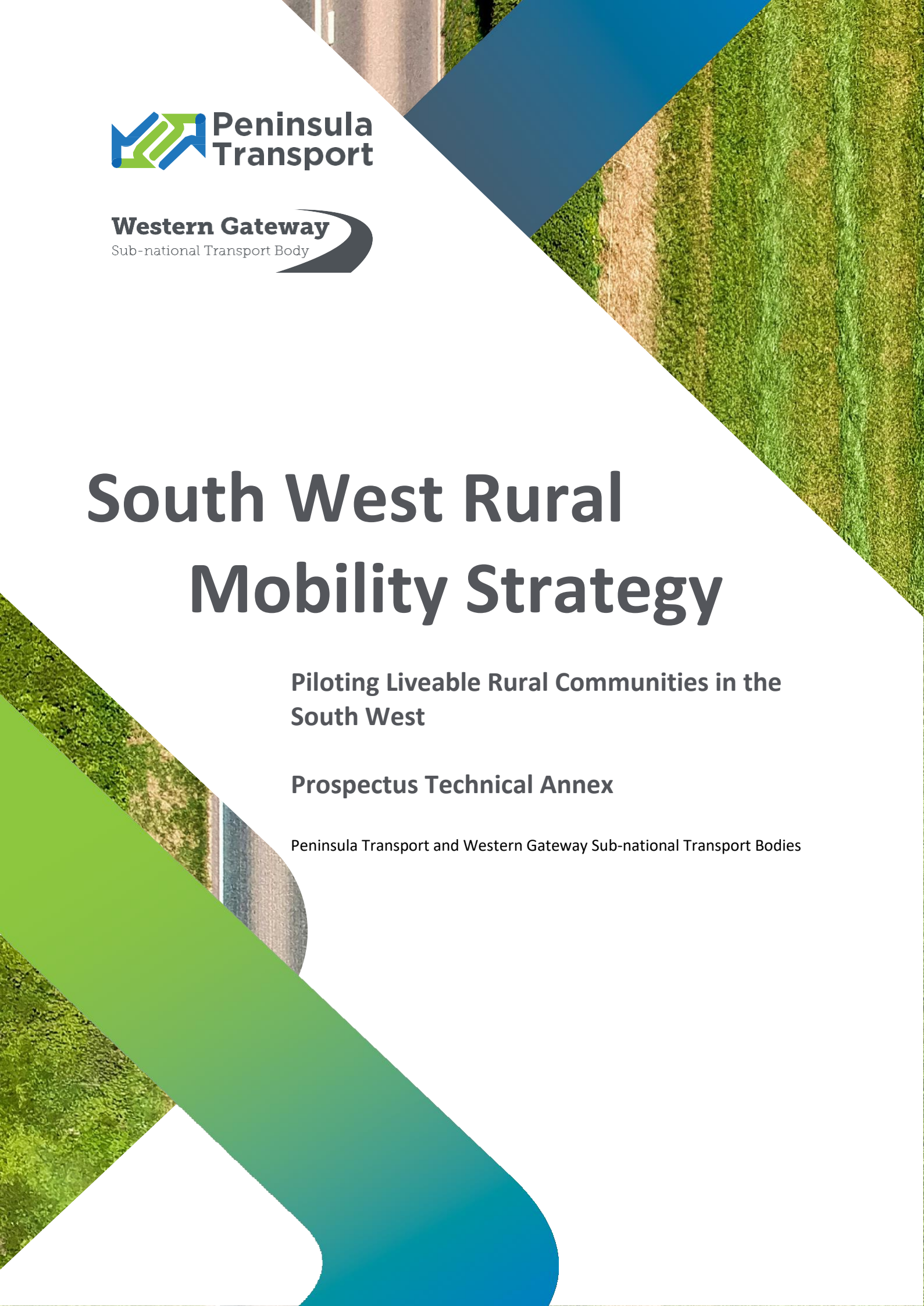

South West Rural Mobility Strategy

Piloting Liveable Rural Communities in the South West

Prospectus Technical Annex

Peninsula Transport and Western Gateway Sub-national Transport Bodies

INTRODUCTION

The South West Rural Mobility Strategy (SWRMS) sets out a vision for the future of transport in the countryside and coastal areas of our region. In support of that vision, the need to find better solutions to many of the challenges rural transport faces is vital. Peninsula Transport and Western Gateway Sub-national Transport Bodies (STB) are therefore committing initial funding of up to £100,000 (£50,000 each) to support the early development and delivery of pilot projects in the region.

Significant work is being undertaken across the UK to find the right solutions to rural transport issues and the South West must play its full part. We have developed a specific scope of pilot projects we will support, which is outlined in the prospectus and elaborated on further within this technical annex. In response, we are looking for potential lead organisations to develop pilot project propositions and submit their plans to us. We will then allocate funding based on propositions that best fit our scope, are most innovative and could deliver the most learning. We are looking to fund at least two pilot projects, one in each of the two STB areas. An application form for the funding of pilot propositions accompanies this Technical Annex.

The Sub-regional Transport Bodies in the South West

The SWRMS was published by Peninsula Transport and Western Gateway, which are the STBs for the South West of England. The STBs are alliances of local authorities working with stakeholders to address the transport and infrastructure needs of their regions to boost economic growth and support their communities. These two STBs cover the entire South West region from Gloucestershire, Wiltshire and Bournemouth, Christchurch & Poole in the east to Somerset, Devon and Cornwall in the west, alongside the West of England Combined Authority Area, Torbay and Plymouth.

The STBs have taken a lead on developing rural mobility policy for the region through the development of the strategy and are now working with stakeholders to take important steps to delivering change for our countryside and coastal communities.

Our prospectus and this Technical Annex

The document presents a Technical Annex to our prospectus for the programme of rural mobility pilot projects. The prospectus sets out our proposals, how they will be taken forward, confirms what funding is presently available and makes the case for further funding. We also set out how partners and stakeholders can become involved.

This Technical Annex provides more information to support the prospectus, including the following:

- The six rural mobility grand challenges
- Our people and places approach to rural mobility
- Our pilot programme theory of change and logic map
- The ten pilot concepts
- The pilot programme route map
- Our monitoring and evaluation framework

RURAL MOBILITY GRAND CHALLENGES

Rural areas face a complex web of interlinked issues while at the same time providing considerable benefits to the wider region and the country as a whole. Our countryside and coastal communities in the South West are home to 33% of the region's population, they provide great places to live and are areas of valuable cultural heritage as well as breathtaking landscapes and rich natural environments.

Furthermore, in striving to overcome some of the critical threats we all face such as climate change, eco-system breakdown and food security, our countryside and coastal areas will have vital roles to play locally, regionally and nationally.

The weaknesses we find in rural mobility in the South West, and elsewhere, are hindering realisation of the benefits and opportunities that countryside and coastal areas can deliver.

To define the key areas for action, we have set out below six Grand Challenges for rural mobility. These are the major problems we have found through all our work, analysis and engagement, which, if resolved, could transform rural mobility and the communities and economies it supports.

Our six Grand Challenges for rural mobility are:

1. **How can rural transport be made more operationally sustainable in the long term?**

   Recent years have seen substantial cuts to local authority budgets, and it seems unlikely that this trend will be reversed in the short term. A major effect of this reduction in funding has been similar substantial cuts to bus subsidies, with the effects felt particularly in smaller urban and more rural areas. The number of bus services in rural areas has reduced dramatically, with many areas losing bus services altogether. Between 2010 and 2022, bus mileage in county areas declined by 26.5%[1]. In the face of such funding difficulties, the first Grand Challenge focuses on identifying operational models that are sustainable both now and in the longer-term future.

   The bus challenges compound the longer-term effects of the decline in rail services in rural areas over many decades, as well as the generally lower levels of funding per capita for transport in rural areas compared to their urban counterparts.

[1] Rural bus services at a 'historic low', as new report reveals urban locations received two-thirds of flagship government funding - County Councils Network

2. **How can the Net Zero challenge be met in rural areas?**

   Local authorities across the South West have their own individual net-zero agendas, all have declared climate emergencies[2] and collectively the region should be striving to deliver Net Zero. Transport decarbonisation aspirations will not be achieved purely through higher uptake of Electric Vehicles (EVs), it will require large effort in promoting the 'Avoid, Shift and Improve' approach[3], in order to reduce unnecessary trips, change modes of transport and reduce emissions from vehicles.

   Rural areas will play a major role in combating climate change and meeting Net Zero including through renewable energy generation, carbon sequestration and mitigating the impacts of extreme weather. However, reducing carbon generated by transport is more challenging in rural areas. As evidenced within the SWRMS, rural areas have higher car ownership, longer travel distances and poorer provision of publicly available modes of transport. Typically, only 5% of rural households outside of rural towns do not have access to car compared to 34% in urban conurbations. On average, as highlighted in the SWRMS, people living in the most rural areas travel almost twice as far per year as those living in the most urban areas.

3. **How can rural mobility be more equitable for residents and visitors?**

   Demographics can have a significant impact on mobility needs within rural areas and specific groups within communities are particularly impacted by poor rural mobility. While travel in rural areas is very much car-dominated, particularly due to the poorer levels of public transport provision, a focus on car travel hides the significant number of people who have no choice but to use alternative modes. People with disabilities are more likely to be car passengers than people without disabilities (19% compared to 12%) and less likely to be car drivers (42% compared with 48%)[4]. In 2021, disabled adults over the age of 16 made 28% fewer trips than non-disabled adults.

   Younger residents who have yet to learn to drive, older residents who may have given up driving, or choose not to, people living with disabilities and people of all ages who are unable to afford to run a car, are all disadvantaged in terms of access to their daily needs. Furthermore, existing and potential visitors to rural areas who have similar characteristics and/or do not have access to a car require alternative transport provision.

   In addition, even where alternatives to private cars are provided, issues around accessibility of provision, personal security and safety can impact on some people in communities more than others including women, older people, the young and those living with disabilities.

[2] Climate emergency declarations in the United Kingdom - Wikipedia
[3] Driving change: How "Avoid & Shift" targets can transform land transport - Climate Champions (unfccc.int)
[4] UK Disability Statistics: Prevalence and Life Experiences (August 2023)

Our third Grand Challenge seeks to address these issues and provide more equitable rural transport options for all.

4. **How can accessing daily needs be made more affordable for residents and visitors?**

   Rural residents spend a higher proportion of their income on transport than their urban counterparts (14.2% compared to 9.9%) and are more likely to be living in fuel[5] or transport poverty. A key challenge for rural areas is therefore not only increasing the reach of services and making them operationally sustainable but also enabling them to be affordable for all people to use. That may mean making transport cheaper for individual users.

5. **How can the needs of rural communities be met more locally?**

   Transport is a "derived demand", generated by people accessing their daily needs. In recent years, rural areas have seen a continuing decline in local services including schools[6], post offices[7], shops, pubs, banks and more, meaning that residents and visitors need to travel further to reach them.

   This loss of services has a range of impacts including on time spent travelling, affordability of travel and more limited access in general, particularly for those for whom longer distance travel is more difficult.

   This Grand Challenge predominantly focuses on increasing the provision of services within rural areas – potentially through more innovative formats including online, mobile or shared service provision to increase accessibility and reduce the need to travel longer distances. Such services could include, for example, retail including hot food, local authority services, banking, post office, health care or pop-up leisure facilities.

6. **How can tourism-related mobility become more sustainable?**

   The tourism industry is vital to the South West economy, with key attractions including stunning coastlines, landmarks and festivals. Destinations in the South West comprise the largest staying UK visitor market (outside London)[8] and whilst the tourism sector is still below pre-pandemic levels, it represents 9% of GVA in the region and supports the wider rural economy (including over 130,000 jobs), stimulates a dynamic environment to do business, encourages inward investment and delivers a quality of life for its residents.

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[5] They live in a property with an energy efficiency rating of band D or below AND after spending required to heat their home, they are left with a residual income below the official poverty line. Fuel poverty statistics - GOV.UK (www.gov.uk). There is no official UK Government definition of transport poverty but the same approach to residual income could be applied.

[6] Investigation: How 'vital' rural schools are battling closure (schoolsweek.co.uk)

[7] Impact of Outreach and Temporary Closures on Post Office Access - Rural Services Network (rsnonline.org.uk)

[8] Towards 2030 Reimagining the Visitor Economy in The South West - The Great South West Tourism Partnership Prospectus to Build Back Better

However, tourism is a seasonal sector for most of the South West which not only impacts the economy but can have an impact on employment. The seasonality of the tourism sectior can lead to issues of unemployment during the winter or the lack of staff available in the summer as well as challenges of finding affordable homes for both permanent and seasonal residents. The South West's product is also more seasonal than competitor destinations, found in a competitor review conducted by the England's Great South West Tourism Partnership.

Links to other challenges

The figure in Appendix A provides a summary of key issues identified in the Rural Mobility Strategy and those discussed at the stakeholder event in January 2024 (those identified during the audience participation session focused on making rural areas more liveable). The figure demonstrates that the issues and objectives identified through each of these processes can broadly be coalesced into connections between each of those individual challenges and the six Grand Challenges identified for consideration in the development and delivery of the pilots.

The following bullet points show how many of the 29 issues listed have connections to each of the six Grand Challenges:

- Operational sustainability – 15 issues
- Meeting Net Zero – 13 issues
- Equality in mobility – 9 issues
- Affordability of access – 10 issues
- Meeting needs locally – 10 issues
- Enabling sustainable tourism – 12 issues

The figure also demonstrates that the majority of the issues have connections to multiple Grand Challenges and that they generally either directly replicate the Grand Challenges or are component elements of them.

PEOPLE AND PLACES

Overview

A human-centric and place-based approach has been applied to the SWRMS pilot programme to ensure the pilots focus on addressing the needs and activities of those who live, visit and work in the South West region. This approach builds on the work undertaken for the Strategy itself, with further research undertaken to understand mobility users' needs and identify the feasibility of a range of interventions in different rural place types.

Rural People

As part of the SWRMS, a set of resident personas and organisation identities were developed to represent those who live and work in the South West region. As part of the pilot programme, both the resident personas and organisation identities have been reviewed and validated through a series of engagement sessions with people who live and work in the South West. The re-validation process ensured that the previous characterisations were representative and helped to understand the current rural mobility challenges.

To further the human-centric approach to the pilot programme, a series of tourist personas have been developed to understand the mobility needs and challenges of those visiting the South West region.

Resident Personas

The Experian Mosaic consumer classification data used for the SWRMS has been used to inform the revised resident personas for the pilot programme. Experian Mosaic data is a comprehensive cross-channel consumer classification tool that not only provides an insight into consumer lifestyles and behaviours but allows for the understanding of geographical concentrations of the population, which provides a link between the human-centric and place-based analysis used to inform the pilot programme. As such, this data helped to inform the key population groups within the South West region, their characteristics and geographical locations, which can influence travel choices.

There is a total of 15 'first tier' groups and 66 'second tier' types of household classified in the Experian Mosaic data. Of these, 3 first tier groups and 8 second tier rural types of household were chosen to represent the population of the South West, based on their prominence in the region. An additional persona, not based on the Experian Mosaic data, was developed for the pilot programme to represent a resident persona that was felt to be missing from the list.

The personas have all been given a description and an overview of the following:

- Core Values (what the persona values when travelling)
- Purchase Power (affluence and income of persona)

- Tech Confidence (confidence with using technology)
- Concerns / Frustrations (with transport, mobility and associated infrastructure)
- Mobility Assets (what modes does the persona have access to)
- Subscriptions / Interests

The twelve resident personas and their associated classifications used for the pilot programme are presented below, with more detail on each persona provided in Appendix B.


Edward: Wealthy Landowner


Marjorie: Outlying Senior


Catryn: Rural Vogue


Angus: Far Flung Outpost


Dianne: Scattered Homestead


Terry: Senior Security


Ron: Village Retirement


Ellie: Aspiring Homemaker


Helen: Satellite Settler


Howard: Prestige Position


Shane: Local Focus

Jaz: Additional Persona

Organisation Identities

The organisation identities have been developed to represent the prominent industries across the South West, particularly where transport and mobility can play an important role for the organisation. Data from the Office for National Statistics (ONS) for organisations classified by the Standard Industrial Classification (SIC) (developed for use in classifying organisations by the type of economic activity in which they are engaged) helped to inform the proportion of organisations across the place typology were identified.

Research conducted for the SWRMS identified that the SW Rural Productivity Commission identified the three sectors of 'Agriculture, Forestry and Fishing', 'Food and Drink', and 'Tourism' as key sectors in rural areas, particularly in 'deeply rural' areas.

Based on the average proportion of employment in the South West, accommodation and food services, which includes both tourism and food and drink, places 6th out of the 18 sectors and is therefore has one of the larger proportions of employment in the region. On the other hand, agriculture, forestry and fishing places 12th out of the 18 sectors suggesting it is on the lower end of proportional employment across the South West. However, the agricultural sector by nature is a sparse employer, as one or a small group of individuals will farm large hectares of land.

Nevertheless, the employment data has informed the development of the SWRMS pilot programme organisation identities, which are overviewed below and elaborated on in Appendix B.

Dairy Farmer
Agriculture, Forestry and Fishing

Biotech Manufacturer
Manufacturing

B&B
Accommodation and Food Service Activities

Electrician
Construction

Local Souvenir Shop
Wholesale and Retail

Care Worker
Human Health and Social Work Activities

Tech Start-up
Information and Communication

Local Theatre Group
Arts, Entertainment and Recreation

Tourist Personas

Tourist personas have been developed to represent those travelling to, and within, the South West for leisure trips. In total, ten tourist personas have been developed, with varying attributes, purposes, destinations, and travel needs. The tourist personas are presented below, with further details provided in Appendix B.


Outdoor Adventurer

Event Spectators


Coach Trippers


Event Participants

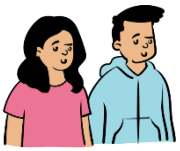

Family Day Trips


Family Beach Holiday


Local Leisure


Volunteers


Luxury Break


Young Couples

Rural Places

As was made clear by the SWRMS, there is no one single type of rural place. Indeed, arguably, rural places are more diverse in their characteristics, due to their greater variation in scale, than urban counterparts. The South West covers nearly 20,000km^2 in total and we identified 23 different types of rural place in that areas, based on an assessment of:

- Locations within and outside of settlement boundaries.
- Size of settlements (e.g. towns, villages and hamlets).
- Remoteness.
- Inland or coastal (including estuarial and island) locations.

Of the nearly 1,000 settlements in the South West, there are 270 rural towns and 554 villages and larger hamlets. In addition, there are smaller hamlets and numerous areas outside of settlement boundaries. The complexity of our rural places increases when consideration is also given to other aspects of geography and economy including:

- Topography, including those in upland and lowland areas,
- Locations under the protections of national park or national landscape designations.
- Differing economic focuses including agriculture and tourism.

- Levels of services provided, particularly within settlements such as retail, education, healthcare, etc.
- Levels of affluence within local communities.

An analysis of all these characteristics would reveal even more types of rural place and highlight the complexity of different contexts our countryside and coastal places have. All these characteristics have an impact rural mobility both in terms of demand for it and how it is provided.

Rural mobility pilots therefore must consider the context of the places that they will be operated in. An understanding of this can help to identify the challenges for rural mobility, the context for current provision, where and why demand exists, and which solutions may or may not work. However, going back to personas, a key aspect above all the others may be the communities living in those areas and their specific needs and capabilities to support rural mobility pilots.

THEORY OF CHANGE

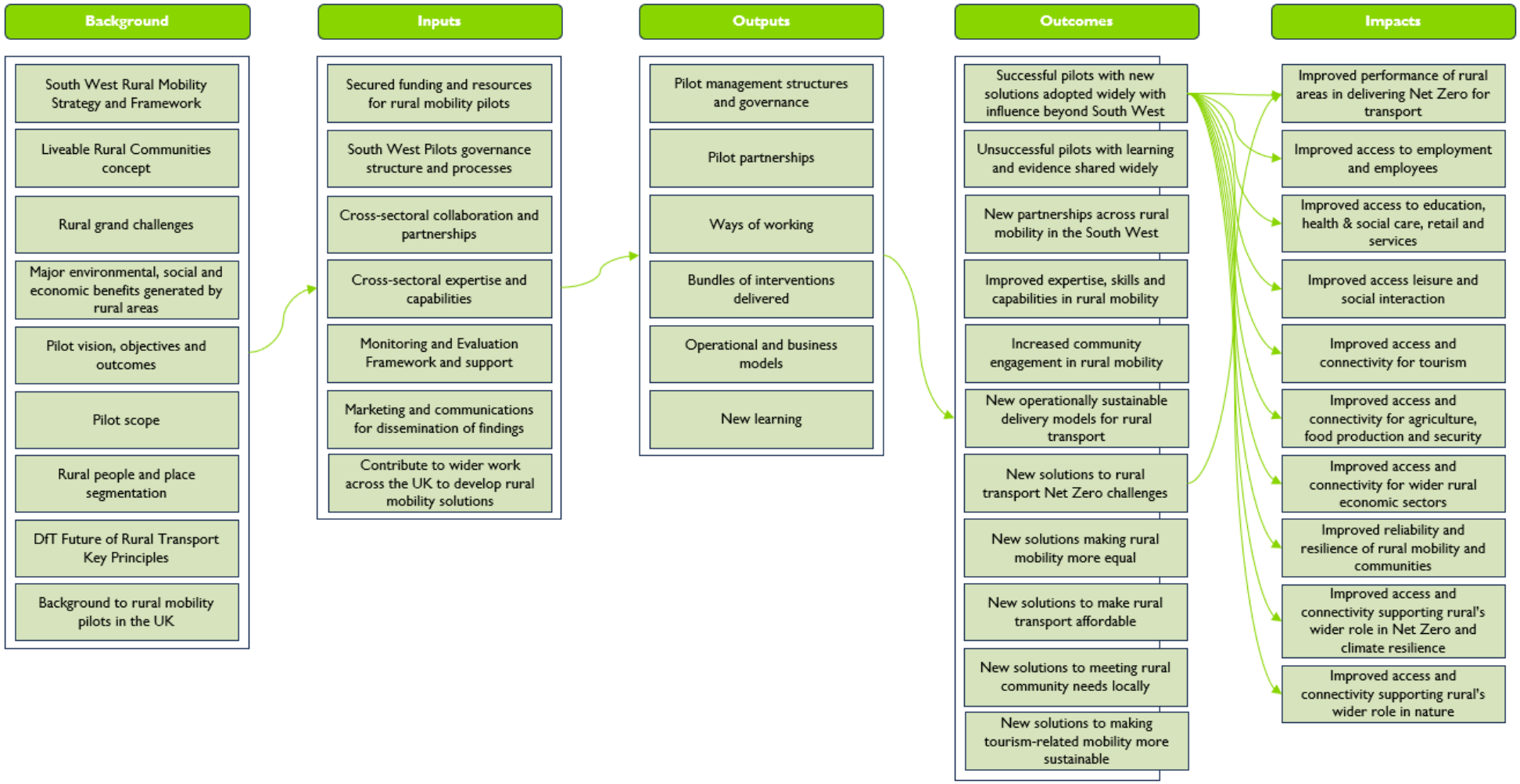
Background

Understanding the flow from problems through intervention and eventually achieving wider outcomes is important to considering how pilot projects might successfully achieve the stated vision and objectives. A standard Government approach to support this thinking is to develop a Theory of Change and supporting logic map. Provided overleaf is a logic map for the rural mobility pilot programme, setting out the key elements of background, the inputs, outputs, outcomes and wider impacts. The links between the outcomes and impacts have been simplified to increase clarity of the mapping.

Appendix C presents a more detailed theory of change.

The theory of change should be central to the monitoring and evaluation of the programme of pilot projects. In addition, the theory of change will need to be adapted for use in individual pilot projects and used in their own monitoring and evaluation plans and activities.

Theory of Change



POTENTIAL PILOTS

Introduction

The 'Call for Pilots' process resulted in the submission of nine pilot proposals across the South West. Whilst most of the submissions proposed pilots in the Western Gateway area, they provided the basis for the development of ten pilot concepts that could be trialled across the whole region. The pilot concepts build upon the submitted pilot proposals and aim to provide practical examples of pilots that could be trialled in the South West and a guide to potential pilot projects that may be supported by the STBs.

Pilot Concepts

Though the pilot concepts build on the 'Call for Pilot' proposals, they incorporate a series of interventions, referred to as 'pilot concept bundles', that are based on the long list of interventions assessed as part of this study and have been developed to align with the scope set out during the 'Call for Pilots'.

The scope used for the pilot concepts is detailed in the next chapter but has been summarised below to provide a context for the pilot concepts overviewed further in this chapter.

Call for Pilots Scope

Scope Element	Overview
Liveable Rural Communities	All pilot projects should be founded on the principle of delivering more liveable rural communities.
Grand Challenges	Each pilot must consider how it helps to answer the grand challenges set out earlier in this document.
Geography	Pilot projects should consider the geographical factors to the identification of optimum interventions for their chosen area.
Funding	Pilot projects should consider the required sources of funding and resources to deliver the pilot, in addition to that provided by the STBs.
Timescale	The pilot projects should aim for a minimum of 12-months of steady state operation.
Delivery Model	Pilot propositions should consider who will be the delivery lead (public, private or third sector parties).

Specification Approach	Pilot projects should consider different approaches to specifying their delivery; based on either outputs or outcomes.
Forms of Transport	Pilot projects should have a focus on decarbonised, active, publicly available and shared forms of transport and local journeys rather than longer distance travel.
Users and Activities	Pilot projects should be based on the consideration of the needs and challenges users have in rural mobility and the activities of those users.
Carbon Management	Pilot proposals should consider the 'Avoid, Shift, Improve' approach to decarbonising mobility.

The pilot concept bundles include small scale infrastructure interventions and new services that are likely to benefit from being implemented alongside similar interventions and can be delivered in a relatively short timescale (<2 years). The pilot concept bundles do not include larger-scale infrastructure (such as new rail lines and stations, large active travel routes or highway capacity or safety improvements) as these will have a significantly longer delivery timescale and are likely to cost significantly more to implement in time, materials and resources.

An overview of the ten pilot concepts is provided below. Dashboards are provided in Appendix D to show how each pilot concept aligns to the scope.

Pilot Concept 1: Tourism Aggregator

The Tourism Aggregator pilot aims to facilitate car free tourism through the aggregation of travel and tourism services, which could reduce the need for tourists to take their cars on holiday. This pilot would enable visitors to book a range of services alongside their accommodation to give them access to the daily needs they would often require a car for, such as food shopping, all while providing them with a range of alternative modes of transport and incentives to use the service (such as discounted ticket entry to tourist attractions).

Pilot Concept 2: Tourism Links

The Tourism Links pilot considers how to connect communities and support the travel needs of tourists in the region. It aims to create sustainable modal shift in the tourism sector whilst also supporting first mile / last mile journeys between tourism attractors and main transport hubs such as rural mobility hubs or existing rail and bus stations, whilst enabling tourists to access real time information and integrate their tickets for a multi-modal journey.

Pilot Concept 3: Accessibility for All

Accessibility for All aims to support those with long- or short-term disabilities, as well as those who struggle physically to access their daily needs, including employment, healthcare, education and leisure activities within rural and coastal places. A specific focus of this pilot concept is to improve physical accessibility by creating a universal basic level of mobility across rural and coastal places in the South West and providing volunteer and transport sharing services that can improve accessibility to key services for people with specific and/or challenging mobility needs.

Pilot Concept 4: Rural Safety

This pilot concept recognises than different customers can experience feeling unsafe whilst travelling at different times and whilst using different modes based on personal circumstances. As such, it aims to improve traveller safety for all users of the rural mobility network in the South West whether this is improving perceived safety or physical safety.

Pilot Concept 5: Community-led Decarbonisation

This pilot concept aims to support journeys to key services through community-led electrified and active travel to encourage sustainable modal shift. The interventions will be largely led by volunteers and communities and will be supported by revenue from community energy generation.

Pilot Concept 6: Active Travel

The pilot concept aims to encourage the uptake of active travel in rural and coastal places by providing the services and infrastructure to support intra-community journeys made by cycles and creating a safer environments for them when they travel.

Pilot Concept 7: Rural MaaS

A Rural MaaS pilot concept would look to build upon the experience of existing MaaS trials (including one currently being developed in the Western Gateway area) to apply the concept to rural and coastal places. This pilot concept would offer multi-modal end-to-end journeys through a unified service offering across all mobility providers and offer targeted travel solutions.

Pilot Concept 8: Digital Demand Responsive Transport

The Digital Demand Responsive Transport (DDRT) pilot concept will look to trial DDRT and associated interventions across rural and urban boundaries to ‘plug the gaps’ in public transport networks and support access to key daily services between rural and urban settlements. It will particularly support off-peak travel, where public transport is often unreliable during this time.

Pilot Concept 9: Rural Freight

This pilot concept has a specific focus on rural freight, with an aim to develop new solutions for freight and deliveries in rural and coastal areas. Whilst the pilot concept will include mobility solutions to enhance deliveries, it will also consider opportunities to merge freight and delivery services with passenger services to improve the efficiency of delivery services and encourage more sustainable alternatives for freight.

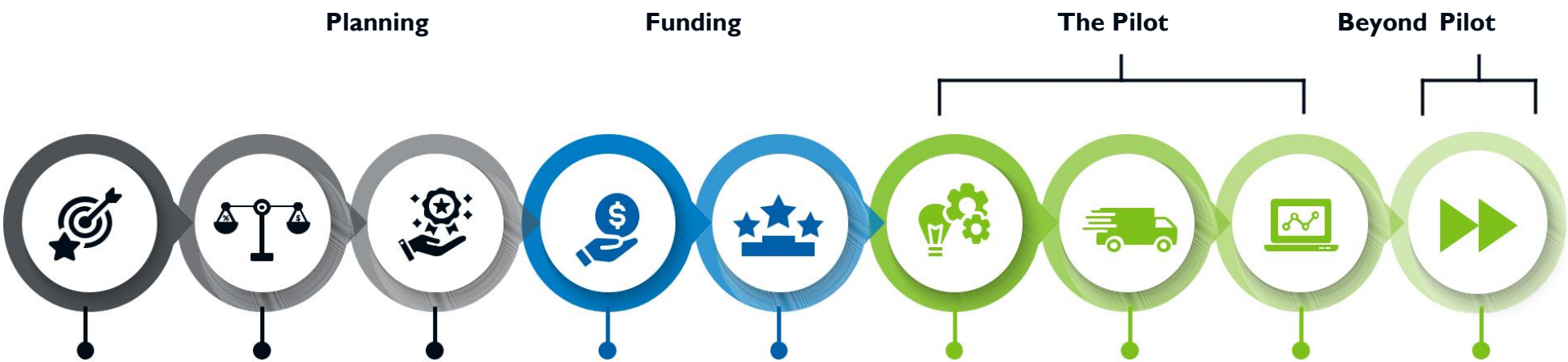
Pilot Concept 10: Alternative Services Models

The tenth and final pilot concept looks at an alternative services model which aims to reduce the number and length of journeys made from rural communities to key services by providing more services directly into rural and coastal areas.

PILOT ROUTE MAP

Outlined below is a route map for developing and delivering a pilot project within this programme and the following diagram provides an overview. This sets out the key stages in the process from initial definition of the challenges to be resolved to what happens beyond the pilots. This Technical Annex supports the prospectus by providing a more detailed commentary on the route map.

While **we propose to take a proportionate approach to applying the route map**, particularly with current STB funding contributions funding levels being limited, we need to ensure that the pilot programme is based on robust understanding, analysis and planning to both ensure value for money and that pilot projects have the best possible opportunity to succeed. The route map should be applied proportionately and for the funding applications in the 2024/25 financial year, applicants will need to demonstrate consideration of the route map stages. If greater levels of funding are made available in future years, supporting larger pilot projects, we would expect applications to present more comprehensive analysis for each of the route map stages.



STAGE 0 Defining the challenges

STAGE 1 Assess Feasibility

STAGE 2 The Pilot Proposition

STAGE 3 Application for funding

STAGE 4 Evaluation and award of funding

STAGE 5 Develop

STAGE 6 Delivery

STAGE 7 Monitoring and Evaluation

STAGE 8 Forward Plan

Piloting Route Map

Stage 0 – Defining the challenges	
0.1 Identifying the need for a pilot	A lead organisation defines the need for a pilot based on identifying a key problem or opportunity within rural mobility that currently does not have a sustainable solution. This should relate to one or more of the six grand challenges: • How can rural transport be made more operationally sustainable (including funding) in the long term? • How can the net-zero challenge be met in rural areas? • How can rural mobility be more equal for residents and visitors? • How can rural transport be made more affordable for residents and visitors? • How can the needs of rural communities be met more locally? • How can tourism-related mobility become more sustainable?
Stage 1 – Assess Feasibility	
1.1 Engage with partners and stakeholder	To develop the pilot proposal, engagement should be undertaken at the earliest opportunity with relevant potential partners and stakeholders to refine the challenges, secure support and ensure involvement in the pilot from feasibility beyond.
1.2 Defining the area	To deliver Liveable Rural Communities, the pilot projects should consider networks of settlements working together and the connectivity between them. Where pilot projects focus on single settlements or sites, they will need demonstrate how the benefits of their pilot support the surrounding area. Beyond this minimum scope, where possible, the geographical scope could extend to further settlements. In developing pilot propositions, consideration should be given to the types of place they will support, the specific characteristics of those places and how they influence rural mobility and the development of the pilot. For example, the following could be considered: • Size of settlement e.g. market town, village, hamlet or standalone locations. • Remoteness: locations categorised as remote or not remote in the rural mobility strategy. • Inland or coastal including locations on the coast or major estuaries or on islands. • Locations within or outside National Parks and National Landscapes.
1.3 – Defining the people and	Pilot projects should be based on the consideration of the needs and challenges customers have of rural mobility. They should consider

their activities	current users of rural mobility, and the activities they undertake, as well as those who might use rural mobility in the future. Pilot projects could support communities as a whole or focus on the specific needs of particular groups, such as tourists or people with disabilities or mobility impairments. Pilot projects should consider the use of the personas and identities (resident, tourist and organisational), set out earlier in this Technical Annex, to support specifying who the pilot projects will aim to support.
1.4 – Identifying current provision in the area	An understanding of current mobility operations in the area should be generated. The pilot project should, wherever possible, build on and complement existing operations rather than looking to replicate or replace them.
1.5 – Identifying the wider policy context	The wider policy context for the pilot project should be understood. This should include local authority policy such as the Local Transport Plan and Local Plan as well as wider policies of the lead organisation, partners and stakeholders. Cognisance should also be given to relevant sub-national and national policy including the DfT's future of rural transport policies and nine key principles.
1.6 – Review of previous pilots	Previous pilots that have considered the challenges should be reviewed for their outcomes and lessons learned. Pilots supported by the STBs should not look to repeat previous pilots unless they are applied to different groups of users, different places or within bundles of other solutions.
1.7 – Refining the challenge	Based on the previous sub-stages, the challenges to be faced by the pilots should be refined and agreed with partners and stakeholders. The development of a well-defined hypothesis may be useful in forming shaping the resulting pilot.
Stage 2 – The Pilot Proposition	
2.1 – Defining the outcomes	A vision and set of SMART objectives should be developed for the pilot. The vision and objectives for the pilot programme should be the starting point but they should be refined further to consider the specific challenges being faced. These should also be steered by the aims to develop of Liveable Rural Communities. Based on that developed for the STB's rural mobility pilot programme, proposals should develop a tailored theory of change and logic map to demonstrate how a pilot could achieve the defined outcomes.
2.2 – Defining and selecting the	The SWRMS developed suggestions for bundles of interventions for different rural areas. Pilot projects should consider how the delivery

possible solutions	of multiple integrated interventions (bundles) can work together to maximise rural mobility improvements. There should be a general presumption towards a focus on low or zero carbon, active, publicly available and shared forms of transport. Furthermore, the focus should be on local transport rather than strategic/longer distance transport (although interchange between the two can be within scope). Pilot projects must not replicate bundles piloted elsewhere unless they are applied to different use cases (i.e. different place types, customers, journey purposes or modes.) A range of possible solutions to the challenges should be considered alongside the potential option of doing nothing. A range of options should be identified, and their feasibility considered including technological, commercial and customer readiness, their potential benefits and costs, and their deliverability as part of a pilot. These should then be appraised against the pilot vision and objectives to identify those most likely to be higher performing. The long-term sustainability of options would be tested through the pilot. A bundle of individual options should be defined, based on the outcome of the feasibility assessment. The rationale, expected outcomes, specific locations and key dependencies should be set out. The impact on carbon management should be part of these considerations. Pilot proposals should consider the 'Avoid, Shift, Improve' approach to decarbonising mobility and consider how carbon can be reduced through each stage of the pilot process. The solutions should be innovative and not have been subject to pilots or established delivery individually with the same use cases and types of locations.
2.3 – Approach to partnering, roles and responsibilities	The pilot projects could test delivery through different sector leads such as: • Public sector e.g. local authorities and health or education sectors • Private sector e.g. mobility operators • Third/community sector e.g. parish councils, charities or community groups Pilot projects should include partnerships across sectors both within

	and outside of transport – the scale of these partnerships will vary on the specific proposals for each pilot. The approach to joint working between the pilot project lead, partners, stakeholders and funders should be clearly set out with well-defined roles and responsibilities. Pilot projects should co-operate with others across the South West, and beyond.
2.4 – Approach to specification and delivery models	The approach to be taken to specifying the pilot project should be defined clearly alongside the expected delivery model/s. Consideration should be given to whether an outcome-based or output-based approach to specifying the pilots is applied. The former identifies the specific bundle of options to be tested, and the pilot project set up deliver them. The latter identifies in more detail what the outcomes are to be achieved and identifies a budget with which to achieve them but leaves open to potential providers exactly what options are piloted to deliver them. The delivery model for the pilot should be developed.
2.5 – Pilot project programme	A detailed programme for developing, delivering, monitoring and evaluating the pilot project will need to be developed. It is expected that pilots would operate for a minimum of one year to enable operations during different seasons to be monitored and for sufficient evidence to be gathered. Where funding allows, up to three years of operation may be considered.
2.6 – Defining the governance	The approach to governing the pilot project should be developed and, where possible, building on existing governance arrangement. A clear decision-making structure and process should be agreed with partners which should be based on clearly defined roles, responsibilities and levels of accountability with appropriate organisational sponsorship and oversight. Care should be given to working withing existing organisational approval processes and cycles including identifying what approvals and permissions are needed at each stage of development and delivery. Where funding is provided by the STBs, they would expect to sit on the project board.
2.7 – Defining the costs and benefits	Based on costs and benefits of individual pilot options, an assessment should be made of the overall pilot project costs and potential benefits. Costs should consider the development, launch and operation of the pilot alongside costs for governance, marketing and

	communications, monitoring & evaluation and the potential decommissioning of infrastructure and services as the end of the pilot project.
2.8 – Approach to funding and resources	Each pilot project will need to develop a funding and resource plan to demonstrate a robust operational model to develop and operate the pilot. This should include details of all costs and potential the sources of all finances including any requests for funding from sources outside of the lead and partner organisations (including requests to the STBs). The financial plan does not need to be restricted to monetised items and may cover other resources (including 'in-kind' items) provided by the lead and partner organisation. The timescales, processes and approvals for obtaining funding should be clearly set out.
2.9 – Define approach to monitoring and evaluation	Building on the Monitoring and Evaluation Framework for the Rural Mobility Pilot Programme (see Section 8 of this Annex), each pilot project should develop its own Monitoring and Evaluation Plan. This should be proportionate to both the overall scale of the project and the scale of any funding provided through the STBs. Where other sources of funding have Monitoring & Evaluation commitments attached to them, a hybrid approach may be necessary to take account of all requirements set out.

Stage 3 – Application for funding

To secure STB-facilitated funding an application to the STBs will need to be submitted.

This will be a proportionate approach depending on the scale of funding available, so that the cost of making an application is not disproportionate to the scale of funding being requested.

However, as a minimum, all applicants will need to demonstrate that they have considered each step set out in Stages 0, 1 and 2.

Stage 4 – Evaluation and award of funding

Applications for funding will be assessed as follows:

- The robustness of the both the process taken to develop proposals and of the proposals themselves.
- The extent to which the proposal meets the piloting scope and route map stages.
- The level of stakeholder engagement undertaken to develop the proposals.
- The level of funding requested and the extent of other funding secured.
- The strength of the Monitoring & Evaluation Plan.

Stage 5 – Develop

Once funding has been secured, the lead organisation will work with partners to develop the pilot project in more detail including more detailed option selection, design, approvals, procurement and completing any statutory processes.

The first task at inception should be the development of a robust Project Initiation Document (PID).

Consideration will need to be given to a range of specific issues and, where appropriate high level or detailed strategies or plans developed. Key issues could include, but not limited to, in addition to those usually considered in the PID:

- Design
- Operations
- Stakeholder and user engagement
- Marketing and communications
- Procurement
- Planning
- Maintenance
- Decommissioning

A condition of funding provided through the STBs will be the relevant STB being integrated within the governance arrangements including sitting on the pilot project board (or equivalent).

Stage 6 – Delivery

The delivery stage comprises the launch and operation of the pilot. Depending on the individual pilot project, this could be a single launch or a series of launches including BETA-testing and phased implementation.

Stage 7 – Monitoring & Evaluation

Monitoring & Evaluation should be undertaken in accordance with the Monitoring & Evaluation Plan including the process, output and outcome evaluation. Evidence supporting the evaluation should be gathered throughout the project from kick-off, through development, launch and operation.

A condition of funding provided through the STBs will be regular and timely provision of evaluation outputs and sharing of lessons learnt, both with the STBs and with wider interested stakeholders.

Stage 8 – Forward Plan

All successful pilot projects, where there is agreement that they are to become established for the long term beyond the pilot project stage, should develop forward plans. The plans should both set out how the pilots will be continued into long term delivery after priming funding ends and set out how the learnings from the pilot will be applied more broadly by the project lead and partners and shared with others.

STB ROLES, PARTNERING AND FUNDING

Developing solutions with partners

Working with partners, stakeholders and the public will be vital to developing and delivering the programme of pilot projects. From talking to organisations involved in rural mobility and rural areas, we have found the clearest message was one promoting partnering, taking a cross-sectoral approach that reaches beyond traditional transport stakeholders. This was reinforced by our 'Call for Pilots' exercise where submissions were consistent in suggesting pilot projects bring together a range of rural organisations to deliver them. Forming partnerships that pair deep understanding of the challenges specific to rural areas with the innovative ideas that provide opportunities to resolve those grand challenges is vital to meeting the needs of countryside and coastal communities.

Furthermore, to deliver truly 'liveable' rural communities, the people who live and work in, and visit, the pilot areas must play a role in piloting potential mobility solutions. Pilot projects must be developed on the basis of a clear understanding of the needs and challenges of the communities they serve and, where appropriate, they could be delivered by those communities themselves.

We have developed clearly defined roles and responsibilities for organisations involved in pilot projects, but we also see the public, both users and non-users, as being central to the programme.

The STBs, Peninsula Transport and Western Gateway have a role to drive the programme, shaping its vision and scope, providing funding and support to the individual projects, facilitating partnering and sharing best practice, and supporting the dissemination of pilot findings. The STBs do not envisage being involved in the day-to-day development and delivery of the pilots, which the exception of sitting on project boards (or similar).

Our ask of prospective Pilot Leads, a number of which have come forward through our 'Call for Pilots', is to continue with the ambition so many have already shown. The Leads, whether they be public, private or third sector, will drive the individual pilot projects, leading and working with other roles to engage with stakeholders and users, identify the challenges, develop the pilot proposition, secure funding, develop and deliver the pilot, lead monitoring and evaluation, and set out the post-pilot forward plan.

The submissions to the 'call for pilots' identified interest from a range of potential pilot leads including the following:

- Local highway authorities
- Town or parish councils
- Community rail partnerships and other community groups
- Private sector mobility service operators

However, the role could be performed by a much wider range of other organisations across the sectors including, but not limited to, local planning authorities, other public sector organisations (such as in health or education), bus and train operator, developers, local charities, community interest companies and community groups.

In the majority of cases, pilots cannot be delivered by a single organisation and the Pilot Partners will have a key role in supporting the pilot leads to both shape and deliver the pilots. Partners could play either passive or active roles during the development and delivery stages. Partners could take a passive role through providing funding or a more active role by providing other resources and delivering the operational elements of the pilot (e.g. delivering infrastructure or operating a service).

Pilot partners could span public, private and third sectors and many pilot projects may have a combination of organisations across those sectors.

The **Pilot Stakeholders** will provide the leads and partners with their insights, helping to shape the proposition, development and delivery. The stakeholders will also play a role in the monitoring of the pilots through providing views on its success, or otherwise. The stakeholders may include organisations that support or represent users.

Finally, similarly to stakeholders, the **Pilot Users** will play an important role in the delivery of the pilot projects providing the leads, partners and stakeholders with their insights, helping to shape the proposition, development and delivery. The users will also play a role in the monitoring of the pilots through providing views on its success, or otherwise.

We already work closely with our colleagues across **the other five STBs** including with Transport East on rural mobility issues, and we commit to continuing to do so through the development and delivery of pilots, sharing thinking and lessons learned.

How will the programme be funded?

Our rural mobility strategy, reinforced by further stakeholder engagement and the 'Call for Pilots' exercise, revealed a breadth of ambition in delivering pilots which also demonstrated a range of potential scales of funding required. While detailed pilot propositions have yet to be developed, if the pilots identified by the exercise were to be delivered, the smaller projects may

require funding of under £50,000. This is broadly in line with the funding proposed by the STBs for one pilot project in each of the two areas.

Larger scale proposals could require funding equivalent to those delivered through the DfT's Rural Mobility Fund, which provided projects with between £660,000 and £1.5m, amounting to a fund of £19.4m over 17 projects. In comparison, the DfT's, largely urban focused, Future Transport Zones received between £15m and £28.8m each.

The funding requirements for the pilot programme would include:

- Operational funding to support the STBs to lead the programme and support the pilot project leads, including, but not limited to, governance, engagement, guidance, monitoring and evaluation, and dissemination of findings.
- Funding to support the development, delivery, monitoring & evaluation and forward planning for pilot projects.

Currently, the STBs have some funding within their existing budgets to support each of these areas of funding at a small scale, including very limited delivery of pilots. We expect all pilot propositions to include a proportion of match-funding and provision of other resources alongside that provided through the STBs. The 'Call for Pilots' supported our understanding that there is a wide range of potential sources of funding that pilot propositions could call upon. These could include, but is not limited to:

- Existing local authority including those reallocated from existing transport and wider operations
- Central government funding awarded to local authorities for transport, economic development and cross-sectoral delivery
- Private sector funding from operators and local businesses
- Local community organisations funding including from existing community transport and community energy company sources.

The ambition of Peninsula Transport and Western Gateway is beyond the limited scale of what could be achieved through their existing budgets. Through the prospectus, we are therefore calling on our partners to come together to collectively fund a programme of pilot projects that can demonstrate how we can resolve some of the grand challenges our rural communities face.

MONITORING AND EVALUATION

Overview

Monitoring and Evaluation (M&E) is key to ensuring the pilots trialled in the South West will shape, develop and improve rural mobility across the region. M&E will allow for a robust approach to observing the delivery and performance of the pilots, whilst also ensuring that the lessons learned from the pilots (through success or failure) are disseminated across the region. As the details of the pilots are yet to be confirmed and defined, this M&E approach is intended to apply to the overall pilot programme. Once defined and confirmed, each pilot will be expected to prepare its own pilot specific M&E plan based on the M&E framework set out below. Due to the scale of funding available from the STBs for 2024/25 being relatively modest, expectations in this regard on pilot projects which receive funding from the STBs will be proportionate. The M&E framework set out below is therefore provided to both give an indication of the key themes a proportionate approach should consider while providing guidance for more significant M&E activity if more significant funding becomes available.

The M&E Framework

The M&E framework for the pilot programme is based on the Theory of Change presented earlier in this document to ensure the delivery of the pilots support the outcomes, outputs and ambitions they are expected to achieve. As such, a two-stage structure has been developed for the M&E framework, which is as follows:

- **Stage 1 Monitoring**: regular quarterly monitoring of the pilot performances against the outputs set out in the Theory of Change.
- **Stage 2 Evaluation**: annual evaluation of the performance of the pilot process and the pilot performance against the outcomes set out in the Theory of Change.

Stage 1: Monitoring

The regular monitoring of the pilots should be a key focus of the programme to ensure the pilots are delivering the expected outputs, as set out in the Theory of Change. Regular monitoring of the pilots themselves will also ensure that any problems or issues with the pilot can be identified in the early stages of pilot delivery. As such, the pilots are expected to be monitored quarterly. This monitoring process will help to answer the key question; *how are the pilots progressing the delivery of the Theory of Change outputs?*

An indicative list of indicators to be used in the pilot monitoring process has been derived to identify whether the pilots are achieving the outputs and sub-outputs set out in the Theory of Change and are collecting the necessary data for monitoring. Not all the indicators will be applicable to each pilot, and a proportionate approach should be taken. It is also expected that the pilot specific M&E plans would identify specific figures for the indicators and set a timeframe for when they will be achieved.

Monitoring Indicators

Output	Sub-output	Indicator(s)	Research Methods
Pilot Management Structures and Governance	New management, structures and processes that enable pilot deployment of rural mobility. New management, structures and processes that enable sustainable delivery of rural mobility beyond pilots.	Management structures set up with organisational chart.	Pilot level monitoring
Pilot Partnerships	Development of partnerships to secure and distribute funding. Development of partnerships to develop, manage and operate pilots. Development of longer-term partnerships to apply learning across the rural South West and beyond.	Number of organisations partnered with. Amount of funding received. Number of pilots funded. Number of pilot managers appointed. Partnership structures and agreements in place. Number of partners across the rural South West.	Pilot level monitoring Programme level monitoring
Ways of Working	A co-operative approach at a programme level, between pilots and within individual pilots. A robust, standard and transparent approach to risk management across the pilots, accepting appetite to risk may vary across pilots and that risks may need to be shared across partners.	Ways of working code of practice document produced. Risk management processes established including risk register. Regular sharing meetings. Number of lesson learned workshops.	Pilot level monitoring

	'Fail fast', learn and apply thinking rapidly. An open approach to generating and sharing learning within pilots, across the programme and beyond. A standard approach to reporting on pilots both periodically and at the end of pilots.	Number of bilateral meetings between pilots. Develop quarterly monitoring reports and annual evaluation reports.	
Bundles of Interventions Delivered	Different bundles will be delivered across pilots unless different use cases are applicable. Bundles may be a combination of services and infrastructure. Bundles will be delivered with permanency in mind. Bundles may include the application of new technologies but may also include existing technologies within new use cases. Consideration of how bundles can be scaled and applied to different uses cases.	Number of different bundle of interventions delivered. Number of service bundles delivered. Number of new solutions applied. Application of existing solutions to new use cases and places.	Pilot level monitoring Programme level monitoring
Operational and Business Models	Development of new models for deployment of individual and/or bundles of interventions in pilots. Development of new models for longer term deployment of individual and/or bundles of interventions beyond trials.	Number of successful new operating models for longer term deployment.	Programme level monitoring

New Learning	New cross-sectoral learning, skills and expertise in developing and deploying rural mobility solutions. Dissemination of learning from pilots to partners, stakeholders, across the South West and around the UK and beyond.	Number of learning, skills and expertise developed. Capacity of organisation increased to deliver new solutions.	Pilot level monitoring

The monitoring of the pilot indicators will be presented in quarterly monitoring reports in a visual dashboard format prepared by the Pilot Project Manager. The Pilot Programme Manager will be responsible for preparing a reporting template for the quarterly monitoring reports to ensure consistency in reporting amongst the pilots.

Stage 2: Evaluation

The second stage of the M&E process will focus on the longer-term performance of the pilots, evaluating how they are being delivered (process evaluation) and how the pilots are achieving the outcomes set out in the Theory of Change (outcome evaluation).

It is expected the pilots will be evaluated on an annual basis or at project completion, whichever is sooner.

Process Evaluation

The process evaluation will primarily focus on how pilots are being delivered and what can be learned from the development, planning and operation.

The key question the process evaluation of the pilots will answer is: **how are the pilots being delivered?** The table below sets out an indicative list of process evaluation questions to be assessed as the pilots are delivered. The final process evaluation questions specific to the details of the pilot will need to be set out the individual pilot project M&E plans, with justification provided for any evaluation questions not included.

Process Evaluation Questions

Process	Evaluation Questions	Evaluation Sub-Questions
Proposition	• How were the pilot propositions formed and developed?	• Were a range of partners involved and did they work collaboratively? • Were other pilot propositions considered and, if so, why were they discounted?
Design	• How was the design process in	• Were there any challenges in designing the pilots?

	developing the pilots?	• Was the design process efficient and collaborative?
Decision-making	• How were decisions made?	• What decisions were made? • How were the decisions made? • What impact did the decisions have?
Authorisation and permissions	• How was the process for securing authorisations and permissions?	• Were there any delays in securing authorisations and permissions?
Procurement	• How was the procurement process?	• How were partners identified and procured? • Were there any barriers in the procurement of solutions? • Were they any delays in procurement?
Delivery	• How was the delivery of the pilot?	• Were there sufficient resources to deliver the pilot? • Were the any delays in the deliver? • Were there any external factors that impacted delivery? • How was change managed? • What has gone well? • What has gone not so well?
Regulation (where appropriate)	• Were new regulations required?	• Were new regulations required to operate the solutions? • How were these new regulations developed?
Knowledge sharing	• How has lessons learned been shared?	• What mechanisms were in place to ensure lessons learned from the pilot can be applied to future rural mobility pilots?

		• How were the lessons learned effectively captured, documented and shared with key stakeholders?
Marketing and communications	• How were marketing and communications?	• How were the marketing and communication activities planned and executed? • What communication was had with the public, stakeholders and authorities throughout the pilot process?
Budget	• How was the budget	• Was all the allocated budget spent? • What did the pilot spend to budget?

The process evaluation will be led by the Pilot Project Manager using qualitative techniques to gather information required to answer the process evaluation questions. Such techniques could include semi structured interviews with key stakeholders or project staff, or facilitated discussion at team meetings, and will be set out in detail within the pilot M&E plans.

Reporting of the process evaluation will be presented in annual evaluation report prepared by the Pilot Project Manager, or at the end of the pilot, whichever is soonest. The Pilot Programme Manager will be responsible for preparing a reporting template for the annual evaluation reports to ensure consistency in reporting amongst the pilots.

Reporting of the process evaluation will follow a similar flow to the stage 1 monitoring, as shown in the table above.

Outcome Evaluation

Long term evaluation of the pilots should be a key focus to ensure the outcomes the pilots are expected to deliver are being realised.

The key question the outcome evaluation of pilots will answer is: **how are the pilots progressing in the delivery of the Theory of Change outcomes?**

The table below sets out an indicative list of outcome evaluation questions to be assessed as the pilots are delivered. As with the process evaluation, the final outcome evaluation questions specific to the details of the pilot will need to be set out the individual pilot M&E plans, with justification provided for any evaluation questions not included.

Outcome Evaluation Questions

Outcome	Evaluation Questions	Evaluation Sub Questions
Successful pilots with new solutions adopted widely with influence beyond South West	• How have new solutions been adopted?	• What specific new solutions have been adopted? • Where have these new solutions been adopted? • What has been the influence of these new solutions beyond the South West? • Could the pilot be used to support funding into further rural mobility solutions?
Unsuccessful pilots with learning and evidence shared widely	• How have lessons learned from unsuccessful pilots been widely shared?	• How have lessons learned been shared amongst the other pilots? • How have lessons learned been shared more widely by the STBs?
New partnerships across rural mobility in the South West	• What new partnerships have been made across rural mobility in the South West?	• How many new partnerships have been made? • Which sectors to these partnerships cover? • How were the working relationships with partners?
Improved expertise, skills and capabilities in rural mobility	• What expertise, skills and capabilities have been learnt?	• What expertise, skills and capabilities have been learnt or improved? • How have new or improved expertise, skills and capabilities been applied to other projects?
New operationally sustainable delivery models for rural transport	• How can rural transport be made more operationally sustainable (including funding) in the long term?	• What new operationally sustainable delivery models for rural transport now exist in rural transport?

New solutions to rural transport Net Zero challenges	• How can rural mobility be more equal for residents and visitors?	• What new solutions have been developed for rural transport Net Zero challenges? • What elements of the pilot were most successful in delivering carbon reduction?
New solutions to making rural transport more equitable	• How has rural mobility been made more equal for residents and visitors?	• What new solutions have been developed to make rural transport affordable? • How many different types of travel solutions have been developed?
New solutions to make rural transport affordable	• How has rural transport been made more affordable for residents and visitors	• What new solutions have been developed to make rural transport affordable? • How has been the financial cost saving?
New solutions to meeting rural community needs locally	• How has the needs of rural communities been met more locally?	• What new solutions have been developed to meeting rural community needs? • Which community needs have been met and how?
New solutions to making tourism become more sustainable	• How has tourism-related mobility become more sustainable?	• What new solutions have been developed to make tourism become more sustainable?

Similar to the process evaluation, the outcome evaluation will be led by the Pilot Project Manager using qualitative techniques to gather information required to answer the process evaluation questions. Such techniques could include semi structured interviews with key stakeholders or project staff, or facilitated discussion at team meetings, and will be set out in detail within the pilot M&E plans.

Reporting of the process evaluation will be presented in an annual evaluation report prepared by the Pilot Project Manager, or at the end of the pilot, whichever is soonest.

Reporting of the process evaluation will follow a similar flow to the stage 1 monitoring, as shown in the table above.

Roles and Responsibilities

Each pilot will have an appointed Pilot Project Manager who will be responsible for developing the individual M&E for their pilot project. The Pilot Project Manager will be appointed by the Pilot Project lead organisation. The Pilot Project Manager will prepare the quarterly and annual monitoring reports and be the point of contact with partners (such as operators, community groups, parish council) and stakeholders (such as industry bodies) in preparing these reports.

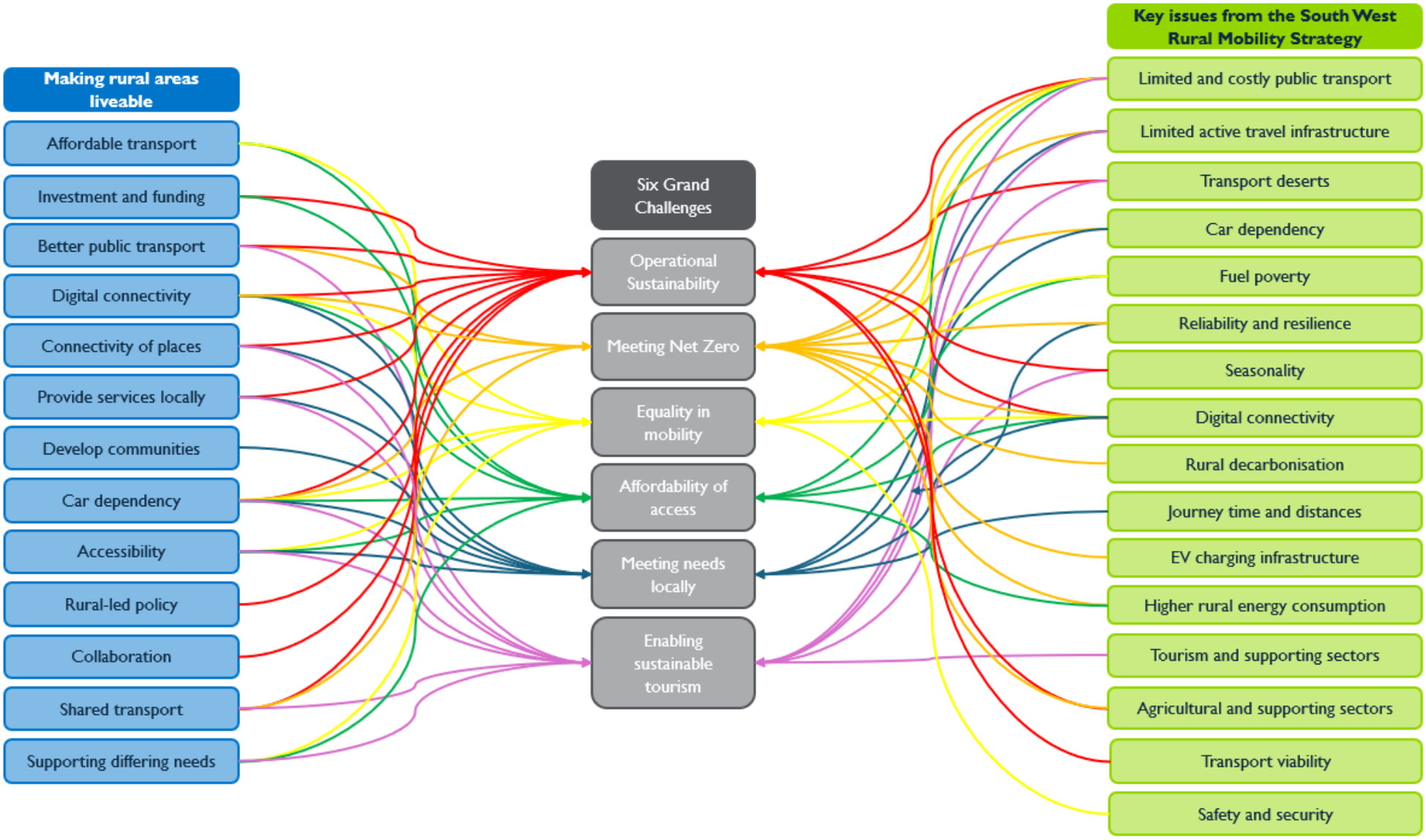
Dissemination of Findings

A key objective of the pilots is to ensure lessons learned from delivering the pilots are disseminated, both in terms of what made pilots a success but also where pilots have failed and why, to ensure mistakes are avoided in future. This knowledge sharing should happen both within the pilot programme, so that other pilots can benefit from these learnings, and across other programmes and teams within the STB. Findings should also be disseminated more widely with other organisations in the South West so these lessons can have the most impact for rural mobility.

Whilst the M&E establishes the framework for which the pilots are evaluated and lessons learned gathered, the STBs will need to develop a plan to disseminate these lessons. Such activities in the plan could include reporting, writing articles or blogs, attending events and conference presentations.

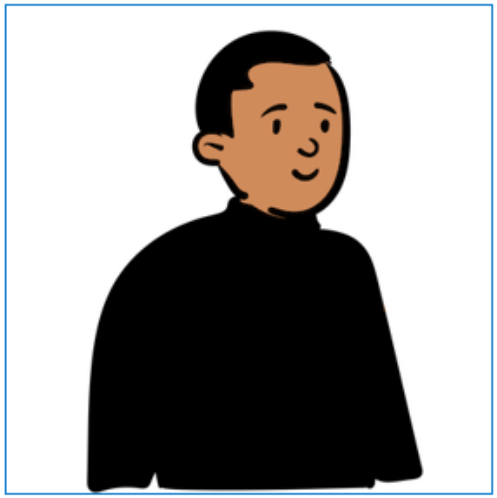
To increase the value of the learning from the pilots, the dissemination of findings and lessons learned should not be left until the end of projects or the programme but should be ongoing throughout the projects and undertaken as new findings come to light.

Appendix A – Links Between Grand Challenges and Rural Issues


Making rural areas liveable
Affordable transport
Investment and funding
Better public transport
Digital connectivity
Connectivity of places
Provide services locally
Develop communities
Car dependency
Accessibility
Rural-led policy
Collaboration
Shared transport
Supporting differing needs
Six Grand Challenges
Operational Sustainability
Meeting Net Zero
Equality in mobility
Affordability of access
Meeting needs locally
Enabling sustainable tourism
Key issues from the South West Rural Mobility Strategy
Limited and costly public transport
Limited active travel infrastructure
Transport deserts
Car dependency
Fuel poverty
Reliability and resilience
Seasonality
Digital connectivity
Rural decarbonisation
Journey time and distances
EV charging infrastructure
Higher rural energy consumption
Tourism and supporting sectors
Agricultural and supporting sectors
Transport viability
Safety and security

Appendix B – Persona Development

Edward



In their own words:

"I'm conscious of environmental factors, though won't sacrifice my comfort. I would like to buy an EV as a run around but will only do that when I change my car. Online shopping has been great, and I will continue to shop online as it's helpful."

About Edward

Edward lives in a highly valued detached farmhouse with stables, for the family horse, on the outskirt of a small village in Dartmoor National Park. Edward owns several cars, which is the primary mode of travel for the family, due to being some distance from the nearest public transport network. Edward and his wife Harriet enjoy shopping at the market and nearby farm shops for fresh produce, but often find themselves ordering their weekly meals from pre-planned meal-kit companies such as HelloFresh and Gousto for convenience.

Given the remote locality Edward lives in, he often finds their Wi-Fi strength and mobility phone signal are hit and miss, which causes disruption to both Edwards PC, laptop, and phone when he tries to work from home. It also hinders his regular catch ups with his brother, who is currently living in Australia, and so Edward often switches from FaceTime to landline.

Core Values:
Comfort, convenience, journey time

Purchase Power:
High income

Tech Confidence:
Confident

Concerns/Frustrations:
Lack of EV infrastructure

Mobility Assets:
Two cars (both hybrid)
Motorhome

Subscriptions/Interests:
gousto

Catryn

In their own words:

"I'd love to be more environmental, and try to use public transport when I can, but I'm often forced to use the car through necessity. Some bus and train routes are great, some towns are easy to access, but others are not. I need to visit the big city/town to do shopping and go frequently."

About Catryn

Catryn and her family have recently moved to a small village between Bristol and Bath, moving south of the city to seek a rural country lifestyle. The new location means her two daughters rely more on her for transport to school and to see friends. Catryn will often drives her daughter to the nearest secondary school, which is 5 miles away in the nearest town, before commuting to the business park on the outskirts of the town. This is convenient as allows her to drop off and pick up her daughter from school every day. Catryn's husband primarily works from home, but occasionally travels into Bristol for client meetings, requiring a long drive due to the lack of reliable public transport facilities in the area.

Catryn and her family spend the weekends in the outdoors, walking their dogs and enjoying the local countryside. Shopping is split between online shopping and travelling by car to the closest supermarket, but her and her daughters will always make the trip into Bath in the winter for the Christmas Markets.

Core Values:
Journey time, accessibility, environment

Purchase Power:
Good income

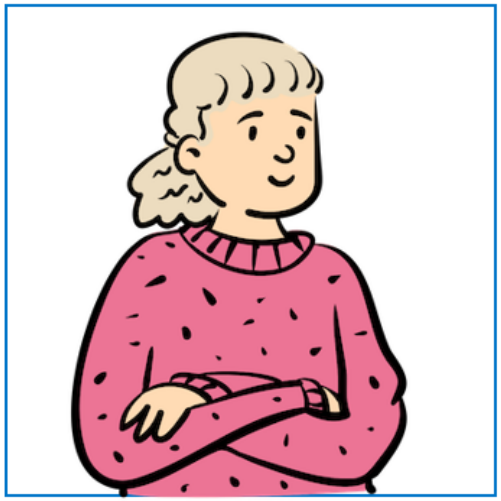
Tech Confidence:
Confident

Concerns/Frustrations:
Public Transport

Mobility Assets:
Two cars
Bicycles for each family member

Subscriptions/Interests:

Dianne



In their own words:

"It can be frustrating, and costly, to go to hospital for appointments, but that's life. I'm sad that some areas, despite being close, are off limits due to the vagaries of public transport. There's an informal car club on the horizon, but it's not something I am confident about using."

About Dianne

Dianne lives with her partner and three dogs in a detached home in a calm, quiet village surrounded by agricultural landscape. Dianne and her partner both work part time from home as well as running their small online candle business from so rely on efficient broadband and Wi-Fi to support both of their computers and/or laptops. When they do need to travel, Dianne and her partner use public transport as much as they can for longer journeys, even if they use the car for first mile journeys from their home to a bus/train station. However, for weekly shops and to access key services they use their old car as it is easier and sometimes more reliable for shorter journeys.

Despite working and running a business from her home, Dianne does not use the internet for personal use often and largely communicates through post or landline.
Dianne does have Facebook which she uses to keep in touch with her friends from school but that is the extent of her internet and social media use. Dianne recycles and reuses as much as she can, rarely buying new clothes or items for her home unless necessary and her house is powered by oil central heating.

Core Values:
Affordability, access to key services environment

Purchase Power:
Low income

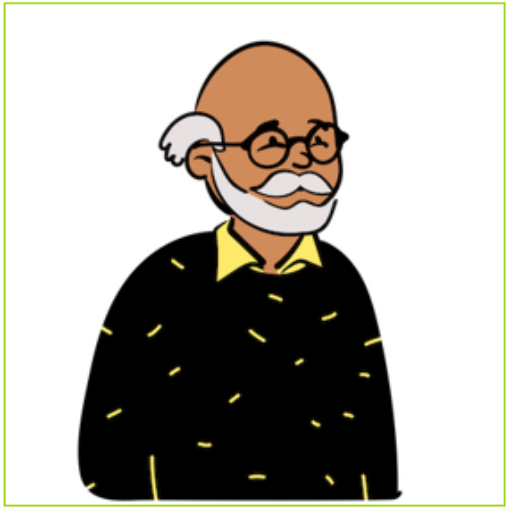
Tech Confidence:
Low confidence

Concerns/Frustrations:
Public Transport
Cost of travel

Mobility Assets:
One car

Subscriptions/Interests:

Ron



In their own words:

"I don't really get out too much because I can't. I need my family and friends help with shopping and driving to appointments. I can walk into village for essentials, but that is about it, and lots of shops have now gone. If I want to go further, need to plan them well in advance. I make my choices based on relationships and time with friends as much as anything else."

About Ron

Ron is a retired nurse who lives with his wife Anne in a large rural village, where the population is mainly retired couples. The couple recently moved across the village into a bungalow following Anne's hip operation last month and so Ron increasingly finds himself caring for her.

Ron himself is quite active and enjoys long walks with his Labrador around the local footpaths and strolling to the village pub for quiz night with his friends. Anne used to join him on his walks, but the footpaths are uneven, and she doesn't want to risk a fall so soon after her operation.

They have all the basic amenities within the village but as the couple do not own a car, they rely heavily on family and friends to access more key services such as supermarkets and hospitals and feel fortunate they are not isolated from them. Ron enjoys using his bus pass for more leisurely days out but finds the timetable at the stop is out of date so often waits longer than anticipated for the next services. Neither Anne nor Ron own an up-to-date smartphone to access real time information.

Core Values:
Affordability, accessibility

Purchase Power:
Low income

Tech Confidence:
Low confidence

Concerns/Frustrations:
Anne's accessibility
Relying on others

Mobility Assets:
Bus pass

Subscriptions/Interests:

Helen

In their own words:

"I enjoy using public transport, but when urgent travel is needed, I'll drive. I have good links to the major centres nearby by good bus services and further afield a train line helps. I try to cycle as often as possible, and would like to do more, but safety is a key problem on country roads."

About Helen

Helen lives with her wife Sally in a pleasant, detached home in a coastal town, where she is near transport links. Helen tries to reduce her single car travel. However, when using public transport to commute to work in the city three days a week, the reliability of the services fluctuate. This is more frequent in the winter months, so sometimes has no other choice but to travel to work by car.

Helen and Sally buy their groceries online. Helen is starting to become more environmentally conscious and try to reduce their water use in the home, as well as recycling everything they can. Helen often uses her smartphone for communicating with her friends and family on Facebook and to find the latest online deals.

Helen enjoys cycling around Dartmoor on the spring and summer weekends but does not consider the roads safe to ride in any other conditions and discourages her family and friends from doing so as well.

Core Values:
Affordability, accessibility

Purchase Power:
Low income

Tech Confidence:
Good confidence

Concerns/Frustrations:
Reliability of public transport

Mobility Assets:
Shared private car
Railcard
Bicycle

Subscriptions/Interests:

Shane

In their own words:

"My vehicle is tied to work so in use through the day. It can be expensive to maintain due to wear and tear, particularly on the bumpy country lanes. Travel at weekends is limited with kids due to lack of seating in the van. I rely on nearby amenities and support from family and friends. Parking at home has become an issue at home due to every house on the road getting multiple vehicles."

About Shane

Shane rents a terraced home in a small village which is a fair distance from the nearest town or city. This distance from these places result in him shopping locally for groceries, which can often be expensive. Shane is one of the few tradesmen in his village so often does odd jobs around the local community to support this income. He is self-employed while his girlfriend works part time as a cleaner and looks after their toddler the other days. Shane does not own a private car and only has his work van, which he relies on to get to and from work, carrying all his tools. Running his van and another car is too expensive.

In his spare time, he does a lot of online gaming, but this can sometimes be disrupted by their internet connection, as they couldn't afford high quality Wi-Fi and broadband connections. He uses his smartphone for contacting clients, family and friends but often loses his signal when out and about meaning that he can miss calls from clients which could lose him business. Additionally, Shane also uses his smartphone for gaming and social media.

Core Values:
Affordability, accessibility

Purchase Power:
Low income

Tech Confidence:
Good confidence

Concerns/Frustrations:
Cost of maintaining vehicle
On street parking
Reliance on family and friends

Mobility Assets:
One van used for work, family and day to day needs

Subscriptions/Interests:

Marjorie

In their own words:

"I'm worried about the disappearance of shops and services over the years. It's currently not a problem, but as things change, it is becoming concerning. I am restricted to times and locations on the bus network which is ok but can be inconvenient. If the route requires multiple buses, I avoid it as the connections can be poor."

About Marjorie

Marjorie lives on her own in a small cluster of bungalows on the outskirts of a small village and cannot drive. Marjorie shops locally at the village, however, bus services are so infrequent she only goes into the nearest town when she knows there will be bus services. As Marjorie doesn't have a smartphone, she will struggle if bus timetables change and go predominantly online. She has been stuck in the village before due to the cancellation of a bus and had to call her daughter to pick her up and take her home, as she had no other option.

If Marjorie does ventures further than her local village, it is either only villages on the main bus route or with her daughter or granddaughter in their cars, but this is not often. Marjorie does have a carer that visits her most days, who has suggested she can use community-based transport if she needs to, who will be happy to help her with her travels. Most of Marjorie's communication is via post or landline.

Core Values:
Accessibility, cost

Purchase Power:
Low income

Tech Confidence:
Low confidence

Concerns/Frustrations:
Public transport connections
Relying on other people

Mobility Assets:
Bus pass

Subscriptions/Interests:

Terry

In their own words:

I'm grateful that I can still drive as this saves money and time. It doesn't bear thinking about what might happen if I lose the ability to drive. This will seriously hamper my life. I need to consider moving somewhere where I do not need to rely on a vehicle, but this is where I've always lived and moving is expensive"

About Terry

Terry is a widower living on his own in the house he and his wife bought. The house is in the coastal village Terry grew up in and though he has a couple of friends close by, his children moved away for education. They have not returned, though only live an hour away in a larger rural town. Following the passing of his wife, Terry is beginning to feel lonely and isolated from his family but is grateful he can still drive to visit his children and grandchildren.

Terry's eyesight is getting worse, and he is hoping that it doesn't prevent him from driving, as this allows his to have his freedom, see his family and access the key services he needs. Without his car he would feel stuck. The local shops are too expensive for Terry to do his shops and the village gets busy in the spring and summer months so he tries to avoid the tourist buzz where he can. His family have tried to introduce technology into his home so he can do online grocery shops and facetime them when he is feeling lonely, but Terry does not like new technology and still largely communicates by traditional post or the landline. Terry does have an old iPhone, which he pays for on credit, but he doesn't know how to operate most apps on it.

Core Values:
Affordability, accessibility, quiet

Purchase Power:
Low income

Tech Confidence:
Low confidence

Concerns/Frustrations:
Isolation and loneliness

Mobility Assets:
One car and a bus pass he doesn't regularly use

Subscriptions/Interests:

Angus

In their own words:

"The choice of different modes of transport is taken away as there is no other choice apart from a car. Public transport isn't viable for me and when I need to sporadically visit my properties, public transport won't be able to facilitate those journeys. When I do have planned visits, I always leave earlier in peak tourist season".

About Angus

Angus is a domestic landlord living on a farm in deep rural Devon, resulting in long travel times to his properties. Angus often travels by car as public transport is not viable for his journeys and though he'd like to be more environmentally friendly, he feels that electric vehicles are not yet accessible for those in his deeper rural communities due to cost and available infrastructure.

His banking and mortgage are still done over the phone or by post, but the post sometimes takes a while to reach him, so phone is his preferred choice of communication. Angus does own a smartphone and often uses this for his communications with friends, colleagues and family but is often late adopting new technologies. He also uses it for online shopping due to being so far away from large supermarkets and shops.

Due to his remoteness, Angus has very poor broadband access. Angus does own an old jeep, he also owns a boat, which is kept at the nearest harbour and is used regularly throughout the summer.

Core Values:
Affordability, accessibility

Purchase Power:
Low income

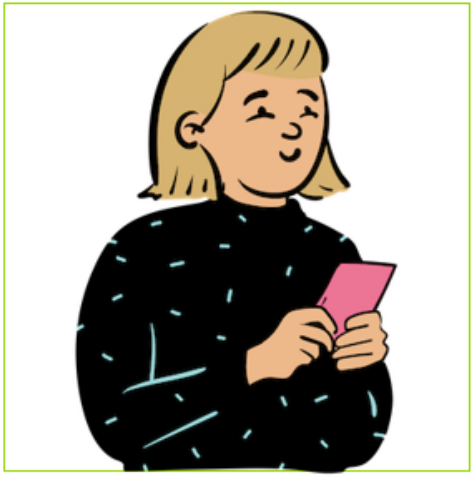
Tech Confidence:
Late adopter

Concerns/Frustrations:
Poor broadband
Always having to adopt to new technologies

Mobility Assets:
One car and one boat

Subscriptions/Interests:

Ellie



In their own words:

"The time I leave for work is key as it impacts how the commute will turn out and if I'm late to work it adds pressure on the other teaching staff. Though as education finishes earlier, I can luckily miss the rush hour traffic.

About Ellie

Ellie has just bought her first home with her partner on a private housing estate on the outskirts of a small rural town. She has two children aged 2 and 6. Her partner works from home three days a week, relying on their Wi-Fi and broadband for virtual connectivity. Ellie is a teacher and commutes to work by car as bus services have not been extended to her new development yet. Fortunately, Ellie and her partner both work in the same town, as having one car can sometimes restrict them from have more independence and if Ellie wants to pop out with her youngest while her partner is also out, she is restricted to walking around the development.

Ellie often sells her old clothes on Vinted for extra income and has also tried to start a baking business as side hustle to increase her income, though struggles to find the time between a full-time job and being a mother. Ellie is a frequent user of all social media and regularly facetimes her friends and family on her iPhone. Her mobile phone is her main communication method.

Core Values:
Affordability, accessibility with children

Purchase Power:
Low income

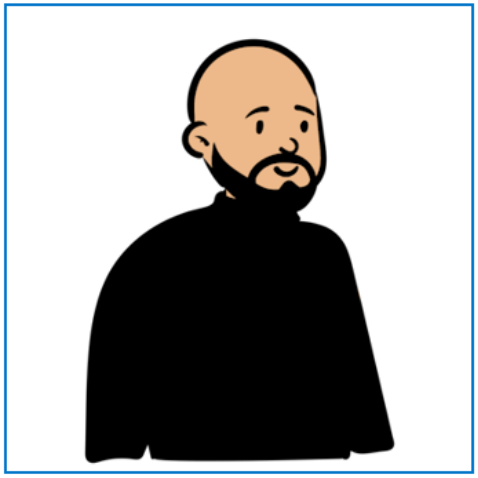
Tech Confidence:
Confident

Concerns/Frustrations:
Cost of maintaining a car
No bus services available

Mobility Assets:
One car

Subscriptions/Interests:

Howard



In their own words:

"I'd like to be able to transition to usings EVs but I don't feel like there is enough infrastructure around me to be able to use them."

About Howard

Howard is a hard-working family man living in a large rural detached home with his wife. Howard is close to retirement so has reduced his working days to Monday – Thursday with a hybrid working pattern, commuting into the nearest city for work twice a week. He usually drives to the nearest train station 5 miles away before getting a 30-minute train into the city. Howard enjoys getting the train as it means he can start to check his emails and plan his day or catch up on his latest BBC drama on his journey back.

Howard's daughter is in her final year of University, and he has been financially supporting her since she began her degree. Howard and his wife usually travel to visit their daughter once every 2 months, usually driving and staying in a hotel nearby.

Howard does nearly all his shopping and banking online due to convenience but enjoys eating out on the weekends. Howard does most of his communication via email or phone, owning both a work and personal phone. During weekends, Howard enjoys playing golf with his friends at the nearest Golf and Spa Hotel, as well as date nights with his wife and working on little projects around the house.

Core Values:
Convenience, comfort

Purchase Power:
Very high income

Tech Confidence:
Very confident

Concerns/Frustrations:
Train Strikes / Delays

Mobility Assets:
Three cars (his, his wife's and his daughters which sits on the drive when she is at university).

Subscriptions/Interests:

Jaz

In their own words:

"I have to get an uber or ask a friend for a lift if the bus doesn't show up or risk missing my classes. Due to living further away from university in a rural area I feel excluded from social activities, and it has impacted my opportunities due to commuting times, prices and available public transport"

About Jaz

Jaz is a student at Truro University. Jaz always aspired to move to Plymouth or Bristol for university but has remained in her small village to help care for her disabled father. As well as studying in Truro, Jaz works part time as a hotel cleaner to help support the family. She often finds she works late shifts and must wait a while for the bus in the evenings. Whilst this is usually no issue in the summer, during the autumn and winter months she dreads the wait. It's an old bus stop with flickering lights and a lack of real time information so she relies on her 4G connection for regular updates on the bus.

Jaz rarely finds time to socialise with her friends between university, work and home life, but when she can, she often has to leave early due to public transport availability. When she does have time, Jaz likes to head to the coast to paddle board and walk around in the peaceful fresh air, though this can be slightly less peaceful during peak tourist season.

Jaz will generally pick up any groceries needed from the town before or after her shift, using her rucksack to carry them home.

Core Values:
Affordability, accessibility, safety

Purchase Power:
Low income

Tech Confidence:
Good confidence

Concerns/Frustrations:
Bus stop infrastructure
Peak tourist season

Mobility Assets:
No car
Relies on public transport

Subscriptions/Interests:

Organisation Personas

Dairy Farmer

Description
Traditional Dairy Farmer in Devon

Sector
A – Agriculture, forestry and fishing

Context
This organisation requires the workforce to come to the farm, which is generally fine as the farm is located on the outskirts of a rural village and is not subject to heavy traffic. However, given the farms location, public transport is not a viable option which can hinder staff who are on minimum wage and cannot afford to run a private vehicle. The workforce have arranged an informal car sharing scheme, but this can be difficult with some workforce living further away than others.

Travel Generated
- Employee travel
- Personal
- Freight

Pain Points
- Workforce rely on private vehicles to access site
- No remote working capability
- Lower digital skills
- Requires urgent movement of perishable goods to markets and depots.

Biotech Manufacturer

Description
Manufacturer of healthcare instruments

Sector
C - Manufacturing

Context
This biotech manufacturer is located on a rural science park and generally requires their workforce to be in the office 5 days a week. Given the science park is 45 minutes from the nearest rural centre, all employees usually drive to work. In addition to the commuting issues, the manufacturer requires highly educated and skilful employees and so the lifestyle in the region may not be suited to young graduates or early career professionals.

Travel Generated
- Employee travel
- Freight

Pain Points
- Workforce rely on private vehicles to access site, hindering recruitment opportunities
- No remote working capability
- Supply chain reliant on efficient delivery

Organisation Personas

B&B

Description
Small B&B in a Rural Town

Sector
I – Accommodation and Food Service Activities

Context
A B&B located in a small rural town on the outskirts of Dartmoor. The B&B is seeing fewer people visit, even during the peak tourist season, as it becomes harder to access local beauty spots. Fewer rail services operate in the town and whilst the bus services are good to reach larger hubs in the area. Whilst guests do bring bikes, the active travel infrastructure is poor and local rural roads are unfamiliar to tourists and can often feel more daunting to cycle on.

Travel Generated
- Employee travel
- Tourist Travel
- Freight delivering goods to the business

Pain Points
- Poor connections to other rural areas
- Declining local services has impacted visitor numbers

Electrician

Description
Family Electrical Business

Sector
F – Construction

Context
This family electrical business offers services over a wide section of the region, visiting many households and businesses. Travel is normally made in work vans, and they try to share as many journeys as possible to reduce travel costs. However, the vans can be quite large which makes manoeuvring around small villages and lanes precarious. The business uses WhatsApp to accurately inform each other of any issues.

Travel Generated
- Employee travel
- Site visits

Pain Points
- Vehicles are not suitable for the local lanes
- No remote working capability
- Digital skills are lower
- Large amount of equipment limits vehicle size

Organisation Personas

Local Souvenir Shop

Description
Local souvenir shop in tourist attracting town

Sector
G – Wholesale and Retail

Context
This little souvenir shop is located at the heart of a coastal town, consisting of a team of three who all travel in from surrounding villages. The team used to live in the town, but increased prices resulting from it being popular for second homes has drove them out. The commute is difficult for the team in the summer months due to tourist congestion. Public transport is not an options as the town lacks a train station and the irregular bus services do not coincide with the shift patterns.

Travel Generated
- Employee travel
- Tourist travel

Pain Points
- Short commutes can be longer during peak tourism months
- Lack of alternatives to private car

Care Workers

Description
Healthcare Workers

Sector
Q – Human Health and Social Work Activities

Context
These carers visit the sick and vulnerable across the region, requiring being on the road quite a lot but the low pay means that employees often driver older, more polluting vehicles. The employees dread "changeover day" on a Saturday when holiday makers finish their holidays and new ones start theirs. This makes journeys considerably longer.

Travel Generated
- Patient visits

Pain Points
- Sporadic congestion can cause workforce long delays in seeing vulnerable people
- Alternative to driving can impact cost and time
- Those driving are generally in polluting vehicles
- Lower digital skills

Organisation Personas

Tech Start-Up

Description
Tech start-up based in a shared workspace office in an innovation park

Sector
J – Information and Communication

Context
This small tech start-up company is based in a shared workspace in an innovation park on the outskirts of a large rural town. Those trying to work from home suffer with poor digital connectivity and therefore need to work from the office, resulting in flexible working being limited to most, impacting their general wellbeing. This could impact the company as employees may want to search elsewhere for more flexible working patterns.

Travel Generated
- Employee travel

Pain Points
- Digital connectivity in rural areas
- Few amenities near the office
- Employees need to drive to access work

Local Theatre Group

Description
Local theatre

Sector
R - Arts, Entertainment and Recreation

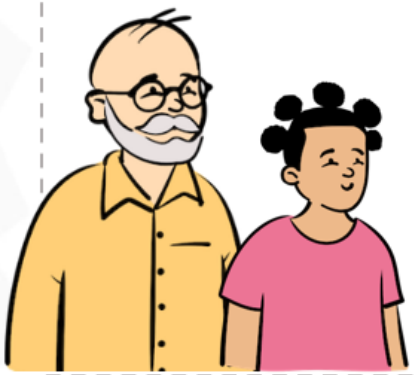
Context
This local theatre group draws young people and staff during the evening periods, often when the bus services become infrequent. The younger members of the group cannot afford to travel by train, particularly those still in school. Younger members of the group are often driven by parents, resulting in a high volume of cars in the area during the group operating hours. Whilst those who live locally can walk or cycle, though this is unappealing during the darker evenings during the autumn / winter months, particularly for the female members of the group.

Travel Generated
- Employee / member travel
- Patrons

Pain Points
- Expensive or infrequent public transport options
- Volume of vehicles upsets locals, particularly those coming home from work in the evenings
- Safety concerns for those walking / cycling in the evenings

Tourism Personas

Coach Trippers



Description
Coach trips of older retired people and school trips travelling to key tourist locations. Either day trips or shorter overnight stays in the area.

Trips Taken
Staying for a limited number of hours at each destinate and potentially staying at local hotels.

Interests:

Sightseeing | Shopping | History & Culture | Entertainment

Attributes

- Travelling in groups
- Usually travel by coach or minibus
- Travel to multiple locations in one day
- Day trips / staying for a week

Family Day Trips

Description
Day trips to major tourist attractions for families with children from outside of the area. Predominately car-based travel but some public transport to those locations well-served by bus and train.

Trips Taken:
Day trips with no overnight stay

Interests:

Sightseeing | History & Culture | Seaside

Attributes

- Travelling with young children
- Usually travel by private car
- Sometimes get stuck in traffic going into tourist destinations
- Enjoy walking and cycling along seaside front, in national park etc.
- Weekends / School Holidays

Tourism Personas

Local leisure

Description
Residents undertaking leisure activities in their local area.

Trips Taken
Short trips out of a few hours, at most, with a variation in modes of travel

Interests

Shopping Eating Out Entertainment

Attributes

- Travelling with children
- Travel by car / van
- Travel to multiple locations in one day
- Weekends / School Holidays

Luxury Break

Description
Couples staying in high end hotels and holiday cottages.

Trips Taken:
Long weekends or weeks. Car-based travel to and around the area.

Interests

Dining Out History & Culture

Attributes

- Travel by car or first-class public transport
- Weekend travel
- Any time of year travel
- Use car to travel to various attractions in the park throughout their stay

Tourism Personas

Event Spectators

Description
Day or weekend trips as a spectator, usually in groups, to see major sporting or cultural events including outdoor races, music, festivals, etc.

Trips Taken
Trips, both local and outside of the area, to permanent and temporary event locations.

Interests
Sport Entertainment Festivals

Attributes
- Travelling in groups
- Travel by cars, coaches or minibus depending on event
- Weekends / weeks usually during the summer
- May travel on a daily basis depending on event, this will likely be by minibus /coach

Outdoor Adventurers

Description
Individuals or groups touring by bike or on foot – arriving by public transport and walking or cycling through the area. Stay at hostels, campsites or wild camp.

Trips Taken:
Trips to sites which offer outdoor activities such as mountain climbing, canoeing, hiking and sailing.

Interests
Hiking Camping Surfing

Attributes
- Travel as couples or groups
- Usually travel by mini-bus but some use public transport if available
- Sometimes get stuck in traffic going into tourist destinations
- Days and weekends

Tourism Personas

Event Participants

Description
People taking part in events arriving individually, in groups of participants and/or with supporters and families (e.g. triathlon, Ironman, etc).

Trips Taken
Mixture of day trips and overnight stays depending on timing and length of the event

Interests

Sport

Attributes

- Travelling in groups
- Travel by cars, coaches or minibus depending on event
- Weekends / weeks usually during the summer
- May travel daily depending on event, this will likely be by minibus /coach

Family Beach Holiday

Description
Families taking one or two-week traditional seaside holidays staying in campsites or self-catering accommodation.

Trips Taken:
Visiting major tourist attractions, coastal towns and days at the beach.

Interests

Seaside

Camping

Attributes

- Travelling with children
- Travel by car / van
- Sometime get stuck in traffic going into tourist destinations
- Weekends / School Holidays

Tourism Personas

Volunteers

Description
Groups of volunteers or individuals staying in the area during a short time to undertake a volunteer / working holiday

Trips Taken
Similar trips taken each day to a rural area for wildlife and conservation activities.

Interests
Outdoors
History & Culture
Conservation and Wildlife

Attributes
- Either travel individually or in groups
- Travel by cars, coaches or minibus
- Weekends / weeks usually during the spring or summer
- Travel daily

Young Couples

Description
Young couples' glamping or staying in an Air B&B for a mini break with their dog to enjoy some scenic activities and explore new places.

Trips Taken:
Long weekends or weeks. Car-based travel to and around the area.

Interests
Pub
Dog Walking
Outdoors

Attributes
- Travel as couples, sometimes with pets
- Usually travel by private car but some use public transport if it is cheaper
- Sometime get stuck in traffic going into tourist destinations
- Weeks / Weekends

Appendix C – Theory of Change

Background	Inputs	Outputs	Outcomes (change)	Impacts
• South West Rural Mobility Strategy. • The Liveable Rural Communities concept. • Rural grand challenges: ○ How can rural transport be made more operationally sustainable (including funding) in the long term? ○ How can the net-zero challenge be met in rural areas? ○ How can rural mobility be more equal for residents and visitors? ○ How can rural transport be made more affordable for residents and visitors?	The South West Rural Mobility Pilots will facilitate / enable the following: • The securing of funding and resources for rural mobility pilots from a range of sources including public, private and third sector. Funding will need to be a combination of capital and revenue, depending on the specific bundle of interventions. • The development of appropriate governance structure and	• Pilot management and structures. ○ New management, structures and processes that enable pilot deployment of rural mobility. ○ New management, structures and processes that enable sustainable delivery of rural mobility beyond pilots. ○ Pilot partnerships. ○ Development of partnerships to secure and distribute funding. ○ Development of partnerships to develop, manage and operate pilots. ○ Development of longer-term partnerships to apply	• Successful pilots with new solutions adopted widely with influence beyond South West. • Unsuccessful pilots with learning and evidence shared widely. • New partnerships across rural mobility in the South West. • Improved expertise, skills and capabilities in rural mobility. • Increased community engagement in rural mobility. • New operationally sustainable delivery models for rural transport. • New solutions to rural transport Net Zero challenges.	• Improved performance of rural areas in delivering Net Zero for transport. • Improved access to employment and employees. • Improved access to education, health & social care, retail and services. • Improved access leisure and social interaction. • Improved access and connectivity for tourism. • Improved access and connectivity for agriculture, food production and security.

○ How can the needs of rural communities be met more locally? ○ How can tourism-related mobility become more sustainable? • Major environmental, social and economic benefits of rural including: ○ Combating climate change and supporting climate adaption and resilience. ○ Producing and distributing renewable energy. ○ Supporting physical and digital connectivity (including between urban areas). ○ Supporting nature and environmental net gain ○ Food production and security. ○ Providing the 'great outdoors' for tourism, leisure and wellbeing. ○ Supporting history and heritage.	process to support the robust development, management and operation of pilots. • Bringing together of stakeholders across sectors to collaborate and deliver the pilots. • Bring together cross-sectoral expertise and capabilities to support the delivery of the pilots. • Develop a consistent and robust monitoring and evaluation framework for rural pilots in the South West.	learning across the rural South West and beyond. • Ways of working: the following ways of working will be adopted within pilot and across the programme: ○ A co-operative approach at a programme level, between pilots and within individual pilots. ○ A robust, standard and transparent approach to risk management across the pilots, accepting appetite to risk may vary across pilots and that risks may need to be shared across partners. ○ 'Fail fast', learn and apply thinking rapidly.	• New solutions to travel for those without access to a car. • New solutions to make rural transport affordable. • New solutions to meeting rural community needs locally.	• Improved access and connectivity for wider rural economic sectors. • Improved reliability and resilience of rural mobility and communities. • Improved access and connectivity supporting rural's wider role in Net Zero and climate resilience. • Improved access and connectivity supporting rural's wider role in nature.

○ Providing land and economic resources. ○ Supporting wider economic sectors. ○ Supporting rural communities, their wellbeing, quality of life and local identity. • South West Rural Mobility Pilot programme Vision: ○ Delivering liveable rural communities through the effective use of piloting in South West England. • South West Rural Mobility pilot programme objectives: ○ Deliver a varied programme of pilot projects which consider the six grand challenges, different geographies, different combinations of solutions and different partnerships.	• Use marketing and communications to disseminate learning through papers, articles, press releases, social media and events. • Contribute to wider work across the country to develop new solutions to rural mobility that are sustainable in the long term.	○ An open approach to generating and sharing learning within pilots, across the programme and beyond. ○ A standard approach to reporting on pilots both periodically and at the end of pilots. • Bundles of interventions delivered: ○ Different bundles will be delivered across pilots unless different use cases are applicable. ○ Bundles may be a combination of services and infrastructure. ○ Bundles will be delivered with permanency in mind. ○ Bundles may include the application of new		

○ Deliver a programme of pilots which develop and test commercially, financially and operationally sustainable models for the delivery of mobility for rural areas. ○ Engage communities and stakeholders in developing and running pilot projects and delivering the right solutions for local areas. ○ Provide best practice for the delivery of rural mobility, in collaboration with the public, private and third sectors. ○ Undertake robust monitoring and evaluation of the pilot projects, understanding what impacts and benefits have been generated and why, and disseminate findings widely. ○ In developing pilot propositions, we expect pilot leads and partners to		technologies but may also include existing technologies within new use cases. ○ Consideration of how bundles can be scaled and applied to different uses cases. • Operational and business models ○ Development of new models for deployment of individual and/or bundles of interventions in pilots. ○ Development of new models for longer term deployment of individual and/or bundles of interventions beyond trials. • New learning		

form their own visions and supporting objectives based on those for the programme as a whole. • Pilot scope, including: ○ Liveable Rural Communities ○ Grand challenges ○ Customers and activities ○ Geography ○ Interventions ○ Approach to specification ○ Rural mobility framework ○ Administrative boundaries ○ Modes ○ Delivery leads ○ Partnering ○ Timescale ○ Funding ○ Monitoring and evaluation • DfT Future of Rural Transport Key Principles, including: ○ New modes of transport and new mobility services		○ New cross-sectoral learning, skills and expertise in developing and deploying rural mobility solutions ○ Dissemination of learning from pilots to partners, stakeholders, across the South West and around the UK and beyond.		

must be safe and secure by design. ○ Innovation in transport should consider the needs of rural transport users and must be available and accessible to all parts of the UK and all segments of society. ○ Walking, wheeling, cycling and micromobility must be enabled as the best options for short rural journeys. ○ Affordable and accessible public transport and shared mobility must be fundamental to an efficient rural transport system. ○ New transport modes and services in rural areas should support a rapid transition to zero emissions and be adapted to climate change. ○ Innovation should improve road efficiency and reduce congestion by promoting shared mobility, improving				

user choice and consolidating freight. ○ The marketplace for mobility must be open to stimulate innovation and give the best deal to users, working alongside local authorities to complement existing services. ○ New transport services must be designed to operate as part of an integrated system that combines public and private modes with community-led schemes for transport users. ○ Data from new transport services must be shared where appropriate to improve both and the operation of the transport system. • Background to rural mobility pilots in the UK.				

Appendix D – Concept Dashboards

Tourism Aggregator:

Facilitating car free tourism through the aggregation of travel and tourism services.

Customer: Tourist

Young couples' glamping or staying in an Air B&B for a mini break with their dog to enjoy some scenic activities and explore new places. They usually stay for a long weekend or take a week-long trip, predominantly using car-based travel.

Pub | Dog Walking | Outdoors

Funding: Low

Timescale: 12 months

Delivery Model: Private

Output Specification

Grand Challenges

- ✓ How can rural transport be made more operationally sustainable in the long term?
- ✓ How can the Net Zero challenge be met in rural areas?
- X How can rural mobility be more equitable for residents and visitors?
- ✓ How can accessing daily needs be made more affordable for residents and visitors?
- X How can the needs of rural communities be met more locally?
- ✓ How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Within Rural
- Local Tourism Market (incl. national landscape / park)

- Local Retail Services
- Car Club Hire
- E-bike Hire
- Station Transfers
- Tourist Travel Season Tickets on Public Transport
- Discounted Entry at Tourist Attractions for Non-Car Based Tourists

Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- ✓ Improving intra-rural connectivity
- ✓ Delivering Net Zero in rural areas
- ✓ Delivering through cross-sectoral partnerships and funding including with communities

Tourism Links:

Considers how to connect communities and support the travel needs of tourists visiting the South West.

Customer: Tourist

Day trips to major tourist attractions for families with children from outside of the area. Predominately car-based travel but some public transport to those locations well-served by bus and train.

Seaside | History and Culture | Sightseeing

Funding: Moderate

Timescale: 12 months

Delivery Model: Public

Output Specification

Grand Challenges

- ✓ How can rural transport be made more operationally sustainable in the long term?
- ✓ How can the Net Zero challenge be met in rural areas?
- ✓ How can rural mobility be more equitable for residents and visitors?
- ✓ How can accessing daily needs be made more affordable for residents and visitors?
- ✓ How can the needs of rural communities be met more locally?
- ✓ How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Within Rural
- Local Tourism Market (incl. national landscape / park)

- Tourist Shuttle Bus
- Integrated Ticketing
- Bike / E-bike Sharing
- Real Time Passenger Information

Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- ✓ Improving intra-rural connectivity
- ✓ Delivering Net Zero in rural areas
- X Delivering through cross-sectoral partnerships and funding including with communities

Accessibility for All:

Aims to support those with long- or short-term disabilities and those who struggle physically to access their daily needs.

Customer: Those with short/long term disabilities

Following the passing of his wife, Terry is beginning to feel lonely and isolated from his family but is grateful he can still drive to visit his children and grandchildren. Terry's eyesight is getting worse, and he is hoping that it doesn't prevent him from driving, as this supports his freedom, see his family and access the key services he needs.

Funding: Low

Timescale: 12 months

Delivery Model: Community

Output Specification

Grand Challenges

- ✓ How can rural transport be made more operationally sustainable in the long term?
- X How can the Net Zero challenge be met in rural areas?
- ✓ How can rural mobility be more equitable for residents and visitors?
- ✓ How can accessing daily needs be made more affordable for residents and visitors?
- ✓ How can the needs of rural communities be met more locally?
- X How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Within Rural
- Market towns with surrounding villages and hamlets

- Community Volunteer Car / Bus Services
- Community Ride-Sharing
- Community E-Bike Sharing (incl. adapted cycles)
- Community Delivery and Passenger Services

Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- ✓ Improving intra-rural connectivity
- X Delivering Net Zero in rural areas
- ✓ Delivering through cross-sectoral partnerships and funding including with communities

Rural Traveller Safety:

Aims to improve traveller safety for all users of the rural mobility network in the South West.

Customer: Vulnerable Groups

As well as studying in Truro, Jaz works part time as a hotel cleaner to help support the family. She often finds she works late shifts and must wait a while for the bus in the evenings. Whilst this is usually no issue in the summer, during the autumn and winter months she dreads the wait. It's an old bus stop with flickering lights and a lack of real time information so she relies on her 4G connection for regular updates on the bus.

Funding: Moderate

Timescale: 12 months

Delivery Model: Public

Outcome Specification

Grand Challenges

- ✓ How can rural transport be made more operationally sustainable in the long term?
- X How can the Net Zero challenge be met in rural areas?
- ✓ How can rural mobility be more equitable for residents and visitors?
- X How can accessing daily needs be made more affordable for residents and visitors?
- ✓ How can the needs of rural communities be met more locally?
- X How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Within Rural
- Market towns with surrounding villages and hamlets

- Real Time Passenger Information
- Wi-Fi Hotspots
- Improved Public Transport Infrastructure
- Secure Cycle Storage
- Contact Customer Help Desk
- Extended Core Network Hours for Local Buses

Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- ✓ Improving intra-rural connectivity
- X Delivering Net Zero in rural areas
- X Delivering through cross-sectoral partnerships and funding including with communities

Community-led Decarbonisation:

Interventions that could be run by the community to support journeys to key services.

Customer: Everyone

Dianne lives with her partner and three dogs in a detached home in a calm, quiet village. She uses public transport as much as they can for longer journeys, even if they use the car for first mile journeys from their home to a bus/train station. However, for weekly shops and to access key services they use their old car as it is easier and sometimes more reliable for shorter journeys. She is aware of a new car club but needs the confidence to use it.

Funding: Moderate

Timescale: 12 months

Delivery Model: Community

Output Specification

Grand Challenges

- ✓ How can rural transport be made more operationally sustainable in the long term?
- ✓ How can the Net Zero challenge be met in rural areas?
- ✓ How can rural mobility be more equitable for residents and visitors?
- ✓ How can accessing daily needs be made more affordable for residents and visitors?
- ✓ How can the needs of rural communities be met more locally?
- X How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Within Rural
- Rural village with neighbouring hamlets

Community E-Bike Sharing

Peer to Peer EV Charging

Community EV Car Club

Community E-van Deliveries

Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- ✓ Improving intra-rural connectivity
- ✓ Delivering Net Zero in rural areas
- ✓ Delivering through cross-sectoral partnerships and funding including with communities

Rural Active Travel:

Aims to encourage the uptake of active travel by providing the services and infrastructure to support intra-community journeys made by cycles.

Customer: Everyone

Helen lives with her wife Sally in a pleasant, detached home in a coastal town, where she is near transport links and tries to reduce her single occupancy car travel. Helen enjoys cycling around Dartmoor on the spring and summer weekends but does not consider the roads safe to ride in any other conditions and discourages her family and friends from doing so as well.

Funding: Moderate

Timescale: 12 months

Delivery Model: Public / Private

Output Specification

Grand Challenges

- ✓ How can rural transport be made more operationally sustainable in the long term?
- ✓ How can the Net Zero challenge be met in rural areas?
- ✓ How can rural mobility be more equitable for residents and visitors?
- ✓ How can accessing daily needs be made more affordable for residents and visitors?
- ✓ How can the needs of rural communities be met more locally?
- ✓ How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Across rural authority boundaries
- Across rural boundaries including remote areas

E-Bike / E-Cargo Bike Sharing

Cycles on Public Transport

Quiet Lanes Network

Wayfinding

Rural Hubs

Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- ✓ Improving intra-rural connectivity
- ✓ Delivering Net Zero in rural areas
- ✓ Delivering through cross-sectoral partnerships and funding including with communities

Rural MaaS:

Aims to build upon the experience of existing MaaS trials to support and enhance rural and coastal mobility networks.

Customer: Everyone

Ellie is a teacher and commutes to work by car as bus services have not been extended to her new development yet. Fortunately, Ellie and her partner both work in the same town, as having one car can sometimes restrict them from have more independence and if Ellie wants to pop out with her youngest while her partner is also out, she is restricted to walking around the development.

Funding: High

Timescale: 2 Years

Delivery Model: Public

Outcome Specification

Grand Challenges

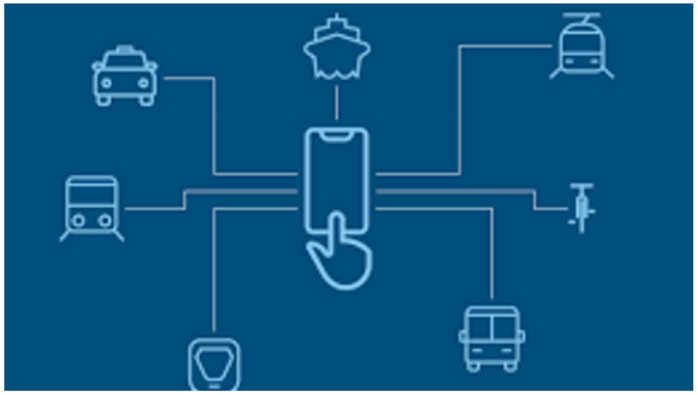
- ✓ How can rural transport be made more operationally sustainable in the long term?
- ✓ How can the Net Zero challenge be met in rural areas?
- ✓ How can rural mobility be more equitable for residents and visitors?
- ✓ How can accessing daily needs be made more affordable for residents and visitors?
- ✓ How can the needs of rural communities be met more locally?
- ✓ How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Within Rural
- Rural counties

Rural MaaS

Rural Mobility Credits



Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- ✓ Improving intra-rural connectivity
- ✓ Delivering Net Zero in rural areas
- ✓ Delivering through cross-sectoral partnerships and funding including with communities

Dynamic Demand Responsive Transport (DDRT):

Rural mobility interventions trialled across rural and urban boundaries to support everyone in rural communities surrounding urban centres and help to "plug the gaps' in public transport networks.

Customer: Everyone

Edward lives in a highly valued detached farmhouse on the outskirt of a small village. He owns several cars, which is the primary mode of travel for the family, due to being some distance from the nearest public transport network. Given the remote locality Edward often finds their Wi-Fi strength and mobility phone signal are hit and miss, which causes disruption when he tries to work from home.

Funding: High

Timescale: 2 Years

Delivery Model: Public

Output Specification

Grand Challenges

- ✓ How can rural transport be made more operationally sustainable in the long term?
- ✓ How can the Net Zero challenge be met in rural areas?
- ✓ How can rural mobility be more equitable for residents and visitors?
- ✓ How can accessing daily needs be made more affordable for residents and visitors?
- ✓ How can the needs of rural communities be met more locally?
- ✓ How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Across rural authority boundaries
- Urban settlements with surrounding rural catchment areas

DDRT

Mobility Hubs

Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- ✓ Improving intra-rural connectivity
- ✓ Delivering Net Zero in rural areas
- ✓ Delivering through cross-sectoral partnerships and funding including with communities

Rural Freight:

The development of new solutions for freight and deliveries in rural areas alongside considering opportunities to merge them with passenger services.

Customer: Everyone

Angus lives in deep rural Devon and though he suffers with poor broadband access, he shops online due to his distance from large supermarkets. Angus often travels by car as public transport is not viable for his journeys. When he travels to key services, he usually combines multiple trips into one, collecting parcels, shopping and running general errands, though he struggles to find time in between his job.

Funding: Medium

Timescale: 12 Months

Delivery Model: Public

Output Specification

Grand Challenges

- ✓ How can rural transport be made more operationally sustainable in the long term?
- ✓ How can the Net Zero challenge be met in rural areas?
- X How can rural mobility be more equitable for residents and visitors?
- ✓ How can accessing daily needs be made more affordable for residents and visitors?
- ✓ How can the needs of rural communities be met more locally?
- X How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Across rural authority boundaries
- Rural counties

- Rural Delivery Consolidation
- Community Delivery Services
- Shared Freight and Passenger Services
- Drone Deliveries in Remote Area

Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- X Improving intra-rural connectivity
- ✓ Delivering Net Zero in rural areas
- ✓ Delivering through cross-sectoral partnerships and funding including with communities

Alternative Services Model:

Reducing the number and length of journeys by providing more services directly into rural areas, including through community and public sector provision.

Customer: Everyone

Ron is a retired nurse who lives with his wife Anne in a large rural village. The couple recently moved across the village into a bungalow following Anne's hip operation last month and so Ron increasingly finds himself caring for her. They have all the basic amenities within the village but as the couple do not own a car, they rely heavily on family and friends to access more key services such as supermarkets and hospitals.

Funding: Medium

Timescale: 12 Months

Delivery Model: Public

Output Specification

Grand Challenges

- ✓ How can rural transport be made more operationally sustainable in the long term?
- ✓ How can the Net Zero challenge be met in rural areas?
- ✓ How can rural mobility be more equitable for residents and visitors?
- ✓ How can accessing daily needs be made more affordable for residents and visitors?
- ✓ How can the needs of rural communities be met more locally?
- ✓ How can tourism-related mobility become more sustainable?

Administrative Boundary / Geography

- Within Rural
- Rural towns and villages

Digital and Telephone-Based Public Sector Services

Mobile Service Provision

Sharing and Co-location of Services at Venues within Rural Communities

Liveable Rural Communities

- ✓ Enabling improved access for residents and visitors to their daily needs locally, within rural areas
- ✓ Improving intra-rural connectivity
- ✓ Delivering Net Zero in rural areas
- ✓ Delivering through cross-sectoral partnerships and funding including with communities

Peninsula Transport

Western Gateway
Sub-national Transport Body