INSIDE TRACK

The state of transport 2025

URBAN TRANSPORT GROUP

FOREWORD

Welcome to the second instalment of our annual 'Inside track' report series, which outlines the changing landscape of transport in England over the last decade.

Whilst last year's report highlighted the precarious position of public transport in city regions, largely due to the enduring impact of the Covid-19 pandemic, I am pleased to say there are reasons to be more cheerful this year, with green shoots of growth evident across recent transport statistics.

For bus, both passenger numbers and service provision increased in England's city regions over the last year. Passengers continued to return to both heavy and light rail too. Active travel investment has delivered positive results. Shopping trips were also on the up. And there is further evidence showing how investing in transport and its infrastructure spurs development and regeneration. And all this is set against a positive backdrop of people making more trips overall – a 6% increase on last year.

But none of these statistics leads us to say 'job done'. Far from it. The fact that fewer than half of all trips (48%) are made by public transport and walking, cycling and wheeling combined (versus private transport at 52%) suggests we are a long way away from where we ought to be, especially in the context of the need to decarbonise our economy and encourage active lifestyles. Much more must be done to support people to get out of their cars and to choose public and more active travel options instead.

Yet what we are increasingly witnessing at the city region level, is that devolution is beginning to deliver on transport. Where we take decisions on transport *locally,* and invest in *local* transport, it is *local* communities which are benefiting. Whilst this edition of Inside track picks up on the successes of transport devolution in England, I recommend that this report be viewed together with our recent paper 'Delivering growth through transport devolution' to gain a fuller appreciation of all that this system of governance is achieving for England's urban areas. Government must continue to support the devolution agenda if it is to unlock the economic potential of our city regions.

Let us hope that next year's Inside track delivers even more positive statistics to further support the case for transport as a powerful enabler of economic growth and social cohesion.

Jason Prince, Director, Urban Transport Group

CONTENTS

March 2025
Author: Dr Tom Ellerton

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

About the author
Dr Tom Ellerton is Technical Manager at the Urban Transport Group, leading on the organisation's data and analytical work. Tom has a PhD in urban regeneration.

IN FOCUS: THE LAST YEAR

Since our last Inside track report, published in March 2024, transport trends have evolved, with some positive shoots of optimism appearing within our English city region travel patterns and economic performance.

Delivering better public transport networks will be central to achieving the Government's missions and milestones set out in its Plan for Change[1]. However, it will be particularly important in achieving the central mission of kickstarting economic growth.

Where we are providing city regions with the powers and funding to deliver on their transport priorities, we are starting to see results. With the right investment, local transport will play a major role in achieving the milestones the Government has set itself.

This section summarises some of the key trends from the last year.

Overall trip numbers continue to grow

The number of trips that we make each year is still growing, with a 6% increase in trips taking us to 915 trips per person[2]. However, this growth rate is less than half the 14% growth seen in the previous year, suggesting that trips numbers are starting to flatten out.

The come back to the commute stalls

The average person made fewer commuting trips in the last year, ending a trend of growth following the pandemic. Trips fell marginally on the previous year (117 trips in 2023 compared to 119 trips in 2022) and are still 31 trips per person down on the start of the decade[3]. Rail season ticket revenue is still 66% below pre-pandemic levels[4], despite rail patronage recovering strongly overall, reflecting changes to working patterns post-Covid 19.

But shopping trips show strong growth

There was strong growth for shopping trips, with the average person making 169 trips a year, up 18 on the previous year[5]. This corresponds with high street footfall increasing by 3% in the year but still down 11.5% on pre-pandemic levels.[6]

Positive roots of growth for the bus

Bus patronage and vehicle kilometres grew over the last year in the city regions, with post-pandemic growth continuing. Some city regions have seen particularly strong patronage growth with Greater Manchester (12%) and West Yorkshire (12%), growing at almost double the national rate (7%)[7].

There has also been an increase in service provision, with the city regions on average seeing bus kilometres increase by 3% in the last year. Whilst provision is still almost 14% beneath pre-pandemic levels, this is a step in the right direction.[8]

Strong signals for heavy and light rail

Rail patronage continued its strong post-pandemic growth, with trips growing 16% in 2023/24 compared to the previous year[9]. This growth has been largely driven by leisure and business trips. If this trend continues, rail patronage could surpass pre-pandemic levels in the next year.

Light rail patronage grew by 8% in the last year, a trend which will likely see a number of networks hit record levels of patronage within the next year[10].

Where we invest in active travel schemes, users continue to come

Although national cycling levels have remained largely static over the last ten years, where we have invested in infrastructure we are seeing positive trends. London is reporting that cycling levels grew 5% in 2024 and are now 26% above pre-pandemic levels[11]. Similarly, key routes in Greater Manchester have seen their busiest days ever in the last year, with October seeing up to 7,000 cyclists using the Oxford Road cycleway, compared to a monthly high of under 6,000 in 2019[12].

Increases in car trips and distance driven on our roads

The number of trips people make by private car increased 9% in the last year nationally, with the distance travelled in a private car increasing by 2% across the city regions[13]. Although the number of miles driven is still below pre-pandemic levels, if this growth continues, those levels will soon be surpassed.

Green shoots for city region economies

In the most recent year available (2022), the North East (9.5%), Greater Manchester (9.4%), and London (9.8%) all grew at a faster rate per head of population than the UK average (8.8%)[14].

This is a positive sign that we are beginning to unlock the economic potential of our city regions. Transport investment and further devolution are among the keys required to unlock further growth.

INTRODUCTION

Over the past ten years the overall public transport trends look familiar – a challenging situation for bus with a reduction in patronage and service miles, whilst light rail and rail have performed reasonably well. However, this high-level trend hides the significant disruption that has occurred along the way, in the form of Covid-19 and the cost-of-living crisis. In the last decade we have witnessed some of the largest peacetime changes to society and the economy ever seen.

This has affected the number of trips we make, why and when we travel, and where we travel to. People are still making fewer trips than they were ten years ago or in 2019/20, the last year before Covid-19. There is no single factor that has caused this, rather a reduction in commuting, more online shopping, and a reduction in disposable income, have all reduced the need or ability to travel, and contributed to lower mobility levels.

However, there are some positive signs in the most recent year that public transport patronage and provision is growing. These trends are happening at a time when our city regions are starting to take up the powers provided to them through devolution and gain greater control over core transport funding. Whilst the English devolution journey is still in its early stages, it is increasingly delivering positive outcomes.

Added to this, there was a change of government in July 2024, with the Labour party returning to office guided by a clear set of missions. With the right investment and powers, local transport will play a major role in achieving the missions the Government has set for itself.

The statistics and trends provided in this report cover the period leading up to the new Government entering office, providing a benchmark of their starting point and allowing us to track any changes in the trends as we go forwards and policy changes begin to take effect.

In this report, we look at travel trends and the local economies of our city regions, before exploring how devolution is beginning to deliver for the city regions. We then explore how travel trends have changed over time before looking at how this has played out across the different modes of transport.

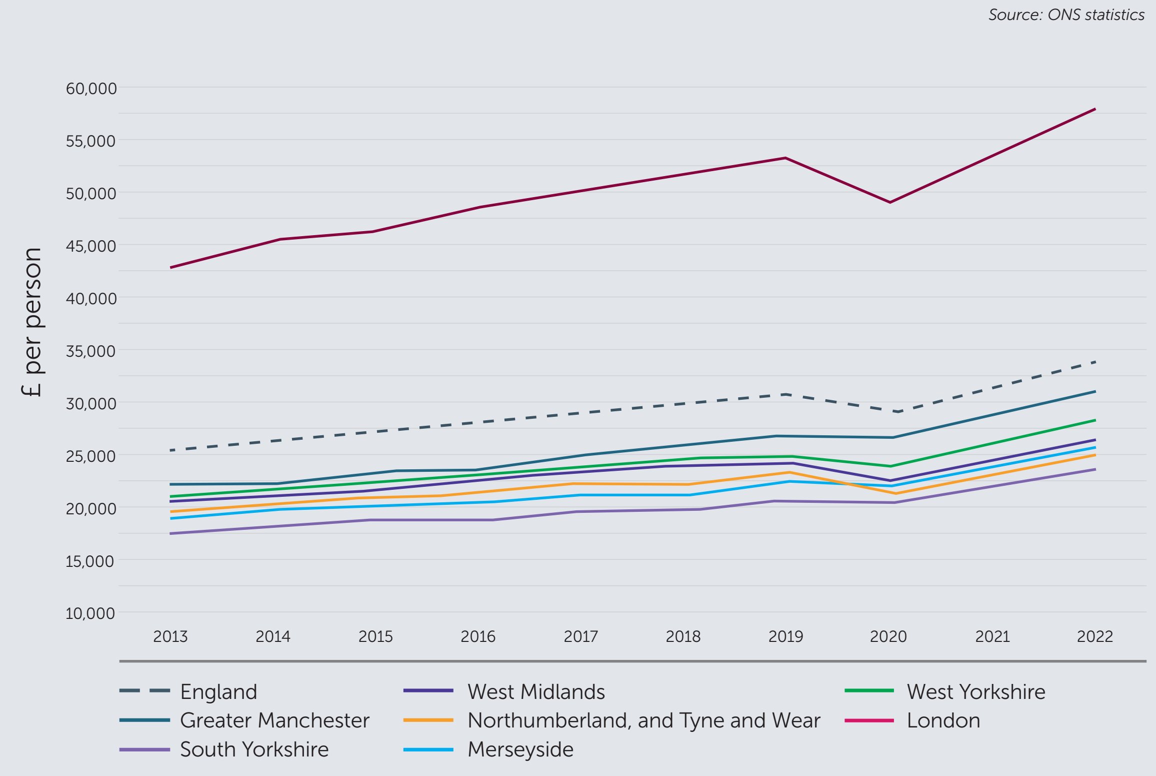
Although the Urban Transport Group has Members in the devolved nations of Scotland, Wales and Northern Ireland, as well as other smaller urban areas in England, this report focuses on transport trends in the largest English city regions (our Principal Members) given their economic and population status, the ability to compare data across areas, and the availability (or unavailability) of data for smaller urban areas. Although the new East Midlands Combined County Authority is a Principal Member, they are not represented in the report due to the lack of data currently available at this geography.

TRANSPORT AND OUR CITY REGION ECONOMIES

The central mission for the Government is to kickstart economic growth. City regions will be critical to succeeding with this mission, representing some of the largest economic concentrations in the country.

Looking at the economy of England and the main city regions, London is a clear outlier. With Gross Value Added (GVA, an indicator of productivity) per person approaching £60,000, London has an economy which is twice as productive per head of population as all the other city regions except Greater Manchester[15]. None of the other city regions outperform the England average, highlighting the untapped economic potential in these areas.

GVA per head of population by area (£)



London accounts for around 13% of the national population and 23% of the total economic output of England[16]. If the GVA gap between London and the other city regions can be closed, there is a major economic prize to be won.

In their Local Growth Plan, the West Yorkshire Combined Authority has identified an £11bn output gap in its regional economy[17]. This is the amount of additional GVA that would be generated if the region could match UK output per head of population.

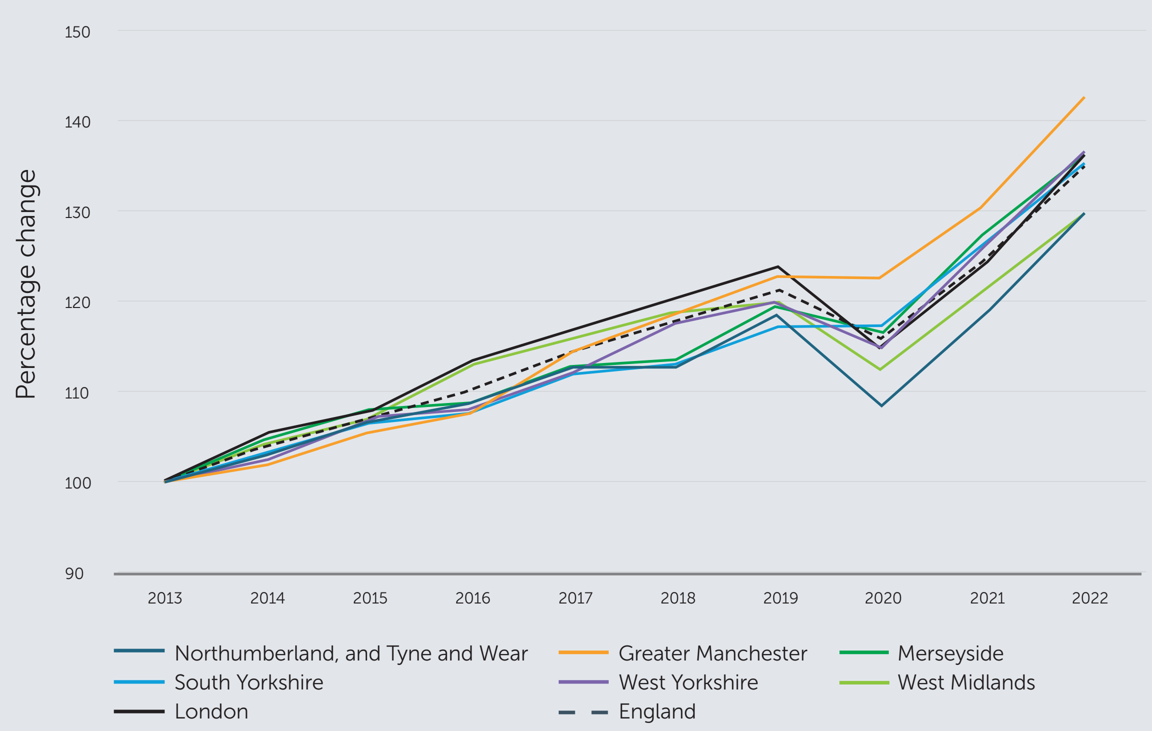
Improving the transport network to encourage new businesses to locate in the region, and to connect people with these opportunities will be vital in reducing this gap.

If we look at percentage change in growth rates per head of population over the past decade, we can see a more positive picture in the city regions, which are starting to grow at a similar rate to, or outstrip, the national average[18]. With more than a 40% growth in GVA over 10 years, Greater Manchester leads the way. Merseyside (36%), West Yorkshire (36%), London (36%) and South Yorkshire (35%) are all above or at the England average growth rate of 35%.

Whilst this trend is positive, the significant economic gap between the city regions and the England average will not be closed quickly.

Change in GVA per head of population over the last ten years

Source: ONS statistics

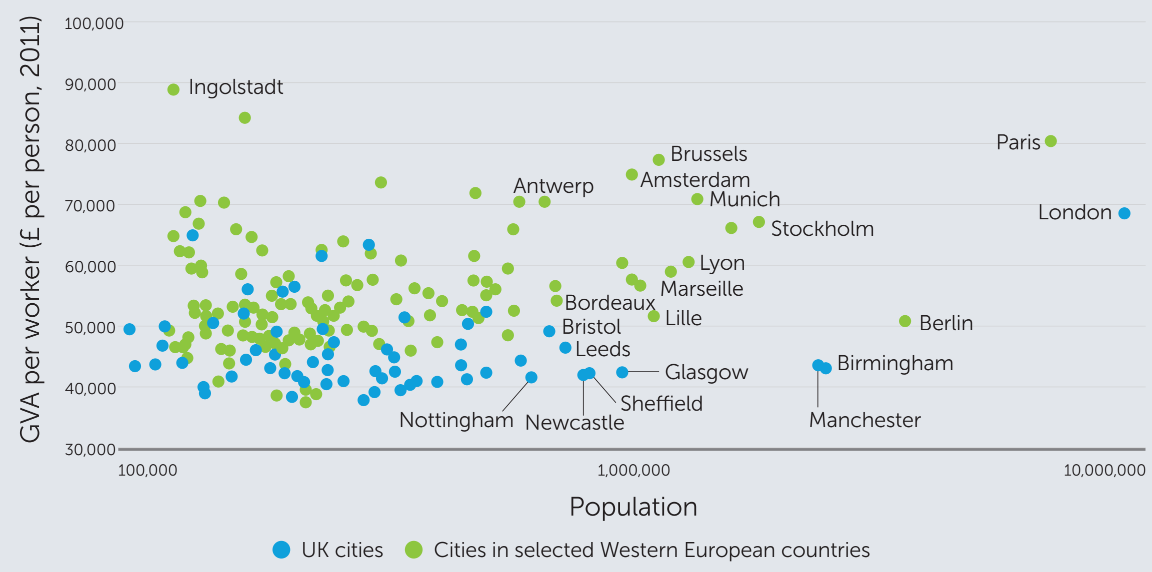


If we are to address the economic imbalance of our city regions, our transport networks must enable dense concentrations of highly productive jobs to develop and grow, ensuring that workers can access them in a timely and efficient manner. Currently, peak time congestion is worse in the UK than in any other European country[19], preventing these agglomeration benefits from developing.

Looking at the GVA per person in major cities in Europe, it is apparent that in general the level of GVA per head increases with city size. However, this does not happen with English cities, which all see low levels of GVA compared to similar European examples[20].

The impact of population on the GVA per worker in Western Europe

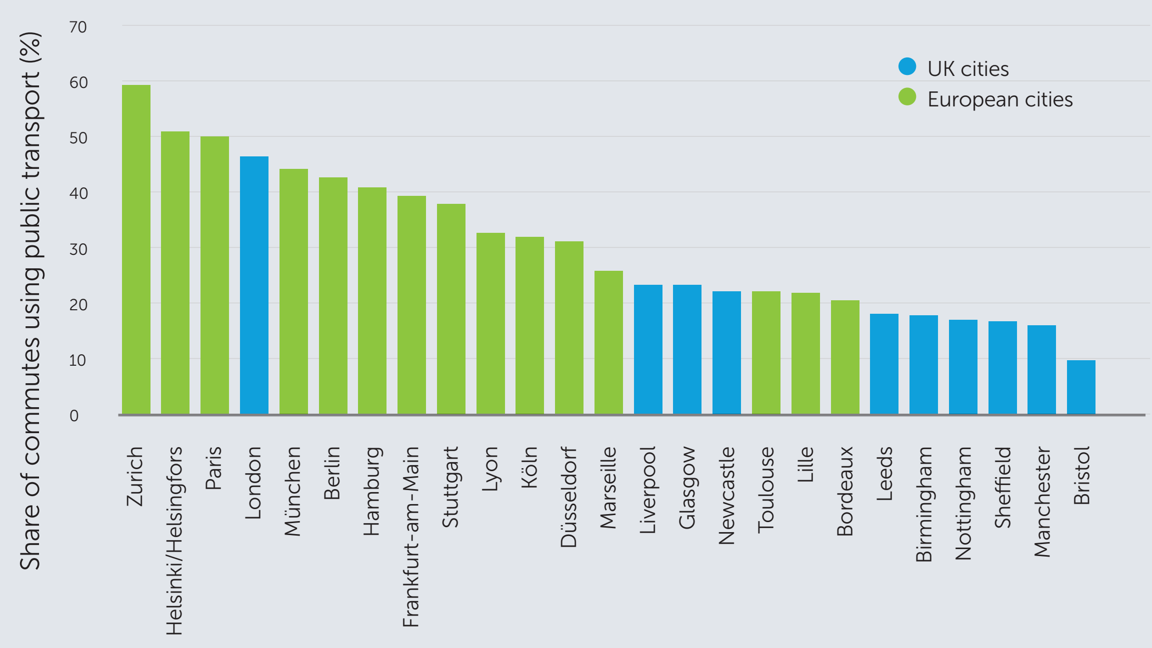
Source: Centre for Cities - Gear Shift)



Looking at the number of people commuting into major cities using public transport, London is the only English example to compare well against major cities in Europe. All other English cities sit towards the bottom of the chart.

The share of commuters using public transport into major European cities

Source: Census (2011), Eurostat Transport Cities and Greater Cities (2023)



The lack of public transport usage is likely driving the high levels of congestion and corresponding lack of agglomeration benefits that are holding back our city region economies.

Research in Birmingham, for example, has found that 1.7 million people are theoretically within a 30 minute bus journey of the city centre. However, at peak times, the real journey time of the bus reduces this to just 0.9 million people, effectively halving the population of the city[21]. This lack of connectivity means that fewer people can access jobs and opportunities, contributing to the productivity gap.

Centre for Cities estimates that poor public transport accessibility in Birmingham reduces the GVA of each worker by £3,628 per annum[22]. If this is replicated across other major cities, improving transport accessibility could present a major economic boost.

Birmingham is not alone. Research by Centre for Cities[23] has found that just 40% of residents surrounding Britain's largest cities are able to travel into city centres using public transport in 30 minutes. This compares to almost 70% of residents surrounding similar-sized European cities. It estimates that this lack of connectivity costs the UK economy more than £23.1bn per year.

Even where world class infrastructure exists in London, it is still true that investment in infrastructure can deliver impressive returns. For example, some 60% of employment growth within Greater London during the Elizabeth line build was within 1km of an Elizabeth line station[24]. It has also had a direct impact on the development and delivery of 55,000 new homes[25]. Residential housing stock growth from 2015 to 2024 has been significantly higher in areas within 1km of the line, compared to London averages.

Public transport will be central to unlocking economic growth within our city regions and driving the national economy forwards. We must ensure that our city regions have the relevant powers and control over funding streams to coordinate and develop their transport networks as well as maximise synergies with other local plans and priorities, including for housing and employment.

The role of devolution in unlocking our transport networks

In a bid to create integrated London-style transport networks, city regions are using the policy and funding levers that have been devolved from Whitehall over the last decade. The English devolution journey has been primarily powered and underpinned by transport, with the impact of the change starting to become apparent.

Since the first devolution deal (outside of London) was agreed in Greater Manchester in 2014, there are now 12 places with directly elected Mayors, with two more areas due to hold their mayoral elections in 2025 and six further expected to have mayors in 2026. Over half of England's population and economic output, is now covered by devolution deals.

Mapping English devolution

12

12 places with directly elected Mayors

61%

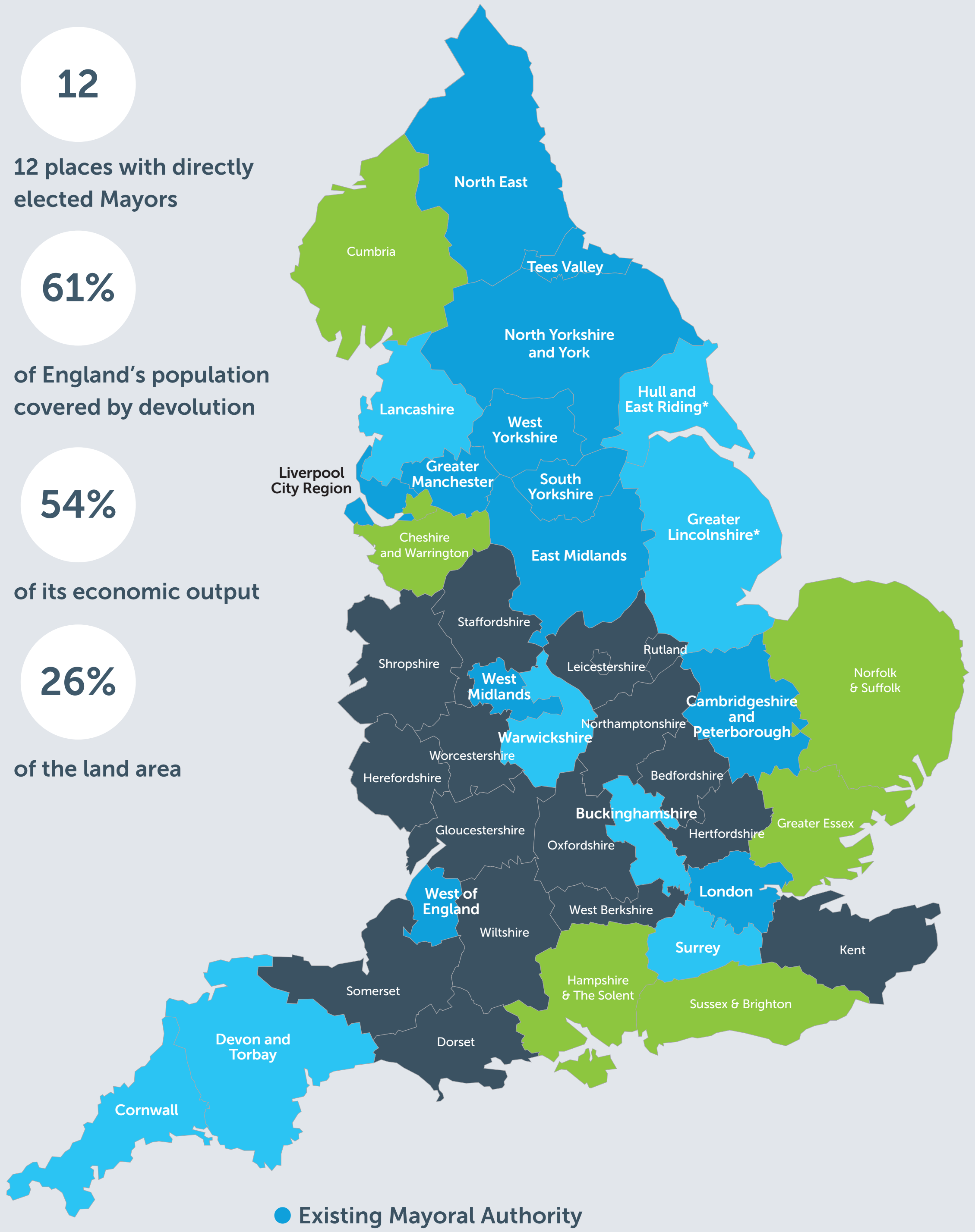
of England's population covered by devolution

54%

of its economic output

26%

of the land area



- Existing Mayoral Authority
- Devolution agreement in place
- Remaining areas
- Joined the government's Devolution Priority Programme

* Due to hold Mayoral elections in May 2025

Whilst it is too early in the journey of English devolution outside of London to quantify the long-term impact, city regions across the country are starting to take advantage of the devolved powers and funding to deliver for their communities and their economies.

Greater Manchester is the most obvious example of devolution making a difference, with the development and expansion of the Bee Network. The network is set to deliver a joined-up London-style transport system through lower fares; integrated and simplified ticketing; expansion of active travel, bus and Metrolink tram routes; as well as ambitions to integrate local rail.

The first major step towards this was the decision to fully franchise the bus network in Greater Manchester between September 2023 and January 2025. Bus franchising enables the local authority to plan the network and, among other things, set fares, routes, frequencies and vehicle standards for bus services. Private companies then compete to operate the services to the specifications set by the local authority. This enables the transport authority to play a much more proactive role in the bus network.

The first franchised area is already starting to deliver positive outcomes, with passenger revenues exceeding targets, and overall punctuality improving by 14% compared to the same period in 2023.

Most major city regions are now on the journey towards bus franchising, taking advantage of the powers available to them. Liverpool City Region Combined Authority and West Yorkshire Combined Authority will go live with their first franchised services in 2026, followed by South Yorkshire in 2027. The West Midlands and the North East are at earlier stages in their bus reform journeys.

Devolved powers and funding are also making a difference elsewhere.

- In South Yorkshire, the Supertram came back under public control in 2024, with the South Yorkshire Mayoral Combined Authority delivering significant investment into the network. In the first six months of public control, patronage increased by 4.5% and fare evasion fell from over 8% to under 1%.
- In the West Midlands, early analysis of the City Region Sustainable Travel Settlement (CRSTS – a long term devolved fund) suggests that the investment could deliver an 11-25% improvement to residents' access to employment by public transport over the next 15 years. Considering that poor public transport accessibility is costing the Birmingham economy over £3,000 per person per year, this would represent a major boost.
- In London, investment in the Elizabeth line has helped to boost regeneration, housing supply and the economy of the areas served by the new line. Since opening in 2022, the Elizabeth line has had a direct impact on the development and delivery of 55,000 new homes, including in Abbey Wood, one of the largest regeneration areas in London[26].

Devolution of powers and funds can combat the 'one-size fits all' approach which has constrained local growth and held back local transport networks. Devolution can - and must - play a role in enabling them to deliver growth. This is a journey that we will continue to track as it progresses, enabling us to understand the impact of devolution on future transport trends.

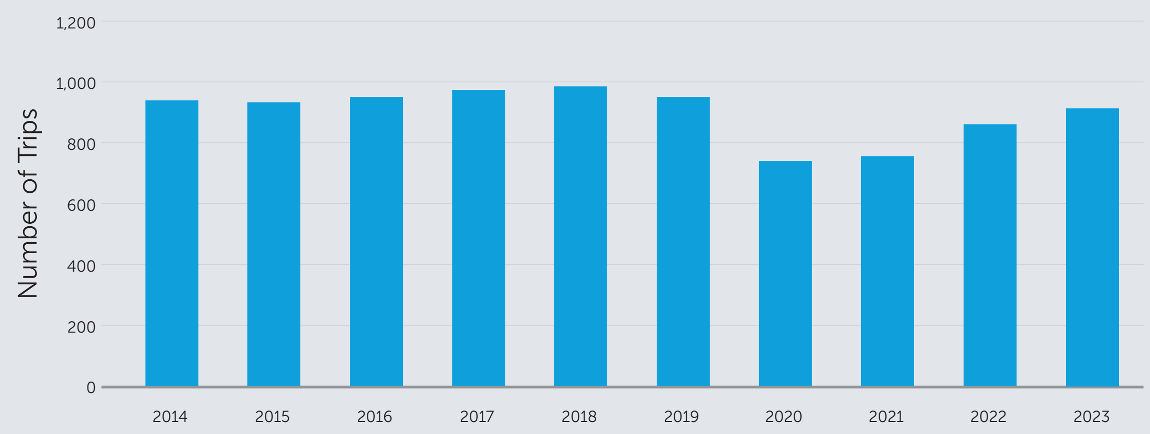
The next part of the report will now turn to explore what has happened over the past decade in transport, focusing on the ten year trends as well as the period post Covid-19.

CHANGING TRAVEL PATTERNS

The average number of trips we make had been increasing each year until 2019, which saw a slight reduction followed by a dramatic drop due to Covid-19. There has since been an increase in trip numbers each year, with the most recent year seeing a 6% growth. However, this growth rate is slowing, with the 6% growth in 2023 being less than half the 14% seen in 2022[27]. Trip rates have still not recovered to pre-pandemic levels.

The average number of trips taken per person each year (all modes)

Source: National Travel Survey 2023



Focusing on why people travel, commuting, education and shopping are the main trip generators[28]. However, trips for both commuting and shopping have declined over the past ten years, with a significant reduction since 2019.

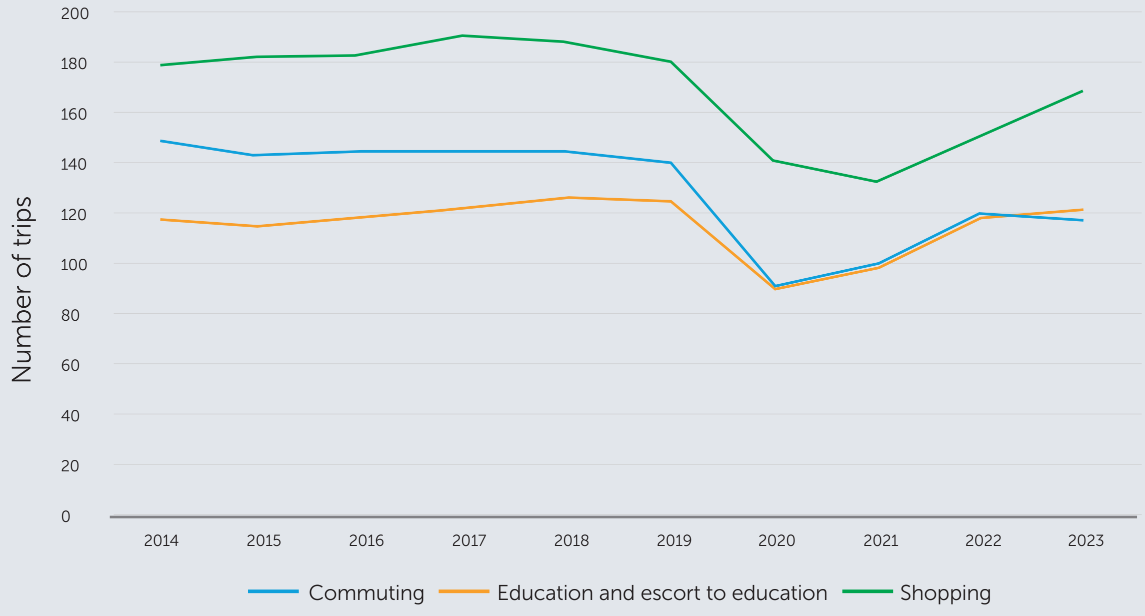
Commuting trips dropped in the most recent year, stalling the post-pandemic growth. The average person made 31 fewer commuting trips in 2023 than a decade ago.

Prior to 2020, shopping trips had been increasing each year, but the Covid-19 pandemic accelerated the movement towards online shopping, further reducing the need to travel to physical retail destinations. Although footfall at UK retail destinations grew by 3.3% in 2023, it is still 11.5% down on pre-pandemic levels[29].

Whilst trips to places of education dipped significantly during the Covid-19 pandemic, they have otherwise remained relatively stable over the decade and have largely recovered to pre-pandemic levels.

The average number of trips made by key trip purposes each year

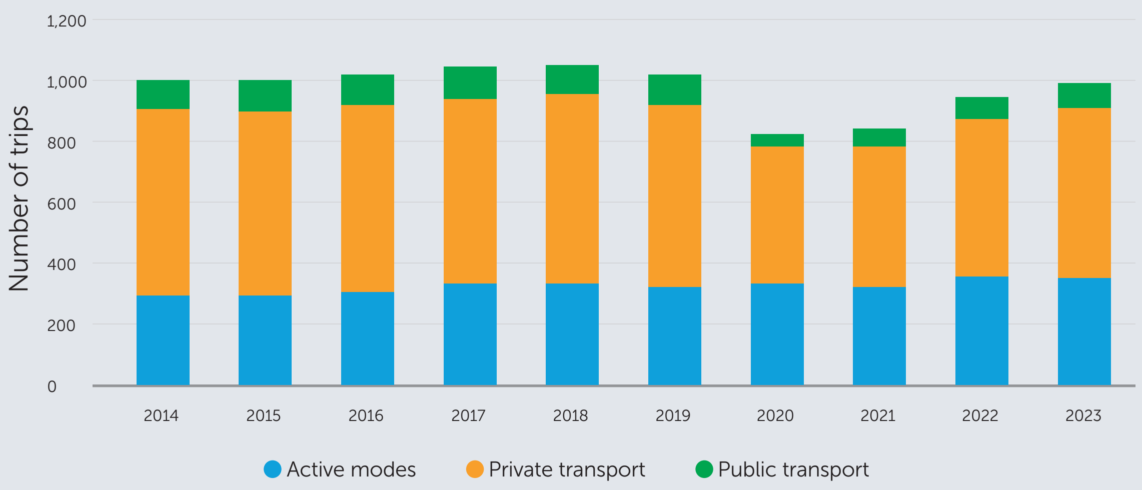
Source: National Travel Survey 2023



The change in travel patterns has seen a reduction in the number of trips made by public transport and private transport (car or van driver or passenger), with only active travel modes (walking, cycling or wheeling) seeing growth. Compared to a decade ago, people now make 53 additional trips a year by active modes, 42 fewer trips a year by private modes, and 24 fewer trips a year by public modes[30].

The number of trips an average person makes by private, public and active modes

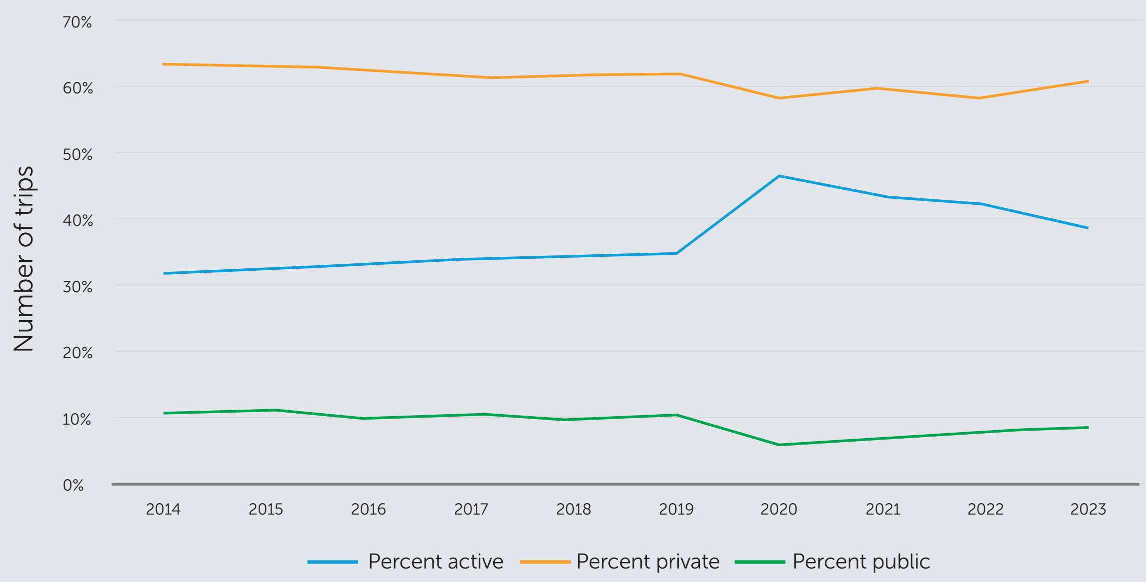
Source: National Travel Survey 2023



This has seen the active travel mode share increase from 32% of all trips to 39% over the last ten years[31]. The figure spiked during 2020 and 2021 as result of lockdowns, reaching almost 50% of all trips as people spent more time in their local areas and were advised not to use public transport. However, there has been a steady reduction in active travel mode share since this time. Public transport sits at 9% of all trips, down from 11% a decade ago.

Percentage of trips made by private, public and active modes

Source: National Travel Survey 2023



When combined, the public transport and active travel mode share has increased from 43% to 48% over the past decade.

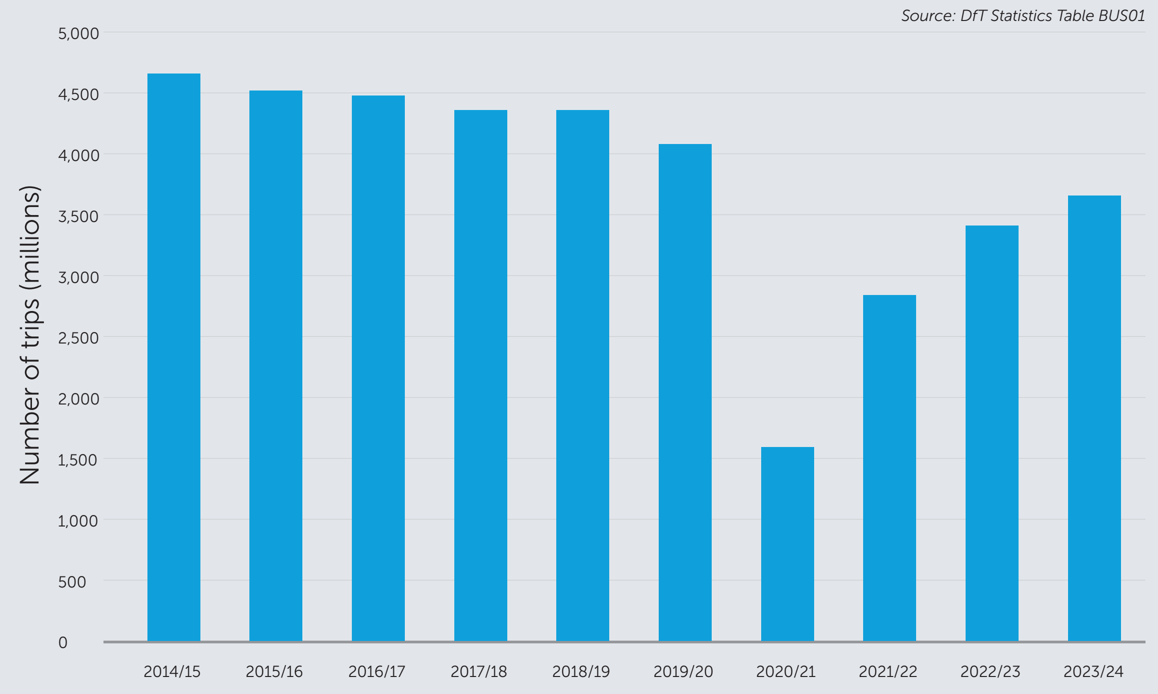
TRENDS BY MODE

Bus

The bus remains the most used form of public transport, accounting for 58% of all ticketed trips in England[32]. Despite this fact, bus patronage and provision have been in long-term decline.

In 2023/24, bus patronage reached 3.6 billion in England, an increase of 0.2 billion on the previous year[33]. However, this is 1 billion trips down on the 2014/15 figure and is only 90% of the 2019/20 figure, the last full year before Covid-19.

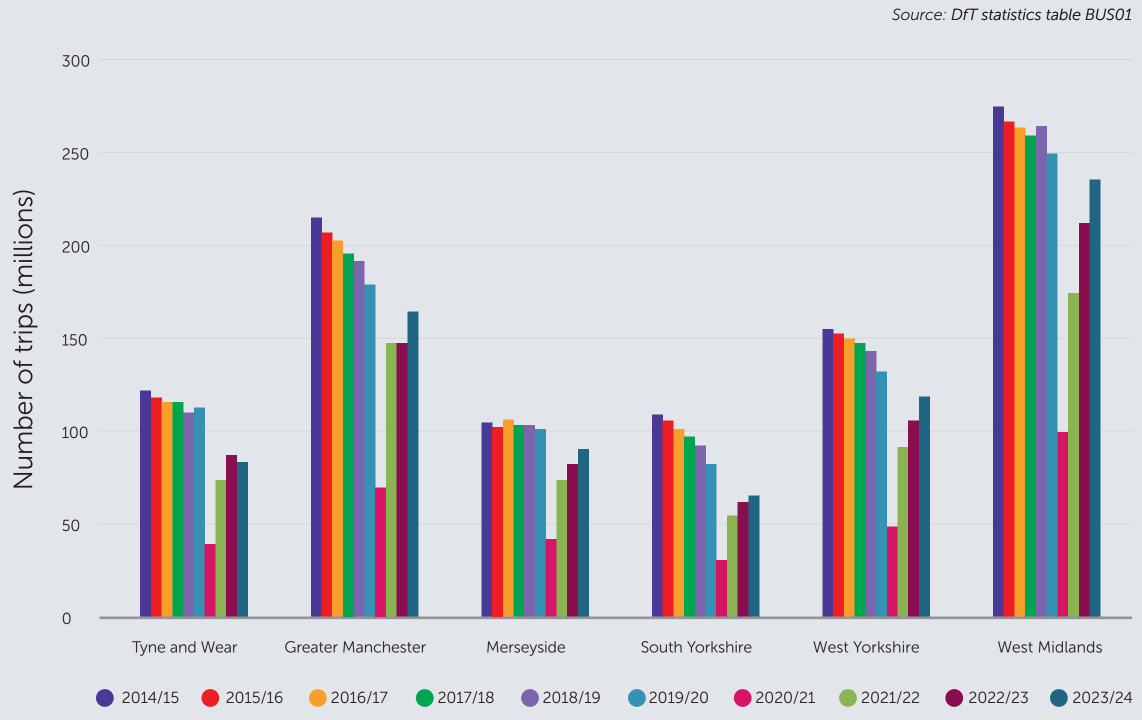
Bus patronage in England



Growth in patronage has been stronger in the city regions, with Greater Manchester reaching 92% of the 2019/20 figure, and the West Midlands hitting 95%[34]. This is reflected in the growth rates for the most recent year, where the West Midlands (11%), Greater Manchester (12%), and West Yorkshire (12%), are all above the national average of 7%.

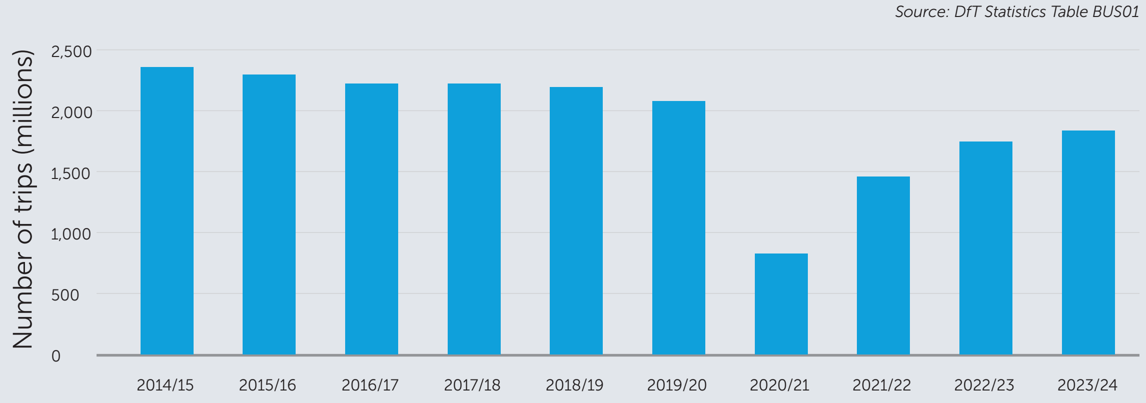
As noted in the previous section on devolution progress, Greater Manchester has adopted a franchised approach to delivery. The first tranche of franchised services entered operation in September 2023. Initial data shows increased patronage, passenger revenues exceeding targets, and overall punctuality improving by 14% compared to the same period in 2023.

Bus patronage in the city regions (outside London)



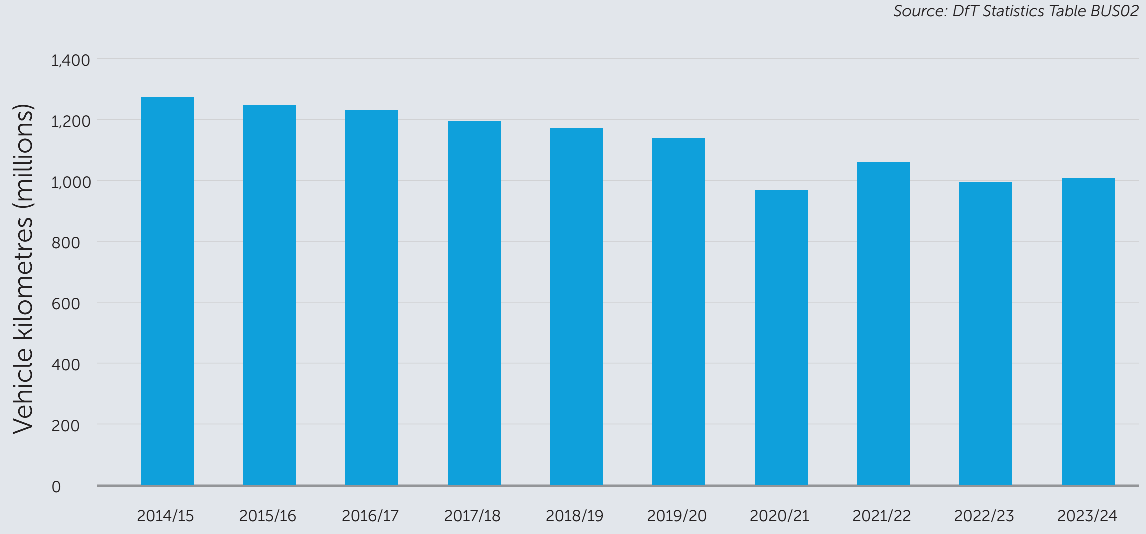
In London, bus patronage has reduced by 0.5 billion trips in the last ten years. Patronage is still 200 million (12%) below the pre-pandemic figure despite strong growth over the past three years.

Bus patronage in London



Looking at bus service provision, local bus service kilometres have been in long-term decline, with England seeing a 20% decrease in the last decade[35]. This overall figure hides deeper cuts across much of the country as London has only seen a 6% reduction in this time. In comparison, bus kilometres in the metropolitan areas have decreased by 25% over the last ten years.

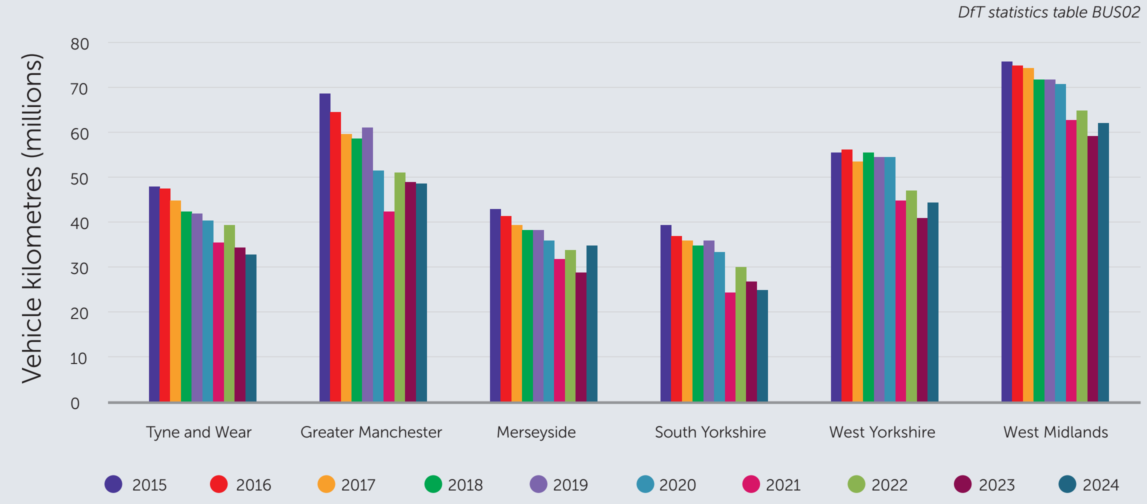
Local bus service kilometres in England



However, the most recent year presents a more positive story, with the metropolitan areas seeing local bus service provision increase by 3%. Whilst provision is still almost 14% beneath pre-Covid levels, this is welcome progress.

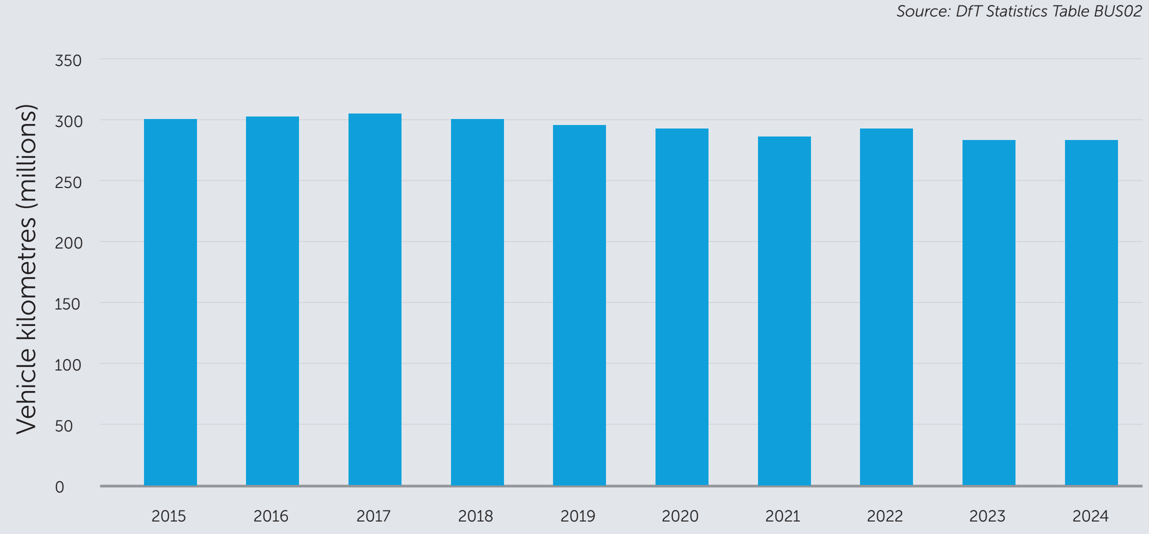
This growth has not been even across areas, with Merseyside, the West Midlands, and West Yorkshire leading the way.

Local bus service kilometres by area



Looking at London, the recent trend of small annual reductions, which began in 2017/18, has continued, with bus service kilometres down by 0.2% in the last year.

Local bus service vehicle kilometres in London



Summary

Although the recent increase in bus patronage and vehicle kilometres is welcome, this is set against a difficult decade for the bus. Over the period, patronage in England has fallen by one billion trips a year, and bus service kilometres have been cut by 20%.

Early indications from Greater Manchester are that bus reform can deliver positive results. We will track Greater Manchester's journey as they continue with franchising, and hope to see these benefits spread to other areas as they complete their bus reform journeys.

Heavy and Light Rail

Heavy Rail

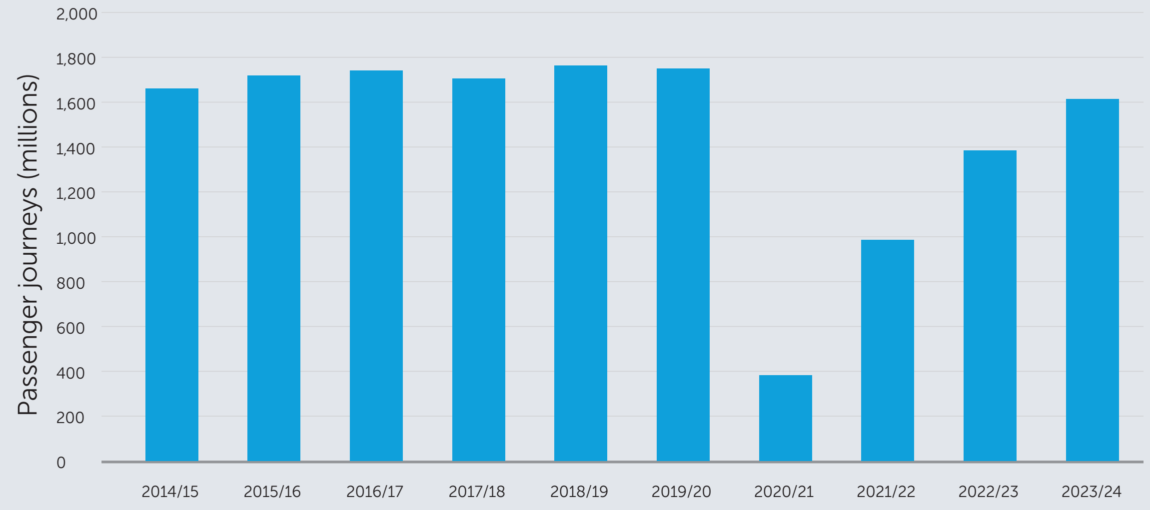
Rail plays a vital role in our city region economies, providing direct access to our city centres for large volumes of people as well as providing wider regional and national connectivity.

Rail patronage had been growing up to 2019/20, with small levels of growth for most years from 2014/15. However, the pandemic hit patronage hard, with working from home and restrictions on travel impacting significantly on core passenger flows.

In 2023/24, rail patronage continued its strong post-pandemic growth, with trips growing 16% compared to the previous year[37]. This means that patronage is now only 2% below 2014/15 levels, and 7% below 2019/20 (the last year before Covid-19). If this growth continues, patronage could exceed the pre-Covid levels in the next year.

Passenger rail journeys in Great Britain

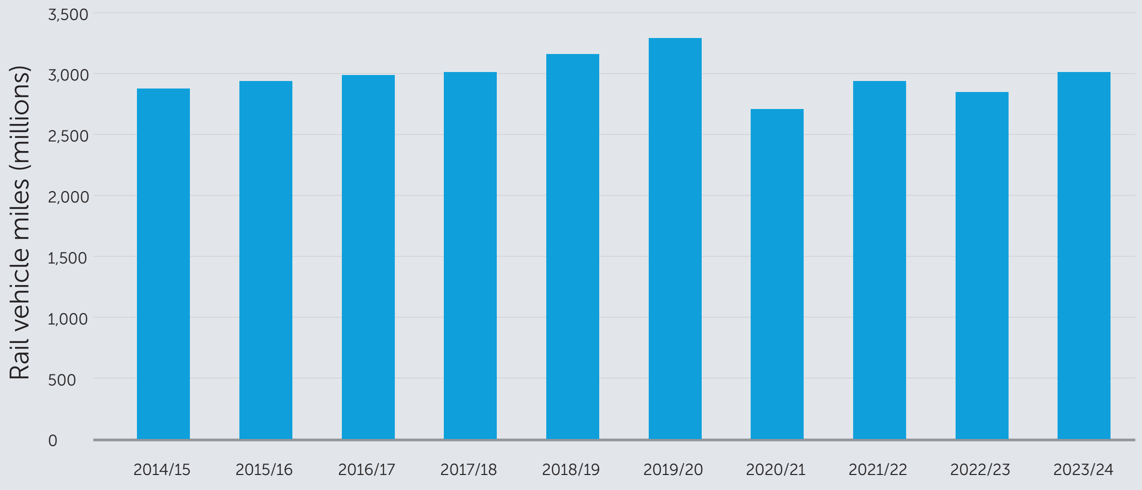
Source: Table 1220 - Passenger journeys ORR Data Portal



Looking at the level of rail service provision, measured through number of rail vehicle miles, this has increased by 5% over the past decade but fallen back since the peak level of service in 2019/20[38]. The ten year trend has returned to growth in the most recent year.

Number of rail vehicle miles

Source: Table 1253 - Passenger vehicle kilometres by operator ORR Data Portal



Interestingly, whilst rail patronage has returned close to previous levels, there has been a change in the types of tickets that people are buying, reflecting new travel patterns. All ticket types are recording similar revenue levels to the pre-pandemic period apart from season tickets, where revenue is down by two thirds compared to 2019/20[39]. With the movement away from the 4 or 5 day working week in the office since the pandemic, many people have switched from season tickets to paying when they need to travel. This also opens up other travel choices as people are no longer locked into rail travel through the upfront cost of the season ticket.

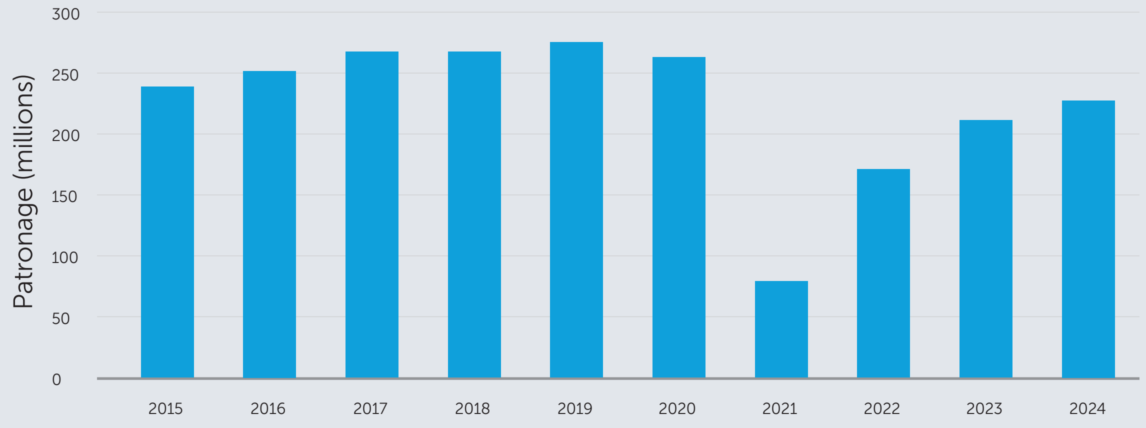
Light Rail

Light rail plays a significant role in the local transport network, moving high volumes of people efficiently across our busy urban areas. What is more, it has proven a popular choice for passengers, due to its reliability and accessibility.

Light rail patronage in England has seen a growth of 8% in 2023/24 (compared to 2022/23), with patronage reaching 229 million[40]. This is still 13% down on the 2019/20 figure, and 4% down on the last decade.

Light rail patronage in England

Source: DfT Statistics Table LRT01



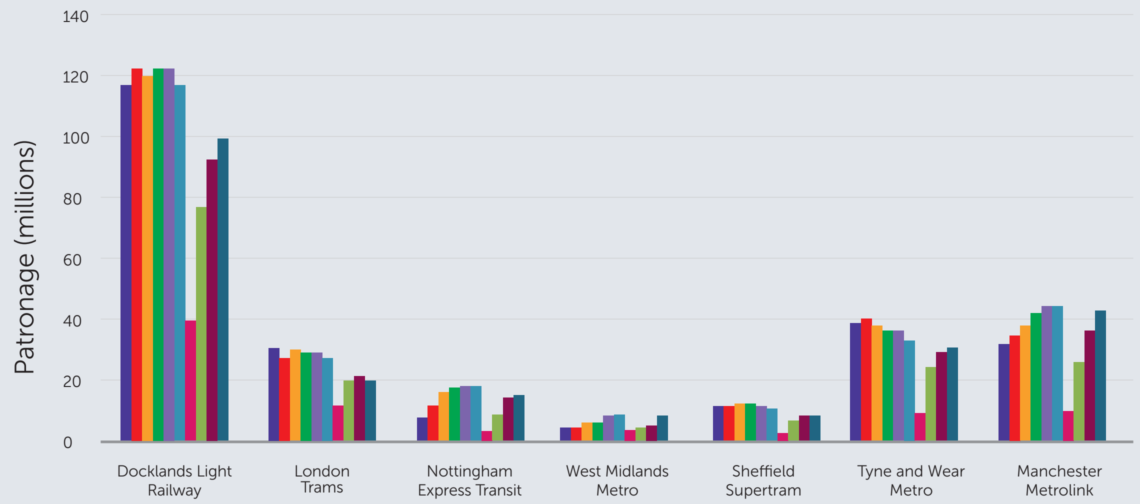
Looking at the city regions, there has been strong growth in the last year across many of the networks, with only London Tram seeing a decline due to operational factors.

The West Midlands Metro is now above its pre-Covid patronage base, with the Tyne and Wear Metro and Manchester Metrolink not far behind. With strong recent growth, it is likely that next year will tell a more positive story again.

It should be noted that the post-pandemic recovery on the West Midlands Metro was supressed until recently due to operational issues, which has contributed to the large increase in the most recent year.

Light rail patronage by area

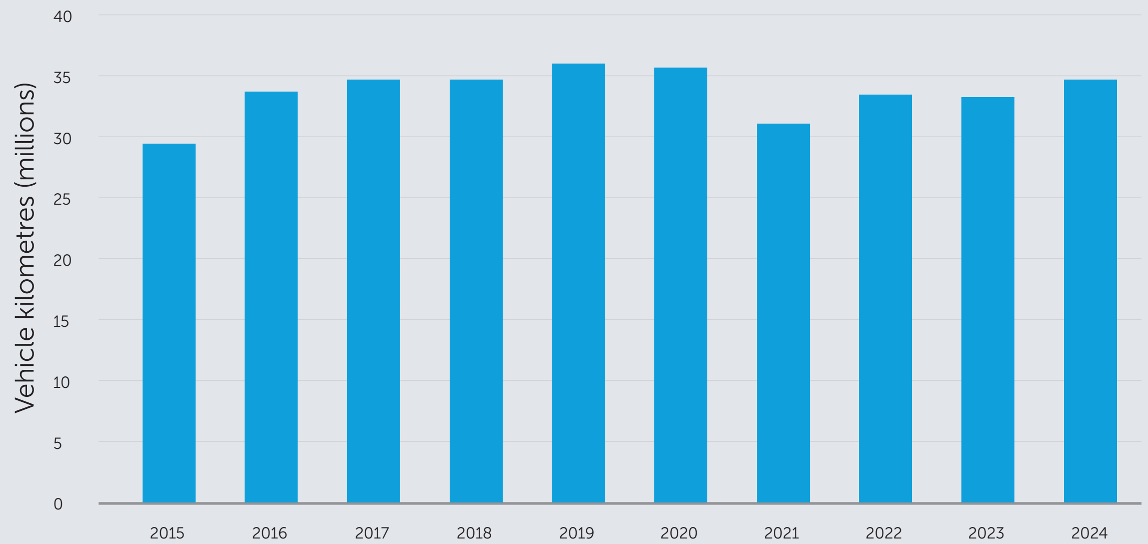
Source: DfT statistics table LRT01



Looking at service provision, light rail vehicle kilometres have grown over the last decade, reaching almost 35 million kilometres in 2023/24[41]. This is in part due to the success of light rail networks, but also reflects the extensions that have been built in this time. Provision is still lower than the 2019/20 level as some networks cut frequency to match the lower levels of demand and revenue.

Light rail vehicle kilometres

Source: DfT Statistics Table LRT01



Summary

Both heavy and light rail experienced strong patronage growth at the start of the last decade, which was interrupted by the Covid-19 pandemic. However, the recovery has been strong, with both heavy and light rail heading back towards 2014/15 patronage levels and indeed, likely to surpass them in the next year.

Even if patronage recovers to the pre-pandemic high, this would likely be below the levels that would have been expected in the absence of the Covid-19 pandemic.

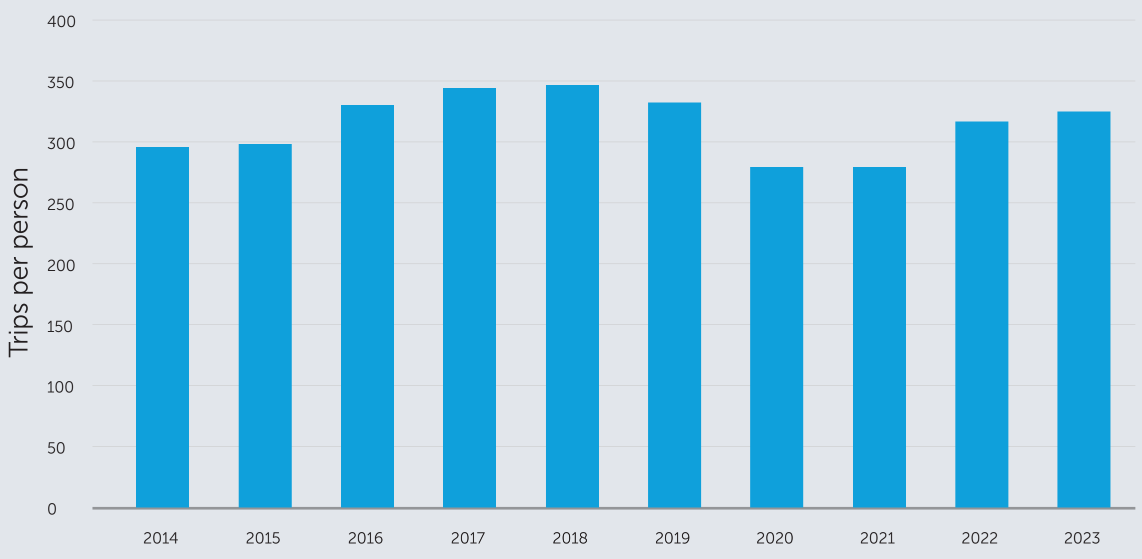
Active travel

Cycling, walking and wheeling continue to be vital modes of transport in our urban areas, providing people with affordable and sustainable travel choices.

Despite this, the level of cycling, walking and wheeling[42] trips per person has remained flat across England over the last decade, with limited growth in walking and wheeling trip stages, and a decrease in cycling trip stages shown in the national travel survey[43].

Number of walking and wheeling trips per person in England

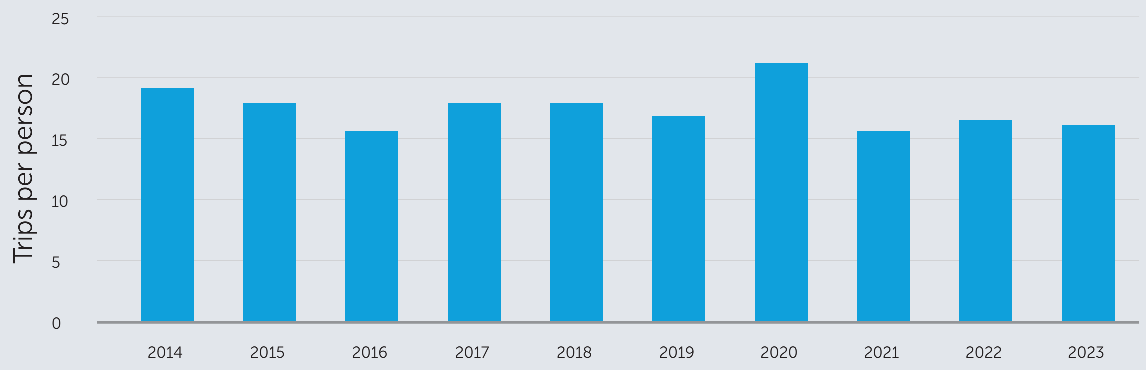
Source: National Travel Survey



Cycling trips boomed through the pandemic, with people having more free time and there being fewer cars on the road. However, since then, levels have fallen back below where they were in 2019[44].

Number of cycling trips per person in England

Source: National Travel Survey



However, there is evidence locally to suggest that some areas are bucking this trend. London reported that cycling levels grew by 5% in 2024, and are now 26% above pre-pandemic levels[45]. Similarly, key cycling routes in Greater Manchester have seen their busiest days ever in the last year, with October seeing up to 7,000 cyclists using the Oxford Road cycle way, compared to a monthly high of under 6,000 in 2019[46].

Summary

Cycling, walking and wheeling trends continue to largely flatline nationally, with a small growth over the past ten years in walking and wheeling and a reduction in cycling trips. Walking in particular has fallen back since the height of the pandemic.

However, where authorities are and implementing better walking, cycling and wheeling networks, we are seeing growth. The message continues to be where we invest in active travel schemes, the users will come.

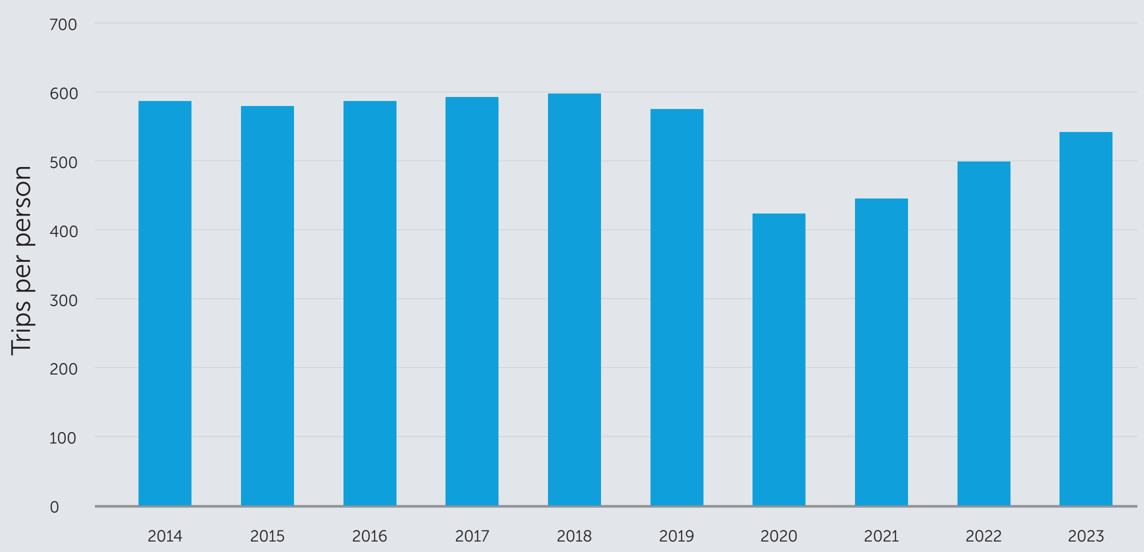
Road traffic

The number of trips per person as either a car or van driver or passenger has reduced slightly over the last decade, sitting at 548 trips per person, down from 590 trips per person in 2014[47].

However, there has been a 9% increase in 2023. If this trend continues, we are likely to see trips return to their pre-Covid high of 602 trips per person within the next year.

Number of car driver or passenger trips per person in England

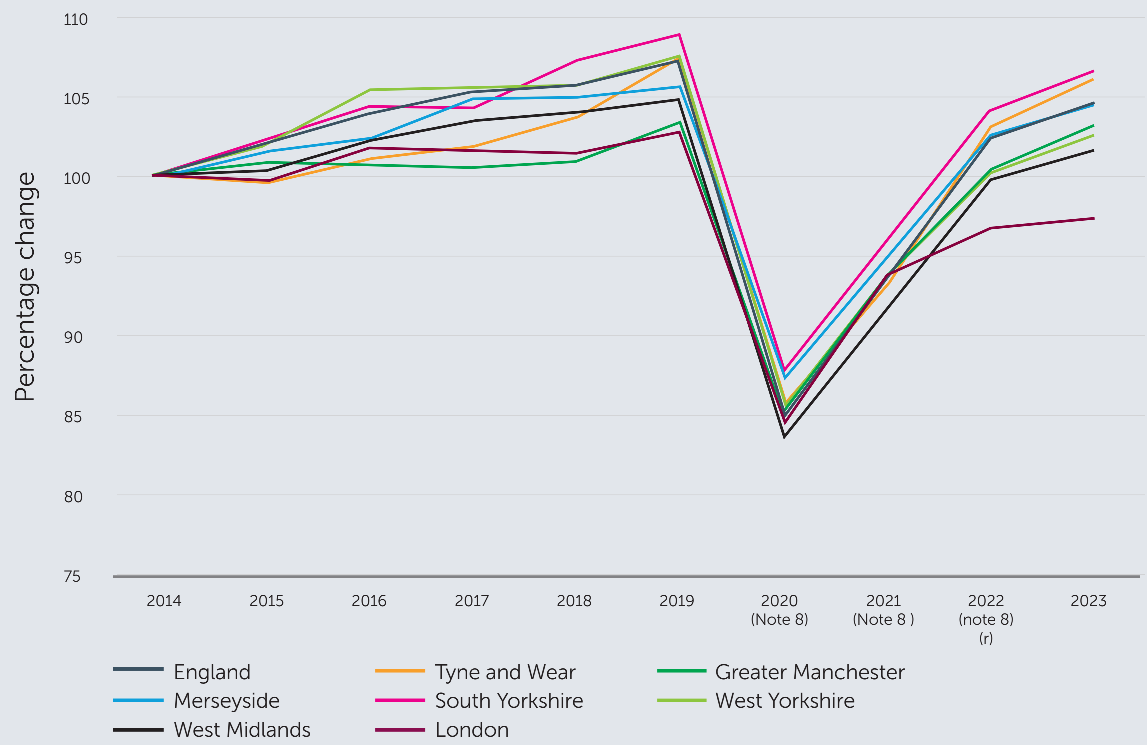
Source: National Travel Survey



If we look at the distance people drive, this has increased over the past decade, with a 5% increase across England. This trend is mirrored across the city regions, with only London seeing a moderate decrease over this time[48].

Change in vehicle miles by area (indexed)

Source: National Travel Survey



Although mileage is still 1-5% beneath pre-Covid levels, there has been growth in the most recent year across all Urban Transport Group's Principal Member areas.

Summary

Although the number of trips per person by car or van have decreased in England, in the city regions the number of vehicles kilometres driven has increased in the last decade. This is partly due to increasing populations, with the increasing number of people travelling within city regions outweighing the small reduction in the number of trips each person makes. The only outlier to this trend is London.

We need to ensure that people have access to a range of attractive choices for making their journey, allowing us to tackle congestion, to better connect communities to opportunities, and to ensure that our city regions can function effectively and efficiently to generate economic growth.

REFERENCES

1 UK Government (2025) Plan for Change https://www.gov.uk/missions
2 Department for Transport (2024) NTS 2023: Introduction and main findings - GOV.UK
3 Department for Transport (2024) NTS 2023: Introduction and main findings - GOV.UK
4 Office of Rail and Road (2024) Table 1253 - Passenger vehicle kilometres by operator | ORR Data Portal
5 Department for Transport (2024)NTS 2023: Introduction and main findings - GOV.UK
6 The Industry.Beauty (2024) Retail destinations remain resilient as footfall rises 3.3% in 2023 - TheIndustry.beauty
7 Department for Transport (2024) Statistics Table BUS01Annual bus statistics: year ending March 2024 (revised) - GOV.UK
8 Department for Transport (2024) Statistics Table BUS02 Annual bus statistics: year ending March 2024 (revised) - GOV.UK
9 Office of Rail and Road (2024) Table 1220 - Passenger journeys | ORR Data Portal
10 Department for Transport (2024) Statistics Table LRT01
11 Local Transport Today (2024) Cycling levels in London going up but public transport below
12 Manchester Evening News (2023) Manchester cycling records broken as bikes boom in popularity - Manchester Evening News
13 Department for Transport (2024) NTS 2023: Car availability and trends in car trips - GOV.UK
14 Office for National Statistics (2024) Regional gross value added (balanced) per head and income components - Office for National Statistics
15 Office for National Statistics (2024) Regional gross value added (balanced) per head and income components - Office for National Statistics
16 Office for National Statistics (2024) Regional gross value added (balanced) per head and income components - Office for National Statistics
17 West Yorkshire Combined Authority (2024) West Yorkshire Combined Authority
18 Office for National Statistics (2024) Regional gross value added (balanced) per head and income components - Office for National Statistics
19 OECD (2020) Enhancing productivity in UK Core Cities
20 Centre for Cities (2021) How the transport systems of big British cities measure up to their European counterparts | Centre for Cities
21 Open Transport North (2021), Real Journey Time, Real City Size, and the disappearing productivity puzzle. - Productivity Insights Network
22 Centre for Cities (2021) What public transport tells us about levelling up | Centre for Cities
23 Centre for Cities (2021) Measuring up; Comparing public transport in the UK and Europe's biggest cities
24 Transport for London (2024) The Elizabeth line continues to transform travel in London on its two-year anniversary - Transport for London
25 Transport for London (2024) The Elizabeth line continues to transform travel in London on its two-year anniversary - Transport for London
26 Transport for London (2024) The Elizabeth line continues to transform travel in London on its two-year anniversary - Transport for London
27 Department for Transport (2024) NTS 2023: Introduction and main findings - GOV.UK
28 Department for Transport (2024) NTS 2023: Introduction and main findings - GOV.UK
29 The Industry.Beauty (2024) Retail destinations remain resilient as footfall rises 3.3% in 2023 - TheIndustry.beauty
30 Department for Transport (2024) NTS 2023: Introduction and main findings - GOV.UK
31 Department for Transport (2024) NTS 2023: Introduction and main findings - GOV.UK
32 Department for Transport (2024) Statistics Table BUS01 Annual bus statistics: year ending March 2024 (revised) - GOV.UK
33 Department for Transport (2024) Statistics Table BUS01 Annual bus statistics: year ending March 2024 (revised) - GOV.UK
34 Department for Transport (2024) Statistics Table BUS01 Annual bus statistics: year ending March 2024 (revised) - GOV.UK
35 Department for Transport (2024) Statistics Table BUS02 Annual bus statistics: year ending March 2024 (revised) - GOV.UK
36 Department for Transport (2024) Statistics Table BUS04 Annual bus statistics: year ending March 2024 (revised) - GOV.UK
37 Office of Rail and Road (2024) Table 1220 - Passenger journeys | ORR Data Portal
38 Office of Rail and Road (2024) Table 1253 - Passenger vehicle kilometres by operator | ORR Data Portal
39 Office of Rail and Road (2024) Table 1212 - Passenger revenue by ticket type | ORR Data Portal
40 Department for Transport (2024) Statistics Table LRT01 https://www.gov.uk/government/collections/light-rail-and-tram-statistics
41 Department for Transport (2024) Statistics Table LRT01 https://www.gov.uk/government/collections/light-rail-and-tram-statistics
42 DfT includes trips by non-motorised wheelchairs in its walking statistics.
43 Department for Transport (2024) Walking and cycling statistics, England: Introduction and main findings (National Travel Survey) - GOV.UK
44 Department for Transport (2024) Walking and cycling statistics, England: Introduction and main findings (National Travel Survey) - GOV.UK
45 Local Transport Today (2024) Cycling levels in London going up but public transport below
46 Manchester Evening News (2023) Manchester cycling records broken as bikes boom in popularity - Manchester Evening News
47 Department for Transport (2024) NTS 2023: Car availability and trends in car trips - GOV.UK
48 Department for Transport (2024) NTS 2023: Car availability and trends in car trips - GOV.UK

URBAN TRANSPORT GROUP

Wellington House, 40-50 Wellington Street, Leeds LS1 2DE

T 0113 251 7204
E info@urbantransportgroup.org
www.urbantransportgroup.org