Agenda item 7

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**27 October 2025**
By:	**Chief Officer, Transport for the South East**
Title of report:	**State of the Region Report**
Purpose of report:	**To seek approval from the board to publish the 2025 edition of the "State of the Region" Report.**

RECOMMENDATION:

The members of the Partnership Board are recommended to agree the 2025 State of the Region Report and agree to its publication on the TfSE website.

1. Background

1.1 In 2023 TfSE published its inaugural 'State of the Region" report. It was designed to provide an overview of how the region is changing through key indicators linked to our transport strategy, with the 2023 iteration of the report acting as a baseline. It was agreed that an updated report would be produced every two years.

1.2 The State of the Region report is not intended to be a means of directly measuring performance of the Transport Strategy and Strategic Investment Plan (SIP), at least not in the short term. The Strategic Investment Plan will take some time to be delivered and the metrics being examined can be influenced by many external factors. Hence, the State of the Region report should be seen as more of a holistic view of whether the TfSE region is headed in the 'right direction'. Asking a crucial question: "Are the big-picture metrics of regional performance, linked to the aspirations of the Transport Strategy and Strategic Investment Plan, changing for the better, and at a sufficiently fast rate?"

1.3 The 2025 State of the Region report provides an up to date position with those big-picture metrics and offers a commentary on the changes and trends that have occurred since the 2023 baseline report.

2. 2025 State of the Region Report

2.1 In contrast to the 2023 inaugural report, which is a .pdf document on the TfSE website, the 2025 update has been produced using the ArcGIS story map software tool. This report is designed to be viewed online and provides the opportunity to explore the data and analysis within the report through interactive graphs and maps. The draft 2025 State of the Region report is available at this link. A pdf version will however be made available on request for any users who are

unable to access the interactive version. This version is also provided for information on the content of the report at Appendix A.

2.2 The 2023 baseline required the use of consultants to prepare, however, as a result of the increased technical capability and capacity built within the TfSE Analysis Team, this update has been produced in house.

2.3 The 2025 update uses mostly the same metrics as the first iteration to enable monitoring of the changes in the region, however this has also been supplemented with data gathered through the recently completed regional travel survey. The report has also been structured to reflect the desired outcomes of the new missions within the refreshed transport strategy.

2.4 The key takeaways from the report are that in 2020 there was a sharp decrease in total carbon dioxide emissions from transport, a result of the Covid pandemic. In the years of recovery since, total carbon dioxide emissions from transport have not returned to the pre-Covid levels. There has been an increase in EV uptake in the TfSE region, and the amount of publicly available EV charging points has increased.

2.5 However, the report also reinforces the challenges faced by our region, highlighting the difficulties faced in rural areas accessing services using public transport and the reliance across the region for using car as a main mode of transport.

2.6 Insight gained from the 2025 State of the Region report highlights where increased focus is required and will be used to inform TfSE's forward work programme to ensure that supports delivery of the missions set out in the transport strategy.

2.7 The report will continue to be updated at two-year intervals to observe the long term changes in our region.

3. Conclusions and recommendation

3.1 The Partnership Board are recommended to approve the draft 2025 "State of the Region" report and agree for it to be made publicly available on the TfSE website.

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TRANSPORT FOR THE South East

(Print version) State of the Region 2025 Report

** THIS IS A DRAFT DOCUMENT**

TfSE Publisher
Draft

This is the second State of the Region report from Transport for the South East (TfSE). It has been designed to provide an overview of how the region is changing through key indicators linked to our Transport Strategy.

Each indicator is connected to one of our five Transport Strategy missions. These are:

- Strategic Connectivity
- Resilience
- Inclusion and Integration
- Decarbonisation
- Sustainable Growth

However, as these high-level measures are shaped by many wider factors, this report should not be taken on its own as a direct assessment of our progress in delivering the Transport Strategy or the Strategic Investment Plan (SIP). Instead, the metrics give a snapshot of how the South East is evolving across key aspects of the economy, society and

environment.

The findings in this report are based on a wide range of data sources, including open datasets, government and ONS releases, as well as information provided by Network Rail, Solent Transport, Transport for the North and Steer. We have also drawn on our own Regional Travel Survey. For all graphs and charts, you can view the data source by clicking on the i icon

We plan to publish this report every two years to highlight key trends and developments shaping the region.

Transport for the South East (TfSE) have prepared this information using data available at the time of authorship. Any new information released since may alter the validity of the conclusions reached. TfSE does not accept any liability for any financial loss or damages incurred due to the use of any data in this report where the data is used without express permission from TfSE.

Our region

These initial indicators set the scene for the general economic state of the region. Please note throughout this report, some of the supporting evidence is aggregated on the census defined South East region level, which in addition to the TfSE local transport authorities (Bracknell Forest, Brighton and Hove, East Sussex, Hampshire, Isle of Wight, Kent, Medway, Portsmouth, Reading, Royal Borough of Windsor and Maidenhead, Slough, Southampton, Surrey, West Berkshire, West Sussex, Wokingham), also includes Buckinghamshire, Milton Keynes and Oxfordshire.

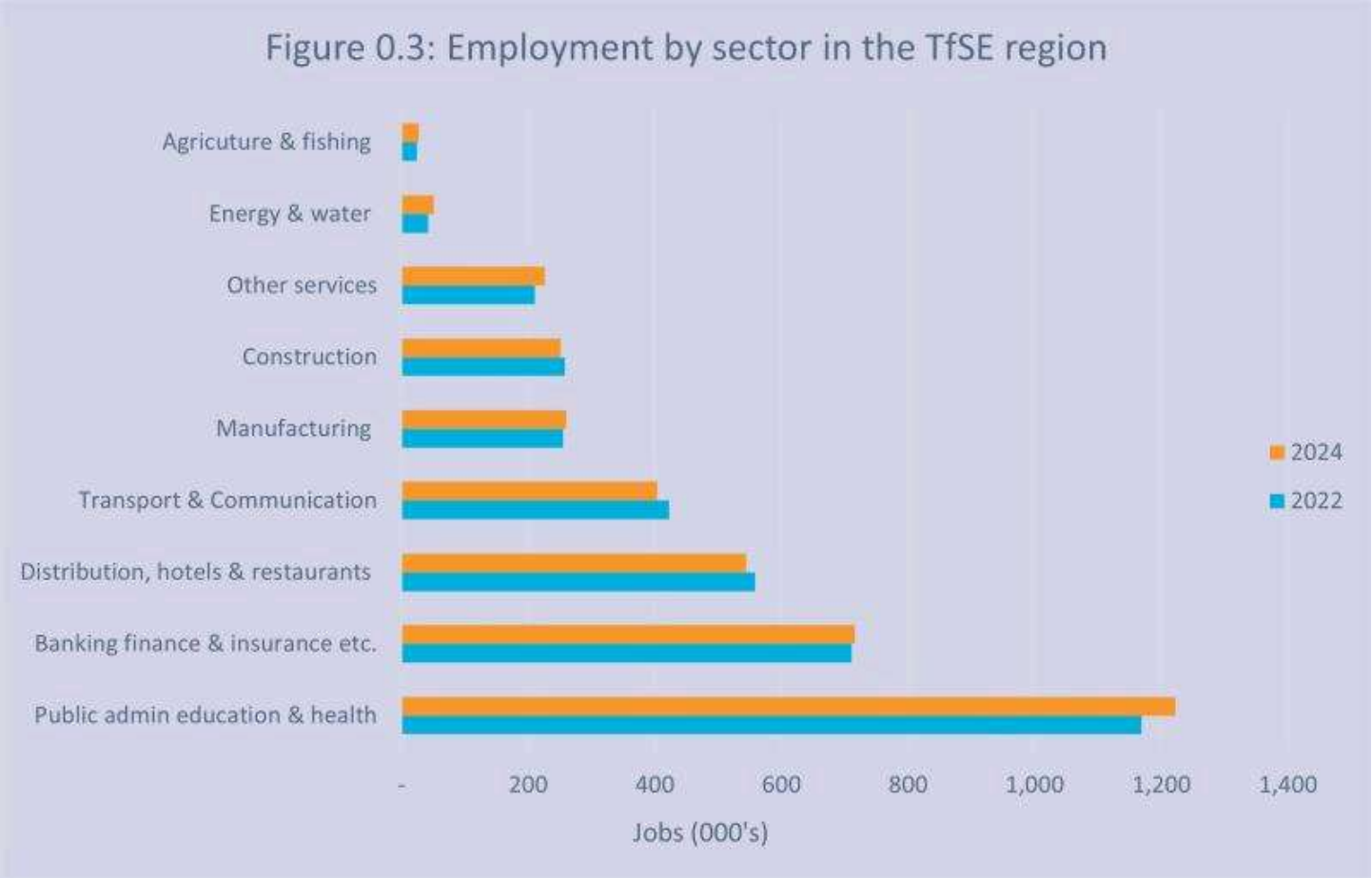
Figure 0.1: TfSE geography prepared by Steer for 2023 state of the region report

Productivity

Gross Value Added (GVA).

Figure 0.2 shows that although the TfSE region has seen an increase in GVA per head of population since the last report, the rate of increase has been lower than that seen across the UK as a whole.

The total GVA per head in our geography is still higher than the UK average (£37,501 in TfSE, £36,103 in UK). However, the difference in GVA generated within the TfSE area has decreased from 5.1% more productive than the UK as a whole in 2021 to only 3.9% more productive in 2023.



Employment

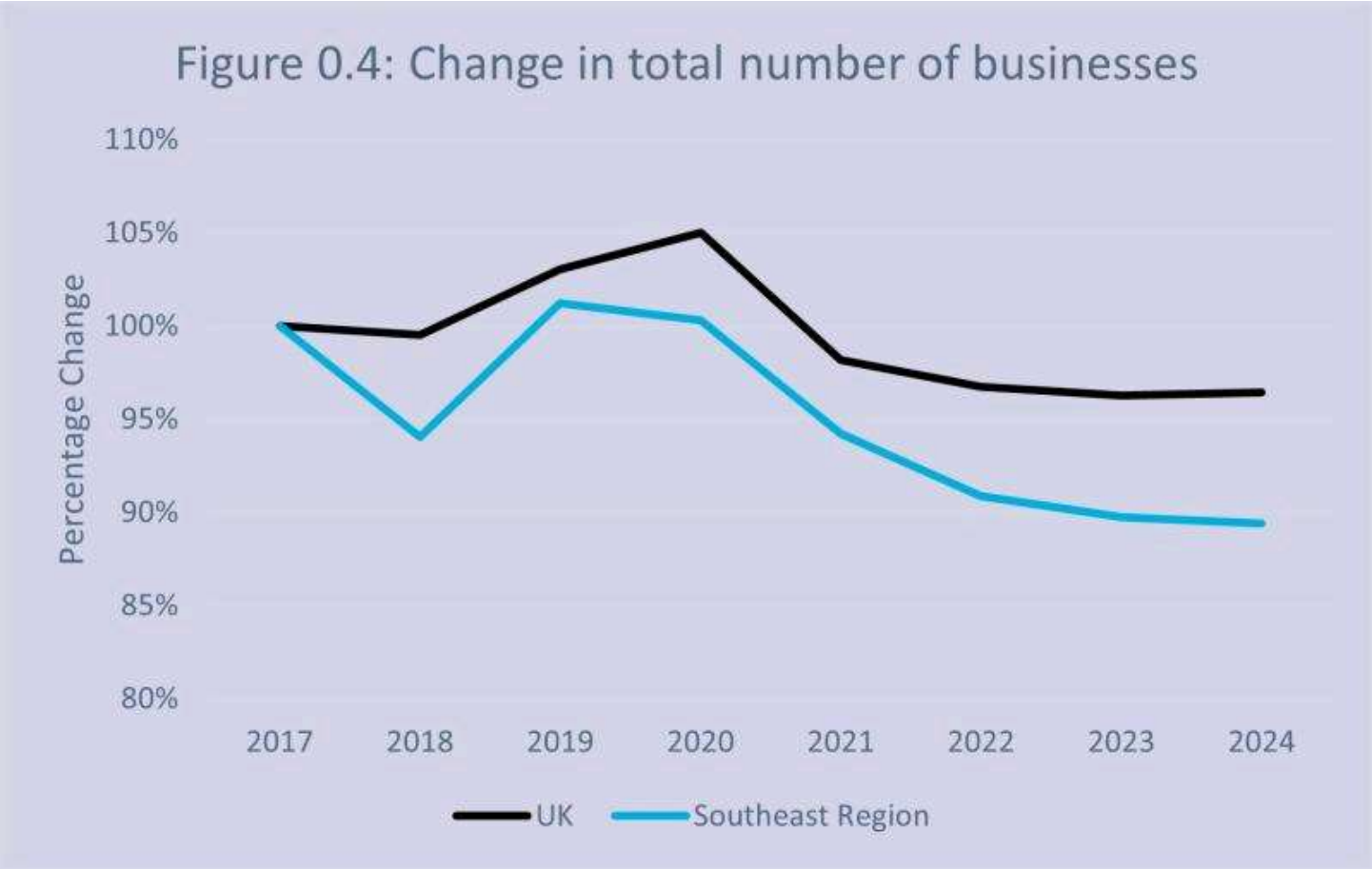
Jobs by sector

Figure 0.3 shows the change in employment by sector in the past two years in the TfSE geography. The number of people employed in each sector has remained relatively stable.

Jobs in agriculture & fishing, manufacturing, construction, and transport & communication, are considered to be reliant on the Strategic Road Network (SRN), and therefore require a resilient and reliable highway network.

Unemployment

The rate of unemployment in the region has increased from 3.2 in 2022, to 3.6 in 2024. This remains lower than the rate in the UK as a whole, which has increased from 3.7 in 2022, to 4.3 in 2024.



Businesses

Total businesses

Figure 0.4, uses a baseline of number of businesses in 2017 to show the change in total number of businesses in the region. The number of businesses in the ONS-defined South East region has decreased more than the UK as a whole. In the past two years there has been a further decline in total businesses, with a net loss of 13,410 businesses from 2022 to 2024. The total businesses in the South East in 2024 was 830,570.

Exporters

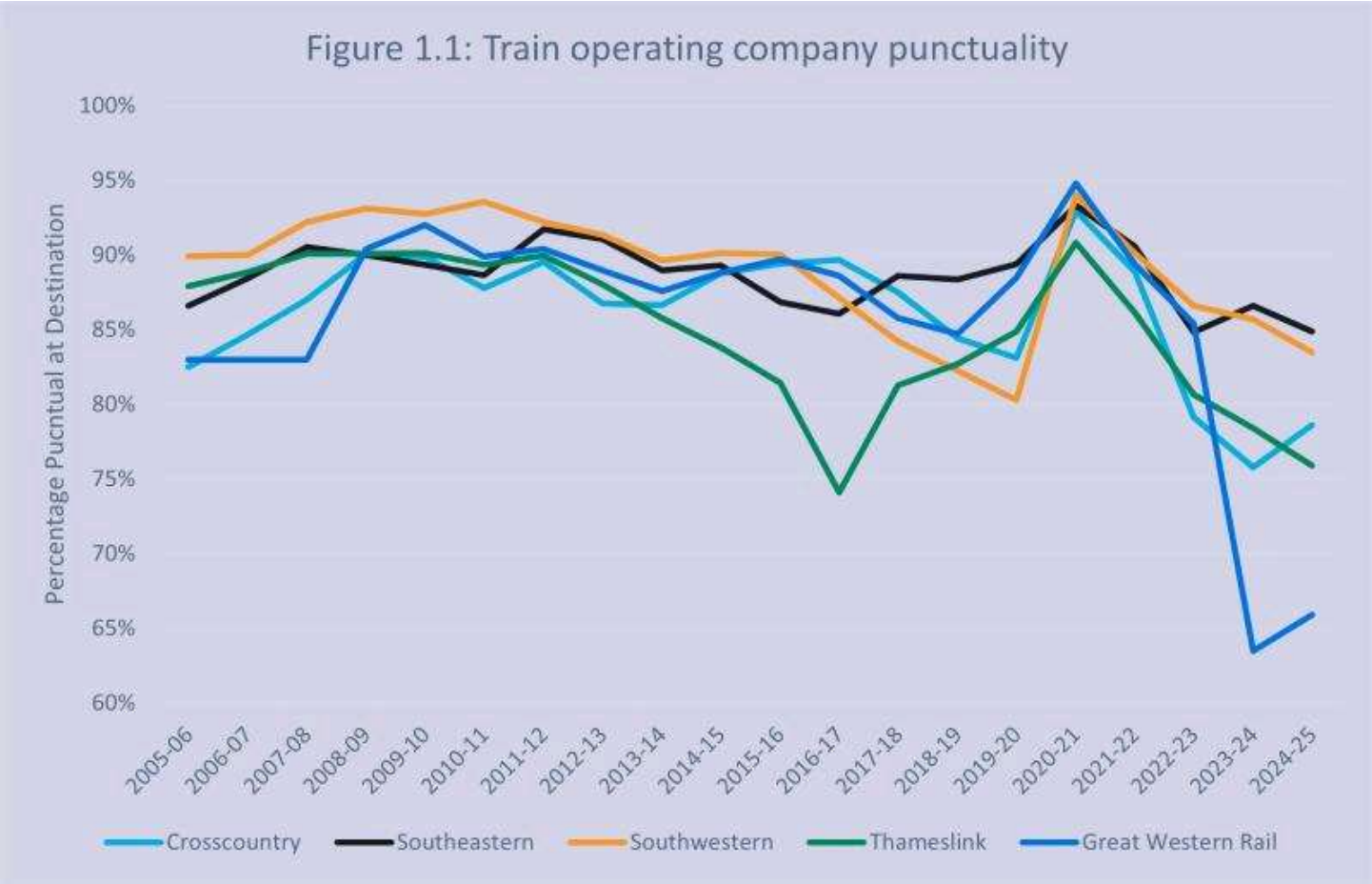
Figure 0.5 shows the total number of South East Businesses that are exporting goods.

Given the number and scale of international gateways (ports and airports) in the region, a thriving economy would be expected to generate a high number of businesses exporting goods. In the most recent two years of available data, the total number of exporters has increased, with 2023 recording the second-highest figure on record, surpassed only by 2020.

Strategic connectivity

This mission aims to improve strategic connectivity within the South East by enhancing regional transport corridors, ensuring communities have access to high quality transport links and essential services.

The following series of indicators measure strategic connectivity by monitoring the performance of the highway and public transport networks in the region, and the impact it has on freight movements.



Journey time reliability

Rail

Figure 1.1 shows the reliability for total services run by each train operator in our geography. It is important to note that services for each operator do not exclusively run in the TfSE region. However, it still provides a good indicator for how punctual trains are for residents.

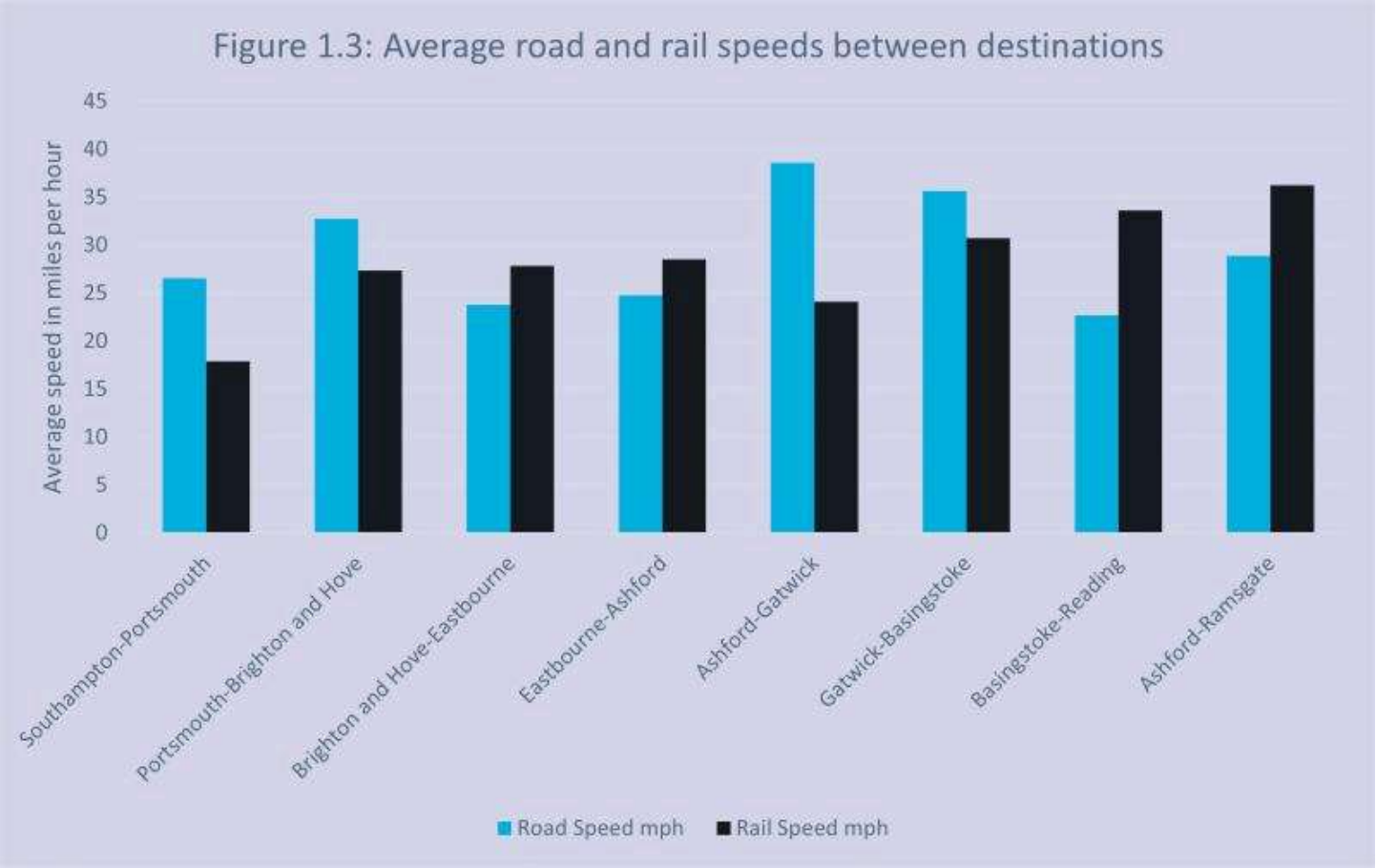
In the two years since the last *State of the Region* report, there has been a decline in average punctuality of

operators from 83.3% in 22/23 to 77.8% in 24/25. However, this is heavily skewed by the performance of Great Western. For the other operators in our geography the average has decreased from 82.8% to 80.7% in the same timeframe.

Highway

Figure 1.2 shows the average delay in seconds on the Major Road Network (MRN) and the Strategic Road Network (SRN) in our geography. Please note that the MRN and the SRN delay is calculated on different link lengths, so using this data to compare performance of the SRN against performance of the MRN is not appropriate.

Since the last report the average delay has returned to pre-pandemic levels on both the MRN and the SRN.



Journey times

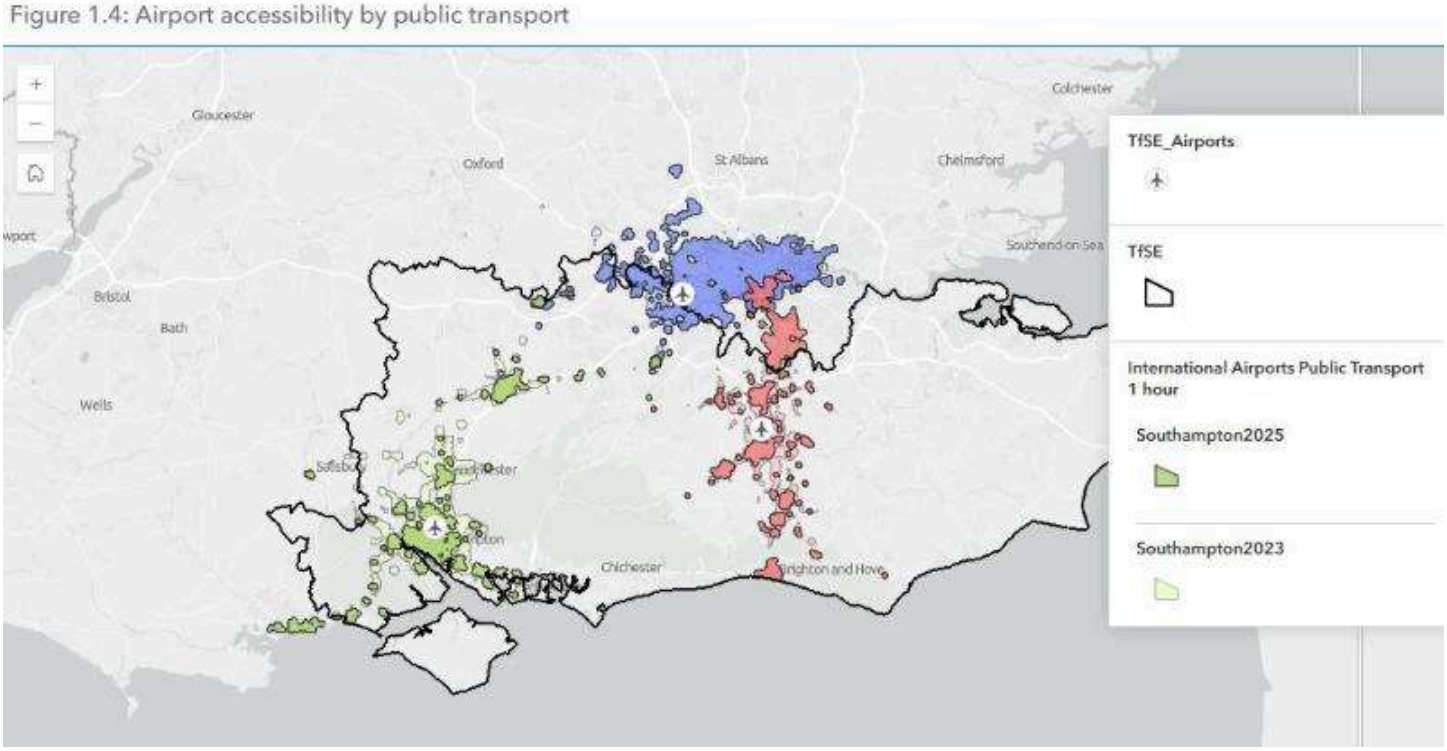
Figure 1.3 shows the difference in average speed for point-to-point journeys in our region that do not originate or end in London.

The data is taken as a snapshot for a mid-week off peak journey time. For peak journeys road speed would decrease due to more congestion.

For some journeys between key centres in the region, average rail speeds are faster than those by road. However, these figures reflect only speed and do not take into account the frequency of services or the time needed to access a station.

This suggests that where rail is as fast as, or faster than, road travel, the choice to use a private car is likely motivated by other factors, such as greater convenience or reliability.

Figure 1.4: Airport accessibility by public transport



Airport accessibility

Figure 1.4 shows the geography of residents who are able to access international airports within one hour by public transport.

The number of residents in our geography able to access Gatwick within one hour has increased from 533,619 in 2023 to 703,568 in 2025. This increase can be attributed to more parts of Brighton and Hove, and Oxted and Shalford moving into this catchment area, likely caused by an increased frequency of public transport. Access to Gatwick is still much easier from north-south compared to east-west of the region, we are advocating for enhanced rail from both Kent and the North Downs line to Gatwick Airport to improve public transport accessibility from the East and West to the airport.

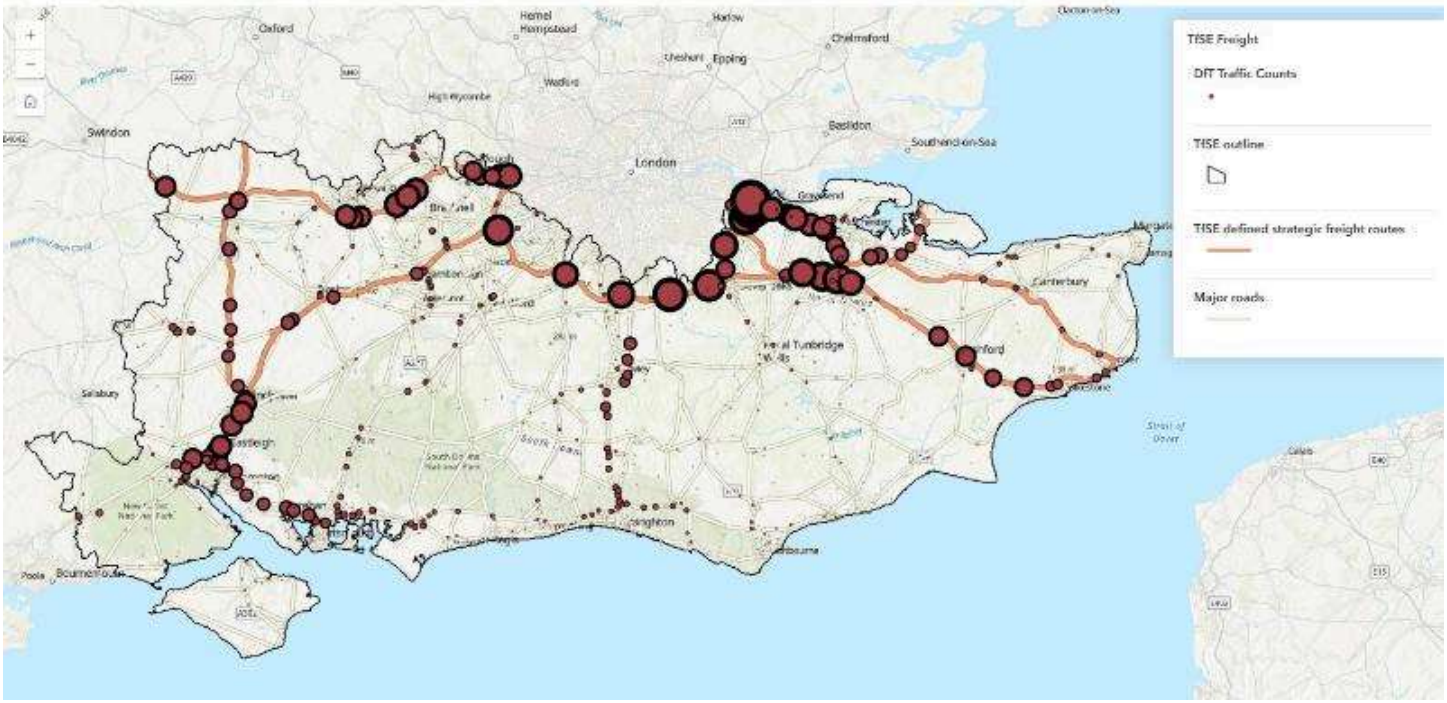
Heathrow has also seen a large increase, from 412,982 in 2023 to 703,568 in 2025. Despite this increase, public

transport accessibility to Heathrow from our region remains poor when compared to equivalent distance journeys from London.

Southampton Airport has seen a moderate increase, rising slightly from 1,003,429 in 2023 to 1,065,702 in 2025. Southampton Airport has the highest number of residents within our region who can access it by public transport in under an hour.

Despite the increases in total residents able to access airports within one hour by public transport, some areas which were previously within an hour journey time of an airport in 2023, are no longer within this catchment. This is most likely attributed to timetable changes for bus and rail services.

Figure 1.5: Freight routes in TfSE region

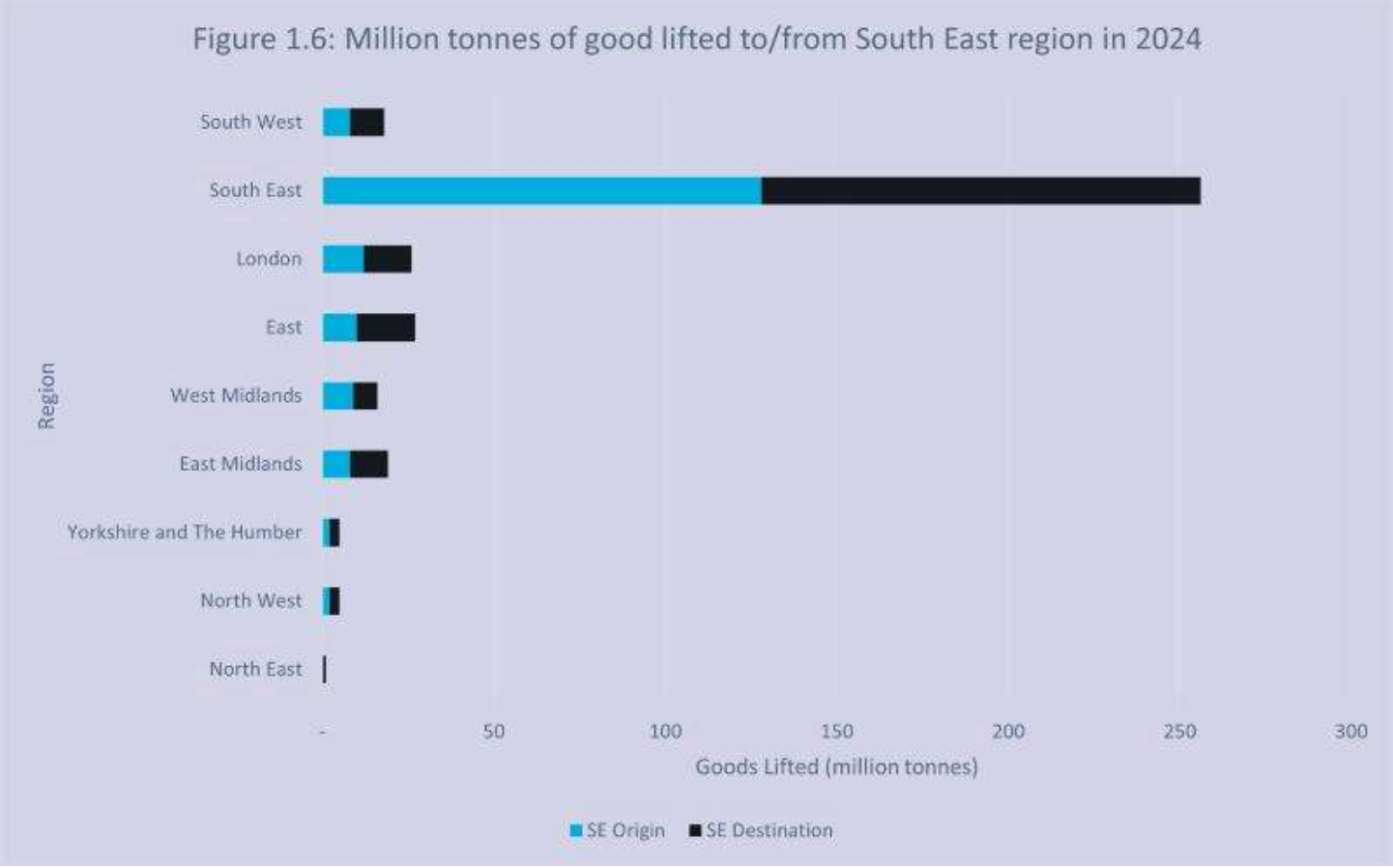


Domestic freight

Figure 1.5 shows the key freight routes in our region. The points are locations of automated traffic counters, the larger points have a higher number of annual average daily flow HGV movements as per DfT road traffic statistics raw count data.

The most significant links for freight in our region are clustered around the M25 for freight travelling from Kent. There is also a cluster around the port of Southampton, where freight is distributed north via the M3 and A34.

In addition, there is a relatively high amount of freight travelling on the M27 between Portsmouth and Southampton, and to a lesser extent on the M23 corridor.

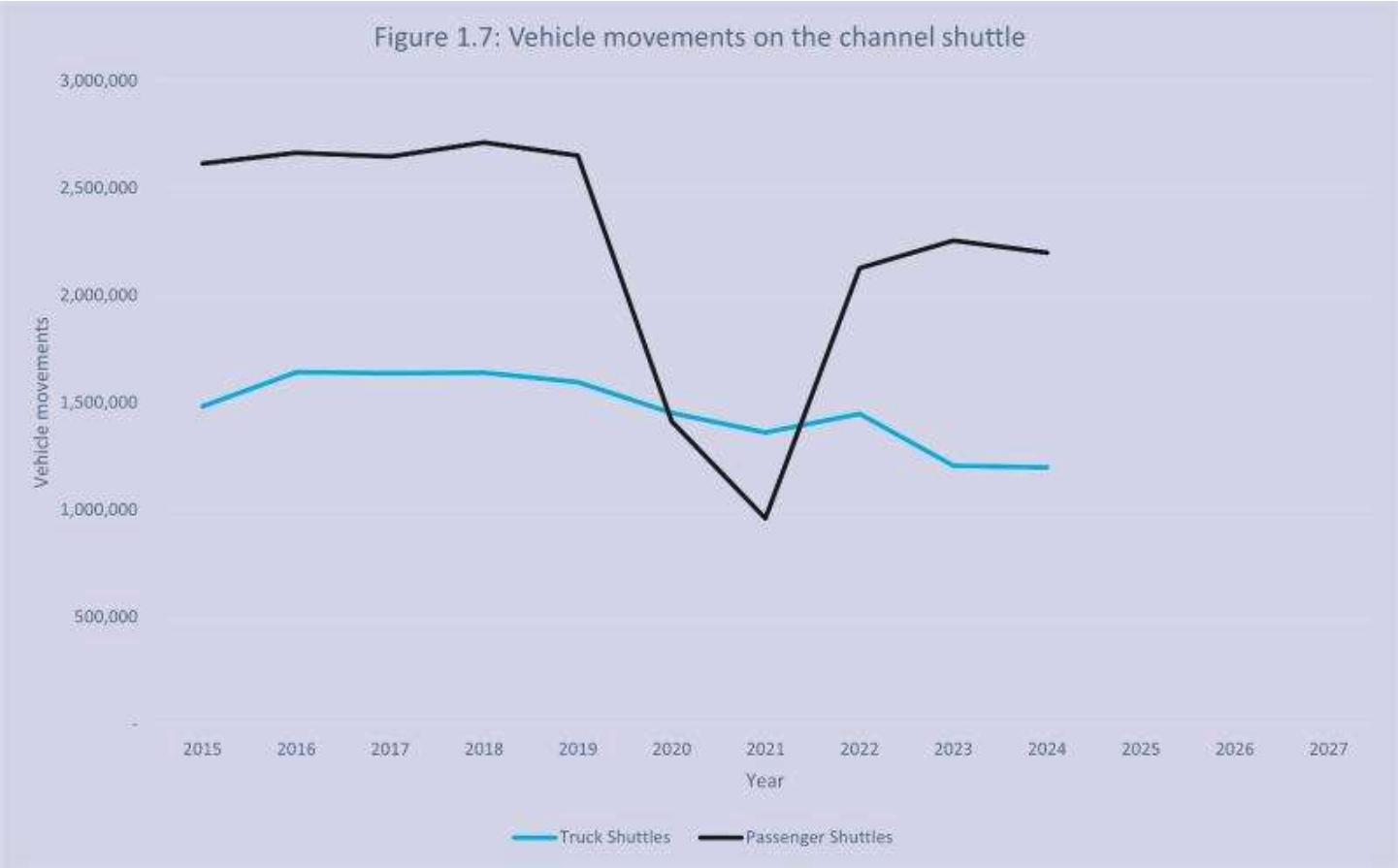


Freight moved

Figure 1.6 shows the total tonnage of domestic goods lifted with either an origin or destination in the South East (including Buckinghamshire, Milton Keynes and Oxfordshire) for each English region in 2024.

Compared to the previous iteration of this report, there has been a 9% increase in tonnage originating in the South East, and a 12% increase in goods destined for the South East.

There was a total combined tonnage in 2024 of 379 million tonnes.



International crossings

Figure 1.7 shows crossing data from the channel shuttle.

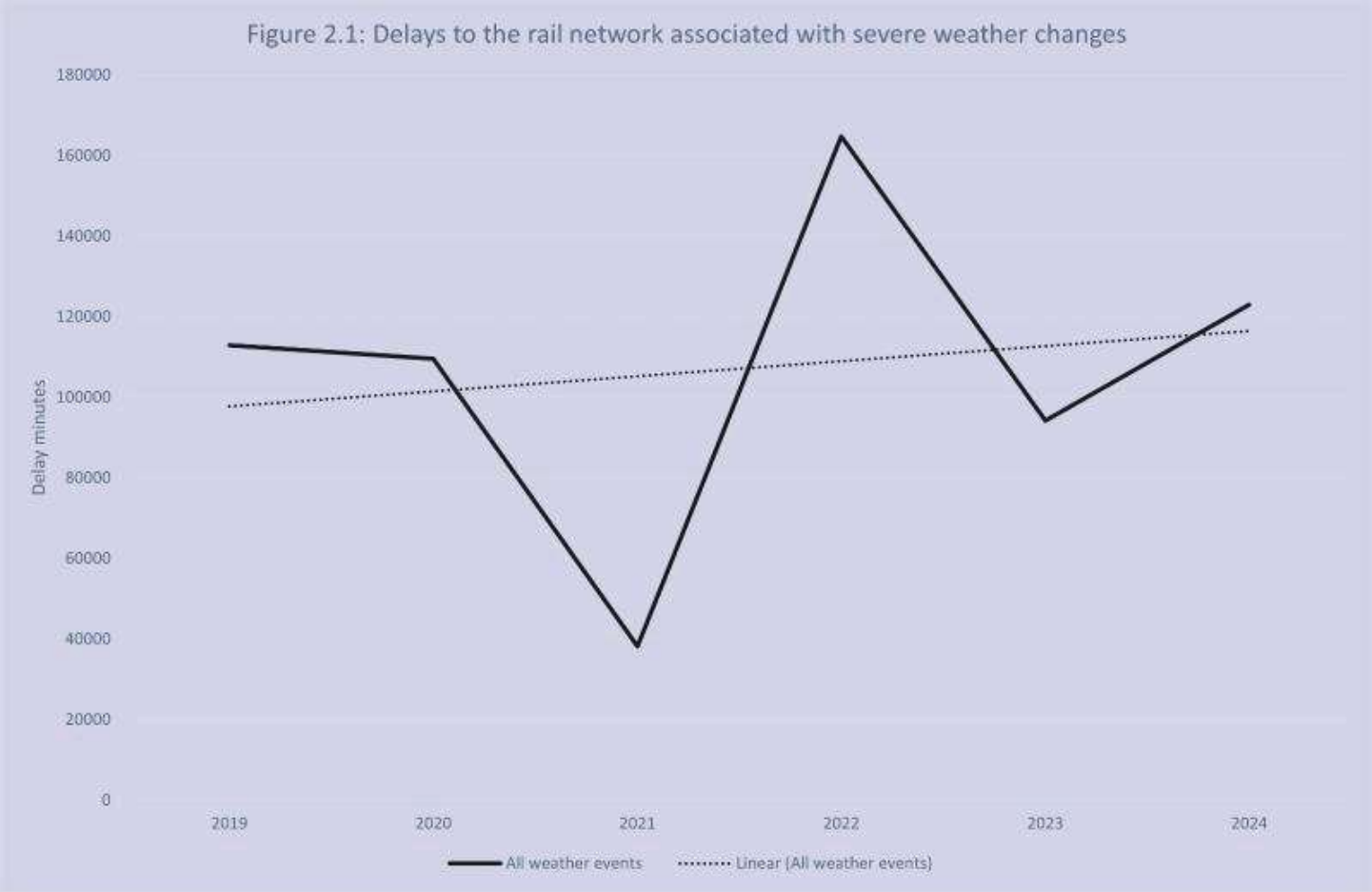
In 2024 there were 1,198,052 truck shuttle movements, 17.2% fewer compared to 2022. Passenger vehicles travelling on the shuttle saw a small increase of 3.4% over the same period, with 2,199,837 passenger vehicle shuttles in 2024. Figures have not returned to the numbers seen before 2020. This is most likely a combination of both Brexit and the Covid pandemic.

In 2024, there were 135 activations of operation TAP (the queueing system at Dover for HGVs travelling to the continent), this is comparable to the 128 seen in 2022. Both figures are higher than the 5 year average of 57 for the period 2017-2021. This is most likely a result of increased processing times at Dover due to additional checks required since leaving the European Union.

Resilience

This mission focuses on safeguarding and enhancing the resilience of the South East's transport network to ensure reliable and smooth journeys for all users.

This next set of indicators relates to our resilience mission and reports on the reliability of rail, including delays caused by severe weather. It also reports on the reliability of the road network and the number of road traffic accidents.



Road and rail reliability

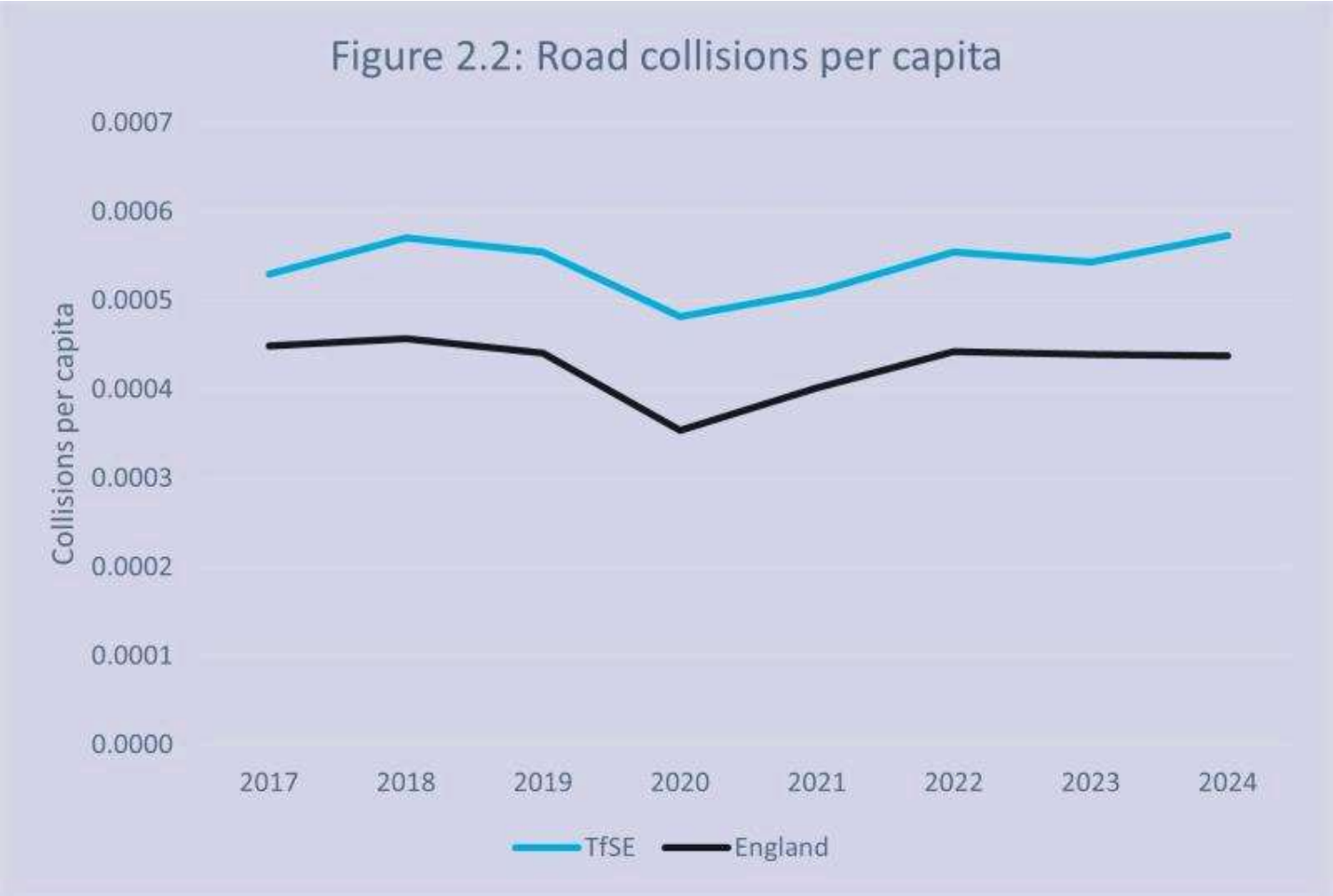
Figure 2.1 shows the delay caused to rail services by various severe weather. Note this data was provided by Network Rail for their southern region, which does not match the boundary of the TfSE geography.

As shown in the graph, there is a lot of variability year-on-year, but the overall trend is a gradual increase in delay minutes caused by severe weather events.

Since the last iteration of this report, there was a peak in delay minutes in 2022. Although there was a slight drop in 2023, the figure climbed again in 2024.

In the mid to late 20th century, extreme weather events tended to be infrequent and relatively predictable. In contrast, the 21st century has seen an increase in their frequency and severity, raising the likelihood of critical coping thresholds being exceeded and heightening the

risk of disruption to operations and services. Building resilience into the network is therefore essential to withstand these extremes.



Road collisions

Figure 2.2 shows the number of collisions per resident in the TfSE region, compared to England as a whole.

The number of recorded fatal or serious collisions in the TfSE geography (4,419) was the highest recorded in the past ten years.

Our region has consistently recorded a higher number of collisions per capita than the national average.

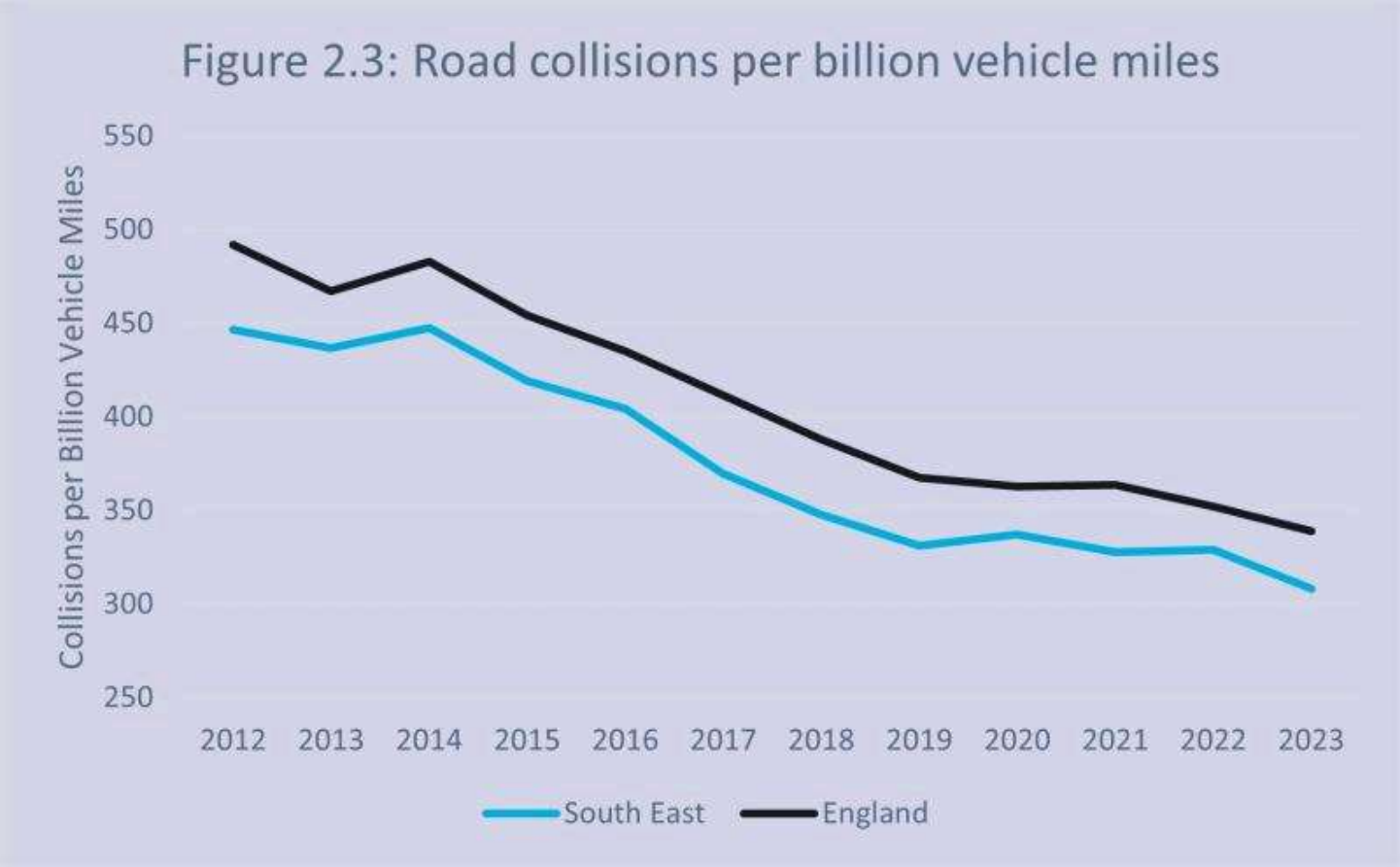
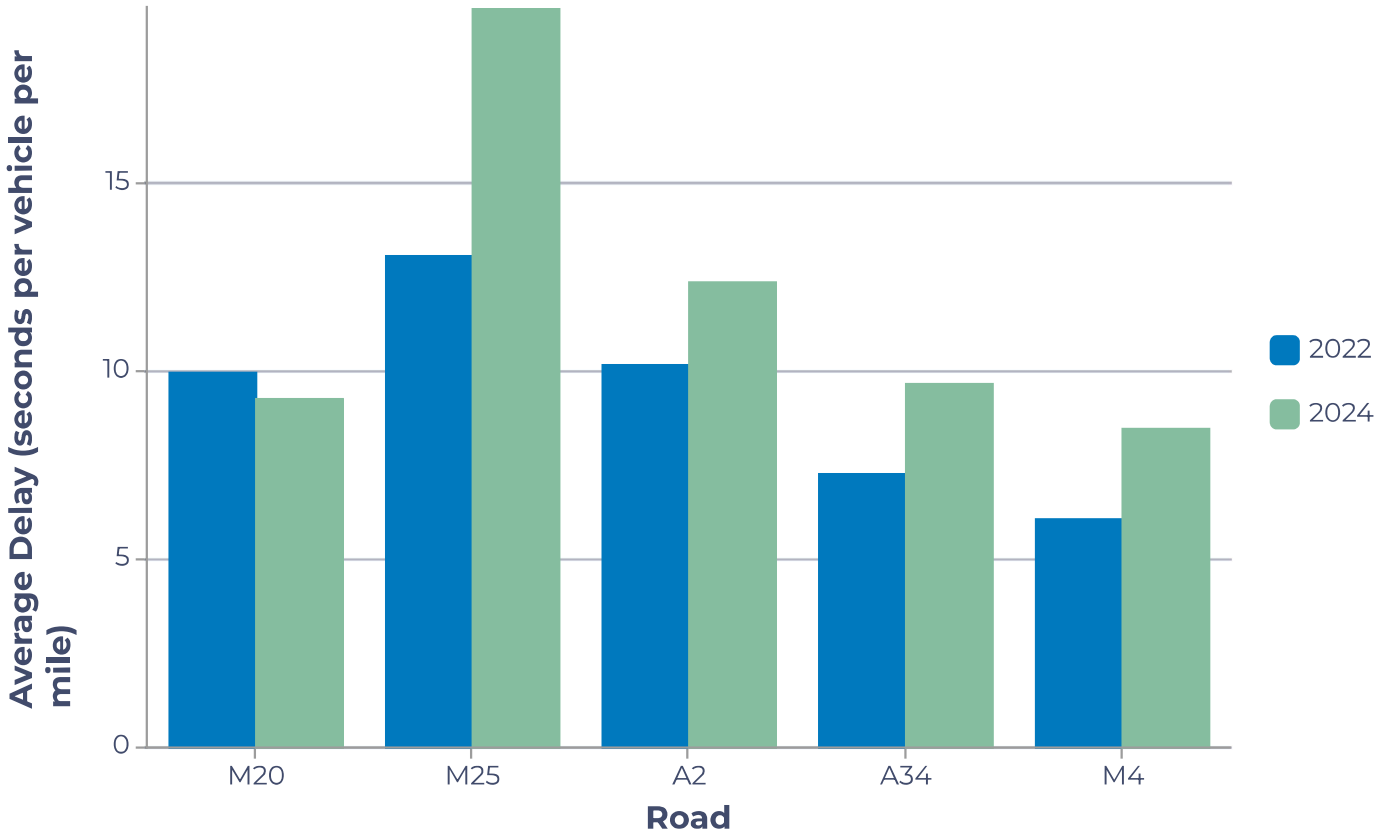


Figure 2.3 shows the number of collisions per billion vehicle miles in the South East (including Oxfordshire, Buckinghamshire and Milton Keynes from outside our geography).

Although the total number of collisions has increased, analysis against total vehicle miles shows a consistent decline in collisions per mile driven. This is a positive outlook for road safety and one that is desirable to see continue, however, it is still concerning that there are more collisions per capita in our geography than the national average.

Figure 2.4: TfSE Strategic freight network delay



Average delay on key freight routes

Figure 2.4 shows the average delay on key road freight routes in our region in 2024, compared to our previous report in 2022.

With the exception of the M20, the reliability of each of our key freight routes has worsened between 2022 and 2024.

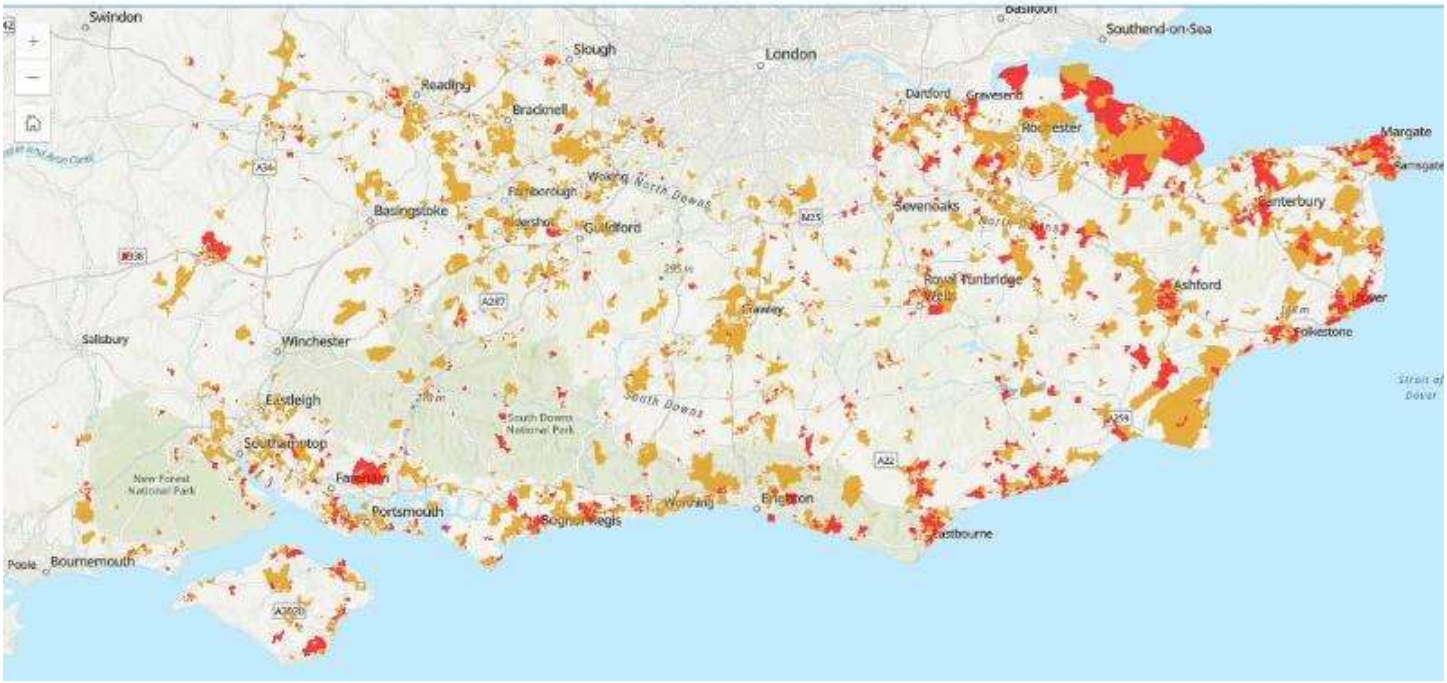
Inclusion and integration

This mission aims to create an inclusive, affordable, and integrated transport network across the South East, providing safe and seamless door-to-door connectivity for everyone.

The following indicators relate to the inclusion and integration mission by examining area deprivation and

accessibility to key services by public transport, as well as changes in the affordability of public transport.

Figure 3.1: Transport Related Social Exclusion (TRSE)



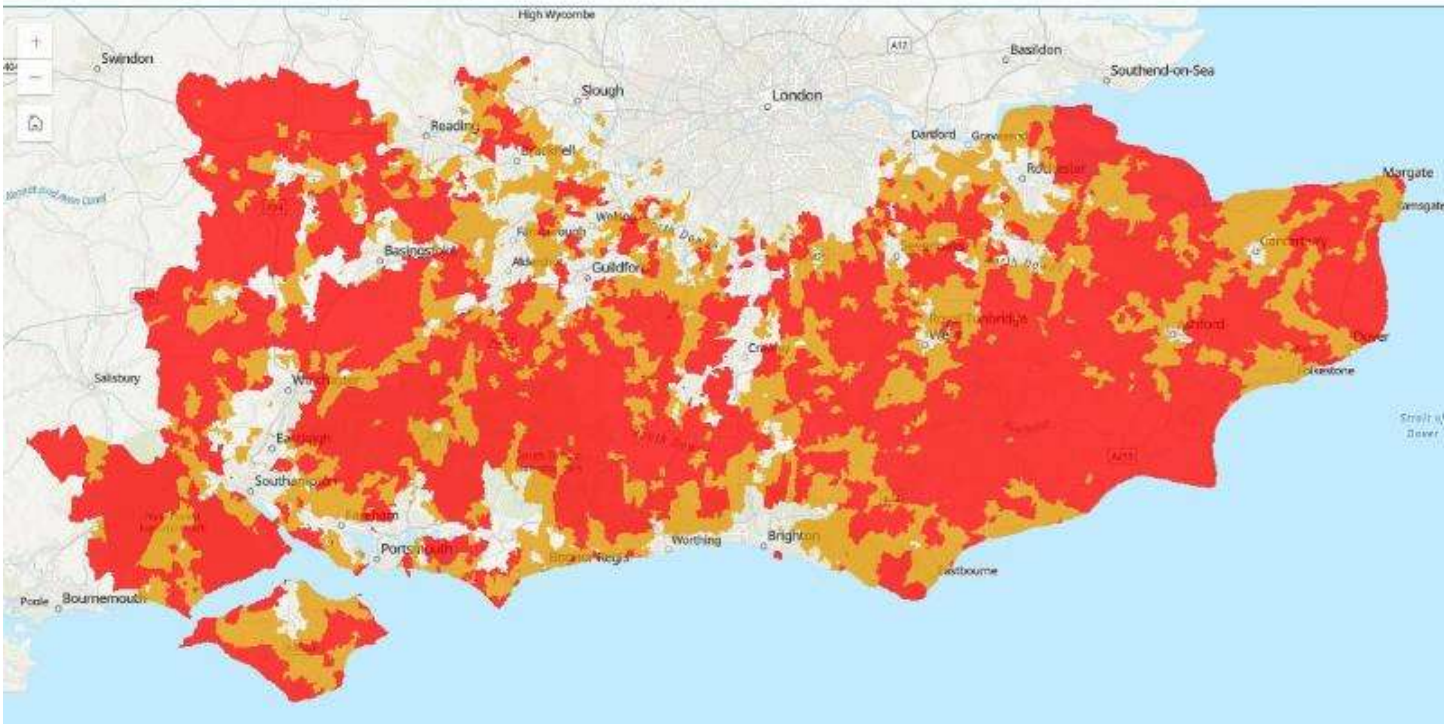
Transport related social exclusion

Transport Related Social Exclusion (TRSE) is a concept developed by Transport for the North to identify output areas where individuals or communities are unable to access the opportunities, services, and social connections they need because of limitations in the transport system. It arises when barriers such as poor connectivity, high costs, limited availability, or personal vulnerabilities (for example low income, insecure work, health conditions, or caring responsibilities) restrict people's ability to travel. The result is reduced participation in employment, education, healthcare, and community life, reinforcing wider social and economic inequalities.

Our region has 13.2% of people in the top 10% at risk of TRSE in England, highlighted in figure 3.1 in red, with 36.27% of our population in the top 30% at risk, highlighted in amber.

This demonstrates that there is need for intervention to provide better accessibility to transport for our residents, particularly in coastal regions where the most at risk output areas are clustered.

Figure 3.2: Transport accessibility vulnerability



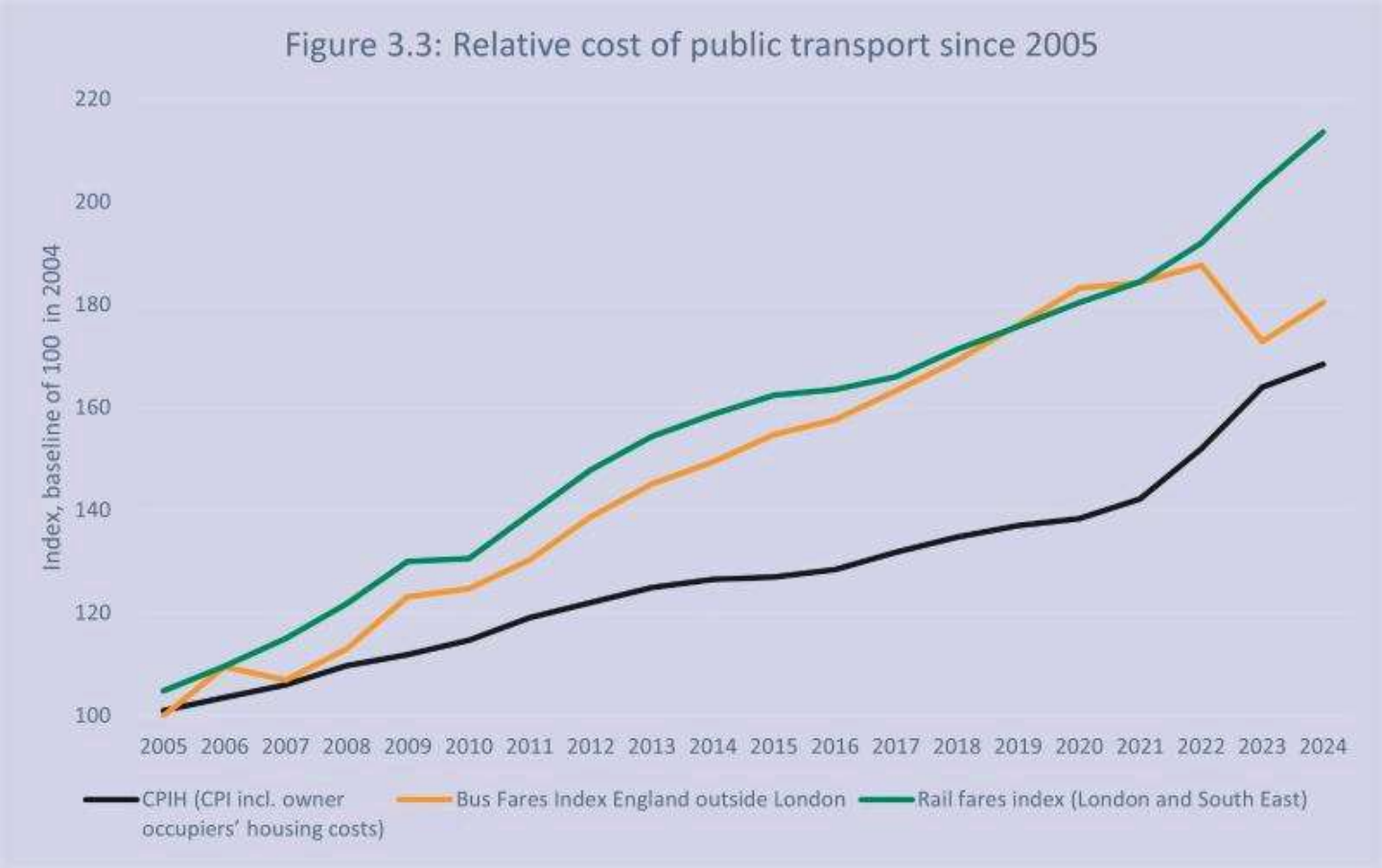
Accessibility

Figure 3.2, takes only the accessibility indicators that feed into the TRSE score. The shaded areas show the geographical areas at risk of exclusion based on accessibility when compared to the England average. The map shows there are large areas of our region with poor access to key facilities. The areas affected are largely rural with low population density.

As a region we score as expected with 10% of our population (red shading on map) in the top 10% England-

wide based on accessibility scores. However, 42% of our population are in the top 30% (amber) England-wide. This reflects the challenges that those living in rural areas have in accessing essential services using public transport, and highlights a root cause for car dependency.

The full report and data tool produced by Transport for the North is available here.

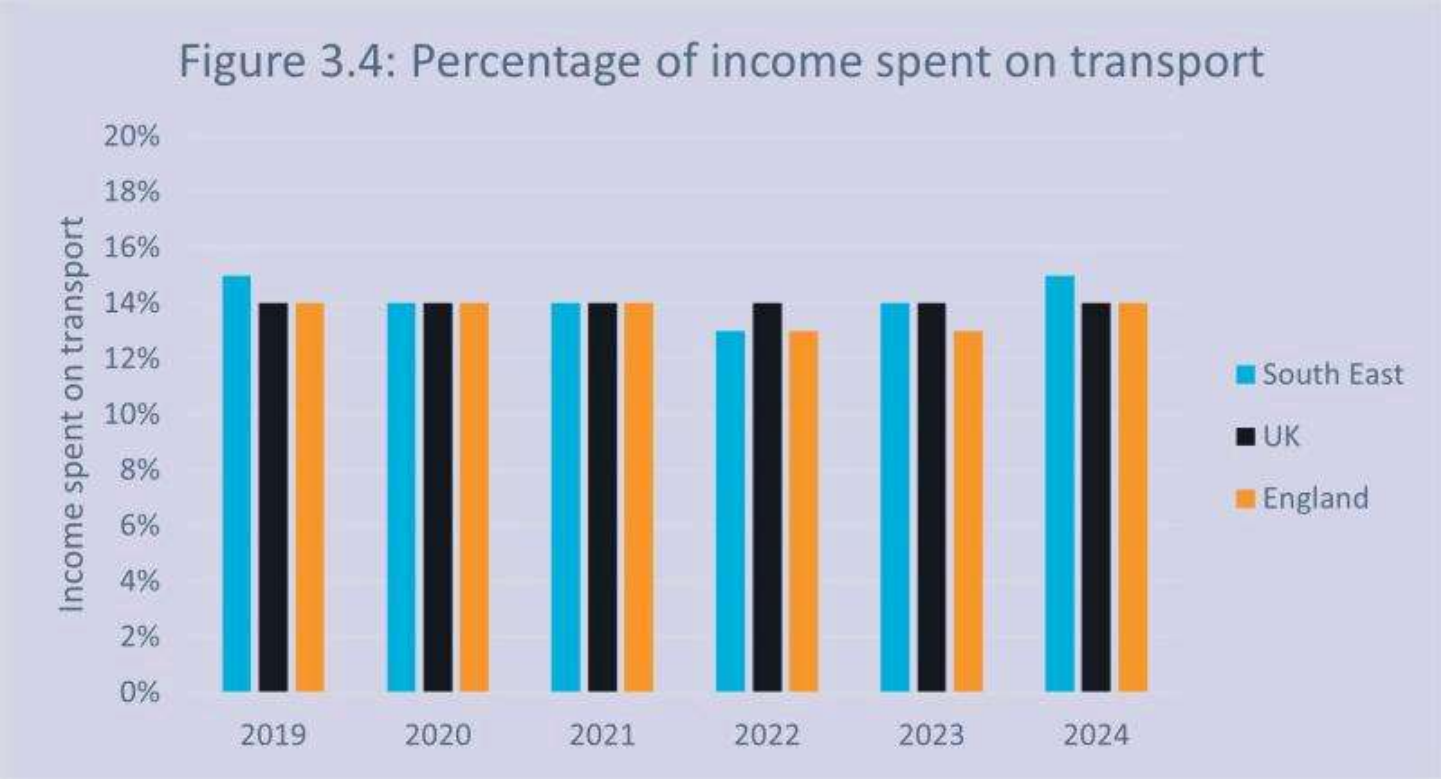


Public transport fares inflation

As can be seen in figure 3.3, in the past 20 years the price of bus and rail travel have exceeded the increase in the consumer price index (including housing costs) (CPIH).

However, since our last *State of the Region* report, we have seen a decrease in the cost of bus travel. This is due to the introduction of the £2 bus fare cap. This has begun to rise again with the increase in the fare cap from £2 to £3.

The cost of rail has continued to increase year on year.



Income spent on transport

Figure 3.4 shows the percentage of household income spent on transport based on a three year rolling average.

Since the last *State of the Region* report, there has been a return to pre Covid levels of expenditure.

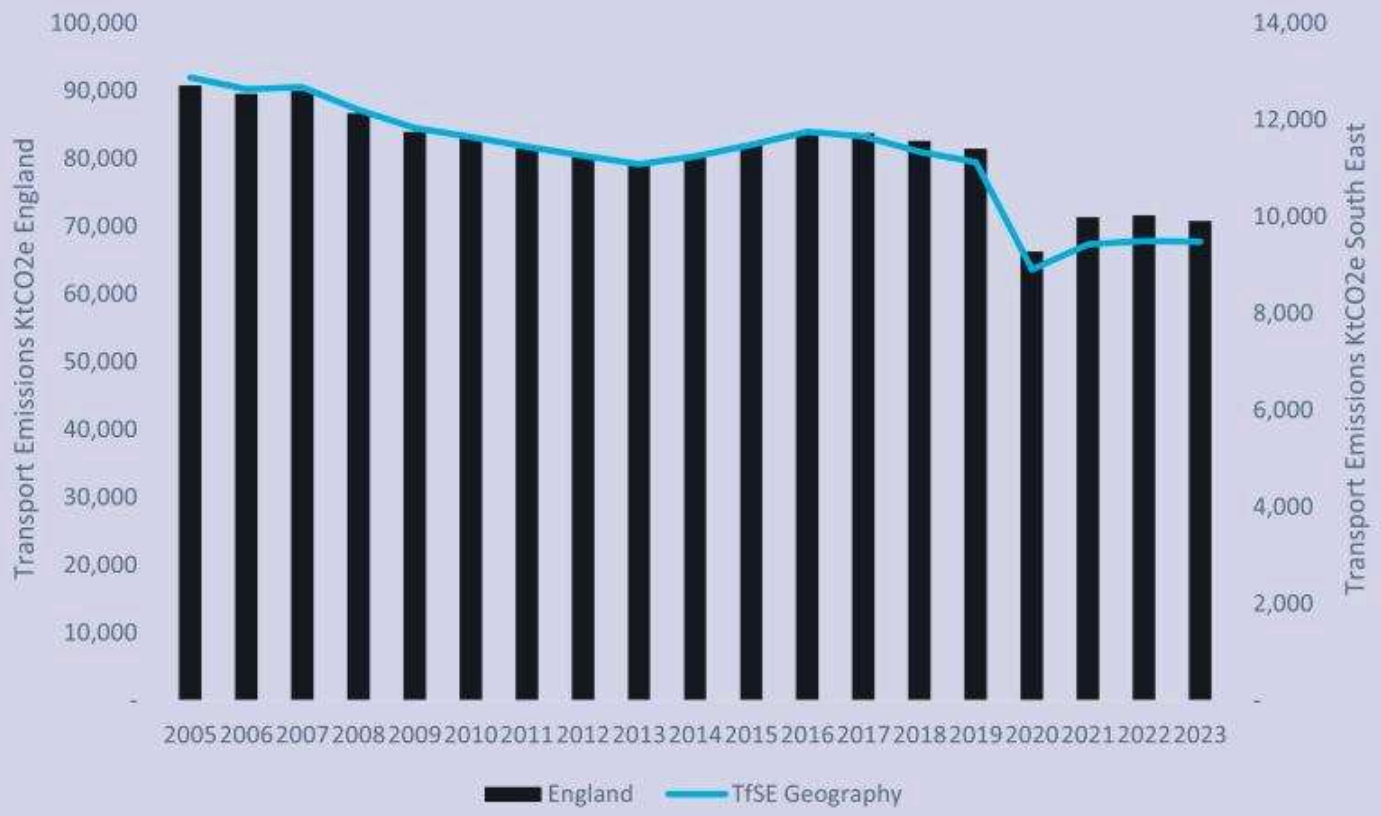
The South East region has a slightly higher percentage of household income spent on transport than the rest of England and the UK. The percentage for England as a whole is skewed by London where there is an average of 10% of household income spent on transport.

Decarbonisation

This mission aims to deliver a net zero transport future for the South East by 2050. This will be achieved by accelerating zero-emission travel, incentivising sustainable travel choices and embracing new technologies to reduce emissions and mitigate climate change.

The next set of indicators relates to our decarbonisation mission. Firstly, it measures total transport emissions and air quality in the region to assess the overall carbon impact. Secondly, it examines the drivers of these changes, including the uptake of electric vehicles in the region as well as the development of micromobility schemes, which provide a much lower-carbon alternative to private cars.

Figure 4.1: Total annual carbon dioxide emissions from transport



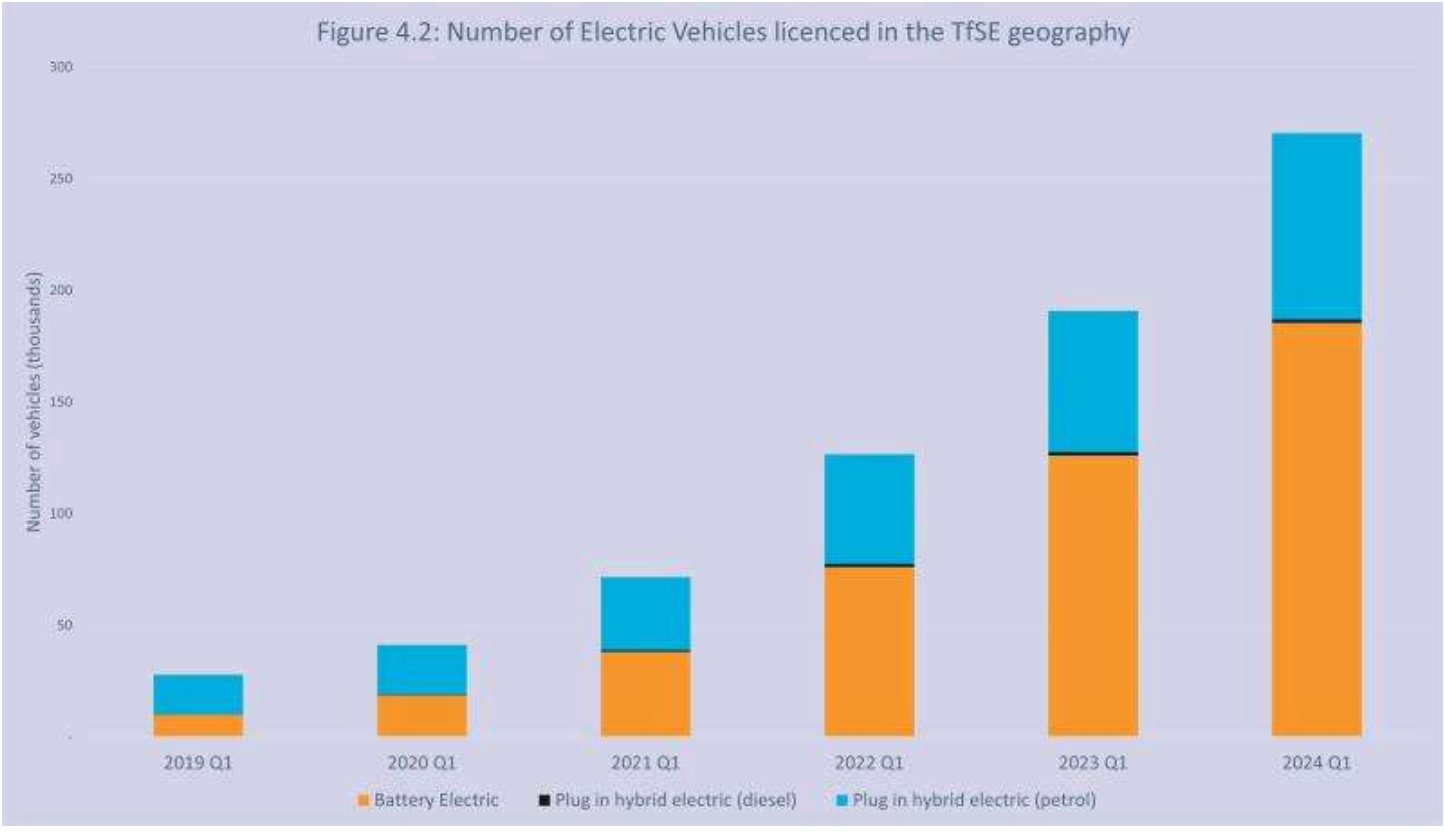
Carbon emissions

Figure 4.1 shows the total carbon dioxide emissions from transport in KtCO2e (kilo-tonnes of carbon dioxide

equivalent). Transport emissions include freight and passenger transport, both for private and business purposes.

The graph shows that in 2020 there was a sharp decrease in transport emissions, a result of the Covid pandemic. In the years of recovery since, we can see that transport related emissions have not returned to pre-Covid levels. As a comparison, emissions in 2019 in the TFSE geography were 17.34% higher than in 2023.

This is most likely a result of cleaner fuels. Employees being able to work from home in some professions may also be contributing to a reduction in total transport carbon emissions. TfSE's Regional Travel Survey responses show only 35% of our population commute to work everyday, 32% of respondents said they travel less often for commuting or education than they did pre-pandemic and only 12% said they travel more.



Licenced vehicles

Figure 4.2 shows the number of licenced electric vehicles (EV) in our geography.

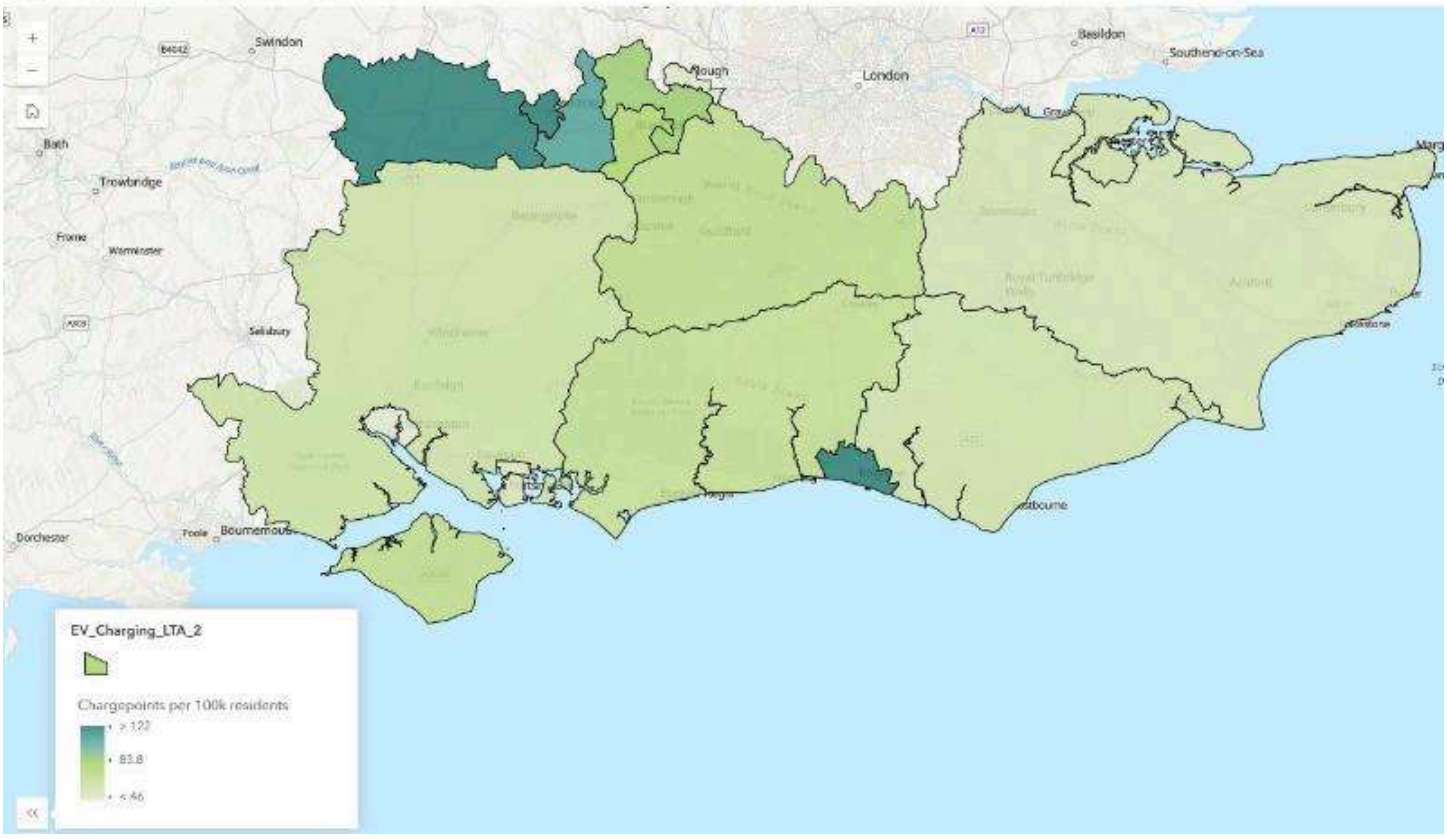
The shift to electric vehicles is seen as an important factor in reducing the carbon emissions produced by vehicles.

There has been a steady year-on-year increase in the number of licensed EVs and plug-in hybrid electric vehicles (PHEVs) in our region.

However, it should be noted, that EV and PHEV combined still only make up 5% of the total vehicles licenced in our region as of quarter one in 2024, this is an increase from 2.4% as of quarter one 2022.

Despite the uplift in electric vehicles licences, the majority are still petrol (58.5%) or diesel (36.5%).

Figure 4.3: Public charging points per 100k residents



EV charging

The uptake of EV relies on an increase in the number of EV public charging points available. Figure 4.3 shows the number of publicly available EV charging points by local authority area, displayed by number of chargers available per 100k of usual population.

The best provision in our region is available in Reading, closely followed by Brighton and Hove, and West Berkshire. These three authorities have approximately 150 EV chargers available per 100k residents.

The authorities with the least charge points available have fewer than 50 chargers available per 100k residents.

From our Regional Travel Survey (RTS), 63% of EV owners charge at home.

7% charge using public infrastructure, however in Brighton and Hove there are 22% of EV owners using the public infrastructure. This could be attributed to fewer properties having private off street parking in the city.

TfSE has supported LTAs by providing a regional *Electric Vehicle Charging Infrastructure Strategy*, data-driven planning tools, and forecasting to help them identify future charging needs across the South East region. TfSE also facilitates collaboration through an EV Forum and a Centre of Excellence, offering a platform for local authorities to share best practice and lessons learned with one another.

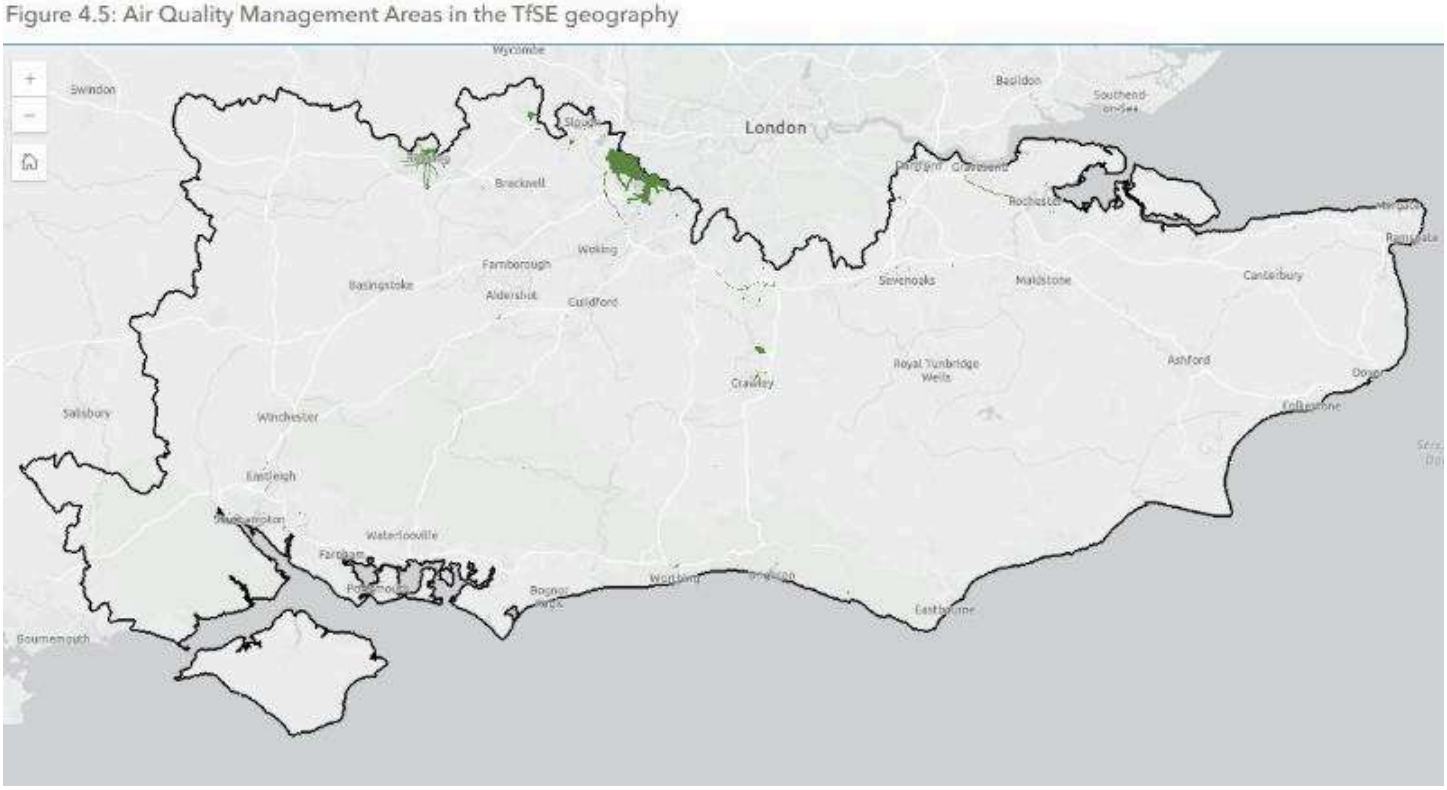
Micromobility schemes

Figure 4.4 shows the number of e-bike and e-scooter hires by year for the Solent shared mobility scheme, as well as the total km travelled on both modes under the scheme.

Since the last version of this report, there has been growth year on year in both the number of rides and the total km travelled.

Greater uptake of micromobility can reduce the number of cars on the road. It should be noted that at time of writing It is illegal to ride a privately owned electric scooter in public, for example on pavements, on roads or in parks.

Figure 4.5: Air Quality Management Areas in the TfSE geography



Air pollution

Figure 4.5 shows the Air Quality Management Areas (AQMA) in our geography (correct as of 08/03/2025).

Since the last iteration of the report, the number of residents living within an AQMA has decreased significantly, from 360,000 to 198,000.

In 2023, 5.1% of deaths recorded in the South East were linked to pollution, down from 5.4% in 2021. This is a significant improvement on pre-pandemic levels, which were recorded at 7.7% in 2018.

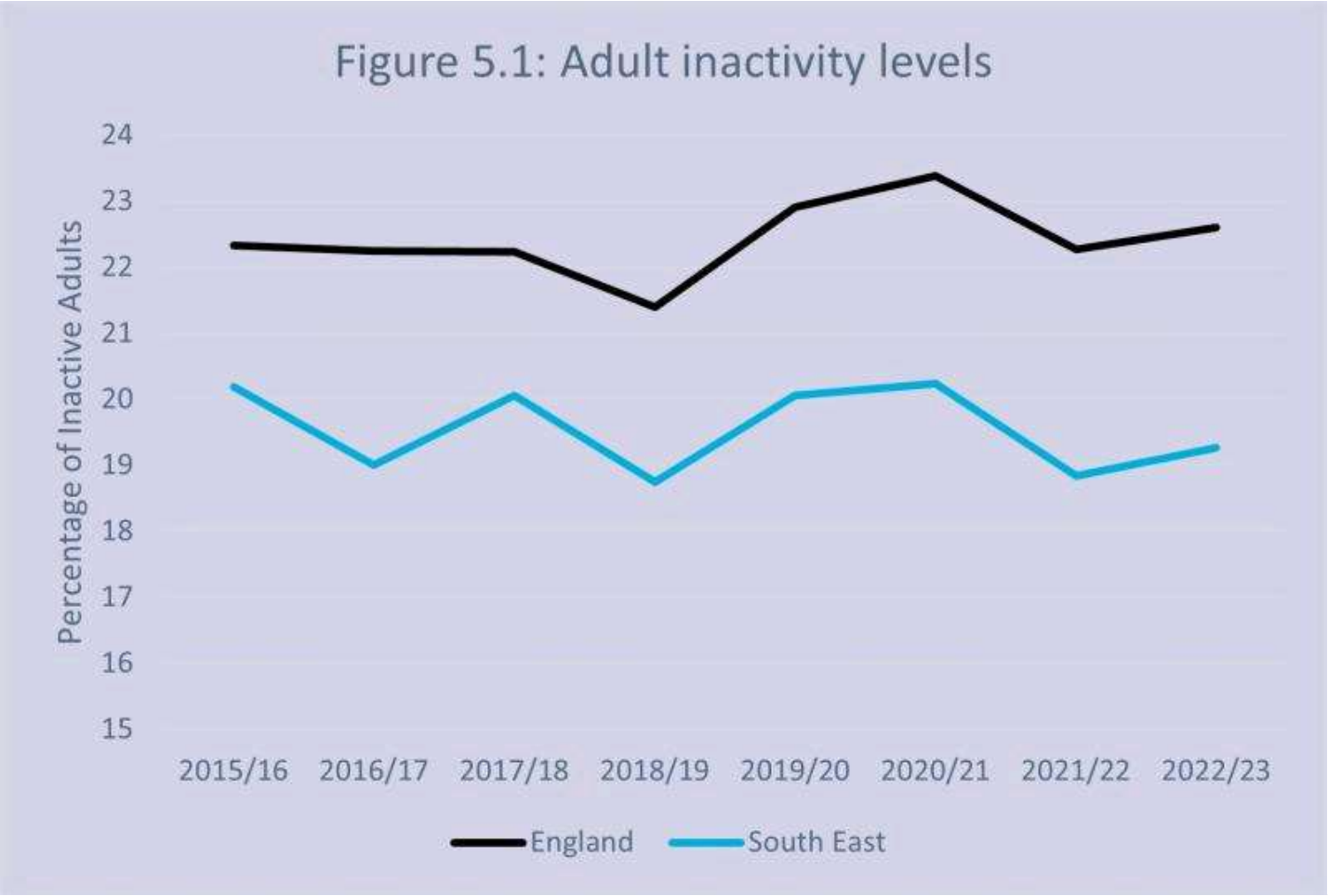
A likely reason for the improved air quality is both the move to EV and the decrease in tailpipe emissions from petrol and diesel vehicles adhering to the euro emissions standards. In 2024, vehicle miles in TfSE totalled 43,252 million, exceeding the 10-year average from 2010 to 2019 of 42,472 million miles (DfT table TRA8901). This suggests that

the improvement in air quality cannot be attributed to reduced traffic levels following the Covid pandemic.

Sustainable development

This mission aims to champion transport interventions to unlock investment, enable sustainable growth and create healthy, vibrant, well-connected communities in the South East.

The next set of indicators relate to our sustainable development mission by looking at how active adults are. The aim is to reduce inactivity levels by promoting active travel as a viable alternative for shorter journeys. Evidence from our Regional Travel Survey is used to examine modal share and the reasons people choose the car over active travel options.

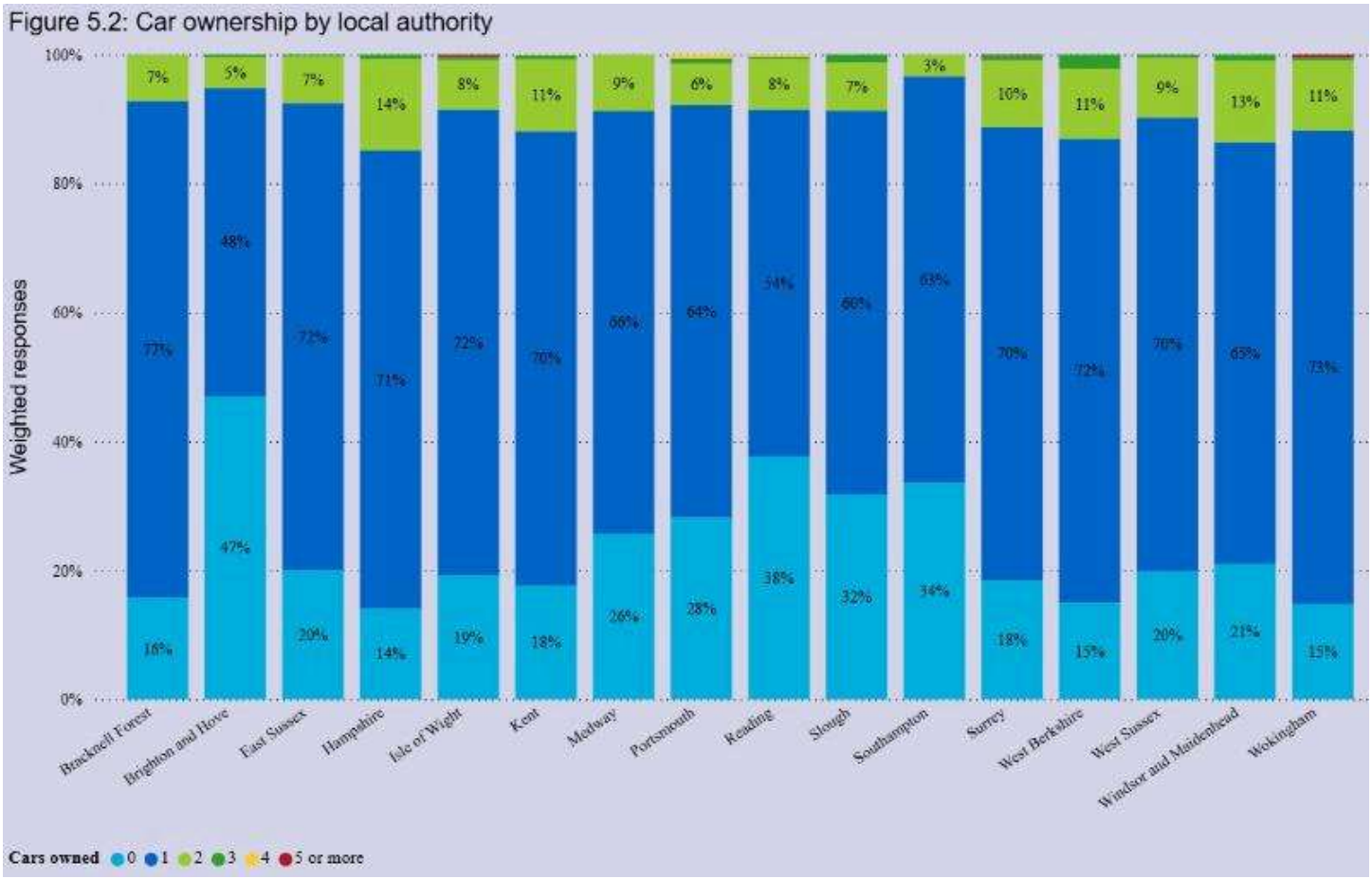


Adult inactivity

Inactivity in our region remains consistently lower than the England average and follows the same annual trend, as can be seen in figure 5.1.

Compared to two years ago, the level of inactivity among adults has decreased, however there does not seem to be a trend of sustained decrease.

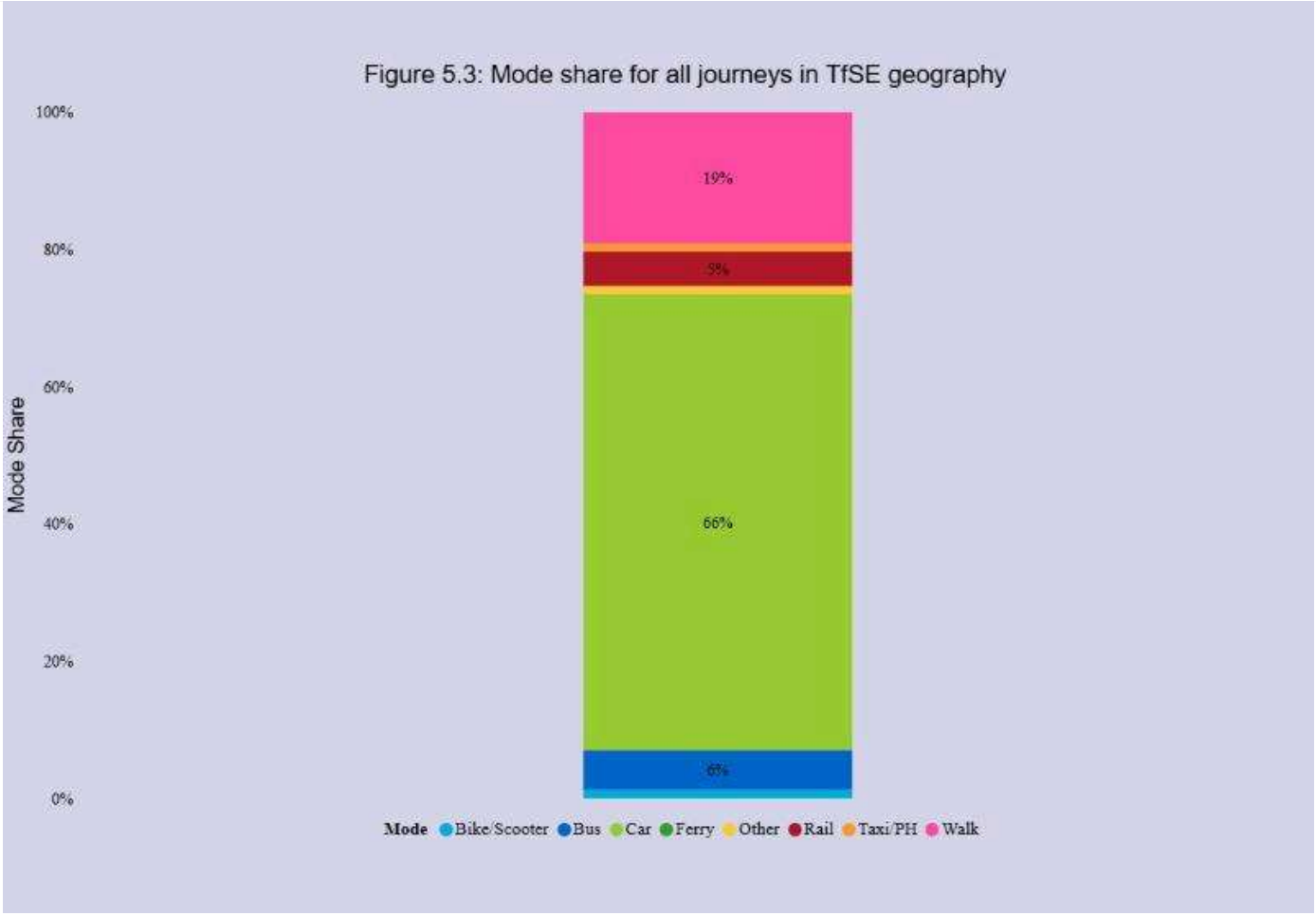
Figure 5.2: Car ownership by local authority



Car ownership

Figure 5.2 shows the number of cars owned by individuals from respondents to our Regional Travel Survey 2025.

The majority of households surveyed have one car or none. There are, however, many instances of households owning multiple cars, particularly within the more rural shire authorities.

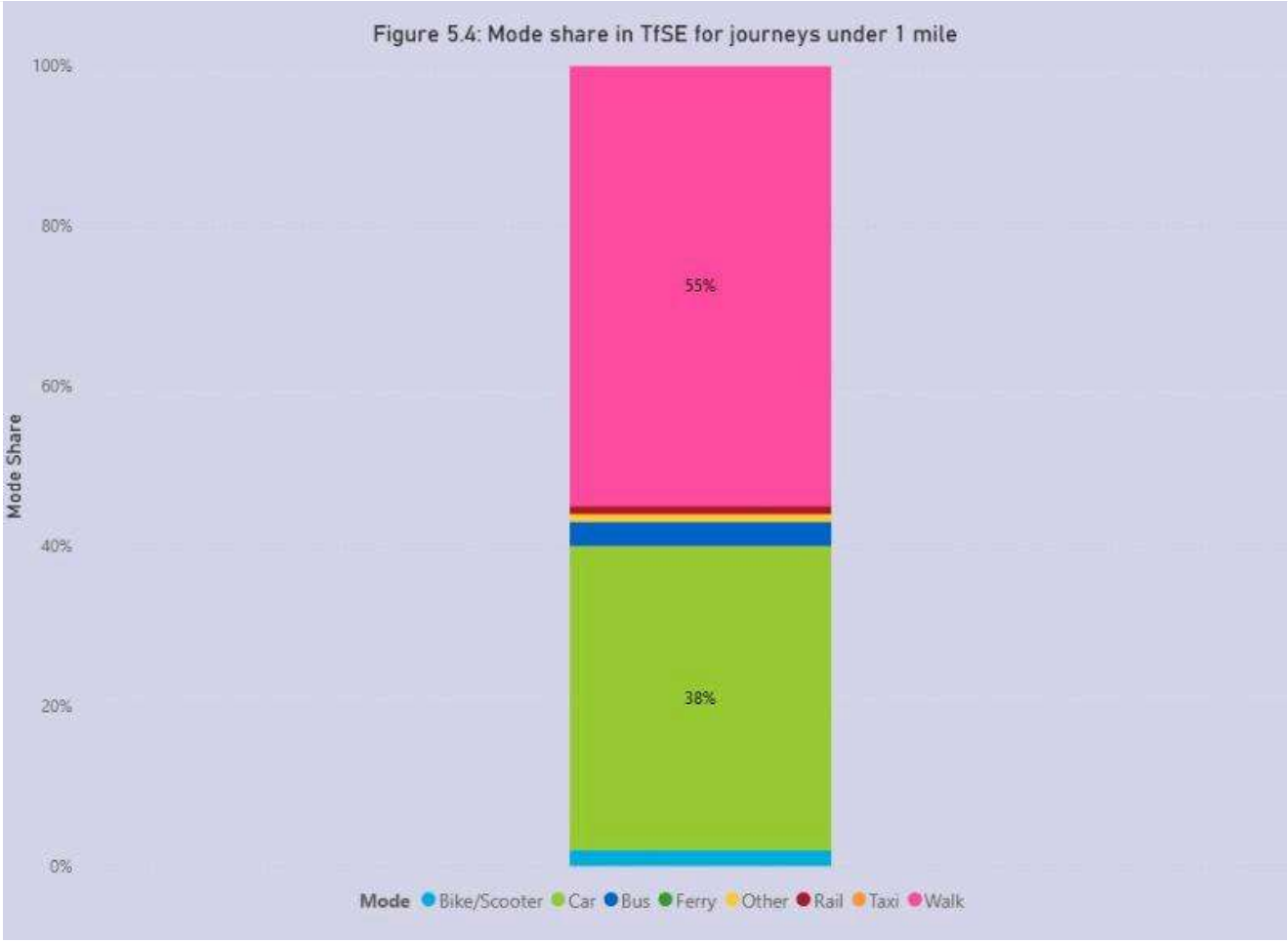


Mode of travel

Figure 5.3 shows the mode of travel used for all journeys, taken from our Regional Travel Survey

Two thirds of all journeys recorded were made by car in our region, whereas only 11% were made by public transport.

Our survey results show that there is a higher percentage of journeys made by car in the TfSE region than the national average of 59%, as reported in the 2024 National Travel Survey (NTS) (table NTSS0303).



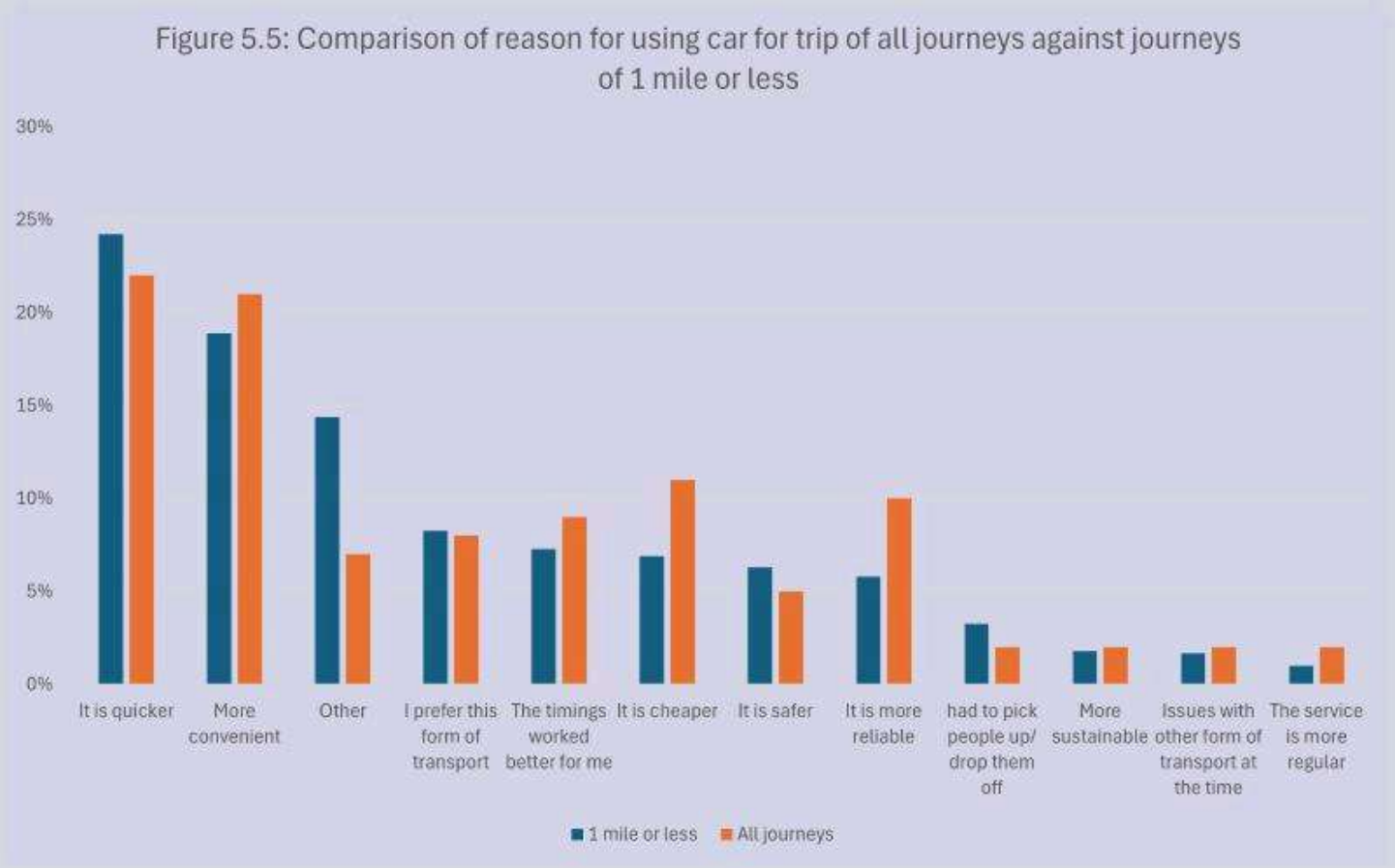
Mode of travel for short journeys

Figure 5.4 shows the mode of travel used for short journeys, which are described as those of less than one mile.

In our region 38% of short journeys are made by car, where as 55% are made by walking.

This is particularly poor when compared to the National Travel Survey (table NTS0308), where only 17% of short journeys were made by car or van as primary mode, and 81% mode share for walking.

To reduce the number of car journeys of less than one mile, provision for active travel must be built into the planning and design of new developments.



Reason for choosing the car

Figure 5.5 shows the reasons given for making car journeys, comparing all car journeys with those of one mile or less, based on responses to our Regional Travel Survey.

For all trip lengths, speed and convenience score highly as reasons for opting for the car. Where as, for longer journeys cost and reliability are more important factors.

As set out in our Transport Strategy we are working to encourage active travel for short journeys to promote decarbonisation and healthy lifestyles. To achieve this, TfSE supports sustainable neighbourhood planning principles to ensure residents can meet their daily needs within a short walk or cycle from home.

Summary

This State of the Region report shows that there have been significant changes in the TfSE region in the last few years.

Changes in the region can be attributed to a number of factors, such as the Covid pandemic and shifts in working patterns, which have influenced travel habits. Policy interventions, including the bus fare cap and the expansion of EV charging points, have also had an impact, as reflected in the reduction of total transport emissions across the region.

However, there is still a long way to go to achieve all the missions. There is a heavy reliance on car as a mode of transport in our geography, and as a result journey time reliability on the SRN and MRN has worsened. Additionally, many rural parts of our geography have limited options to make more sustainable travel choices, and where public transport is available rail continues to become less affordable year on year. Bus travel however, has become more affordable thanks to the fare cap, currently set at £3 per journey with participating operators. The DfT evaluation of the initial £2 bus fare cap reported the scheme contributed an estimated 5% increase in bus patronage outside of London.

TfSE will support the delivery of the missions in our Transport Strategy by focusing on areas needing urgent action, and where TfSE is uniquely positioned to drive change. TfSE's approach emphasises practical, achievable solutions. TfSE will support its partners with tools such as scheme development funding, an advanced analytical framework, and the Centre of Excellence, which enhances regional planning capacity and capability.