



On the Move:

Exploring attitudes to
road and rail travel in Britain

Social Research Associates
July 2015



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The 'On the Move' research project

This research project has its origin in the desire to understand changing patterns of road and rail travel behaviour in Britain. This resulted in the first 'On the Move' report in 2012, authored by Professor Peter Jones and Dr Scott Le Vine, which used the National Travel Survey to illustrate the dramatically shifting travel trends in Britain over the period 1995-2008.

The current report has been commissioned as part of the second phase in this research, through which the ITC and ORR are exploring the factors that are driving these changing travel trends. This report provides an overview of the attitudinal research work, and it will be supplemented by a series of technical Appendices covering the data and statistical results. These Appendices will be made available in electronic form online on the sponsors' websites.

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Foreword and Overview

This research study, exploring the reasons behind the changing patterns of behaviour in road and rail travel, has been sponsored by the Independent Transport Commission (ITC) and the Office of Rail and Road (ORR), and supported by a generous grant from the Rees Jeffreys Road Fund. Our interest in this fundamental topic originated in the first 'On the Move' study published in 2012 and authored by Dr Scott Le Vine and Professor Peter Jones (also co-sponsored by the RAC Foundation), which used the National Travel Survey to illustrate the dramatically changing travel trends in Britain over the period 1995-2008. This research demonstrated that road and rail travel trends were not behaving as the forecasting models had predicted, with car travel much lower than estimated while rail growth had significantly exceeded expectations.

The ITC and ORR have therefore been keen to explore the drivers of these changing travel trends, in order to help the Department for Transport develop improved forecasting methods and to help policy makers better understand the future trajectory of these trends. The study before you is part of this collaborative venture. These issues are of crucial importance given the massive investment that has been promised in transport infrastructure over the next few years, including £15bn on the Government's Road Investment Strategy by 2021, and £38bn on rail investment and upgrades over the period 2014-19. We offer this introduction to set these research findings in the wider context of policy making and to highlight the key findings.

The framework for this study has been shaped by the need to explore changing attitudes among key groups in the population which might be expected to be influencing overall travel trends. Social Research Associates were commissioned to identify these key groups and conduct a wide-ranging attitudinal survey of their travel behaviour and choices.

Preliminary analysis suggested that attention should be focused on the following key groups:

- **Younger people.** The initial 'On the Move' study showed that changing behaviour among under-30s had made a particularly significant contribution to the overall trends, with young men less likely to use the car, and a slowing rate of growth in car use among young women coupled with a dramatic increase in their rail travel.
- **Older people.** The over-55s have been the fastest growing age cohort amongst UK citizens and the initial report indicated that in this group car use was continuing to rise significantly.
- **Migrants and Minority Ethnic Groups.** Inward net migration has contributed significantly to UK population growth in recent years, not only through EU migration but also through arrivals from India, Pakistan, Nigeria and China; while at the same time a number of minority ethnic groups have higher birth rates than the wider population and so these communities are expected to grow faster.
- **Business Travellers.** The initial 'On the Move' study indicated that it was business travellers that had displayed the most noticeable shift from car travel to rail use, driven by changes in tax policies towards company cars.

To explore the significance of travel attitudes in these groups, the researchers focused particularly on issues that might be causing changes in travel choice. The questions included an exploration of the reasons for modal choice, the influence of technology, travel purpose, 'tipping points' affecting travel behaviour and whether current attitudes and behaviours were likely to be temporary or permanent. The findings reveal that the story of travel behaviour is complex and variable across the different groups. Some important themes have emerged.

On the issue of modal choice the findings are striking in demonstrating that economic factors still remain a strong determinant of travel choice, with younger people especially concerned about the high cost of using a car relative to their income, including issues such as insurance, parking and learning to drive. The impact of concessionary and advance fares on public transport use is also an important driver, especially for younger people and pensioners. At the same time, location appears to be a key determinant for modal choice, due to the poor provision of public transport in rural areas. This is particularly the case with older people in rural areas who feel that they need to retain a car in order to preserve their independence.

Modal choice also varies significantly across the different groups. The research demonstrates that young people are 'falling out of love' with the car, and place greater weight on alternative consumer products, while older people see the car as an important part of their lifestyle. At the same time, improvements in the accessibility of the public transport system are encouraging car owners to make more varied modal choices. Amongst minority ethnic groups and migrants, we see that most are much less car reliant, though there are some marked variations between groups. There also appears some evidence of a gender dimension in modal choice, with cycling more popular for men, while safety fears are a more prominent driver of choice for women who will sometimes prefer car travel over walking or cycling. Across almost all groups the research indicates that journeys are increasingly being split across different modes, and this suggests that the need for a fully integrated transport system is stronger than ever.

The research reveals some interesting factors affecting how much these groups are travelling. This includes the impact of online commerce, with younger people much more open to new ways of shopping, such as click and collect from stations, which is enabling more shopping to take place without the need for a car. Perhaps surprisingly, environmental concerns do not appear to be a great driver of travel behaviour within these groups; nor does health seem to be a strong motivating factor for younger people. At the same time, increasing use of concessionary fares by older people appears to be increasing the amount of leisure travel that they undertake.

A further key finding of the research is the impact of technology on travel attitudes and behaviour. The surveys showed that we are seeing changing attitudes towards the value of travel time, especially by business travellers using the train. Communications technology is also affecting modal choice, especially for younger people, who are attuned to using smartphones and tablets on the go, and this is also facilitating car sharing and leasing. Some evidence emerges that technology is helping to increase perceptions of safety on public transport. Far from contributing towards a decline in travel, the attitudes expressed in this research show the opposite, with social media facilitating new encounters, and business travellers believing that technology is actually increasing their need to travel.



At the core of this research has been the desire to understand whether these attitudes are temporary or permanent features affecting travel behaviour. By comparing different age groups, it has been possible to see that there remain 'tipping points' in peoples' lives at which point modal choice shifts. Such tipping points include starting a family, now more common in one's 30s, at which point car ownership becomes more desirable; and also retirement, which often results in downsizing from a two to one car household. In spite of these factors, it is evident that across all groups we are seeing a rise in utilitarian attitudes towards car travel, which indicates that car ownership is likely to increasingly shift towards new forms of car access, such as car hire and car clubs. An equally significant factor pointing towards more permanent changes in attitudes is the way in which use of public transport modes when young increases the likelihood of continuing to use these later in life. It is striking that these changing attitudes towards modal choice appear not to be leading to a lesser desire to travel overall, and indeed almost all groups explored, except the elderly, expected their travel to increase over the next five years.

What might these findings mean from a policy perspective? The implications seem to us to be various. First, the research implies that changing attitudes to travel among young people, including a lower priority placed on car ownership and greater use of public transport and cycling/walking, is likely to have a lasting effect, independently of economic factors (although the latter remain important). The need for investment in increasing capacity on public transport is therefore likely to remain strong. Second, the increasing preference across groups for multi-modal journeys suggests that efforts need to continue to improve modal integration and increase awareness of travel choices.

The changing attitudes to car ownership also suggest that, although demand for road travel will continue to remain high, we must be prepared for new forms of car usage, including car hire and sharing, to flourish. This will increase the marginal cost of each car journey, with likely increases in demand for other forms of land-based travel. Finally, it is clear from this research that location and access to transport are key drivers of travel attitudes and choice. This indicates that transport must be fully integrated into land use and planning decisions, since much will depend on where new housing is built and its associated transport provision.

The analysis in this report has been based on a large and broadly based sample of respondents using quotas rather than a random selection. It provides an insight into the travel attitudes expressed by members of the chosen groups, and the factors that are changing those attitudes. That said, the qualitative dimensions of this research do have limitations and it will need to be supplemented with further work to measure more precisely how these factors relate to one another. Such work will include analysis using new data sources to determine the relative scale of these drivers and how they might be measured. The sponsors suggest that further investment by the DfT and research bodies would be helpful in finding ways to measure these important factors and then use this information to develop more sophisticated forecasting and models.

We will now be considering how to support further work in this area, and are particularly conscious of the need to determine how trends have changed during and after the great recession, as well as the need to probe further rail travel behaviour. We would like to thank the authors for this illuminating report and commend it to policy makers as we strive to understand how our travel patterns are changing.

Independent Transport Commission
Office of Rail and Road





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Executive Summary

'Peak car' or temporary blip?

1. There is an ongoing debate in the UK about whether we have reached 'Peak Car' - namely that car use per driver has reached its peak and will continue to fall especially in large cities which now contain the majority and a growing proportion of the population. In contrast, some see the recent decline in road mileage per driver as a temporary effect of the recession. Clearly there are important implications for future investment in transport.
2. To inform this debate, the Independent Transport Commission (ITC) together with co-sponsors the Office of Rail and Road (ORR), the RAC Foundation and Transport Scotland commissioned a series of linked research studies under the general title 'On the Move'. The first study which is already published and now being updated examines the data available from recent National Travel Surveys¹. The second strand of research, reported here, has been co-sponsored with the ORR and supported with a grant from the Rees Jeffreys Road Fund. It examines changing attitudes to car ownership, driving and public transport use on the part of different demographic groups - namely 17 - 40 year olds, over 55 year olds, business travellers, migrants and different ethnic groups. The third (in preparation) will examine non-transport data to throw light on general trends in lifestyles as they impact on travel. The overall aim is to use the cumulative insights to inform the Department for Transport's national model and its associated policy implications.

The research method

3. Groups of people ranging from small family and neighbours to formal focus groups were held around England. In addition a Facebook and electronic panel surveys were organised. In total around 4,700 people took part comprising a cross section by age, sex, region, car ownership and licence holding. The analysis was based on cross tabulation to highlight differences since much of the sampling was based on quotas rather than random selection. The research was designed to produce a combination of quantitative and qualitative data and discussions about attitudes towards car use and travel in general (i.e. "the why of the what"). In particular the research design was able to understand how transport changes are associated with life stages - which traditional 'snap shot' surveys cannot address.





Summary of participants

Young people <30	People aged 30-42	Older people 55+	Commuter and Business Travellers	Migrants	Black Asian Ethnic Minority Groups
1940	1054	824	732	625	751

Key findings

Young people

4. The vast majority of young people cite cost factors as the main reason why they are driving less. But this is not the whole story since even those who did own cars often prefer to travel by public transport, walking or cycling (41% of all short trips and 27% of long trips). There is also a growing number of young people who say they don't ever want a car and this increases with age. Thus 15% of non-car owners aged 17-29 don't want a car in the future compared to twice as many (32%) of non-car owners aged 30-42.

Summary of the 'push pull' factors identified

All young people

- An increasing number of young people are going to university and accumulating debts.
- Real wages and employment rates for young people have declined especially during the recession.
- Concessionary travel, advance rail fares, car sharing, car clubs are cheaper for travel than running a car.
- Parking at university and college campuses and at work places in urban areas is limited.
- The quality of public transport is improving.
- Car ownership and especially high end cars don't lead to higher status in the eyes of other young people.

Why particularly young men?

- Young men form partnerships and become fathers at later ages compared to women – the larger the number travelling in the group, the cheaper it is to travel by car.
- Cars are becoming less attractive than alternative consumer products especially technological or music related.
- Young men like the 'freedom' associated with cycling and are more receptive to cycling for health motives than young women.
- Young men are less concerned about personal safety than women.

5. The research was also concerned to explore whether young people would 'catch up' with rates of car ownership once they reached their 30s and there was much uncertainty about the answer to this. One of the causes of uncertainty is the ability of today's 20-29 year olds to continue with their lifestyles when they form partnerships and have children. A key difficulty is the lack of suitable housing and other facilities such as schools for families in central urban areas where most young people have lived as singles in their 20s and in an ideal world where they would like to continue living. Another difficulty is the cost of housing in city centres. This combination of reasons often drives young families out to the suburbs even though they would prefer to maintain their urban lifestyle with good access to public transport and walking destinations. Once in the suburbs, car ownership becomes a greater convenience and for some essential.
6. However, it is also apparent that this generation of 20 year olds and indeed also many in their 30s are unlikely to resort to the levels of car ownership or use of previous generations. Their attitudes are very different in two crucial aspects. First they have learnt about how to use the public transport system which at least in urban and along intercity routes is improving and resulting in generally positive experiences. The second reason for car use continuing to decline is the reallocation of road space away from cars including bus lanes, good walking environments, wide pavements and cycle lanes which make the car journey longer and incline people to stick to alternatives.
7. Another factor is the growing tendency to separate the idea of car ownership from use and in turn consider alternative forms of car use such as car clubs, car hire or lift sharing and the growing number of hybrid combinations in between such as web based shared taxis or 'hitchhiking' such as BlaBla Car. These trends also point to a decline in second car ownership and an associated increase in the use of public transport, cycling and especially walking which distinguishes one car from two car household patterns of travel.

Older people

8. The most significant differences in travel patterns of the over 55 year olds related to residential location with both car ownership and licence holding increasing from urban through suburban to rural. Thus in rural areas 78% had a full driving licence but in urban areas only 54% and more of the latter never drove.
9. However, this is only part of the story. The research also shows that older people are using a wider range of modes and are less likely to rely on cars even when they own one. This change is in part due to the availability of concessionary fares or free travel and there is resentment that these cannot be used in some rural areas. For the growing number of older people still working, free bus passes and senior rail discounts are especially attractive. A second influence is the desire to travel especially for leisure and family visiting and many older people are choosing to move to places which provide good public transport links to safeguard their mobility should they or their partner be unable to drive. This might put further pressure on urban property but it is counter balanced by the desire to downsize and release equity which is best achieved by moving away from city centres. The latter could be a positive strategy for the economy of some of the UK's seaside towns and the full report includes a case study of Saltburn where this seems to be happening.

- 10.** The overall finding from the research is that older people are receptive to change driven by the desire to retain their mobility. Many are planning ahead for this purpose and are in the market for all sorts of solutions involving moving to more accessible locations, new types of vehicle design and all types of offers on travel options.
- 11.** One key issue not fully addressed by the research is the problems experienced by disabled people who are disproportionately elderly which lead to their being excluded from transport opportunities. Although we heard many examples of improvements in recent years, there are still impediments not all related to the built environment or vehicle availability but also due to discrimination or poor customer care.



Commuters and business travellers

- 12.** This research group included both commuters and people who travel during the course of work, the latter ranging from professionals to manual workers.
- 13.** People are travelling more for both commuting and business. Commuting distances are growing driven by the need to access cheaper housing and other factors such as dual career families and school allocations. It might be assumed that this would lead to higher rates of home working and certainly it seems that attitudes of both employers and especially employees are changing. For many professional occupations the workplace is flexible although still involving the concept of a 'base' location. People are working at different times at home, in coffee bars, local hubs, in their cars, on public transport and whilst walking. These trends are increasingly enabled by technology and to some extent by the transport industry. Train commuters in particular said they were travelling less in recent years (26%) due to changing hours and working from home.
- 14.** However, it seems there is a long way to go to fully support this trend including in relation to fares structures, vehicle design, planning and housing policy. In addition it is felt that some employers are reluctant to allow flexible hours or home working for a variety of reasons including concerns about tax, health and planning ambiguities. These ambiguities are also of concern to the growing number of self-employed many of whom start their businesses from a home base.

- 15.** The mode of transport used for commuting varies by location and parking availability. Inevitably jobs in city centres were increasingly difficult for car travel due to both longer travel times and reduction in parking opportunities. Fixed public transport routes were preferred for commuting although there was a lot of detailed knowledge of options with some combining modes such as train/cycle or train/walk to outside central zones in order to reduce costs. In contrast, suburban work locations were often described as difficult to get to by public transport and in spite of some examples of work based car sharing schemes, most people working in these areas drove by themselves and indeed some companies had moved from city centres exactly to facilitate this.



- 16.** Apart from commuting, there is also undoubtedly some travel substitution for business travel by methods such as video conferencing (e.g. with Skype) but this does not seem to result in less travel overall – rather it leads to wider networking and there is still a strong desire for face to face meetings. The ability to work whilst travelling for business is a key explanation for modal choice with facilities on trains and planes much discussed. An interesting finding was a growing tendency to use cars as mobile offices on grounds of convenience and privacy and some ingenious adaptations such as fold down desks and other equipment were described.

Migrants

- 17.** Both the country of origin and the planned length of stay in the UK affect car ownership rates. Our sample based on people who had moved within the last ten years, was 40% from EU countries, a third from commonwealth countries and the rest from other places. They were disproportionately from lower paid occupational groups compared to non-migrants and also more likely to live in urban areas – often in cultural and country of origin clusters. These factors led to distinct travel patterns which were further influenced by the need to prioritise housing costs and the desire to travel to their country of origin for visits – usually by air. The result is relatively low rates of car ownership and much higher rates of walking with 80% reporting that they were unlikely to acquire a car in the immediate future compared with 50% of non-migrants.
- 18.** Nevertheless, some migrants needed a car (or often a van) for work and there was a tendency to car share especially by East European migrants where the norm in their home countries was to insure the vehicle rather than the individual driver.

- 19.** Length of residence was another key factor in influencing travel and the longer migrants had been in the UK, the nearer they moved to indigenous rates of car ownership. However, the habit of walking and proximity to destinations is likely to continue so overall car ownership is unlikely to increase as fast as the population growth of this group would otherwise indicate.

Black, Asian and ethnic minority groups

- 20.** There are clear differences in attitudes and patterns of travel between ethnic groups with some having more in common with the white UK group than other BAME groups a factor related to both socio economic status and to a lesser extent specific cultures. The report highlights the Indian Sikh and Hindu communities as an example of high commitment to car ownership with 60% of this group judging a new car to be a priority compared to only 29% of Africans.
- 21.** However, as with the migrant groups, BAME groups are more likely to live in urban areas and in clusters based on ethnicity; so many of the differences in travel relate to the greater opportunities for using public transport or walking in urban areas. Nevertheless, moving out is taking place due to the push factor of rising housing costs in central urban areas especially London and there was agreement that this will increase car use.
- 22.** Nevertheless BAME groups in general have stronger aspirations to car ownership and are less inclined to use other modes especially cycling. Even train is considered less often since once a car is acquired this tends to be the default method both for reasons of status and the economics of travelling with larger family groups.



- 23.** In addition, aspirations lead to plans to move away from the inner city but still to return for shopping, religious venues and to a lesser extent work. This results in a network of cross city or cross country routes – the latter often provided by specialist coach services.

Conclusion

- 24.** The research has shown major differences in travel between the groups studied although with urban/suburban/rural and socio economic differences frequently proving the most influential variable. As the proportion living in urban areas increases, both car ownership and car use is bound to decline.
- 25.** Some groups are exhibiting bigger changes in attitude to car ownership than others especially young people but all groups are acquiring knowledge of public transport systems and are increasingly unlikely to see the car as the automatic default choice. This in turn is breaking the link between car use and car ownership and reducing the status of cars as statement consumer goods.
- 26.** Technology is enabling more diverse work travel patterns and affecting both commuting and business travel. A reduction in either commuting or business travel through working at home does not automatically lead to a reduction in total travel since many people still make trips for other purposes during the time gained.
- 27.** These and other key findings from the research show both the success of past policy interventions to encourage less car travel and the enormous potential for future opportunities to move towards more strategic approaches to transport provision.

I. Introduction and Methodology

I.1 The objectives

1.1.1 Our recent co-sponsored 'On the Move' report² showed significant changes in British car and rail travel trends since the 1990s.

1.1.2 Summary of key findings

- Younger male drivers have reduced their car use.
- Women and older people are driving more than in previous generations.
- Male car driving mileage is particularly affected by declining company car ownership leading to a switch to rail for business travel.
- The number of rail journeys (but not their length) is increasing due to an expanded market base and there is some correlation with reduced driving for business purposes.
- London has patterns of travel distinct from the rest of GB: 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, including driving less, compared to those born here.

1.1.3 Following presentations and discussions of these findings it was clear that there was a need to understand more about the reasons and in particular to gauge the extent to which these changes were a temporary effect of the recession or more permanent.

1.1.4 The research, although focused on UK, is of wider interest since the same decline in personal car mileage has been witnessed in many other industrial countries.

I.2 Summary of research and methodology

1.2.1 The research summary: chronology, numbers and locations

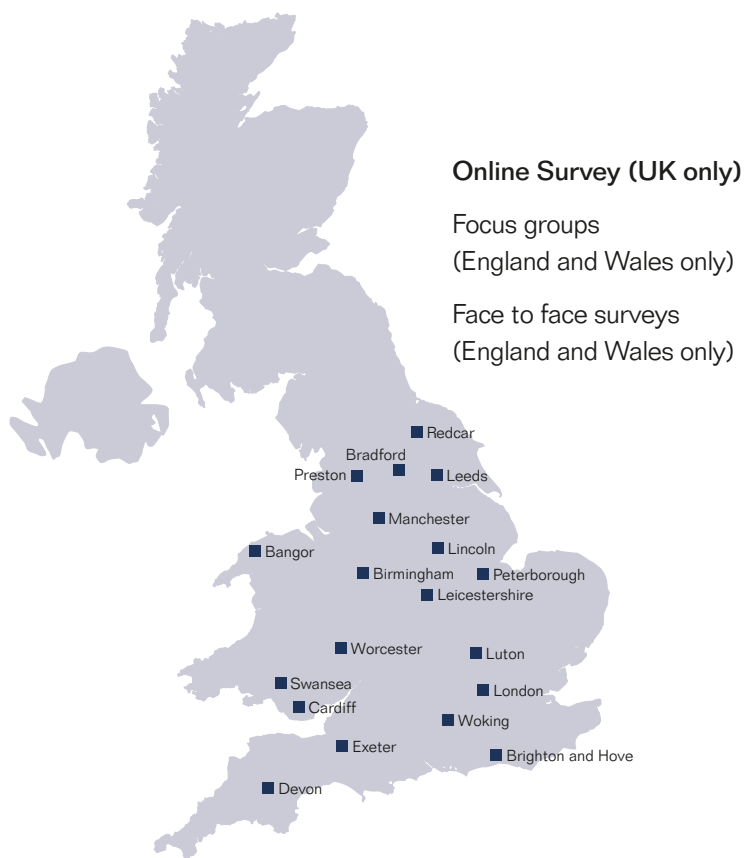
Table 1 Research summary

Stage 1	Jan-Feb 2013	Pilot Study Groups	100 participants
Stage 2	April-May 2014	15 Neighbourhood discussions and 14 ³ Focus Groups with young people	215 participants
	April 2014	Facebook survey	336 respondents
	May 2014	Electronic Survey targeting young people	1,700 respondents
Stage 3	October 2014 - January 2015	13 Focus groups	108 participants
	January – March 2015	Face to Face interviews	1,277 respondents
	April 2015	Electronic Survey	953 respondents
Total			4,690

² See <http://www.bbc.co.uk/news/business-20526328> and also the full report at <http://www.racfoundation.org/research/mobility/on-the-move-main-research-page>

³ Section 3 Results - Young People

Figure 1 Map detailing discussion groups and survey locations



1.2.2 Stage 3 group quotas

Young people <30	People aged 30-42	Older people 55+	Commuter and Business Travellers	Migrants <10 yrs in UK	Black Asian Ethnic Minority Groups
532	870	824	732	625	751

In addition people took part in neighbourhood discussion or focus groups - 356

1.2.3 Full demographic, statistical results, discussion group and quantitative summaries are shown in Appendices A-D and in an accompanying CD.

1.3 The use of qualitative research

- 1.3.1** Qualitative research is designed to enable an understanding of motivations which underlie patterns of behaviour. Qualitative research acknowledges that people are not entirely rational beings and that although economics is a powerful influencer it is not the only explanatory factor and that it is therefore important to carry out research to understand 'the why of the what'. A key concept driving this approach is the role of perception which often varies from the 'reality' of quantitative facts but which can be a powerful explanation of beliefs, attitudes or behaviour. Changes to behaviour do not always follow attitudes or beliefs however. This may be due to legislation rendering some actions illegal, economic factors such as not having enough money or simply lack of supply.
- 1.3.2** Typical methods for qualitative research include individual interviews, focus groups or surveys with open ended questions and all three were used to inform this research.

1.4 Group interviews and interpreting attitudinal research results

- 1.4.1** 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 which can be illustrated with the image of a palette. In this light the device of asking people to rank reasons for behavioural change is strictly limited albeit sometimes useful in triggering discussion and giving some indication of the decision making process. In contrast, the discussions which took place during this research throw interesting light on some of these 'tipping' factors' which are otherwise lost in more limited rating exercises⁴.



⁴ 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 travel choices. This concept was also built into a redesign of the Transport Direct portal which offered the capacity to customise journeys. SRA (2005) Transport Direct Market Research – 3 vols (DFT)

1.4.2

The discussion topics included:

- The history of travel patterns
- Reasons for driving or not driving
- Prioritising these reasons – self and others
- Attitudes to public transport – rail, bus, cycling, walking
- Effects of driving or not driving
- Views about travel in the future
- Travel and demographic profiles

1.5 Face to face interview surveys

1.5.1

These interviews were carried out at a range of geographical locations and venues around the UK including in public places targeting business, migrant, black, Asian and minority ethnic groups (BAME), older and younger people, since these were the groups highlighted in the quantitative phase as having travel changes which needed further explanation.

1.5.2

The 42 discussion groups and 1,271 face to face interviews were held in locations around the UK as shown in Figure 1.



1.6 Online surveys

1.6.1

This research method was designed to use electronic and social media to achieve larger samples to check and compare against the results of the focus groups. The samples were drawn from around the UK in proportion to the population density of the target groups. Appendix A shows the electronic questionnaire schedules.





1.7 Facebook survey

- 1.7.1** Online survey promotion via social media for trending is a cost- effective targeted solution and it is being increasingly used by the market research industry since it produces a large body of replies from targeted groups – in this case young people, non-drivers from middle and higher income groups and high users of rail – all of whom are also more likely to use social media. We therefore linked to the “About Me” section of Facebook and filtered our requests by factors such as education, age or employment thus creating the same subgroups as set up for the focus groups to compare driving and lifestyles. An advantage of this approach is that it kept project costs down to a minimum because the money spent goes straight at targeting the right audience where changing attitudes are most stark. To encourage a strong response, small prizes were offered to those who reply to the surveys which encouraged participants to share it with friends, which is one of the strengths of social media. In the event 336 responses were received by this method over two weeks.

1.8 Panel based national surveys

- 1.8.1** Two national electronic surveys were commissioned from Panelbase. The first was sent to a representative sample of 1,700 17-42 year olds and the second to 1,000 people in the four target groups to boost numbers and enable robust cross tabulation. The survey questionnaire schedules, a combination of qualitative, quantitative and open ended questions are shown at Appendix A.

1.9 Analysis

- 1.9.1** The sample of people taking part in this research is not based on stratified random selection but quotas of the target groups spread around the geographical locations shown in the literature review. In the case of the face to face interviews numbers were monitored on a rolling basis to ensure that there were sufficient numbers in all the demographic groups targeted. In addition the catchment areas for selection vary with focus groups and face to face surveys confined to England and Wales compared to the electronic survey which covers the United Kingdom. Thus confidence measures cannot be estimated nor detailed magnitudes. This means, for example, that we are unable to provide information about the proportions of the workforce who are either commuters or business travellers (the latter defined as people who travel during the course of work). Rather, based on a discussions and surveys with 732 working people comprising a spread of never/rare (i.e. commuters), occasional and frequent in-work travellers, we can report on the attitudes of each group to key work related travel issues. This also enables cross tabulation for comparison between one group and another.
- 1.9.2** For some questions such as type of location (rural, suburban, urban) 'amount of travel', or disability we have relied on self-definition. The value of this approach is also illustrated by exploring the meaning behind these concepts. For example, one of the questions asked of all participants was "have you travelled more or less in the past two years?". The phrase 'travel more' was interpreted by some as making more major trips by mechanical means whilst for others it included walking or cycling more. Another difference was whether or not the judgement included international travel. In turn, for both groups it might or might not include an element of time and or distance. Unravelling these different meanings of 'travelling more' gives a crucial insight into the nature of recent travel changes and their implications for the future which will not necessarily square with 'objective' evidence such as from the National Travel Survey showing static or declining per capita travel.
- 1.9.3** The focus of the analysis is on attitudinal factors and for that reason verbatim comments which often illustrate key points better than secondary reporting, have been incorporated into the reporting.

2. Literature Review

2.1 Objectives



- 2.1.1** As described in section 1.1 above, the Independent Transport Commission's 2013 report series 'On the Move'⁵ found significant changes in travel amongst some groups.
- 2.1.2** The reasons for the decline in driving by young people especially by males – was the subject of the first stage of the ITC Phase 2 research in 2013/2014. For this second stage of Phase 2 a literature review was commissioned. The main objective of this desktop study was as far as possible to describe shifting travel patterns of other target demographic groups, and the secondary objective was to highlight geographical areas where there are concentrations of high car use amongst these groups in order to target the qualitative and quantitative research phases.
- 2.1.3** This data review has been conducted in a short time, as a preliminary to Social Research Associates' in-depth work, and is not intended as a comprehensive evaluation of all research and data available, more as an effort to find key points to help in the design of survey work.⁶

5 Scott Le Vine and Peter Jones "On the Move: Making sense of car and train travel trends in Britain" published by RAC Foundation, Office of Rail Regulation, Independent Transport Commission, Transport Scotland and the RAC Foundation (December 2012)

6 In designing this research we are grateful for the insights gained from many who have written about the concept of 'peak car' and for their generous insights and support for this project. In particular, David Metz "Peak Car: the Future of Travel" (2014, Landor links), fellow Commissioners of the ITC especially Prof Peter Jones and Peter Headicar, colleagues from the Academy of Urbanism, Future Agenda, the Transport Statistics Users Group and numerous others including Prof Glen Lyons, Karen Lucas "Automotives: Understanding Car Use Behaviour" (2011, Emerald), John Sutton "Gridlock" (2015, Routledge) and transport journalists including Richard Westcott (BBC), Mark Hillsdon (Guardian) and the Office of National Statistics.

2.1.4 There appears to be very little substantial research on changing travel patterns in the UK, particularly those associated with black and minority ethnic and migrant groups. The main sources for this desk-top research are therefore, the National Travel Survey (NTS) and the UK Census data (2001 and 2011). The NTS is the primary source of data on personal travel patterns in Great Britain. It is an established household survey which has been running continuously since 1988. It is designed to monitor long-term trends in personal travel and to inform the development of policy. The survey collects information on how, why, when and where people travel as well as factors affecting travel (e.g. car availability and driving licence holding). Since 2002, the Department for Transport (DfT) has commissioned the National Centre for Social Research to conduct the survey fieldwork. Data collection consists of a face-to-face interview and a 1 week self-completed written travel diary. In 2013, the survey coverage changed from sampling residents of all Great Britain to residents of England only.

2.1.5 The review concentrated on demographic groups who have been identified through previous research as being under-represented in national car and rail forecasting models. These groups are:

1. Older people
2. Migrants
3. Black, Asian and Minority ethnic groups
4. Business travellers

2.1.6 A full version of the literature review is shown at Appendix B and a summary of the data results are listed below in sections 2.2 through to 2.5 .

2.2 Older people



An increasing proportion are economically active (65-74 year olds have nearly doubled from 8.7% in 2011 to 16% in 2011)

2.2.1 There are more older drivers with those aged 70+ increasing from 65% (M) and 22% (F) in 1998 to 79% (M) and 42% (F) in 2012.

Table 2 Full car driving licence holders (% in Great Britain)

	1998-2000 (%)			2010 (%)			2012 (%)		
	50-59	60-69	70+	50-59	60-69	70+	50-59	60-69	70+
All adults	77	67	39	83	79	57	82	79	58
Males	88	83	65	90	89	78	89	89	79
Females	67	53	22	77	69	41	75	70	42

2.2.2 Take up rates of concessionary fares for older people has also increased (from 30% in 1998-200 to 66% in 2012) and rates of bus use have risen correspondingly. In 1998/2000 32% of over 60 year olds said they used a bus at least once a week and this had increased to 40% in 2010.

2.2.3 Car ownership is lowest amongst over 65s but the rates have been increasing for 60-74 year olds but interestingly declined for 85+ year olds.

Table 3 Percentage comparison of car ownership between 2001 and 2011

	60-64		65-74		75-84		85+	
	2001	2011	2001	2011	2001	2011	2001	2011
0 cars/van	18	14	23	19	48	35	45	70
1 car/van	50	42	52	52	42	51	46	24
2 cars/vans	32	44	25	29	10	14	9	6
Total	100	100	100	100	100	100	100	100

2.2.4 Household car ownership rates for older people also vary by sex. In the 50-54 age group, men and women are almost equally likely to have a car in the household but by the age of 80 to 84, car availability amongst women is 25% lower than amongst men, except in London where all rates of car ownership are low. In the oldest age group, the difference is slightly less stark, partly because car ownership amongst men aged over 85 is also quite low.

2.3 Black, Asian and minority ethnic groups



2.3.1 Between 2001 and 2011, the proportion of the population in the UK identifying as White British and White Irish decreased to 87% (55 million). The remaining 13% (8.1 million) belonged to a minority ethnic group. It is also the case that estimates show that the proportion of BAME groups will double by 2051 to 25% due to the higher birth rate amongst people of Pakistani, Bangladeshi and African origin.⁷

2.3.2 The location of BAME groups varies, with concentration in urban areas. After London (40% belonging to a minority group in 2011), the West Midlands was the most diverse area and Wales was the least.

2.3.3 However, these broad profiles mask significant differences between BAME groups. For example, Asian Indian households have higher rates of household car ownership compared to both the white UK population and other ethnic groups whilst Afro-Caribbeans have far lower rates than all groups.

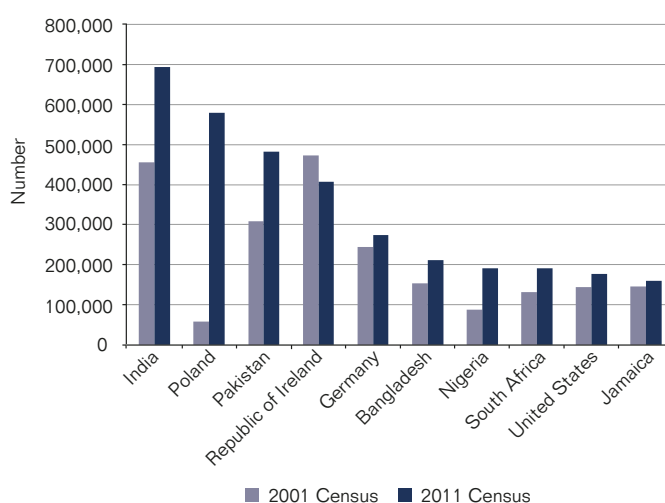
2.4 Migrant groups

2.4.1 'On the Move' (2012) highlighted that people born overseas tend to drive less than people born in the UK.

2.4.2 Chart 1 shows a comparison of the most reported countries of birth of non-UK born usual residents from the 2001 and 2011 census. This shows a marked decline in residents from the Republic of Ireland and a large increase of those from Poland, India, Pakistan, Bangladesh and Nigeria.



Chart 1 Most reported countries of birth of non-UK born usual residents⁸



2.4.3 The data on migration showed the local areas with the highest proportions of people not born within the UK and this was used to tailor the research samples to highlight differences in travel patterns between long established migrants and more recent arrivals.

2.4.4 Although many recent migrants are students, the recruitment quotas were weighted towards employed migrants since they are more likely to stay longer and thus affect travel demand in the longer term.

2.5 Business travellers



- 2.5.1** The analysis of business and commuting travel was based on data up until 2012 which would be said to predate the economic recovery.
- 2.5.2** In 2012, the average number of business trips (per person (defined as the course of work) in Great Britain was 31, travelling 606 miles. Both the number of business trips made and the distance travelled on business trips were lower in 2012 than the comparative figures for 2002 when the average number of trips per person was 34 and the miles travelled per year was 683. The drops in these figures occurred after 2007; around the time that the financial crisis occurred (NTS 2013).
- 2.5.3** On average, in 2012 a person made 146 commuting trips (defined as a trip from home to work), travelling 1,318 miles. In 2013, for England only, these figures were 145 and 1,279. These figures are 18% and 11% lower respectively, than the same figures for 1995/97. The decrease in commuting trips has been a large contributor in the 16% fall in all trips recorded between 1995/97 and 2013. Part of this decrease is likely to be related to the increase in the proportion of people who work at home and changes in employment status.
- 2.5.4** Commuting by public transport increased between 2001 and 2011, although commuting by bus or coach saw a slight decrease as shown in table 4.

Table 4 Public transport commuters, 2001 to 2011 (England and Wales)

	Percentages		Percentage Point Change
	2001	2011	
Public Transport	14.5	15.9	1.4
Light Rail	3.0	3.8	0.8
Train	4.1	5.0	0.9
Bus or Coach	7.4	7.2	-0.2

Source: 2001 and 2011 Census - Office for National Statistics

2.6 Conclusion

- 2.6.1** The literature review and data analysis at Appendix B contain a wealth of analysis by age, ethnicity, migration and work travel. Much more could have been included but the research provided a good guide to geographical areas in which to capture good proportions of the target groups.

3. RESULTS: Young People

3.1 Introduction and methodology



3.1.1 The group interviews with young people were carried out in two tranches which enabled the results from the first to be built into the second.

First tranche

3.1.2 Fifteen family or group interviews were carried out in January-February 2013 weighted towards 16-30 year olds and in total involving 100 people. Each interview session included setting out a key finding from the quantitative research 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). The results of this study were presented to a joint ITC/RAC workshop held in February 2013. There was considerable interest in exploring the findings further which was subsequently commissioned to focus on attitudes of young drivers.

Second tranche

3.1.3 This stage of the research was planned to explore these issues in greater depth by interviewing and surveying people in focus groups. A critical objective was to investigate whether the changes in recent travel patterns of young people will continue throughout future life stages. The focus was on those groups where travel changes appear to be most dramatic as identified in the original 'On the Move' (2012) report, particularly younger people, men, and urban residents.

3.1.4 12 focus groups were arranged in four areas, (namely London, Manchester, Leicester, Exeter/Bristol) and their rural and suburban hinterlands. Within each group there were a mixture of drivers and non-drivers. The original plan was to also recruit a mix of low and high mileage groups but there were so few 20 year olds in the latter groups that this criteria was changed to whether people were drivers or non-drivers. Eight of the groups were divided by age (under 30, and 30-42) and four of the groups were of mixed ages (17-42). In total 97 people took part.



3.1.5

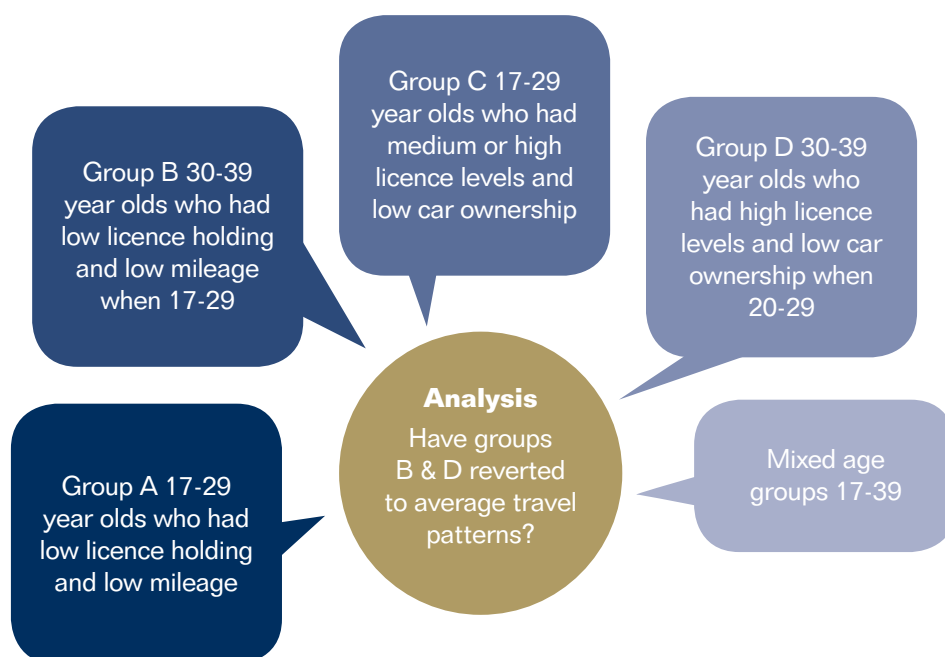
In addition an electronic survey was carried out involving 1,700 respondents and the total research resulted in demographic profiles of 2,351 young people as shown in Table 5.

Table 5 Profile of all participants

	Driving licence (full)	Driving licence provisional	Household car ownership	Age 17-29	Age 30-40	Totals
South West	69%	21%	86%	74%	26%	132
North	59%	23%	68%	71%	29%	804
East	60%	22%	79%	73%	27%	117
Midlands	59%	20%	70%	69%	31%	436
London & SE	64%	21%	72%	66%	34%	744

3.1.6

This methodology was designed to explore attitudinal and behavioural differences especially by age, socio-economic status, gender, density of residence, licence holding and car ownership. In addition data was collected on access to a car, plans for car purchase and mode of travel for short and long trips. The figure below shows the basis of recruitment and analysis.



3.2 Why has driving especially by young men declined?

3.2.1 Summary of the factors identified

All young people

- An increasing number of young people are going to university and accumulating debts.
- Real wages and employment rates for young people have declined especially during the recession.
- Concessionary travel, Advance rail fares, car sharing, car clubs are cheaper for travel than running a car.
- Parking at university campuses and at work places in urban areas is limited.
- The quality of public transport is improving.

Young men

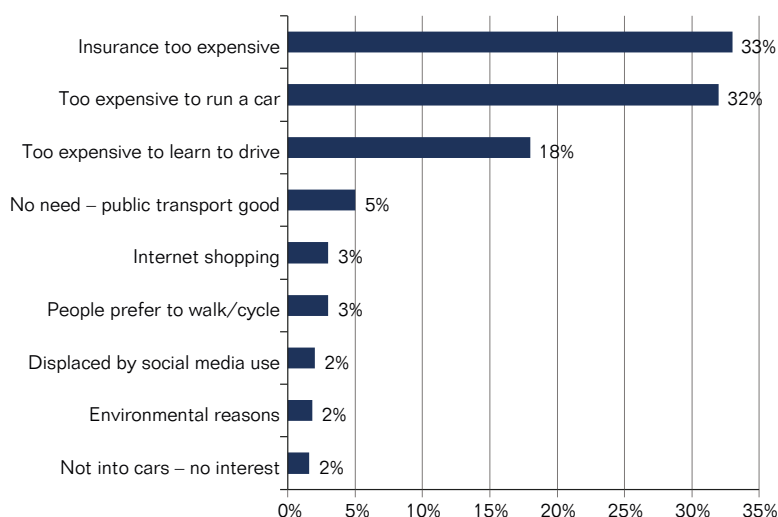
- Young men form partnerships and become fathers at later ages compared to women.
- Cars are becoming less attractive than alternative consumer goods.
- Young men like to cycle and are concerned about health.
- Young men are less concerned about personal safety than women.

3.3 Car insurance costs are perceived to be higher for men than women

Cost factors

3.3.1 There is no doubt that the cost of running a car is a major factor in deterring young people from car ownership. Chart 2 shows the results of individual ranking of reasons why driving by under 30 year olds had declined.

Chart 2 First ranking preference (ALL n = 2,231)





3.3.2

The rankings show that cost factors are chosen as the main reasons for a decline of driving by young men with the costs of running a car (both insurance and general running expenses) mentioned by two thirds. Insurance was felt to be especially expensive for young men compared to young women. These findings are not surprising and many details were given. This age group is more likely to earn below average or to be unemployed. In addition an ever greater proportion are attending fee paying full-time post-18 education courses and living away from home with associated accommodation costs.

3.3.3

Current figures show that UK higher education institutions together educate some 2.5 million students annually and that the last 10 years has seen significant expansion, with a 28% increase in student enrolment.

"I was quoted £5,394 for comprehensive car insurance by Go Compare. In my dreams." (20 year old post office worker, male, Manchester)

"How can young people possibly afford to run a car? – if you manage to get an older car it's no advantage because you pay more road tax and burn more petrol." (28 year old customer service centre, male, London)

3.3.4

The cost of learning to drive was given as the most important deterrent by 18% and this is reflected in the decline of driving tests (down by 200,000 in the last four years). But underlying this result was a wealth of complex factors in particular the difficulty of passing the theory test and there being no point due to not being able to afford a car. Other factors were changing priorities for alternative spending.

"My parents offered to pay for driving lessons but I preferred to use the money to buy a guitar." (23 year old student, male, Bristol)

"The grandparents gave me £500 when I was 21 and suggested I use it for driving lessons but I spent it on travelling instead. Plenty of time to worry about driving when I'm older." (27 year old solicitor, female, Exeter)

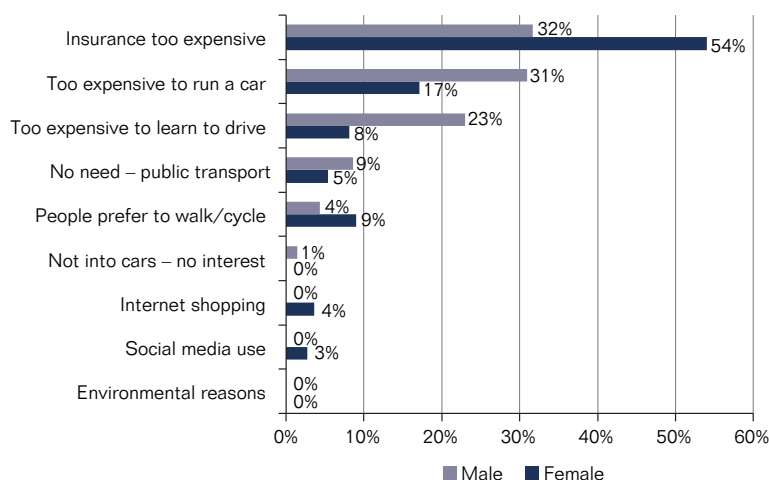
"I did have a few lessons and I know I'd sail through the driving test but not so sure about the theory test – reading isn't my thing really and you can't get driving lessons for that." (21 year old Apprentice dock worker, male, Thurrock)

Gender and cost:

3.3.5

Chart 3 shows that although both sexes rate cost factors as key reasons for not driving there are significant differences. For women, both insurance and running costs are equal deterrents followed closely by the expense of learning to drive. In contrast for men, insurance costs were the most prominent explanation cited by over a half compared to only a third of women. The reasons were relatively lower income at an early age for women plus the expectation by women that they would need more driving lessons than men. The overall impact of these gender differences is that cost factors were more significant for women's first three priorities than men's (86% compared to 78%).

Chart 3 First preference for reasons for not driving



"I'm doing all right now but ten years ago I had to count every penny and learning to drive was low on my agenda." (34 year old solicitor, Leicester, female)

"My brothers all passed their test without any lessons except from my Dad but it didn't work for me and I didn't have the money for private lessons. I think a lot of women find the same – boys are more confident with cars."

(25 year old student, London, female)

Cost and age

3.3.6 Although all age groups rated cost factors as the top three deterrents to driving, the cost of insurance was chosen by far more under 29 year olds compared to over 30 year olds (Chart 4) and it was clear that this was a major issue for young men. There were many 'horror' stories of very high premiums and very few participants were aware of options reducing standard quotations by agreeing to restricted hours of driving or numbers of passengers.

3.3.7 One strategy used by some young drivers to avoid high premiums was to insure their car in the name of their parents (known as 'fronting') but both they and their parents were uneasy about the legality of this practice and also aware that they were not accumulating a no claims bonus.

"When I was at home I got my Mum to say she was the owner and main driver but she was always worried about lying and possible consequences. When I left home to go college it seemed simpler to jack it in." (31 year old publishing editor, London, male)

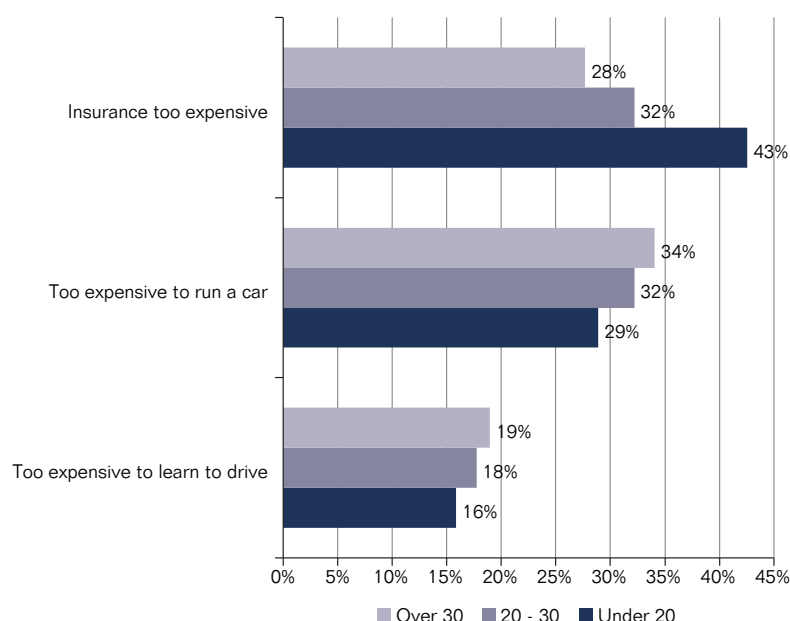
"I was quoted nearly £3,000 for insuring an old Toyota which I bought for £300." (20 year old trainee baker, Bristol, male)

"I have to admit I spend a few years driving without insurance but when I got the job with the Ministry I decided it wasn't worth the risk of getting caught." (30 year old civil servant, Newcastle, male)



"My twin sister was quoted £1,300 and mine was £2,250 so she's the main driver and I'm on as the named driver even though we're living in different places and I run the car. I'm not sure it's legal but they can't prove it." (21 year old student, Altrincham, male).

Chart 4 Top three priorities by age group



3.3.8 An explanation for less weight to the deterrent effect of the cost of insurance by 30+ year olds was that this age group were less aware of recent increases in premiums for young drivers. In contrast, there was a tendency for 30+ year olds to overestimate the cost and difficulty of learning to drive.

"The driving test is much harder these days – you have to take two parts and do reversing so people need more lessons and nothing's getting cheaper." (34 year old plumber, Manchester, male).

"Insurance is getting cheaper – these comparison sites keep costs down and there's all sorts of deals such as not driving with people in the back for young people to get lower premiums." (38 year old company secretary, Exeter, female).

3.4 Demographic and lifestyle influences

- 3.4.1** One of the key issues raised to explain patterns of travel was the later age of settling down with a partner and subsequently having children. This is also another reason for differences between men and women since in spite of later marriage (currently 36.2 and 33.6 respectively) for both sexes, the average age differential has remained constant at three years.

"I didn't buy a car until I moved in with my partner. Before that it was cheaper to go by train or I used BlaBlaCar a lot." (Fireman, 32 years old, Manchester)

"I love cycling and never thought about getting a car but she loves driving so we tend to use the car for longer trips although cycling would always be my choice." (teacher, 34 years old, London)

- 3.4.2** There were also other lifestyle differences. For example more young people (and people generally) are moving to urban areas where public transport is a good alternative. Some of the young people taking part in the research had grown up in rural areas but moved to cities initially for education but then stayed and had no desire to return to a rural way of life.

"There's a song my granny used to sing 'How they gonna keep 'em down on the farm after they've seen Paris' and it sums up what I feel about the thought of going back to Fowey." (teacher, aged 31, Bristol, male)

- 3.4.3** Gender issues were also influential. Compared to their male age counterparts, women were more likely to use cars to enable multitask trips which fits with national figures about women having less leisure time.

- 3.4.4** Women were also more concerned about personal security and saw cars with their door to door offer as safer.

"The first thing I did when I was 17 was to get driving lessons and six months later my Dad bought me a car. Before that he had to keep meeting me from the station especially late at night. I love my car and I feel happy to go all over London at any time of the day or night – for me it's liberation." (Bus driver, aged 28, London, female)

- 3.4.5** Finally there was an element of 'catching up with men'. Although younger women have nearly caught up with men in terms of driving licence acquisition, there are still differences in car ownership and income. Thus there is still a certain kudos for women in acquiring their own car as shown by some of the comments made by women with a high degree of car use.

"The days of cars needing a lot of maintenance and so on are gone and women are driving buses and even lorries. I see having my own car as an important step forward for myself as an independent woman not dependent on men. It's a long way to go though – with couples it's almost always the man driving." (engineer trainer, aged 35, London, female)



3.5 Attitudes to public transport

3.5.1 As well as the 'push' factor of increased costs of driving the research shows a 'pull' influence of positive attitudes to public transport. For example 5% gave the quality of public transport as the main explanation for less driving and this view was illustrated by a wide range of supporting evidence ranging from the availability of cheap advanced rail and coach fares and improved quality and frequency of all bus, coach and rail services.

3.5.2 For many young people, public transport is a genuine preference compared to driving for both short and longer journeys. There are a variety of reasons for this ranging from competitive or cheaper cost, convenience and the ability to use electronic technology on trains and buses. In addition there was general agreement by users of all modes including cars that public transport was better and getting better all the time.

"Public transport is a genuine alternative for me – I always look at those options first especially for intercity travel – I can get a lot of work done on a trip to Leeds which I do twice a month – I wouldn't dream of driving." (lawyer, 31 years old, London, female)

"The new metro is great – who in their right mind would drive to Manchester now?" (student, 23 years old, Altrincham, male)

"My parents don't have a clue about how to get good fares – they just think train and taxis are for special trips. My mum was amazed when I used the 'Next Bus' app to time when we left home but I can't see her changing." (student, 22 years old, London, male)

"People moan about public transport but I did a geography project looking at bus services from our village in the 1970's and it was no better then – in fact it's better now because they've opened a new station (Crosskeys, Wales)." (childcare assistant, 35 years old, Deptford, female)

"Public transport information is generally excellent and in real time too. I sent a note to First when I missed my connection and they came right back with an alternative. I use google mapping a lot too." (technician, 27 years old, Leicester, male).

"Coaches are undervalued – there's a really good network used by students – they have wifi these days and they're more direct than rail or even driving for some routes."

3.6 Rail use

3.6.1 The NTS showed that compared to bus use, rail use was increasing and there was a lot of supporting evidence to explain this finding from the research. Key factors were the ability to use electronic technology on trains, productive time to work, fast journey times, sociability and cost advantages especially due to rail card reductions. Another factor was the decline in company cars and new forms of taxation for using company cars and especially vans for private use.

"In the past no one minded if I used the company car at weekends but now we have to keep count of mileage and declare it for tax so I don't bother – I tend to travel by train now." (chain store clothes buyer, 28 years old, Bristol, female)

"I drive a van in the week and I'm not allowed to use it for my own purposes but anyway that's enough driving for me so I cycle evenings and weekends and I've no desire to own my own car." (flower shop delivery driver, 27 years old, Manchester, male)

"I'd never want to drive back to Uni – I get a lot of work done on the train or watch videos – why would I want to waste dead time driving." (post graduate student, 30 years old, Manchester, female)

"My rail card is one of my best things. I've left getting a new one till the last day of being 25. I don't just use it for journeys home but I go for the Advance fares to make day trips and visit friends. I love trains." (trainee barrister, 25 years old, London, female)

"My Mum has dementia and I try to get back to Newcastle most weekends. If I drove it would take hours compared to the train and more important it's predictable compared to struggling with traffic across the Pennines on a Friday evening."

"I always enjoy going by train. It's more relaxing and the family rail card is a real bargain. They even have kiddy packs and the staff are marvellous with the children. We used to drive a lot when they were small and it was a nightmare – we had to keep stopping and I always arrived in a state of nerves." (mother, unwaged, aged 27, Leicester)

"We built my stag party around the train system – Plymouth to Newcastle – we had a great time together in reserved seats – totally plastered when we arrived. Much better than going in individual cars – the journey was part of the event." (Farmer, aged 34, Exeter, male).

3.6.2 One of the factors in explaining such positive views of rail was the experience of travelling First Class enabled by booking off-peak Advanced Fares.

"I'm very flexible about when I travel so I usually get a First Class ticket. Last week I went to Newcastle for the football and the ticket was £38 plus I had three glasses of wine, sandwiches and goodness knows what other snacks. I reckon I made a profit. Brilliant." (student, aged 23, London, male)



"We often go up to Manchester on Virgin for the night clubs at weekends – the cost varies but it's worth it for that little bit of luxury." (shop assistant, age 22, London, female)

3.7 Cycling and walking

3.7.1 Most participants agreed that exercise was important and that combining walking or cycling with travel was sensible and often enjoyable. However, the health aspect was not an important motivator in its own right: other advantages such as journey time and the enjoyment of walking or cycling were discussed. Men in particular were keen on cycling and some participants in the groups were extremely committed and enthusiastic.

"I hate buses – being controlled and so slow but I love cycling. You get the freedom of the road in a way you can't any other way including for cars." (shop worker, 35 year old, Exeter, male)

"I had to stop cycling for a few months when I broke my leg skiing and at the end I'd put on two stone." (electrician, 19 years old, London, male)

3.7.2 In comparison many women expressed concern about safety when discussing cycling as a travel option.

"I'd never cycle – I'd be terrified – even on cycle paths if you wobble you'd be under a lorry and anyway buses cut into them – they have to get to the bus stops after all." (restaurant manager, 24 years old, Bristol, female)

"I reckon there's ten men to every one women who cycle in London. I did try it once or twice but it was really scary. It's a man thing." (receptionist, 29 years old, London, female)

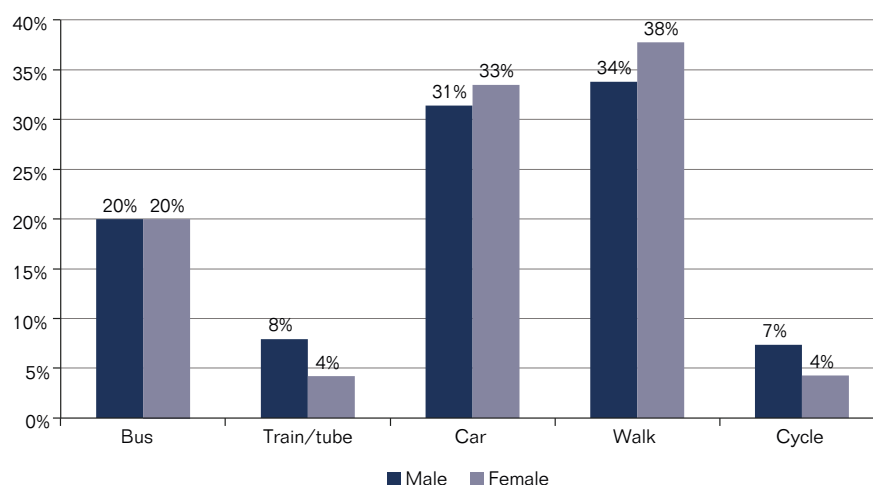
3.7.3 There is also evidence of an increased interest in cycling as a substitute especially in London and the bigger cities. Some young men in the discussion groups were very knowledgeable about cycling, different models of cycling, subscribed to cycling magazines and followed cycling sports. A key factor 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." (gardener, aged 26, Greenwich, male).

3.7.4 Walking was very popular with both men and women and indeed the most common method of transport for short trips and often cited as a better alternative to driving.

"I read that the majority of car trips are under two miles – that must be the easiest thing to publicise to encourage walking. I would never think of getting the car out just to go to the local shops. The kids prefer it too." (mother, aged 40, unwaged, Manchester)

Chart 5 Main mode of transport for short local trips by sex



3.7.5 Walking was not necessarily only a method of getting from A to B either. For some it was a social activity enabling conversation and eye contact with strangers.

“Stuck in a car you’re isolated from humanity a bit like those saddos who cruise around the bar areas in their customised cars. It’s a lot better to be in the crowd and in direct contact. Having said that I guess I’m as fussy about my appearance as some are with their cars.” (actuary, 34 years old, Leicester, female)

“Going from club to club is part of the evening out. You can’t beat cruising around Harbourside and you certainly couldn’t drive there.” (26 year old student, Bristol, male)

“I like strutting around the town – let’s face it – in a car it’s the car people look at not you – when you’re walking people notice what you’re wearing and how you look. Although I say it myself I put on quite a good show – I take a great interest in fashion.” (19 year old builder, Manchester, male)

3.8 Lack of parking

3.8.1 Another factor raised in the discussions was the difficulty in finding parking spaces. This was rather more about availability than cost. Indeed some universities have a no parking policy and this has been exacerbated as more out of town campuses have been sold off in favour of city centre consolidation and new building development.

“I have to admit I nearly chose Loughborough because they have good student parking provision but in the end I went for the best course and had to sell my car. It wasn’t just lack of parking at the University but outside my digs too.” (student, 26 years old, Leicester, female)

3.9 Leisure activities especially drinking

- 3.9.1** A key factor in reducing car use amongst under 30 year olds is a growing awareness of the dangers of drink driving. The use of a designated driver was mentioned but the usual approach was to walk or use taxis.

"Both the parents used to chance it to drive after they'd had a few but I wouldn't do that. It could seriously wreck my career choices and anyway imagine how you'd feel if you killed someone." (student, aged 23, Manchester, male)

"We had a talk about road safety during freshers week and they showed some really scary pictures of car crashes due to drink driving. It made an impression on me and I don't know any of my friends who would do and so given that a lot of students go clubbing it's one reason for the decline in driving." (student, 21 years old, Bristol, male)

- 3.9.2** 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." (delivery driver, aged 28, Leicester, male)



3.10 Technology and social media

- 3.10.1** One of the suggestions to explain the decline in car use by 20 year olds was that social media and internet shopping were substitutes for travel and that a car for some was no longer a 'must have' to keep in touch with friends.

- 3.10.2** The research showed that this was not considered to be an explanation and that it was quite the reverse. Contacts via Facebook, Twitter and other social media plus instant access to other information such as leisure activities encouraged travel to visit a wider circle of friends and activities. However this was not necessarily by car and indeed given that social activities were usually in city centres, public transport was a first choice especially if drinking alcohol was involved.

"I belong to loads of internet groups including one for making contact with other gays – chatting on line is OK but generally the motive is to meet which I do frequently including travelling to other towns or gigs at the weekend." (insurance broker, aged 29, London, male).

"The effect of the internet is to increase travel – OK I spend a lot of time on computers but that's how life is these days – maybe in the past people did less or watched TV more. Also I have access to all that technology while I'm travelling anyway – no need to sit in the office or at home anymore." (student, aged 34, Bristol, female)

3.11 Health

- 3.11.1** Another suggestion for the decline in driving by young people in their 20s was the desire for exercise. This did not appear to be a key motivator since sport was generally seen as specific activity following time set aside for going to the gym, playing football and so on. There were also differences between men and women in the amount of time spent on sport with men more likely to engage in competitive sport.

3.12 Environmental and safety concerns

- 3.12.1** Like health, this was not a key motivator. That is not to imply that there was no concern about environmental issues but it was not enough to represent a primary influence on the travel choice of most people. Rather it was cited as an additional reason to explain modal choice.

"I do worry about air pollution – my sister has asthma but it's difficult to get to my job otherwise. Anyway I share the trip to work with two other people so the total impact on the environment is less than going on buses which are responsible for a lot of pollution in cities." (assistant in parcel office, aged 24, Crayford, female)

"I love cycling for the freedom it gives me – I can't stand the time it takes to go by bus. Also it's the least polluting form of transport." (salesman, aged 38, Leicester, male)

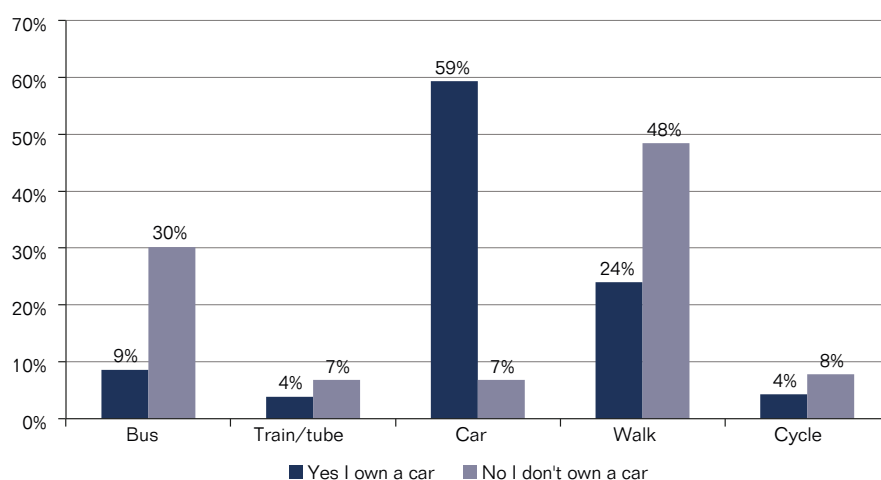
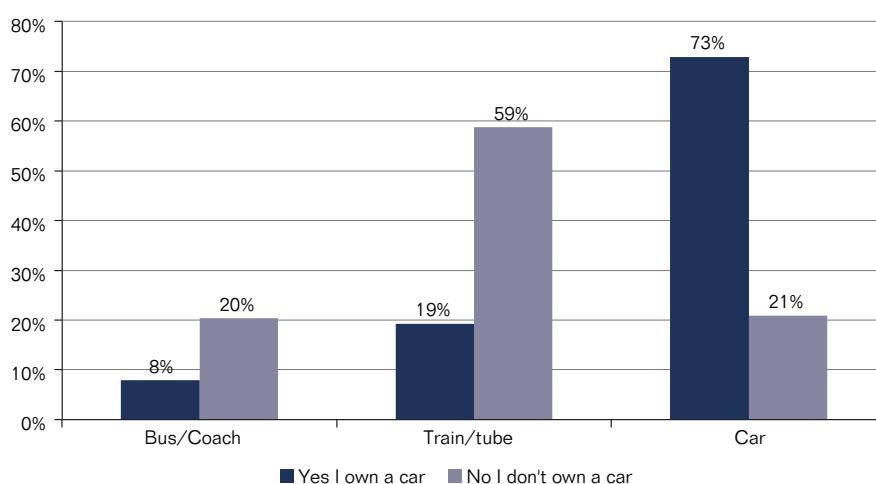
- 3.12.2** Another factor which particularly affected those who had not obtained a licence in their early 20s was concern about their own driving ability and fear of causing an accident.

"When I was 17 I got a provisional licence but never used it and now I'm worried about driving what is in effect a lethal weapon – I don't think I'd be a very good driver – I'm a bit of a dreamer and anyway I've seen some terrible near misses by drivers while I've been cycling." (bank manager, aged 33, Manchester, male).

3.13 Will the decline in driving by young men continue?

Car owners make multimodal choices

- 3.13.1** One of the aims of the research was to explore the transition from young people in their twenties to those in their thirties.
- 3.13.2** Over the sample as a whole, car owners made more trips by car but over a quarter of trips for longer journeys by car owners were by other modes.

**Chart 6 Short local trips by car ownership****Chart 7 Long trips by car ownership**

Increases in licence holding and car ownership by 30+ year olds

3.13.3 Not surprisingly, by the time they were in their 30s a higher proportion of respondents in their 30s had acquired a full car licence and car ownership had also increased (charts 8 and 9 below).

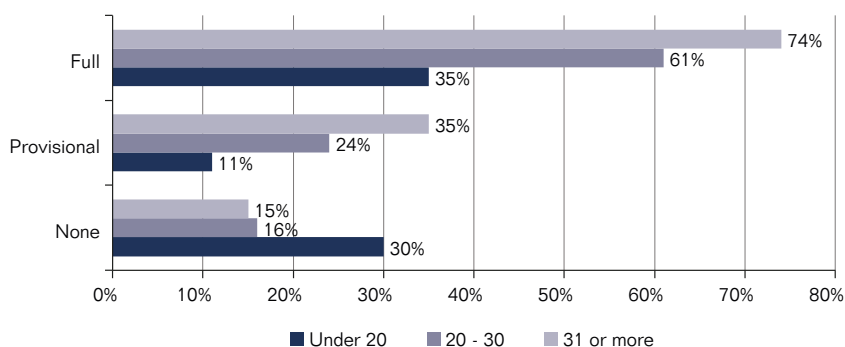
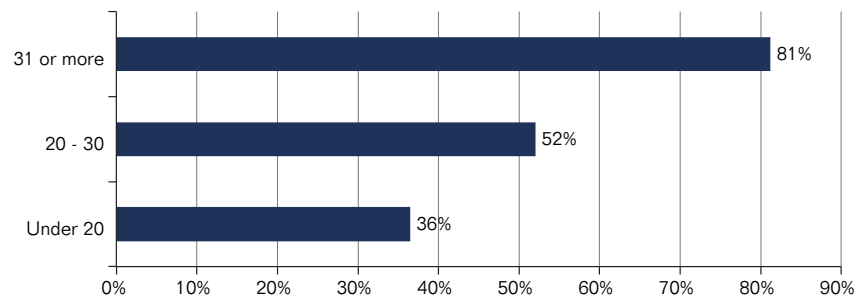
Chart 8 Licence holding by age group

Chart 9 Car ownership by age



3.13.4 An interesting finding is the difference between car use and car ownership. So for example, although 85% of 30+ year olds had a licence, only 81% owned a car. Overall the whole sample, 36% of full driving licence holders had no access to a car.

Continued multimodal travel

3.13.5 Over 30s made more trips by car and used public transport less than younger age groups for both short and longer trips. However, it is clear that other modes were also used by this age group especially walking for short trips (chart 10) and train for longer trips (chart 11).

Chart 10 Main mode of transport for short local trips by age

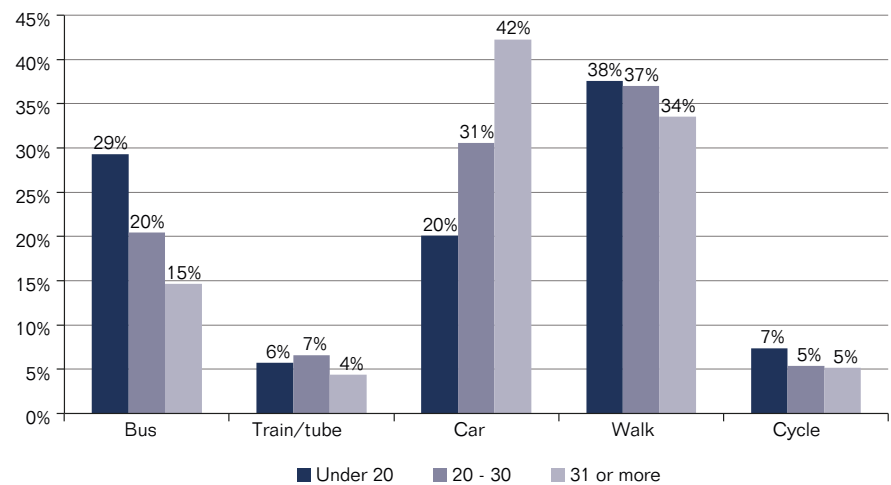
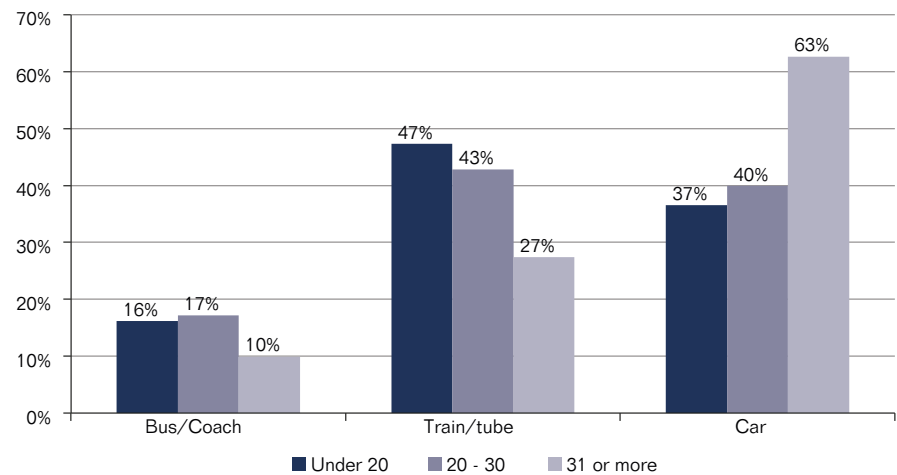


Chart 11 Main mode of transport for long trips by age





3.14 Future plans for car ownership

3.14.1 The research shows that a majority of all age groups who currently don't own a car have aspirations to acquire a car either currently (chart 12) or in the future (chart 13).

Chart 12 Would you like to own a car at the moment? (non-car owners =704)

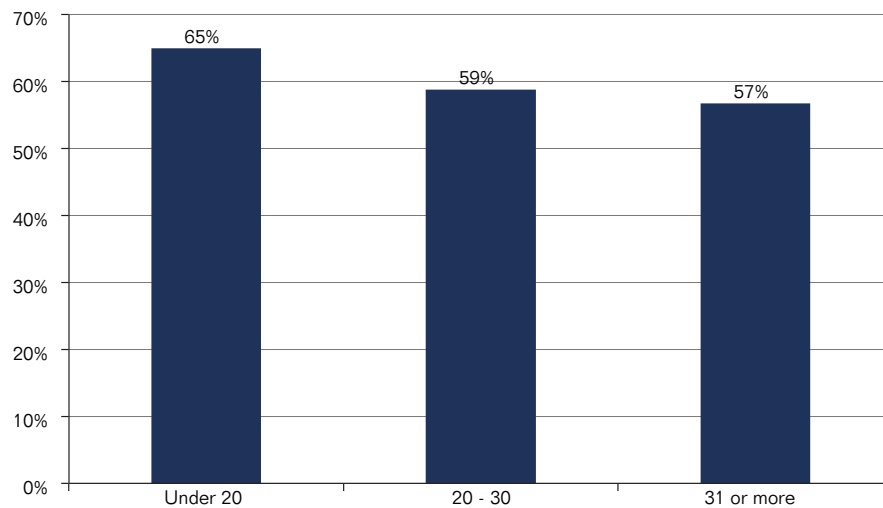
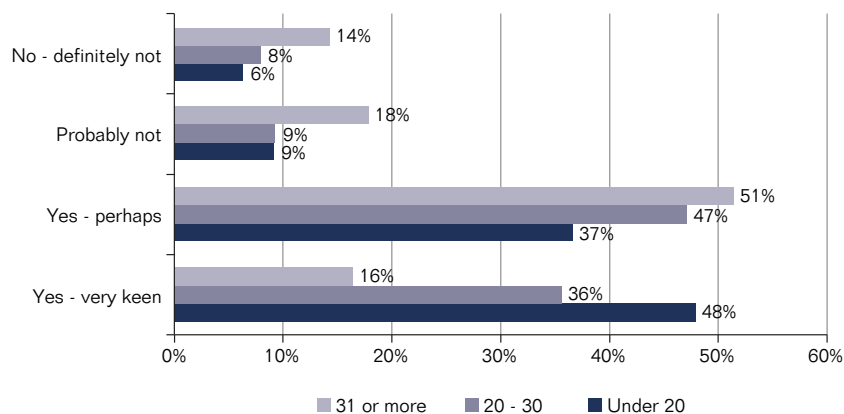


Chart 13 Would you like to have a car some day in the future
(non car owners =704)



3.14.2 Interestingly, non-car owners over 30 were more likely to reject the idea of future ownership compared to the younger age groups.

3.14.3 Reasons for deciding against car ownership were varied but one issue to emerge was failure in the theory test especially by young working class men. Nationally, theory pass rates are an average of 63% and it would be interesting to know more about the demographics of those who fail.

"I've taken the theory test and failed three times now. I've given up and accept I probably won't ever pass." (unemployed, 30 year old, Leicester, male).

3.14.4 For others the desire for a car was in competition with other consumer products. Recent US research shows that very few under 30 year olds named a make of car as a 'cool' brand and this is paralleled by UK 'cool brand' research in which only one automotive product (Aston Martin) is voted into the list of top 60 brands.

3.14.5 Another reason was doubt about personal driving ability.

"When I was 17 I never gave driving a thought but now I've got children I shudder to think about the risks I took and the near misses. I stopped driving for the whole of my 20s and now I've lost confidence or the desire to drive. I rely on my partner and walk a lot." (writer, aged 38, Manchester, male).

3.15 Conclusion

3.15.1 The evidence suggests that although many 20-29 year olds aspire to gain access to a car in their 30s, a sizeable minority do not or are uncertain.

3.15.2 One of the causes of uncertainty is the ability of today's 20-29 year olds to continue with their lifestyles when they form partnerships and have children. One of the difficulties is the lack of suitable housing and other facilities such as schools for families in central urban areas where many have lived as singles in their 20s. Another difficulty is the cost of housing in city centres. This combination of reasons often drives families out to the suburbs even though they would prefer to maintain their urban lifestyle with good access to public transport and walking destinations. Once in the suburbs, car ownership becomes a greater convenience and for some essential.

3.15.3 However, we can also say that this generation of 20 year olds and indeed many in their 30s today are unlikely to resort to the levels of car ownership or use of previous generations. Their attitudes are very different in two crucial aspects. First they have learnt about how to use the public transport system which at least in urban and along intercity routes is improving and resulting in generally positive experiences. The second reason for car use staying lower is the reallocation of road space away from cars: bus lanes, good walking environments, wide pavements and cycle lanes. They make the car journey longer and incline people to stick to alternatives.

3.15.4 Another factor is the growing tendency to separate the idea of car ownership from car use and in turn consider alternative forms of car use such as car clubs, car hire, lift sharing and the growing number of hybrid combinations in between. These trends also point to a decline in second car ownership and an associated increased in the use of public transport, cycling and especially walking which typifies one car household ownership.

3.15.5 It will be a pity if a failure to acknowledge the needs of the changing mores of the younger generation is frustrated and the opportunity to adopt more sustainable patterns missed.

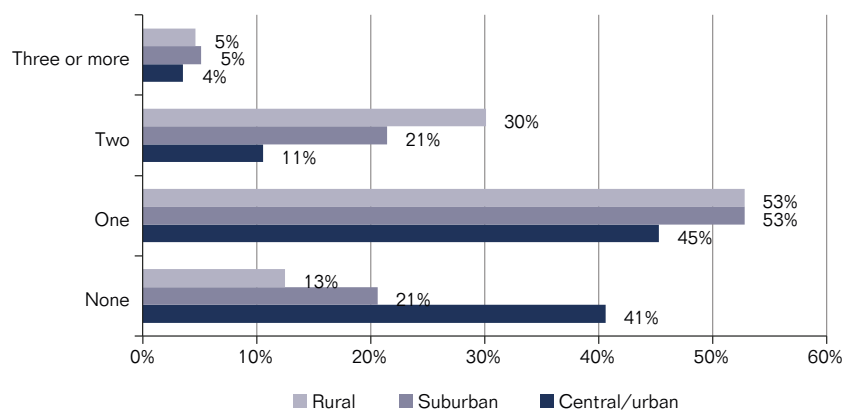


4. RESULTS: Older People

4.1 Demographic profile

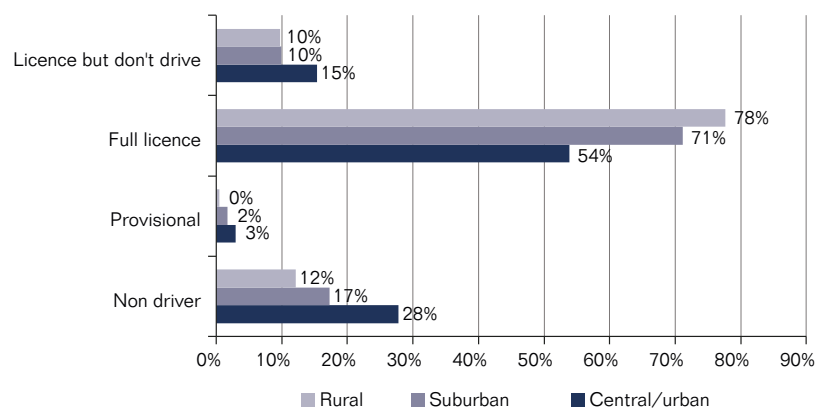
- 4.1.1** The older people who took part in the research were defined as 'over 55 or more'. The reason for choosing this relatively early age was that, as with the young people, we wanted to understand aspirations and lifestyle decisions which are often made in advance of major change such as giving up work.
- 4.1.2** In this way we also covered a range of socio economic groups and incomes.
- 4.1.3** In terms of residential area it is clear that older people are less likely to live in urban areas and this inevitably also influences car ownership rates.

Chart 14 Car ownership by residential area (over 55s)



- 4.1.4** The influence of location was also apparent in the higher proportion of older people in urban areas who had a licence but didn't drive or who were non-drivers.

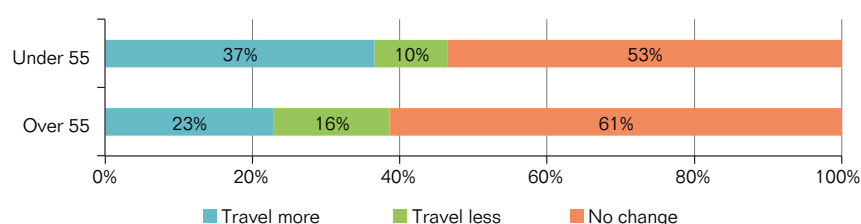
Chart 15 Licence holding by residential area (over 55s)



4.2 Attitudes to travel

4.2.1 The results suggest that compared to younger people, older people expect to travel somewhat less in the future but there are still more older people thinking they will travel more than think they will travel less. But in addition, there is a significant change taking place in the attitudes of older people to mode choice travel with a decreasing expectation that future travel will be predominantly by car and a move towards ensuring maximum access to a range of mode choices.

Chart 16 Thinking about the long term future do you think you will be traveling more or less than you do now in general?



4.2.2 There are a number of reasons for this change: a key factor is the experience of free and subsidised travel by public transport. This has led to a growing understanding of how public transport systems work including opportunities for paying less via advanced fare deals for both air, rail or by coach.

4.2.3 Another reason is the desire to ensure that when one of a couple dies, the other will be able to retain their mobility. This is particularly relevant to older women who are less likely to drive even where they hold a driving licence compared to men.

"I did used to drive when the children were at school but since then I've let him do the driving." (retired, aged 83, Peterborough, female)

"I haven't touched the car since John died – I don't really need to – I'm out of practice and I go with my neighbours to the supermarket anyway." (retired, aged 73, Woking, female)

"I drive a car but I know my time is coming, as you get older, you lose a bit of confidence so I think I will use the buses more in future." (voluntary worker, aged 75, Tiverton, female).

"There will come a point for me when I'll have to stop driving and for that reason, I bought a house in the centre of Tiverton so I could still get out and about. I don't have a parking space there and I have to rent a space in the multi-story car park which is a 15 minute walk from my house but at the moment, that is my exercise." (nurse, aged 56, Tiverton, male)



4.2.4

Even when the household owns a car the tendency is to sell the second car on retirement. However, the remaining car is often an important part of the lifestyle, especially for the husband in the case of a couple.

"We don't use the car a lot – only local shopping trips – but it's his responsibility – to both drive and maintain. After all my job hasn't changed since we retired – I'm still the housewife – but his life has changed now he's left the job so it's good he's still got the car. If he goes first I wouldn't bother with it." (retired, aged 75, Brotton, female)

4.2.5

Finally there is a move to downsize by selling family homes and moving to smaller and cheaper accommodation thus freeing up financial resources for retirement. This seemed to be a trend as shown by the growth of park estates and indeed some towns (especially seaside locations) are beginning to benefit from the specialist year round economy which can develop .

"We moved here (Park Estate, Saltburn) from Norwich. We weighed everything up and after selling up we've ended up with extra money for holidays and so on. Everything's cheaper here – and we can walk into town plus there's free bus travel to Whitby and the train. And we all help each other here and there's lots to do with clubs and good deals for pensioners. In addition I know the wife who doesn't drive will be OK if I go first." (part time electrician, aged 65, Saltburn, male)



Park Estate, Saltburn

"Lots of people round here go off to Spain or Malta in the winter – you can get a cheap flight and it's cheaper to live when you get there. It's easy to lock up and the estate people keep an eye on things while we're away." (retired, age 63, Saltburn, male)

4.3 Future trends

4.3.1 The research shows that once older drivers extend their experience of other travel modes, they travel more especially for leisure. The purchase of a senior rail card is a key turning point and the new 'Two together' card was attractive to older couples where one was 60 or older but the other younger and thus not previously eligible for reduced rail travel.

4.3.2 The crucial importance of concessionary fares was also mentioned frequently and there were many examples of people who felt they would not be able to maintain their current lifestyles without free bus passes

"Without the free bus pass I couldn't afford to go out so often – sometimes I just go there and back for the company. I wish there was a bus on Sundays too." (retired, age 87, Bishopston, female)

4.3.3 However, others still felt that free travel was 'charity' rather than entitlement and there was a related reluctance to use other 'free' options such as community transport. It was clear that some people took the view that they were 'second class' passengers and that this was on occasion reinforced by the attitude of bus drivers.

"The driver said – blimey there's no one on this bus whose paid a fare and the bus was full with some standing." (cleaner, aged 72, Preston, male)

4.3.4 Day trips are also important and the use of bus passes encourages travel and generally getting out for a growing number of pensioners. For many frequent users there is no longer any sense of 'charity' for such concessions and general understanding that bus companies benefit from the revenue. There is also resentment in areas without bus services that the concession can't be used and this situation was another factor in leading people to consider moving.

"I've lived in this village all my life but now there's no regular bus service and I can't drive anymore so I'm going to have to move. I don't think it's fair – we should have a concession to use taxis when there's no bus." (Retired, aged 77, Ponthenry, female)

4.3.5 There is also interest in new forms of mobility including scooters and electric wheelchairs and in urban areas cycling. The latter was more appealing to drivers who found the thought of sharing the road less intimidating than non drivers.

"I like cycling outside the rush hours. Bikes have changed a lot since I was young and they're a lot easier for getting up hills than they used to be. I can get about a lot better on a bike than walking and I'm thinking of getting an electric bike when I get older." (Charity trustee, aged 78, Brockley, male)



4.4 Conclusion

- 4.4.1** Older people are using a wider range of modes and are less likely to rely on cars even when they own one. To enable this and to safeguard lifestyles if they or their partners can no longer drive; they are making decisions about residential location to ensure alternative access to transport. This might put further pressure on urban property but this is counter balanced by the desire to downsize and release equity which is best achieved by moving away from city centres. The latter could be a positive strategy for the economy of some of the UK's seaside towns as well as a case for resurrecting the 'key village' policy from the 1960's.
- 4.4.2** One key issue not fully addressed by the research is the extent to which disabled people who are disproportionately elderly are prevented from travelling due to the inaccessibility of the transport system. Undoubtedly things are improving in this respect but it does still depend on location with people in rural areas having the greatest problems. However, even in the big cities there are problems with access to transport hubs, the availability of accessible vehicles, gaps in legislation and the standard of customer care offered by transport providers.

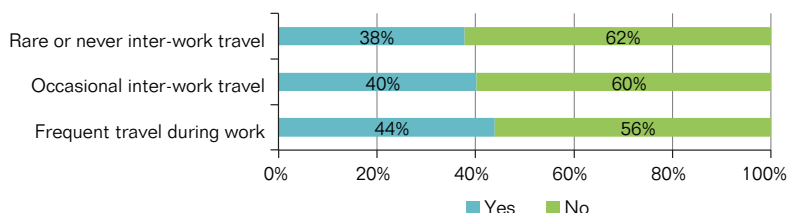
5. RESULTS: Business Travellers

5.1 Commuting and inter-work travel distinctions

5.1.1 The business travellers were selected to provide a combination of people who mainly commuted, or who occasionally or frequently travelled as part of their work. In official statistics, work related travel is divided and described as commuting or business but we have described the latter as 'inter-work travel'.

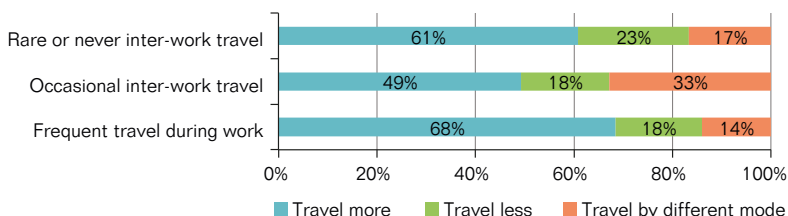
5.1.2 Around 42% of all the 712 business travellers said that their pattern of travel had changed over the past two years – the majority reporting travelling more.

Chart 17 Would you say your general travel patterns have changed in the last two years?



5.1.3 Of these the majority are travelling more especially for frequent inter work travellers.

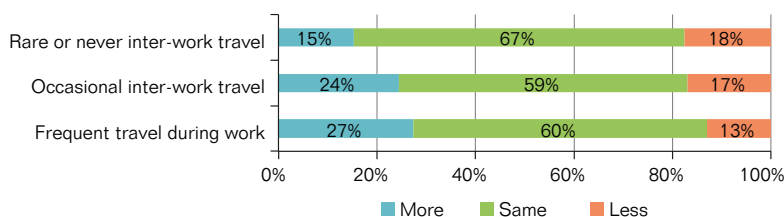
Chart 18 How would you say your general travel patterns have changed in the last two years?



5.1.4 The following tables show trends in the amount of travel by mode. The results show that for all except bus, the change has resulted in more travel by all modes for frequent travellers in the course of work. In addition even occasional travellers are generally travelling more – perhaps not unexpected in the light of the economic growth which has occurred in recent years.

5.1.5 Current car users –travel has changed in the past two years – those not travelling during work are using cars less: those travelling during work are using cars more.

Chart 19 Mode of travel - Car

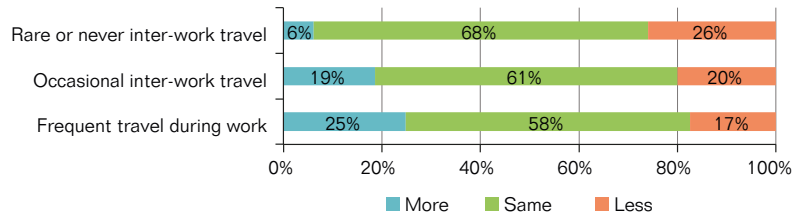




5.1.6

Current train users have also changed their travel in the past two years – those not travelling during work are using trains less: those travelling during work are using trains more.

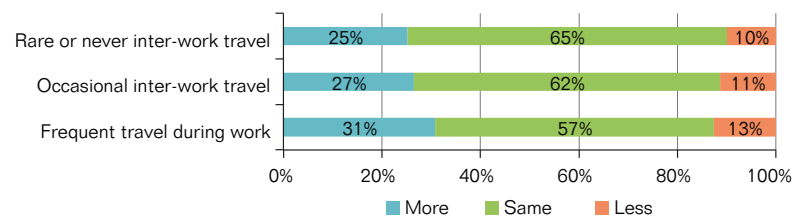
Chart 20 Mode of travel - Train



5.1.7

Current walking to or during work has also changed in the past two years – with more people walking more than walking less.

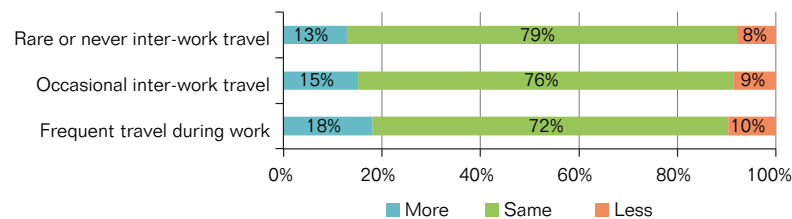
Chart 21 Mode of travel - Walk



5.1.8

Current cycling to or during work – here again there are more people cycling more than cycling less over the past two years.

Chart 22 Mode of travel - Cycling



5.1.9

In comparison with all the above modes, current bus users who report travel change in the past two years are the only group with higher proportions using bus less than are using buses more.

5.1.10

The conclusion is that business travel is increasing and that all modes are being used to meet this demand apart from bus.

5.2 Are attitudes to commuting changing?

- 5.2.1** Most people disliked commuting whichever method of transport was used and described the compromises they had made in juggling house prices, schools, time and travel costs to arrive at their current situation. The advantages of lower rents or house prices was seen as a reason for moving out of city centres but this was seen as changing due to the higher cost of rail fares.

"When we moved here (Woking) I worked out that I was about £2,000 a year better off but now the cost of my season ticket has gone up I reckon it's about evens. I'd still prefer to live out of London in principle but not getting a seat on the train means that this is dead time unless you count listening to music." (accountant, aged 37, Woking, male)

- 5.2.2** It is clear that the cost, time and lack of comfort associated with commuting is leading to pressure to work from home – at least some of the time. In this respect, the recent move to offer part time season tickets was welcomed and judged to be a good 'push factor' to encourage employers to agree to more flexible working arrangements.

"The boss is a bit of a control freak and didn't like my suggestion of working at home on Fridays but the job covers travel costs so he realised they'd save money and now it's generally accepted and in fact I'm going to try for Mondays at home next year." (Building society assistant, aged 42, Birmingham, female)

- 5.2.3** Overall, there was a lot of support for home working although mainly for one or two days a week. More than this was felt to be isolating. These views were also shared by employers who welcomed the time saved by flexible hours but nevertheless wanted to retain frequent face to face contact.

"I wasn't keen at first but they agreed to use tracking on the company phones and keep in contact during agreed hours and to be honest I reckon productivity has increased including reducing staff turnover especially by women." (Hedge betting company, 50s, Leeds, female)

"This office was built to use human beings to supplement the heating system but since it opened more people are working from home so the system isn't working efficiently!" (Consultant, working in central London and living in St Albans)

- 5.2.4** Some people were also working different hours to avoid peak travel or reduce costs.

- 5.2.5** Examples included three long 12 hour days and/or starting late or early or even different combinations on different days. Both employers and staff were receptive to this approach and many benefits were described.

"I can get an off-peak train ticket now – it saves a lot."

"With on average a fifth working from home on any one day we've reduced the car park area and transferred it to additional office space." (Manager, Building company, Woking)

- 5.2.6** However, it should not be assumed that working from home automatically leads to less travel. Both our discussions with people who worked from home and other research⁹ shows that extra travel takes place during the day (going out for lunch, etc).



5.2.7

Similarly, it seems that people who make maximum use of electronic communication, videoing, Skype, etc actually end up travelling more due to wider networks.

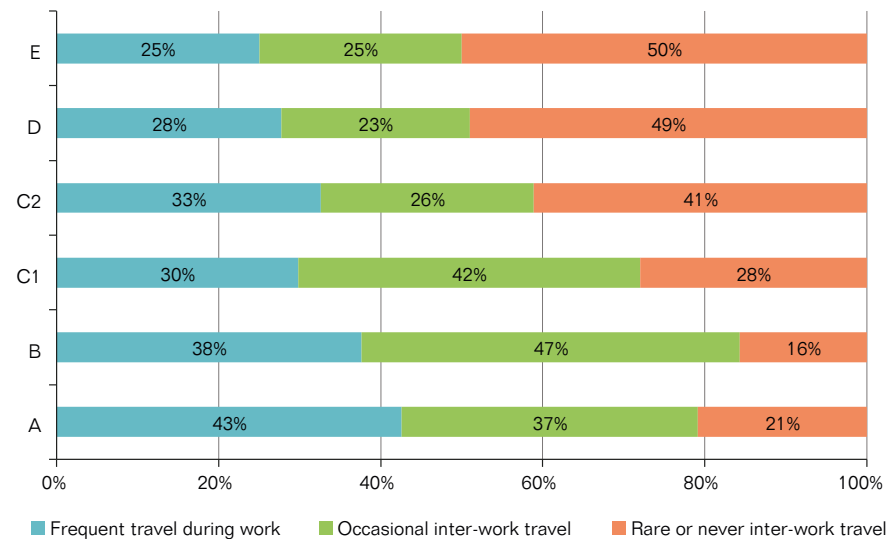
"I do a lot of business remotely by email and talk face to face by my phone or Skype at all hours of the day and night too but I reckon it leads to more rather than less travel – you want to see people and the new technology gives you contacts with more people." (self employed blogger, Market Harborough, aged 28, female)

5.3 Are inter-work patterns of travel changing?

5.3.1

The cross tabulations show that amongst our sample inter-work travel is more common amongst white collar groups.

Chart 23 Socio-Economic Group values



5.3.2

It also shows that frequent inter-work travellers are more likely to travel to work by car than those who are only commuters or make only infrequent inter-work trips. Similarly those making inter-work trips are more likely to have a household car and to see getting a new car as a priority.

Chart 24 Main mode of travel for work

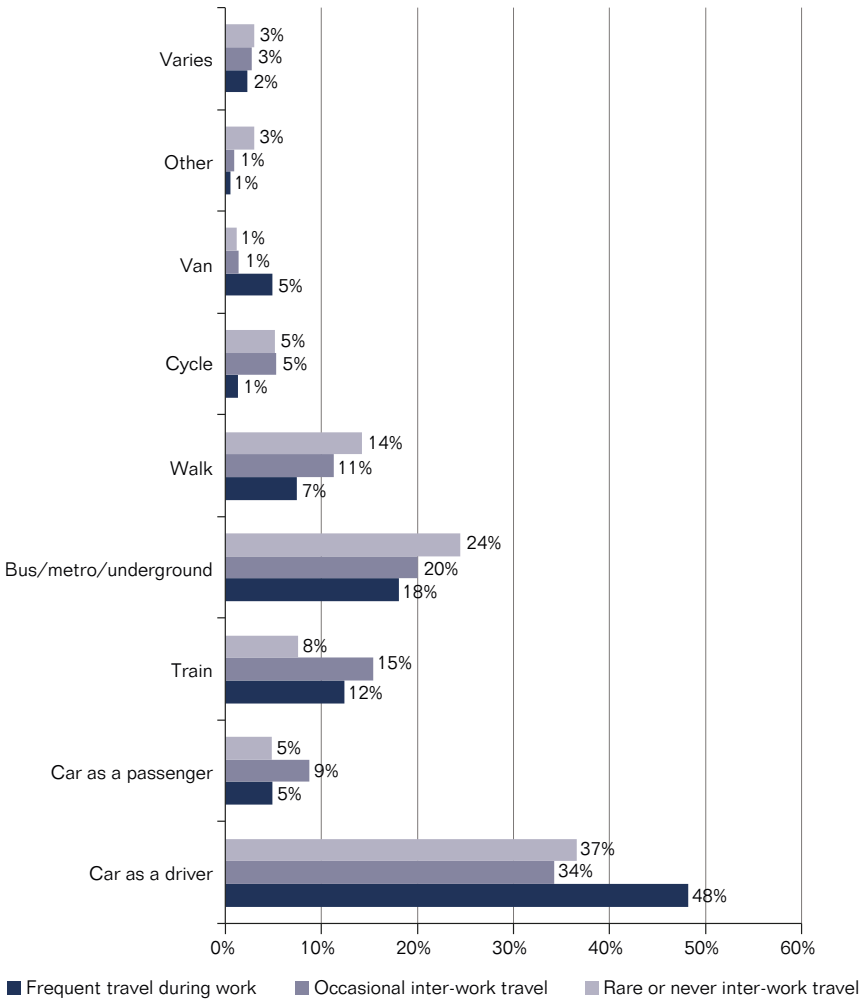


Chart 25 Household car ownership

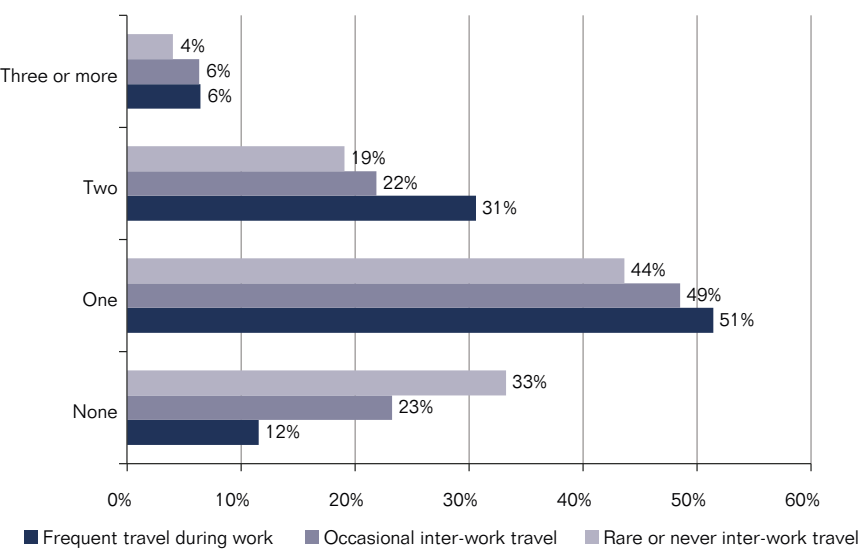
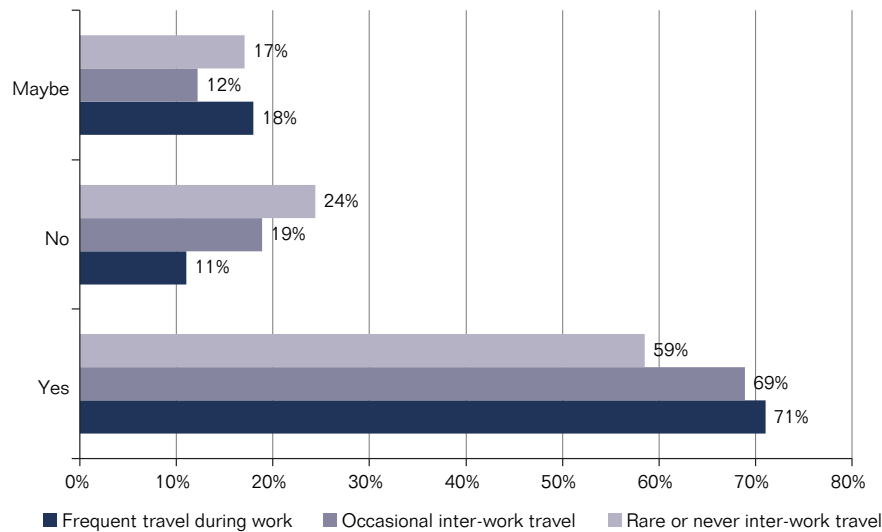




Chart 26 Is a new car a priority?



5.3.3 The conclusion is that inter work travellers are more likely to be car focused than those who don't travel during work.

5.4 Conclusion

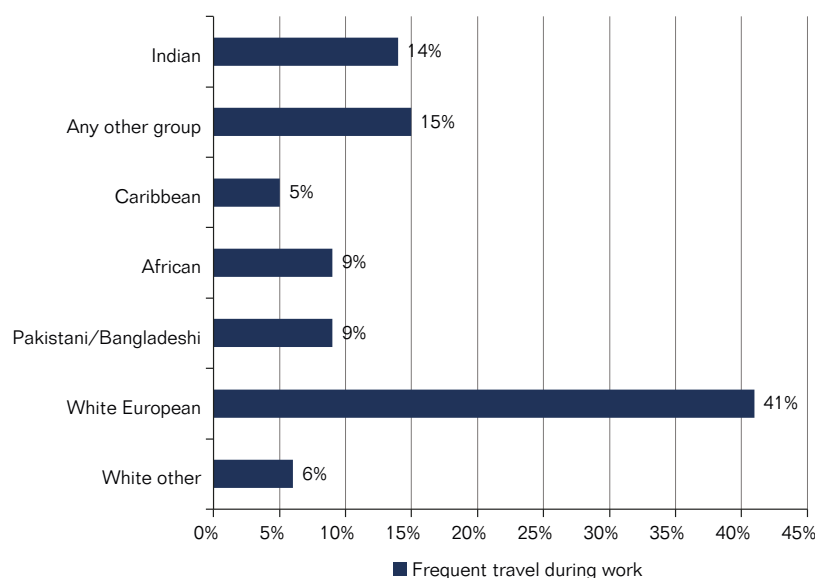
- 5.4.1** People are travelling more for both commuting and business travel. Commuting distances are growing driven by the need to access cheaper housing and other factors such as dual career families and school allocations.
- 5.4.2** Attitudes of both employers and employees are changing – for many occupations the work place is flexible although still involving the concept of a 'base' location. People are working at different times at home, in coffee bars, local hubs, in their cars, on public transport and whilst walking.
- 5.4.3** These trends are increasingly enabled by technology and to some extent by the transport industry. However, there is a long way to go to fully support this trend including in relation to fares structures, vehicle design, planning and housing policy. On a wider basis the practice of working from home is leading to tax and planning confusion but also new design, architectural and development opportunities.
- 5.4.4** In terms of in business travel, there is undoubtedly some travel substitution by methods such as video conferencing, Skype and so on but this does not seem to result in less travel overall – rather it leads to wider networking and there is still a strong desire for face to face meetings.

6. RESULTS: Migrants

6.1 Less car use and more walking

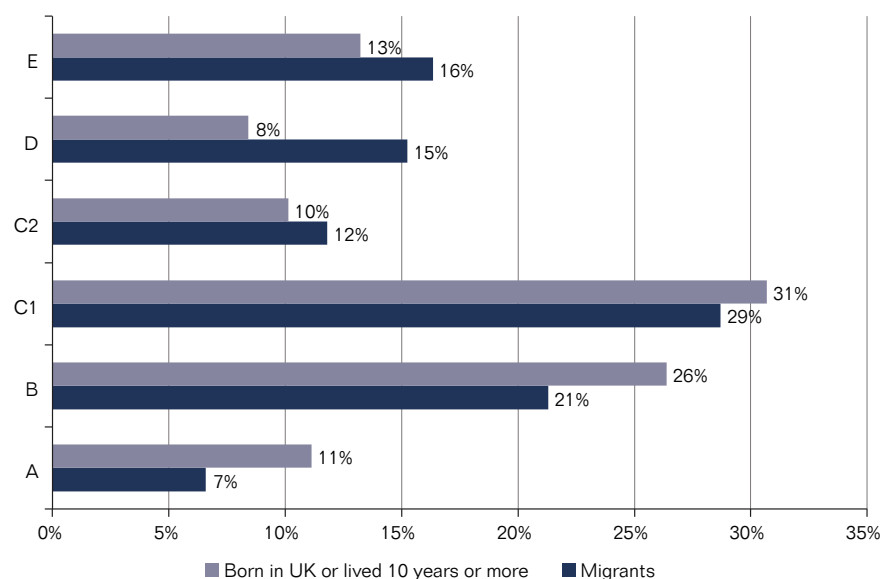
6.1.1 For the purposes of this research migrants were defined as people who had lived in the UK for less than ten years. Areas of the country with high proportions of migrants in this category were targeted for the face to face research including Peterborough, Leicester, Leeds, Brighton, London, Watford, Birmingham and Cardiff. Of the 586 migrants in the sample, 41% were from other European countries.

Chart 27 Sample profile

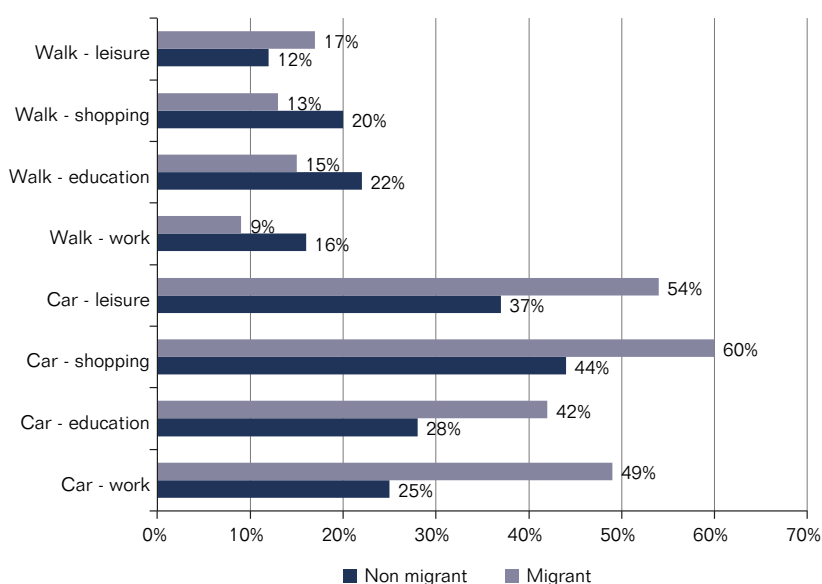


6.1.2 The final profile including the UK wide electronic results show that migrants are more likely to be living in urban areas and are disproportionately represented in socio economic groups C2/D/E compared with non-migrants. In addition migrants have other priorities such as housing which can be more expensive in urban areas and so less to spend on cars or travel in general.

"It's hard to get established in a new country. I've got teaching qualifications from Estonia but they're not recognised here so I'm working in a shop. The money is better than back home but still not enough to leave much over after I've sent some home. I'm saving up to bring my family over but it's going to take a while. Most days I take the tube to zone 2 and walk from there. (shop assistant, aged 35, East London, male)


Chart 28 Socio-Economic Group value


6.1.3 These two factors are influential in producing distinct travel patterns and attitudes to travel. Thus car ownership and licence holding is lower compared to longer standing residents and not surprisingly car as a mode of travel for work and all other purposes is lower. In contrast walking is much more frequent (with bus a little more frequent). These patterns also reflect the long hours which some migrants work and also for some the provision of work buses especially those employed in remote rural areas or building sites.

Chart 29 Modal choice


6.2 Locality

6.2.1 However, car ownership is not the only influence on mode choice. As with all groups in the total sample, car ownership increases with higher rates in rural areas than urban and with suburban in between. However most migrants live in urban areas and there is also a tendency for migrants to cluster in residential areas near to work and specialist shops and other community facilities which are likely to be within walking distance and this applies to all migrant groups albeit with different socio economic profiles.

"I moved to Battersea because there's a lot of French speaking people round here ...in restaurants, my doctor and a French nursery school." (unwaged, mother, aged 38, London)

"The Golden Mile is brilliant (Leicester specialist food and jewellery centre). We love living in the area – everything's handy." (self employed, aged 40s, Leicester originally from Sri Lanka)

6.3 Length of residence

6.3.1 Another factor is the length of time that migrants were planning to stay, with many Europeans especially expecting to return to their country of origin.

"There's no real need for a car here in Leeds and anyway I'll wait until I go home in a few years to think about getting one." (factory worker, Italian, 20s)

6.3.2 Similarly, air travel was a more important factor in explaining travel expenditure with holidays frequently related to travelling back to the country of origin.

"We don't go on holiday in the UK – our whole family fly home to Albania every other year." (university administrator, Czech living in Bradford, 40s)

6.4 Cultural comparisons and influences

6.4.1 There is a strong tendency for migrants to compare their experience of transport in their home countries to those in the UK, for example in terms of concessionary fares, vehicle design and information. Generally public transport in the UK was seen as more expensive than in other European cities but others from more originally rural communities welcomed the comprehensiveness of the UK urban transport 'offer'. The extent to which comparisons were favourable or unfavourable was a strong influence on public transport use.

"In Germany students get free transport. When I came here it was cheaper to get a car." (student, 20s, Reading, originally from Malaysia)

"In South Africa I had to have a car for personal safety so it's great to be here where the underground and even the night buses are safe." (builder, 40s, Woolwich)



6.4.2

Another comparison was made with facilities and attitudes towards cycling in the UK compared to other European countries. There was general agreement that motorists were more aware of cyclist safety elsewhere.

"When you first get here you are shocked by the way motorists behave. I was nearly killed – they just don't seem to see you and it's made worse by the lack of cycle lanes here." (teacher, originally living in Denmark now in Cardiff, 60s)

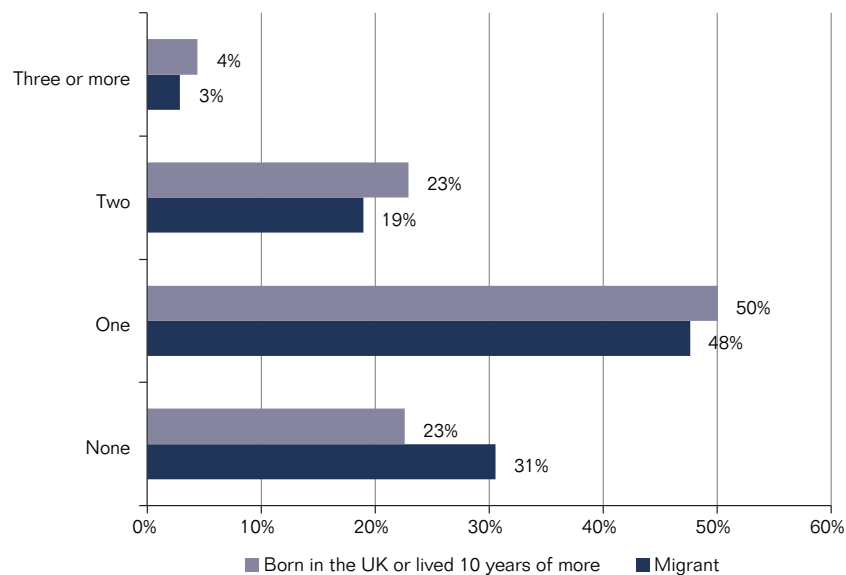
"I don't know the figures but I would bet that a lot of the cyclists who get knocked down are foreign and not used to the traffic conditions for cyclists in London." (hostess, originally from Holland living in London, aged 39)

6.5 Attitudes to car ownership

6.5.1

Lower rates of car use and ownership don't imply that they will continue as migrants become settled. Nearly a quarter of migrants aspired to car ownership with two thirds of these judging this to be a priority albeit one that would take a while to achieve.

Chart 30 Car ownership



6.5.2

Indeed acquiring a car was seen as a sign of economic and social progress.

"We hired a posh car for the weekend and sent back a photo to my grandma pretending it was ours – she was so pleased." (roofer, originally from Ethiopia now in Luton, aged 30s, male)

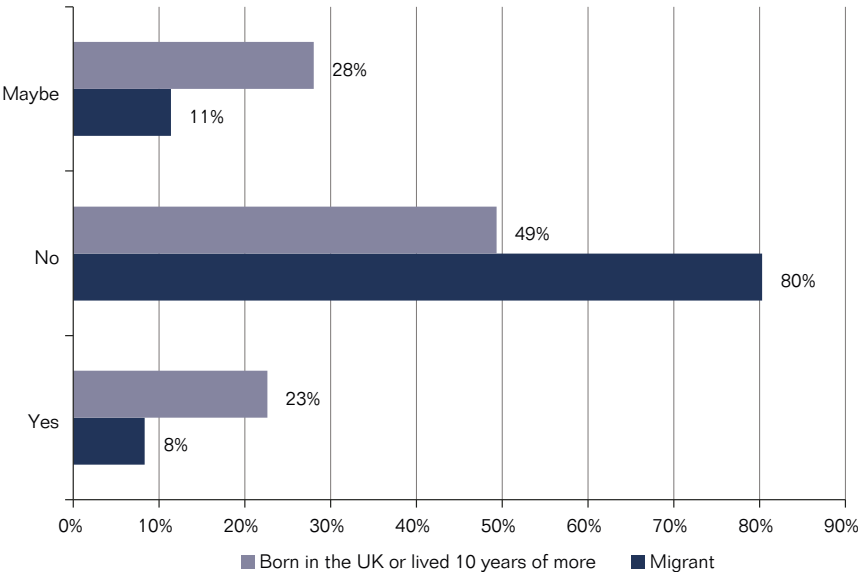
6.5.3 For others, a car albeit a cheap one was essential for work purposes especially for rural and shift workers and in this context there was a tradition of car sharing amongst work groups or even families. This led to problems amongst some communities in terms of legality and insurance rules who were used to a system whereby the vehicle rather than the driver were insured. Others were unclear about the rules for licence holding and the validity of licences from other countries.

“In Poland the whole family paid for the car insurance and when my brother crashed it we all chipped in for the repairs.” (electrician, 40s, Preston, male)

“If you go across to France for the day you can carry on using your international licence for another year.” (gym instructor, 20s, originally Polish living in Brighton, female)

6.5.4 Nevertheless, it is clear from the research that car use is lower amongst migrant groups for economic and locational reasons and this is demonstrated by the majority of those who don't currently have a car (a third) not planning to buy one in the near future.

Chart 31 Do you expect to have a car in the coming year?





6.6 Coaches

- 6.6.1** Many of the migrants had experience of coach travel. European migrants had often travelled by coach from their countries of birth to the UK and also for visits home. Others made use of the UK internal coach system mainly for educational travel or for work. This was mainly on grounds of cost but also in some cases with well-established routes - for convenience.

"Megabus is great – I've managed to get fares under £10 all the way to Scotland."
(student, aged 19, originally from Australia living in Brighton, female)

"There's a lot of overnight coaches from Victoria to Poland including to my home city which isn't convenient by air and a lot more expensive too. It may take longer but you can go door to door without a lot of hassle." (unemployed, living in London, male)

6.7 Legislative issues

- 6.7.1** There were many references to the different licencing and insurance regimes especially in different European countries.

"It's OK if you live down south, re validating your EU licence every 6 months when combined with a cigarette and booze shopping run makes it feasible, covering the ferry costs, but a bit dodgy to tell the truth." (unemployed, living in Wakefield, aged 30s, male)

- 6.7.2** The cost of insurance was a key factor although not so much of an issue for older migrants but there was general agreement that it was prohibitive for people under 25.

"They'd be better off going back to Poland" (Polish, over 25 years old, male)

- 6.7.3** Others mentioned the incompatibility of insurance rules.

"I had big problems getting my insurance transferred from Germany to England – you wouldn't think we're supposed to have a common EU transport policy."
(translator, aged 35, Peterborough)

6.8 Left hand driving

6.8.1 For some people, the need to get used to left hand driving was a mental barrier and although it was agreed by licence holders that it was not a problem, it did seem to act as a mental barrier for some resulting in tipping the scale against car use at least during the early stages of arrival in the UK.

"I was nervous about driving and had a lot else to cope with so I didn't get a car and somehow now I don't think I'll bother." (shop assistant, aged 21, originally from Greece living in Romford, female)

"I think I need lessons first – maybe I'll go for a car after that but I don't really need one anyway." (doorman, aged 55+, originally from Mozambique, living in Manchester, male)

"I thought about bringing my car over (from France) but in the end I thought it'd be safer to get a right hand drive although I haven't got around to it yet." (student, London, female)

6.9 Conclusion

6.9.1 Both the country of origin and the planned length of stay in the UK affect car ownership rates. Migrants as a whole are less likely to travel by car than non-migrants but the longer migrants live here the more likely they are to acquire a car. However, the habit of walking and proximity to destinations is likely to continue so overall car as a mode will not increase as fast as the population growth of this group would otherwise indicate from simple extrapolation.

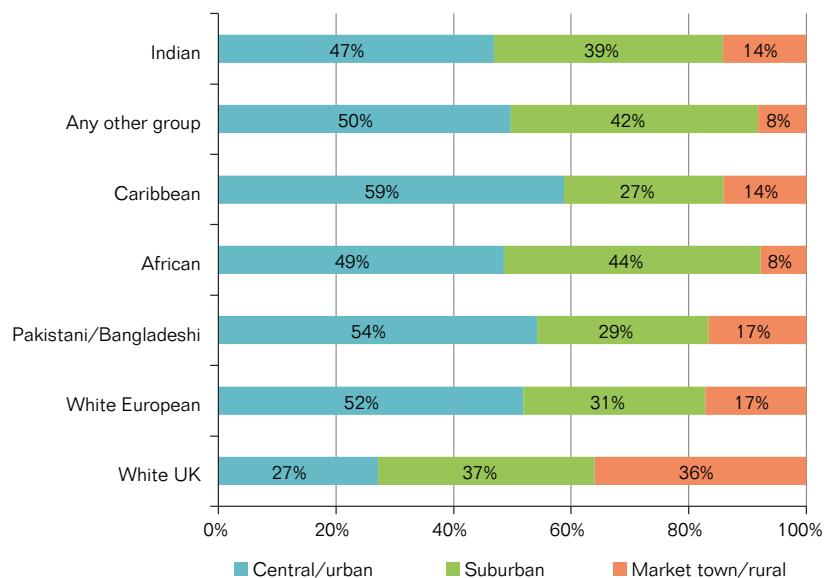
7. RESULTS: BAME Groups

7.1 Demographic factors

7.1.1 It is clear from the literature review and demographic profile of the research sample that there are huge differences between and within ethnic groups in terms of socio economic and residential location which influence attitudes to transport and travel patterns.

7.1.2 In our sample there is a major difference between the white UK population and other ethnic groups with the latter on average twice as likely to live in urban areas.

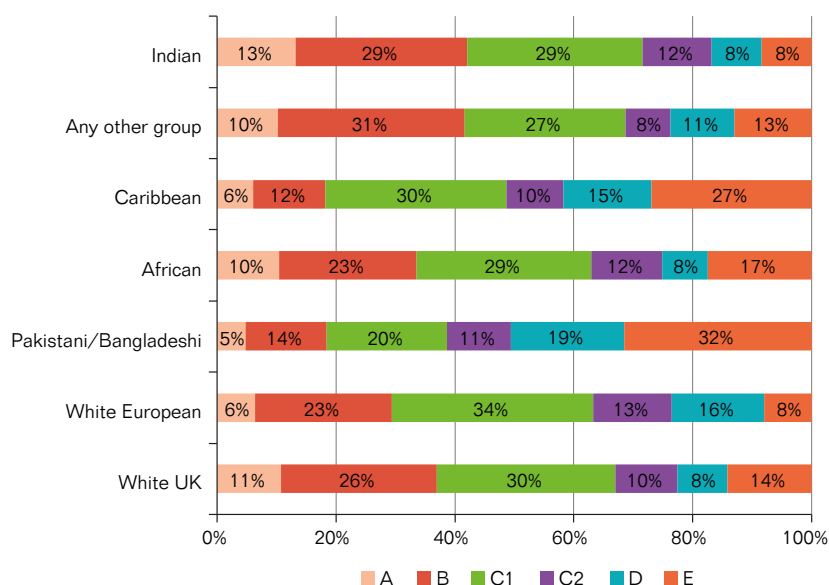
Chart 32 Residential area



7.1.3 In terms of differences between different ethnic groups, people of Indian, Jewish, and far eastern ethnicity were more affluent compared to those of Caribbean and Pakistani/Bangladeshi origin.



Chart 33 Socio-Economic Group values



7.2 The Indian community compared to other BAME groups

7.2.1 Such differences also relate to the relative affluence of the Indian community, many of whom told of growing incomes, increased travel and car ownership within the past two years.

"I'd say that the recession has given the Indian community an advantage over the white population. We tend to finance our businesses from within the family and don't rely on banks so much. We're more resilient to recession." (self-employed auto business, Leicester, aged 50, male)

7.2.2 Thus Indians had similar rates of car ownership to the White UK population and indeed were more likely to live in two plus car households than all other BAME groups. Rates of licence holding were also higher than for other BAME groups.

"In our community cars are a sign that the family is doing well so we tend to get high end cars to back this up. After all as we still live in the same area which is all terraced houses your car is the main way of showing it." (Asian (Indian) business woman, Evington, originally from Madagascan origin, 40+)

"I bought both my sons cars for their 18th birthdays and I'll do the same for my daughter. What's the point of working hard if you can't have something to show for it?" (business man, Leeds, Asian Indian origin)



Chart 34 Household car ownership

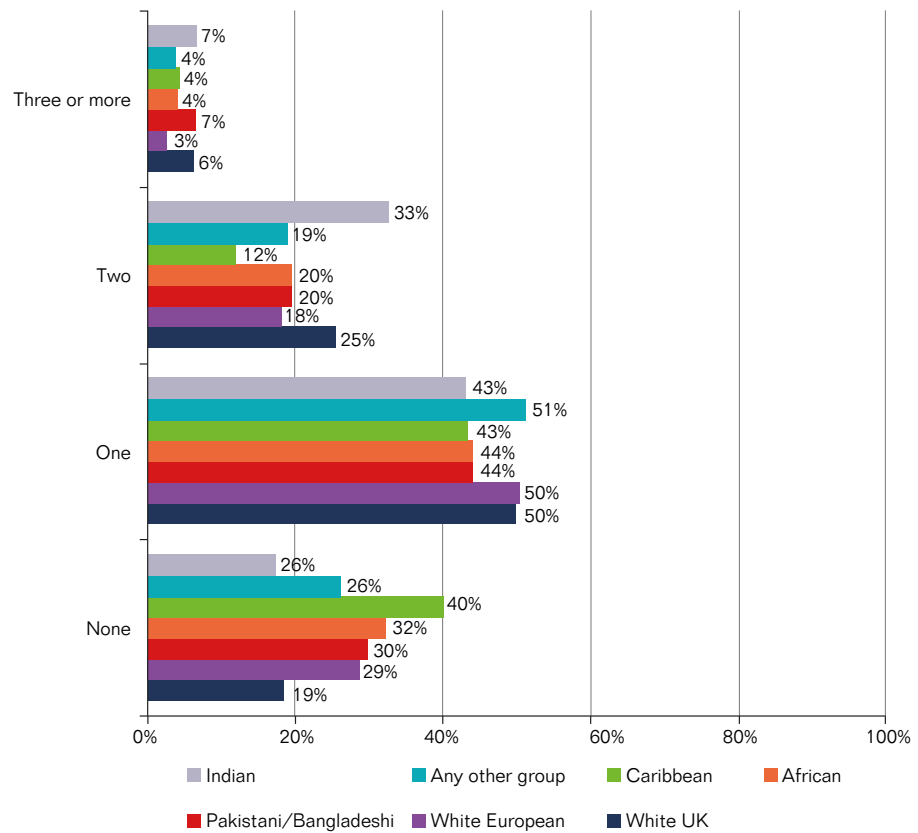


Chart 35 Licence holding

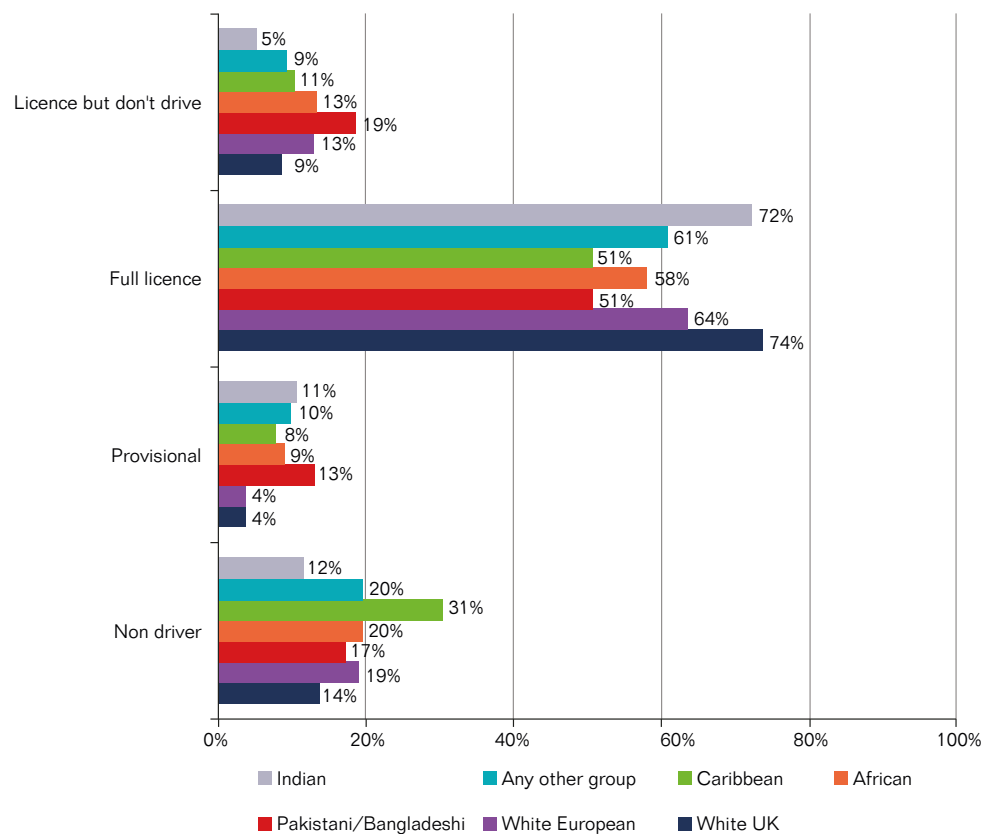
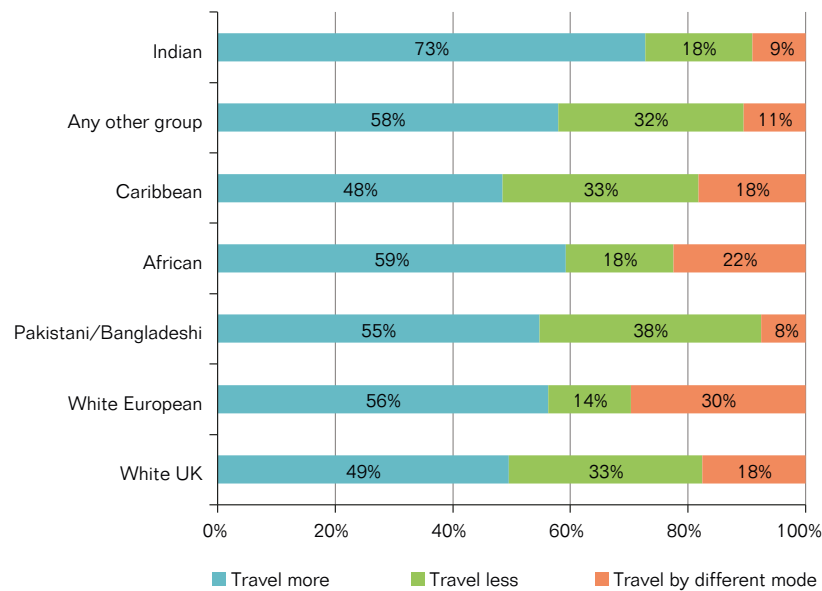
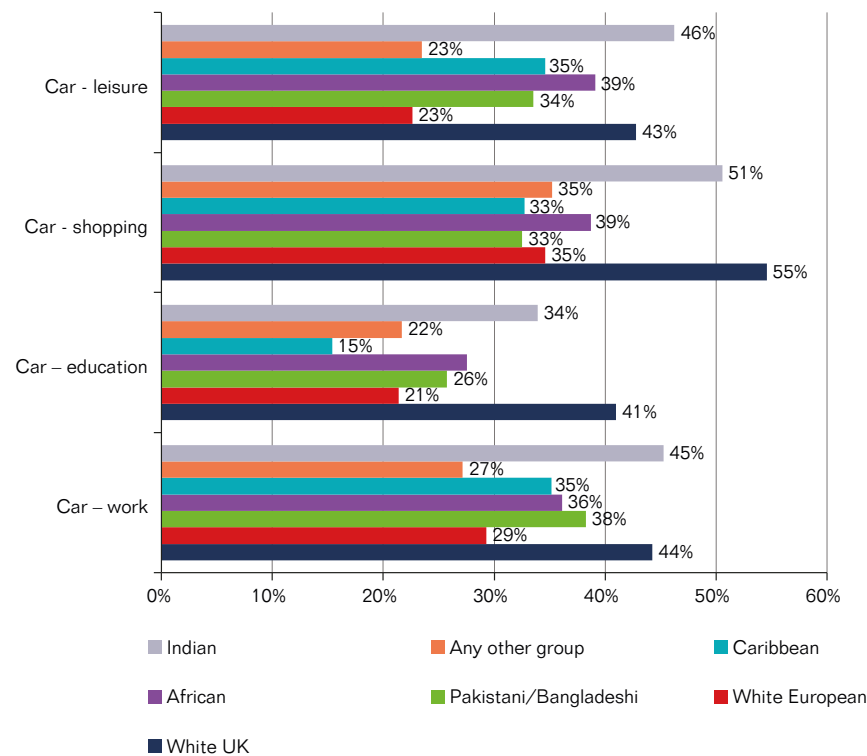


Chart 36 Would you say your general travel patterns have changed in the last two years



7.2.3 Further evidence of the different travel patterns of the Indian community is shown by car use for different purposes whereby the Indian community is similar to the White UK group and in contrast to other ethnic groups.

Chart 37 Modal choice





7.3 Aspirations of all BAME groups

7.3.1 However, the desire to travel more and acquire cars is not unique to the Indian community. Many people from other BAME groups expressed a similar desire which was often linked to aspirations to earn more money.

7.3.2 Thus in answer to questions about travelling more in the future both in general and for all purposes, BAME groups all expected to travel more than White UK groups.

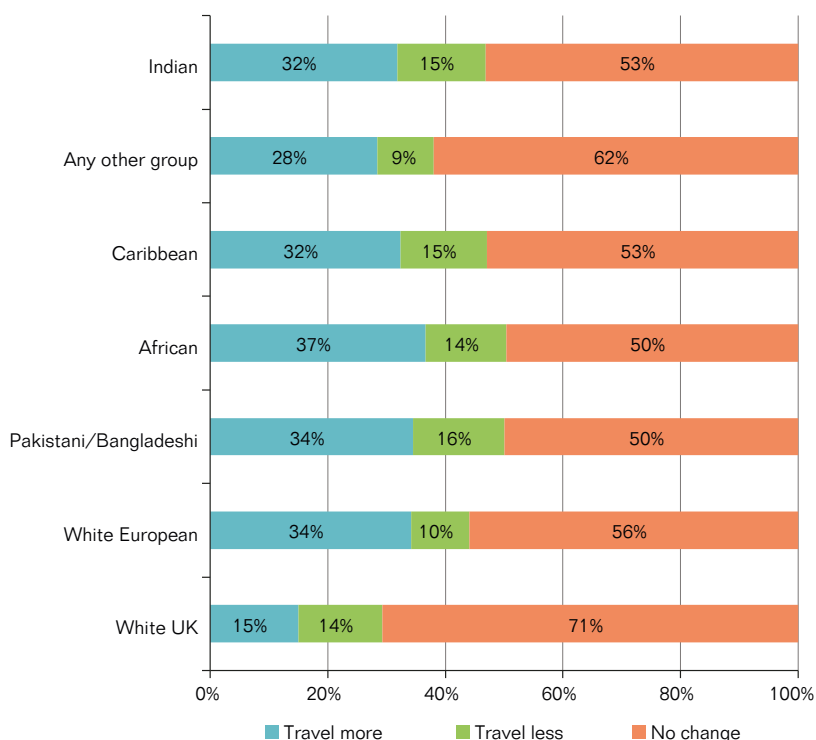
7.3.3 Such aspirational views were also related to the need to improve housing situations and the associated locational changes were judged likely to increase travel especially for work.

"It's getting too expensive round here (Ealing) – we're too crowded and the children need their own bedrooms. We're planning to move looking to move out to Milton Keynes which would mean more travelling for work and family but it's a trade-off." (restaurant owner, Chinese, London, male)

"We used to live in Slough where my business still is but we always planned to move further out. The schools are better here (Buckingham) and we love the house." (bus driver, African, 40s, male)

7.3.4 There was anecdotal evidence of van or taxi driving being greater in certain communities (e.g. Pakistani) but the licensing statistics do not record ethnicity. It would be useful if this could be remedied.

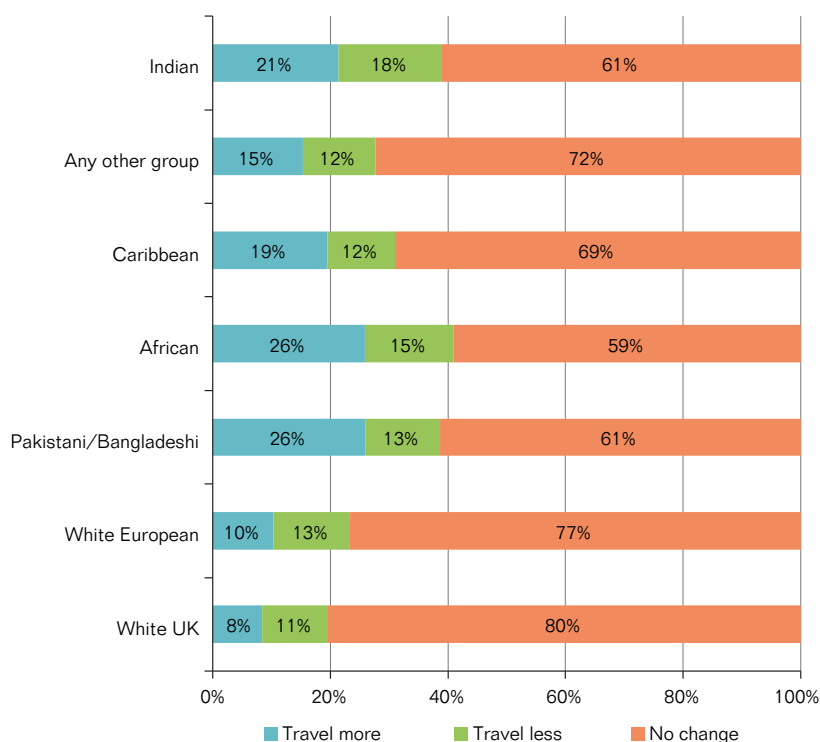
Chart 38 Thinking about the long term future do you think you will be travelling more or less than you do now for work?



7.3.5

Shopping trips were also judged likely to increase since there would still be a need to return to areas with specialist shopping facilities.

Chart 39 Thinking about the long term future do you think you will be travelling more or less than you do now for shopping?



7.3.6

For many BAME groups this desire to travel more was strongly linked to the desire for a car.

"My dream is to get a nice car to take the family to church – it's a nightmare going on the bus on Sundays especially as the bus lanes aren't in action. You don't want to be stuck on the bus with your best clothes on for hours." (Barber, age 40s, Afro Caribbean, London, male)

"In our community we don't want to go back to riding bikes unless we have to." (unwaged, Pakistani, female)

7.3.7

Similarly when asked about car purchase plans in future BAME groups were more likely to say they did plan to buy one and were also more likely to say that such a purchase was a priority.

Chart 40 Do you expect to have a new car in the coming year or so?

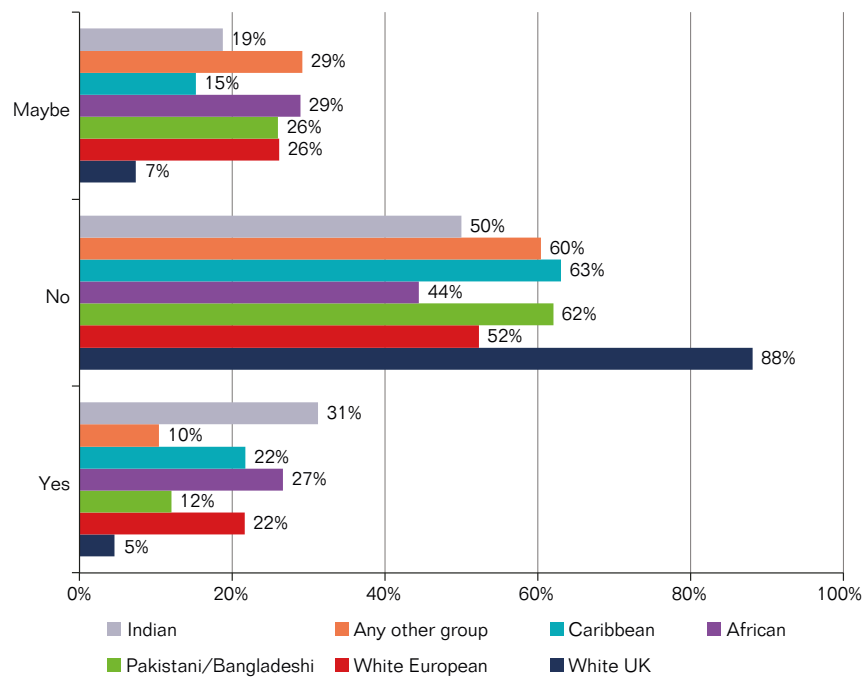
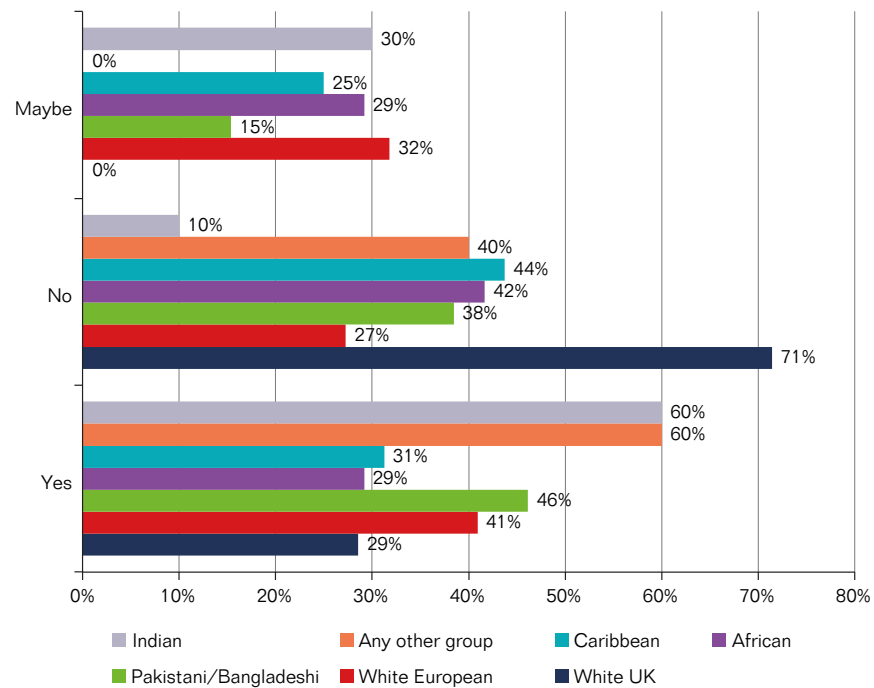


Chart 41 Is a new car a priority?



7.4 Other modes of travel

Buses and Coach

- 7.4.1** Although less pronounced than walking, BAME groups (Indians excepted) also had higher rates of bus and coach travel. The two modes were not distinguished in the hard data but discussions suggest that there are distinct patterns and routes of coach travel for particular migrant groups particularly for shopping, religion and family visits. These routes are to some extent 'under the radar' and not depicted in national timetables although some such as those by the New Bharat company are operated under the aegis of National Express and are a feature of most urban areas with significant ethnic minorities.¹⁰

"We go to Southall with Thandi coaches (from Leicester) at least once a month for shopping." (community worker, Pakistani, Birmingham, female)

"I use the coach from Wolverhampton to the Temple at Smethwick." (factory worker, Pakistani, male)

Train

- 7.4.2** Train travel was a relative mystery to many of the minority ethnic groups in our research especially for longer distance trips. The general view was that it was very expensive and there was little knowledge of advanced fares or travel card concessions. The exception were students, higher status business travellers or commuters but they too often expressed preferences for switching to car.

7.5 Conclusion

- 7.5.1** There are clear differences in attitudes and patterns of travel between ethnic groups with some having more in common with the white UK group than other BAME groups a factor related to both socio economic status and to a lesser extent specific cultures.
- 7.5.2** Family size is another influential factor with the cost of travel by public transport for larger families varying by area depending on fare structures and sometimes indicating car ownership as more cost effective.
- 7.5.3** Nevertheless BAME groups in general have stronger aspirations to car ownership and less inclination to use other modes especially bus and cycling. Even train is considered less often since once a car is acquired this tends to be the default method both for reasons of status and the economics of travelling with larger family groups.
- 7.5.4** Aspirations also lead to plans to move away from the inner city but still to return for shopping and to a lesser extent work. However moving out is also related to the push factor of rising housing costs in central urban areas especially London.

10

For example the Chinatown intercity coach company 'Chinatown' in USA Journal of Cambridge Studies Volume 8, No. 1 36 "The Growth of Chinatown Bus: Beyond Ethnic Enclave Economy in America LONG D & HAN Qiming <http://journal.acs-cam.org.uk/data/archive/2013/201301-article3.pdf>



8. Reflections on the Results

8.1 Wider discussions

- 8.1.1** A number of themes have emerged from the overall results of the 'On the Move' study – not just from the direct research itself but as a result of discussions with professional colleagues at conferences and workshops throughout the two years of the project. The themes below are a summary of the key conversations in the light of the research results.

8.2 Car ownership versus use

- 8.2.1** There is a clear decline in the role of the car as a status symbol especially by particular demographic and social groups such as young people, professional urban residents and older people.
- 8.2.2** This trend is exacerbated by the increase in urban living whereby public transport is plentiful and prioritised over cars so it is increasingly difficult and not very 'cool' to demonstrate status via car ownership.
- 8.2.3** Another factor in explaining different patterns of travel is the increased availability of new types of offer and what has been called 'the sharing economy' enabled by the Facebook model and as shown by Airbnb whereby people rent out rooms. In transport, these include leasing, car clubs, car sharing, lift giving and demand responsive taxi services. All these arrangements are becoming more common and even offered as packages by car manufacturers and rental firms – for example GM Ventures, the investment arm of America's biggest carmaker, was among the investors who put \$13m into RelayRides in 2011. Similarly, ZipCar, a pay-by-the-hour car-rental firm that maintains its own fleet of vehicles, led a \$14m investment in Wheelz, a peer-rental firm, in 2012. ZipCar was in turn acquired by Avis, a conventional car-rental firm, in January 2013 for \$491m, giving Avis a stake in Wheelz. And so it goes on¹¹. In the future self driving vehicles will be added to this menu. Once people have a choice of such services the tendency is to care less about the status of any particular car and simply base choice on functionality.

8.3 New patterns of shopping

- 8.3.1** Much has been written about home deliveries and our research suggests that people are also increasingly receiving personal deliveries at their place of work¹². This in turn is leading to interest in hubs at key points especially at stations which in turn is encouraging travel by public transport. The rise of 'metro style' outlets for the major supermarkets is also significant in enabling people to carry smaller loads which don't require a car. As one director of a major food retailer told us *"most of our customers used to be trolley cases and now they're mainly basket cases"*.

11 <http://www.economist.com/news/technology-quarterly/21572914-collaborative-consumption-technology-makes-it-easier-people-rent-items>

12 TfL research for the run-up to the London Olympics estimated that 55% of deliveries to offices were personal : Skadden "London 2012 Olympics Planning" (2011)

8.4 The role of technology

- 8.4.1** There is no doubt that technology is affecting work patterns and that there is a clear trend towards less division between work carried out in offices or other work locations and work at home or whilst travelling. The increase in the use of long distance rail for business travel is a clear indication and the debate about the value of time in this context is well known. However, this doesn't imply that the car is a deterrent. Our research has shown that people also use their cars for working either by phone whilst travelling or parking in places with good signals to make confidential calls or work on lap tops. There are interesting implications for designers of both trains and cars in this context.
- 8.4.2** On a broader basis the availability of GPS and real time information is influencing modal choice as with the teenagers and young people in our research who preferred to communicate via their smart phones on a continuous basis and not take the time out which would be required when driving.
- 8.4.3** Technology also led to greater perceptions of personal security when travelling by public transport supported by the role of real time travel information and satellite location of individuals. This was especially valued by parents in allowing independent travel for teenagers or for others concerned about vulnerable older travellers.
- 8.4.4** Another implication of transport related technology is that the boundaries between the information provided by travellers and travel movements and wider business will merge. It has even been suggested by foresight work such as the Future Agenda project that cars or travel costs could be provided free in return for the information thus gained.¹³





9. Conclusion

9.1 A strong desire to travel more

9.1.1 One of the early questions in the interviews with all demographic groups was about whether people felt they had travelled more or less in the past two years and what they expected to do in the next two years. It was clear from the answers that most people interpreted this as all trips ranging from air travel to walking to local shops and by all modes.

9.1.2 The results show that in all groups there were greater proportions judging they had travelled more in the past two years than thought they had travelled less (chart 42 below). In addition higher proportions thought they would travel more in the future than expected to travel less although the largest proportion in both groups expected no change (chart 43 overleaf). The need to travel further for work and aspirations to travel more for leisure were the most common reasons given for travelling more. This may not equate with currently published NTS data based on the actual trips of a representative sample of the whole population. However, it does tell us a lot about people's perceptions and aspirations. Some have suggested that the desire to travel is an inherent human need and indeed this is an issue pursued by another ITC initiative "Why Travel".

Chart 42 Travel more or less in the past two years

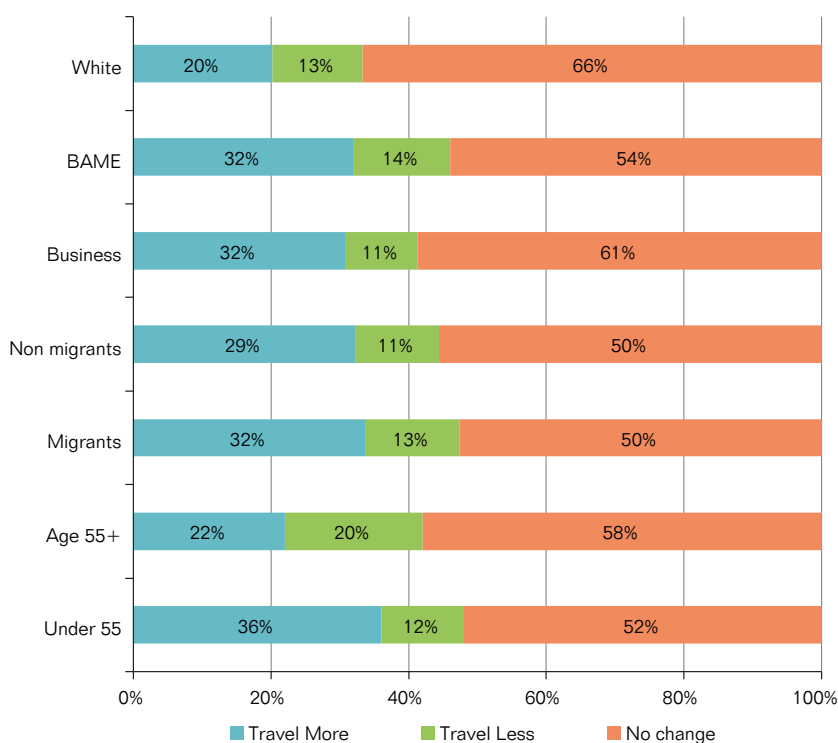
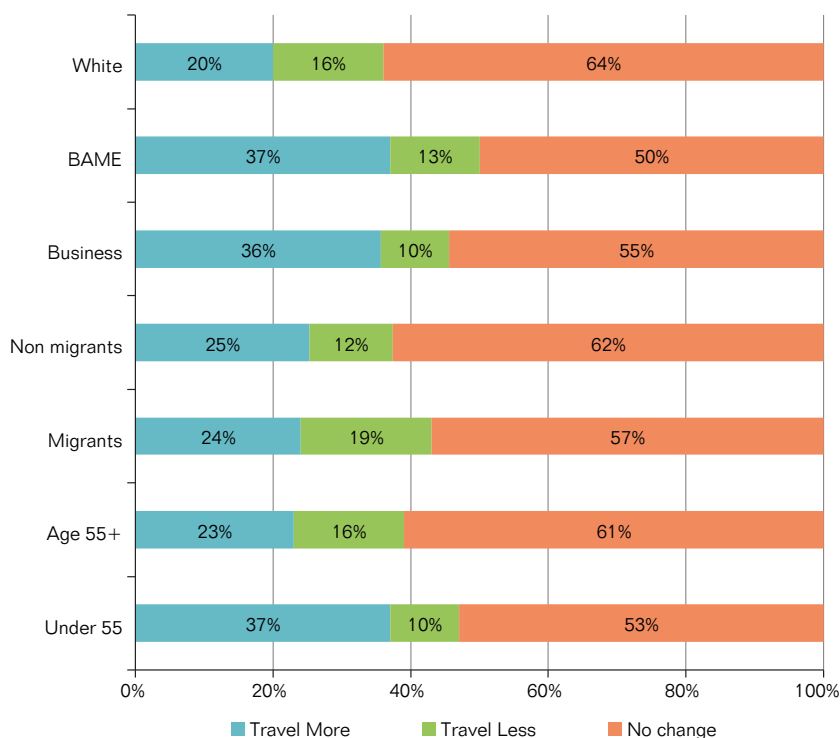


Chart 43 Travel more or less in the future

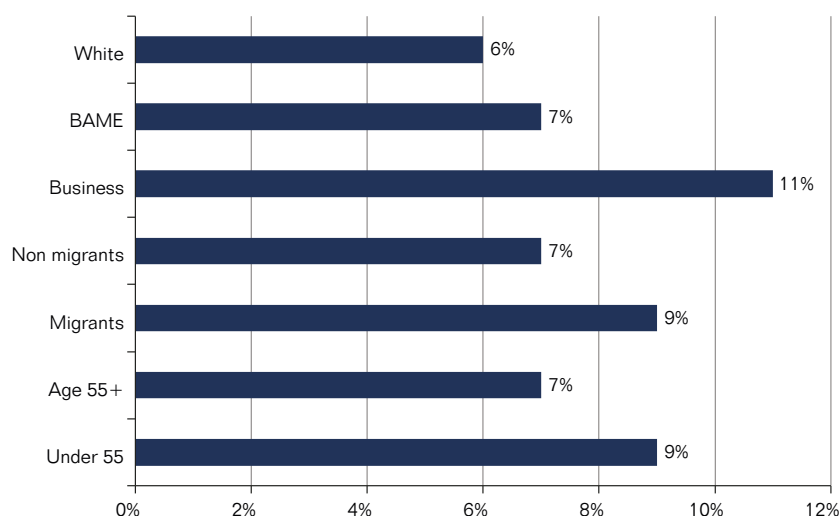


9.2 Changes in attitude to modal choice

9.2.1 However, the desire to travel more does not imply an automatic increase in car trips. The attitudinal work and to some extent the statistical analysis shows that people are choosing a wider range of modes and of those who reported travel change in the past two years many identified changes in their use of mode (see chart 44 below). It is clear that the days when people just leapt into their cars without thinking about alternatives are diminishing and this is supported by growing knowledge amongst the population of the public transport 'offer' including routes, reduced or concessionary fares and time savings. Triggers for this trend include growth in the urban population especially university students at one end of the age group and concessionary fares at the other. Other factors are improvements in public transport including faster, improved design, better customer service (of course with some exceptions) and not to be underestimated the influence of changing consumer values. In addition the numerous policy initiatives (both 'push' and 'pull') by Government and local authorities to encourage sustainable travel have had a positive effect. The result is that even when households have access to a car, other modes may be preferred although as the results in the full report show this varies between different demographic groups. This move away from unimodal to varimodal patterns of travel is significant and has knock on effects such as downsizing from two cars to one car per household.



Chart 44 Change of travel mode in the last two years



9.2.2 The second and related change in attitude is that the concept of 'main mode' of travel choice for a particular trip is increasingly inappropriate. The trend is to split journeys into stages using different modes – for example cycle/walk/train or car/coach. Yet official travel statistics and policy perspectives would tend to define the trip via the 'main mode' as the greater distance and cost. But in terms of public perception, time or even pleasure may drive the choice 'palette'. The implication is that new sorts of information systems are needed to inform and influence such choices. Yet currently travel apps are designed to focus on the choice of one mode even though it is technically possible to combine separate information systems on a customised basis so there is a real business opportunity here to support this growing varimodal inclination.

9.2.3 But this narrative is not to imply that all demographic groups will exhibit the same level or direction of travel change. The detailed results show considerable differences by socio economic group, residential location and within migrant and ethnic communities. There are different scales of implication for transport modelling depending on the future sizes of these different population groups and this will be the focus of the final stage of the ITC research. As things stand the DfT's national traffic forecasts show growth in road traffic volumes in England by between 19 and 55% between 2010 and 2040, but this is accompanied by a welcome new scenario based methodology which implies the flexibility to address change and diversity between demographic groups¹⁵.

9.3 Young people

- 9.3.1** The vast majority of young people cite cost factors as the main reason why young people are driving less. But this is not the whole story since even those who did own cars often prefer to travel by public transport, walking or cycling (41% of all short trips and 27% of long trips). There is also a growing number of young people who say they don't ever want a car and this increases with age. Thus 15% of non-car owners aged 17-29 year olds don't want a car in the future compared to twice as many (32%) of non-car owners aged 30-42.
- 9.3.2** Much as to what happens will depend on wider policy decisions about the cost of housing and the location of development in the future but we can say with confidence that the current generation of 20 year olds and indeed also many in their 30s are unlikely to resort to the levels of car ownership or certainly car use of previous generations. Young people today have learnt about how to use the public transport system and now make travel choices based on a range of modes and models.

9.4 Older people

- 9.4.1** The overall finding from the research is that older people are receptive to change driven by the desire to retain their mobility. As with young people, older people are using a wider range of modes and are less likely to rely on cars even when they own one. This change is in part due to the availability of concessionary fares or free travel and many older people are choosing to move to places which provide good public transport links to safeguard their mobility should they or their partner be unable to drive. Others are planning ahead in other ways for this purpose and are in the market for all sorts of solutions involving new types of vehicle design and other accessibility enhancing options including the greater use of technology.

9.5 Commuters and business travellers

- 9.5.1** Commuting distances are growing driven by the need to access cheaper housing and other factors such as dual career families and school allocations. It might be assumed that this would lead to higher rates of home working since for many professional occupations the work place is enabling working at different times at home, in coffee bars, local hubs, in their cars, on public transport and whilst walking. These trends are increasingly enabled by technology. However, it seems there is a long way to go to fully support this trend including in relation to employer attitudes, fares structures, vehicle design, planning and housing policy.
- 9.5.2** Apart from commuting, there is also undoubtedly some travel substitution for business travel by methods such as video conferencing, Skype and so on but this does not seem to result in less travel overall – rather it leads to wider networking and there is still a strong desire for face to face meetings. The ability to work whilst travelling for business is a key explanation for modal choice with facilities on trains and planes much discussed. An interesting finding was a growing tendency to use cars as mobile offices on grounds of convenience and privacy and some ingenious adaptations such as fold down desks and other equipment were described.



9.6 Migrants

- 9.6.1** Both the country of origin and the planned length of stay in the UK affect car ownership rates. Other effects stem from migrants being disproportionately engaged in lower paid jobs, more likely to spend on air travel and also more likely to live in urban areas – often in cultural and country of origin clusters. These factors led to distinct travel with relatively low rates of car ownership and much higher rates of walking.
- 9.6.2** Nevertheless, some migrants needed a car (or often a van) for work and here there was a tendency to car share especially by East European migrants where the norm in their home countries was to insure the vehicle rather than the individual driver.

9.7 Black, Asian and ethnic minority groups

- 9.7.1** As with migrants, there are clear differences in attitudes and patterns of travel between ethnic groups with some having more in common with the white UK group than other BAME groups a factor related to both socio economic status and to a lesser extent specific cultures. The results show the Indian Sikh and Hindu communities as an example of high commitment to car ownership with 60% of this group judging a new car to be a priority compared to only 29% of Africans. In comparison, there is less inclination to cycle which some see as a sign of low status.
- 9.7.2** In addition, aspirations lead to plans to move away from the inner city but still to return for shopping, religious venues and to a lesser extent work. This results in a network of cross city or cross country routes – the latter often provided by specialist coach services.

9.8 Overall

- 9.8.1** The research has shown major differences in travel between the groups studied although with urban/suburban/rural and socio economic differences frequently proving the most influential variable. As the proportion of the total population living in urban areas increases, both car ownership and car use is bound to decline.
- 9.8.2** Some groups are exhibiting bigger changes in attitude to car ownership than others especially young people but all groups are acquiring knowledge of public transport systems and are increasingly unlikely to see car as the automatic default choice. This in turn is breaking the link between car use and car ownership and reducing the status of cars as statement consumer goods.
- 9.8.3** Technology is enabling more diverse work travel patterns and affecting both commuting and business travel. A reduction in either commuting or business travel through working at home does not automatically lead to a reduction in total travel since many people still make trips for other purposes during the time gained.
- 9.8.4** The cumulative picture to emerge from the results of this 'On the Move' research is very convincing in terms of showing public support for moving towards more sustainable patterns of travel. This is not indicative of less travel and indeed with population growth and personal motivations¹⁶ there will be more demand. Rather the results give a strong indication of trends towards a wider range of modal choices and lower rates of trip per person by car¹⁷ as well as more variation of times and patterns of travel. This overarching finding has important implications for the National Transport Model as well as wider implications for economic growth and environmental policies. It is also to be welcomed that the new DfT road traffic forecasts presented via a range of scenarios will be a useful tool for the discussion.
- 9.8.5** These changes will continue and indeed are being observed in other developed economies and the good news from the research is that there are many opportunities for policy initiatives and technological development to facilitate this direction which the public will expect and support. A key role for Government is to support these trends including by tackling the legislative and policy obstacles and resisting unrepresentative pressure from lobby groups.
- 9.8.6** Overall, the ITC hopes that there will now be a debate about what should be done to ensure that the UK takes a lead to capture the implicit technological, environmental and economic opportunities stemming from this research.

¹⁶ This motivation is supported another of the ITC's research projects which addresses the broader question of "Why Travel?" from the perspective of different academic and philosophical disciplines www.whytravel.org

¹⁷ As even Jeremy Clarkson has written "Today's generation sees the car ... in a jam, on a wet Tuesday --- with a broken TomTom on the passenger seat. (Sunday Times: Driving, 17th May 2015 p. 9)



Appendices

Appendices covering the following information will be published online by the sponsors:

Appendix A Interview and Questionnaire Schedules

Appendix B Data and Literature Review

Appendix C Discussion Group Summaries

Appendix D Statistical Results

These can be viewed online at www.theitc.org.uk

Research Team profile

Social Research Associates (led by Kris Beuret OBE) is a social enterprise organisation specialising in research and consultancy about social aspects of planning, social policy and transport. The company places particular emphasis on the understanding of attitudes and perceptions that can be as influential on behaviour as 'objective reality'. This approach has been used to help develop policy in areas as diverse as health, childcare, road safety, crime and housing policy. SRA also carry out socio-economic analysis, training, equality audits and policy evaluation.

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