

Analysis of rural mobility across Northern England: Summary Analytical Report

January 2025



About Transport for the North

Transport for the North is a statutory sub-national transport body, working with mayoral combined authorities, local transport authorities and other stakeholders across the North of England. We advise central government on the strategic ambitions and priorities for the region's transport system, and work with our partners to enable delivery of investment.

Our vision is that by 2050 the North of England will have become a thriving, socially inclusive region. Our communities, businesses and places will have benefitted from sustainable economic growth, improved health and wellbeing, and access to opportunities for all. This is to be achieved through a transformed zero emission, integrated, safe and sustainable transport system, that will enhance connectivity, resilience, and journey times for all users.

For more information, please visit: www.transportfornorth.com

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Introduction

Transport for the North (TfN) is a statutory body made up of elected and business leaders that together represent the North's 16 million citizens and 1.1 million businesses, including more than two million rural residents.

Building on our [rural policy position](#) (March 2022), we are focused on improving transport connectivity in rural areas, including working with our local transport partners to share knowledge, evidence and good practice that enables us to better make the case for investment in rural connectivity.

Below, we highlight our key findings from a detailed analysis of rural mobility. We have compiled data from nationally available sources and [TfN's Analytical Framework](#), to advance the evidence base so that local partners can use it to make stronger business cases for improving rural connectivity.

Our analysis considers rural transport from three perspectives: across England, the North of England, and North Yorkshire specifically. We included a case study to enable a more localised analysis within the North and better understand the diverse rural characteristics of North Yorkshire. We have considered key factors affecting rural mobility, including local economic conditions, current transport connectivity, and outputs from our transport models, offering a thorough insight of rural transport challenges and opportunities.



Approach

Our rural analysis utilises TfN's Analytical Framework, our consistent approach to data, modelling and appraisal for all transport modes across the North.

To distinguish rural from urban areas, TfN uses area type classifications based on Office for National Statistics (ONS)'s [RUC classifications approach](#) at Middle Super Output Area (MSOA) level, data and Local Authority classifications where more detailed data is unavailable.

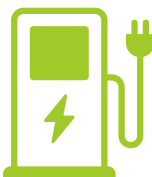
Key findings: England



Nationally, rural households spend a larger proportion of their weekly income (£38 more)¹ on transport compared to urban households (Figure 1). These higher weekly transport costs for rural communities can limit access to opportunities and increase social exclusion. Our evidence shows that for rural village residents, transport is their highest living cost at £131 per week pre-pandemic, using up 15% of their income.²



In addition to travel costs, reliability and accessibility are significant issues for rural transport. As a result, **high car dependency is prevalent across much of England's rural areas**, with 90% of trips made by private car in rural regions compared to 72% in urban areas.³ The average rural resident also travels much further annually across all modes, (6,500 miles versus 3,661 miles in urban areas).⁴



Given high car dependency in rural areas, supporting the future transition to electric vehicles is important for rural transport decarbonisation. However, **our analysis using ZapMap data shows that rural areas have fewer publicly available electric vehicle charging points**, with 45 per 100,000 people, compared to 62 per 100,000 people in urban areas.⁵



Due to greater travel costs and distance travelled in rural areas, strong digital connectivity is essential for work, shopping and leisure to reduce the need to travel, yet **evidence from Ofcom shows rural areas experience slower broadband speeds** (43 Mbit/s versus 81 Mbit/s in urban areas)⁶, impacting England's 1.5 million rural home workers⁷ and **constraining economic productivity**.

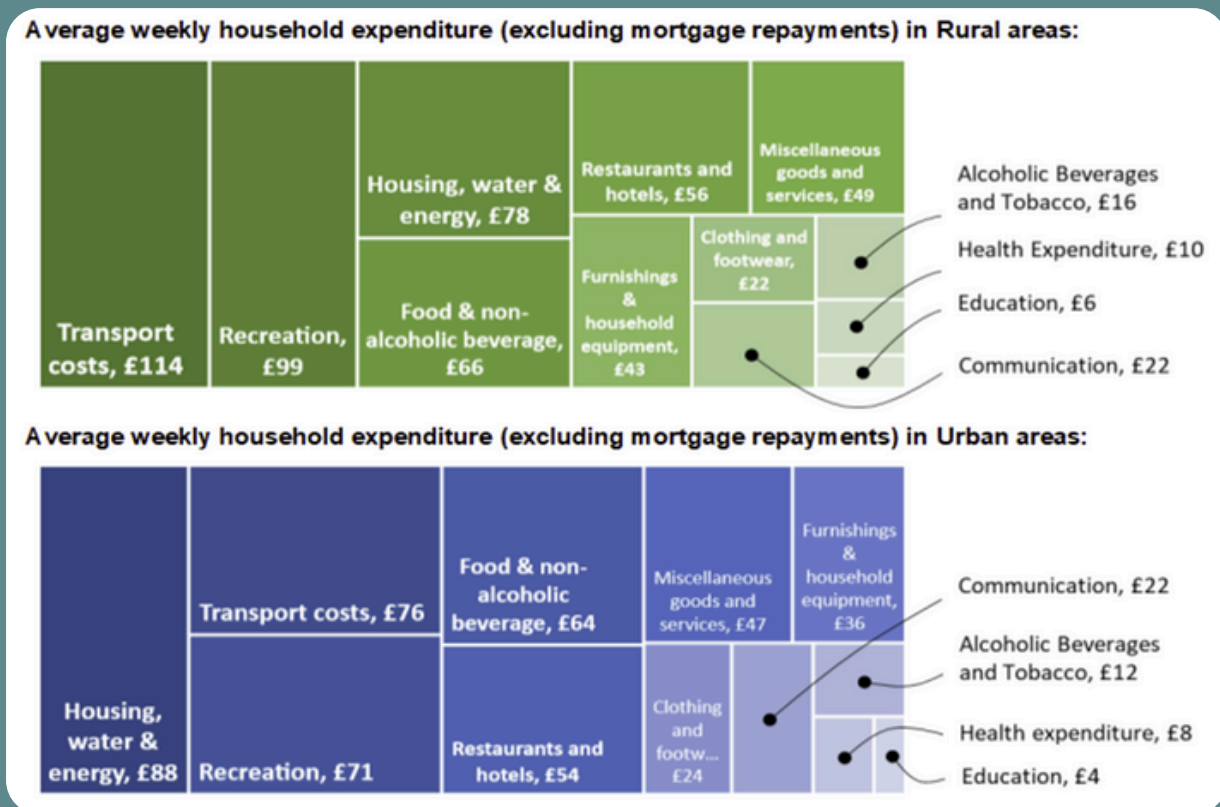


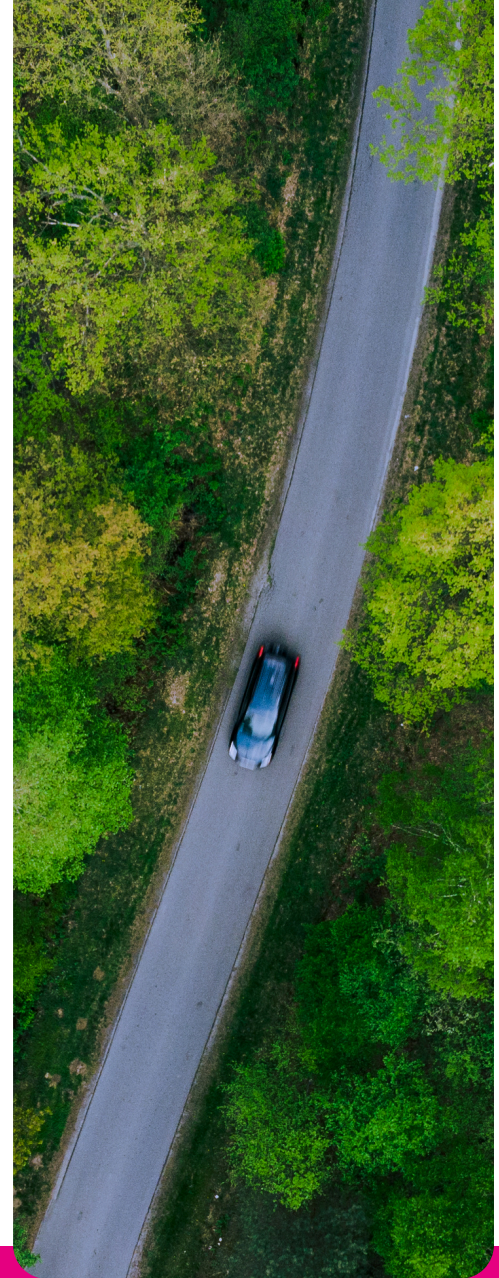
Figure 1: Average weekly household expenditure (excluding mortgage repayments) in rural vs urban areas. Source: Defra, 2021 based on Office for National Statistics Living Costs and Food Survey.

Key findings: The North

In 2021, over two million people resided in the rural North. The North's rural population is notably older, with over 25% aged over 65.⁸ The prominence of ageing populations across the rural North, amplifies the importance of reliable and accessible public transport connectivity to provide access to key services and reduce transport related social exclusion.

This is vital to provide real alternatives in rural areas to private car use, particularly for rural groups who lack private car access and face increased social exclusion. Our analysis shows car ownership in the rural North is greater within rural areas compared to urban areas across the North (87% vs 73%), as shown in Figure 2. However, there remains 13% of rural households without car access, the highest proportions are single individuals aged 66 and over, other one-person households, and lone-parent families.

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Car availability by area type in the North

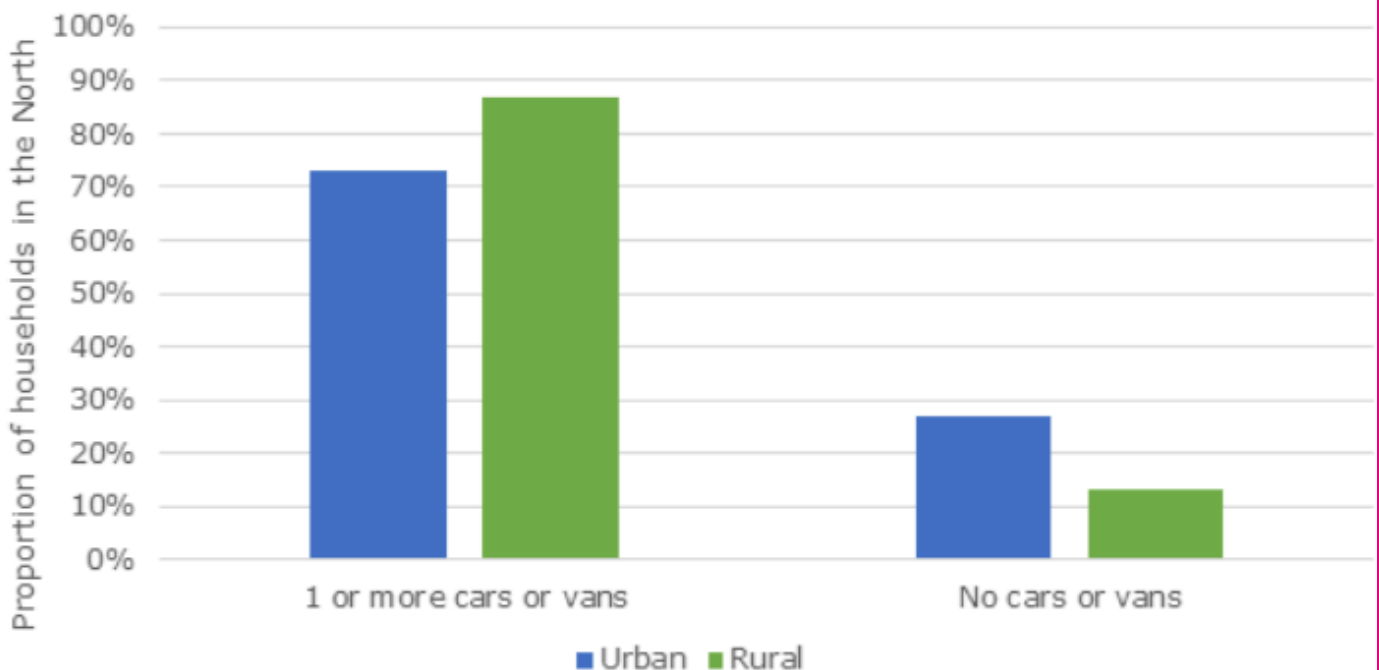
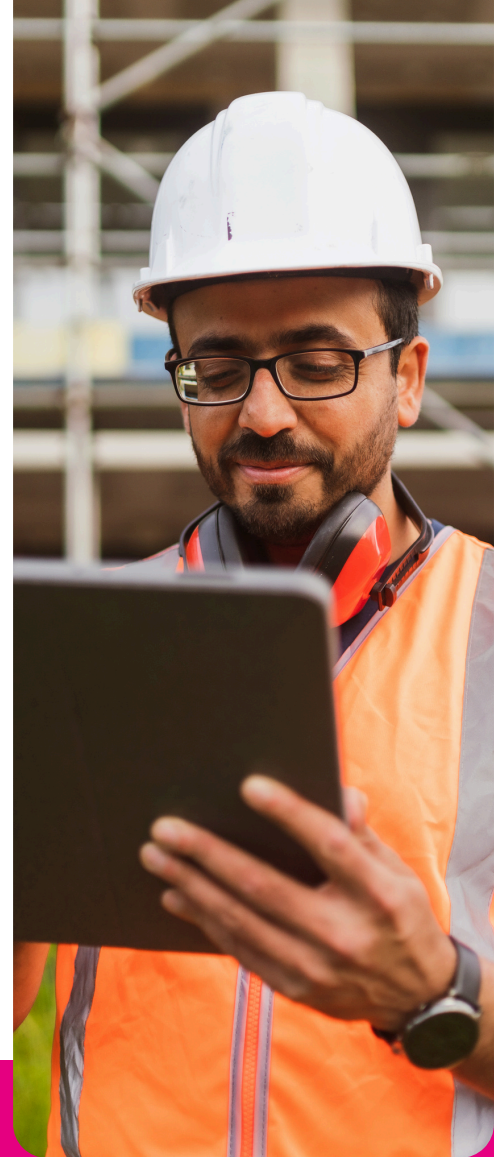


Figure 2: Proportion of households' car availability by area type in the North. Source: [Office for National Statistics, Census 2021](#).

Key findings: The North

Across the North, many rural workers (64%) operate in highly skilled occupations, employed as managers, in skilled trades, or in professional roles. They also undertake a higher percentage of business trips compared to their urban counterparts, highlighting the importance of rail connectivity for rural areas to contribute to the North's economy.

As identified nationally, for skilled rural workers in the North, inconsistent digital connectivity represents a barrier to employment and opportunities, with internet speeds in certain rural areas averaging just 27 Mbit/s compared to the North's average of 54 Mbit/s (Figure 3).¹⁰



Average download speed by Local Authority District in the North

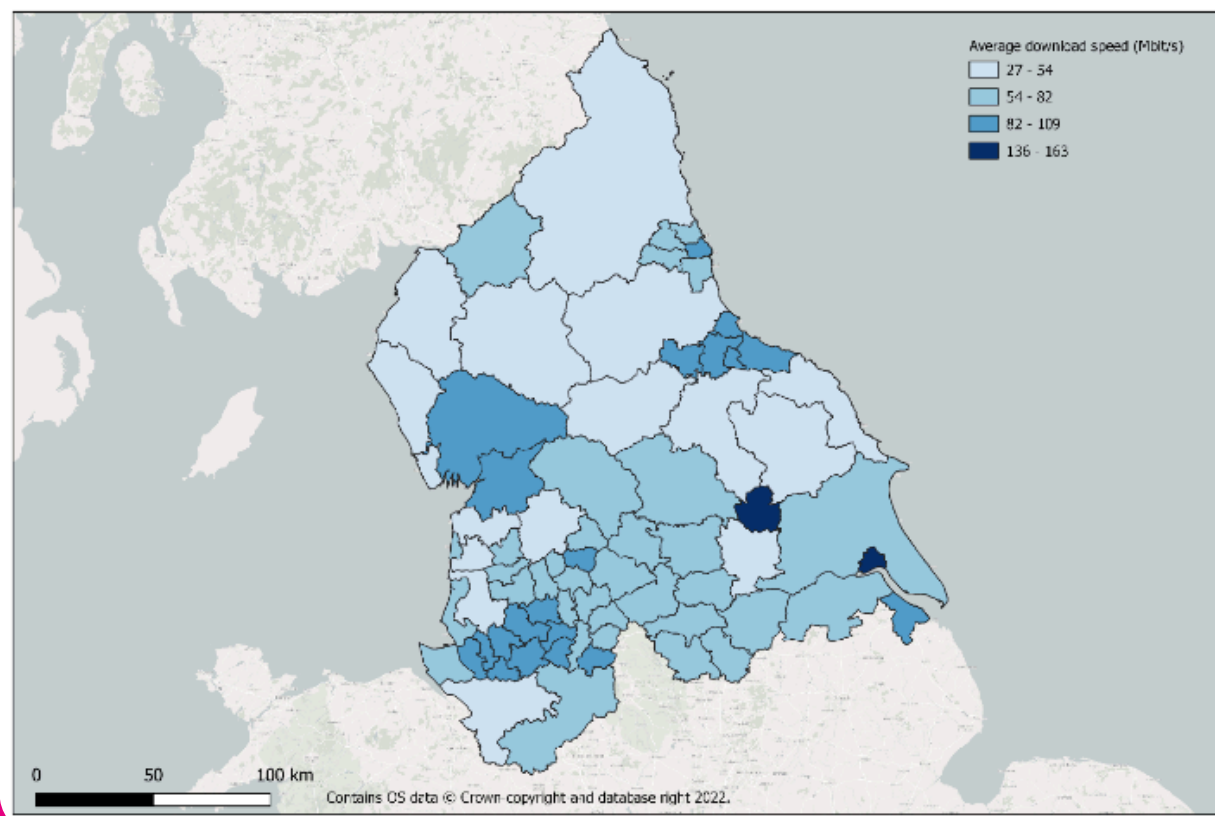


Figure 3: Average download speed (Mbit/s). Source: Ofcom, 2020.

Key findings: North Yorkshire

Our analysis of rural communities at a local level is consistent with our regional and national level assessment, in that rural communities are older, travel further to access basic services and are reliant on private car access.

In North Yorkshire, 55% of the population lived in rural areas in 2021. The most prominent age group is between 55 and 64, comprising almost 17% of the rural population.¹¹ This is older compared to rural areas overall across the North. Across these communities, transport-related social exclusion ranks highest in towns such as Ripon, Scarborough, and Selby, as well as coastal tourist destinations such as Whitby and parts of the North Yorkshire Moors.¹²

In North Yorkshire, 90% of households have access to a private car, with 25% of those without cars living in rural villages and fringes. Among those without cars, 52% are one-person households aged 66 and over.¹³ This reaffirms the need to maintain strong public transport connectivity for those groups without car access, whilst also accelerating the transition to electric vehicles in rural areas.

Currently, electric vehicle uptake is lower in North Yorkshire compared to the Northern average, especially in rural areas like Richmondshire. Further opportunities for modal shift are limited given reduced bus services and lower numbers of bus stops.



Key findings: North Yorkshire

Since 2012/2013, bus service kilometres in North Yorkshire have been reduced by almost 50%, more recent increases in 2021/22 are largely attributed to commercial services. Meanwhile Local Authority-supported bus services, which account for 14% of total bus service kilometres, continue to decline (Figure 4).¹⁴ This reduces transport connectivity for many rural residents, notably those households without car access, further exacerbating issues of transport related social exclusion in North Yorkshire.

In addition to limited bus services in rural areas, job accessibility via private car is also limited in comparison to the North overall. During peak hours, parts of North Yorkshire record a peak of 350,000-450,000 jobs within a 60-minute drive, whereas in the North's urban conurbations, the peak exceeds 600,000.¹⁵ For rail accessibility in North Yorkshire, rail usage for business travel is higher in rural areas compared to urban areas, with commuting rates remaining broadly similar.¹⁶ This shows that where public transport services do exist, particularly for business and employment, uptake from rural residents is evident.

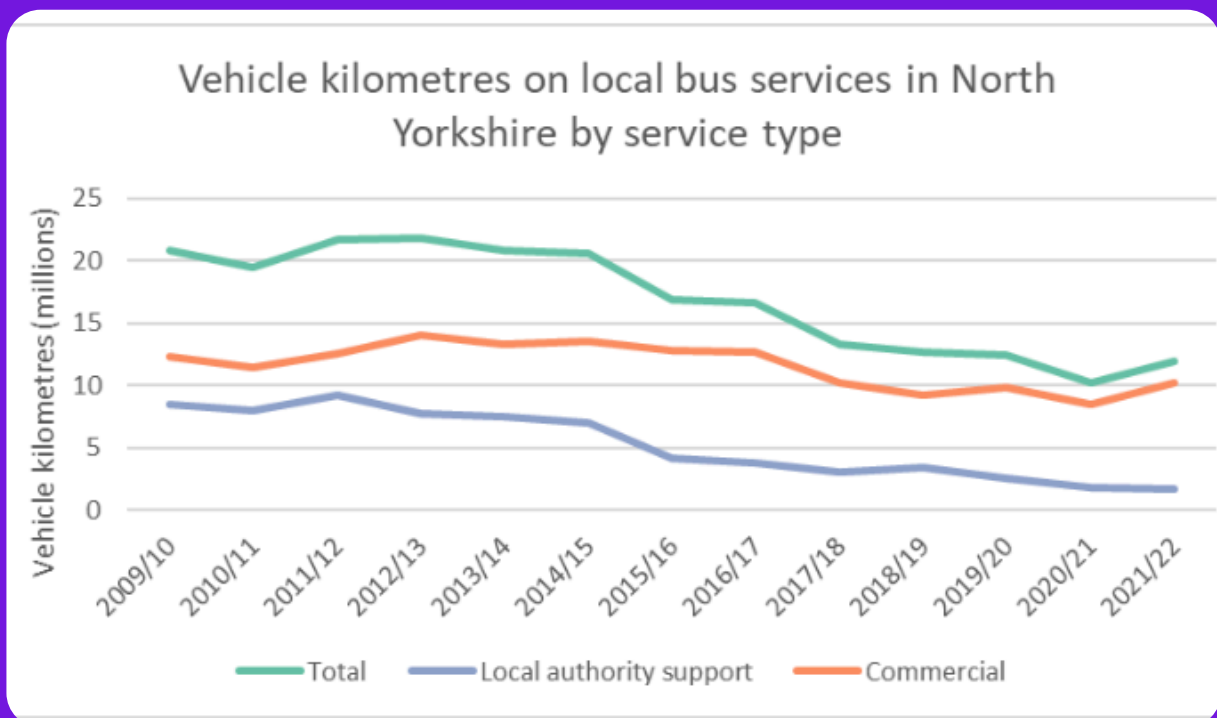


Figure 4: Vehicle kilometres on local bus services in North Yorkshire by service type. Source: DfT Public Service Vehicle Survey, March 2023.

Summary

Our work has focused on the comparison across national, regional and local levels to assess existing challenges and their variation in the context of rural mobility. We found that rural areas are underrepresented in the data which affects the models built upon them. To support our local transport partners through sharing knowledge, evidence and best practice, we will continue to enhance our analytical tools, ensuring rural areas are accurately represented.

We are updating our Northern Model Integration Tools (NorMITs) land use data, and we will review the travel trends within our models as part of a more comprehensive modelling update. This will ensure our evidence and analysis is robust and uses multiple sources to overcome the limitations of relying on single data sources.

We will also work collaboratively to consider how national sample sizes in rural data can be increased. For TfN's Analytical Framework, we will explore how we can enhance our models to better represent local areas and improve the classification of rural regions and age categories within our analytical tools and models.

Our analysis underscores the need for strategic investment in rural transport infrastructure to unlock the full potential of the North. This is required to overcome existing challenges faced across the rural North, which includes high car dependency, insufficient electric vehicle infrastructure, and in several areas, weak digital connectivity.

Delivering strategic investment in rural infrastructure, can support the outcomes of our Strategic Transport Plan across the rural North. This will unlock greater opportunities for education, business and leisure, advance outcomes for social inclusion and deliver a decarbonised transport system. It also remains vital in unlocking the entire region's potential to boost its economy by £118 billion in GVA annually by 2050.¹⁷



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evidence and analytical findings, please
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