



**Transport Forum
Working Group**

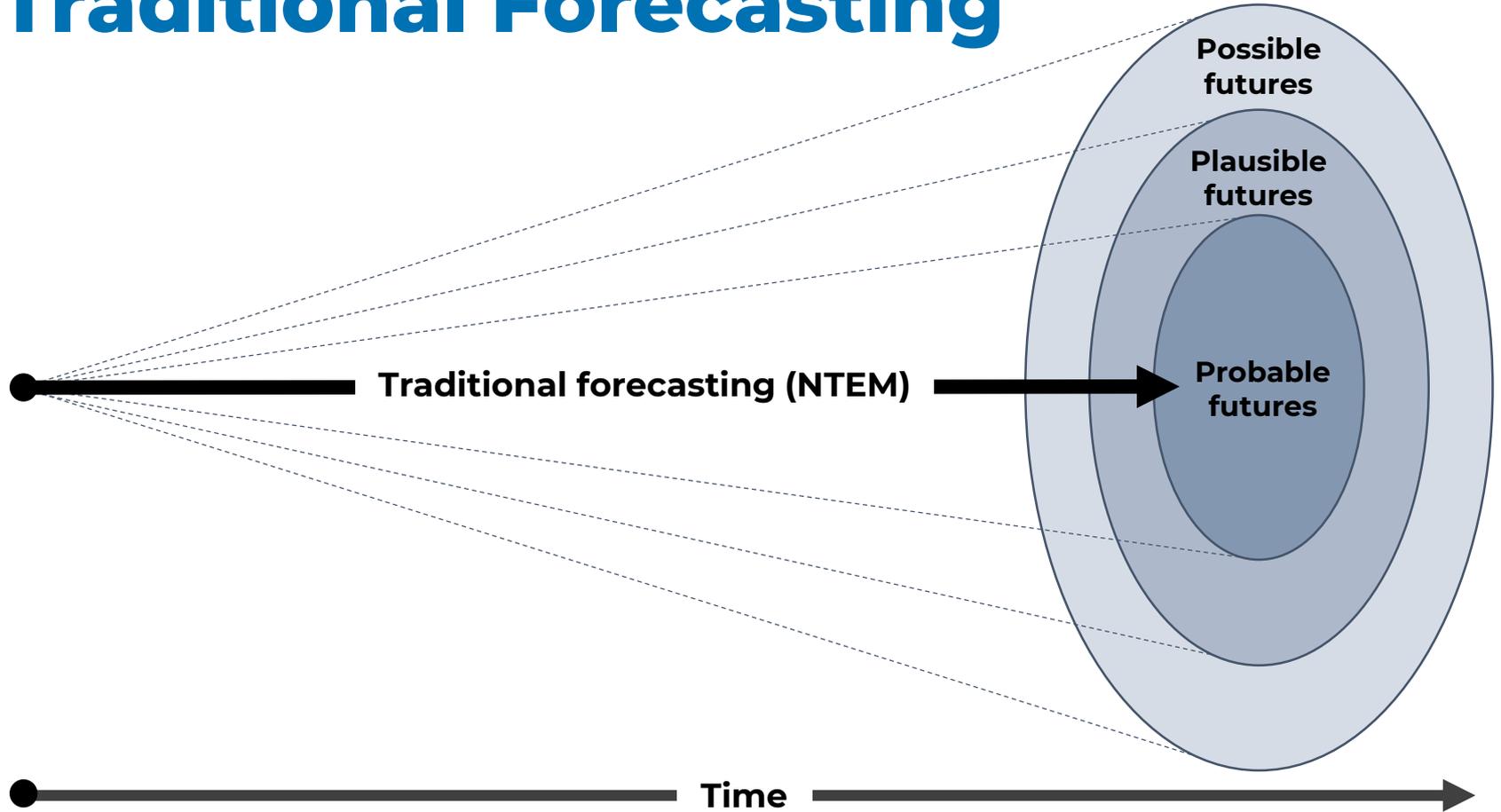
Agenda

1. Introduction
2. Freight, Logistics and International Gateways
3. Smart Ticketing
4. Future Mobility
5. Transport Strategy
6. Next Steps

Transport Strategy Development

1. Scenario development
2. Vision, objectives and priorities
3. Interventions
4. Transport Strategy document structure

Traditional Forecasting



Today

Current indicators

7.8m

Population



3.3m

Employment



£183bn

GVA

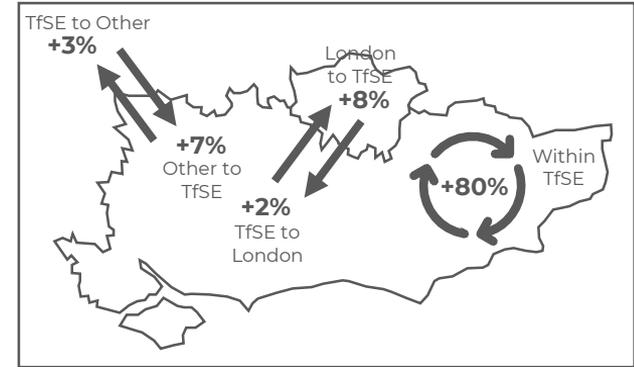


20.9m

Trips



Key flows



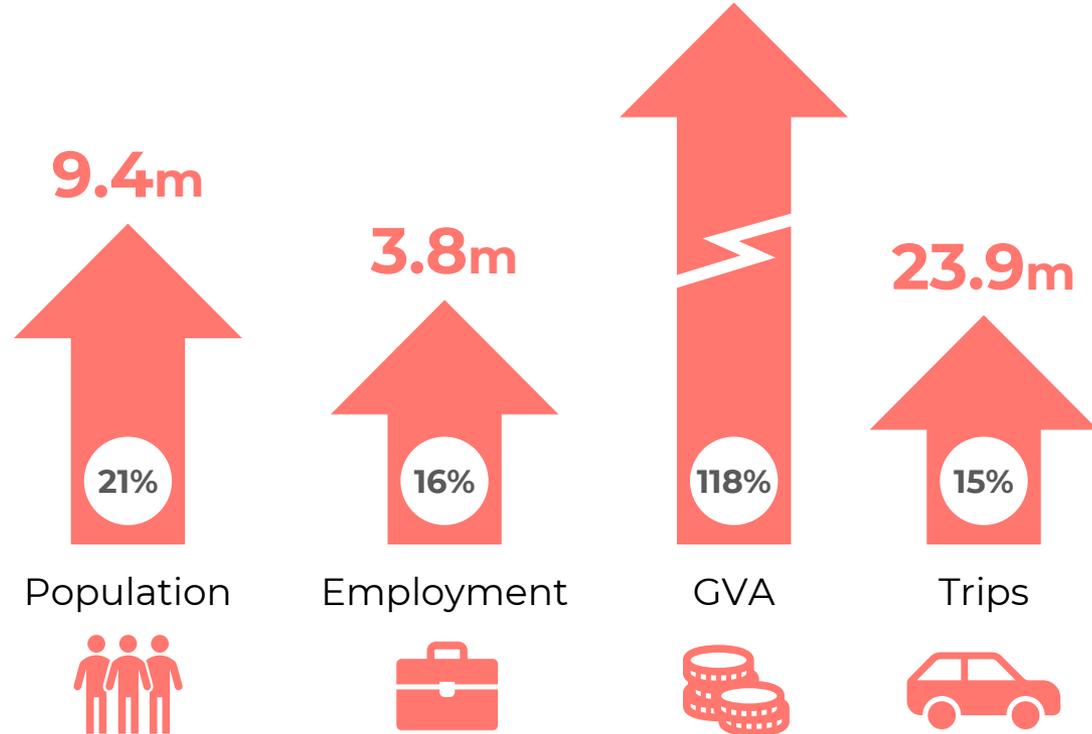
Mode Share



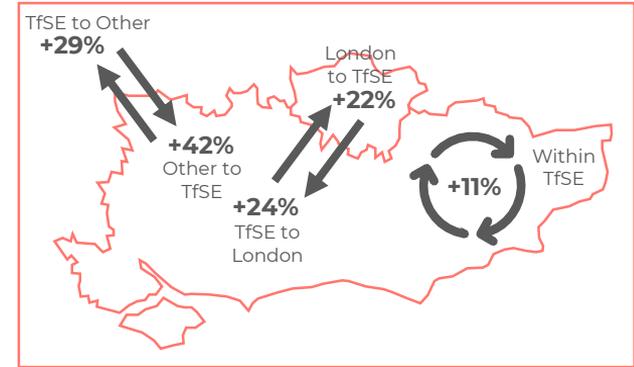
Includes walking

Business As Usual

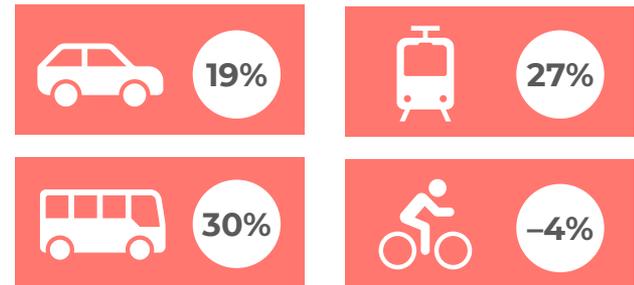
Change by key indicator



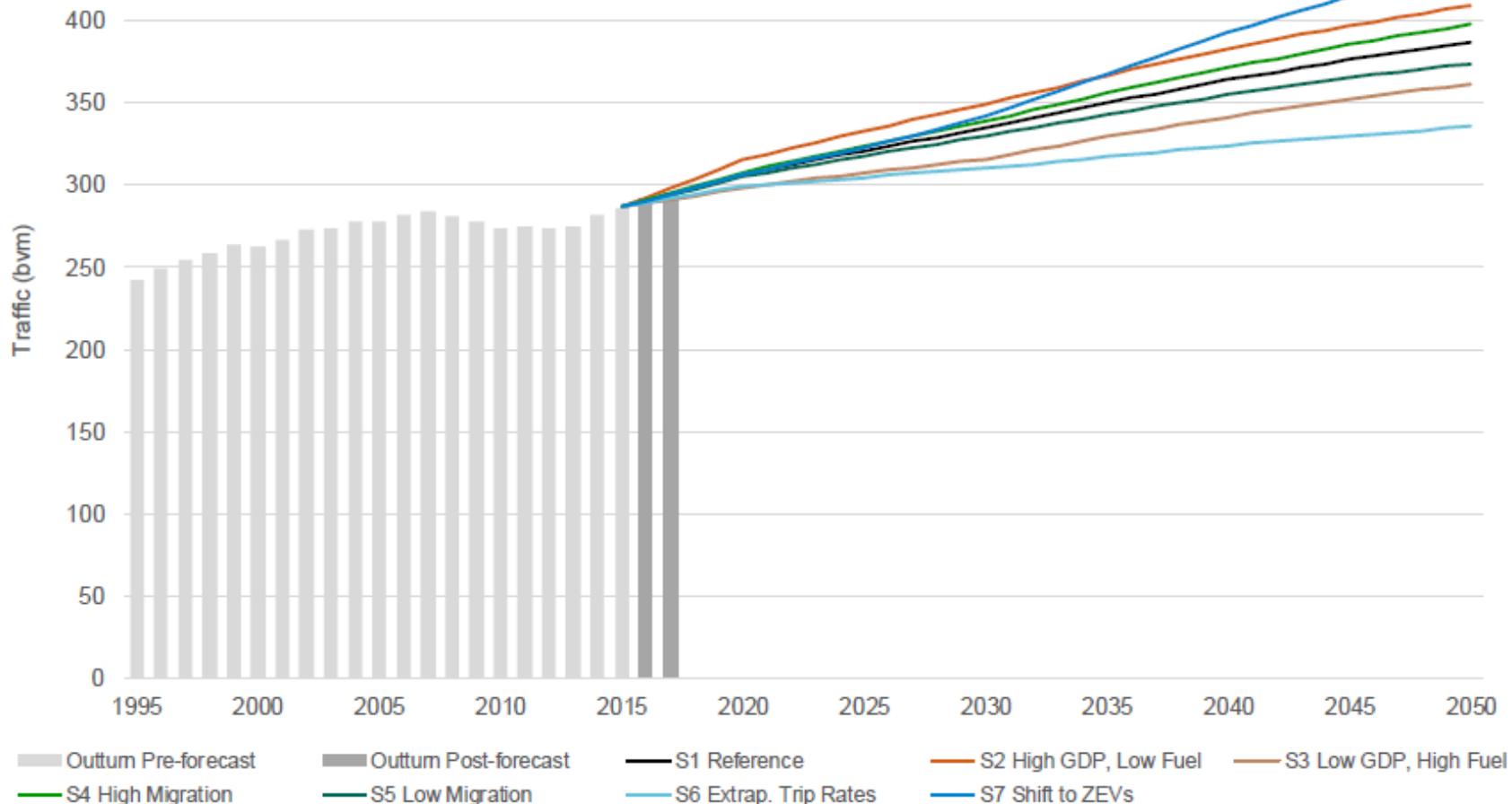
Change by movement type



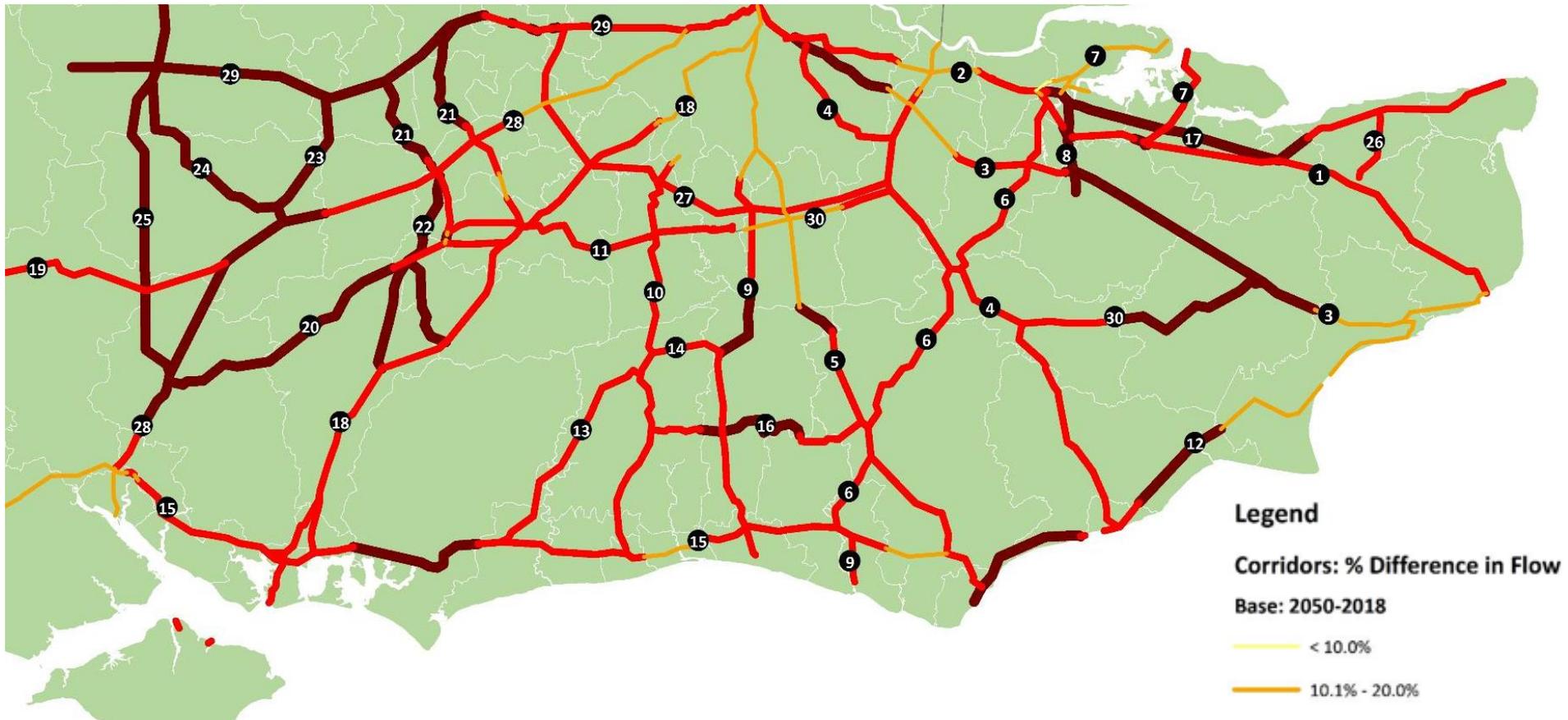
Change by transport mode



Vehicle Miles Forecasts (England and Wales)



DfT Modelling Results (2050, NTEM)



Legend

Corridors: % Difference in Flow

Base: 2050-2018

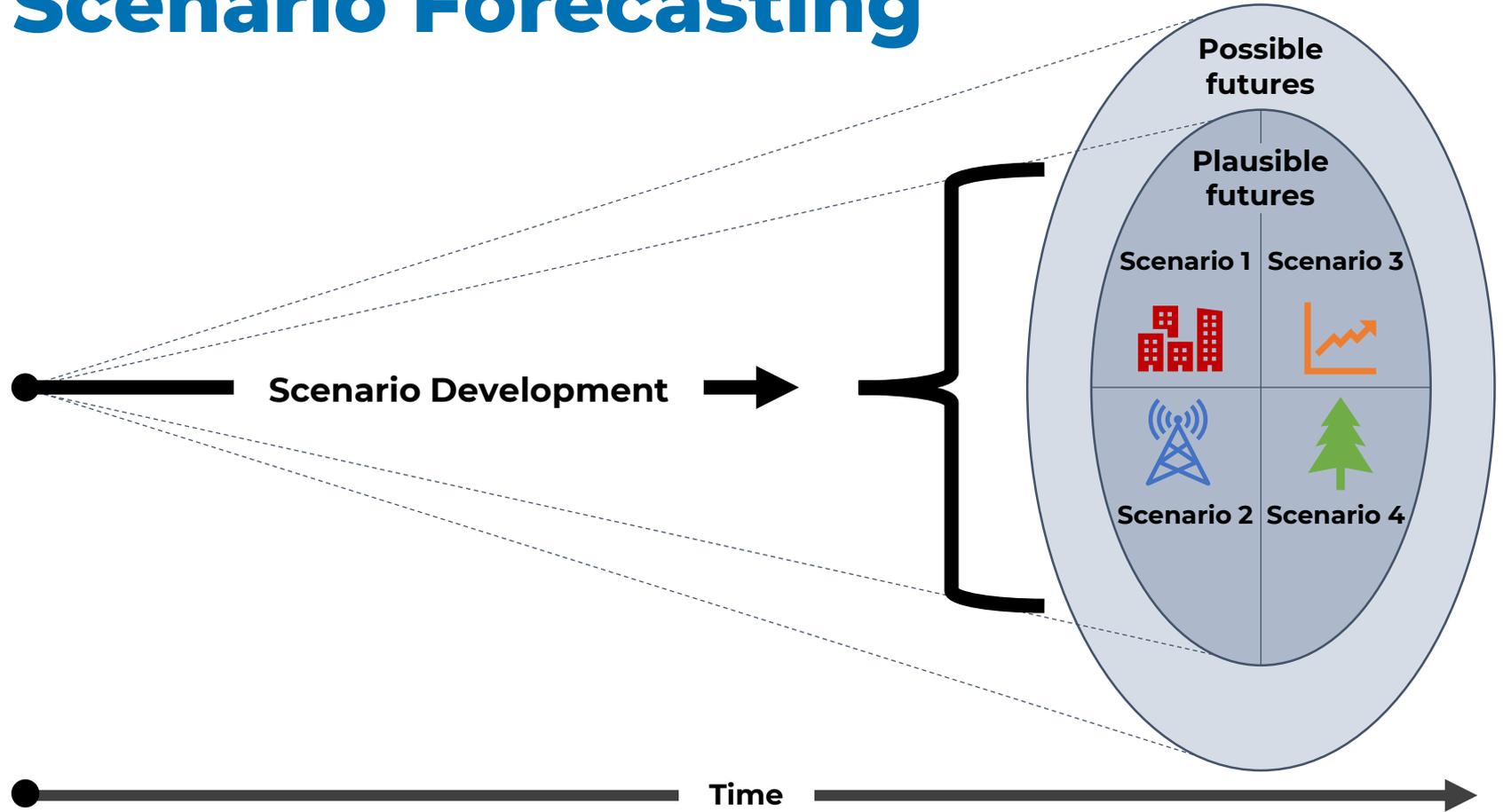
< 10.0%

10.1% - 20.0%

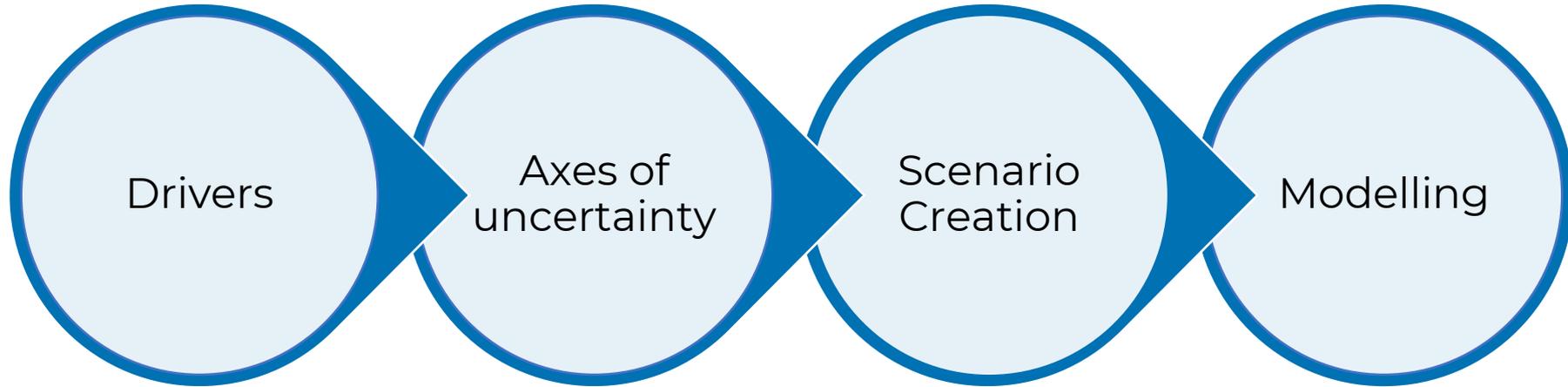
20.1% - 30.0%

> 30.0% (Max: 57.%)

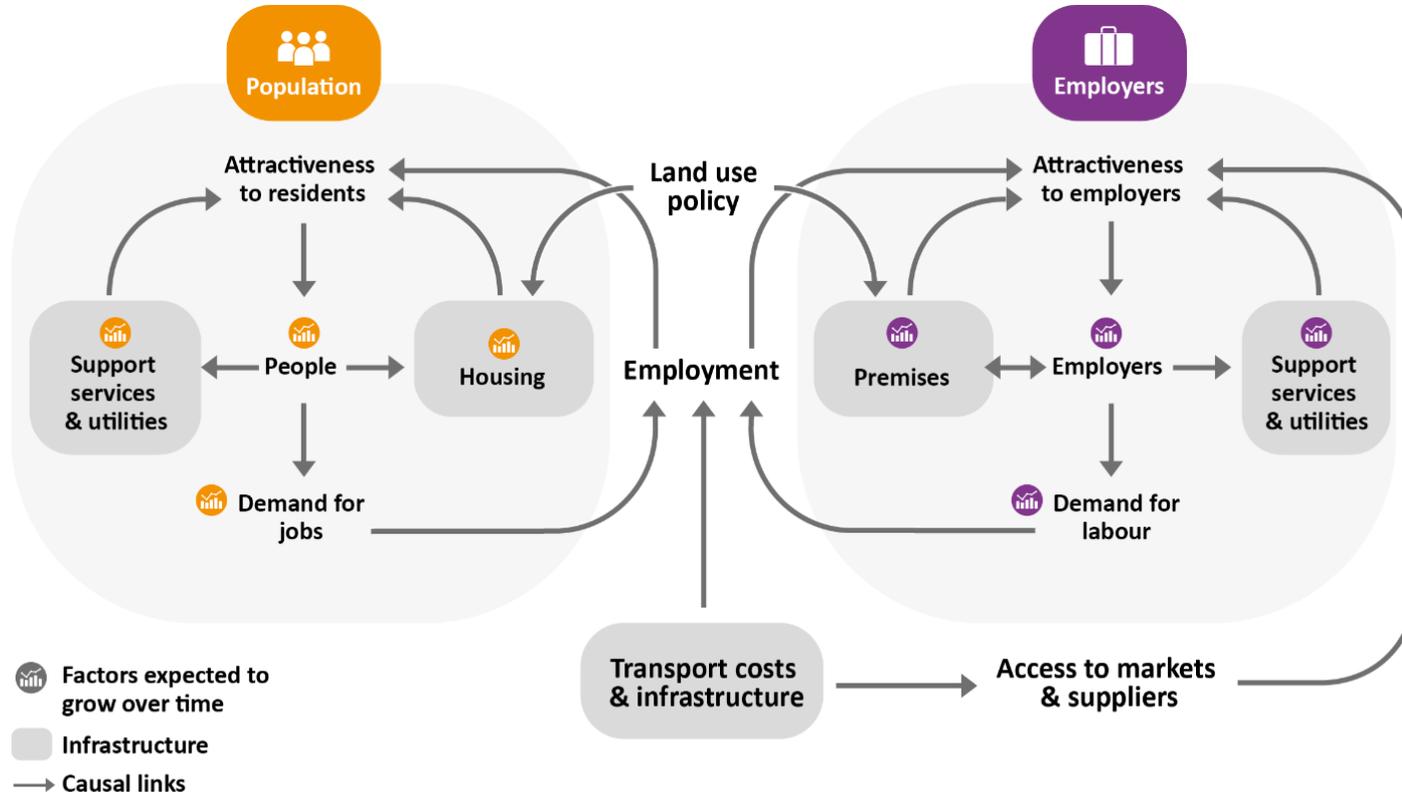
Scenario Forecasting



Scenario Forecasting Process



Transport and Land Use Model Map



Scenario 1: The London Hub

What if there is higher than expected growth in London and the South East becomes a dormitory for London?

- Higher population growth
- Increased housing stock
- Lower productivity growth
- Increased radial travel



Scenario 3: Route to Growth

What if the South East makes more of its unique assets, becoming more specialised and locally focussed?

- More local employment
- Growth of priority sectors
- Slightly higher population growth
- Increased cross-regional travel



Scenario 2: Digital Future

What if digital transformation happens at a much faster rate than anticipated?

- Convenience driven tech-solutions
- Highly productive economy
- Labour market disruption
- Less need for business travel
- Faster adoption of CAVs



Scenario 4: Sustainable Future

What if there is an increased focus on environmental sustainability?

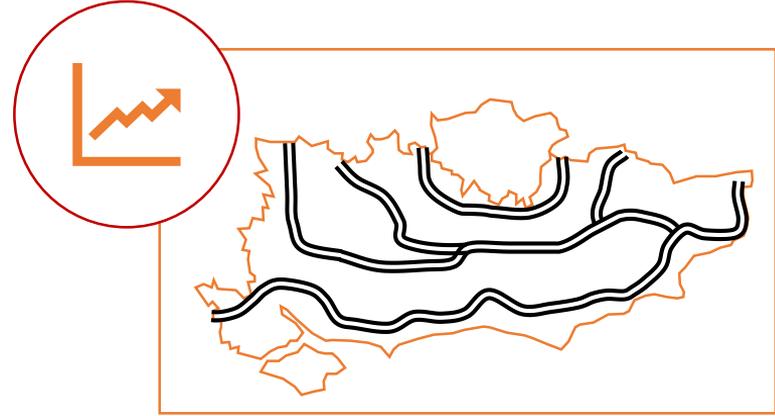
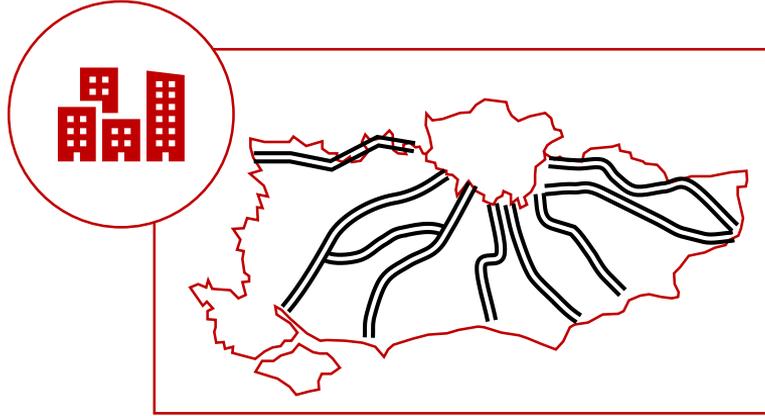
- Lower levels of productivity-led growth
- Shift away from heavy industry
- Focus on protecting the environment
- Reduced inequality – focussing on deprived communities
- National road user charging



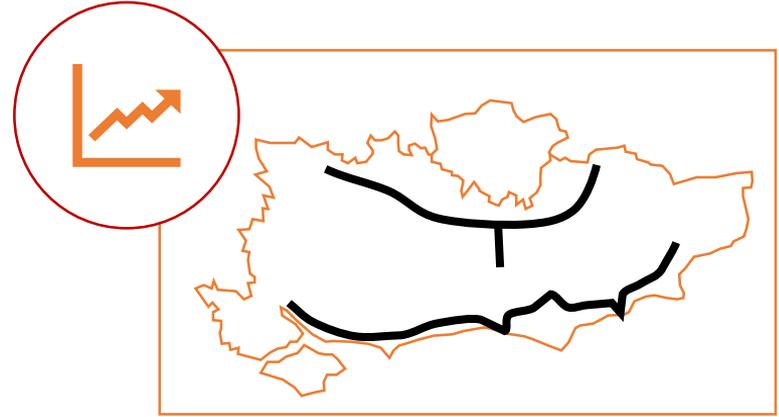
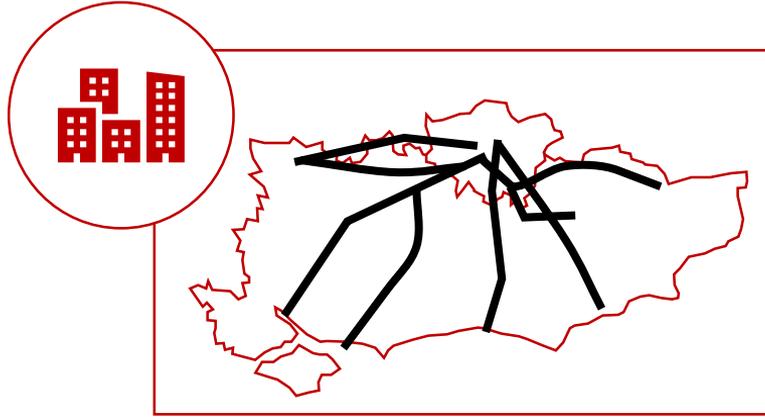
Scenario Characteristics

| Scenario | Key principle | Supported by | |
|--|----------------------|--|---|
|  | Radial travel | Rail metro-isation Access to rail | Commuter rail quality Road capacity |
|  | CAV network | No policy constraints on CAV/MAAS | Pedestrianised urban centres |
|  | Orbital travel | Improved orbital road Improved orbital rail | High quality urban transit |
|  | Demand management | Road pricing Road space reallocation | Public Transport subsidies Better bus services |

Scenario Interventions – Road



Scenario Interventions – Rail





London Hub

Change by key indicator
compared to Business As Usual



Population



Employment



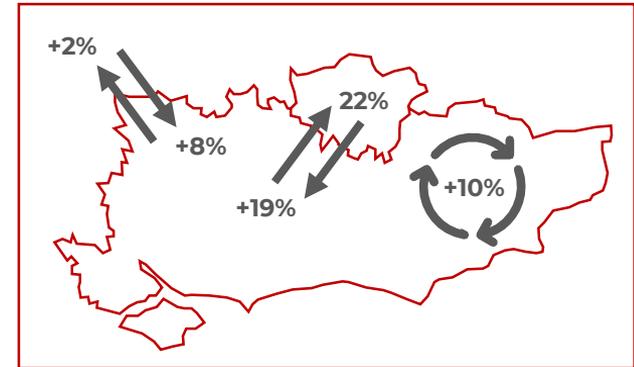
GVA



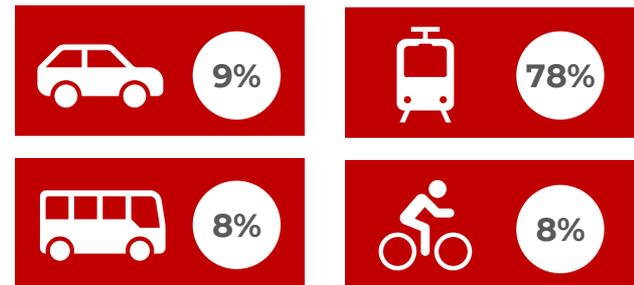
Trips



Change by movement type



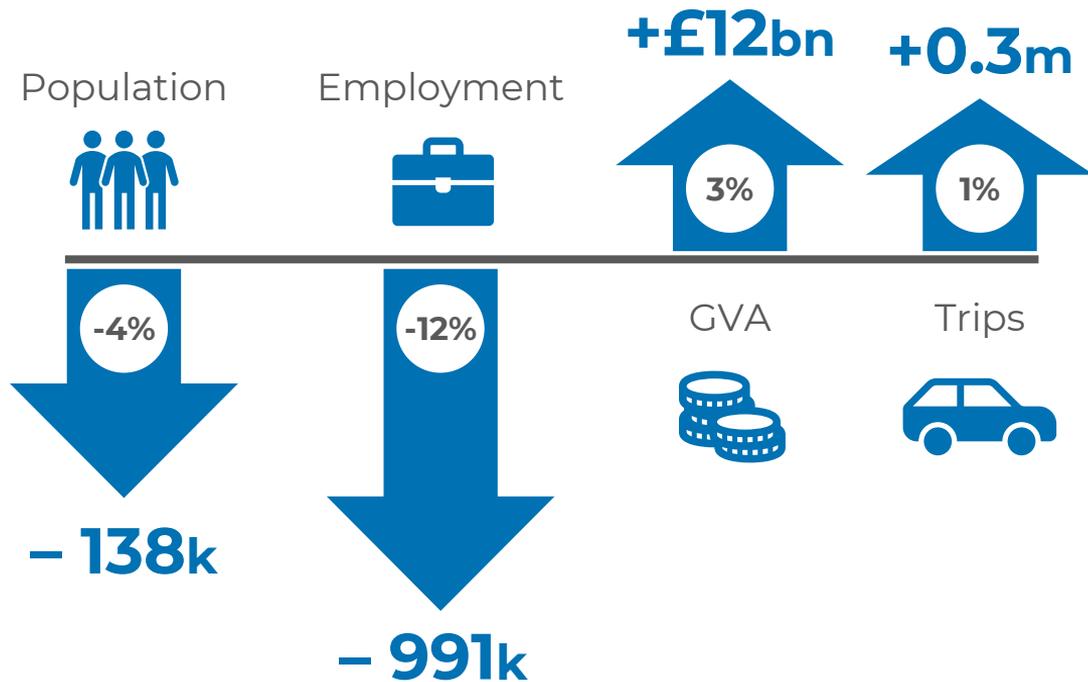
Change by transport mode



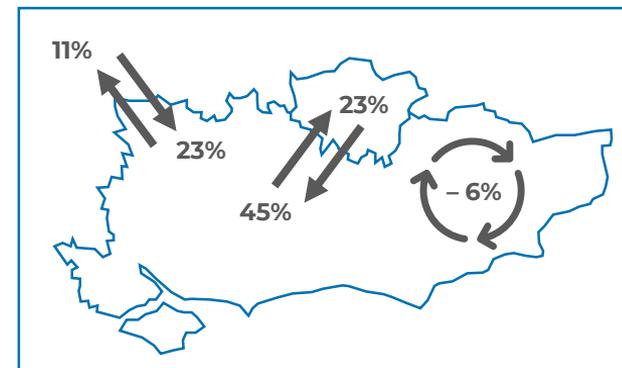


Digital Future

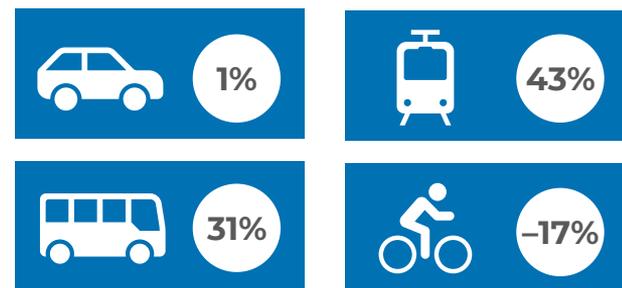
Change by key indicator
compared to Business As Usual



Change by movement type



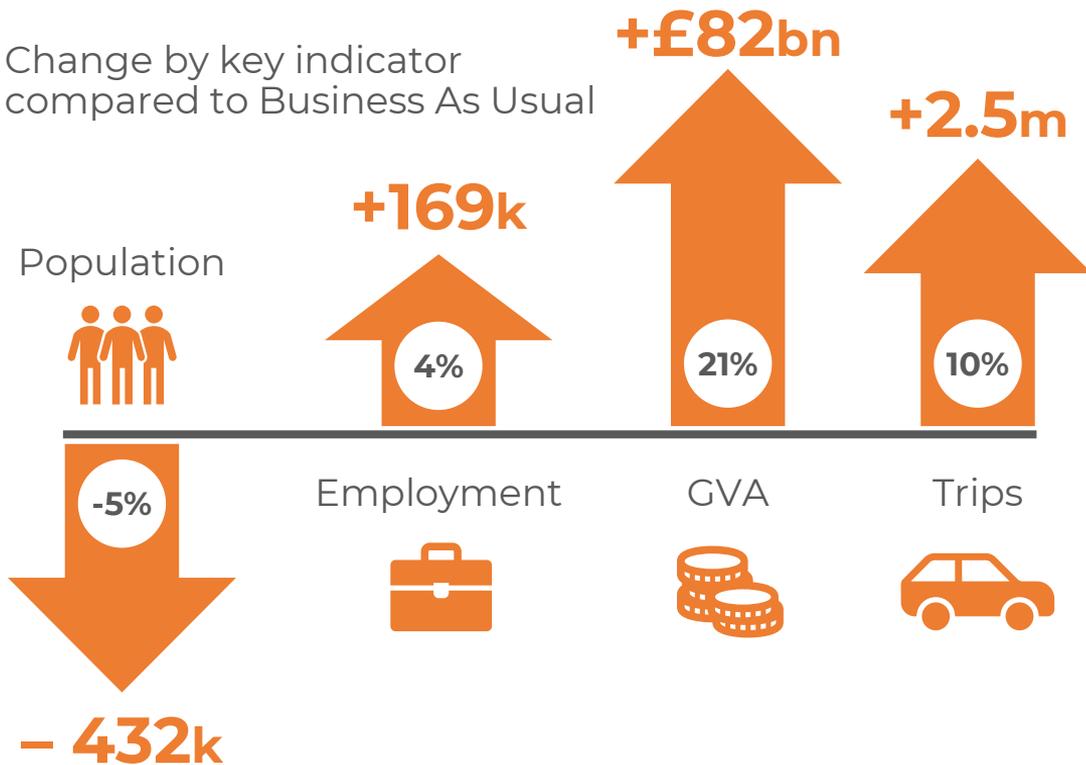
Change by transport mode



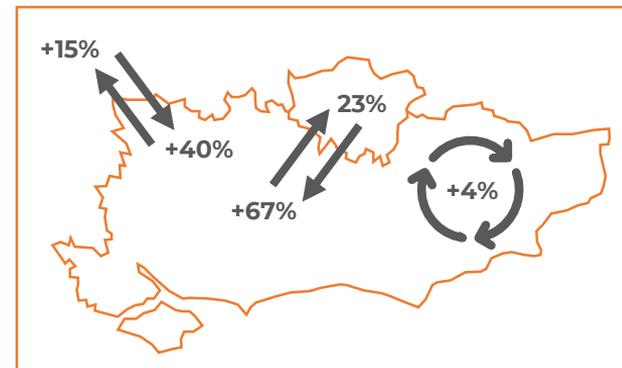
Route to Growth



Change by key indicator
compared to Business As Usual



Change by movement type



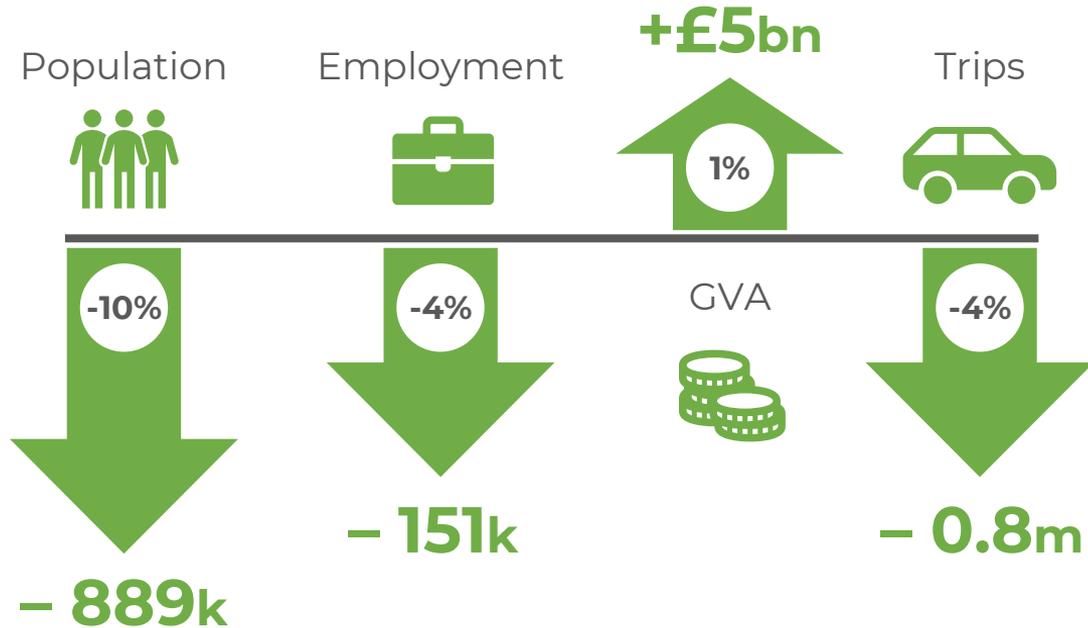
Change by transport mode



Sustainable Future



Change by key indicator compared to Business As Usual



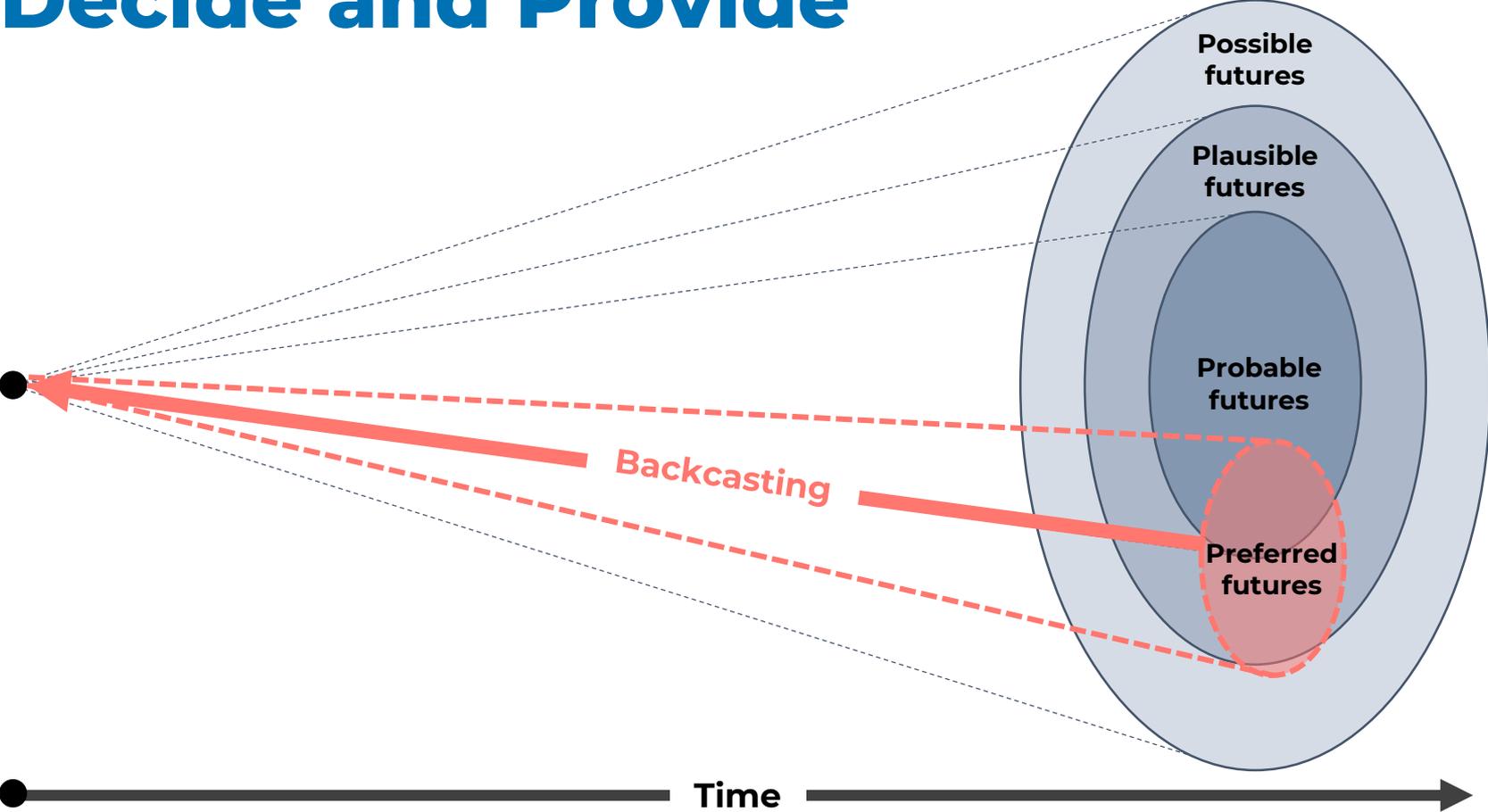
Change by movement type



Change by transport mode



Decide and Provide



Possible
futures

Plausible
futures

Probable
futures

Preferred
futures

Backcasting

Time

Scenario 1: The London Hub

What if there is higher than expected growth in London and the South East becomes a dormitory for London?

- Higher population
- Increased housing
- Lower productivity
- Increased radial tr

Scenario 3: Route to Growth

What if the South East makes more of its unique assets, becoming more specialised and locally focussed?

- Higher population
- Increased housing
- Lower productivity
- Increased radial tr

Scenario 2: Digital

What if digital transform
much faster rate than

- Convenience drive
- Highly productive economy
- Labour market disruption
- Less need for business travel
- Faster adoption of CAVs

Scenario 4: Sustainable Future

What if the South East
based focus on
sustainability and
resilience?

- Productivity-led growth
- Sustainability industry
- Focus on protecting the environment
- Reduced inequality – focussing on deprived communities
- National road user charging



A Sustainable Route to Growth



Scenario 1: The London Hub

What if there is higher than expected growth in London and the South East becomes a dormitory for London?

- Higher population
- Increased housing
- Lower productivity
- Increased racial

Scenario 3: Route to Growth

What if the South East makes more of its unique assets, becoming more specialised and locally focussed?

A Sustainable Route to Growth



Scenario 2

What if digital grows much faster than the economy?

- Convergence
- Highly productive economy
- Labour
- Focus on protecting and enhancing the environment
- Less need for business travel
- Faster adoption of CAVs



- National road pricing
- Faster adoption of digital technology and CAVs
- Less need for business travel
- Increased cross-regional travel
- Reduced inequality – focussing on deprived communities
- National road user charging



Vision, goals and priorities

Vision



Strategic Goals



Strategic Priorities



Interventions



Describes our preferred future



Describes the goals we need to achieve to realise our preferred future



The mechanisms and outcomes required to achieve our goals



Describes the interventions (schemes and policies) we support to implement our strategy

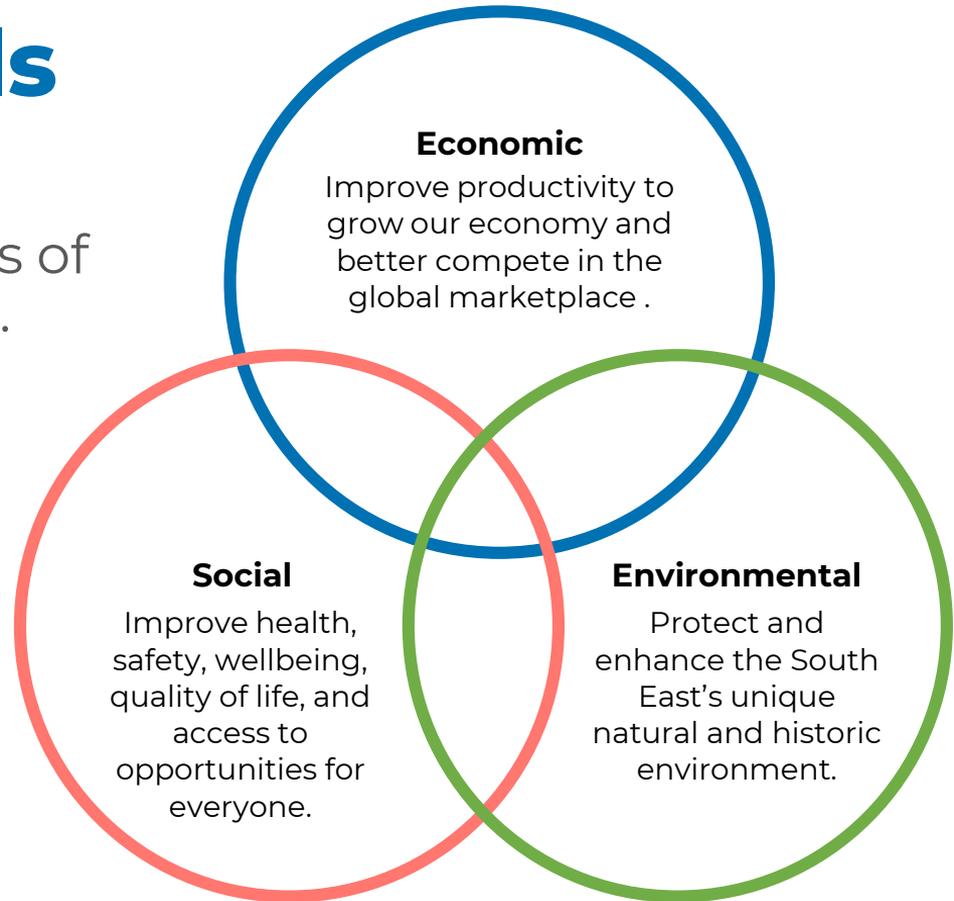
Our Vision

A Sustainable Route to Growth

“We will grow the South East’s economy by facilitating the development of a reliable, high quality, sustainable, integrated transport system that makes the region more productive and competitive, improves access to opportunities for all and protects the environment.”

Strategic Goals

The Strategic Goals are aligned to the three pillars of sustainable development.



Priorities

Economic



Connectivity & journey times



Reliability



Resilience



Integrated planning



Digital & travel demand management

Social



Health, wellbeing & quality of life



Air quality



Affordability & accessibility



Integration



Safety

Environmental



Zero Carbon



Reduced need for travel (especially car)



Protected and enhanced environment



Biodiversity net gain



Minimal resource consumption

Vision

We will grow the South East's economy by facilitating the development of a reliable, high quality, sustainable, integrated transport system that makes the region more productive and competitive, improves access to opportunities for all and protects the environment.

Strategic Goals

Economic

Improve productivity and attract investment to grow our economy and better compete in the global marketplace.

Social

Improve health, safety, wellbeing, quality of life, and access to opportunities for everyone.

Environmental

Protect and enhance the South East's unique natural and historic environment.

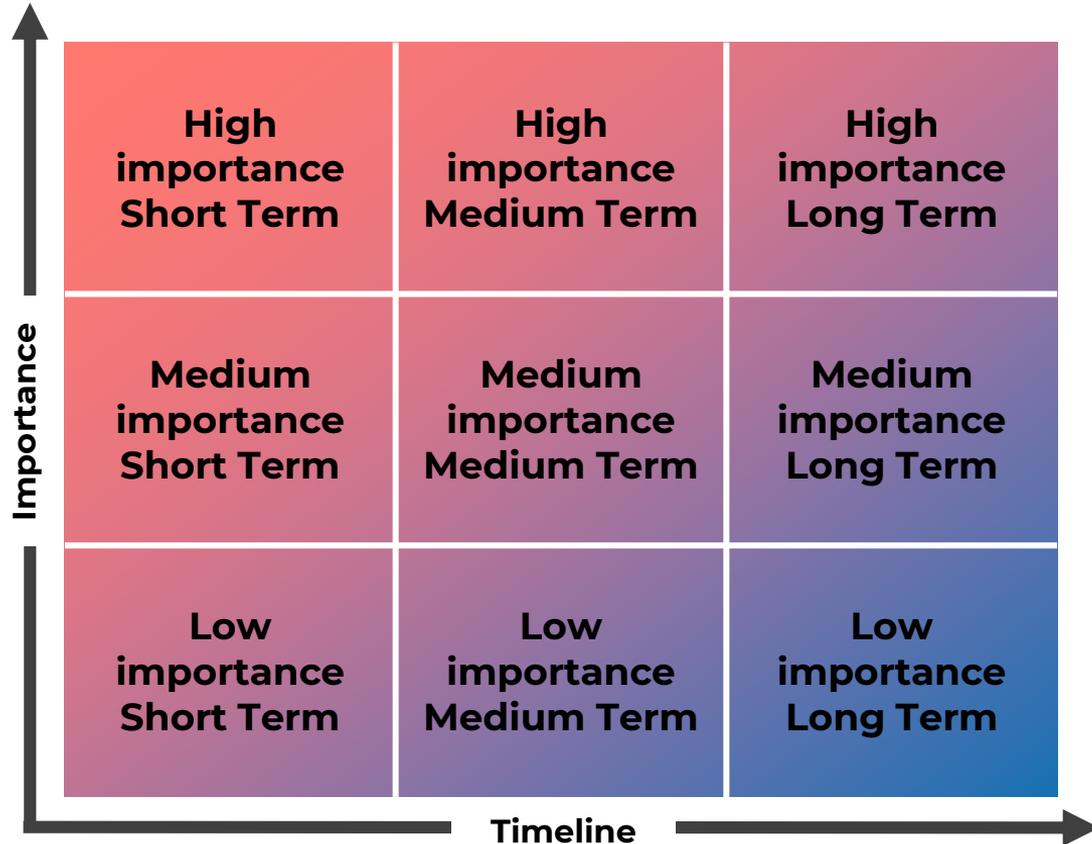
Strategic Priorities

- Better **connectivity** between our major economic hubs, international gateways (ports, airports and rail terminals) and their markets.
- More **reliable** journeys for people and goods travelling between the South East's major economic hubs.
- A transport network that is more **resilient** to incidents, extreme weather and the impacts of a changing climate.
- A new **approach to planning** that helps our partners across the South East meet future housing, employment and regeneration needs sustainably.
- A 'smart' transport network that uses digital technology to **manage transport demand**, encourage shared transport and make more efficient use of our roads and railways.

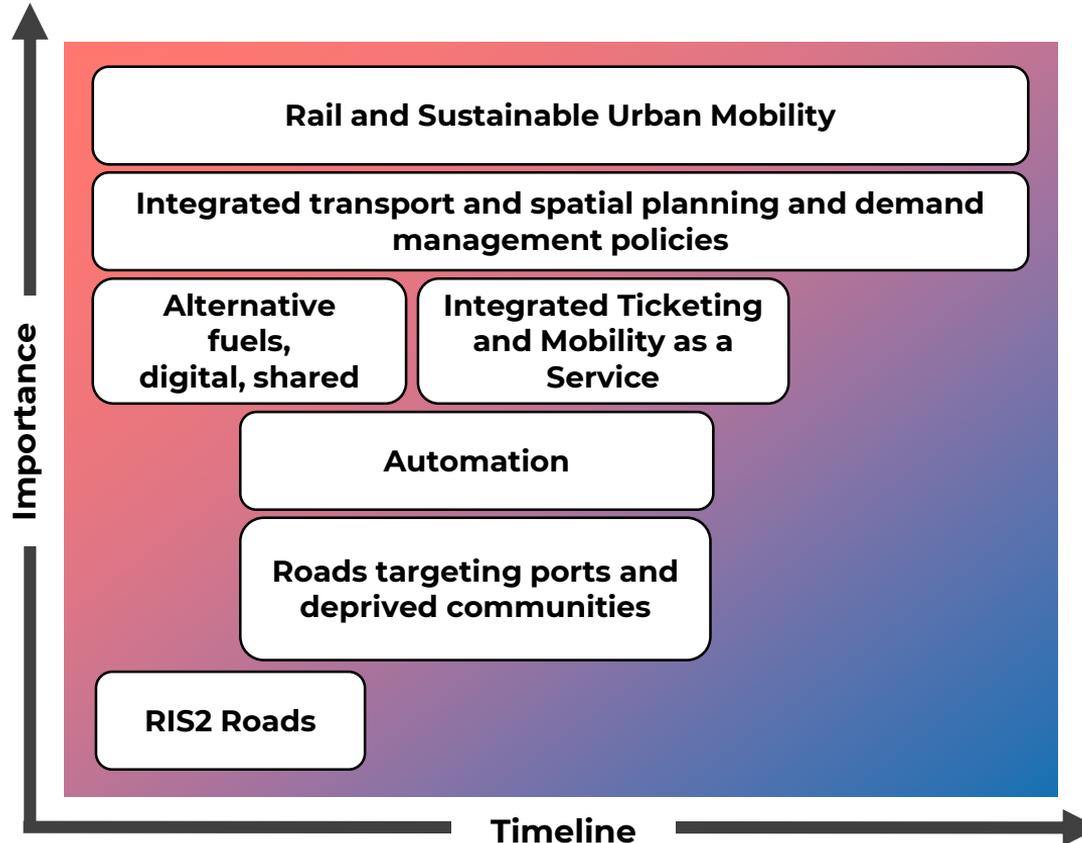
- A network that promotes active travel and active lifestyles to improve our **health and wellbeing**.
- **Improved air quality** supported by initiatives to reduce congestion and encourage further shifts to public transport.
- An **affordable, accessible transport network** for all that promotes social inclusion and reduces barriers to employment, learning, social, leisure, physical and cultural activity.
- A **seamless, integrated transport network** with passengers at its heart, making journey planning, paying for and using different forms of transport simpler and easier.
- A **safely planned, delivered and operated transport network** with no fatalities or serious injuries among transport users, workforce or the wider public.

- A **reduction in carbon emissions** to net zero and minimise the impact of transport and travel on climate change.
- A **reduction in the need to travel**, particularly by private car, to reduce the impact of transport on people and the environment.
- A transport network that **protects and enhances our natural, built and historic environments**.
- Use of the principle of '**biodiversity net gain**' in all transport initiatives.
- **Minimisation of transport's consumption** of resources and energy.

Interventions



Interventions



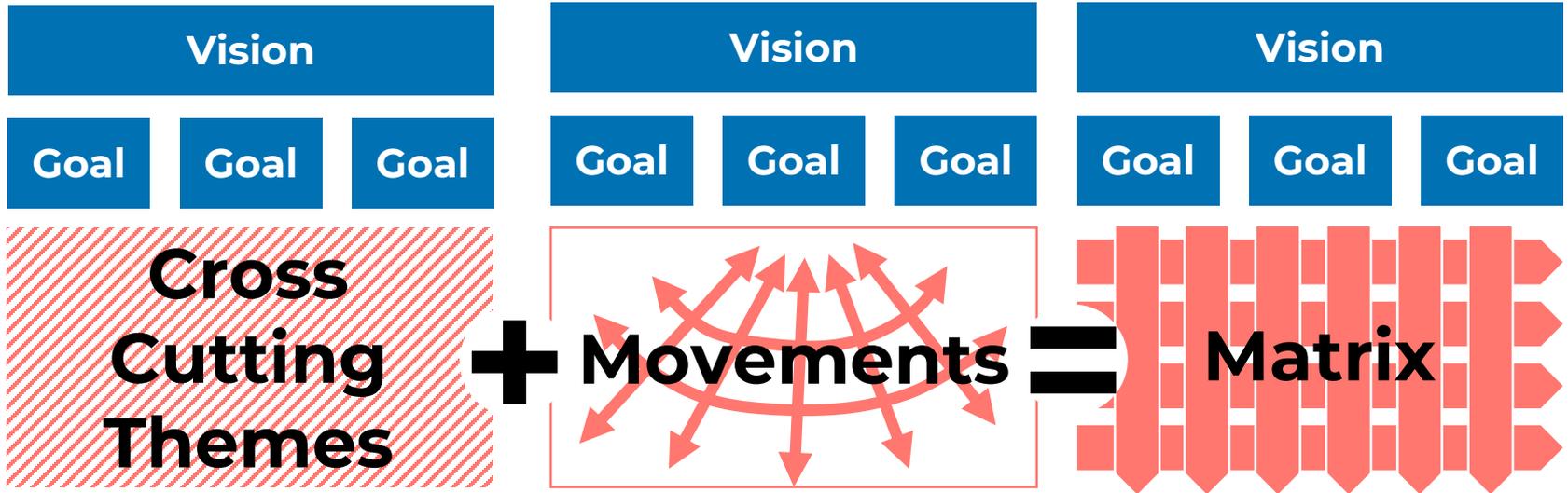
Transport Strategy Structure

There are several ways we can structure our Strategy

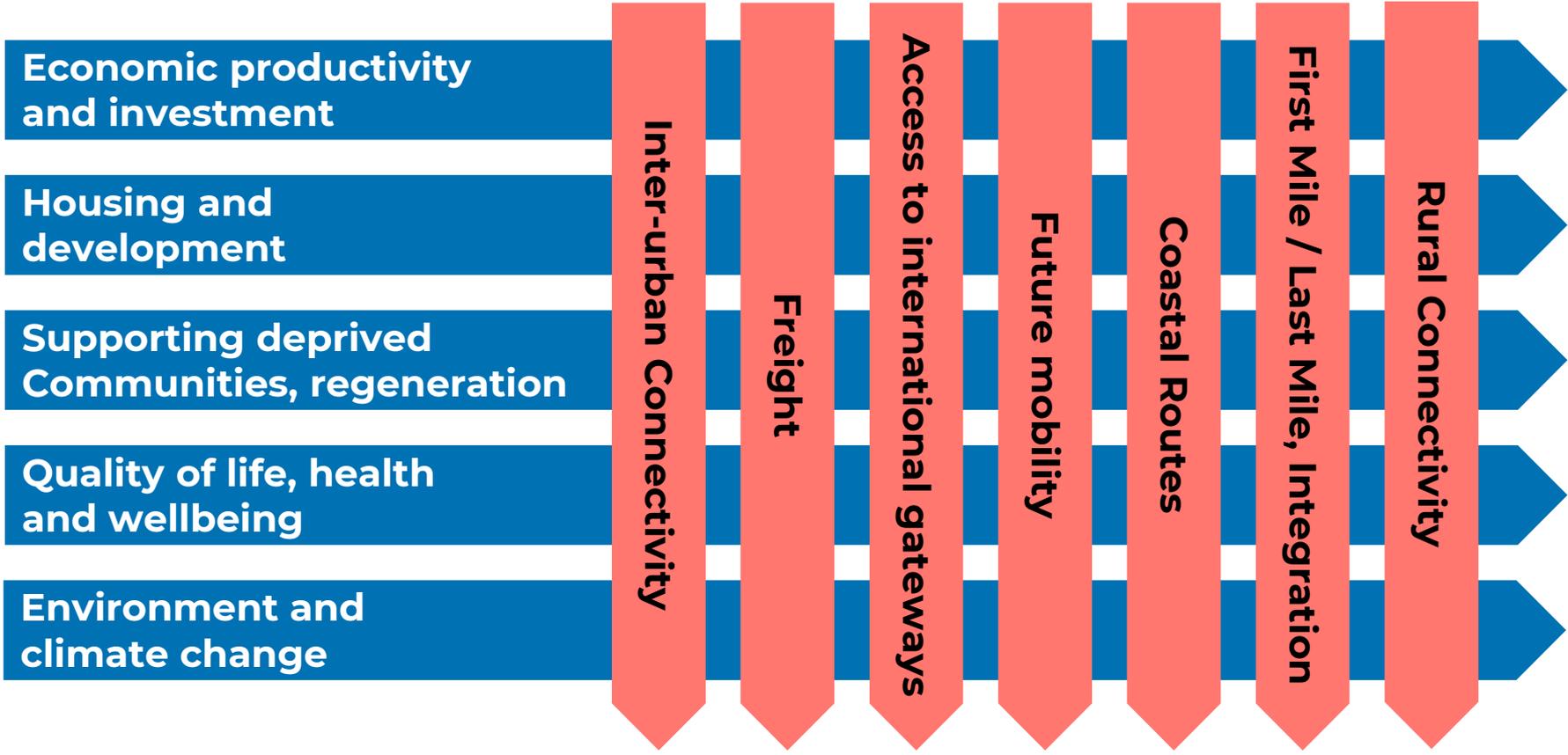


Transport Strategy Structure

There are several ways we can structure our Strategy



Matrix Example



Next Steps

TO BE COMPLETED



Thank You