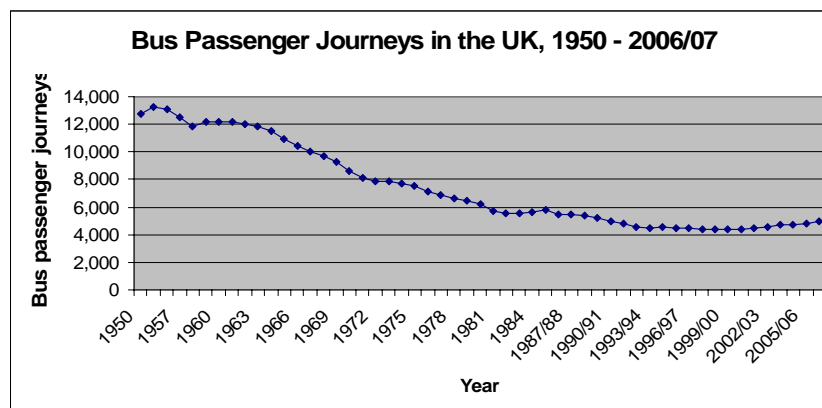


# Sustainable Transport

## An Operators Perspective

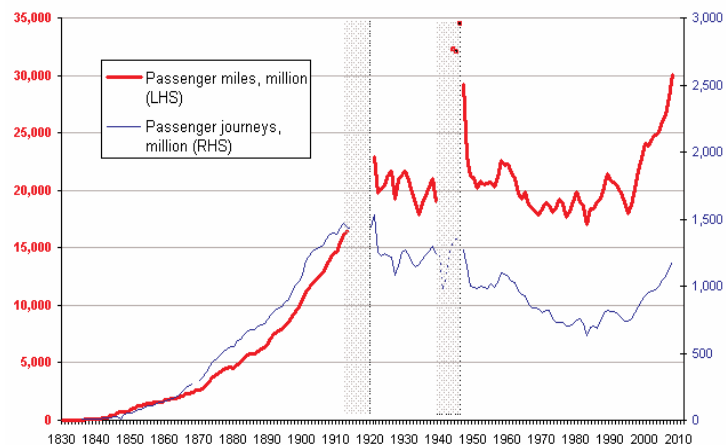
Ian Dobbs  
Chief Executive, Rail  
Stagecoach Group plc



## UK Bus

- Growing in last 8/10 years for the first time ever?
- Bus fleets increasingly “clean”
- Alternative fuels and additives continually under test
- Cleaner & greener
- Significant growth in London
- Substantial growth in shire towns with partnership working

The Passenger Railway since the beginning -  
Passenger Miles and Journeys



## UK Rail

- 2007 a record year for passenger miles
- Rail network now half its original size
- Punctuality best ever recorded
- UK has Europe's most modern train fleet
- 50% growth since 1990s & still going!
- Growth driven by economy & modal shift
- Biggest constraint now capacity
- How sustainable is our railway?

## What is Rail doing?

- Recycling waste
- Trying alternative fuels
- Looking at increased electrification
- Educating our staff e.g. drivers
- Beginning to shout about our green credentials
- Trying different technologies e.g. regenerative braking
- Becoming more efficient

## Public Transport – what's different?

- Economy buoyant over several years
- “Softer” drivers are becoming more significant
- Service standards improving
- Road congestion reaching “tip point”
- VFM perception of rail improving
- But .....
- Attitudes are changing too
- People & their expectations are changing

**So in April 2008 we asked 4,140 people in Cambridge and the South West Trains operating areas of the Company at random their views on public transport -**

## What our customers think & do

- **'The environment is a low priority for me'**
  - 64% disagree/strongly disagree
- **'The effects of climate change are too far into the future to worry about'**
  - 63% disagree/strongly disagree
- **'I use my car less'**
  - 47% agree/strongly agree
- **'I use buses more'**
  - 36% agree/strongly agree
- **'I use trains more'**
  - 19% agree/strongly agree

## Modal shift drivers - 1

- **'I would find it difficult to switch to public transport'**
  - 39% agree/strongly agree
- **'If buses were fuelled by biodiesel I would switch from the car'**
  - 8% agree/strongly agree
- **Has your mode of transport changed over the last 3 years?**
  - 10% yes

## Modal shift drivers - 2

- **Of those who had switched mode over the last 3 years:**
  - 36% who had used the car switched to the bus
  - 5% who had used the car switched to the train
  - 30% who had used the car now walked
- **Reasons cited for modal shift include:**
  - 20% health reasons
  - 12% environmental considerations
  - 10% availability of free bus pass

## Useful indicators

- **'I would be more likely to travel with a company whose ethics supported the environment'**
  - 62% agree/strongly agree
- **'I would be prepared to pay more for public transport which is environmentally friendly'**
  - 32% agree/strongly agree

## Who should we partner with?

In order of importance, how would you rate the following behaviours?

Recycling	92%	Very important
Wasting food less	90%	Very important
Reducing energy use at home	88%	Very important
Reducing water use	85%	Very important
Buying locally produced food	80%	Very important
Using a car less	61%	Very important
Flying less	55%	Very important

## What might this tell us?

- Need to urgently invest in capacity on rail rather than talk about it
- Need to invest in cleaner technology & operations
- Need to choose our partners carefully
- Modes of choice & behaviours are changing
- Need to adapt and plan for more growth