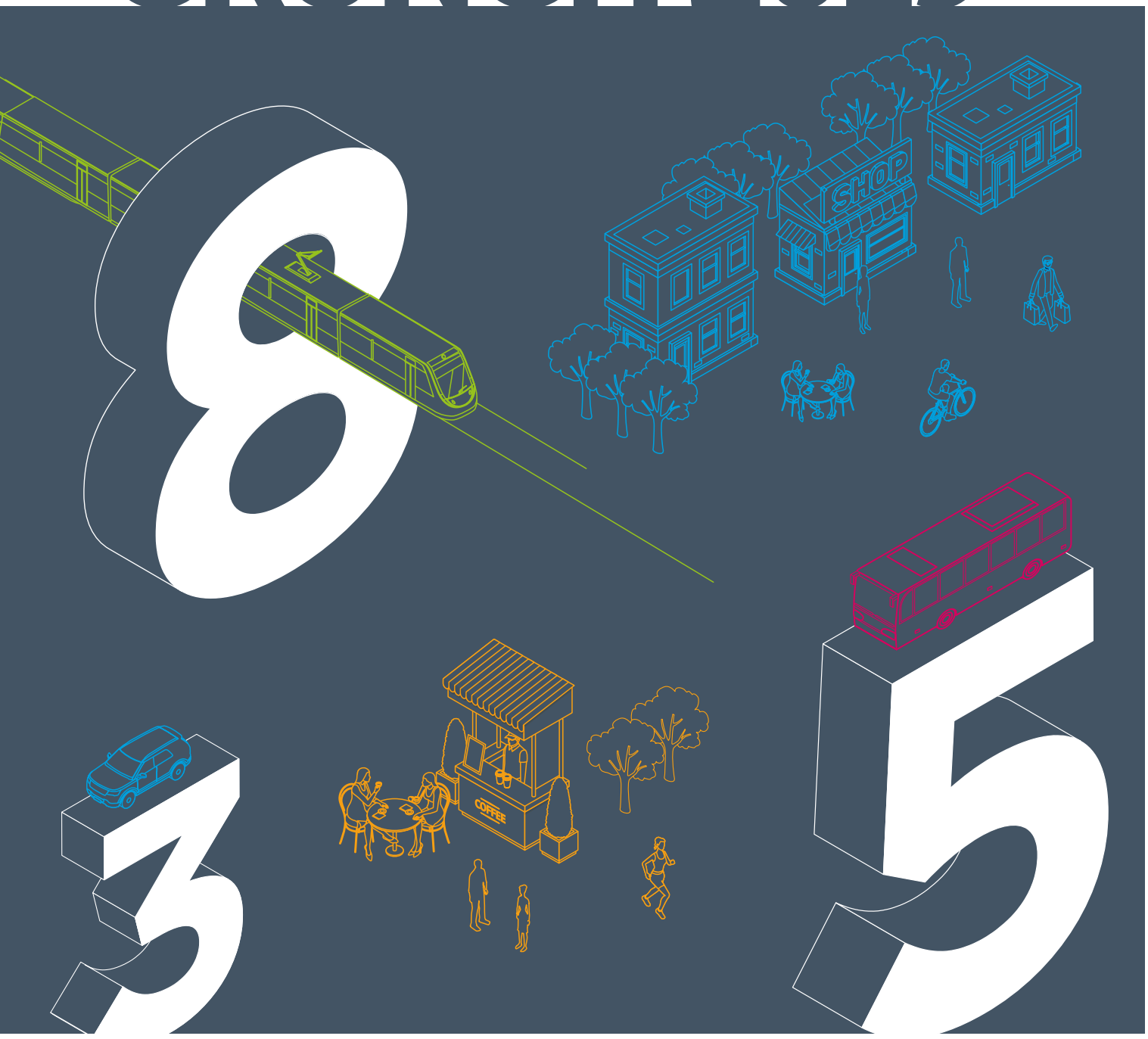
NUMBER CRUNCH 2019



URBAN TRANSPORT TRENDS IN CHANGING TIMES

URBAN TRANSPORT GROUP

INTRODUCTION

We are living in rapidly changing times. Big shifts are taking place in urban transport trends. As well as the ever present influence of the economy over travel demand we are now also witnessing more recent transformative social changes kicking in – most notably in the decline of the traditional regular daily commute.

Meanwhile, the city regions are also changing, with growing economies and populations. This is giving rise to significant housing demand with major implications for coordinating new housing with transport investment. At the same time, the city regions continue to be home to growing social inequalities – not helped by the continuing decline of the bus, on which the poorest are most reliant. Where there is investment, active travel is growing rapidly – particularly in city centres which are transforming into places for people rather than places for vehicles. Rail use is also on the up where it makes the most of its intrinsic strength – its ability to get large numbers of people into booming urban centres, quickly.

In these changing times the case for coordinated and integrated transport planning at the city region level is stronger than ever. So is the case for long term funding frameworks for local urban transport rather than stop-start funding as is currently the case – investment which could switch more short journeys from the car to active travel, investment into expanded rail networks to improve access to urban centres, and investment to open up more housing sites, as well as for emergency measures to staunch the bleeding out of bus networks which are key to social cohesion. This report is the second in our *Number crunch* series. In this edition, we provide an updated overview of the key trends over the last ten years, as well as taking a look at what the new and most recent data is telling us.

We investigate some new issues – including housing need and social inclusion. We have also improved the analysis by using more local city region data to augment national data.

The report uses our online tool for transport data – the Data Hub – to crunch the numbers, and to identify some of the key transport, economic and demographic trends for our largest urban areas. Our focus is on the six Metropolitan areas (Greater Manchester, Merseyside, Tyne and Wear, West Yorkshire, South Yorkshire, West Midlands) and London, which we collectively refer to as the city regions. Where we refer to the Metropolitan areas only, we do not include London. Together, they are England's main conurbations with a total population of almost 21 million people. They are also functional economic areas with their own transport networks.

City regions cover both the core city with the wider sub region in which the core city sits – given that local transport systems and economies function at this city region level. Analysis at this spatial level brings with it its own complexities. However, it can be much more helpful than analysis that splits out cities from the wider economies and travel footprints in which they sit – especially given that very few of the largest major cities in the UK standalone rather than being part of larger conurbations.

This report and our Data Hub are part of the Urban Transport Group's mission to be at the heart of a transport debate, driven by good data and analysis. We encourage people to visit the Data Hub to select transport data, visualise this through graphs and charts, and share these visualisations on websites, social media or in presentations.

Visit the Data Hub at
urbantransportgroup.org/insight

CONTENTS

Authors: Tom Ellerton and Jonathan Bray. June 2019.

CHANGING CITY REGIONS

GROWING CITY REGION POPULATIONS ARE INCREASING HOUSING DEMAND, WHICH IMPACTS ON TRANSPORT NETWORKS

EDUCATION LEVELS IN CITY REGIONS OUTSIDE LONDON ARE BELOW THE NATIONAL AVERAGE, WITH ABOVE AVERAGE LEVELS IN LONDON

CITY REGION ECONOMIES CONTINUE TO GROW, WITH LONDON AND THE WEST MIDLANDS HAVING THE LARGEST PERCENTAGE GROWTH

ECONOMIC, SOCIAL AND DEMOGRAPHIC CONTEXT

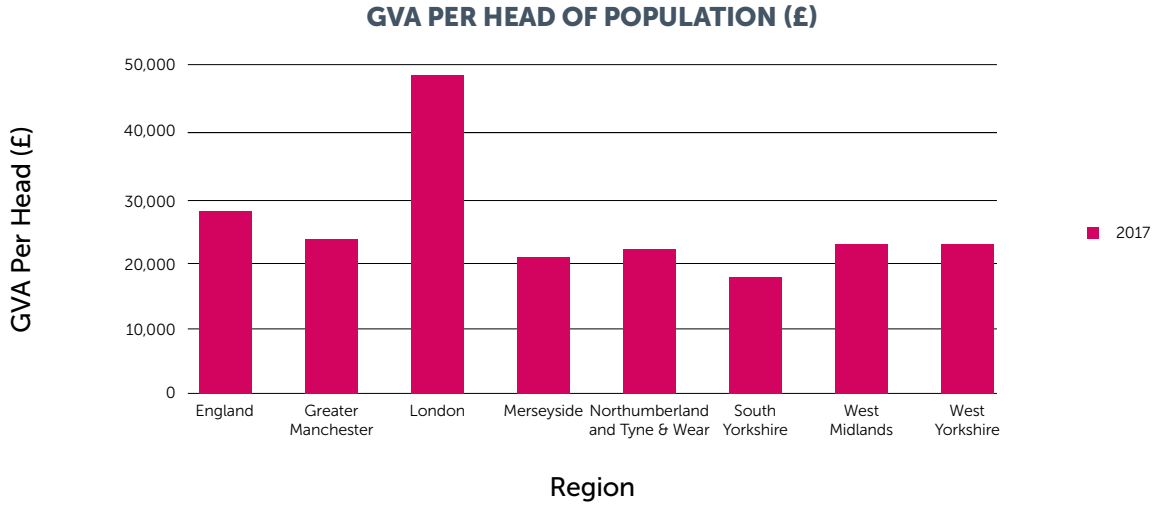
CITY REGION ECONOMIES AND POPULATIONS ARE GROWING – AS IS THE DEMAND FOR HOUSING. SOCIAL CHALLENGES REMAIN ACUTE WITH THE CITY REGIONS HOME TO SOME OF THE POOREST COMMUNITIES IN THE COUNTRY.

Economy

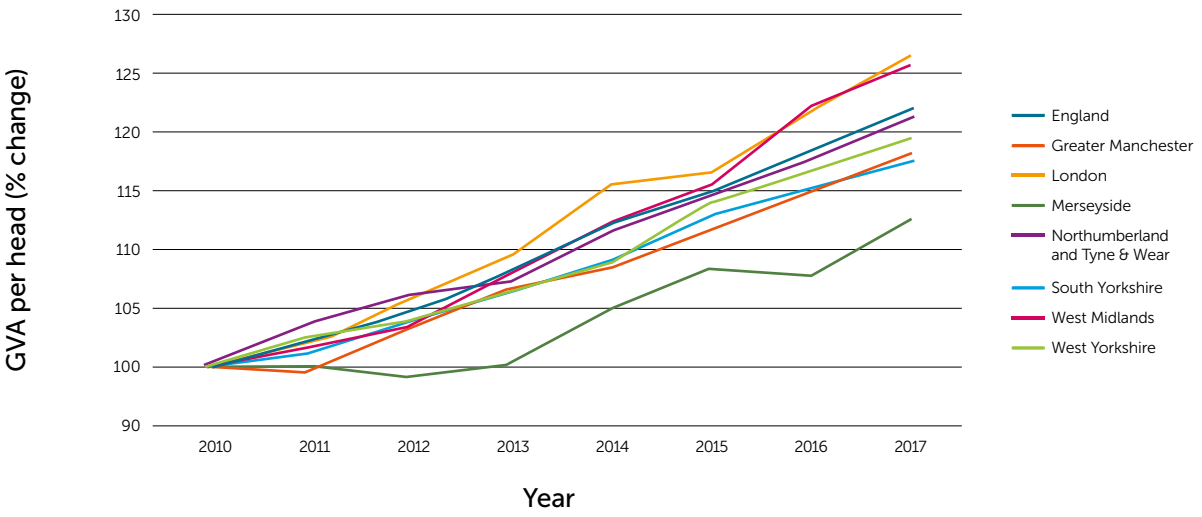
If the economic geography of England is complex then so are the economic geographies of the Metropolitan areas themselves, which contain thriving central business districts and advanced manufacturing centres alongside some off the country's biggest pockets of deprivation, as well as suburbs, post-industrial towns and rural hinterlands. These complexities need to be borne in mind when looking at the overall economic performance of city regions as a whole.

London has by far the strongest economy with a GVA per head of population of £48,897. The Metropolitan areas are under-performing the English economy as a whole.

Looking at economic trends since 2010, London and the West Midlands (the star performer of the Metropolitan areas) are the city regions that have had the largest percentage growth in their economies[1]. There is then little difference between the other cities and the England average, except for Merseyside which took longer to recover from the 2007 recession.



PERCENTAGE CHANGE IN GVA PER HEAD SINCE 2010



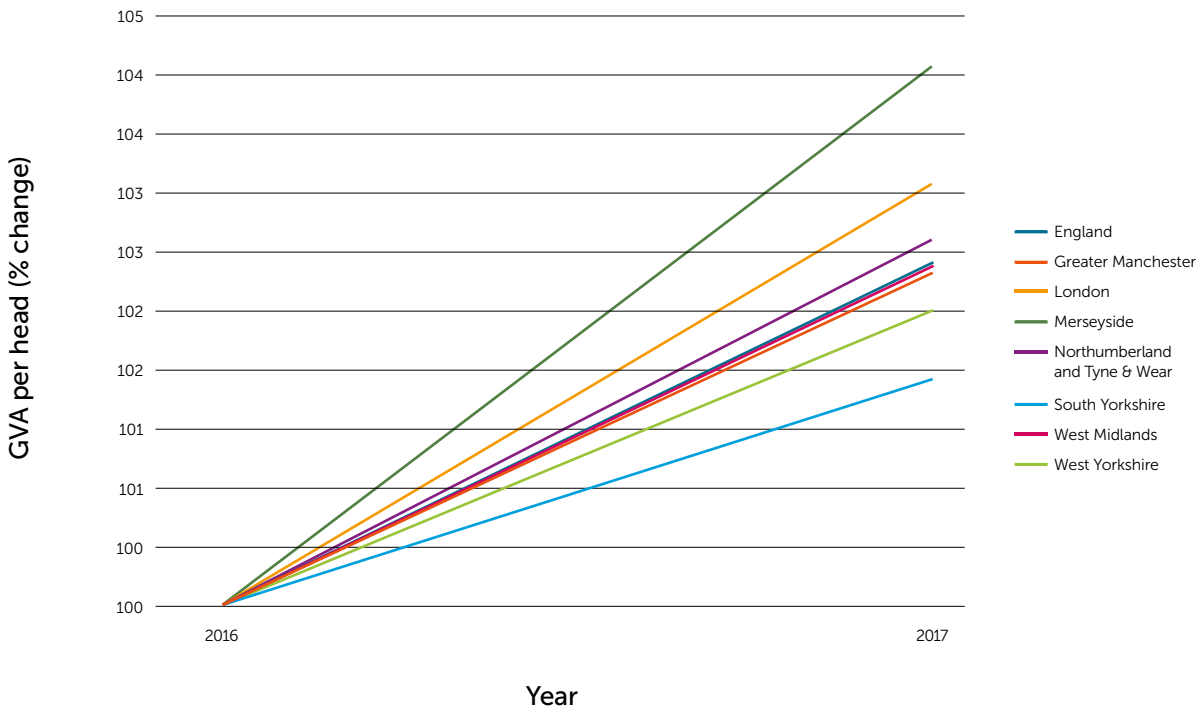
When we look at the rate of change between 2016 and 2017 (the most recent years available), five of the seven city regions had a growth rate above the England average, with Merseyside seeing the largest percentage growth[2] following its slower recovery than elsewhere since 2010.

As the economic geography of cities regions are complex, so too are the factors which drive these economies and the way which that influences travel demand. For example, in the North East, Nexus has identified business confidence as being closely linked to Metro patronage. Where business confidence increases, it appears there is an 18 month time lag before there is an increase in Metro patronage. This is likely to relate to decisions around staffing and pay, which impact on the demand for travel and the level of disposable income available.

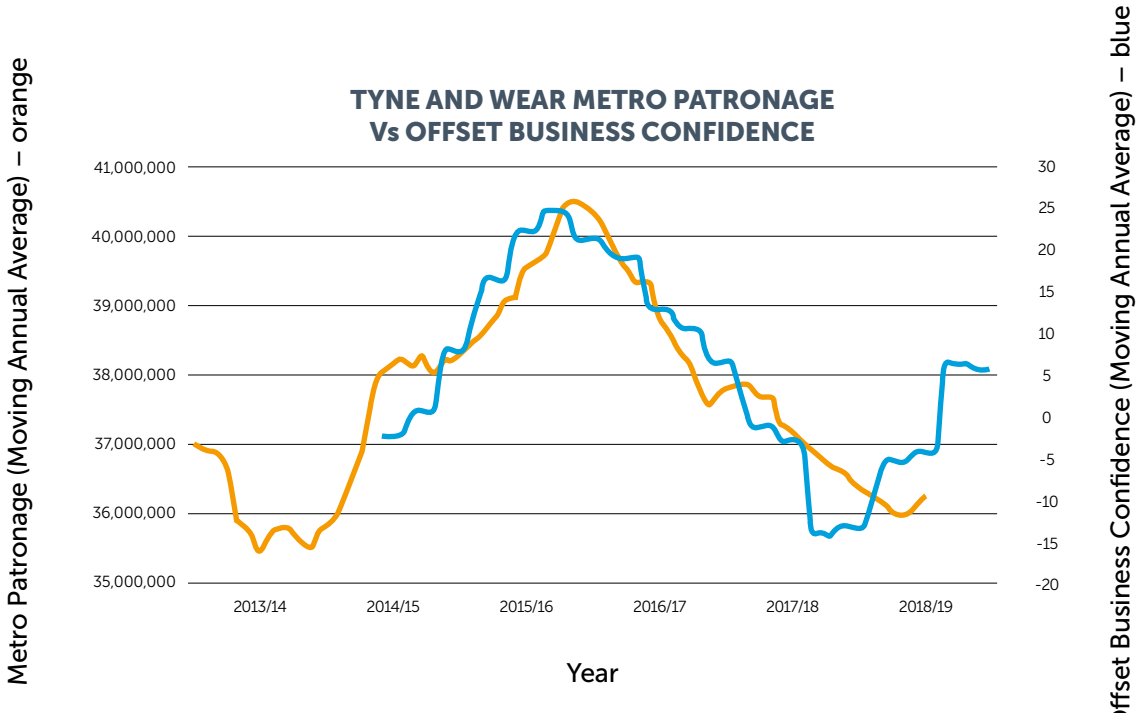
Meanwhile, research in London has found that an economy growing more slowly than anticipated, alongside reduced inward migration and household incomes falling behind living costs, has contributed to a reduction in bus travel, particularly for discretionary trips. A report by Transport for London which explores the factors affecting travel demand trends in London, highlights the prolonged squeeze on personal disposable income since the 2008 financial crisis as a key factor[3]. This is having a knock-on effect on consumer spending for 'discretionary' activities such as shopping and leisure, suppressing demand for travel, with the number of leisure trips now 20% lower than in 2013/14[4].

1. ONS Economic Data
2. ONS Economic Data
3. Transport for London, Travel in London Report 11, http://content.tfl.gov.uk/travel-in-london-report-11.pdf
4. Transport for London, Travel in London Report 11, http://content.tfl.gov.uk/travel-in-london-report-11.pdf

PERCENTAGE CHANGE IN GVA PER HEAD IN THE MOST RECENT YEAR



TYNE AND WEAR METRO PATRONAGE Vs OFFSET BUSINESS CONFIDENCE



Society

Alongside booming central business districts and wealthy suburbs, the city regions are also home to some of the poorest places and communities in the country.

The six core cities in the metropolitan areas are among the 31 Local Authorities which have the highest proportion of the most deprived places, as measured at the level of Lower Super Output Areas (LSOAs)[5, 6]. Three of the six core cities in the metropolitan areas are in the top ten, with Liverpool fourth. London Boroughs are further down the list with Tower Hamlets (25th) and Hackney (50th). This reflects the way in which London Boroughs contain very different levels of prosperity.

Despite being home to many universities, in general, education levels in the Metropolitan areas are below the national average. However, in London the reverse is true, suggesting a potential 'brain drain' to the capital.

There is a strong link between car ownership and levels of household income. This is illustrated in Birmingham, where the Ladywood and Harborne areas are similar distances from the city centre. However in Ladywood, the number of households with no access to a car stands at 64%, whilst it is only 18% in wealthier Harborne. In Liverpool, 40% of households in the Speke Garston area (seven miles from the city centre) have no access to a car. Speke Garston is one of the most deprived neighbourhoods in the country according to the Index of Multiple Deprivation.

Proportion of LSOAs in the most deprived 10% nationally

Local Authority	Proportion of LSOAs in most deprived 10% nationally	Rank of LSOAs in most deprived 10% nationally
Liverpool	45%	4
Manchester	41%	5
Birmingham	40%	6
Newcastle	22%	30
Sheffield	23%	26
Leeds	22%	31

Percentage of people with no or Level 4 (or above) qualification

Area	Percentage with no qualification	Percentage with Level 4 qualification or above
Greater Manchester	25%	24%
Inner London	16%	45%
Merseyside	27%	22%
Outer London	19%	33%
South Yorkshire	28%	21%
Tyne and Wear	26%	22%
West Midlands	29%	21%
West Yorkshire	26%	24%
England	22%	28%

5. Lower Super Output Areas contain an average of 1,500 people
6. The English Indices of Deprivation 2015, https://www.gov.uk/government/statistics/english-indices-of-deprivation-2015

Population and housing

Over the last decade there has been rapid growth in the numbers of people living in the city regions, with the population of London growing by 13%, West Midlands by 9% and Greater Manchester by 7%[7]. This compares with average population growth for England as a whole of 7% (although this figure is skewed upwards as it includes London).

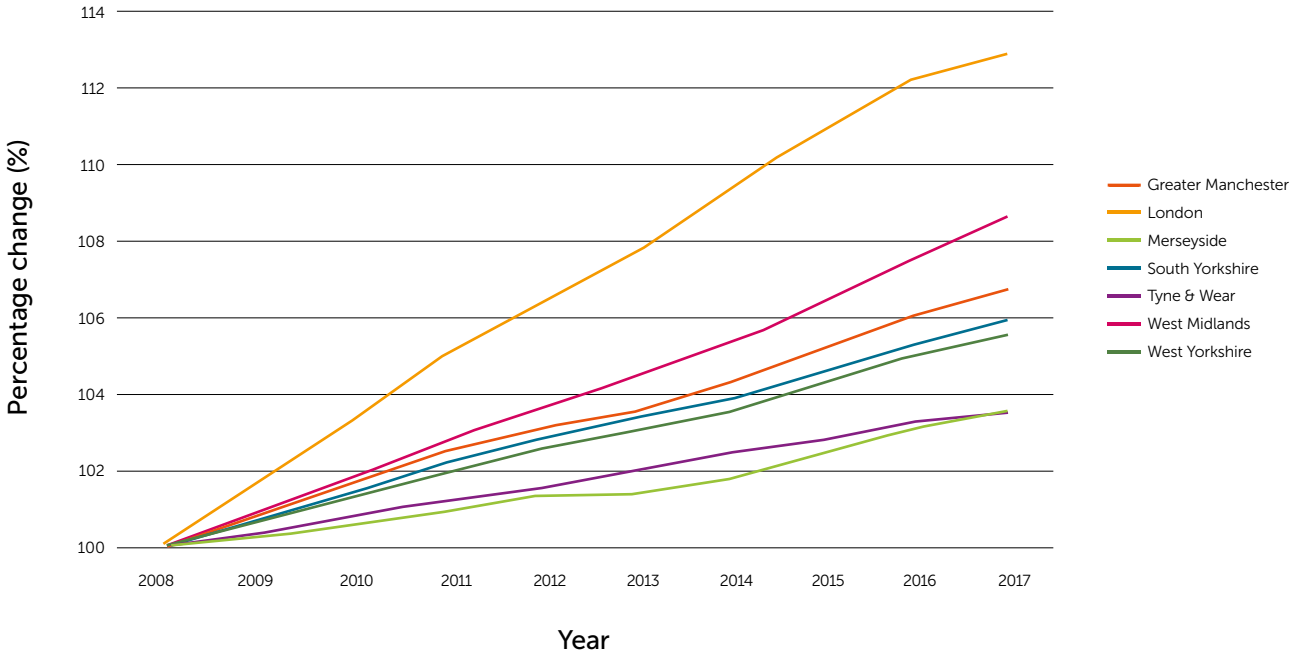
Furthermore, population forecasts predict this high level of growth is set to continue up to at least 2030, when the current predictions show a levelling off across the country.

The age group that is predicted to see the largest growth in the city regions is the over 75s, which will grow by between 50% and 80% by 2040. This compares to overall population growth in the city regions of between 5% and 17%. An ageing population brings with it significant implications for the nature of transport provision in the years to come.

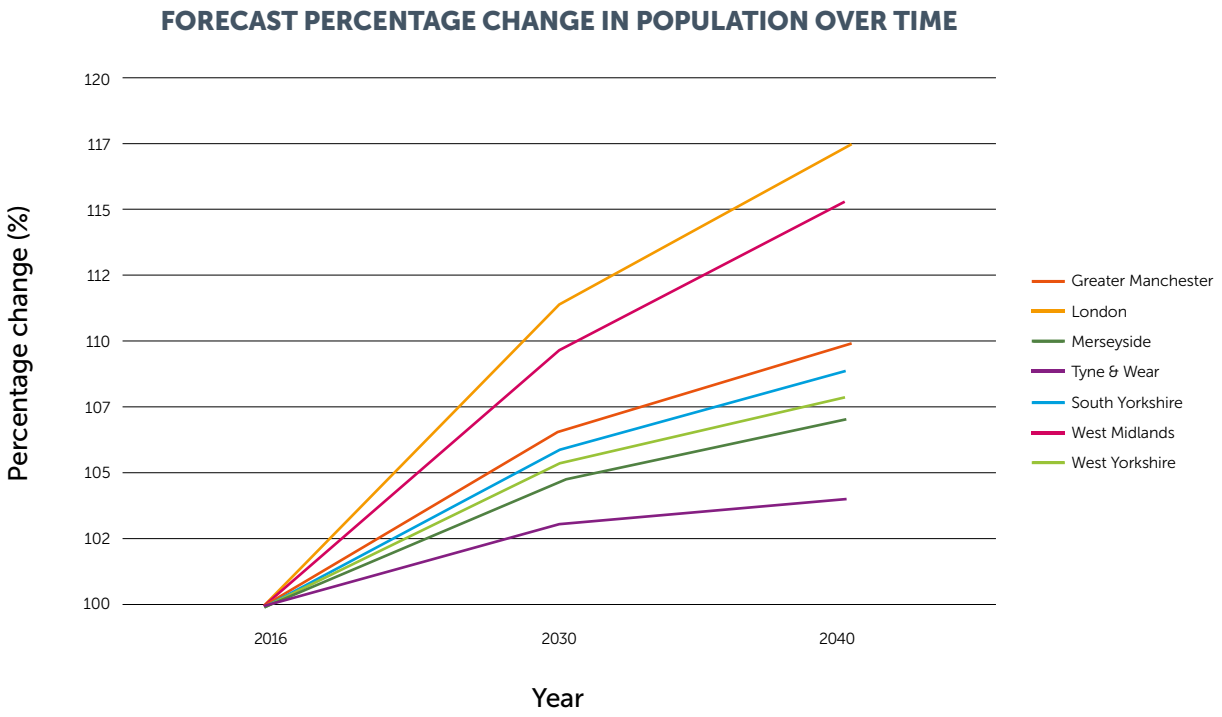
Recent, and projected, population growth in the city regions feeds into housing demand, which in turn requires transport networks able to serve and accommodate growing populations and new housing developments.

Across England 220,000 new dwellings were built between 2017 and 2018, with many of these new developments in city regions[8]. Projected housing requirements are also high. For example, Leeds' five-year land supply update in 2018 shows a requirement of 70,000 new dwellings between 2012 and 2028, which works out at over 4,000 new dwellings a year[9]. In Manchester, the figure is 63,000 new dwellings between 2003 and 2021, a rate of 3,500 per year[10]. Birmingham requires 51,100 new dwellings between 2011 and 2031, a rate of 2,500 per year[11].

PERCENTAGE CHANGE IN POPULATION IN THE LAST DECADE



7. ONS mid-year population estimates
8. Centre for Cities, Housing Health check – how many homes have English cities built over the last year, https://www.centreforcities.org/blog/housing-health-check-how-many-homes-have-english-cities-built-over-the-past-year/
9. Leeds City Council, Five year land supply statement, https://www.leeds.gov.uk/docs/C-SHLAA%202018%20-%20Five%20Year%20Supply%20Statement.pdf
10. Manchester City Council, Five year assessment of land supply, file:///C:/Users/eller/Downloads/5_Year_assessment_of_land_supply_for_housing.pdf
11. Birmingham City Council, Five year land supply, file:///C:/Users/eller/Downloads/Five_Year_Land_Supply_2018_to_2023.pdf
12. http://www.urbantransportgroup.org/resources/types/reports/place-be-how-transit-oriented-development-can-support-good-growth-city



ANALYSIS

City region economies are growing, although their economic performance and the rate at which their economies are growing, differs between city regions. It also varies within city regions which contain some of the most thriving places in the UK and also some of the poorest and disadvantaged places in the country. Long term investment in transport provision will be key to sustaining and supporting good growth in the city regions and providing access to opportunity for all. Over the last decade the Urban Transport Group has assembled a comprehensive case for the benefits of investing in urban transport which is informing our case to the Comprehensive Spending Review (CSR). A key part of our case to the CSR is the need for more stable long term funding for local transport spending (which has become too short term and competition-based) so that city region transport authorities can make long term and integrated transport plans for addressing the complex economic and social challenges that city regions face.

City region populations have also grown over recent years, and are forecast to further increase. The provision of housing will be key to enabling this population growth.

In our recent report *The place to be*[12], we made the case that Transit Oriented Development (where housing development of sufficient density is well served by public transport and easy to get around by bike and on foot) should be key to meeting housing need in the city regions. This requires a supportive national land use planning framework, investment in expanded rail networks as well as more resources for local authority planning.

CHANGING TRAVEL PATTERNS IN A CHANGING WORLD

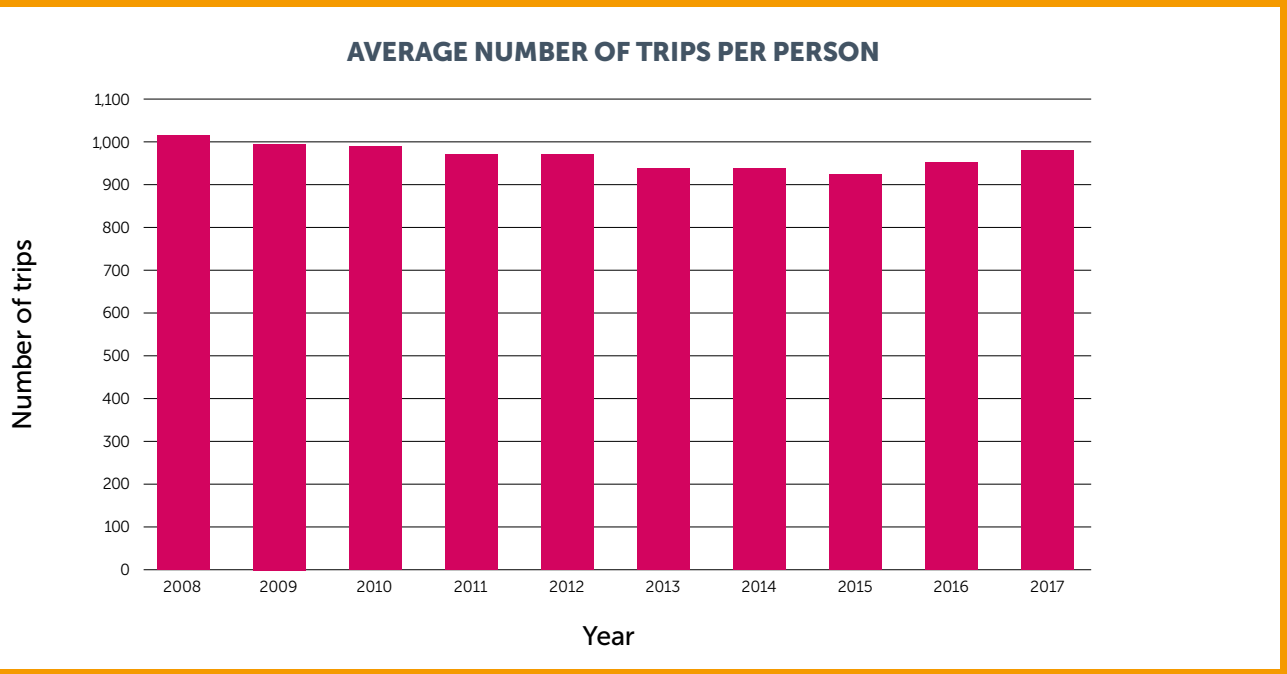
BIG CHANGES ARE TAKING PLACE IN WHY AND HOW OFTEN PEOPLE TRAVEL – INCLUDING THE DECLINE IN THE TRADITIONAL, DAILY COMMUTE.

WHILST THE CAR IS STILL KING NATIONALLY, THE LARGEST URBAN CENTRES HAVE SEEN A SHIFT TO PUBLIC TRANSPORT, WALKING AND CYCLING.

The journeys people make, and the way they make them, is the result of a wide range of factors. The state of the economy is a constant influence but there have also been longer term trends at play (including changing land use patterns and the shift to mass motorisation) and more recently, the impact of transformational social and technological shifts which have led to big changes in how and where people work.

All of these factors provide the backdrop for how people are using different transport modes – something we explore later in this report.

The National Travel Survey shows that the average person is making 40 less trips each year than a decade ago[13] although there was an increase last year with more short walking trips being recorded[14].

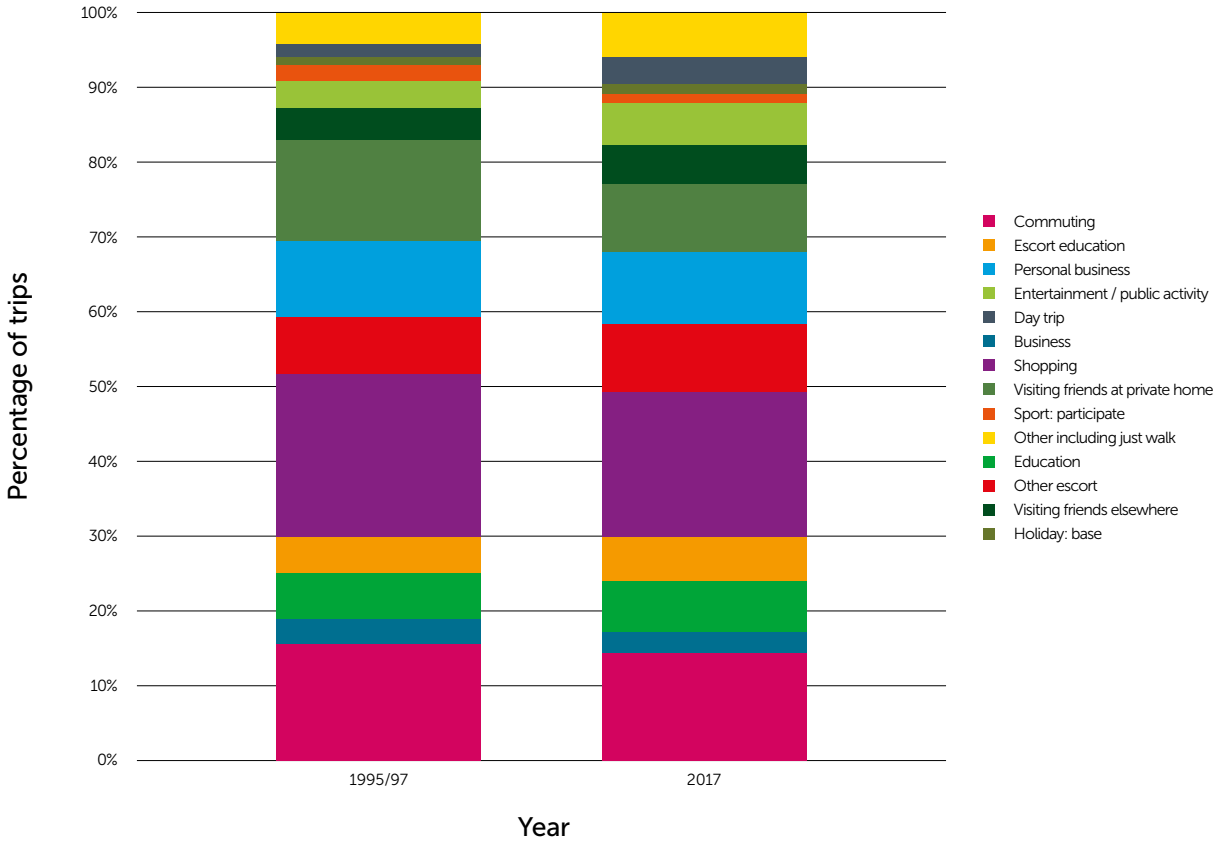


Meanwhile, there have been significant shifts in the reasons why people make trips with the number of commuting, shopping and leisure trips that we make in decline[15]. Commuting to work has been the traditional raison d'etre of public transport, providing a high volume of regular journeys.

However, with changes to working patterns and more home working, people are now commuting less often. This is true for both full and part time workers[16].

The move away from the traditional regular daily commute has significant implications for public transport provision in general, and for ticketing for commuter travel, in particular.

CHANGE IN TRIP PURPOSE BETWEEN 1995/97 AND 2017

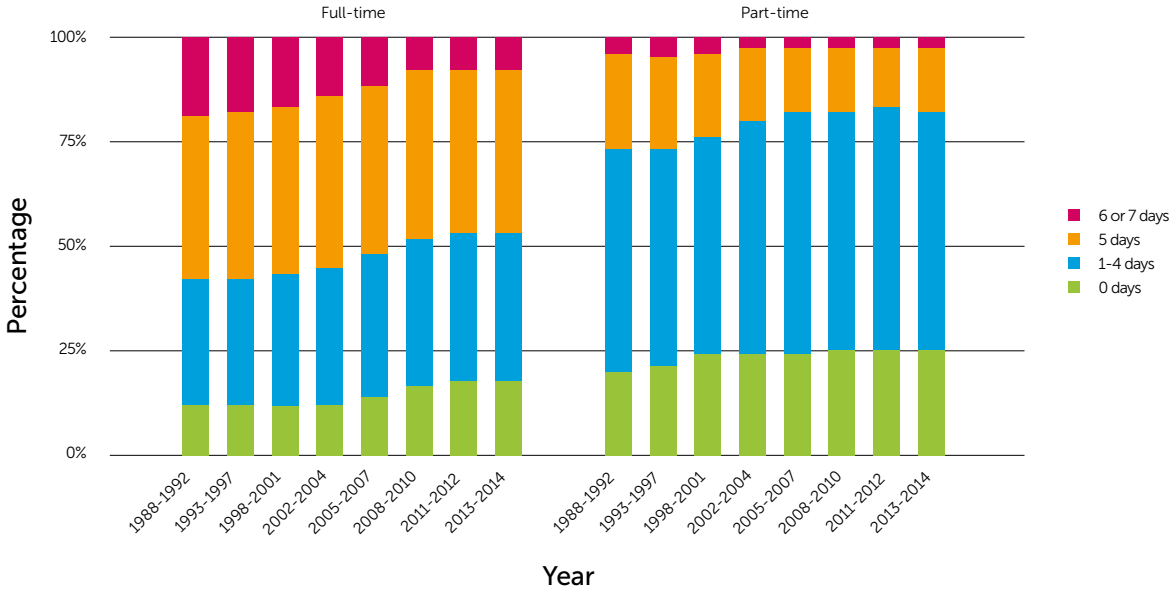


13. Much of this change is accounted for by an increase in short walks. Although there is still a small increase if these are excluded.
14. National Travel Survey Table NTS0303
15. National Travel Survey Table NTS0409
16. Department for Transport, 2015, Commuting trends in England 1988-2015, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/657839/commuting-in-england-1988-2015.pdf

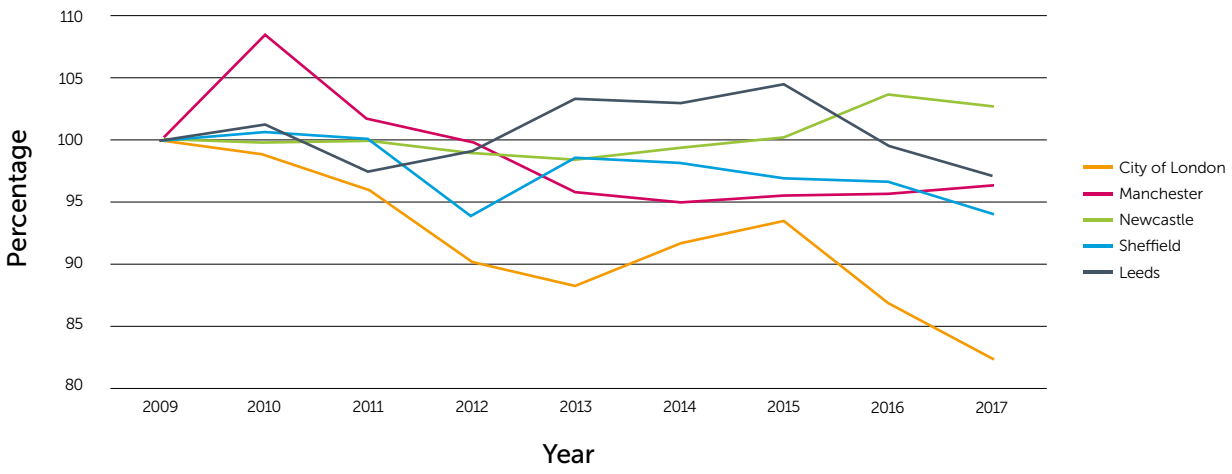
Not only are trip purposes and frequencies changing but so too are the choices that people are making on how to travel. Although nationally the car continues to be the most common form of transport with an average of 390 trips per person per year,[17] we are seeing a different trend emerge in the largest urban centres where car use has begun to decline[18].

Traffic surveys (known as 'cordon counts') are starting to show a reduction in the number of cars entering the city centre during the morning peak in some, but not all, major urban centres in the city regions. A more detailed analysis of commuter trips into Birmingham reveals a significant shift towards heavy rail which has increased by 35% in the last six years[19]. In the morning peak, public transport is now responsible for 64% of all trips, with car trips falling to 36% at a time when the overall number of journeys into the city centre is increasing.

AVERAGE NUMBER OF DAYS COMMUTING BY FULL AND PART TIME WORKERS



CHANGE IN THE NUMBER OF CARS RECORDED IN CORDON COUNTS



17. National Travel Survey Table NTS0303
18. Cordon Count Data from Local Authorities
19. Travel Trends in the West Midlands report
20. The low Metro count in 2015 was due to engineering works

THE NUMBER OF TRIPS MADE BY MODE INTO BIRMINGHAM DURING THE AM PEAK

Mode	2011	2013	2015	2017
Bus	25,749	25,179	25,315	23,424
Rail	27,798	27,506	35,085	37,567
Metro	1,687	1,538	299[20]	1,616
Car	37,256	39,751	35,658	35,081
Total	**92,490**	**93,974**	**96,357**	**97,688**

ANALYSIS

Travel patterns are changing, including a shift away from the regular daily commute. In the biggest urban centres in particular, a shift away from car commuting can also be seen. Many factors lie behind these headline trends which will also play out differently across the city regions.

However, as well as traditional factors like the state of the economy, it's becoming increasingly apparent that transformative technological and social change is also playing its part – including changing work patterns (with more part time and home working) and the home as a place for shopping and leisure.

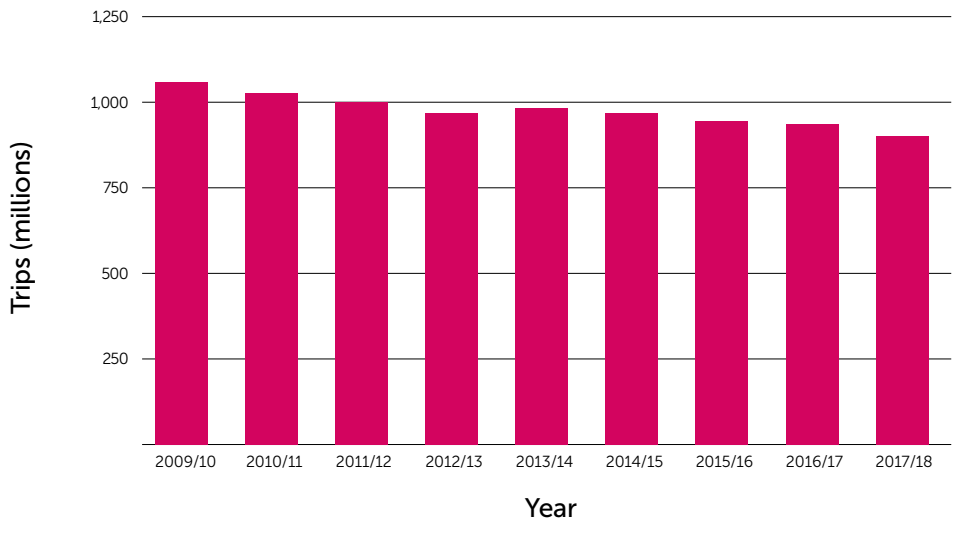
TRENDS BY MODE: THE BUS IN DECLINE

THE BUS IS THE MOST USED FORM OF PUBLIC TRANSPORT BUT THE FORM OF PUBLIC TRANSPORT IN THE BIGGEST TROUBLE AS SERVICE LEVELS AND USAGE DECLINE YEAR AFTER YEAR IN THE METROPOLITAN AREAS. BUS PROVISION AND USE IN REGULATED LONDON REMAINS FAR HIGHER THAN ELSEWHERE BUT HAS ALSO DECLINED IN THE LAST FOUR YEARS.

The bus remains the dominant mode of public transport in the Metropolitan areas. However, patronage is in long term decline having fallen by 15% from 1.1 billion in 2009/10 to 908 million in 2017/18[21].

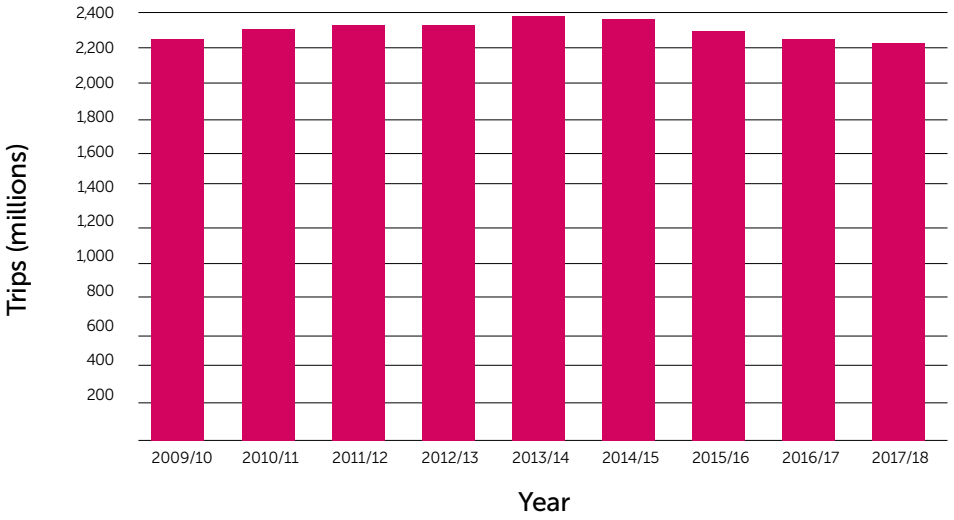
After a sustained period of growth, patronage in London has now decreased for the last four years, bringing patronage back to the same levels as in 2009/10[22]. However, bus trips per head remain far higher than in the Metropolitan areas.

BUS PATRONAGE IN THE METROPOLITAN AREAS (MILLIONS)

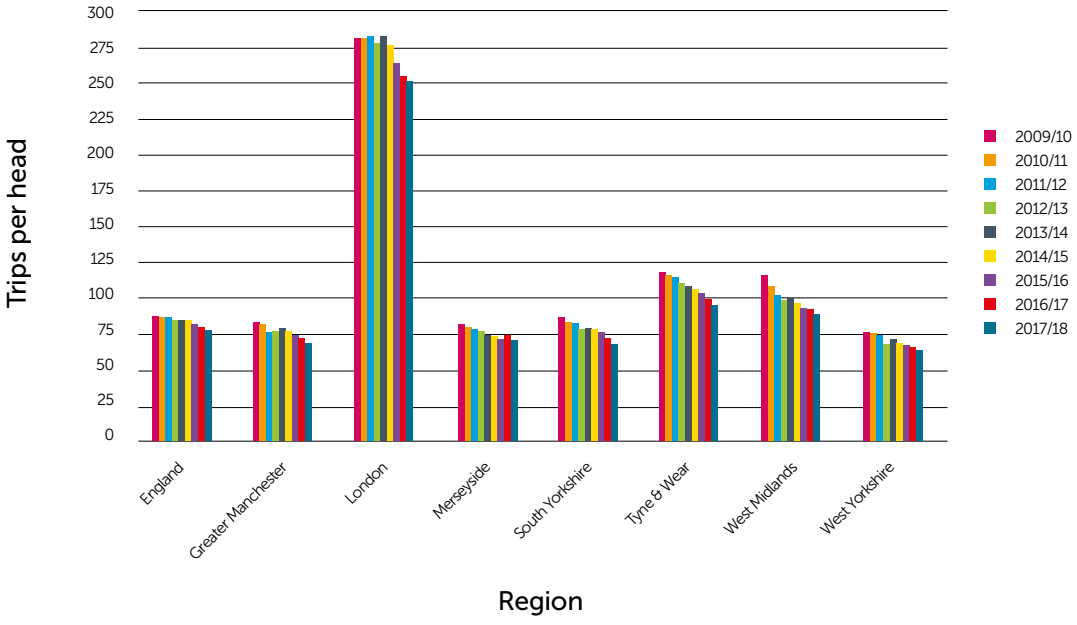


21. DfT Statistics Table BUS0109a
22. DfT Statistics Table BUS0109a

BUS PATRONAGE IN LONDON (MILLIONS)



BUS TRIPS PER HEAD OF POPULATION



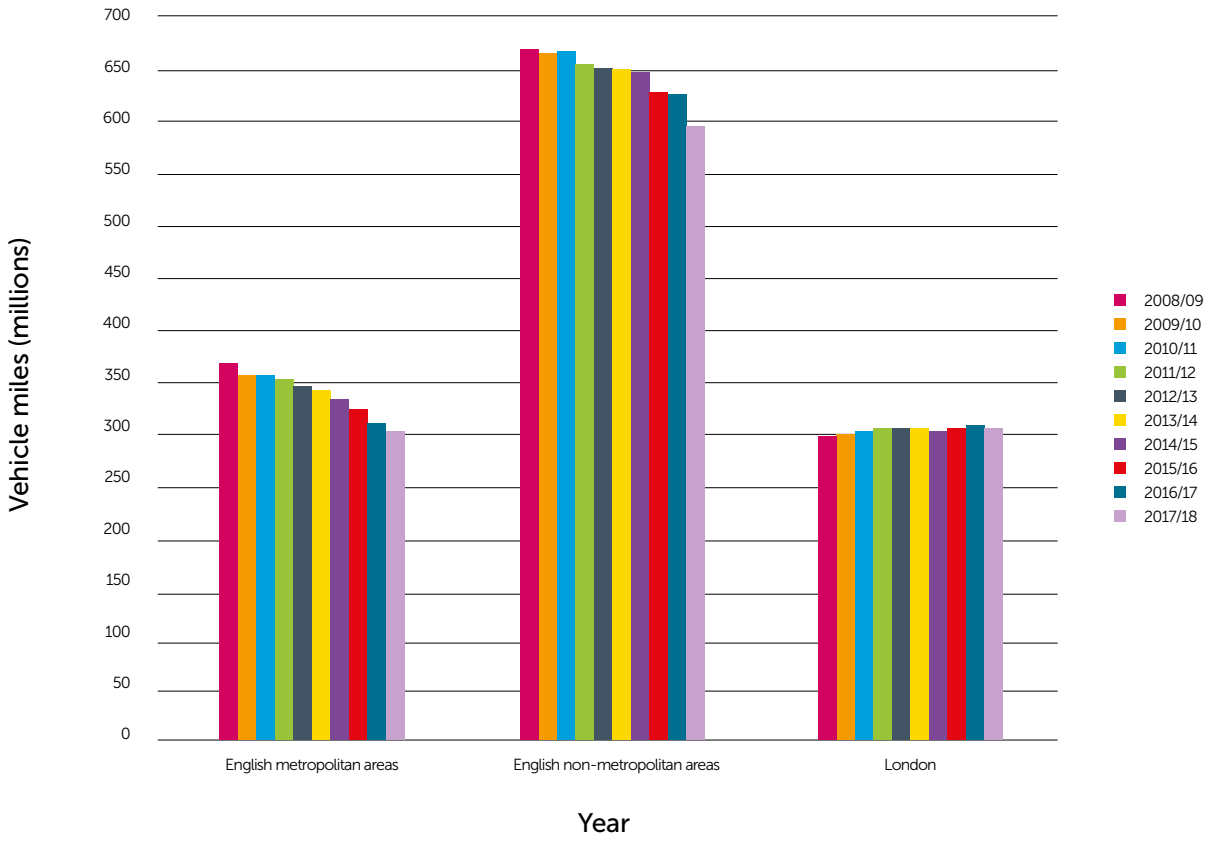
Across the city regions, the fall in bus trips per head is greater than the fall in total passenger journeys, implying that only population increase is preventing bus patronage from falling further[23]. Looking at some possible contributing factors behind patronage decline, bus vehicle miles have fallen significantly (18%) in Metropolitan areas in the last decade (as a result of cuts in bus services) whilst increasing by 2% in London[24].

The number of older and disabled concessionary trips fell by 22% in the Metropolitan areas between 2010/11 and 2017/18[25]. This is in part due to the increase in eligibility age which has reduced the number of people entitled to the concession.

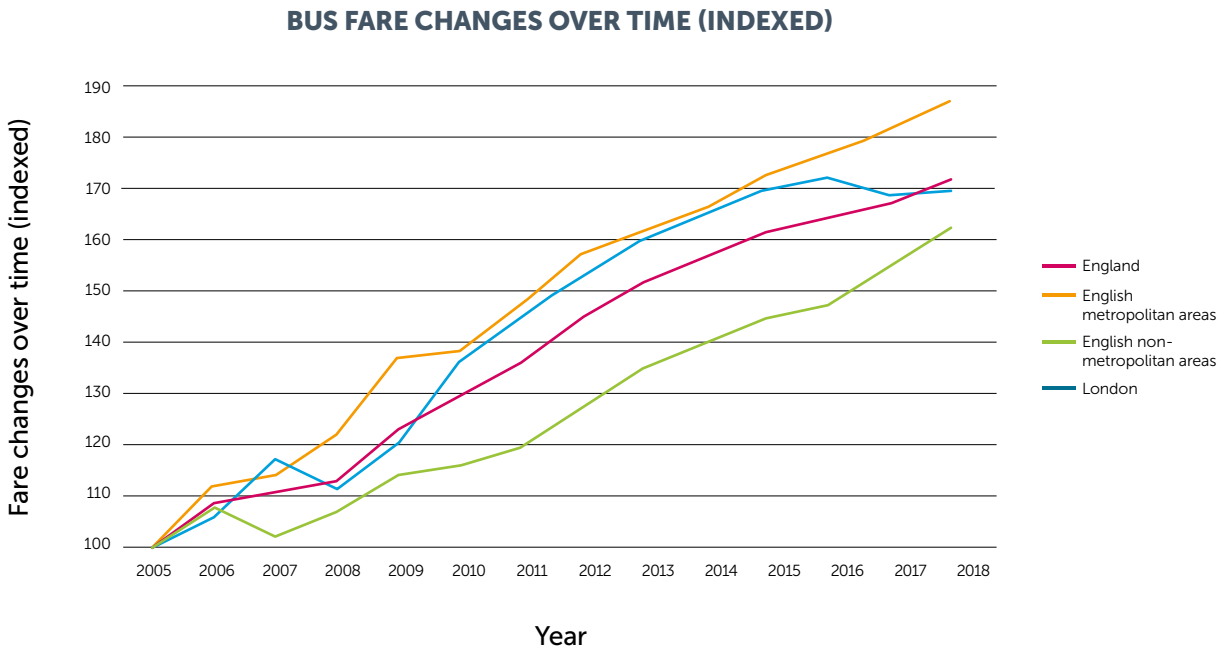
Bus fares have increased by 85% in Metropolitan areas since 2005[26]. When inflation is accounted for, this is still a real terms increase of 20% over the time period. The increase in Metropolitan areas is significantly above other areas of the country.

However, despite the gloomy national picture there are some points of light in the darkness. Recent data from the West Midlands shows a small increase in fare paying patronage (although the overall figures are suppressed by continuing decline in concessionary travel). Growth can also be seen on particular corridors and in particular areas where there has been investment in a service which has been designed to meet the needs of the local market.

BUS VEHICLE MILES BY AREA (MILLION)



23. DfT Statistics Table BUS0110a
24. DfT Statistics Table BUS0302
25. DfT Statistics Table BUS0821
26. DfT Statistics Table BUS0415



ANALYSIS

Given that the bus is the backbone of the public transport network, and the mode relied on most by those with the least, the continuing decline of bus services is a major cause for concern. The Urban Transport Group is undertaking a major research programme into the factors driving bus patronage trends including our initial report *What's driving bus patronage change? An analysis of the evidence base*[27]. Follow up research is now taking place into areas where the evidence base is weakest and to identify common factors in those areas where bus use is high or growing, or both.

Public support for bus services provides exceptional value for public money with our recent report *The cross sector benefits of backing the bus* finding that support for bus services plays a key role in achieving 29 policy objectives for 12 out of 25 departments of Whitehall[28]. We are therefore making the case for reformed and enhanced funding for bus services through a new connectivity fund which would allow for better local targeting of more public support for bus services to help turn bus networks around.

27. http://www.urbantransportgroup.org/resources/types/reports/whats-driving-bus-patronage-change-analysis-evidence-base
28. http://www.urbantransportgroup.org/resources/types/reports/cross-sector-benefits-backing-bus

RAILWAYS ON THE UP

RAIL'S INTRINSIC ADVANTAGE OF PROVIDING RAPID ACCESS TO URBAN CENTRES HAS MADE IT A RUNAWAY SUCCESS OVER THE LAST DECADE WITH SOARING PATRONAGE BARELY DENTED BY RECENT POOR SERVICE ON SOME NETWORKS. HEAVY RAIL NETWORKS ARE COMPLEMENTED BY GROWING LIGHT RAIL AND MODERN TRAM SYSTEMS, MANY OF WHICH ARE HIGHLY POPULAR WITH PASSENGERS.

Regional rail (which includes most local services in the Metropolitan areas) has been a remarkable success story with patronage hitting 389 million in 2017/18, an increase of 29% since 2008/09[29].

In the Metropolitan areas, there has been growth of 25% overall, with very strong growth in Greater Manchester (26%) and West Yorkshire (19%) since 2010/11. Growth in rail use in the West Midlands has been particularly remarkable, with an increase in rail use of 153% since 2010/11. This reflects, in part, the West Midland's rapid economic growth over the same period. The most recent figures for the Metropolitan areas in the North of England have been negatively impacted by ongoing extensive performance and industrial relations problems on Northern Rail which provides the majority of local and urban heavy rail services in these areas.

Meanwhile, across the London and South East network, there has been a 37% growth over the same period but with patronage declining in the last two years.

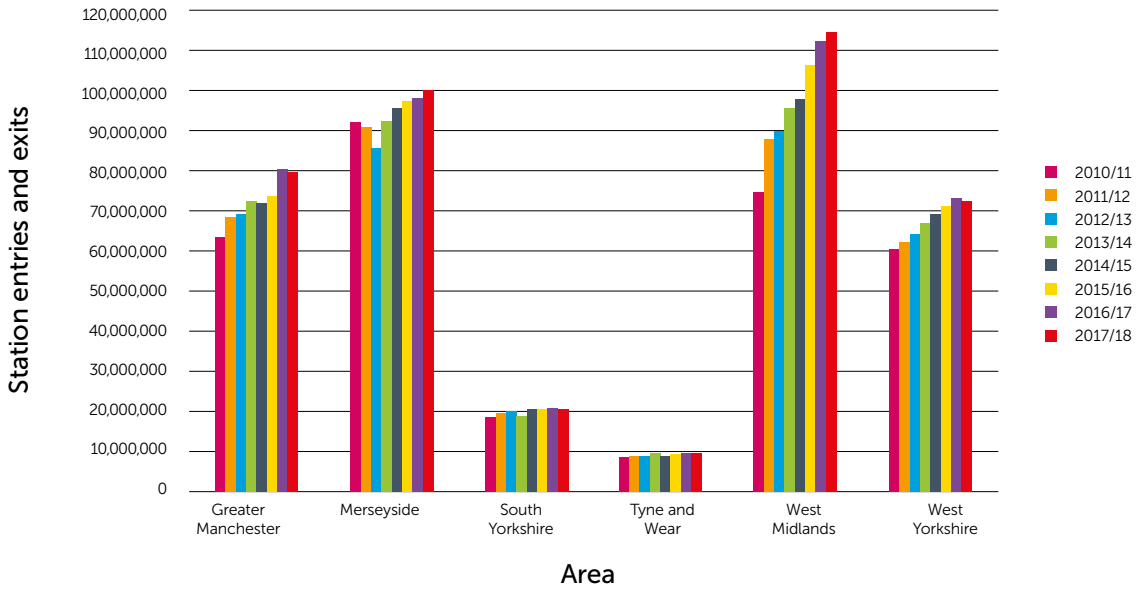
The softening in demand has been caused by a number of factors including poor performance on parts of the South East rail network.

Looking at London, there has been a fall in patronage over the last two years[30]. This ties in with a period of slower than anticipated economic growth in the capital and performance problems with a number of the major franchises into London.

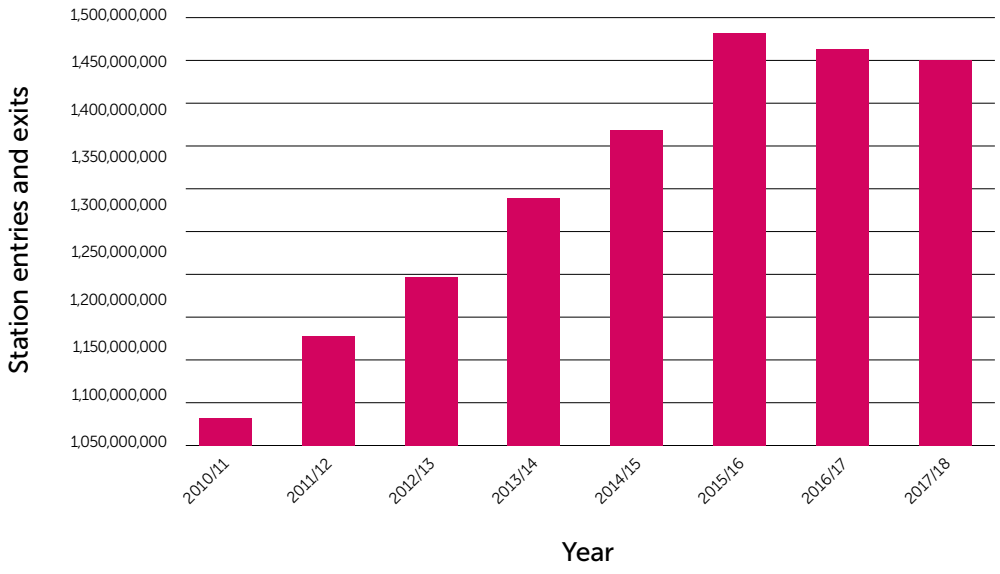
There has been a significant movement away from season tickets over recent years (reflecting changing working patterns). After decades of strong growth (with sales more than doubling between 1990 and 2014-15), season ticket sales have decreased by 11% between 2014/15 and 2017/18. During this time period, advanced fare sales have increased by 22%, anytime tickets by 15% and off peak tickets by 11%.

29. ORR Data Portal
30. London patronage calculated using ORR station entries and exits for all stations within London

NUMBER OF STATION ENTRIES AND EXITS BY AREA



NUMBER OF STATION ENTRIES AND EXITS IN LONDON

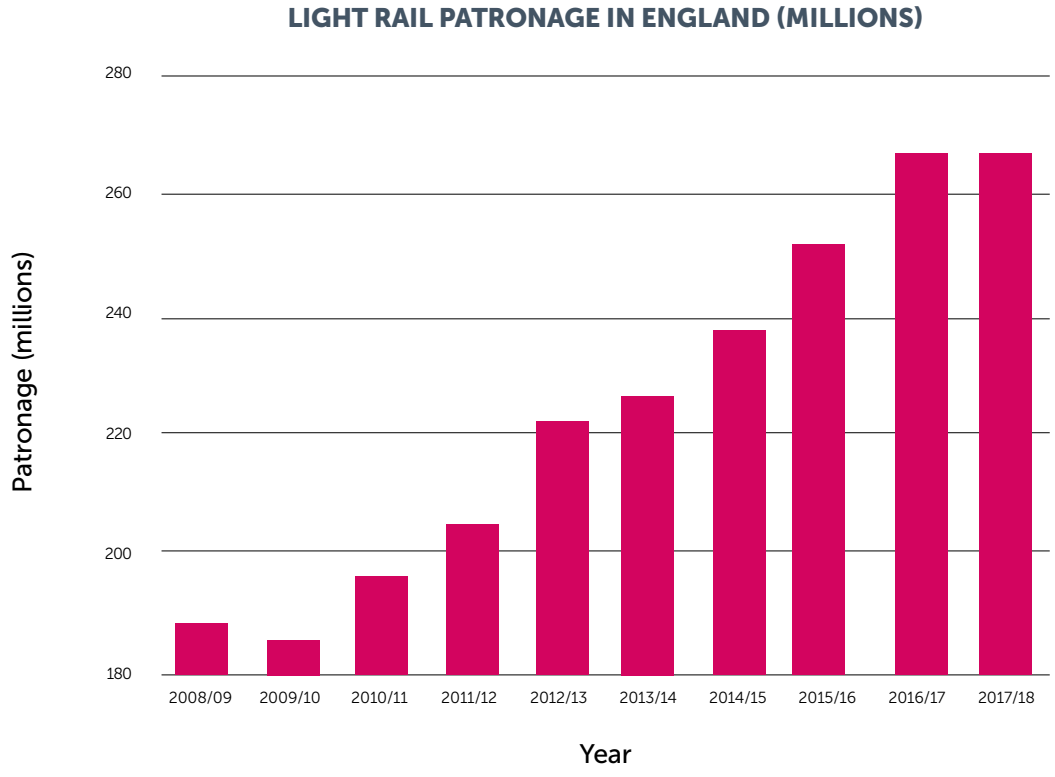


Light rail and modern trams

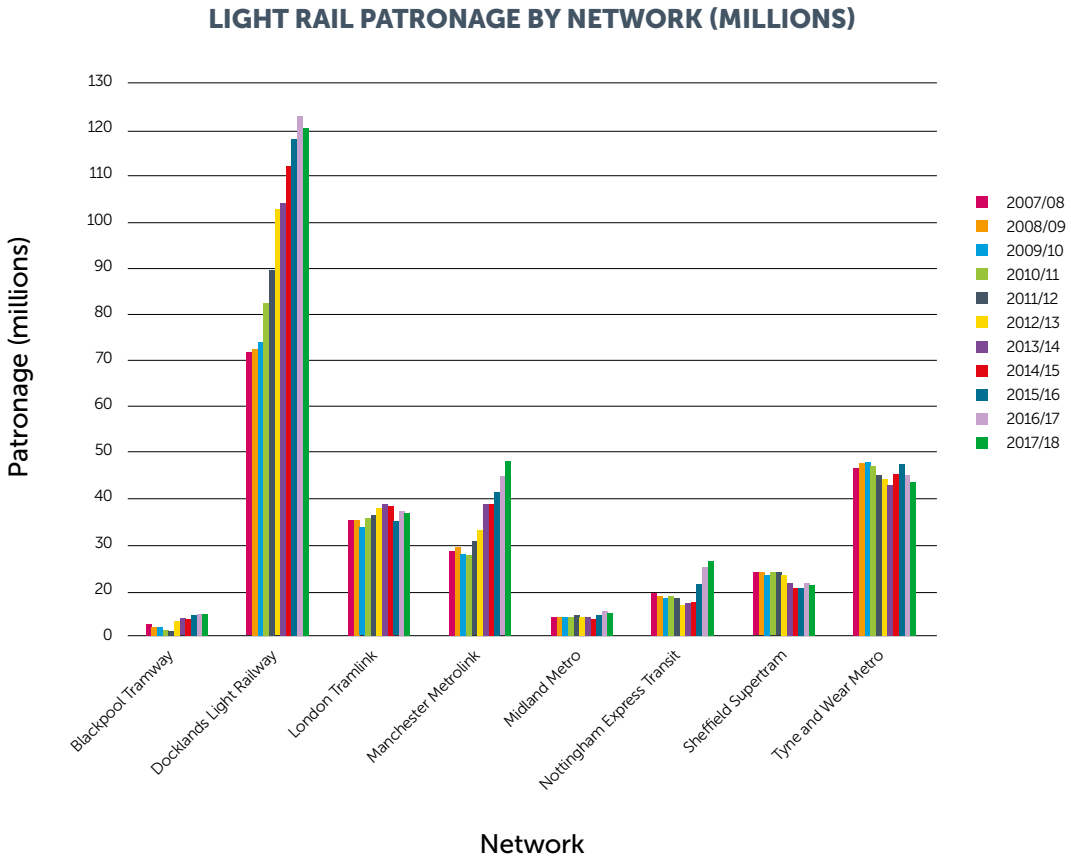
With the expansion of networks, light rail patronage has increased by 80 million trips in the last decade, a growth of 41%[31], though with a small decline last year. Although patronage has doubled on the Manchester network over the past decade and increased by 80% on the Nottingham network, overall there is a very mixed story across the UK's tram and light rail networks, with the reasons for this varying[32].

Factors behind growth and decline include new lines and better services, the state of the local economy, disruption caused by renewals and improvements, and performance problems where the system is ageing and requires renewal.

Modern tram systems remain highly popular with the public with much higher levels of satisfaction when compared with other public transport modes. The latest survey by the statutory transport watchdog Transport Focus, showed an average satisfaction rating of 91%, with the new tram-train extension to Sheffield Supertram recording a remarkable 100% passenger satisfaction score.



31. DfT Statistics Table LRT0101
32. DfT Statistics Table LRT0101



ANALYSIS

Rail use in the city regions has been growing at a remarkable rate reflecting its intrinsic advantages of speed and direct access to booming city centres. This growth has occurred despite limited investment in many city region rail networks. Where there has been investment, growth has been even more pronounced.

The Urban Transport Growth has long argued that where full devolution of funding and control over city region rail networks takes place, services improve both for passengers and the cities themselves. This can be seen on the fully devolved Merseyrail Electrics and London Overground networks. Alongside a wider Rail Devolution Network (which we initiated), the Urban Transport Group is making a strong case to the current Williams Review of the structure of the rail industry to make the case for further devolution of responsibilities to devolved authorities and administrations.

Overall, our light rail and modern transport networks are in a phase of growth and transition, playing a vital role in moving large numbers of people around our city regions. The overall pattern is one of expansion, patronage growth and popularity. However, some of these networks now require major investment (or are being affected by the engineering works that form part of committed investment) nor are all of these networks immune from local economic challenges.

In our recent report, *Rail Cities UK – Our vision for their future*[33], we set out a vision for expanding both rail and tram networks in the city regions. The report makes the case that only through expanded rail services can city centres continue to grow whilst their wider city regions meet housing need without leading to more congestion on the roads and the consequent problems of poor air quality and higher carbon emissions.

33. http://www.urbantransportgroup.org/resources/types/reports/rail-cities-uk-our-vision-their-future

ACTIVE TRAVEL – BUILD IT AND THEY WILL COME

ALTHOUGH IN GENERAL TOO MANY JOURNEYS ARE MADE BY CAR WHEN THEY ARE SHORT ENOUGH TO BE MADE ON FOOT OR BY BIKE, IN THE LARGEST URBAN CENTRES A DIFFERENT TREND IS EMERGING – THEY ARE BECOMING PLACES PREDOMINANTLY FOR PEOPLE RATHER THAN PLACES PREDOMINANTLY FOR VEHICLES. WHERE THIS INCLUDES INVESTMENT WHICH MAKES IT SIGNIFICANTLY EASIER TO WALK AND CYCLE, THEN MORE ACTIVE TRAVEL FOLLOWS.

The National Travel Survey shows that walking remains the second most prevalent form of travel nationally, with 317 trips per head per year, only behind trips made as a car or van driver (which stand at 390 trips per head)[34].

The national figures also show a recent increase in walking trips (up 19% since 2015). This partly reflects a change in methodology to correct for previous under reporting of some walking trips. Walking now accounts for 31% of all trip stages, an increase from 28% in 2008[35].

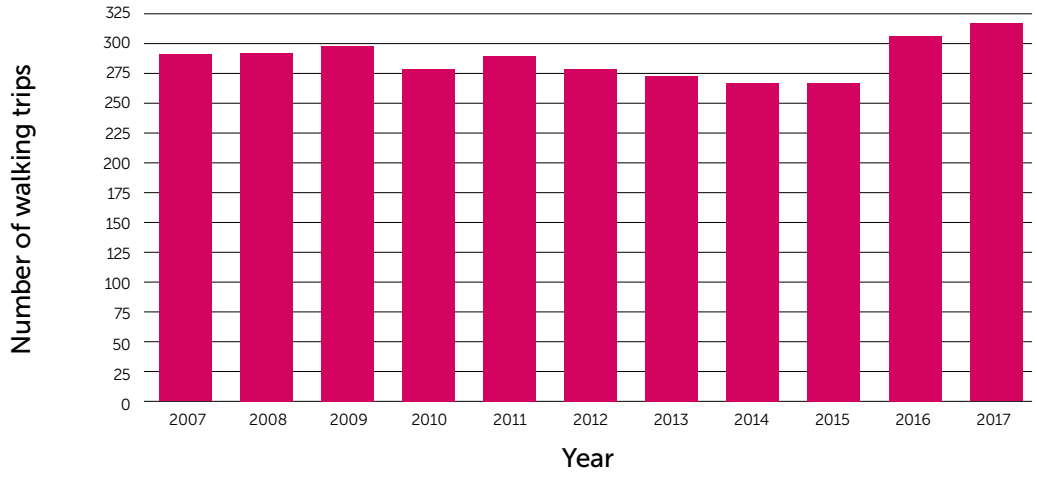
Cycle trips per head remain low and fluctuate from year to year within a narrow range of trips[36]. In 2017 the average number of trips per head nationally was 16.6. These numbers resonate with low levels of satisfaction with provision for cycling in the National Travel Survey.

Cyclists regularly show the lowest levels of satisfaction of all modes of transport, presenting a serious barrier to growing mode share. In the latest survey, only 27% of cyclists were either very or fairly satisfied with provision for cycling[37]. This is by far the lowest score of any mode.

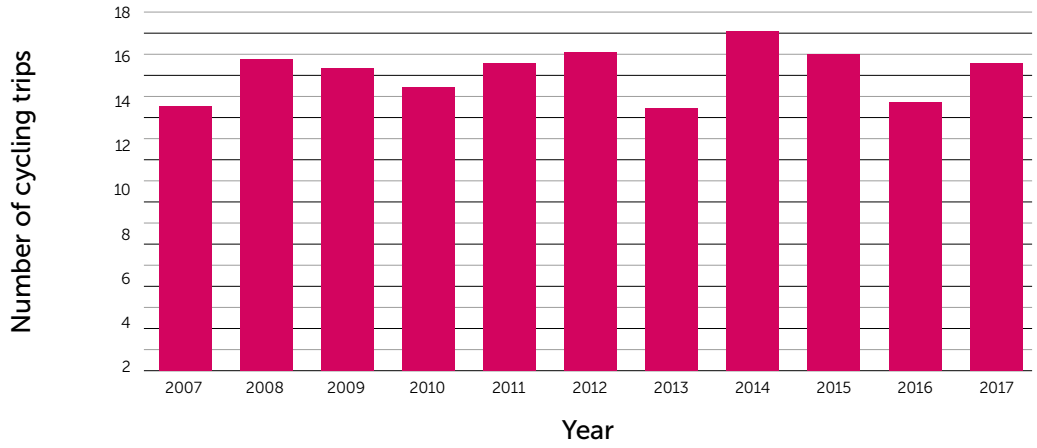
However, behind the national averages, cordon count data from major urban centres in the city regions is also picking up a big shift to the bike (although in some cases from a low base)[38]. The Greater Manchester Oxford Road scheme showed an increase of 86% in cycle trips along the Wilmslow Road section after the new infrastructure was installed. In West Yorkshire, since the opening of the Leeds Bradford cycle superhighway in June 2016, over half a million trips have been recorded across the route and 61% of surveyed users say their confidence has increased as a result of the provision, with users citing better safety and segregation from traffic as the main reasons.

34. National Travel Survey Table NTS0303
35. National Travel Survey Table NTS0303
36. National Travel Survey Table NTS0303
37. DfT, 2018, Walking and Cycling Statistics, England: 2017, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/736909/walking-and-cycling-statistics-england-2017.pdf
38. Information supplied from cordon count data

NUMBER OF WALKING TRIPS PER PERSON (NATIONALLY)



NUMBER OF CYCLING TRIPS PER PERSON (NATIONALLY)



GROWTH IN CYCLIST NUMBERS BETWEEN 2009 AND 2017

Area	Growth between 2009 and 2017
Newcastle	41%
Manchester	43%
City of London	37%
Leeds	52%

ANALYSIS

Active travel is good for public health and good for cities, as making trips on foot or by bike rather than by car makes more efficient use of available street and road space. Many of our cities were rebuilt around the car in the Sixties and Seventies, and in general the UK has been slower than northern European neighbours like Denmark, Germany and the Netherlands to reverse the excesses of this era and start making cities places for people rather than places for vehicles. Consequently, overall levels of walking and cycling can be relatively low. With 24% of trips being under one mile, there is significant scope for more of these trips to be made on foot or by bike.[39]

However, change is now in the air with evidence to show that where city regions have invested in high quality infrastructure there can be big increases in active travel. Cordon count data is also showing a general and wider increase in commuting by bike.

The Urban Transport Group has consistently made the case for more investment in walking and cycling including in our recent report *Active Travel: Solutions for changing cities*[40]. We also regularly bring together active travel leads from across our member areas to share experiences and learn from each other.

39. Department for Transport, National Travel Survey Statistics Release: England 2017, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/729521/national-travel-survey-2017.pdf
40. http://www.urbantransportgroup.org/resources/types/reports/active-travel-solutions-changing-cities

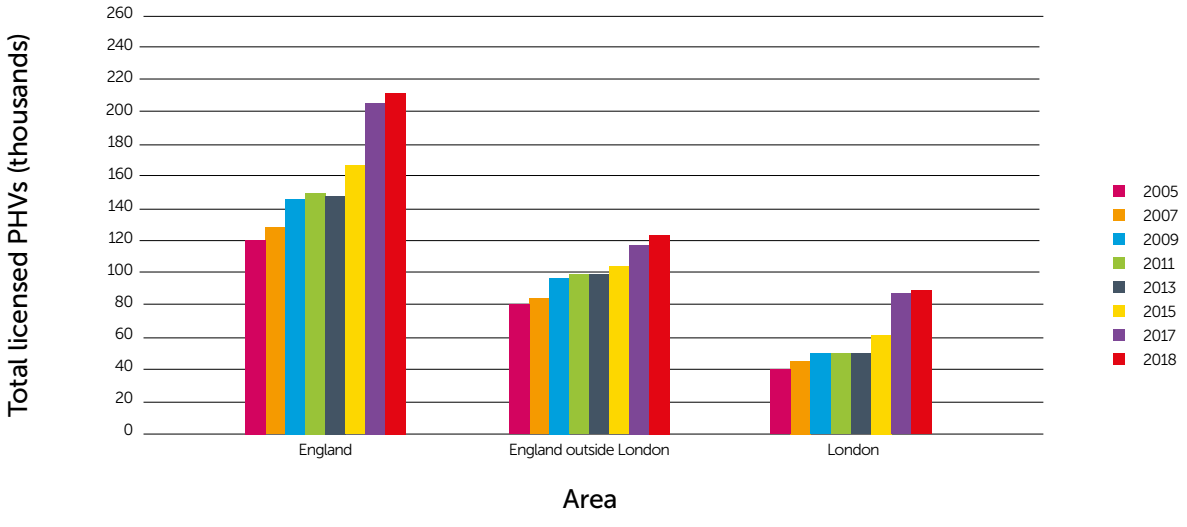
A TAXI AND PHV MARKET IN TRANSFORMATION

THERE HAS BEEN SOME SLOWING IN THE PACE OF THE EXPANSION OF PRIVATE HIRE VEHICLE NUMBERS, PARTICULARLY IN THE LAST YEAR. HOWEVER, THERE HAS STILL BEEN A REMARKABLE TRANSFORMATION OF THE SECTOR IN A SHORT PERIOD OF TIME, WHICH BRINGS WITH IT SIGNIFICANT PUBLIC POLICY CHALLENGES, FROM SAFETY TO AIR QUALITY.

The taxi and PHV sectors are being transformed by new technology and business models. The growth in these sectors has implications for a broad range of transport and wider public policy goals including the future of bus services, public safety, congestion, inclusive growth and air quality.

There has been significant growth in the number of PHVs over the past decade across the city regions[41]. This growth has slowed in the most recent year, largely due to the number of PHVs in London remaining stable for the first time in a number of years.

TOTAL LICENSED PHVs BY AREA (THOUSANDS)

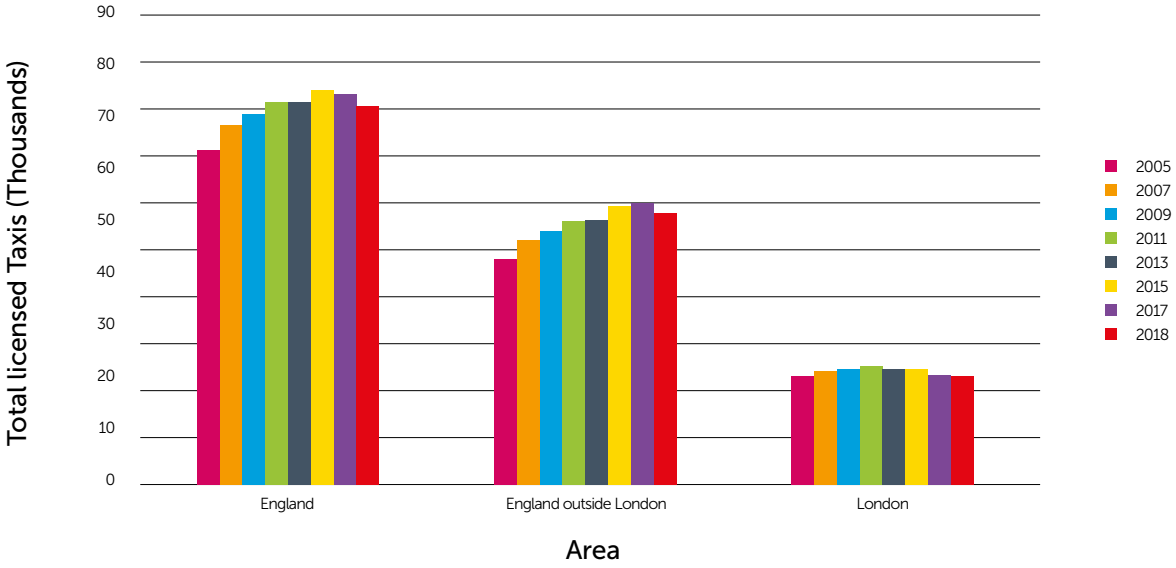


41. DfT Statistics Table TAXI0102

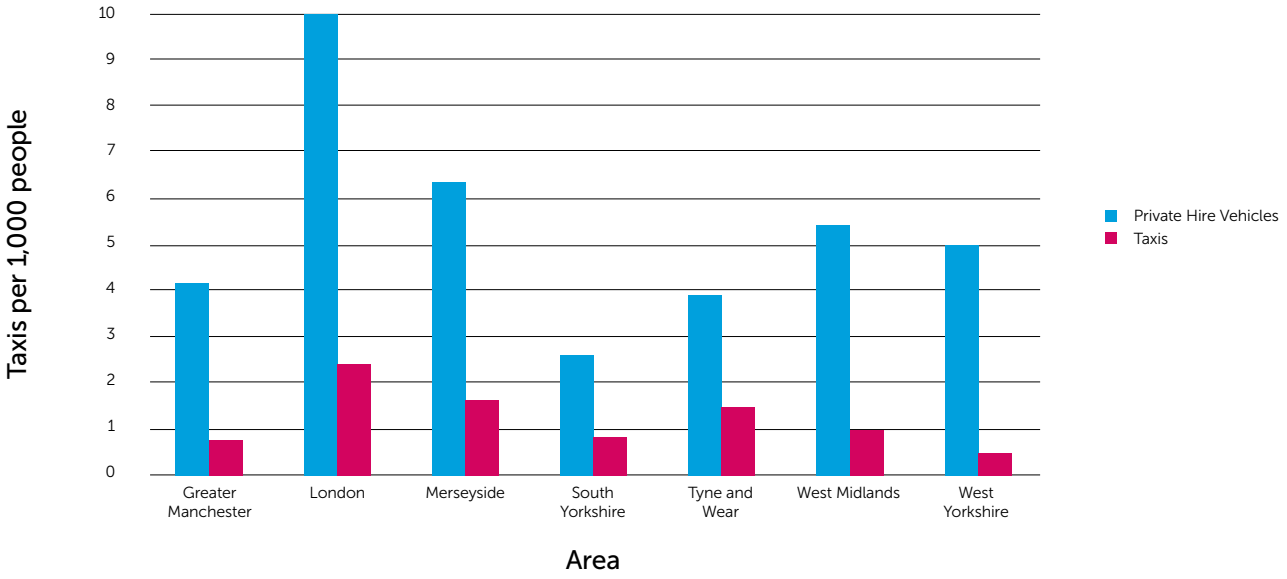
Taxi numbers have also seen growth over the last decade, although more recently numbers have been in decline[42]. There are many more PHVs per head of population in the city regions than taxis[43]. With recent growth in PHV numbers, the number of PHVs per head now ranges from 3 per 1,000 people in South Yorkshire to a remarkable 10 per 1,000 people in London.

Despite the huge growth in licensed vehicles, research in London suggests that there has been much lower growth in the number of trips. In London there has been a 79% increase in the number of taxis and PHVs since 2005, but only a 32% increase in the number of trips[44]. Whilst this is still a significant increase, it is nowhere near the scale that the increase in vehicle numbers might suggest.

TOTAL LICENSED TAXIS BY AREA (THOUSANDS)



NUMBER OF TAXIS AND PHVS PER 1,000 PEOPLE BY AREA (2018)



42. DfT Statistics Table TAXI0102
43. DfT Statistics Table TAXI0105
44. TfL, Travel in London, Report 11, http://content.tfl.gov.uk/travel-in-london-report-11.pdf

ANALYSIS

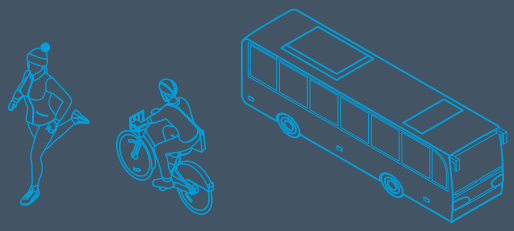
The taxi and PHV sectors have continued to evolve and change at a rapid rate over recent years with some remarkable increases in the number of PHVs in particular. Whilst the rate of change has slowed in the most recent year, the changes in the sector have significant implications for a host of public policy issues including for air quality, public safety, congestion, carbon emissions, public transport patronage and the urban realm.

The Urban Transport Group explored these issues in its recent report *Taxi! Issues and options for city region taxi and private hire vehicle policy*[45], which also made recommendations about the way in which the legal framework for the sector could be updated so that urban authorities can strike the right balance between benefits for consumers and the wider public interest.

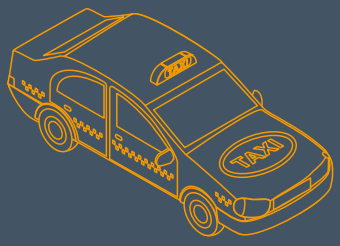
45. http://www.urbantransportgroup.org/resources/types/consultation-responses/taxi-and-private-hire-vehicle-licensing-protecting-users

CONCLUSIONS: EIGHT KEY TRENDS

Big changes are taking place in why and how often people travel – including the decline in the traditional, regular daily commute.



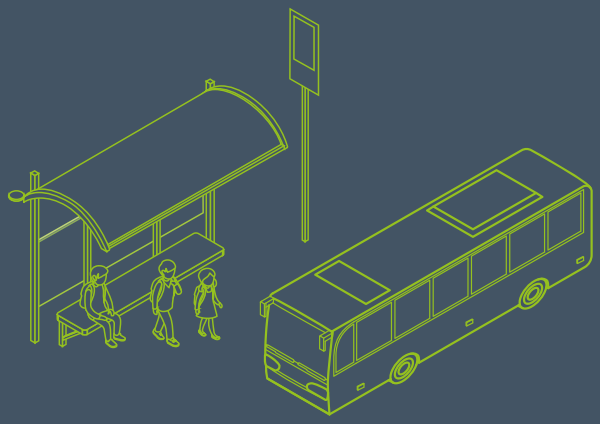
Whilst the car is still king nationally, the largest urban centres have seen a shift to public transport, walking and cycling.



There has been some slowing in the pace of the expansion of PHV numbers. However, there has still been a remarkable transformation of the sector in a short period of time, which brings significant public policy challenges, from public safety to air quality.

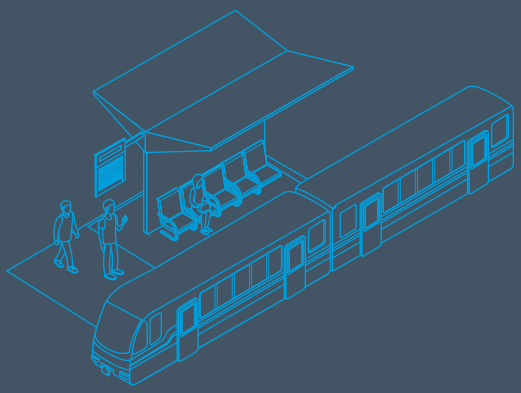
City region economies, populations and housing demand are growing and will continue to grow. Long term, adequate and stable funding for expanded transport networks is needed to meet these complex and inter-related challenges.

Many of the poorest places and communities can be found in the city regions. With the right policies, transport can play its part in opening up access to opportunity for these communities.



Bus services and bus patronage continue to decline at an alarming rate (although from a very high base and a much later starting point in London) given the bus is the backbone of city region public transport networks.

There's a shift in city centres becoming places for people rather than places for vehicles, and this is bringing with it an increase in active travel.



Although performance problems, the economy and the decline in regular commuting slowed growth on some rail networks recently, this has hardly dented a decade of extraordinary growth on city region rail networks due to rail's intrinsic ability to get large numbers of people into booming city centres quickly.

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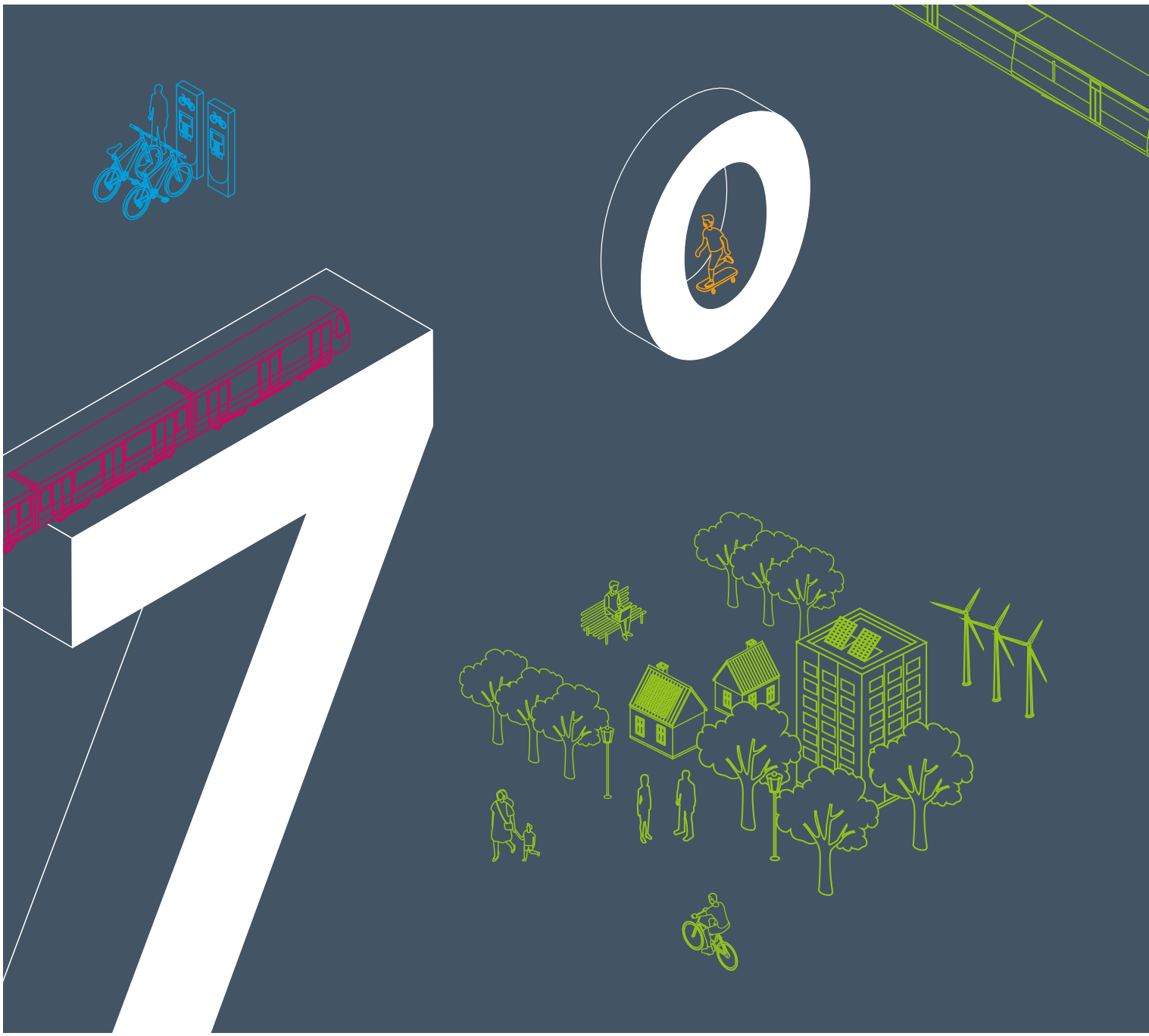

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