

Report to: Transport Committee

Date: 25 May 2018

Subject: Urban Transport Group research

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Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input 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 challenges faced by UK city regions.

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.
- 2.2 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.
- 2.3 UTG's Business Plan for 2018/19, which sets out their research activities for this current financial year, was reported to the Transport Committee meeting of 16 March 2018.
- 2.4 This paper highlights the findings of two recently published reports identified in UTG's Business Plan of last year, 2017/18:
- Number Crunch: Transport trends in the City Regions;
 - White Van Cities: Questions, challenges and options on the growth of urban van traffic.

Number Crunch report

- 2.5 The Number Crunch report was published by UTG on 4 April 2018. The full report can be accessed from UTG's website at:
http://www.urbantransportgroup.org/system/files/general-docs/UTG_Number%20crunch%20transport%20trends%20in%20the%20city%20regions_digital.pdf
- 2.6 The report identifies some key travel and transport trends for the UK's largest city regions, reviewing data collected over the last 10 years from London and the six Metropolitan areas of Greater Manchester, Merseyside, South Yorkshire, Tyne and Wear, West Midlands and West Yorkshire.
- 2.7 UTG identify city regions as key to the UK economy, but warn that the scale, speed and nature by which city region economies and populations are changing presents challenges for transport networks in ensuring that growth can continue to be supported and maximised, and the benefits fairly spread. Some of the data sets used differ by time period and there have been changes in methodologies, but UTG are able to identify some key trends to illustrate the scale and nature of challenges facing city regions.
- 2.8 The key trends highlighted are:
- **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 their wider sub regions;
 - **City region populations are growing and are forecast to grow faster than the rest of England** - populations are predicted to grow by 19% across the city regions and by 12% in metropolitan areas by 2039, compared to 8% for England outside of the city regions;
 - **The population is aging** - most noticeably in the growth of the over 75's, with predicated growth of 80% from 1.3m to 2.4m for this age group in the city regions by 2039. UTG identify the shift to an older demographic for

urban populations as one of the least considered background factors in transport policy and planning;

- **People are travelling less overall, including for shopping, commuting and business** - this is a national trend that UTG suggest is also reflected in cities. There are also signs that transformative social and technological change is beginning to impact on travel patterns, evidenced by the growth in Private Hire Vehicle (PHV) numbers linked to new entrants to the market such as Uber. Nationally PHV numbers increased by 41% between 2007 and 2017, and Taxi numbers grew by 17%;
- **More trips per head continue to be made by car than by other modes** - but UTG suggest that nationally the trend for private car trips is in decline and the car is becoming less dominant in cities. Car use shows some interesting changes across age groups, with the take up of driving licences declining amongst the young but increasing among the old (particularly women). The National Travel Survey groups cars and vans together, but other data shows that van traffic has had the biggest growth, increasing by 23% since 2006;
- **Patronage by mode is changing** - the big loser has been the bus and the big winners have been trains and PHVs:
 - Bus patronage in metropolitan areas is in long-term decline, falling from 1.1 billion in 2009/10 to 937 billion in 2016/17, and the number of bus trips per head has also declined, suggesting it is only population increases stopping overall bus patronage from falling more steeply;
 - Rail use into city centres has significantly increased e.g. Leeds saw growth of 71% between 2006/07 and 2015/16, but growth has also happened away from core city stations e.g. Huddersfield saw rail use grow by 91% in the same period. Mass transit systems have also seen patronage grow rapidly with tram and light rail systems experiencing a 44% increase since 2007/08 following investment in new lines and better services;
- **Active travel shows low levels of cycling and declining walking trips at a national level** - but UTG find evidence of growth in cycle trips within city regions following investment in cycling. There is a long-term trend of declining walking trips, with walking making up 47% of all trips in England in 1975/76 and 26% by 2016;

2.9 UTG identify a continued, important role for coordinated and integrated transport planning in urban areas to address the consequences of differential growth and the decline in different modes, as well as the implications of transformative social and technological change. Investment in transport is flagged as vital to help sustain and support a more balanced realisation of the full potential of city region economies.

White Van Cities report

2.10 The White Van Cities report was published by UTG on 9 April 2018. The full report can be accessed from UTG's website at:

<http://www.urbantransportgroup.org/system/files/general-docs/White%20Van%20Cities.pdf> .

- 2.11 White Van Cities elaborates on the growth in van use identified in the Number Crunch report, setting out key trends and their potential causes, examines implications and highlights good practice from transport authorities on vans.
- 2.12 The Department of Transport (DfT) defines vans (or Light Goods Vehicles, LGVs) as goods vehicles below 3.5 tonnes in weight including their cargo. This includes small commercial vans and larger 'transit' and 'Luton' types. (Heavy Goods Vehicles or HGV's are vehicles over 3.5 tonnes).
- 2.13 Van use is the fastest growing sector of road traffic. There are 3.8 million vans registered in the UK representing 15% of all motor traffic. There has been greater recent growth in the use of larger vans, possibly related to their attraction over HGV's in being able to access urban/HGV restricted areas. Van mileage has increased across all road types. The DfT forecasts overall van mileage growth of 79% between 2010 and 2040.
- 2.14 Of all registered vans in 2016, 96% were diesel fuelled. Alternative fuelled, low emission vans are available but take up has been slow. 47% of vans are registered to a company and 51% are privately registered with 2% between owners. Journey purpose data is limited, but 2009 DfT data suggests:
 - 20% of mileage is related to carrying goods for collection or delivery - (although other more recent data suggests this percentage is increasing);
 - 50% of mileage is for carrying tools and equipment (e.g. plumbers).
- 2.15 The growth in van traffic is identified as being explained by
 - Rapid growth in e-commerce (- internet shopping and home deliveries);
 - The flexibility vans offer compared to HGVs, plus lighter regulations for vans compared to HGVs including less strict regulations on driver training, hours and roadworthiness for vans;
 - Changes to company car taxation and vehicle excise duty making vans a cheaper alternative and incentivising people to switch from cars;
 - Rises in the number of self-employed people.
- 2.16 UTG acknowledge the growth in van trips as having made an important contribution to economic success in supporting employment and assisting the logistics sector, but identify that van use presents challenges for cities and urban areas through its impacts on a number of key policy areas.
- 2.17 The report highlights key themes relating to the negative impacts of van use:
 - **Air Quality:** Van traffic contributes 30% of nitrogen dioxide (NO_x) emissions from road transport and significant percentages of airborne particulates (PM_{2.5} and PM₁₀);

- **Carbon emissions:** Van traffic contributes 16% of carbon dioxide (CO₂) emissions from road transport;
- **Congestion:** Cabinet Office research found that 50% of urban traffic increases experienced in the ten years up to 2008 were due to van traffic;
- **Urban realm:** Cities are seeking to improve urban realm and prioritise space for people over traffic but challenges exist around accommodating van access, drop-off and pick-up points, and noise, air pollution and intrusion impacts could become more acute in this context;
- **Safety:** Vans have a lower rate of accidents per mile than other road vehicles but there are issues related to illegal operation and the unsafe loading of vans.

2.18 The report identifies local authority best practice case studies in respect of mitigating the negative impacts of van use, including; Incentive schemes for businesses; Use and specification of Clean Air/Ultra Low Emission Zones; Traffic management access restrictions; Freight consolidation centres; and Inter-modal transfer including innovative, sustainable solutions for 'last-mile' city centre deliveries.

Implications of the two reports for the Combined Authority

- 2.19 The two UTG reports have potential implications for a range of transport and wider urban public policy goals including social inclusion, environment and carbon reduction, health and air quality and productivity and congestion relief.
- 2.20 The Number Crunch report uses national data-sets and as such provides an informative high level summary of transport trends at a national and aggregate level across the city regions. (It was not UTG's purpose to compare or explain different trends or nuances in individual cities/regions).
- 2.21 The Number Crunch report broadly corroborates evidence collected for the West Yorkshire Transport Strategy 2040, which is as expected as both UTG's report and the Combined Authority's work to develop indicators and targets for the Transport Strategy share some data-sets such as the DfT's National Travel Survey (NTS).
- 2.22 The decline in bus use nationally and across the city regions mirrors the West Yorkshire trend, although the average number of bus trips made by West Yorkshire residents is higher than the national average. The trend nevertheless highlights the ambition and challenge of the target adopted in the West Yorkshire Bus Strategy to grow bus trips in West Yorkshire by 25% by 2027, and Leeds City Council's own target to double bus patronage over the next 10 years, and the scale of investment required to reverse the decline.
- 2.23 UTG's description of the trend with cycling is consistent with West Yorkshire's experience, with generally low numbers of cycle trips with year on year fluctuations, but encouraging evidence behind the national and city region averages shows that where investment has been made in cycling infrastructure there has been increases in cycle trips. This is reflected in the

CityConnect programme's delivery of the Leeds-Bradford cycle superhighway. Since its July 2016 opening, the superhighway has recorded over half a million cycle trips, with an average of 3,000 users each month. Early monitoring results shows an increase in uptake in cycling across the route.

- 2.24 UTG's identified trend of a decline in walking trips is not fully supported by NTS data for West Yorkshire. There has also been long term decline in West Yorkshire but a broadly steady position of walked trips since 2011. The NTS methodology for recording walking trips was modified for 2016 and is anticipated to be modified again, but walking trips are difficult to measure and are not best represented by a single source of data. Understanding will be helped by reference to a wider set of national and local data to identify trends and opportunities for increasing the role of walking.
- 2.25 Of particular interest are the trends that UTG highlight in an overall decline in people making trips and a decline in the number of trips made per person by private car. UTG link the overall decrease in demand for travel to increasing trends for home-working and internet shopping. UTG link the reduction in the number of trips made by private car to car use becoming more difficult and more expensive in cities, at the same time that quality alternatives are made available. This interpretation is supported by a national trend of increasing rail use, and of tram and light rail systems in the city regions where they exist, for trips into centres. West Yorkshire has seen significant growth in rail trips but it does not have the benefit of other fixed systems.
- 2.26 The UTG identified trends of declining overall numbers of trips, and trips by private car look at first hand to differ from West Yorkshire experience. The average number of trips per person by all modes in West Yorkshire is above the national average and has remained fairly stable over a number of years with an increase of just 1% between 2004 and 2016. Over the same period the average trip rate in England decreased by 7%. The recent West Yorkshire trend for car trips was of steady growth from 2006 to 2011, interrupted by a dip in numbers from 2012 to 2015 which has been assumed to relate to the recession of the late 2000's and its continuing effects, before a sharp increase in car trips in 2016 to above pre-recession levels. It may be that the dip in car trips is less a consequence of the recession and more reflective of broader societal shifts and technological changes. Analysing further years data will help to understand if the 2016 data was part of a longer term upwards trend or a 'blip', and to better understand the relationships between car use and economic performance.
- 2.27 The Transport Committee meeting of 16 March 2018 endorsed a set of indicators (then adopted by the Combined Authority at its 10 May 2018 meeting) to assess performance in delivering the Transport Strategy including ambitious targets to grow the numbers of trips made by bus, train, cycling and walking and to reduce car trips. UTG's Number Crunch report will be updated on an annual basis which will assist in benchmarking West Yorkshire performance as reflected in Transport Strategy indicators and targets, against national and city/regional trends.

- 2.28 UTG's White Van Cities provides insight to an emerging, significant area of transport use, and suggests that targeted interventions addressing the role of LGV's could form a key theme of Transport Strategy delivery. The report's case study examples could have practical application in West Yorkshire to address traffic congestion and the requirements for action to reduce carbon emissions and improve air quality that are detailed in the separate Item 9 Air Quality update report to this meeting. There may be opportunities to use new technologies and data to better manage the transporting of goods and make better use of vehicles, road space and the public realm, that could be aligned with the Combined Authority's work to develop Mobility as a Service (Maas) offers for individuals identified in the Item 12 report to this meeting.
- 2.29 UTG acknowledge that data on van usage is limited and the need to gain a better understanding of how and why van traffic is growing to better inform policy makers to develop responses. UTG identify some key research questions that they propose to investigate. The Combined Authority will also need to develop its understanding of the local make-up and operations of the White Van fleet in West Yorkshire.
- 2.30 The findings of the two UTG reports emphasise the need for a programme of monitoring, evaluation and research within West Yorkshire to understand travel and transport trends and inform policy making. The Combined Authority has previously agreed funding allocations for the monitoring and evaluation of transport interventions and research projects from Local Transport Plan Integrated Transport block (ITB) funding. Current funding allocations expire at 31 March 2019. Work has now commenced to develop the detail of the capital programme for the three year period from April 2019 to March 2022. Reports on the development of that programme will be made to future meetings of the Transport Committee.
- 2.31 A key area highlighted in the Number Crunch report that might be a focus for research by both UTG and the Combined Authority is the differing trends in respect of younger and older people's attitudes to motoring. A better understanding of the reasons behind the trends for different age groups could inform the development of targeted interventions to improve connectivity, whether infrastructure provision or public transport retail strategy and products and/or the MaaS platforms identified in the Item 12 report to this meeting.
- 2.32 The UTG reports also raise interesting questions about understandings of travel demand and the ability to accurately project longer term futures. These questions form a central theme of a report titled 'All Change? The future of travel demand and the implications for policy and planning' published in May 2018 by the independent research group 'The Commission on Travel Demand', and produced with the input of the Institute for Transport Studies at the University of Leeds. This report suggests that the nature of the 'transport problem' is changing and highlights some of the same unexpected trends in travel and transport highlighted in the UTG reports, which the Commission argues challenge some of the tools used and assumptions embedded in growth forecasts which underpin transport investment decision making. A

report on The Commission on Travel Demand findings will be brought to a future meeting of the Transport Committee.

- 3.33 The trends and issues raised by these particular pieces of research suggest an opportunity to engage politicians early in the process of interpreting research data and determining uses and next steps in policy making.

3 Financial Implications

- 3.1 None as a result of this report

4 Legal Implications

- 4.1 None as a result of this report

5 Staffing Implications

- 5.1 None as a result of this report

6 External Consultees

- 6.1 None.

7 Recommendations

- 7.1 That the Transport Committee notes the content of the Urban Transport Group's reports on Transport trends in the City Regions and White Van Cities.

8 Background Documents

Urban Transport Group report: Number Crunch: Transport trends in the City Regions (2018). Accessed at:

http://www.urbantransportgroup.org/system/files/general-docs/UTG_Number%20crunch%20transport%20trends%20in%20the%20city%20regions_digital.pdf

Urban Transport Group report: White Van Cities: Questions, challenges and options on the growth of urban van traffic (2018). Accessed at:

<http://www.urbantransportgroup.org/system/files/general-docs/White%20Van%20Cities.pdf>

The Commission on Travel Demand report: 'All Change? The future of travel demand and the implications for policy and planning'. Accessed at:

http://www.demand.ac.uk/wp-content/uploads/2018/04/FutureTravel_report_final.pdf

10 Appendices

None