

INSIDE TRACK

The state of transport 2026



FOREWORD

Welcome to the third instalment of our annual "Inside track" report series, which explores how the transport landscape has evolved over the past decade. Looking back, it's been a decade of considerable change for public transport.

Last year's report highlighted the green shoots of growth evident across transport statistics. I'm pleased to say that many of these green shoots have continued to grow, and that there are further reasons to be optimistic about the future of public transport.

The past year saw major changes to the funding and powers available to Local Transport Authorities (LTAs), with further legislative change to come. All LTAs now have a three year bus funding settlement, providing certainty and removing the constant cliff edges that reduce confidence in the market. Alongside the powers contained in the Bus Services Act 2025, and the Enhanced Partnership review that sits alongside, LTAs now have a range of new tools to help shape and grow their local bus networks.

For areas with an Integrated Settlement, the new funding powers go even further, with long term certainty across a range of functions and the ability to flex between capital and revenue funding to find a mix that best supports their local transport ambitions. This will significantly benefit the five new areas gaining Integrated Settlements from April 2026.

Momentum will continue into 2026 as the Railways Bill and the English Devolution Bill complete their journeys through Parliament bringing with them the promise, through devolution, to place local people and places at the heart of decision making on more parts of the transport network. The year ahead will also see the publication of a new, National Transport Strategy, and, at the local level, refreshed Local Transport Plans.

While it will take time for these interventions to be fully reflected in local and national statistics, early signs are encouraging. New powers and funding certainty are already making a difference on the ground, most notably in Greater Manchester, where the integrated Bee Network (including local control over bus networks) is driving growth in patronage, improving reliability, and increasing revenue. This offers hope that local accountability and decision making can drive our public transport networks forwards, delivering the services that our city regions need if they are to continue to grow.

Jason Prince, Director, Urban Transport Group



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About Urban Transport Group

The Urban Transport Group is the UK's network of transport authorities. Our vision is for cities, towns and their surrounding areas to be green, fair, healthy and prosperous places, supported by public transport and active travel options which provide access and opportunity for all.

urbantransportgroup.org

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IN FOCUS: THE LAST YEAR

City region economies are growing

The economies of our largest city regions are starting to grow. A decade ago, only London was growing at or above the England average economic growth rate, with other core cities and their city regions falling behind¹. This trend is now reversing, and the city regions are beginning to close the productivity gap. However, there is still much more to do if we are to overcome the high levels of inequalities and deliver on the untapped potential.



Trip rates - growing but stabilising

The number of trips each person makes grew by 1% last year, with each person making 922 trips. However, the rate of growth has now fallen for three years in a row, and it appears that trip rates are starting to stabilise².



Bus patronage is stabilising, but there are still areas of growth

Bus patronage is starting to flatline nationally, with a 1% growth recorded in the last year. However, there was above average growth across many of the Combined Authorities, with the fully franchised network in Greater Manchester seeing 11% growth³.



Heavy rail patronage has reached pre-pandemic levels

Heavy rail has become the first public transport mode to reach pre-pandemic patronage levels in national statistics. Although growth has slowed, it was still at 7% for the most recent year and looks like set to continue into the coming year⁴.

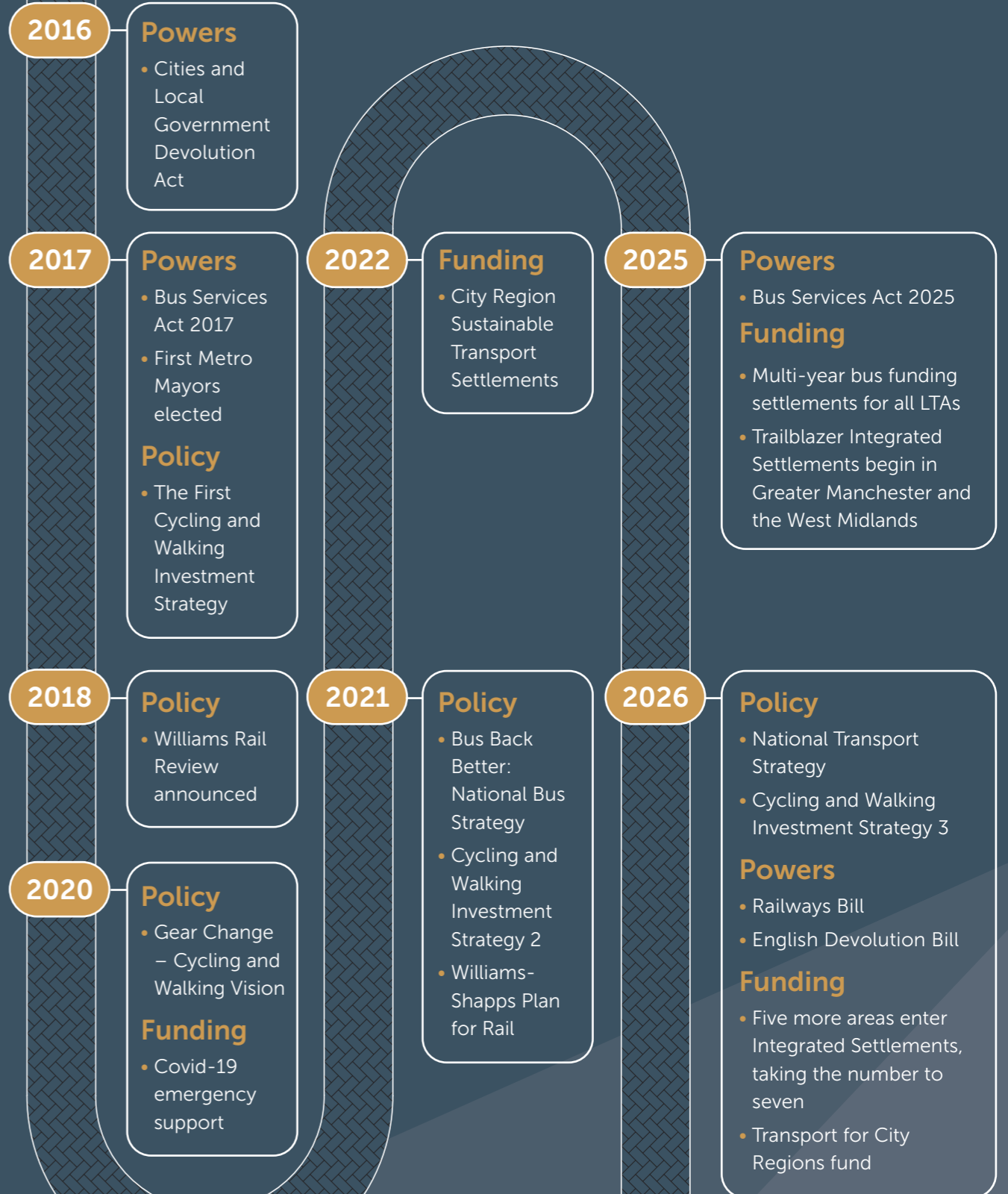


Congestion remains a challenge

Although the number of trips made as a motor vehicle driver or passenger is still nearly 10% down on pre-pandemic levels, congestion remains a challenge in our city regions⁵. The average speed on local authority 'A' Roads continued to fall last year. If we are to unlock the true economic potential of our city regions, we need to ensure that enough people can access them, with high capacity, reliable, public transport systems central to delivering this.



A DECADE OF TRANSFORMATION IN LOCAL TRANSPORT: 2016-2026



INTRODUCTION

Public transport has undergone a decade of change. After many years of relatively predictable, but often declining travel patterns, a series of major events have shaped how, why, and when people travel, in ways that few could have anticipated ten years ago.

Some of these changes, such as the Covid-19 pandemic, created unpredicted disruption, changing long-term trends and leaving considerable uncertainty about how and when patronage would recover.

Now extensive legislative, policy and funding reforms are starting to drive a more deliberate and structured change in how public transport is planned and delivered. While it will take time for these interventions to be fully reflected in local transport outcomes, together they offer reasons to be optimistic. They position local leaders with greater powers to shape their transport networks, supported by more stable long-term revenue and capital funding.

Over the last year, travel trends have started to stabilise. However, there are still examples of growth, especially across heavy and light rail networks. In areas where devolved powers have been implemented, changes are beginning to bear fruit. In Greater Manchester, for example, bus patronage has increased at a pace that stands out against otherwise flattening national trends.

In this report, we examine travel trends and the economic context across the Urban Transport Group's Principal Member areas. We then explore how devolution is beginning to deliver tangible outcomes, before looking in detail at how travel trends have evolved over time, exploring the different patterns by mode. Although our membership has evolved to encompass wider geographies, we will collectively talk about the largest cities and their surrounding regions, or the largest city regions.

The Urban Transport Group has members in the devolved nations of Scotland, Wales and Northern Ireland, as well as other smaller urban areas in England. This report focuses on our Principal Members, which are the largest English city regions and Transport for Wales. Transport for Wales is not included in the initial analysis on changing travel trends as comparative data to the English city regions does not exist.

OUR GROWING CITY REGIONS

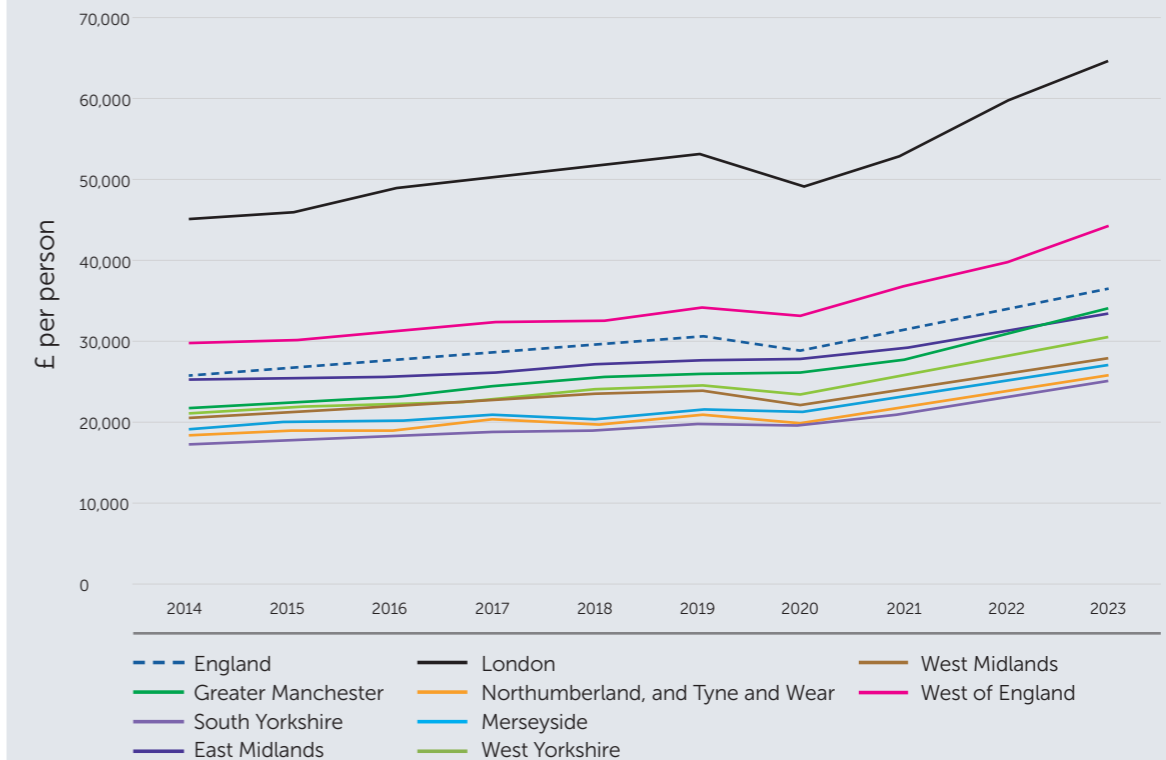
Our city regions are growing. For many years Britain has faced a persistent productivity challenge, where the largest city regions have underperformed compared to international counterparts. Across much of Europe, city productivity typically rises with population yet, London aside, this pattern has not held true for UK cities⁶.

However, recent economic data shows encouraging signs that our cities and wider city region economies are beginning to strengthen.

Over the past decade, England has seen a 40% growth in GVA per person. Although most city regions still fall below the England average - only London and the West of England currently exceed it - six city regions have narrowed the gap over the last ten years⁷.

GVA per person in England and Combined Authorities

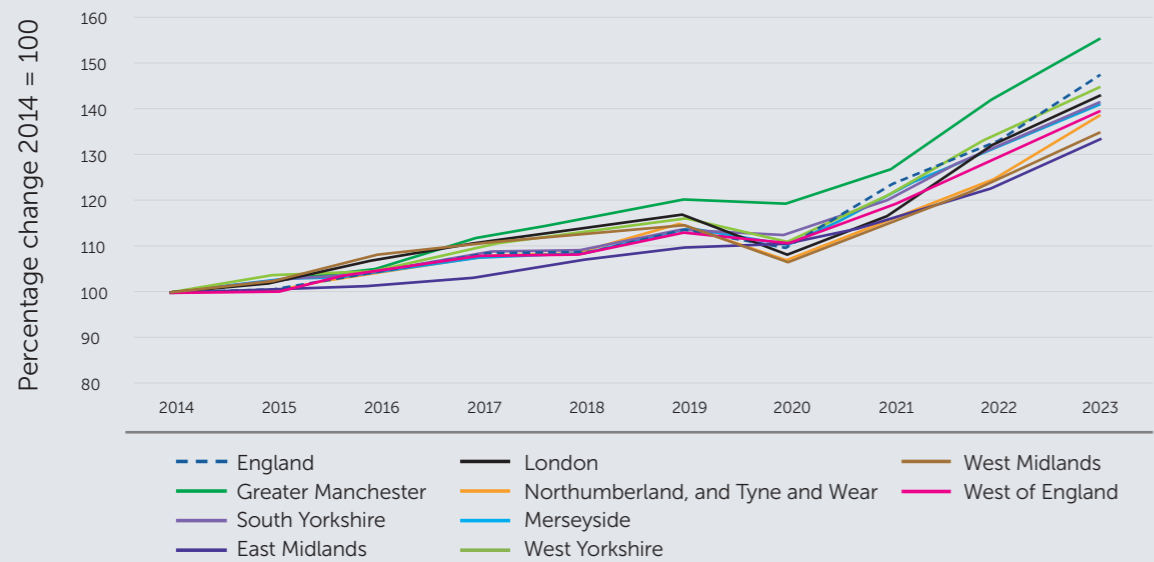
Source – ONS Statistics, Regional Gross Value Added (balanced) per head and income components



The growth in English city regions indicates positive momentum and suggests that long-term efforts to support urban economic growth are starting to bear fruit. What is more, this growth has accelerated in recent years as the chart below shows.

Change in GVA per person in England and by Combined Authority over the past decade (Indexed to 2014)

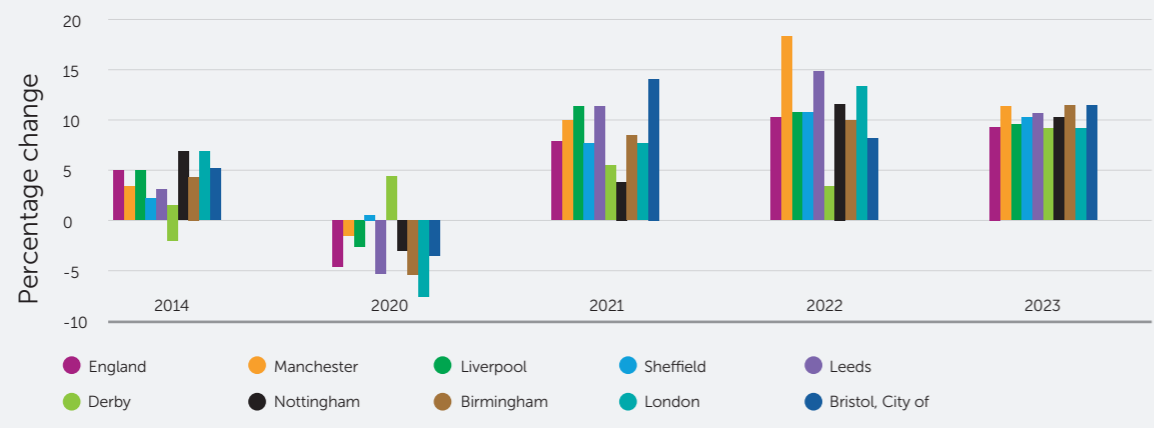
Source – ONS Statistics, Regional Gross Value Added (balanced) per head and income components



Focusing now on the key cities within the UTG network, back in 2014, London was the only key city in the UTG network growing faster than the England average. All other cities were continuing to fall further behind. However, in the most recent year (2023), every key city grew at or above the national average. This marks a meaningful shift, suggesting that our cities' economies are beginning to accelerate and play a stronger role in driving their wider regional economies forward.

Gross value added annual growth rates in England the key cities

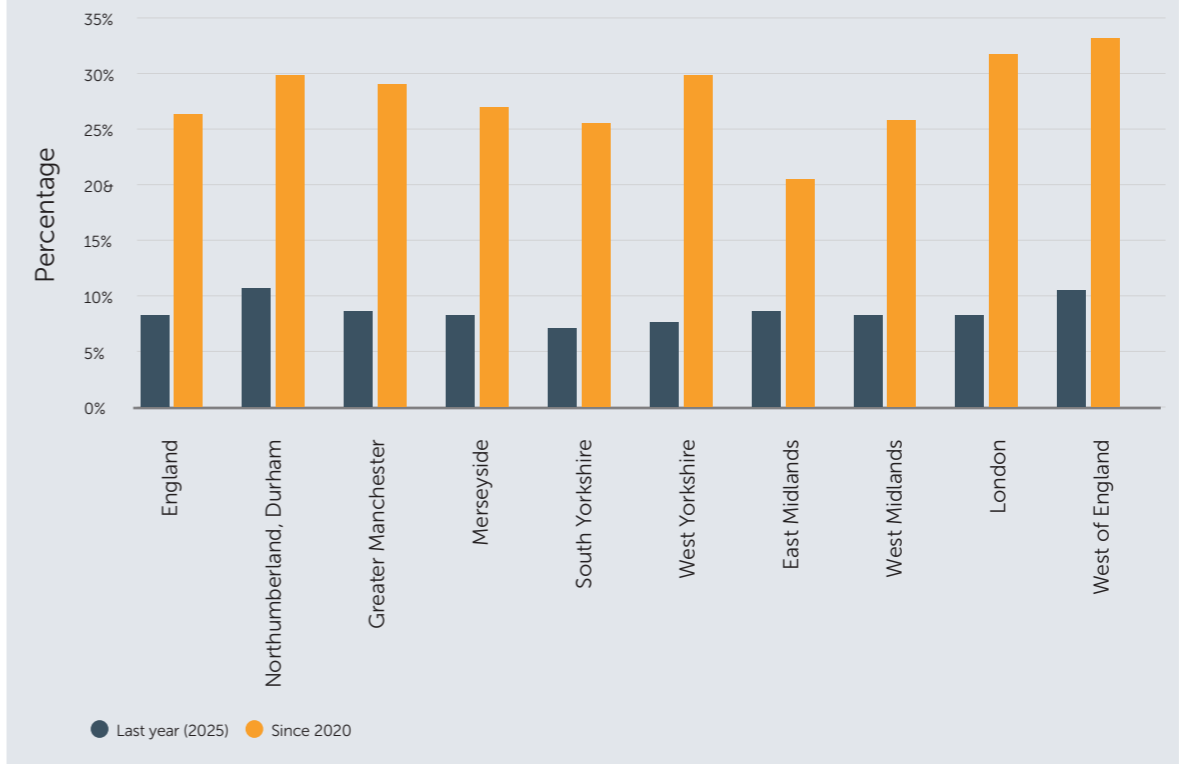
Source – ONS Statistics, Regional Gross Value Added (balanced) per head and income components



This growth is reflected across the wider city regions. Since the Covid-19 pandemic, seven of the city regions have grown at or above the national average. Looking at the most recent year, all but South Yorkshire and the East Midlands are on or above the national average.

Growth in GVA per person in the most recent year and since 2020 for England and the Combined Authorities

Source – ONS Statistics, Regional Gross Value Added (balanced) per head and income components



Our city regions hold vast, untapped economic potential. As engines of growth, they sit at the heart of the mission to strengthen the national economy. If the current positive trends can be sustained, these cities and their wider regions are well positioned to drive national prosperity in the years ahead. This will be central in helping to overcome the significant challenges of deprivation and inequalities that exist across urban areas in England.

Recent analysis by the Resolution Foundation⁸ found that limitations in transport networks were a barrier in enabling cities to continue to grow. Better connectivity within and between urban areas is essential for enabling skilled workers to access high value jobs. It is impossible to imagine the success of areas like Canary Wharf, for example, without the Underground or Salford Quays without the Metrolink. If our cities and city regions are to continue to grow, it is vital that transport links enable the dense clusters of jobs and expansion of housing supply to support them. Whilst some progress has been made, there is clearly more to do.

DEVOLUTION AS A DRIVER FOR CHANGE

Devolution has been, and will continue to be, central to addressing these challenges. By transferring powers and funding to local leaders, government is enabling Mayors and Combined Authorities to take a stronger role in shaping the future of their transport networks and wider economies.

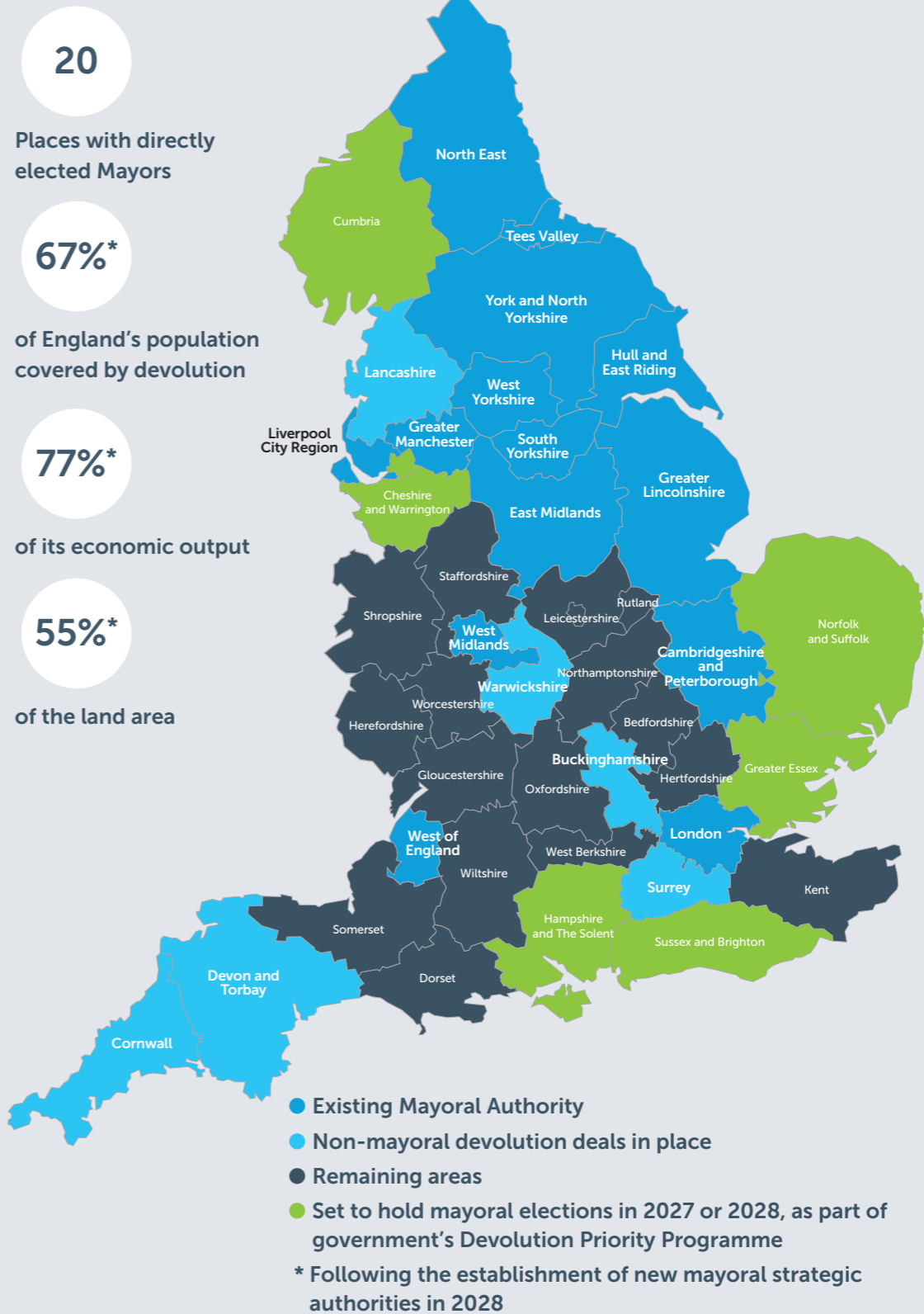
Long-term capital funding, through programmes such as the Transforming City Regions Fund, and the development of Local Growth Plans are beginning to provide city regions with the tools and certainty they need to plan effectively and deliver change at scale. This progress is set to continue as Integrated Settlements roll out, offering consolidated, flexible, multi-year funding arrangements

Devolution enables authorities to work more strategically, coordinating action and supporting integration of services and projects. The impact and success of this is starting to be seen across the most mature Mayoral Combined Authorities. Greater Manchester is at the forefront of demonstrating what can be achieved through devolved powers and local leadership, having fully franchised its bus network in January 2025. In the most recent year, bus patronage growth has accelerated to 11%, alongside significant growth on the light rail network, currently the only major light rail system to return to pre-pandemic patronage levels. These improvements demonstrate the impact of devolved decision making and targeted investment in public transport.

As devolution deepens and more powers are transferred to local leaders, we expect these positive trends will continue. As shown in the map, this change is happening rapidly, and by 2028, 67% of the population and 77% of English economic output will be in devolved areas.

The English Devolution White Paper, published in December 2024, and the English Devolution and Community Empowerment Bill have set out a new rationalised framework for local government and devolution of powers, responsibilities and funds. A growing number of city regions across the country are now benefiting from enhanced devolved powers and local control over funding, reflecting the increasing pace of change.

Mapping English devolution



WALES IN FOCUS

Wales has seen a significant growth in GVA since the Covid-19 pandemic, with GVA per person increasing by 23% since 2020. Although this is slightly below the English growth rate, the growth in the most recent year, 2023, matches the England rate. Cardiff and Swansea perform above the Welsh average, but have experienced slower growth rates since the Covid pandemic.

Wales is entering a pivotal phase in its transport and economic development, with major improvements to rail, bus and regional connectivity that reflect a broader shift toward deeper devolution and locally driven growth.

Major upgrades led by Transport for Wales (TfW), including over £1 billion for the South Wales Metro and an £800 million fleet of new trains, are already improving reliability, accessibility and passenger experience. Early successes, such as strong increases in rail ridership and the rapid uptake of pay-as-you-go smart ticketing at 95 stations, show how devolved decision-making can rapidly deliver passenger-centred improvements.

The Railways Bill will introduce a new Memorandum of Understanding between the UK and Welsh Governments, strengthening joint planning, funding alignment and accountability. This more formalised devolved structure is expected to support long-term economic development by ensuring rail planning better reflects Welsh priorities and regional needs.

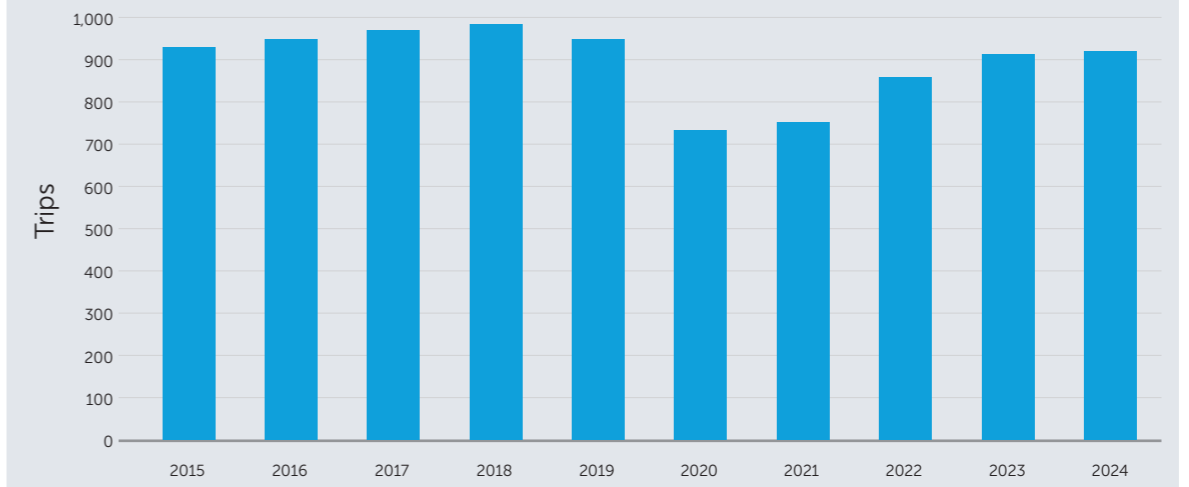
In common with English authorities, Wales is also moving ahead with bus franchising, which will allow TfW and local authorities to shape bus networks in line with local needs.

CHANGING TRAVEL PATTERNS

Travel patterns and the number of trips that we make have changed significantly in recent years, with the Covid-19 pandemic and subsequent recovery disrupting long-term trends. After a period of strong recovery, trip levels now appear to be stabilising. Although there was still growth in the most recent year, the 1% increase in the average trip rate equates to an additional 7 trips per person a year, (taking the average person to 922 trips). This is significantly lower than the 6% growth in 2023 (53 trips per person) and the 14% observed in 2022 (105 trips per person). Despite these years of growth, trip levels remain 64 trips per person below their pre-pandemic baseline.

The average number of trips per person per year, in England

Source – National Travel Survey NTS0101



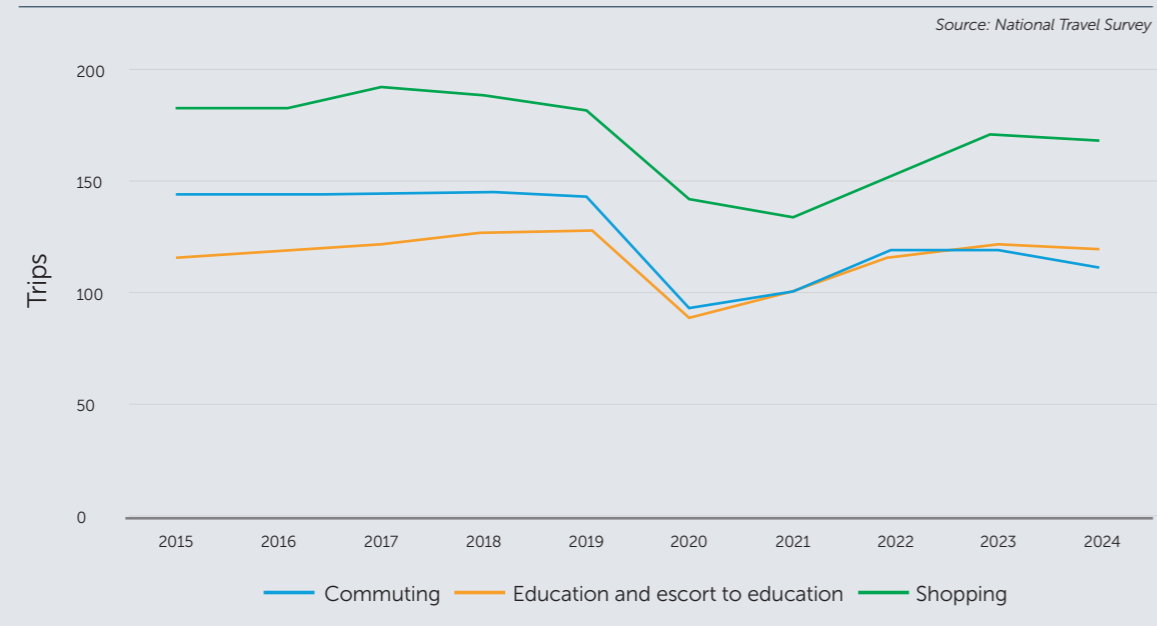
Focusing on the reasons people travel, there has been a small decline across several key public transport trip purposes in the most recent year.

Commuting trips fell from 117 trips per person in 2023 to 111 in 2024, a 5% decline. The rate of decline has also increased from the previous year where it only fell by 2 trips, a 2% decline. Although there was a growth in commuting following the pandemic, we are still 33 trips per person below the pre-pandemic high in 2019, meaning that we have lost almost one in three commuting trips.

Trips related to education and escort to education were broadly stable, with a slight growth of 3 trips in the last year (a rate of 2%). Escort to education has returned to its pre-pandemic level, while direct education trips remain lower at 24 trips per person, compared to 30 trips before the pandemic.

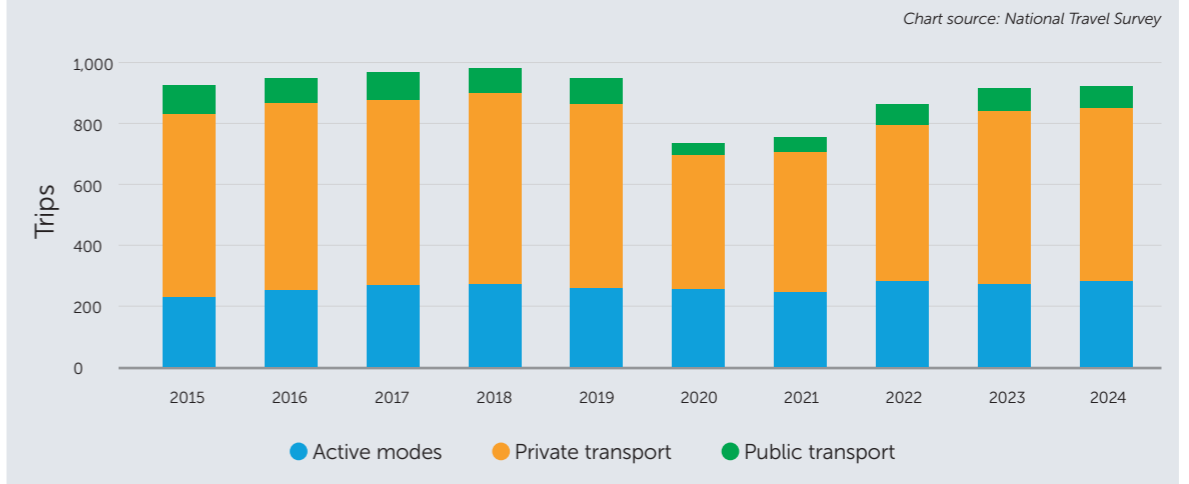
Shopping trips decreased by 2 trips per person in the last year, falling to 167 per person, a reduction of 1%. This marks the end of the post-pandemic recovery trend, suggesting trip levels have stabilised. Despite the recovery of shopping trips since the low of 2020, shopping trips remain 19 trips (10%) below pre-pandemic levels, down from 188 per person.

The average number of trips made by key trip purposes, in England



Despite the changes in trip rates, the overall mode share of public private, and active travel has remained largely stable in the last year.

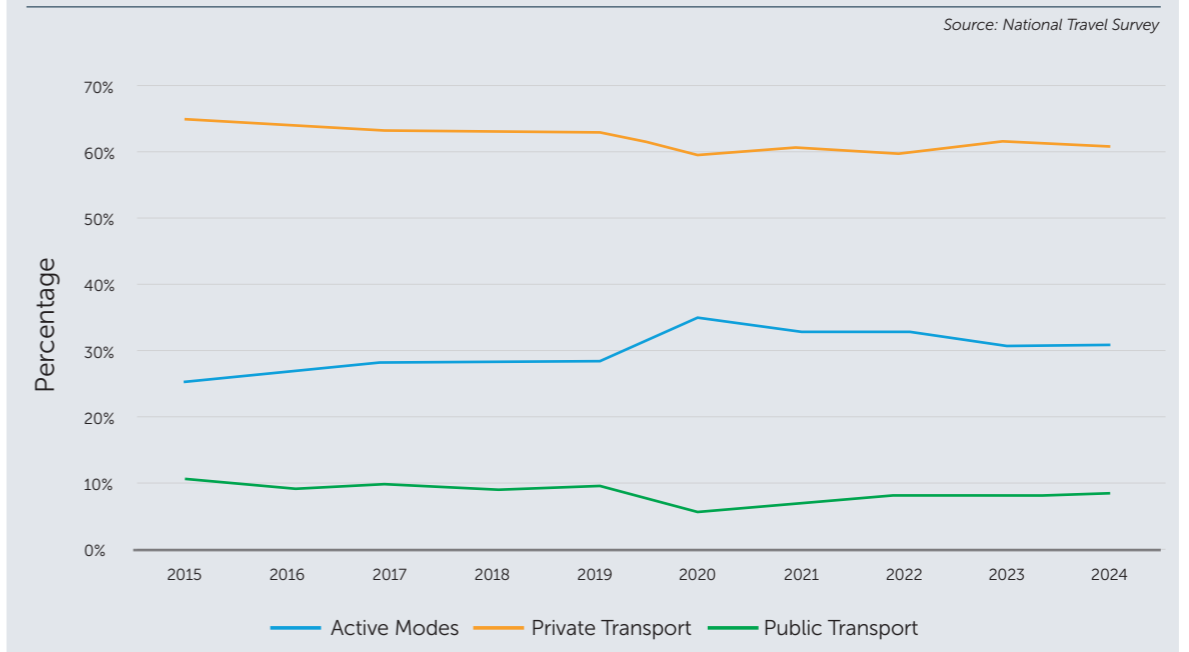
The average number of trips a person makes by active, private and public modes of transport, in England



Compared with 2019, public transport's mode share has decreased slightly, falling from 10% to 9%. The number of trips made by private transport modes remained stable in the most recent year, although the mode share fell slightly due to an increase in the overall number of trips. This saw the mode share of private transport fall from 62% to 61% in 2024.

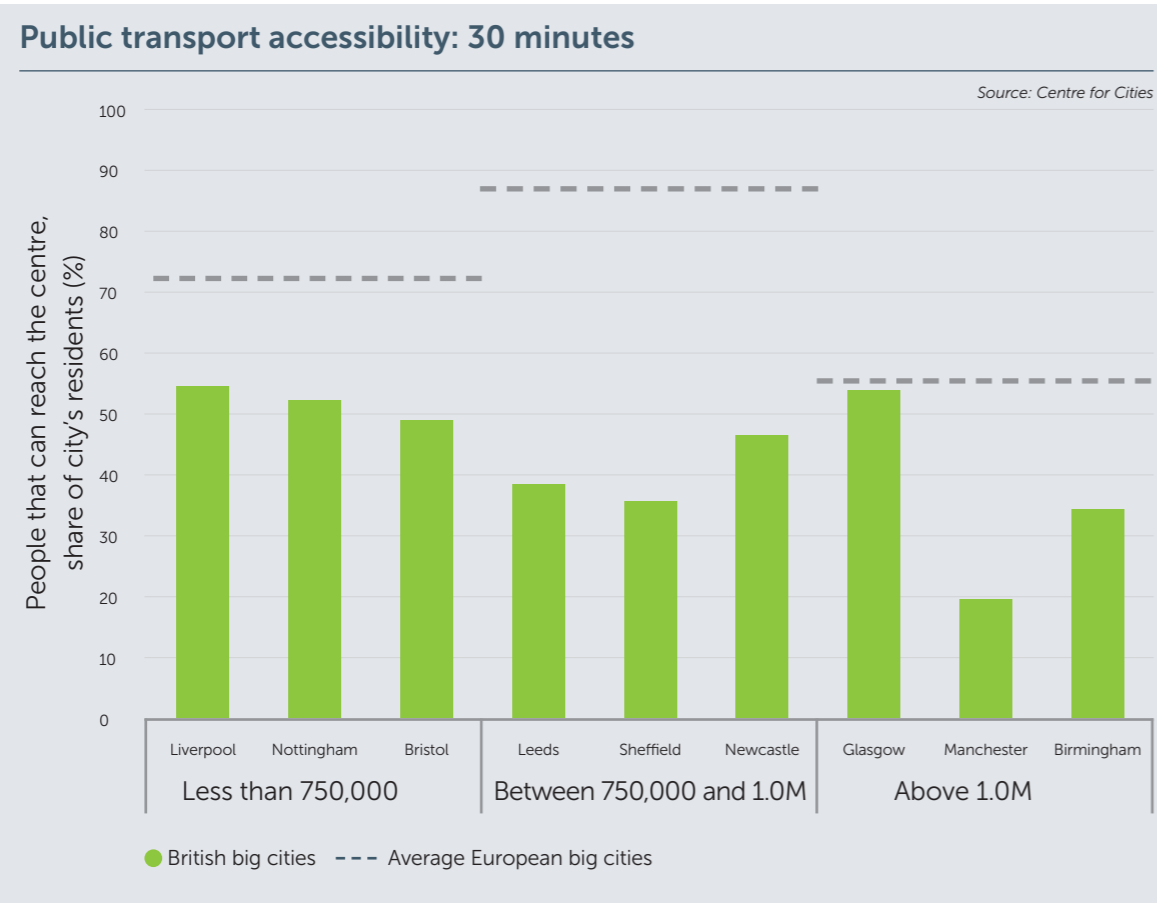
In contrast, active travel mode share has grown in 2024, now accounting for 30% of all trips. This is still below the mode share achieved during the pandemic, when government restrictions limited the trips that we could make, but is above the pre-pandemic mode share.

Percentage of trips made by private, public and active modes, in England



If we are to fully unlock the economies of our city regions we need to ensure that more people can travel by public and active transport modes into our city centres, within a reasonable commuting time. Road space in our cities is limited, so to support growing economies we need to ensure that more people can travel by public transport, increasing the number of people that we can transport into areas of high economic productivity.

As the graph below shows, British cities perform poorly in comparison to their European counterparts in terms of the percentage of people that can reach the city centre in under 30 minutes on public transport⁹.



Transport alone cannot deliver stronger economies, but it is a critical component of a well functioning urban system. If we are to unlock agglomeration benefits, as well as ensure that people have access to education and wider opportunities, we must ensure there is sufficient capacity to move people around our cities efficiently without contributing to the congestion that can stymie growth. Without reliable, high capacity public transport connections, our cities cannot continue to grow, compete, or operate effectively.

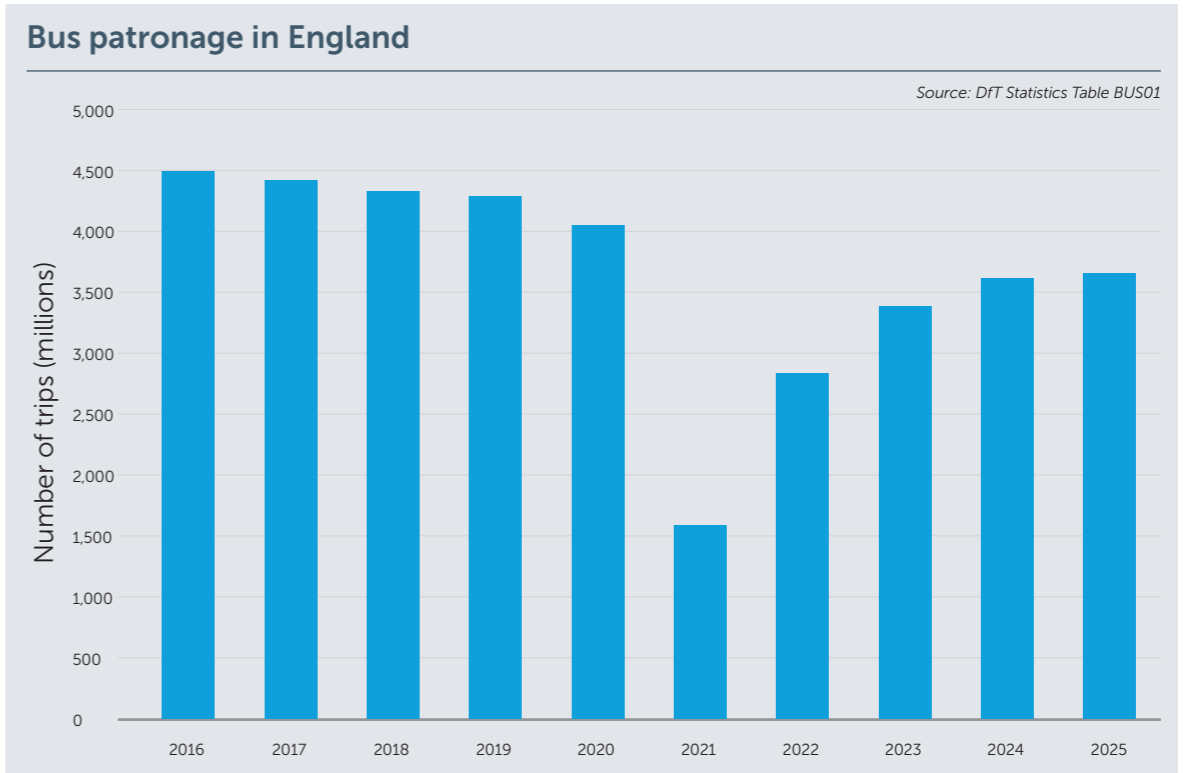
TRENDS BY MODE

Bus

The bus remains the backbone of public transport in England and has continued to recover from the artificially low patronage seen in 2020/21 during the Covid 19 pandemic.

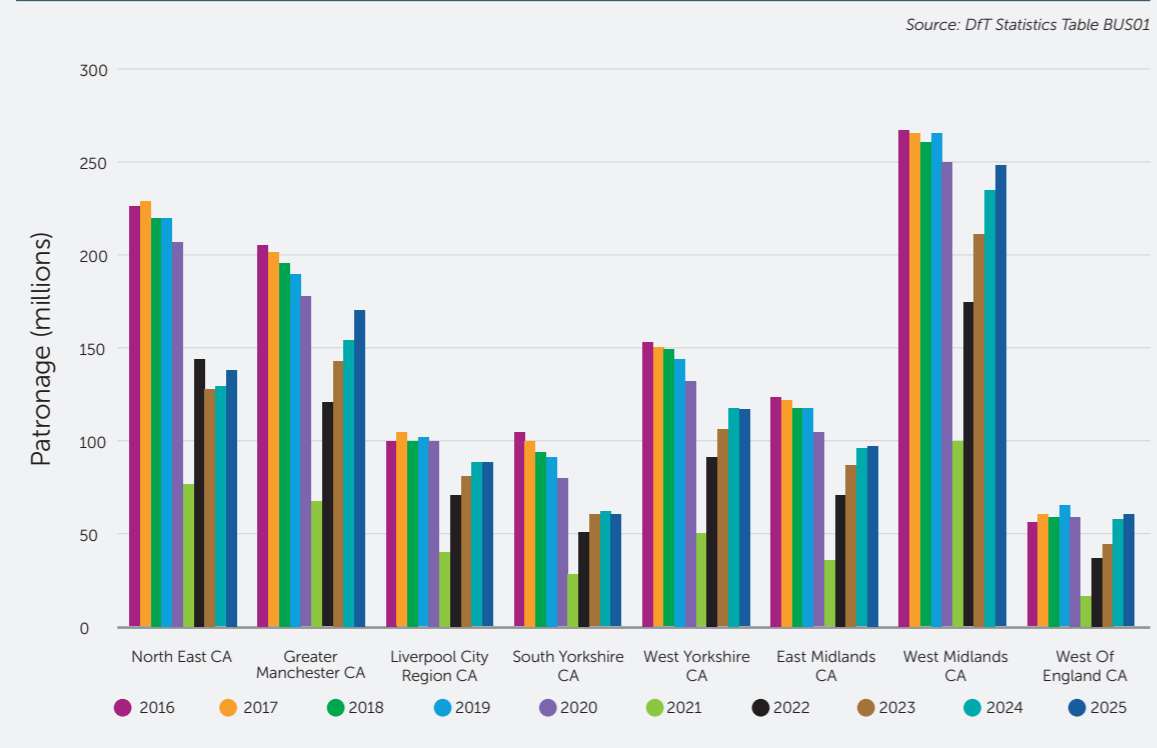
In 2024/25, bus patronage reached 3.6 billion journeys, an increase of 0.04 billion on the previous year. While this continues the post Covid recovery trend, the pace of growth has slowed significantly to just 1%, compared with 7% in 2023/24 and 19% in 2022/23. Although this deceleration was anticipated, it suggests that patronage levels may now be approaching a more stable state.

More recent local data indicates that this growth may have already stalled in some places, raising the possibility that next year's figures could show a return to long-standing patterns of decline observed pre-pandemic.



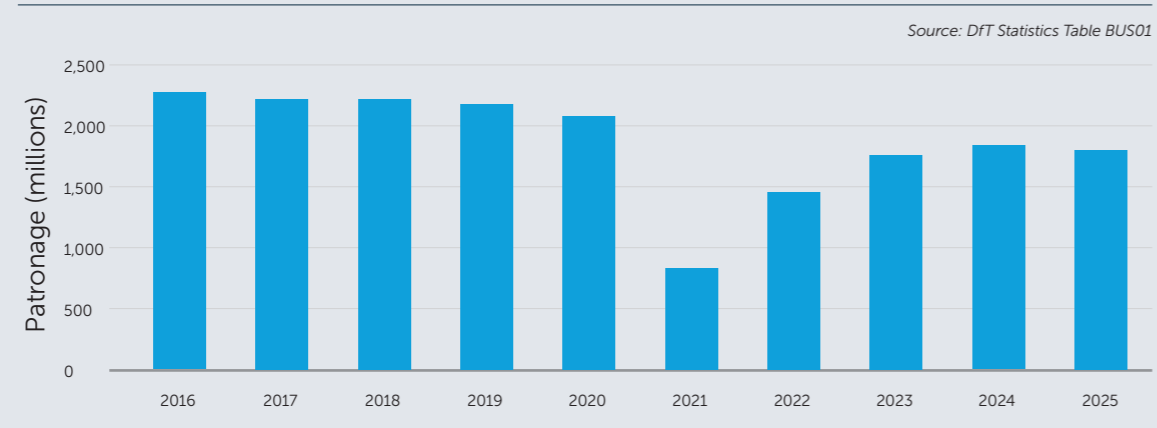
Focusing on UTG's Principal Members, the majority saw bus patronage grow in the last year. For the English city regions, growth exceeded the national average of 1% in most cases. Greater Manchester led the way with 11% growth in the last year, coinciding with bus services coming under local control. There was also significant growth of 6% in the North East and West of England, as well as 5% growth in the West Midlands. Greater Manchester, West Midlands and the West of England are all now close to pre-pandemic levels of bus patronage.

Bus patronage in the Combined Authorities



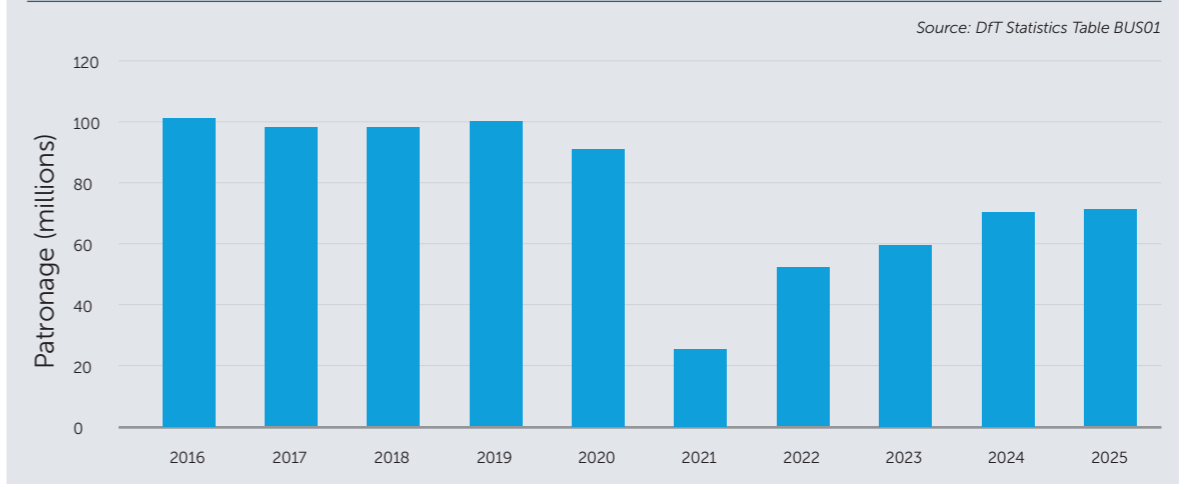
Bus patronage in London declined over the past year, falling by 1%. This contrasts with growth of 4% in the previous year. Bus patronage in London has yet to recover to pre-pandemic levels.

Bus patronage in London



Wales saw bus patronage grow 1% compared to the previous year, mirroring the trend seen in England. This is a significant slowdown on the 16% growth recorded in 2024, suggesting that bus travel patterns are starting to stabilise.

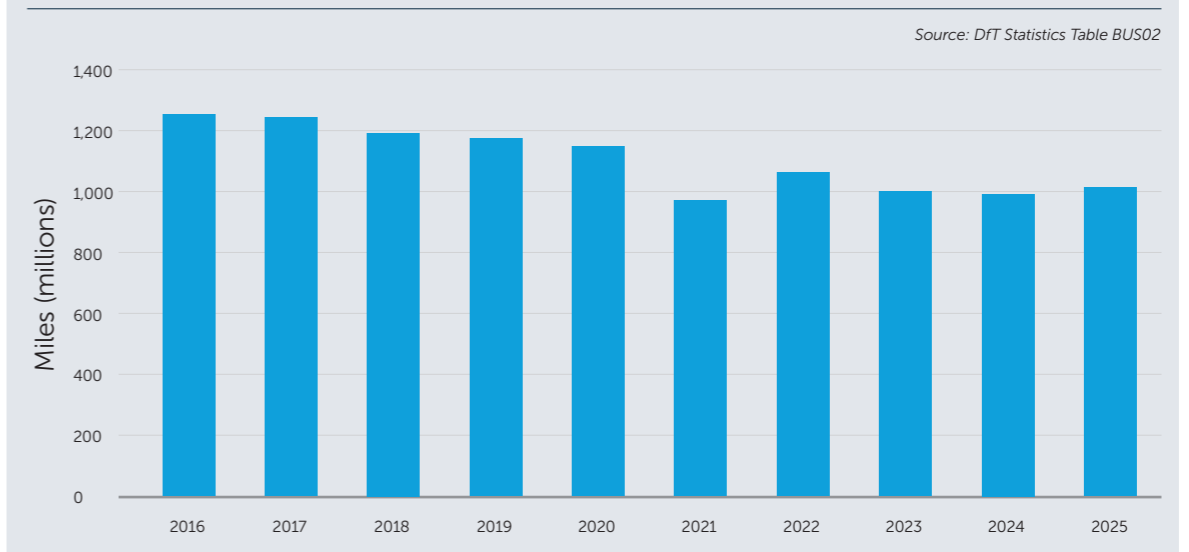
Bus patronage in Wales



Focusing on bus vehicle miles (an indicator of the level of bus service that is provided across the country) there has been a 19% reduction over the past decade. While a decline in service miles is not always negative, as networks can be rationalised and over bussing on key corridors addressed, the scale of this reduction means that one in every five bus miles operated ten years ago is no longer running.

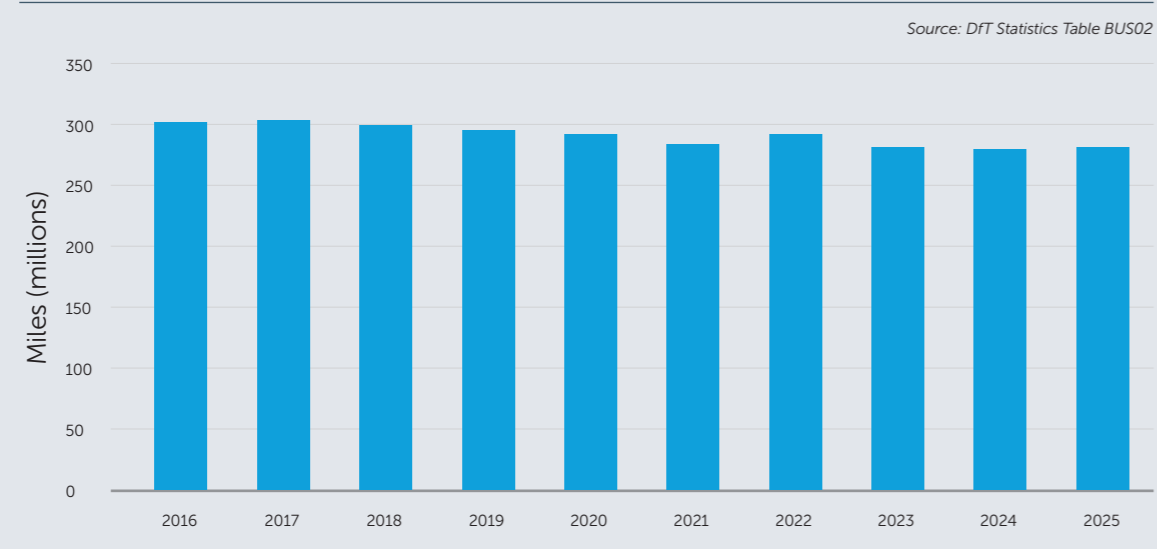
Following the artificial reduction in services during the Covid 19 restrictions, bus vehicle miles have since increased, with the 2025 figure rising 2% compared with the previous year. This represents a relatively stable picture over the past three years but is still significantly below the pre-pandemic levels.

Bus vehicle miles in England



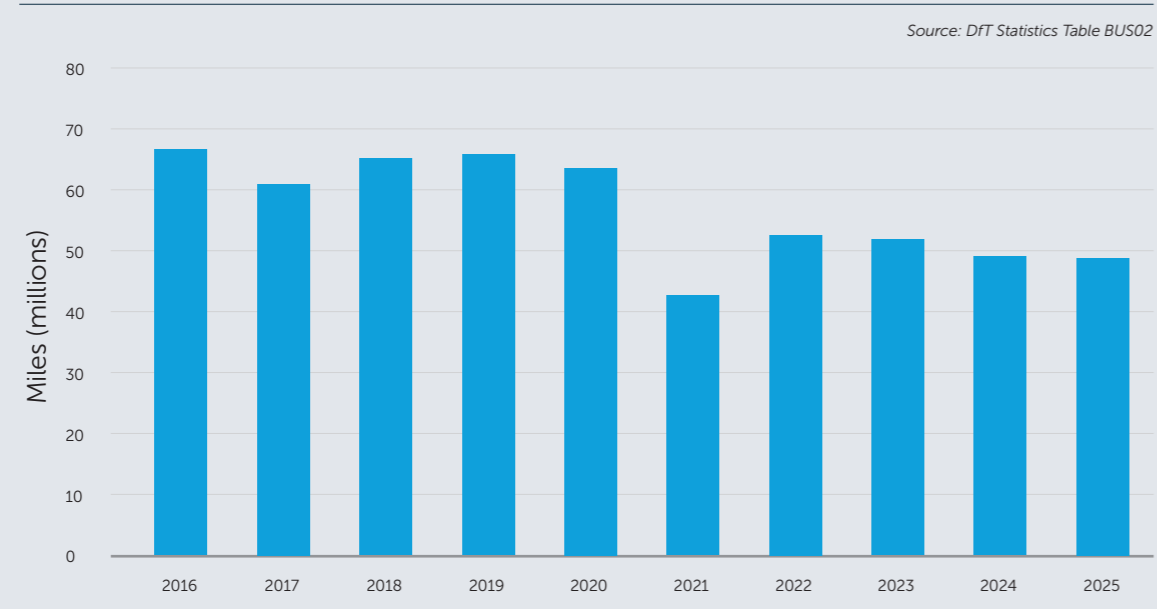
Bus vehicle miles in London have remained comparatively stable over the past decade, although they have still experienced a steady overall decline of around 7%. However, services returned to growth for the first time since 2022, with a 1% increase in 2025.

Bus vehicle miles in London



Bus vehicle miles in Wales have decreased at a faster rate than the England average, reducing by 27% in the last decade (compared to 19% in England). Although vehicle miles have stabilised in the most recent year, they are significantly below the pre-Covid levels.

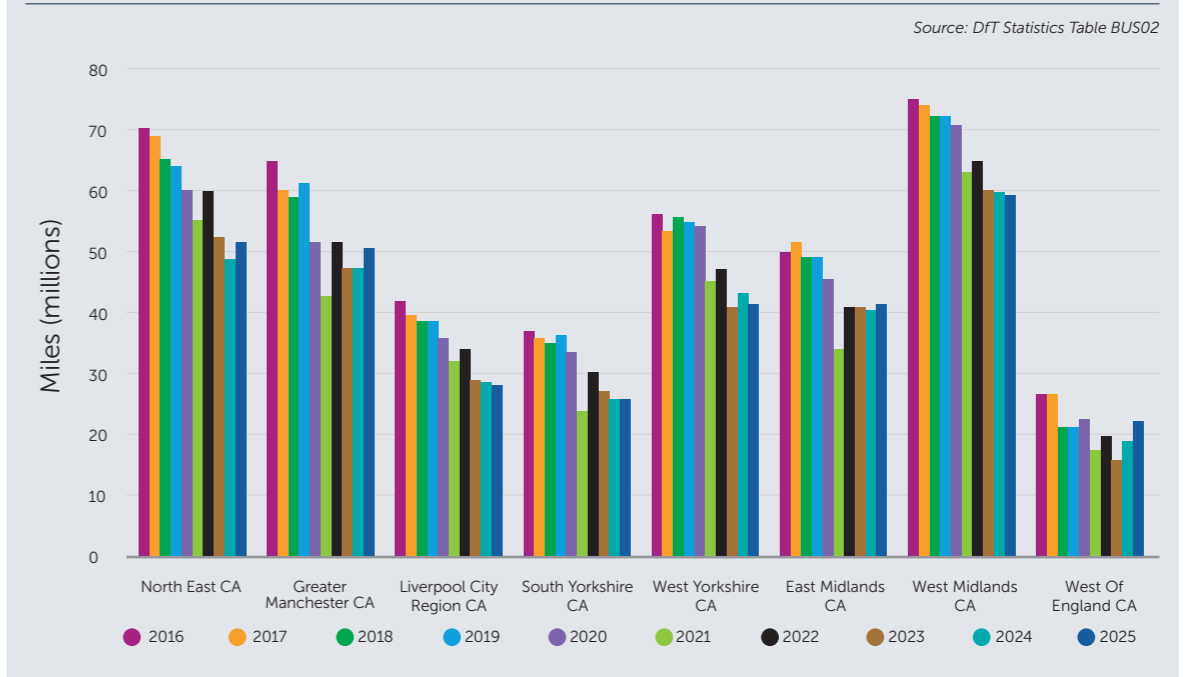
Bus vehicle miles in Wales



Looking at the Combined Authority level, the most recent year paints a more positive picture than at the national level, with growth in bus vehicle miles in Greater Manchester (7%), the North East (6%), the East Midlands (3%), and the West of England (18%). For UTG members, this averages out to a 3% growth in the most recent year, and a 2% growth over 5 years.

However, over the past decade service miles are down 24% across UTG member areas in England, showing that a quarter of the bus network has been lost. Despite positive figures over recent years, this decline is worse than the England average.

Bus vehicle miles across the Combined Authorities



Summary

Across much of the country, the post-pandemic recovery in bus use is beginning to slow, with some areas now experiencing patronage decline for the first time since Covid-19.

Despite the slowing of growth, there are still strong reasons for optimism. New regulatory powers and greater local control are giving authorities more tools to reshape their networks and respond to local needs. Greater Manchester offers a clear example of what is possible: its franchised network is growing in patronage and mileage, bucking the national trend and demonstrating the potential of reform to revitalise local bus services. As the new powers in the Bus Services Act come in, more areas will benefit from greater control of their bus networks, whether this be through franchising or the changes contained within the Enhanced Partnership review. This provides hope that bus provision can be improved across the country.

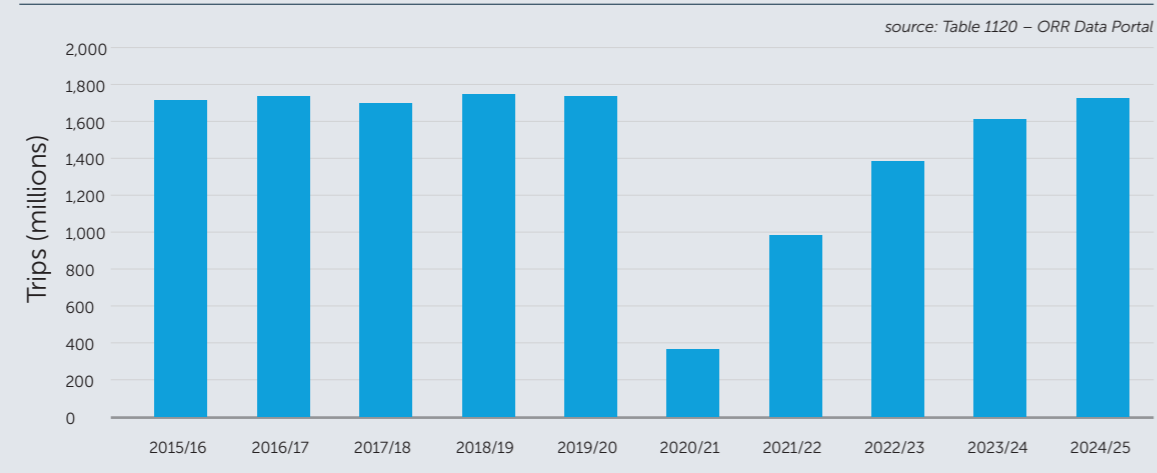
Heavy and light rail

Heavy rail

Rail patronage continues to grow, increasing by 7% in 2024/25 compared to the previous year. However, this represents a marked slowdown compared with the 16% rise recorded in 2023/24. The next couple of years will be important in understanding whether the rail sector remains in growth, or whether trends are starting to stabilise after the post-pandemic recovery as observed in bus.

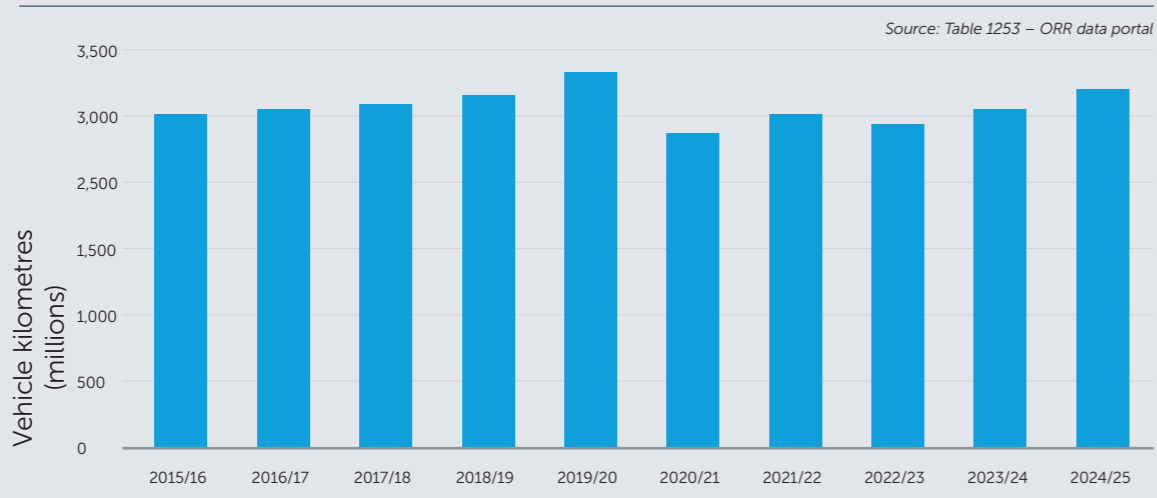
This latest increase has brought rail patronage back to pre-pandemic levels, an impressive recovery given that overall trip volumes across all modes remain below their 2019 baseline.

Heavy rail passenger journeys in Great Britain



Although rail patronage has now returned to pre-Covid 19 levels, the level of service, whilst increasing, has yet to reach this baseline. This highlights an important risk: if service levels do not keep pace with growing demand, constrained capacity could stall recent gains in passenger numbers. Maintaining adequate service provision will therefore be critical to supporting long-term, sustainable growth.

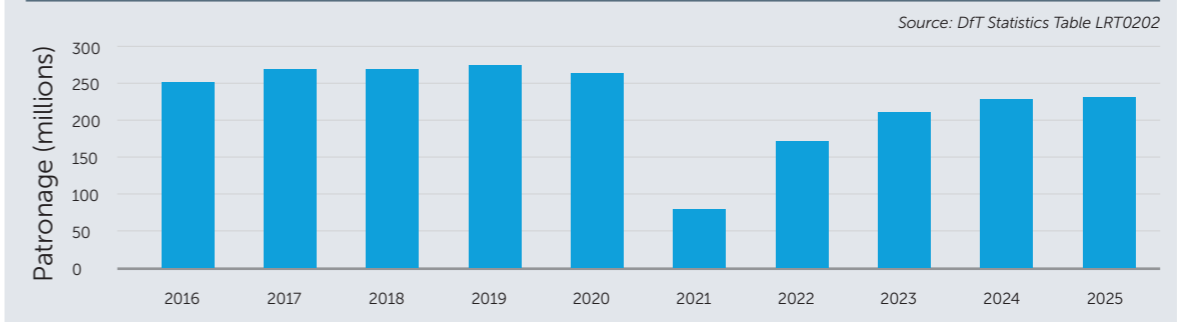
Passenger vehicle kilometres in Great Britain



Light rail

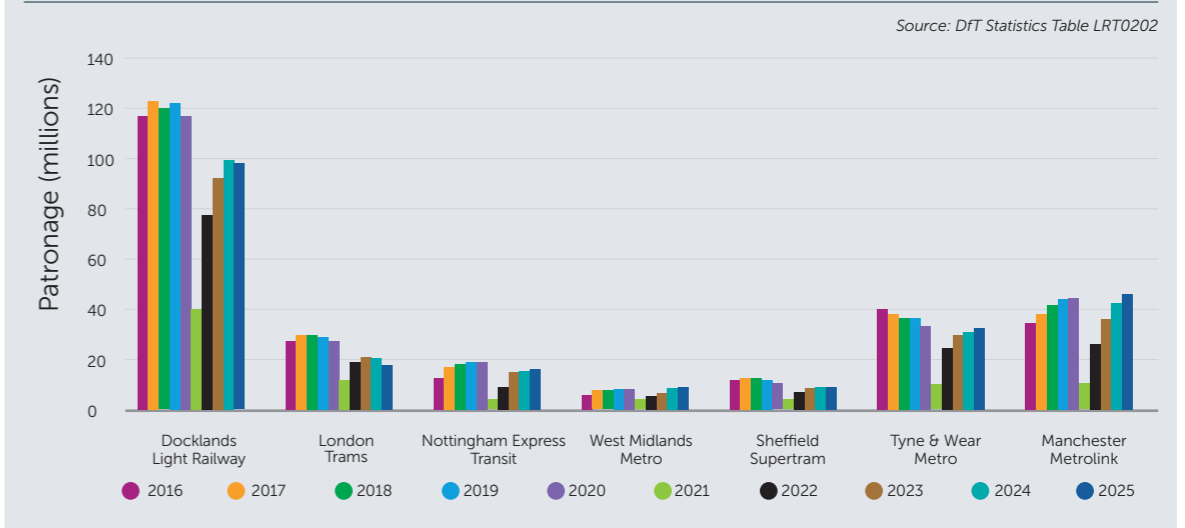
Light rail has seen a strong patronage recovery since the pandemic, although growth has flattened off in the most recent year. Despite this strong growth, the main networks in England are still around 10% below their pre-pandemic levels of patronage.

Light rail patronage in England



The national trend does not play out evenly across all networks, with systems in Nottingham, the West Midlands, Sheffield, Tyne and Wear, and Greater Manchester, still seeing growth in the most recent year. Notably, Greater Manchester has become the first network to surpass its pre-pandemic patronage figures. If growth is to continue, other networks could start to achieve this milestone in the coming years.

Light rail patronage by network



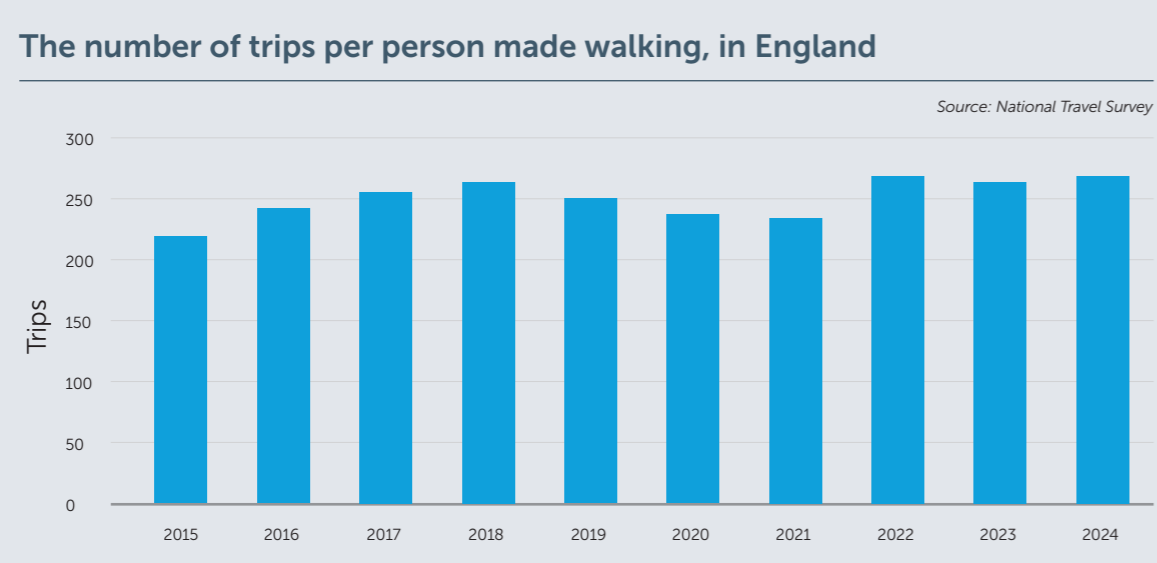
Summary

Both heavy and light rail networks have continued to see growth in the most recent year, although the light rail growth is not consistent across all networks. Heavy rail patronage is now back to pre-Covid levels, a significant achievement considering that overall trip levels are still below where they were.

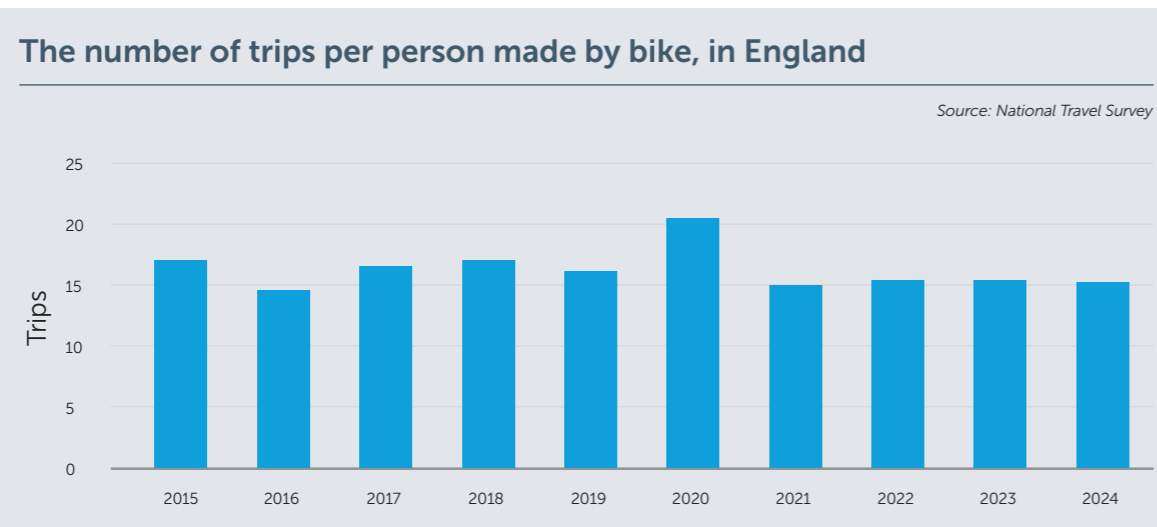
Greater Manchester has become the first light rail network to reach and exceed its pre-pandemic patronage levels, with other networks also approaching this milestone. This is a remarkable achievement considering that overall trip levels are still down.

Active travel

In 2024, the average person in England made 267 trips by walking, an increase of 4 trips on the previous year. This takes trip numbers back up to the 2022 level, the joint highest number reported in the last decade.



Cycling trips, however, remained flat, with the average person making 15 trips a year for the fourth year in a row. This is below the levels seen in 2020, influenced by people making more local trips due to Covid restrictions.



Whilst cycling trips overall are flat, evidence suggests that where there has been investment in high quality infrastructure, trip numbers grow in response. London has seen a 43% increase in cycling levels since 2019 and 12% in the last year alone, with the expanding cycle network continuing to attract more riders¹⁰.

Summary

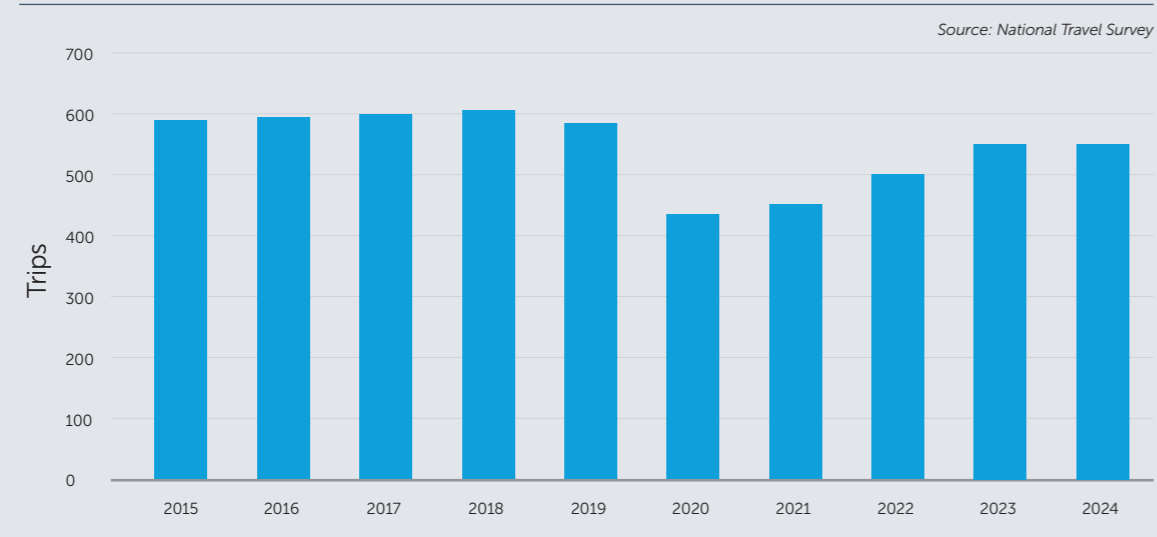
The number of trips made by active modes continues to increase each year, with trips rates above where they were a decade ago. Much of this growth is down to an increase in walking trips, with cycling trips continuing to flatline at the national level.

There is still much that can be done to ensure that cycling and walking are the natural choice for short journeys, and evidence suggests that where we improve infrastructure, the number of trips increases. Cycling and walking trips are also vital for enabling public transport journeys, with nearly all trips starting and/or ending with an active mode. Ensuring those connections are practical and attractive is important to building public transport patronage more generally.

Private transport

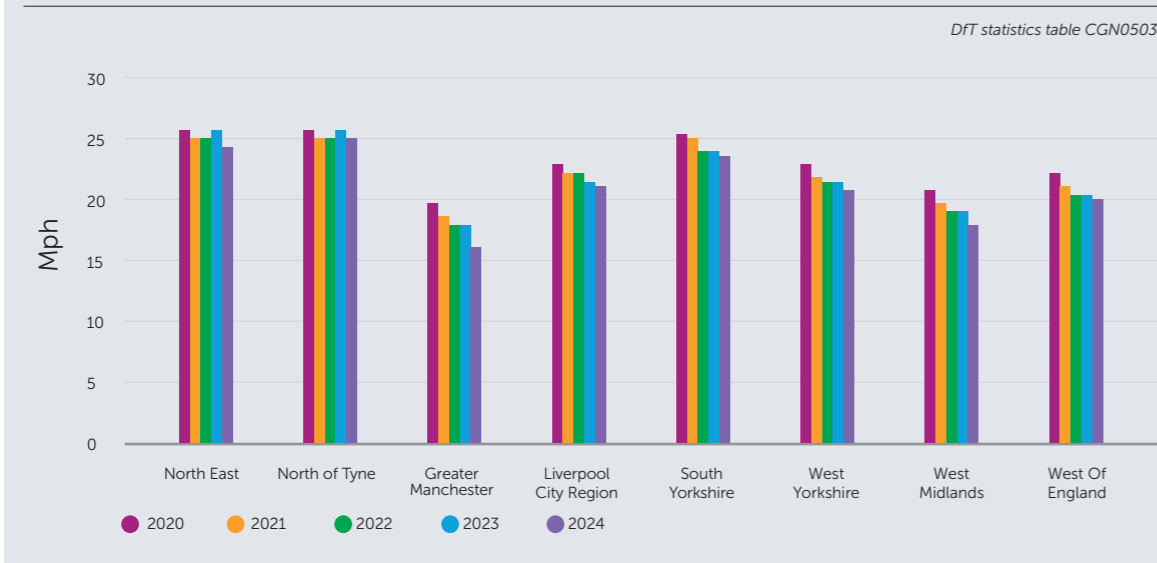
Trips as a car, van or motorbike driver/passenger continue to be the dominant form of transport, with 549 trips per person in 2024 (this compares to 356 by active or public transport modes). This is a slight decrease of 1 trip per person on the 2023 level. Private vehicle trips are still considerably down on the pre-pandemic high of 604 per person in 2018.

The average number of trips as a car or van driver, passenger or motorcycle rider, in England



Despite the reduction in trips post-pandemic, the average speed on local 'A' roads in Combined Authority areas continues to fall each year. Given that we are unable to expand road space in many of our city centres, this highlights the urgency of improving high-capacity public transport links, allowing more people to access our city centres in an efficient and timely way.

Average speed on local A roads by Combined Authority



Summary

Traffic levels, congestion, and road speeds continue to be a challenge in the main urban areas, with average speeds on A-roads continuing to fall. Whilst this is not automatically a negative (policy choices to reduce speed limits have wider positive impacts such as on road safety), we need to ensure that enough people can access our city centres in reasonable journey times. Increasing reliable access through public transport will be key to furthering growth in our city regions.

REFERENCES

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- 6 [Tom Forth, city size and productivity.](#)
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- 10 [Transport for London, New TfL data shows the number of daily cycling journeys in London has risen by 43 per cent since 2019](#)



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