

TSUG

Transport Statistics Users Group

Monthly Review: December 2017

This month's review has shown that individual drivers can make a CO₂ savings by using more eco-friendly modes. October 2017 became the seventh consecutive month of declining car sales in UK. MSAs User Survey in England showed 2/3 travelling for leisure, 18% for business and 7% were commuters. The rate of unlicensed vehicles on the road was higher in 2017 than in 2015. Year 2017 is the record year for the Port of Baltimore. Letter to the Editor has been continued and also we have got Kit Mitchell's Statistics Digest

Dr Shanta Bir Singh Tuladhar and Andrew Sharp

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Dates of the next TSUG seminars

Date	Venue	Topic
Wed 13.12.2017	TfL	Walking and Landuse

The seminars can be booked through the TSUG website at www.tsug.org.uk/seminars.php

Statistics Digest

This digest lists major sets of statistics that have been released recently or which are due to be released. Regular monthly and quarterly releases are not included. The web links given allow free downloads of the documents cited.

Recent releases from Department for Transport

Recent releases from Department for Transport	
2 Nov	Renewable Transport Fuel Obligation: Year 9 (2016 to 2017) report 5 (15 April 2016 to 14 April 2017 supply) https://www.gov.uk/government/statistics/biofuel-statistics-year-9-2016-to-2017-report-5
2 Nov	Renewable Transport Fuel Obligation: Year 10 (2017 to 2018) report 1 (15 April 2017 to 14 April 2018 supply) https://www.gov.uk/government/statistics/biofuel-statistics-year-10-2017-to-2018-report-1
16 Nov	Vehicle excise duty evasion statistics: 2017 https://www.gov.uk/government/statistics/vehicle-excise-duty-evasion-statistics-2017
22 Nov	Final sea passenger statistics: 2016 https://www.gov.uk/government/statistics/final-sea-passenger-statistics-2016
23 Nov	Transport Statistics Great Britain: 2017 https://www.gov.uk/government/statistics/transport-statistics-great-britain-2017
29 Nov	Rail fact sheet https://www.gov.uk/government/collections/rail-statistics
30 Nov	Travel time measures for the strategic road network and local 'A' roads: October 2016 to September 2017 https://www.gov.uk/government/collections/road-congestion-and-reliability-statistics
30 Nov	Provisional road traffic estimates, Great Britain: October 2016 to September 2017 https://www.gov.uk/government/collections/road-traffic-statistics

Forthcoming releases from Department for Transport

2 Nov	Renewable Transport Fuel Obligation: Year 9 (2016 to 2017) report 5 (15 April 2016 to 14 April 2017 supply) https://www.gov.uk/government/collections/biofuels-statistics
2 Nov	Renewable Transport Fuel Obligation: Year 10 (2017 to 2018) report 1 (15 April 2017 to 14 April 2018 supply) https://www.gov.uk/government/collections/biofuels-statistics
16 Nov	Vehicle excise duty evasion statistics: 2017 https://www.gov.uk/government/collections/vehicles-statistics

Forthcoming releases from Department for Transport

22 Nov		Final sea passenger statistics: 2016 https://www.gov.uk/government/collections/maritime-and-shipping-statistics
23 Nov		Transport Statistics Great Britain: 2017 https://www.gov.uk/government/collections/transport-statistics-great-britain
13 Dec		Domestic waterborne freight: 2016 https://www.gov.uk/government/collections/maritime-and-shipping-statistics
14 Dec		Annual bus statistics: year ending, March 2017 https://www.gov.uk/government/collections/bus-statistics
14 Dec		Concessionary travel statistics: year ending, March 2017 https://www.gov.uk/government/collections/bus-statistics
19 Dec		National Travel Survey factsheet - Comparing methods of collecting attitude data https://www.gov.uk/government/collections/national-travel-survey-statistics
11 2018	Jan	Road freight statistics: July 2016 to June 2017 https://www.gov.uk/government/collections/road-freight-domestic-and-international-statistics
18 2018	Jan	18 Jan 2018 Walking and cycling in England: 2015 to 2016 https://www.gov.uk/government/collections/walking-and-cycling-statistics
18 2018	Jan	National travel survey: 2016 (part 2) https://www.gov.uk/government/collections/national-travel-survey-statistics

Releases from Office for National Statistics

8 Nov		Families and households in the UK: 2017 https://www.ons.gov.uk/releases/familiesandhouseholdsintheuk2017
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Seminar Write-up

Members can find past seminar slides here: http://www.tsug.org.uk/past_seminars.php

“From all Angles: Perspectives on Bus Statistics” 15 Nov 2017

Peter White, Emeritus Professor at the University of Westminster and author of the textbook “Public transport: its planning, management and operation”, spoke on “Monitoring the Bus Services Act 2017”. He started by showing trends in bus services since de-regulation and privatisation following the 1985 Transport Act. From 1985/86 until 1999/2000 there was a sharp reduction of about 45% in real costs per bus-km run and a large increase in the bus-km run, both in London and elsewhere. Ridership fell in the de-regulated regions, but not in London. Between 2000 and 2014, cost per bus-km increased by 30%, and there was greater emphasis on service quality. Ridership continued to fall outside London, despite an increase due to the extension of concessionary travel. Data on ridership and revenue are aggregated by DfT to local authority level.

Competition probably did more to drive down costs than improve service. Tyne and Wear proposed a quality contract under the 2008 Transport Act, but the proposal was rejected.

The approach of the Bus Services Act 2017 is very different to that of the Competition Commission review of 2011, giving greater powers to Combined
TSUG Review

Authorities, notably for franchising. This provides for schemes broadly on London lines with authorities planning the network. The franchising authority has powers to obtain data on trips, fares, revenue and bus-km run for a five year period before a franchise is proposed. If franchising is to be monitored, large provincial urban areas would provide better controls than London. Monitoring should include network coverage, ticketing and boarding time, reliability and user perceptions.

Advanced Quality Partnerships are permitted by the 2017 Act. These can set service standards and maximum fares, and would not necessarily require infrastructure improvements. Enhanced Partnerships with the agreement of operators would allow greater coordination between operators and would look similar to a franchise to users. In each case, monitoring requirements would be similar to those for franchises.

In the discussion of this presentation, David Metz (UCL) asked whether the prospects are good for growth in patronage as a result of the new legislation? Professor White considered that growth prospects are good, where franchising arrangements take shape, but are not so positive elsewhere.

John Cartledge (London Travel Watch) thanked Peter White for a very clear presentation of the new legislation. The bus sector says that a Local Authority giving priority to bus services is key to the provision of good quality services. Presumably if there is no money that will not be the case? Peter White felt that is true up to a point, although there are some exceptions such as Oxford. Kit Mitchell gave as an example of the financial pressure on local authorities, that Hampshire CC is required by central government to save £140 million over two years, and after a recent debate on how to make these savings, proposes to end subsidies on all bus services and all support for Community Transport.

John Carr (ATCO and CILT) commented that many existing partnerships go back to the 1990s, when they were entirely voluntary. Following statutory intervention (Acts in 2000, 2008, 2017) a wider range of formats is available today. There is a hidden dimension, as Peter White answered in the previous question. It depends on the city and the arrangements. Oxford is an often quoted example, but it is a special case where there are two operators, both having a very close relationship with the Local Authority. As a result bus services follow economic expectations. Another case is Brighton, where the local authority considers that the operators are part of the local infrastructure; traffic engineers work closely with operators to provide needed physical arrangements. Nottingham and York are also cases where successful bus services have grown from close relationships, the first now statutory, the latter still voluntary. Personalities also play a part. Yes, it's important to note that personal relationships are significant, where operators and authority work together the outcomes are generally better..

Peter Headicar (formerly Oxford Brookes University) commented that regarding Oxford, in 2008 it was significantly over bussed. Many of the services were on major radial routes where there was plenty of opportunity for cost savings. He then asked where was the motivation for a Tory government to introduce the new legislation? The 2017 Act does not have the normal characteristics of Tory free-marketing and has rather a nit-picking feel about it? Peter White replied that the legislation was developed during the coalition government years when perhaps there was more of a national interest flavour and it coincided with the move to Metro Mayors in the big cities, which may have been part of the incentive.

Julian Moss (Greater Manchester Transport) commented on the last point, that George Osborne when he was thinking about the Northern powerhouse legislation was clear that the new Metro Mayor should have bus powers. On another point, from discussion with a major operator, he had found a great range of profitability in large cities: 13% in a large Northern city, 3% in another, and only one percent in Scotland. The operator said that most of the difference in profitability was not due to transport factors, but rather to the local trade union and other factors.

John Carr (Chair, ATCO Performance Executive; Director of CILT and Technical Adviser to the CILT BusMark Benchmarking Group) spoke on “Two sides of the coin – The ATCO Local Authority Passenger Transport Survey”. In October 1998, ATCO first collected data on bus service contract prices as the Price, Expenditure & Competition Survey. In June 2006, an annual series of Benchmarking Surveys devised by the ATCO Performance Group was initiated. In 2016 these were combined into the Passenger Transport Survey and questions on real time information were included, as RTIG (the Real Time Information Group) was no longer able to survey this. The survey achieved response rates of 67% for English Counties (18 out of 27), 64% for English Rural Unitaries (14 out of 22), 58% for English Urban Unitaries (19 out of 33), 50% for English PTEs (3 out of 6), 65% for Scottish Councils (13 out of 20) but only 27% for Welsh Councils (6 out of 22). Trends in local bus service costs show that the cost of local bus services have been fairly steady at £6 per head of population since 2007, but that unconventional transport has fallen from £1 to £0.8 and the cost of information has halved from £0.4 to £0.2. Out-turn prices for contracts for de-registered services have fallen considerable, but prices for Special Education Needs transport have risen substantially. As indices, the out-turn prices of all types of contract have been falling since at least 2007. But the cost of concessionary travel has risen, from £54.52 per head of the eligible population in 2007 to £82.64 in 2016.

CILT set up Bus Mark as a subscription based group for the bus and coach industry in November 2014, building on a number of European, International Bank for Reconstruction and Development, and CPT studies. This benchmarking survey has a number of purposes:

- **Continuous improvement:** Prompt questions and investigations into areas where performance might be improved
- **Assurance:** Have confidence that value for money and outcomes measure up well against industry comparators
- **Networking:** See how others solve problems, solicit new ideas and suggestions, check proposed courses of action
- **Rigour:** Store, provide and share data and invite open discussion about factors of (non-competitive) interest

Early results show, for example, a high staff turnover (around 50%) for both drivers and engineering staff. They also show that half of all tickets are already issued using smart systems for various types.

In the discussion of this paper, John Cartledge (London Travel Watch) commented that some of the data being collected by ATCO was basic output data. But why was it left to ATCO to collect the data? In the 1980s (before the 1985 Act), data used to be collected by organisations like the old Association of County Councils. Why was that not happening now? John Carr explained that in the old days the data was quite simple and aggregate. ATCO came in because that was a need for some non-

aggregate data. It is surprising that even DfT relies on ATCO data. Surely Government should press harder to collect its own data!

Robert Pain (Senior Insight Advisor at Transport Focus, managing the Bus Passenger Survey) spoke on “Reflecting on the customer experience: the Bus Passenger Survey 2016”. The 2016 Bus Passenger Survey covered bus passengers in 42 areas of England: 6 former metropolitan counties, 11 unitary authorities, 4 two-tier authorities and 21 bus company divisions; and 8 areas in Scotland: 6 Transport Partnership areas (covering the majority of the mainland) and 2 bus company divisions (First Glasgow and First Scotland East). Across the entire survey, opinions were gathered from 46,530 bus passengers about the journey they had just completed. The results showed that 87% of respondents were satisfied with their journey overall; 73% with the punctuality; 84% with the journey time; and 65% with the value for money (concessionary travellers excluded from this result). Factors contributing to a satisfactory journey were timeliness (24%), the bus driver (23%) and the on bus environment and comfort (18%). But for a great journey, the factors were the bus driver (31%) and the on bus environment and comfort (19%). Robert then showed results for key measures by local authority area, by PTE and by operator, which demonstrated the substantial differences between areas, PTEs and operators. These enable operators or local authorities to identify aspects of performance in which they are perceived by users to be offering a good service or to be below average. They are best studied on the copy of the presentation on the TSUG website.

The survey also produces perceptions of bus services by passenger age, journey purpose, whether the passenger had a seat, and time of day/ day of week. Further analyses showed the factors affecting journey time, of which the main factors were congestion, passenger boarding time and road works. Congestion and boarding time have been getting worse since 2013, while the other factors have not changed. There were large differences between areas.

In the discussion, Nico Dekker (Railway System Consultants) wondered if the reason for the lack of passenger information at bus stops is financially driven and if this is a reason why satisfaction is so low. Robert replied that it is certainly true that information is important, and that provision varies across the country. Often the local authorities took responsibility and in some cases they have withdrawn funding as a result of budgetary pressure. It leads to the question of whether providing information raises expectations. Is the information always accurate?

Mark Trompet (Imperial College) asked about the methodology, and if the sample is aligned with ridership. Robert replied that self-completion questionnaires were handed out on buses to everyone aged 16+. A representative sample is selected as best as possible and the results weighted.

John Carr asked about the funding. Robert said that the surveys are co-funded by some local authorities and some operators, which is why the results do not cover the whole country.

Peter Headicar (Oxford Brookes University) noted the skewness of the distribution. Those who are not satisfied will either not travel or only travel because there is no alternative. Robert replied that we cannot measure non- and lapsed users. There are optional questions in the survey about this. There is a 30+% response rate which is very good for a survey like this. Peter also wondered if bus users are more docile than train users. Robert said that the former are more vocal, whilst bus passengers are more accepting.

John Cartledge (London Travelwatch) noted the different demographics of users throughout the country and pointed out that users in London are polled in a separate exercise. There is no point replicating a survey that was already undertaken. This question was what are the drivers of satisfaction – how do you weight the various areas? Also you need to find the deserters and ask them why. Robert replied that some work in this is being done by local authorities.

Mary Ackland-Hood said that we need information on undesired attributes. Are the current bus routes the ones passengers want and do they connect with other routes? Buses may be deserting passengers and passengers may have fewer alternatives. Robert replied that there are some additional questions at the end of the survey on journeys other than the one just taken.

This was a most interesting seminar with three presentations that complemented each other. Our thanks to the three presenters.

General News

Letter to the Editor

Subject: TSUG Newsletter November 2017

Dear Heather

As I recall, you coordinate this valuable TSUG newsletter. I am writing to you urgently on that basis. In case I am wrong in this, please could you let me know what you can about who to contact.

The headline statement in the November TSUG newsletter is:

that in UK, there is a decrease in the road traffic fatalities between 2015 and 2016

This is wrong! There was an increase in FATALITIES but a decrease in total CASUALTIES between 2015 and 2016. The full article is clear on this:

there has been a statistically significant decrease in the number of casualties of all severities in road traffic between 2015 and 2016.

Safety on Britain's roads is improving. However, although the number of people killed in road accidents has increased between 2015 and 2016

I think that this is worth correcting and reissuing, which I hope will be possible quickly.

Best wishes

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NB: The Editor appreciates Prof Benjamin's email pointing out the mistake in the TSUG Newsletter November 2017. The readers are requested to correct the mistake.

CO₂ Savings

A recent report from the campaigning organisation Transform Scotland has looked at the change in travel patterns between Scotland and London and has concluded that individuals can make a change by using more environmentally friendly modes. Over the last 20 years, the number of trips between the Central Belt of Scotland and London has broadly doubled (2.7m in 1994, over 5m in 2015). But the consequent CO₂ emissions have reduced because more now (a third rather than 20%) go by train.

The annual electricity use of one household is reckoned to be the equivalent of 9 flights or 49 train journeys between London and Central Scotland.

I'm not sure how valid their conclusion is. While rail passenger numbers have trebled (20% of 2.7m to 33% of 5m), air passenger numbers have increased by 55% (2.16m to 3.35m).

Rail

Amtrak in 2017



Amtrak train at Fort Worth, Texas

Amtrak reported ridership, revenue and earnings results for fiscal year 2017 (ending 30 September) that set records in several categories.

Amtrak's 31.7m passenger trips were a 1.5% increase over FY 2016. Total revenue of \$3.2 bn was 1.1% up on the previous year. Operating losses (unaudited, adjusted) of \$194m improved 15.7% over FY 2016. In ridership, Amtrak

achieved year-over-year increases from FY 2016 for all service groups:

- Northeast Corridor (NEC): 12m riders, a 1% increase and the NEC's highest ever ridership in a year. This hides a 1.4% drop in Acela ridership and a 1.9% increase in Regional ridership
- State Supported Services: 15m riders, a 2.1% gain from 14.7m last year. Routes in the West and Mid-West tended to show gains: those in the Northeast and South were more varied.
- Long-Distance Routes: 4.6m riders, a 0.9% increase.

A full numerical analysis can be found on <http://media.amtrak.com/wp-content/uploads/2015/10/FY17-Ridership-Fact-Sheet-Final.pdf>.

Capacity or Performance – either or both?



This was the title of a conference at the Institution of Mechanical Engineers on 14 November.

Chris Rowley, Capacity Planning Director Network Rail, said that Crossrail, Thameslink and the Ordsall Chord are bringing a major increment in train capacity and through journey opportunities on complex and busy parts of the railway. They are also linking complex parts of

East Croydon Station

the railway together, having major interactions on the network.

In May 2017, there were 14.5k schedule changes in the GBTT: in December 2017 there will be 18.2k: in May 2018 there will be over 100k.

He talked about the Sussex area. There must be a fundamental issue here because reliability (the Public Performance Measure) is consistently between 2% and 10% below comparable L&SE operators. 10 of the top 15 complex junctions are in Sussex and Southeastern: there are 20 train crossings each hour on the busiest of these junctions.

Operators are pursuing policies to reduce interdependencies especially in the South and South East. This includes self-contained diagrams and 'firebreaks' in schedules to stop small delays propagating. He showed a video taken from a drone north of East Croydon: 39 trains stopped out of course in one 105" period of the evening peak. Right time presentation, especially at key junctions, was more and more important.

Simon Reay Network Rail Industry Performance Relationship Manager said that punctuality and reliability are measured by what is in the timetable at 22:00 the previous day – so short-term cancellations not obvious to passengers are ignored. The GB network sees 20k trains/day carrying 4.5m passengers. It has 900,000 miles of track, 1.5m signals, and there are 220k station stops. 60% of trains are on time to the minute: 90% are within 5".

Rob Warnes, Northern Rail, described their Great North Rail Project. A £1bn infrastructure investment has led to 2500 more trains each week and 40k more passengers/day.

In May 2018, the Northern Hub and NW Electrification will be big drivers of timetable change. There will be more services on Sundays. Electrification will lead to cascading of rolling stock giving potential for additional trains.

The Ordsall Chord releases much capacity (25%) in Piccadilly: it eliminates crossing moves on the Yorkshire – Liverpool and Yorkshire – Manchester Airport services. More trains through Victoria reduce congestion there – fewer trains terminating lead to fewer delays. 4-tracking is being created in places (especially between York and Manchester), with additional platforms and new stations. These give capacity through allowing fast trains to overtake slow ones.

Passenger Rail Service Complaints 2017-18 Q1 Statistical Release

ORR published this in late October.

For franchised operators on the GB network, there were 28.1 complaints/100,000 passenger journeys - 3.2% higher than the same quarter last year, and the highest Q1 figure since 2012-13 (30.8 complaints).

Factors influencing the increase were ticket buying facilities (8% of the total, up 2 percentage points since Q1 last year), smartcards (4%, up 2 percentage points) and delay compensation. Complaints about train service performance were down at 21%, a 4 percentage point decline to the lowest level since the series began in Q4 2007-08. There were major reductions in complaints under this heading for East Midlands Trains (down 21 percentage points), Southeastern (14 percentage points) and GTR (13 percentage points).

The figures are given as a rate/100,000 passenger journeys because different operators have very different numbers of passenger journeys. Even so, distortion seems to creep in. Grand Central and Hull Trains both have 163 complaints/100,000 passenger journeys – the second highest in the table after the Caledonian Sleeper. Yet in the NRPS, these two are fighting it out with Heathrow Express for the top place in the list of most satisfied customers. So why are they getting a higher complaints rate than the next few on the list - Virgin West Coast (158), Arriva Trains Wales (106) and Virgin East Coast (96)? Thoughts from readers very welcome.

Air

Air France/KLM Q3 Financial Results



Air France A380 at Washington Dulles

In the four quarters to Q3, 2017, Air France/KLM saw passenger revenues only slightly up on the previous four quarters. Passenger kilometres and available seat kilometre figures were the highest since my

time series started in Q4, 2015: passenger numbers were significantly higher at 83m (compared with 79m).

Revenue/passenger-kilometre (yield) was flat at around €244: average flight length (revenue passenger kilometre/passenger) has been slowly trending down from 2983 (four quarters to Q4, 2015) to 2965 (Q3, 2017).

American Airlines Q3 Results

American Airlines reported Q3, 2017 results recently. Key passenger figures are pretty flat.

I produce a 4-quarter moving total for four key statistics – passenger revenue, revenue passenger miles, available seat miles and passenger numbers. All show very little change.

Revenue for the last four quarters is around \$29bn: it has fluctuated between \$27.9bn and \$29bn since my series started in Q4, 2015. Revenue passenger miles (RPMs) are just under 200bn: they too have been steady at just under or just over

that figure for some time. Available seat miles have gone up slightly, to 242bn: unless RPMs increase too, this means a lower load factor. Passenger numbers have also been on a downward trend, to 143.6m: until about a year ago they were above 147m. Revenue/passenger is up slightly, at just below \$200: revenue passenger miles/passenger (average journey length) is also up slightly, at 1391 miles.

Lufthansa Group Q3 2017

The Lufthansa Group of airlines seems to have had a successful third quarter in terms of passenger numbers, with the four figures I monitor as 4-quarter moving totals all showing growth for all members of the group.

Austrian Airlines saw revenue above €2,300m for the first time since my series started in Q4, 2015. Then, it was just over €2,100m. Passenger numbers were above 12.5m for the first time, revenue passenger kilometres were up at a record 19,868m and available seat kilometres have grown more slowly – implying a better load factor.

Figures for Lufthansa itself are slightly distorted by a break in the series: it now includes ‘regional partners’ – Eurowings and, in future, parts of Air Berlin. But like Austrian, all four figures show an increase.

Finally, SWISS continues the trend. Revenue is growing more slowly than for the other two members but is still at a record high. Revenue seat kilometres stand at nearly 45,000m (compared with 40,000m in the four quarters to Q4 2015). Both available seat kilometres and passenger numbers also continue to grow.

Profit for the Group in the quarter was down 17% at €1.18bn, although for the first 9 months of the year it was up 53% on a year ago at €2.56bn.

Pick-up and Drop-off Fees at Airports

Passenger terminal today recently reported on research by the RAC on charges made for cars picking-up and dropping off passengers at airports. Note that a few of the drop-off charges are for premium places, and that slightly more remote spots may be used for less (or nothing). Most of the pick-up charges are for very short term parking. Figures are in £: £0 = free while a blank = no information.

Airport	Pick-up	Drop off
Belfast City	0	0
Birmingham	4.90	2.00
Cardiff	1.00	0
Edinburgh	3.90	1.00
Gatwick	3.80	0
Glasgow		2.00
Heathrow	3.80	0
Jersey		0

Leeds Bradford	0	
Liverpool	0	3.00
London City Airport	3.50	0
Luton	7.00	3.00
Manchester	4.00	0
Southampton	1.00	
Stansted	5.00	3.50

Southwest Q3 Results

Southwest, the prototypical low cost carrier, recently reported good Q3 passenger figures.

Revenue was above \$19bn for the last 4 quarters: this is the first time this has happened since my 4-quarter moving totals start in Q4, 2015. Then, it was \$18.3bn.

Revenue passenger miles are 128bn, compared with 117bn in the four quarters to Q4, 2015. Available seat miles are also up, at 153bn.

Passenger numbers have fluctuated – 148.5m in the last four quarters, compared with 152m in the four quarters to Q1, 2017 and 144.5m to Q4, 2015. Revenue/passenger is down on the previous 4 quarters at \$128.04, but this is high compared to the mid-to-low \$120s in earlier years. Average journey length follows the same pattern – at 862.9 miles, it's below the 865.5 in the previous 4 quarters but above the levels seen before (down at 812.72 at the start of the series).

Road

Bears die on Roads too

27 bears have been hit by vehicles in Yosemite in 2017, including 4 in the last three weeks (at least 3 / 4 died).

Tweet from Yosemite National Park, 15/11/17

Drop in UK Car Sales continues

Financial Times

October saw the seventh consecutive month of declining car sales in the UK. New car registrations in the year to October fell by 12.2% to 158,192: sales of diesel-fuelled vehicles fell by 29.9%.

Diesel cars accounted for nearly half of all vehicle sales a year ago: this is now down to 39.4% because of concerns about air quality.

Sales of electric and hybrid cars rose 36.9% to 5.2% of all vehicles sold – 8244 vehicles. Sales of new cars were 4.6% lower in the first ten months of this year than in the same period last year. The forecast by SMMT is for a 4.7% drop this year overall (to 2.6m), and a further 5.4% drop next year.

Motorway Service Area User Survey Spring 2017

This report was published recently by Transport Focus, and brings together user views on motorway service areas (MSAs) in England.

Almost 2/3 of visitors surveyed were travelling for leisure: 18% were travelling on business and 7% were commuters. 11% were professional drivers – HGV and van drivers. Leisure visitors were evenly split between male and female, while 97% of professional drivers were male. Over a fifth visit MSAs at least every 2 weeks.

About 40% (60%, for professional drivers) planned in advance which MSA they were going to stop at. Using the toilet facilities and getting refreshment were the top reasons for stopping, although HGV drivers usually stopped because they needed to take a break. 75% used the toilets: 50% sat down to have food or drink and a third bought food or drink to consume in their vehicle.

Overall satisfaction with MSAs was high, at 90%: 58% were very satisfied. Westmoreland (98%), Extra (96%) and Welcome Break (91%) all scored high rates of satisfied or very satisfied, with Roadchef (89%) and Moto (88%) close behind. 100% of users were satisfied with the two Reading MSAs (eastbound and westbound): the lowest score (70%) was at Stafford southbound.

HGV drivers rated the main aspects of MSAs the same as other users, but the facilities provided specifically for them (showers, HGV parking and dedicated refreshment areas) lower. Only 47% rated parking packages as good

There was a 17% decrease in those feeling stressed between arrival and departure, and a 20% increase in those feeling relaxed or happy.

Road Goods Vehicles travelling from Great Britain to Mainland Europe

DfT published the results for the quarter and year ending 30 September recently.

Around 3.0m road goods vehicles travelled from Great Britain to mainland Europe in the year ending September 2017: of these, 2.2m were powered vehicles and 0.8m unaccompanied trailers.

The long term trend shows that the total number of road goods vehicles travelling from Great Britain to mainland Europe has been increasing, with the figure in the year ending September 2017 being 65% higher than the figure 20 years earlier. During the year ending September 2017 the number of foreign registered powered vehicles travelling from Great Britain to mainland Europe increased by 1% to just under 2m. In comparison, the number of UK registered powered vehicles travelling from Great Britain to mainland Europe fell by 2% (to 0.3m) compared to the previous year. Over the last 20 years, the number of UK-registered powered vehicles travelling from Great Britain to mainland Europe has been in gradual decline, while the number of foreign-registered powered vehicles has been steadily increasing, with the exception of a recession related dip between 2008 and 2009.

Since 2015, the number of foreign-registered vehicles has remained around 1.9m to 2.0m, suggesting the upward trend may be starting to peak. Back in 1996, over half

of the powered vehicles travelling from Great Britain to mainland Europe were UK registered (52%), compared to only 12% in the latest 12 month period.

Over the last 20 years there has been a major increase in the number of foreign-registered powered vehicles travelling from Great Britain to mainland Europe (from 0.6m in the year ending September 1997, to just under 2.0m in the latest 12 month period). The proportion of powered vehicles registered to countries such as the UK, Netherlands, Germany and France that travelled from Great Britain to mainland Europe has fallen as a number of other countries have greatly increased their share since joining the European Union (EU). The volume of powered goods vehicles registered to Poland has increased from 3% in 2004 when it first joined the EU, to 21% in the year ending September 2017 - the largest share of any country. The number of powered vehicles registered to Poland travelling from Great Britain to mainland Europe increased by 2% from 457 thousand in the year ending September 2016 to 466 thousand in the year ending September 2017. Since Romania joined the EU in 2007, its share of powered goods vehicles travelling from Great Britain to mainland Europe has risen from 1% to 11% in the year ending September 2017.

Unlicensed Vehicles

The rate of unlicensed vehicles observed on the road was higher in 2017 than when previously surveyed in 2015. In 2017, the rate of unlicensed vehicles in traffic in the UK was estimated to be 1.8%, compared with 1.4% in 2015 and 0.6% in 2013. About 1.9% of all vehicles in stock were unlicensed. This is equivalent to about 755,000 vehicles.

The Private and Light Goods vehicle tax class, which accounts for 89% of all licensed vehicles, had an evasion rate of 1.8%, similar to the overall average.

Rates of evasion in traffic are relatively low for both the goods vehicle (0.7%) and bus (0.8%) tax classes. The evasion rate for exempt vehicles is 1.5%. Although exempt vehicle do not have to pay Vehicle Excise Duty (VED), they still need to be licensed for use on the road.

The West Midlands (2.1%) and the North West (2.0%) showed the highest rates of evasion in traffic. East of England had the lowest rate at 0.8%. There was little significant difference between the other regions where the rate varied between 1.6% and 1.8%. These results are based on where vehicles were seen in traffic, not where they are registered.

It is estimated that the levels of VED evasion seen in the June 2017 survey would correspond to around £107m in lost tax revenue over a full year, for the United Kingdom. This is higher than in any year since at least 2007, due to the increase in the evasion rate. This equates to approximately 1.7% of the total VED due, although some of this lost revenue will have been recovered through DVLA enforcement activity or through vehicle keepers paying arrears of duty to cover the untaxed period.

It is estimated that 79% of the unlicensed vehicles seen in the survey belong to the 'Private and Light Goods' taxation class, 14% were motorcycles, 6% were 'exempt' (vehicles which do not have to pay any VED, but still need to be licensed for use on the road), and 1% were goods vehicles, buses or in other tax classes. Because VED rates vary between tax classes, the potential revenue loss from these unlicensed vehicles is spread differently, with 90% attributable to Private and Light Goods, 6% to motorcycles and 4% to goods vehicles, buses and other non-exempt tax classes.

Sea

All at Sea?

DfT published a useful guide to maritime statistics, showing what data they had and where it was. See

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/387859/guide-to-maritime-statistics.pdf .

They also published a useful write-up of sea passengers, supplementing the tabular information released as Excel files. This

(https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/661355/final-sea-passenger-statistics-2016.pdf) showed a continuation of the decline in international sea passengers by short sea routes to 20m in 2016 – 5% down on the previous year. It is now virtually the same as the number of Channel Tunnel passengers (20.6m): this has come down steadily since the peak of 35m in 1994 (strangely, also much the same time as the peak in international short sea passengers of around 20m).

There are 4 groups of ports for short sea international passengers – Thames & Kent, East Coast, West Coast and South Coast. All except the latter have shown a small decline. France and Ireland are the most popular destinations.

Cruise passenger numbers were up 5% at 2m – nearly twice as many as in 2006. Most – 1.7m – use Southampton.

The notes about domestic sea and ferry passengers are interesting! It is, of course, too soon to expect a breakdown of the 'all river crossings' figure which TSUG asked for at a recent seminar on maritime statistics.

BTS Releases National Census of Ferry Operators Highlights



Trans-Hudson Ferry at Hoboken, New Jersey

The U.S. Department of Transportation's Bureau of Transportation Statistics (BTS) released the 2016 Highlights of Ferry Operations in the United States in early November.

Key findings from the 163 ferry operators that responded to the 2016 National Census of Ferry Operators (NCFO) indicated that 118.7 million passengers were carried on ferries in the U.S. and its territories in 2015.

The reporting ferry operators provided service through 560 terminals on 880 unique route segments in 39 states, 2 U.S. territories, and 2 non-U.S. locations, using a fleet of almost 609 active vessels.

Comprehensive results and visuals from the 2016 census, as well as data from previous censuses, can be found on the NCFO home page

<https://www.bts.gov/surveys/national-census-ferry-operators-ncfo/national-census-ferry-operators-ncfo>).

The NCFO is a biennial census of all known ferry boat operations within the U.S. and its territories. Ferry operations included within the scope of the NCFO are those providing itinerant, fixed route, and common carrier passenger and/or vehicle ferry service.

Record Year for the Port of Baltimore



The Port of Baltimore's public marine terminals handled more containers and general cargo than ever before during fiscal year 2017 (ending June 30, 2017). The port handled 907,957 TEU containers and 10,347,794 tons of general cargo, which includes cars, containers, farm and construction machinery, forest products and breakbulk.

Baltimore from the Air

The previous records were set in fiscal year 2016, with 868,875 TEU containers and 9,787,011 general cargo tons.

Business at the port generates about 13,650 direct jobs, while more than 127,000 jobs in Maryland are linked to port activities. The port is responsible for nearly \$3 billion in individual wages and salary and more than \$310 million in state and local tax revenues.

In June, the port handled 87,565 TEU containers, the most of any month in its history. In the first six months of the calendar year, the port handled 5,324,178 general cargo tons, more than the first half of any other calendar year.

The Port of Baltimore was the fourth fastest-growing port in North America in 2016, with a 9.8% increase in the amount of cargo handled from the previous year. That came on the heels of several other achievements and a record-setting 2016, in which the port's public marine terminals exceeded 10 million tons of general cargo for the first time and handled a record number of containers (538,567).