



Every journey makes a difference:

How we can support people
to switch how they travel

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Foreword

The way we live our lives is changing. We now work, shop, do business, and socialise in ways we would not have expected 10 years ago.

The way we travel is only starting to catch up and is at present not always delivering the same benefits we once believed.

The key question is how we achieve this, taking communities with us to improve quality of life, productivity and the environment.

For most people across Great Britain, the car is still the primary way of getting around. Whether commuting for work, taking kids to school, shopping for groceries or seeing friends, cars are the way we make most of the journeys in our life.

We choose to do this because it seems like the most cost effective and practical option for the journeys we are making. It is arguably embedded in our behaviour.

Despite the important role cars play in how we get to where we need to go, our research shows that most people are open to using their car less. Already some people have responded to rising fuel prices by using their car less and taking journeys by other means.

For some people though this is not possible or practical. They are left with the choice of paying more or not making a journey. This affects them and the businesses they are travelling to.

Switching journeys can make travel more affordable, unlock economic growth by removing cars from the road to make important journeys happen more quickly, and improve local communities by making them more pleasant and liveable. Without doubt, reducing car usage will significantly reduce emissions and support the UK's net zero ambitions. However, there are wider reasons for making this shift, with a balanced policy approach helping people save thousands of pounds.

What this report sets out is how modest changes can enable a big switch in how regular journeys are made and can take place in a way that local communities will support.

Stagecoach is unashamedly in favour of people having the widest choice possible when it comes to how they make journeys. But equally, this report is not intended to be anti-car. Cars will still be essential for many journeys, but for some journeys other alternatives, be that bus, rail or active travel, could be more appropriate.

Right now, many people are unable and unwilling to make this switch because of personal circumstances, the type of journeys they make and the decisions policy makers take. But even just converting one car journey to a more sustainable travel mode would help to make a considerable difference.

The research we have carried out provides practical, easy to implement solutions which are rooted in evidence and tested with the public. We recognise that any policy interventions that seek to shift public behaviour need to meet two objectives: firstly, being effective, and secondly being publicly acceptable so it secures local consent.

Through this research we have looked to test individual measures – and the concept of behaviour change interventions generally – and identify which ones government and local authorities should focus on.

As the new government explores how the shift to net zero can be delivered in a pro-growth way which is affordable for individuals, we seek to provide a contribution to how this can be achieved in a simple, fiscally responsible and balanced way. Similarly, as local government faces pressure to act now to help local communities with the cost of living crisis, immediate action can be taken through enabling people to change how they make journeys.

By using schemes such as Clean Air Zones and bus fare caps, local authorities can help their residents save money to address cost of living pressures in a sustainable way. Measures that reduce car trips in favour of clear practical alternatives also help to make other ways of making journeys better, including more reliable buses, safer streets and cleaner air for those on foot and cycling.

Local authorities must be prepared to take this action now, and central government must create the right framework to enable this balanced approach to policy making.

We do not need everyone to change how they make every journey, but each journey people do switch will have a tangible difference and we need to support people to make these positive choices.

Executive Summary

Millions of people across Great Britain are ready to make the switch from using their car to public transport and active travel. However, they are currently not doing this due to how they think about their journeys and the suitability of alternatives.

Local and central government policy making can drive a big shift in how these people make journeys. By making cars less attractive and other modes, such as bus, more attractive, millions of people will drive less. This will save people money, reduce emissions and remove cars from the road to reduce congestion that impacts communities and local economies.

Making the right choices, that blend policies that encourage public transport usage and discourage car usage, can attract the support of residents and help to communicate why these decisions are both necessary and beneficial.

This report unpacks the number of people ready to make the switch, and the steps central government, local councils and public transport businesses can take to support this.



£6,000

The amount households can save each year by switching journeys¹



54%

Would be open to switching some or all of their car journeys



51%

Agree that local authorities should encourage communities to switch journeys



173

Trees needed to offset the 3,643kg of annual CO₂ equivalent emissions from a four person household²

Research methodology

Our research consisted of a 4,282-sample representative survey of UK residents who have a car and live 15 minutes or less in walking distance from a public transport stop, such as a bus/tram stop or a train station. Age, gender, and region quotas were set based on an initial nationally-representative sample of 1,005 respondents which established the demographic makeup of those who have a car and live 15 minutes or less from a public transport stop. The data in the 4,282-sample survey was weighted to be representative of that demographic.

In analysis we undertake that identifies the miles driven, emissions impact and cost to consumers, we use averages drawn from the representative sample across the UK. Our analysis excludes electric vehicles and other new modes of transportation.

We also conducted 45-minute interviews with 15 Oxford-area residents who drive a car into and/or around Oxford fairly or very regularly. Where we cite an example, we have changed the interviewee's name. We interviewed a mix of ages and genders and spoke to people who drive in the city for a range of purposes. Additional research on the Oxford context was gathered through conversations with Oxfordshire County Council employees. Oxfordshire was chosen in light of the range of policy measures the council has recently announced to provide reaction and reflection from local residents.



392,846tn

Amount of CO₂ that can be saved each week by helping people switch journeys³

The journey has already started

81%

number of people reducing car journeys due to rising costs

Motorists are already making the switch

People are already changing the way they travel to work, education, the shops and more.

Whilst some are making this change because of increased awareness of the environmental impact of their journeys, rising costs are also having a direct impact on how people travel around their communities. Four in five (81%) car users have reduced the number of journeys they make in the months before this survey was undertaken in July 2022, as a consequence of increased fuel costs. At this time petrol would have ranged on average from £1.70 to £1.80 a litre.

As motorists hesitate to make a journey by car due to increased costs, they are instead opting to travel by other means. For those that are reducing the number of journeys they make by car, we are seeing two-thirds use alternative options such as walking, cycling or the bus. The other third are not being made or grouped with other journeys and this could be affecting businesses that rely on customer volumes.

All motorists make important and necessary journeys every day or week and in the face of rising costs, they are willing to change their habits. The role of policy makers and public transport companies is to support this switch so that people can still make the journeys that matter to them. We are heading in the right direction but there is more to do.

Motorists are ready to change how they travel

We have found that the majority of motorists are open to changing how they travel. Whether for work or leisure, millions of people are receptive to not using their car and travelling by different means.

Over half (54%) of people would be open to switching some or all of their journeys to bus, foot, bike or rail. This accounts for millions of people and hundreds of millions of miles. Helping these people make the switch would be transformative to the UK. Achieving this transformation does not require everyone to switch all of their trips, but for those that are willing to make some changes where they can and are ready to. It confirms that, if policy makers and public transport companies get the approach right in the coming years, we will significantly transform how people get around.

54%

number of people open to switching a journey

Our findings also show that local authorities and national government are aligned with overall public opinion when exploring ideas to support people in the switch in how they travel. There are a large number of people ready to make the switch if we provide the right encouragement that makes change easy and the targeted interventions that sway people away from their car for some journeys.

By supporting people ready to make the switch, we will improve the wellbeing of individuals and our communities. Making a journey switch reduces the cost of commuting, lowers emissions to help protect our environment, and removes cars from the road to address congestion.

Research conducted by WPI Economics for the Confederation of Passenger Transport earlier this year found that if we all took the bus instead of the car twice a month, the benefits by 2050 would be:

- A reduction of 15.8m tonnes of CO₂e, equivalent to the total emissions of the North East in 2019
- Reductions in air quality pollution valued at £28m, enough to pay for 800 nurses for a year
- Health benefits worth £14.9bn, enough to build 33 new NHS hospitals
- Reductions in congestion valued at £29.4bn, more than the GDP of Manchester in 2019⁴

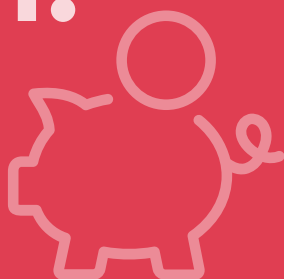
What impact will making the switch have?

Helping millions of people make the switch to other forms of transport, whether walking, cycling, rail or bus, will have a dramatic effect on them individually and our communities.

If local authorities, central government and public transport companies can enable a big switch in how people make journeys, it will deliver sizeable savings to households, make a significant contribution to achieving net zero quickly, and support productivity and economic growth by freeing up space on our roads for necessary journeys. Each journey that people switch will make a tangible difference.

Across the next three sections, we map out the benefits motorists will feel as they change their travel habits:

1.



Cost: Making travel more affordable

The typical household* can save between £1,040 to over £6,000 annually by switching all of their journeys.

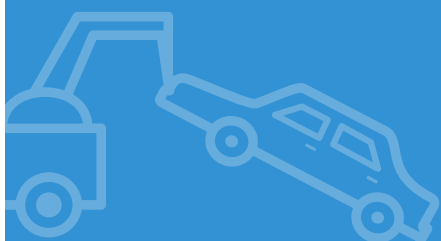
2.



Environment: Delivering net zero without families footing big bills

Over 212 billion miles are driven by households in the UK each year, emitting 61.75 million tonnes of CO₂ equivalent annually.

3.



Easing congestion: Unlocking road space for essential journeys

Switching some journeys to other forms of transport can remove around one billion miles of car journeys per week.

1. Making travel more affordable

Owning, fuelling, and maintaining a car is costly. As well as the purchase and annual servicing costs, every mile driven costs money through fuel prices, insurance and depreciation. Switching car journeys for bus trips and/or active travel could reduce these variable car running costs and have a significant, positive impact on households' purse strings.

Introducing the right policies, including supporting a long-term scheme to lower bus fares, can lead to a significant reduction in commuting costs if people

switch their journeys. An illustrative household of two adults and two children can save between £1,040 to over £6,000 annually by switching all of their journeys.⁵ These savings can be enhanced further where people are able to use weekly or monthly bus tickets that help to reduce the cost of travelling even more.

Making journeys more affordable not only means households have more money in their pocket, but it also means they can continue to make trips to shops and restaurants and support businesses. It allows people to continue making non-essential but desirable trips that drive economic activity on high streets, as people know they can get into town without high fuel or other costs, such as parking, to deal with.

£6,000

Can be saved by switching from car to bus or active travel*



*The cost benefit is based on an illustrative household of two adults and two children changing all of the journeys from car to other modes of transport. This ranges from at least £1,000 if all journeys are by bus to more if small journeys are made by walking or bike.

2. Delivering net zero without families footing big bills



173 trees

needed to offset the 3,643kg of annual CO₂ equivalent emissions from a four person household

Switching high-carbon journeys for low-carbon alternative modes of transport can significantly cut every family's carbon emissions quickly and without significant upfront spend.

Over 212 billion miles are driven by households in the UK each year according to our survey – that's the same as one person driving every mile of Britain's roads 848,000 times. At an average of 40mph, that would take someone just over 600,000 years to complete. Those car journeys emit 61.75 million tonnes of CO₂ equivalent annually.⁶ That's the same as burning 30.99 billion kilograms of coal or consuming 142.96 million barrels of oil.⁷

To offset 3,643kg of emissions for the car usage of an illustrative household (of two adults and two children), you'd need to plant 173 fully-grown trees a year.⁸ Across the nearly 30 million UK households, that's almost five billion trees. To achieve this, you'd need about 9.5 million acres which is just bigger than the entire North of England.⁹

It is one of the single biggest steps households can take to reduce their emissions and, unlike other lifestyle changes, it is something immediate they can do now. It doesn't require major interruptions to their homes, major outlay for new technology or a change to shopping habits. Making switches to how people travel is a non-costly and unintrusive way of cutting millions of tonnes of carbon emissions each week and making swifter progress to delivering net zero without families having to foot big bills as long as viable, affordable public transport alternatives exist. Based on the emissions from Stagecoach buses last financial year, if each registered car owner in the UK swapped one 10-mile journey in a diesel car to a 10-mile journey in a diesel bus, we could reduce our global contribution of emissions by about 25,000 tonnes. This is the equivalent of swapping 709 diesel buses to electric ones for one year.

3. Unlocking road space for essential journeys

Our roads are frequently clogged with cars trying to get to where they need to go. Freeing up space on our road network will help essential journeys – whether for emergencies, deliveries or more reliable public transport.

Across the UK, our analysis shows that roughly 40 million people drive around four billion miles a week. Introducing any one measure that can help people switch some of their journeys to other forms of transport can remove around one billion miles of car journeys per week.

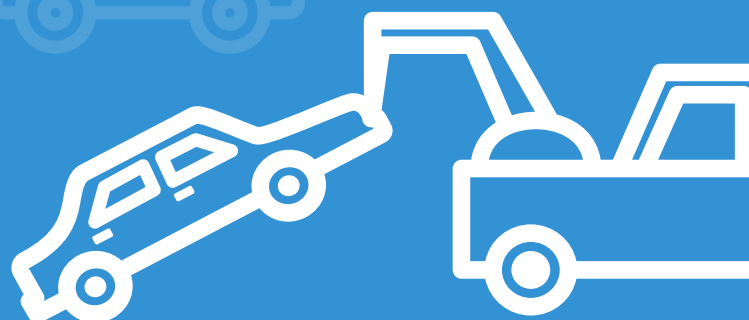
Removing that many miles of journeys is equivalent to removing 10 million cars from our roads. That would be like freeing up the whole M25, if the M25 had 239 lanes of bumper-to-bumper traffic.¹⁰

“If you can save 50 cars going into the city centre and just use one bus that’s electric, the air’s going to be cleaner... your health could potentially be better...it’d be worth it”

Oxford resident

Removing this many cars from the road will mean communities are not plagued by wall-to-wall traffic and the noise and air pollution this can bring, and will help to make public transport more sustainable and reliable. It will also help power productivity, by helping important deliverers or other workers who rely on quickly navigating our road network.

Congestion costs the UK economy over £8 billion annually as drivers spend tens of hours in queues.¹¹ Congestion is a barrier to growth and simple shifts in how people travel can both address this cost and help enable growth. We have already seen working from home save drivers hundreds of pounds as fewer people commute to work according to INRIX.¹² Removing even more cars from the road will make way for important journeys, helping prevent economic loss and avoiding snarled-up communities.



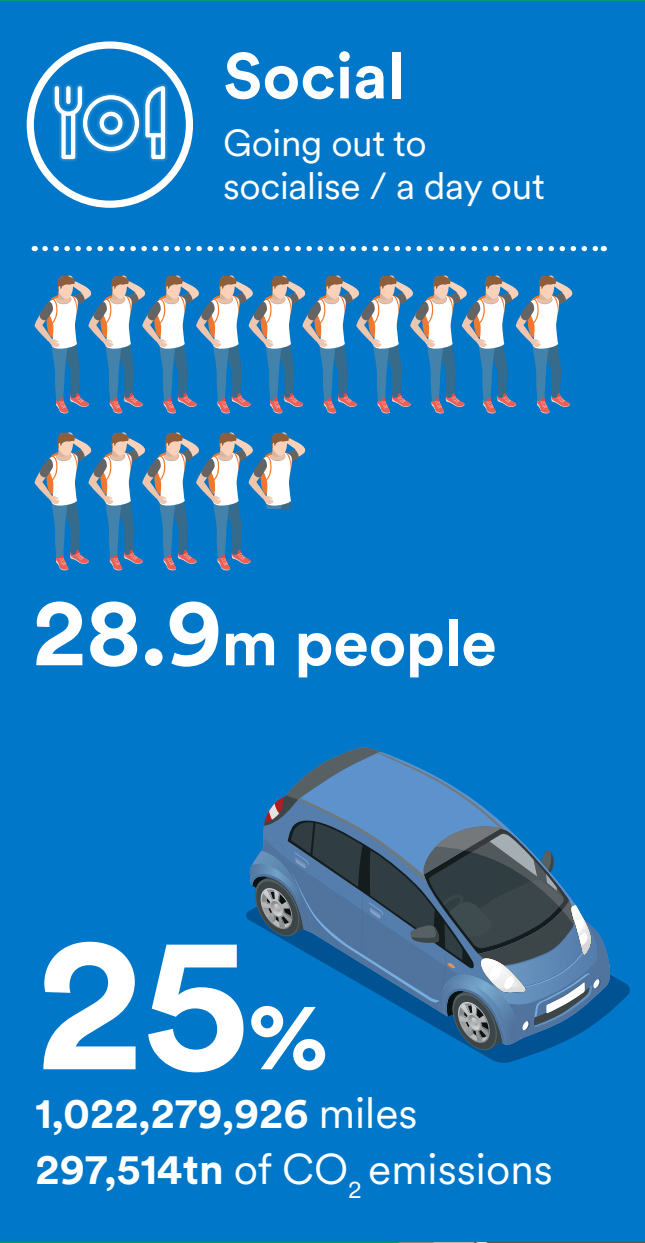
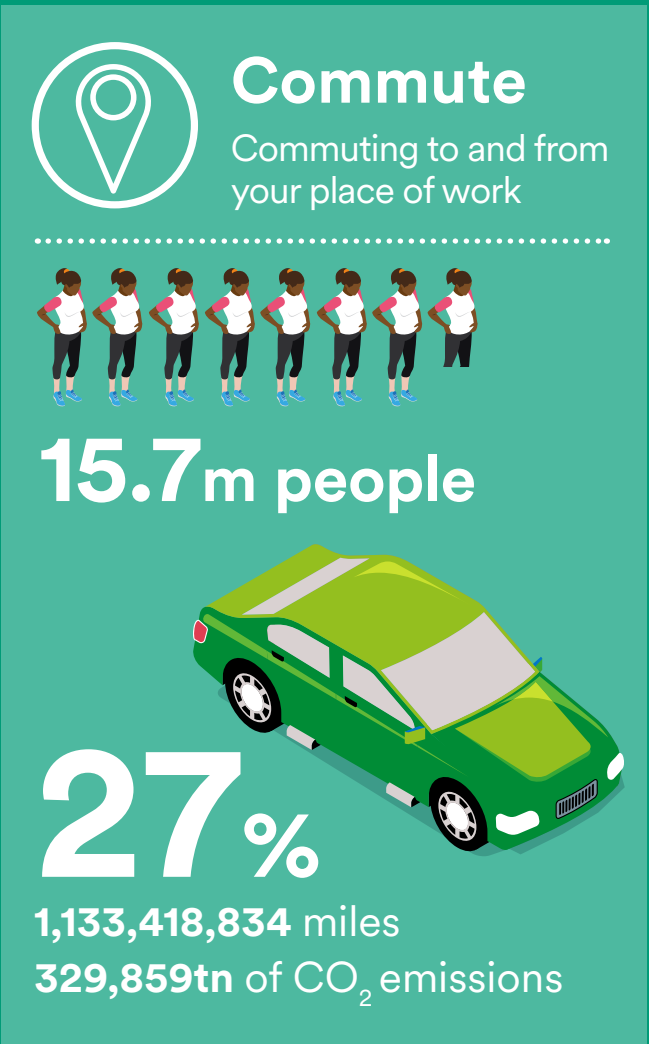
The journeys we make

The journeys we are making

The decision to make a trip by car and the experience of doing so varies greatly depending on the kind of journey people are making. Recognising this complexity, our research surveyed 4,282 car-drivers about five specific journey types that they might take: commutes, social journeys, shopping journeys, personal activity journeys, and school runs.

The journeys we make have an impact on our roads and our planet. Below we have mapped out the number of people making the journeys, the miles travelled when making these journeys and the CO₂ equivalent emissions each week.

Across the UK each week, those journeys look like this:¹³



One figure shown equates to two million people



School run

Taking children to and from school / nursery



10.3m people

10%



391,915,226 miles

114,059tn of CO₂ emissions



Shopping

Going shopping and running other errands



39.2m people

23%



928,839,086 miles

270,320tn of CO₂ emissions



Personal activity

Going to a personal leisure or fitness activity



22.3m people

15%



603,714,465 miles

175,699tn of CO₂ emissions

What is on peoples’ minds as they make their decision?

People take decisions about how to make their journey for a range of reasons, including:

- Experience
- Practicality
- Cost
- Timing

Cost considerations may present as fuel costs, parking charges, tolls or other things needed to complete the trip. Practicality may account for ease of finding parking, load transportation, and who is making the journey with the driver. Timing considers how long it takes to complete the journey and whether this is affected by disruptions on route that lead to delays. Finally, aspects such as safety, comfort, and general pleasantness feed into the overall experience of the car trip.

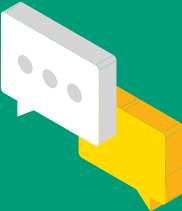
These factors have varying influence depending on the type of journey made. For example, practicality looms large in the minds of drivers when embarking on a shopping trip that involves carrying heavy bags, while cost is particularly significant when commuting because many make that journey each and every day.

These journey determinants should be front of mind for policy makers and public transport companies when making decisions on how we support people to make the switch, either through the policies we use, or the way we reassure people to make the switch. Doing so can make those open to making the switch feel most comfortable and ready to do it.

Case Study:

Oxfordshire resident Deep Dive

We spoke to residents across Oxford to understand why they make journeys the way they do, and the hesitations that stop them using some modes.



“I prefer my car, I like to take myself, I prefer the drive up, the privacy, the fact that I can have the radio, I just enjoy it more”

“Sometimes it’s easier just to get in a car, park up and go, rather than have my kid crying about a more difficult trip”

“Sometimes we can’t take the Park and Ride because we have stuff to carry so we need the car”

“It depends on how much parking is going to cost – I need to ask, is it cheaper to do the Park and Ride?”



Experience



Cost



Practicality



Timing

“I’ll take the bus in if it’s more hassle to find parking, maybe if I’m going into central Oxford to meet someone”

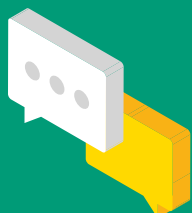
“It comes down to time and who I’m with”

“I’ll take the S6 bus only if my partner has the car or if I’m drinking”

Case Study:

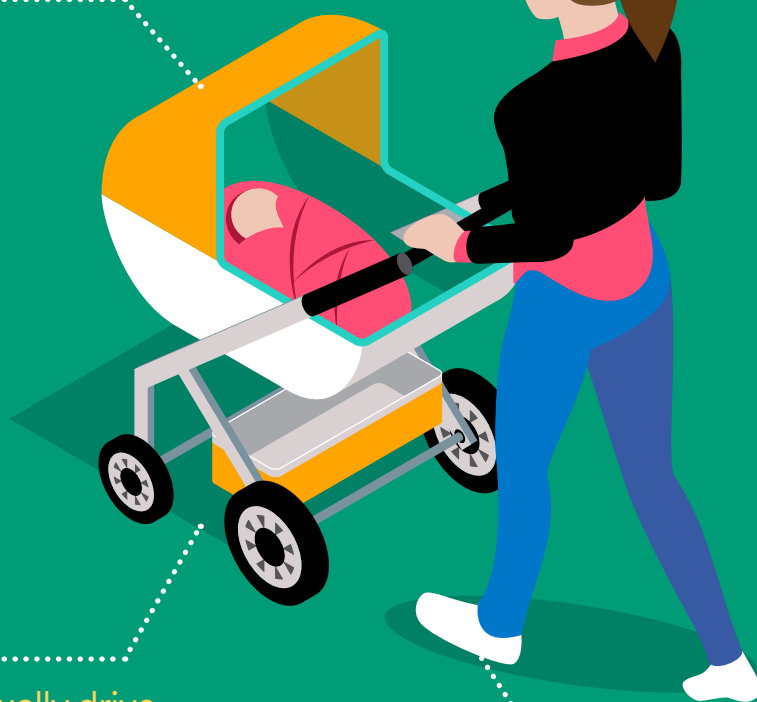
Oxfordshire resident Deep Dive

Cecilia, who lives in a village outside of Oxford, described how the mode of transportation she takes to get into Oxford depends on the type of journey:



“I drive to work, because the train takes you into the centre of Oxford, but my work is outside of the centre, so I’d have to then take a bus or taxi, whereas if I drive I can just get straight there”

“If I’m with a friend, we usually go out within the centre, so I’d get the train”



“To visit family, I usually drive because they live outside of the centre and have free parking so it’s easier”

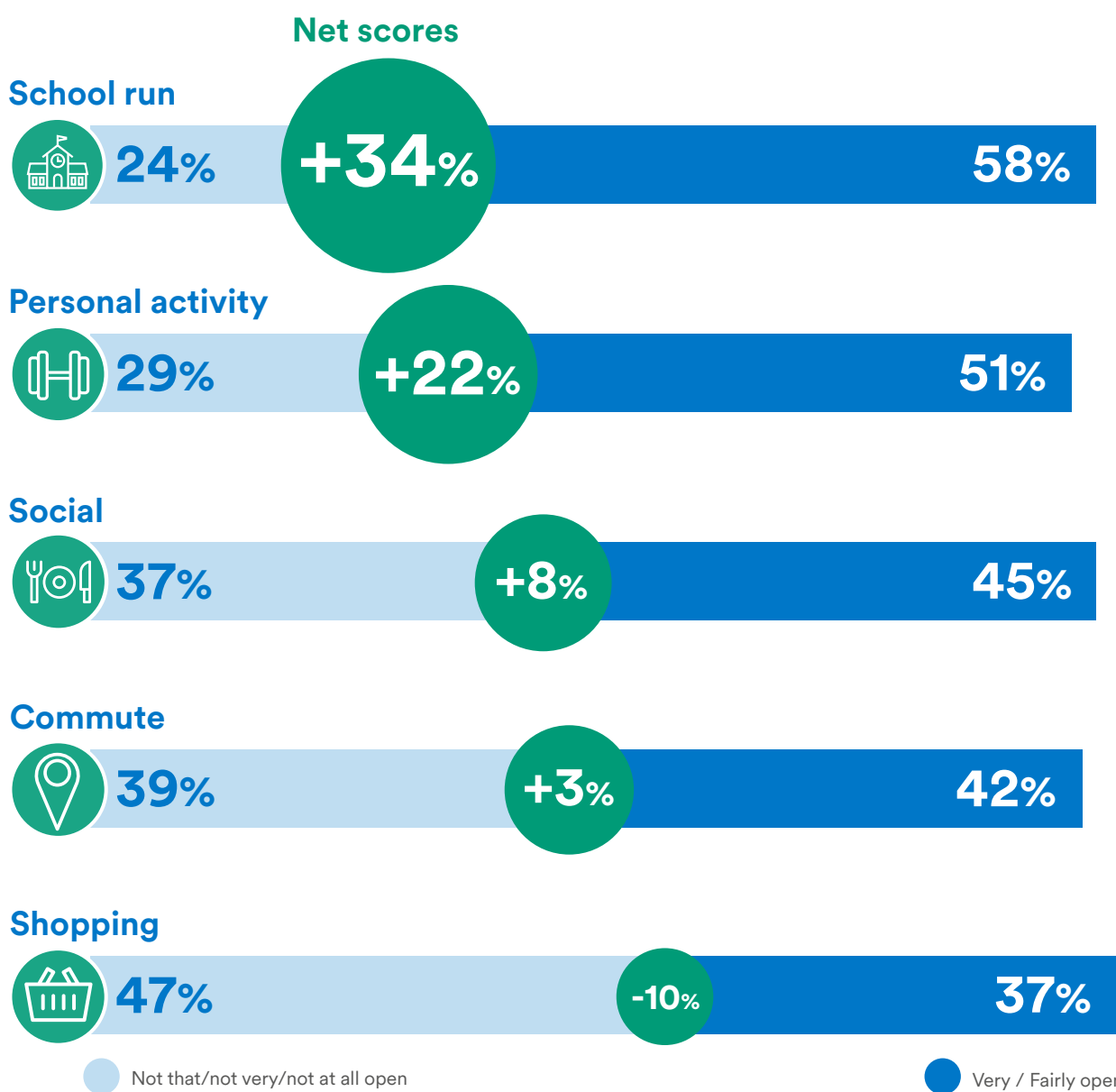
“For shopping, I wouldn’t drive because parking is quite expensive and the shopping centre is so close to the train station that it just makes sense to take the train”

Which journeys are people ready to switch?

The openness to switch from car-based travel to alternative modes varies across the type of journeys and key demographic groups. Critically, in all journey types, large numbers of people are open to switching how they travel. Across the different journey purposes that we surveyed, people are most open to using their car less, and other modes of transport more, for school runs and personal activities such as going to the gym. Conversely, people are much less willing to consider the prospect of switching modes when commuting or shopping.

The distance of the journey is a deciding factor – people who make short-distance journeys are overall more open to considering a different mode of transport than those making longer journeys. This highlights a correlation between journey and travel mode association and indicates where people are more likely to be flexible in their transport choices.

Similarly, openness to switching differs on account of who is making the journey. Naturally, those who feel more negatively towards car journeys in general are significantly more likely to consider public transport or active transport. Younger people aged 18 to 34 and those living in urban areas are also more willing to consider changing how they travel than those aged 55+ or living in more rural communities.



Who is most open to change?

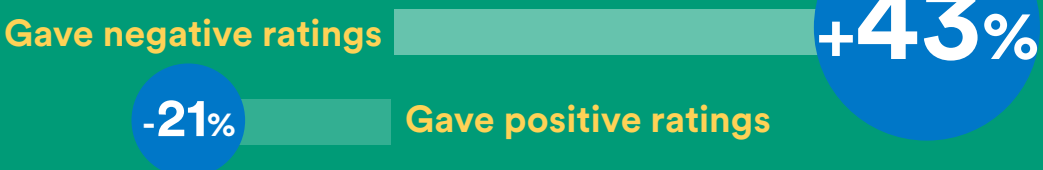
Our analysis shows that openness to switching journeys is affected by both the type of person and type of journey they are making. This is essential in understanding who we can best help to make the switch to achieve significant reductions in their travel costs, emissions and overall congestion, and who feels the greatest need to continue using their car for journeys they deem essential.

Across all types of journeys, a large number of people are ready to switch their journeys. What government, local authorities and public transport providers must do is help make it a reality.



Net openness scores¹⁴ are highest for those who:

Those that didn't enjoy car journeys



Those who are younger



Those who live in urban areas



Tend to drive short distances



Changing driver choices

People are ready for local authorities to act

Helping people make the switch requires proactive measures from national governments, local authorities and public transport operators. When authorities and operators take action, it both directly impacts the decision that drivers make and also sends a strong signal of what types of journeys should be made by car, and which should not. Delivering a significant switch in how people travel cannot be delivered by the market – through higher fuel costs – alone. To get to happier, healthier and more liveable communities, we need to act now.

The public agrees. The majority of motorists support local authorities introducing policies to help people make the switch to other types of transport, whether public or active. It means that if local authorities introduce interventions in the right way, they will have the backing of much of their communities. National government also must play a clear role in setting the right frameworks and funding to support effective policy.

Not only are the public open to switching journeys, but they are supportive of their local council taking action to help people make the switch. There is fertile ground to achieve a significant step change in how people make journeys that must be seized.

51% agree
27% disagree
that local authorities should be putting interventions in place to encourage lower car usage and more use of other types of transport.

“Something needs to be done, overall this will be a good thing, because we can’t carry on as we are, at least [the local authority is] trying to do something for climate change and for people’s health”

Oxford resident

What local authorities can do to help drive the switch

Local authorities across the country have already begun to introduce policy interventions aimed at making people reconsider whether a car is the right transport method. This includes a workplace parking levy in Nottingham, Clean Air Zones in cities across the country, and low traffic neighbourhoods in residential areas.

We asked car-drivers how a selection of such policies would impact how often they make specific journeys by car. We found that each intervention could save billions of miles driven and thus millions of tonnes of carbon emissions each year.

Doing one thing would help a significant number of people across their communities switch how they make journeys, reducing the number of miles driven and emissions in their area. It would have a considerable, immediate impact on creating happier, healthier, prosperous and more liveable communities that are not dominated by noise and air pollution.

“It’s okay if people are seeing the benefit of it and it’s for the greater good”

Oxford resident

The Switching City

Local authorities have a range of policies at their disposal to help people make the switch. Based on our findings, we have identified the number of miles removed, the equivalent number of cars, and the saving in tonnes of CO₂ equivalent emissions each week. These numbers are representative of these decisions being taken nationally, with no other policy being introduced alongside it, and based on the views provided in our survey. These are set out in the illustration.

Reduced parking

- 1,029,661,023 miles saved
- One in four cars off the road
- 299,662tn of CO₂ saved

Workplace parking levy

Drivers must pay for a £550 yearly pass to park at work

- 409,180,267 miles saved
- One in ten cars off the road
- 119,084tn of CO₂ saved

Clean air/ congestion zone

Drivers must pay £15 to enter a designated zone in the city centre

- 1,349,846,947 miles
- One in three cars off the road saved
- 392,846tn of CO₂ saved



Local road changes

Roads are altered, such as removing through-roads

- 944,715,686 miles saved
- One in four cars off the road
- 274,941tn of CO₂ saved



Road pricing

Drivers are charged 16p per mile driven

- 1,202,538,259 miles saved
- One in four cars off the road
- 349,975tn of CO₂ saved¹⁹

Making change attractive

A local authority committing to take just one action to change driving patterns will deliver significant benefits for their local community. Whilst any individual policy would lead to billions of miles being reduced each week, and a significant improvement in congestion and air quality in communities, residents are often

unwilling to accept one adverse measure on its own. Our research found that motorists are hesitant to support policies that would make cars less attractive if considered in isolation, despite backing the principle of action from local authorities to help motorists switch. Other research has suggested there may be greater buy in for some policies.¹⁵

Q: Would you support or oppose your local authority implementing each of the following?

Support

Oppose

Setting up “Low Traffic Neighbourhoods” with restrictions on through-traffic, so drivers can’t always drive the most direct route / stop rat-runs:



Introducing a zone in the centre of town that you have to pay to enter in a car (e.g. “Clean Air Zone” or “Congestion Zone”):



Reallocating road usage to prioritise bus-lanes and reducing road space for cars:



Charging employers who provide staff car parks, so employers pass charges on to employees who park:



Introducing road-pricing so drivers have to pay per mile to use the roads:



Reducing parking space availability in towns:



Doing just one thing, or making individual policies look like they are not part of a broader package that balances out the impact on local residents, risks local frustration and anger. It means that those people who were open to making the switch to other methods of travel become resistant and, at worst, may not buy into the actions of local authorities. It creates a real political difficulty for local authorities and can explain the slow uptake of policies designed to encourage people to make the switch.

Although taking one action may be the simplest solution, it is unlikely to be the right one for communities. This does not mean local authorities and public transport companies should not take action together. Instead, it means that we need to develop balanced packages of measures that reassure those open to switching, and help them make the switch without negative impacts.

The challenge of delivering a holistic plan

When it comes to the metaphor of the carrot or the stick, Oxford residents are clear on their preference. Locals continuously stress that for these interventions to work and be embraced, there must first be a viable alternative: “It all comes back to public transport and cycling—if you want people out of their cars, you have to give them other options.”

People are eager for better cycling infrastructure and a more affordable and extensive public transport network, and believe this is what will encourage them to shift away from their cars. As one resident expressed,

I don't just want an alternative because the previous option is restricted to me, I want an alternative because I fall in love with how I use the new method of transportation, how it saves me money, how it saves emissions, not because they're restricting cars”

Oxford resident

Oxford-area residents are adamant that these alternatives must exist before the interventions are introduced, otherwise people will be stranded with no affordable or realistic methods of transportation.

Local authority plans often revolve around taking action when funding for them arises, resulting in a staggered process which leaves residents concerned that proper investment in public transport has not yet occurred.



Helping people make the switch

Getting the bus ready for people switching

With residents sceptical of policies that would make cars less attractive, local authorities and central government need to be prepared to offer up an effective alternative to secure buy-in for policies that make people switch how they travel.

Central to achieving this is making public transport a more effective and appealing option, so that it is ready to welcome people onboard and meet their needs. Buses are most regularly the best placed alternative option to current local car trips.

The Scottish Government has introduced free bus travel for under 22-year-olds and the Welsh Government offers 16-to 21-year-olds discounted bus travel through the mytravelpass scheme. Mayoral combined authorities in Manchester, Liverpool, West Yorkshire and the West of England have introduced £2 fare schemes, with a national £2 fare cap in England launching in January. These initiatives are very welcome steps that help to make the bus a cheaper, more appealing travel option for people when they are deciding how to make their journey.

As policies are introduced that discourage using a car, it is critical that there is a long term public transport offering that people can rely on. Reducing the cost of buses is one important way of doing this, ensuring people are able to continue to make journeys easily and affordably. People can then make the decision as to whether using the car is essential, or if a bus would be as good.

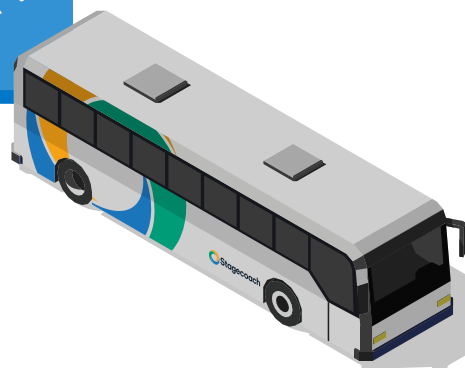
However, this means that time-limited schemes funded by one-off pots of money are only the first step. Once they end, people would once again face a journey penalty. This doesn't work for people's wallets, children going to school or local businesses that want people to make journeys to them. Therefore, we must find long-term solutions that reduce the cost of buses to make sure people can continue to make the journeys they need and want to make.

Part of this should include combining policies that increase costs of car use with subsidies for local transport in the long term. This balancing act will soften the blow on people making journeys if a bus is cheap, reliable, environmentally friendly, and beneficial to the economy. Delivering this change for the long term will also give people the confidence to get rid of their car if they want to.

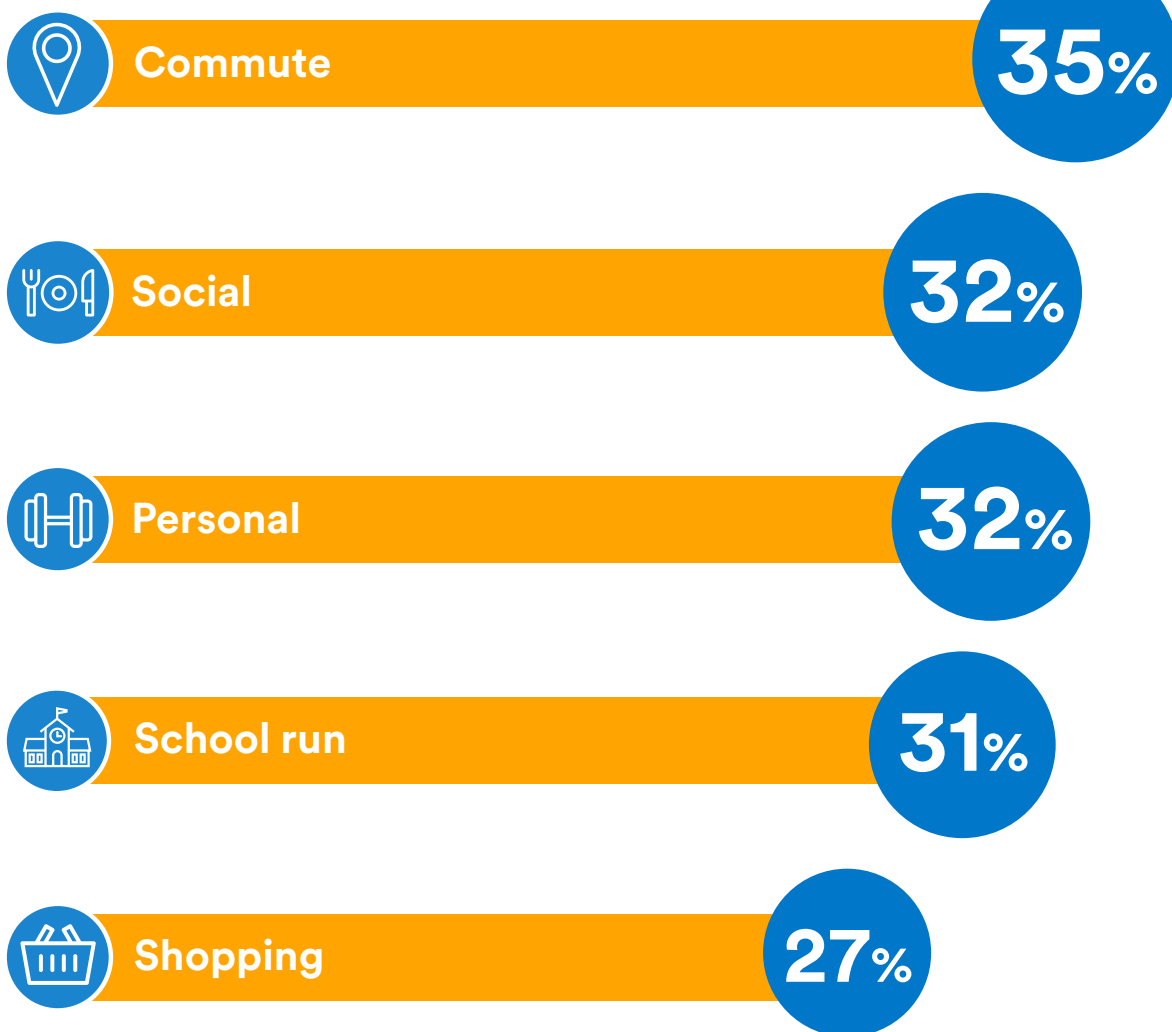
Whilst taking action to reduce the cost of buses to a sustainable level alone will not drive a significant switch in how people travel compared with other policies – approximately one in three people across all journey types say they will drive much less often as a result – it creates a more supportive environment as people will have greater confidence to swap to using a bus. A bus costing £2 rather than up to £6 for a journey will have a significant impact on local residents' choices.

Beyond this, local authorities and central government should work with public transport providers to continue making buses accessible and reliable in line with the needs of communities. This will help buses play their full part and reassure people they can switch to other modes of transport for journeys.

If local authorities reduce bus prices to the lowest sustainable level, people would use their car much less often.



% Who would use the car less often or never



*Results show percentage of respondents for each journey type that would use the car much less often or never if a £2 bus fare was in place.

Driving greatest change

How policy interventions can drive the greatest change

Combining policies that make cars less attractive, and public transport and active travel more attractive, can lead to the greatest journey switching level.

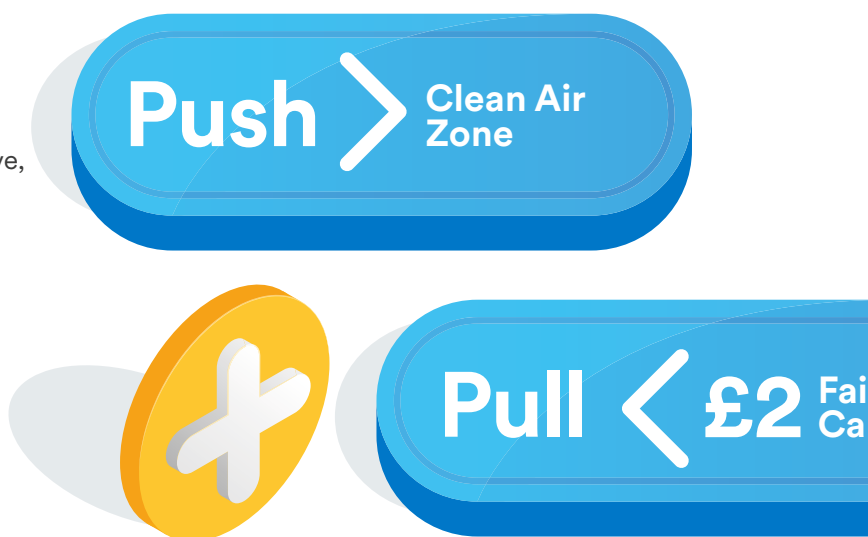
Our research asked motorists how different interventions that local authorities could pursue would affect their usage of a car. It found that, whilst individual policies could have a significant impact, combining a policy to discourage car use with one that made public transport more appealing could lead to approximately half of respondents using a car much less often.

Balanced solutions lead to the best chance of helping people switch their journey habits and reduce car usage. Supporting low, sustainable fares with a Clean Air Zone leads to greater changes in how people travel.

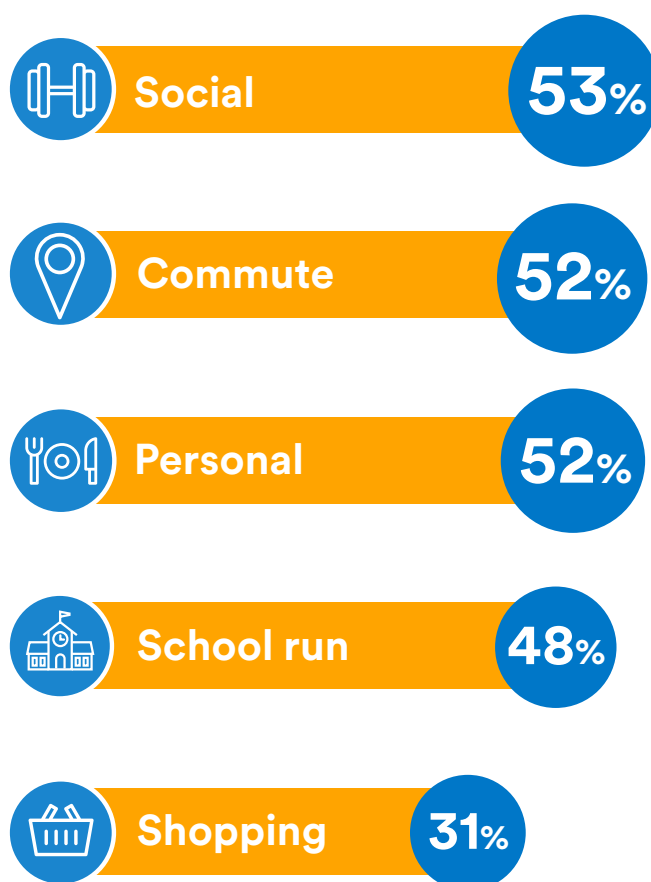
Across all journeys, a combination of a **'push'** factor with a **'pull'** factor is always amongst the most effective in terms of overall reach (always in the top two biggest combinations).

"If things were replaced in a manner that still served the community beneficially, then absolutely, I'd be completely on board with these things—but by simply taking things away then telling the individual person to deal with it, I don't see how that serves anyone. They're not going to get people on board, people will just be cross"

Oxford resident



Saying they'd drive much less or never for each journey:



This has a significant additive benefit. It means that not only are around 50% of people switching their travel habits, but local authorities are able to point to a benefit that residents are receiving because of this behaviour change.

This approach offers a clear route for local authorities to deliver a more significant impact on congestion, emissions and savings for their communities. It also is a more effective way of communicating why they have taken these decisions and helps to soften the impact, particularly on people who previously made every journey by car.

In our research, we also tested adding more policy interventions to see whether this would lead to

further significant improvements in potential journey switching. It became clear that adding in a second car disincentive, such as Low Traffic Neighbourhoods alongside Clean Air Zones and £2 fare caps, only leads to minor further benefits (around an additional 3.5% of people driving much less often across all journey types). Whilst this will have some local impact, it is clear there are diminishing returns for local authorities.

Instead, our research suggests that local authorities should focus on one measure designed to make cars less attractive, and a second measure to make public transport more attractive, to maximise the journey swapping and help them communicate the change.

The benefit of balanced approaches

Where revenue is earned through an intervention, there is a clear preference for that revenue to go towards improving local public transport and active transport infrastructure. Many Oxford residents say they support the Zero Emission Zone in the city more once they learn that revenue will be re-invested in public transport. The consensus is generally that support overall will increase once people are made aware of this fact:

“If it’s directly targeted to improving public transport, that’s going to have a direct impact, rather than going into the general coffers. I think people will support something much more if they can see a direct impact, then you can feel as though you’re actively contributing towards a resolution as an individual, which is quite important”

Oxford resident



Learning from local experiences

We wanted to understand how communities react to and engage with policy decisions. Focusing on Oxfordshire County Council, we surveyed officials and residents to learn how decisions that encourage public transport usage and discourage car usage were being understood and their views as they lived with them.

We focused on Oxfordshire, and Oxford city in particular as it was introducing a series of innovative new scheme to help people switch how they make their journeys. Through the wide array of policies, including a Clean Air Zone, Low Traffic Neighbourhoods (LTNs) and a workplace parking levy, as well as the experience of residents living in an old town, it brought to the fore the challenges of delivering policy change and reflections of local residents. Oxford acts as a snapshot we can learn lessons from in central and local government, as well as across local transport companies, and help shape the actions we take to drive positive behaviour that saves money, improves the environment and reduces congestion.

The key lessons are:

Demonstrate the benefit of policy decisions

Through interviews with local residents, we found that despite clear support from many residents for the council taking action, there was concern surrounding how it is being delivered in practice. In particular, whilst ‘doing one thing’ might work in theory, as our research has identified, there are significant consequences for local communities. This has become clear across authorities where LTNs are introduced. Residents perceive the result of these as traffic being pushed onto a few major roads, causing additional delays for drivers and public transport alike.

Where one intervention such as LTNs should be reducing the miles driven and emissions across a local community, this is not the reality if all cars are pushed onto a few roads and there is no effective alternative in the eyes of local residents.

One resident shared how she used to have three routes she could take to get to work, but now she only has one due to the LTNs. She said that “everybody is funnelled around the same few roads,” causing those roads to become “all blocked up” with traffic. As a consequence, she has had to change the timings of when she makes her journeys, and can no longer

commit to 9:00am meetings because she doesn’t always arrive at work on time. Recounting her frustration with the longer journey times, she added “you know how quick it should be and it’s just not taking that long... It adds so much time, it’s crazy.”

Likewise, another local described how the travel time to drop her husband off at work has almost doubled since the LTNs in Cowley were introduced: “We now have to go halfway around the town and there’s really only one route, therefore everyone has to take it.” She believed traffic has gotten significantly worse as a result of the LTNs, leading her to question what their goal was.

Openness doesn’t mean eagerness

Whilst residents across Oxfordshire were open to swapping how they made their journeys, they were sceptical if they could make the switch. Concerns around practicality for those outside of Oxford and the impact it would have on commuters and local businesses ranked as some of the highest concerns.

If the right steps are not taken to make the switch easy or practical, they are left without support and face a possibly high penalty. If we want people to take the bus, more must be done to make the bus appealing, including ensuring the right routes, low costs, and good reliability. Journey swapping cannot take place without addressing and resolving the concerns of residents.

Good communication is essential

A reliable and attractive alternative for people to use is important. Of equal importance when introducing new measures to discourage car use is communicating the clear link between the two policies. A low emissions zone will be more supported if it is helping to fund lower fares or more frequent services.

Failure to do this means that residents will not recognise the impact one policy has on the other, and support will break down for schemes such as workplace parking levies or clean air zones. Getting it right however can make residents more receptive to car disincentives. It means that not only should local authorities look to adopt balanced solutions, but that they should communicate them as a package of policies to get local buy in.

“Messaging about how it’s going to improve the world we live in should be at the forefront; they should be really open and clear about how the revenue will be used on new facilities and distributed to new modes of transport”

Oxford resident

Communicating the benefits to local communities

One of the key issues raised by local residents was about making the case for car disincentives by explaining how charges would be reinvested into public transport. None of the locals we spoke to had heard about how the revenue from the Zero-Emission Zone would be spent, a missed opportunity to get people on board with the idea. Locals believe the council needs to proactively defend the benefits of the interventions and convince people of them.

In addition to outlining the environmental benefits, residents also want the council to show how less traffic and better public transport could improve people’s daily life: “Show people the reduction in traffic and time it will take to get them from A to B, as opposed to letting traffic carry on the way it is; that would peak my interest and make me think it’s maybe not that bad of an idea after all.”

Part of this must also be about the way we describe policies. Focusing on the negative in policies such as the workplace parking levy can tangibly effect people when compared to Clean Air Zones. Local authorities should consider the way they describe and name policies and the role this can play in supporting consumers.

No one-size-fits-all- alternative modes don’t work for every person and journey

When implementing modal shift interventions, local authorities must acknowledge that certain alternative modes of transportation will not be suitable for everyone. There are a range of reasons why walking and cycling are not feasible alternatives for particular journeys and people, which include disabilities, insufficient active transport infrastructure, and the need to transport children and supplies. The fact also remains that public transport options do not exist for every journey, especially for those in small villages. Residents are keen for the local authority to consider these reasons and account for them in their plans.

“Communication is the key; if they’re going to put it directly back into public transport then that’s a good selling point, because everyone knows the problems Oxford has with the traffic and something needs to be done, so if they sell it the right way, then that could be good”

Oxford resident

Delivering a significant switch

Conclusions

There is a clear, significant opportunity to help millions of people switch how they travel each and every week. Millions of people are open to switching some of their journeys out of the car to public transport or active travel, and government, local authorities and public transport companies can make that an easy and simple choice.

Doing it in the right way can reduce costs, emissions and congestion across the country whilst improving health and wellbeing, and mean that private journeys on our road network are those that are essential and not just the default method. Journey switching will not happen on the scale or pace we want without action, and in this report we have laid out what it could achieve and how to do it in a way which works for communities and commuters along with decision makers. We do not need everyone to switch every journey they make, but each change will have a real impact on bills, emissions and congestion.

It is clear that if action is taken in isolation that makes car use more difficult without making it easier to use other modes of transport, communities will not benefit. Instead, the same number of people will pay more to use less of our road network, clogging up roads more and leading to greater noise and air pollution. A balanced approach is critical to help reap the full benefits to our communities, families and the economy, and ensure that people are not left frustrated by local authorities and government.

As well as adopting a balanced approach that discourages car use where possible and encourages other modes of transport, good communication from policy makers is key. This will drive understanding among residents and avoid significant opposition in communities. The decisions taken affect communities in a real and meaningful way and it is critical we set out how the change will benefit them and addresses their concerns.

As local authorities consider how they can help their communities make the switch, we believe there are three principles that must guide decision making.

1. A balanced approach

Policies need to be blended to make other modes of transport accessible, affordable and convenient. This avoids penalising people for making journeys and helps justify costs that policies such as clean air zones have on communities.

2. Communication is key

Residents need to know that authorities are taking a balanced approach and how measures link together. When developing policy propositions, authorities must devote time to creating clear ways of communicating how interventions work together and deliver the outcomes residents want. Part of this must be about the way we discuss policies and the names we give them.

3. Recognise hesitancy

Whilst most people are open to switching journeys, that doesn't mean they will do it without encouragement. Policy interventions alone can penalise people and leave them far worse off. Local authorities must address the reasons why people have not switched journeys, working with public transport operators to get the network ready to meet these challenges.

Recommendations

As authorities are guided by the principles set out, we also believe that specific action must be taken to help achieve a meaningful switch. We believe these are as follows:

1.

Central government must reaffirm support for policies that encourage residents to switch their journeys if it increases affordability, reduces their emissions and helps create nicer and more liveable communities.

3.

Local authorities should make clear commitments to act to help residents switch from car journeys to other modes of transportation.

5.

Local authorities should devote communication resources to setting out the link between any policy initiatives and the positive link it has in funding other initiatives. For example, workplace parking levies subsidising bus fares.

7.

Public transport operators should continue to develop and invest in sustainable bus networks, working with their local authorities to ensure buses are convenient and meet the needs of local residents.

2.

Central government should encourage local authorities to set out plans to help people switch car journeys for other modes of transport, particularly where a car is not essential.

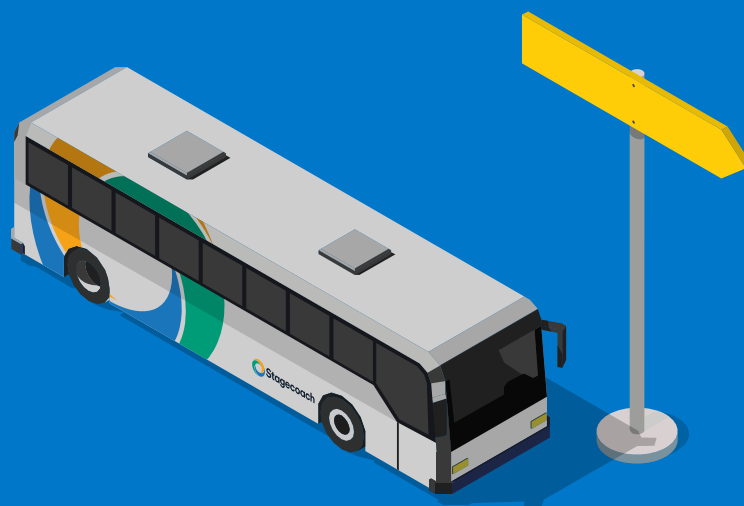
4.

Local authorities should begin discussions now with public transport companies to identify long term, sustainable ways of maintaining low bus fares to ensure that they remain attractive and affordable.

6.

Central government and local authorities should explore other options to make public transport networks attractive to residents to help soften the impact of switching approaches.

Stagecoach is ready to help support the switch and work with government and local authorities to make it happen.



References

1. Calculations assume driving costs of £0.1718 per mile for fuel and £0.02 per mile for tyres. Based on our survey data, the household is assumed to drive 240.7 miles per week, across eight commute journeys (four per adult), four school run journeys, three shopping journeys, three personal journeys, and three social journeys. We assume £5 parking charges for the eight commutes and six of the nine personal, shopping, or social journeys. Weekly costs of driving a car for all journeys are thus £41.35 for fuel, £4.81 for tyres, and £70 for parking, adding to £116.16 per week or £6,032 per year.
2. Based on a fully-grown tree absorbing 21 kilograms of CO₂ per year, per: "How much CO₂ does a tree absorb", Viessmann, <https://www.viessmann.co.uk/heating-advice/how-much-co2-does-tree-absorb#:~:text=A%20typical%20tree%20can%20absorb,around%20a%20tonne%20of%20CO2>.
3. The number of car miles that can be saved is based on the introduction of a clean air zone, the most impactful policy intervention we tested. For each journey, we calculated the number of miles respondents currently drive per week on average, then scaled this up to arrive at UK-wide figures (assuming 78% of UK adults drive a car, based on our survey data). The sample was then asked how often they would make that journey by car if a specific policy intervention were made. For each intervention tested, the total miles driven by the proportion who would 'never' drive were reduced by 90%, the miles driven by the proportion who would drive 'much less often' were reduced by 60%, the miles driven by the proportion who would drive 'slightly less often' were reduced by 20%, and the miles driven by the proportion who would drive 'at least as often as I currently do' were not reduced. The results were, by intervention, figures of total miles that would be reduced across the UK for each of the journey types, which were then summed for an overall figure.
4. "The Decarbonisation Dividend: The economic, environmental and social benefits of more bus and coach journeys", CPT, <https://www.cpt-uk.org/campaigns-reports/the-decarbonisation-dividend/>
5. Based on our survey data, the household is assumed to drive 240.7 miles per week, across eight commute journeys (four per adult), four school run journeys, three shopping journeys, three personal journeys, and three social journeys.

For shopping, personal, and social journeys respectively, we assume two of journeys are made by one adult on their own and the other is made with the two adults together in the car.

We assume driving costs of £0.1718 per mile for fuel and £0.02 per mile for tyres, and £5 parking charges for the eight commutes and six of the nine personal, shopping, or social journeys.

Weekly costs of driving a car for all journeys are thus £41.35 for fuel, £4.81 for tyres, and £70 for parking, adding to £116.16 per week or £6,032 per year.

If all journeys are switched to public transport with a £2 bus fare per adult for each direction of the journey, we assume each week the household will pay 16 fares for commutes, eight fares for school journeys, eight fares for shopping journeys, eight fares for personal journeys, and eight fares for social journeys, adding to £96 per week or £4,992 per year.

Therefore, if all driving journeys are replaced by (free) active transport, the yearly £6,032 in driving costs can be saved. If all driving journeys are switched to public transport at the cost of £4,992 per week, £1,040 can be saved.

These costs assume the household retains the car and thus continues to pay for insurance and servicing. If the car is sold, additional savings would be made. These costs also assume the household can make all journeys by walking or already has access to bikes. If bikes must be purchased, additional costs would be incurred.
6. This and all subsequent emissions calculations are based on an average-sized petrol car emitting 291.03 grams of CO₂ equivalent per mile. CO₂ equivalent is the universal unit of measurement to indicate the global warming potential of greenhouse gases, expressed in one unit of CO₂. Per: "Greenhouse gas reporting: conversion factors 2019", UK Government, <https://www.gov.uk/government/publications/greenhouse-gas-reporting-conversion-factors-2019>.
7. "Greenhouse Gas Equivalencies Calculator", United States Environmental Protection Agency, <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator#results>.
8. Based on a fully-grown tree absorbing 21 kilograms of CO₂ per year, per: "How much CO₂ does a tree absorb", Viessmann, <https://www.viessmann.co.uk/heating-advice/how-much-co2-does-tree-absorb#:~:text=A%20typical%20tree%20can%20absorb,around%20a%20tonne%20of%20CO2>
9. Assuming 500 trees per acre.
10. Assuming an average car length of 4.5 metres. The M25 is 188km in length.
11. "INRIX 2021 Global Traffic Scorecard", INRIX, <https://inrix.com/scorecard/>.
12. Ibid.
13. Figures were derived by calculating the average distance of each round-trip journey, the average number of those journeys made per week, and the proportion of the sample who had made that journey in the past week. The data was then scaled up to represent all UK car-drivers (78% of the adult population, based on our survey data).
14. Recently published work by the Campaign for Better Transport (https://bettertransport.org.uk/wp-content/uploads/legacy-files/research-files/22.09.pay-as-you-drive-flyer_0.pdf) highlighted that 49% of people support the idea of 'pay-as-you-drive' policies after arguments for and against were discussed. This suggests that negativity towards these policies is not well entrenched.
15. Net openness scores calculated by averaging demographics' openness across all journey types; net openness = 'very'/'fairly' open minus 'not that'/'not very'/'not at all' open.
16. For each journey, we calculated the number of miles respondents currently drive per week on average, then scaled this up to arrive at UK-wide figures (assuming 78% of UK adults drive a car, based on our survey data). The sample was then asked how often they would make that journey by car if a specific policy intervention were made. For each intervention tested, the total miles driven by the proportion who would 'never' drive were reduced by 90%, the miles driven by the proportion who would drive 'much less often' were reduced by 60%, the miles driven by the proportion who would drive 'slightly less often' were reduced by 20%, and the miles driven by the proportion who would drive 'at least as often as I currently do' were not reduced. The results were, by intervention, figures of total miles that would be reduced across the UK for each of the journey types, which were then summed for an overall figure.



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