

**Report to:** Transport Committee

**Date:** 8 November 2019

**Subject:** **Urban Transport Group Research – Number Crunch 2019**

**Director:** Alan Reiss, Director of Policy, Strategy and Communications,

**Author(s):** Steve Heckley, Roseanna Brett-Davis

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	

## 1 Purpose of this report

- 1.1 To provide a summary of recently published research by the Urban Transport Group in respect of transport trends and challenges faced by UK city regions.
- 1.2 To inform Transport Committee of work to produce an Annual Performance Monitoring Report for the West Yorkshire Transport Strategy 2040.

## 2 Information

### Background

- 2.1 The Urban Transport Group (UTG) is the UK network of urban transport authorities consisting of Merseytravel, Nexus, South Yorkshire PTE, Transport for Greater Manchester, Transport for London, Transport for the West Midlands and the West Yorkshire Combined Authority, plus associate members. UTG represents and supports the work of its members through:
  - Providing thought leadership for the urban transport sector - by undertaking research and producing reports that investigate the transport challenges its members face;
  - Making the case for the funding and powers its members need to plan and deliver transport networks to support inclusive, sustainable growth;

- Providing professional networks for the take up of best practice through sharing experience and co-commissioning.
- 2.2 In 2018 UTG started producing an annual report of national transport trend data. This paper summarises findings from UTG's June 2019 publication of their 'Number Crunch 2019: Urban transport trends in changing times' report. The 'Number Crunch 2018' report was summarised for the Transport Committee meeting of 25 May 2018.

### **Number crunch 2019: Urban transport trends in changing times**

- 2.3 The full Number Crunch 2019 report can be accessed from UTG's website at: <http://www.urbantransportgroup.org/resources/types/reports/number-crunch-2019-urban-transport-trends-changing-times>
- 2.4 Number Crunch reports identify and provide updates on some key travel and transport trends for the UK's largest city regions, reviewing data collected over a 10 year period from London and the Metropolitan areas of Greater Manchester, Merseyside, South Yorkshire, Tyne and Wear, West Midlands and West Yorkshire, encompassing a total population of 21 million people.
- 2.5 Number Crunch principally uses national data-sets, providing a high level summary of transport trends at a national and aggregate level across the city regions. National data is however augmented where possible and helpful by more local data. The 2019 report provides an updated overview of key trends from previously used data.
- 2.6 Number Crunch 2019 highlights key trends in:
- **City region economies continue to grow**, with London and West Midlands having the largest percentage growth. However, this economic growth is not uniform, with economic performance and rates of economic growth differing 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. The six core cities in the metropolitan areas analysed 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). For example, Leeds is ranked 31 in the list of Local Authorities which have the highest proportion of the most deprived places, as measured at the level of Lower Super Output Areas (LSOAs).
  - **Growing city region populations are increasing housing demand** - which has implications for the transport network. In the last decade there has been rapid growth in the numbers of people living in the city regions and this high level of growth is forecast to continue up to at least 2030. 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.

- **How and why people are travelling is changing** - including the decline in the traditional daily commute. There have been significant shifts in the reasons why people make trips, with the number of commuting, shopping and leisure trips in decline. Changes to working patterns and more home working have resulted in people commuting less often, which will have implications for public transport provision in general, and for ticketing for commuter travel, in particular.
- **Car travel still dominates, but rail travel, walking and cycling are all increasing.** Nationally the car continues to be the most used form of transport with an average of 390 trips per person per year, but different trends emerge in the largest urban centres where car use has begun to decline, with a rise in rail and active travel in some areas:
  - **Railway patronage is increasing** - regional rail (which includes most local services in the Metropolitan areas) has seen a significant increase in patronage hitting 389 million in 2017/18, an increase of 29% since 2008/09. In the Metropolitan areas, there has been growth of 25% overall, with strong growth highlighted in Greater Manchester (26%) and West Yorkshire (19%) since 2010/11;
  - **Active travel is increasing in the largest urban centres** - specifically where investment in infrastructure has occurred. The National Travel Survey shows that walking remains the second most prevalent form of travel nationally, with 317 trips per head per year. The national figures also show an increase in walking trips of 19% since 2015. Cycle trips per head remain low and fluctuate from year to year, but cordon count data from major urban centres in the city regions is picking up a shift to the bike, specifically in areas of infrastructure investment;
- **Bus service levels and usage is in decline**, although it remains the dominant mode of public transport in the Metropolitan areas. Patronage is in long term decline having fallen by 15% from 1.1 billion in 2009/10 to 908 million in 2017/18. 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. Additionally, bus vehicle miles have fallen significantly (18%) in Metropolitan areas in the last decade and this is noted in the report as a possible contributing factor to the decline in patronage;
- **The number of private hire vehicles (PHV) is still increasing** - although the pace has slowed. 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. Taxi numbers have also seen growth over the last decade, although more recently numbers have been in decline. There are many more PHVs per head of population in the city regions than taxis.

2.7 The report makes the case for strong, coordinated and integrated transport planning at the city region level supported by long term funding frameworks for

local urban transport, with investment priorities in switching more short journeys from the car to active travel, expanded rail networks to improve access to urban centres, and opening up more housing sites, as well as for measures to support bus services which are key to social cohesion.

- 2.8 UTG's report highlights West Yorkshire performance in respect of cycling, identifying significant growth in the number of cyclists in Leeds with a 52% increase in cyclist numbers between 2009 and 2017, higher than both Manchester (43%) and the City of London (37%) as reported by the National Travel Survey. In making a link to investment in good quality infrastructure the report highlights the opening of the Leeds Bradford cycle superhighway in June 2016, highlighting that 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. (More recent CityConnect data provided by Leeds shows a million trips reached).
- 2.9 Number Crunch flags implications for transport and wider urban public policy goals in the UK and within West Yorkshire, including planning for specific transport modes, social inclusion, productivity and congestion relief, environment, health and air quality. Number Crunch also flags the need for detailed understanding and exploration of transport and travel trends at the city region and local level. The report does not review in detail carbon and air quality implications of travel and transport trends.

### **West Yorkshire 'State of Transport' Annual Transport Monitoring Report**

- 2.10 The Transport Committee meeting of 16 March 2018 endorsed a set of indicators and targets, subsequently adopted by the Combined Authority at its meeting of 10 May 2018, to assess performance in delivering the Transport Strategy 2040 and to inform any changes to policy, strategy and investment priorities. The performance monitoring framework comprises of:
- **A set of five modal targets** - to grow the numbers of trips made by train (75%), bus (25%), cycling (300%) and walking (10%), and to reduce car trips (-3.5%) over a 10 year period to 2027. These were set as mid-term to targets to allow sufficient time to collect and understand trend data and assess the impacts and appropriateness of policies, strategies and investment programmes, with a view to making any necessary adjustments;
  - **A set of six key indicators for each core theme of the Strategy** - one key indicator with a target attached to illustrate each of the strategy's six core themes, also set for an initial 10 year period;
  - **A longer set of 32 supporting technical indicators** - to provide additional insight into performance.
- 2.11 This performance monitoring framework makes use of local and national data sets and collection methodologies used by the Combined Authority, the West Yorkshire partner councils, from partner agencies and government. This includes local market research and public satisfaction surveys to provide

insight into customer perceptions and experience of performance across a range of transport assets and modes.

- 2.12 The intention is to publish an annual West Yorkshire State of Transport report which will assess delivery of the Transport Strategy 2040 using the performance monitoring framework described in paragraph 2.11 above, and provide additional contextual and benchmarking data to help understand local performance. Not all the data is available at the same time and there can be a time lag in collecting data, but the intention is to produce and publish the annual report towards the end of each calendar year. The Annual Monitoring Report is intended as providing a public resource, but also crucially to provide insight for Members and officers to support future policy and investment decision making.
- 2.13 Work is underway to produce the West Yorkshire State of Transport Annual Monitoring Report 2019. The report is intended to broadly follow this structure:
- Achievements – Highlighting achievements in travel and transport in the year;
  - Transport at a glance - Summary infographics present key findings;
  - West Yorkshire Population & Economic Trends – Setting the wider context for transport and travel trends;
  - Performance Monitoring Framework of the Transport Strategy 2040;
    - Modal Trends – Progress towards the interim modal targets set in the Transport Strategy for car, walking, bus, rail and cycle trips;
    - Core Themes – Progress and trends against the targets of the six core themes of the Transport Strategy: Inclusive growth, Environment, Health & Well-being; The Road Network; Places to live and work; One System Public Transport; Smart Futures; and Asset Management And Resilience;
  - Benchmarking - Comparison against other Combined Authority areas;
  - Technical Appendix – The full technical data-sets from the Performance Monitoring Framework
- 2.14 The intention is to publish the Annual Monitoring Report 2019 in December 2019 or January 2020. A draft of the report will be available to share with Transport Committee Members in mid-November. To provide Members with an opportunity to review the data and provide input to its analysis and presentation it is proposed to hold a workshop in late November/early December with Transport Committee and District Transport Portfolio Holders.
- 2.15 The UTG Number Crunch report analysis broadly corroborates the analysis undertaken as part of the West Yorkshire Transport Strategy baselining in 2017/18 and the initial analysis of data collected for the 2019 Annual Monitoring Report, but this first year's data and implied trends will need to be treated with some caution at this early point in the Transport Strategy. There are a wide range of initiatives and interventions being developed and delivered that will take time to realise their impacts. The mid-term modal targets were deliberately chosen to illustrate the ambition of the Combined Authority and partner councils, with an understanding that a number of years of delivery and

impact data would be necessary to determine if the policies, strategies and investment programmes of the Transport Strategy are working, or if action is required to re-set targets and/or policy and strategy.

### **3 Financial implications**

3.1 None as a direct result of this report

### **4 Legal implications**

4.1 None as a direct result of this report

### **5 Staffing implications**

5.1 None as a direct result of this report

### **6 External consultees**

6.1 Officers from partner councils have been engaged in the development of the West Yorkshire State of Transport Annual Monitoring Report.

### **7 Recommendations**

7.1 That Transport Committee notes the content of the Urban Transport Group's reports on Transport trends in the City Regions 2019

7.2 That Transport Committee notes the work to produce a West Yorkshire State of Transport Annual Monitoring Report 2019.

7.3 That Transport Committee agrees to hold a workshop with District Transport Portfolio Holders to review performance data and provide input to the analysis and presentation of the West Yorkshire State of Transport Annual Monitoring Report 2019.

7.4 That Transport Committee delegate to the Chair of Transport Committee the decision to sign-off for publication the West Yorkshire State of Transport Annual Monitoring Report 2019.

### **8 Background documents**

8.1 Urban Transport Group report: Number crunch 2019: Urban transport trends in changing times. Accessed:  
<http://www.urbantransportgroup.org/system/files/general-docs/Number%20crunch%202019%20%E2%80%93%20Urban%20transport%20trends%20in%20changing%20times.pdf> .

### **9 Appendices**

None