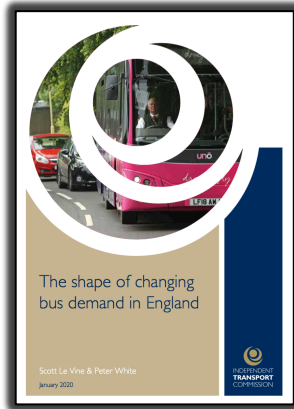


## ITC NEWSLETTER

## WINTER 2019/2020

### RESEARCH UPDATE

### THE SHAPE OF CHANGING BUS DEMAND IN ENGLAND



The ITC has played a major role in developing a better understanding of changing travel trends in Britain. With the help of a generous grant from the Rees Jeffreys Road Fund, we have recently been exploring the shifting nature of bus travel demand in England, the findings from which have been released in a new report published in January 2020. Authored by travel demand experts Dr Scott Le Vine and Professor Emeritus Peter White, the report uses the National Travel Survey as well as other demand studies to provide a picture of the changing shape of bus demand in England.

Bus travel in England has been declining in recent years. Outside London, the number of journeys has fallen by more than 15% since 2009, while in London, after a period of growth in the early years of the century, patronage has been

falling since about 2013. This is a matter of some concern not only for operators but also for policy makers since the bus is a favoured form of travel by low income groups and by those who have no household access to a car. The ITC study explores the nature of this decline in bus travel since the Great Recession of 2008-09 as well developing fresh insights on how the market for bus travel across England is changing.

The findings from this new study are remarkable. First, it is clear that the decline of bus travel has arisen from a shrinkage in the percentage of the population who are bus users, rather than existing bus travellers making fewer journeys. The falls in bus travel have been particularly steep amongst students and shoppers: traditionally some of the largest markets for the bus. In addition, the mode is losing market share amongst its core market of low income groups and those without access to a car: cohorts that have a high propensity for bus travel. More positively, the study identifies that bus travel is growing in some areas of the country, particularly in Southern England and in economically flourishing cities where incomes are higher, indicating that bus demand is shifting towards new markets. In addition, the study found little evidence that bus is losing significant market share to taxis and private hire services. We will now be taking the findings to leading policy makers and exploring with them the implications for the future of bus travel.

### ITC COMMISSIONS NEW RESEARCH PROJECT WITH THE CAA TO EXPLORE THE POLICY IMPACTS OF NEW AVIATION TECHNOLOGIES.

A central objective of the ITC is to identify the strategic policy challenges that the UK will face over the coming decades. One of the most significant changes we face is in the field of aviation, where new technologies including drones, electric propulsion for passenger aircraft, hypersonic travel and smart systems are likely to change radically the shape of the industry. Regulators and policy makers will need to be fleet footed if they are to ensure that these developments are properly managed in a way that balances important issues such as safety, environmental protection and customer convenience.



To investigate these challenges, the ITC is delighted to announce that it has teamed up with project partners the **Civil Aviation Authority (CAA)** and the **Strategic Aviation Special Interest Group (SASIG)** to commission a major new research study. The research team, led by aviation experts Chris Cain and Northpoint Aviation, will be exploring a range of technological developments and associated policy issues during 2020 with a view to publishing a final report by the Autumn which is likely to be of keen interest to both policy makers and industry experts.



The project aims to explore those new aviation technologies which have a reasonable prospect of becoming commercially viable over the next thirty years. Using a range of data sources, the research team will assess not only how these technologies may be disruptive but also how they can be harnessed to address major national policy aspirations. A central objective will be to understand the unintended consequences that might arise from widespread use of such technologies, as well as the challenges that policy makers and regulators will face in ensuring these developments do not impede safety and environmental concerns. The research study will involve a wide-ranging consultation exercise with industry experts, commercial organisations and other stakeholders.

**For more information on recent ITC research and events please see our website: [www.theitc.org.uk](http://www.theitc.org.uk)**

## ITC EVENTS

### 29<sup>TH</sup> OCTOBER 2019 ITC AUTUMN DISCUSSION EVENING

#### What will be the transport impacts of Clean Air Zones in our cities?

In order to tackle poor urban air quality Clean Air Zones (CAZs) are being established in a number of UK cities to help reduce public exposure to pollutants. These Zones are currently divided into charging and non-charging areas, and a range of options now exist on how widely to place restrictions on vehicles. As a result, the introduction of CAZs is likely to have a significant impact upon transport within our cities. How best should CAZs be framed in order to be both effective and equitable for city residents? And what steps should be taken by policy makers to reduce the likelihood of unintended and counter-productive transport consequences?



To debate this important topic, the ITC held a Discussion Evening on 29<sup>th</sup> October. We were delighted to welcome a highly distinguished expert panel from both the public and private sectors. The panel included: **Mai Jarvis**, Environmental Quality Team Manager at Oxford City Council; **Steve Gooding CB**, Director of the RAC Foundation; and **Aart Hille Ris Lambers**, UK Commercial Director of DP World. The open discussion that followed was moderated by ITC Chairman and transport expert **Terry Hill CBE**.

Key issues raised on the evening included the need for cross-departmental collaboration when establishing CAZs as well as greater support from central Government. It was noted that more research on the impacts of CAZs would be welcome, including insights on the effects on low-income groups, businesses and freight operations. Many delegates suggested that CAZs should be designed to encourage long-term behavioural change in favour of using non-polluting transport modes. There were several calls for more support to be provided for businesses operating within CAZs, given the potential damage that could be caused to local SMEs from restricted freight traffic. Others noted that CAZs focused too often on exhaust emissions, when brake, tyre, clutch and road wear were also major sources of urban particulate matter. Above all, delegates agreed that local government would benefit from more targeted central Government interventions, such as scrappage schemes, road user charging, and infrastructure provision for clean vehicles. A full report on the event can be found on the ITC website at [www.theitc.org.uk](http://www.theitc.org.uk).

### 10<sup>TH</sup> DECEMBER 2019 ITC ANNUAL DINNER AT THE HOUSE OF LORDS

#### Annual Dinner for Corporate Members hosted by The Rt Hon Lord Freeman

The ITC was delighted to welcome senior representatives from our corporate members to our 2019 Annual Dinner on 10<sup>th</sup> December. We were honoured to hold the event this year in the magnificent surroundings of the Attlee Room at the House of Lords, where we were kindly hosted by ITC Patron Lord Freeman: the former Minister of State for Transport.

Lord Freeman gave an inspiring welcome address observing the rapid changes that are affecting transport, and the challenges these present for Parliamentarians. He praised the ITC's evidence-based research work and our ability to address these strategic concerns. Guests listened to a review of the year from the ITC Chairman as well as updates on the ITC's research programme. The valedictory vote of thanks was given by veteran ITC Commissioner Professor Peter Jones OBE.



## FORTHCOMING EVENTS:

### 12<sup>th</sup> February: Winter Discussion Evening on the scalability of new fuels. 6:15 to 9:00pm at the Cowcross Street Gallery, London

Our Winter Discussion Evening will explore alternative low carbon fuels in transport and whether these can be scaled up to become commercially viable. Guest speakers include Professor David Cebon (University of Cambridge) and Mike Muldoon (Alstom). The discussion will be chaired by ITC Commissioner Kris Beuret OBE.

### 30<sup>th</sup> June: The 2020 ITC Annual Lecture 6:30 to 9:00pm at University College London, Gower Street, London

The ITC is delighted to welcome **Professor Lorraine Whitmarsh** (University of Cardiff and Director, UK Centre for Climate Change) and **Chris Stark** (Chief Executive, Committee on Climate Change) to deliver the 2020 ITC Annual Lecture exploring how we should adapt our transport infrastructure to be more resilient to climate change.

**All our corporate supporters receive invitations to our core events; for enquiries please email the ITC Events Manager at [events@theitc.org.uk](mailto:events@theitc.org.uk)**