NUMBER CRUNCH: TRANSPORT TRENDS IN THE CITY REGIONS

URBAN TRANSPORT GROUP

INTRODUCTION

The Urban Transport Group aims to be at the heart of a transport debate driven by good data and analysis – which is why we created Britain's first interactive urban transport Data Hub[1]. Our Data Hub is a powerful tool which allows you to generate your own customised visualisations (such as bar charts and pie charts) based on data you want to show. You can then easily create an online URL for that visualisation which you can insert into reports, websites and social media channels.

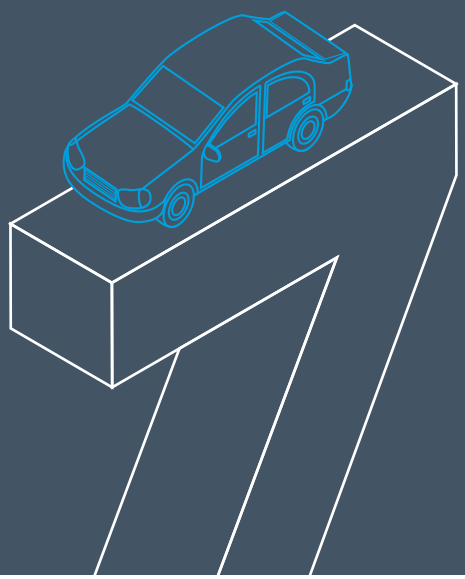
In this report we have used the Data Hub to crunch the numbers, and to identify some of the key transport, economic and population trends for the UK's largest city regions over the last decade.

For the purposes of this report, we cover 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.

City regions cover both the core city (such as the city of Manchester) with the wider sub region in which the core city sits (such as Greater Manchester, which also contains Stockport, Oldham, Trafford, Bury and so on) given that local transport systems and economies function at this city region level.

However, data is not always available at the city region level, and sometimes relevant insights can also be drawn from national, regional or sub-city regional data sets, so the report also draws on these data sets where appropriate.

We have also sought to use data sets covering the last ten years – however, this is not always possible due to changes in the way the data has been put together during these years.



1. The data hub is freely available on our website **http://www.urbantransportgroup.org/insight**

Authors: Tom Ellerton and Jonathan Bray. April 2018.

CONTENTS

HOW CITY REGIONS AND THEIR ECONOMIES ARE CHANGING

ALL THE CITY REGIONS HAVE GROWING POPULATIONS AND ECONOMIES, WITH LONDON LEADING THE WAY


POPULATION GROWTH OF 19% IS EXPECTED ACROSS THE CITY REGIONS BY 2039 COMPARED TO 16% ACROSS ENGLAND AND 8% FOR ENGLAND OUTSIDE OF LONDON


IT IS PREDICTED THAT THE OVER 75 POPULATION WILL GROW BY 80% BY 2039, SIGNIFICANTLY ALTERING CITY REGION DEMOGRAPHICS

ECONOMIC TRENDS

CITY REGION ECONOMIES ARE GROWING. HOWEVER, THEY ARE GROWING DIFFERENTIALLY BOTH BETWEEN CITY REGIONS AND WITHIN CITY REGIONS. THE BIGGEST DIFFERENTIALS BEING BETWEEN LONDON AND THE METROPOLITAN AREAS

The economic geography of England is complex and analysed in more detail by bodies like Centre for Cities[2]. However, there are a number of overarching trends.

Cities are key economic drivers – including the cities within the Metropolitan areas. London has by far the strongest economy with a GVA per head of population of £43,629 compared with the England average of £26,129[3].

The wider South East economy outperforms other regions with a GVA per head of £27,847. Overall the Metropolitan areas underperform when compared with the rest of England outside London. In 2015, the GVA per head of population for England outside of London was £22,837, sitting just above the Metropolitan area average.

Rates of growth in GVA per head since the recession are shown in the table[4] (see graph opposite). Since 2005, GVA has grown across the Metropolitan areas by around 20%, with Merseyside seeing the fastest growth at 25%, whilst London has grown by 32%.

However, there has been higher growth in the core cities of the Metropolitan areas, with Manchester growing by 25% over the same time period, Liverpool by 26%, and Birmingham by 22%.

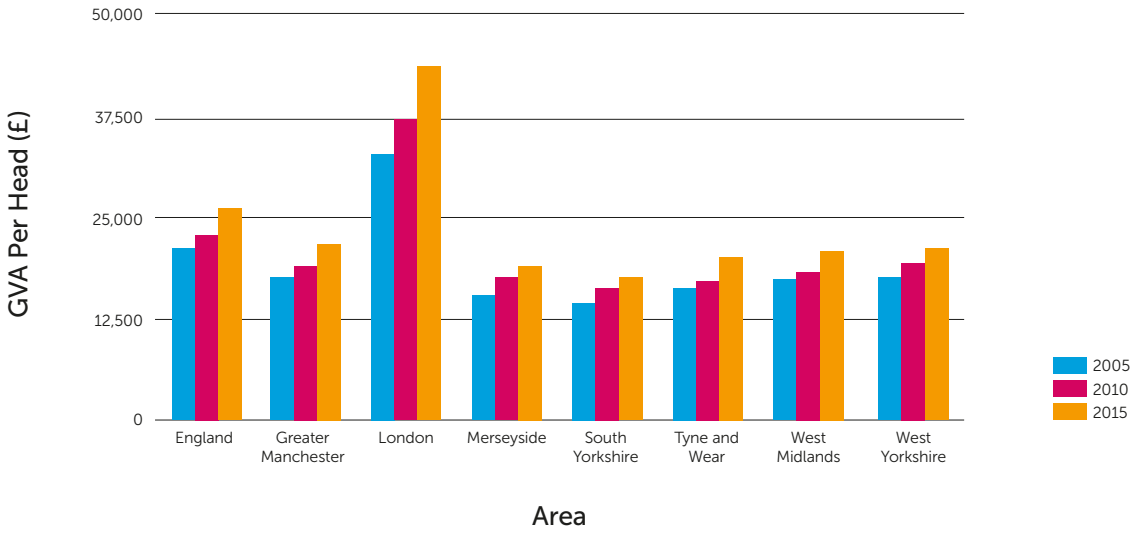
Figures for the last available year show that GVA growth per head in the Metropolitan areas was faster than in England as a whole and in London[5] (see table below).

The graph opposite shows **changes in job density**[6] (i.e. the number of jobs per head of population) which has grown in all areas since the recession but remains below pre-recession levels in some areas.

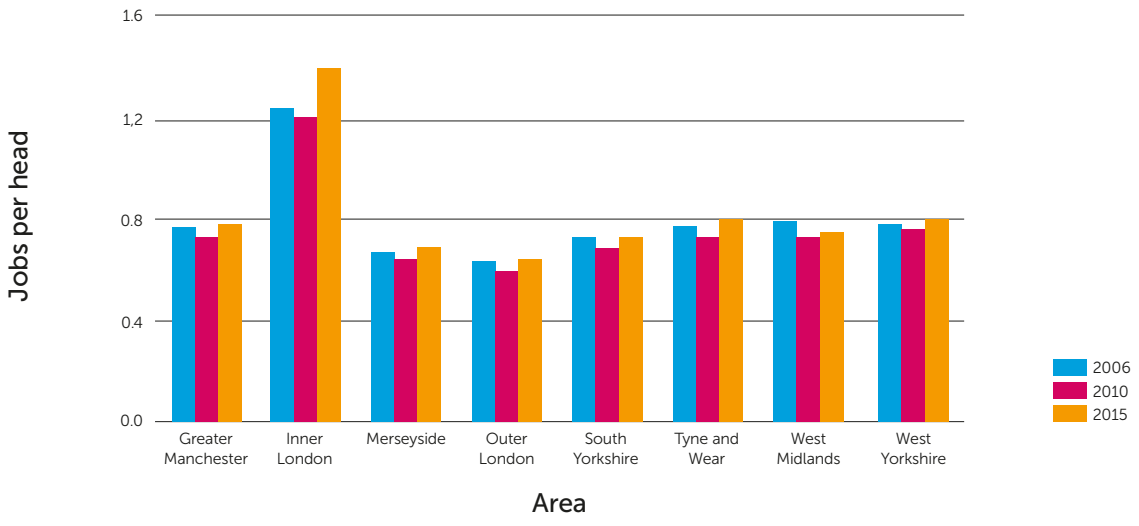
ENGLAND	GVA GROWTH PER HEAD FROM 2014 TO 2015
England	2.1%
Greater Manchester	3.0%
London	1.6%
Merseyside	3.1%
South Yorkshire	2.4%
Tyne and Wear	3.6%
West Midlands	2.8%
West Yorkshire	2.8%

2. For example, the Centre for Cities, Cities Outlook 2018 http://www.centreforcities.org/publication/cities-outlook-2018/
3. ONS GVA Estimates https://www.ons.gov.uk/economy/grossvalueaddedgva/bulletins/regionalgrossvalueaddedincomeapproach/december2016
4. ONS GVA Estimates https://www.ons.gov.uk/economy/grossvalueaddedgva/bulletins/regionalgrossvalueaddedincomeapproach/december2016
5. ONS GVA Estimates https://www.ons.gov.uk/economy/grossvalueaddedgva/bulletins/regionalgrossvalueaddedincomeapproach/december2016
6. ONS GVA Estimates https://www.ons.gov.uk/economy/grossvalueaddedgva/bulletins/regionalgrossvalueaddedincomeapproach/december2016

GVA PER HEAD OF POPULATION BY AREA (£)



JOBS PER HEAD OF POPULATION BY AREA

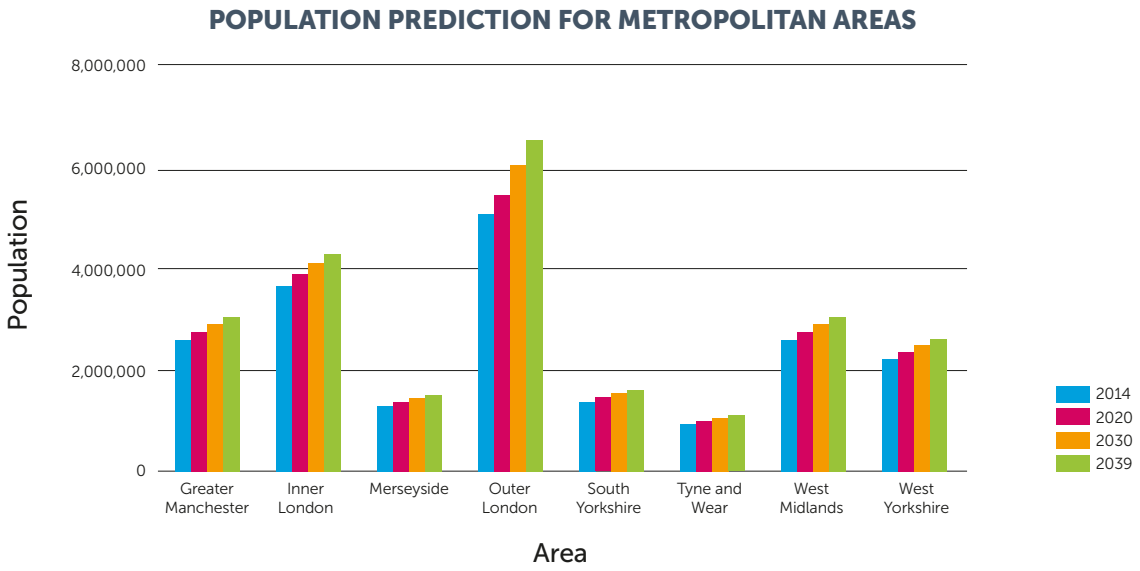


POPULATION TRENDS

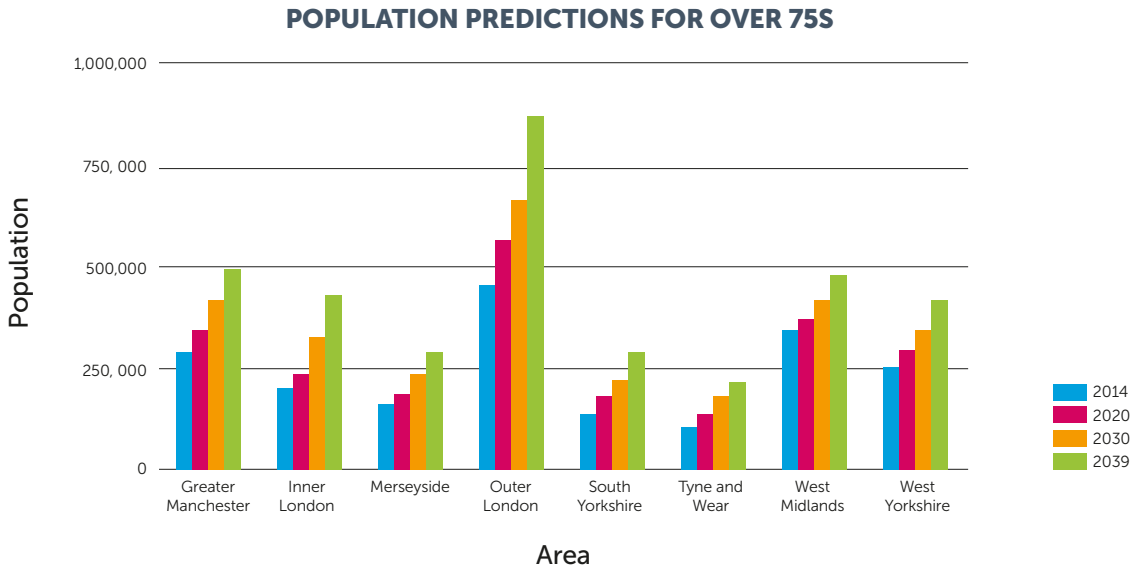
HAVING ENDURED A SUSTAINED PERIOD OF POPULATION DECLINE FOLLOWING DE-INDUSTRIALISATION, CITY REGION POPULATIONS ARE GROWING AGAIN

City region populations are also expected to grow faster than the rest of England with a forecast growth of 19% across the city regions by 2039[7], and 12.5% in the Metropolitan areas. This compares to a growth rate of 8% for England outside of the city regions.

However, the most notable trend is the **growth of over 75s**, with a predicted growth of 80% (1.3 million to 2.4 million) for this age group in the city regions, by 2039[8].



7. ONS Mid-Year Population Estimates **https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates**
8. ONS Population Predictions **https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections**



ANALYSIS

City region economies are growing. However, they are growing differentially both between city regions and within city regions. The biggest differentials being between London and the Metropolitan areas, as well as between core cities and other urban centres within the Metropolitan areas.

The city regions are key to the existing UK economy but there is much that could be done to further realise their full potential in a more balanced way. Investing in transport can play a key role in supporting this through widening labour markets, underpinning city centre agglomeration economies and through improving connectivity and reducing the costs of moving people, goods and services.

The population of the city regions has grown over recent years, and is forecast to increase further. At the same time the population is ageing significantly.

Rising urban populations will put additional strains on both the housing market and transport systems. Investing in transport can address both these challenges. For example, new and higher capacity rail services can open up brownfield sites for housing, widen commuter catchment areas and support densification of housing around key interchanges.

An ageing population also raises issues for transport planning including concessionary travel budgets and the accessibility of transport networks.

HOW TRANSPORT PATTERNS ARE CHANGING

NATIONALLY THE AVERAGE PERSON MADE 954 TRIPS IN 2016[8], A DECREASE FROM 976 TRIPS IN 2007. THIS IS PART OF A LONGER TERM DECLINE, WITH TRIPS PER PERSON DECLINING FROM A PEAK OF 1,097 TRIPS IN 1978/79

If we do not take into account the 2016 figure (which was affected by a change in methodology), **there has been a 6% reduction in the number of trips since 2007**[9].

Nationally the **average trip length** was 6.81 miles[10] in 2016[12]. The average trip distance has fluctuated over the last ten years within a fairly narrow band.

Nationally the vast majority of trips are made by car or van, or on foot[13].

However, these are national figures and **in cities other patterns are emerging**, including a shift in peak hour market share from cars to trains into city centres like Birmingham.

KEY TRENDS

Nationally people are travelling less often – including for shopping, commuting and business. These national trends are also being reflected in cities.

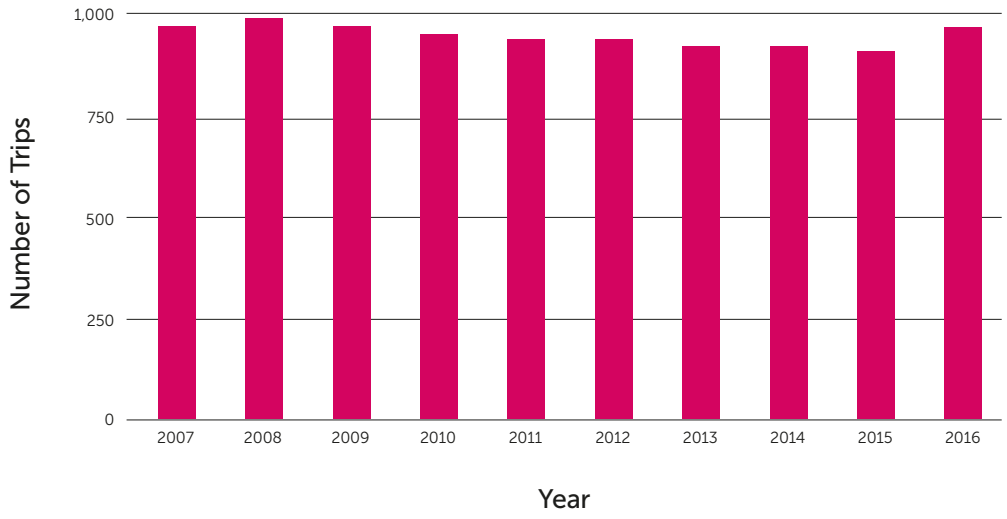
Nationally people make more trips by car than by any other means – but in cities other patterns are emerging, with the car becoming steadily less dominant, particularly in London and at peak times more widely.

COMMUTER MODE SHARE INTO BIRMINGHAM IN THE MORNING PEAK

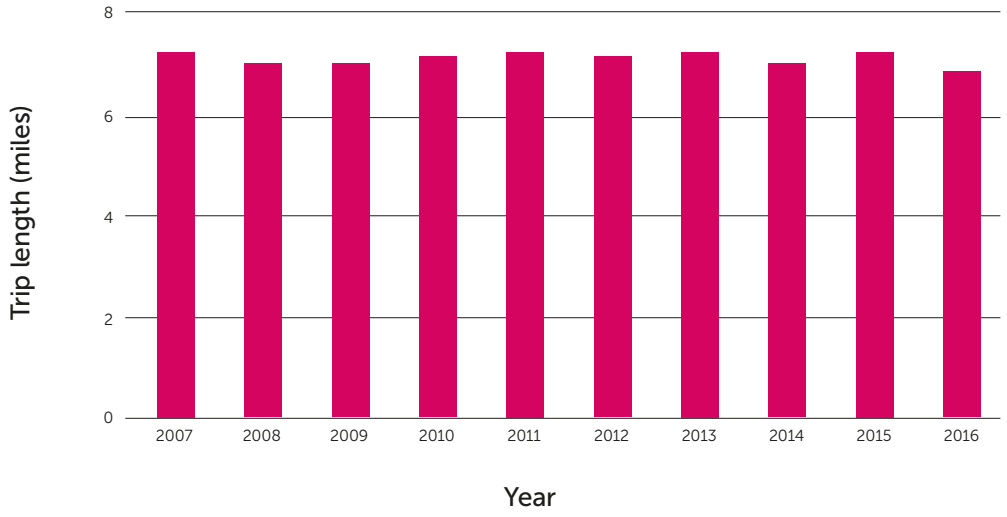
MODE	2011	2013	2015
BUS	25,749	25,179	25,315
RAIL	27,798	27,506	35,085
METRO	1,687	1,538	299
CAR	37,256	39,751	35,658
TOTAL	92,490	93,974	96,357

8. National Travel Survey table NTS0303
9. National Travel Survey table NTS0303s
10. The 2016 increase in trips reflects a correction in the methodology around short walking trips
11. National Travel Survey Table NTS0306
12. The 2016 increase in trips reflects a correction in the methodology around short walking trips which could reduce the average trip length
13. National Travel Survey Table NTS0303

AVERAGE NUMBER OF TRIPS PER PERSON OVER TIME



AVERAGE TRIP LENGTH

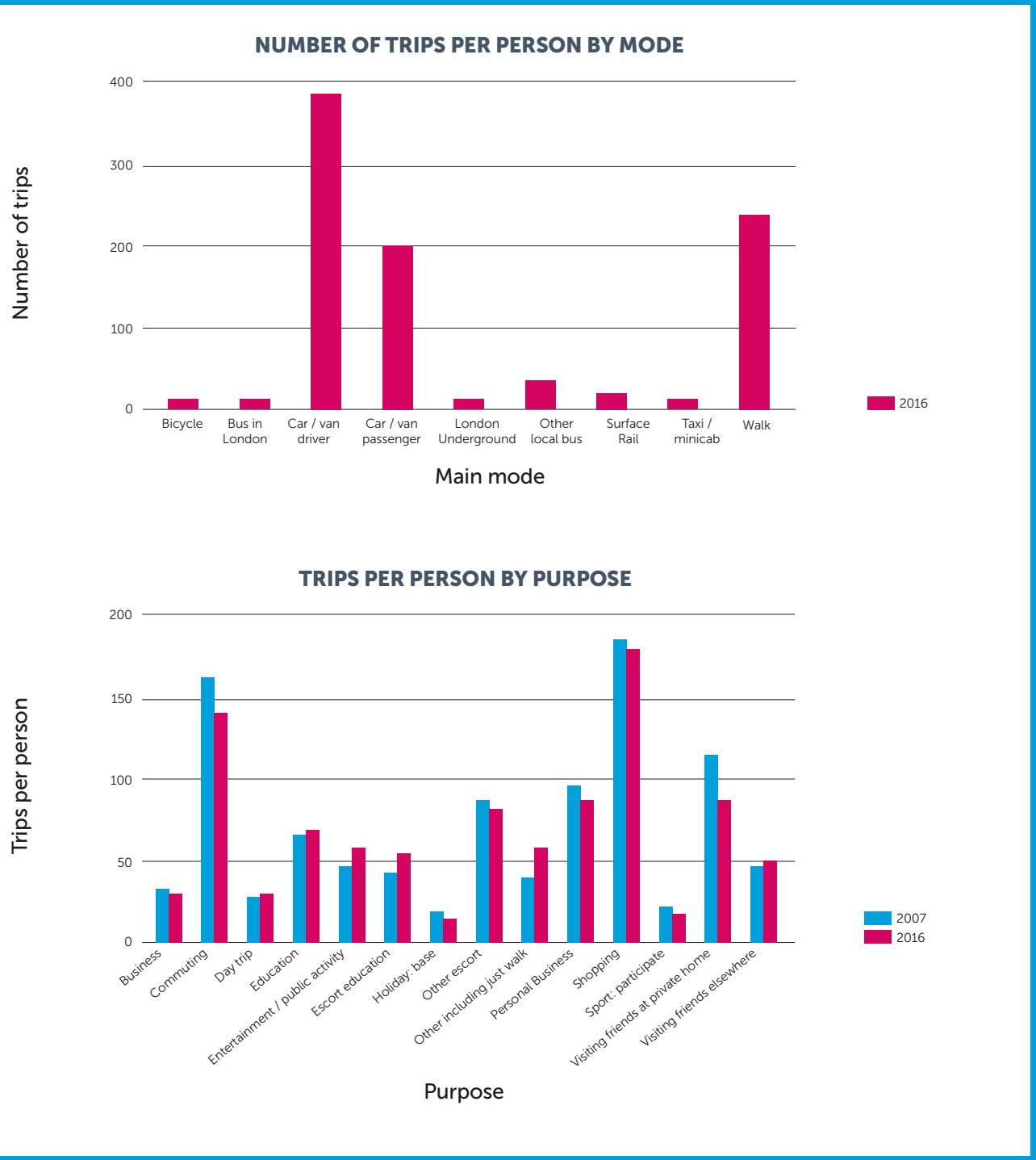


There has been an overall decline of 11.6% in car driving trips in London between 2000 and 2016, with trips by private transport in London now down to 37% of all trips compared with 47% in 2000.

Nationally, the main reasons why people travel are shopping and commuting[14]. However, over the last ten years shopping trips per person are down by 15% and commuting trips down 14%.

There have also been significant decreases in the number of trips made to participate in sport (-22%), to visit friends (-18%) and for personal business (-22%). However, there have been increases in the number of trips per head to escort people to education (19%) and trips to entertainment and public activity (16%).

14. National Travel Survey Table NTS0403



ANALYSIS

Many factors lie behind these headline trends which will also play out differently in different 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 working patterns (with more part time and home working); and the home as a place for shopping and leisure.

At Urban Transport Group we are sharing research and evidence on how transformative social and technological change is re-shaping travel patterns and behaviours.

TRENDS BY MODE: BUS TRENDS

NATIONALLY 70% OF ALL PUBLIC TRANSPORT JOURNEYS WERE MADE USING THE BUS, IN 2016/17

Bus patronage in the Metropolitan areas is in long term decline having fallen by 11% from 1.1 billion in 2009/10 to 937 million in 2016/17. This is in line with a longer period of decline which has seen patronage figures fall almost every year since 1975 when patronage was 2.6 billion.

After a long period of remarkable growth dating back to 1982 when patronage in London was only just over 1 billion, patronage has declined over the last three years to 2.2 billion.

The fall in **bus trips per head** of population is larger than the fall in total passenger journeys, implying that it is only population increase that is preventing bus patronage from falling more quickly in the city regions. London has experienced the largest fall, losing 27 trips per head of population since 2009/10. The one exception to the rule is an increase in Merseyside in 2016/17 which has been driven by a better young persons' fares offer.

Service levels have fallen significantly (16%) in the Metropolitan areas in the last decade whilst increasing by 6% in London.

The number of **older and disabled concessionary trips** fell 13% in the Metropolitan areas between 2010/11 and 2016/17[14]. Despite the fall in patronage, the cost of providing concessionary travel for older and disabled people has increased to £1.17 billion, a rise of 34% over the last decade, as bus operators are reimbursed for carrying concessionary pass holders on the basis of a proportion of the normal fare (which is increasing – see below).

Fares increased by 28% above inflation in the Metropolitan areas between 2005 and 2016 compared with 25% in London and 7% in English non-Metropolitan areas[15].

KEY TRENDS

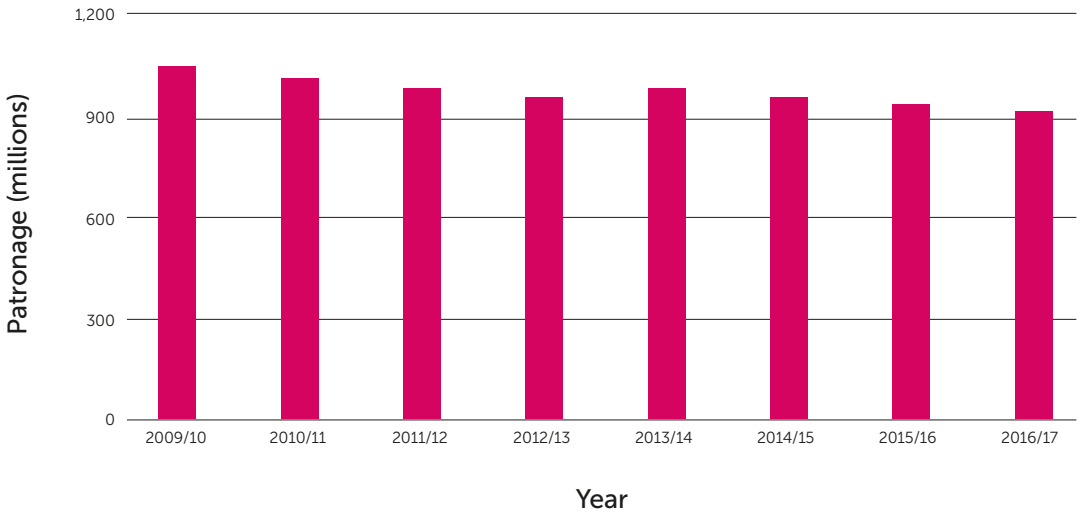
Most public transport journeys are made by bus.

Bus services are more extensive, simpler and more integrated in regulated London than they are in the deregulated Metropolitan areas.

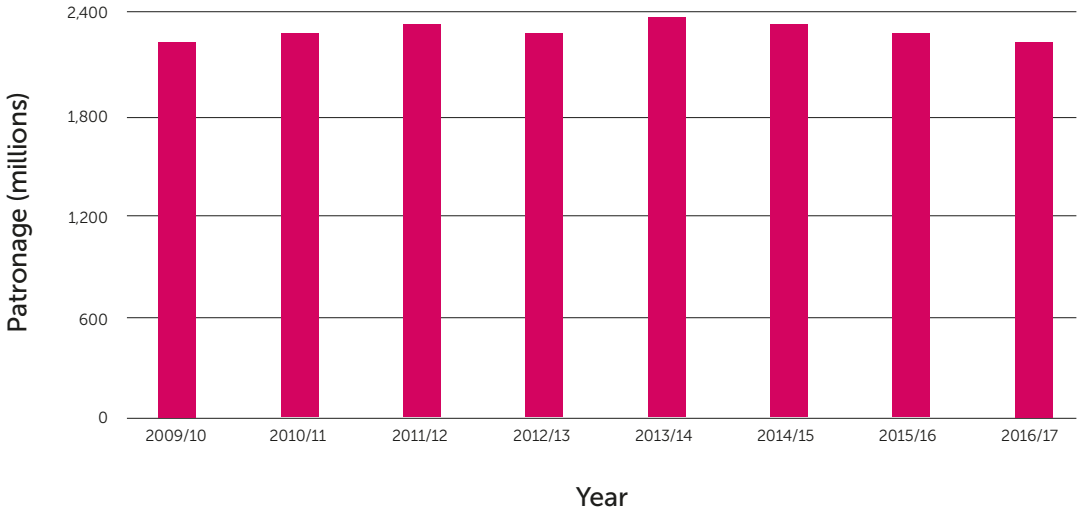
Bus use in London has had a very long period of patronage growth whilst the reverse is true in the Metropolitan areas. However, the bus is now in decline across the city regions – most recently in London and as part of a continuing long term trend in the Metropolitan areas.

15. DfT statistics table BUS0113

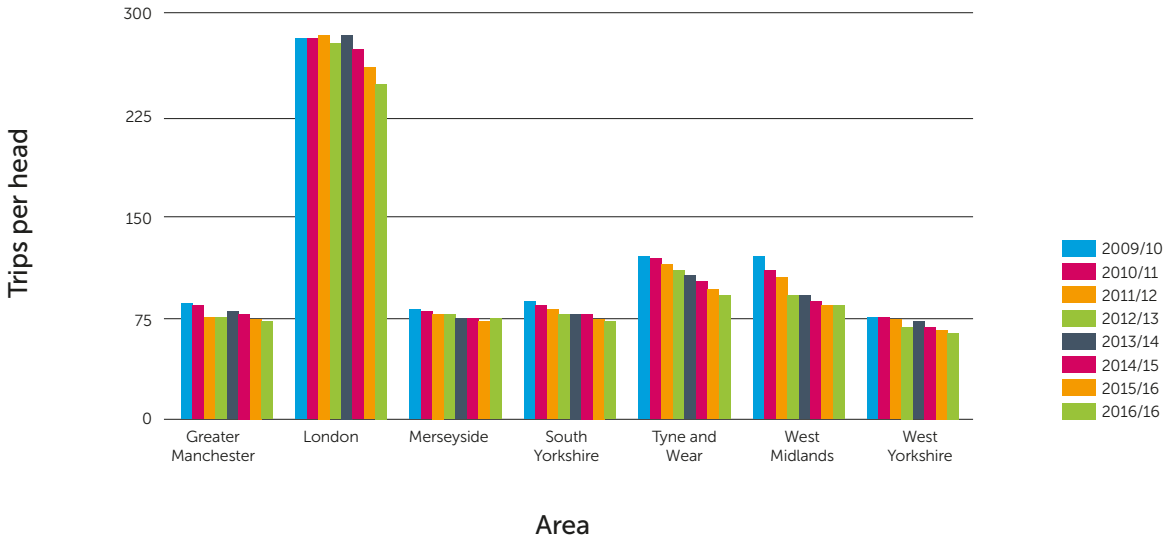
BUS PATRONAGE IN METROPOLITAN AREAS



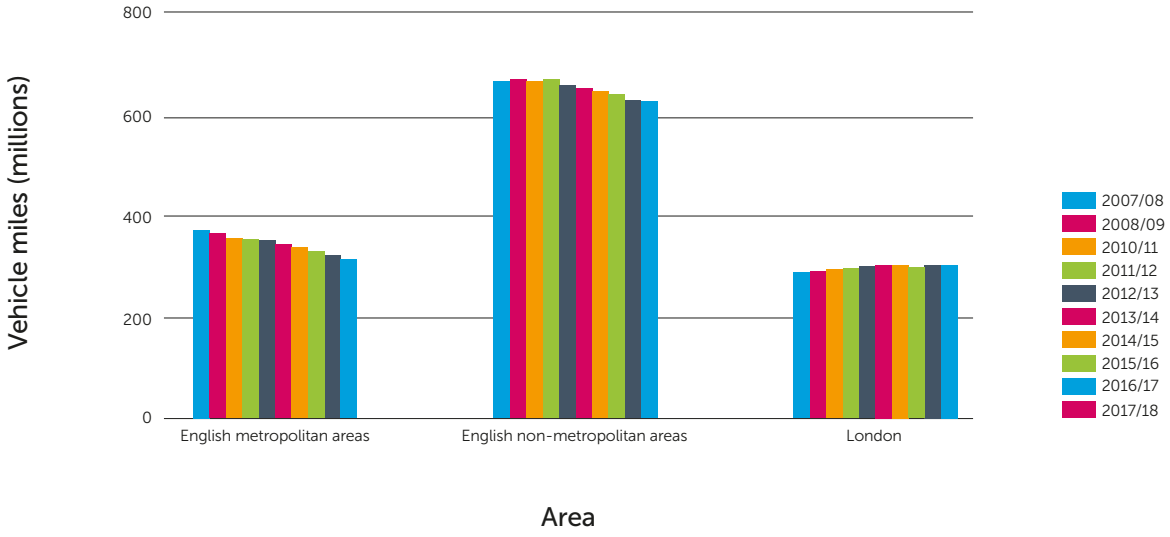
BUS PATRONAGE IN LONDON (MILLIONS)

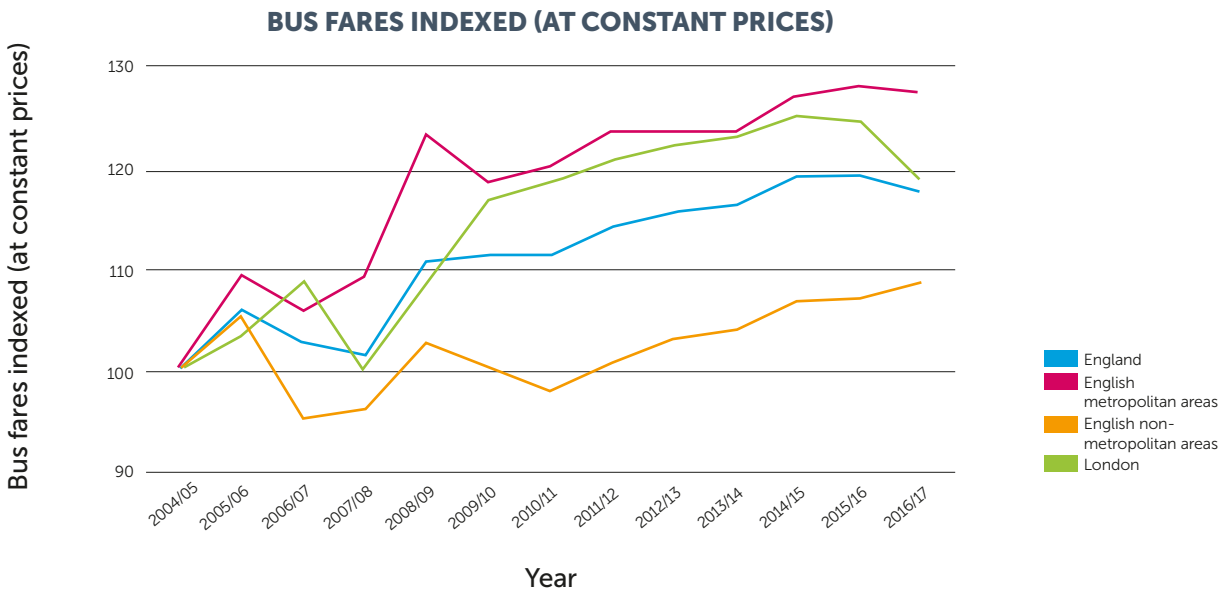


BUS TRIPS PER HEAD OF POPULATION



BUS VEHICLE MILES BY AREA TYPE (MILLIONS)





ANALYSIS

The urban bus faces a series of challenges including growing competition from taxis, traffic congestion, as well as in some places, rising car ownership and dispersed land use patterns. Outside London, bus services can also be fragmented, expensive, are not integrated and of variable quality due to bus deregulation.

New powers under the Bus Services Act 2017 should give the Metropolitan areas more effective tools with which to improve services.

UTG is also working together to look in more detail at the causes of bus service decline and to share effective approaches to successful bus provision.

RAIL TRENDS

GIVEN THE NATURE OF RAIL NETWORKS, THE STATISTICS DO NOT ALWAYS READILY MAP ONTO CITY REGION GEOGRAPHIES. HOWEVER, REGIONAL RAIL PATRONAGE (MOST CITY REGION LOCAL RAIL SERVICES OUTSIDE LONDON ARE CATEGORISED AS REGIONAL) HIT 388 MILLION IN 2016/17, AN INCREASE OF 36% SINCE 2007/08[17]

Across the London and South East network, there has been a 44% growth over the same period, although patronage has declined in the most recent year[18].

Behind the headline statistics there have been significant increases in rail use into city centres with Birmingham New Street seeing growth of 169% between 2006/07 and 2015/16, Leeds seeing growth of 71%, Liverpool Lime Street of 139%, and London Euston of 63%[19].

Rail's share of commuter traffic into some key city region centres has also grown significantly. In Birmingham, 36% of commuters accessed the city by rail in 2015 (an increase of 30% since 2011)[20].

This means that an additional 7,000 people per day are commuting into the city by rail. During the same time period the number of cars travelling into Birmingham fell by 2,000 per day.

Growth above and beyond the very high average growth levels is not restricted to the core city centre stations. For example where there has been investment, new developments or where the commuter market has been tapped, there have been some remarkable levels of growth. Examples include; between 2007/08 and 2016/17 patronage at Huddersfield grew by 91%, at Newton-le-Willows by 120%, at Coventry by 143%, at Rochdale by 81%, and at Wakefield Kirkgate by 50%[21].

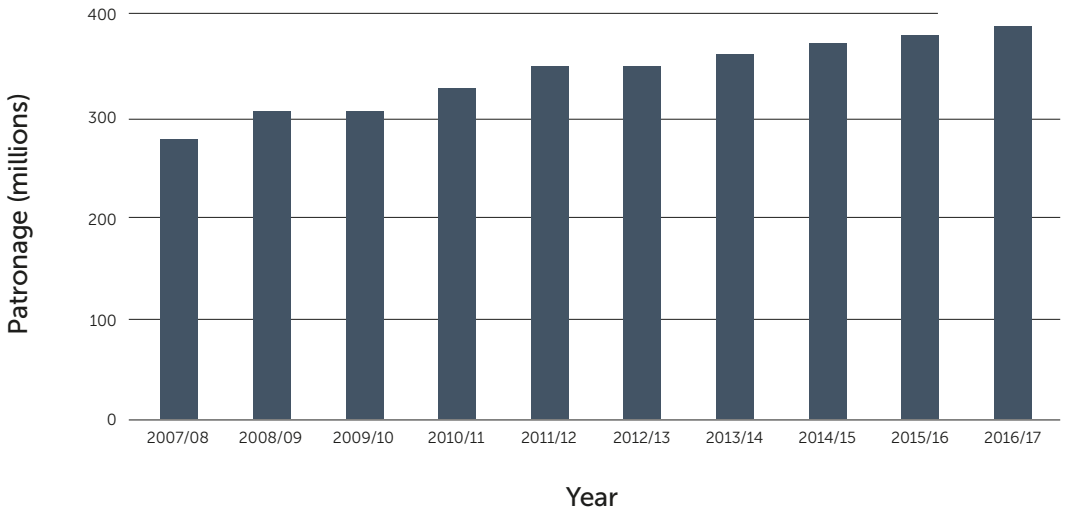
KEY TRENDS

There have been very high levels of growth in the last decade on the regional and urban rail networks which serve the city regions.

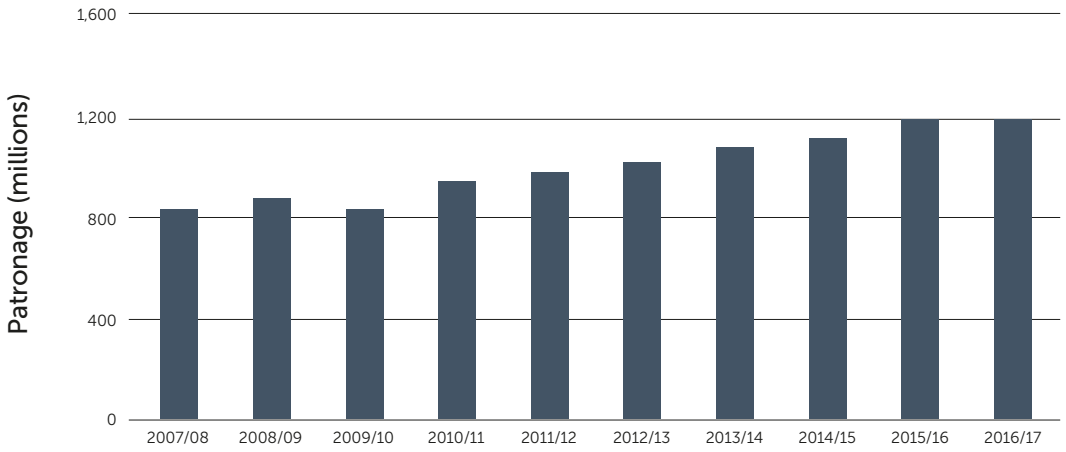
Commuter traffic into core city centre stations has risen at a rapid rate, with above average growth also seen into secondary centres and elsewhere in city regions.

17. ORR data portal
18. ORR data portal
19. ORR station entries and exits
20. TfWM, West Midlands Travel Trends 2016
21. ORR station entries and exits

RAIL PATRONAGE ON REGIONAL RAIL SERVICES



RAIL PATRONAGE ON LONDON AND THE SOUTH EAST SERVICES



ANALYSIS

Rail use in the city regions has been growing at a remarkable rate – despite limited investment in many city region rail networks. And where there has been investment, growth has been even more pronounced. Rail's intrinsic strengths of providing rapid and high capacity access and connections when compared with congested roads and the hassles of urban car use, has made the last ten years rail's decade. However, there has been some recent softening of demand in London and the South East which could be down to a combination of changing working patterns and poor performance on some parts of the South East rail network.

UTG has long argued that where devolution of funding and control over city region rail networks take place, then services improve for both passengers and the cities themselves. UTG is also part of a wider Rail Devolution Network to help make the case for further devolution in the rail sector. Furthermore, UTG makes the case for greater investment in urban and regional rail services – You can find out more about the case for rail devolution on our **microsite** and on the case for investment in urban and regional rail on our **website**.

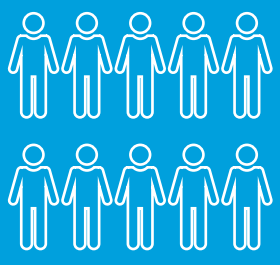
MASS TRANSIT AND MODERN TRAM TRENDS

LIGHT RAIL AND TRAM PATRONAGE HAS GROWN RAPIDLY IN THE LAST DECADE, WITH A 44% INCREASE SINCE 2007/08. THIS PERIOD HAS ALSO SEEN MAJOR EXPANSIONS IN MANCHESTER, LONDON AND NOTTINGHAM, WITH A 54% INCREASE IN PASSENGER KILOMETRES NATIONALLY THAT HAS BEEN ACHIEVED WITH A 52% INCREASE IN VEHICLE KILOMETRES[22]

Whilst growth has not been even over all networks (with some mitigating circumstances such as engineering works for major renewal projects), there has been considerable growth on the majority of networks, particularly where there has been investment. For example, Manchester Metrolink patronage nearly doubled between 2007/08 and 2016/17, whilst Nottingham's NET has seen growth of 25% in the most recent year alone.

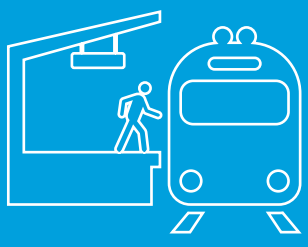
Patronage on the London Underground has continued to grow, reaching almost 1.4 billion trips per year in 2016/17. However, the growth rate slowed to 2% in the most recent year compared to an average growth of 4% over the previous five years[23].

KEY TRENDS



Patronage on light rail and modern tram systems has grown by 44% since 2007/08.

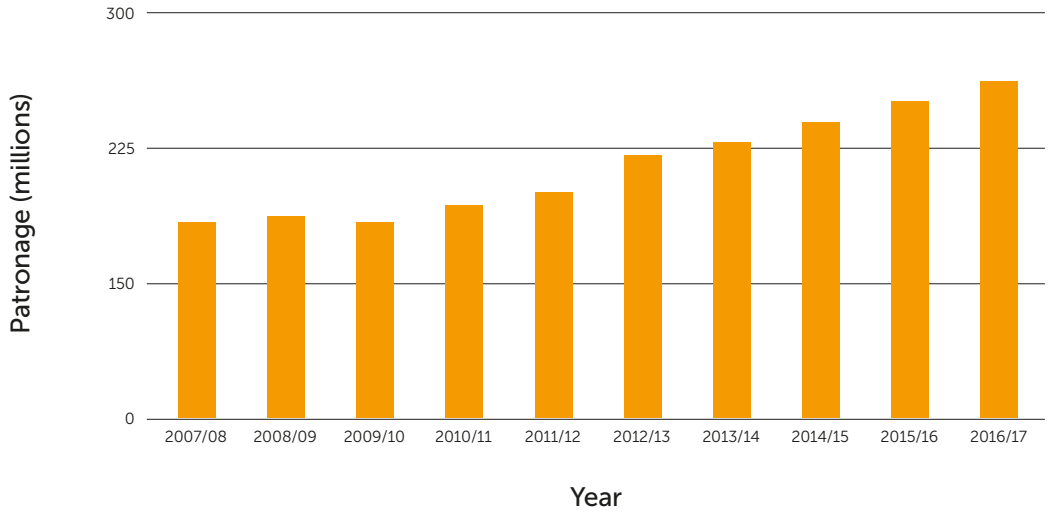
Where there has been investment in new lines and better services, the growth rate is significantly higher.



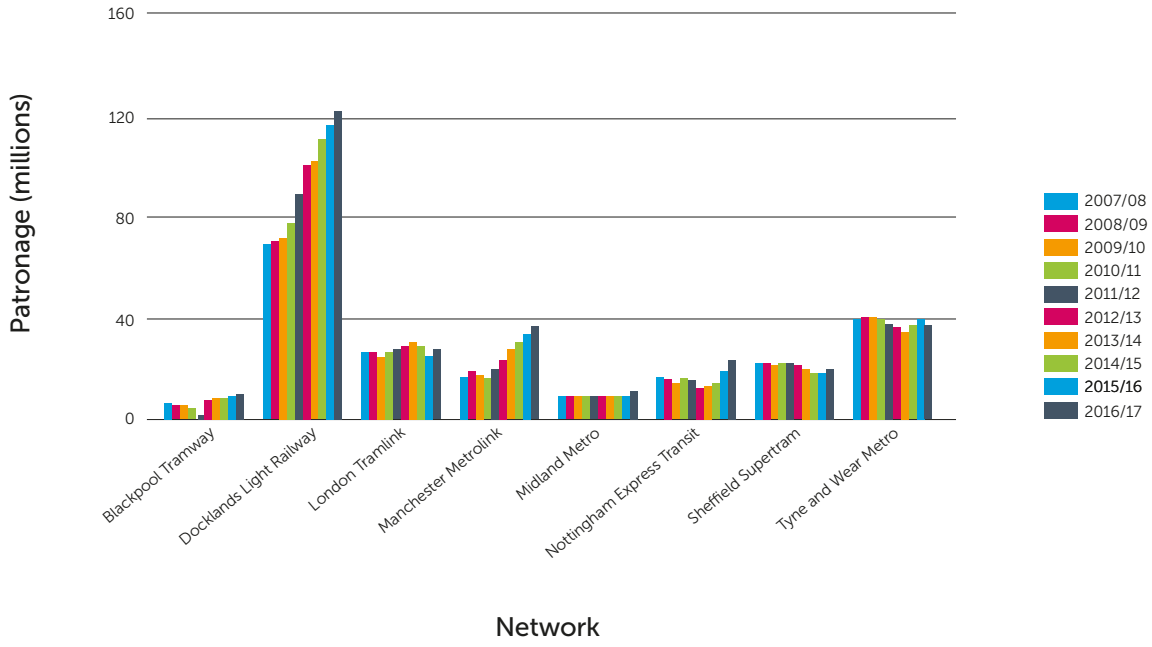
Patronage growth on London Underground has slowed after a decade of strong increases.

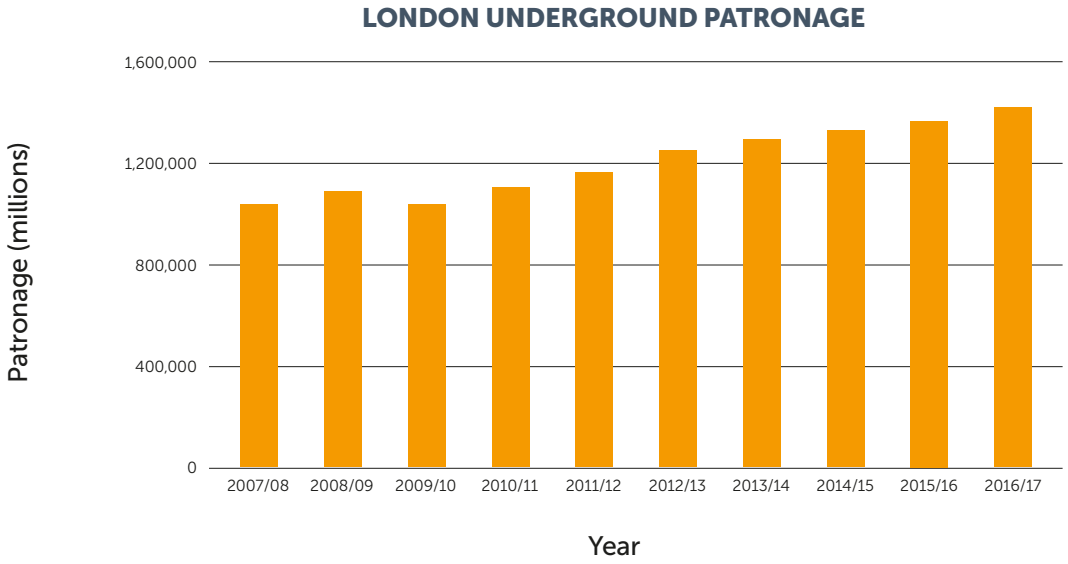
22. DfT Statistics table LRT01
23. TfL London Underground Performance Analysis

LIGHT RAIL PATRONAGE IN ENGLAND



LIGHT RAIL PATRONAGE BY NETWORK





ANALYSIS

Overall, the past decade has seen a growth in light rail and modern tram systems which continue to be popular with the travelling public particularly where they provide a frequent and reliable service with good access to key centres. The Docklands Light Railway has been the star performer in absolute and relative terms.

Whilst some systems have seen significant expansion and modernisation, others await their turn. The nature of the networks, and the local economies they serve, also influences patronage trends.

There continues to be growth on the London Underground, although this has slowed in the most recent year in line with the wider fall in the number of trips in London.

PRIVATE CAR AND VAN TRENDS

AS CAN BE SEEN FROM PAGE 12, NATIONALLY MORE TRIPS ARE MADE PER HEAD BY CAR OR VAN THAN BY ANY OTHER MEANS. THE NUMBER OF TRIPS WAS 389 PER HEAD IN 2016, A DECREASE OF 11% SINCE 2002[24]

Because the overall number of trips that people are making is falling at a faster rate, car and van trips now make up a greater proportion of all trips. Page 10 also showed that the national dominance of car travel is not always reflected in urban areas – particularly in London and at peak times more widely.

A number of significant recent national trends are becoming apparent in relation to holding of driving licences[25]. The number of young people with a driving licence has declined, whilst the number of older people (particularly women) with driving licences has increased. This means that there has been an overall increase in the number of people with driving licences in the last decade.

Recent research for the Department for Transport has shown the scale of the shift in young people's attitudes to motoring.

Driving licensing among young people peaked in 1992/4, with 48 per cent of 17-20 year olds and 75 per cent of 21-29 year olds holding a driving licence. By 2014, driving licence holding had fallen to 29 per cent of 17-20 year olds and 63 per cent of 21-29 year olds. In 2010-14, only 37 per cent of 17-29 year olds reported driving a car in a typical week, whilst the figure was 46 per cent in 1995-99. The research found the rise in lower paid and less secure jobs, a decline in home ownership and increased higher education participation were among the trends to have influenced the transport decisions of 17-29 year olds since 1990. Growing urbanisation, the high cost of driving and a preference for young people to communicate online—rather than face-to-face—are other contributory factors[26]. It is possible that the divergent trends between young and old people on car use and ownership could be exacerbated in the coming years.

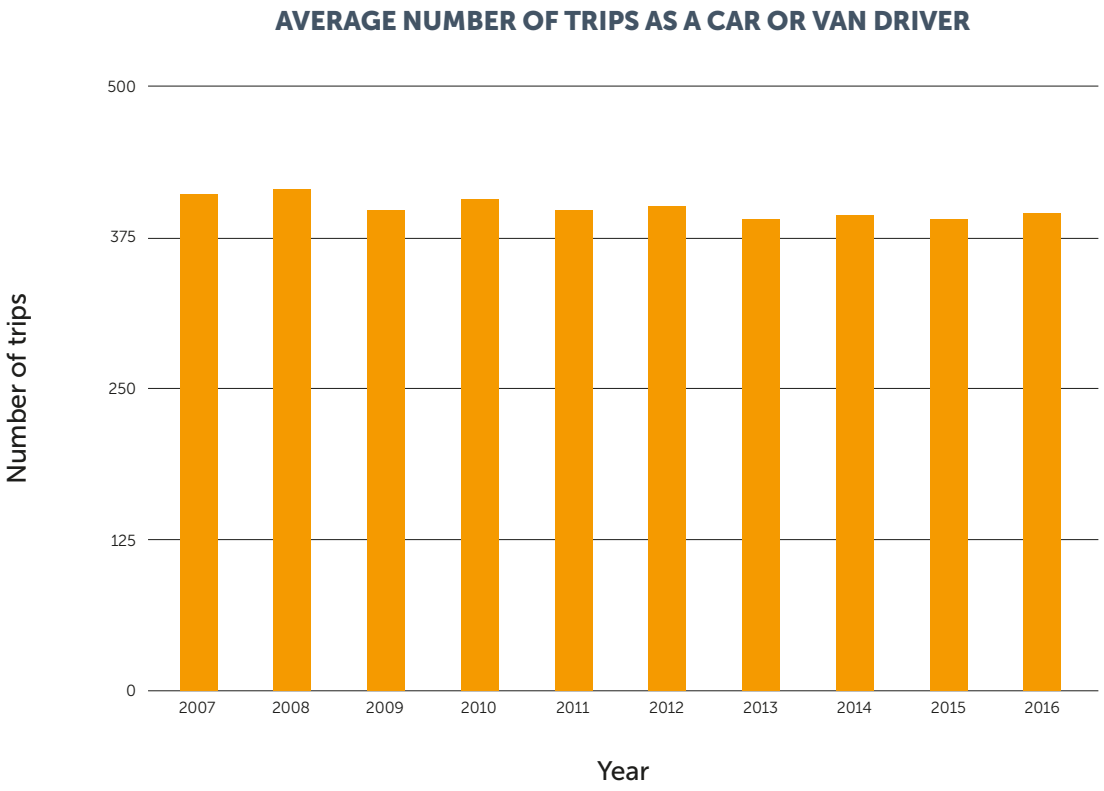
KEY TRENDS

Although there has been some recent decline nationally, more trips continue to be made in cars than by any other means – although in cities the car can be much less dominant, particularly in London and at peak times elsewhere.

Take up of driving licences is declining among young people whilst increasing among older people (particularly women).

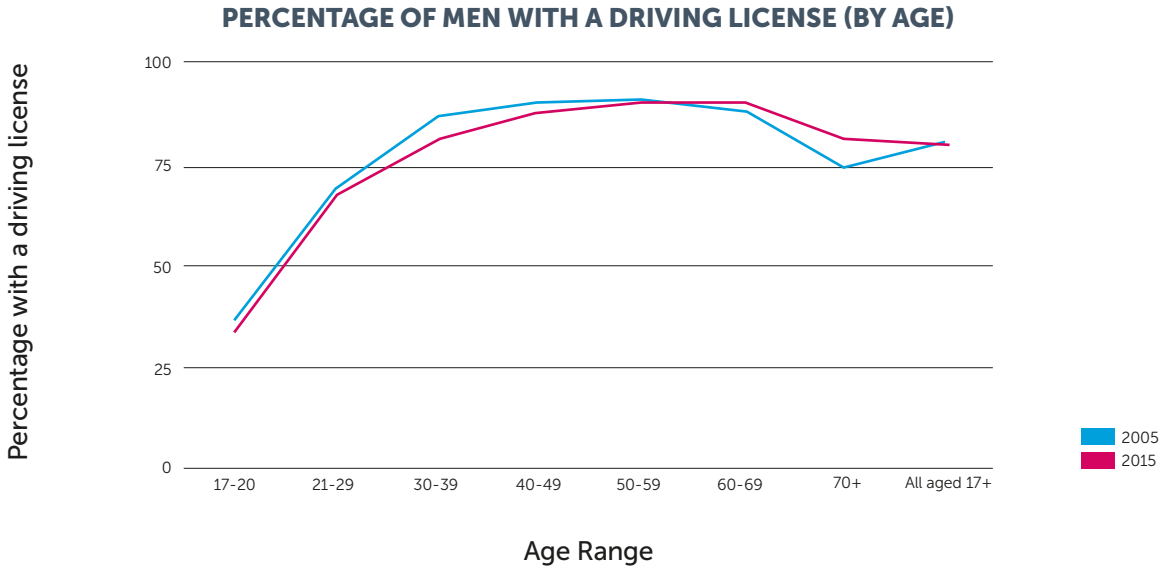
There has been a 23% increase in van traffic since 2006.

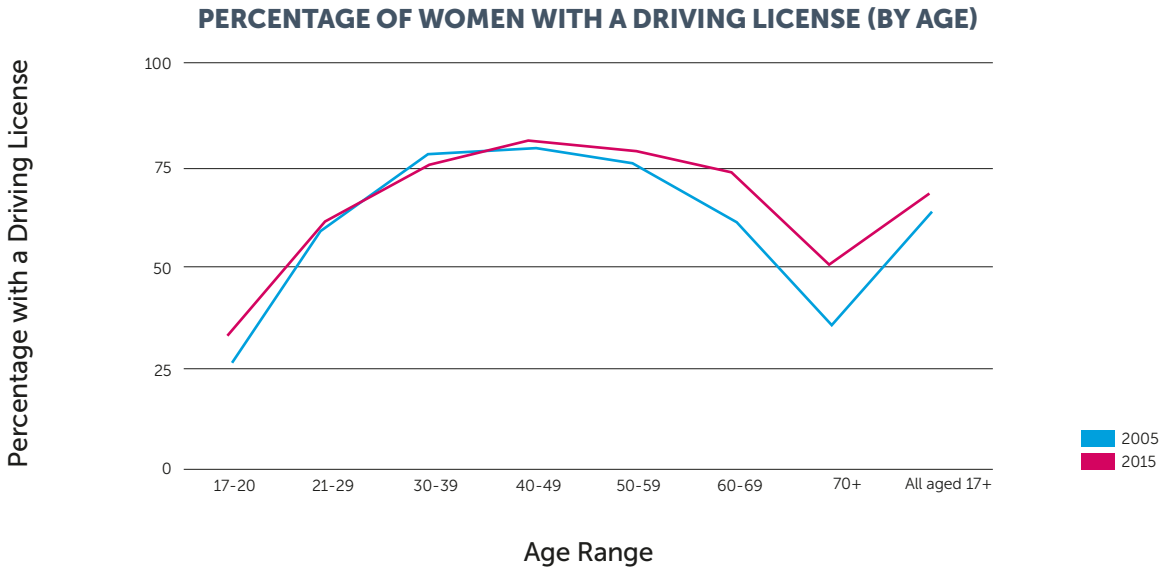
24. National Travel Survey Table NTS0303
25. National Travel Survey Table NTS0201
26. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/673176/young-peoples-travel-whats-changed.pdf
26. RAC Foundation, 2017, The implications of internet shopping growth on the van fleet and traffic activity, https://www.racfoundation.org/wp-content/uploads/2017/11/The_Implications_of_Internet_Shopping_Growth_on_the_Van_Fleet_and_Traffic_Activity_Braithwaite_May_17.pdf



The National Travel Survey groups van and car drivers and passengers together given that vans are not always used for freight. However, other data sets show that van traffic is also increasing in and of itself – with 23% growth since 2006[27]. There has also been strong growth in urban areas. Research by the RAC Foundation estimates that by 2040 vans will account for 21% of all mileage nationally and 23% in London, compared to 14% and 15% respectively in 2010[28]. At the same time there is a lack of data around what is in these vans, and for what purpose van trips are being made.

27. DfT Road Traffic Estimates 2016 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/611304/annual-road-traffic-estimates-2016.pdf
28. RAC Foundation, 2017, The implications of internet shopping growth on the van fleet and traffic activity, https://www.racfoundation.org/wp-content/uploads/2017/11/The_Implications_of_Internet_Shopping_Growth_on_the_Van_Fleet_and_Traffic_Activity_Braithwaite_May_17.pdf


PERCENTAGE OF MEN WITH A DRIVING LICENSE (BY AGE)
Percentage with a driving license
100
75
50
25
0
17-20
21-29
30-39
40-49
50-59
60-69
70+
All aged 17+
Age Range
2005
2015


PERCENTAGE OF WOMEN WITH A DRIVING LICENSE (BY AGE)
Percentage with a Driving License
100
75
50
25
0
17-20
21-29
30-39
40-49
50-59
60-69
70+
All aged 17+
Age Range
2005
2015

ANALYSIS

There is clear evidence of a move away from car use in cities where it becomes more difficult or expensive to drive whilst at the same time quality alternatives are made available.

The implications of divergent trends in car use amongst young and old are one of the issues that UTG will be exploring in the coming year.

Our forthcoming report on 'white van cities' examines the available evidence on the factors behind the growth in van traffic, setting out the gaps in that evidence base as well as the issues and options for urban transport authorities on responding to the growth in van traffic.

TAXI TRENDS

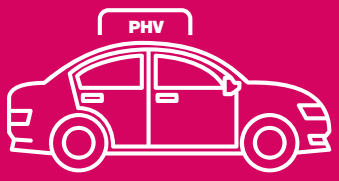
THE TAXI AND PRIVATE HIRE VEHICLE (PHV) MARKET HAS SEEN HUGE CHANGE OVER THE LAST FEW YEARS WITH NEW ENTRANTS TO THE MARKET, SUCH AS UBER, CHANGING THE FACE OF THE INDUSTRY

There has been significant growth in the number of PHVs over the past decade across the city regions. Taxi numbers have also seen growth (but at a much slower rate) other than in London where taxi numbers have fallen.

There are many more PHVs per head of population in the city regions than taxis. 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 one per 100 people in London.

The change in the balance of provision between taxis and PHVs over the last decade in the city regions is most marked in London where PHVs numbers have increased dramatically whilst taxi numbers have declined.

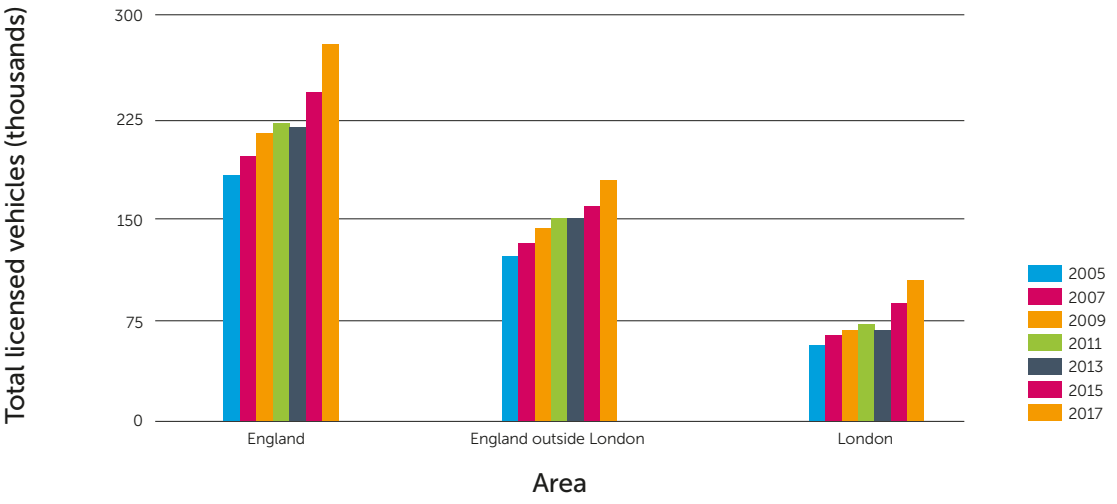
KEY TRENDS



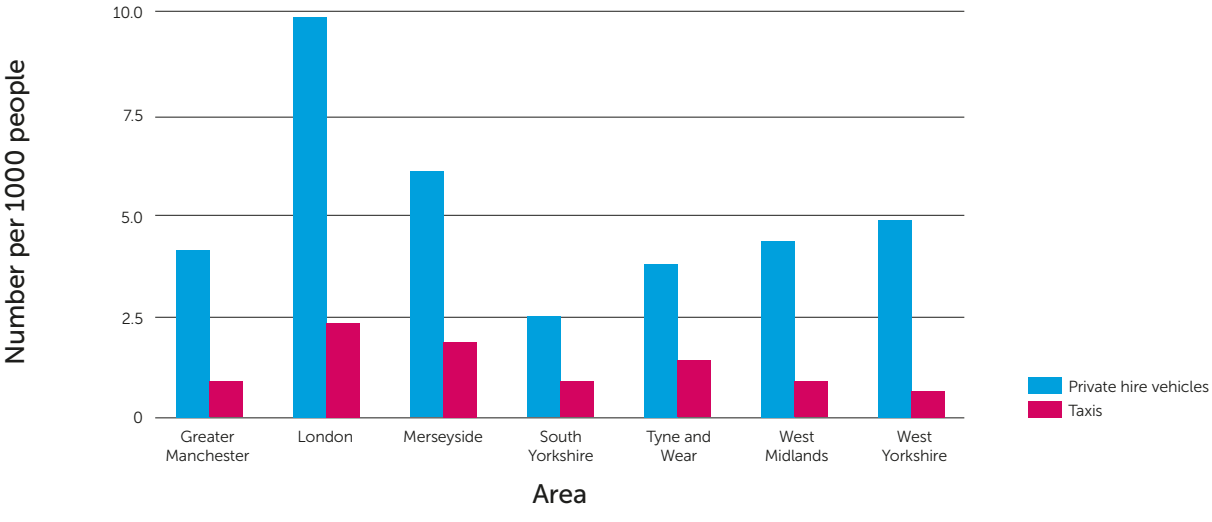
Nationally Private Hire Vehicle numbers have soared by 41% between 2007 and 2017 whilst taxis have grown by 17%.

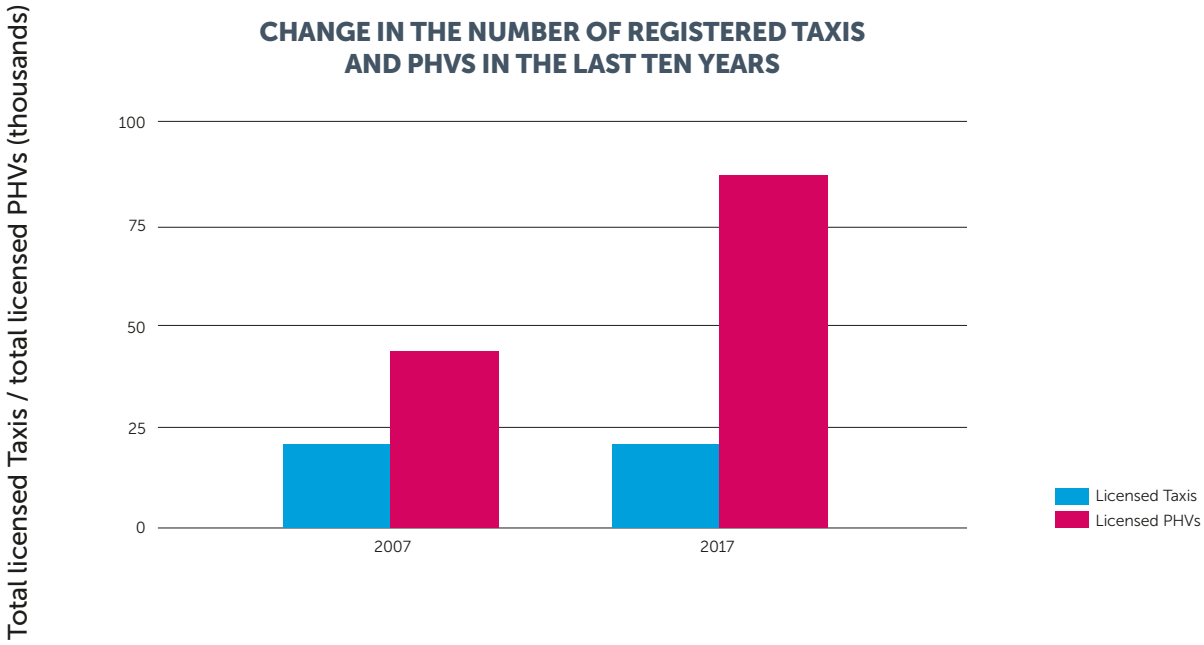
The number of taxis in London has decreased over the last ten years, whilst the number of Private Hire Vehicles has increased by almost 100%. London now has one PHV for every 100 people.

TOTAL LICENSED VEHICLES BY AREA (TAXIS AND PHVS)



NUMBER OF TAXIS AND PHVS PER 1000 PEOPLE BY AREA





ANALYSIS

The taxi and PHV sectors are being transformed by new technology and business models. The growth in the sector 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.

UTG explored these issues in its recent report, **Taxi! Issues and options for city region taxi and private hire vehicle policy**, 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 the balance between benefits for consumers and the wider issues set out above.

ACTIVE TRAVEL TRENDS

WALKING REMAINS THE SECOND MOST PREVALENT FORM OF TRAVEL NATIONALLY, WITH 243 TRIPS PER HEAD, ONLY BEHIND TRIPS MADE AS A CAR OR VAN DRIVER

National statistics show a recent increase in walking trips (up 22% since 2015)[29] This partly reflects a change in methodology to correct for previous under reporting of some walking trips. The longer term trend has been one of decline in walking trips. In 1975/6 walking accounted for 47% of all trips[30], however, by 2016 this had fallen to 25% of all trips in England.

Cycle trips per head remain low and fluctuate from year to year within a narrow band of numbers of trips. In 2016 the number of trips per head nationally was 15. These low numbers resonate with the low levels of satisfaction with provision for cycling in the National Travel Survey. Only 27% of people are either very or fairly satisfied with cycling and walking facilities, compared to 43% for local roads, 53% for trains and 73% for walking[31].

However, behind the national averages there is evidence to show that where there has been significant investment in active travel in the city regions this has led to a significant growth in cycle trips. In particular, London has reported a growth of 50% in cycling trips between 2005 and 2014[32].

Cycling's mode share can be much higher in comparable European countries and cities. In the Netherlands, 26% of all trips are by bike, with higher levels in Dutch cities, whilst in Copenhagen 35% of trips are by bike[33].

Nationally the average trip distance has increased for cycling from 2.9 to 3.6 miles, whilst walking has remained constant at one mile. This means that in 2016, the average person walked 293 miles and cycled 53 miles.

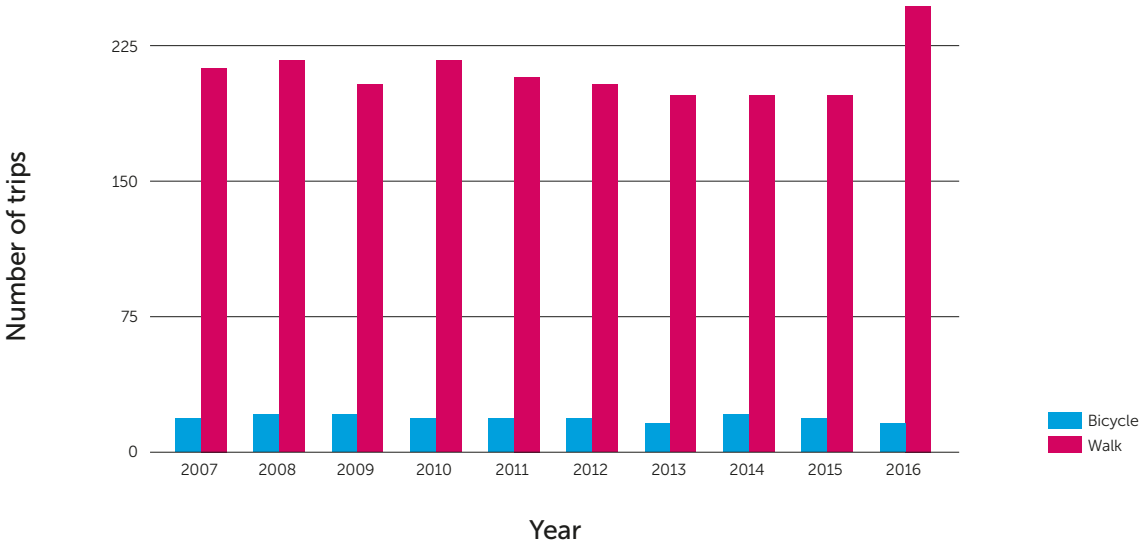
KEY TRENDS

Walking is the second most prevelent form of travel – though the number of walking trips is declining.

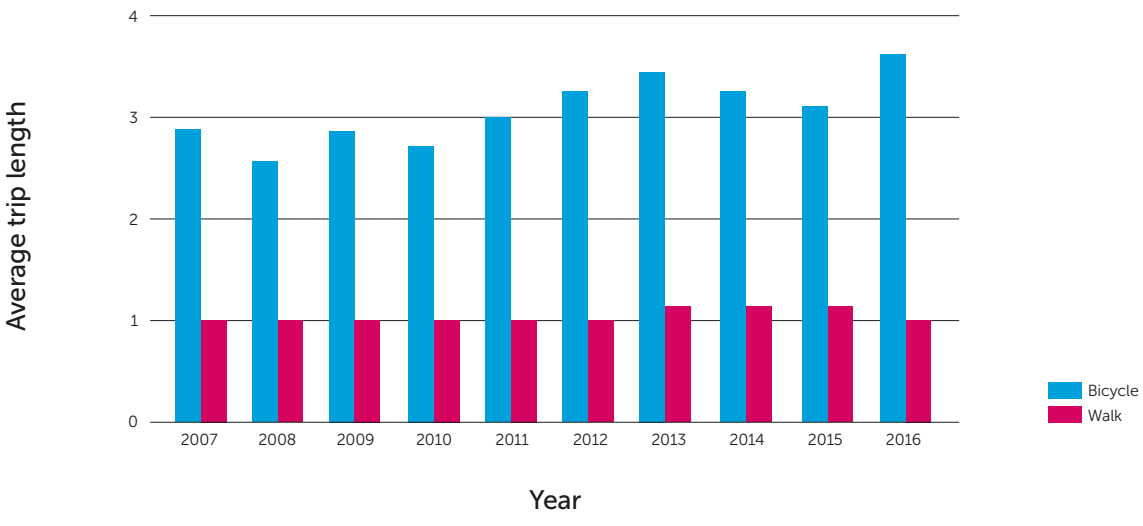
Where there has been significant investment in urban cycling, there has been high levels of growth, in particular 50% growth in London in the last decade.

29. However this partly reflects a change in methodology to correct for previous under reporting of some walking trips
30. Hass-Klau, 2015, The Pedestrian and the City
31. National Travel Survey
32. https://www.theguardian.com/uk-news/davehillblog/2016/sep/21/how-many-londoners-are-switching-from-public-transport-to-bicycles. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/674568/analysis-from-the-national-travel-survey.pdf
32. Urban Transport Group, 2017, The Scandinavian Way to Better Public Transport http://www.urbantransportgroup.org/resources/types/reports/scandinavian-way-better-public-transport

AVERAGE NUMBER OF WALKING AND CYCLING TRIPS PER PERSON



AVERAGE TRIP LENGTH BY MODE (MILES)



ANALYSIS

Active travel (cycling and walking) is good for public health and good for cities too as making trips on foot or by bike rather than by car makes more efficient use of available street and road space. Although the Government has said it wants to see a doubling of cycling trips and to halt the decline in walking trips between 2017 and 2025, the national statistics make for grim reading with walking in decline and levels of cycle use consistently low.

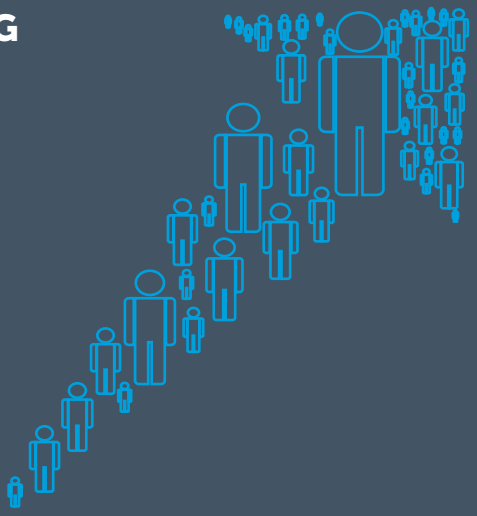
Having said that, local counts suggest that where there is investment in cycling infrastructure, it is well used and, as London shows, over time can deliver increases.

The question is whether the current levels of investment in active travel will be sufficient to turn the national statistics around.

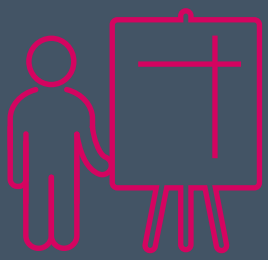
UTG runs an active travel group which brings together lead officers at both the district and city region level to share expertise and learn from each other on the best approaches to promoting active travel. We have also made the case for the economic benefits of investing in active travel in **'The Case for Active Travel.'**

CONCLUSIONS: NINE KEY TRENDS

CITY REGION POPULATIONS ARE GROWING AND ARE FORECAST TO GROW FASTER THAN THE REST OF ENGLAND. THIS WILL PUT ADDITIONAL STRAIN ON BOTH HOUSING AND TRANSPORT NETWORKS. TRANSPORT INVESTMENT CAN ADDRESS BOTH THESE CHALLENGES THROUGH PROVIDING ADDITIONAL TRANSPORT CAPACITY WHICH CAN ALSO OPEN UP NEW HOUSING OPPORTUNITIES.



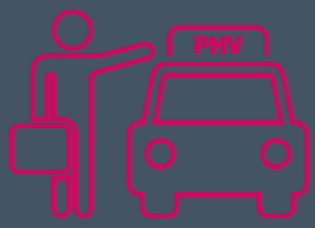
Although in decline, nationally more trips per head continue to be made by car than by other modes. However in cities, particularly London and elsewhere at peak times, the car has become much less dominant. Take up of driving licences is declining amongst the young and increasing among the old (particularly women).



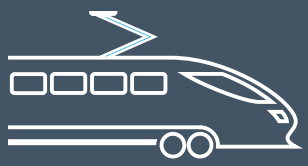
The case for **coordinated and integrated transport planning** in urban areas is stronger than ever given the ramifications of differential growth and decline in different modes, as well as the implications of transformative social and technological change. All of these have knock on implications for a host of transport and wider urban public policy goals including integration, social inclusion, congestion and air quality.

City region economies are all growing – but differentially. London has a stronger economy than the other city regions and within those city regions, core cities are performing better than the wider sub regions. Transport investment can help sustain and support a more balanced realisation of the full potential of city region economies.

The forecasted shift to an **older demographic** for urban populations is perhaps one of the biggest under researched and considered background factors in transport policy and planning.



Nationally **people are travelling less** overall, including for commuting and shopping. These trends are also reflected in cities. There are also clear signs that transformative social and technological change is beginning to make significant impacts on travel patterns as can be seen in runaway growth in Private Hire Vehicle numbers and in the recent softening of travel demand in London.

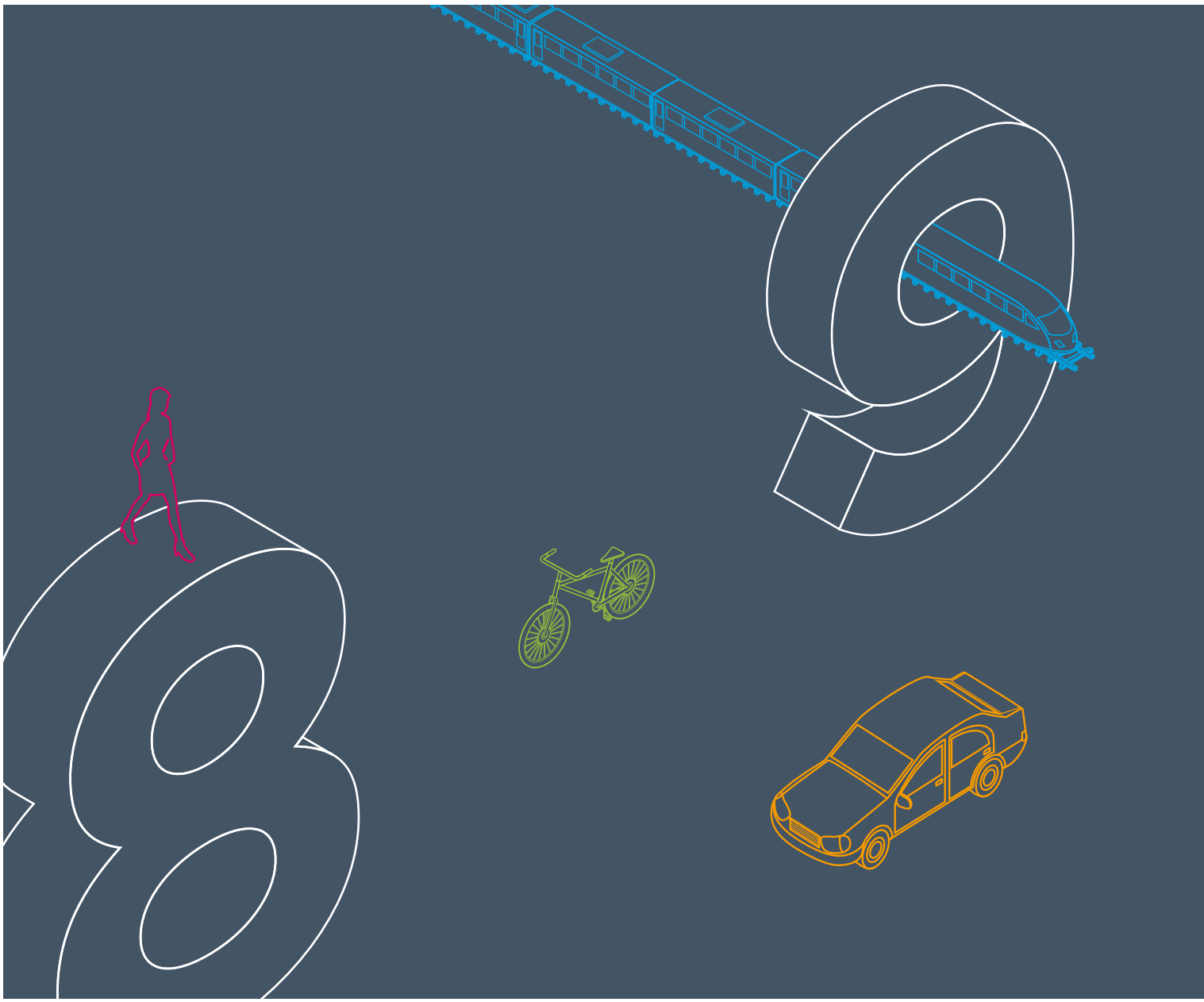


In terms of **patronage by mode**, over the last decade the big loser has been the bus and the big winners have been trains and Private Hire Vehicles. By and large mass transit systems, modern trams and light rail systems have also expanded and put on patronage.

Where **steel wheel systems** successfully play to their strengths, growth has been remarkable.

The **national picture on active travel is depressing** with low levels of cycling and declining walking trips. However there are clear signs that where there has been sustained investment in urban cycling then growth follows (if you build it they will come).

URBAN TRANSPORT GROUP



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