

Future Travel Scenario narratives summary

Future Scenario 1 – Just about managing

This scenario sees a state of inertia, although this should not be taken as neutral. This scenario is led by markets, without much increase in political direction, with its biggest driver being economic. Key aspects:

- Existing trend of urbanisation and growth distribution continues. Little change in demographics and travel behaviour seen today.
- Modest technology uptake, widespread growth in electric vehicles and some autonomy. Net Zero 2050 target not met - climate change and travel disruption becomes more extreme.
- Moderate growth in remote working. Continuation of freight transportation as seen today.
- No transformation in level of economic growth. Reactive political direction results in a rigid economy, lacking agility and vulnerable to economic shocks.

Future Scenario 2 – Prioritised Places

This scenario sees the UK significantly shifting the political and economic direction to ensure that no place is left behind. Every area, including cities, towns and rural and coastal areas, has a bespoke local economic strategy, supported by investment in local assets and economic and social infrastructure. This scenario is led by a change in priorities, with its biggest driver being the push for a fairer redistribution of economic prosperity. Key aspects:

- Bespoke local strategies, focusing on quality of life, place-making and community, rather than primarily economic growth. Slower growth in cities, more in towns and rural/coastal areas.
- Moderate growth in electric vehicles and some autonomy, especially in cities.
- Continued private mobility ownership sees a struggle to realise a zero-emission transport network.
- More active and public transport within communities. People value face to face interaction.
- No transformation in level of economic growth. Fairer distribution of prosperity.
- Focus on work-life balance and social equity within and between places.

Future Scenario 3 – Digitally Distributed

This scenario sees a future where digital and technological advances accelerate, transforming how we work, travel and live. In general, we embrace these technological changes and the move towards a distributed, service-based transport system. This scenario is led by technology, with the biggest drivers being technical advances and a willingness to embrace mobility-as-a-service and shared mobility. Key aspects:

- Growth dispersed between cities and towns and less city-centric.
- High uptake of EV, ULEV's and driverless vehicles means target of zero emissions before 2050 is met (but slow progress in short term). Some fiscal and regulatory action to influence technology use, but congestion persists in places and opportunities not available to all.
- Increased digital remote working and dispersed employment > trip lengths are longer but less often. Willingness to embrace MaaS and shared mobility - through technology acceptance. Increase in road capacity. Freight warehousing distributed.
- Transformational economic growth as towns and cities become more interdependent.

Future Scenario 4 – Urban Zero Carbon

This scenario sees a significant shift in public attitudes towards action on climate change, and a strong Government response to meet it. This scenario is led by attitudes to climate action and urban place-making, with the biggest drivers being strong Government policy and urban densification. Key aspects:

- Cities and large towns become more dense but attractive places to live. Large rural settlements may benefit, others will see reduction in population and employment without support of national policy.
- Strong fiscal and regulatory action set us on pathway to zero carbon before 2050. Increased devolution leads to integrated transport and energy systems which deliver clean networks.
- Urban living reduces remote working and increases freight consolidation centres. Increased public and active transport, including shared mobility as public and private travel becomes blurred.
- Transformational economic growth primarily through urban agglomeration and place-making.