



Market Research Presentation

For the Cornwall Council
Connecting Cornwall LTP3 surveys

24th September 2010

Research Methodology (1)

- A survey undertaken using a variety of methodologies (face-to-face on-street surveys, postal self-completion and online surveys) amongst the following audiences:
- 400 surveys were undertaken with visitors to Cornwall in the following locations:
 - Newquay (100), St Ives (100), Falmouth (100) and Looe (100).
- 1,899 surveys were undertaken with residents of Cornwall – 100 interviews in each of the 19 Community Area Networks (CANs) listed – for a full breakdown of locations, see location slide:
 - EAST – Bodmin, Bude, Camelford, Caradon, Cornwall Gateway, Launceston, Liskeard & Looe and Wadebridge and Padstow
 - CENTRAL – China Clay, Newquay & St Columb, St Agnes & Perranporth, St Austell, St Blazey/Fowey & Lostwithiel and Truro & the Roseland
 - WEST – Camborne/Pool & Redruth, Falmouth & Penryn, Hayle & St Ives, Helston & the Lizard and West Penwith

Research Methodology (2)

- 464 responses were received online – a mix of Public, Business and Staff responses:
 - 88% of whom owned their own cars with (relatively) more middle-aged people in than the other surveys (56% aged 45-64).
- Additionally c510 self-completion/postal surveys were received
 - Skewed towards older females (typically why many ratings relatively higher)
 - Around 8 in 10 owned their own cars
- 100 surveys were also mailed to the youths (aged 14-16) which took part in the qualitative focus groups. 82 responses were received – sufficient for individual cell analysis – although this group is being reported as a separate cell due to the interventions being worded and presented differently to that of the other surveys.
- NOTE: Individual data-sets by Community Area Network can be provided to CAN managers if required in Excel – combined with analysis of ratings by MEAN score.

Research Objectives

- To rate the importance of each of the 6 transport goals of the LTP3 – to determine relative importance by each socio-geo-demographic group.
- For each goal, to rate the importance a number of supporting ‘proposals’ – again to determine relative importance.
- Post-analysis to identify which are the ‘most’ important proposals and the relative importance of each of the goals – through back engineering of the importance of the groups of proposals.



Summary

Summary (1)

1. Both initial 'stated' ratings of the 6 Connecting Cornwall 'goals' and subsequent post-analysis (identifying importance determined by the rating of each goal's set of proposals) confirms that **'Equality of opportunity'** is the **priority goal** to both residents and visitors (of secondary importance in the qualitative research – notably for residents).
2. **'Community safety and individual well-being'** was a close second priority (rated most important in the Somerset LTP3 research) – and was actually rated a significant priority by youths.
3. Consistent with the qualitative research – **'Climate Change'** was the least important goal (relatively) of the six – although its absolute increase in mean rating after post-analysis suggests that once respondents have been exposed to its proposals – notably **'Ensuring the transport system is built to last'** – then its importance may increase from initial ratings (although its relative importance does not) based on its 'name'.
4. There were key differences of course by 'type' – but the proposals 'commonly' felt to be important were – **'Ensuring the transport system is built to last', and the 'speed management' proposals.** Of particular importance to visitors (consistent with the travel habits survey) were **'reducing congestion'** and **'removing unnecessary traffic in our town centres'** – while youths / bus users alike were consistent in their support for PT-linked proposals.

Summary (2)

5. **Climate Change was typically rated higher (absolutely) by online/postal respondents – perhaps due to the comprehensiveness of the supporting materials available – however its relative positioning amongst the six goals remained unchanged.**
6. Amongst the ‘unique’ proposals rated by **online/postal respondents only** – those of **particular high levels of ‘claimed’ importance** were:
 - **Low energy street lighting and careful design**
 - **Improving journey time reliability** (consistent to qualitative focus groups)
 - **Ensuring all new development has good access to services etc.** (consistent to focus groups)
 - **Improving and expanded Cornwall’s railways**
 - **Investing and expanding rail and maritime freight transport**
 - **Efficient management of HGV traffic** (in contrast to its low level of attributed importance in the focus groups)

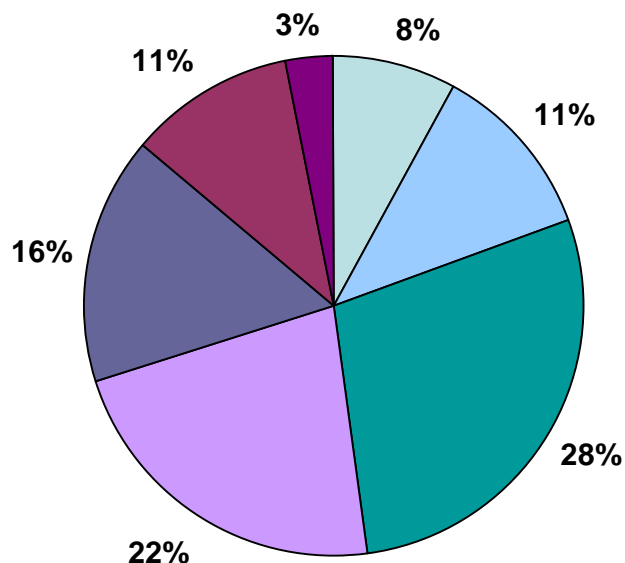


Classification

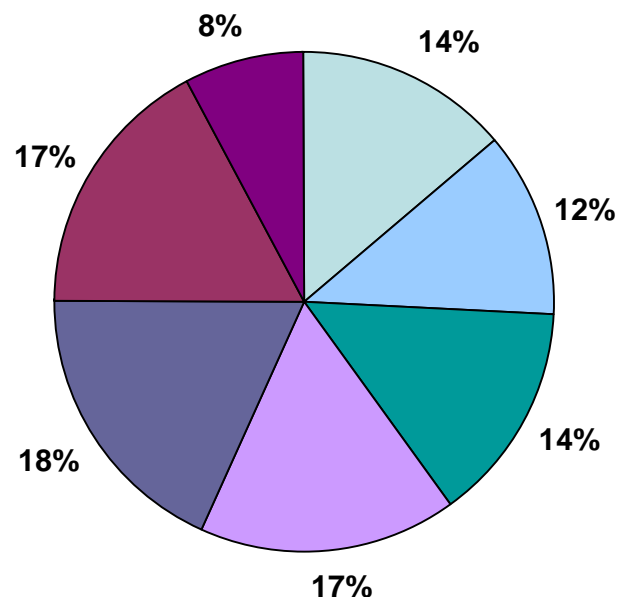
Classification (1a) – Age profile

- The age profile of residents is broadly representative of the Cornish population (see next slide). Whilst the Visitor survey was conducted on a random sampling basis – we interviewed a range of age groups – consistent with the profile achieved in the Travel Habits survey.

Visitors to Cornwall



Residents of Cornwall



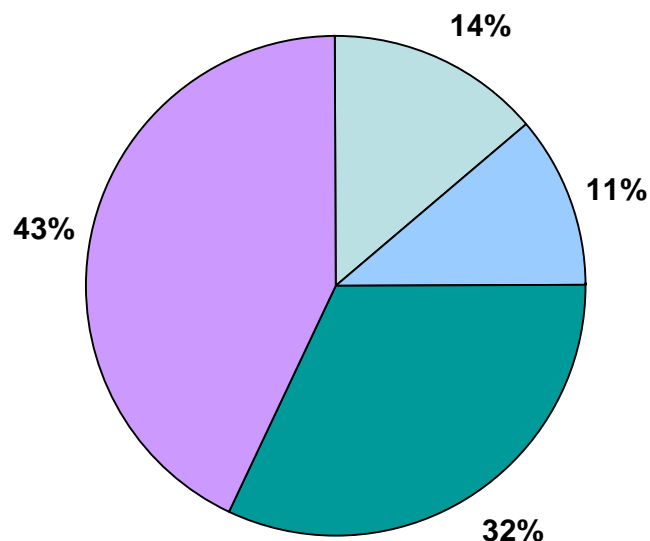
16-24 25-34 35-44 45-54 55-64 65-74 75+

16-24 25-34 35-44 45-54 55-64 65-74 75+

Classification (1b) – Age profile

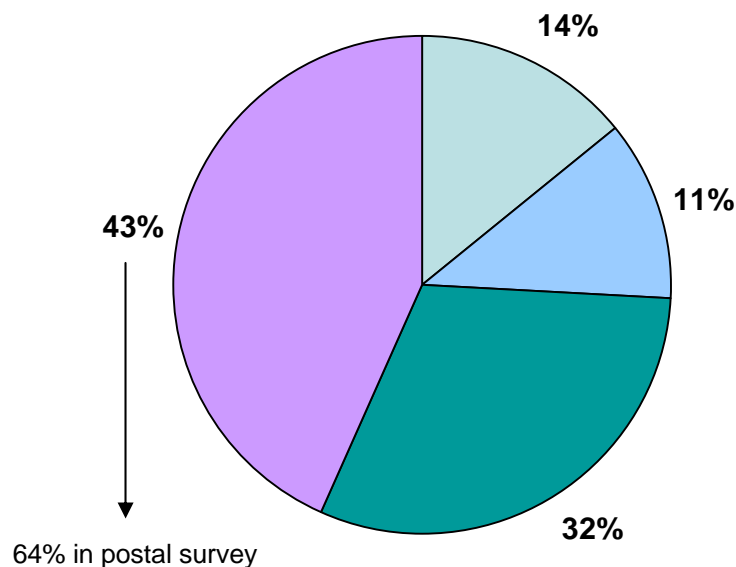
- By setting a quota sample for the Residents Travel Habits survey we were able to ensure the sample was consistent and representative of the actual Cornish population by age.

Residents of Cornwall - actual



16-24 25-34 35-54 55+

Residents of Cornwall - sample

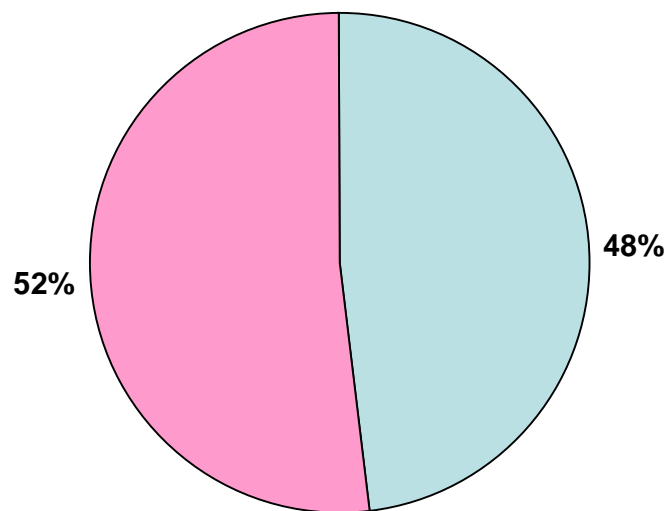


16-24 25-34 35-54 55+

Classification (2) – Gender profile

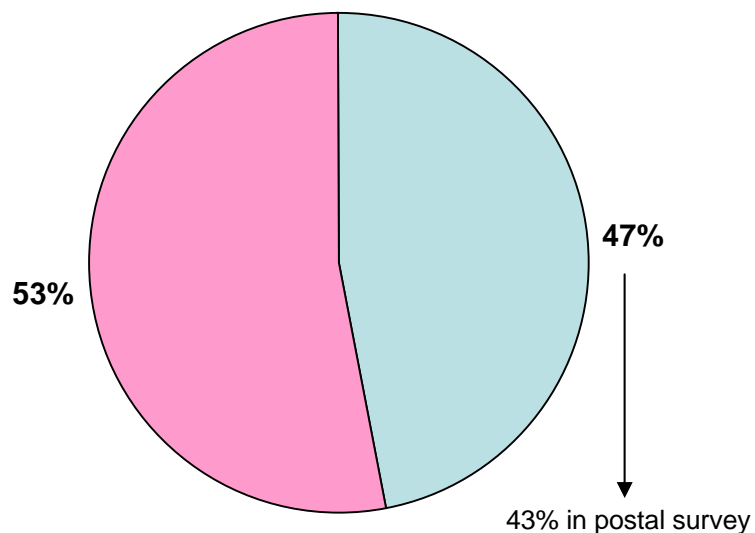
- In both surveys - the gender split of residents was representative of the Cornish population – in contrast to the random sampling of the visitor Travel Habits survey where there was a male bias.

Visitors to Cornwall



Male Female

Residents of Cornwall

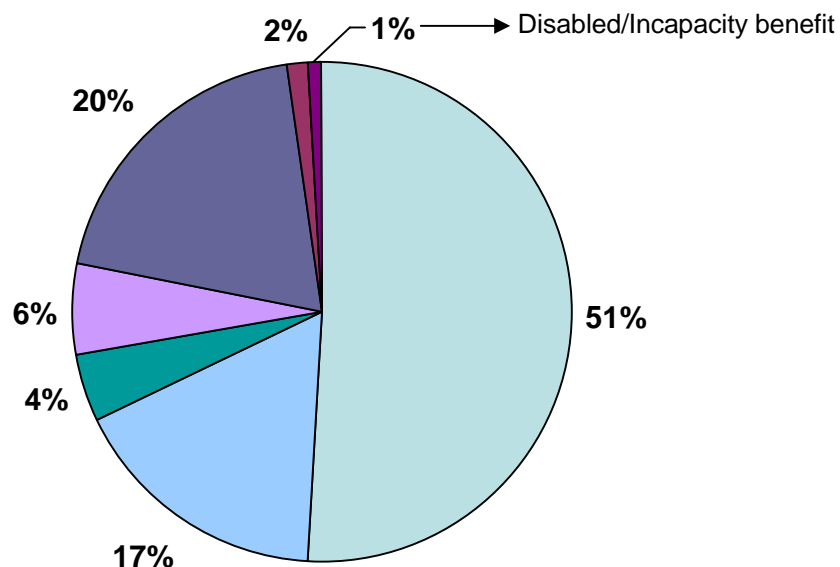


Male Female

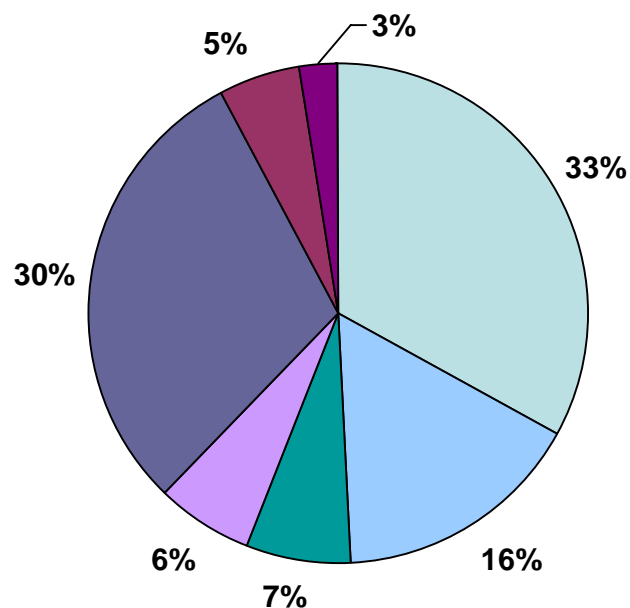
Classification (3) – Working status

- To a large extent working status is determined by the age profile – therefore considerably more in employment have been interviewed during the visitor consultation.

Visitors to Cornwall



Residents of Cornwall



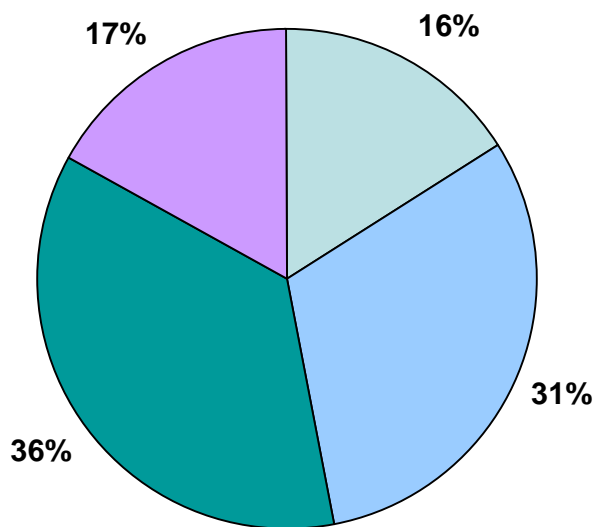
| | | |
|--------------|----------|------------|
| Work f/t | Work p/t | Student |
| House person | Retired | Unemployed |
| Other | | |

| | | |
|--------------|----------|------------|
| Work f/t | Work p/t | Student |
| House person | Retired | Unemployed |
| Other | | |

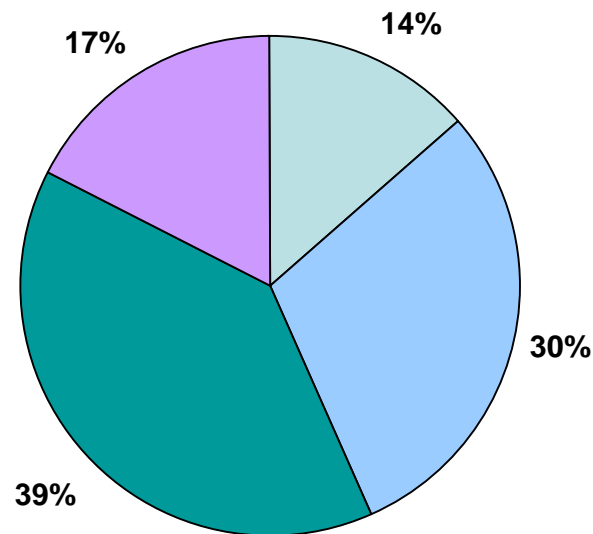
Classification (4) – Social Class (residents)

- Despite considerable difficulties in some CANs – with interviewers often resorting to ‘door-stepping’ – our sample was representative of the social class profile of Cornwall.

Social class - actual



Social class - sample



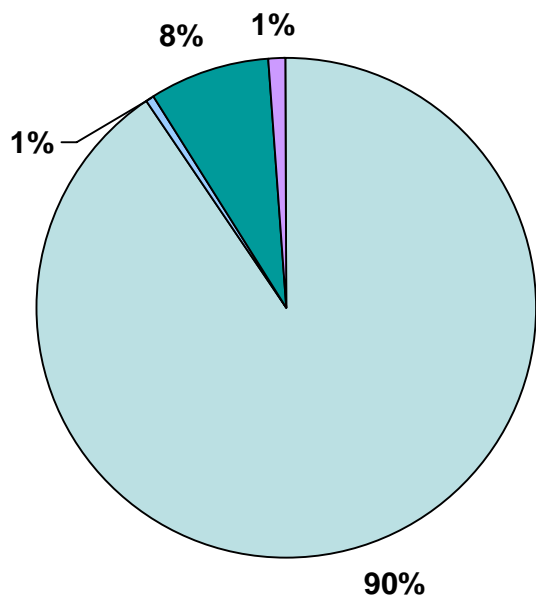
■ A/B ■ C1 ■ C2/D ■ E

■ A/B ■ C1 ■ C2/D ■ E

Classification (5) – Ethnicity

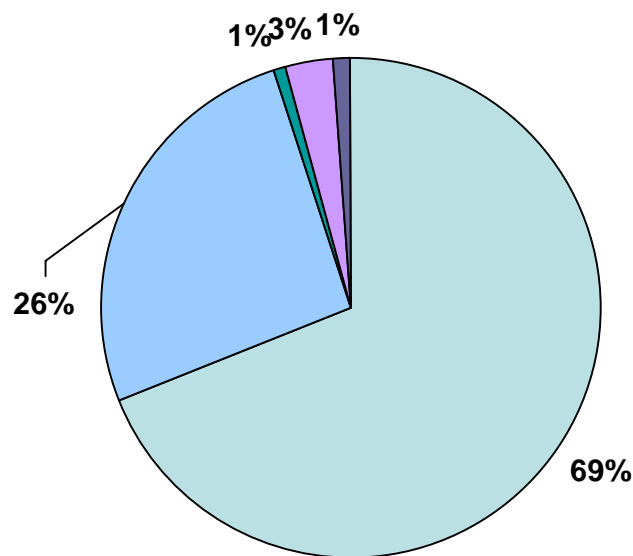
- The considerable majority of respondents were of white origin many Cornish having a preference to state White Cornish– those stating white ‘other’ typically stating ‘English’.

Visitors to Cornwall



White British White Cornish White other Other

Residents of Cornwall

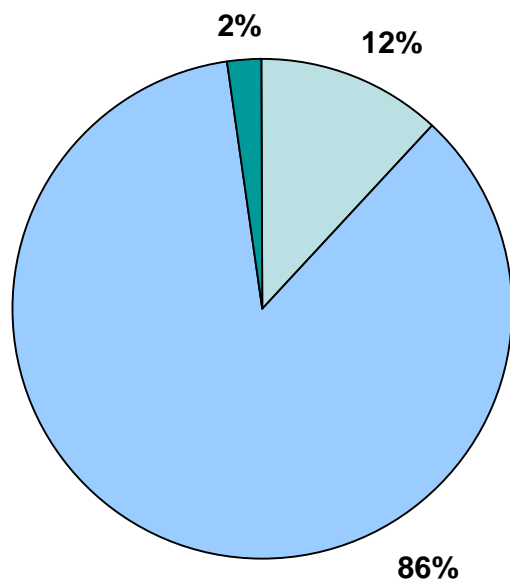


White British White Cornish White Irish
White other Other

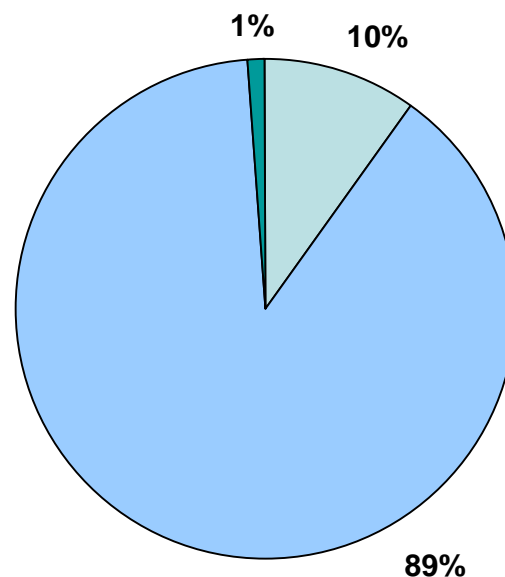
Classification (6) – DDA qualification

- c1 in 10 of respondents claimed that they were eligible for protection under the Disability Discrimination Act.

Visitors to Cornwall



Residents of Cornwall

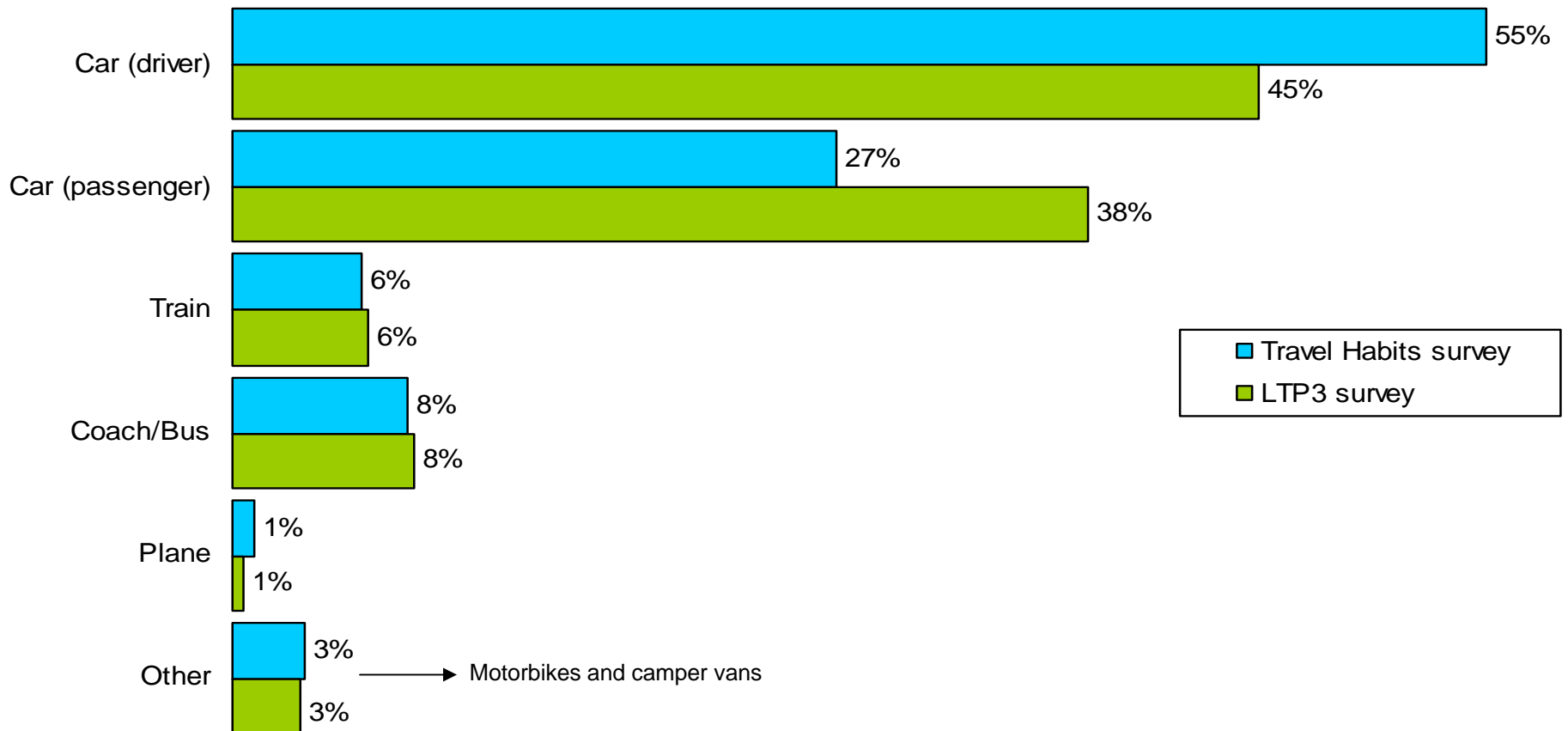


■ Yes ■ No ■ Do not wish to disclose

■ Yes ■ No ■ Do not wish to disclose

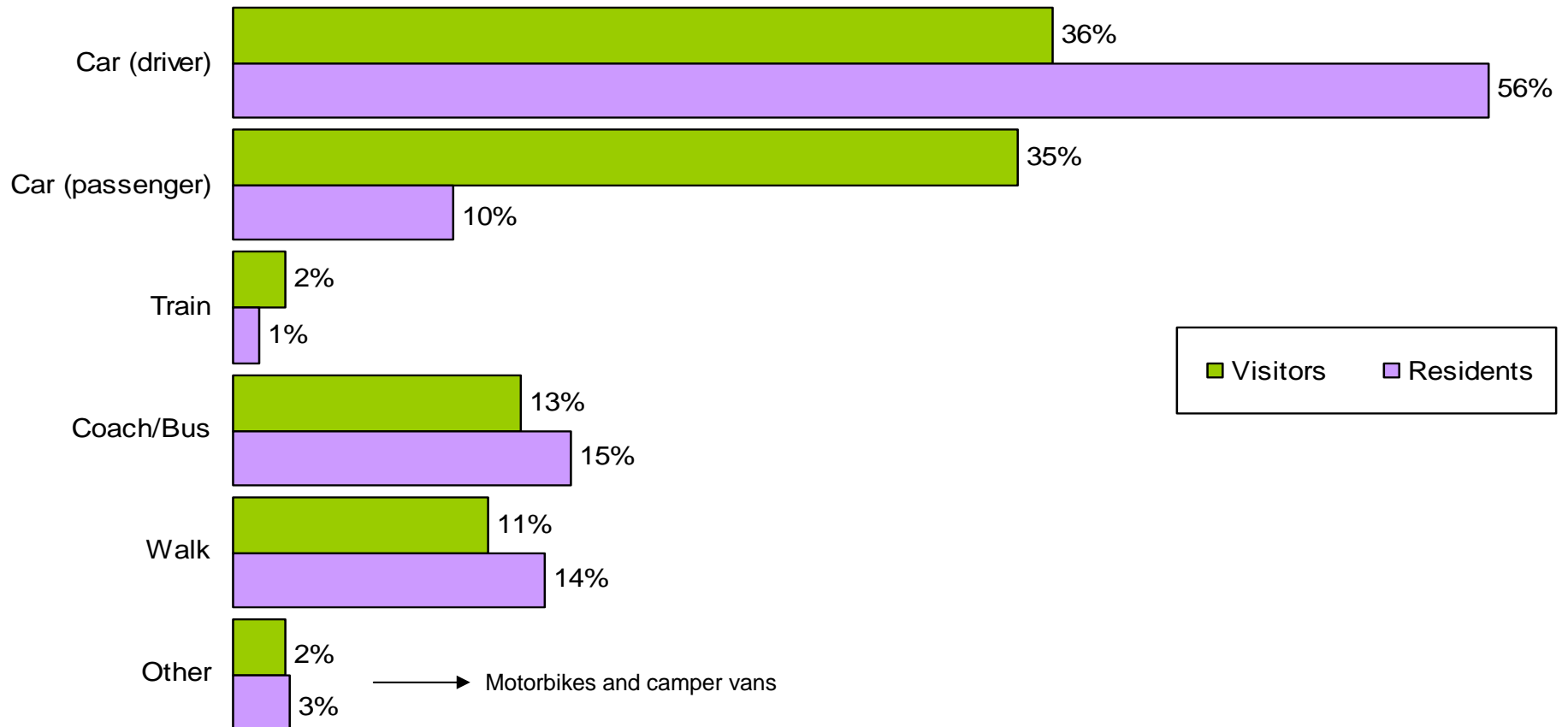
Classification (7) method of transport used to get to Cornwall (visitors only)?

- Consistent with the Travel Habits survey (although the number of 'actual' drivers is marginally less) – the majority of visitors travel to Cornwall by car – only 1 in 7 using Public Transport.



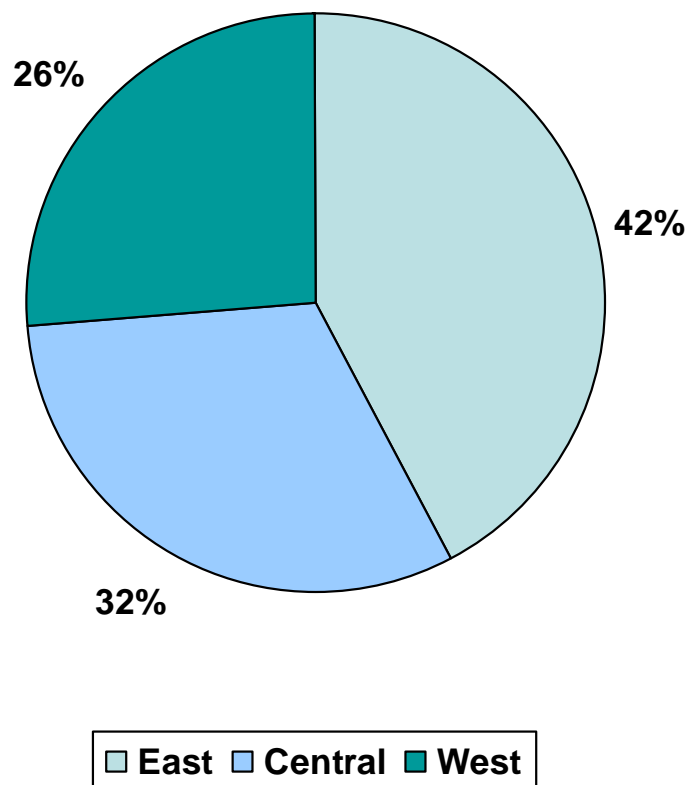
Classification (8) method of transport used to get around Cornwall?

- As identified in the Travel Habits survey there is a marginal reduction in the use of car by visitors to get around Cornwall (dependant upon journey type) – with increased use of Public Transport but more notably walking. 8 in 10 Cornish households have at least one car.



Classification (9) – Area of Cornwall

- By conducting c100 interviews in each CAN – more than 4 in 10 interviews were conducted in the East Cornwall area – although the sample sizes allow robust comparative analysis by Area.



Locations of interview

- Bodmin (60), Lanivet (20), Blisland (20)
- Bude (60), Kilkhampton (20), Week St Mary (20)
- Camborne (60), Redruth (40)
- Camelford (60), Tintagel (20), Delabole (20)
- Callington (62), Gunnislake (38)
- Bugle (60), St Dennis (20), Roche (20)
- Saltash (60), Torpoint (40)
- Falmouth (60), Penryn (39)
- St Ives (44), Hayle (55)
- Helston (60), Porthleven (40)
- Launceston (60), Stoke Climsland (20),
- Langore (9)
- Liskeard (60), Looe (40)
- Newquay (60), St Columb Major (40)
- Penzance (76), St Just (25)
- Perranporth (59), St Agnes (41)
- St Austell (60), Mevagissey (20), Par (20)
- Fowey / Lostwithiel (100)
- Truro (60), St Mawes (40)
- Wadebridge (60), Padstow (40)
- North Petherwin (9)



Rating the importance of the 6 'goals'

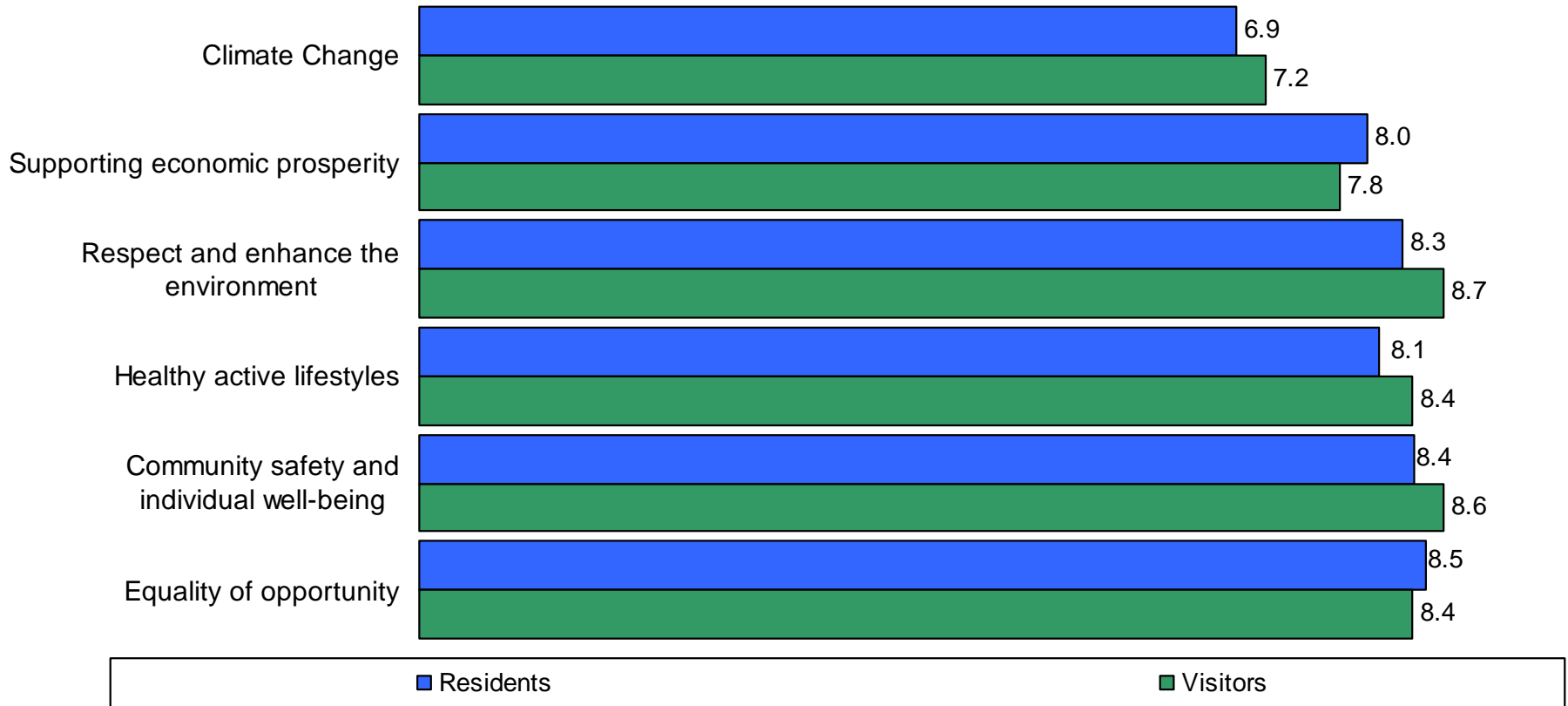
Rating of each 'goal' (1 = not at all important 10 = very important)

- All goals are rated as 'quite important' (7) or higher – with Climate Change being significantly less important – consistent with the qualitative research. Whilst the two top ratings are consistent with the secondary importance attributed to them in the qualitative research – 'supporting economic prosperity' is markedly lower.



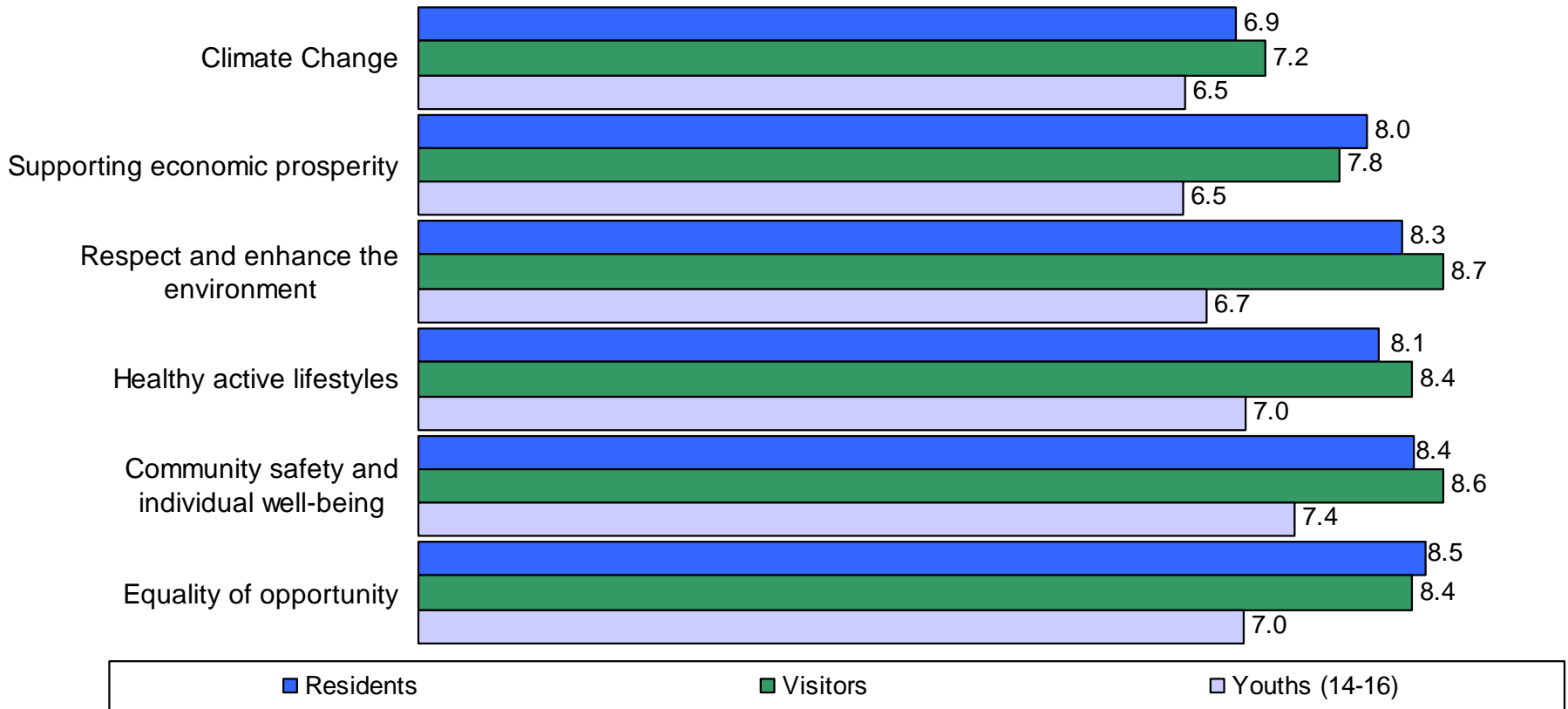
Rating of each 'goal' (1 = not at all important 10 = very important)

- The levels of importance and the relative ranking of Climate Change attributed by residents are consistent with the views of visitors also – although the visitor rating for respecting and enhancing the environment is statistically higher than that of residents (as per qualitative research).



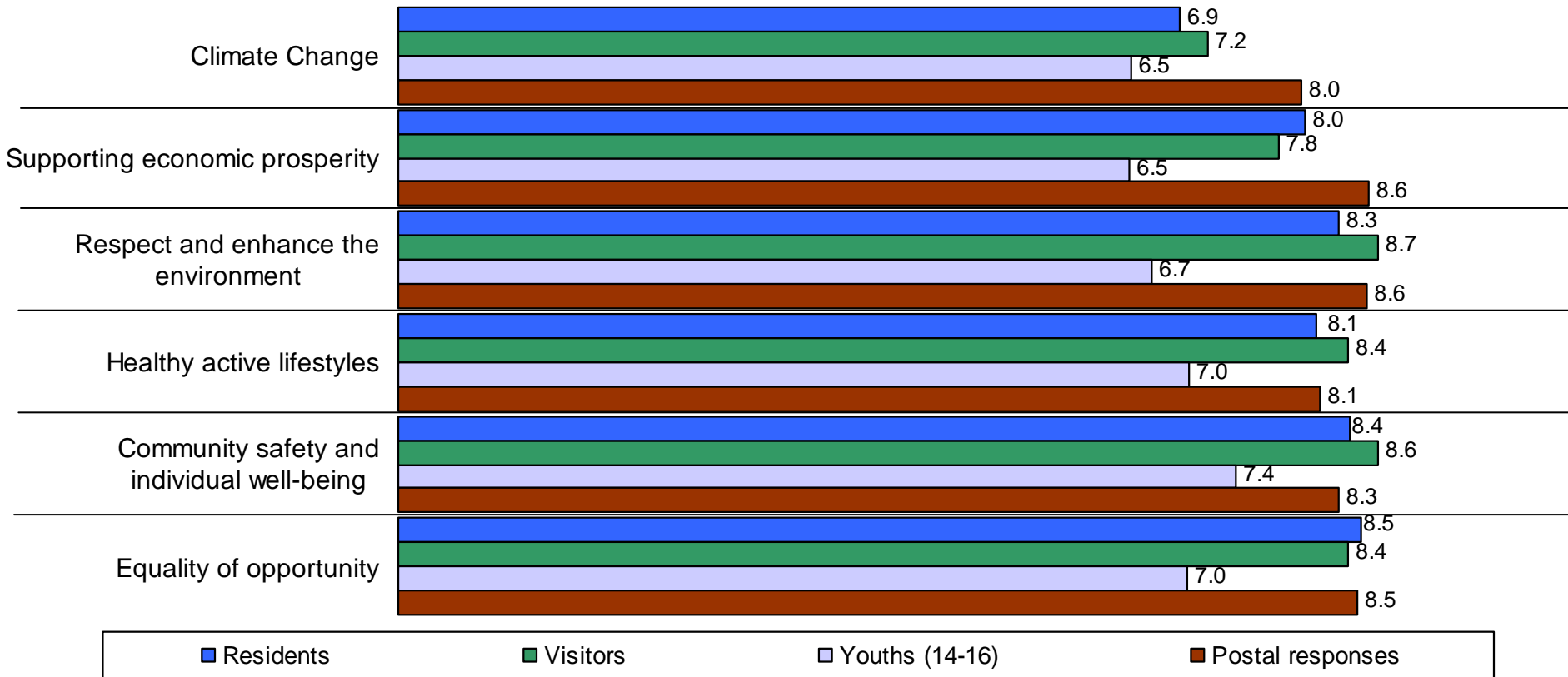
Rating of each 'goal' (1 = not at all important 10 = very important)

- The levels of importance attributed by youths are markedly weaker in all cases (notably - respecting and enhancing the environment) – but still all deemed above average.



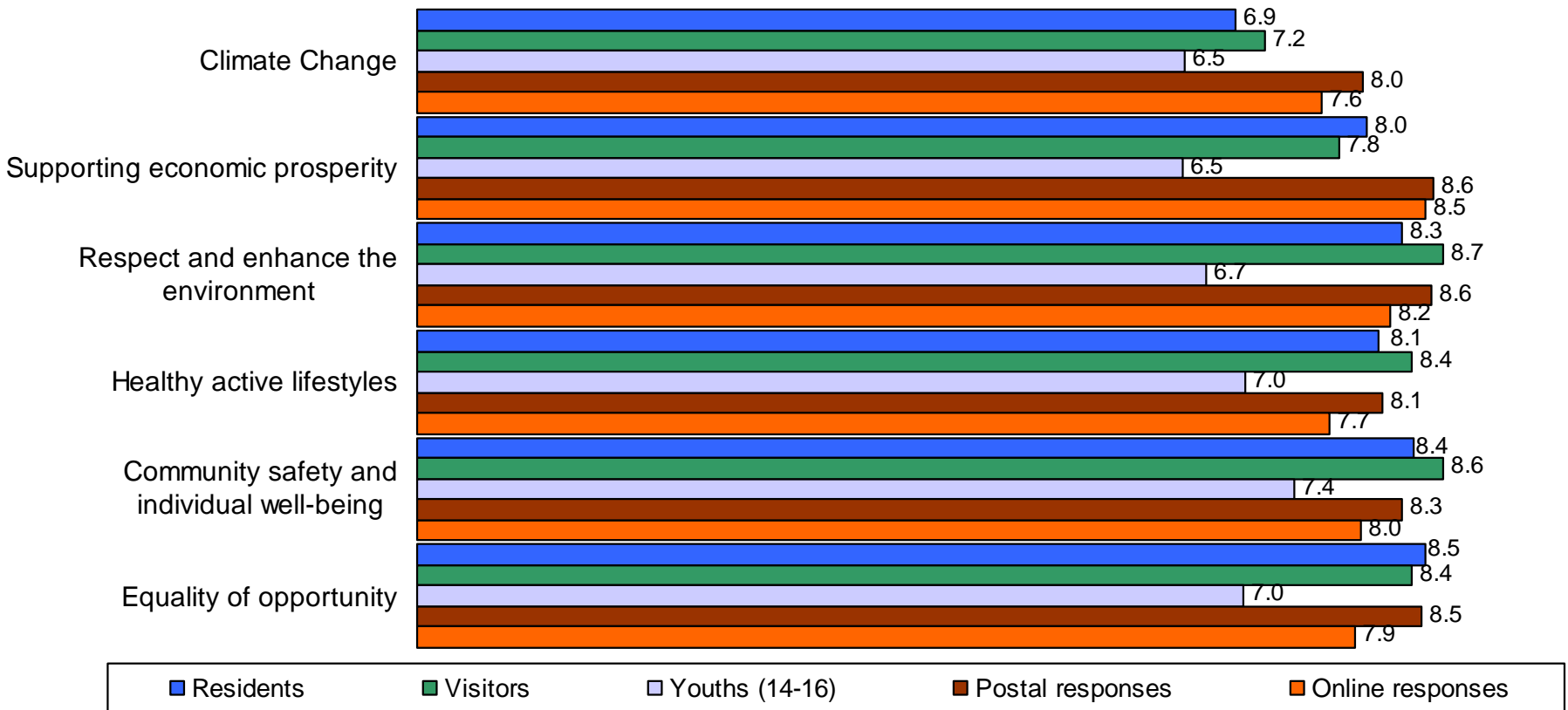
Rating of each 'goal' (1 = not at all important 10 = very important)

- Whilst those providing a postal response (with considerably more detailed information) did provide ratings in line with those of residents and visitors – the notable exceptions were for Climate Change (although relative ranking unchanged) and Supporting Economic Prosperity.



Rating of each 'goal' (1 = not at all important 10 = very important)

- Opinions of the last 3 goals are relatively less strong cf. both face to face and postal responses – although again higher ratings have been attributed to Supporting economic prosperity and Climate Change – the latter still relatively weakest.



Range (by Community Area Networks)

- **TACKLING CLIMATE CHANGE:**
 - High (9.2 St Blazey Lostwithiel and Fowey) to Low (5.8 China Clay)
- **SUPPORTING ECONOMIC PROSPERITY:**
 - High (9.7 St Blazey Lostwithiel and Fowey) to Low (7.1 China Clay)
- **RESPECT AND ENHANCE THE ENVIRONMENT:**
 - High (9.7 Hayle and St Ives) to Low (7.4 Caradon)
- **HEALTHY AND ACTIVE LIFESTYLES:**
 - High (9.0 St Blazey Lostwithiel and Fowey) to Low (7.2 Caradon)
- **COMMUNITY SAFETY AND INDIVIDUAL WELL-BEING:**
 - High (9.5 St Blazey Lostwithiel and Fowey) to Low (7.6 Caradon)
- **EQUALITY OF OPPORTUNITY:**
 - High (9.8 St Blazey Lostwithiel and Fowey) to Low (7.7 Caradon)

Range (by Age group)

- **TACKLING CLIMATE CHANGE:**
 - High (7.2 aged 35-44) to Low (6.6 aged 75+)
- **SUPPORTING ECONOMIC PROSPERITY:**
 - High (8.3 aged 25-34) to Low (6.8 aged 16-17)
- **RESPECT AND ENHANCE THE ENVIRONMENT:**
 - High (8.5 aged 45-54) to Low (7.5 aged 16-17)
- **HEALTHY AND ACTIVE LIFESTYLES:**
 - High (8.3 aged 16-17) to Low (7.3 aged 75+)
- **COMMUNITY SAFETY AND INDIVIDUAL WELL-BEING:**
 - High (8.8 aged 35-44) to Low (8.1 aged 16-17)
- **EQUALITY OF OPPORTUNITY:**
 - High (8.7 aged 35-44) to Low (8.1 aged 75+)

Range (by gender)

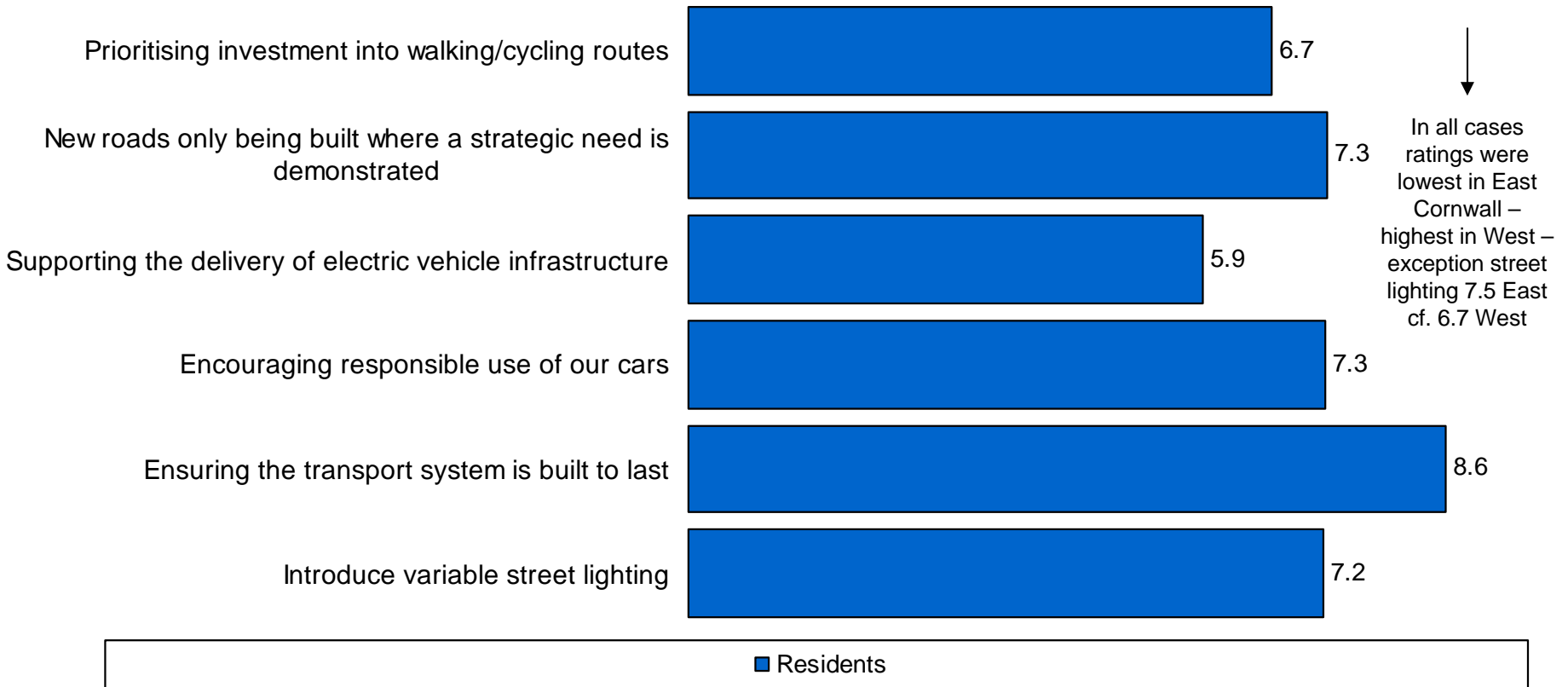
- **TACKLING CLIMATE CHANGE:**
 - MALE (6.6) cf. FEMALE (7.2)
- **SUPPORTING ECONOMIC PROSPERITY:**
 - MALE (7.9) cf. FEMALE (8.0)
- **RESPECT AND ENHANCE THE ENVIRONMENT:**
 - MALE (8.1) cf. FEMALE (8.4)
- **HEALTHY ACTIVE LIFESTYLES:**
 - MALE (7.9) cf. FEMALE (8.2)
- **COMMUNITY SAFETY AND INDIVIDUAL WELL-BEING:**
 - MALE (8.2) cf. FEMALE (8.7)
- **EQUALITY OF OPPORTUNITY:**
 - MALE (8.2) cf. FEMALE (8.7)



Rating the importance of Climate Change proposals

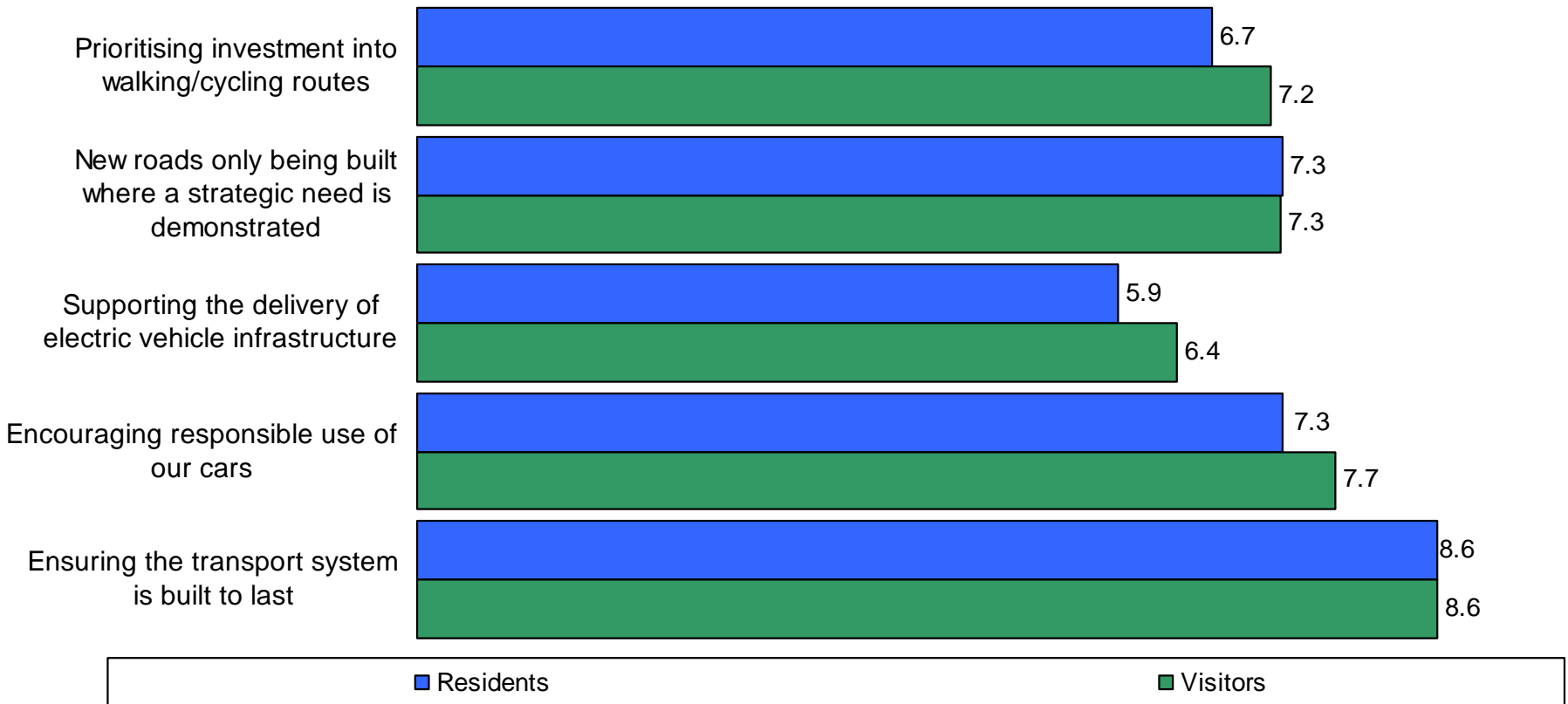
Rating of the CLIMATE CHANGE proposals

- As per the focus groups (notably the Business groups) 'ensuring the transport system is built to last' is significantly more important than any other proposal – electric vehicles being of considerably less importance and close to average importance only. Female response considerably stronger for all – notably walking/cycling routes (despite cycling less).



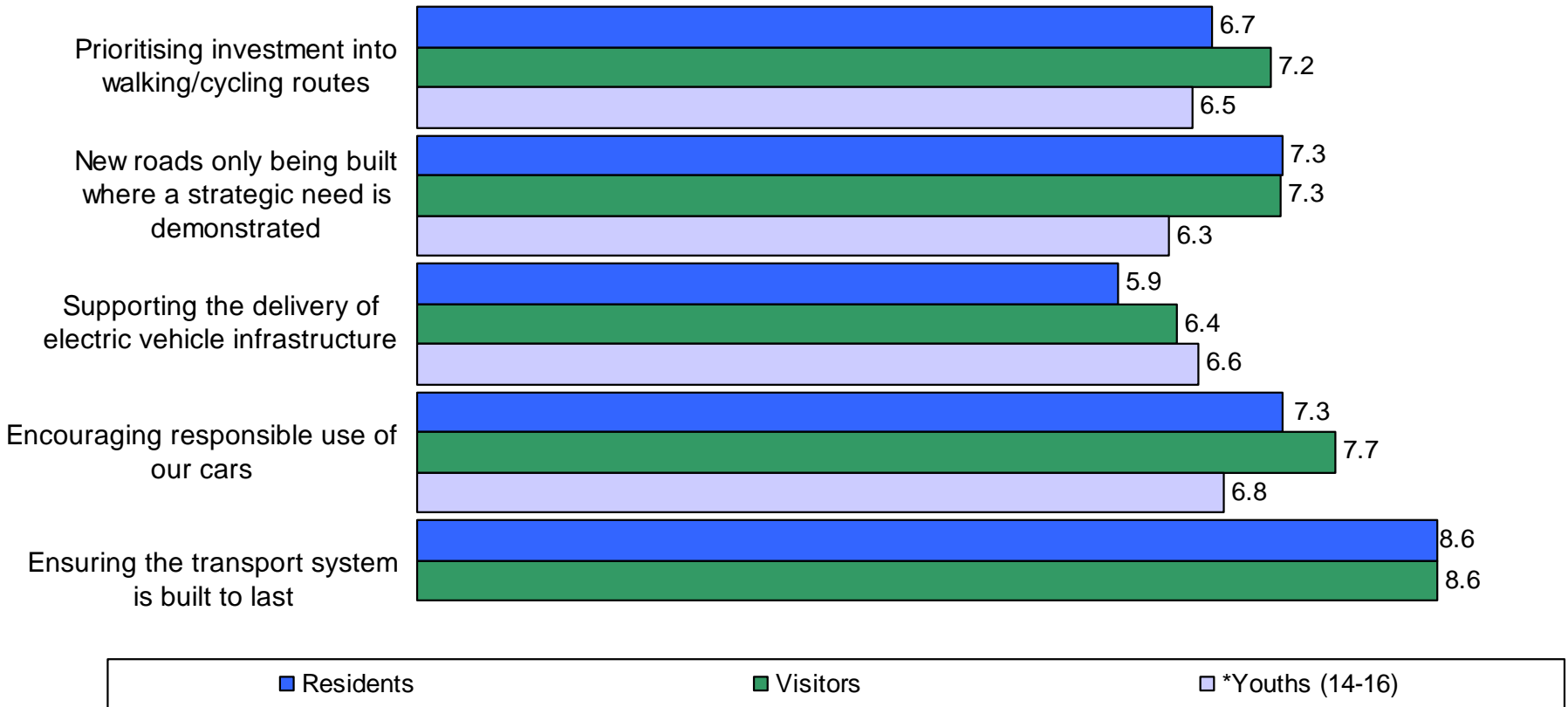
Rating of the CLIMATE CHANGE proposals

- Encouragingly, visitors are in total agreement with residents regarding the priority importance on 'ensuring the transport system is built to last' (and also new roads only being build where a strategic need can be demonstrated'.



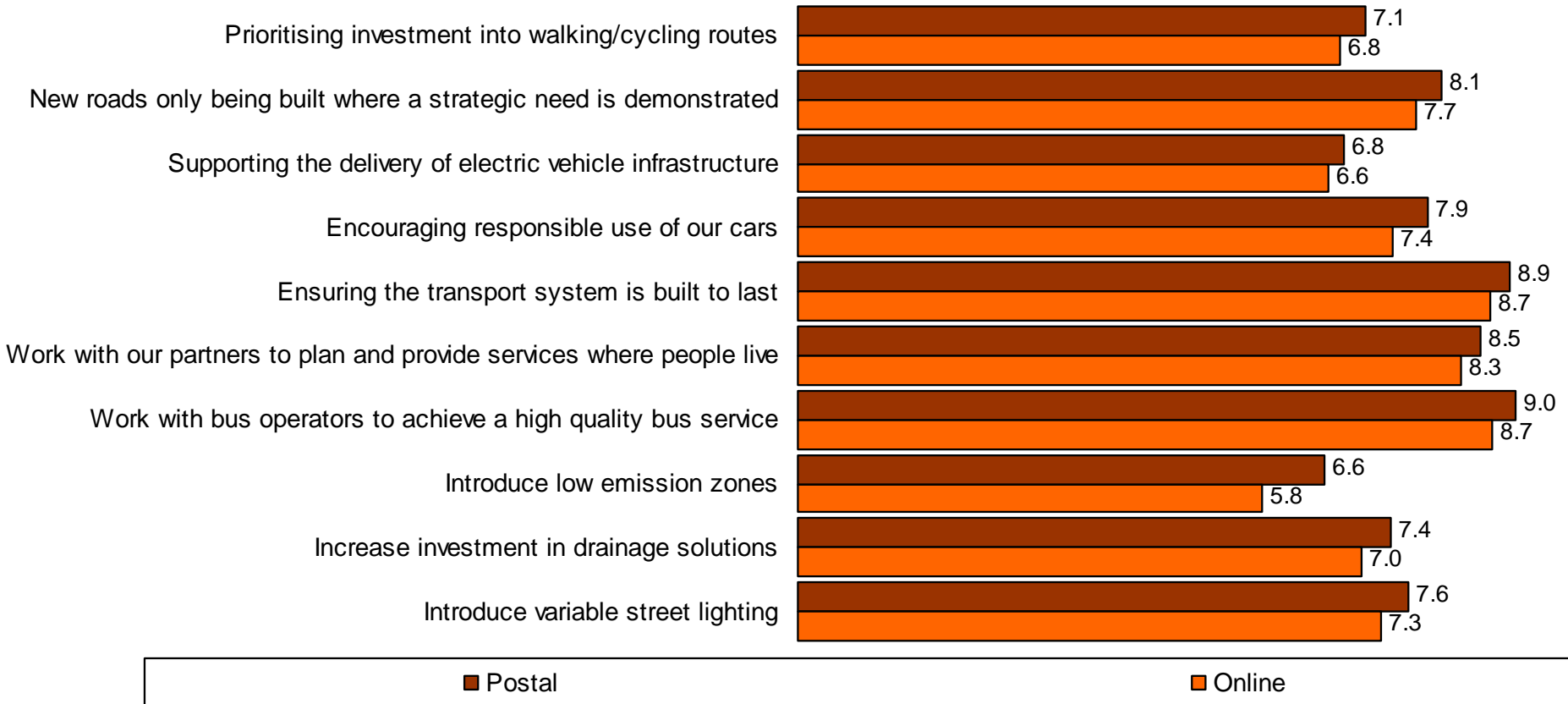
Rating of the CLIMATE CHANGE proposals

- *Note: in all cases different 'descriptors' were used for each proposal in the Youth questionnaire. Whilst sentiment is considerably more muted amongst this age group – we can see the importance attributed to walking/cycling is consistent with that of residents in general.



Rating of the CLIMATE CHANGE proposals

- Amongst both postal/online respondents 'a transport system that is built to last' is still of priority importance (alongside the quality bus service – tested as part of Supporting Economic Prosperity for other surveys).

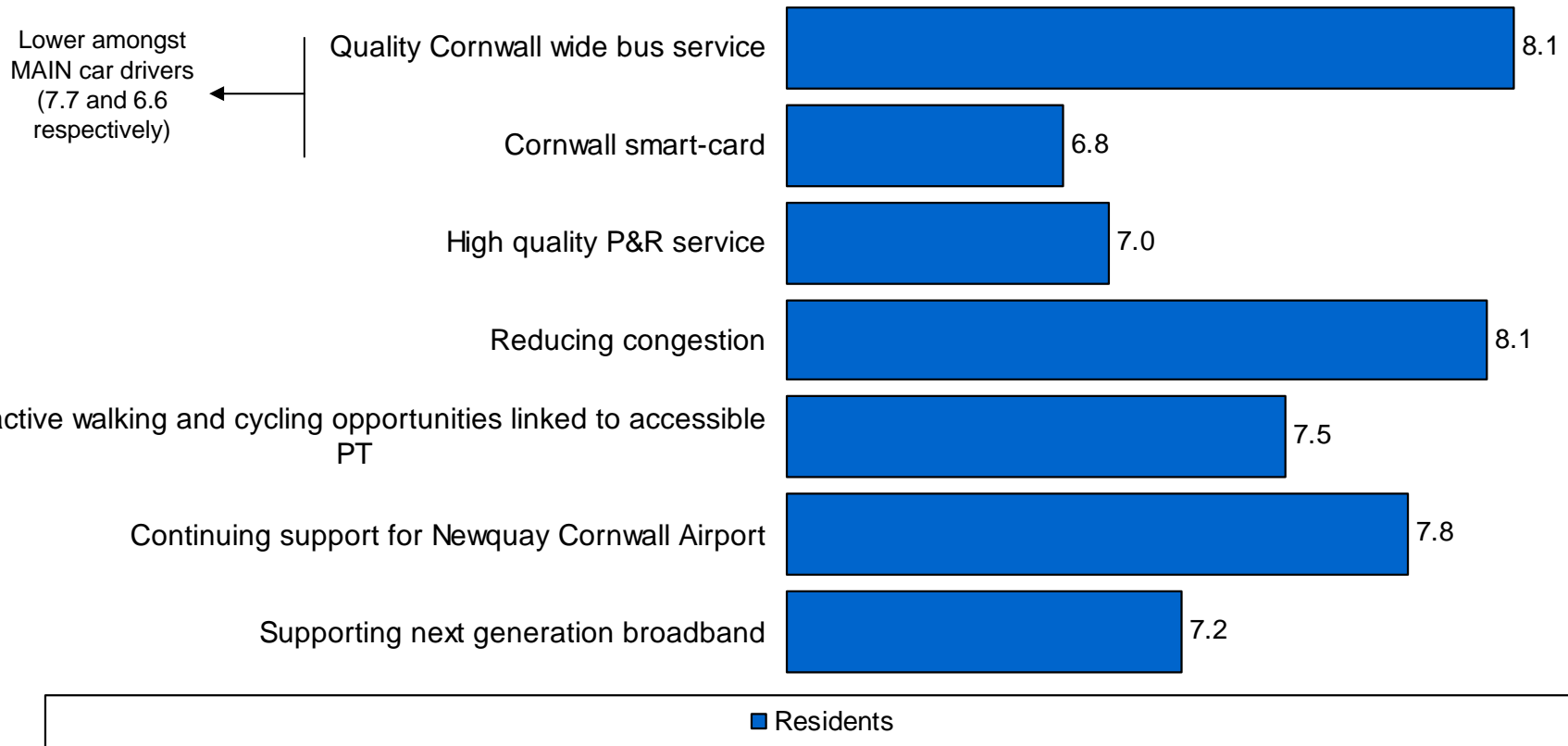




Rating the importance of Supporting economic prosperity proposals

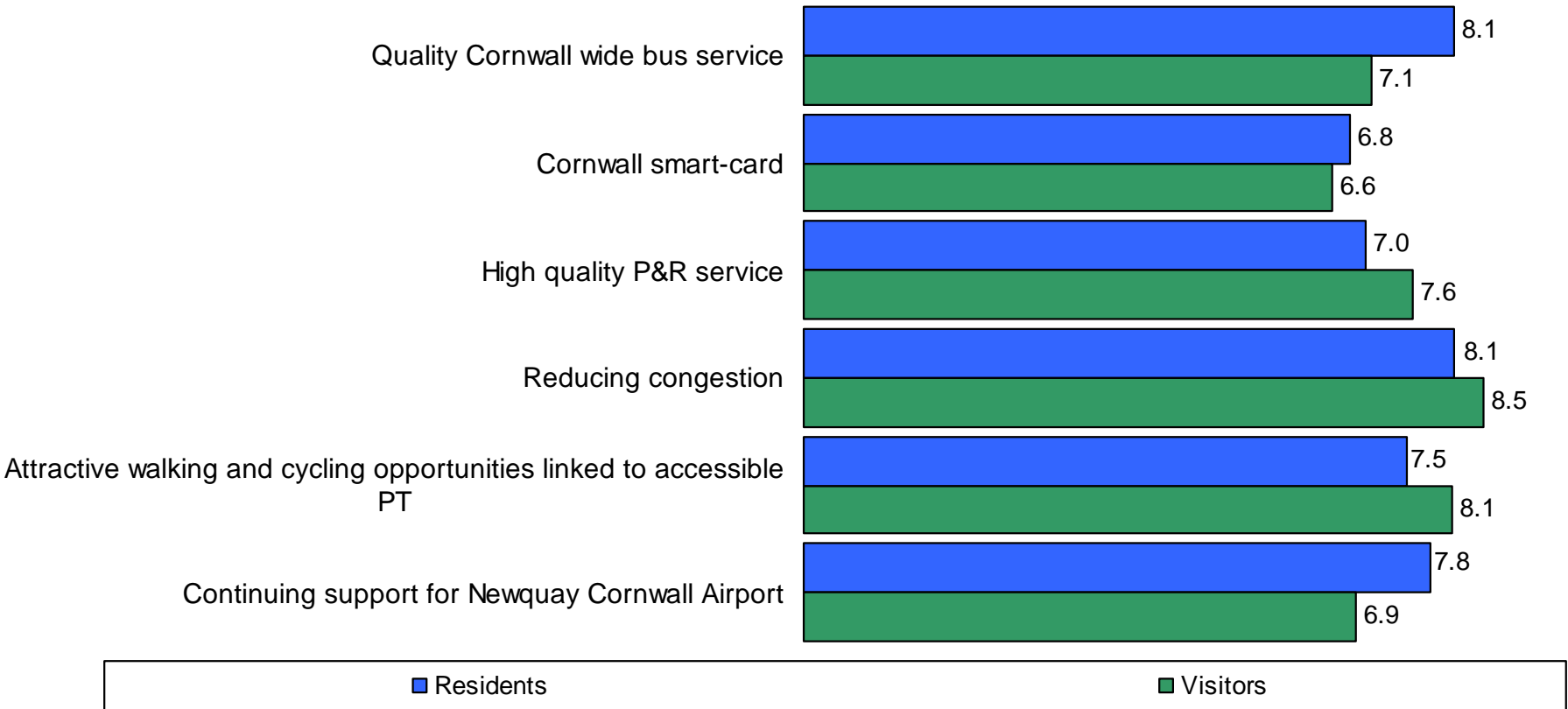
Rating of the SUPPORTING ECONOMIC PROSPERITY proposals

- As per the qualitative research the most important proposal is a 'quality Cornwall wide bus service' – however although congestion was deemed important in the focus groups its important has grown here – due no doubt to the peak summer period of consultation.



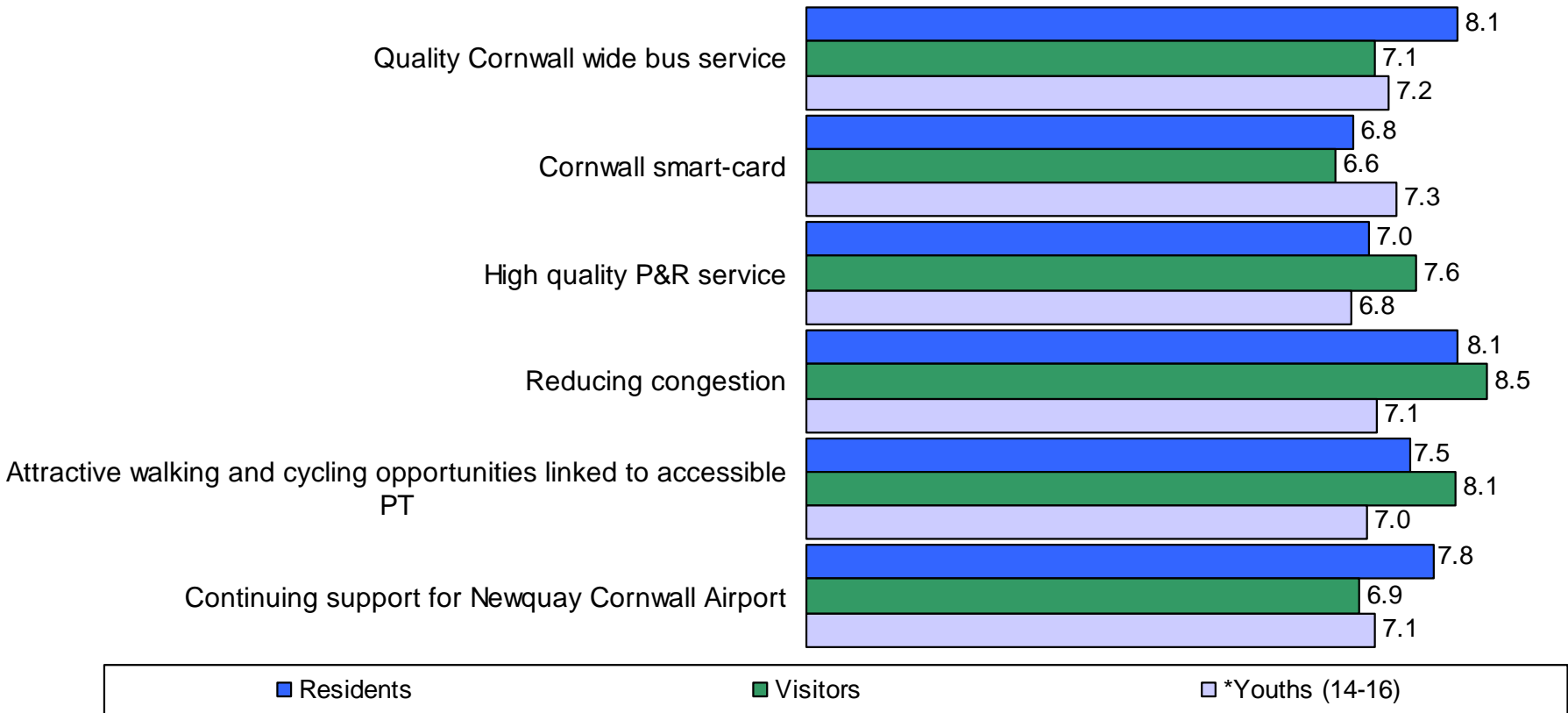
Rating of the SUPPORTING ECONOMIC PROSPERITY proposals

- Differences are more defined here – the bus service less important to visitors (the majority using and will only use their cars in the future) – with the reduction in congestion more important – making this the ‘main’ priority.



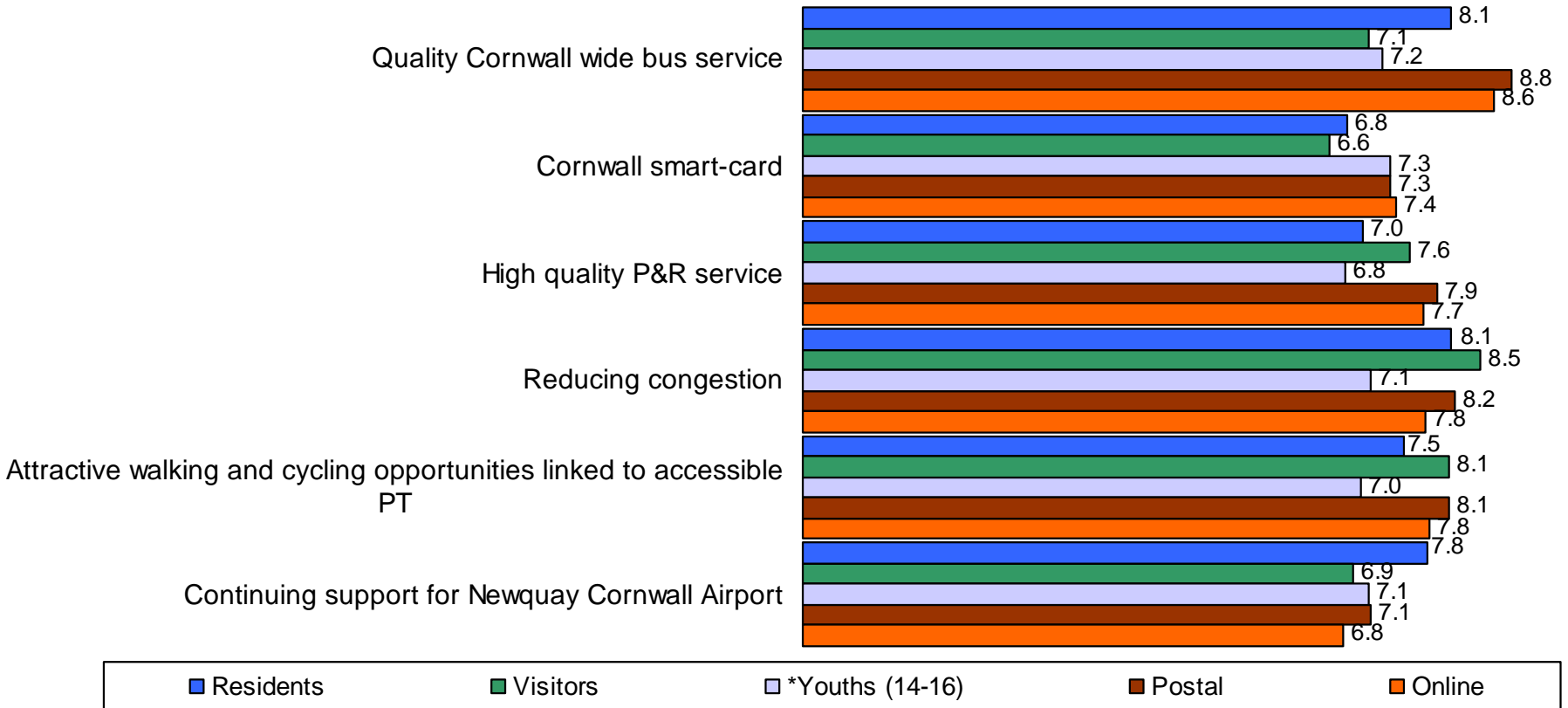
Rating of the SUPPORTING ECONOMIC PROSPERITY proposals

- Consistent with the focus groups – youths saw considerable appeal in the concept of a Smart Card – many having to use two forms of (connecting) transport to get around.



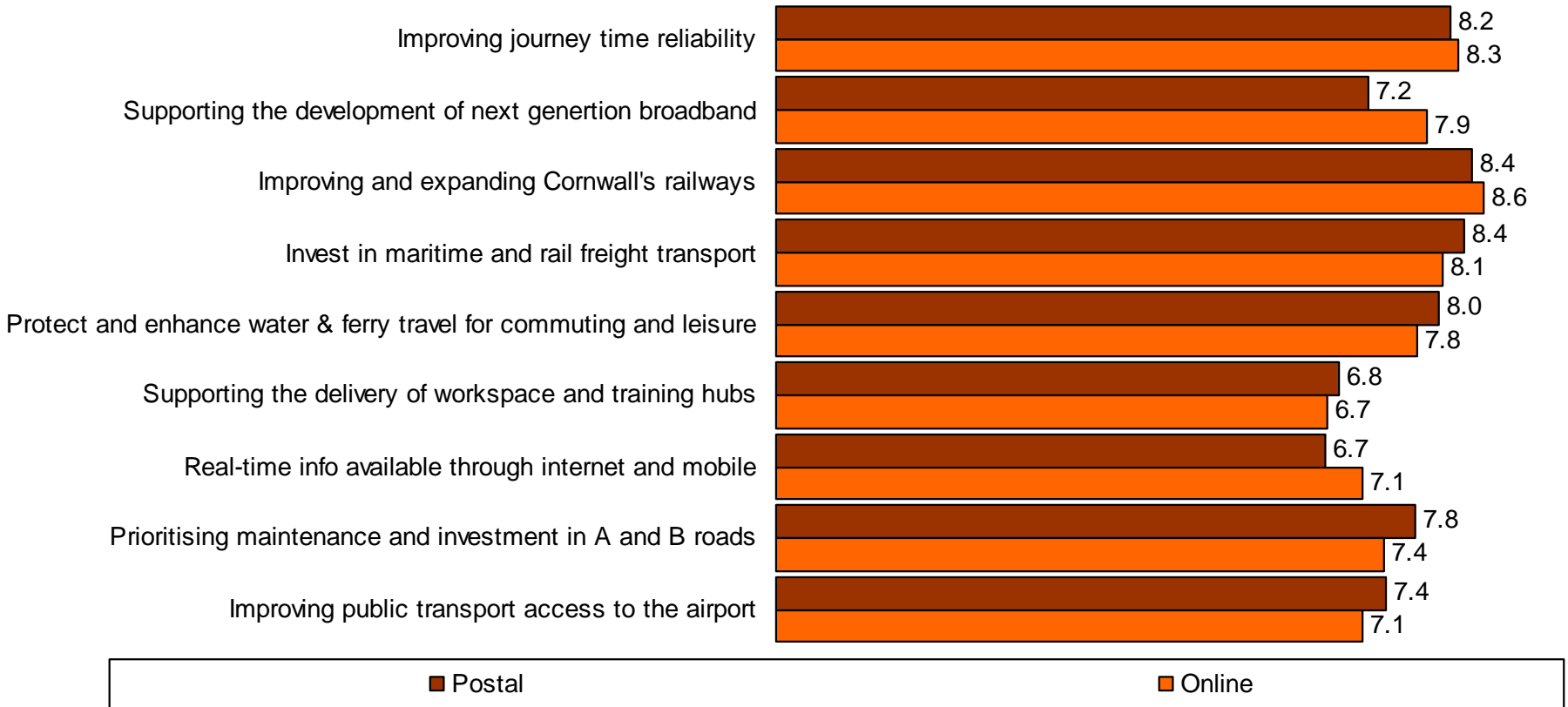
Rating of the SUPPORTING ECONOMIC PROSPERITY proposals

- Opinions for the common proposals are markedly consistent between postal/online responses and those of residents interviewed in the face-to-face survey – the bus service deemed most important (consistent with the online / postal respondents ratings as part of the Climate Change proposals).



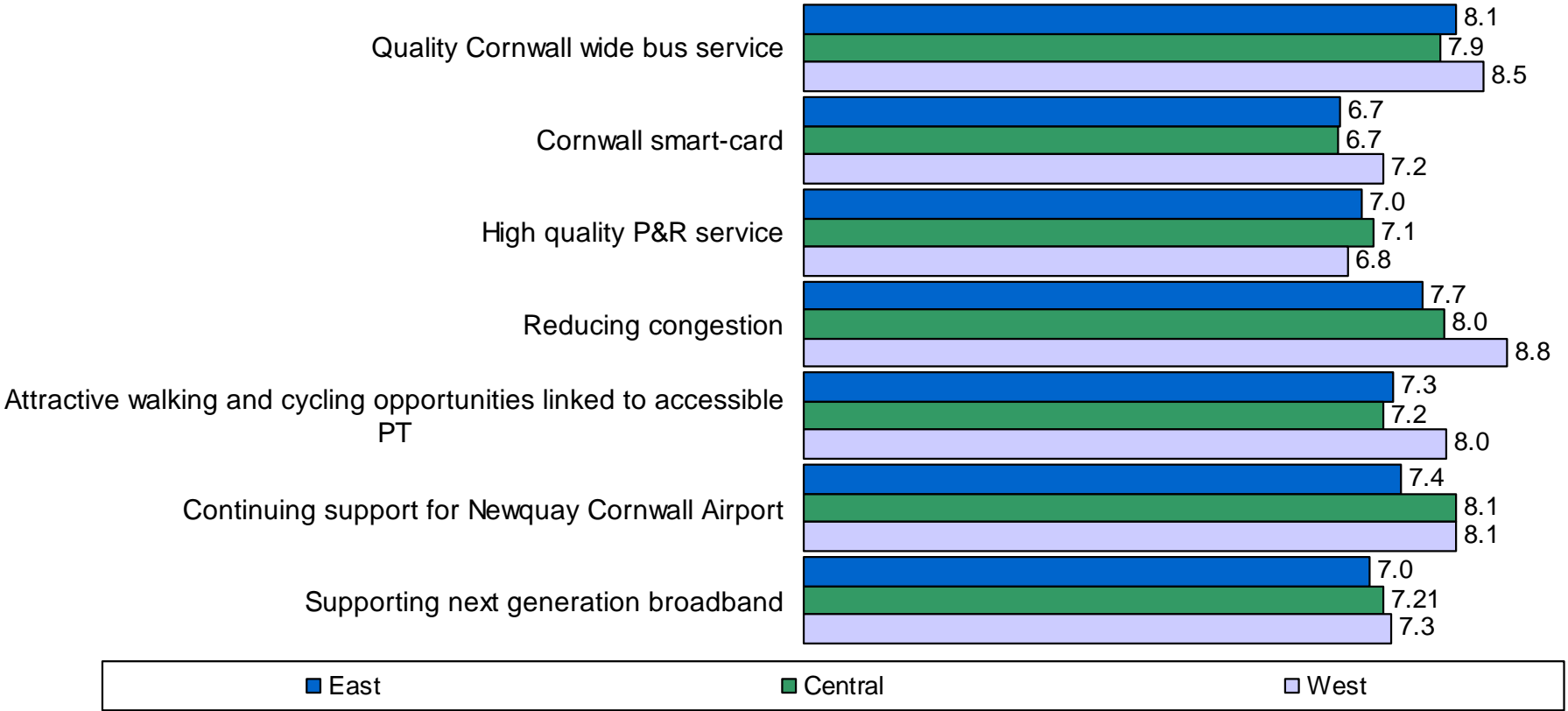
Rating of the 'other' SUPPORTING ECONOMIC PROSPERITY proposals

- The majority of the additional proposals tested amongst online/postal respondents were also deemed 'quite' important – notably the proposals regarding railways / rail transport and improving journey time reliability (linked to congestion in the focus groups).



Rating of the SUPPORTING ECONOMIC PROSPERITY proposals (e.g. by Area)

- This example shows a consistent pattern evident at not only the Goal stage – but also throughout the rating of proposals – significantly higher ratings by the West and lower by the East – may be indicative often of desire rather than need?

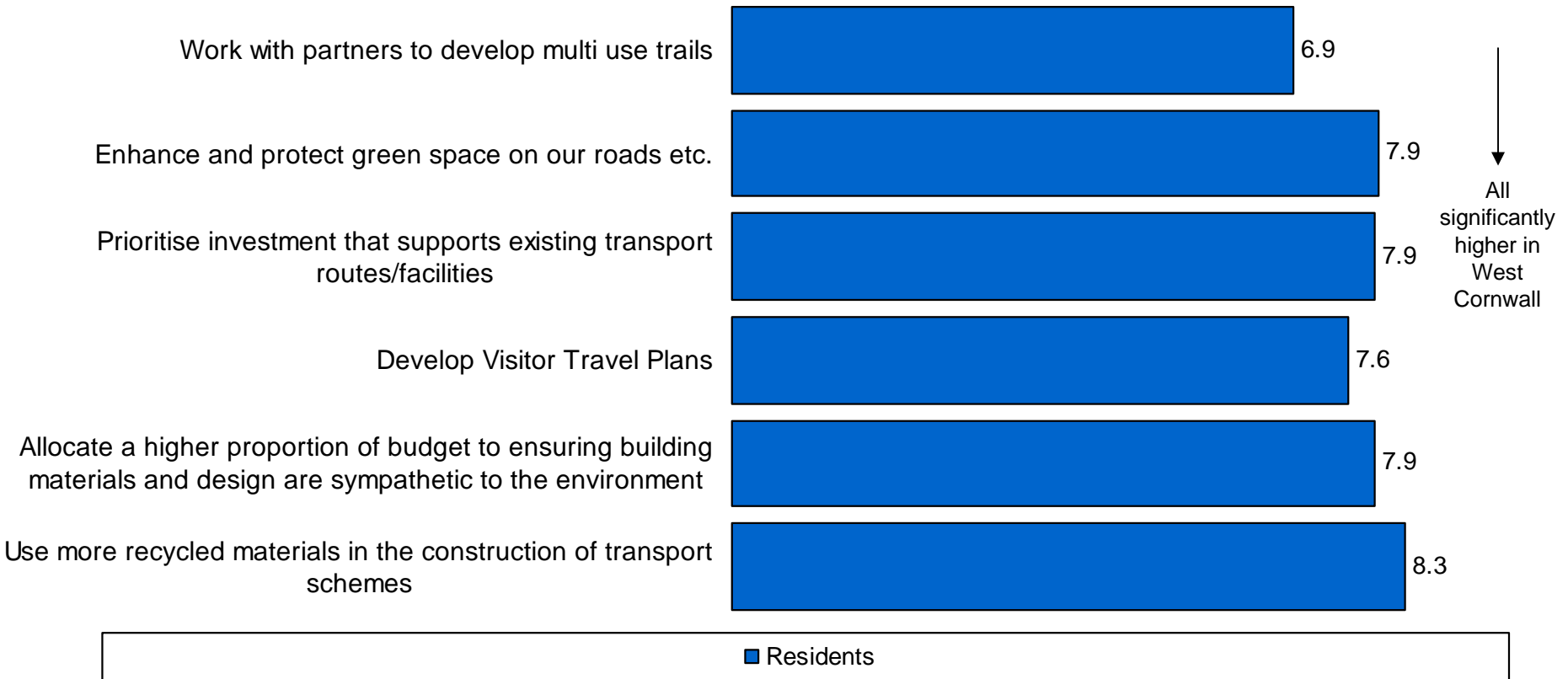




Rating the importance of Respecting and enhancing the environment proposals

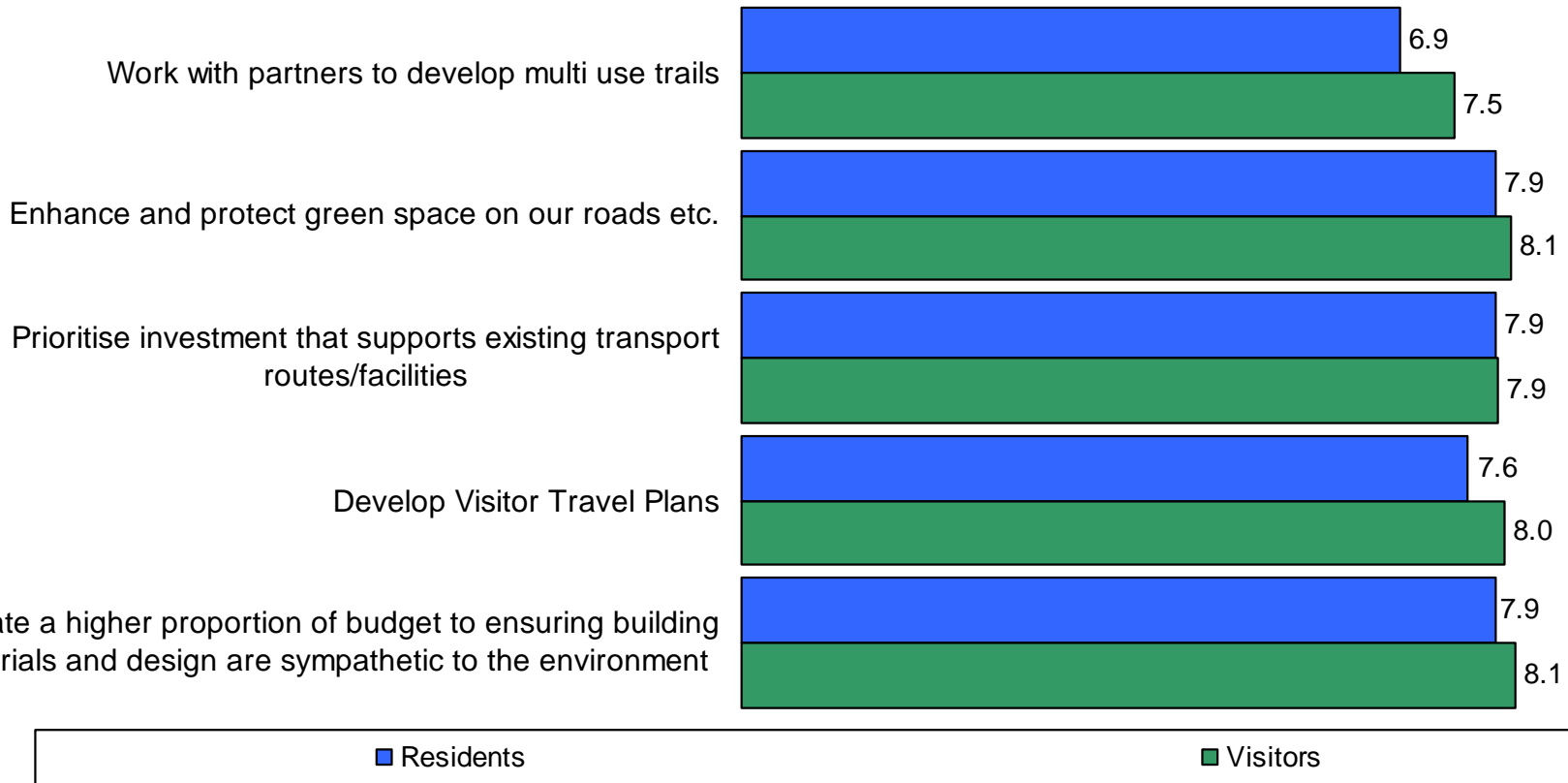
Rating of the RESPECT AND ENHANCE THE ENVIRONMENT proposals

- As with other proposals related to walking/cycling – multi use trails was considerably less important and of more interest to specific ‘groups’. The other proposals were of notably high levels of importance – especially the use of recycled materials (receiving little comment in focus groups).



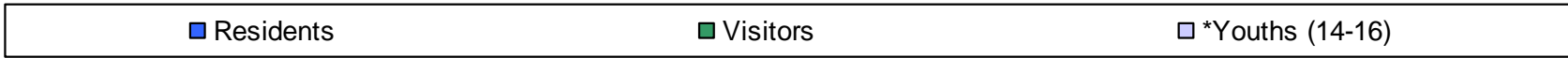
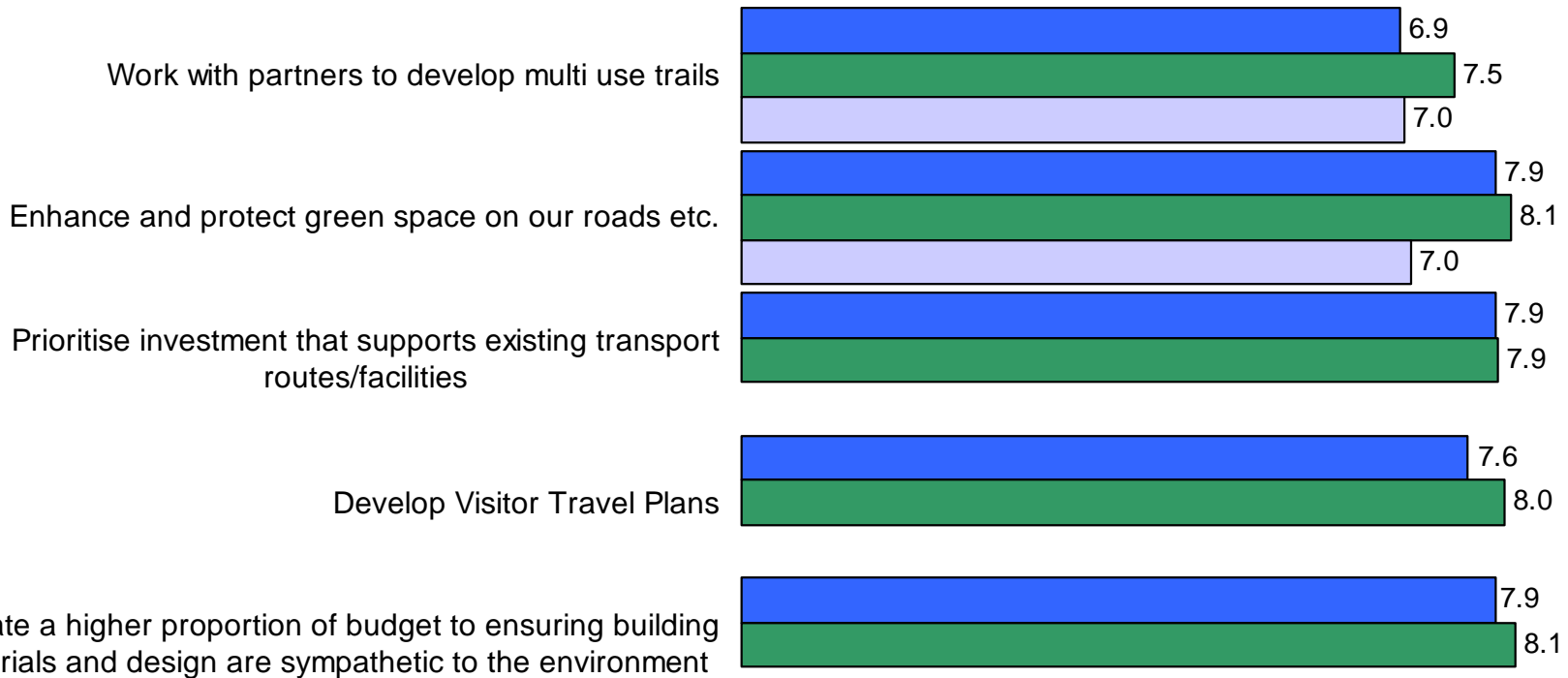
Rating of the RESPECT AND ENHANCE THE ENVIRONMENT proposals

- In all cases – with the exception of supporting existing transport routes – visitor ratings of importance were higher (consistent with the focus groups – ‘you need to do this – this is why we come to Cornwall’). Visitor Travel Plans receiving positive ratings as per focus groups also.



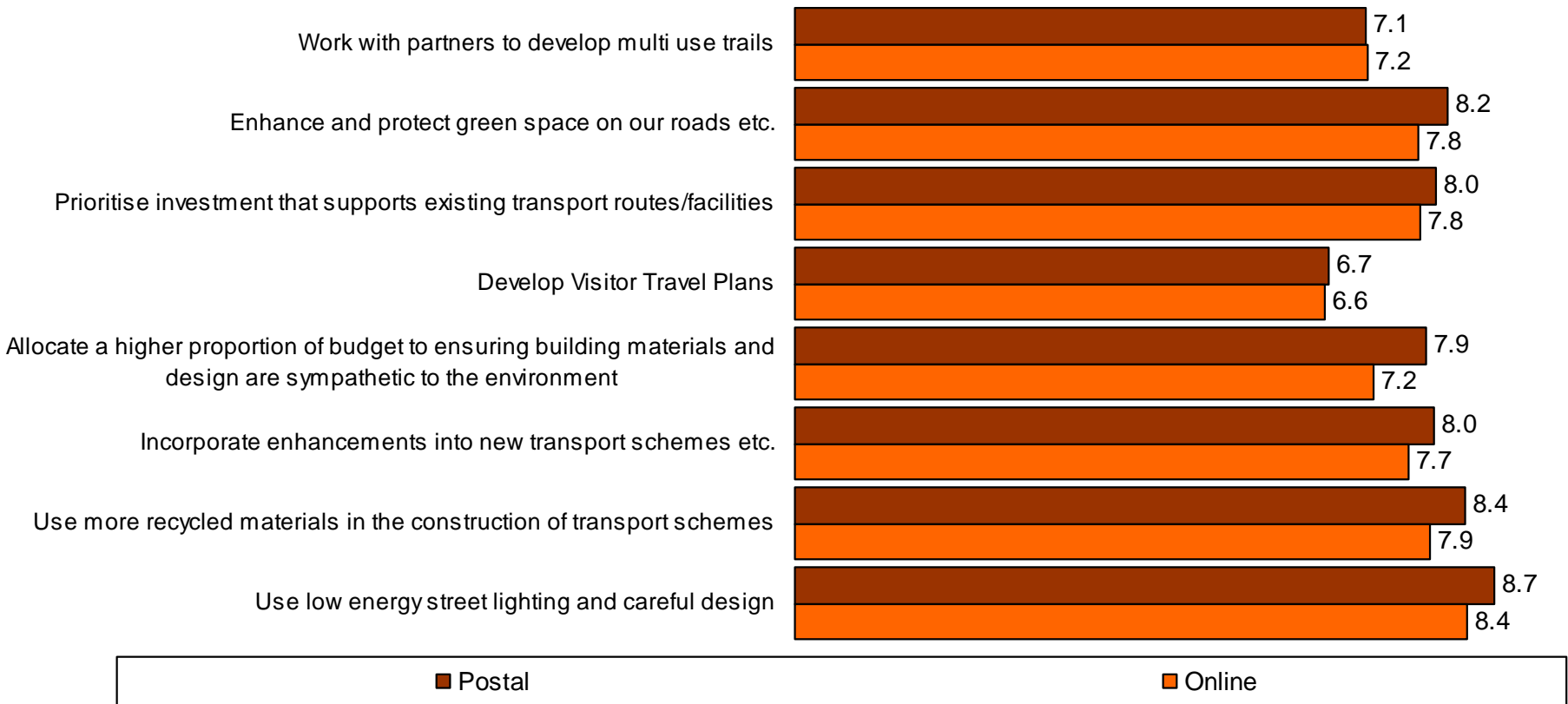
Rating of the RESPECT AND ENHANCE THE ENVIRONMENT proposals

- Whilst youths still deemed the first two proposals as 'quite' important – ratings were muted compared with other groups – youth ratings higher for those aspects regarding PT and 'getting around'.



Rating of the RESPECT AND ENHANCE THE ENVIRONMENT proposals

- All responses are markedly consistent with those of residents/visitors with the notable exception of a significantly lower rating for Visitor Travel Plans. Importantly low energy street lighting was rated 'the' most important proposal amongst postal/online respondents.





Rating the importance of Healthy active lifestyles proposals

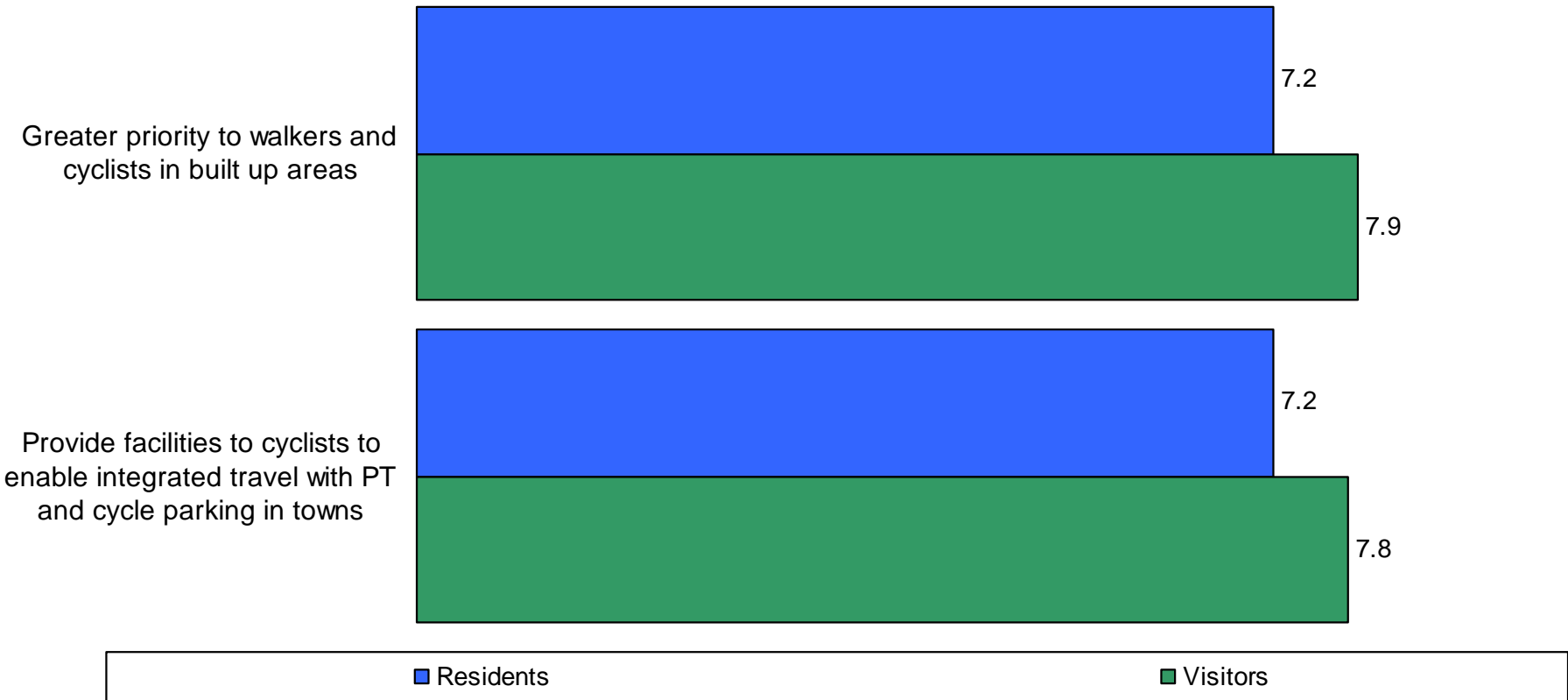
Rating of the HEALTHY ACTIVE LIFESTYLES proposals

- Perhaps a 'top of mind' rational response – lowering speed limits outside of schools was deemed to be 'very important' (one of only three in the consultation) – with School Travel Plans also being deemed as higher than 'quite' importance.



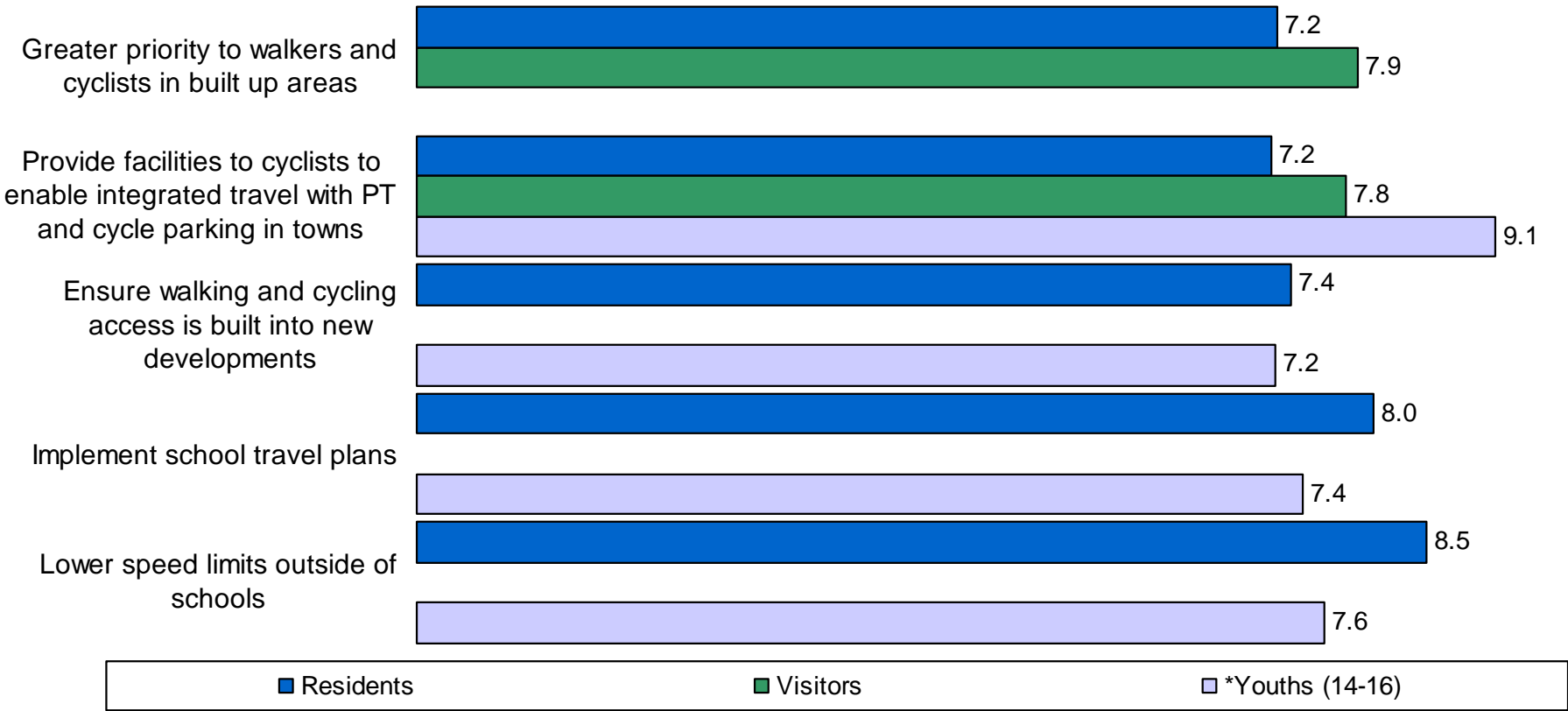
Rating of the HEALTHY ACTIVE LIFESTYLES proposals

- Although demonstrating little evidence of actually cycling when visiting Cornwall – in either the travel habits survey or the focus groups – high ratings for the first proposal undoubtedly are to do with ‘walking’ (reference problems of no pavements etc. in the travel habits survey).



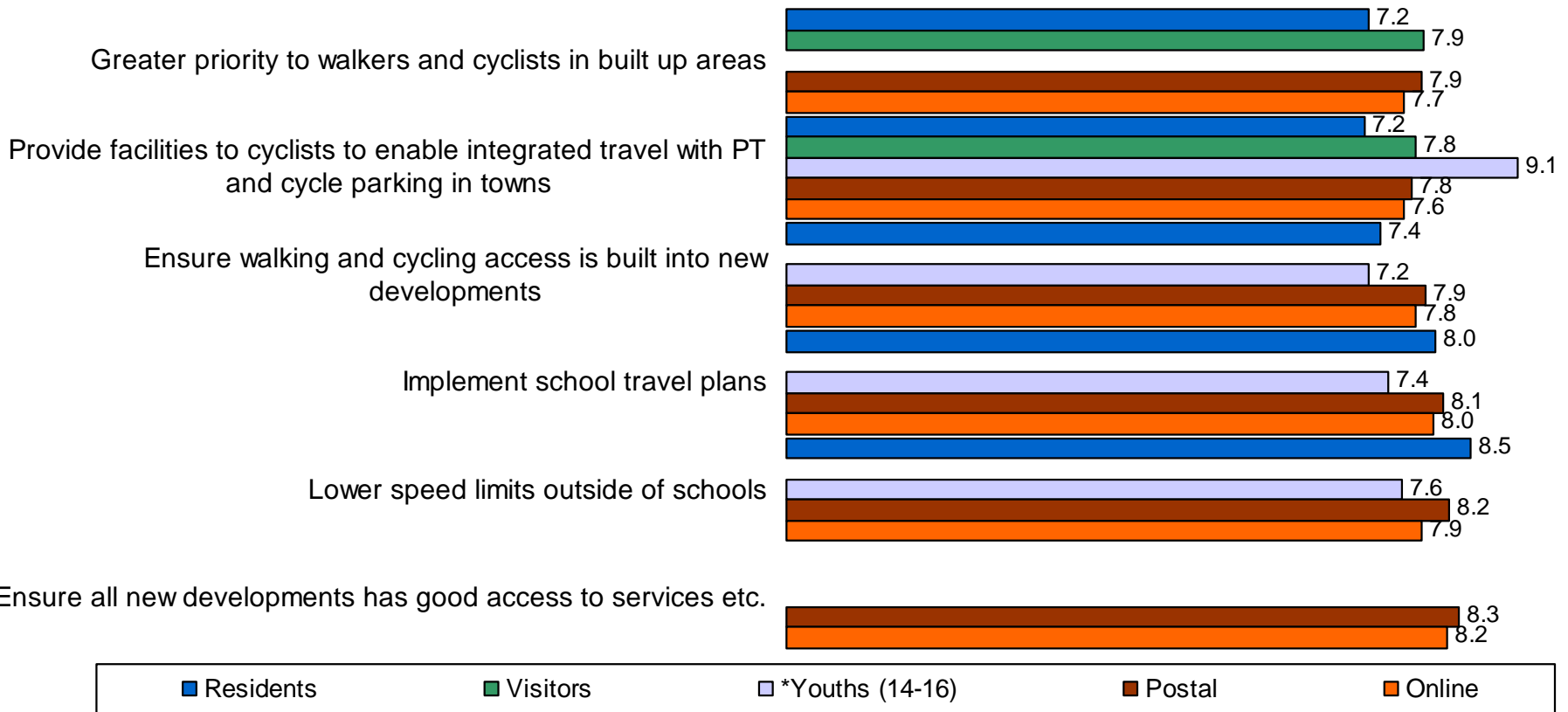
Rating of the HEALTHY ACTIVE LIFESTYLES proposals

- The 'very' important rating provided by youths was for 'making it easier for people who wish to combine a cycle ride with Public Transport' – linking to their desire for better 'connected' travel.



Rating of the HEALTHY ACTIVE LIFESTYLES proposals

- Postal/online responses are akin to those of visitors and residents – but notably the new development having good access to services was deemed most important by these groups – alongside school speed limits (universal).

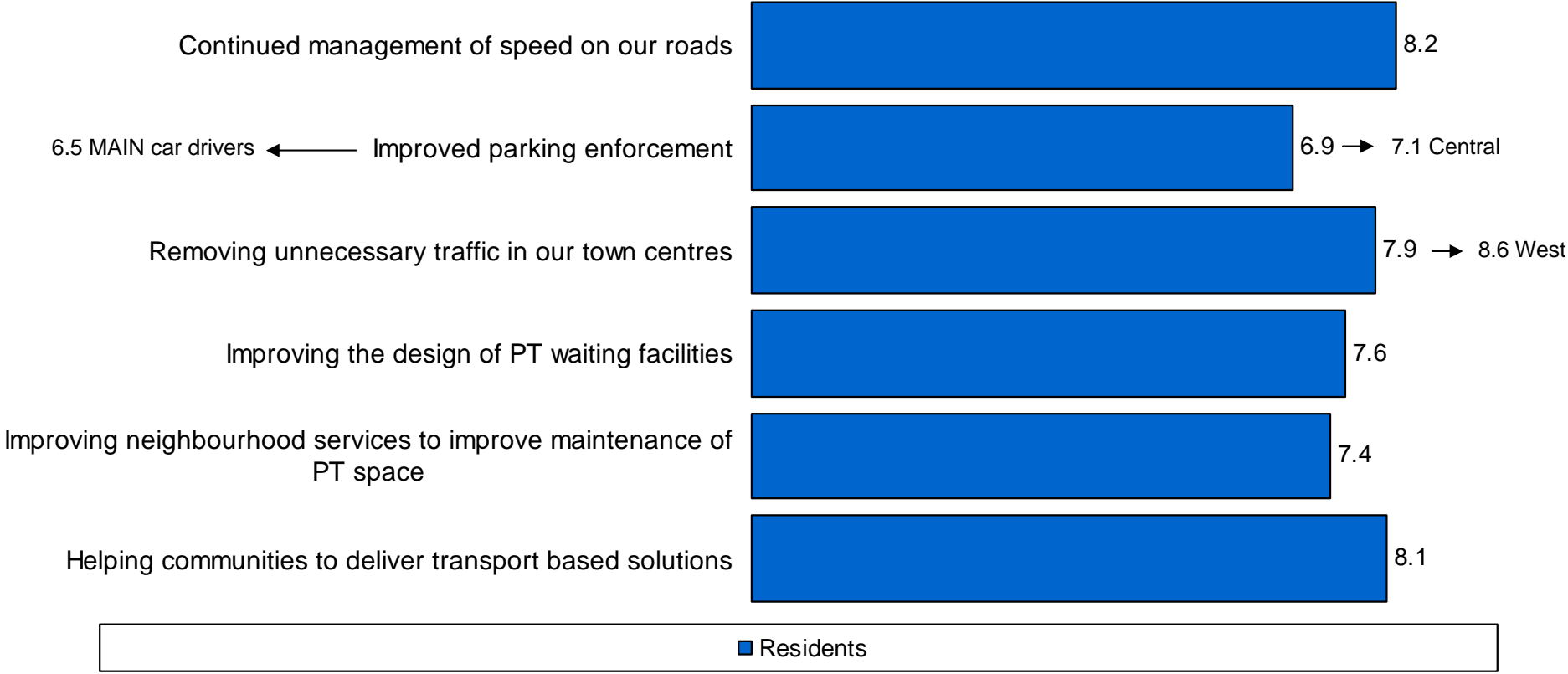




Rating the importance of Community Safety and Individual well- being proposals

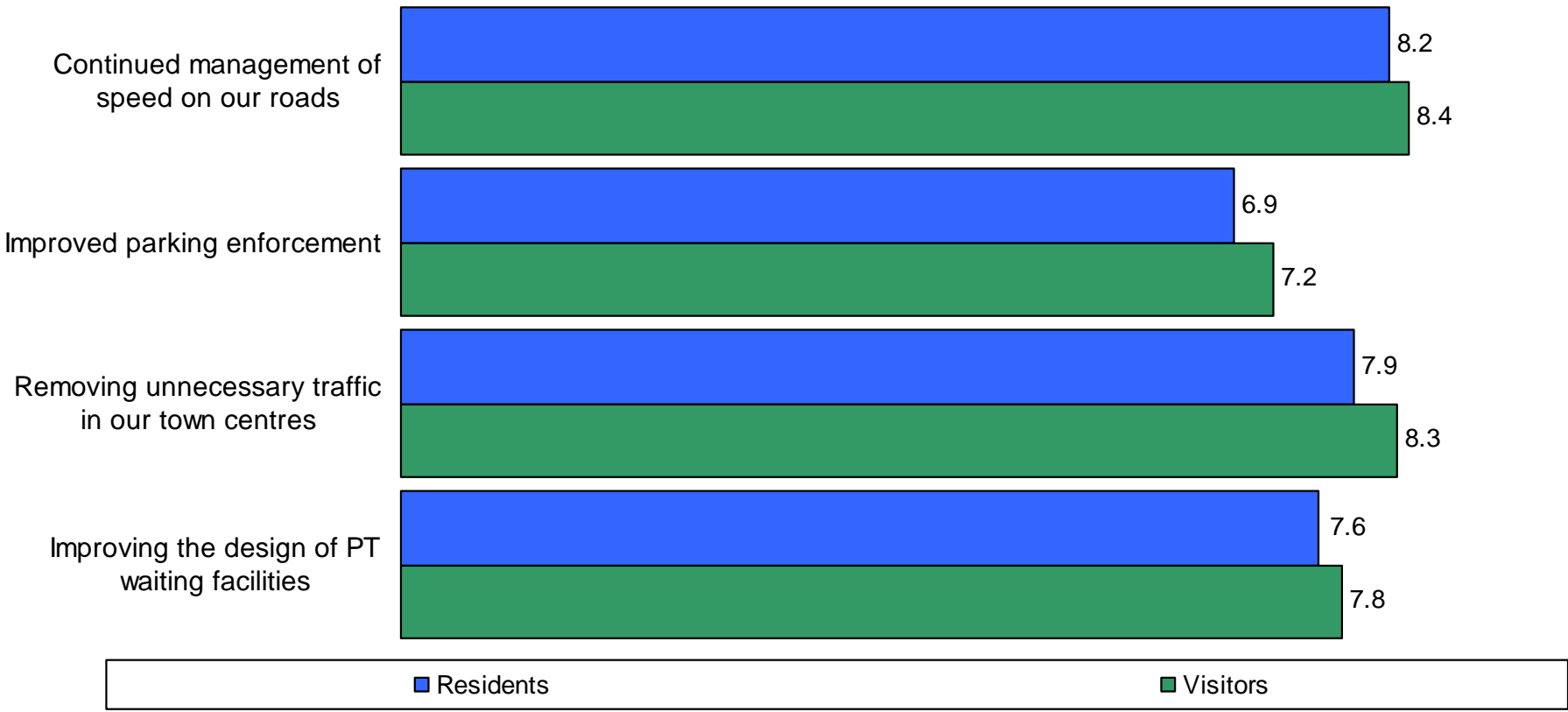
Rating of the COMMUNITY SAFETY AND INDIVIDUAL WELL-BEING proposals

- The priority importance of ‘continued management of speed on our roads’ is consistent with the qualitative research however perhaps due to the inclusion of more rural communities in this research – community based transport solution is deemed ‘as’ important.



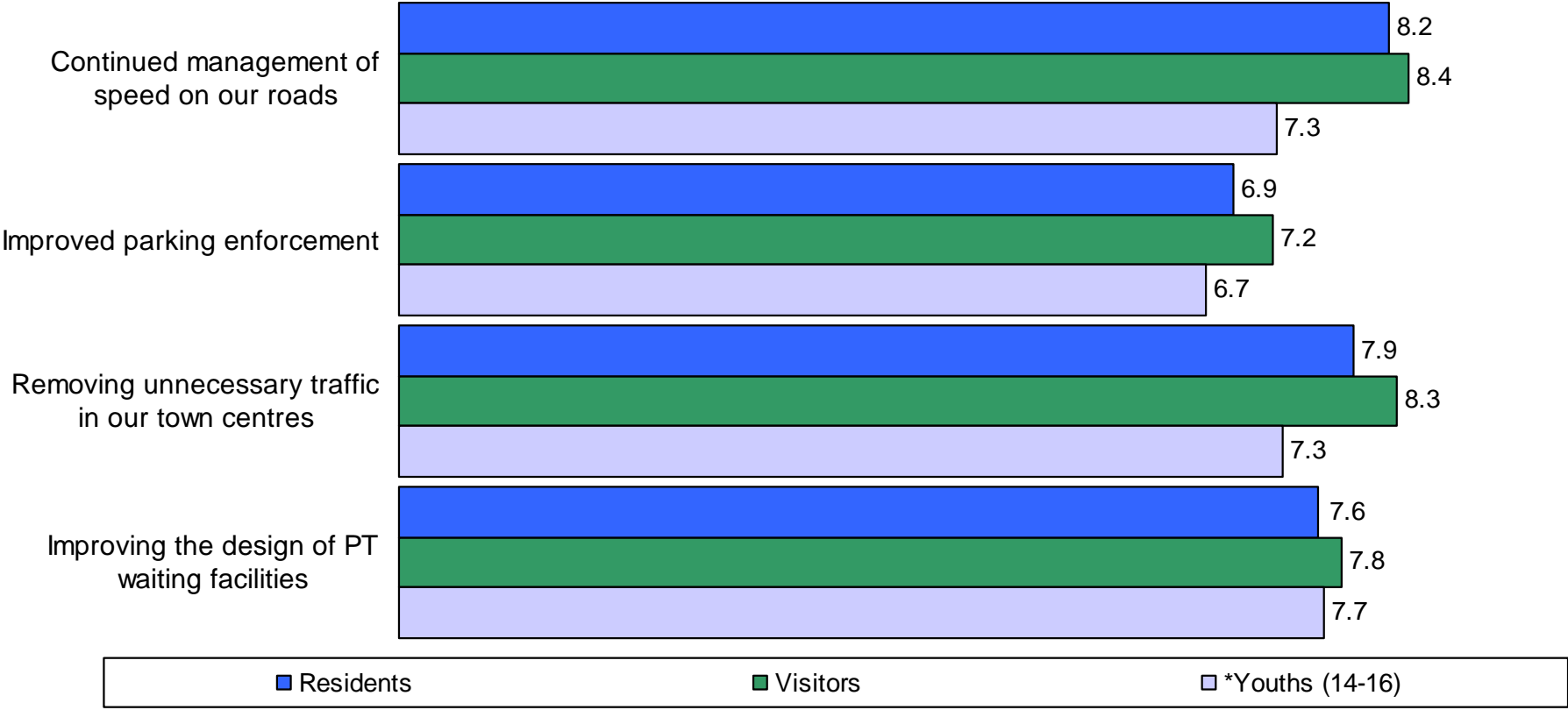
Rating of the COMMUNITY SAFETY AND INDIVIDUAL WELL-BEING proposals

- Findings completely consistent with focus groups – equal importance attributed to speed management but more emphasis on parking/unnecessary traffic from visitors which have greater exposure to these problems.



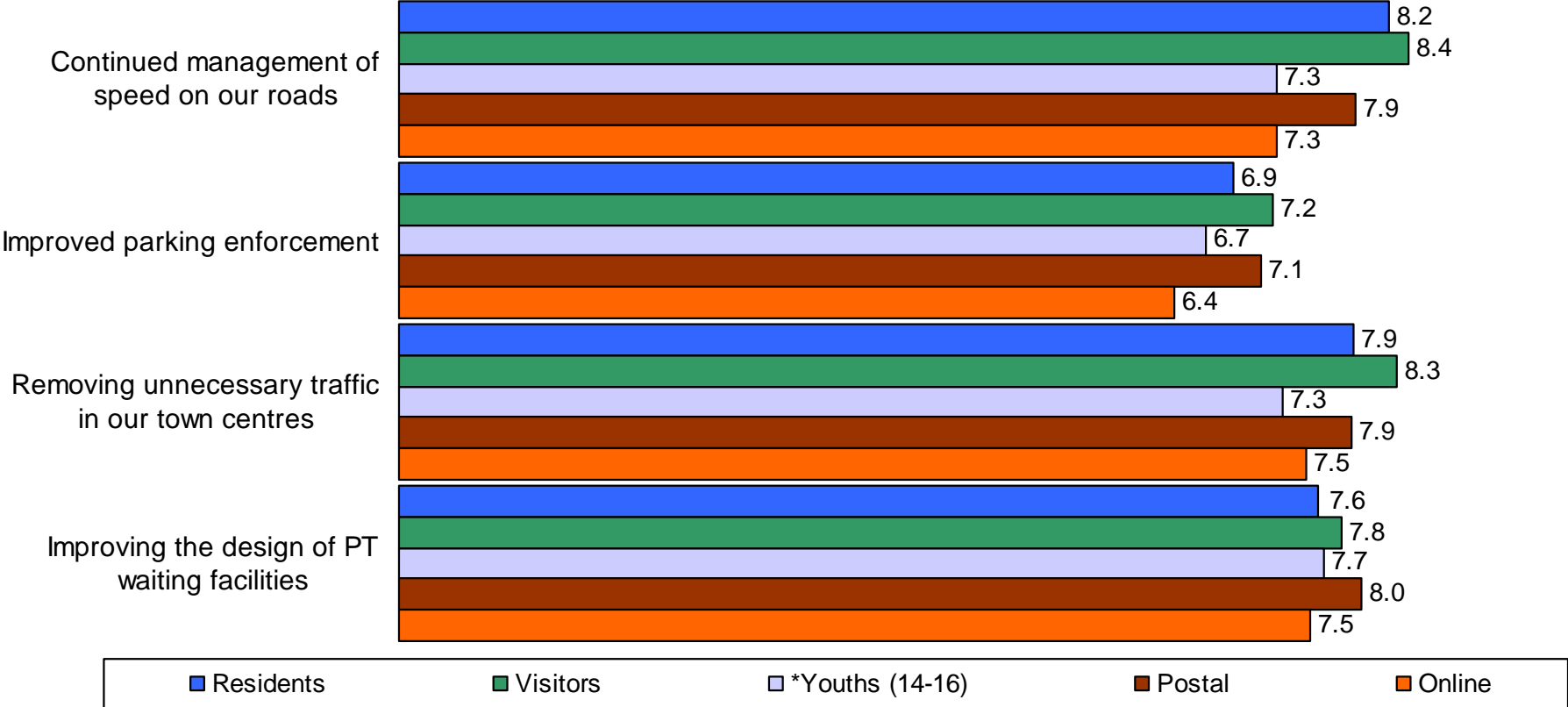
Rating of the COMMUNITY SAFETY AND INDIVIDUAL WELL-BEING proposals

- Issues perceived as associated with 'car' travel were of less important to youths – although the importance of the improvement of PT waiting facilities was 'as' important as to the other groups.



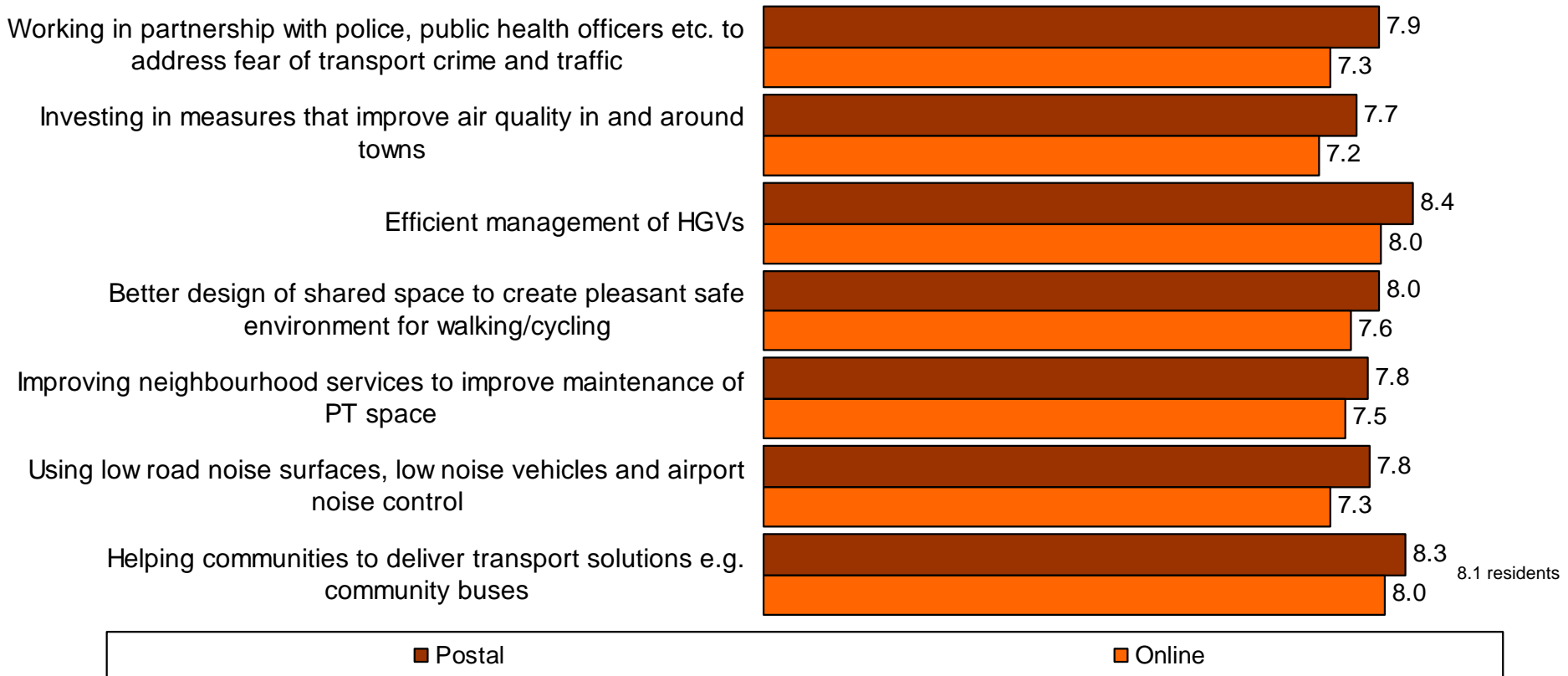
Rating of the COMMUNITY SAFETY AND INDIVIDUAL WELL-BEING proposals

- Postal responses differed to face-to-face surveys giving priority importance to the improvement of PT waiting facilities over the speed management proposal – with significantly lower ratings for all proposals by online respondents.



Rating of the ‘other’ COMMUNITY SAFETY AND INDIVIDUAL WELL-BEING proposals

- Although community services also received high levels of attributed importance – as it did from residents – the most important proposal to postal respondents was the management of HGV traffic – not deemed to be a ‘major’ issue when investigated in the qualitative research.

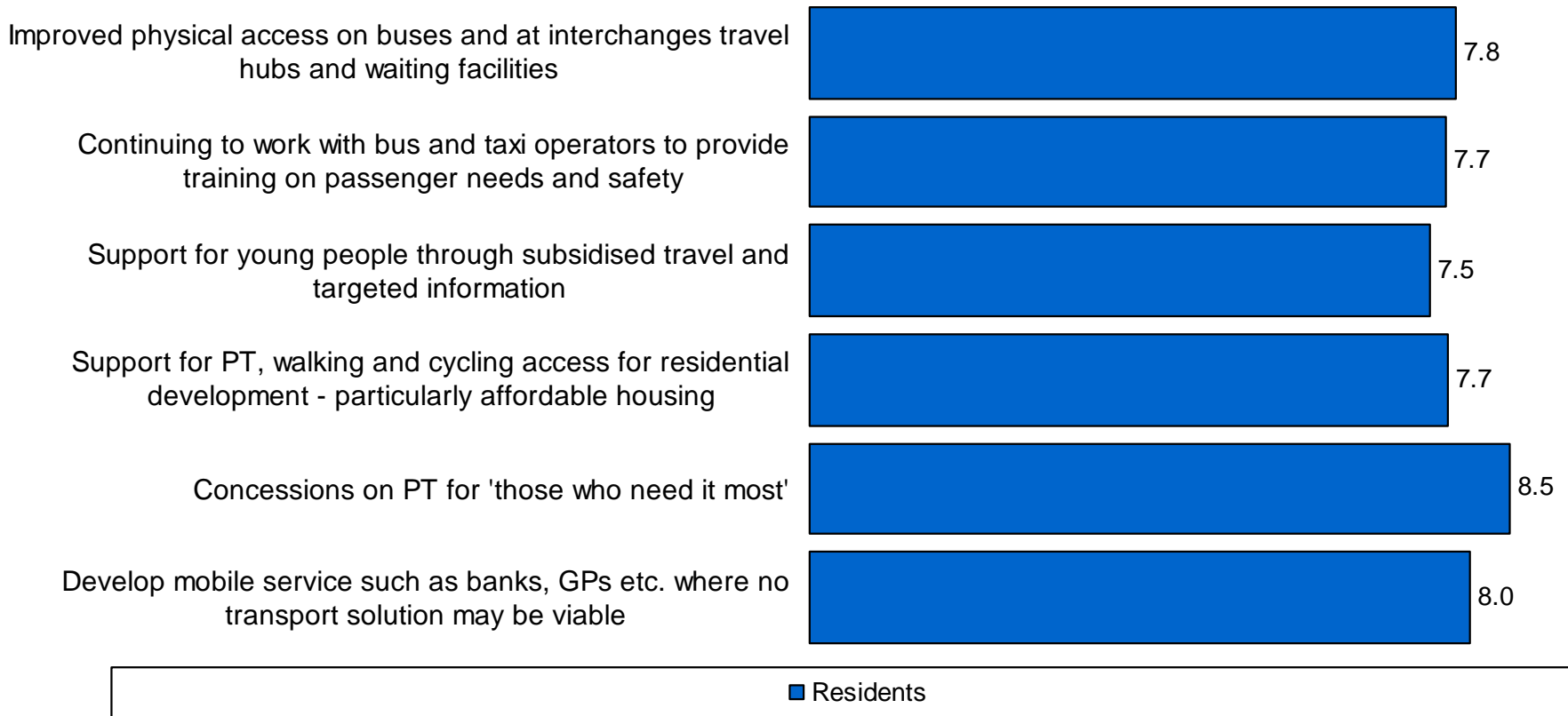




Rating the importance of Equality of opportunity proposals

Rating of the EQUALITY OF OPPORTUNITY proposals

- Concessionary travel on PT for those who need it most is only one of three proposals to be deemed 'very important' – and as per groups, more important than 'just' for young people. Also of note is the increased importance (from the groups) of community/rural service solutions.



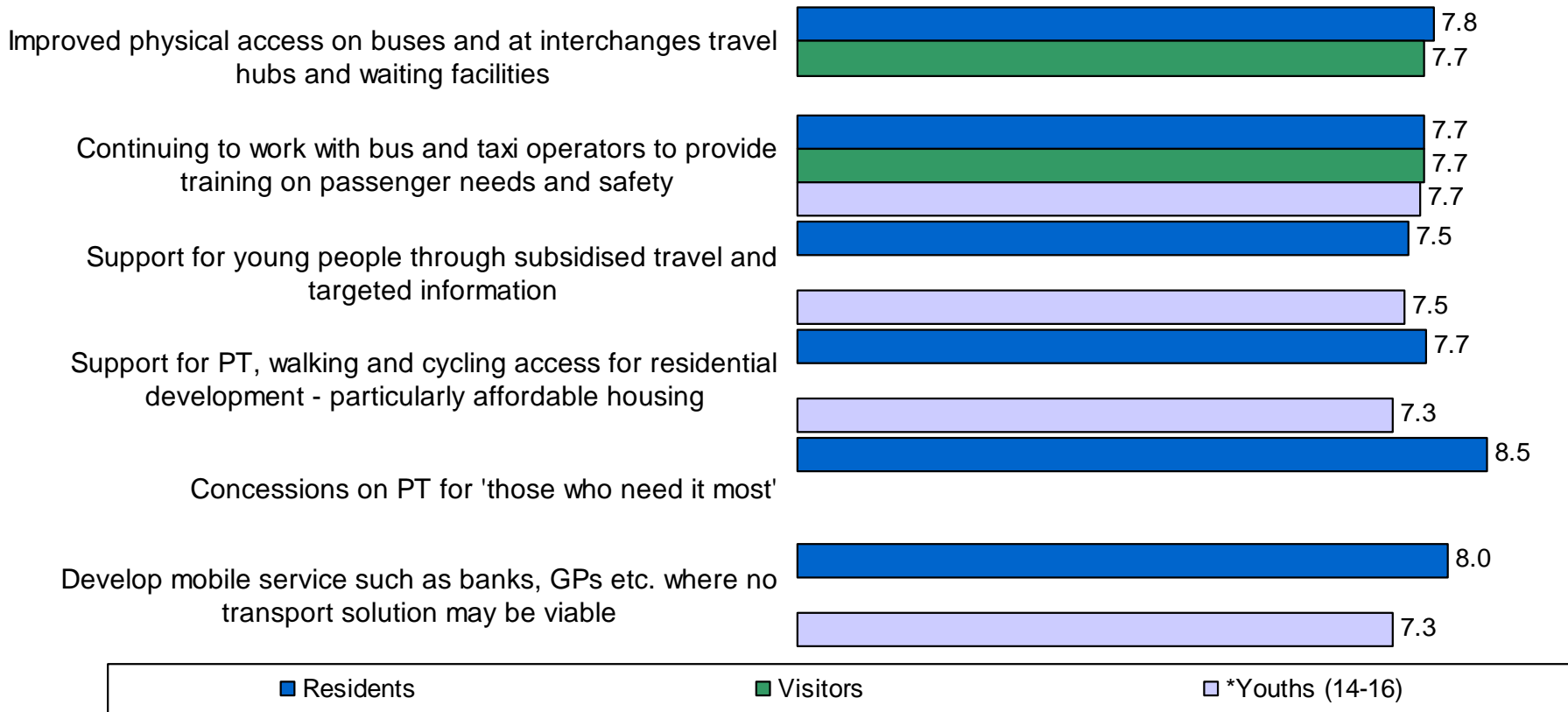
Rating of the EQUALITY OF OPPORTUNITY proposals

- The importance of each of the two proposals put to visitors is consistent with that of residents.



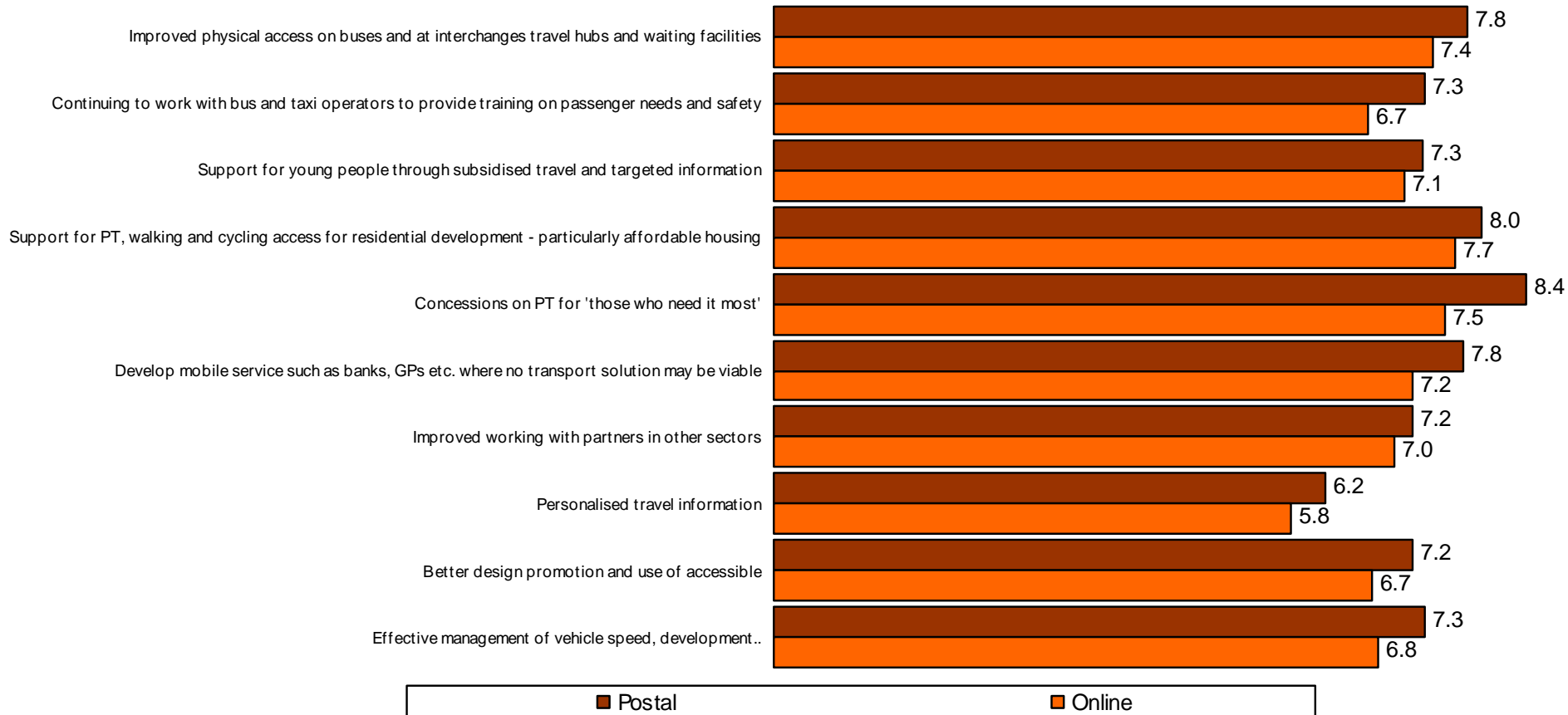
Rating of the EQUALITY OF OPPORTUNITY proposals

- With the exception of mobile services and affordable housing – youth opinion is also consistent with that of adult residents.



Rating of the EQUALITY OF OPPORTUNITY proposals

- Concessions for those who need it most remains of priority importance to the postal respondents also – again more muted response from online respondents – with the exception of support for young people.

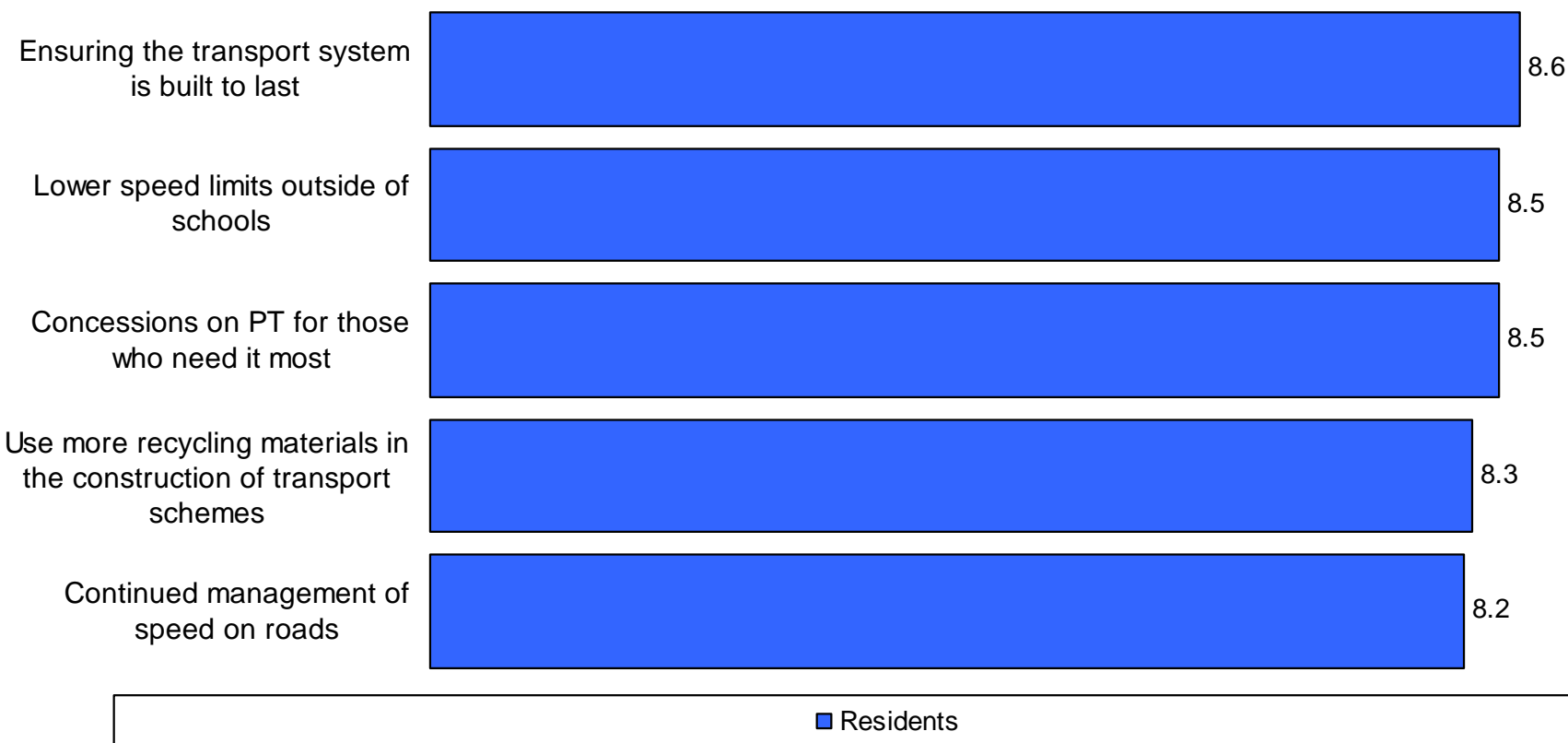




Top 5 proposals by 'type'

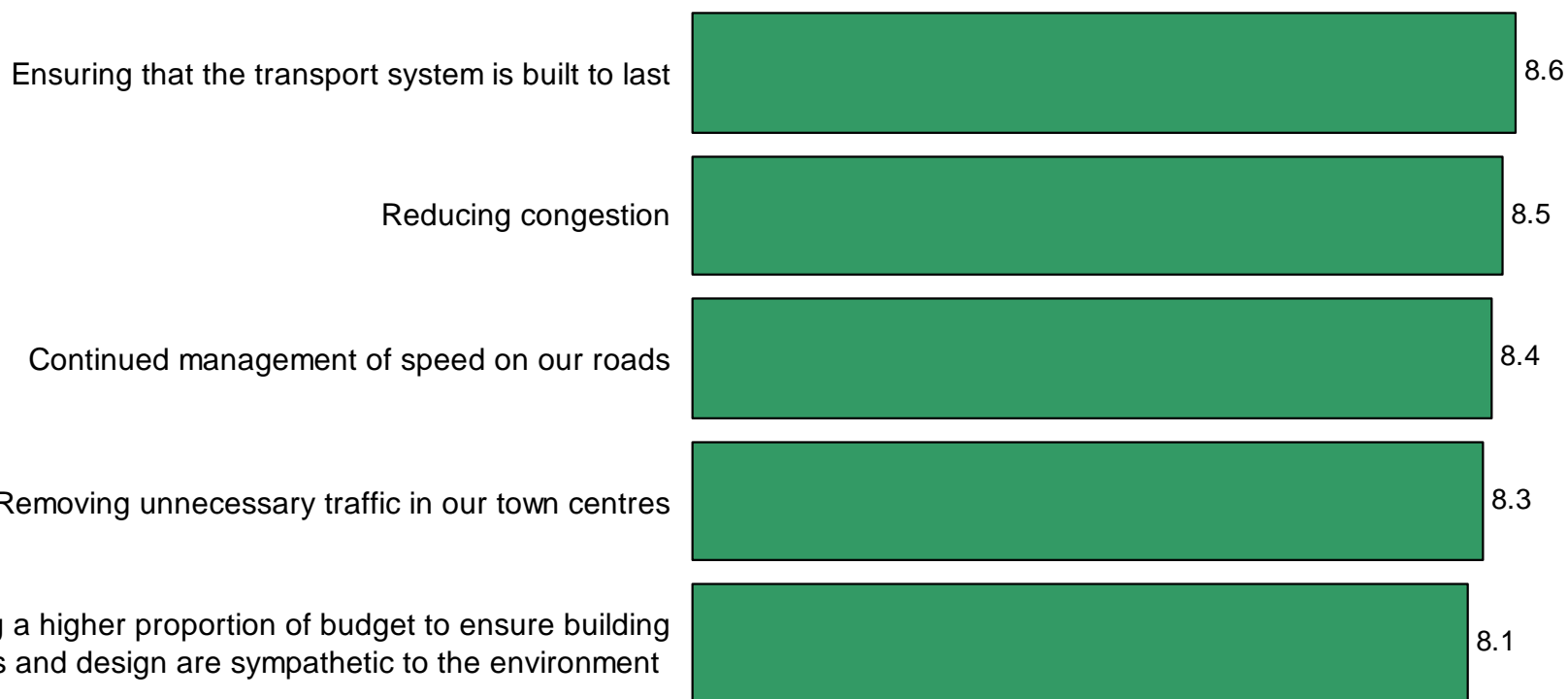
The top 5 proposals for residents

- The first and fourth priority proposals suggest a desire for longevity and better use of resources – whilst two are concerned with ‘speed’. Concessions is of universal importance – even amongst those which stated they would never use PT at the focus groups.



The top 5 proposals for visitors

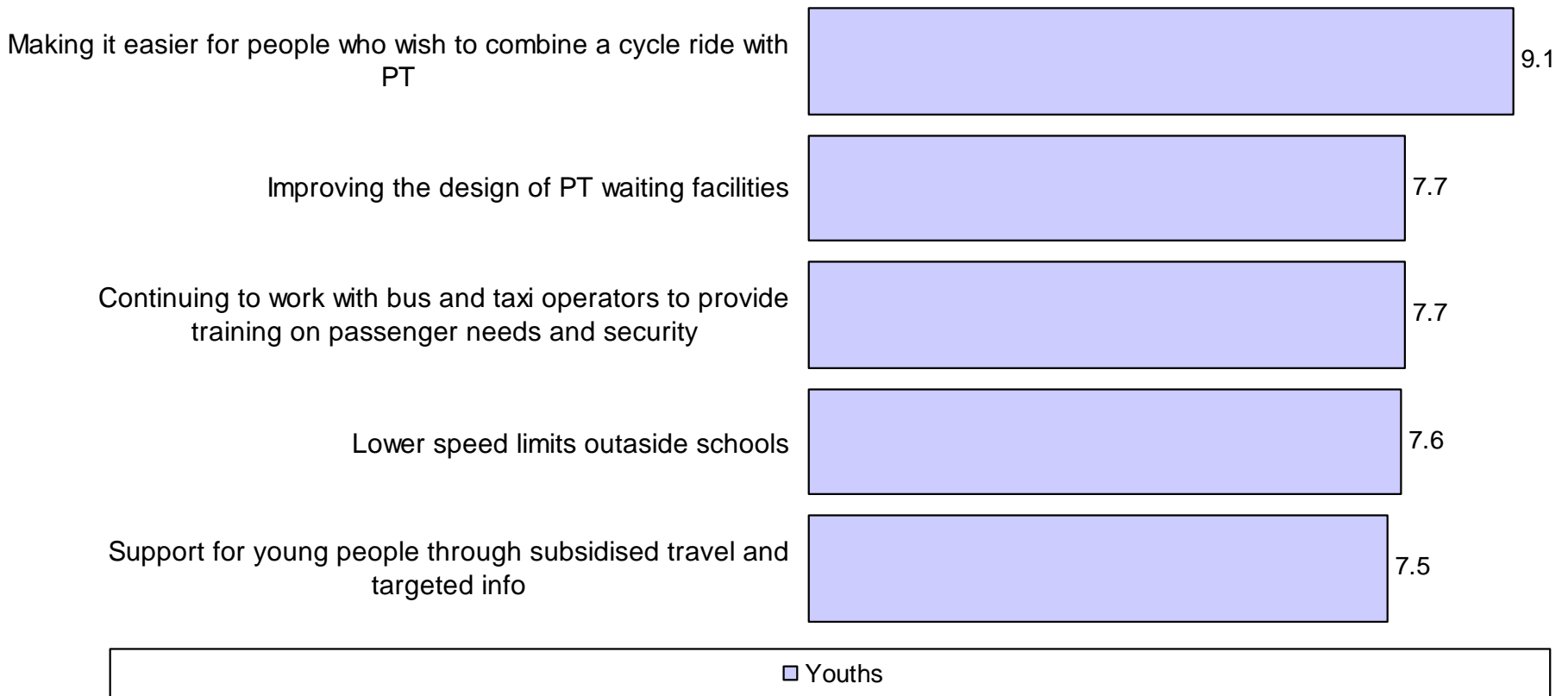
- Visitors and residents are alike in their stated importance of a transport system that is built to last and speed management. However visitors are also more (by admission) exposed to congestion and traffic problems hence their 2nd and 4th priority rankings.



■ Visitors

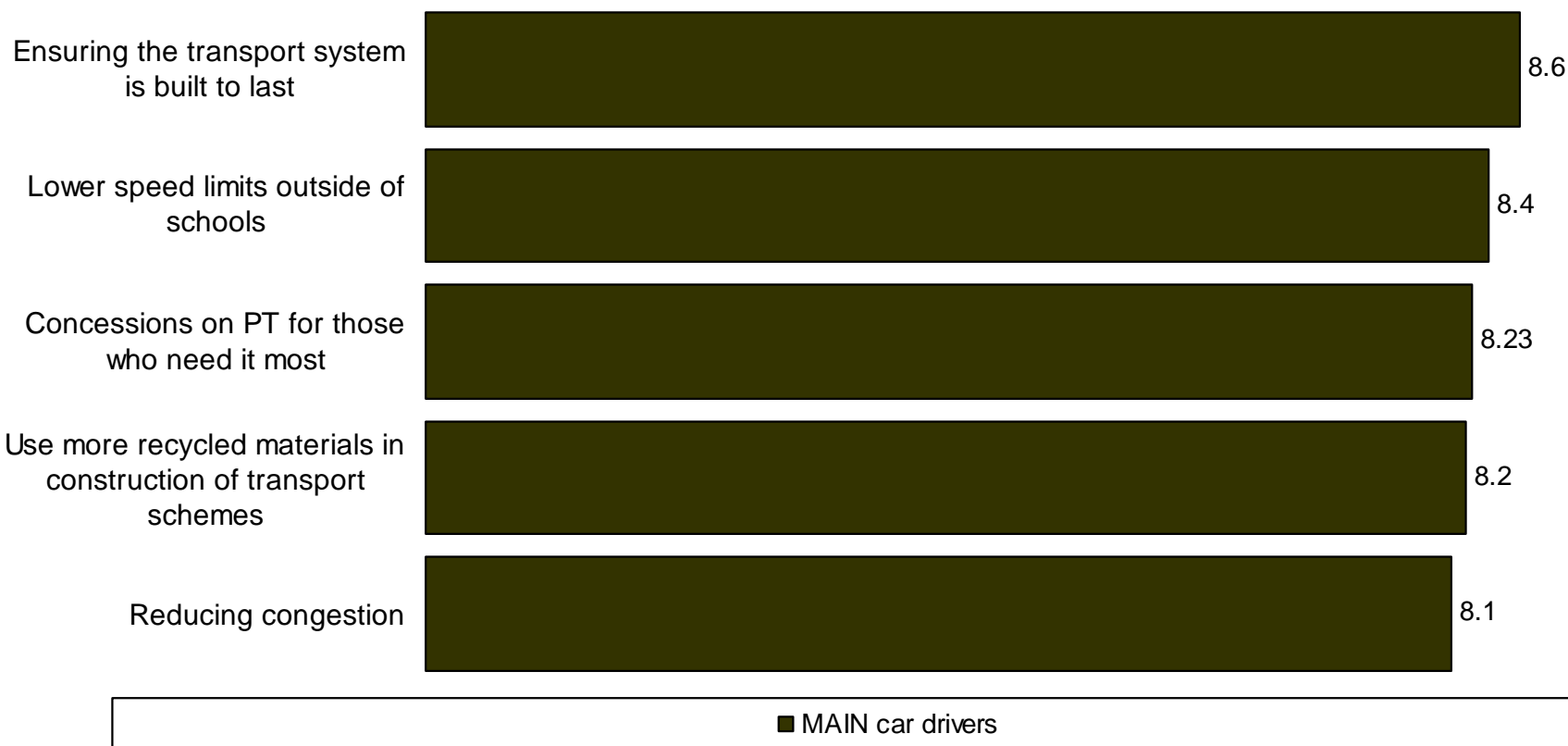
The top 5 proposals for youths

- Perhaps not surprisingly all of the priority proposals stated by youths are for their direct benefit and relate to their 'actual' transport needs (and behaviours) i.e. PT and school.



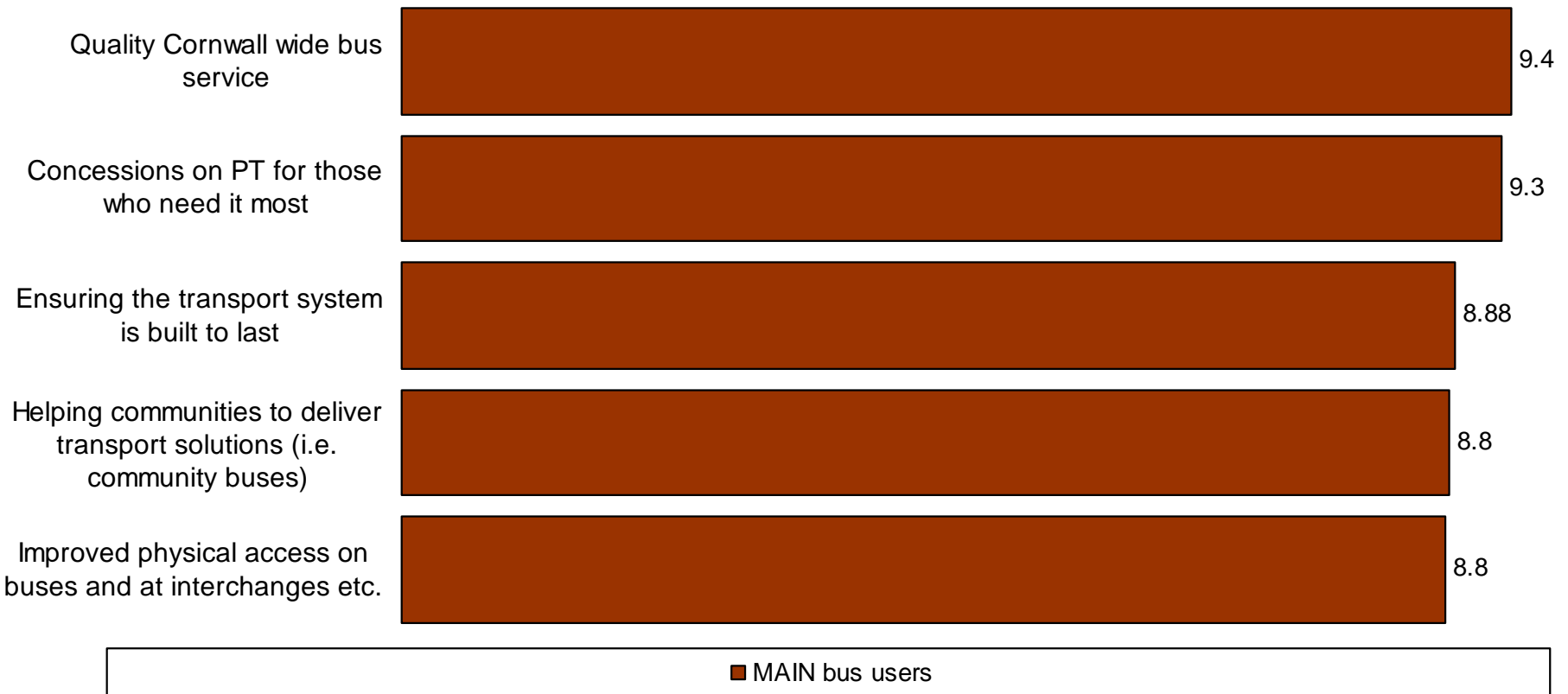
The top 5 proposals for MAIN car drivers

- With the exception of reducing congestion – the priorities of car drivers are the same as those of all residents. It is worth noting – consistent with qualitative research – that the 6th priority for car drivers was ‘Implement School Travel Plans’ (to reduce impact of the ‘School Run’ – rated 8.0).



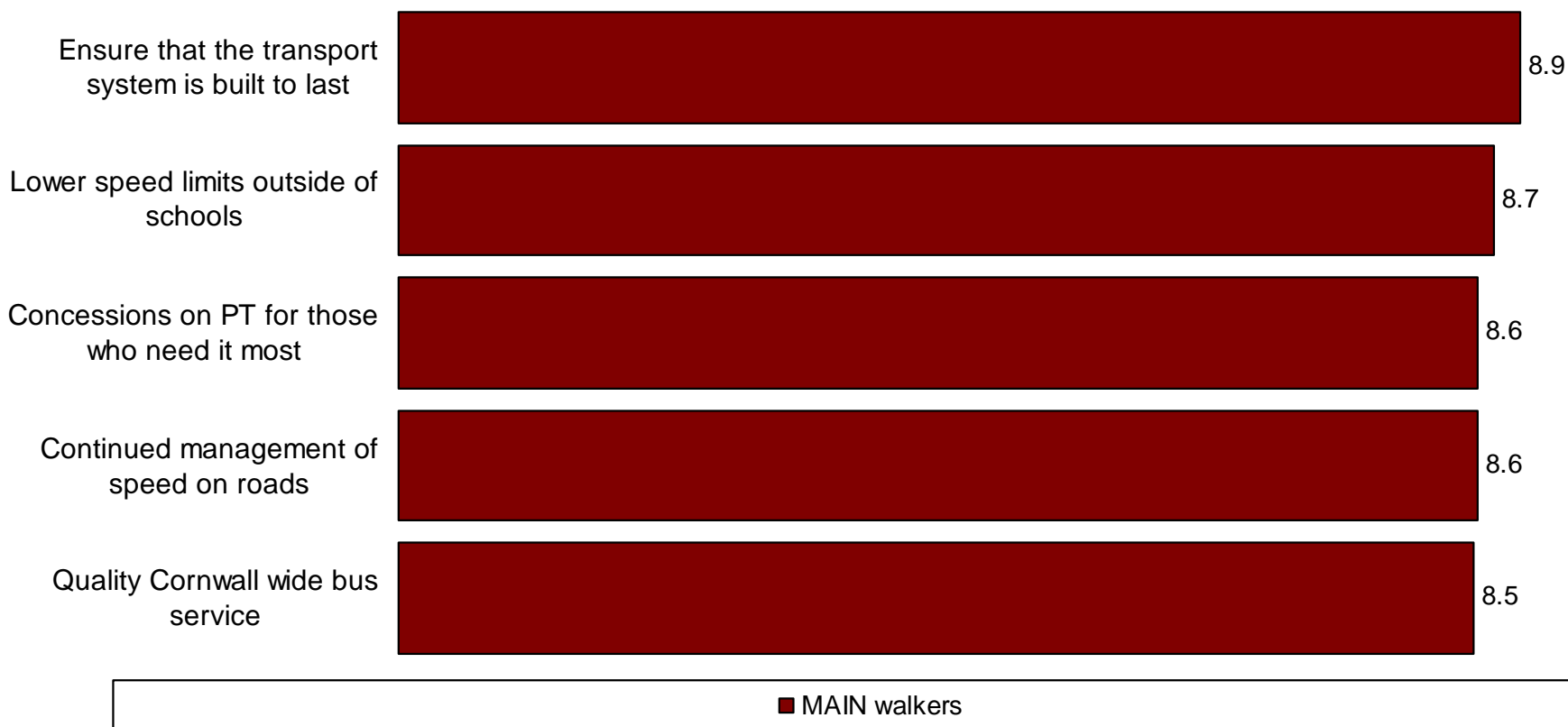
The top 5 proposals for MAIN bus users

- Collectively the top 5 ratings amongst MAIN bus users provides a higher average (need/desire) than for any other group – a mean of 9.05 – notably focusing on PT issues – note design of waiting facilities was rated 8.7.



The top 5 proposals for MAIN walkers

- Although one may have expected the cycling/walking proposals to have been ranked in the top 5 for walkers – they have prioritised the more holistic proposals typical to those of all residents – although speed management of course will be of benefit to pedestrians.

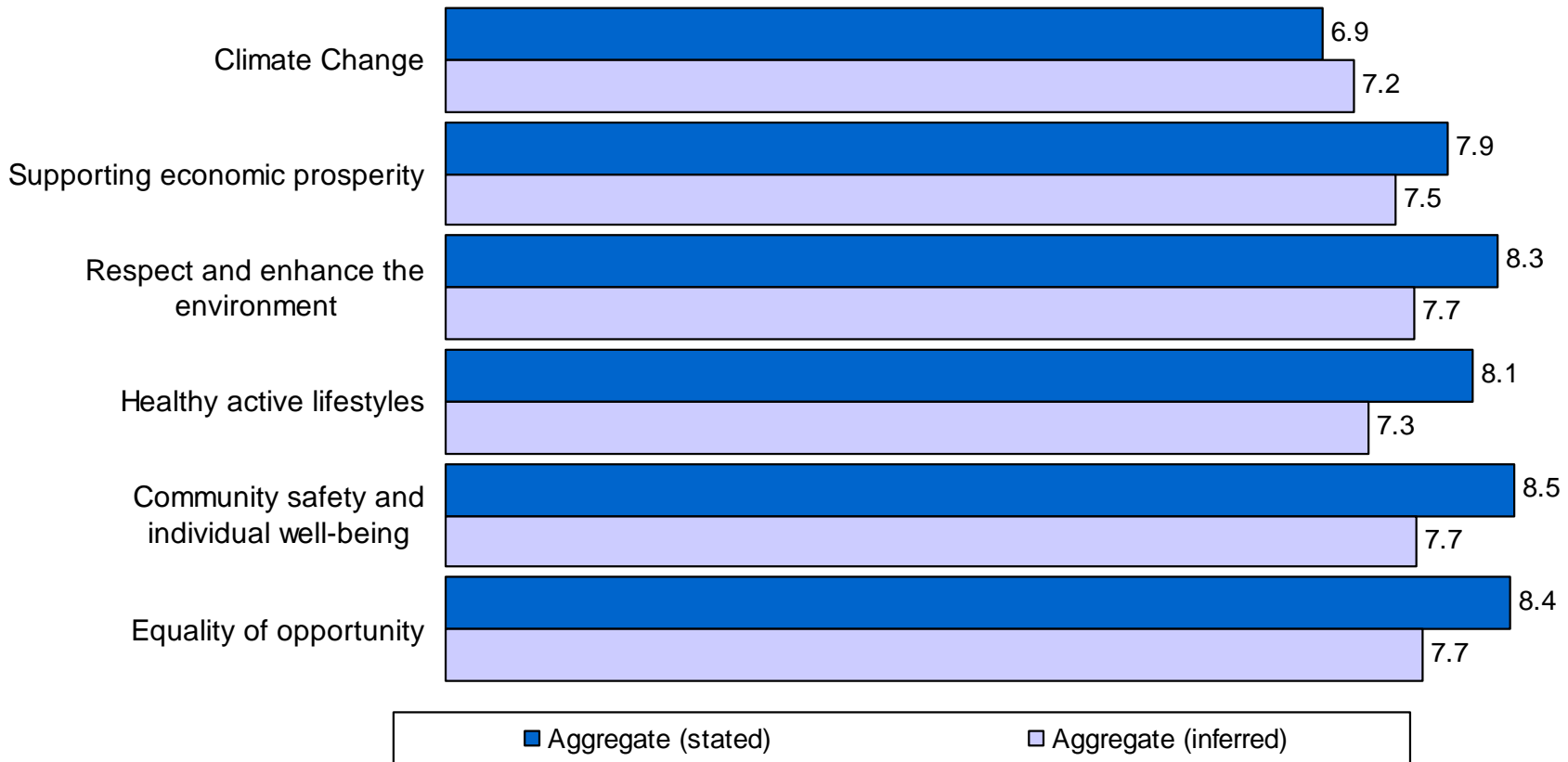




Rating the importance of the 6 'goals' – by inference (aggregate)

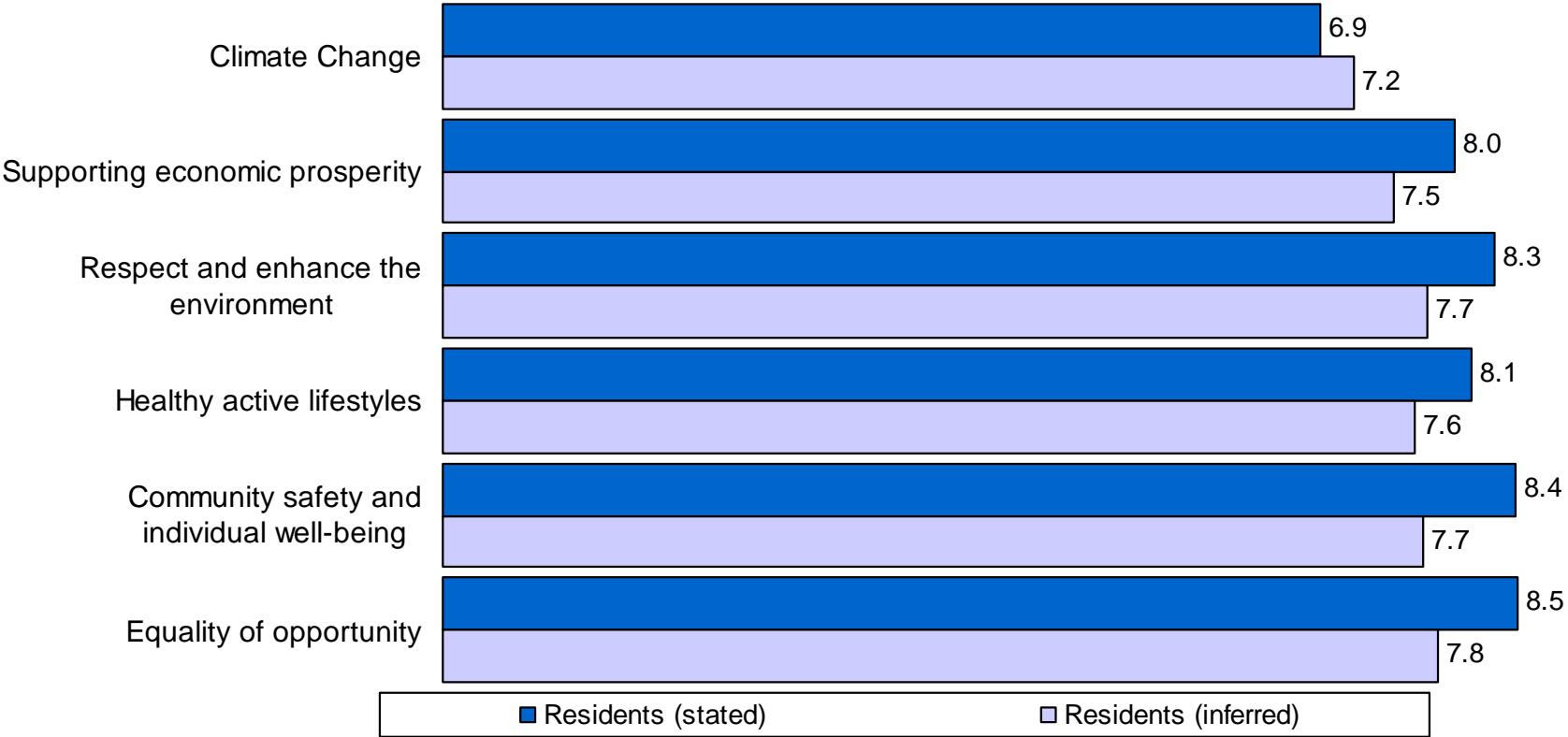
Importance of the 6 'goals' – an aggregation of proposal ratings

- If we aggregate all responses to proposals within each 'goal' to calculate an 'informed' mean score – consistent to the focus groups it is Climate Change that has grown in importance (largely due to 'ensuring transport system is built to last' – although it is still significantly the least important).



Importance of 6 'goals' – an aggregation of proposal ratings (e.g. for residents only)

- Consistently with residents – the informed knowledge of the proposals increases the importance of Climate Change – with 'equality of opportunity' being statistically the most important of all goals for residents.



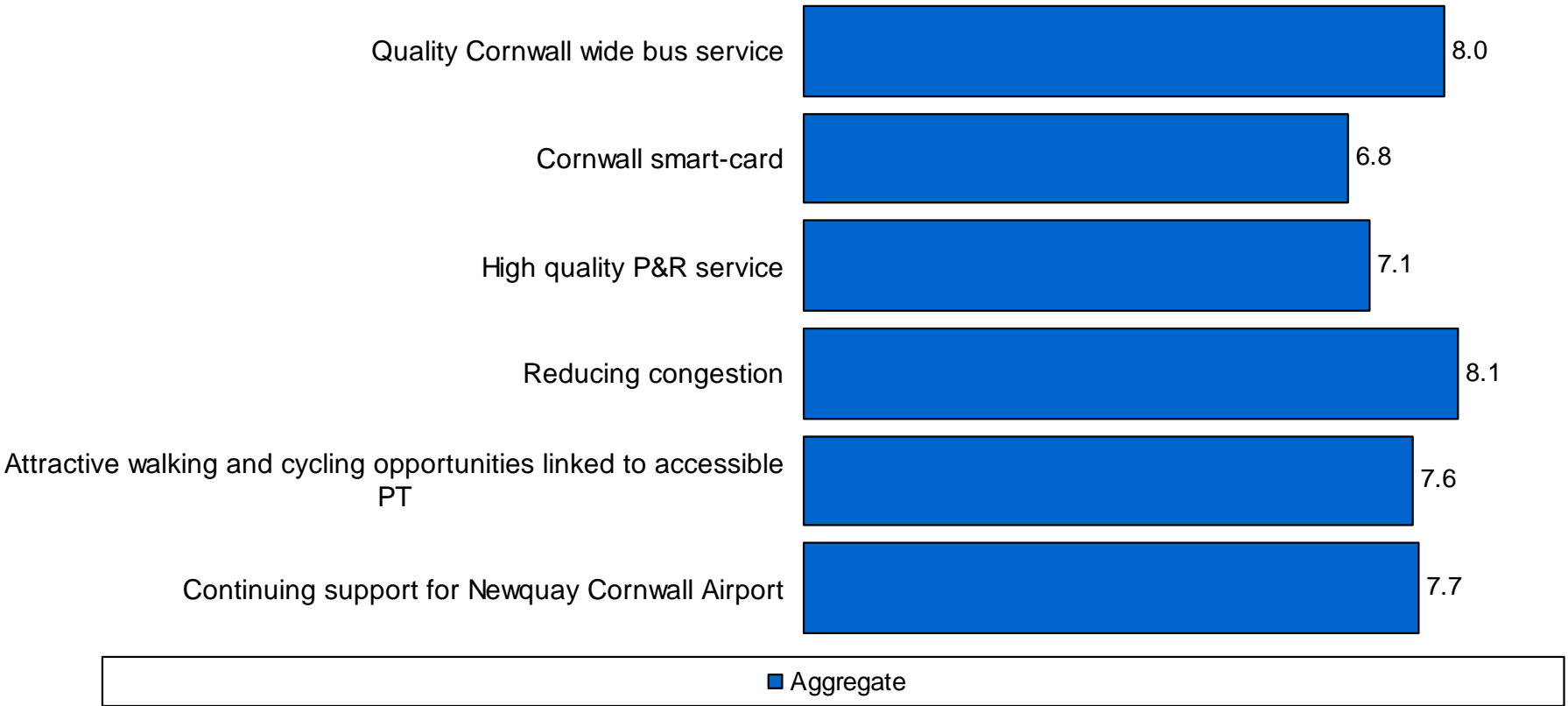


The aggregated data (visitors + residents)

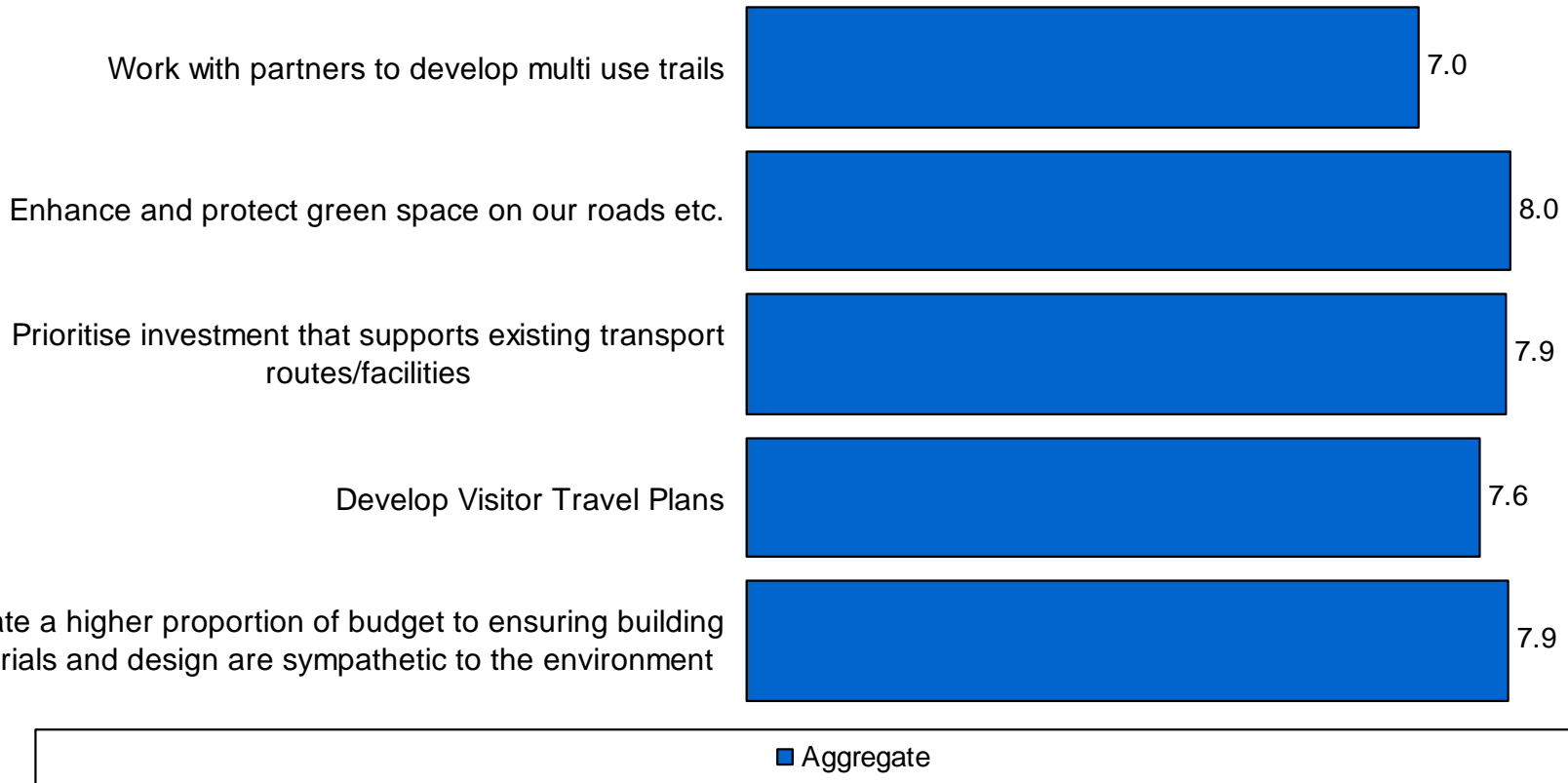
Rating of the CLIMATE CHANGE proposals



Rating of the SUPPORTING ECONOMIC PROSPERITY proposals



Rating of the RESPECT AND ENHANCE THE ENVIRONMENT proposals



Rating of the HEALTHY ACTIVE LIFESTYLES proposals

Greater priority to walkers and cyclists in built up areas

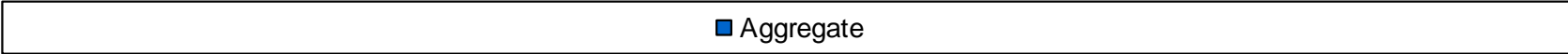


7.3

Provide facilities to cyclists to enable integrated travel with PT and cycle parking in towns



7.3



Rating of the COMMUNITY SAFETY AND INDIVIDUAL WELL-BEING proposals



Rating of the EQUALITY OF OPPORTUNITY proposals



