Rail perception is likely skewed by proximity to services

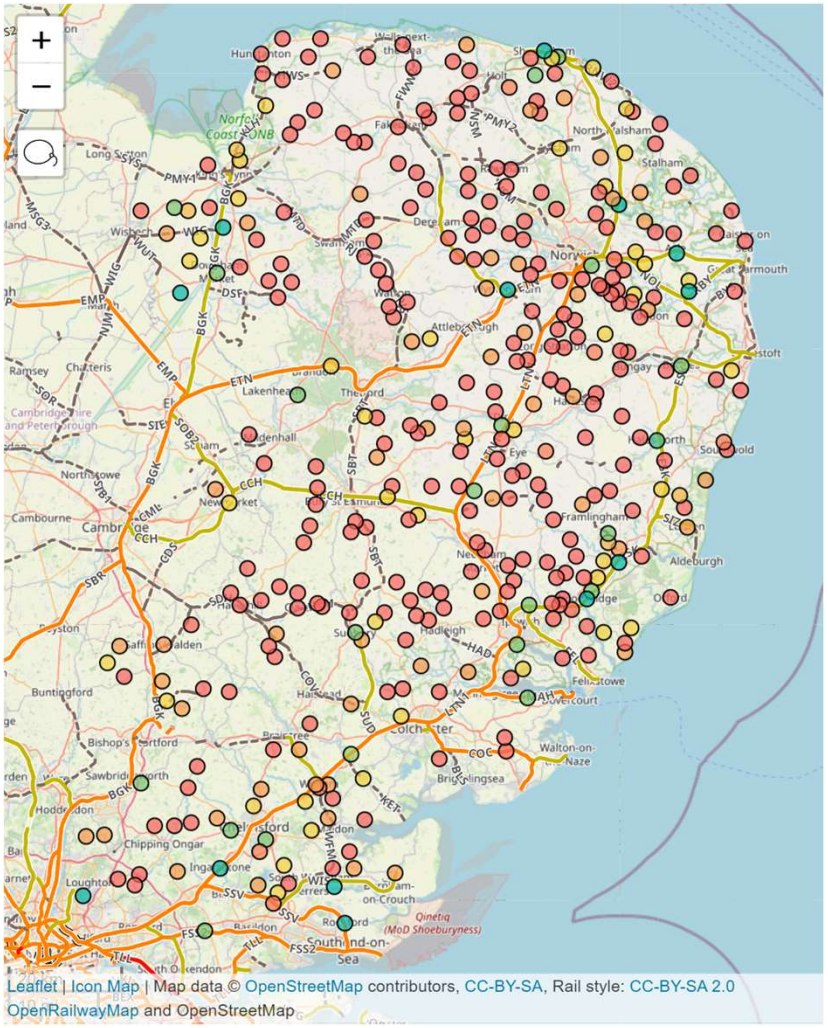
- The Transport East region has a number of challenges with a lower number of routes and services across the region
- Rail is perceived most favourably in Essex, however even there, only 19% of respondees have a positive view of their rail facilities, compared to 11% regionally
- As suggested previously, the wording of the question may have encouraged many to answer with a lower score, as many parishes don't have a railway station within them, even if they may have access to rail in a nearby town or parish
- Stations are also less likely to be in areas that would be considered as rural, so the focus of this survey and respondees are less likely to be close to a station



Rail perception vs. service provision

Rail perception is likely skewed by proximity to services

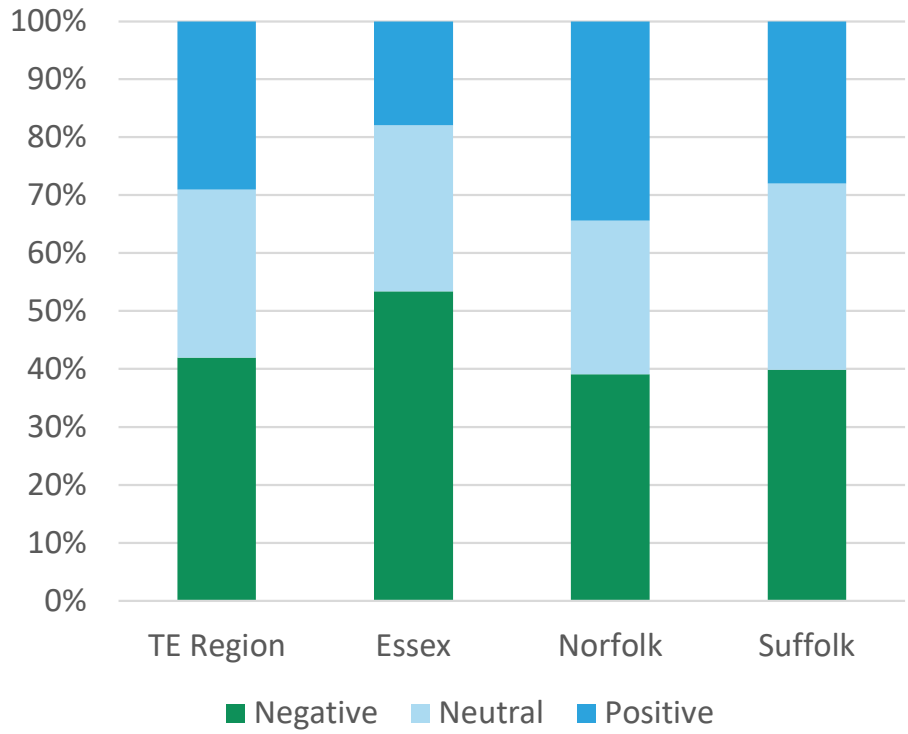
- Perception of rail is correlated with the proximity and quantity of stations
- Essex is the county best served by rail
- Essex has 58 rail stations, Norfolk 31, Suffolk 25, Southend-on-Sea 9, and Thurrock 7 (Office of Road and Rail, March 2022)
- This pattern is consistent with the perceptions in the survey, with the counties with the highest number of stations having the most favourable view of rail as a mode of transport



Mode Spotlight: Walking

Walking facilities are regarded positively across the region

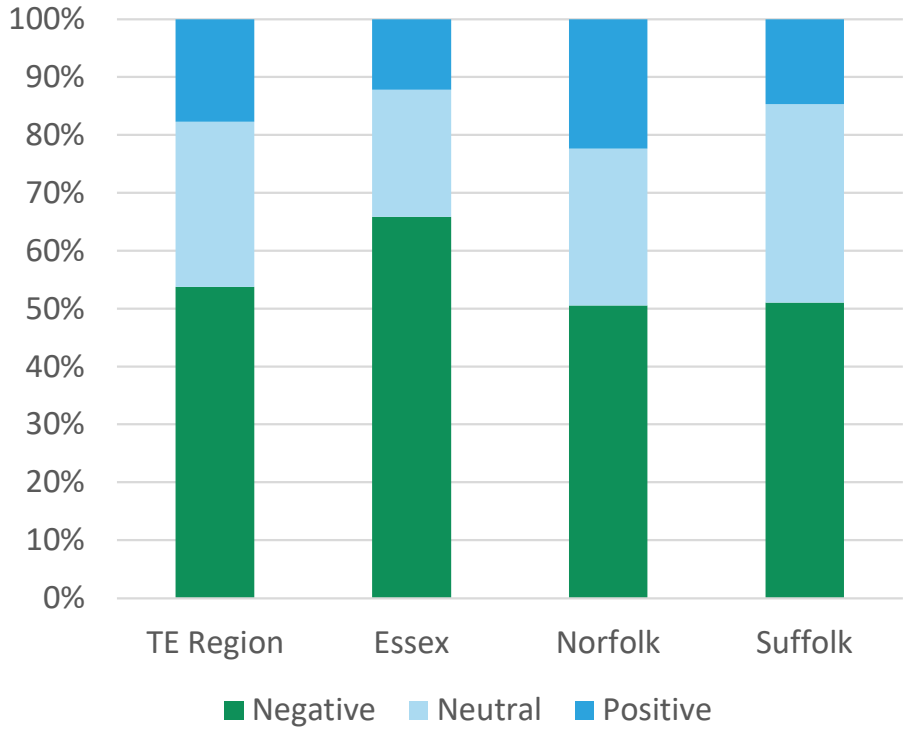
- Walking is the best perceived mode, with over 60% of people regionally having a non-negative view of the infrastructure in their parish
- All counties except Essex have a majority of respondees with a positive view of the walking infrastructure available to them
- The region has a large number of high quality walking routes, including routes such as the Norfolk and Suffolk Coast Paths and the Angles way
- There is a real opportunity to capitalise on what is seen as high quality walking infrastructure to promote more sustainable travel in the region



Mode Spotlight: Cycling

Cycling is also well regarded, but perception may be impacted by sharing the road with cars

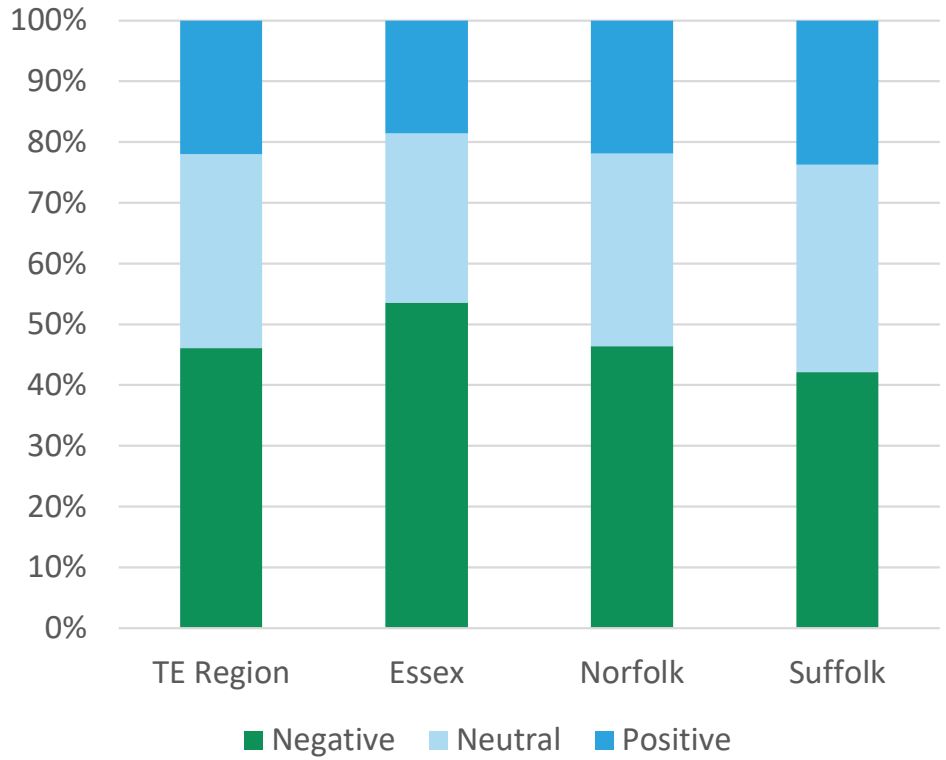
- Cycling infrastructure is less well regarded than walking infrastructure across the region.
- We hypothesise that this is likely due to there being more ‘off road’ walking routes that walkers have access to, whereas cycling in the region is predominantly ‘on road’
- Respondees were more positively disposed to cycling infrastructure than they were to either of the public transport modes that were part of the survey
- These findings could be combined with other data on cycle perception, propensity, and infrastructure (e.g. Active Lives survey) to make the case for investment.



Mode Spotlight: Community Transport

Community transport is well regarded and could offer an effective solution for more areas

- Similarly to walking, community transport is more of a positively perceived mode. All counties except Essex have a majority of respondees with a positive view of the community transport available to them
- Suffolk has the majority positive leaning view with the largest neutral and positive responses
- Community transport appears to play a particularly large role in rural communities especially for those with accessibility issues or lack of access to vehicles
- There may be significant opportunity to increase community transport provision in areas which may not be viable for new bus services



Transport issues and improvements

Transport Related Issues and Improvements

Parishes were asked about issues caused by their local facilities, and how their transport could be improved

- The survey asked respondees to identify issues created in their parishes by their local amenities, opportunities for electric vehicle charging, and more generally how transport could be improved in their parish
- These questions reveal some insights into the dominant mode across the region, i.e. private cars, as we gain some understanding of parking challenges and potential for electric vehicles
- The final question was a free text field on which we have used a technique called 'topic modelling', pulling out combinations of words and phrases to understand common themes

"Do any of the facilities or points of interest [in the parish] create transport related issues in the area?"

"What levels of parking are available in the parish for residents?"

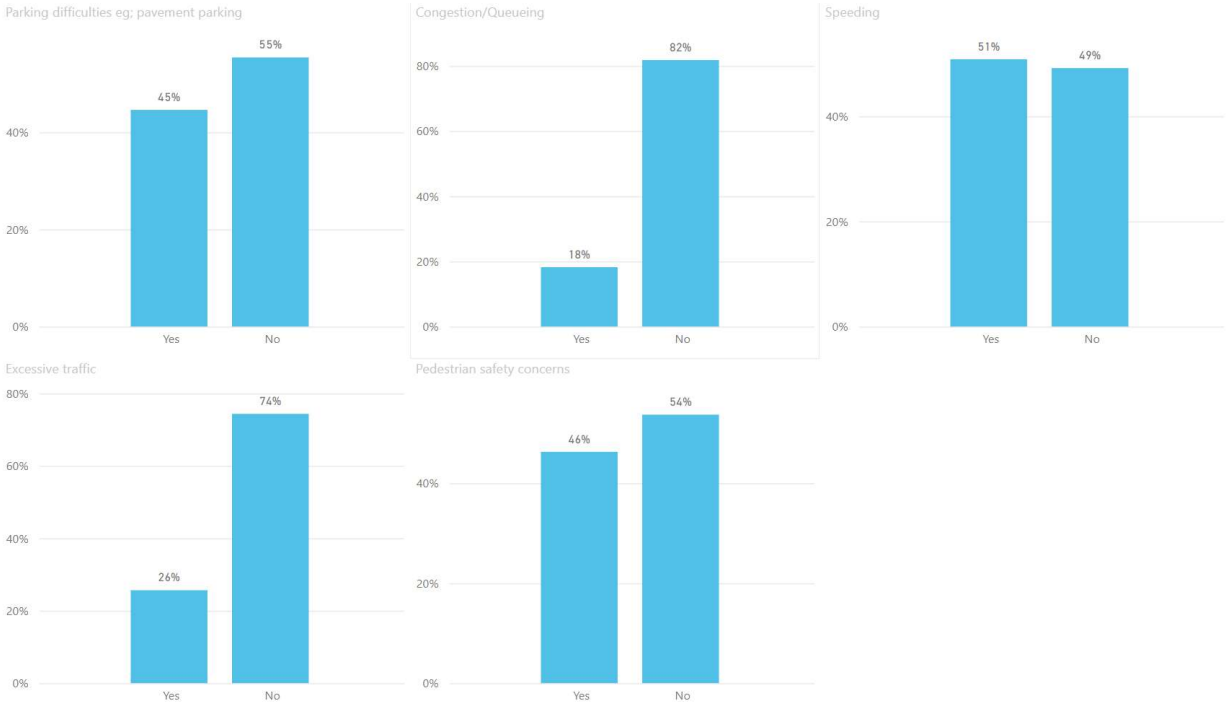
"What sort of parking is available in the parish for visitors?"

"Are there opportunities for public/community charging for EV vehicles in your parish?"

Transport Related Issues

Facilities cause a range of issues related to the use of private vehicles

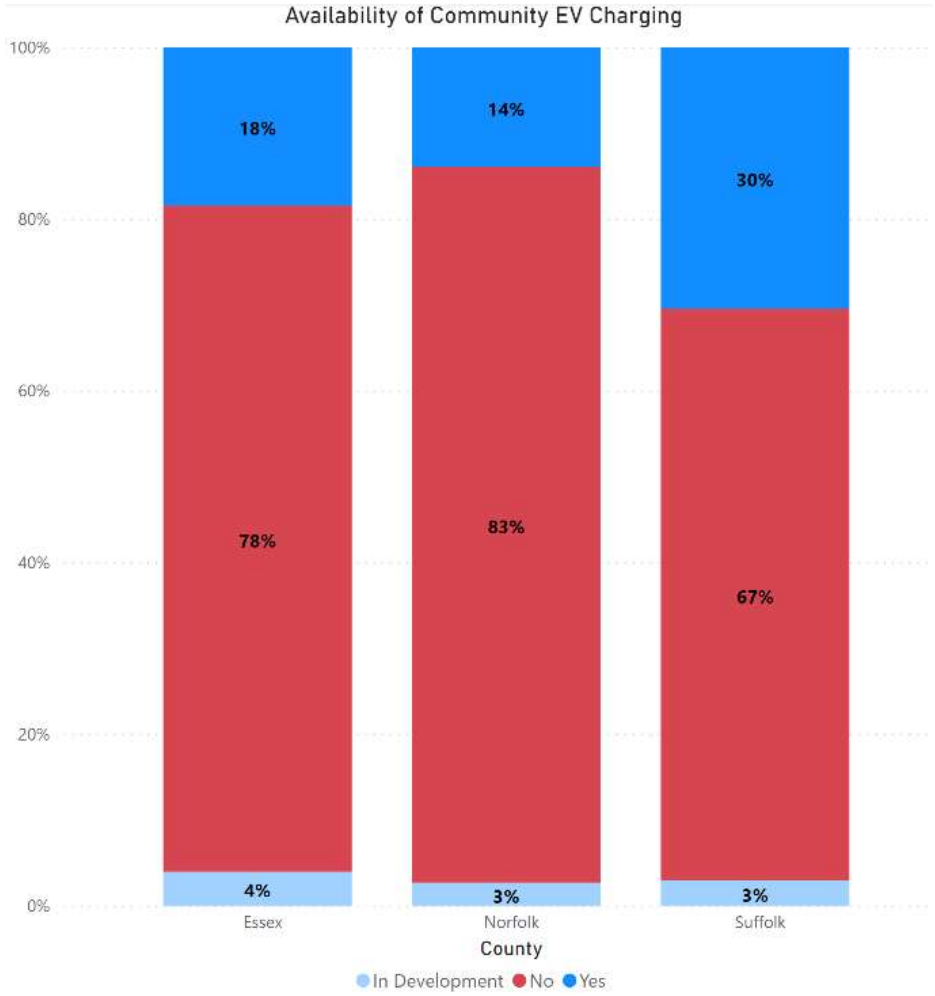
- Parishes report local points of interest causing a range of issues, however these are generally at a lower level, more detail should be sought in future work from the Rural Centre of Excellence to look at duration and frequency of issues
- All of the issues are related to car travel – including safety (speeding), network performance (excessive traffic and congestion)
- Pedestrian safety and speeding are the most common issues reported, and this pattern is consistent across the region and individual counties
- Many of these issues are likely related or compound one another. For example, pedestrian safety is one of the top issues across the region, and will be exacerbated by pavement parking and other issues



Electric Vehicles

Electric Vehicle charging is not uncommon in the region and is growing

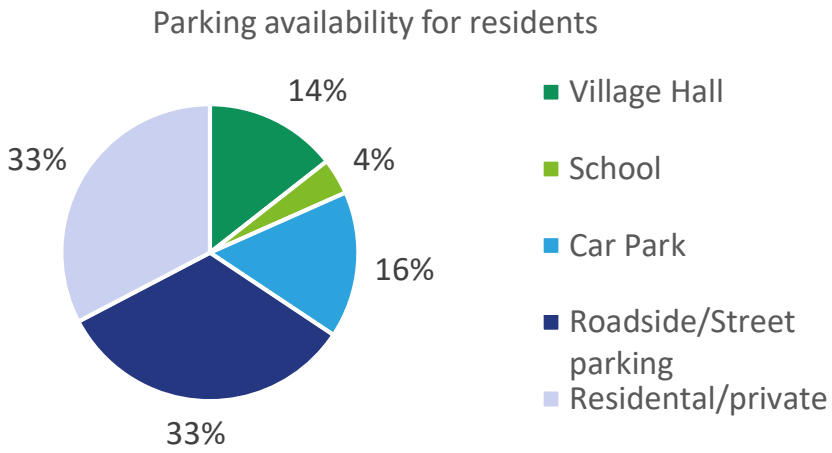
- This question was a free text response, and therefore analysis has been more qualitative
- Community EV charging availability in the region is low (20% of responses), but given levels of EV adoption nationally, this is very encouraging
- Suffolk has the highest amount of community charging available, potentially the result of the Plug in Suffolk project
- There is minimal community charging in development at present, however based on some of the free text responses (ten total) on future development, there is interest in building more capacity in future, which may not be captured in response to this question as development hasn't started
- This may limit the potential uptake of EVs in areas without off street parking as standard

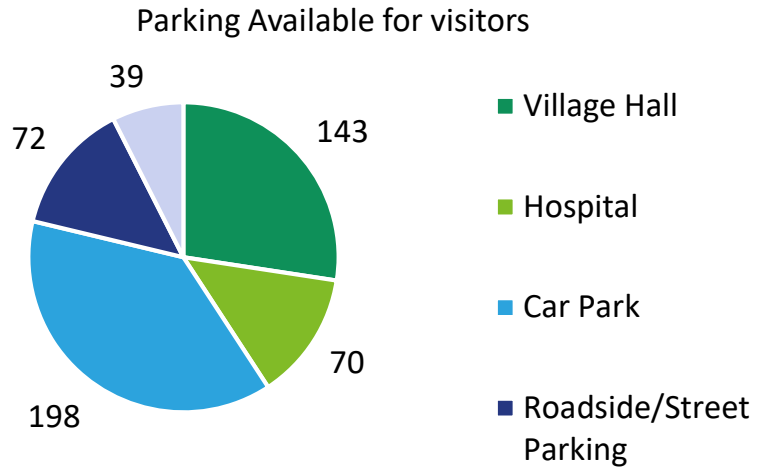


Parking Availability

Parking raises a number of common concerns

- Parishes where most residences have off-street parking raise fewer concerns about parking provision. The trend for households to have more cars is putting pressure on parking in areas where housing was designed with a single vehicle as the norm
- Village halls, community centres, and churches remain are common parking locations for both residents and visitors alike, especially in areas with fewer dedicated car parks
- Parking and congestion challenges were highlighted around school pick up and drop off times, with few other facilities beyond schools being highlighted specifically
- Road widths pose a challenge in a number of areas, especially with large goods vehicles and farm traffic
- For special events, parishes are able to use local business car parks or farmland for temporary additional capacity, but areas with more tourists or regular visitors face more challenges with parking





Improvements

Parishes are keen to be better connected by public transport and active travel

The above word cloud represents the answers to the question above analysed through topic modelling, the larger the word, the more frequent and prevalent it is amongst the topics.

Throughout the responses there is a desire for better public transport connectivity, especially bus connectivity (including direct and later running services), with variability in service provision in and out of school holidays and across the week flagged as issues.

Many respondees also acknowledge the challenges in providing services that are both frequent and commercially viable.

Integration between transport modes, amenities, and services as a key consideration for making sure that services are not just present, but are viable for resident's day to day needs.

Respondees want better policies that reflect their realities and provide for those on lower incomes or without access to car transport.

Cycling infrastructure is also cited as a common improvement that would benefit communities, along with ensuring that pavements and footpaths are suitable for those with accessibility needs.

Improvements

Parishes also highlight their most valued services

Respondees were asked for their views on how transportation could be improved in their areas. Many responses focus on the loss of, or need to preserve community amenities like village halls (which are some of the most common amenities across the region).

Some individual parishes are self-organising to provide support to their residents in terms of shared resources and local aid schemes.

Overall, parishes are aware of the challenges of providing viable transport services to residents, especially those on lower incomes or without access to private cars.

However, a desire for improved public transport services is the overriding message from the responses, and addressing common issues such as congestion and parking issues around schools.

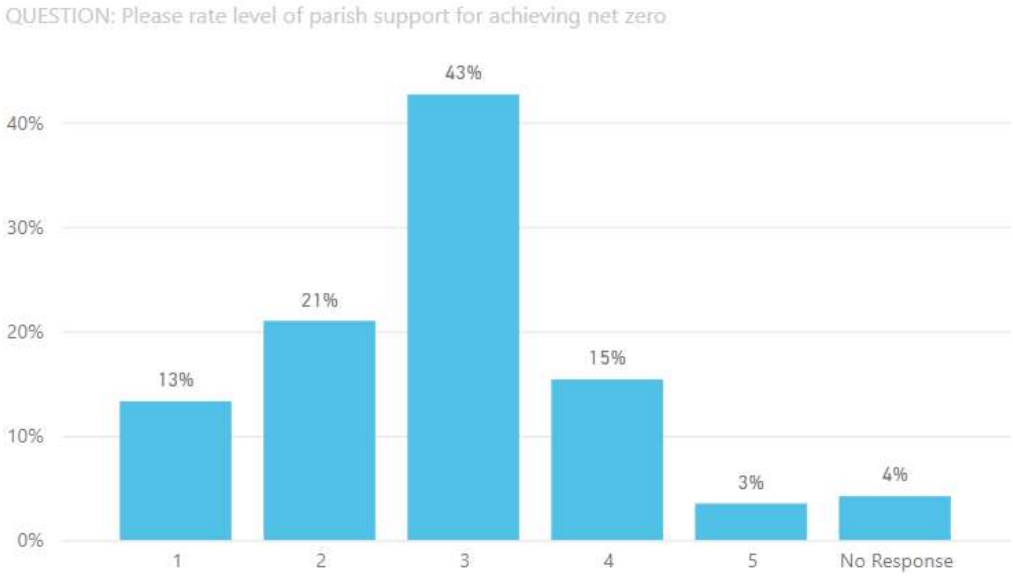
Some individual responses highlighted:

- Issues caused by park and ride services impacting local parking as people drive to access bus services
- Bus services only connecting to Norwich, rather than closer, smaller towns
- A lack of information about existing services, rather than a need for additional services

Net Zero

Parish support for achieving net zero is neither good nor bad

- Respondents were asked to rate their parish's support for achieving net zero. This is fundamentally, a quite broad question but the ratings scaled from 1 to 5
- Responses showed 3 being the largest rating, suggesting that parishes don't have a strong view around net zero, or that it hasn't been a part of their thinking to date
- More parishes responded with lower scores than higher



Conclusion

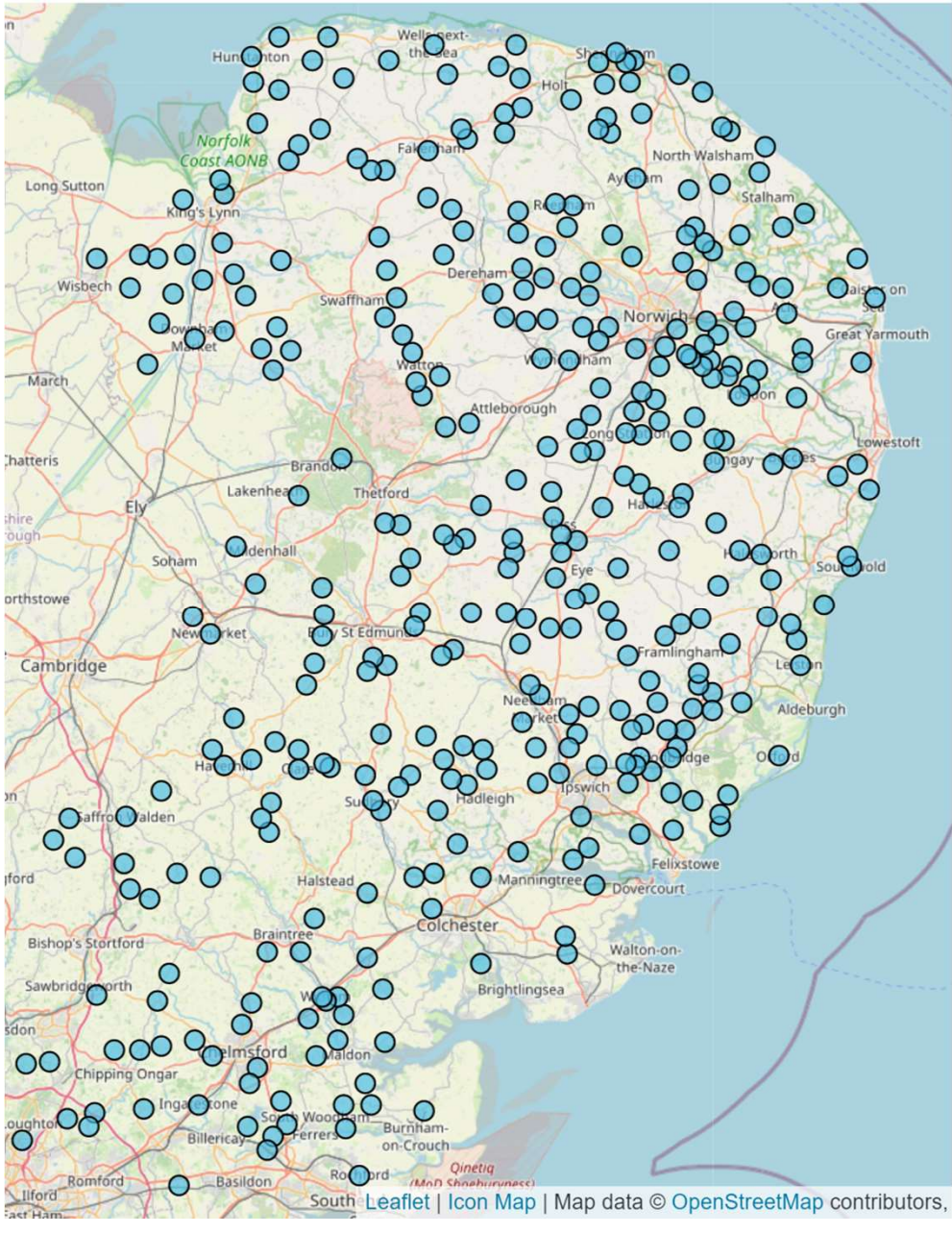
Conclusion (1/3)

The survey has painted a consistent picture of rural travel across the Transport East region

Rural areas make up the vast majority of the Transport East region, and this survey has revealed a consistent set of patterns across the region, with small variations (e.g. Essex tends to have higher levels of facility provision).

Parishes are able to provide well for their local communities for common needs, but are dependent on transport to access less frequent needs or facilities in nearby towns. The majority of residents are dependent on their cars to access the full range of services they desire, and it can be challenging for those without access to a car. There are opportunities to bring more services to these communities.

Areas with bus services or access to rail are the exception rather than the rule, and these areas benefit from access to these services, e.g. Norfolk's CoastLiner and CoastHopper services. The challenge is to provide useful public transport services to rural communities that



Conclusion (2/3)

The survey has painted a consistent picture of rural travel across the Transport East region

are also commercially viable, especially to those who do not have access to a car. There are promising examples of areas which provide excellent community transport as a potential alternative to fully fledged bus services which should be given further consideration. This could range from a commercially provided DRT service, to encouraging more informal sharing within communities. Respondees noted that connectivity to larger towns was much more prevalent to local services.

Active travel is popular in the region, and both on and off-road cycling and walking infrastructure being seen more positively by respondees, and active travel was a commonly requested improvement. This is especially important to ensure connectivity to public transport and facilities without needing to walk on the road carriageway.

An integrated view of transport is seen as desirable by many parishes – with services that are available not necessarily integrating well with one another, or with demand (e.g. opening times for amenities).

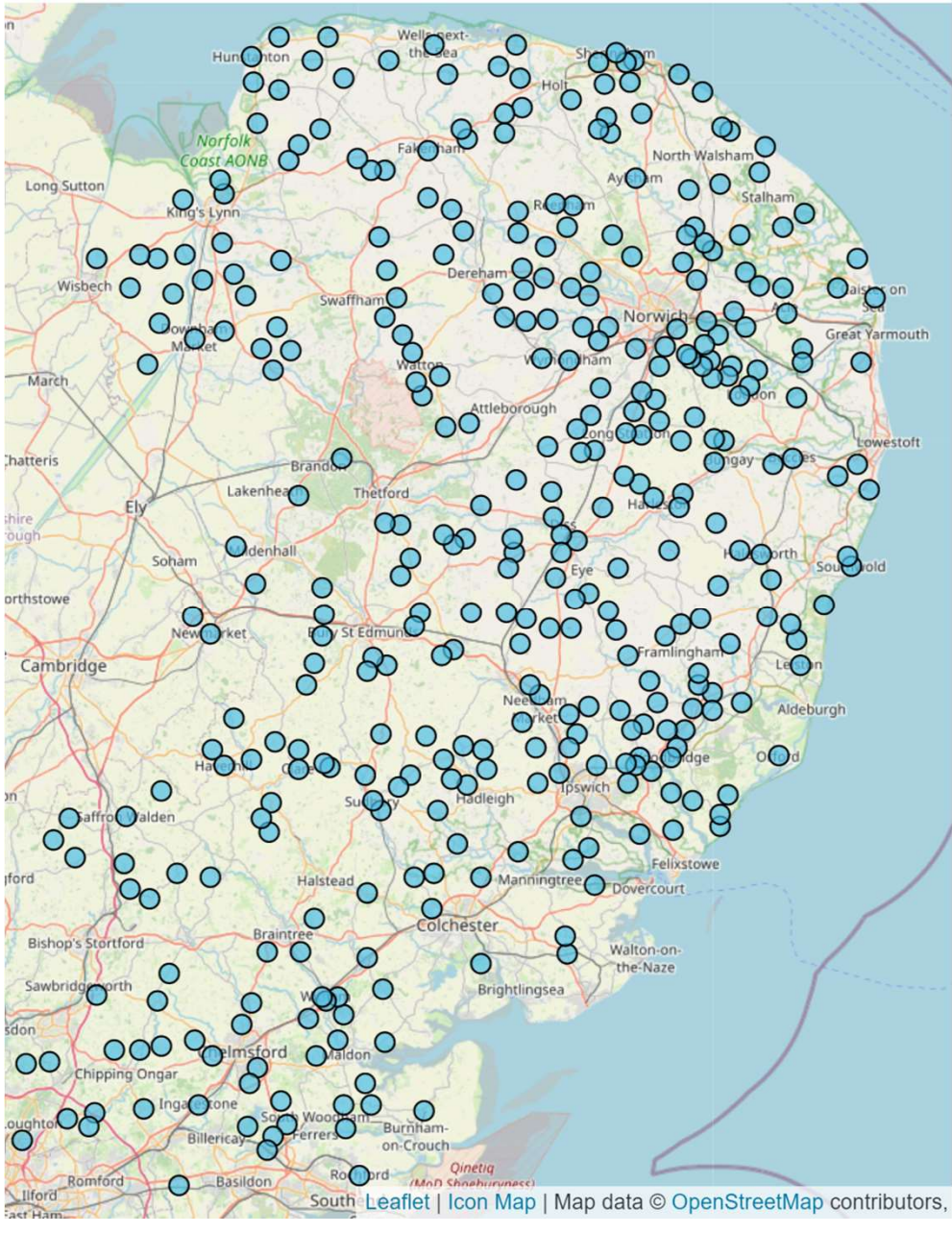
Encouraging better provision of both facilities and transport in ways that work for communities needs to be a priority. Many places could benefit from more mobile facilities (similar to the mobile library service) which could be shared across parishes, and utilise community spaces or primary schools in a flexible way to provide more amenities to residents in each parish, but also to neighbouring parishes.

This kind of development could be facilitated through a set of consistent and coordinated neighbourhood plans, which could look more holistically across small groups of parishes, rather than at a whole borough or county level.

Conclusion (3/3)

The survey has painted a consistent picture of rural travel across the Transport East region

Finally, sustainability is a concern, but not necessarily a priority, across the region. Electric Vehicle charging infrastructure is available in a minority of parishes, with others identifying the opportunity for including them.

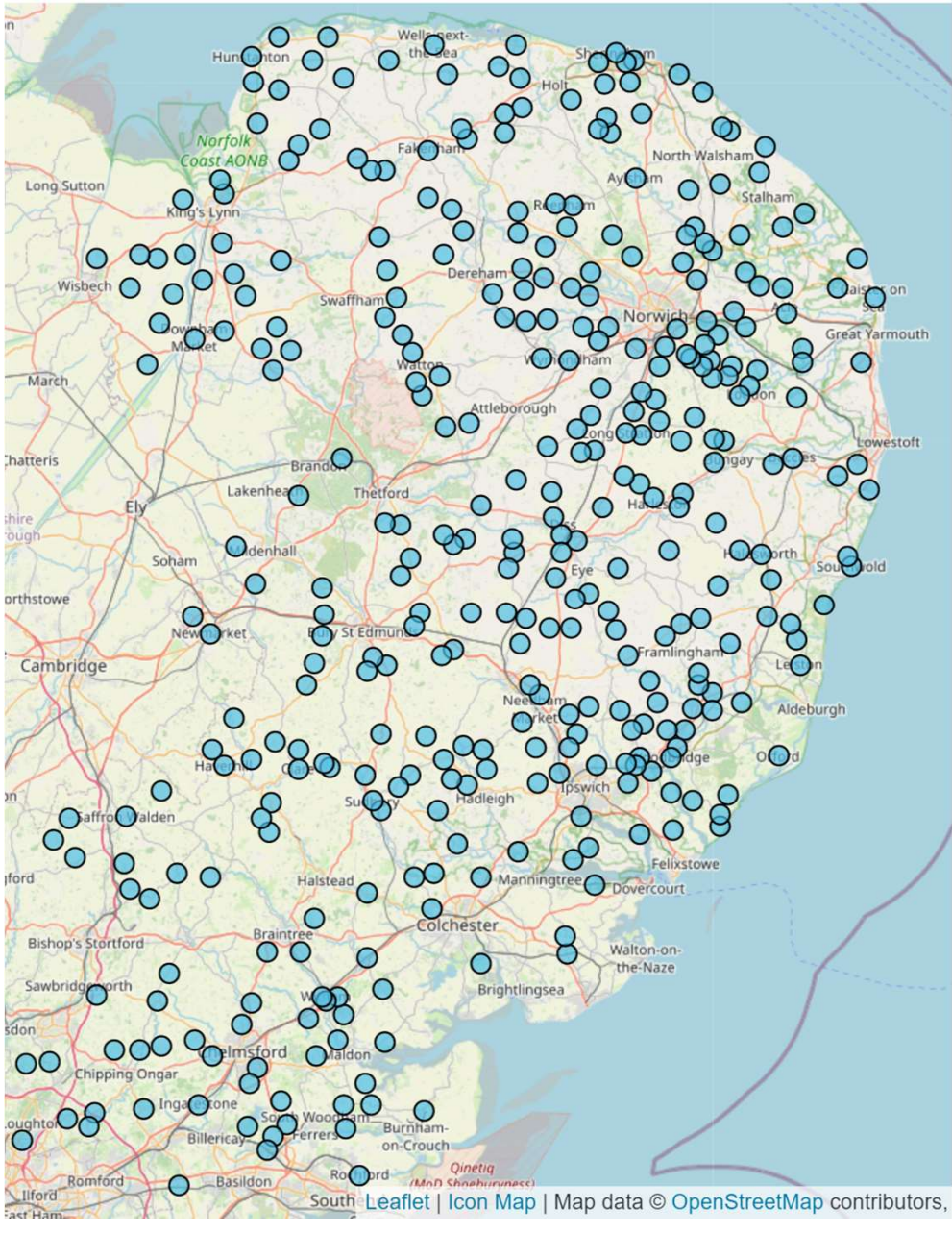


Moving Forward

Transport East has the opportunity to advocate for better transport for local communities as a whole

This survey has highlighted a consistent set of challenges for rural communities that Transport East can help with. Rural communities are significant across the region and can benefit from more consistent and coordinated support around their transport needs. These include:

- Support for developing neighbourhood plans and advocating for rural transport improvements as part of planning processes
- Advocating for the needs of rural communities as a strategic priority with national bodies
- Highlighting the need for improvements in sustainable modes of transport and advocating for these as part of an integrated transport network
- Connecting communities with one another to foster a regional network of good practice
- Leading on innovation, particularly around new community / demand responsive transport

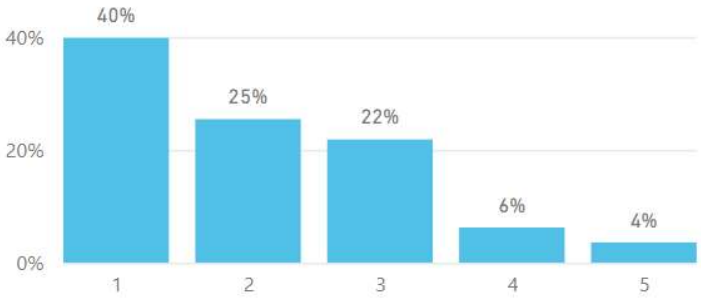


TRANSPORTEAST

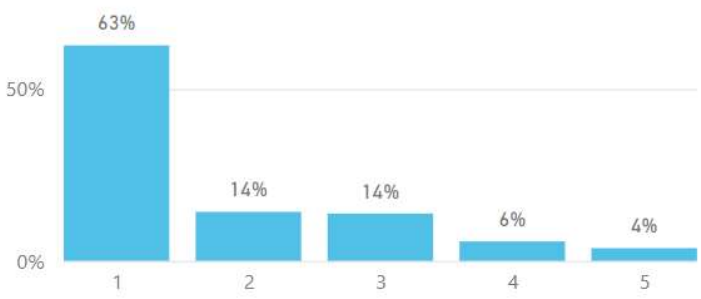
Appendix A:
Transport services and infrastructure dashboard extracts

Whole Region

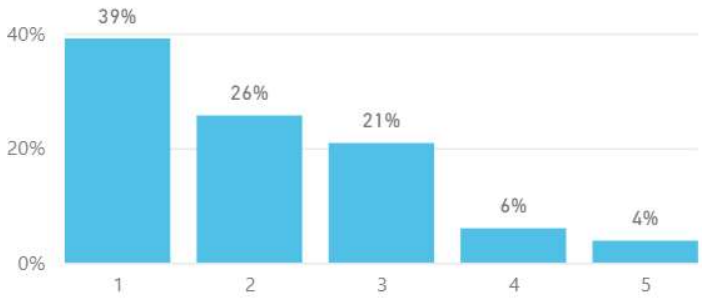
Access to buses

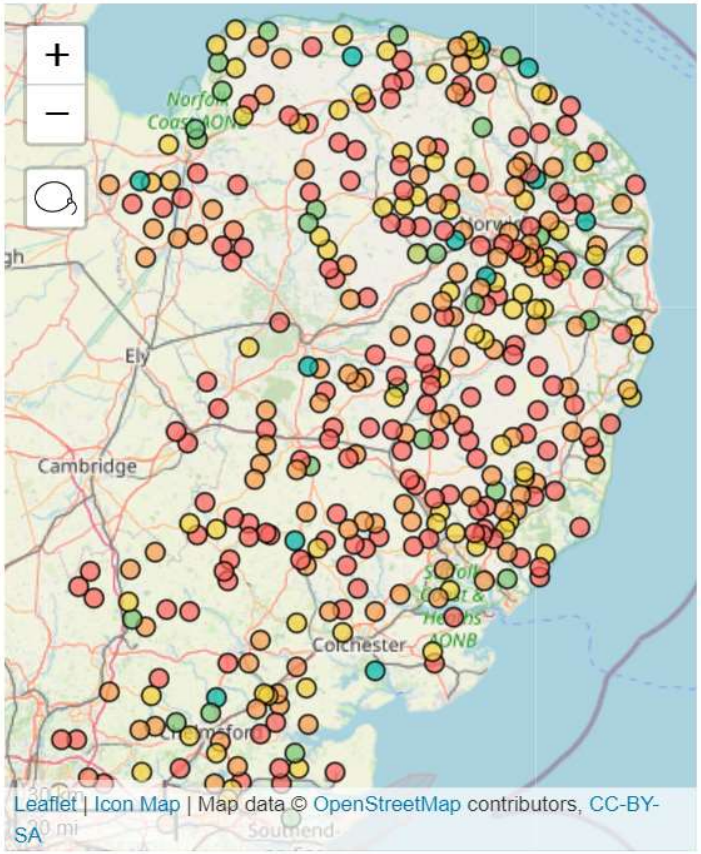


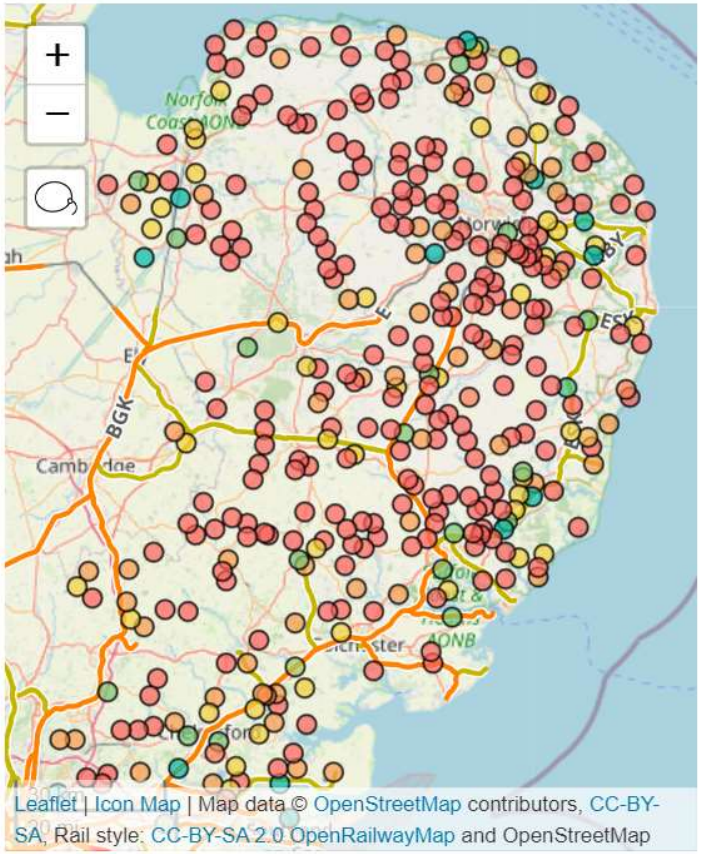
Access to rail

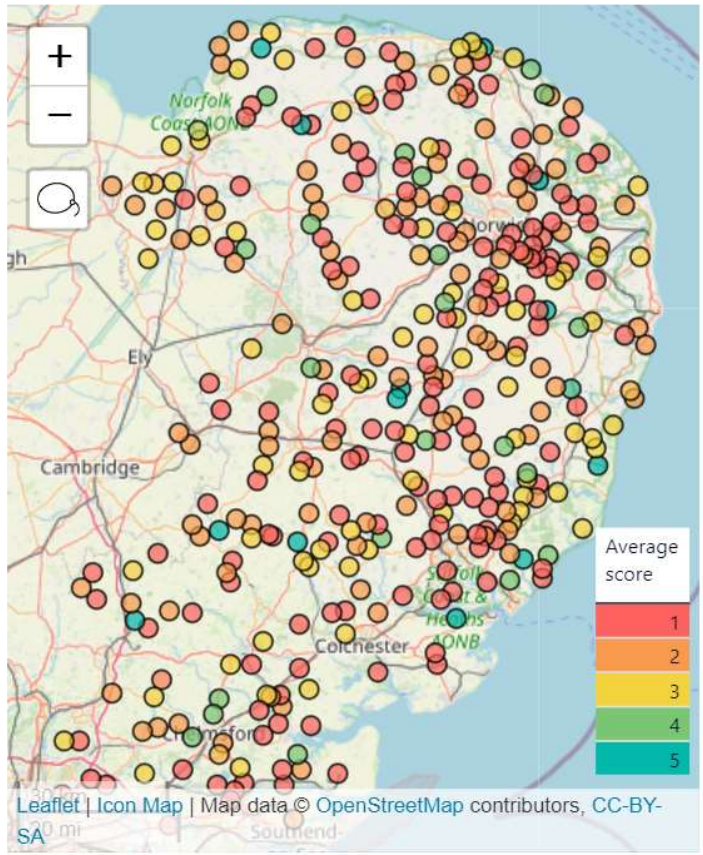


Access to community transport



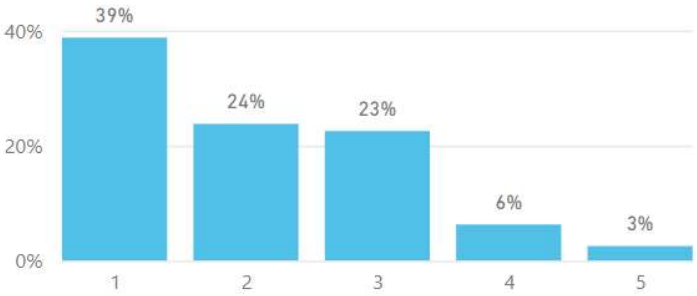




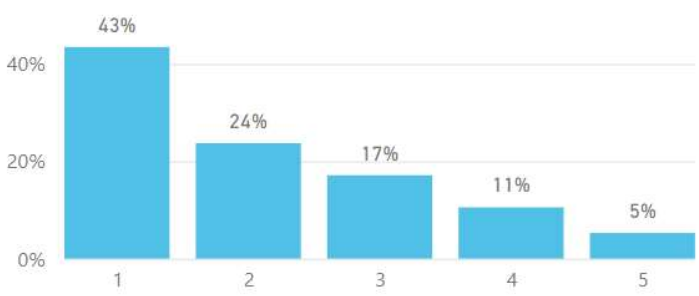


Essex

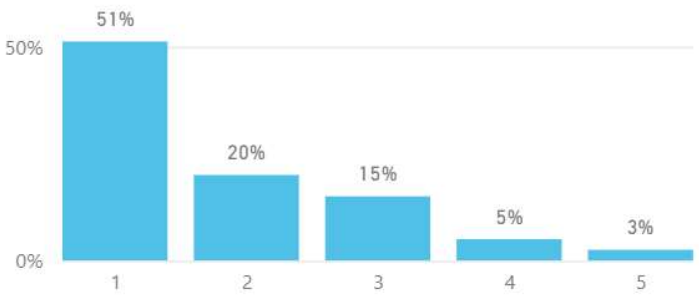
Access to buses

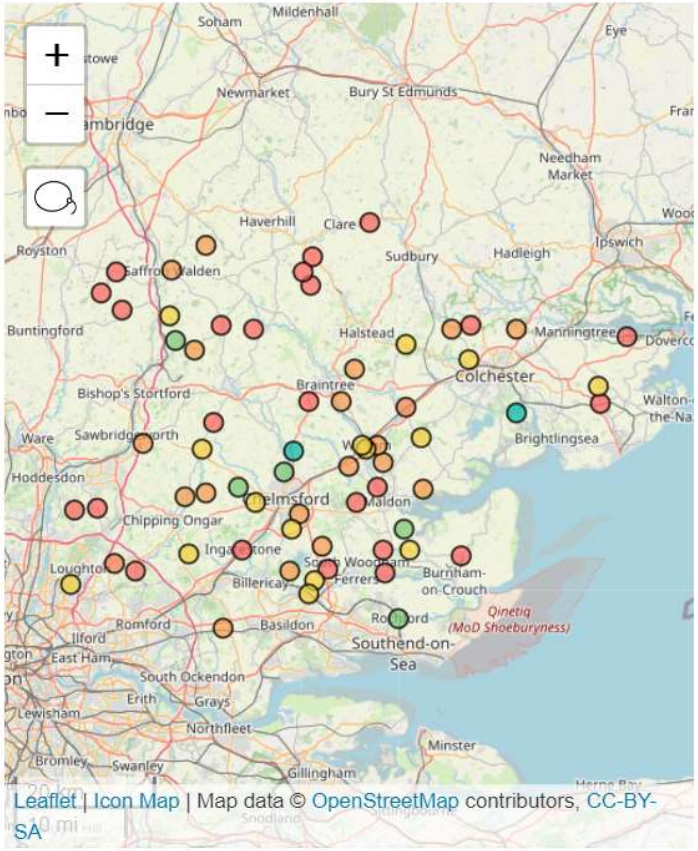


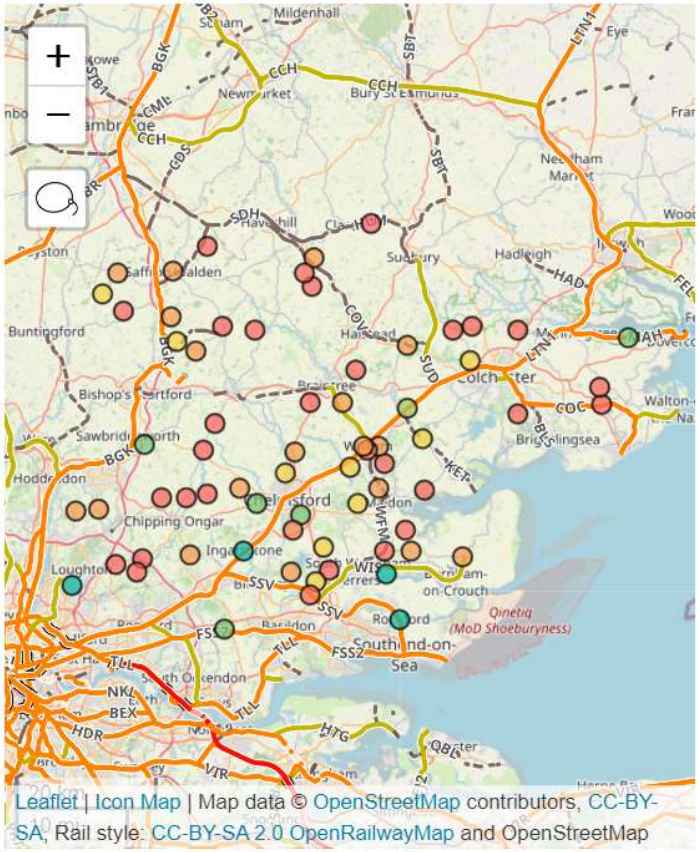
Access to rail

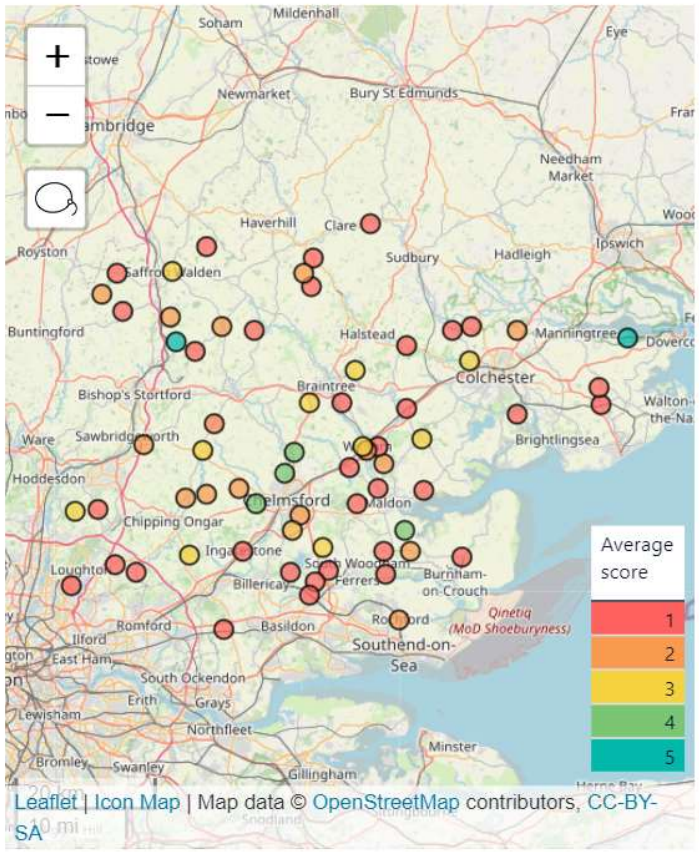


Access to community transport



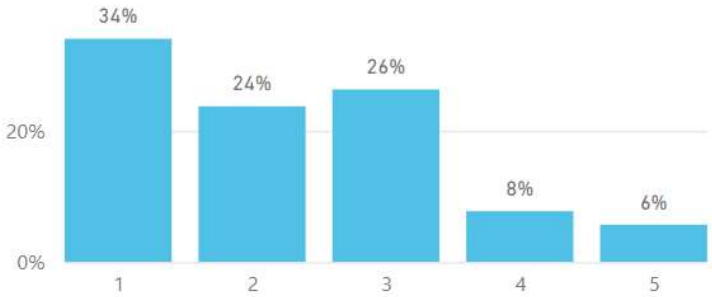




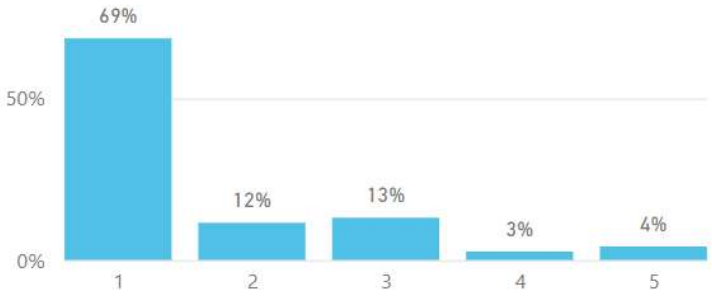


Norfolk

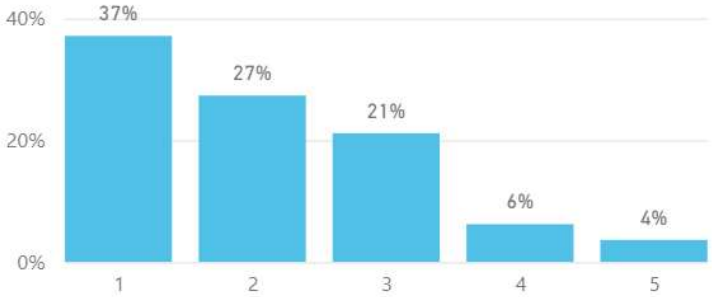
Access to buses

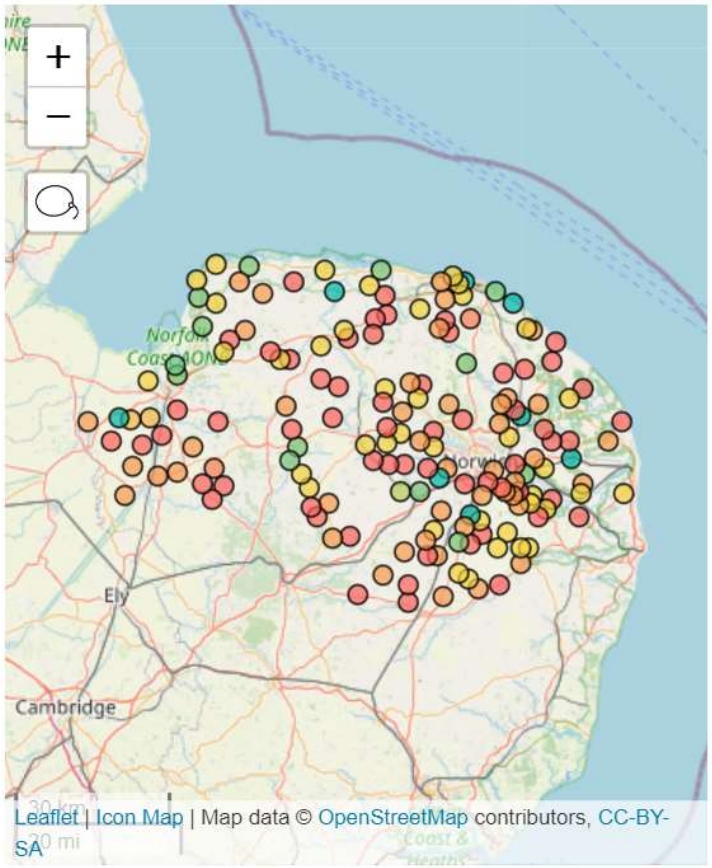


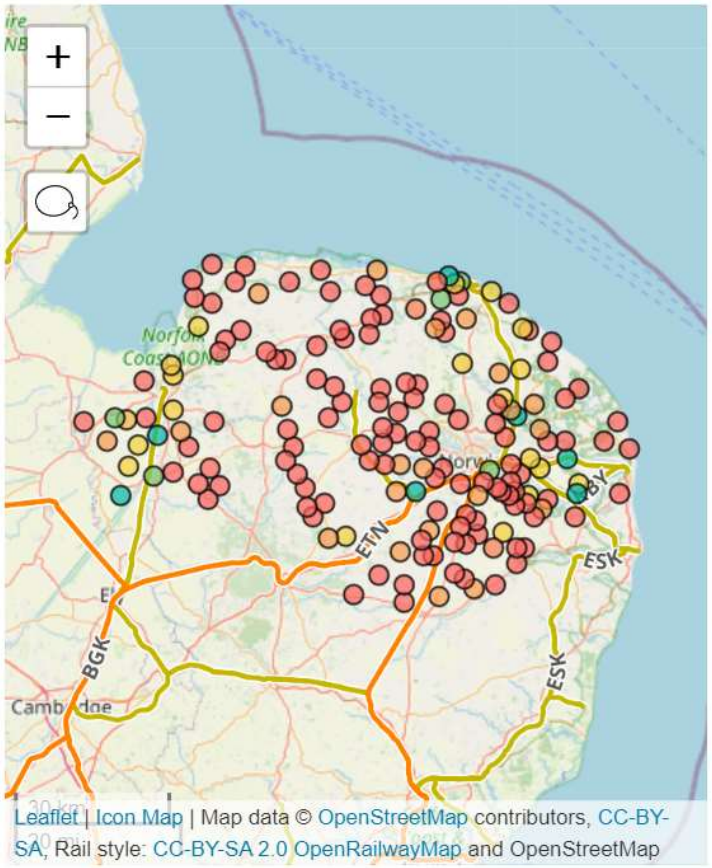
Access to rail

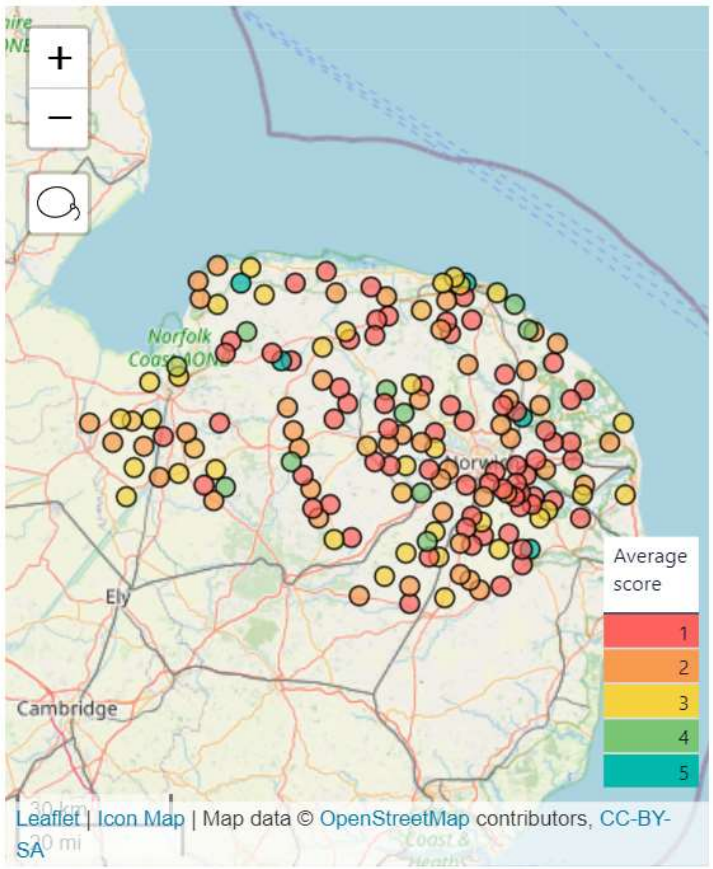


Access to community transport





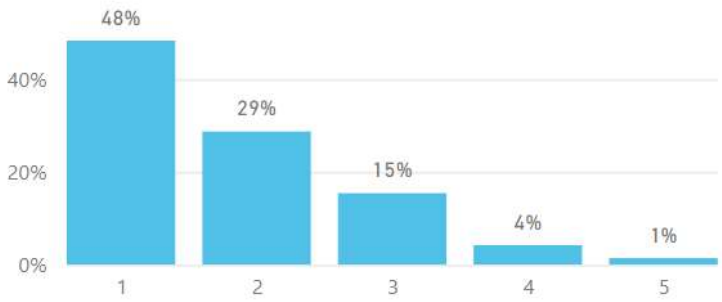




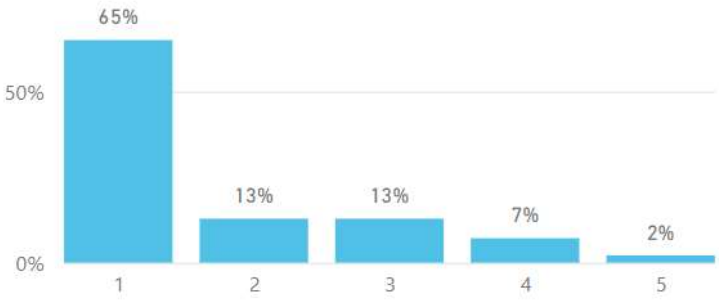
Suffolk

TRANSPORTEAST ARUP

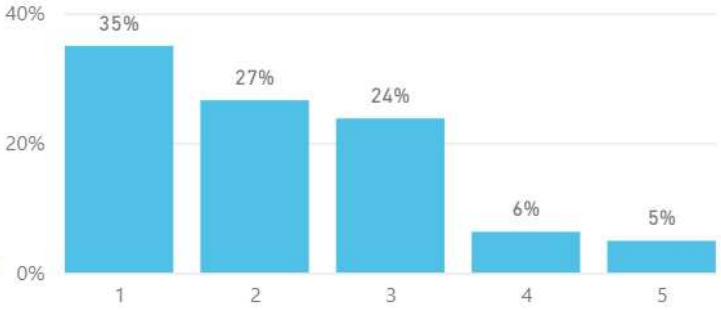
Access to buses

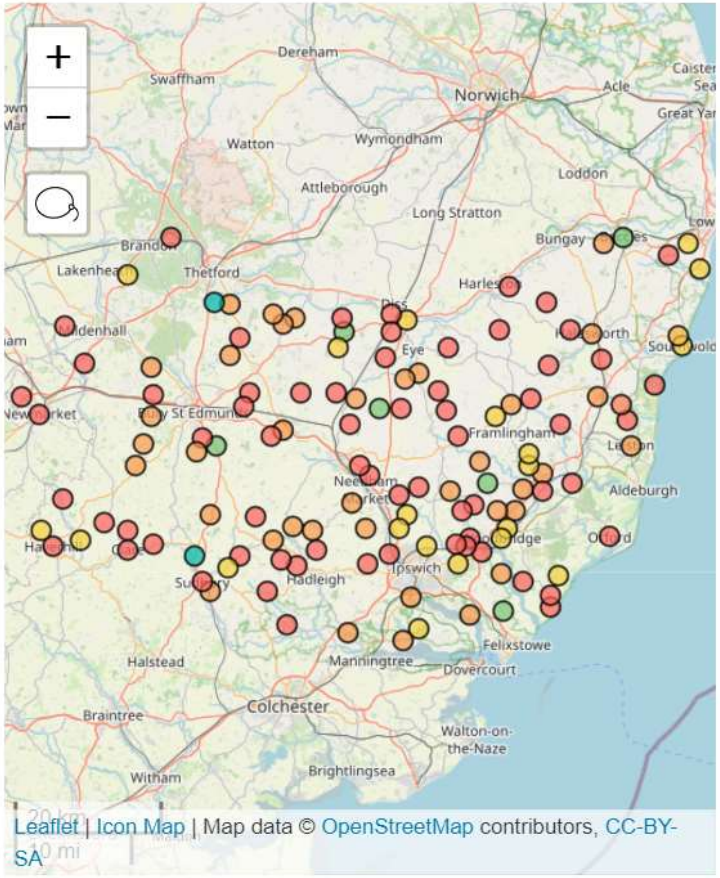


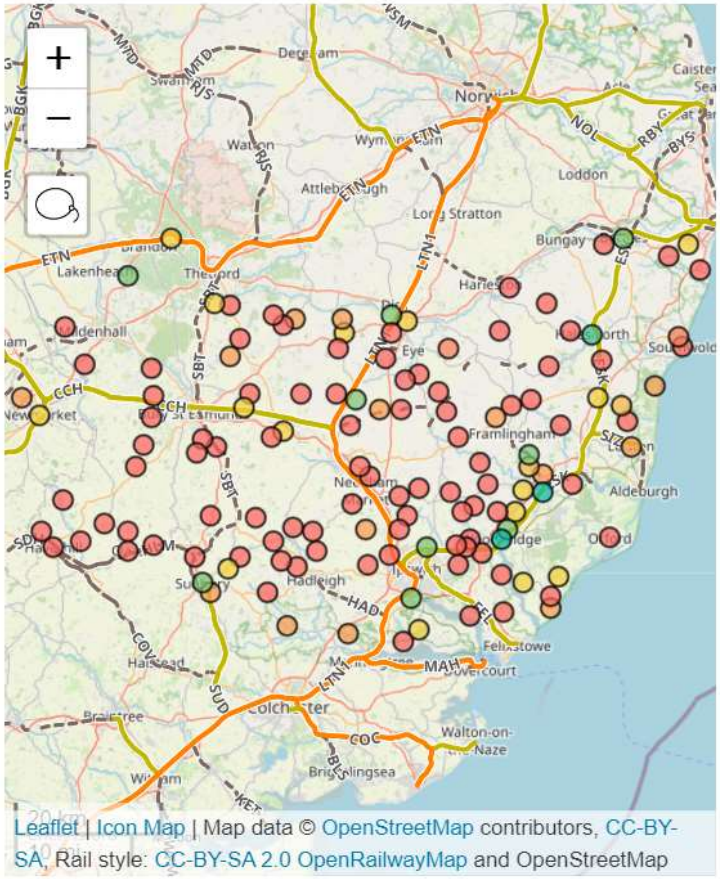
Access to rail

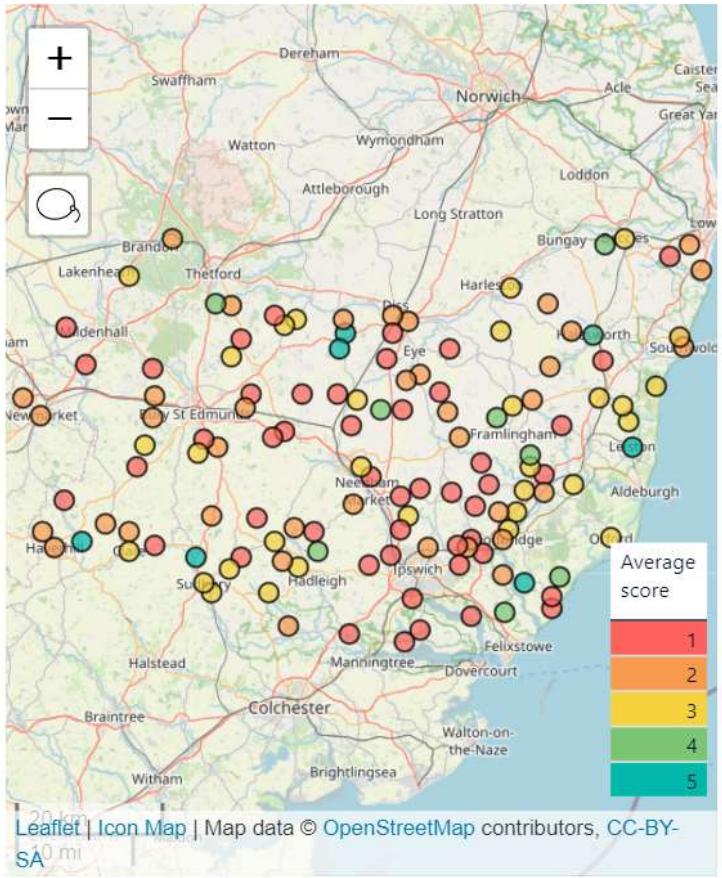


Access to community transport



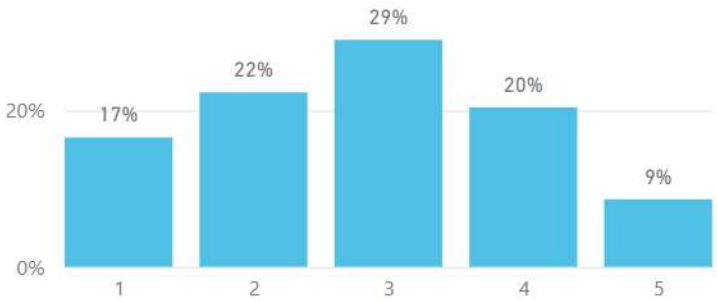




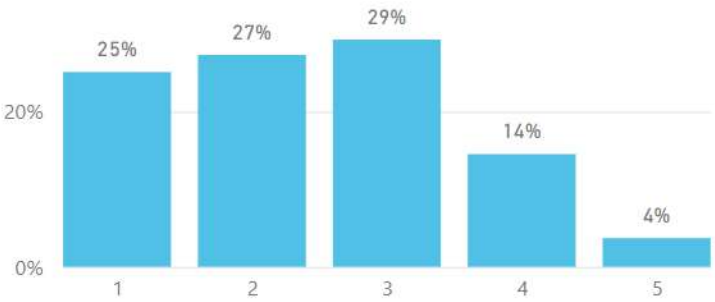


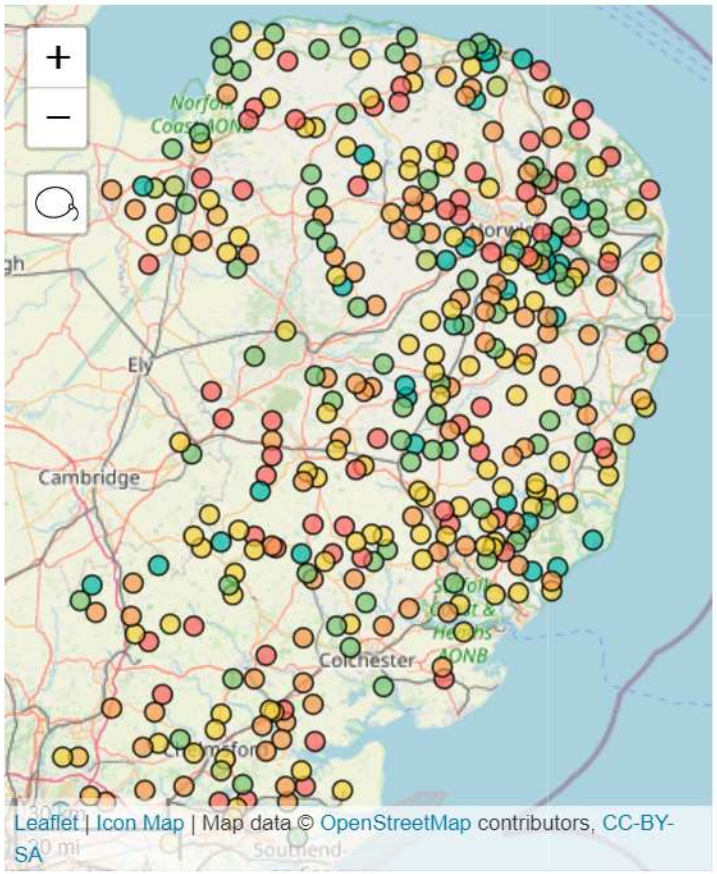
Whole Region

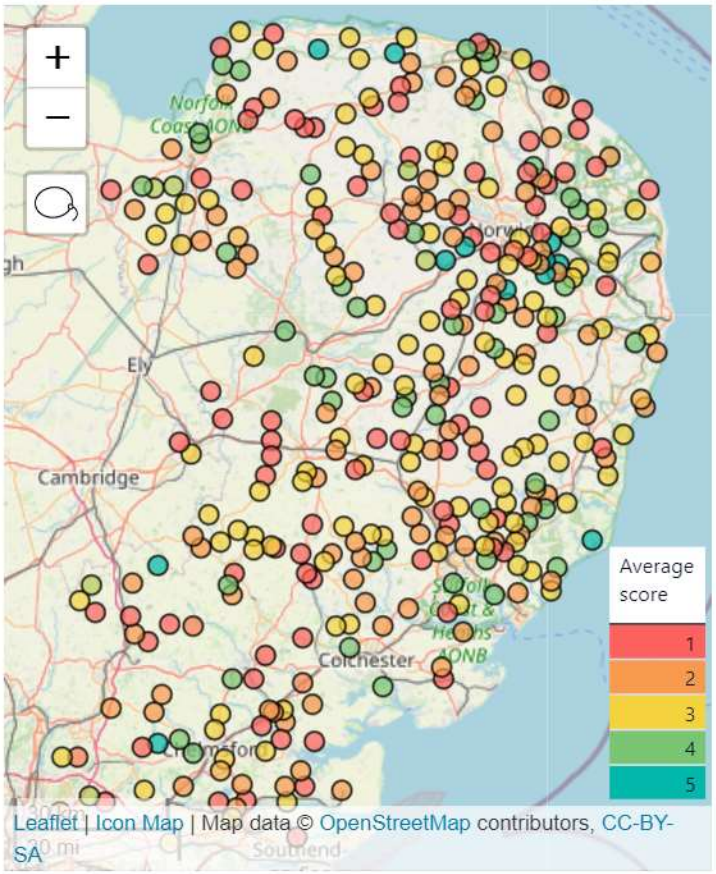
Walking facilities (on and off road)



Cycling facilities (on and off road)

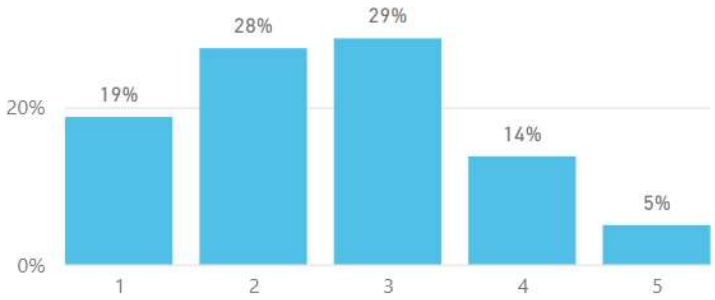




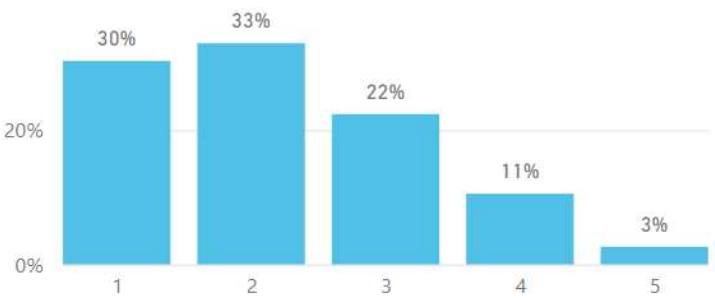


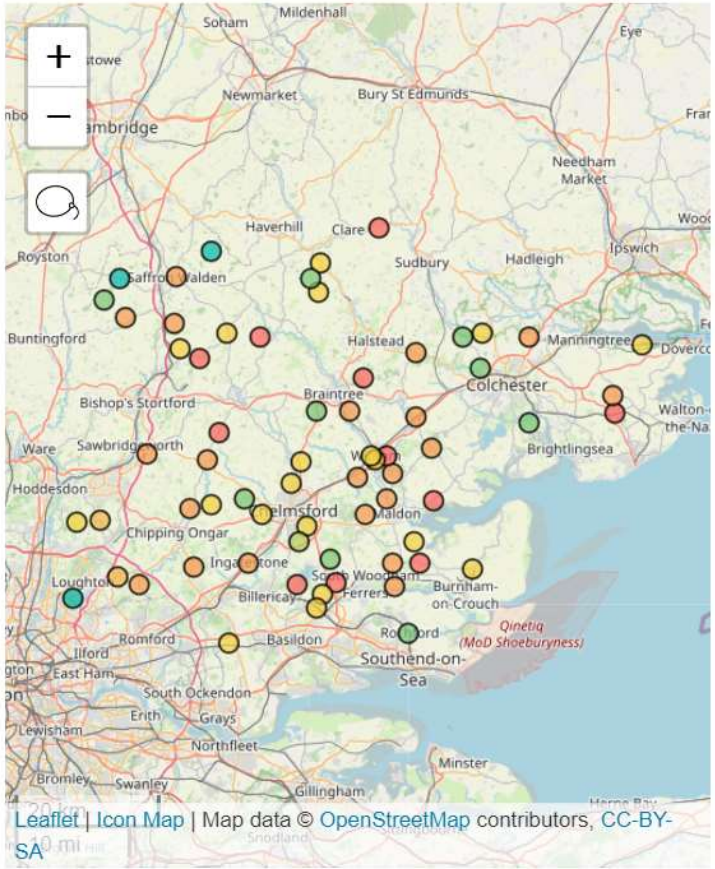
Essex

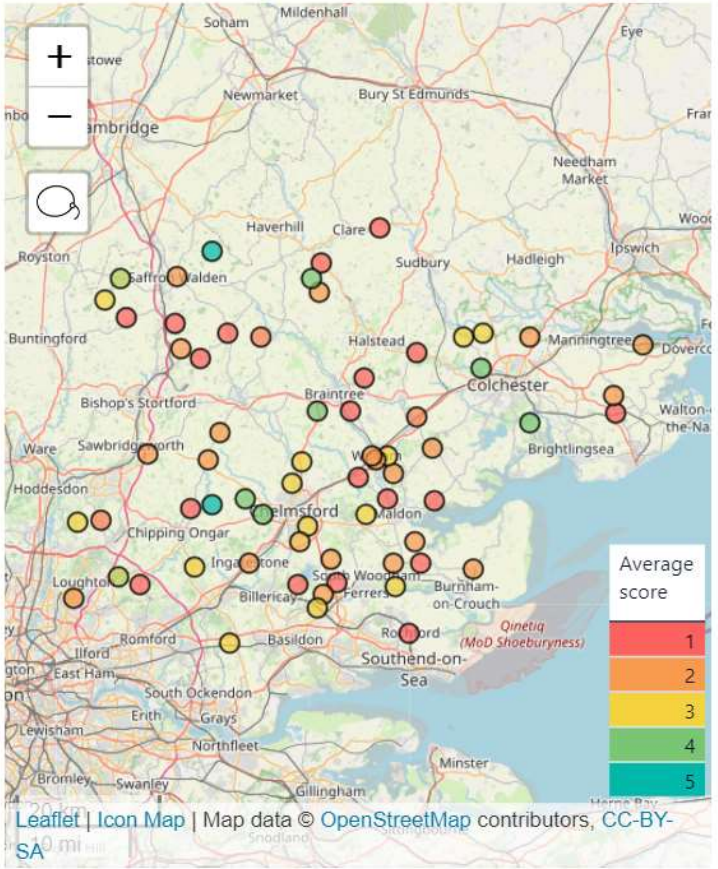
Walking facilities (on and off road)



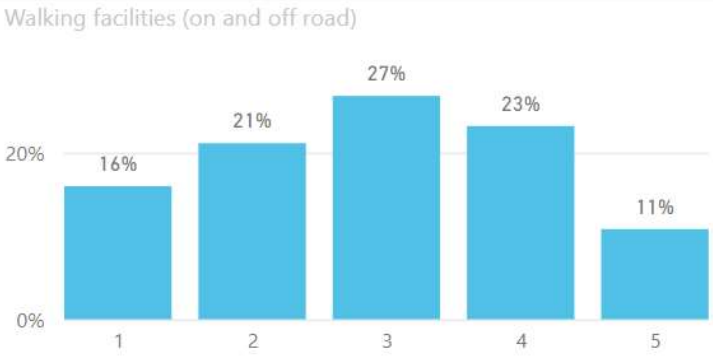
Cycling facilities (on and off road)







Norfolk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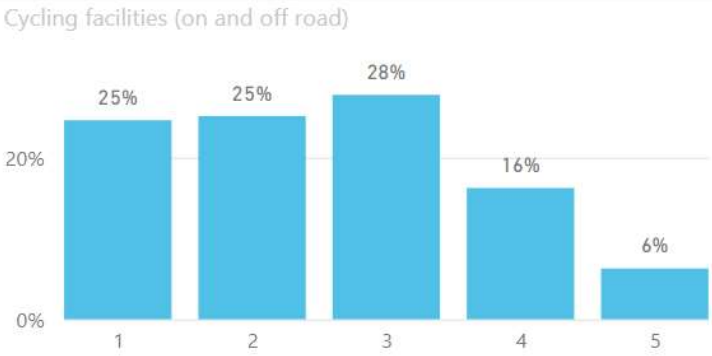
Cycling facilities (on and off road)
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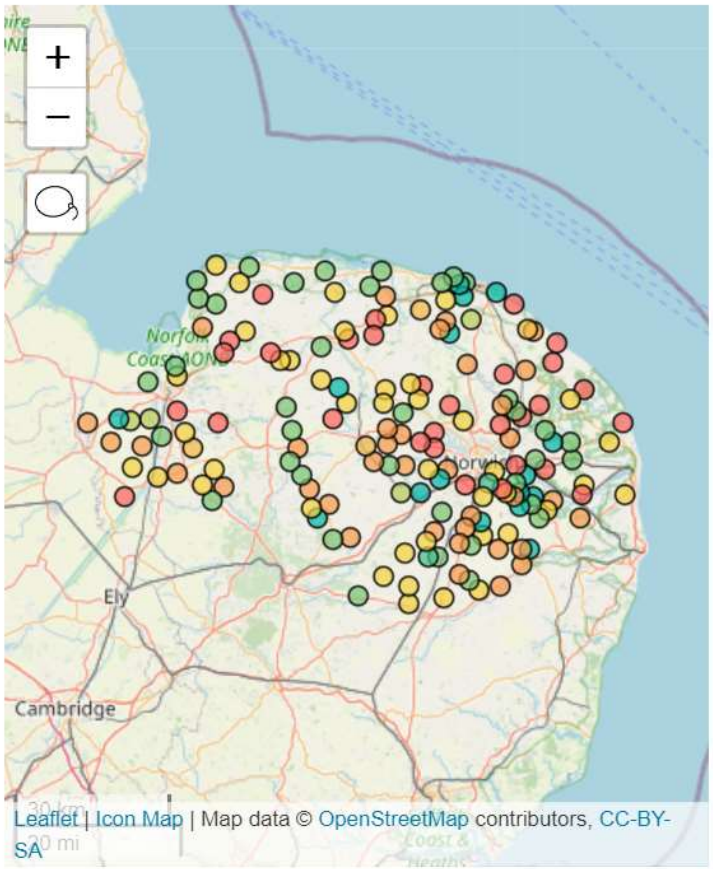
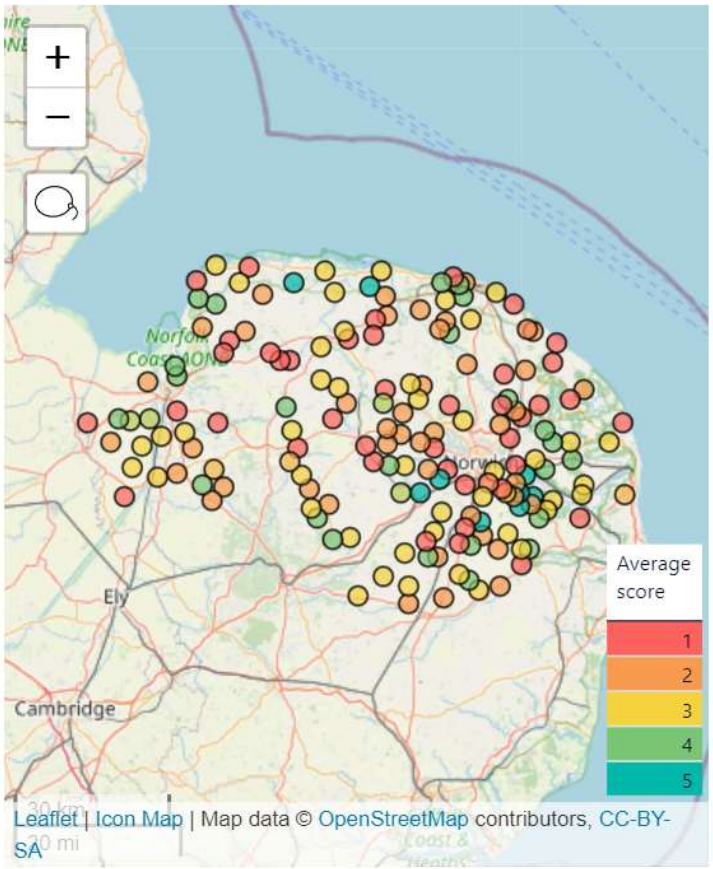

Ely
Cambridge
Leaflet | Icon Map | Map data © OpenStreetMap contributors, CC-BY-SA


Ely
Cambridge
Average score
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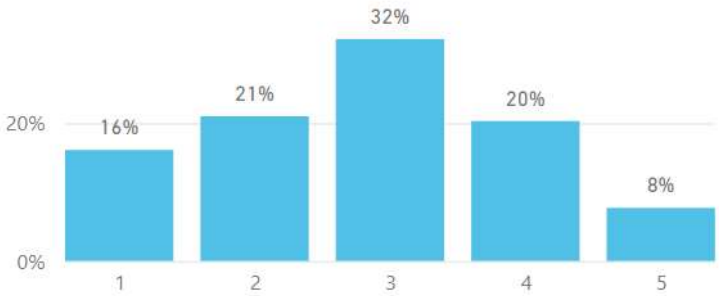
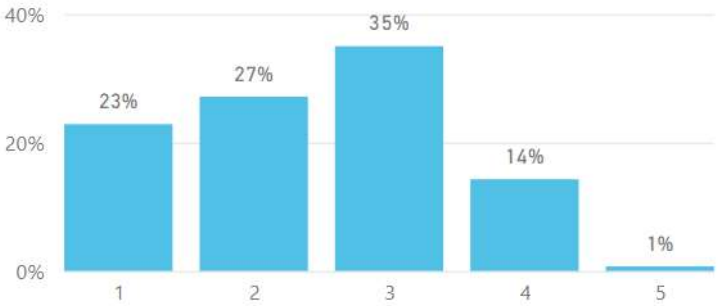
Leaflet | Icon Map | Map data © OpenStreetMap contributors, CC-BY-SA

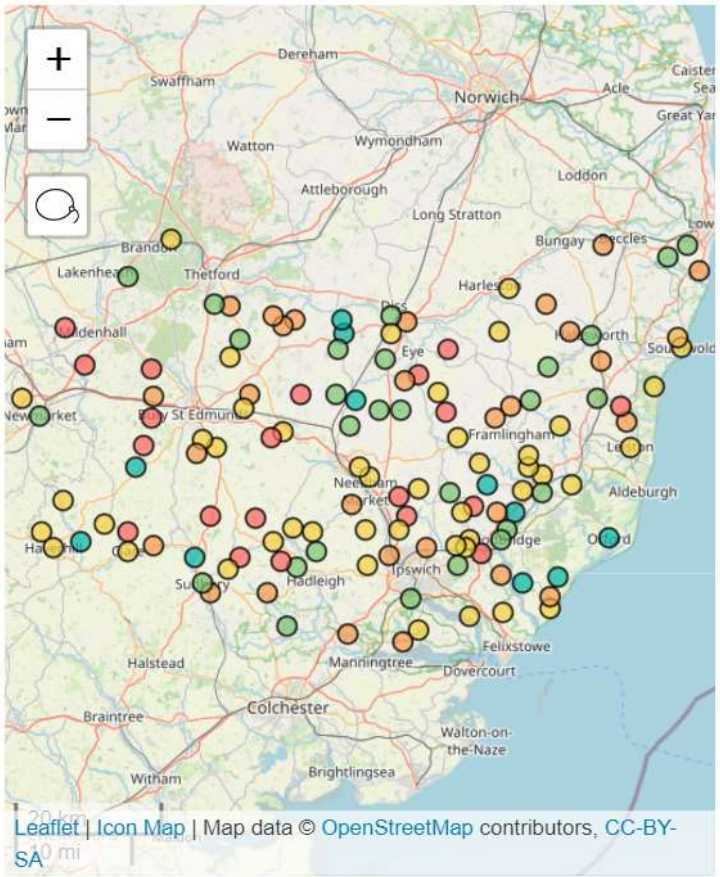
Suffolk

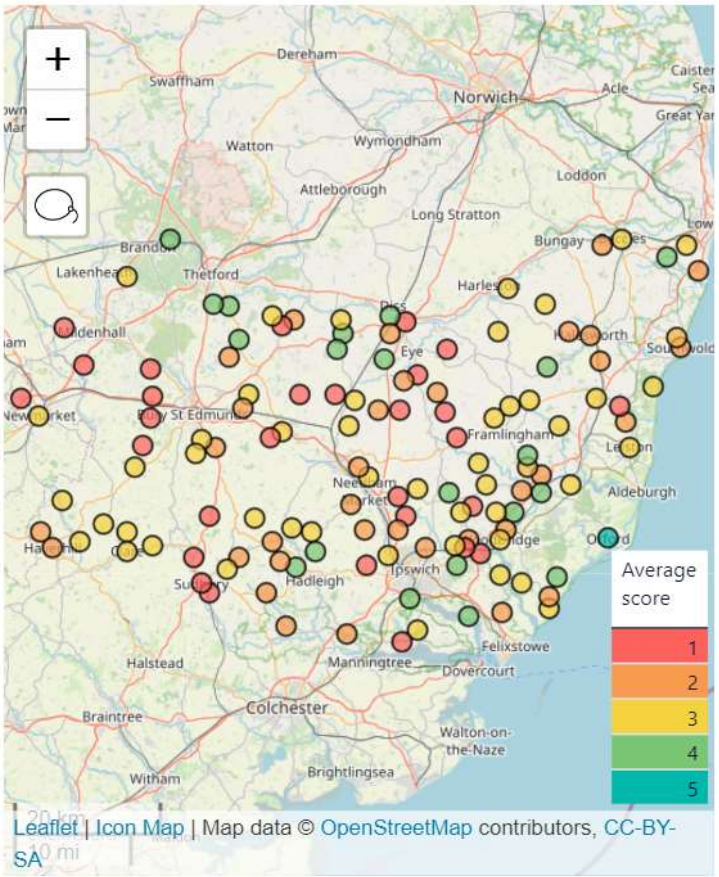
Walking facilities (on and off road)



Cycling facilities (on and off road)







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