

INSIDE TRACK

The state of transport 2024



FOREWORD

The 'new normal'. It's a phrase that's been commonly used in the aftermath of the Covid-19 pandemic, which – in no exaggerated terms – obliterated transport trends in 2020 and 2021 beyond their familiar shape of the past decade.

Whether or not we have reached a 'new normal', or if such a phrase is ever appropriate to accompany our ever-changing transport landscape, now is the right time to revisit the trends and patterns, both of today and over the last 10 years, that illustrate how we move around our city regions.

This report aims to do as its title suggests: give readers the 'inside track' into those trends – to not only show what they are, but to also explain why they are happening and what they might mean for cities and transport within them.

Far from simply being a report about how many people take buses or ride bikes, *Inside Track* attempts to delve deeper to look at the social value of why people make trips – whether it's commuting to work or travelling to school. It also seeks to show how macro trends, from population and economy, to devolution, might impact upon transport, and how these are playing out across city regions and nationally.

Our intention is for this report to become a series, which is published on an annual basis, to provide a richer understanding of transport trends over the long term.

It will complement forthcoming policy work from the Urban Transport Group looking at how we sustainably fund transport (so it is affordable for both passengers and providers), how we create green and resilient transport networks, which are trusted and deliver social value.

I do hope it gives you the inside track into how transport is evolving and how we, as those working in the transport industry, can work collectively to improve public transport and active travel options across the UK.

Jason Prince, Director, Urban Transport Group



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About Urban Transport Group

The Urban Transport Group is the UK's network of transport authorities. Our vision is for cities, towns and their surrounding areas to be green, fair, healthy and prosperous places, supported by public transport and active travel options which provide access and opportunity for all.

urbantransportgroup.org

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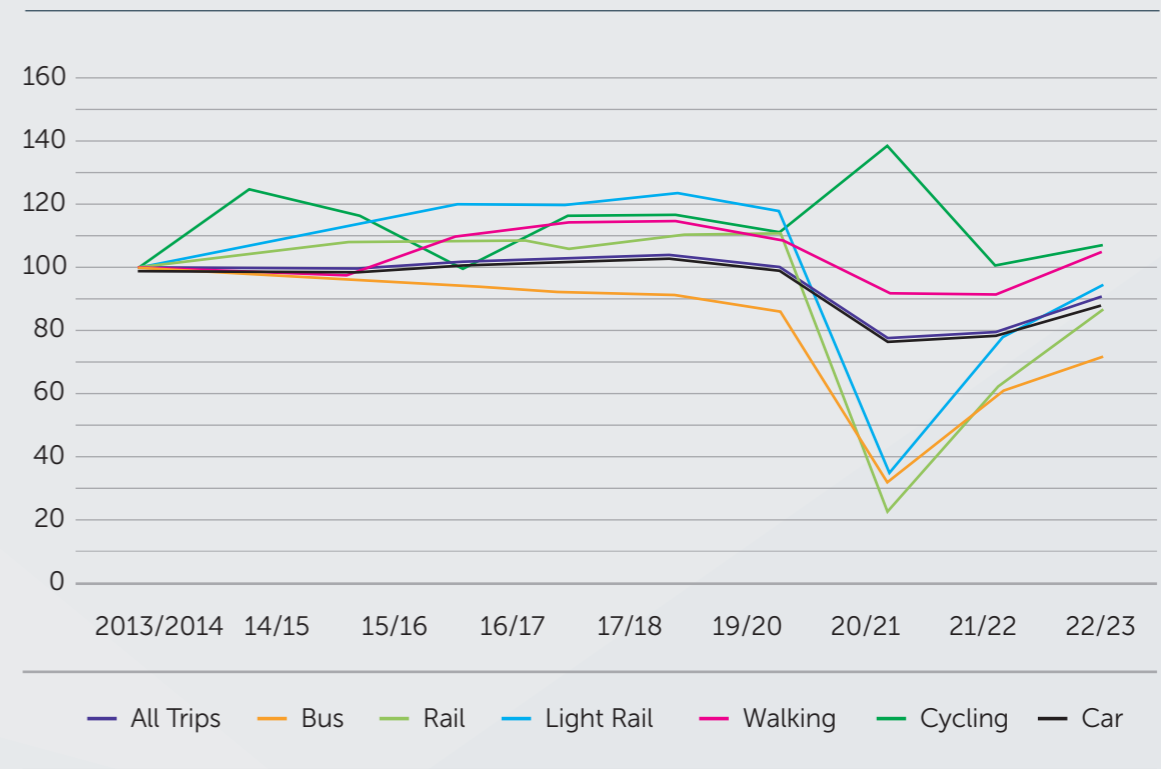
EIGHT KEY TRENDS & HOW WE SHOULD RESPOND

- 1 **Our city region populations are growing unevenly:** we need to unlock the full potential of all places.
- 2 **City region economies are growing, but falling short of the England average:** we cannot abandon levelling up.
- 3 **Devolution is accelerating at pace:** we need to maintain momentum on transport powers and funding.
- 4 **People are making fewer trips:** we need a clear integrated transport vision.
- 5 **Bus, the most used form of public transport, is stuck in a spiral of decline:** we must back the bus.
- 6 **Rail and light rail's pre-pandemic growth has stalled:** we need to get tram and train back on track.
- 7 **The pandemic cycling boom was short-lived, walking trips are recovering:** we need to champion all forms of active travel.
- 8 **The car is still king:** this needs to change.

Population and economic growth in the city regions over the last decade



Percentage change in trip numbers over the last decade



INTRODUCTION

Over the past 10 years we have lived through a rapidly changing political, economic and social environment. This is particularly true of the period from 2020 when Covid-19 emerged and became one of the most globally disruptive peacetime events in recent history. The pandemic and the current cost-of-living crisis have caused major shifts in how, why, and when people travel.

In the depths of the first Covid-19 lockdown, public transport patronage fell as low as 10% of its normal levels. Government stepped in with emergency funding and prevented the decimation of networks, but with patronage yet to fully recover and the cost of providing services continuing to rise, public transport still faces difficult times.

There have been a number of permanent changes to the way we travel and when we travel. Trends such as working from home and online shopping have accelerated, whilst remote working is now available to far more of the workforce than it was in 2019. Meanwhile, the cost-of-living crisis has reduced disposable income levels, further contributing to lower levels of mobility and a reduced need to travel.

Although patronage has returned well since the low of 2020, it is important to remember that public transport networks were already in decline. This report will focus on population, economic and travel trends over the previous decade and how these have played out in the city regions.

Although the Urban Transport Group has associate members in the devolved nations of Scotland, Wales and Northern Ireland, as well as other smaller urban areas in England, this report focuses on transport trends in the largest English city regions (our full members) given their economic and population status, the ability to compare data across areas, and the availability (or unavailability) of data for smaller urban areas.

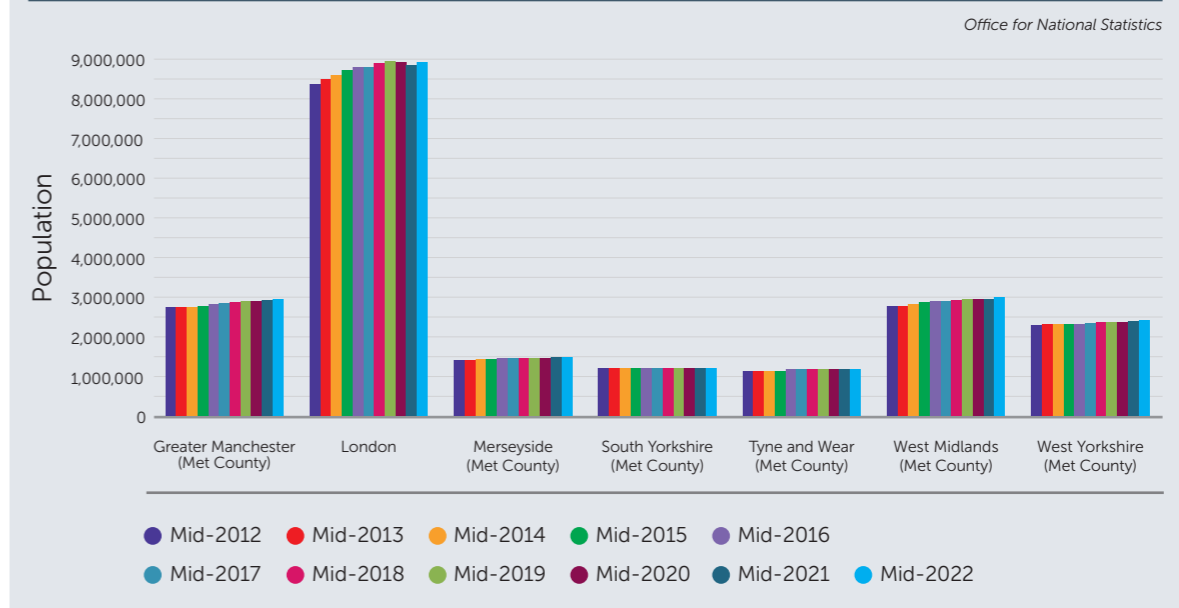
POPULATION, ECONOMY AND DEVOLUTION

Public transport is not primarily a trip generator in itself, rather people travel when they have somewhere that they need to be, be that work, leisure, shopping, education or healthcare. Therefore transport is a driver of the population and economic profiles of our city regions.

Population

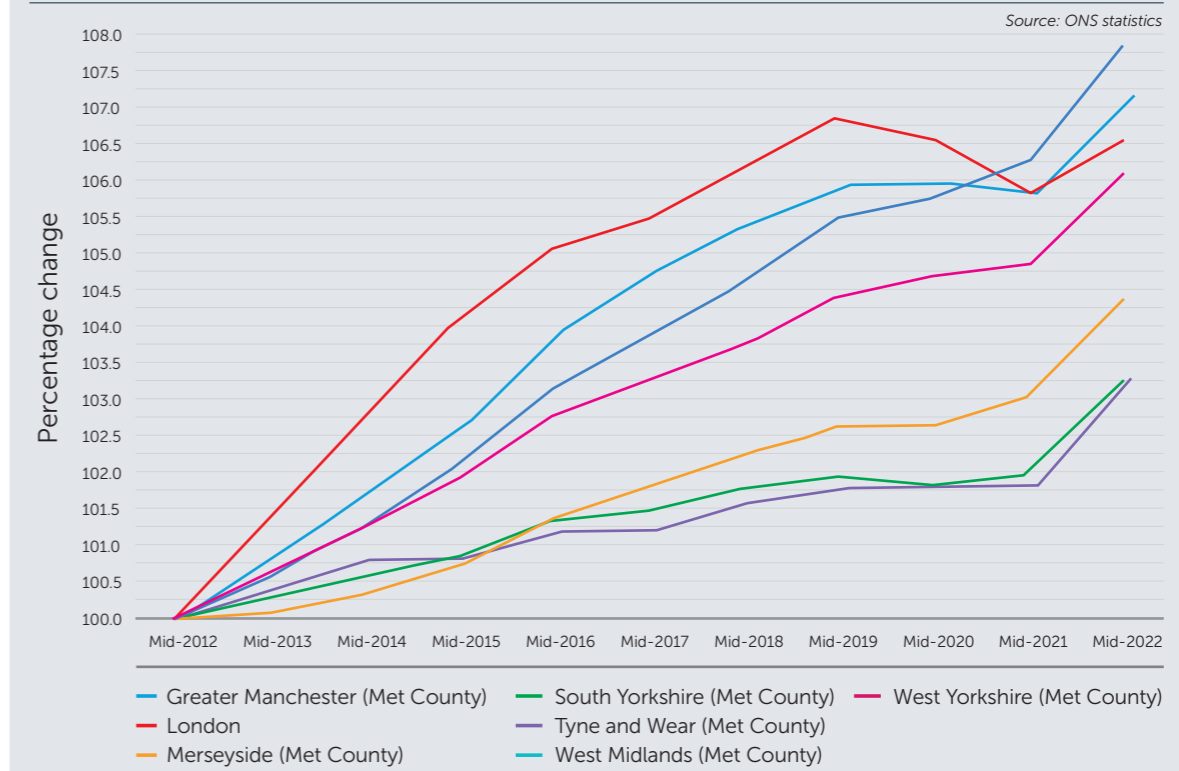
The city regions have a combined population of 21 million people and have grown over the past 10 years. Covid-19 briefly changed this trend, with people looking to move out of cities during periods of social restrictions, but the most recent year has seen populations begin to rise again.

Population by area



The rate of population growth is not distributed evenly across the city regions. Greater Manchester now has the highest 10-year growth rate, with West Midlands, London, and West Yorkshire experiencing a similar trajectory. An apparent split in the city regions population growth has emerged, with Merseyside, Tyne and Wear, and South Yorkshire experiencing significantly lower levels of population growth compared to the others.

Percentage change in population by area

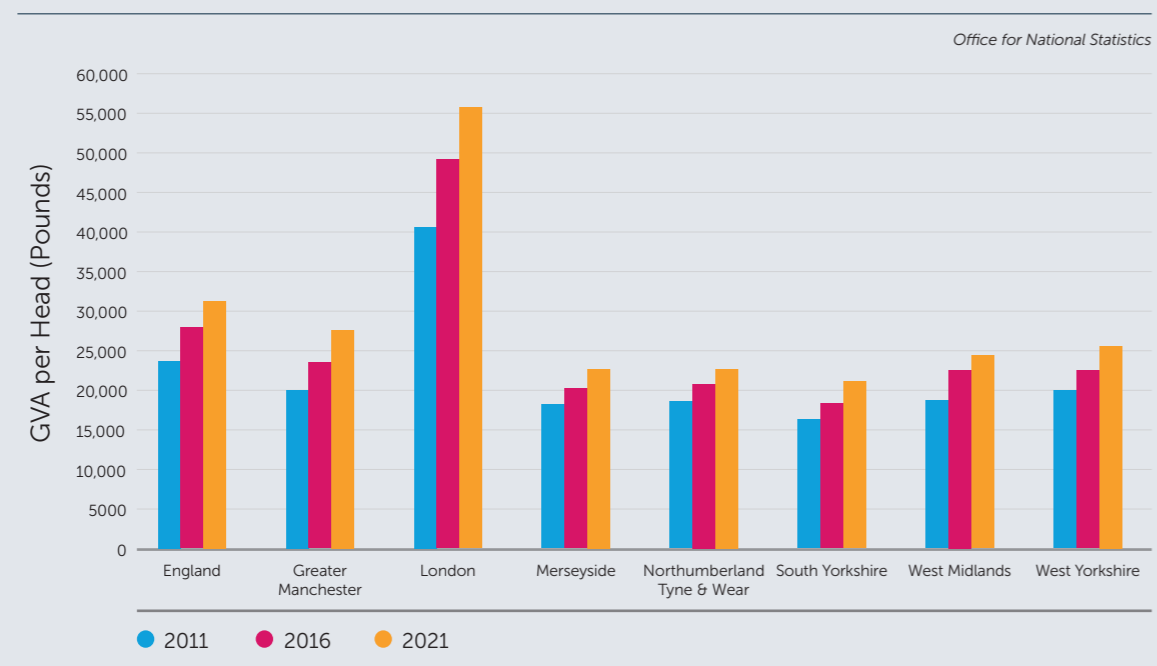


Economy

City region economies are growing, however, the Gross Value Added (GVA) per head of population (a key measure of economic performance) remains below the national average in all cases, other than in London. City regions are complex economic areas, containing thriving central business districts and manufacturing centres, but also pockets of severe deprivation, as well as rural hinterlands.

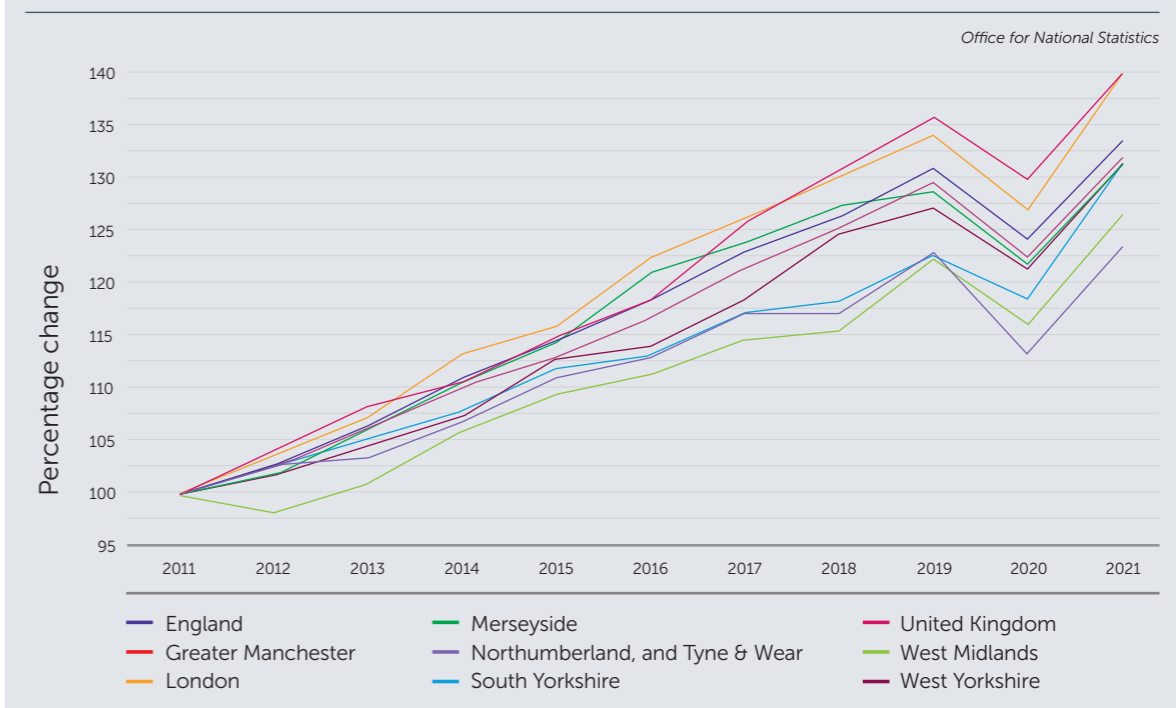
London has by far the strongest economy, with a GVA per head of population of £55,400. This is significantly above the England average of £31,000, and the best performing city region, Greater Manchester, which is at £27,450.

GVA per head of population by area



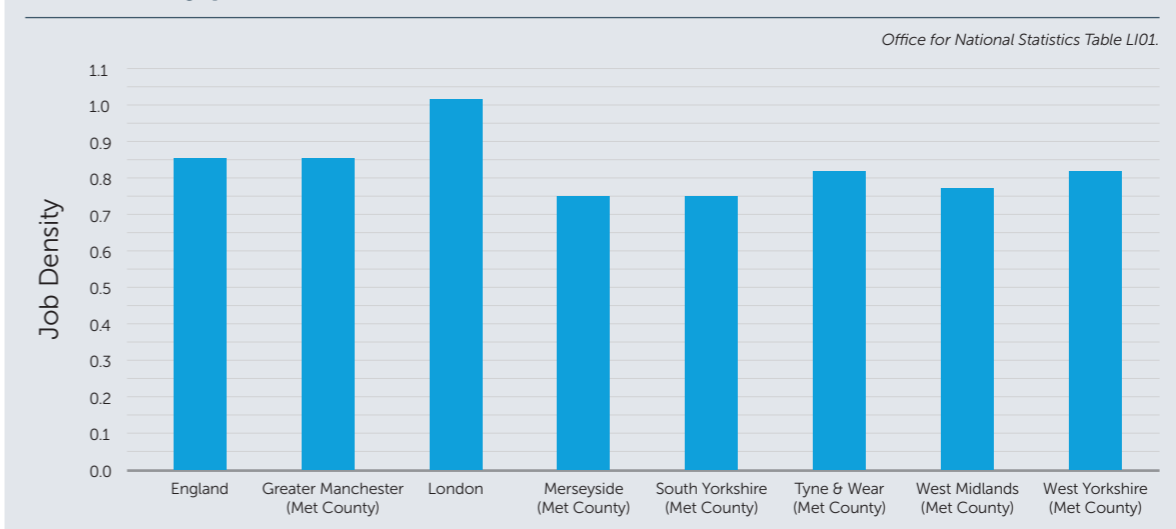
Whilst the GVA of our city regions is growing, over the past 10 years, only Greater Manchester and London have grown faster than the national average. If this trend continues, the gap between the national average and other city regions will increase.

Percentage change of GVA per head by area



Despite the dense economic centres of the core cities, the city regions largely have a lower number of jobs per person than the national average. This in part reflects their complex geographies as mixtures of urban centres and rural hinterlands. Again, London is the only city region to outperform the England average, with Greater Manchester the only other city region not falling below the national average.

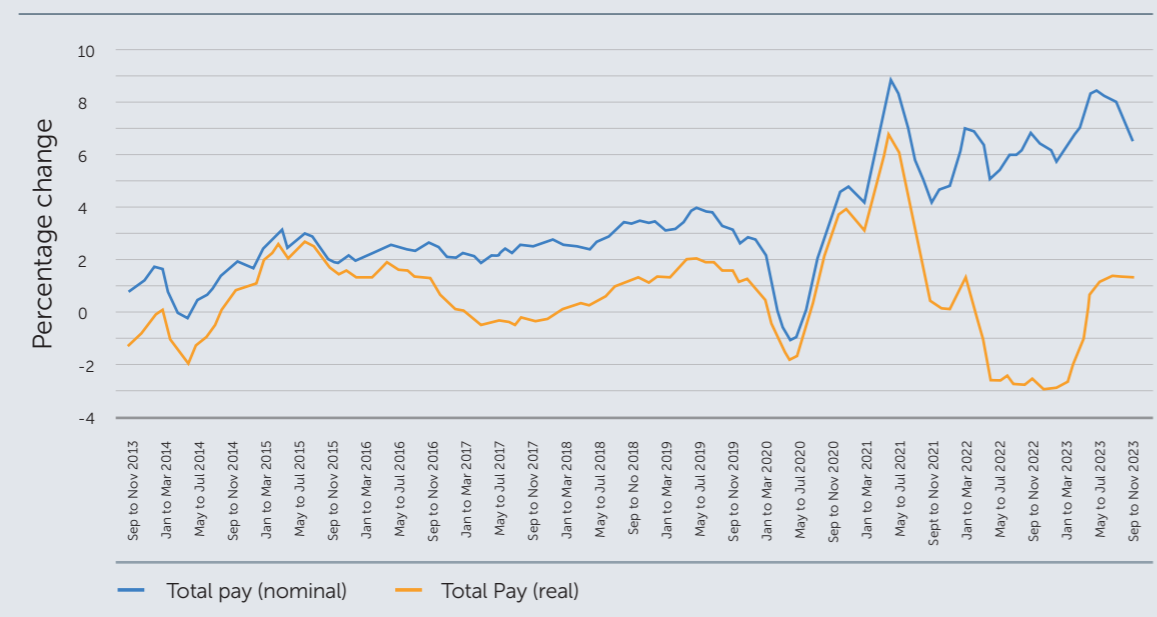
Job Density per Area, 2021



Agglomeration effects mean that, in theory, the larger the city, the more productive it becomes. However, research by the Open Data Institute Leeds¹ finds that, almost uniquely among large, developed countries, the UK's large cities (excluding London) see no significant benefit to productivity from their size – meaning agglomeration effects do not seem to hold true for them. The researchers attribute this to poor public transport connectivity compared to European comparator cities, with congestion placing a brake on productivity.

The cost-of-living crisis has placed an additional strain on our economy. Although wage levels have continued to rise, they have fallen below inflation since 2022. This has caused a real terms pay cut for many people, reducing their disposable income and increasing hardship across sections of society. Although real pay started to increase again at the end of 2023, there will be a lag as people's finances catch up with the impact of inflation. With travel being a means to an end, this may impact on the number of trips people make – with shopping footfall suggesting that people started to rein in leisure trips through 2023².

Total pay levels and real pay levels after inflation



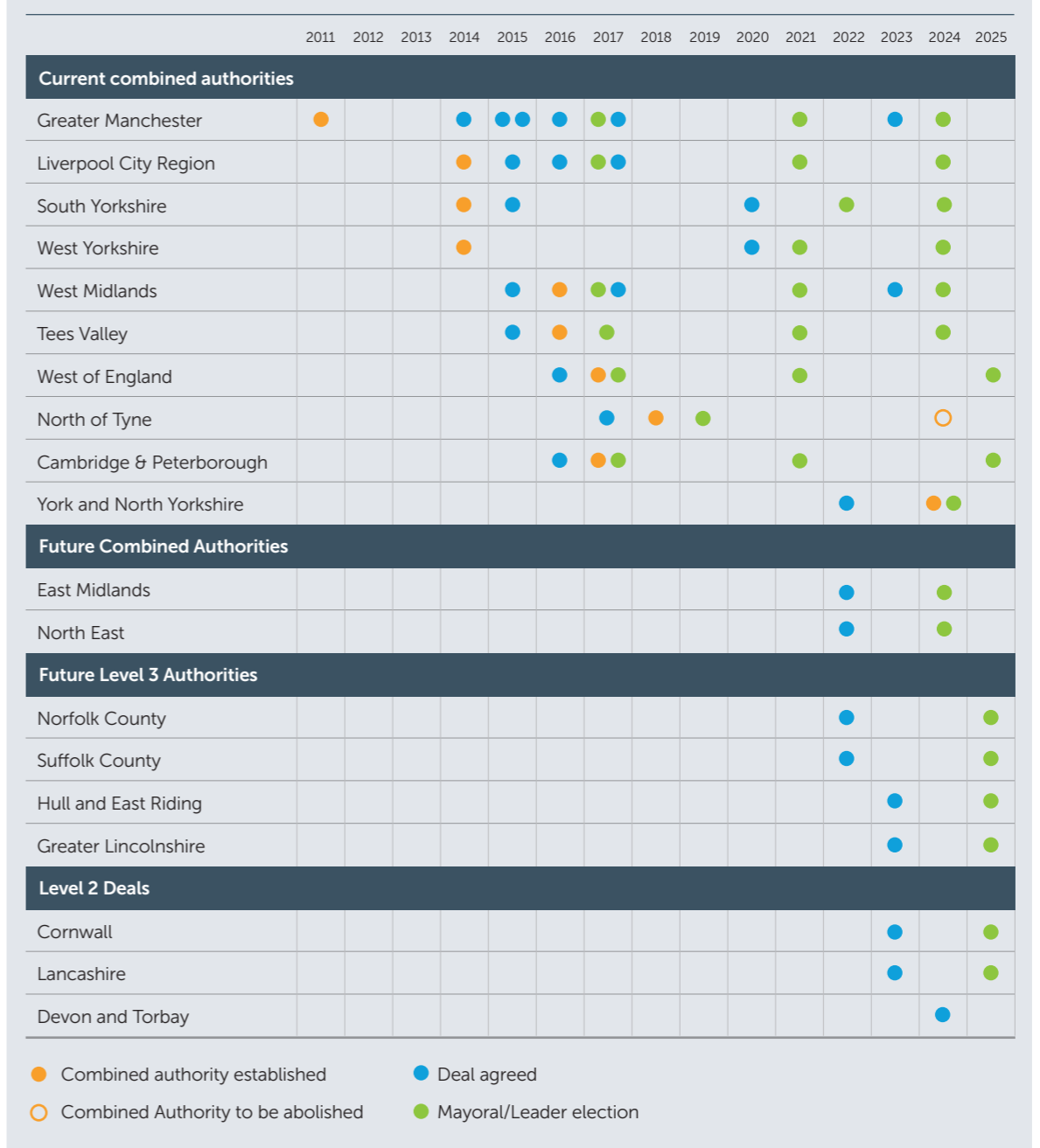
Given their size and population, our city regions are the economic powerhouse of the country. However, they are clearly being held back, with a significant economic prize on offer if we can level up their economies and unlock their potential. Transport must play its role in connecting people to opportunities and enabling the agglomeration effects that ensure the dense centres of high value employment deliver on their potential.

Devolution

Devolution is an important factor in the acceleration of growth and the creation of integrated networks, a process that has accelerated since 2012.

Devolution deals currently cover 41% of England's population, 49% of its economic output, and 14% of the land area. Once the deals introduced in 2022, 2023 and 2024 are implemented, devolution will cover 60 percent of the English population³.

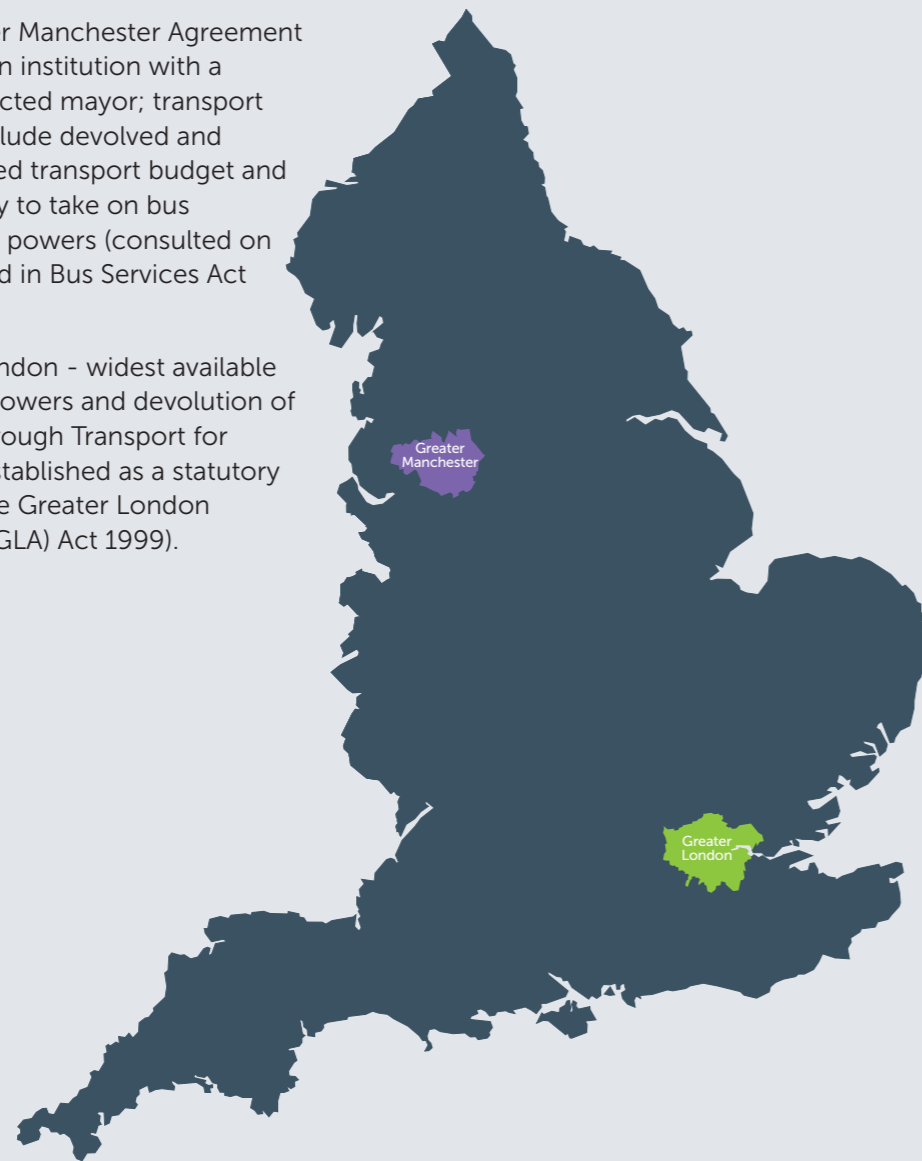
Timeline of English devolution deals



As of February 2024, devolution deals containing some level of transport powers have been agreed with nineteen areas, although seven of these still require local and parliamentary ratification. The most significant developments in the devolution of transport functions and funds (beyond Greater London - which is now the only major city region without a long-term funding deal) have taken place in Greater Manchester and West Midlands through Trailblazer deals. These deals agreed in 2023 have focused on simplifying funding arrangements, providing more flexibility, and granting powers that would support the creation of integrated cross-modal transport networks. From the next Spending Review period these areas will receive a longer-term, streamlined, department-style funding settlement, providing greater certainty and flexibility. Most recently, the next level of devolution – Level 4 – was introduced in the devolution framework, offering access to further levers on local transport as well as the promise of a single pot transport settlement to eligible areas.

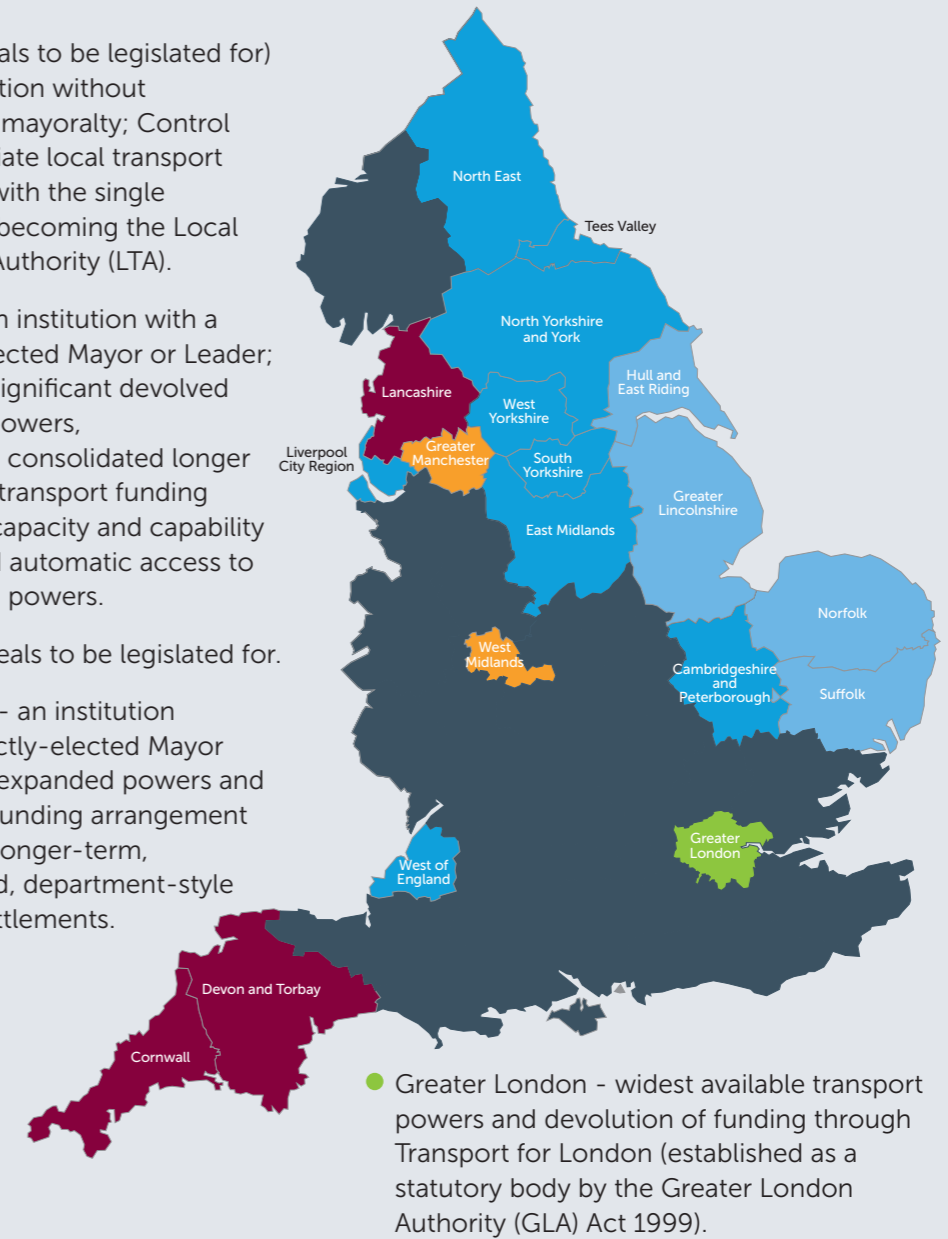
State of devolution in 2014

- The Greater Manchester Agreement (Deal 1) - an institution with a directly elected mayor; transport powers include devolved and consolidated transport budget and opportunity to take on bus franchising powers (consulted on and granted in Bus Services Act 2017).
- Greater London - widest available transport powers and devolution of funding through Transport for London (established as a statutory body by the Greater London Authority (GLA) Act 1999).



State of devolution in 2024

- Level 2 (deals to be legislated for) - an institution without an elected mayoralty; Control of appropriate local transport functions with the single institution becoming the Local Transport Authority (LTA).
- Level 3 - an institution with a directly-elected Mayor or Leader; access to significant devolved transport powers, including a consolidated longer term local transport funding (CRSTS – capacity and capability tested) and automatic access to franchising powers.
- Level 3 - deals to be legislated for.
- Trailblazer - an institution with a directly-elected Mayor with most expanded powers and simplified funding arrangement through a longer-term, streamlined, department-style funding settlements.



Summary

The city regions are the population and economic powerhouse of the country, home to one in three people and a significant proportion of the national economy. However, they are experiencing below average growth in GVA per person. If current trends are to continue, the majority of the city regions will fall further behind the national GVA average, with only Greater Manchester and London matching or surpassing the national performance.

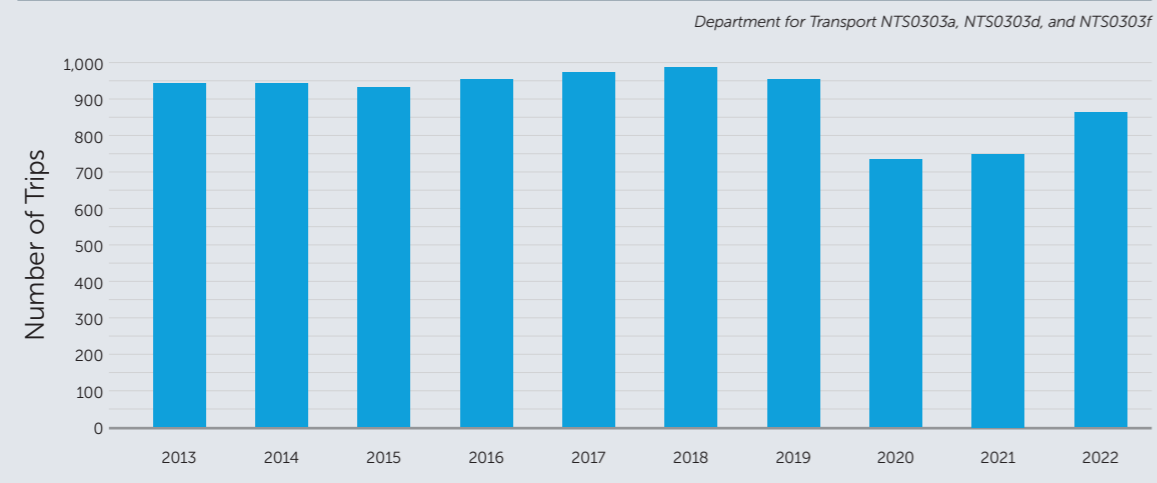
Public transport, walking and cycling play a key role in connecting people with opportunities, enabling economic growth without the associated congestion. Our city regions have poor connectivity when compared to cities of similar sizes across Europe and this has been shown to negatively impact and hamper their productivity. Investment in connectivity is one part of the puzzle that we must solve if we are to level up our city regions and unlock their full potential.

CHANGING TRAVEL PATTERNS IN A POST-PANDEMIC WORLD

Overall travel trends have been stable for much of the last 10 years – by 2019 the average person was making just 10 more trips per year than they were in 2013. However, Covid-19 upended this stability, significantly speeding up some of the changes in lifestyles and behaviours that were gradually emerging under the surface.

The low point of 2020 saw each person make just 728 trips, a fall of over 200 trips per person on the previous year, as people were told to stay at home if they could to prevent the spread of the virus. Although trip numbers are recovering, the 2022 figure of 862 trips per person is still 10% below the 2013 figure. This reduction in trips has been driven by a number of health, social and economic changes, brought about by Covid-19.

The total number of trips made per person (all modes)



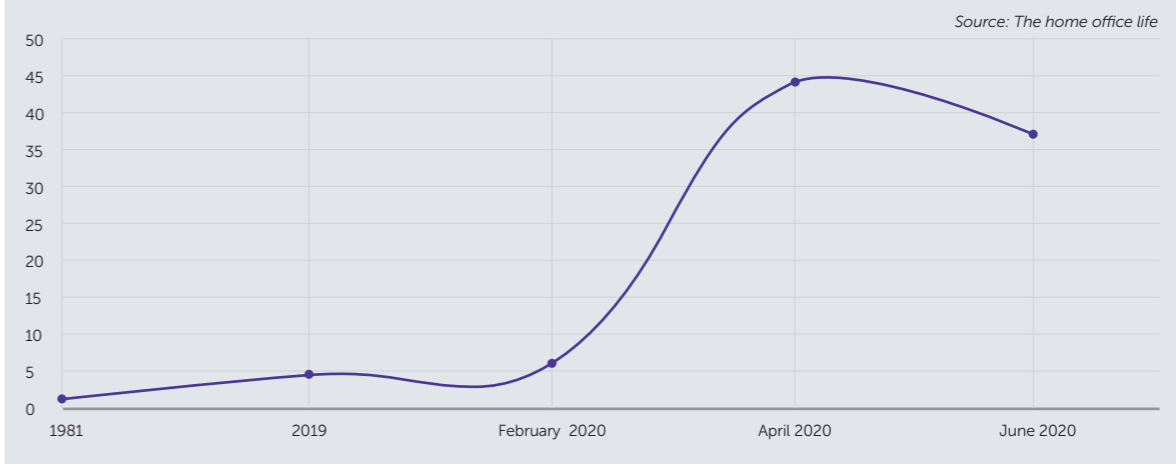
Trends have also been compounded by the cost-of-living crisis, which has hit disposable income and further limited some people’s ability and need to travel.

Throughout this section, we will explore how travel trends have changed around three of the key public transport trip generators – commuting, shopping and leisure trips, and education.

Commuting trips

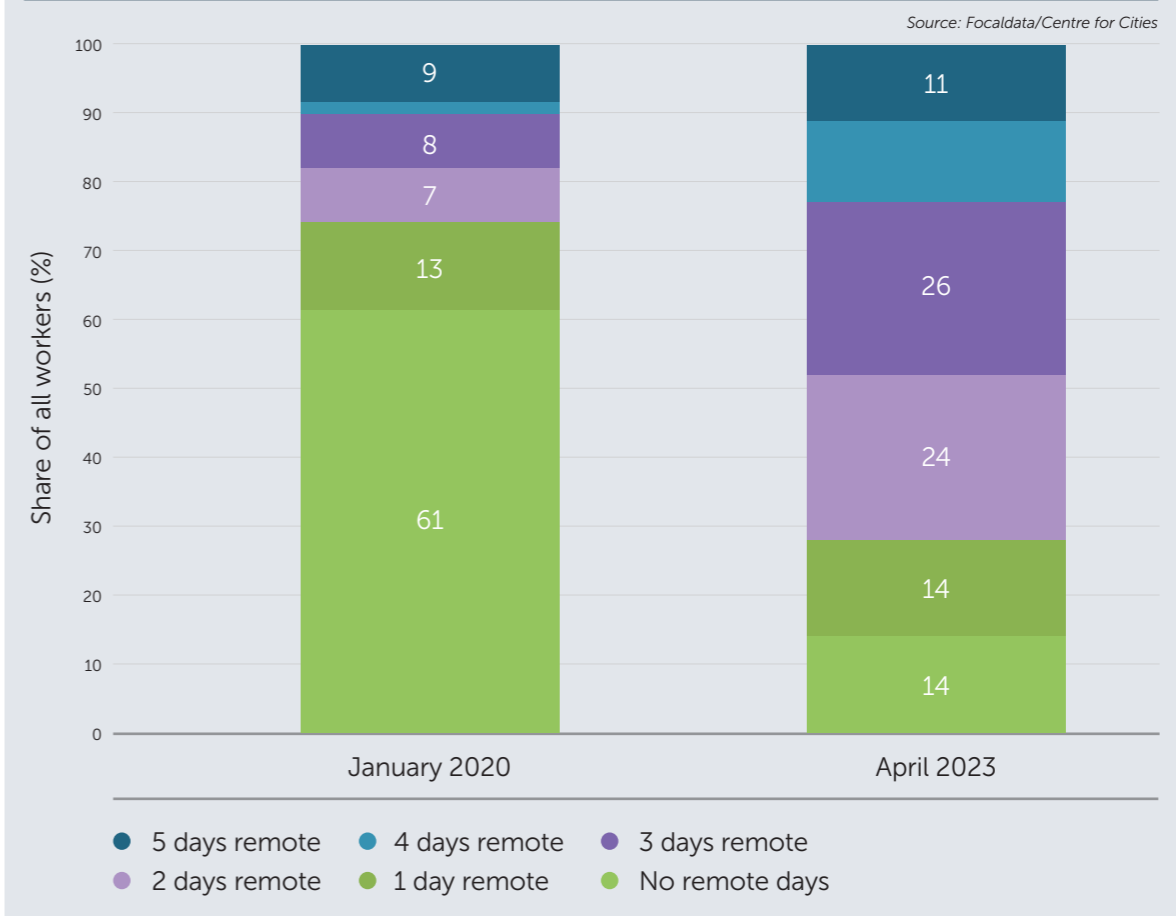
One of the main changes in travel patterns has been to our commuting habits, a staple of public transport patronage. Although some work will always remain place-based, Covid-19 lockdowns accelerated the possibility of working from home, with many offices fully closed for a period of time. Around 40% of workers now have the option to work from home⁴. The graph below shows how working from home rapidly accelerated from a very low base of around 5% of people in early 2020⁵.

The percentage of people working from home



In 2019, people went into offices an average of 3.8 days a week⁶. By 2023, two days in the office was the most popular working pattern⁷. This trend appears here to stay, with surveys showing that the uptick in office occupancy from 2022 stalled in 2023⁸.

The number of days office workers spend in the office



The Department for Transport's National Travel Survey found that the average number of commuting trips was down to 230 trips per person per year in 2022, falling from 302 in 2012⁹. Whilst the commute will have remained the same for many people who have to work at a specific location, it is likely that the fall in commuting trips is more drastic for those who can work from home. The reduction in commuting trips has had a knock-on impact on the tickets that people are purchasing and has driven a movement away from season tickets.

Rail ticketing data shows that the number of journeys made on a season ticket is down from 620 million in 2018/19 to 204 million in 2022/23, a reduction of 66%¹⁰. During this time, all other major ticket types have recovered to their pre-pandemic usage. The movement away from season tickets could have a wider knock-on impact on how we make journeys. Without a season ticket people are not locked into a mode. Instead, they must pay for each trip, meaning that they can make decisions on how is best to travel rather than having a "free" mode to use.

The reduction in commuting has not been even across the week, with patronage significantly down on a Monday and Friday. Research in 2022 found that as few as 13% of office workers were going to the office on a Friday¹¹. This pattern of travel presents additional challenges for providers of public transport, who still need to provide a high level of peak capacity, but have fewer days of the week where patronage, and crucially revenue, match this level of demand.

A trend is also emerging where people from the suburbs and from outside of cities travel in to work on fewer days a week than those who live in the city. Research looking at London suggests that those in the city now travel to their place of work 2.4 days each week compared to 2 days for those travelling from outside of the city¹².

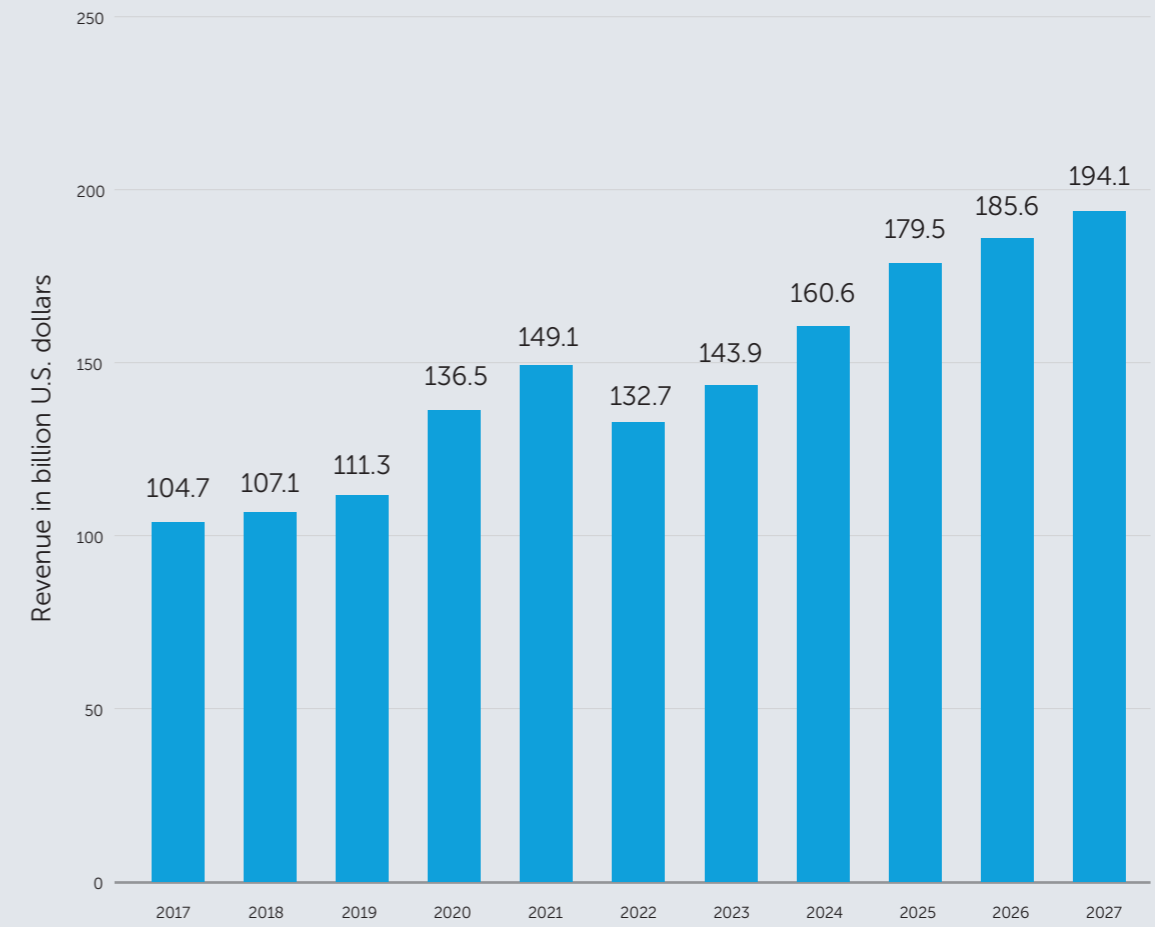
Shopping and leisure trips

Trips to leisure and shopping activities are another core for public transport, with the average person making almost 250 trips each year for these purposes. Looking at retail, the Covid-19 pandemic has accelerated a clear and likely permanent shift towards more online shopping.

E-commerce revenue increased by over 20% year-on-year in 2020, with a further 10% increase in 2021¹³. Whilst levels fell back in 2022, they remained significantly above pre-Covid levels and the level that would have been expected had the pandemic not happened.

UK retail e-commerce revenue over time

Source: Statista 2024



Footfall at key retail destinations has recovered from the lows of 2020, but has remained suppressed. Footfall rose by 0.2% year on year across UK retail destinations in 2023, including a 1.2% increase for high streets. However, retail footfall is still 14.9% down on pre-pandemic levels¹⁴.

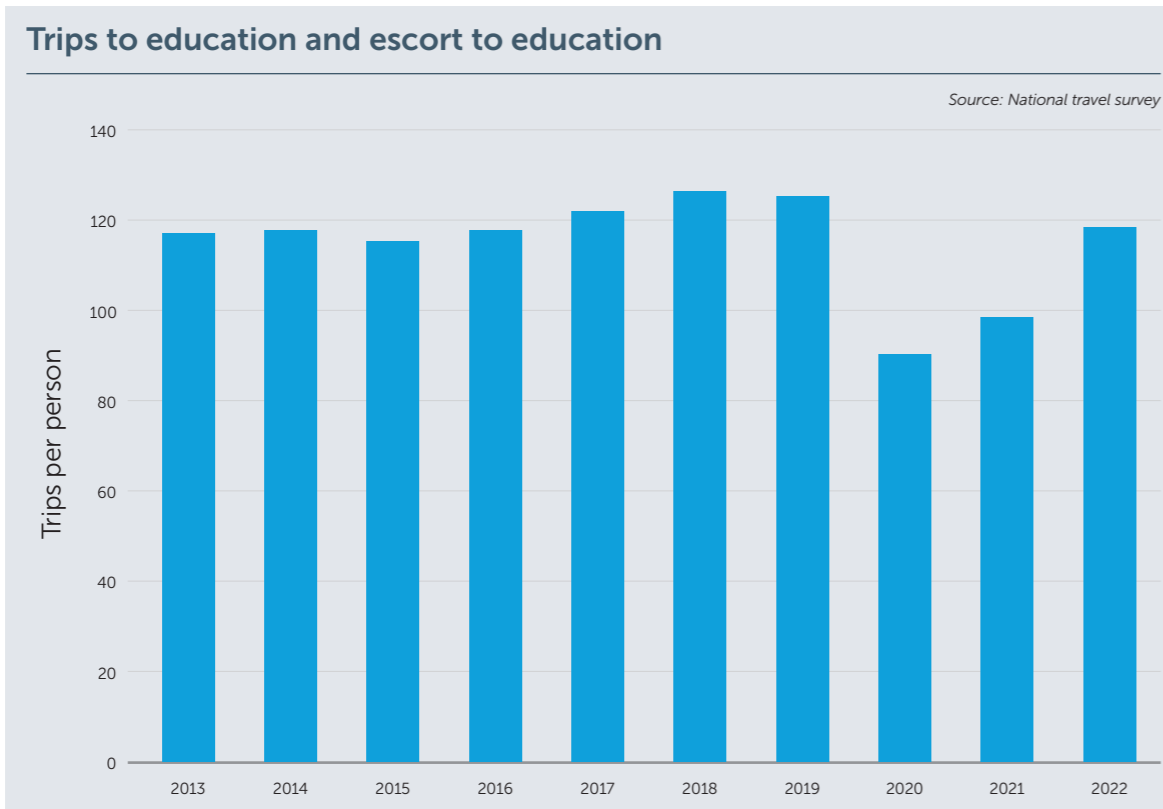
The impact of this is that the average person has gone from making 184 trips to shopping destinations in 2013 down to 151 in 2022, a reduction of almost 20%¹⁵. The bus has been hit particularly hard by this trend. In 2013, the average person made 11 shopping trips by bus each year, but this has fallen to just five in 2022.

Leisure travel has bucked the trend in some places, with examples emerging of pre-pandemic trips levels returning. LNER has reported that their busiest days is now Friday and Sunday as they continue to see strong demand for leisure travel¹⁶. TfL are reporting a similar trend, with leisure travel back to 2019 levels whilst commuting trips remain suppressed¹⁷. In part, this trend is driven by work from home, with people either planning their office days around leisure events or having to make additional weekend trips to city centres.

Overall, hospitality and leisure spending grew by 9.5% in 2023¹⁸. However, restaurant trade suffered, seeing a decline of almost 7% as people cut back on eating out. With inflation starting to fall, it is expected that the sector will see further growth in 2024.

Education trips

Education is a major generator of trips, with the average person undertaking 62 trips to education and 56 trips escorting someone to education each year¹⁹. Trips to education fell slightly through the pandemic as schools and universities closed, but have rebounded to almost the pre-pandemic level.



Walking was the dominant mode used for trips to education or escort to education (51 trips per person) with trips as a car or van driver or passenger the second most common (50 trips per person).

Summary

Travel trends have been relatively stable for much of the last 10 years, with a gradual increase in trips before the Covid-19 pandemic. Travel was slowly changing, as trends such as working from home and online shopping changed our reasons and frequency of travel. However, the disruption of Covid-19 and the restrictions on social mobility appear to have fast tracked these trends, contributing towards a significant decline in trip numbers.

Although it is likely that the recovery from Covid-19 is still on-going, although at a much slower rate than in the initial years, these trends will make it difficult for public transport to reach its pre-pandemic trip numbers.

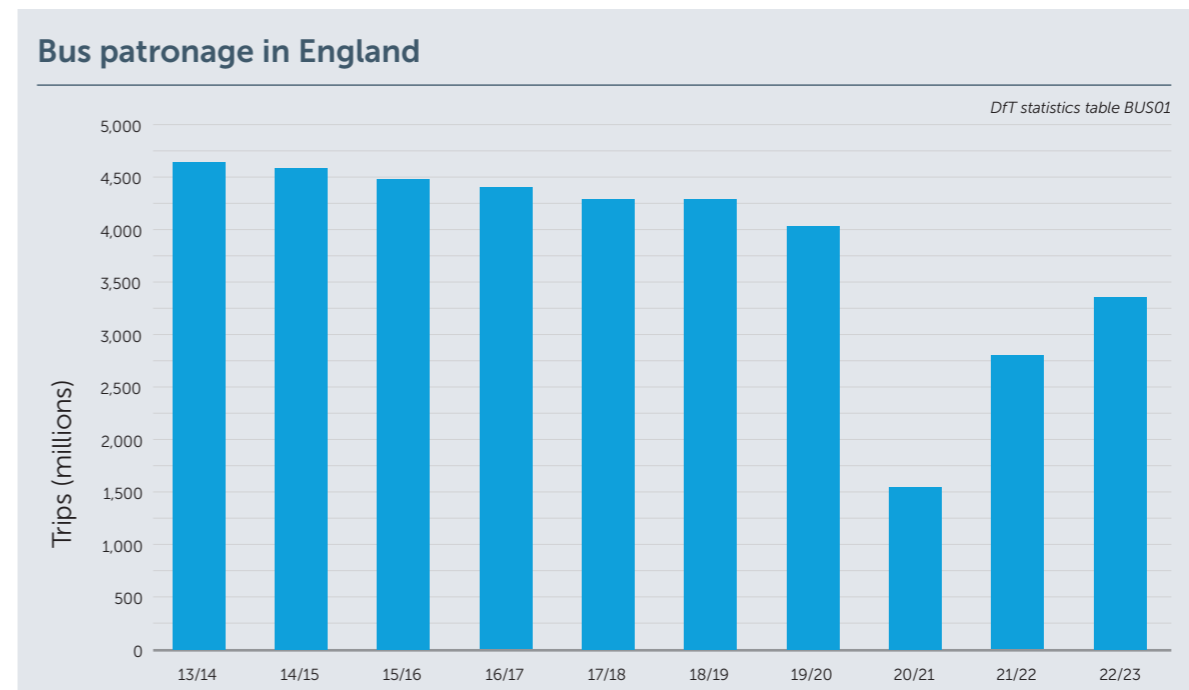
The impact of these social and economic shifts has not been felt evenly across all transport modes. The following sections explore the impact of these changes by mode. Given that each mode plays a different role in local transport networks, it is likely that the changes in our travel habits will play out differently.

TRENDS BY MODE

Bus

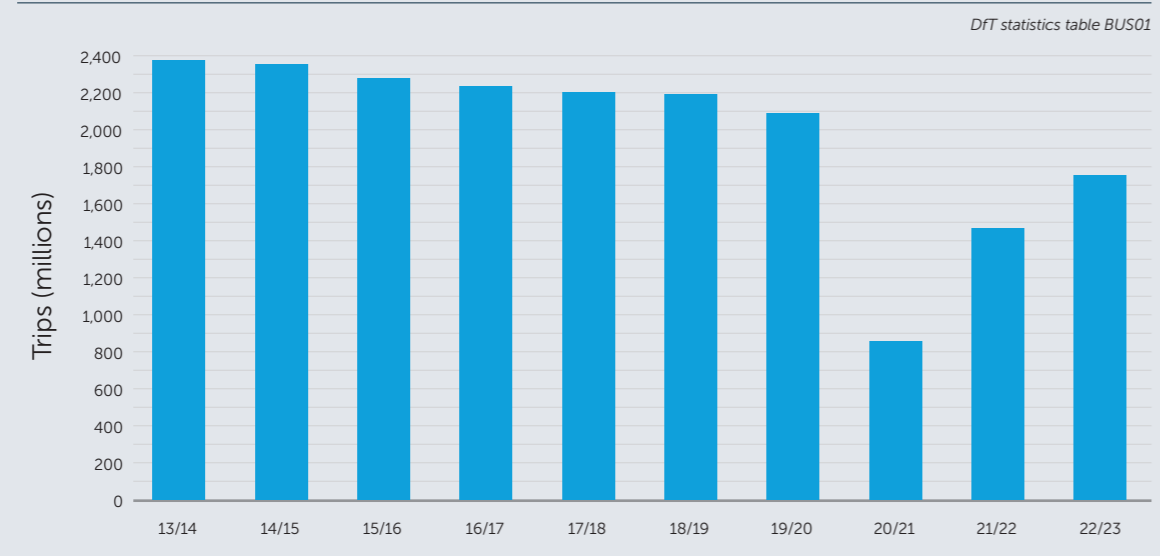
The bus remains the most used form of public transport, accounting for around 60% of all public transport trips in England, yet it continues to face year-on-year cuts to service levels. Covid-19 and the subsequent cost-of-living crisis have reduced patronage demand, which has in turn seen commercial bus operators focus on their most profitable routes, placing greater pressure on limited central and local government funding to fill the gaps.

Bus patronage has been in long term decline, with patronage in England falling from 4.6 billion in 2014 to just over 4 billion trips a year in 2020. The pandemic has accelerated this decline, with patronage reaching just 3.4 billion in 2023, around 85% of the pre-pandemic level and 72% of the 2014 level.



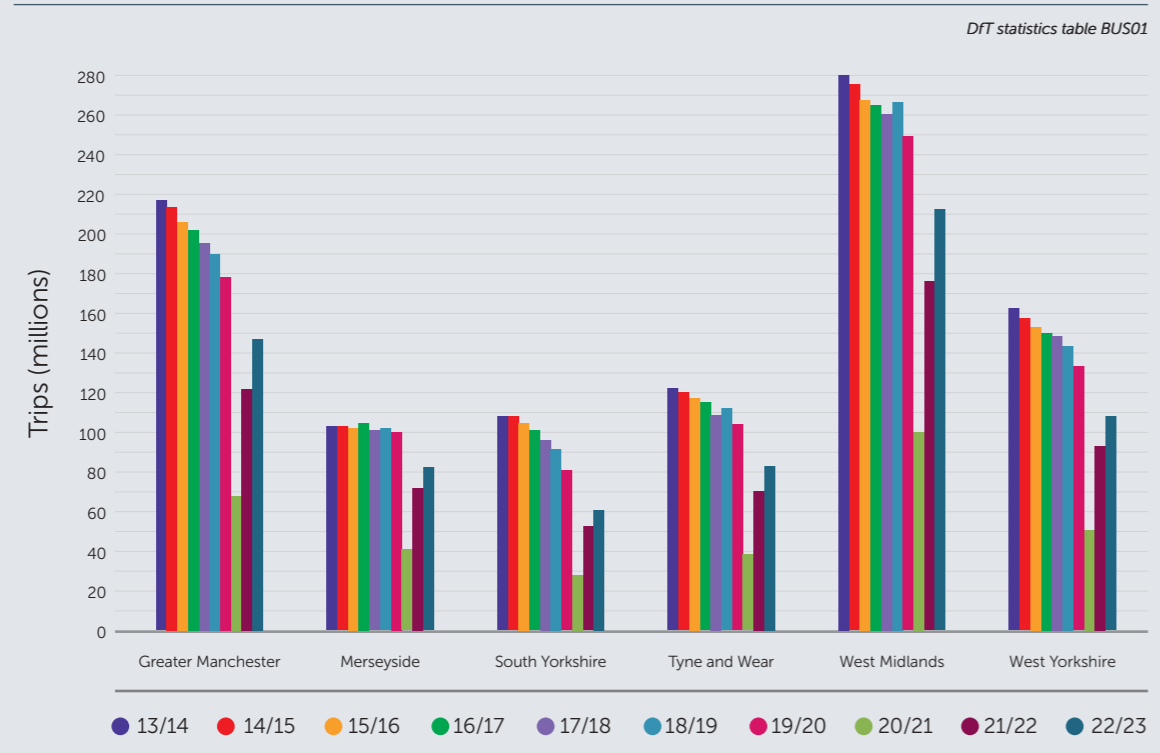
London has seen a gradual decline in bus patronage over the last decade after a long period of growth, and, in line with the England average, has reached around 85% of pre-Covid patronage levels.

Bus patronage in London



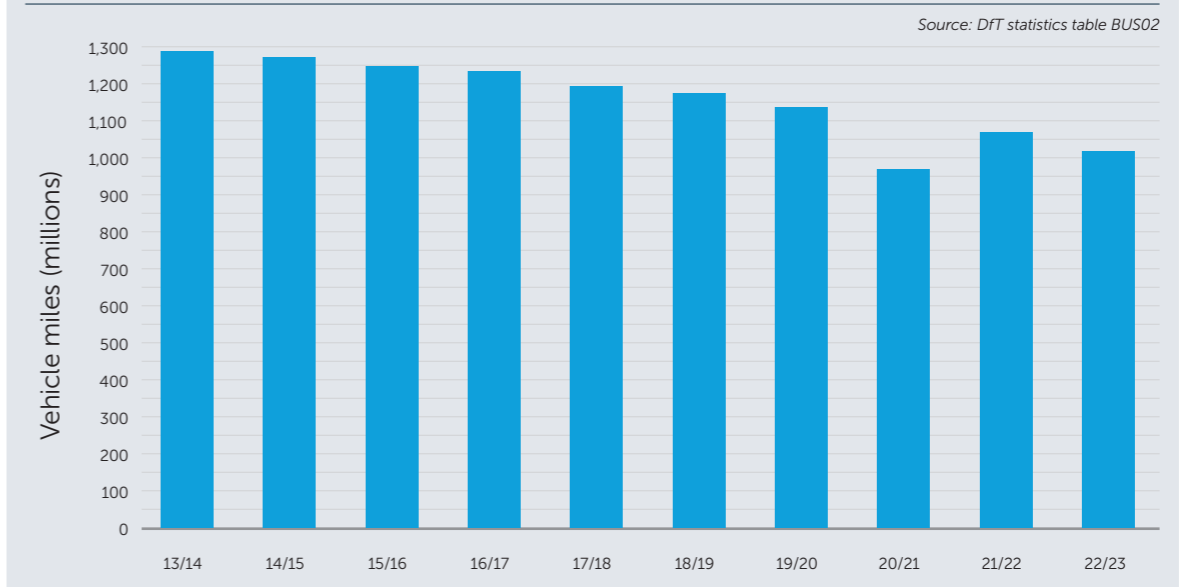
The rest of the city regions tell a similar story. With the exception of Merseyside (which has remained broadly stable), there has been a steady decline in bus patronage over the last 10 years.

Bus patronage in the city regions (outside London)



The reduction in patronage has placed greater strain on bus operator finances. The government introduced emergency funding throughout the Covid-19 pandemic to help protect bus networks. However, it appears that there has been an acceleration in the decline of mileage. More worryingly, there has been a further decline of bus mileage in 2023, which has occurred despite the patronage increases that year. This decline will further strip out bus networks, reduce frequencies, and act to make the bus a less attractive form of transport.

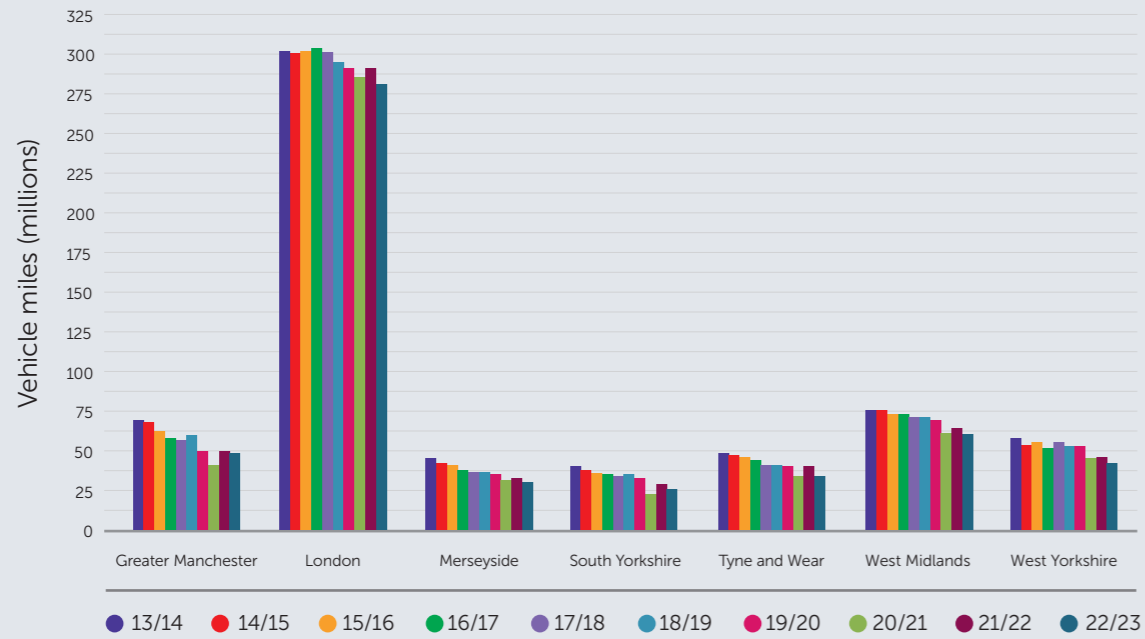
Bus vehicle miles in England



Nationally, bus vehicle miles sit at 86% of pre-Covid levels and 79% of the 2014 levels. However, there has been an uneven impact across the city regions, with South Yorkshire seeing its bus networks cut to 75% of 2019 levels.

Bus vehicle miles in the city regions

DfT statistics table BUS02



Summary

As the most used form of public transport, the bus continues to play a vital role in connecting people with opportunities. However, patronage has been in long term decline and services are disappearing. Vehicle miles have continued to fall following the Covid-19 pandemic, despite patronage increases in the last year. The removal of unprofitable services reduces the frequency of some routes and removes others completely, with limited local authority budgets increasingly unable to fill the gaps. The loss of network coverage presents a real barrier to accessing services and opportunities, which must be overcome if we are to level up the economy.

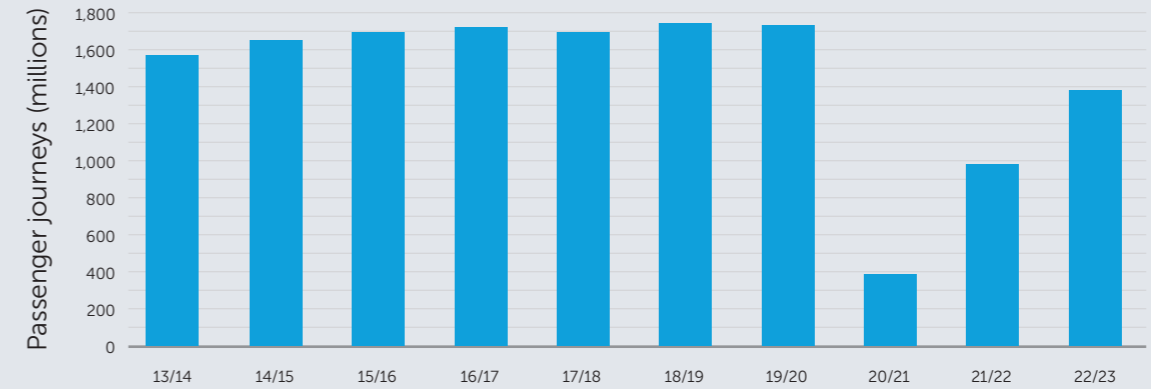
Rail

Rail plays a vital role in connecting our large city regions as well as providing a high volume of workers with fast access to congested city centres. However, strong growth in patronage has been hit by a combination of changing travel patterns, reducing service levels, extended strikes, and poor service levels on some networks.

Rail passenger journeys reached just under 1.4 billion trips in 2022/23, an increase of almost 400 million journeys on 2021/22. Whilst this represents a strong recovery from the lows of the Covid-19 pandemic, this is still 300 million journeys down on the 2019/20 level (a reduction of 20%) and 200 million down on the 2013/14 level.

Number of passenger rail journeys

Source: ORR statistics

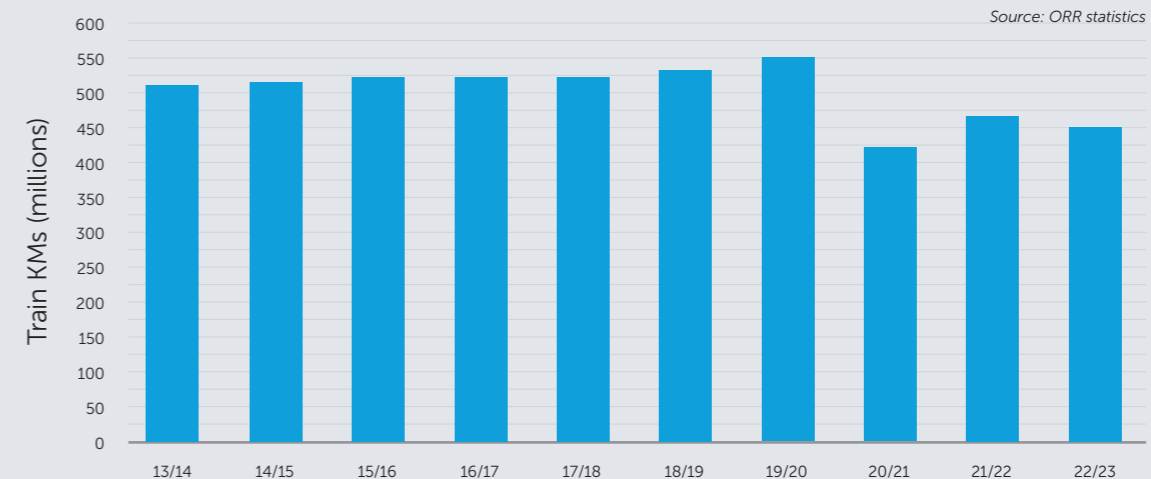


The reduction in office commuting is likely to have had an impact on rail networks, due to their propensity to carry commuters from the suburbs rapidly into the city centre.

Passenger rail services received government support through the pandemic to maintain service levels. However, after an increase in 2022, passenger train kilometres fell in 2023, now sitting at 81% of the pre-pandemic level.

Annual passenger train KMs

Source: ORR statistics

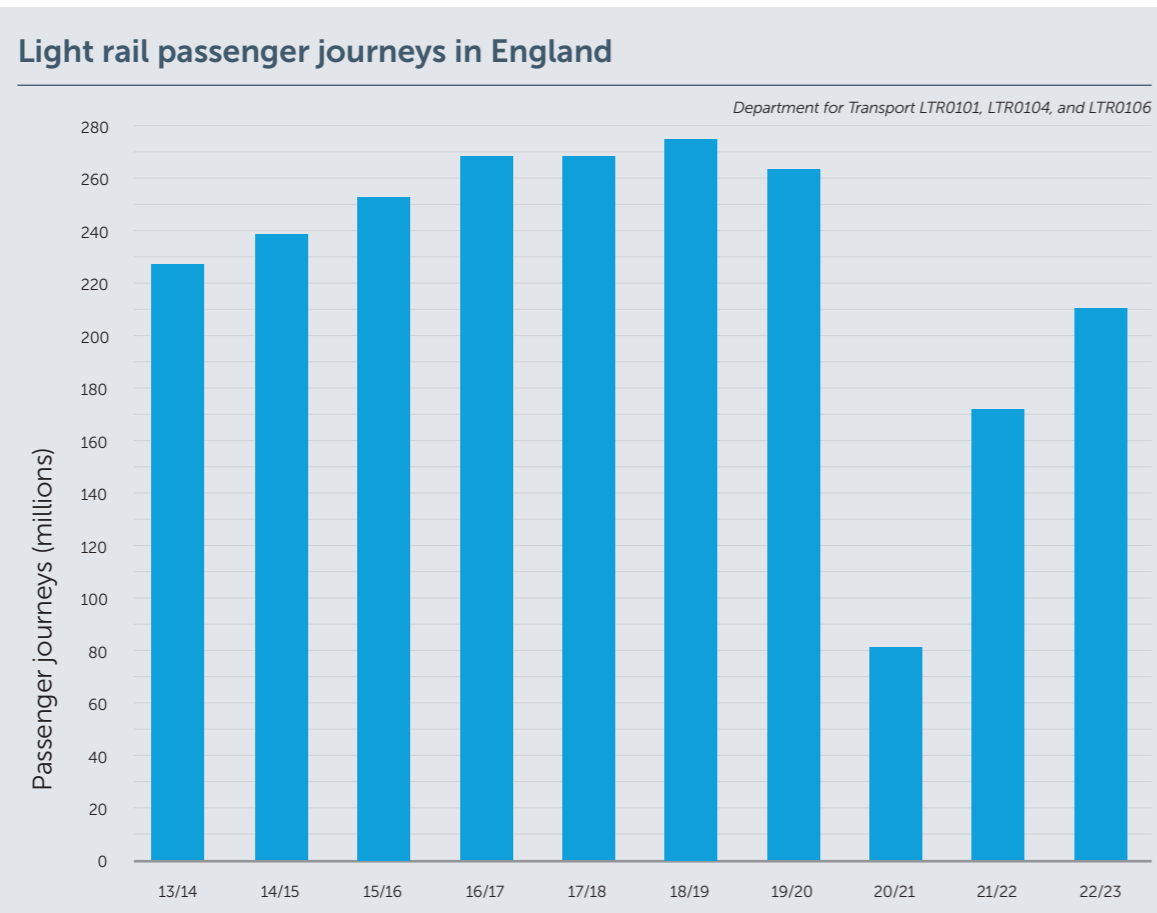


The reduction in service levels, coupled with changes to working patterns, on-going industrial action and reliability issues, presents a significant challenge to growing rail patronage.

Light Rail

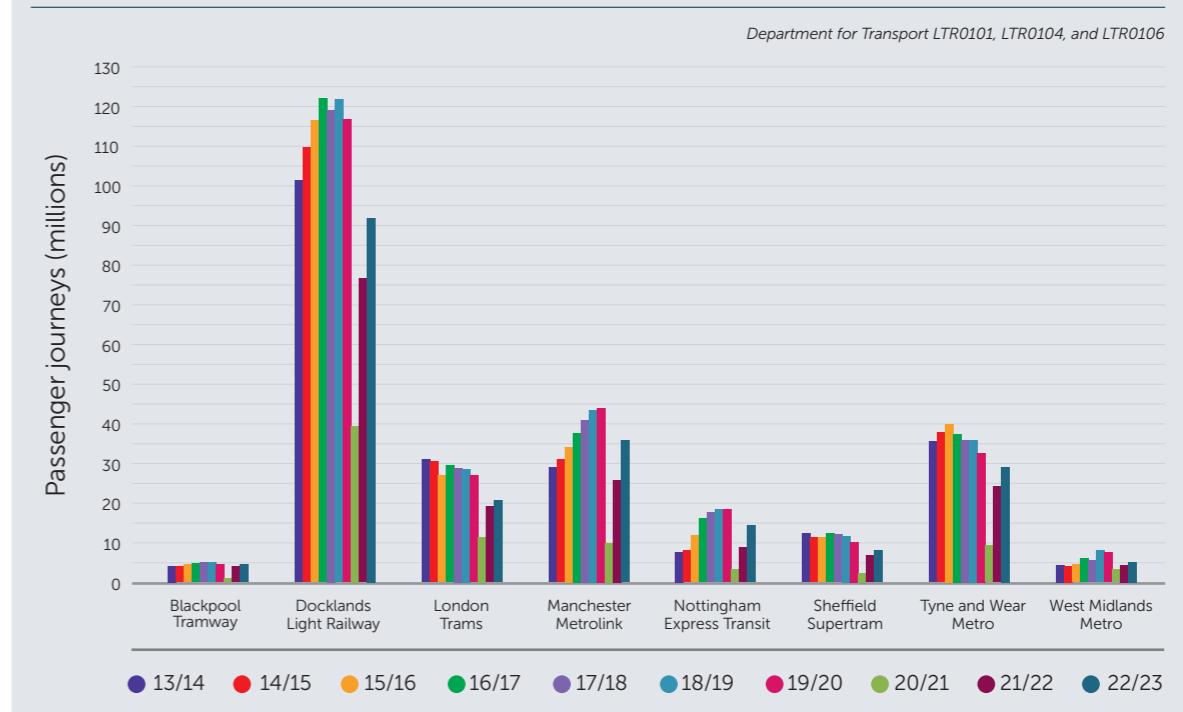
Light rail has seen somewhat of a boom in recent years, with extensions to existing networks, and new services and vehicles helping patronage to grow year-on-year. However, light rail's main strength – moving a large number of people from suburbs to city centres rapidly – has been hit hard by Covid-19 and the subsequent reduction in commuting. Although patronage levels are recovering, they remain below 2019 levels.

Between 2014 and 2020, light rail patronage in England increased by almost 40 million trips per year. Although there has been a strong recovery from the lows of 2019/20, patronage in 2023 was still 20% below pre-pandemic levels, but only 7% down on the 2014 level. Given that light rail patronage was growing we have also lost this additional growth on top of the trips that were already happening.



The reduction in patronage has been fairly even across all major light rail networks, with only the Blackpool Tramway (a largely tourist and leisure-based system) seeing patronage recover to pre-pandemic levels. Given that most systems do not receive revenue subsidy, passenger revenue is vital to their continued operation and investment in new vehicles and extensions.

Light rail patronage by network



Summary

Both heavy and light rail had seen strong patronage growth at the start of the last decade, which was subsequently disrupted by the Covid-19 pandemic. Their strength of moving large numbers of people from the suburbs to the city centre made them very popular modes for commuters and vital for allowing our city region economies to function.

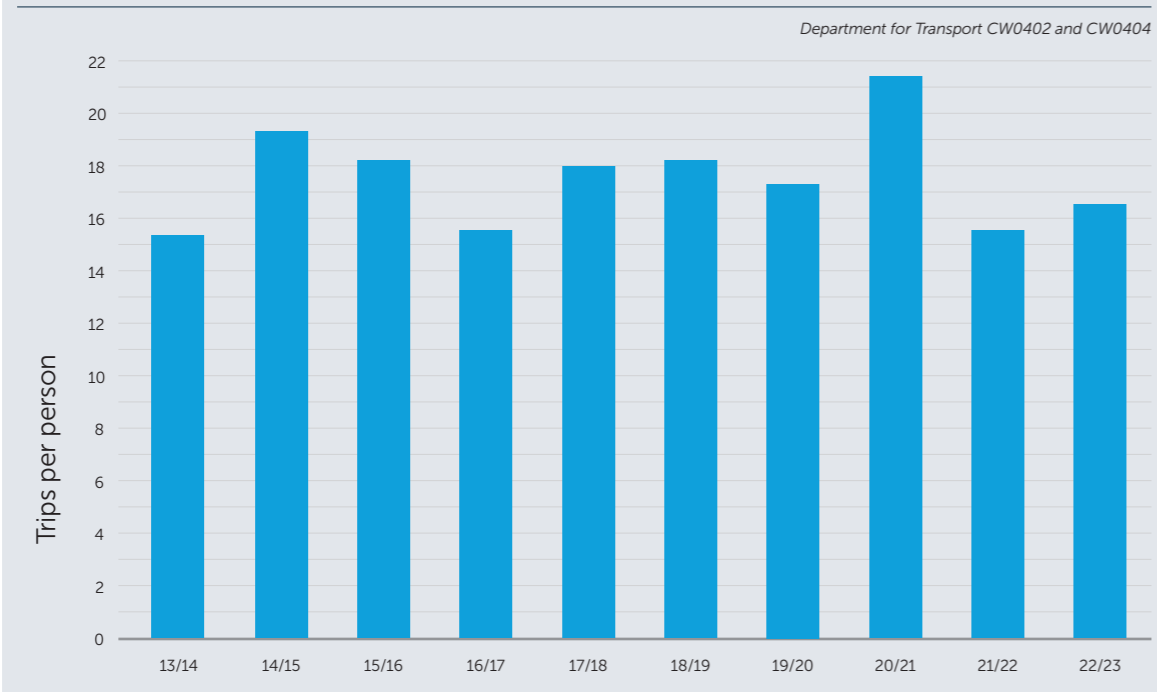
However, the reduction in the number of commuting trips and cuts to service levels mean that it will be difficult for the patronage recovery to reach pre-pandemic levels. This is especially challenging for light rail, which has traditionally received no operating (revenue) subsidy from central government and has also used net revenues to part fund extensions and renewals. This situation has been made worse by extremely high levels of cost inflation (particularly energy costs), which has further impacted on net revenues.

Active travel

Walking and cycling play a key role in our transport networks, both as trips in their own right, but also in enabling people to access other forms of public transport. Enabling people to cycle, walk and wheel provides a great opportunity to convert short car journeys to sustainable modes.

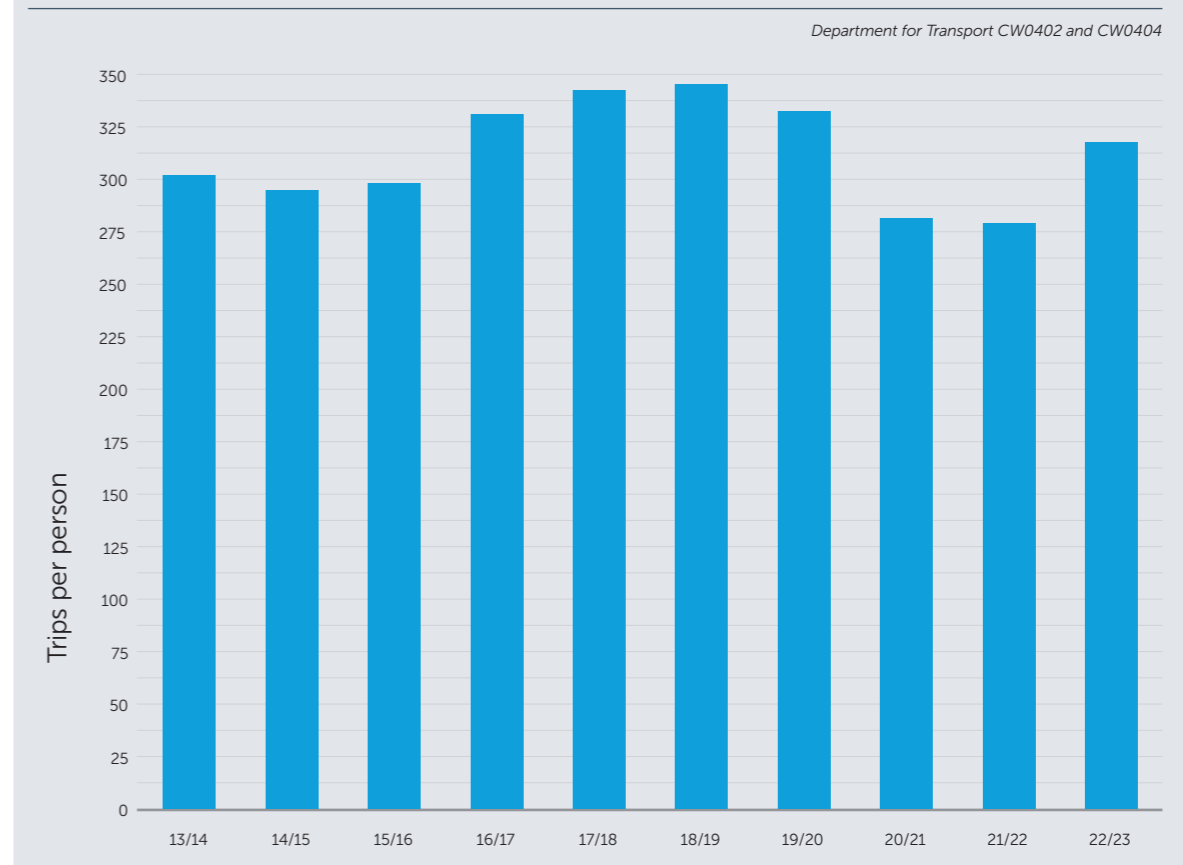
Cycling bucked its past trends in 2020 with a boom in trip numbers. This is largely due to people avoiding public transport (in line with government messaging) and having more time for exercise due to wider social restrictions. However, this trend has not lasted through the recovery, with the average person now making fewer cycle trips than they did before the pandemic, but still marginally more than in 2013.

Number of cycling trips per person



Walking is a very popular form of transport, with the average person making 318 walking trips a year, 10 trips a year higher than in 2013. However, walking levels fell during the pandemic and are yet to return to their pre-pandemic levels. The main reasons for going for a walk are to 'just walk', for leisure, and for education/escort to education. Trip rates are much higher in urban areas (332 trips per person per year) than they are in rural areas (245 trips per person per year).

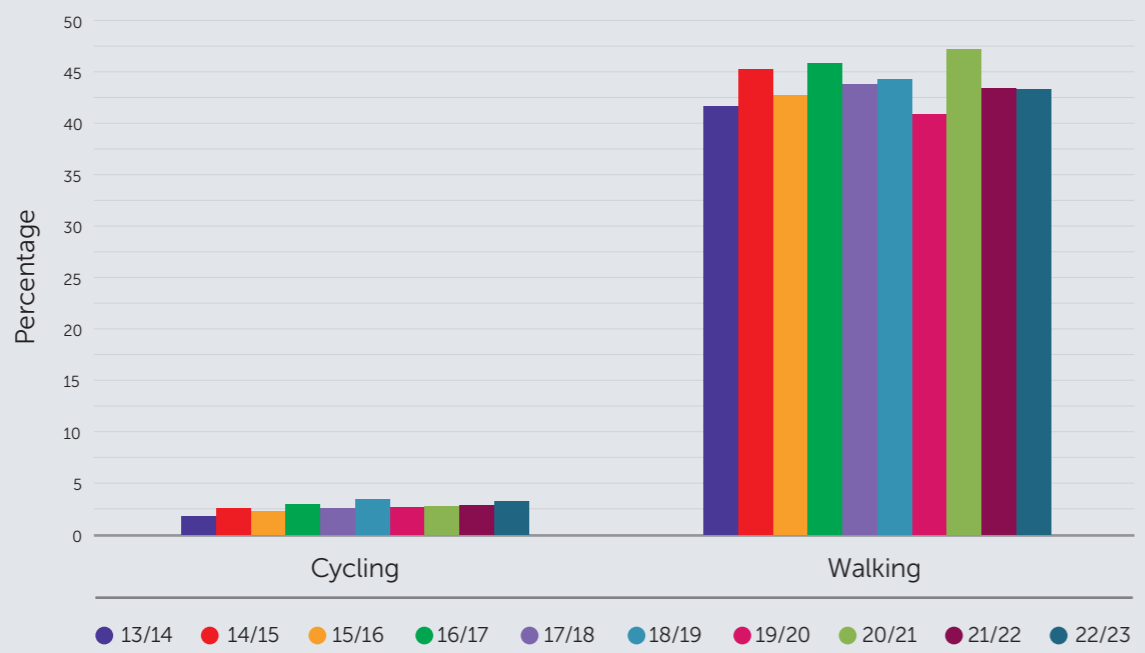
Number of walking trips per person



A key destination for walking trips is school, with 45% of children walking to school. Walking to school levels have increased by only 4% in the last decade. Cycling to school levels have nearly doubled over the last 10 years, although remain very low at just 3% of school trips.

Percentage of children travelling to school using active methods

Department for Transport CW0410



Summary

Active travel is a key part of our city region transport networks, both as modes of their own, but also as part of a trip involving wider transport modes.

Walking and cycling levels have both increased over the past decade but are yet to reach their pre-pandemic levels. If we are to achieve wider goals around levelling up and decarbonisation, active travel modes must play their full role in providing people with cheap, accessible, and easy access to opportunities.

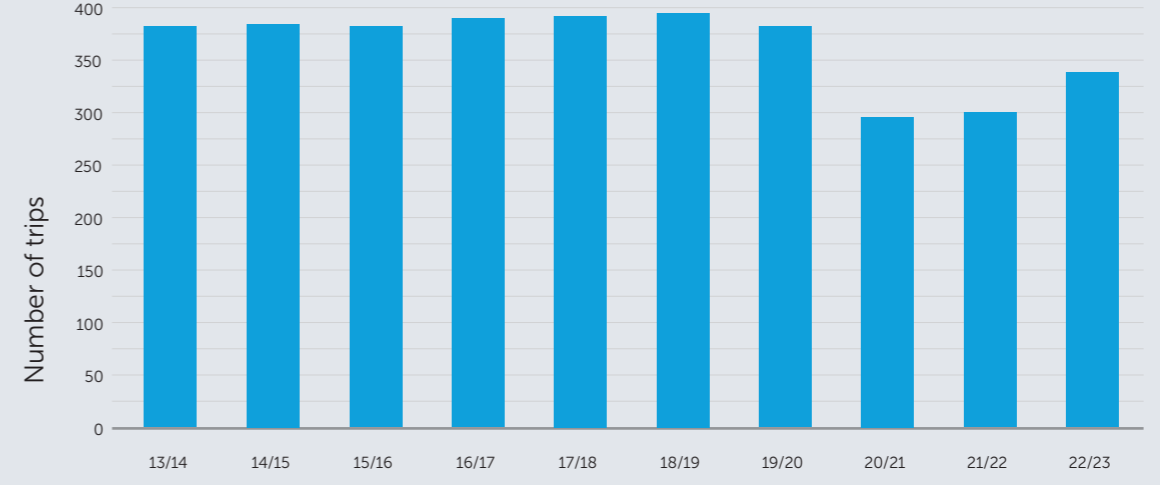
Car and van

Trips as a car or van driver have remained relatively stable over the past 10 years, with trip numbers remaining constant between 2013 and 2019. Trips in a car also experienced significantly less disruption through the pandemic years, with people moving away from public modes to travel in the "safety" of their own car. Due to this, traffic levels remained much higher than public transport patronage over the pandemic, reducing the level of recovery required.

In 2022, each person made 336 trips as a car driver, just 10% lower than 2019 levels. In many areas it is now being reported that car usage has reached pre-pandemic levels.

Number of trips as a car or van driver

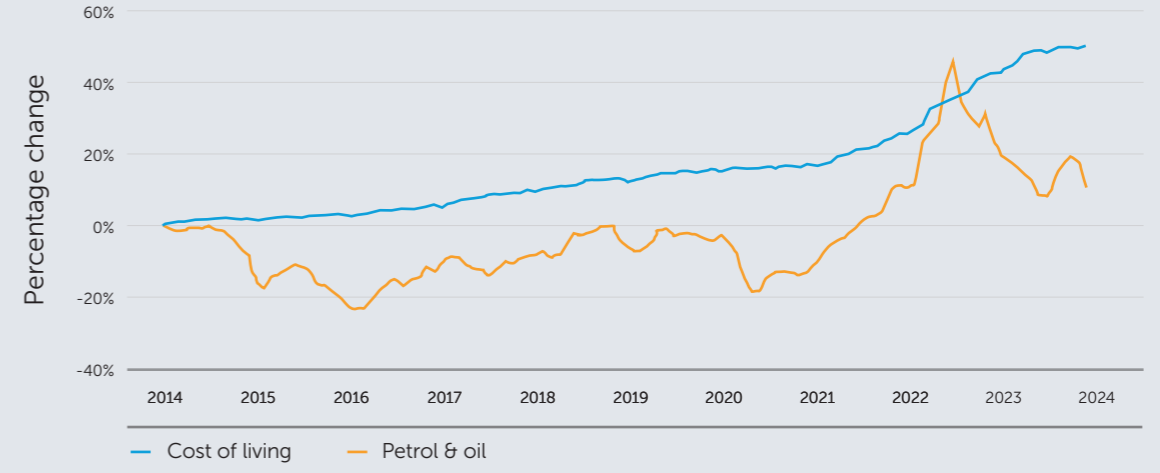
Department for Transport NTS0303a, NTS0303d, and NTS0303f



The cost of motoring has continued to increase at a below inflation rate. Research from the RAC foundation shows that petrol and oil prices have increased by 10% over the past decade, which compares to an overall cost of living increase of 50%. This presents a challenge to other modes of transport which have seen higher cost increases.

Change in the cost of motoring

RAC Foundation (Source ONS)



Summary

The car remains king when it comes to making trips. Although trip numbers did reduce through the Covid-19 pandemic, they did not fall as far as other modes and have recovered faster. Many places are now reporting that traffic levels and the associated congestion have reached pre-pandemic levels, despite overall trip numbers still being suppressed.

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