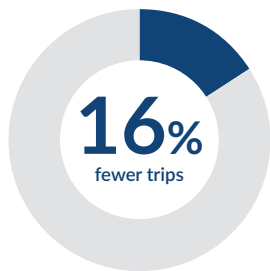


ALL CHANGE?

The future of travel demand and the implications for policy and planning

People are travelling less. How much less?



we make 16% fewer trips than in 1996



we spend 22 hours less travelling than we did a decade ago



we travel 10% fewer miles than in 2002



These changes are not a 'blip' but have been happening since the 1990s

Society is changing. This is having a big impact on who travels, and how much

People under 60 are travelling less than before
This is particularly true for under 30s

Young people are learning to drive later and are making fewer trips by car



From its peak in 1992/94 driving licence holding has **fallen by**

19% for 17-20 yr olds
12% for 21-29 yr olds

Young people (17-29) are now making fewer trips by car, compared with 1992/94

Men 44% fewer trips
Women 26% fewer trips

Why are young people driving less?

It is a combination of factors.

- More precarious employment
- Rising car insurance costs
- Starting families later
- Staying in education longer
- Living at home longer due to housing costs
- Shift to more urban living
- Preferences have changed

This is not just 'car later' but 'car less'. As young people start families they do use cars but not to the same degree as previous generations.



1

In the 1990s, 80% of people drove by age 30



1

Today, 80% of people drive by age 45

The activities we travel to take part in are changing

The types of jobs people do, where, when and how often is all changing



↑ There are now **more people in employment**

↑ The population has grown

↓ But there are overall **fewer commute trips**

The way we shop is undergoing major change



On-line shopping is **growing at 10-12%** per year. It is now almost 17% of total UK retail sales.



The rise in on-line has coincided with a **30% decrease in physical shopping trips** over the past decade and a **16% decline in distance travelled**

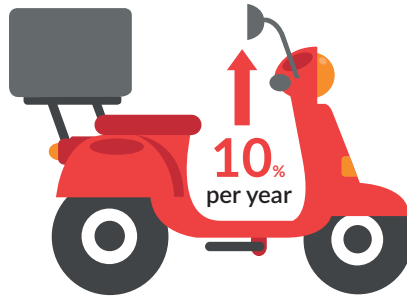
Yet traffic is still growing right?

Van traffic is growing at 5% per year

Motorway traffic is **increasing**



599m fast food deliveries made in 2016



next day deliveries grew by



between 2012 and 2015

...but it's not that simple



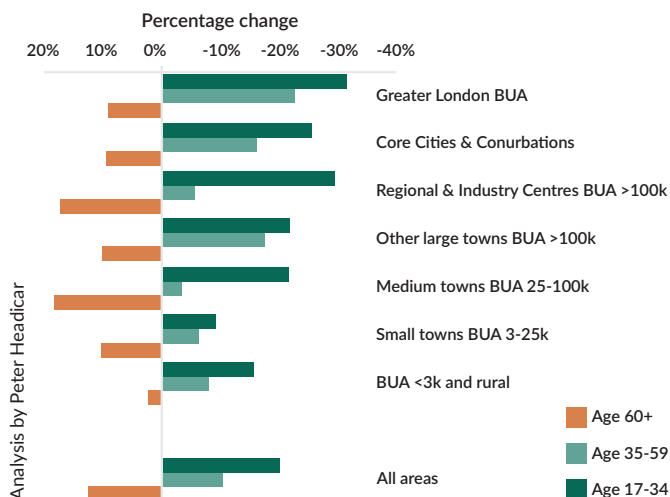
City centre traffic has **decreased**

- On the motorway network there is significant traffic growth
- BUT in major cities traffic levels have reduced and more people reach the centre by public transport
- FOR INSTANCE Greater Manchester data shows **38% increase** in motorway traffic and a **40% decrease** in city centre traffic since 1996
- AND Bristol shows a **15% increase** in motorway traffic and an **11% decrease** in city centre traffic since 2014

Areas with high GVA growth have achieved this with traffic reductions

To understand how travel might change in the future we need to pay more attention to changes in society

Percentage change in car driver miles per head per year by age group and area type and Built Up Area (BUA) size: England, 2002-5 to 2011-14



Some reasons why traffic has continued growing

- The number of miles driven per capita by 65 year olds and older has **increased** by around **12%** over the decade to 2014
- The population is growing due to net immigration and an aging population
- The 'baby boomers' who are entering retirement now have higher car ownership levels than previous cohorts and drive more

If younger people continue to travel less and drive less as activities change then growth will be much lower