Chapter 12

Transport

- The total distance travelled by people in Great Britain increased by 95 per cent since 1971, to 817 billion passenger kilometres in 2007. (Table 12.1)

- The proportion of households with two cars in Great Britain increased from 6 per cent in 1971 to 27 per cent in 2007. (Figure 12.4)

- Motoring costs rose by 95 per cent between 1987 and 2008 in the UK, compared with a rise in the 'All items' retail prices index (RPI) of 110 per cent. (Figure 12.12)

- The average prices of premium unleaded petrol and diesel in the UK reached a peak in July 2008, at 119.6 pence per litre and 133.0 pence per litre respectively. (Figure 12.14)

- In Great Britain in 2007, 2,946 people died as a result of road accidents, a 7 per cent decrease from 2006, with deaths among car users decreasing by 11 per cent over the same period. (Page 185)

- There was a 52 per cent increase in the number of domestic passengers at UK airports between 1997 and 2007. (Table 12.20)

Long term trends have continued in many areas of transport and travel over the last ten years. Trends including the increase in the distance each person travels in a year, the rising number of cars on the roads and the ever-increasing reliance on the car as a means of transport. Overseas travel, particularly by air, increased substantially over the decade, though it still accounts for a very small proportion of total distance travelled. However, within these trends there are pronounced variations in people's travel patterns depending, for example, on their age, sex, where they live, their access to public transport or a private motor vehicle, and income.

Travel patterns

People in Great Britain travelled 817 billion passenger kilometres (508 billion passenger miles) in 2007 by road, rail and air (Table 12.1), almost double the 419 billion passenger kilometres travelled in 1971. Car and van travel accounts for the largest share of overall distance travelled, making up 84 per cent of all passenger kilometres travelled in 2007, a rise of 120 per cent from 1971.

There was a rapid increase in the distance travelled by car and van in the 1980s, but this changed to more gradual growth from the 1990s. The total distance travelled by car and van rose by an average of nearly 5 per cent a year in the 1980s compared with an annual average of 1 per cent between 1991 and 2007.

Table 12.1

Passenger transport: by mode

Great Britain Billion passenger kilometres

	1971	1981	1991	2001	2007
Road[1]					
Car and van[2]	313	394	582	654	689
Bus and coach	60	48	44	47	50
Bicycle	4	5	5	4	4
Motorcycle	4	10	6	5	6
All road	381	458	637	710	749
Rail[3]	35	34	39	47	59
Air[4]	2	3	5	8	10
All modes	419	495	681	765	817

1 Road transport data from 1993 onwards are not directly comparable with earlier years. See Appendix, Part 12: Road traffic.
2 Includes taxis.
3 Data for rail relate to financial years (for example 1970/71).
4 Data for air are domestic flights only and include Northern Ireland, the Channel Islands and the Isle of Man.

Source: Department for Transport

Around one in seven (14 per cent) of all travel in 1971 was by bus and coach, accounting for 60 billion passenger kilometres. This declined to a low of 43 billion passenger kilometres in 1992 but has since risen to around 50 billion passenger kilometres in 2007, accounting for 6 per cent of all travel (see also the section on Public transport later in this chapter).

Although rail travel increased from 35 billion to 59 billion passenger kilometres between 1971 and 2007 it has fallen from 8 per cent to 7 per cent as a proportion of the total distance travelled. Travel by rail reached its lowest point in 1982 when 31 billion passenger kilometres were travelled, but six years later this had risen to 41 billion passenger kilometres. Rail travel declined again during the early to mid-1990s but there has been a steady increase in passenger kilometres throughout the late 1990s and into the new century. From 2000, the distance travelled by rail continued to rise steadily by an average of 3 per cent a year (see also the section on Public transport later in this chapter).

The distance travelled by domestic air flights in 2007 is five times that travelled in 1971, accounting for 10 billion passenger kilometres. Although air travel showed the fastest growth of any means of transport over the period, it represented only 1 per cent of the total domestic distance travelled in Great Britain in 2007 (see also the section on International travel at the end of this chapter).

In Great Britain an average 7,133 miles (11,479 kilometres) were travelled per person in 2006, 2 per cent more than in 1995–97 (Table 12.2). Car travel accounted for four-fifths of the total distance travelled in 2006 and this proportion has remained fairly stable since 1995–97. The second most common mode of transport used was rail, at 8 per cent of the total distance travelled (541 miles per person per year, including London Underground), a 2 per cent increase from 2005 and a 42 per cent increase from 1995–97.

The average distance travelled per person by bus in Great Britain decreased by 3 per cent in 2006 to 453 miles from the 1995–97 total of 468 miles. However, in 2003 the average distance travelled per person by bus rose to 512 miles, making up 7 per cent of the total distance travelled during that year. Walking accounted for almost 3 per cent of the total distance travelled per person per year in 2006, the same proportion as for other modes of transport, which included travel by taxi, motorcycle, air and ferries.

The number of trips made, distance travelled and time spent travelling by all modes of transport varies according to whether a household owns a car. In 2006 people from car owning

Table 12.2

Average distance travelled:[1] by mode

Great Britain | Miles

	1995–97	1998–2000	2003	2005	2006
Car driver[2]	3,623	3,725	3,660	3,682	3,660
Car passenger[2]	2,082	2,086	2,098	2,063	2,033
Walk[3]	200	198	201	197	201
Bus[4]	468	474	512	476	453
Rail[5]	380	467	452	528	541
Bicycle	43	40	37	36	39
Other[6]	184	174	231	225	206
All modes	6,981	7,164	7,192	7,208	7,133

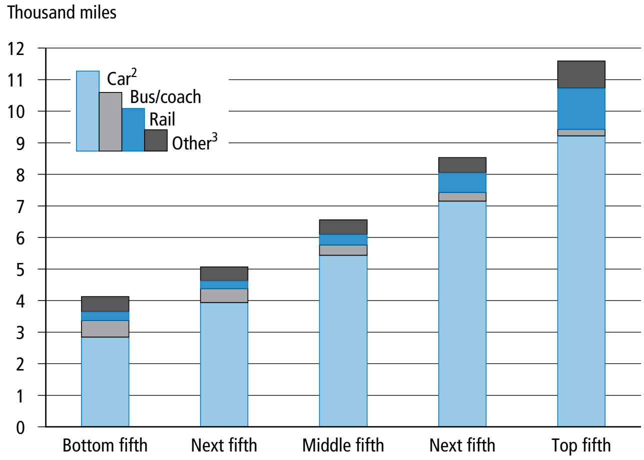
1 Average distance travelled per person per year. See Appendix, Part 12: National Travel Survey.
2 Includes van drivers and passengers.
3 Short walks were believed to be under-recorded in 2002 and 2003 compared with other years.
4 Includes private hire buses, local and non-local buses and London buses.
5 Includes London Underground.
6 Includes taxi/minicab, motorcycle/moped, other private vehicles, domestic air and ferries, light rail.

Source: National Travel Survey, Department for Transport

Figure 12.3

Distance travelled per person: by household income quintile group[1] and mode of transport, 2006

Great Britain



1 Households are ranked according to their income and then divided into five groups of equal size. The bottom fifth, or bottom quintile group, is then the 20 per cent of households with the lowest incomes. See Chapter 5: Income and wealth, Analysing income distribution text box.
2 Either driver or passenger.
3 Includes walking, cycling, taxi/minicab, motorcycle/moped, other private vehicles, domestic air and ferries, light rail.

Source: National Travel Survey, Department for Transport

households in Great Britain made an average of 41 per cent more trips by any mode of transport than those from households without a car. People from car owning households travelled more than two and a half times the distance than those households without a car over the year. However, in 2006 people in households without a car made more than four and one-half times as many trips by bus or coach, three and one-half times as many by taxi, and two-thirds more trips on foot than people in households with a car.

People in car owning households who have a full driving licence, but who are not the main driver of the household, made 18 per cent fewer trips in 2006 than the main driver and travelled around 78 per cent of the distance travelled by the main driver. Non-drivers in car owning households made 18 per cent more trips than people in non-car owning households, they also travelled further, with around two-thirds (62 per cent) more mileage than people in non-car owning households.

Car travel accounts for the greatest proportion of distance travelled in every income quintile group (see Chapter 5: Income and wealth, Analysing income distribution text box on page 66). The total distance travelled per person per year increases as household income increases (Figure 12.3). In Great Britain in 2006 people in the lowest income quintile group (or bottom fifth) travelled an average 2,838 miles (4,566 kilometres) by car, accounting for 69 per cent of the average distance they travelled.

In comparison, people in the highest income quintile group (or top fifth) travelled an average 9,213 miles by car, accounting for 80 per cent of the average distance they travelled.

As income levels increase, distance travelled by bus or coach decreases: 13 per cent of the distance travelled by people in the lowest income quintile group was by bus and coach compared with 2 per cent travelled by those in the highest income group. Conversely, the number of miles travelled per person by rail increased with income. In 2006 individuals in the lowest income quintile group travelled an average 276 miles by rail while those in the highest income quintile group travelled 1,297 miles, representing 7 per cent and 11 per cent of the distance travelled by each group respectively.

Car travel in 2006 also accounted for the greatest proportion of trips made by individuals in each income quintile group in Great Britain, and this proportion rose as income increased. In 2006, 46 per cent of trips made by people in the lowest income quintile group were by car compared with 71 per cent by those in the highest income quintile group. As with distance travelled, individuals in the lowest income quintile group made more trips by bus or coach than those in the highest income quintile group (13 per cent compared with 3 per cent). Trips made by rail increased considerably as income increased: 14 trips per person in the lowest income quintile group were made by rail compared with 61 trips made by those in the highest income quintile group.

Motor vehicles

The proportion of households in Great Britain with one car has remained stable from the early 1970s to 2007, at around 45 per cent over the period (Figure 12.4). However, the proportion of households with no car more than halved, from 48 per cent in 1971 to 23 per cent in 2007, while the proportion of households with two cars increased more than fourfold, from 6 per cent to 27 per cent over the period. The proportion of households with three or more cars also steadily increased to 6 per cent in 2007, an increase of 5 percentage points from 1971. See Appendix, Part 12: Car ownership.

People living in urban areas have better access to more frequent public transport than people living in rural areas, making it easier for them to manage without a car (see Appendix, Part 12: Area type classification). In 2007, 43 per cent of households in London did not own or have access to a car compared with 31 per cent in other built-up metropolitan areas and 10 per cent in rural areas. Around one-half (51 per cent) of households in rural areas had access to two or more cars compared with one-sixth (16 per cent) in London and more than one-quarter (27 per cent) in other metropolitan areas.

The availability of a car is closely related to income. In 2007, 54 per cent of households in Great Britain in the bottom fifth of the income distribution (or lowest income quintile group) did not have a car, compared with 10 per cent in the top income quintile group (Figure 12.5). Nearly one-half of households in the second lowest and middle income quintile groups had one car (46 per cent and 49 per cent respectively) compared with nearly two-fifths of households in the lowest and highest income quintile groups (37 per cent and 39 per cent respectively). More than one-half of households in the top income quintile group had two or more cars (51 per cent). This proportion decreases as income decreases to reach 8 per cent among households in the bottom income quintile group.

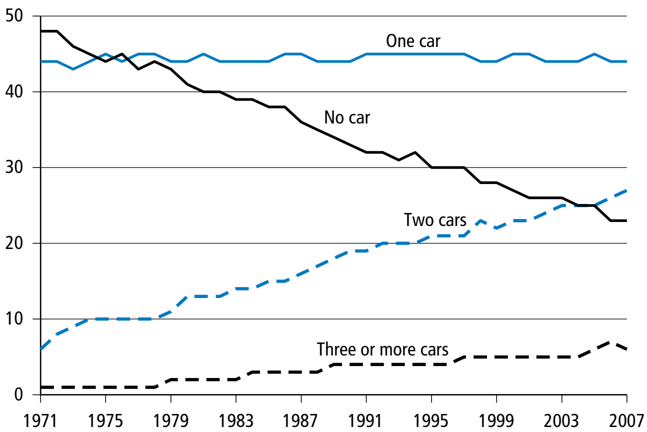
Nearly one-half (47 per cent) of people aged 17 and over in the bottom income quintile group lived in households without a car compared with less than one in ten (7 per cent) of those in the highest income quintile group. Engine size and the age of household cars also vary by household income. Nearly one-fifth (19 per cent) of cars owned by households in the highest income quintile group in Great Britain in 2007 had engines of over 2000cc compared with nearly one in ten (9 per cent) in the lowest income quintile group. The higher the household income, the greater the likelihood of owning a new vehicle. In 2007, 10 per cent of cars owned by people in the highest income quintile group were less than a year old and 15 per cent were more than 10 years old. This compares with 4 per cent and 31 per cent respectively for cars owned by the lowest income quintile group.

Figure 12.4

Households with regular use of a car[1]

Great Britain

Percentages



1 See Appendix, Part 12: Car ownership.

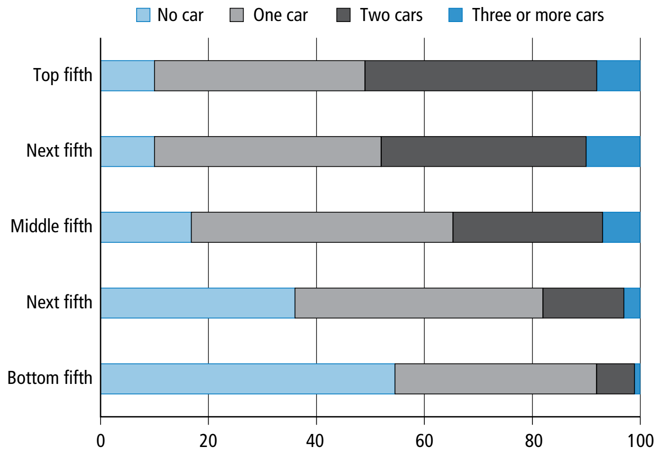
Source: General Household Survey (Longitudinal), Office for National Statistics

Figure 12.5

Household car availability: by household income quintile group,[1] 2007

Great Britain

Percentages



1 Households are ranked according to their income and then divided into five groups of equal size. The bottom fifth, or bottom quintile group, is then the 20 per cent of households with the lowest incomes. See Chapter 5: Income and wealth, Analysing income distribution text box.

Source: National Travel Survey, Department for Transport

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Table 12.6

Average daily flow[1] of motor vehicles: by class of road[2]

Great Britain Thousands

	1983	1988	1993	1998	2001	2007
Motorways	31.2	49.6	58.2	68.7	71.6	77.4
All 'A' roads	11.3	13.7	11.3	12.4	12.6	13.2
Urban major roads	17.2	19.4	19.2	20.2	20.1	20.0
Rural major roads	8.7	11.3	8.9	10.0	10.3	11.0
All major roads[3]	..	..	14.4	16.3	16.7	17.7
All minor roads	1.1	1.3	1.3	1.3	1.4	1.5
All roads	2.1	2.9	2.9	3.2	3.3	3.6

1 Flow at an average point on each class of road.
2 Motorways include trunk motorways and principal motorways. Urban major roads include roads in built up areas prior to 1993. Rural major roads include roads in non-built up areas prior to 1993. See Appendix, Part 12: Road traffic.
3 Includes all trunk and principal motorways and 'A' roads.

Source: National Road Traffic Survey, Department for Transport

Traffic growth varies according to the general level of activity in the economy. In the period between 1985 and 2007, the greatest growth in traffic was in the period of strong economic growth in the late 1980s, while there was little growth during the recession of the early 1990s. This was followed by a period of stronger growth in the mid to late 1990s. Between 1983 and 2007, average daily traffic flows increased by 71 per cent to 3,600 vehicles per day in Great Britain, averaged over all classes of road (Table 12.6). Motorways had the highest flow of vehicles, at 77,400 vehicles per day in 2007; this was nearly two and one-half times the flow in 1983 (31,200 vehicles). There were also large increases in traffic flow on major roads in rural areas during the same period (26 per cent), while the increase on urban major roads was 16 per cent.

There are certain factors affecting the daily flow of vehicles across Great Britain, such as regional population. In 2007, the average daily flow across all roads in England was 4,000 vehicles per day, twice the average for Scotland (2,000 vehicles per day) which was also lower than Wales (2,300 vehicles per day). The busiest motorways in 2007 were in the London Region, with an average flow of 97,400 vehicles per day. The quietest motorways were in Scotland, with an average daily flow of 44,300 vehicles. Motorways in Wales had an average daily flow of 67,400 vehicles. The busiest section of motorway in Great Britain in 2007 was the M25 western links from the A1(M) to the M23, with an average daily flow of 147,000 vehicles, and the quietest was the M74 between Glasgow and the Scottish border, averaging 35,000 vehicles per day.

More than 1.7 million car driving tests were taken in Great Britain in 2007/08, 49 per cent by men and 51 per cent by women. Although more women took the test the proportion of men who passed was higher, at 47 per cent compared with 41 per cent. For men and women aged 17 to 24 the pass rates were similar, at 49 per cent and 45 per cent respectively, with 594,243 tests being taken by men and 597,929 by women. Although more women take their driving test than men, the pass rates for men are consistently higher than those for women in all age groups, and the pass rates for both sexes fall as age increases (Figure 12.7). In 2007/08, 69 per cent more women than men took a driving test between the age of 50 to 59 (13,252 compared with 7,857) and 111 per cent more women aged between 60 and 69 (3,136 tests taken by women compared with 1,483 taken by men).

In Northern Ireland more than 65,000 people took their driving test in 2007/08, 47 per cent were men and 53 per cent were women. As in Great Britain, men were more likely to pass than women, particularly in the older age groups; 51 per cent of men under the age of 25 passed the test compared with 43 per cent of women while for those aged 45 and over, 49 per cent of men passed compared with 39 per cent of women.

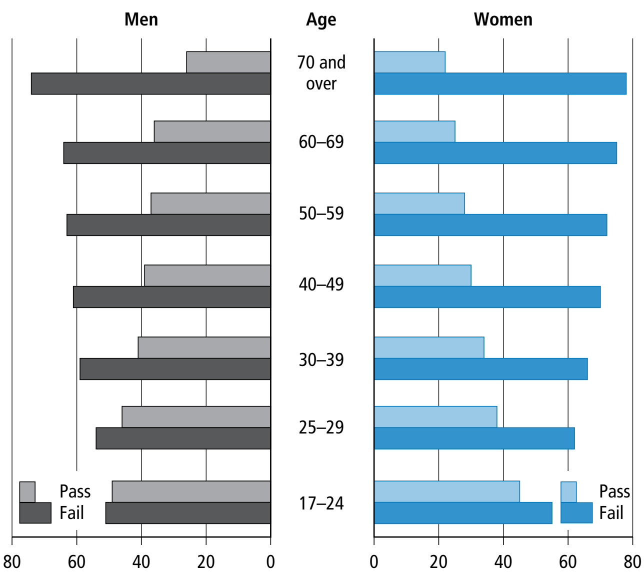
The number of young adults holding full car driving licences in Great Britain has decreased since the early 1990s, although this

Figure 12.7

Car driving test pass and failure rates:[1] by sex and age, 2007/08

Great Britain

Percentages



1 People who passed or failed their driving test as a proportion of those in each age group who took a test.

Source: Driving Standards Agency

trend has reversed in recent years. In 2007, 38 per cent of those aged 17 to 20 held a licence, compared with 27 per cent in 2004 and 32 per cent in 2005. There has been a large increase in the proportion of older women holding a driving licence. Between 1995/97 and 2007 the proportion of women aged 60 to 69 holding licences increased from 45 per cent to 63 per cent, while for women aged 70 and over the increase was from 21 per cent to 36 per cent. Corresponding figures for men were 83 per cent to 87 per cent for those aged 60 to 69 and 65 per cent to 75 per cent for men aged 70 and over.

Public transport

In terms of the number of journeys taken, buses and coaches are the most widely used form of public transport. More than 4.9 billion passenger journeys in Great Britain were made by local bus in 2006/07, more than double the number of journeys made by rail. Two-fifths of the journeys on local buses took place in London. In Northern Ireland 68 million passenger journeys were made in 2006/07 (64 per cent on Ulsterbus and 36 per cent on the Metro).

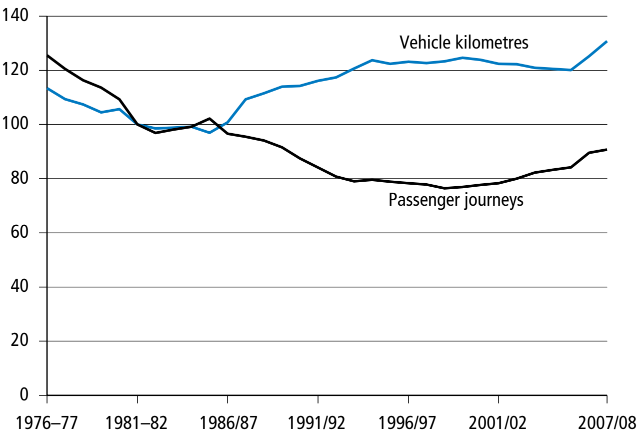
In Great Britain, the trend in local bus use, measured by the number of passenger journeys, was generally downwards from 1976–77 and then started to increase from 1999/2000 (Figure 12.8). In terms of the overall distance travelled by buses on bus routes, the low point was reached nearly 15 years earlier in 1985/86, at 2.1 billion kilometres (1.3 billion miles). It then rose until the mid-1990s, when it stabilised at around 2.6 billion kilometres. However, in 2006/07 distance travelled

Figure 12.8

Bus travel[1]

Great Britain

Index numbers (1981–82=100)



1 Local services only. Includes street-running trams but excludes modern 'supertram' systems. Financial years from 1985/86.

Source: Department for Transport

Table 12.9

Frequency and reliability of local buses[1]

Great Britain Percentages

	2002	2004	2006
Frequency of local buses			
Frequent[2]	77	75	78
Neither frequent nor infrequent	8	9	8
Infrequent[2]	15	16	14
Reliability of local buses			
Reliable[2]	80	77	80
Neither reliable nor unreliable	6	8	8
Unreliable[2]	14	15	13

1 Respondents were asked 'How would you rate the frequency of local buses' and 'How would you rate the reliability of local buses'. Those who did not use buses, had no local service or no opinion are excluded.
2 Data are for those who responded 'very' or 'fairly' for each statement.

Source: National Travel Survey, Department for Transport

by bus rose to 2.7 billion kilometres in Great Britain. In Northern Ireland 70 million kilometres were travelled by bus in 2006/07, a rise of 3 per cent from 2005/06.

The distance people live from their nearest bus stop affects how much they use buses. In 2007, 86 per cent of households in Great Britain lived within six minutes walk of a bus stop and of those, 29 per cent travelled by bus at least once a week compared with 14 per cent of those living 14 minutes or more away from their nearest bus stop.

People in households in Great Britain were asked to rate the frequency and reliability of their local buses through the National Travel Survey, conducted by the Department for Transport. Findings show that since 2002 the proportion of households rating their local bus service as very/fairly frequent or reliable remained reasonably constant, between three-quarters and four-fifths for both indicators (Table 12.9). However, the proportion of households rating their local bus service as very frequent increased from 22 per cent in 2002 to 28 per cent in 2006. Over the same period the proportion of households rating their local service as very/fairly infrequent or unreliable also remained relatively unchanged, at one in seven.

Travel on local buses is most common among people aged under 30 and those aged 60 and over, partly reflecting the lower proportions of driving licence holders in these age groups compared with those aged 30 to 59. In 2007, more than one-half (51 per cent) of 17 to 20-year-olds reported using a local bus at least once a week, compared with

32 per cent of people aged 21 to 29, 31 per cent of those aged 60 to 69, and 36 per cent of those aged 70 and over.

The *Transport Act 2000* required all local authorities to provide assistance with bus fares to a minimum standard of one-half fare for women aged 60 and over, men aged 65 and over (lowered to aged 60 since April 2003) and disabled persons. From 1 April 2006, free local concessionary bus travel was introduced in England for disabled passengers and those aged 60 and over. In 2007 the take-up rate for the scheme in England was 68 per cent, an increase of 5 percentage points from the previous year. There was variation by area type, with take-up ranging from 49 per cent in rural areas to 85 per cent in London. However, this gap is narrowing as take-up has increased more among rural residents than in other areas.

Since April 2008, residents in England who are aged 60 and over or who are 'eligible disabled' are entitled to a free annual bus pass giving free off-peak travel on local buses anywhere in England. Off-peak travel is between 9.30 am and 11 pm Monday to Friday and all day at weekends and on public holidays. In Wales, residents who are aged 60 and over are entitled to a free bus pass, which can be used at any time of the day, to travel on all local bus services in Wales. Scotland offers free bus passes as in Wales for residents who are aged 60 and over and for those who qualify on the grounds of disability, which also includes free travel on scheduled long distance coach services within Scotland. In Northern Ireland residents aged 65 and over can travel on buses for free with a Senior SmartPass. In October 2008 this scheme was extended to residents aged 60 to 64.

The number of passenger journeys made on Great Britain's railway network (including underground and metro systems) rose by 300 million between 2005/06 and 2007/08 to 2.5 billion, an increase of 13 per cent (Table 12.10). Between 2006/07 and 2007/08 the increase in journeys was 6 per cent (146 million). In Northern Ireland, passenger journeys increased by 1.8 million (23 per cent) between 2005/06 and 2007/08 and by one million (12 per cent) between 2006/07 and 2007/08.

In Great Britain there were around 1.3 billion rail passenger journeys per year in the early 1980s and, apart from a period in the early 1990s when journey numbers fell, the number of journeys generally increased. In 2007/08 more than 1.2 billion passenger journeys were made on the national rail network,

Table 12.10

Passenger rail journeys:[1] by operator

Great Britain Millions

	1981	1991/92	1996/97	2001/02	2003/04	2005/06	2007/08
Main line/underground							
National rail	719	792	801	960	1,012	1,082	1,232
London Underground	541	751	772	953	948	970	1,096
Glasgow Underground	11	14	14	14	13	13	14
All national rail and underground	1,271	1,557	1,587	1,927	1,973	2,065	2,342
Light railways and trams							
Docklands Light Railway	.	8	17	41	48	54	67
Tyne and Wear Metro	14	41	35	33	38	36	40
Croydon Tramlink	.	.	.	18	20	23	27
Manchester Metrolink	.	.	13	18	19	20	20
Sheffield Supertram	.	.	8	11	12	13	15
Nottingham Express Transit	.	.	.	.	.	10	10
Midland Metro	.	.	.	5	5	5	5
Blackpool Trams	6	5	5	5	4	4	3
All light railways and trams	20	54	78	132	147	162	187
All journeys by rail	1,291	1,611	1,665	2,059	2,119	2,229	2,529

1 Excludes railways and tramways operated principally as tourist attractions.

Source: Department for Transport

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the fourth consecutive year running that passenger journeys on the network have exceeded one billion. Overall, national rail and London Underground accounted for almost all rail journeys in 2007/08, at 49 per cent and 43 per cent respectively.

Light railways and trams accounted for 7 per cent of rail journeys in Great Britain in 2007/08, compared with 1.5 per cent in 1981. Passenger journeys on light railways and trams more than doubled from around 80 million to 187 million between the mid-1990s and 2007/08. Several new light railways and tram lines were built or extended during the last 11 years, such as the Croydon Tramlink in south London and the Metrolink in Manchester. Over the next decade, further extensions to the Docklands Light Railway are proposed as part of the transport system for the Olympic Games and Paralympic Games in 2012, alongside new lines and extensions elsewhere in Great Britain.

Prices and expenditure

The Office of Rail Regulation compiles a rail fare prices index, using data gathered by Atos Origin, which provides a measure of the change in the prices charged by train operating companies (TOCs) to rail passengers. Overall, fares in Great Britain increased by 64 per cent between 1995 and 2008 (Table 12.11). Over the same period the 'All items' retail prices index (RPI) increased by 44 per cent, giving an increase of 14 per cent in real terms. However, prices charged by long distance operators over the period rose by 89 per cent, a 31 per cent increase in real terms.

In spring 2008 rail passengers aged 16 and over in Great Britain were asked about their satisfaction with various aspects of rail travel, from ticket prices to punctuality/reliability of train services. The National Passenger Survey (NPS), conducted by Passenger Focus (the independent national rail consumer watchdog) found that eight in ten (80 per cent) of people were satisfied overall with station and train facilities, an increase of 2 percentage points from spring 2007 but at the same level as spring 2006. When asked about value for money for the price of their ticket, 40 per cent of passengers were satisfied and 39 per cent were dissatisfied, virtually the same responses as those given in spring 2007 and spring 2006. The NPS also found that 79 per cent of passengers interviewed in spring 2008 were satisfied with the punctuality/reliability of their service, up from 77 per cent in spring 2007 and from 74 per cent in 1999 when the survey began. However, 13 per cent of passengers were dissatisfied.

Table 12.11

Rail fare prices index[1,2]

Great Britain Index numbers (1995=100)

	1995	1999	2001	2006	2007	2008
All operators	100	114	120	146	154	164
London and South East operators	100	113	116	136	143	151
Long distance operators	100	116	127	164	175	189
Regional operators	100	112	117	137	143	151
Retail prices index[3] (all items)	100	112	117	133	139	144

1 As at January each year.
2 See Appendix, Part 12: Rail fares index.
3 See Appendix, Part 6: Retail prices index.

Source: Atos Origin from the Office of Rail Regulation

For London and the South East operators 79 per cent of passengers were satisfied overall with station and train facilities in spring 2008, compared with 77 per cent in spring 2007. For long distance operators the proportion of passengers who were satisfied overall was 83 per cent in spring 2008, this was down 4 percentage points from spring 2007 and for most service areas passenger satisfaction was lower than in spring 2007. The majority (84 per cent) of passengers using regional operators were satisfied with their journey overall, an increase from spring 2007 (82 per cent satisfied).

Motoring costs in the UK as measured by the 'All motoring expenditure' component of the RPI rose by 95 per cent between January 1987 and January 2008, slightly less than the rise in the 'All items' RPI measure of general inflation of 110 per cent (see Chapter 5: Income and wealth). Between January 2007 and January 2008 motoring costs contributed to the rise in the annual RPI rate, mainly from petrol and oil prices rising in January 2008 after falling in January 2007. There was also a small upward effect from maintenance of motor vehicles where, overall, prices rose by more than January 2007 (Figure 12.12). However, there was a large, partially offsetting, downward effect from the purchase of motor vehicles, with prices rising at a slower rate than in 2007. There was also a small downward effect from car insurance, which also increased by less than last year.

Vehicle tax and insurance rose by 202 per cent during the period January 1987 and January 2008, although costs fell slightly in the mid-1990s, and maintenance costs rose to 220 per cent above the 1987 level. The cost of petrol and oil more than doubled between 1987 and 2000, before rising to a peak in 2008 of 205 per cent above its 1987 level.

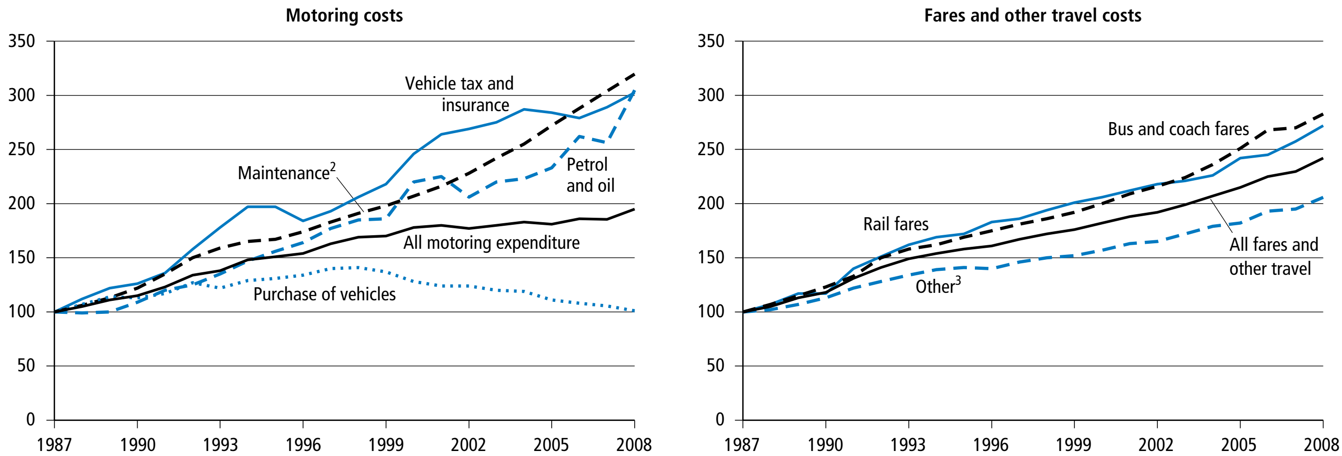
Bus, coach and rail fares in the UK rose by considerably more than the rate of general inflation between 1987 and 2008. Bus and coach fares rose by 183 per cent and rail fares rose by

Figure 12.12

Passenger transport prices[1]

United Kingdom

Index numbers (1987=100)



1 At January each year based on the retail prices index (RPI). For comparison, the 'All items' RPI measure of general inflation in January 2008 was 210. See Appendix, Part 6: Retail prices index.
2 Includes spare parts and accessories, roadside recovery services, MOT test fee, car service, labour charges and car wash.
3 Includes taxi and minicab fares, self-drive and van hire charges, ferry and sea fares, air fares, road tolls, purchase of bicycles/boats and car park charges.

Source: Office for National Statistics

172 per cent. Overall, the 'All fares and other travel' index rose by 142 per cent.

In 2007, transport and travel costs accounted for 16 per cent of all household expenditure in the UK. Table 12.13 overleaf shows that after taking into account the effects of inflation there was little change overall in expenditure on transport and travel costs between 1997/98 and 2007 (an increase in real terms of 1 per cent over this period). There was however stronger growth (6 per cent in real terms) in total household expenditure over the same period.

Between 1997/98 and 2007 the largest increase in motoring expenditure was on insurance and taxation, at 22 per cent, followed by petrol, diesel and other oils, which increased by 11 per cent. Over the same period, the purchase of cars, vans and motorcycles saw the largest decrease, at 13 per cent.

Expenditure on bus and coach fares decreased by 32 per cent between 1997/98 and 2007, while expenditure on rail and tube fares increased by 30 per cent over the same period. Overall, however, spending on fares and other travel costs increased by 4 per cent during this period.

Of the £61.80 spent on motoring per week in 2007, nearly one-half (47 per cent) was spent on the operation of personal transport (£28.80 per week). Most of this was spent on petrol, diesel and other oils (£18.30 per week), with repairs, servicing, spares and accessories together with other motoring costs making up the remainder. In comparison, in 1997/98 44 per cent of motoring expenditure was spent on the operation of personal transport (£27.00 per week), including £16.60 spent on petrol, diesel and other oils per week.

The average price of premium unleaded petrol and diesel fluctuates, and reached a peak of 119.6 pence per litre for premium unleaded and 133.0 pence per litre for diesel in the UK in July 2008 (Figure 12.14 overleaf). The price then began to fall and in December 2008 the average price was 89.1 pence per litre for premium unleaded petrol and 101.2 pence per litre for diesel.

Over the period January 1999 to December 2008, the largest monthly increase for premium unleaded petrol was in June 2000, at 6 per cent, while for diesel the largest monthly increase was in March 1999, at 8 per cent. This was partially the result of an increase in the duty rate for both premium unleaded petrol and diesel. The largest decrease for premium unleaded petrol was in November 2008, at 12 per cent lower than the previous month, this month saw also the largest decrease for diesel where the percentage change from October 2008 was 8 per cent.

In November 2008 the UK was the 12th most expensive country in the EU-27 in which to buy premium unleaded petrol, at 94.7 pence per litre, while Finland was the most expensive, at 114.4 pence per litre. The cheapest priced unleaded petrol was in Lithuania, at 71.2 pence per litre, around one-quarter less on average than in the UK. For diesel, the UK was the

Table 12.13

Household expenditure on transport in real terms[1]

United Kingdom £ per week

	1997/98	1999/00	2001/02[2]	2003/04	2005/06	2007[3]
Motoring costs						
Cars, vans and motorcycle purchase	26.10	28.20	30.40	31.90	25.60	22.80
Repairs, servicing, spares and accessories	8.10	7.80	8.20	7.90	8.60	8.10
Motor vehicle insurance and taxation[4]	8.30	9.10	10.80	11.80	12.40	10.10
Petrol, diesel and other oils	16.60	17.80	17.40	16.90	18.70	18.30
Other motoring costs	2.30	2.30	2.10	2.20	2.50	2.40
All motoring expenditure	61.50	65.30	68.90	70.60	67.80	61.80
Fares and other travel costs						
Rail and tube fares	1.90	2.30	2.20	2.10	2.20	2.50
Bus and coach fares	1.80	1.70	1.70	1.60	1.60	1.20
Taxi, air and other travel costs[5]	5.90	5.80	6.00	6.20	6.80	6.30
All fares and other travel costs[6]	9.70	9.80	9.90	9.90	10.60	10.10
Motoring and all fares	71.10	75.10	78.80	80.50	78.40	71.80
Total expenditure	433.20	446.40	468.90	473.50	474.30	459.20

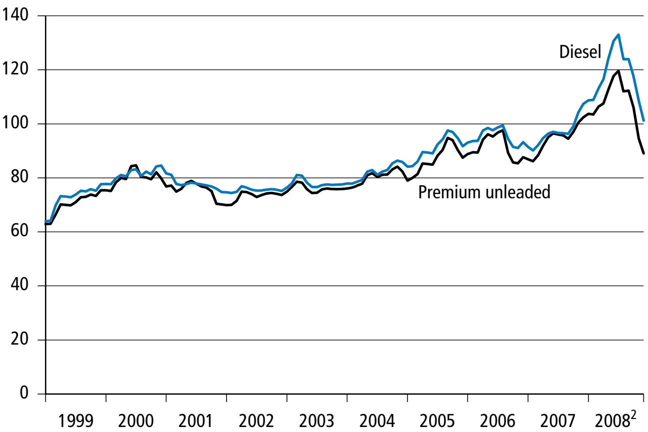
1 At 2007 prices deflated by the 'RPI all items' retail prices index. Expenditure rounded to the nearest 10 pence. See Appendix, Part 6: Household expenditure, and Retail prices index.
2 From 2001/02 onwards data include children's expenditure, and are weighted based on the population figures from the 2001 Census.
3 Figures prior to 2007 are shown based on weighted data using nonresponse weights based on the 1991 Census and population figures from the 1991 and 2001 Censuses. For 2007, figures shown are based on weighted data using updated weights, with nonresponse weights and population figures based on the 2001 Census.
4 Excludes boat insurance.
5 Includes combined fares.
6 Includes expenditure on bicycles and boats – purchases and repairs.

Source: Family Expenditure Survey and Expenditure and Food Survey, Office for National Statistics

Figure 12.14

Premium unleaded petrol[1] and diesel pump prices

United Kingdom



1 Unleaded petrol that is rated at 95 Research Octane Number. Does not include super unleaded petrol.
2 Data for December 2008 are provisional.

Source: Department of Energy and Climate Change

second most expensive country in the EU-27 in November 2008, at 108.6 pence per litre, while Ireland was the most expensive, at 111.8 pence per litre. The cheapest priced diesel was again in Lithuania, at 79.0 pence per litre. These figures have been brought together in a common currency using market exchange rates.

Across the EU-27 taxes and duties form a major component of petrol prices – 60 per cent on average in mid-November 2008 for premium unleaded petrol and 49 per cent on average for diesel. The tax component in the UK on unleaded petrol was the fourth highest in the EU, at 68 per cent. Germany had the highest tax component, at 71 per cent, while Malta had the lowest, at 48 per cent. As with unleaded petrol, the major component of the price of diesel in the UK was tax and duty (61 per cent) and was the highest in the EU.

Transport safety

The Government has targets for substantial improvements in road safety. By 2010, in Great Britain, the aim is to reduce the

Table 12.15

Passenger death rates:[1] by mode of transport[2]

Great Britain — Rate per billion passenger kilometres

	1981	1991	1996	2001	2006
Motorcycle	115.8	94.6	108.4	112.1	106.7
Walk	76.9	69.8	55.9	47.5	35.5
Bicycle	56.9	46.5	49.8	32.6	31.5
Car	6.1	3.7	3.0	2.8	2.5
Van	3.7	2.1	1.0	0.9	0.6
Bus or coach	0.3	0.6	0.2	0.2	0.3
Rail[3]	1.0	0.8	0.4	0.3	0.1
Water	0.4	-	0.8	0.4	0.3
Air	0.2	-	-	-	-

1 See Appendix, Part 12: Passenger death rates.
2 Motorcycle, bicycle, car and van includes driver and passenger fatalities. Water includes fatalities on UK registered merchant vessels. Air includes fatalities involving UK registered airline aircraft in UK and foreign airspace.
3 Financial years up to 1996 (1995/96). Includes train accidents and accidents occurring through movement of railway vehicles.

Source: Department for Transport

number of people killed or seriously injured in road accidents per 100 million vehicle kilometres by 40 per cent compared with the average in 1994–98. Similar targets exist for Northern Ireland (see Appendix, Part 12: Road safety). In Great Britain in 2007, 2,946 people died as a result of road accidents, a 7 per cent decrease from 2006, with deaths among car users decreasing by 11 per cent over the same period. There was a 3 per cent decrease in the number of serious injuries and a 4 per cent decrease in those slightly injured as a result of road accidents over the same period.

The safety levels of most forms of transport in Great Britain are much improved compared with the early 1980s, and improvements in most areas have continued since the early 1990s. Motorcycling, walking and cycling have the highest fatality rates per kilometre travelled than any other form of transport in Great Britain (Table 12.15). In 2006 the highest death rate continued to be for motorcycle users, at 106.7 deaths per billion passenger kilometres travelled. This was over 40 times greater than the death rate for car users.

In 2006, 49 per cent of those killed in road accidents in Great Britain were travelling in cars, 22 per cent were pedestrians, 20 per cent were riders or passengers of motorcycles and 5 per cent were cyclists. Occupants of buses, coaches and goods vehicles accounted for the remaining 4 per cent of deaths.

Department for Transport figures show that on weekdays the highest hourly number of pedestrian fatalities or serious injuries in Great Britain in 2007 occurred between the hours of 3 pm and 4 pm. In 2007 there were 607 people killed or seriously injured at this time of day, equating to an average of nearly two people per day. Among car users the highest number of fatalities or serious injuries occurred between 5 pm and 6 pm, at 596 in 2007, again equating to an average of two people per day.

The UK has a good record for road safety compared with most other EU countries. Across the EU-27 the UK had one of the lowest road death rates for all persons, at 5.4 per 100,000 population in 2006, with only Sweden, the Netherlands and Malta recording lower rates (Table 12.16). Lithuania had the highest recorded road death rate for all persons, at 22.3 per 100,000 population. The EU-27 average was 10.2 per 100,000 population. The UK rate was also substantially lower than that in some other industrialised nations such as the United States (14.3 per 100,000 population), Republic of Korea (13.1) and Iceland (10.4).

The UK also has a relatively good record in terms of road fatalities involving children. In 2006 the UK road accident death rate for children aged under 15 was 1.4 per 100,000

Table 12.16

Road deaths: EU comparison, 2006

Rate per 100,000 population

	All persons	Children[1]		All persons	Children[1]
Lithuania	22.3	..	Portugal	9.2	1.3[2]
Latvia	17.8	..	Austria	8.9	1.8
Estonia	15.2	..	Ireland	8.7	..
Greece	14.9	2.4	Luxembourg	7.8	..
Poland	13.8	2.5	France	7.7	1.2
Bulgaria	13.5	..	Finland	6.4	0.6
Slovenia	13.2	3.2	Germany	6.2	1.2
Hungary	13.0	..	Denmark	5.6	1.3
Romania	11.5	..	United Kingdom	5.4	1.4
Cyprus	11.0	..	Sweden	4.9	1.0
Slovakia	10.8	..	Netherlands	4.5	1.3
Czech Republic	10.4	..	Malta	2.7	..
Belgium	10.2	1.8			
Italy	9.7	..	EU-27 average	10.2	..
Spain	9.4	1.8			

1 Aged under 15.
2 Based on 2005 population data.

Source: International Road Traffic and Accident Database (Organisation for Economic Co-operation and Development); International Transport Forum; Eurostat and CARE (EU road accidents database)

Table 12.17

Road casualties: by age and type of road user, 2007

Great Britain Percentages

	Pedestrians	Pedal cyclists	Motorcycle users	Car users	All road users[1]
Under 16[2]	*32*	*22*	*1*	*6*	*10*
16–24	*19*	*17*	*37*	*29*	*26*
25–34	*12*	*20*	*20*	*20*	*19*
35–44	*10*	*17*	*21*	*17*	*17*
45–54	*7*	*11*	*12*	*12*	*11*
55–64	*6*	*6*	*5*	*8*	*7*
65–74	*5*	*2*	*1*	*4*	*4*
75 and over	*7*	*1*	*-*	*3*	*3*
All casualties[3] (=100%) (thousands)	30.2	16.2	23.5	161.4	247.8

1 Includes other road users, and cases where road user type was not reported.
2 In some cases age 0 may have been coded where the age of the casualty was not reported.
3 Includes cases where age was not reported.

Source: Department for Transport

population. Slovenia had the highest rate in the EU-27, 3.2 per 100,000 population, of those that reported. The UK rate was again lower than some other industrialised nations, with the Republic of Korea reporting a rate of 3.1 per 100,000 population and the United States, at 3.0 per 100,000 population.

The UK had the fifth lowest recorded rate in the EU-27 for all pedestrian deaths in 2006, at 1.2 per 100,000 population. The lowest in the EU-27 was the Netherlands, at 0.4 per 100,000 population, while Poland had the highest, at 4.7 per 100,000 population. The UK had a similar ranking in the number of child pedestrian deaths, having the sixth lowest rate, at 0.6 per 100,000 population. Finland had the lowest rate possible, at 0.0 per 100,000 population, while Slovenia had the highest rate, at 1.1 per 100,000 population.

In Great Britain in 2007 there were 247,780 road casualties of all severities, a 4 per cent reduction from 2006. Those under 16-years-old formed the highest proportion of pedestrian casualties, at 32 per cent (Table 12.17). People aged 16 to 24 were more likely to be casualties from motorcycle or car use, at 37 per cent (8,615 casualties) and 29 per cent (46,417 casualties) respectively, than from any other mode of transport. For motorcycle users this was an increase of 0.3 per cent from 2006 while for car users it was a decrease of 4 per cent.

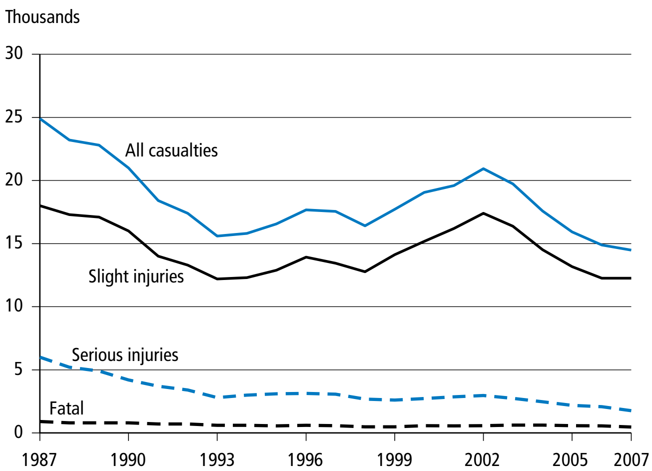
According to the Department for Transport report, *Road Casualties Great Britain: 2007*, young drivers aged under 25 and older drivers aged over 69 are more likely to have a contributory factor recorded than drivers aged between 25 and 69. Contributory factors describe the key actions and failures that led directly to the actual impact to aid investigation of how accidents might be prevented. Young drivers, particularly men, are more likely to have factors related to speed and behaviour recorded, whereas older drivers are more likely to have factors related to vision and judgement recorded. Failing to look properly was the most frequently reported contributory factor and was reported in 35 per cent of all accidents, followed by failure to judge the other person's path/speed (19 per cent) and being careless, reckless or in a hurry (17 per cent). For fatal accidents the most frequently reported contributory factor was loss of control, which was reported in 33 per cent of fatal accidents. Loss of control was also the second largest contributory factor for serious accidents (19 per cent), following failure to look properly, at 30 per cent.

Alcohol is a major contributor to road accidents. The *Road Safety Act 1967* established a legal alcohol limit for drivers, set at 80 milligrams of alcohol in 100 millilitres of blood and made it an offence to drive when over this limit. The Act also gave the police the power to carry out breath testing to determine whether an individual's alcohol level is above the limit of 35 micrograms of alcohol in 100 millilitres of breath. For many years the Government has run national publicity campaigns to discourage drink driving. The number of casualties from road accidents involving illegal alcohol levels in the UK fell sharply between the mid-1980s and early 1990s, from 24,900 in 1987 to 15,600 in 1993 (Figure 12.18). Between 1999 and 2002 the

Figure 12.18

Casualties from road accidents involving illegal alcohol levels:[1] by severity

United Kingdom



1 See Appendix, Part 12: Road safety.

Source: Department for Transport; Police Service of Northern Ireland number of casualties rose to 20,900 before falling to less than 14,500 in 2007.

The number of deaths from road accidents involving illegal alcohol levels declined steadily from less than 1,000 in 1987 to approximately 600 a year in the early to mid-1990s. Following a further decline to around 500 deaths in 1998 and 1999, the number of deaths was relatively stable again, at around 600 a year between 2000 and 2007. Serious injuries from road accidents involving illegal alcohol levels decreased by more than one-half during the 1980s and 1990s to around 2,600 in 1999, and in 2007 fell to around 1,800.

According to the British Social Attitudes Survey, 87 per cent of adults in Great Britain in 2007 agreed or agreed strongly that if someone has drunk any alcohol they should not drive, while 75 per cent agreed or agreed strongly that anyone caught drink-driving should be banned for at least five years. However, 75 per cent of adults agreed or agreed strongly that most people don't know how much alcohol they can drink before being over the legal drink-drive limit.

International travel

The number of trips abroad made by UK residents in 2007, at 69.5 million visits, was the same as the record set in 2006 (Table 12.19). This was a 51 per cent increase on the number of trips made in 1997. In 1997 air travel accounted for 66 per cent of all modes of travel abroad by UK residents while in 2007 it accounted for 81 per cent. The proportion of trips made by sea declined over the same period from 25 per cent to 12 per cent, and trips made through the Channel Tunnel also decreased from 9 per cent to 7 per cent. Holidays accounted for almost two-thirds of trips made abroad by UK residents, 63 per cent in 1997 and 65 per cent in 2007.

In 2007 men in the UK made more visits abroad than women, 38 million visits compared with 31 million visits, and were more likely to travel abroad for business (19 per cent of visits) than women (6 per cent). The preferred mode of travel for business trips made by men was air, at 84 per cent (5.9 million visits). Holidays accounted for a high proportion of women's travel abroad (70 per cent of all trips) with air travel accounting for 83 per cent of trips made for that purpose (17.9 million visits).

In 2007, 32.8 million visits were made to the UK by overseas residents, 29 per cent more visits than those made in 1997 when 25.5 million visits were made to the UK. Of the total number of trips made to the UK by overseas residents in 2007, 25.1 million were made by air and the remainder made by sea or through the Channel Tunnel. Holidays accounted for 10.8 million (33 per cent) of all trips to the UK by overseas residents, followed by visiting friends and relatives in the UK (30 per cent) and business trips (27 per cent).

According to the British Social Attitudes Survey, 66 per cent of adults in Great Britain in 2007 agreed or agreed strongly that people should be able to travel by plane as much as they like, while 30 per cent disagreed or disagreed strongly that the price of a plane ticket should reflect the environmental damage that flying causes, even if this makes air travel much more expensive.

Between 1997 and 2007 there has been a continued and substantial rise in the number of air passengers at UK airports. Over the same period there was a 52 per cent increase in the number of domestic passengers at UK airports (Table 12.20 overleaf). All the major airports, except London Heathrow, experienced growth in domestic air passengers between these years. The largest increases in domestic air passengers were at London City airport, seven times the number in 2007

Table 12.19

International travel by UK residents: by mode of travel and purpose of visit

United Kingdom Percentages

	1997				2007			
	Air	Sea	Channel Tunnel	All modes	Air	Sea	Channel Tunnel	All modes
Holiday	*66*	*61*	*54*	*63*	*65*	*68*	*61*	*65*
Visiting friends and relatives	*13*	*14*	*8*	*13*	*18*	*15*	*12*	*18*
Business	*18*	*9*	*14*	*16*	*13*	*7*	*18*	*13*
Other	*2*	*17*	*24*	*8*	*3*	*10*	*9*	*4*
All purposes (=100%) (millions)	30.3	11.5	4.1	46.0	56.3	8.5	4.6	69.5

Source: International Passenger Survey, Office for National Statistics

Table 12.20

Air passengers:[1] by UK civil airport

United Kingdom Millions

	1997		2001		2007	
	Domestic	International	Domestic	International	Domestic	International
London Heathrow	7.2	50.6	6.6	53.8	5.8	62.1
London Gatwick	2.4	24.4	3.0	28.1	4.0	31.1
London Stansted	1.2	4.2	2.0	11.6	2.6	21.2
Manchester	2.5	13.3	2.8	16.3	3.2	18.7
London Luton	0.7	2.5	1.8	4.8	1.5	8.4
Birmingham	1.1	4.8	1.2	6.5	1.5	7.6
Nottingham East Midlands	0.4	1.5	0.3	2.0	0.7	4.7
Bristol	0.3	1.2	0.5	2.1	1.3	4.6
Liverpool (John Lennon)	0.3	0.4	0.7	1.5	0.8	4.6
Glasgow	3.2	2.8	3.8	3.4	4.6	4.1
Newcastle	0.8	1.8	1.0	2.4	1.7	3.9
Edinburgh	3.2	0.9	4.3	1.8	5.6	3.4
London City	0.1	1.1	0.5	1.2	0.7	2.2
Leeds Bradford	0.5	0.8	0.4	1.1	0.6	2.2
Belfast International	1.8	0.7	2.6	1.0	3.4	1.8
Cardiff	0.1	1.0	0.1	1.4	0.4	1.7
Aberdeen	1.7	0.9	1.7	0.9	1.9	1.5
Belfast City (George Best)	1.3	-	1.2	-	2.1	0.1
Other UK airports	3.3	1.9	3.8	2.9	6.2	8.0
All UK airports	32.1	114.7	38.4	142.8	48.7	192.0

1 Domestic traffic is counted both at the airport of departure and the airport of arrival. International traffic is counted at the airport of arrival.

Source: Civil Aviation Authority

compared with 1997 and Cardiff airport, four times as many over the same period.

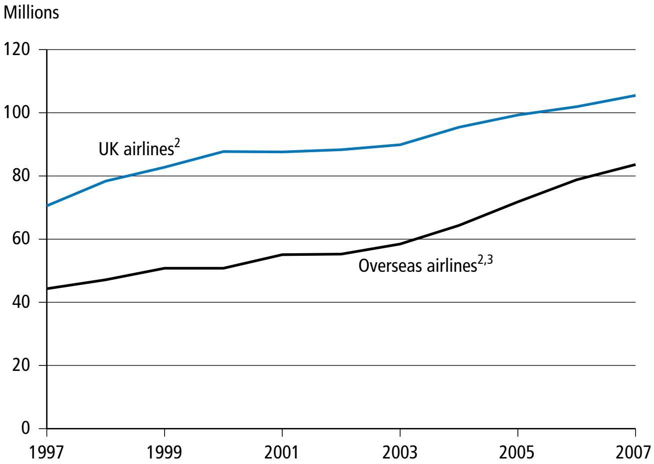
There were nearly four times as many passengers on international flights as there were on domestic flights at UK airports in 2007. Between 1997 and 2007 the largest increases in numbers of international passengers were at London Stansted (17.0 million), London Heathrow (11.5 million), London Gatwick (6.7 million), London Luton (5.9 million) and Manchester (5.4 million). These include passengers in transit to other countries who do not stop overnight in the UK. Other airports have also expanded. Liverpool, for example, experienced an elevenfold increase in the number of international passengers between 1997 and 2007.

The Department for Transport forecasts that demand for air travel is set to continue. Mid-range estimates made in January 2009 suggest that between 2010 and 2030 passenger numbers at UK airports will grow from 270 million to 464 million. Growth in international passengers is forecast to increase by more than two-thirds from 215 million to 363 million passengers, while growth in domestic passengers is set to double from 50 million to 101 million passengers annually.

In 2007, 189 million passengers were carried between the UK and abroad, an increase of 5 per cent on 2006 (Figure 12.21). UK airlines accounted for 106 million passengers carried, around 56 per cent of the total. Between 2006 and 2007 both UK and overseas airlines carried an increasing number of passengers, up by 4 per cent and 6 per cent respectively. However, the biggest change occurred in non-scheduled services by overseas airlines, down by 7 per cent over the year. Between 1997 and 2007 there was a 65 per cent increase in the number of passengers carried between the UK and abroad;

Figure 12.21

Air passengers travelling overseas from UK civil airports:[1] by type of airline



1 Excludes travel to and from the Channel Islands.
2 Includes scheduled and non-scheduled services.
3 Includes airlines of UK Overseas Territories.

Source: Civil Aviation Authority

passengers using scheduled services increased by 92 per cent, while passengers using non-scheduled services decreased by 2 per cent.

In 2007 there were around 1.5 million flights between the UK and abroad, an increase of 3 per cent from 2006 and a 44 per cent increase from 1997, when there were around 1.1 million flights. UK airlines made around 0.8 million flights abroad in 2007, 55 per cent of the total, and of these, 75 per cent were scheduled services. Overseas airlines made a total of around 0.7 million flights between the UK and abroad, 96 per cent of which were scheduled services. Between 1997 and 2007, the number of scheduled services from the UK to abroad increased by 58 per cent while the number of non-scheduled services decreased by 3 per cent.