

Urban Transport Group – Supplementary written evidence (TTS0064)

I've attached our weekly travel trends log. This explores transport usage by mode through the duration of the pandemic at a national level as well as the most recent figures for our member areas. It is important to note that not all of the local figures are directly comparable, but give an idea of what is going on (for example WYCA's data only consists of concessions and multi-operator season tickets, so is justifiably lower than other areas in this data set).

It is important to note that bus patronage was already falling before Covid, so two years on we would expect the baseline to be lower (so a recovery to 92-95% of pre-Covid patronage would probably count as a full recovery to take into account the long term trend).

During Covid-19 patronage levels were very low. With fear of the virus and messaging about the dangers of using public transport some segments have been slower to return than others – for example concessionary travel is generally around 60% of pre-Covid levels in our member areas compared to commercial tickets recovering to around 80-85%. If this remains it will act to limit the overall recovery.

We are currently at a state where patronage levels for bus have recovered to the same level as before Plan B being implemented in December, but are yet to go above this in many places. Rail travel has seen a strong recovery this year, likely relating to the stronger return to the office following the removal of Covid-19 restrictions.

We are at an uncertain stage as to what will happen going forwards, which is likely to be influenced by the virus (how does it evolve, how many peaks do we have a year, how severe are any new strains, how successful are vaccines), but also wider socio-economic factors including changes in behaviour (such as working from home and online shopping), but also the high levels of inflation and high fuel costs which could act to limit discretionary spending and in particular leisure trips). I have attached a log we produced looking at the possible implications of increasing costs of living.

May 2022



What's happening on travel trends - 29/04/2022

Introduction

This log sets out some of the key sources of travel data and sets out some of the key trends.

Department for transport

The Department for Transport (DfT) is currently publishing daily movement data by mode. The full data source is available at the following link:

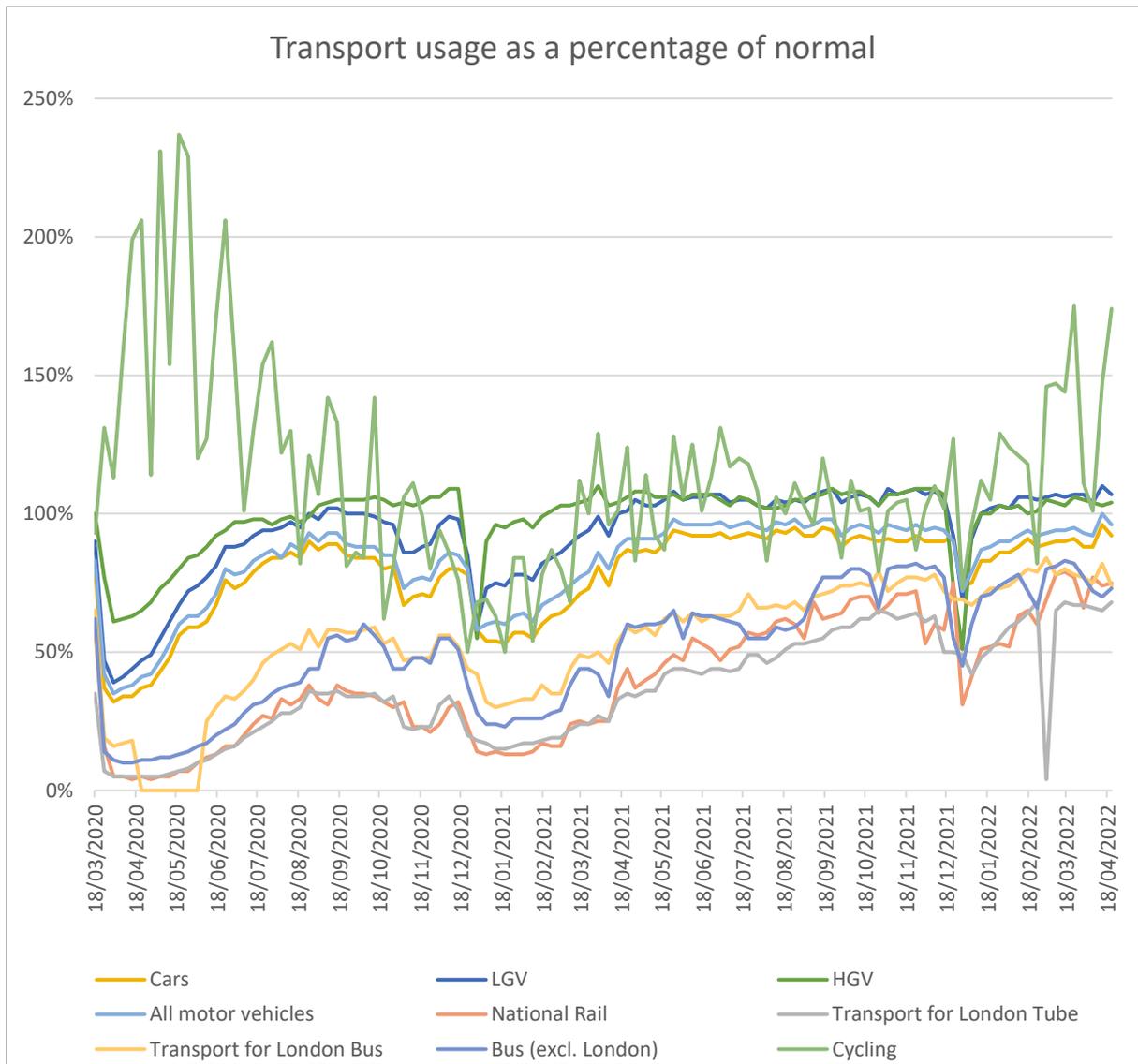
<https://www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic>

These statistics go back to the 1st of March and provide information on how current travel patterns compare to the pre-Covid rates.

We have collected a snapshot of how trends have changed below, presenting the data for each Wednesday.

The key trends are:

- Bus travel has steadily grown back to 82% of pre-pandemic levels. Levels have dropped back in the last couple of weeks due to the Easter Holiday's.
- Nationally, car travel has reached 92% of pre-Covid levels, with a significant increase in traffic during the Easter holiday's.
- Light rail networks continue to be at variable levels of patronage, largely shaped by local factors.
- Rail travel has seen strong growth through March having reached 75% of pre-pandemic levels.
- Cycling remains the only mode to be consistently above pre-pandemic levels.



Date	Cars	LGV	HGV	All motor vehicles	National Rail	Transport for London Tube	Transport for London Bus	Bus (excl. London)	Cycling
24/03/2022	91%	107%	106%	95%	77%	67%	78%	82%	175%
31/03/2022	88%	107%	105%	93%	66%	67%	77%	77%	111%
07/04/2022	88%	104%	104%	92%	77%	66%	75%	72%	101%
14/04/2022	96%	110%	103%	100%	74%	65%	82%	70%	147%
21/04/2022	92%	107%	104%	96%	75%	68%	74%	73%	174%

Data from our members

Below is a summary of patronage data compared with last year (ie pre-COVID) and last week.

Please note that the figures are not always strictly comparable given that members can derive their statistics on different basis. The footnotes set out how the figures have been arrived at for each area but in general:

- The bus patronage figures provided by our members can be full patronage or smartcard patronage and they can be either a weekly average or for a specific day
- Light Rail data is all full patronage and for a weekly average.
- Rail data consists of station footfall from either one or a small number of core stations within the region.

Patronage as a percentage of pre-Covid/weekly change – please note that Easter Holiday’s are impacting on patronage levels

Member	Bus (% of pre-COVID)	Weekly change	Light Rail (% of pre-COVID)	Weekly change	Local Rail (% of pre-COVID)	Weekly change
NEXUS ¹	NA	NA	89	+5	NA	NA
Merseytravel ²	NA	NA	NA	NA	NA	NA
SYPTÉ ³	73	+14	71	+19	NA	NA
TfL ⁴	79	+1	68	0	70	+1
TfGM ⁵	70	+6	64	-1	78	-3
TfWM ⁶	84	+9	NA	NA	35	-8
WYCA ⁷	50	+3	NA	NA	69	+1

NA = not applicable

footnote	What is the data
1	Light rail figures are a weekly average (W/C 17/04). Bus figures are for early January
2	Figures are a weekly average of smart card transactions compared to the first week of March. Rail data is for gated stations. Latest week ending 20/03
3	Bus patronage is for the main bus operators. Rail patronage is taken from a sample on Northern Rail only. Data to 27/04.
4	Figures are daily entries and exits, with the figure presented from the most recent Tuesday. Tube patronage presented in Light rail column. Data for 28/04

5	Weekly commercial bus patronage, actual Metrolink patronage, and Piccadilly footfall. Figures are for W/E 24/04
6	Data is for Swift Card journeys. Rail Data is taken from 5 key stations. Data for 20/04
7	Bus is a weekly average of smart card transactions. Rail is average weekly footfall at Leeds Station. Data from W/C 26/04.

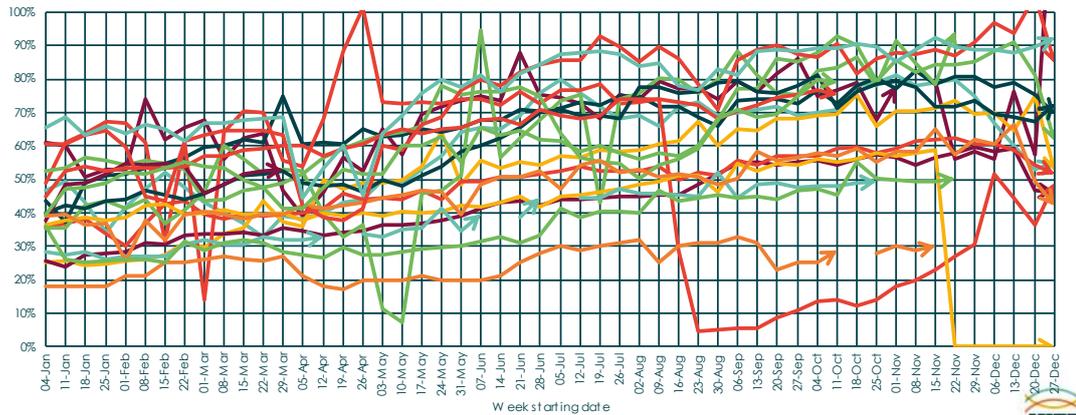
UITP

UITP is producing a patronage log for bus and metro systems across its membership. The full document can be accessed using the link below

[UITP ridership update | URBAN TRANSPORT GROUP](#)

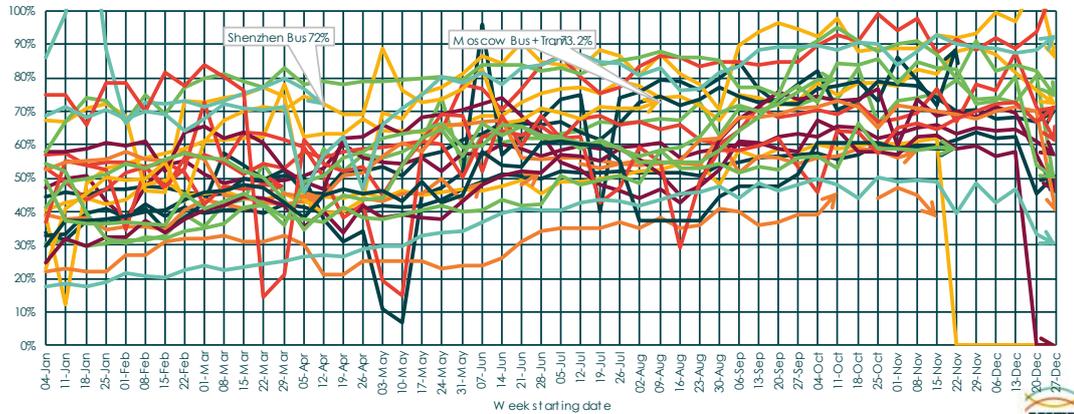
MULTI-CITY COMPARISON - MULTIMODAL

Weekly evolution since the start of January 2022 Multimodal ridership



MULTI-CITY COMPARISON – BUSES AND TRAMS

Weekly evolution since the start of January 2020 Buses and Trams



The graph allows you to only see some of the lines if you so wish. From the 'Chart tools' above, click on 'Select data to only some of the lines.'



Google

Google is providing Community Mobility reports, which can be downloaded from the following link:

<https://www.google.com/covid19/mobility/>

These provide a range of statistics for the national level as well as major districts. Information is provided on the level of travel to retail and recreation, supermarket and pharmacy, parks, public transport, workplaces, and residential. Trip levels are recorded against a baseline which was taken from earlier this year.

Data is taken from the location history for people with a google account.

Apple

Apple are providing a Mobility Trends Report, which can be accessed at the following link:

<https://www.apple.com/covid19/mobility>

This provides information on the changes in walking, driving and transit levels.

The data is generated by counting the number of requests made to Apple Maps for directions in the selected countries, regions and cities. Whilst providing an idea of the level of interest in specific trips, it should be noted that a request into a maps system does not always represent a direct link to a journey made (some people may look for interest or make multiple requests when planning a single journey).

Energy costs, inflation and public transport

An issues log

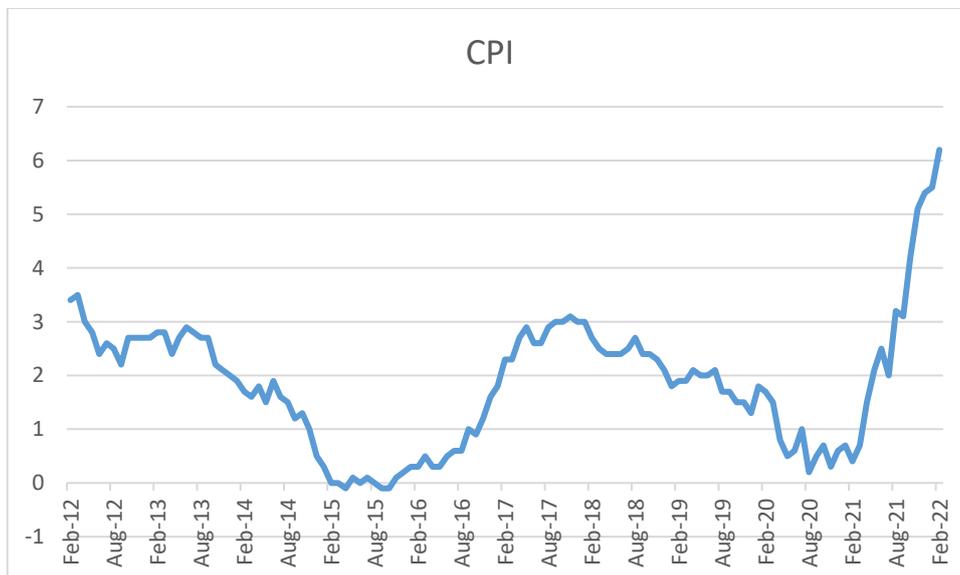
Introduction

The UK is currently experiencing high levels of inflation, which is predicted to last through much of this year.

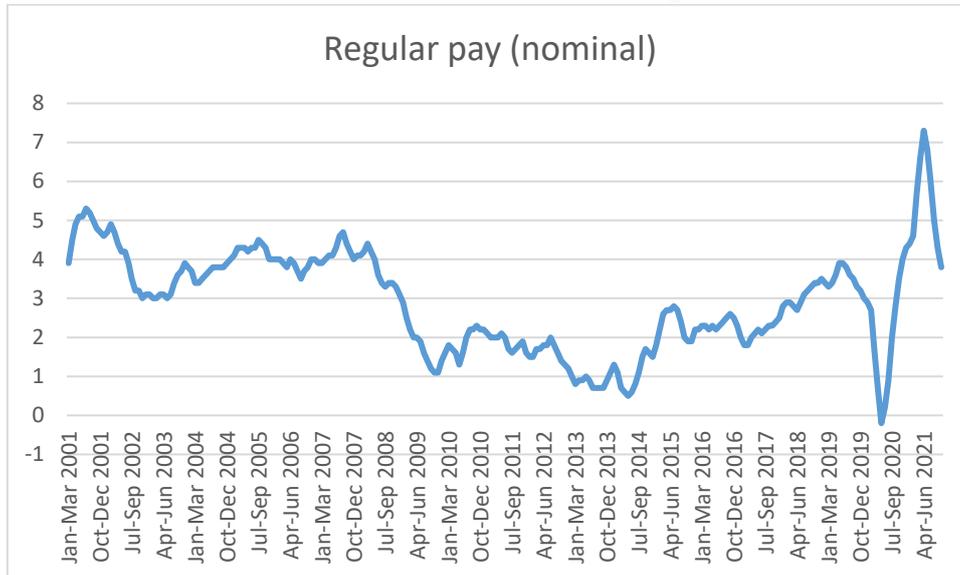
With fuel prices, housing costs, and food costs increasing at a rapid rate, the financial squeeze could impact on how and when some people travel. This paper begins to think through some of the issues that might impact on travel patterns as prices increase.

What are the main pressures

- Inflation is currently running at the highest levels for around 30 years.

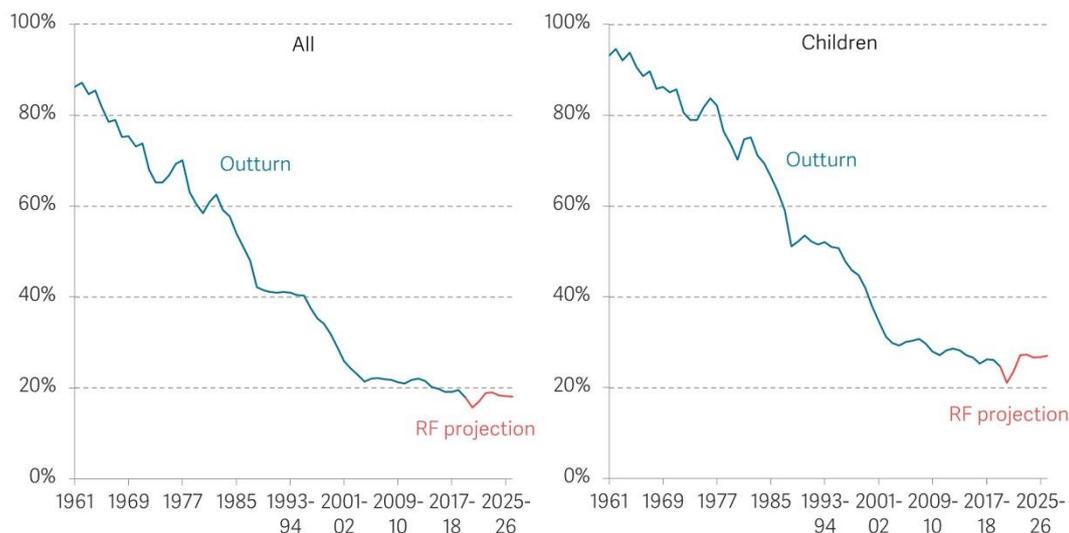


- Regular pay is now increasing at a slower pace than inflation (and levels are falling).



- When inflation rises at a faster rate than wages people are left with less money in their pocket, meaning that more people are pushed to make difficult decisions on what they will spend their money on.
- The Resolution Foundation predict that the impact of high inflation will be to push more people into absolute poverty, with the greatest impact being seen amongst children.

Proportion of people/children living in absolute poverty, after housing costs: GB/UK



Notes: Data source changes in 1994-95. GB prior to 2001-02. See A Corlett & L Try, The Living Standards Outlook 2022, March 2022, Resolution Foundation for details of our projection methodology.
 Source: IFS, Living standards, poverty and inequality in the UK; RF analysis of DWP, Households Below Average Income; and RF projection including use of the IPPR Tax Benefit Model, ONS data, and OBR forecasts.
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- Whilst at least some trips may be viewed as a necessity, a significant proportion of public transport trips are discretionary (such as leisure trips, short trips that could be walked, trips to an office where you can work from

home), so as budgets get tighter there are choices to be made around whether to make a trip and how to make the trip.

Impact on people

- Higher interest rates will increase the cost of mortgages and rents, increasing the proportion of income that is spent on housing. The average cost of buying a house increased by 7.5% in 2001, slightly down on the previous year. Rental costs increased by 2% in the UK in 2021, the largest increase since 2017. However, in the UK outside of London the rate was actually 3%.
- Food costs are also increasing, meaning that food is now taking up a larger proportion of income than before. Food prices increased by 5% over the last year ([Cost of living: six in ten have noticed food prices rising in their local shops | YouGov](#)), but there is some evidence that staple items and items from the cheaper ranges have increased at much higher prices ([Jack Monroe on Twitter: "Woke up this morning to the radio talking about the cost of living rising a further 5%. It infuriates me the index that they use for this calculation, which grossly underestimates the real cost of inflation as it happens to people with the least. Allow me to briefly explain." / Twitter](#))
- Gas and Electric costs have doubled over the last year, with more rises likely when the price cap is next reviewed in October. This is expected to push around 5 million people into fuel poverty ([Energy price cap: Worst hit areas revealed as two in five households with children affected by fuel poverty | UK News | Sky News](#)). However, this spread is not even, with up in 90% of households in the most deprived places facing fuel poverty.

Impact on transport providers

- High levels of inflation will increase cost pressures on public transport providers. Whilst some pressures will be the same across modes, there will also be differential impacts across modes

For all modes

- Inflation will increase pressure for higher wage growth, increasing the cost of service provision.
- Cost of maintenance – it is likely that the cost of spare parts and servicing will continue to increase.
- Cost of new vehicles – a worldwide manufacturing slow down during covid and high demand in the aftermath have combined to drive up unit costs for new vehicles.

Bus

- Increasing fuel costs – although large operators hedge their fuel supplies, cost pressures will see prices increase.

Light rail

- Electricity prices have risen sharply over the last year, and may continue to do so. Light rail networks are likely to be on fixed term deals, so may be exposed to a sudden, and significant, increase in operating costs.

Rail

- Rail faces a mixture of the problems faced by bus and light rail with both electric and diesel fuel being used.

What might this do to travel patterns

- Although some trips can be viewed as essential (such as going to a place of work where your presence is required), a large number of public transport trips are discretionary, meaning that there is significant scope for people to change their travel habits as the pressures from inflation bite.
- Some of the main areas that could be impacted are:
 - Leisure trips – if people have less disposable income they may cut back on leisure activities, which in turn would reduce trip numbers
 - Bus users – the bus is generally used by people on lower incomes – this could make bus trips more vulnerable than some other modes
 - Work from home – an increase in the cost of travel could lead to more people working from home again, particularly over the summer months when heating costs are not prohibitive.
 - Driving – fuel costs have increased significantly in the last year, putting pressure on the cost of motoring. This is coupled with slow down in car manufacturing due to parts shortages and changing demand, and a significant increase in the cost of used cars. This trend could see some drivers considering other options such as cutting back on trips or using public transport where it may be more advantageous.
- Overall, people may have less reasons to travel, reducing demand for public and private transport. This will not hit all segments of society equally. Whilst the poorest are likely to have to make the most adjustments (they had little to no discretionary money to start with), there will also be a squeezed middle who may look to change their travel habits to save money.

Other implications



- The relative cost of public and private transport will be more in the spotlight which may lead to more initiatives (or pressure for initiatives) either to cut the cost of public transport (on cost of living grounds or to attract car users who want to reduce their fuel costs or both). There is also read across from this into how public transport is marketed.
- Energy security is becoming a more prominent issue as is the moral case (in relation to Russian energy) for moving away from fossil fuels. This may play in favour of active travel, electric transport and more energy efficient modes of transport both in terms of acceleration of supportive policy and public attitudes (there is also read across into how public transport is marketed).
- On the other hand recent gov and NGO docs have highlighted the scale of the practical task of moving to a fully decarbonised transport system. With a greater focus on energy and raw materials security this becomes even more challenging with the potential for slowing of ambitions.
- As electric car take up accelerates the relative cost of using electric car v fossil fuel car v public transport becomes more important. There could be a shift to greater take up of electric cars (particularly if cheap recharging is available or electric car use is ince) at the expense of public transport.

Version one (12th April 22)