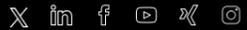


About Worldline

Worldline [Euronext: WLN] is a global leader in the payments industry and the technology partner of choice for merchants, banks and acquirers. Powered by c. 18,000 employees in more than 40 countries, Worldline provides its clients with sustainable, trusted and innovative solutions fostering their growth. Services offered by Worldline include in-store and online commercial acquiring, highly secure payment transaction processing and numerous digital services. In 2022 Worldline generated a revenue close to 4.4 billion euros.

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Corporate purpose

Worldline's corporate purpose ("raison d'être") is to design and operate leading digital payment and transactional solutions that enable sustainable economic growth and reinforce trust and security in our societies. Worldline makes them environmentally friendly, widely accessible, and supports social transformation.



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Where the journey begins

A plan to create a smart transport generation



Contents



04

Executive Summary

22

The Solution:
Smart Transport

08

Introduction

26

Invest In Transport,
Change Behaviours

10

The Current Situation

30

Why It's Needed Now

16

So Why Make It Work?

Executive Summary

Delivering a digital-first blanket concession for under-18s across rail, buses, trams and other forms of public transport.

Transport underpins our ability to connect with people, whether through work, socially or by accessing education. Despite being in the digital age and post-Covid, we still need to and aspire to move around.

With the need to reduce congestion on the roads and reduce our environmental impact, we are simply not making it accessible nor attractive for future generations to use public transport.

Many countries know that to get people using public transport, it starts by encouraging behaviours early in life. That means creating an easily accessible system that's not burdened with excessive costs. This can improve use of public transport, and reduce reliance on cars.

In the UK, there have been numerous regional and limited programmes to subsidise public transport for under 18s, based primarily on the fact that those people are the least able to afford it. Under 18s generally don't earn a substantial income and require transport to independently reach key services, particularly education. So why hasn't there been a joined up and coherent policy in England and Wales to provide young people with free travel?

Today, the UK's public transport system is increasingly expensive and complex, putting off generations of young people from using it. Inconsistencies in devolved powers, regional funding models and concessions mean there is an effective regional lottery in terms of the cost and ease of accessing public transport services¹.

In this paper, we propose a new systemic solution – a digital-first blanket concession for under-18s across rail, buses, trams and other forms of public transport.

Our assessment is that the annual fares basket loss of revenue for making rail, bus and tram fares free to all those under 18 years of age is

**£793m–
£986m**

per annum.

The opportunity is significant, with long-lasting, transformational benefits to society:

This proposal is affordable, and would importantly establish a 'Smart Transport Generation' that delivers long-term change in transport behaviours and bolsters the business case for transport infrastructure, while putting money back into the pocket of families.

01 Creating behavioural change

Improved confidence in public transport through the concession will result in long-term behavioural change. Simply delaying the age when someone chooses to begin driving, from 17 into their 20s, has been shown to result significantly different car usage patterns over a lifetime.

02 Saving families money

Lowering school transport costs for families, around £487 per child.

03 Improved well-being

Reducing loneliness and isolation in young people.

04 Access to opportunity

Improving access to the UK's £100bn sports, arts, music and culture sectors for young people.

Introduction

Good access to public transport plays a vital role in shaping our society.

Transport is around 14% of household expenditure.

Good access impacts and outcomes², availability of further and higher education³, and employment, playing a critical role in empowering young people and expanding the opportunities available to them⁴. It also influences our access to public services, like healthcare⁵, and our ability to engage in wider society, including important cultural opportunities that form the social fabric of the UK⁶. Improving access to public transport improves social mobility⁷.

While urban conurbations continue to increase in size and population, congestion and pollution are becoming an increasing challenge for Governments and local authorities. Encouraging more people to use more efficient, greener forms of public transport is also key to the Government's Net Zero obligation, with transport responsible for 24% of UK emissions⁸. Its Transport Decarbonisation Plan sets out the need to encourage people to travel differently, including increased public transport and ride-sharing, to reduce environmental impacts and improve the efficiency of our services.

While we know that improving access is key, car usage (cars per household)⁹ is higher than ever, while many groups – including young people, the mobility impaired, BME groups, the unemployed, and more – all experience serious disparities in access to good transport services¹⁰.

Furthermore, multiple modes of essential transport infrastructure – particularly rail and buses – have become deeply dependent on public subsidy post-Covid. Without meaningful reform, those subsidies risk being unsustainable in the long-term, and the risk is that transport inequalities worsen, rather than improve. The UK Government today is investing significant resources into improving transport, including public transport. However, the focus of investment is seemingly on large scale infrastructure projects, such as HS2, despite recent challenges in delivery, at the expense of community level improvements in urban and rural areas.

Worldline's focus goes beyond payments. As a business with a social purpose, we believe that there are ways to address these challenges that won't cost the Government a fortune, but instead will improve productivity, sustainable choices and well-being.

Our view is that we should look to extend free, concessionary travel by public transport to everyone in the UK under the age of 18 who are in full time education or training. We propose to do this through a modern, digital-first integrated system, crossing different modes of transport.

We make the case that this can be transformative in improving access to education, training and social opportunities, but also helping expand access without placing the burden on family incomes, particularly during times of unprecedented financial strain for UK families.

The Government and transport operators already subsidise many journeys for young people. While discount schemes differ by nation and region of the country, local authorities do not need to provide free transport as a blanket rule. There is however a minimum requirement to provide free travel to access education for young people living more than three miles away, and for those living with disability and/or Special Educational Needs (SEN) provision.

The cost of delivering this reform is relatively minimal, but the benefits will be far reaching.

This is a plan for a smarter, greener public transport generation.

The Current Situation

The Need: Across all forms of public transport, customer usage has yet to return to pre-Covid levels.

The level of customer demand has been 'spiky', unreliable, and generally now peaks at different points now peaks at different points in the working week and month, with differing situations across the country, and with frequent disruption due to the current industrial action.

While there is no official target for modal shift, the Government's Transport Decarbonisation Plan sets out the goal of encouraging greater use of active and sustainable transport, and the reduction of congestion on roads, to achieve a net zero transport system by 2050. Inconsistent public transport usage post-Covid has undermined the investment case for new infrastructure and has placed the achievement of environmental aims at risk¹¹.

The Barriers: Journeys made by young people across all modes have fallen in the past 30 years.

As we know, car usage and specifically the use of privately owned cars to complete journeys increases progressively into middle-age, while younger people are more reliant on public transport, and are more likely to be more receptive to using it in principle.

However, there are multiple and serious barriers that prevent young people from using public transport services more. An in-depth study by Transport Focus found that under-18s lacked confidence and experience using the rail network.. Dependence on parents to buy tickets and uncertainty on how to use and navigate fares and services is holding back real-world usage.

Price is also a significant barrier, as is the fundamental ability to access services, with poor integration of wider public transport leading to increasing reliance on parents to drive their children to the rail station¹². The impact is evident: journeys made by young people across all modes have fallen in the past 30 years¹³.

More broadly, independent studies that found that while 'nudging' users with behaviour changes can be helpful (e.g., actively promoting and praising public transport within a community), the most effective means is to provide clear economic incentives by reducing the cost of public transport use¹⁴.

The Role of Subsidies: we already subsidise many ‘Home-to- School’ journeys for young people to access educational services – the right to learn.

While schemes differ by nation and region of the country, there is a minimum requirement to provide free travel to access education for young people living more than three miles away, and for those living with disability and/or Special Educational Needs (SEN) provision¹⁵.

In London, bus and tram travel is free to all young people in full-time education under the age of 18, with discounted fares for the Underground and Overground. Attempts to end this scheme in 2020 through to 2022, as a condition of Transport for London’s financial rescue package, were ultimately unable to go ahead because of the cost and complexity that would be transferred to London’s local authorities to deliver the statutory concessionary travel arrangements.

In Wales, children under the age of 16 travel free with parents on off-peak rail and bus services, while in Scotland, all under-22s are entitled to free concessionary bus travel across the country.

An extensive study and consultation on extending concessions to young people found that this system would be deliverable, but its success and value for money would be dependent on better interactions with infrastructure planning, as well as wider public

programmes to support employment, health and well-being, where better transport access could be influential in shaping their uptake and outcomes¹⁶.

Including providing concessionary schemes at the devolved level, and in delivering subsidised services, the taxpayer is already providing significant funding to subsidise travel for young people. However, there is no certainty that this subsidy is being delivered effectively, or strategically.

Additionally, many transport operators already offer free fares for very young children under the age of around 5, although again, the implementation of this varies, for example as to whether they occupy a separate seat or not¹⁷.



Many transport operators already offer free fares for very young children

Global examples: Targeting better economic, environmental and social outcomes, other countries have developed targeted transport concession programmes.

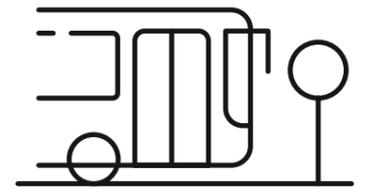
To target greater economic and societal outcomes, several other countries including New Zealand, parts of Italy, Estonia, and Luxembourg have developed, trialled and implemented targeted concessions for public transport as a means of encouraging better transport behaviours as their systems began to recover from Covid-19. This included a series of youth-targeted concessions and discounts in New Zealand, study-linked schemes in Italy, as well as blanket concessionary schemes in Luxembourg. In Scotland, the SNP and Green Party have investigated the potential to extend concessionary schemes to a greater proportion of young people through a blanket concession up to 25 years old.

A recent programme, delivered in New Zealand, demonstrates a potential route forward. It has taken a bold course of action to eliminate bus, train and ferry fares for all children under 13, while halving the costs of fares for people under 25. It projects a saving of \$30 NZD per average household as a result. Early indications have seen an improvement in public transport usage, and is showing signs of reducing congestion on the roads¹⁸.

In each case, the implementation of concessionary programmes has, unsurprisingly, changed usage behaviours. By eliminating the cost, more people have begun to use public transport to complete journeys. However, the experience of those programmes to date also suggests that achieving long-term transformation – economic benefit, the reduction of car ownership and usage, and better societal connectivity – is still reliant on investment in new public transport infrastructure. Put simply, a concessionary scheme may reduce the cost of mobility, but is hard to access if a bus doesn't arrive on time, get people to a convenient stop, or integrate well with train journeys.

Any intervention will need to make the long-term case for new investment in transport and build a more sustainable sector.

Barriers to access, such as living in a rural location where buses and trains simply don't go, still exist regardless of whether the journey is free or not. A lack of engagement with employment schemes (like workplace training, or work-and-study programmes) shapes those likely to consider using the service, and their motivation for doing so. There are bigger, wider systemic challenges to consider.



A recent programme, delivered in New Zealand, demonstrates a potential route forward. It has taken a bold course of action to eliminate bus, train and ferry fares for all children under 13, while halving the costs of fares for people under 25

So Why Make It Work?

Young people feel disengaged from the transport system, which can effect their life choices regarding educational benefits

Local authorities should improve access, enable families and young people to make active choices about their education provider, consider the distance from homes to their place of learning, and account for appropriate journey times, and costs of accessing transport¹⁹. Those factors play a role in educational outcomes²⁰.

However, crucially, young people are more likely to say that the existing transport system excludes them from life opportunities, like early career experience, social and cultural engagement, and different or better educational opportunities²¹. Young people feel disengaged from the transport system itself, with related impacts on their well-being, employability and societal participation. For younger people, car ownership is an attractive idea, but is increasingly expensive

amidst rising rates of insurance and vehicles, and concern about the environmental consequences²². As a result, young people rely on public transport, like rail, trams and buses, but the cost of transport impacts under-18s more significantly given their often-weakened spending power.

Tackling the impact on education, training and opportunity.

In recent polling focused on the Further Education (FE) sector, 72% of FE students who reported costs placing them in financial difficulties, 21% reported that transport was their main issue, narrowly trailing the cost of energy (23%). The Association of Colleges has reported that many young people who receive travel subsidies instead give them to their families, for food or energy costs²³.

Beyond statutory requirements, concessions for young people are discretionary, and in many cases, subsidies and schemes targeting young people have been cut by local authorities, leaving a patchwork of different concessions and discounts or incentives outside of London. The most recent DfT reporting found 17 out of 83 transport authorities offer some form of localised concessionary or incentive scheme to young people. But there is no sign that those schemes are understood at

a national level, nor integrated with other transport modes, like rail²⁴. Crucially, the Resolution Foundation notes that the disadvantages faced by young people in accessing transport services are also a barrier to levelling up. A young person in London can rely on concessionary, smart, integrated public transport to see their friends, participate in sporting and cultural opportunities, and access education and work, but their chances outside of London are a lottery.

The Resolution Foundation found that areas targeted by the levelling up agenda are generally those with greater public transport disparities, and where improvements to those services could significantly boost access to new employment, training and educational opportunities, as well as growing investment in cultural opportunities.

A 2019 study on transport inequality by the National Centre for Social Research, commissioned by the Department for Transport, found that²⁶:

01 Young ambition

Transport costs and inequalities were one of the key drivers for young people from deprived backgrounds failing to remain in education, employment or training post-Year 11.

02 Staying in education

'Transport poverty' relating to public transport meant that disadvantaged students, who may be dependent on weekend or evening work, when transport can be worse, often found it difficult to stay in education or training as a result.

03 Future hope

The impact of transport inequality had long-term consequences for incomes and opportunities.

04 Concessions

Concessionary transport schemes have strong, direct benefits in reducing costs, improving access, and improving the outcomes of other state services.

How a new system could help...

The current system may be subsidising significant number of journeys at a cost to the taxpayer to support access to education, but is failing to provide a joined up, effective subsidy achieving the intended outcomes.

For this reason, we are focused on improving the transport outcomes of young people, and designing a system that truly works to reshape how, why and what they achieve by travelling.

Crucially, public transport programmes specifically targeted at supporting and encouraging young people are more effective in building their confidence in using public transport to access new opportunities²⁷. Better access to transport programmes can change and shape the social patterns of young people, and better enable people to meet each other and build relationships. We also know that if possible, young people are eager to travel differently, and to reduce their reliance on cars to enable personal freedom and independence. Their appetite for better, smarter integrated transport is there²⁸.

In the long-term, the Government has already identified that reducing rates of car usage amongst younger people is 'sticky', establishing sustainable, durable sustainable transport behaviours²⁹. The current cohort of young people are the most likely group to use public transport – can we deliver policy to maintain this³⁰?

By delivering a concessionary transport offer that works, we can create a 'Smart Transport Generation' – in which young people have the confidence and access they need to use public transport as their first choice.



By delivering a concessionary transport offer that works, we can create a 'Smart Transport Generation.'

The Solution:

Smart Transport

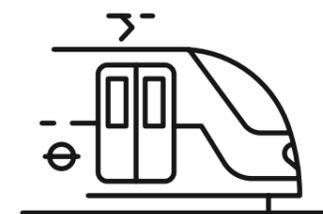
As we have set out, public transport faces a challenging recovery from the impacts of Covid, and a focus on radically improving the offer to young people can set the course for long-term improvement in its usage, finances and outcomes.

For example, rail is doing well in recovering its human and freight customers, lost during the pandemic. But that recovery is merely part of the future picture. To thrive, it must create a whole new generation for whom rail is their default choice – for economic and environmental reasons, but also because they love it, and because they benefit from it.

Our solution is simple, but far-reaching; Worldline believes that providing a national, integrated public transport concession at **“no cost” to young passengers under the age of 18** is an offer that can ultimately boost and continue to increase our overall GDP, by making access to education and future employment easy and cost effective as school leavers venture into adulthood.

In practice, this means the ability for young people to freely combine the different modes of transport they need to get to their destination. Intelligently combining rail and tram, for example, to get from Nottingham to Derby to take up an apprenticeship, or to apply for an Outstanding-rated sixth form college that would otherwise be inaccessible due to the cost of transport.

While transport poverty is a serious national issue that the DfT has identified as consequential for the life chances of disadvantaged young people, comparable studies of London’s concessionary system have found that it is effective at tackling transport poverty, shaping long-term sustainable choices and social and economic outcomes, and improving how young people choose to travel to connect with each other and experience their city³¹.



To thrive, [rail] must create a whole new generation for whom rail is their default choice – for economic and environmental reasons, but also because they love it, and because they benefit from it.

The Role of Digital Integration

By making public transport part of the solution, it will grow the economy. Today's under-18s can be the first generation to engage with on demand rail services and multi modal service compatibility to further encourage lifelong public transport usage. The free travel scheme would need to be carefully implemented to ensure that the inclusivity of the railways is not compromised or further complicated. It will need to be supported by the collection of real time movement data for young people to ensure capacity can meet demand and that the free system minimises any revenue fraud from misuse.

A concessionary programme will also produce a significant environmental benefit for the whole population, ease the stresses created by inner city congestion, and help to convince future generations of the benefits of travel by train and bus. Worldline believes we need to act now to re-engage young people on the benefits of rail and buses, which should and could be their first choice for any journey. Of course, it is critical that a concessionary transport scheme will need to be successfully implemented. For an age group that has near-total access to on-the-

go digital technologies, like smart phones, it would simply not be credible to deliver an old-fashioned paper or plastic card, nor would it deliver the value that the taxpayer needs³².

To ensure it created the intended outcomes, our proposal is to deliver a blanket concession via a smart, digital-first solution. Our recommendation is to deliver the scheme through a 'digital wallet' style digital service, enabling young people under 18 to simply tap, swipe, scan or otherwise authenticate themselves via their digital device to access the concession, across any mode of public transport.

Previous schemes, while well-intentioned, were not digital-first and could not guarantee a concessionary discount across multiple service operators, leaving young people with difficult, fragmented choices³³.

In addition to being more relevant to the target audience, this would crucially provide a series of important systems-integrated benefits for the taxpayer:

01 Solutions

As more and more regions begin to make use of new powers, like franchising changes, and devolved funding to take greater control of regional integrated transport, the concession can be readily integrated with new regional solutions for fares, journey planning, and access to wider services, like employment and training schemes.

02 Identify trends

A digital first concession, crucially, would enable providers of transport services to identify trends in usage as a result of better usage data collection. Even with full anonymity to reflect the sensitivity of the user group, and without collecting any personal sensitive information, the greater understanding of this programme would enable future transport services to be better planned. For example, it would enable transport service providers to identify the demand for new routes, or changes to schedules to make services more efficient.

03 Digital-first

A large, national cohort of users moving to a digital-first service would provide an immediate and large source of demand for better integrated digital transport services, providing an economic incentive for transport service providers to improve the integration of different modes of transport, and the ability to offer payment services for multi-modal transport once the concession ends.

04 Better measurement

The service and environmental benefits could be more readily understood, with greater access to user data enabling the Government to quantify the impact, and where necessary (for example, on low air quality days or during periods of peak congestion) either incentivise or deter behaviours.

This approach would deliver the easiest, most valuable concession possible.

The development of the solution itself and the integration of relevant smart

technologies across transport modes, a digital-first approach would reduce the long-term costs of operation, minimise fraud and inconsistency, and enable a programme of this scale to be easily rolled out.

Invest in Transport, Change Behaviours

A concession for young people under 18 will change long-term behaviour

Concessionary transport for under-18s can deliver long-standing societal, economic and environmental benefits.

Ultimately, our view is that a concession in young people under 18 will change long-term behaviour, and result in greater use and uptake of public transport services as they age, delivering last benefit to the overall financial sustainability of those services.

Based on Worldline's assessment, currently, the reduced rail travel for all under the age of 25 is around 10% of the £8.6bn of passenger fares revenue generated in the financial year 2022/23. Most of

these transactions are online and overall, the number of transactions is growing every year.

Currently the age group between 5 and 15 are classified for ticketing purposes as the 'child' group, and there are many discount schemes for accompanied children. This child category is around 17% of all young persons' travel (equating to £143m in fare revenues). Worldline believe the opportunity to offer all young people **under the age of 18 free travel** on our railways would be a significant and positive move by any Government.

Cost Breakdown

Our assessment is that the annual fares basket loss of revenue for making rail free to all under 18 years of age is estimated between:

£350m and £450m

In 2022, bus fare revenues were around:

£2.2bn

with under-18s, a group that generally takes more trips per person than the average for all age groups (around 30 per person for men, and 23 for women)

Around 17% of the population is aged between 5 and 18, and assuming a greater share of bus use – between 19 and 23% – would equate to between:

£418m and £506m



Tram and light rail passenger revenues, outside of London, are around £132m, equating to a share for 5 to 18s of between £25m and £30.6m. So, the operational cost of removing those fares across multiple modes could be expected to sit between around

£793m and £986m per annum.

By comparison, the **English National Travel Concession Scheme (ENTCS)** currently allows free off-peak bus travel only for all pensionable age and disabled people in England.

Outside of London, left out due to TfL's regional policy variation, as of the ENTCS's last evaluation, uptake was around:

75%, with cost of around **£855m,** mainly through reimbursements for fares³⁵.

Cost Benefits of Increased Usage

However, the advantage is easily offset by the positive impact upon our GDP, as concessionary rail and bus travel for young people helps to create tens of thousands of new employment opportunities, with improved productivity because of better access to education, training and employers.

A similar 75% uptake amongst the UK's 7.6m population of 10–18-year-olds

creates a cohort of around 5.7m people. The average UK GVA per head in 2019 sat at £32,904. Increasing GVA by just 1% for those 5.7m, £329 per head, would generate £1.87bn, before any indirect benefits are captured.

The wider benefits of the programme are also important, with quantifiable measures to track economic, environmental and societal improvement:

01 Solutions

Adding to the extent of the potential opportunity, the benefit to families, amidst a cost-of-living crisis, could be significant. A recent report by the Child Poverty Action Group found that the annual cost of sending a child to secondary school in the UK, inclusive of daily bus fares, is around £487 per child.

02 Identify trends

By providing greater access to public transport as a viable, affordable choice, we can change behaviours and achieve long-term modal shift toward sustainable choices. Those who learn to drive in their 20s drive around 30% fewer miles than those who learn in their teenage years, so we can expect to measure reduce car mileage over time³⁶ as well as increased vehicle occupancy, an aim set out in the Transport Decarbonisation Strategy.

03 Demand

By setting long-term behaviours, as this cohort ages, we can expect to also create improved demand for public transport, bolstering wider spending and investment into services that balances that cost of the scheme. The ENTCS evaluation found that the demand for new services to meet demand created by a concession also benefitted paying passengers, who had better access to their choice of services, and waited for less time. Simply removing the need to pay for a group of passengers speeds up services, which was also measured as a benefit valued in the millions for the ENTCS.

04 Affordability

By making public transport more affordable, we create the opportunity for improved access to arts, culture and sports, and associated careers and personal development. Those sectors account for nearly £100bn per annum in economic impact combined, meaning any widening of access could be significant.

05 Socialisation

Loneliness and its negative impacts costs around £9,900 per person, per year. Concessionary travel for young people in London is considered a critical tool for socialisation, so expanding it more broadly has the potential to reduce this³⁷.

According to the TUC, improving long-term investment in public transport can deliver a £50bn per annum improvement to the UK's economy³⁸; improving and changing generation perceptions and usage patterns to underpin this and begin shaping where services are needed is a logical first step.

Tackling this with a smart, integrated scheme would boost household disposable incomes at a crucial time, while improving the life chances of young people to continue in education and go on to access employment and education³⁹.

Why it's Needed Now

Transport policy is failing young people

Current public transport policy is failing young people, with significant regional disparities in access and affordability of transport, with those impacts affecting life chances, including access to education, employment and well-being.

Young people are the most important cohort through which we can influence long-term transport behaviours, toward better, more integrated and less car dependent travel, and where the costs of travel are damaging personal and family finances.

The UK would not be the first country to deliver a concessionary travel programme for young people but can learn from and realise the benefits of initial and smaller scale programmes delivered elsewhere. There is political interest, with political voices from Labour, the Liberal Democrats,

and recently the SNP and Scottish Greens, all having seriously investigated the expansion of concessions and targeted schemes for young people.

Crucially, delivered digital-first, a concession can develop and deliver the evidence necessary to plan better transport services, and understand and measure its success effectively. This can enable the service to overcome potential limitations, shaping long-term patterns of transport behaviour, bolstering and making smarter our ability to integrate and plan transport services, and deliver benefit for the taxpayer.

We can create a Smart Transport Generation – confident, capable and engaged with all forms of transport.

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