



Understanding Changes in Road and Rail Travel

Attitudinal Research Pilot Study

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February 2013



Independent Transport Commission
Registered Charity 1080134

UNDERSTANDING CHANGES IN ROAD AND RAIL TRAVEL ATTITUDINAL RESEARCH PILOT STUDY

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Acknowledgements:

This pilot research was commissioned from Social Research Associates Ltd and led by project director Kris Beuret OBE. The findings were presented on the 11th February 2013 at a special seminar hosted at the RAC.

The ITC would also like to record its gratitude to its Core Benefactors.

This work stems from research into car and rail travel trends undertaken by Professor Peter Jones and Dr Scott le Vine in 2012 and co-sponsored by the ITC, the RAC Foundation, the Office of Rail Regulation and Transport Scotland.

February 2013



Introduction

Our recent co-sponsored 'On the Move' report¹ showed significant changes in British car and rail travel trends since the 1990s.

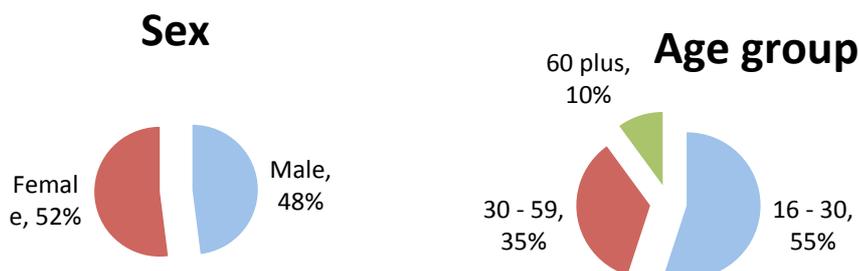
Summary of key findings

- Young men under 30 are driving less.
- Women and older people are driving more than in previous generations.
- The number of rail journeys (but not their length) is increasing and there is some correlation with reduced driving for business purposes.
- Car travel has seen a major decline in London, while in rural areas it is on the increase.
- There is some evidence that immigrants exhibit different travel behaviour to those born here.

The ITC Pilot Study

Following publication of these findings, the ITC commissioned Social Research Associates to carry out a pilot study to explore some of the reasons behind these changes.

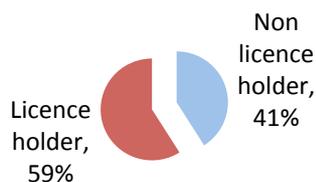
100 family or group interviews were carried out in January-February 2013 weighted towards 16-30 year olds. Each interview session included setting out a key finding and then asking participants to rate the influence of different reasons for the change on a scale of 1 (strongly agree to 5 (do not agree).



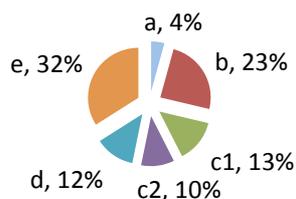
¹ This research was co-sponsored by the ITC, the RAC Foundation, the Office of Rail Regulation and Transport Scotland. For more information see <http://www.bbc.co.uk/news/business-20526328> and also the full report at <http://www.theitc.org.uk/docs/47.pdf>.



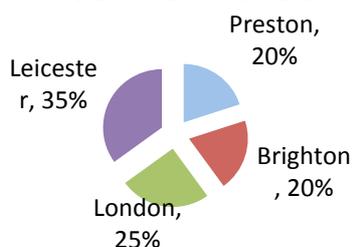
Driving status



Socio economic group



Interview area



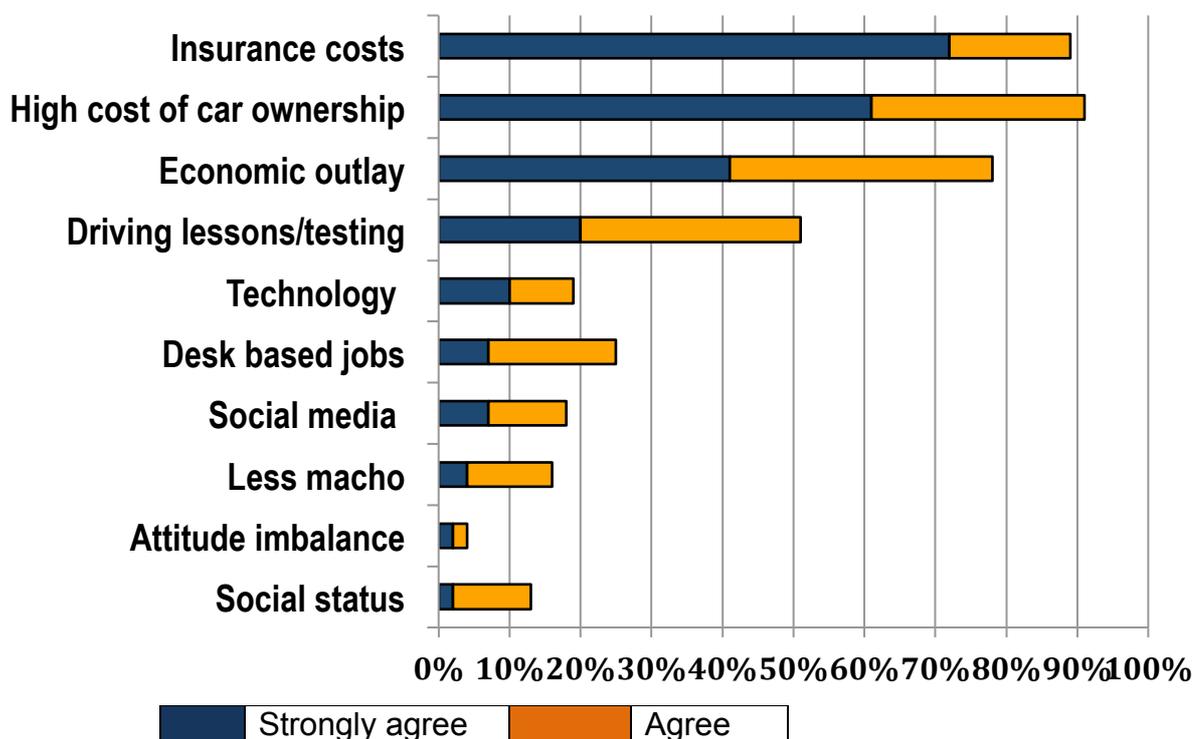
The Results

In interpreting the results it is important to bear in mind that although some reasons for behaviour may be rated highly, the final travel decision is frequently due to a combination of factors. Thus the discussions which took place during this research throw interesting light on some of these 'tipping factors' which are otherwise lost in more traditional rating exercises.²

² This factor was well demonstrated by research for Transport Direct based on detailed travel planning diaries and which developed the concept of a palette to explain final choices. This concept was also build into a redesign of the Transport Direct portal. SRA (2005) Transport Direct Market Research – 3 vols (DfT)



Key finding 1: Licence holding by young men declined?



- The high costs of insurance, (currently higher for young men than young women) is a key factor plus the cost of car ownership and economic outlay.
- In addition a period of higher education (often at universities or accommodation in city centres without access to parking) tended to defer the decision to become a driver.
“The places I tend to go to aren’t very handy for getting there by car especially if I’m drinking”
- Another interesting finding was concern about the stiffer driving test, especially on the part of some young men with literacy deficiencies in relation to the theory test.
“I’d sail through the driving test but not so sure about the theory test – reading isn’t my thing really.”
- The increased use of technology and social media was also raised as a factor in explaining less licence holding – a car for some was no longer a ‘must have’ to keep in touch with friends.
- There is also evidence of an increased interest in cycling as a substitute especially in London and the bigger cities – again where many students are spending three or more years. Some young men were very knowledgeable about cycle makes, subscribed to cycling magazines and were critical of driving behaviour. A key factor in the attraction of cycling was independence as compared to using public transport.

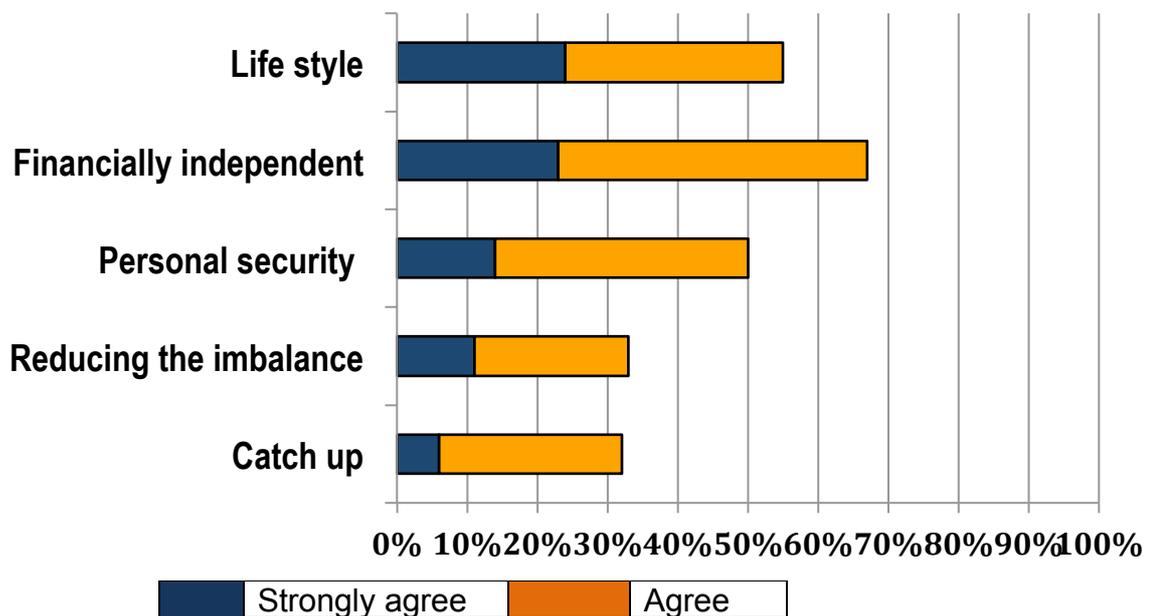


“I’d always prefer to cycle or even walk sometimes rather than go on a bus which seems so slow and the other passengers’ behaviour drives me mad.”

The key question is how long will such attitudes last as these young men form relationships and start families. What may be relevant is that many of these young men without cars are developing very good knowledge about public transport and organising their activities around routes.

“We used to go to a big bar off the ring road but now all the best places are in the city.”

Key Finding 2: Licence holding by women has increased in all age groups



A lot of the explanation for this finding is that young women’s rate of licence holding is catching up with men’s rates (depicted as ‘reducing the imbalance’ in the chart above)..

Women also tended to have a more utilitarian attitude to car ownership – choosing according to price, fuel efficiency, length of guarantee, reliability rather than appearance of performance.

“I’m driving a Nissan Micra but beyond that I’ve no idea about makes of car.”

A key theme raised in the interviews was the increase in the cost of insurance that was rumoured due to an EU directive – certainly not a vote catcher. “It’s ridiculous –why should we have to pay to cover these mad men drivers?.”

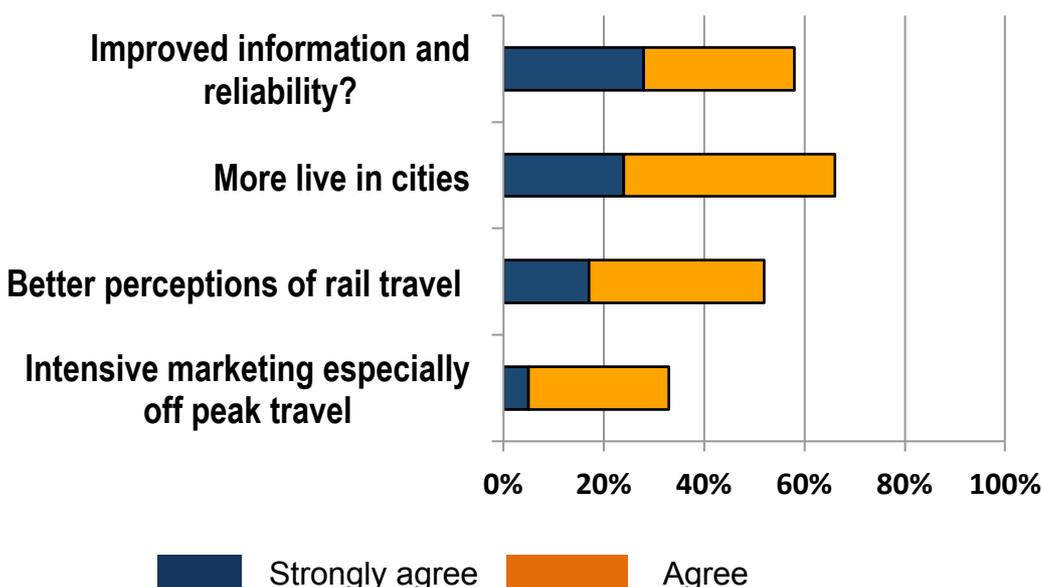
Compared to their male age counterparts, women were also more likely to use cars for multitask trips which fits with national figures about women having less leisure time. It was also in part accounted for by women being younger than men and thus single parents or mothers at an earlier age than men become fathers. *“I couldn’t fit everything in without the car – children to*



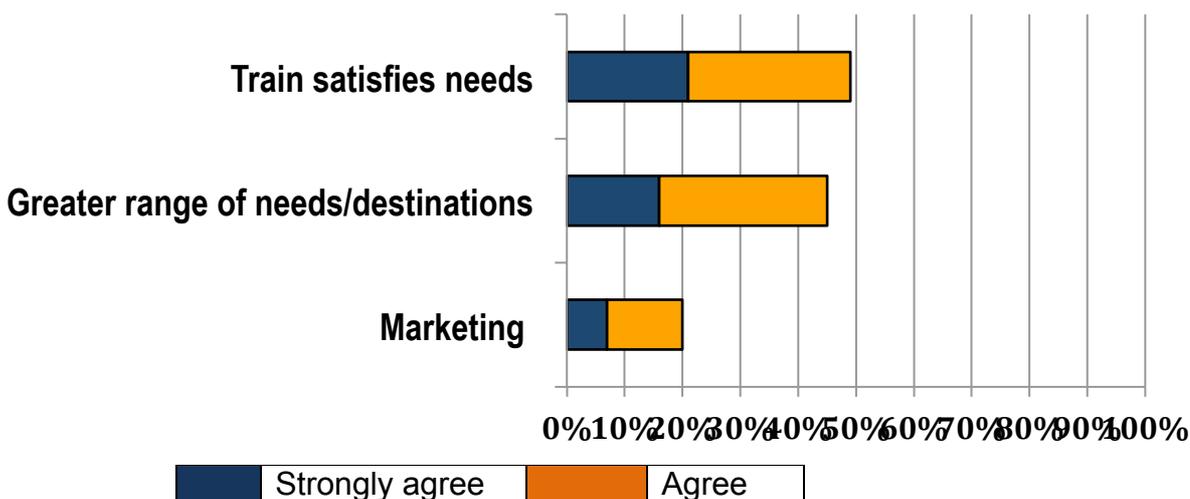
different schools, shopping, work and always the chance of a crisis with my father.”

Another key factor which was rated as an important reason for the increase in car ownership by women was personal security and it was clear that the availability of a car was seen as a major asset to extend the activities of young women especially in evenings. In addition it was a strong motive for parents to pay for driving lessons and either buy their daughters a car or lend their own.

Key Finding 3: There has been a growth in rail travel due to more people making journeys



Key Finding 4: There has been an increase in rail travel by people with car licences



There was a widespread view (sometimes grudgingly) that rail travel had improved over the years. Rail was seen as quicker, better integrated and more reliable compared to congestion on the roads.

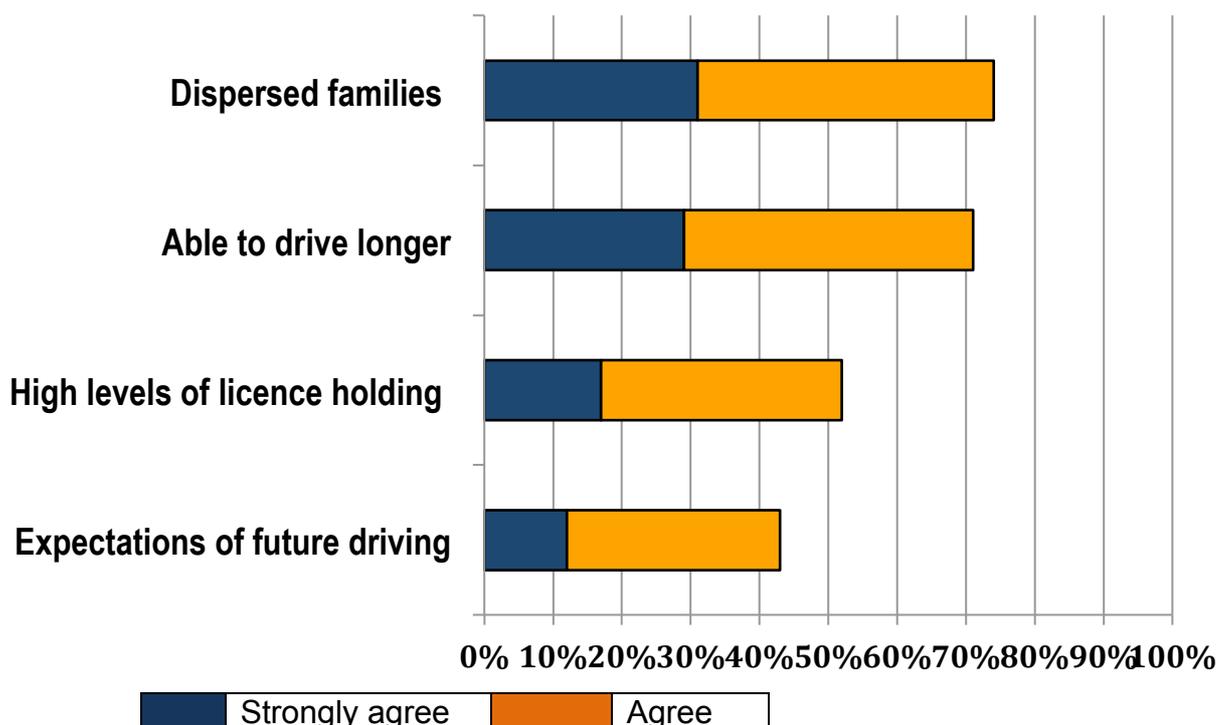
The increased accessibility of rail was also an important factor not just for disabled people but for those with wheeled luggage and buggies. Indeed in London some people organised their travel routes around accessibility standards. *“I’ve found a great app called Mumderground but I’d really like one covering national rail as well.”*

Railcard holders had a strong desire to make maximum use of their cards. *“I wanted to get my full value so I started to plan days out.”*
“I wouldn’t go home so often without advanced fares and the rail card discount.”

These last comments raise the issue of whether giving motorists free rail cards would actually increase overall rail travel and revenue.

Perhaps more importantly just as with the young male drivers, these new rail users are beginning to understand the rail system including ticketing, routes and destination opportunities.

Key Finding 5: Older people are driving more



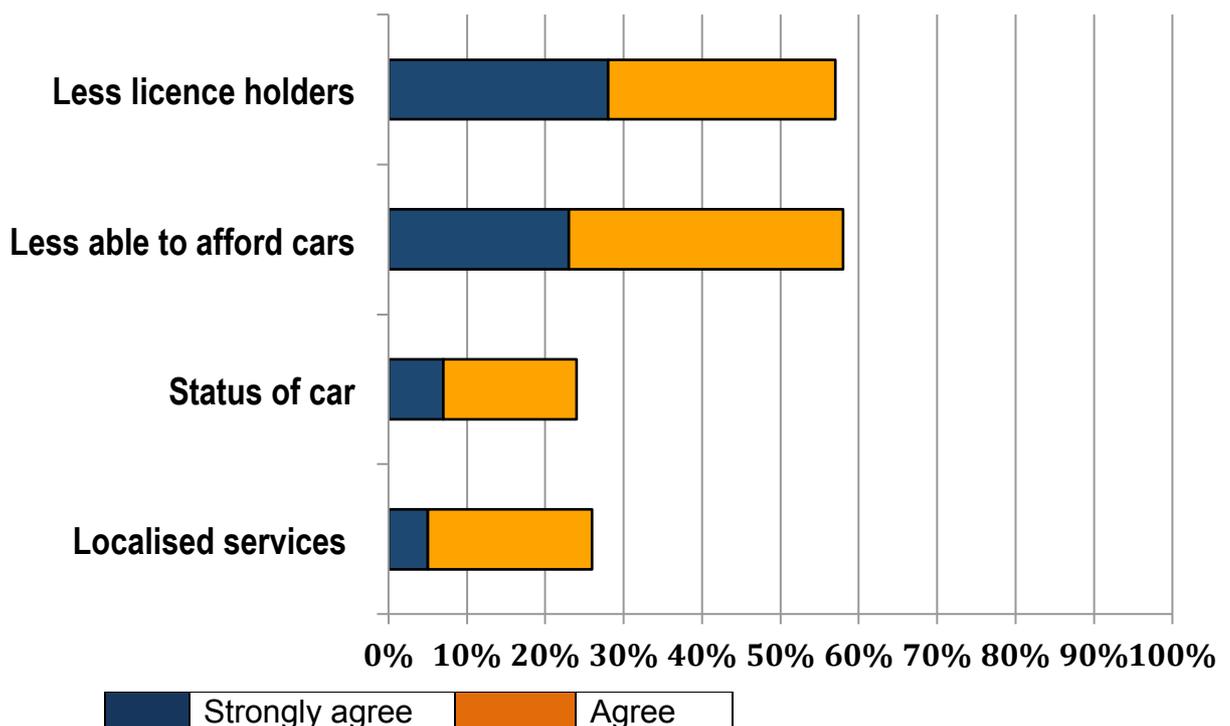
Older people frequently held more pro driving views than younger people including within their own family. *“We’re the driving generation.”* I still remember the thrill of my first car and I’ve been a motorist ever since.”



For such older people, especially in higher income groups, car ownership was a pleasure and a liberator especially as disability kicked in. *“Mobility cars are getting better all the time – there’s no need for anyone to give up driving.”*

As associated point was that many older people had organised their lives around the need to drive – for example living in villages or suburbs with poor public transport access and shopping in out of town retail parks. They thus had poor knowledge of public transport routes and often overestimated costs or journey times and assumed low standards. *“We went to Devon on a train in 1968. Never again.” “We’re too old to change now – we struggle to run the car so we have to use it.”* Some people in this group also had a image of public transport, especially buses as low status and for the same reason did not wish to obtain a free bus pass. Nevertheless there were also some older people who regretted their car dependence. *“We thought living here in Bamburgh Castle was brilliant but now I don’t like driving but I don’t want to move either.”*

Key Finding 6: Travel patterns differ by migrant, ethnicity and within ethnic groups



These findings based on only 15% of those interviewed being migrants of from minority ethnic groups. However, we were able to link the views expressed with early research carried out on this issue³ and some tentative findings emerged.

³ SRA (2005) *Transport Requirements of Minority Ethnic and Faith Communities: Research Findings and Good Practice Guidance* (DfT)



Asian migrants (often longer standing residents) were far more pro car use than more recent migrants (from European countries). The latter had different priorities especially housing and did not so readily equate status with car ownership.

Another factor deterring European migrants was the UK driving test and the UK left hand driving system.

In terms of journey length, all migrant groups tended to visit their local areas often by walking and in part due to the presence of specialist food, goods and services.



CONCLUSIONS

There is evidence of a paradigm shift between generations.

The big question is whether this will revert to norm as young people reach different life stages.

The indications are that more sustainable patterns of travel could be encouraged by policy measures (as has clearly taxation of company cars). The time is ripe.

If these new patterns of travel are sustained there are considerable knock on effects for transport investment, freight distribution and road management. There are also considerable land use and fiscal implications beyond transport policy.

These issues are well worth exploring further.

Next Steps

We would like now to commission a new phase of research which will, over the course of the next year, establish some clear answers as to which factors are driving these changes, whether they will continue, and help inform improved travel forecasting and analysis.

We foresee this next phase of research involving three strands of work:

1. Attitudinal Research

This would involve extending our pilot study by interviewing and surveying people in family or social groups covering the broad constituency where change has been observed. We would establish what is affecting these new patterns of travel choices and how attitudes have changed over time. A crucial aspect of this research is to investigate whether the changes will continue throughout future life stages and thus link with the quantitative research below.

2. Longitudinal Research

We suffer at the moment from a lack of information about how individual behaviour is changing over time. There are, however, some data sources that could be tapped and anonymised to investigate this behaviour especially that which is held by the private sector, such as insurance, technology, logistics companies or the retail sector.

3. Modelling these factors

To the extent that either of the above searches and/or interrogations reveal trends in behaviour, it is necessary to map that against the trends discovered in "UK on the Move" and test their validity. We can then identify better and advise which factors need to be given greater weight when forecasting future behaviour.

Social Research Associates Ltd 2013 for the Independent Transport Commission

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Independent Transport Commission

Registered Charity 1080134

Published by the Independent Transport Commission, February 2013

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