Find out here about the key recent trends in the growth of long distance travel and forecasts of future growth which underpin the Economic Case:

- Demand for long distance travel has grown across all modes over the past 15 years with particularly strong growth in demand for long distance rail journeys;
- this has mainly been the result of growing prosperity;
- forecasts indicate that rising incomes and population will see a continuation of this growth, but generally at a more modest level than seen on average in the recent past.

**The HS2 Economic Case**

**Introduction**
The Economic Case for HS2 (London to West Midlands) is underpinned by travel demand forecasts for rail and other modes of transport. The benefits of high speed rail are particularly closely related to demand for long distance rail travel given that this is the principal market for high speed rail.

**Recent trends in long distance travel growth**
Whilst the total number of trips people make has been relatively static in recent years, the average distance travelled has been increasing, reflecting higher growth in the number of long distance trips, and has been particularly rapid in rail markets.

Both air and long distance rail travel have grown substantially since 1995. This is likely to reflect economic growth as well as improved journey times, frequency of service and reliability for rail; and lower air fares. Domestic air trips have, however, declined in recent years – reflecting greater competition from rail; and higher levels of security and lengthening of check-in times which has made domestic air travel comparatively less attractive.
Whilst long distance rail trips more than doubled between 1994 and 2009 – they still account for only a minority of long distance trips, with rail journeys constituting just 13% of such trips in 2008. Car trips comprise the bulk of current long distance travel. This suggests continued scope for growth in long distance rail market, even if car demand growth is more subdued.

**Forecasting future long distance travel growth**

Past experience suggests that demand for long distance travel is likely to increase as the economy grows. This is particularly the case for rail travel. As people become more prosperous they tend to make more long distance journeys, and a higher proportion of these tend to be by rail. There is no evidence of any weakening of that relationship.

Nonetheless, we have conservatively assumed that demand would not continue to grow indefinitely and assumed no further growth beyond 2043.

Our forecasts indicate that the total number of long distance (over 100 miles) road, rail and air trips per person will increase by 36% between 2008 and 2043. The resultant number of trips per person would still be less than the number of long distance trips made by people in higher income groups today.

<table>
<thead>
<tr>
<th>Mode</th>
<th>2008</th>
<th>2043</th>
<th>Forecast % change, 2008–43</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car</td>
<td>5.4</td>
<td>6.8</td>
<td>26%</td>
</tr>
<tr>
<td>Rail</td>
<td>0.9</td>
<td>1.4</td>
<td>61%</td>
</tr>
<tr>
<td>Air</td>
<td>0.2</td>
<td>0.4</td>
<td>87%</td>
</tr>
<tr>
<td>Other</td>
<td>0.5</td>
<td>0.8</td>
<td>68%</td>
</tr>
<tr>
<td>Total</td>
<td>7.0</td>
<td>9.5</td>
<td>36%</td>
</tr>
</tbody>
</table>

*Sources: 2008 data are based on results from four NTS survey years: 2006 – 2009, HS2 Ltd model forecasts for car, rail, and air, without HS2 (London to West Midlands). Note figures have been rounded.*

Even without high speed rail, we forecast that demand for rail travel will grow much faster than demand for car travel, with 61% growth in rail trips per person by 2043, compared to 26% for car. However, growth in rail is from a much lower base. Even with this high rate of growth the forecast is that, on average, there are only around 0.5 extra trips per person per year on rail by 2043. Population growth will further boost forecast travel demand such that the total number of long distance rail trips will grow by 95% between 2008 and 2043.

**The impact of HS2 (London to West Midlands)**

HS2 (London to West Midlands) would offer substantial reductions in journey times, as well as reduced crowding for passengers on both the classic rail network and on HS2 itself. This would make rail travel more attractive, encouraging people who would otherwise use car and air to switch to rail, and allowing people to travel more often.
Overall we estimate that about $\frac{1}{3}$ of HS2 (London to West Midlands) passengers would be making new rail trips. Of this around 40% would be people who would otherwise have travelled by car or air; and 60% would be new trips.

**If you would like more detail on this topic**

Please visit our website – http://highspeedrail.dft.gov.uk/ – where you will see the “High Speed Rail: Investing in Britain’s Future – Consultation” and all the documentation published alongside it, as well as detailed maps of the proposed route between London and the West Midlands and images and visualisations.