

Our Changing Travel

Research into how people's travel choices are
changing, November 2022

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April 2023



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1 Executive Summary

The Department for Transport (DfT) commissioned Ipsos UK to conduct a programme of research into public attitudes, travel needs and behaviours regarding travel following the pandemic and in response to other challenges, such as the rising cost of living and climate change. It addressed four main research questions:

1. How and why are people changing how they travel?
2. What are people's plans in relation to working from home and what could this mean for travel patterns?
3. Why are/aren't people returning to public transport?
4. What are people's attitudes and behaviours relating to sustainable travel?

The research involved an online survey of a representative sample of 2,345 adults aged 16-75 across England, drawn from the Ipsos online panel. Ipsos conducted 10 online focus group discussions in November 2022 to supplement the survey findings and 15 in-depth interviews to follow-up and explore key topics in February 2023.

The research builds on previous studies including the *All change?* programme of research¹ conducted during 2020-22. Throughout the report comparisons have been made between the following survey waves and time periods:

Survey wave	Time period and topics covered	Pandemic restrictions - context
<i>All change? Wave 1</i> Fieldwork in May-June 2020	January-March 2020 Recall data on frequency of travel by different modes	No restrictions in place during the three months before the pandemic
<i>All change? Wave 6</i> Fieldwork in November 2021	November 2021 Frequency of travel by different modes and reasons for travel including travel to work frequency	A period following the lifting of all legal limits to social contact; there was media coverage of rising case numbers and what became known as the Omicron variant towards the end of fieldwork
<i>All change? Wave 6</i> Fieldwork in November 2021	January-March 2020 Recall data on reasons for travel including travel to work frequency. Note: this data was not collected in <i>All change? Wave 1</i>	No restrictions in place during the three months before the pandemic

¹ <https://www.gov.uk/government/publications/covid-19-travel-behaviour-during-the-lockdown>

<p>Our Changing Travel</p> <p>Fieldwork in November 2022</p>	<p>November 2022</p> <p>Frequency of travel by different modes and reasons for travel including travel to work frequency</p> <p>Wider attitudes and behaviours including barriers to using public transport, travel and the rising cost of living, sustainability</p>	<p>No restrictions in place – legal requirement to self-isolate removed in February 2022</p>
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Notes on the findings

Throughout the report, data from November 2022 and November 2021 have been compared against reports (collected in May-June 2020 and in November 2021) of behaviour in the three months before the pandemic period (January-March 2020). These comparisons are indicative and caution should be applied when interpreting them because the time periods for questions are not always directly comparable. In particular:

- Findings from the pre-pandemic period covered a three-month reference period (between 1st January and 23rd March 2020) whereas findings from November 2022 and November 2021 covered four-week reference periods.
- Reliability of findings for the pre-pandemic period may be subject to recall bias given the time that elapsed between fieldwork (in May-June 2020 and in November 2021) and the reference period.
- Seasonality is likely to impact travel behaviour which may affect the comparability of findings about people's travel behaviour in winter (January-March 2020) and autumn (November 2022 and November 2021).

Statistical tests have been applied to the survey data to indicate which differences between survey waves and between sub-groups (e.g., age groups) are statistically significant, based on a 95% confidence interval. All differences mentioned in this document are statistically significant unless otherwise stated.

The qualitative insights presented in this report are intended to demonstrate the views and experiences of the participants recruited, who were not a statistically representative sample of the wider population.

1.1 Transport modes

The extent of change in people's travel choices in November 2022 compared with the pre-pandemic period (January-March 2020) varied according to mode:

- The proportions travelling by public transport had fallen: 48% travelled by **bus**, 43% by **train** and 29% by **underground/metro** in November 2022 compared with 63% by bus, 63% by train and 44% by underground / metro in the pre-pandemic period.
- The proportions **walking** (68%) and **cycling** (26%) in November 2022 remained a little below the levels reported for the pre-pandemic period (79% and 31%).

- However, the proportions who travelled by **car as driver** (71%) and by **car as a passenger** (77%) in November 2022 were similar to those in the three months before the pandemic (71% and 80%).

One in five people (21%) used **informal car-pooling** (where individuals who know each other share a journey together via a similar route) in November 2022, an increase from 15% pre-pandemic. Informal car-pooling was more prevalent among those most impacted by the increase in the cost of living and the depth interviews found that cost-saving was an important motivation for use.

1.2 Types of journeys

A similar proportion of employed people travelled to a place of work at least once a week in November 2022 (78%) as immediately before the pandemic (January-March 2020) (82%). However, the frequency of travelling to work had fallen: 32% of employed people travelled to a place of work five days a week or more often in November 2022 compared with 47% immediately before the pandemic.

The depth interviews found participants had settled into new working and commuting patterns with little motivation to increase how frequently they travelled to workplaces due to increased flexibility, reduced commuting time and costs, and improved work-life balance.

1.3 Barriers to using public transport

In November 2022, just under a third of people (30%) said they avoided public transport due to concerns around Coronavirus, a proportion which had fallen since November 2021 (46%). Focus group discussions highlighted the importance people placed on adequate ventilation and cleanliness.

When respondents in November 2022 were asked what would encourage them to use public transport more, financial incentives were most commonly mentioned, along with more frequent and punctual services, whilst issues related to Coronavirus (ventilation, low numbers of Coronavirus cases) were mentioned less.

A third of people (33%) agreed they found it difficult to choose the most suitable ticket when travelling on public transport. Focus group participants suggested that clearer and more visible information about current ticketing options was needed.²

1.4 Travel and the rising cost of living

In November 2022, just over a third of people in England (35%) said they were finding it 'difficult' or 'very difficult' to cope financially on their household's income. This group of people

² The survey and focus groups took place before the introduction of the £2 cap on 1st January 2023 for most bus fares in England outside London

were more likely to report having made changes to their travel behaviours in the three months leading up to this point.

Those most significantly impacted by the increase in the cost of living were younger adults aged 16-34-years-old, people from ethnic minority backgrounds, parents, those in lower income households and those with a mental or physical health condition.

People's most reported way of saving money on transport and travel was walking more: this was reported by 57% of people. Additionally, just under half (46%) said they had reduced the number of trips/non-essential journeys they were making.

Focus group and interview participants described taking a more conscious approach to the decisions they made about travelling, including considering and planning whether and how to make journeys. Those with greater reliance on public transport tended to think they had fewer opportunities to make alterations to how they travelled compared to car owners.

1.5 Sustainability

The prospect of reducing their contribution to climate change motivated a significant proportion of people to say they would travel sustainably. Just over half (53%) said they would be willing to walk or cycle more and four in ten (42%) said they were willing to use cars less. However, there was a reduction in the proportion of people willing to take some actions to improve sustainability including reducing flights (37% in November 2022 compared to 42% in November 2021) and increasing active travel (53% in November 2022 compared to 57% in November 2021).

While focus group participants said that they hear more about the environment than they used to, there was a sense that this had not had any significant impact on their thinking or behaviour in respect of travelling. The feeling was that there would be little or no change in people's behaviour until travelling in a more sustainable way becomes cheaper than current options.

1.6 Remainder of this report

The remainder of this report is structured in line with the headings above. Summary boxes have been included at the start of each chapter to present key findings and trends.

2 How did people travel?

- The extent of change in people’s travel choices in November 2022 compared with the pre-pandemic period (January-March 2020) varied according to mode:
 - The proportions travelling by public transport has fallen: 48% travelled by **bus**, 43% by **train** and 29% by **underground/metro** in November 2022 compared with 63% by bus, 63% by train and 44% by underground/metro in the pre-pandemic period (see **section 2.3**).
 - The proportions **walking** (68%) and **cycling** (26%) in November 2022 remained a little below the levels reported for the pre-pandemic period (79% and 31%) (see **section 2.2**).
 - However, the proportions who travelled by **car as driver** (71%) and by **car as a passenger** (77%) in November 2022 were similar to those in the three months before the pandemic (71% and 80%) (see **section 2.1**).
- One in five people (21%) used **informal car-pooling** in November 2022, an increase from 15% pre-pandemic. Informal car-pooling was more prevalent among those most impacted by the increase in the cost of living and the depth interviews found that cost-saving was an important motivation for use (see **section 2.4**).

This chapter describes the frequency people used transport modes during three time-points:

- Pre-pandemic - reported behaviour (collected in May-June 2020) in the three months before the pandemic period (January-March 2020).
- November 2021 - several months after the lifting of all legal restrictions to social contact (there was also some media coverage of rising case numbers and the Omicron variant).
- November 2022 - a period when no restrictions were in place.

The chapter focuses on mode ‘use’ (the proportion of people using a mode at least once) and ‘*frequent use*’ (the proportion using a mode at least once a week) during the three time-points.

Comparisons between the three time-points are indicative and caution should be applied when interpreting the findings because the time periods for questions are not always directly comparable. In particular:

- Findings from the pre-pandemic period covered a three-month reference period (between 1st January and 23rd March 2020) whereas findings from November 2022 and November 2021 covered four-week reference periods.
- Reliability of findings for the pre-pandemic period may be subject to recall bias given the time that elapsed between fieldwork (in May-June 2020) and the reference period.

- Seasonality is likely to impact travel behaviour which may affect the comparability of findings about people's travel behaviour in Winter (January-March 2020) and Autumn (November 2022 and November 2021).

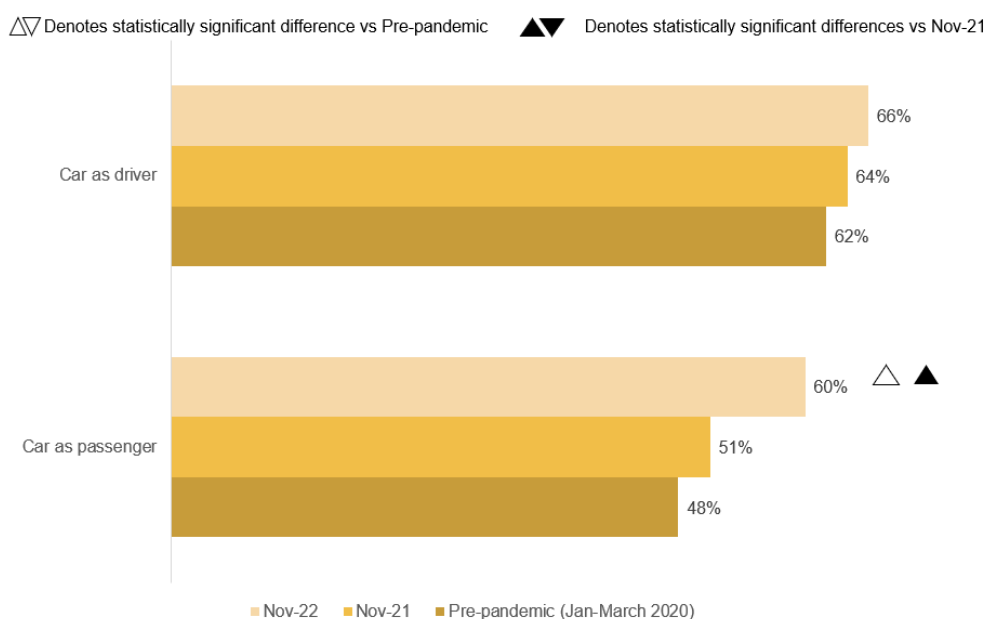
2.1 How did the frequency of travelling by car change?

The proportion of people who travelled at least once by car as a driver increased significantly between November 2021 and November 2022 and is now in line with pre-pandemic levels. Seven in ten (71%) people travelled by car as a driver at least once in November 2022, up three percentage points from 68% November 2021 and in line with pre-pandemic levels (71%).

There was an even larger increase in the proportion of people who travelled by car as a passenger between November 2021 and November 2022, but this remained below the pre-pandemic level. Over three-quarters (77%) travelled this way at least once in November 2022, which is an increase of seven percentage points from 70% in November 2021 but below the 80% who travelled this way pre-pandemic.

Figure 2.1 shows trends in *frequent* usage (at least weekly) of car as a driver and as a passenger between November 2022, November 2021 and the pre-pandemic period. Two-thirds (66%) of people travelled at least once a week as a car driver in November 2022, which showed little change compared with November 2021 (64%) and the pre-pandemic period (62%). In contrast, the proportion who travelled at least once a week by car as a passenger had risen significantly to six in ten (60%) in November 2022 from 51% in November 2021 and 48% in the pre-pandemic period. So, the proportion of people travelling frequently by car as a passenger was higher than before the pandemic, even though the total proportion travelling in this way had not quite returned to pre-pandemic levels.

Figure 2.1: Trend for frequent travel by car as a driver/passenger (at least once a week)



Source: Ipsos /DfT, Base: pre-pandemic: 2,184 adults in England, November 2021: 2,271 adults in England, November 2022: 2,345 adults in England

January-March 2020 recall from Wave 1 survey. Fieldwork conducted 15th May-22nd May 2020

Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport? It does not matter how long the journey was, or why you made it. – Car as driver, Car as passenger

Q7. Now thinking back to the period immediately before the 'lockdown', that is the period between 1st January 2020 and 23rd March, how often, if at all, would you say you personally travelled by the following modes of transport? It does not matter how long the journeys were, or why you made them – Car as driver, Car as passenger

In line with the period before the pandemic, older age groups and people living in rural areas were significantly more likely than other groups to have travelled *frequently* (at least once a week) by car as a driver in November 2022. At least seven in ten had done this; 72% of 55-75-year-olds, and 75% of those in rural areas compared to 66% overall. The proportion of men travelling frequently by car as a driver had increased significantly from 63% before the pandemic to 71% in November 2022.

As was the case pre-pandemic, younger age groups and women were significantly more likely to have travelled *frequently* (at least once a week) by car as a passenger in November 2022; 72% of those aged 16-34 and 67% of women compared to 60% overall.

2.2 How did active travel change?

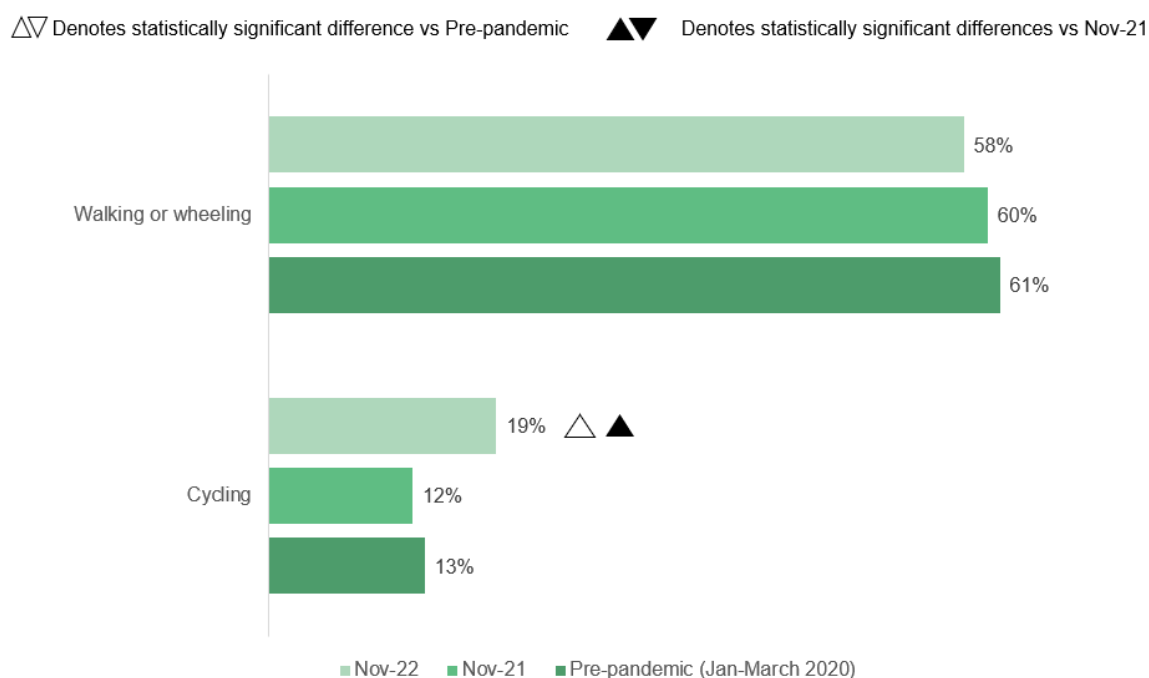
Walking or wheeling (by a wheelchair or motorised scooter), all the way to a destination at least once in November 2022 remained in line with November 2021, and below the level reported immediately before the pandemic. Walking or wheeling to a destination was something 68% of people did at least once in November 2022 compared to 69% in November 2021 and 79% before the pandemic.

A quarter of people (26%) cycled at least once during November 2022, an increase from 17% in November 2021 but lower than the 31% before the pandemic.

As shown in Figure 2.2, people walked or wheeled to a destination *frequently* to the same extent in November 2022 as in November 2021 and during the period immediately before the pandemic. Six in ten (58%) walked or wheeled to a destination at least once a week in November 2022, in line with the 60% reported in November 2021 and the 61% before the pandemic. In November 2022, younger age groups and men were significantly more likely to have travelled this way *frequently*; 63% of 16-34-year-olds and 61% of men compared to 58% of people overall. By comparison, both groups were no more likely to have travelled *frequently* by this mode before the pandemic.

There were more significant changes in terms of *frequent* cycling. In November 2022, 19% of people cycled at least once a week which was significantly higher than the proportions doing this in November 2021 (12%) and in the period immediately before the pandemic (13%).

Figure 2.2: Trend for *frequent* travel by walking/wheeling, cycling (at least once a week)



Source: Ipsos /DfT, Base: pre-pandemic: 2,184 adults in England, November 2021: 2,271 adults in England, November 2022: 2,345 adults in England

January-March 2020 recall from Wave 1 survey. Fieldwork conducted 15th May-22nd May 2020

Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport? It does not matter how long the journey was, or why you made it. – Walking all the way to a destination or wheeling by a wheelchair or motorised scooter, Cycling (including e-bike)

Q7. Now thinking back to the period immediately before the 'lockdown', that is the period between 1st January 2020 and 23rd March, how often, if at all, would you say you personally travelled by the following modes of transport? It does not matter how long the journeys were, or why you made them – Walking all the way to a destination or wheeling by a wheelchair or motorised scooter, Cycling (including e-bike)

In line with the pre-pandemic period, those aged 16-34-years-old and men were significantly more likely than other groups to have cycled at least once a week in November 2022; 30% of those aged 16-34 and 26% of men compared to 19% of people overall. The proportion of people in London cycling frequently increased significantly from 15% before the pandemic to 27% in November 2022.

More than four in ten people (45%) said they had walked or wheeled or cycled for essential journeys (defined to respondents as 'e.g. work, shopping'), at least once during November 2022. The proportion who travelled this way was significantly higher among those aged 16-34 (50%) and people living in London (55%).

In line with the pre-pandemic period, public transport users were also significantly more likely than others to have walked or wheeled or cycled frequently in November 2022. For example, 67% of those who used any form of public transport in November 2022 and 71% of *frequent* public transport users (who used public transport at least once a week in November 2022) had walked or wheeled all the way to a destination at least once a week in November 2022. A third

of *frequent* public transport users, 32%, cycled at least once during November 2022 compared to 26% overall.

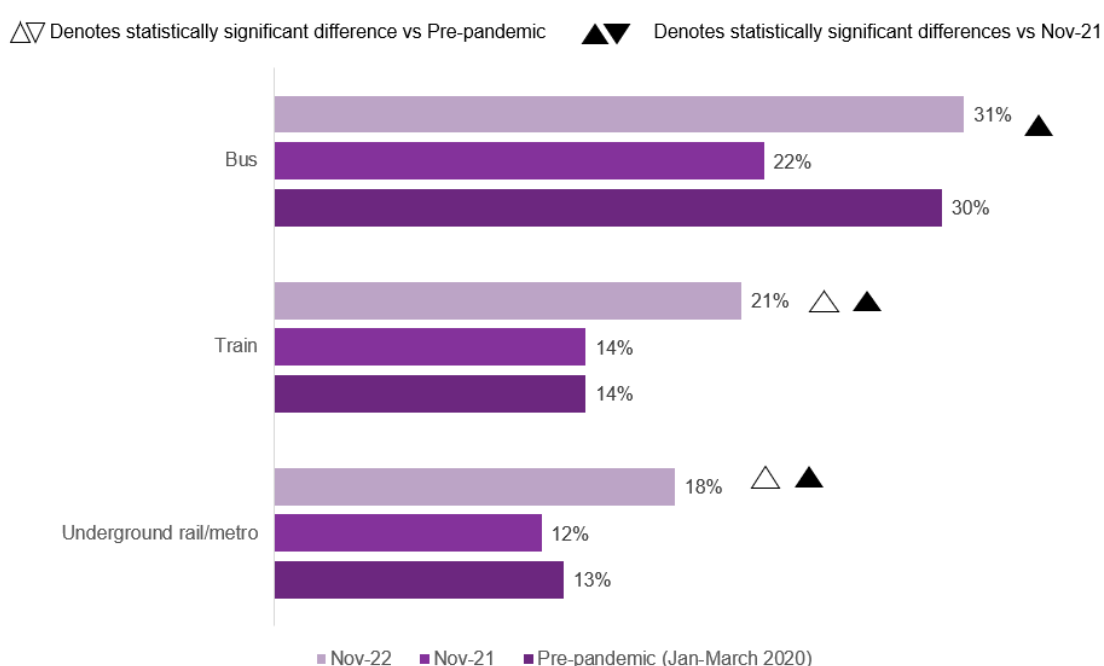
2.3 How did use of public transport change?

The proportions of people who travelled at least monthly by bus, train or underground/metro services increased significantly between November 2021 and November 2022 but remained below pre-pandemic levels. Nearly half (48%) used a bus at least once in November 2022, an increase from 39% in November 2021 but lower than the period immediately before the pandemic (63%). Train usage was higher in November 2022 (43%) compared to November 2021 (33%) but lower than before the pandemic (63%). Usage of underground/metro services was also higher in November 2022 (29%) than in November 2021 (33%) but lower than pre-pandemic (44%).

As shown in Figure 2.3, the proportions of people who travelled *frequently* (at least weekly) on the three public transport modes was higher in November 2022 than in November 2021, and for trains and underground/metro services higher than before the pandemic; *frequent* bus usage remained in-line with pre-pandemic levels.

Between November 2021 and November 2022, there was a seven-percentage point increase in the proportion who travelled *frequently* by train - from 14% to 21% - reaching a level higher than it was immediately before the pandemic (when it was 14%). *Frequent* travel by underground/metro services also increased significantly from 12% in November 2021 to 18% in November 2022, higher than it had been pre-pandemic (13%). The proportion of people who travelled by bus at least once a week increased from 22% to 31% which was in-line with pre-pandemic levels of 30%.

Figure 2.3: Trend for *frequent* travel by bus, train, underground/metro (at least once a week)



Source: Ipsos/DfT, Base: pre-pandemic: 2,184, November 2021: 2,271, November 2022: 2,345
January-March 2020 recall from Wave 1 survey. Fieldwork conducted 15th May-22nd May 2020

Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport? It does not matter how long the journey was, or why you made it – Bus, train, underground/metro

Q7. Now thinking back to the period immediately before the 'lockdown', that is the period between 1st January 2020 and 23rd March, how often, if at all, would you say you personally travelled by the following modes of transport? It does not matter how long the journeys were, or why you made them – Bus, train, underground/metro

In line with the pre-pandemic period, younger age groups, those from ethnic minority backgrounds and those living in London were significantly more likely to have travelled *frequently* by train in November 2022. Just under four in ten of those aged 16-34 (38%) and those from ethnic minority backgrounds (37%) travelled at least weekly by train in November 2022, compared to 21% overall. The proportion was even higher amongst those living in London (47%).

The groups who were significantly more likely than average to have travelled *frequently* by train were also significantly more likely to have travelled *frequently* by bus. Approaching half, 46%, of 16-34-year-olds travelled by bus at least once a week, compared to 31% overall. Travelling this frequently by bus was even more prevalent among those from ethnic minority backgrounds, 54%, and those living in London, 60%. The same groups were also significantly more likely to have travelled frequently by bus before the pandemic.

There was considerable geographical variation in *frequent* travel by underground/metro services. Just over half, 53% of people living in London had done this, compared to only 12% in the North of England and compared to 18% overall.

Those who had fallen behind on at least one payment in the last 12 months were significantly more likely to have travelled *frequently* by public transport modes in November 2022. For example, a higher proportion travelled *frequently* by bus - 53% compared to 31% overall - and by train - 42% compared to 21% overall. Four in ten (39%) of this group travelled *frequently* by underground/metro compared to 18% overall.

2.4 How did use of car-pooling and taxis change?

Two-fifths of people (21%) used informal car-pooling (which is where individuals that know each other share a journey together via a similar route) at least once in November 2022, an increase compared to November 2021 (12%) and the pre-pandemic period (15%).

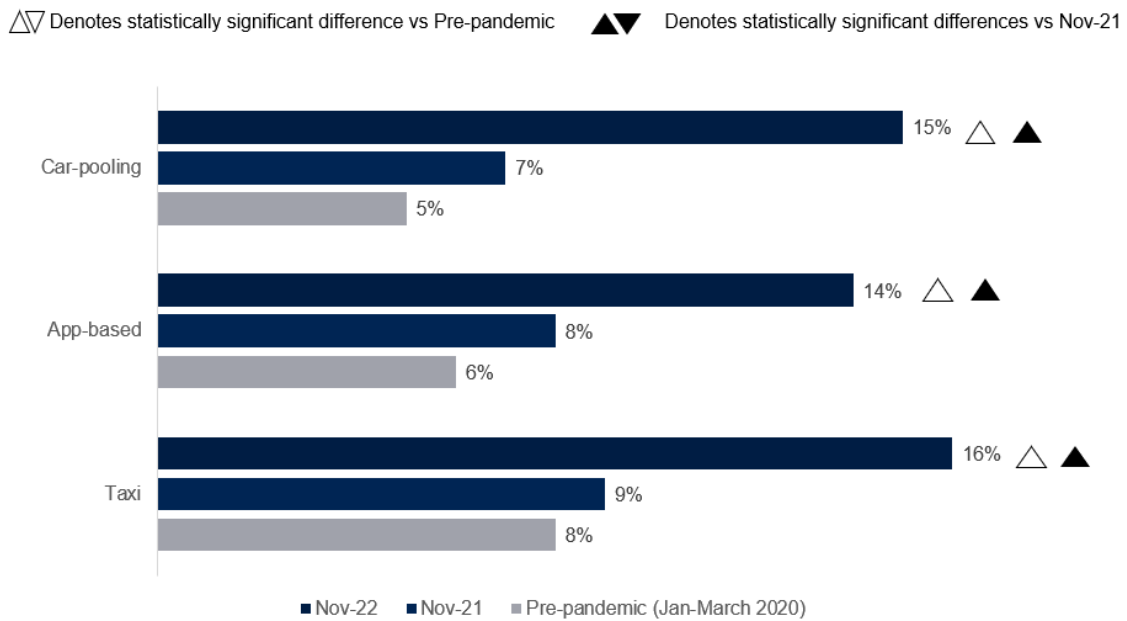
In November 2022, the proportion using taxis (33%) at least monthly increased compared to November 2021 (22%) but remained below pre-pandemic levels (46%).

Over a quarter of people (27%) used app-based minicab services such as Uber at least monthly in November 2022, an increase from November 2021 (18%) and in line with the period before the pandemic (27%).

As shown in Figure 2.4, there was a significant increase in the *frequent* (at least weekly) use of informal car-pooling, taxi and app-based mini-cab services in November 2022 compared to November 2021 and the period immediately before the pandemic.

- *Frequent* use of informal car-pooling was higher in November 2022 (15%) than in November 2021 (7%) and immediately before the pandemic (5%).
- *Frequent* travel by taxi was higher in November 2022 (16%) than in November 2021 (9%) and immediately before the pandemic (8%).
- Similarly, *frequent* travel by app-based minicabs was higher in November 2022 (14%) than in November 2021 (8%) and before the pandemic (6%).

Figure 2.4: Trend for frequent informal car-pooling, travelling by taxi, app-based minicab (at least once a week)



Source: Ipsos/DfT, Base: pre-pandemic: 2,184 adults in England, November 2021: 2,271 adults in England, November 2022: 2,345 adults in England

January-March 2020 recall from Wave 1 survey. Fieldwork conducted 15th May-22nd May 2020

Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport? It does not matter how long the journey was, or why you made it. – Informal car-pooling (e.g. individuals that know each other and share a similar journey route), App-based minicab services e.g. Uber, Taxi/black cab/minicab/private hire

Q7. Now thinking back to the period immediately before the 'lockdown', that is the period between 1st January 2020 and 23rd March, how often, if at all, would you say you personally travelled by the following modes of transport? It does not matter how long the journeys were, or why you made them – Informal car-pooling (e.g. individuals that know each other and share a similar journey route), App-based minicab services e.g. Uber, Taxi/black cab/minicab/private hire

In line with the pre-pandemic period, *frequent* users of informal car-pooling were concentrated among younger age groups with 31% of those aged 16-34 using informal car-pooling at least once a week in November 2022. Around three in ten parents, 31%, used informal car-pooling in November 2022 at least once a week, compared to 15% overall. Those living in London were significantly more likely to be *frequent* users of informal car-pooling in November 2022 with 23% using this transport mode weekly. This had not been the case before the pandemic, in which 6% used informal car-pooling *frequently*, compared to 5% overall.

Frequent use of informal car-pooling was also more prevalent among those most impacted by the increase in the cost of living. For example, four in ten (40%) of those who had fallen behind on at least one payment in the past 12 months and two in ten (22%) finding it difficult to cope on their current income, used informal car-pooling at least once a week in November 2022.

Consistent with the pre-pandemic period, groups that were more likely to have used taxis and app-based minicabs *frequently* in November 2022 mirrored those who were more likely to use informal car-pooling *frequently*. A third of 16-34-year-olds used one of these modes at least once a week - 33% travelled by taxi and 32% by app-based mini cabs - compared to 14% and 16% overall. Just under a quarter (23%) of those living in London used a taxi *frequently* and 28% had used an app-based minicab this often.

Those from ethnic minority backgrounds were significantly more likely than people overall to have used a taxi or app-based minicab *frequently* both pre-pandemic and in November 2022. Just over a quarter of those from ethnic minority backgrounds (27%) travelled by taxi and 28% by app-based minicab at least once a week.

In November 2022, those who had fallen behind on at least one payment in the past 12 months and parents were also significantly more likely to have used these modes *frequently*, 38% travelled by taxi and 40% by app-based minicab at least once a week. Three in ten parents used these modes at least once a week - 30% travelled by taxi and 28% by app-based minicab compared to 16% and 14% overall.

2.5 Why was there an increase in car-pooling?

Given the increase in informal car-pooling identified by the survey, five of the fifteen depth interviews were used to explore the reasons for this. Interviews were conducted with participants who said they had done more informal car-pooling in the six months prior to their interview. Informal car-pooling was defined to participants as 'people from more than one household sharing a car journey with people who know each other and who share a similar journey route'.

The depth interviews found participants had used informal car-pooling for a range of different journey purposes, including commuting, school runs and shopping. Journeys tended to be local trips, however participants also said they had shared longer-distance journeys with someone outside of their household on a more ad hoc and less frequent basis when it was convenient for all to do so. Most typically, these longer-distance journeys involved visiting family or friends who lived in other parts of the country.

Participants had often started car-pooling informally by chance. For example, one participant explained how a work colleague had offered to drive them to work when their car was out of service, something which had then become part of their weekly routine. Another participant said they had noticed a neighbour at the local gym and had asked if they wanted to travel together, something which then resulted in them sharing journeys to and from gym classes twice a week.

Car-pooling enabled participants to reduce their fuel costs, often by alternating which person's car was driven or by sharing the cost of fuel where only one car was being used. Participants said that it was only practical to car-pool when other passengers could be picked up on the way rather than making a detour which would add to their journey length. Reflecting this, participants who did not car-pool said that this could be a barrier to making journeys with other people.

Car-poolers also said it was possible to make savings since only one car was being parked at a shared destination, meaning that the cost of parking could be shared. Where parking fees had been incurred, these had been split between those making the associated journey.

In addition to cost savings that had typically motivated participants to car-pool when presented with the opportunity to do so, depth interviews showed that it was often the case that further benefits were identified. The most significant of these was the social benefit of regularly engaging with another person outside their household. Participants acknowledged that the opportunity to have a conversation with those they shared regular journeys with had a positive impact on their sense of wellbeing. This was also often something which motivated participants to continue travelling in this way.

"It's like a little friendship has built that is just not at work."

*Participant who travelled by informal car-pooling
(depth interview)*

Participants also saw environmental benefits as a positive impact of car-pooling, even if this had not driven their change in behaviour in the first place.

"One week she drives, then the other week I do. I said if you fancy going together, it will save us taking two cars. Two cars are bad for (the) environment, essentially going there to park next to each."

*Participant who travelled by informal car-pooling
(depth interview)*

When participants were asked about formal car-pooling - defined as 'opportunities to car-pool offered by local organisations, apps or community schemes' - they tended to have low awareness of such opportunities. They also had safety concerns about using such schemes, and described feeling less comfortable with the idea of sharing car journeys with people they did not know. They were also keen to understand the driver's competency before sharing a journey with them, particularly where journeys required driving on roads with higher speed limits such as motorways.

These safety factors, along with the potential need to add extra detours making journeys inconvenient, meant that participants tended to feel it was unlikely that they would consider using formal car-pooling opportunities even where costs could be saved.

“For me personally, I wouldn’t feel comfortable travelling with people I don’t know, even if it makes journey a bit easier. I’d prefer to be with people I know.”

*Participant who travelled by informal car-pooling
(depth interview)*

2.6 How did expected usage of travel modes during January-March 2023 compare to pre-pandemic?

Survey respondents in November 2022 were asked how frequently they had used each transport mode in November 2022 and then how often they thought they would use them to travel during the first few months of 2023 (defined to respondents as ‘between January and March 2023’).

Table 2.1 shows the proportion of people who used each mode at least once during November 2022, the proportion who said they would use these modes at least once between January and March 2023 and the proportion reporting they used each mode at least once during the pre-pandemic period (January-March 2020, collected in the *All Change? Wave 1* survey in May-June 2020).

The proportion of people expecting to travel by car as passenger and car as driver between January to March 2023 was significantly above the proportions who reported doing so pre-pandemic. Eight in ten people (84%) expected to travel by car as passenger in January to March 2023 compared to 80% who reported travelling by this mode in the three-month pre-pandemic period. Three-quarters (75%) expected to travel by car as driver between January and March 2023 compared to seven in ten (71%) who had travelled by this mode before the pandemic.

Seven in ten (72%) expected to walk or wheel to a destination between January and March 2023, compared to eight in ten (79%) who had travelled this way before the pandemic. A third (33%) expected to cycle between January and March 2023 compared to 31% before the pandemic.

While 59% of people expected to travel by train between January to March 2023, this was lower than the 64% before the pandemic. By contrast, levels of expected use of bus and underground/metro services were in line with the period before the pandemic. Six in ten people (61%) expected to travel by bus between January and March 2023 compared to 63% before the pandemic. Four in ten (41%) expected to travel by underground/metro services between January to March 2023 and 43% used these services before the pandemic.

Expected use of taxis (46%) between January and March 2023 was significantly behind use before the pandemic (49%). However, expected use of app-based mini-cabs was significantly higher; 34% compared to 29% pre-pandemic. This was also the case for informal car-pooling - a quarter (25%) of people expected to use this mode of travel in January to March 2023 compared to just 15% before the pandemic.

Table 2.1: Comparison of use of modes at least once in November 2022 vs. expected use at least once a month during January-March 2023

(* denotes statistically significant difference between expected usage and pre-pandemic)

	% used at least once pre-pandemic i.e. Jan.- March 2020 (3-month period)	% used at least once - Nov. 2022 (4-week period)	% expected to use at least once Jan.- March 2023 (3-month period)
Car as a passenger	80	77	84*
Car as a driver	71	71	75*
Walking or wheeling (wheelchair/motorised scooter)	79	68	72*
Bus	63	48	61
Train	64	43	59*
Taxi	49	33	46*
Underground rail/metro	43	29	41
App-based minicab services e.g. Uber	29	27	34*
Cycling	31	26	33
Informal car-pooling	15	21	25*

Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022

January-March 2020 recall from Wave 1 survey. Fieldwork conducted 15th May-22nd May 2020

Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport? It does not matter how long the journey was, or why you made it.

Q15. Still thinking about the first few months of next year, that is January-March 2023. How often, if at all, do you think you will travel using these modes during that time?

Q7. Now thinking back to the period immediately before the 'lockdown', that is the period between 1st January 2020 and 23rd March, how often, if at all, would you say you personally travelled by the following modes of transport? It does not matter how long the journeys were, or why you made them

3 Journeys and modes

- A similar proportion of employed people travelled to a place of work at least once a week in November 2022 (78%) as before the pandemic (82%). However, the frequency of travelling to work had fallen: 32% of employed people travelled to a place of work five days a week or more often in November 2022 compared with 47% immediately before the pandemic (see **section 3.3**).
- When respondents in November 2022 were asked how often they expected to travel to a place of work in the first few months of 2023, they said that they would do this about as frequently as at present. For example, the proportions of employed people who said they expected to travel to work at least once a week (75%) and at least five days a week (30%) in the first few months of 2023 were similar to the proportions who said they did this at present (in November 2022) – 78% and 32% respectively.
- The depth interviews found participants had settled into new working and commuting patterns with little motivation to increase how frequently they travelled to workplaces due to increased flexibility, reduced commuting time and costs, and improved work-life balance (see **section 3.3**).

This chapter explores the reasons why people made journeys in November 2022, November 2021 and in the three-month period before immediately before the Coronavirus pandemic. It also focuses on patterns in working from home and commuting in November 2022, describing how these have changed compared to behaviours in November 2021 and before the pandemic.

Throughout the chapter findings have been presented for the following time-points:

- Pre-pandemic - reported behaviour (collected in November 2021) in the three months before the pandemic period (January-March 2020).
- November 2021 - several months after the lifting of all legal restrictions to social contact (there was also some media coverage of rising case numbers and the Omicron variant).
- November 2022 - a period when no restrictions were in place.

Comparisons between the three time-points are indicative and caution should be applied when interpreting the findings because the time periods for questions are not always directly comparable. In particular:

- Findings from the pre-pandemic period covered a three-month reference period (between 1st January and 23rd March 2020) whereas findings from November 2022 and November 2021 covered four-week reference periods.

- Reliability of findings for the pre-pandemic period may be subject to recall bias given the time that elapsed between fieldwork (in November 2021) and the reference period.
- Seasonality is likely to impact travel behaviour which may affect the comparability of findings about people's travel behaviour in Winter (January-March 2020) and Autumn (November 2022 and November 2021).

3.1 Range of different types of journeys

As Table 3.1 shows, on average, people reported making journeys for 4.9 different reasons in November 2022, for 4.8 different reasons in in November 2021 and for 6.0 different reasons in the three-month period immediately before the pandemic.

It should be noted that the findings from November 2022 and November 2021 covered four-week reference periods, whereas the pre-pandemic period covered a three-month reference period. Therefore, it is to be expected that the incidence of reporting of different journey types would be lower for November 2022 and November 2021 than for the pre-pandemic period.

Table 3.1: Average number of reasons for travelling – pre-pandemic, November 2021, November 2022

Period	Average no. of reasons
Pre-pandemic period (January-March 2020)	6.0
November 2021	4.8
November 2022	4.9

Source: Ipsos/DfT, Base: 2,327 adults in England who made a journey in the past 4 weeks by each transport mode. November 2021 and January-March 2020 recall sourced from November 2021 survey (base: 2,267).

Respondents were shown a list of 17 reasons in both the November 2021 and November 2022 surveys.Q2A. Still thinking again about the last 4 weeks, for which of these reasons, if any, have you made a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.

QW62CNew: Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, for which of these reasons, if any, did you make a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.

In November 2022, the average number of different reasons why people travelled was significantly higher for those aged 35-45; 5.2 reasons compared to 4.9 overall. It was higher among women, 5.1 reasons, those in ABC1 households, 5.3, and among those living in higher income households with earnings of £45,000 and above, 5.7.

3.2 Reasons for travelling

Figure 3.1 shows the reasons people travelled in November 2022 and in the three-month period immediately before the pandemic (January-March 2020).

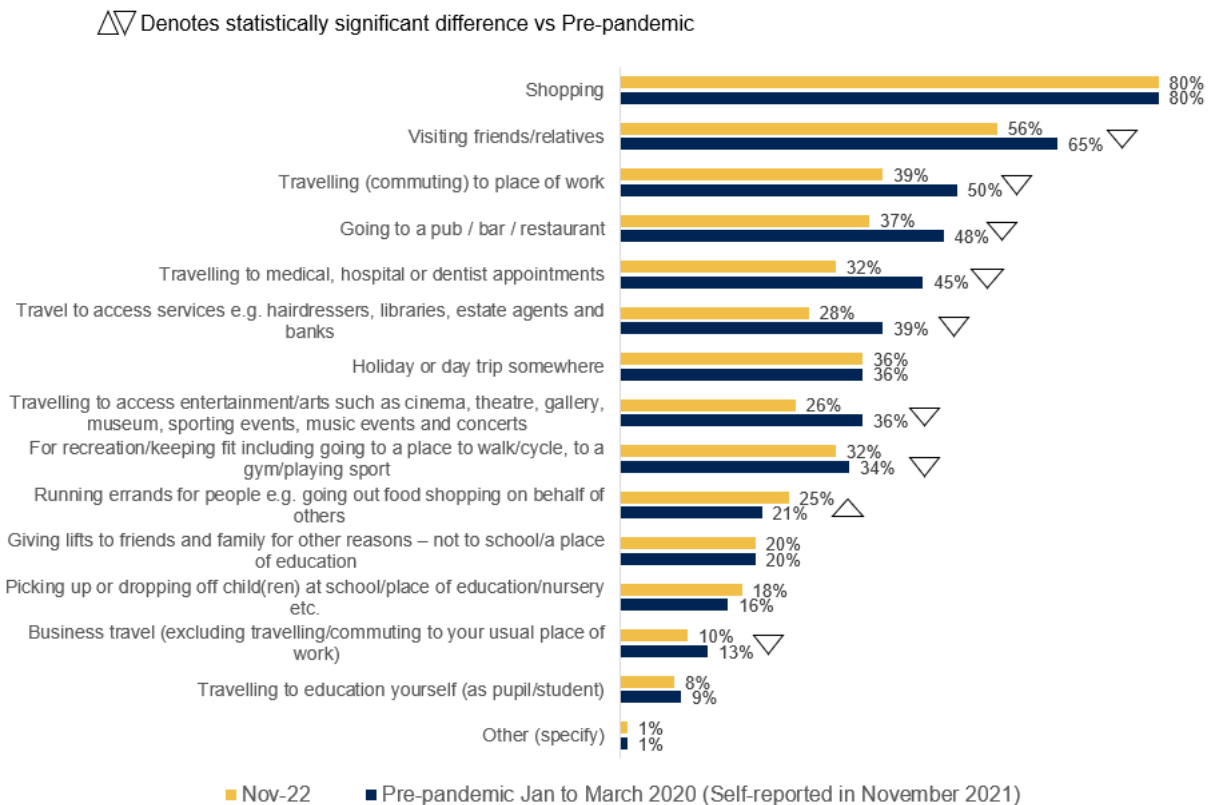
Shopping, visiting friends and relatives and travelling (commuting) to a place of work were the most common reasons for travel in November 2022 and in the pre-pandemic period.

In November 2022, eight in ten people (80%) travelled for shopping, just over half (56%) travelled to visit friends/relatives and nearly four in ten (39%) travelled to a place of work.

In the three-month pre-pandemic period, eight in ten people (80%) travelled for shopping, nearly two thirds (65%) travelled to visit friends/relatives and half (50%) travelled to a place of work.

As noted above the findings from November 2022 covered a four-week reference period, whereas the pre-pandemic period covered a three-month reference period. Therefore, it is to be expected that the incidence of reporting of different journey types would be lower for November 2022 than for the pre-pandemic period.

Figure 3.1: Reasons for travelling pre-pandemic compared to November 2022



Source: Ipsos/DfT; Base: 2,327 people in England who have made a journey in the past 4 weeks by each transport mode.

Data for January-March 2020 based on recall collected in November 2021 (Base: 2,271)

Q2A. Still thinking again about the last 4 weeks, for which of these reasons, if any, have you made a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.

QW62CNew: Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, for which of these reasons, if any, did you make a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.

Respondents were shown a list of 17 reasons in both the November 2021 and November 2022 surveys.

In line with the pre-pandemic period, those in social grade ABC1 households³ and higher income households with annual earnings of £45,000 and above, were significantly more likely to have travelled for recreational and leisure journeys during November 2022. For example, 41% of those from ABC1 households and 46% of those with a household income of £45,000 or more had made one or more journeys to a pub, bar or restaurant compared to 37% of people overall.

Around a third of those from ABC1 households, 34%, went on a day trip compared to 30% overall. The equivalent proportion was 38% among those with annual household earnings of £45,000 and above. Going out for recreation/keeping fit including visiting a gym/playing sport was also significantly more common among ABC1 households and those with earnings of £45,000 and above. This was done by 37% and 38% respectively, compared to 32% overall.

3.3 How did patterns in working from home change?

Respondents were asked how often they worked from home and travelled to a place of work in both the November 2022 and November 2021 surveys. In the November 2021 survey respondents were also asked about the period immediately before the pandemic.

Between the pre-pandemic period and November 2022, there was a significant increase in the proportion of people in employment who worked from home. As shown in Table 3.2, nearly half (46%) of employed people worked from home at least once a week in November 2022 compared to 28% during the pre-pandemic period of January-March 2020.

The proportion of people in employment who travelled to a place of work at least once a week in November 2022 (78%) was in-line with the pre-pandemic period (82%).

³ These classifications are based on the occupation of the Chief Income Earner in the household. Higher social grades include ABC1 grades (managers, professionals, administration/clerical), lower social grades are C2DE (skilled and unskilled manual/long-term dependent on state benefit).

Table 3.2: The percentage of people in employment working at home and travelling to work at least once a week - pre-pandemic, November 2021 and November 2022

(* denotes statistically significant difference vs pre-pandemic)

(** denotes statistically significant difference vs November 2021)

	At least once a week pre-pandemic (January-March 2020)	At least once a week over the past four weeks (November 2021)	At least once a week over the past four weeks (November 2022)
Work at home (described as 'paid employment from where you live')	28%	47%	46%*
Travel to place of work	82%	70%	78%**

Source: Ipsos/DfT, Base: 1,450 adults in England, 15th November-21st November 2022, November 2021: Base: 1,392 adults in England, 4th November-29th November 2021

Data for January-March 2020 based on recall collected in November 2021

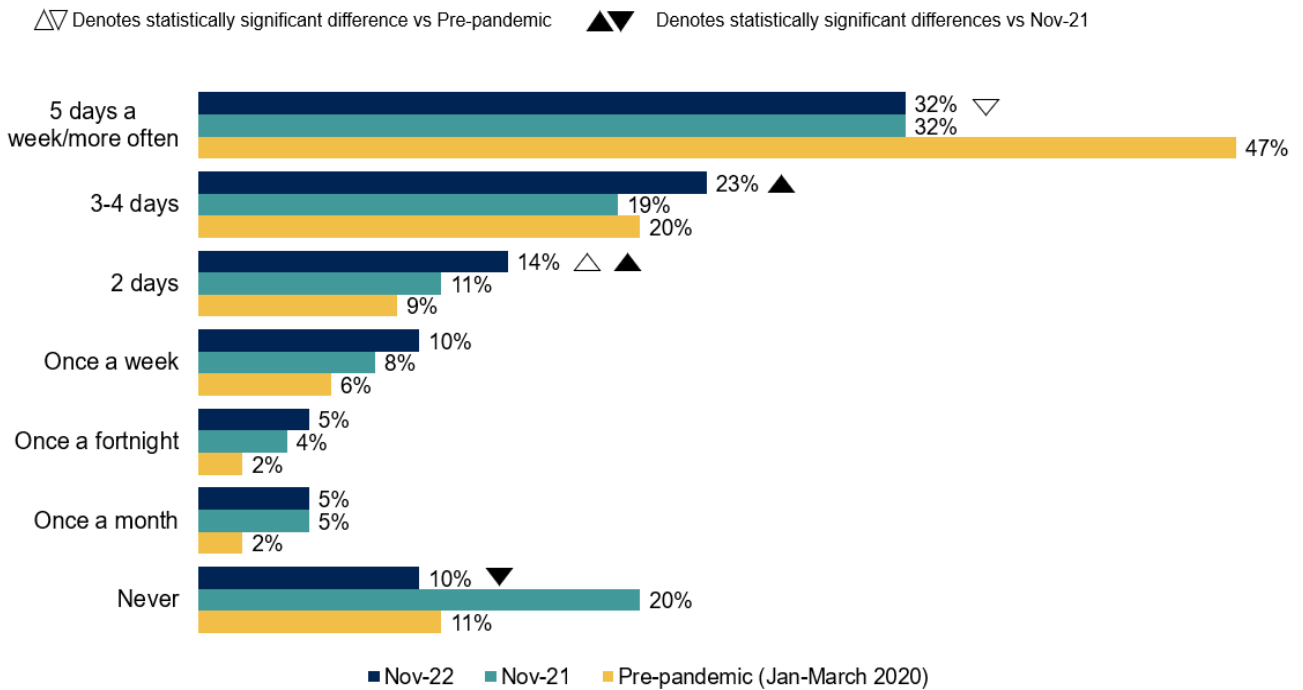
Q20. How often, if at all, did you typically do each of the following during the last 4 weeks? Travel to place of work/ Work at home – that is, you did paid employment from where you live.

W6Q63aNEW. How often, if at all, did you typically do each of the following during the period immediately before the first UK-wide 'lockdown', that is the period between 1st January 2020 and 23rd March 2020? – Travel to place of work/ Work at home – that is, you did paid employment from where you live.

While the proportion of employed people travelling to a place of work at least once a week in November 2022 was in-line with the period immediately before the pandemic, the frequency of doing this changed markedly.

As Figure 3.2 shows, the proportion of people in employment who travelled to a place of work at least five days a week in November 2022 (32%) was significantly lower than pre-pandemic (47%).

Figure 3.2: Frequency of travel to a place of work for those in employment



Source: Ipsos/DfT, Base: 1,450 adults in England, 15th November-21st November 2022, November 2021: Base: 1,392 adults in England, 4th November-29th November 2021

Data for pre-pandemic based on recall collected in November 2021

Q20. How often, if at all, did you typically do each of the following during the last 4 weeks? Travel to place of work W6Q63aNEW. How often, if at all, did you typically do each of the following during the period immediately before the first UK-wide 'lockdown', that is the period between 1st January 2020 and 23rd March 2020? - Travel to place of work

Looking at more recent changes in commuting patterns over the 12-months to November 2022, there was a significant increase in the proportion of people in employment who travelled to their workplace at least once a week in November 2022 compared to November 2021. As shown in Table 3.2, nearly eight in ten (78%) employed people travelled to a place of work at least once a week in November 2022 compared to seven in ten (70%) in November 2021. There was no change in the proportion of employed people who worked from home – 46% in November 2022 and 47% in November 2021.

Figure 3.2 shows that between November 2022 and November 2021 there have been increases in the proportions of employees travelling to work 3-4 days a week (23% in November 2022 vs 19% in November 2021) and 2 days a week (14% in November 2022 vs 11% in November 2021).

When respondents in November 2022 were asked how often they expected to travel to a place of work in the first few months of 2023, they said that they would do this about as frequently as at present. 75% of employed people said that they expected to travel to a place of work at least once a week in the first few months of 2023, compared with 78% who said that they did this at present (in November 2022). The proportions of employed people expecting to travel to work at least five days a week (30%), 3-4 days a week (22%) and 2 days a week (13%) in the first few

months of 2023 were also in-line with the proportions who said they did this at present (32%, 23% and 14% respectively).

The similarity between present and expected future behaviour was also evident for working from home. Just over four in ten of those in employment, 43%, expected to work from home in the first few months of 2023, in line with 46% who had done this in November 2022.

The focus groups and depth interviews also covered experiences among those in employment who had adapted to hybrid working patterns. They found wide variation in current working patterns adopted. For instance, there were participants who reported going to their place of work two to three times per week, while some reported doing this only once per week. Others only attended their workplace for large in-person meetings or training sessions.

Participants shared several examples of negotiations with employers about the frequency they attended the office. This was most often due to financial considerations and wanting to keep commuting costs to a minimum. Participants also felt it was difficult to tell whether their employers might make any further changes to their hybrid working policy, but that there was a sense that these policies were still evolving in the post-pandemic era.

“(Employer) wants people in the office and they give people the flexibility to work from home.”

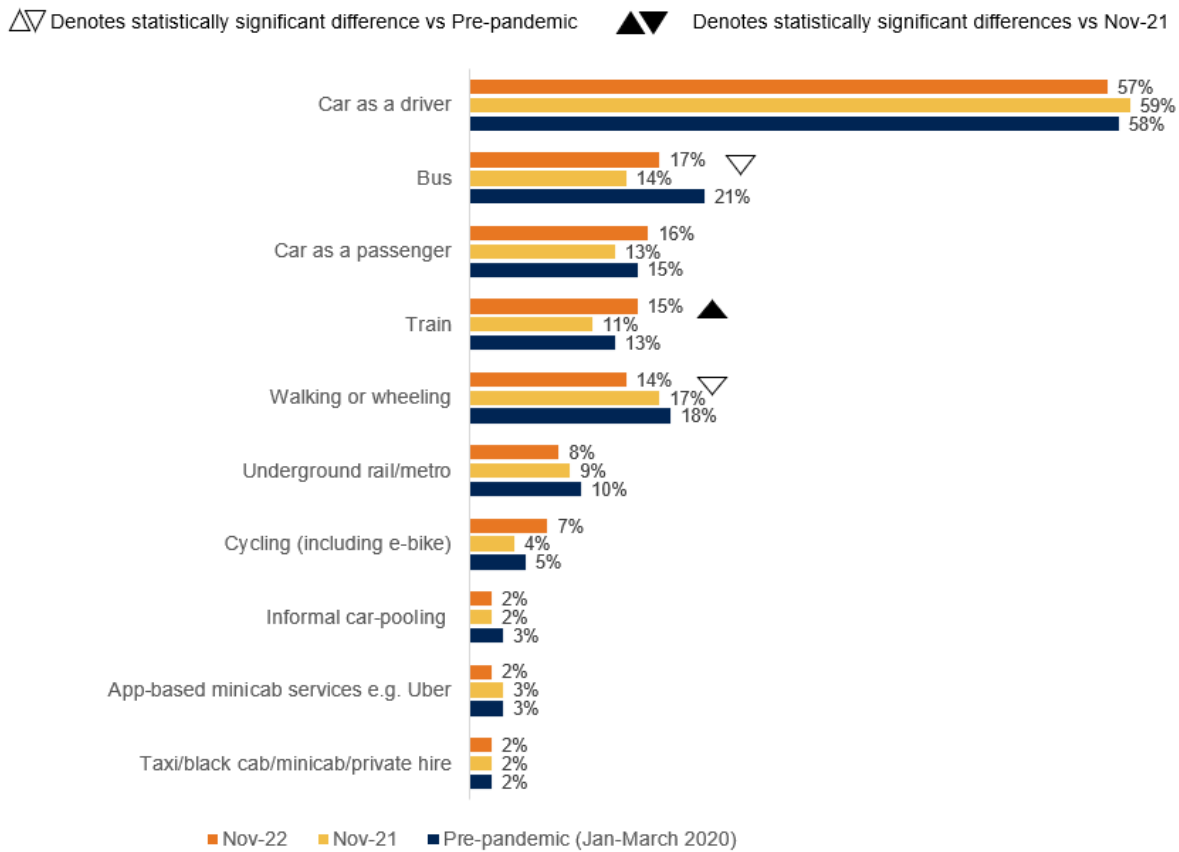
*Participant working from home on at least 2 days per week
(depth interview)*

3.4 How did modes used for commuting change?

Figure 3.3 shows modes of travel used for commuting for November 2022, November 2021 and in the three-month pre-pandemic period (the pre-pandemic measure was sourced from the survey in November 2021). Commuting by car as a driver was the most common mode in November 2022 (used by 57% of commuters), which was used by a similar proportion of commuters during the three-month pre-pandemic period (58%). Similarly, the proportion of people commuting by car as a passenger in November 2022, at 16%, was comparable with the proportion pre-pandemic (15%).

However, there have been some changes in the use of other modes for commuting. Travelling to work by bus and walking or wheeling all the way to work was significantly lower in November 2022 than it was before the pandemic. While 17% commuted by bus in November 2022, the proportion had been 21% pre-pandemic, while walking or wheeling had decreased from 18% to 14% over the same period. The proportion of people commuting to work by train in November 2022 (15%) was higher than in November 2021 (11%) but still comparable with the proportion pre-pandemic (13%).

Figure 3.3: Modes used during November 2022, November 2021 and pre-pandemic for travelling (commuting) to work



Source: Ipsos/DfT, Base: 946 adults in England, 15th November-21st November 2022, November 2021: Base: 831 adults in England, 4th November-29th November 2021

Data for pre-pandemic based on recall collected in November 2021

Q2B. Still thinking about the last 4 weeks, which, if any, of these modes of transport did you use when... travelling to (commuting) to a place of work? Please indicate all that apply.

Q2dNEW: Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, which, if any, of these modes of transport did you use when travelling (commuting) to place of work?

In the focus groups participants generally reported travelling to their place of work using the same mode of transport as before the pandemic. However, it was common for participants, including both those who travelled by car and those who used public transport, to have changed the time of their commutes to avoid heavy traffic or busy services. Participants described how employers had brought in new policies following the pandemic which gave them the opportunity to arrive at their place of work later than their previous starting time.

“My employer is flexible, so I do sometimes go in later to avoid traffic.”

*Participant working from home on at least 2 days per week
(depth interview)*

Participants with hybrid working patterns were asked whether their views of how far they were willing to commute had changed compared to before the pandemic. There was no clear consensus; while one set of participants suggested they had a lower propensity to travel and wanted to see future jobs closer to home, another group said it was less important that their

place of work was close to home. This latter group said they would therefore be willing to travel longer distances since they now commuted much less frequently.

“In the future...ideally something closer to home, I haven't worked a 9/5 Monday... since 2017... I want this so I can be closer to family and friends.”

*Participant unable to work from home and commuting to work only using public transport
(focus group 3)*

Participants reported feeling settled into new routines and felt that the benefits they had gained outweighed the drawbacks. The most cited benefits of hybrid working were increased flexibility, reduced commuting time and costs, and improved work-life balance. Challenges of hybrid working included difficulty separating work and personal life when working from home and feeling isolated from colleagues. When thinking about future roles, participants said that working on a hybrid basis had now become a necessary pre-requisite to considering job opportunities.

4 Barriers to using public transport

- In November 2022, just under a third of people (30%) said they avoided public transport due to concerns around Coronavirus, a proportion which had fallen since November 2021 (46%) (see **section 4.1**). However, it is notable that nearly a third of people said they did avoid public transport for this reason. Focus group discussions highlighted the importance people placed on adequate ventilation and cleanliness (see **section 4.2**).
- When people in November 2022 were asked what would encourage them to use public transport more, financial incentives were most mentioned, along with more frequent and punctual services (see **section 4.2**), whilst issues related to Coronavirus (ventilation, low numbers of Coronavirus cases) were mentioned less.
- A third of people (33%) agreed they found it difficult to choose the most suitable ticket when travelling by public transport. Focus group participants suggested that clearer and more visible information about current ticketing options was needed (see **section 4.3**).

This chapter describes the main groups who were less likely to travel by public transport in November 2022, before exploring the impact of Coronavirus and infection on the decisions people make about how to travel. It summarises people's attitudes towards the use of public transport including those that were car reliant and those that already used public transport, and what they said would encourage them to use it more looking specifically at the role of cost.

The depth interviews (but not the group discussions) took place after the introduction of the £2 cap on 1st January 2023 for most bus fares in England outside London. The initiative was originally scheduled to run until 31st March 2023 but was extended for a further three months and is currently due to end on 30th June 2023.

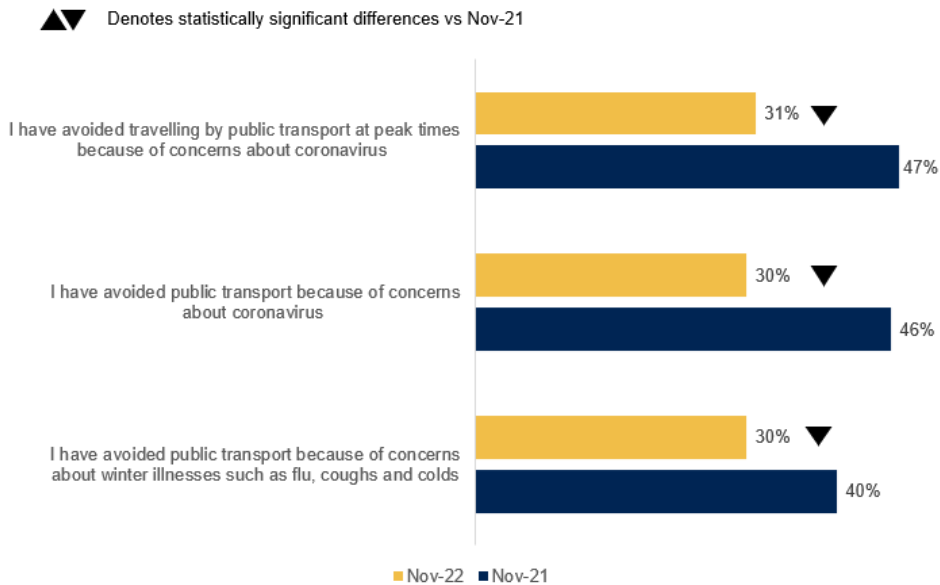
4.1 Who did not use public transport? Was Coronavirus a factor?

As described in chapter 2, the proportion of people who travelled by public transport modes (at least monthly and at least weekly) - bus, train and underground/metro - in November 2022 remained significantly below that immediately before the pandemic in January-March 2020.

As was the case in November 2021 and the period before the pandemic, some groups were relatively *less* likely than others to use public transport during November 2022. These included people in older age groups and those living in rural areas. For example, 41% of 55- to 75-year-olds and 27% of people living in rural areas used a bus in November 2022 compared to 48% overall. Train use was 29% among those aged 55-75 and 26% in rural areas compared to 43% overall.

Comparison with previous *All change?* surveys suggests that concerns related to Coronavirus became a weaker disincentive to using public transport between November 2021 and November 2022. Figure 4.1 shows that 30% of people said they had avoided public transport due to concerns about Coronavirus in November 2022. This represents a significant drop from 46% in November 2021, a point at which restrictions introduced during the pandemic had been lifted and before concerns about the Omicron variant took hold.

Figure 4.1: % agreed ‘I have avoided travelling by public transport...’ – November 2022 compared to November 2021



Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022, November 2021: Base: 2,271 adults in England, 4th November-29th November 2021

Q7. Now thinking about the last 4 weeks, to what extent do you agree or disagree with each of the following? Please indicate if the statement is not applicable.

Focus group discussions also saw participants reporting an easing of concerns about travelling on public transport and the risk of infection. Participants described how a sense of normality or near-normality had gradually returned after restrictions and Covid-19 precautions were lifted and as more people returned to previous activities.

“During covid I was very worried and didn't go on public transport. Now that isn't my primary concern. I work in a school and am surrounded by germs all day long. For me not travelling on public transport is more about the fact it is winter, and I don't want to be stood in the cold on my own.”

Participant reliant on travelling by car more than any other form of transport (focus group 6)

People with a physical or mental health condition were significantly more likely than average to have avoided public transport in November 2022 because of concerns about Coronavirus; 38% compared to 30% of people overall. Similarly, focus group participants who reported continued concern about travelling on public transport tended to either have a long-term health condition themselves, or were in contact with vulnerable people as part of their work or personal/family life.

Those from ethnic minority backgrounds and younger people, aged 16-34, were also more likely to have said they avoided public transport due to concerns about Coronavirus; 38% and 35% respectively said they had done this. This was also the case for people living in London where 38% said they had done this, potentially reflecting the large Underground network there. Previous *All change?* research showed greater perceived risk of infection when travelling this way compared to other public transport options.

The same sub-groups were also more likely to have said they avoided travelling on public transport at peak times because of concerns about Coronavirus and to have avoided public transport because of concerns about winter illnesses such as flu, coughs and colds. For example, 39% of those from ethnic minority backgrounds, 40% of those from London and 36% of those aged 16-34 said they had avoided public transport in November 2022 because of concerns about winter illnesses, compared to 30% of people overall.

4.2 What did people say would encourage them to use public transport?

In the survey, factors relating to Coronavirus were mentioned infrequently as factors that would encourage more use of public transport. As Figure 4.2 shows, 15% of people identified passengers wearing face coverings as among two or three things likely to encourage them to consider travelling more by public transport, and 7% selected better ventilation. However, ventilation was mentioned frequently throughout focus groups discussions. This was considered particularly important for journeys made by public transport at peak hours and participants described being close to other passengers. They wanted to see improved air flow throughout vehicles and carriages even if this meant colder temperatures onboard.

While participants did not show any desire for the reintroduction of requirements relating to mask-wearing, enhanced cleaning protocols were seen as a necessary permanent feature of service provision. Not only did participants have an increased awareness and understanding of transmission of airborne viruses such as Coronavirus but they also appeared more knowledgeable about what was needed to keep surfaces clean. They were keen to see signs of enhanced cleaning on board buses and trains to ensure these environments were sanitised to a reasonable standard.

“I’m very big on cleanliness... I just want them to clean them, like really. Buses too.”

*Participant reliant on travelling by car more than any other form of transport
(focus group 5)*

“For me, that’s one of the main reasons why I wanted to work locally and travel to work in my car. When I get on the tube, I get really conscious about people coughing and spluttering. I’m ok with people not wearing a mask, but you have a really small chance of not catching something and it’s packed on the Tube”

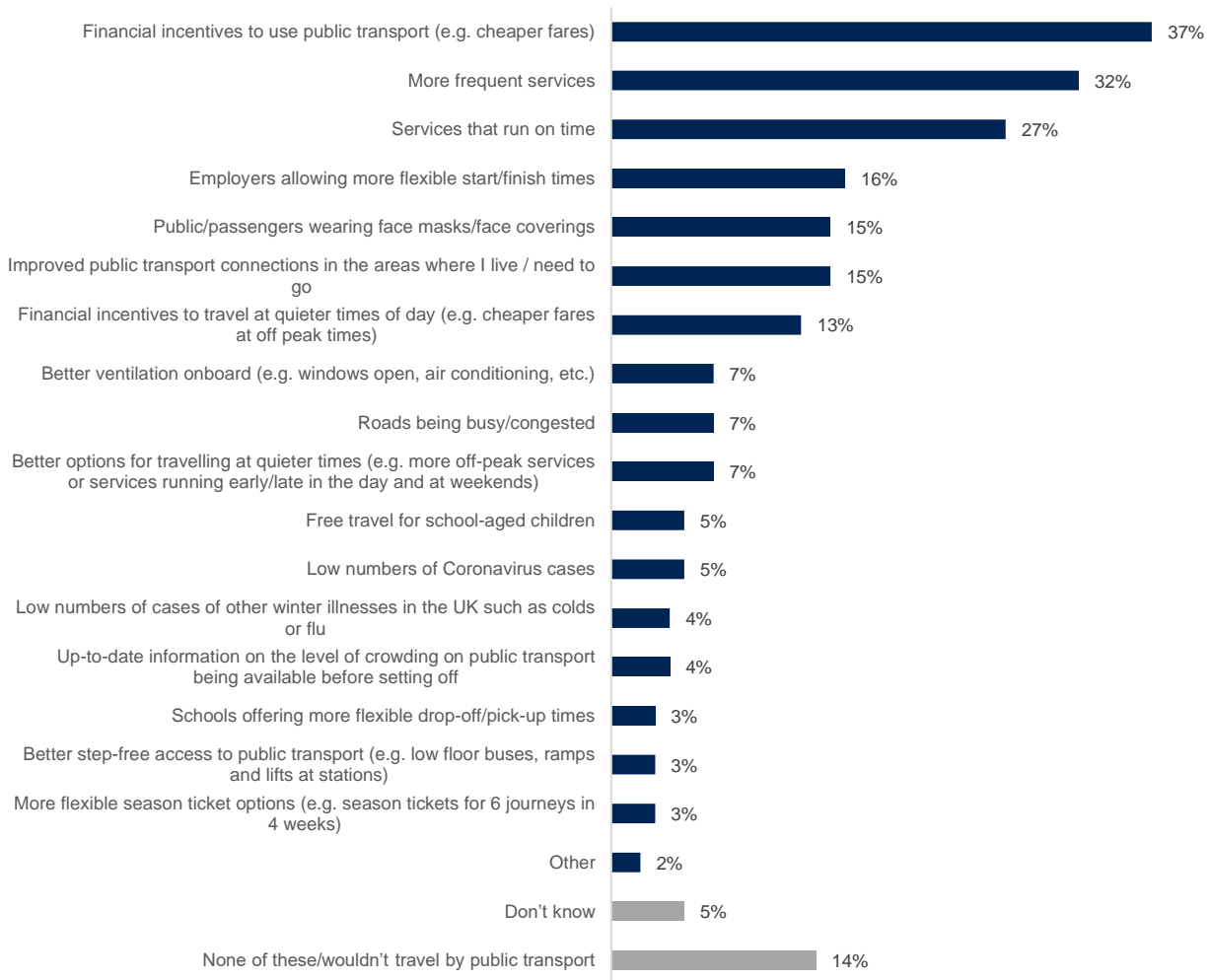
*Participant unable to work from home and commuting to work only using public transport
(focus group 3)*

Previous *All change?* surveys have asked people which two or three factors from a list would encourage them personally to consider travelling more by some form of public transport, a question repeated in November 2022 (although there were some changes to the way the question was asked)⁴. Previous *All change?* surveys detected the growing importance of more frequent and reliable services and financial factors as restrictions were lifted. Over time, smaller proportions of people selected issues relating to Coronavirus.

As Figure 4.2 shows, in November 2022, financial incentives were a top-mentioned requirement, selected by 37% of people. More frequent services (32%) and services that run on time (27%) were also among the requirements most likely to encourage people to use public transport more in the future. The focus group discussions took place during a period of heightened concern about rising prices and participants described the importance of cost savings as a potential incentive to travel by public transport. Frequency and reliability of services were also top of mind.

⁴ Factors associated with Coronavirus restrictions - no longer relevant in November 2022 - were removed e.g. 'passengers and staff practicing social distancing behaviour while travelling – that is, staying a set distance apart, including at bus stops, on platforms, and in stations'.

Figure 4.2: Factors/requirements to encourage travelling more on public transport



Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022

Q8. Which two or three, if any, of these would encourage you personally to consider travelling more by some form of public transport – that is by bus, train, tram or underground/metro railway?

The remainder of this chapter outlines key findings from the survey, focus groups and depth interviews on the main barriers to use of public transport among non-users, the factors preventing additional use among existing users and how both groups could be encouraged to use public transport more.

The focus group discussions found a common view that improvements to the frequency of public transport were needed among those using public transport as well as those not already travelling in this way. Participants said that more frequent services would encourage them to feel they could rely more on public transport to arrive at their destination on time.

Participants raised concerns about the reliability of public transport services and were of the view that improvements in this area were key to building trust and confidence that services would run to schedule as the norm, with disruption occurring only exceptionally. Poor reliability was a recurring theme for participants who used public transport regularly as well as those who had not used public transport either recently or for several years.

“I think there just needs to be more buses and more reliable trains. I do get fed up with the fact that the apps are never accurate either, that would help. I think that would encourage people to go on them and if there were more of them, then I would definitely travel on more trains and more buses.”

*Participant making at least four separate short or long-distance journeys each week by train
(focus group 10)*

Views about the reliability of trains were strongly influenced by recent rail strikes. Strikes had directly impacted some participants and, even for those who had not been directly impacted, had influenced participants' perceptions of the reliability of using trains to travel. In some cases, participants explained how they had started to plan journeys in a different way, substituting train journeys with car journeys as a result.

Issues relating to traffic were associated most readily with the reliability of buses, with this being something that participants said had discouraged them from using buses in the past due to the unpredictable nature of the journey.

“Yes, just in general, just getting a train and a bus is quite long anyway. It's like trying to get a connection and it's like a losing battle, do you know what I mean? Because if the bus is late then you miss that train, then you're going to be late for work anyway because your bus is late, it's kind of a stress.”

*Participant reliant on buses/public transport more than any other form of transport
(focus group 7)*

Improving the reliability of public transport was particularly important when participants considered how they travelled to work. Participants gave examples of distrusting whether services would arrive on time or at all, encouraging them to swap public transport for travelling by car instead.

“My preference would actually be to use public transport because I used to do it before and I know it does work. Just the reliability and some bad experiences have made me switch completely for the good part of two years. I don't know if it's going to change, but I think so far the convenience aspect has kept me going. If it doesn't change I'll probably get a more green car.”

*Participant reliant on travelling by car more than any other form of transport
(focus group 6)*

Safety on board was also identified as a deterrent to using public transport by a range of participants, including women across all age groups as well as men travelling with their children. Anti-social behaviour on buses was of specific concern and there were cases where participants reported experiencing particularly negative experiences onboard. However, these participants were also clear that even if these concerns were addressed, they were unlikely to be sufficient to encourage greater use of public transport until other barriers, such as reliability and cost were also addressed.

What did those most reliant on cars say would encourage them to use public transport more?

In the survey, just over half of people, 51%, agreed that they had been reliant on travelling by car during November 2022 and 54% agreed that they 'couldn't get by' without their car. Seven in ten people living in rural areas said they had been reliant on a car in the previous four weeks, 72%, as did six in ten of those aged 55-75, 62%.

The survey found that those who reported being reliant on a car were significantly more likely than average to select improved transport connections as offering encouragement to use public transport more - 19% compared to 15% of people overall. However, this group also had financial incentives (37%), more frequent services (32%) and services that run on time (27%) among their most selected requirements to use public transport more.

Similarly, the focus group discussions highlighted a range of additional factors and encouragements necessary for car users to consider switching modes. Those most common consideration among this group was how they could reduce the amount they spent on travel. Therefore, these participants felt they would consider using public transport when it offered a significant saving, compared to the cost of using their car for a particular journey. When such a journey did prove cheaper by public transport, they also said they would consider trading-off savings against other considerations such as convenience.

Another significant concern for car owners was the cost of owning and maintaining a car. Car-ownership was recognised as a significant financial burden, even more so following rapid increases in petrol and diesel prices during Spring/Summer 2022.

"I didn't used to think about it but now I'm constantly looking at whether the price of fuel has gone up or down by pennies. In my head I'm starting to count the pennies. 20/30 years ago, money was tight and things were hard and it feels like it's coming full circle again, me and my children are having to start making more considered choices. Now it's something that's constantly on my mind."

*Participant working from home on at least 3 days a week
(focus group 2)*

When factoring-in costs of entering newly established clean air zones plus accessing and paying for parking at journey destinations, public transport was often seen as a more appealing option. Indeed, clean air and congestion zones were identified as a significant deterrent to driving into large cities. Participants reported that the additional cost of entering a zone, allied to the additional cost and inconvenience of finding an available parking space, made driving into urban areas unappealing. Several examples were provided of high parking costs disincentivising driving into local towns and cities, prompting a choice to travel by train instead. Set against this, there were also examples of participants choosing not to take the train into a city because of the high car parking costs at local train stations.

“I would mainly take public transport because it's more convenient because obviously you have to pay for the parking.”

*Participant reliant on buses/public transport more than any other form of transport
(focus group 7)*

Travelling by tram was one option car users who lived in towns/cities with a tram network said held appeal. But interest was conditional on a tram stop being within reasonable walking distance and tickets being affordable. The appeal of trams was their perceived reliability with journeys being unaffected by traffic congestion. This meant that participants felt they could plan and schedule journeys in the same way that they did when using their car. Participants also considered trams to be a more comfortable journey experience compared to travelling by local buses and trains, most often due to the sense of a more spacious and modern interior onboard.

What would encourage those already using public transport to use it more?

Financial incentives (37%), more frequent services (32%) and services that run on time (27%) were the top-mentioned requirements for *frequent* users of public transport, as they were among the wider public. They were, though, significantly more likely to select several other requirements relating to improved flexibility. For example, a quarter of those already using public transport *frequently* (at least once a week), 23%, chose employers allowing more flexible start/finish times, compared to 16% overall. Just under two in ten of *frequent* public transport users, 18%, selected financial incentives to travel at quieter times of day (e.g. cheaper fares at off peak times), compared to 13% overall.

The focus groups discussions highlighted several possible ways to encourage further use of public transport among those already travelling this way:

- **Improve the frequency and reliability of services.** Within the focus groups, participants said they wanted more reliable and frequent services. By this they meant a greater choice of services with the effect of reducing busyness. This was, in turn, more likely to improve the reliability of being able to travel by public transport and arrive at a destination without significant delay.
- **Real-time information.** Participants highlighted the importance of access to real-time information about public transport schedules, delays, and route changes. They felt that this would help them to plan their journeys more effectively and increase their ability to rely on public transport. Taxi ride-hailing and apps such as Uber were mentioned as examples of services providing good information. Live trackers of the number of seats available on services would also be helpful in supporting journey planning.
- **Improving passenger experience.** Participants said they wanted more comfortable, convenient, and enjoyable public transport experiences. This included cleaner and better-maintained vehicles and carriages, particularly in respect to buses. Access to free Wi-Fi and individual charging points were seen as beneficial, allowing time spent travelling to be more productive.

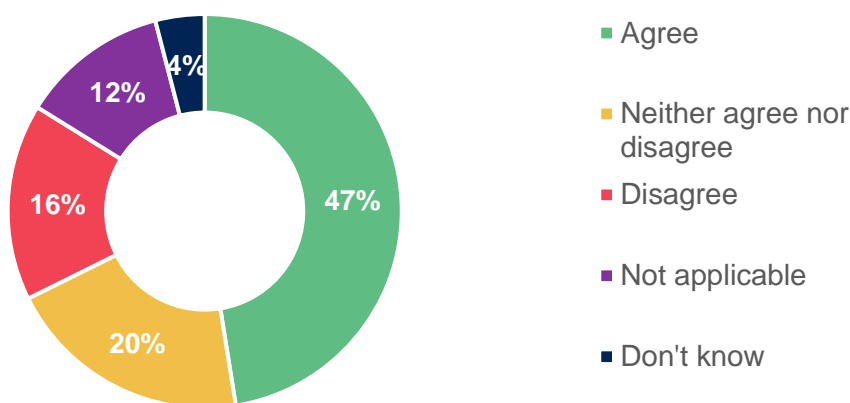
Participants also mentioned scope to improve access to refreshments on longer journeys. For example, this was perceived as akin to emulating the experience of stopping at a service station on a long car journey with better access to higher quality beverages and food, and a dedicated space for passengers to stretch their legs. It was felt that this was an experience that realistically could be improved on trains in future.

- Increase awareness of the benefits of public transport.** Participants felt that promoting the potential cost, health and environmental benefits of public transport through advertising and social media campaigns could help to change attitudes and encourage more people to use these modes of transport over cars in future. While it was not a specific focus of the research, there was a noticeable focus on physical and mental health among participants, with some acknowledging that their interest in this had increased following the pandemic, which they felt had detrimentally affected their health. The walking typically required to reach public transport locally was felt to have many benefits. In some cases, the cost benefits of using public transport compared to travelling by car were seen as potential areas for further promotion. Participants felt it was also worth highlighting the benefits to the environment of choosing to travel in this way.

4.3 What did people think about the cost of public transport?

As shown in Figure 4.3, 47% of people, including car owners and non-owners, tended to agree or strongly agreed that they found it cheaper to travel by car than use public transport. This sentiment was particularly strong among those who said they had been reliant on a car in the past four weeks; 63% of this group agreed % agreed/disagreed – ‘I find it cheaper to travel by car than use public transport’.

Figure 4.3: Percentage of people who agreed they found it cheaper to travel by car than use public transport



Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022

Q29. To what extent do you agree or disagree with each of the following? - For the journeys I make, I find it cheaper to travel by car than use public transport

The focus group discussions and depth interviews suggested that improving people’s understanding of the cost of travelling by car relative to public transport could encourage some

people to consider switching modes. Depth interview participants found it easier to calculate the cost of travelling by public transport than by car. While the ticket fare associated with a journey by public transport was considered very simple to grasp, calculating the cost of travelling by car was more complicated including running costs (insurance, road tax, MOTs, maintenance) and fuel costs as well as the upfront cost of purchasing a car. Participants' own attitudes or preferences towards budgeting and their financial literacy also played a role in their ability to calculate costs.

In the survey, a third of people, 33%, agreed they found it difficult to choose the most suitable ticket when travelling by public transport. Table 4.1 presents the groups more likely than average to have agreed with this statement.

Table 4.1: Selected groups - % agreed - 'When travelling by public transport, it is difficult to choose the most suitable ticket'

(*denotes statistically significant vs all adults)

	%	± difference
All adults (average)	33	n/a
Fallen behind on payments in the past 12 months	45*	+12
Parents	41*	+8
Aged 16-34	40*	+7
(Self-reported) reliant on car	38*	+5
<i>Frequent</i> public transport users	38*	+5
All public transport users	37*	+4

Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022

Q29. To what extent do you agree or disagree with each of the following? - When travelling by public transport, it is difficult to choose the most suitable ticket

Focus group discussions found participants suggesting that clearer and more visible information about current ticketing options was needed. Participants said they felt a better understanding of these options would encourage them to consider using public transport more particularly when planning commutes to work and navigating hybrid working arrangements. They said they were unaware of any current ticketing options that offered them cost savings when travelling flexibly on one, two or three days each week relative to buying tickets for each day individually.

"I haven't seen anything and there should be a lot more of it, I've never seen anything advertised or on the tube or social media, I think they need to invest in that."

Participant unable to work from home and commuting to work only using public transport (focus group 3)

5 Travel and the rising cost of living

- In November 2022, just over a third of people (35%) said they were finding it ‘difficult’ or ‘very difficult’ to cope financially on their household’s income (see **section 5.1**). This group of people were more likely to report having made changes to their travel behaviours in the three months leading up to this point.
- Those most significantly impacted by the increase in the cost of living were younger adults aged 16-34, people from ethnic minority backgrounds, parents, those in lower income households and those with a mental or physical health condition (see **section 5.1**).
- People’s most reported way of saving money on transport and travel was walking more: this was reported by 57% of people. Additionally, just under half (46%) said they had reduced the number of trips/non-essential journeys they were making (see **section 5.2**).
- Focus group and interview participants described taking a more conscious approach to the decisions they made about travelling, including considering and planning whether and how to make journeys. Those with greater reliance on public transport tended to think they had fewer opportunities to make alterations to how they travelled compared to car owners (see **section 5.2**).

In the 12 months leading up to November 2022, the inflation rate in the UK rose to 10.7%⁵ compared with the Bank of England’s target rate of 2%⁶. This was the highest inflation rate seen in the UK in over 40 years⁷, peaking in October 2022 at 11.1%⁸. This higher inflation rate caused costs for goods and services in the UK to increase, with the biggest cost increases seen in household fuels (gas, electricity), fuel costs for vehicle owners (petrol, diesel), and food costs.

It is widely agreed that a combination of factors led to the inflation rate rising, including the post-Covid reopening period, global supply chain disruption and the Russia-Ukraine war⁹. While costs for goods and services increased by up to 11.1%, people’s pay in the UK on average

⁵ Gooding, P. (2022) Consumer price inflation, UK: November 2022, Consumer price inflation, UK - Office for National Statistics. Office for National Statistics. Available at: <https://www.ons.gov.uk/economy/inflationandpriceindices/bulletins/consumerpriceinflation/november2022> (Accessed: February 8, 2023).

⁶ Hourston, P. (2022) Cost of living crisis, Institute for Government. Available at: <https://www.instituteforgovernment.org.uk/explainer/cost-living-crisis#:~:text=Inflation%20is%20outstripping%20increases%20in,the%20same%20period%20in%202021> (Accessed: February 8, 2023).

⁷ Inflation rates in the United Kingdom (no date) Worlddata.info. Available at: <https://www.worlddata.info/europe/united-kingdom/inflation-rates.php> (Accessed: February 8, 2023).

⁸ Payne, C. (2023) CPI annual rate 00: All items 2015=100, CPI ANNUAL RATE 00: ALL ITEMS 2015=100 - Office for National Statistics. Office for National Statistics. Available at: <https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/d7g7/mm23> (Accessed: February 8, 2023).

⁹ Hourston, P. (2022) Cost of living crisis, Institute for Government. Available at: <https://www.instituteforgovernment.org.uk/explainer/cost-living-crisis#:~:text=Inflation%20is%20outstripping%20increases%20in,the%20same%20period%20in%202021> (Accessed: February 8, 2023).

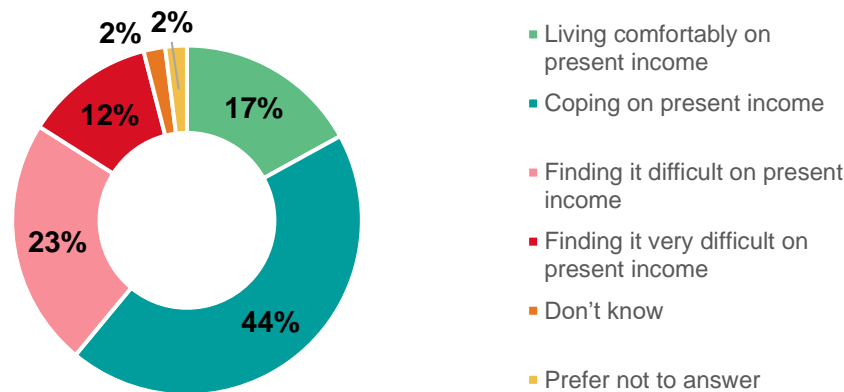
increased by only 4.3% (in the period between March and May 2022)¹⁰. This meant that 2022 saw a fall in people's real disposable incomes.

This chapter presents evidence of the impact of the rising cost of living on people's financial situation as a precursor to examining people's travel behaviours and future travel plans. It reports on differences among key demographic groups of interest.

5.1 What was the impact of the rising cost of living?

As Figure 5.1 shows, in November 2022 17% of people in England said they were living 'comfortably' on their current income, with 44% 'coping'. Just over a third (35%) said they were either finding it 'difficult' or 'very difficult' to cope on their present income. These feelings will have been influenced by the rising cost of living but, alongside this, many people had experienced other changes in their circumstances. For example, 11% said they had changed their job or got a new one in the past 12 months, 7% lived in a household in which someone had lost their job or become unemployed during this period, 6% had moved house, and 19% reported that they had experienced a decrease in household income.

Figure 5.1: Feelings about current household income, November 2022



Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022

Q25. From this list, which of these phrases comes closest to describing your feelings about your household income these days?

Younger people aged between 16-34, those from ethnic minority backgrounds, parents, and those with either a physical or mental health condition were significantly more likely to report finding it 'difficult' or 'very difficult' to cope on their current income, as shown in Table 5.1. This was also the case among those in social grade C2DE households¹¹ and lower income households with annual earnings up to £19,999.

¹⁰ Monetary policy report - August 2022 (no date) Bank of England. Available at: <https://www.bankofengland.co.uk/monetary-policy-report/2022/august-2022> (Accessed: February 8, 2023).

¹¹ These classifications are based on the occupation of the Chief Income Earner in the household. Higher social grades include ABC1 grades (managers, professionals, administration/clerical), lower social grades are C2DE (skilled and unskilled manual/long-term dependent on state benefit).

Table 5.1: % of selected groups finding it 'difficult' or 'very difficult' to cope

(All percentages are statistically significant vs all adults)

Group	%	± Difference vs the average
All adults (average)	35	n/a
Household income up to £19,999	52	+17
Physical/mental health condition	45	+10
Ethnic minority groups	44	+9
C2DE	44	+9
Parents	43	+8
16-34	42	+7
Household income up to £20,000 to £44,999	39	+4

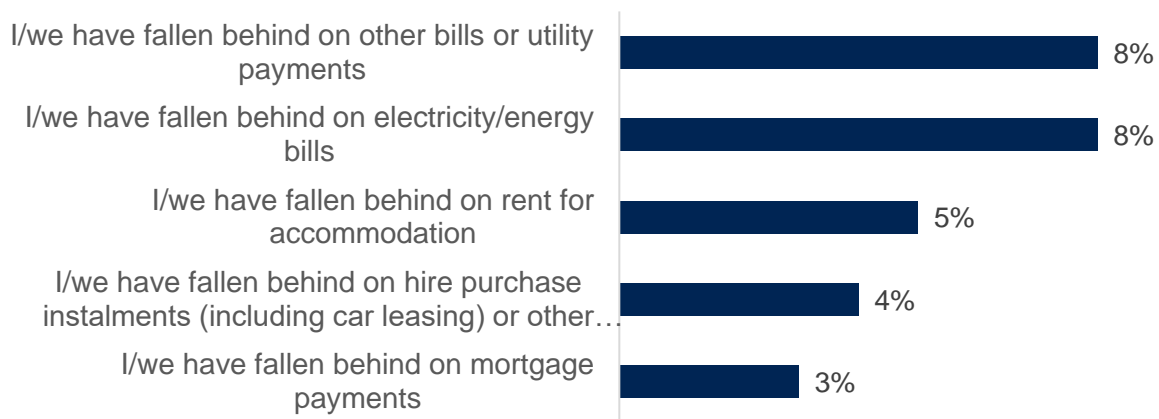
Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022

Q25. From this list, which of these phrases comes closest to describing your feelings about your household income these days?

Just under a fifth of people in England, 18%, said they had fallen behind on at least one of a list of payments in the past 12 months (shown in Figure 5.2). Electricity and energy bills were the most common type of payment people had fallen behind on, followed by other bills or utility payments.

Those who had fallen behind on at least one payment were more likely to be finding it 'difficult' or 'very difficult' to cope on their current income (65%). The profile of this group was very similar to the group who reported finding it 'difficult' or 'very difficult' to cope on their current household income. For example, 15% of younger people aged 16-34-years old and 16% of parents had fallen behind on energy and electricity bills compared to 8% of adults overall. Among those from ethnic minority backgrounds, 15% said they had fallen behind on other bills or utility payments while those living in London were also significantly more likely to report having fallen behind on their energy and electricity bills (12%).

Figure 5.2: Experience of falling behind on payments in the past 12 months



Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022

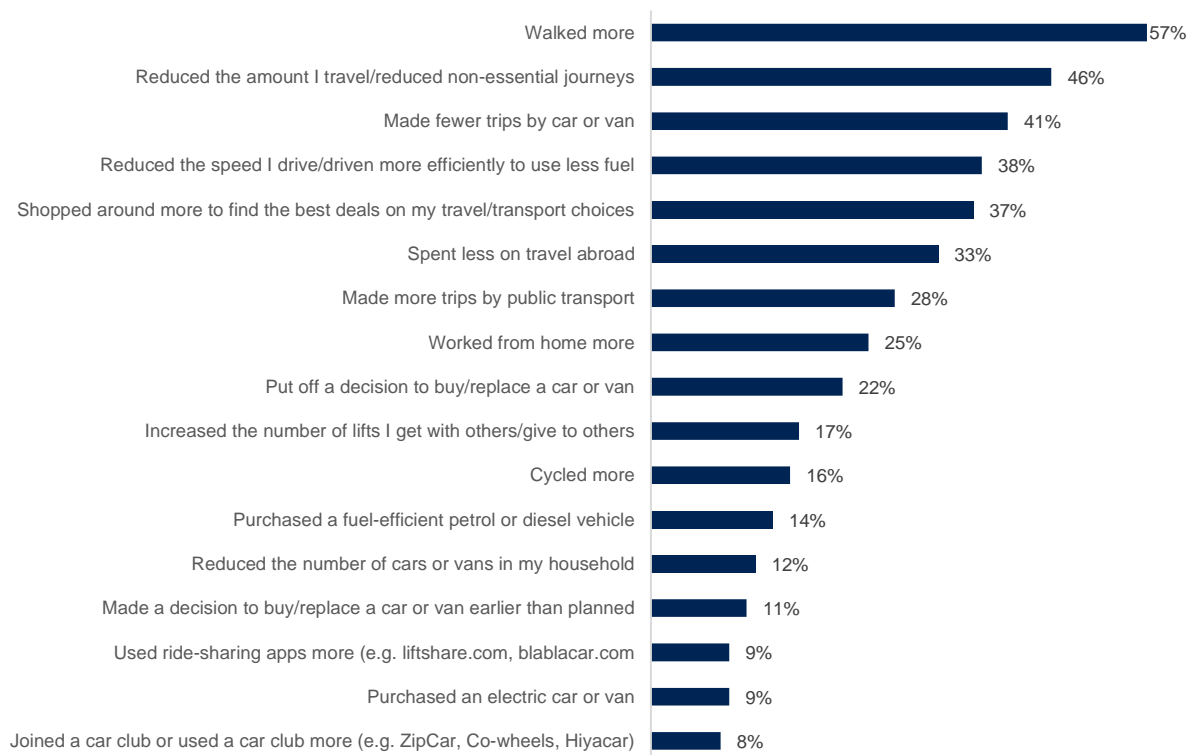
Q26. Thinking about the last 12 months, which, if any, of the following have you experienced?

5.2 What actions were people taking to reduce the amount they spent on travel and transport?

As Figure 5.3 shows, walking more was the most common action that people in England said they had undertaken to reduce the amount they spent on travel and transport during the three months prior to November 2022, reported by 57%. This was followed by reducing travel and non-essential journeys - reported by 46% of people in the previous three months - and making fewer trips by car or van, reported by 41%.

The use of ride-sharing apps, reported by 9%, and joining a car club/ using a car club more (e.g. ZipCar, Co-wheels, Hiyacar), reported by 8%, were undertaken by relatively few people.

Figure 5.3: Actions taken in the past three months to reduce amount spent on transport and travel



Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022

Q27. Below are some actions people may have taken to reduce the amount they spend on transport and travel. Which of these, if any, have you done in the last 3 months?

Participants in the focus group discussions and depth interviews listed a range of changes they had made to how they travelled because of the rising cost of living. However, what was most prominent across all discussions was a significant change in mindset. Participants described taking a much more mindful approach to the decisions they made about travelling, considering and planning whether or not, and how to make journeys. This new outlook applied to *frequent* journeys such as travelling to school with children where a decision was made to walk or take a bus to keep costs down rather than taking the car. For less frequent journeys, there were cases where participants decided not to make leisure journeys such as day visits to another town or visiting family for Christmas because they had calculated the cost of fuel required in advance.

Reducing travel and non-essential journeys

Just over half of those who said they were finding it 'difficult' to cope on their current income, 52%, had reduced the amount they travelled or had reduced non-essential journeys in the previous three months to save money. This had been done by a very similar proportion, 54%, of those finding it 'very difficult' to cope, significantly higher than the 46% among all adults.

The focus group discussions and depth interviews similarly found that reducing non-essential journeys was one of the main ways participants had cut their costs on travel. They described the comparative ease with which they were able to forgo these journeys compared with essential journeys such as commuting to work or shopping for food. Where they had cut back

on non-essential journeys this had saved them spending money on travel, but they also gained the financial benefits of not making the excursion itself. For example, one participant described how they only travelled by car to a local town for dinner once a fortnight, compared to twice a week in the past. As a result, they were benefitting by saving money not only on fuel, but also on restaurant bills.

Changing mode of travel

The proportion of people who said that they had used different modes of transport compared to the 12 months or so before the first “lockdown” was significantly higher among those who had fallen behind on at least one payment in the past 12 months or were finding it ‘difficult’ or ‘very difficult’ to cope on their current income. More than a third, 36%, of those who said they were finding it ‘difficult’, agreed that they had they were using different modes of transport. The equivalent was even higher, 48%, among those who had fallen behind on at least one payment (compared to 29% overall).

Participants in the focus groups described switching modes of transport to reduce costs. They typically described taking a different approach for essential journeys, particularly commuting, because their focus was cutting out non-essential journeys entirely. Switching modes of transport for commuting occurred regardless of whether those in work commuted five days a week or less often. This change was also made by car owners and users who had access to public transport alternatives, allowing them to reduce travel costs.

“So, it's now cheaper paying that £2 (to take the bus) than him paying the diesel to take me to work (in his car).”

*Participant reliant on buses/public transport more than any other form of transport
(focus group 7)*

There were cases where participants had substituted part of their commuting journey for another mode of transport. For some, for example, this entailed driving to a local train station, paying to leave their car in the station carpark for the day, and then taking the train into the city to save fuel costs. This was a cheaper option compared to previous journeys made entirely by car.

This change in behaviour was particularly evident among those living on, or close to, the outskirts of big cities such as London or Birmingham where suburban train networks provided the opportunity to do this. Some participants in the South East of England said they had considered taking the train for their commute but high car parking fees at local train stations had dissuaded them from doing so. They had felt it was more cost-effective for them to continue driving to their place of work and finding affordable parking for their car somewhere in the city centre.

(Re)considering vehicle ownership and type of vehicle

A fifth, 22%, said they had put off/or delayed a decision to buy or replace a car or van in the previous three months, 14% had purchased a more fuel-efficient petrol or diesel vehicle and 12% had reduced the number of cars or vans in their household.

Those aged 16-34-years-old (21%), parents (24%) and ethnic minority groups (27%) were more likely than average (12%) to have reduced the number of cars in their household. The group discussions also found cases of vehicle-owners having sold or changed vehicles to reduce costs. Some said that they had previously been considering selling or changing a car prior to the previous six months when costs had risen most sharply, and that financial pressures had pushed them to make this change sooner than they had expected to.

Participants who had sold a car, becoming a single or no-car household, described sharing the car trips between the household members more than they had done previously, cutting down on the number of car journeys made overall, or switching to public transport. Those who had changed their car had often opted for a less expensive or smaller, more fuel-efficient car. This had the added benefit of being more environmentally friendly, although the reduction of fuel costs was the main consideration.

“I've got rid of my vehicle, and my wife has the car. I now walk my daughter to school every day, rather than getting the car.”

*Participant making at least 4 separate short or long-distance journeys each week by train
(focus group 10)*

Purchasing an electric vehicle was something 9% of people said they had done in the past three months to save money. Discussions in the focus groups and depth interviews found participants open to electric vehicles but questioning whether they would continue to offer cost benefits in the longer term. For example, there was some speculation that the cost of recharging electric vehicles was likely to become as expensive as refuelling petrol and diesel cars. The perceived lack of visible investment in charging infrastructure, the high upfront costs of purchase, and some concerns about the sustainability of production (and the disposal of batteries), contributed to uncertainty about their appeal.

“(With the) costs of electric cars - the everyday person can't afford one of them.”

*Participant unable to work from home and commuting to work by car
(focus group 4)*

Using public transport

Just under three in ten people, 28%, said they had made more trips by public transport in the past 3 months to save money on transport and travel. This was significantly higher for those already using public transport. Over half of those using public transport *frequently* (at least once a week), said they had used public transport more to save money – this was 55% compared to 44% for people who had used *any* public transport over the past four weeks including infrequent users.

Those who had either fallen behind on at least one payment in the past 12 months or were finding it ‘very difficult’, or ‘difficult’ to cope on their current income were significantly more likely to be reliant on public transport. For example, 43% of those who had fallen behind on at least one payment in the last 12 months agreed they relied on public transport and would find it difficult not to use it. Just over a third of those who were finding it difficult or very difficult to cope

on their current income (35% for those finding it very difficult, 32% finding it difficult) also agreed with the statement (compared to 28% overall).

Focus group findings revealed the realities of reliance on public transport and found a sense that this impaired opportunities to reduce costs associated with travel. For example, train travel was considered too expensive but an inescapable cost for those required to travel to a place of work five days a week, or for rail commuters who could work on a more hybrid basis but couldn't travel any other way.

Some participants who were reliant on public transport and didn't have access to a car felt that limited opportunities to travel using public transport in their local area forced them to spend more on travel. For example, one participant lived on the outskirts of a large city and needed to travel to their place of work in the city using two buses. They described the unreliability of the buses sometimes meaning that they were forced to travel by taxi instead, incurring additional costs. In addition, the cost of bus fares was such that it had caused them to consider moving house to reduce travel costs.

"It's becoming really expensive to take the two buses I need to get to work. Sometimes one bus just won't turn up and I'll be stranded, or I'll need to pay for an uber just to make it to work on time. I'm even considering moving house, but that would mean paying more to live closer to the city."

*Participant unable to work from home and commuting to work only using public transport
(focus group 3)*

The sense of dissatisfaction with options to use public transport was also evident in survey findings. Just under half of those who had said they had been reliant on a car over the past four weeks, 48%, agreed that they would like to use different modes of transport to save money but were limited by the options available to them. This was significantly higher than the equivalent 42% among all adults.

Group discussions found a sense among participants based in rural or suburban areas that the lack of good public transport in their local area limited their ability to switch modes and save money. For instance, some participants said they were willing to use public transport more to save money but there were too many barriers. These included a perception that train schedules had become less frequent during the pandemic, while rail strikes were interrupting services. They said that these factors motivated continued use of existing modes of transport, typically travelling by car.

"Once you look outside of London, they need to look at frequency of trains and public transport within other areas. It's great having all these options in London, but not all of us are in London."

*Participant currently working from home on at least 3 days a week
(focus group 2)*

Active travel

Walking more was the most identified action as something done in the three months prior to November 2022 to save money on transport and travel. This was done by 57% of people and a similar proportion, 60%, said they intended to do this in the next the three months.

Users of public transport were particularly likely to report having walked more to save money. Just over two-thirds, 67%, of *frequent* users said they had walked more for this reason. The proportion was also significantly higher among users of taxis/app-based minicab services (62%) and informal car-pooling (64%).

Walking more was also something those finding it difficult or very difficult to cope on their current income were significantly more likely to report having done to save money on travel. Just under two-thirds (64%) of those finding it difficult and 60% of those finding it very difficult to cope had walked more (compared to 57% overall).

5.3 Who was taking action to reduce the amount they spent on travel and transport?

People who reported having made changes to their travel behaviours in the three months leading up to November 2022 often also said they were finding it 'difficult' or 'very difficult' to cope on their current income or who had fallen behind with at least one payment in the last 12 months.

For example, younger adults aged 16-34-years-old were significantly more likely than average to have made more trips by public transport to save money in the past three months; 40% compared with 28%. This age group was also more likely to have cycled more to save money - 24% compared with 16% - and have increased the number of lifts they get or give to others - 28% compared with 17%.

Females were significantly more likely to have walked more to save money than men - 60% compared to 53%. Those from ethnic minority backgrounds were also more likely to use active travel as a way of saving money. Just under two-thirds of those from ethnic minority backgrounds, 65%, said they had walked more (compared to 57% overall) while 28% had cycled more for this reason (compared to 16% overall).

People in London were also significantly more likely to report taking several actions to save money, possibly reflecting the availability of options to do this. For example, just under half said they had used public transport more, 47%, compared to 28% across the whole of England.

Focus group discussions found changes to transport and travel behaviour to be most evident among those reliant on their cars. Participants described an additional new step in their decision-making process involving them calculating the cost of fuel before making a particular journey. They described occasions when they had chosen not to make journeys using their cars when considering the costs to be too high.

Journeys for different purposes were combined to economise on fuel costs more often than had been done six months previously which was a period when car journeys were made more

freely. Then, people used the car as frequently as they needed to and wanted to but that had changed.

“I’m much more mindful when hopping in the car to go here and there. Because it’s on the drive and it’s [the car] so convenient, I didn’t used to think about the cost of it. Whereas now I’m more measured and I consider whether I need to make the journey or whether I can combine journeys. It’s in the back of my mind - can I do this at the weekend? Do I really need to do it now? Whereas I didn’t think about it before. 20 or 30 years ago, money was tight, and things were hard, and it feels like it’s coming full circle again. Even my children are having to start making more considered choices. It’s something that’s constantly on my mind.”

*Participant working from home on at least 3 days per week
(focus group 2)*

Those who did not own cars and who were more reliant on public transport also described changes to how they travelled but tended to identify fewer changes in behaviour compared to those who typically travelled by car. While public transport users were equally as eager to save money where they could, they felt they had relatively fewer opportunities to do so.

Some in this group described substituting part of a journey for walking to ensure that they needed to buy only one ticket for a train or bus whereas previously they would have bought two or more tickets to make this one journey six months earlier. These participants were critical of the cost of longer-distance journeys made by train. When they had decided to proceed with making a journey of this nature, they recalled planning further in advance to try to secure cheaper tickets.

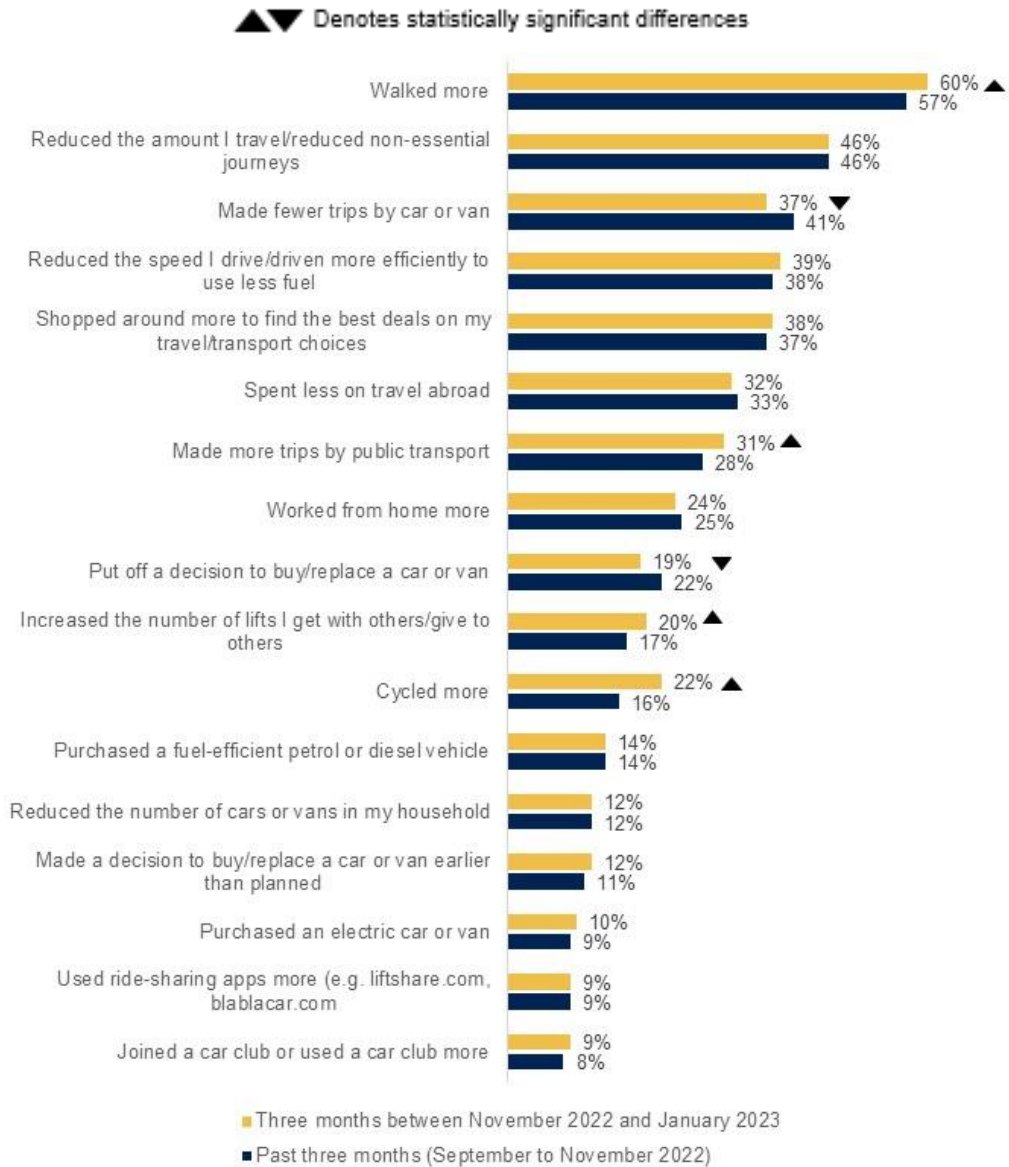
Leisure journeys were the first journeys that were typically removed from schedules to save money among those who were most reliant on their cars but also those reliant on public transport. This was primarily due to petrol costs for drivers, and the costs of tickets for users of public transport. Leisure journeys were deemed non-essential; participants described forgoing trips to see friends or family, particularly when destinations were significant distances away, as well as journeys made to access entertainment such as outings to the cinema, to restaurants or to swimming pools.

5.4 What impact might the rising cost of living have on future travel plans?

Six in ten people, 60%, said in November 2022 that they intended to walk more in the next three months to save money, while just under half, 46%, intended to reduce the amount they travelled or made essential journeys. As Figure 5.4 shows, anticipated behaviours largely mirrored those taken over the previous three months.

Not everyone was looking at transport and travel as an area to save money on. For example, four in ten people, 39%, tended to agree or strongly agree that they would rather save money in other ways than change how they travelled.

Figure 5.4: Comparison of past and future actions to save money on travel and transport



Source: Ipsos/DfT, Base: 2,345 adults in England, 15th November-21st November 2022

Q27. Below are some actions people may have taken to reduce the amount they spend on transport and travel. Which of these, if any, have you done in the last 3 months?

Q28. Below are some actions people may plan to take to reduce the amount they spend on transport and travel. Which of these, if any, do you plan to do in the next 3 months?

In the focus groups and depth interviews, participants described the sense that rising costs would likely continue to influence their considerations around travel plans for the foreseeable future. They felt that this change in mindset would likely be permanent if inflation continued. Participants also said that they would continue to prioritise management of debts and paying of household bills and mortgages and would have these other costs in mind when making decisions about the cost of different transport options and whether to make journeys.

“I don’t see anything changing at the minute, I’m more conscious now... it’s all about money and cost and keeping this down.”

*Participant whose travel had been impacted by the cost of living in the last 6 months
(depth interview)*

6 Sustainable travel

- The prospect of reducing their own personal contribution to climate change motivated a significant proportion of people to say they would travel sustainably. Just over half (53%) said they would be willing to walk or cycle more and four in ten (42%) said they were willing to use cars less.
- However, there was a reduction in the proportion of people willing to take some actions to improve sustainability including reducing flights (37% in November 2022 compared to 42% in November 2021) and increasing active travel (53% in November 2022 compared to 57% in November 2021) (see **sections 6.1** and **6.3**).
- While focus group participants said that they hear more about the environment than they used to, there was a sense that this had not had any significant impact on their thinking or behaviour in respect of travelling. The feeling was that there would be little or no change in people's behaviour until travelling in a more sustainable way becomes cheaper than current options (see **section 6.4**).

Previous chapters have described behaviours and attitudes in respect of a range of sustainable transport options and policies - for example, active travel, public transport, electric vehicles and low emissions zones. This chapter briefly explores the importance of sustainability in decision-making and what actions people said they were willing to take in the future to reduce their contribution to climate change.

The commentary describes how attitudes have changed over a 12-month period between November 2021 and November 2022. It is important to acknowledge that the backdrop to both surveys was very different. The COP26 conference took place in Glasgow in November 2021¹² and the rising cost of living was very prominent during autumn/winter 2022. Ipsos' monthly Issues Index saw mentions of inflation/prices increase from 8% in November 2021 to 45% in November 2022 and mentions of the environment drop from 40% to 16% during this period¹³.

6.1 How did attitudes to sustainable travel change?

The proportion of people considering climate change to be as serious a crisis as Coronavirus fell from 67% in November 2021 to 61% in November 2022.

¹² The COP26 summit was held in Glasgow between 31 October 2021-12 November 2021. It brought parties together to accelerate action towards the goals of the Paris Agreement and the UN Framework Convention on Climate Change.

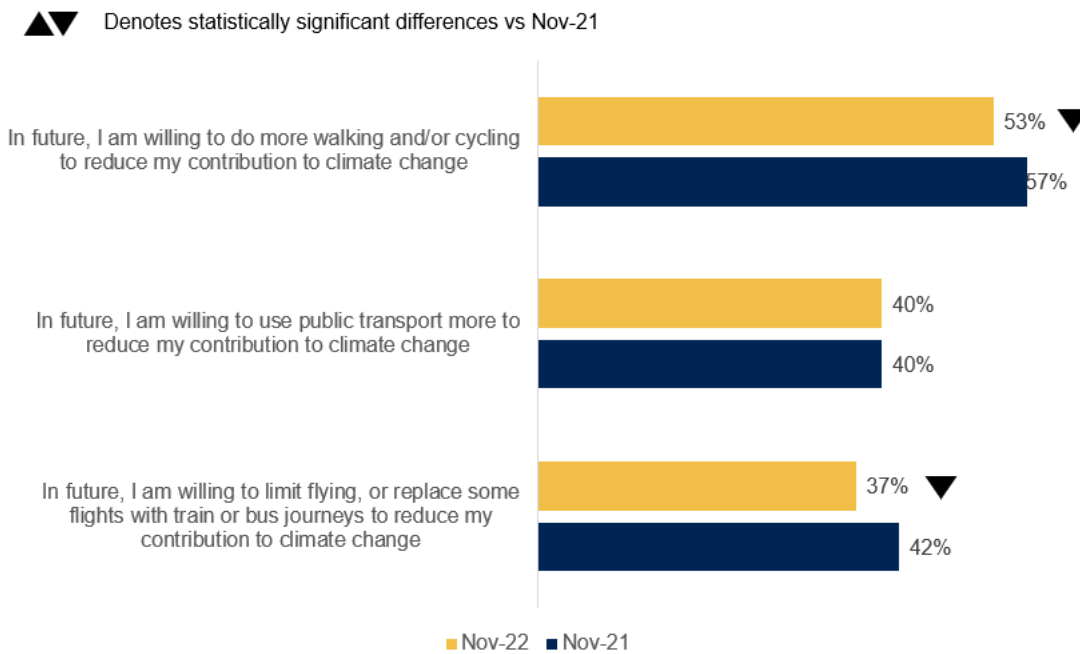
¹³ The Ipsos Issues Index records the issues people spontaneously identify as the most important issues facing the country, surveying c1,000 adults across Britain every month.

Figure 6.1 shows the proportion of people who agreed with a set of statements about their attitudes towards sustainability and the actions they intended to take in the future in November 2022 compared to November 2021.

In November 2022, a significant proportion of people said they would travel sustainably in order to reduce their own personal contribution to climate change – however, there was a reduction in the proportion of people willing to take some actions between November 2021 and November 2022.

There was a five-percentage point reduction in the proportion who agreed they would be willing to limit their flying in the future or replace some flights with train or bus journeys to reduce their contribution to climate change; this fell from 42% to 37%. There was a similar sized reduction in agreement with being willing to walk and/or cycle more in the future which fell from 57% in November 2021 to 53% in November 2022. However, people were as likely to have said they would be willing to use public transport in the future to reduce their contribution to climate change in November 2022 as they were in November 2021; this remained unchanged at 40%.

Figure 6.1: % agreed with selected statements - November 2021 vs. November 2022



Source: Ipsos /DfT, Base: 2,345 adults in England, 15th November-21st November 2022; 2,267 adults in England, 4th November-29th November 2021

Q23. To what extent do you agree or disagree with each of the following statements?...

In line with November 2021, in November 2022, six in ten (62%) agreed that they would like to do more walking and/or cycling for pleasure/exercise, 40% agreed and 22% *strongly* agreed. The appetite for doing this was equally strong among those who reported having been reliant on travelling by car in November 2022 and those who weren't; 65% and 68% respectively. More than half, 54%, of those who *hadn't* walked to make essential journeys agreed, as did 75% of those who had.

In focus group discussions, participants who walked regularly to make journeys commented on the positive physical and mental health benefits of doing this. They also often described how they had become more aware of their health and lifestyle during the pandemic.

“I’ve got rid of my vehicle, and my wife has the car. Instead, I walk my daughter to school every day. We walk a mile there, and then I walk a mile back with the dog and then the same again in the afternoon...Apart from the environmental and the cost thing since getting rid of the car, I’m getting healthier as well.”

*Participant making at least 4 journeys each week by train
(focus group 10)*

6.2 Who was most willing to travel sustainably?

People aged 16-34-years-old were more likely than average to have said they would be willing to take action to reduce their contribution to climate change in the future. As Table 6.1 shows, this age group were more likely than average to have said they would limit their flying or replace some flights with train or bus journeys, to use public transport more and use cars less. Those in social grade ABC1 households were also more willing than average to take some actions to reduce their contribution to climate change.

Table 6.1: % 16-34-year-olds and those in ABC1 households who agreed with selected statements

(* denotes statistically significant vs all adults)

	All adults (average)	16-34	ABC1
‘...do more walking and/or cycling...’	53%	56%*	58%*
‘...limit flying, or replace some flights with train or bus journeys...’	37%	45%*	42%*
‘...use public transport more...’	40%	49%*	42%*
‘...use cars less...’	42%	50%*	46%*

Source: Ipsos /DfT, Base: 2,345 adults in England, 15th November-21st November 2022
Q23. To what extent do you agree or disagree with each of the following statements?

6.3 What might encourage people to travel more sustainably?

The *All change?* programme of research found that convenience, comfort and cost, underpinned by habit, were the most important factors influencing travel decisions and that the environment was not especially salient. The reasons why many people reported not travelling more sustainably included the relative convenience, comfort and cost-effectiveness of driving, as well as several barriers to active travel for some groups and locations. This included a sense that there was insufficient infrastructure and a range of safety concerns associated with walking and cycling.

Other research by Ipsos has found that the public support pro-sustainability policies when they are outlined initially, but support falls dramatically when people are presented with the possible lifestyle and financial cost implications for them personally.¹⁴ Similarly, while focus group participants in November 2022 said that they hear more about the environment than they used to, there was a sense that this had not had any significant impact on their thinking or behaviour in respect of travelling. Participants felt that there would likely be little or no change in their day-to-day behaviour until travelling more sustainably became cheaper and as convenient as current alternatives.

“Anything ‘eco’ is at the bottom of my list at the moment because it has a price premium attached to it. For me, your pocket trumps everything. It’s not that I’m anti-environment, it’s just that anything that’s good for the environment is bad for your pocket.”

*Participant currently working from home on at least 3 days in each week
(focus group 2)*

Despite this sentiment, there was still an appetite from participants to learn more about how they could help to reduce their impact on the environment through travelling. They were particularly keen to have access to information which showed the environmental impact of travelling in one way versus another. However, they acknowledged that this information would likely be unused unless it was shared in places that they already go to, e.g. Google Maps or other highly-used travel apps, or around the local environment. It was also important that the information shared was easily comprehensible and felt relevant to their lives.

There were some differences in views and favourability towards electric vehicles. Some participants saw provision of charging infrastructure in their local area as sporadic which signalled to them that use of electric vehicles was not a priority. There were also concerns around the environmental and ethical impact of sourcing materials for electric vehicle technology (e.g. lithium/cobalt) and the longevity and sustainability of these processes.

There was a sense that increases in electricity prices would raise the running costs of electric vehicles, and some awareness of the announcement of the introduction of road tax on electric vehicles from 2025. This contributed to scepticism that ‘going electric’ would provide financial benefit in the future. However, another group of participants felt that electric vehicles continued to be the best ‘next step’ and in line with future trends. This sentiment was particularly strong among higher income participants.

Participants across focus groups and depth interviews shared a view that while they were willing to make changes beneficial for the environment that did not impact on cost or convenience, responsibility for behaviour change across society did not lie with individuals. Instead, they felt that bolder moves from government and the private sector would signal that travelling more sustainably was a more urgent and serious priority. Until the financial benefits of travelling more sustainably outweighed those offered by travelling in other ways, it was thought to be unlikely that decisions made about travelling would change.

¹⁴ <https://www.ipsos.com/en-uk/uk-public-still-broadly-supports-most-net-zero-policies>

“I don't think there is a place you can go to find out what the environmental cost of doing a particular journey is. If I wanted to drive down to Brighton, what would be the least environmentally impactful way of doing that?”

*Participant reliant on travel by car more than any other form of transport
(focus group 6)*

“I think I'd like to see, for example if you said what journey you took specifically, and then compared that against another version of your journey, then it could give you some kind of emissions breakdown or energy usage to see what the cost of that journey is. That would be interesting.”

*Participant reliant on buses/public transport more than any other form of transport
(focus group 7)*

Appendix

Our Changing Travel - November 2022 - survey methodology

The November 2022 survey involved 2,345 respondents aged 16-75 in England only, with the sample drawn from the Ipsos online panel. This included booster samples amongst two groups to enable robust analysis - ethnic minorities (resulting in a total sample size of 476), and those living in the North East region (a total of 248).

As part of the analysis for this report, the data from previous *All change?* surveys have been filtered on England-only respondents to allow like-for-like trend comparisons. Unlike the original *All change?* surveys which were based on a longitudinal design (see below), the November 2022 survey was entirely cross-sectional meaning that we were unable to track the behaviours of specific respondents over time.

Despite this change in sampling approach, and because the *All change?* surveys and the November 2022 survey *all* involved the production of representative samples of the population via online survey methodologies, it is reasonable to treat them as comparable.

As with previous surveys, data generated by the November 2022 survey were weighted to the known population profile by age, gender, working status, ethnicity and social grade.

Survey fieldwork dates, Coronavirus restrictions and reference periods

As shown in Table 1, fieldwork was undertaken between 15-21 November 2022 in England.

The *All change?* research programme involved a survey and qualitative research, designed in response to the COVID-19 pandemic to measure and explore the reasons for transport and travel behaviour¹⁵. Findings from waves 1 and 6 are referenced in this report.

Table 1: Survey waves and fieldwork dates

Survey	Fieldwork dates
<i>All change? Wave 1</i>	15-22 May 2020
<i>All change? Wave 6</i>	4-29 November 2021
Our Changing Travel November 2022	15-21 November 2022

¹⁵ <https://www.gov.uk/government/publications/covid-19-travel-behaviour-during-the-lockdown>

Several important developments occurred between the surveys. These are summarised in Table 2 below:

Table 2: Survey waves and restrictions/context during reference periods

Survey	Summary of reference period and restrictions/context
All change? Wave 1	The four weeks prior to wave 1 fieldwork coincided with the first UK-wide lockdown.
All change? Wave 6	A period following the lifting of all legal limits to social contact; there was media coverage of rising case numbers and what became known as the Omicron variant towards the end of fieldwork.
Our Changing Travel November 2022	No restrictions in place – legal requirement to self-isolate removed in February 2022.

Modes of transport

The survey covered the following modes (some of these are abbreviated within our commentary). These were presented to respondents at the first question in the survey (and at subsequent questions). To note, 'car as a passenger' was not defined any further but did sit separately from taxi and shared transport modes.

- Car as a driver
- Car as a passenger
- Van/lorry
- Motorbike/moped
- Informal car-pooling (e.g. individuals that know each other and share a similar journey route)
- Car club (e.g. ZipCar, Co-wheels) or ride-sharing apps (e.g. liftshare.com, blablacar.com)
- App-based minicab services e.g. Uber
- Taxi/black cab/minicab/private hire
- Bus
- Coach
- Aeroplane/flying
- Ferry/other water-based transport
- Train
- Tram
- Underground rail/metro
- Cycling (including e-bike)
- Walking all the way to a destination or wheeling by a wheelchair or motorised scooter

Interpretation of survey data and statistical reliability

For the November 2022 survey, we can expect an overall sampling tolerance of +/- 2.0 percentage points for a 50% finding at the '95% confidence interval'. This will vary for sub-groups and geographies according to their sample sizes. Our commentary on changes in behaviour between waves and among groups and geographies focuses on statistically significant changes and differences only.

Where percentages do not sum to 100 this may be due to multi-code responses or rounding. This is also the case in terms of combinations not summing to their constituent parts - e.g. the percentage who agreed they found it difficult to choose the most suitable ticket when travelling by public transport summing to the percentage who said they were agreed strongly and the percentage who said they tended to agree.

Qualitative research and interpretation

Ipsos conducted 10 online focus group discussions and 15 in-depth qualitative interviews exploring how a range of people in England made decisions about travelling. Fieldwork for 10 focus groups took place between 21st November and 1st December 2022. 15 in-depth interviews were then conducted between 8th to 17th February 2023.

Qualitative research is illustrative, detailed, and exploratory. It offers insight into the perceptions, feelings, and behaviours of people. The insights and verbatims presented in the report are intended to demonstrate the views and experiences of the target sample and the reasons for their behaviour, and not to be a statistically representative sample of the wider population.

Throughout the report, we indicate findings from the qualitative research by referring to 'participants' and from the survey by referring to 'respondents'.

Online focus groups

Participants for the online focus groups were recruited via free-find methods and telephone recruitment via an external recruitment partner. There were 6 participants on average who attended each 90-minute focus group, with a total of 57 taking part across all 10 groups. Conversations with participants were structured by a discussion guide covering several topics in line with the original research objectives. The topics covered included:

- Current travel behaviours (all groups)
- Use of cars (only groups 4, 5 and 6)
- Use of public transport (only groups 3, 7, 8, 9 and 10)
- Potential impacts of cost of living on travel (all groups)
- Current levels of concern around respiratory illnesses (all groups)
- Working patterns (all groups)
- Future intentions around transport and travel (all groups)
- Attitudes toward sustainable travel (all groups)

All 10 focus groups were conducted online via Zoom and audio recorded solely for notetaking purposes with consent from all participants. The groups were recruited with targets to achieve a mix of standard demographics such as parents and non-parents, gender, age, ethnicity, socio-

economic grade and region. Table 3 below provides a further breakdown of the participants recruited within each focus group.

Table 3: Focus group sampling

Group	Travel behaviours
1	Participants currently working from home at least 3 days in each week
2	Participants currently working from home at least 3 days in each week
3	Participants not able to work from home and commuting to work using public transport only
4	Participants not able to work from home and commuting to work using cars only
5	Participants reliant on cars more than any other form of transport
6	Participants reliant on cars more than any other form of transport
7	Participants reliant on buses/public transport more than any other form of transport
8	Participants reliant on buses/public transport more than any other form of transport
9	Participants making at least 4 separate short or long-distance journeys each week using a national rail train service (i.e. could include individuals commuting to work and back twice a week)
10	Participants making at least 4 separate short or long-distance journeys each week using a national rail train service (i.e. could include individuals commuting to work and back twice a week)

In-depth interviews

All 15 in-depth interviews followed a semi-structured discussion guide and ran for 45 minutes, while being conducted via telephone or MS Teams. The depth interviews were designed to:

- Understand why those who report increasing the amount they carpool informally over the past six months have done this, as well as their experiences of doing so and their future intentions.
- Understand the experiences of those who now work from home part of the week (and did not do so prior to the pandemic) and commute to their place of work for the remainder, focussing on how this has affected their travel behaviour and wider lifestyle, and the extent to which they expect these routines to change (or not) in future.
- Understand how recent cost increases have affected the travel behaviour of those who are struggling financially, including the extent to which changes that have been made are seen as temporary vs. permanent.

To achieve these aims, 15 participants were recruited by free-find methods and telephone recruitment via an external recruitment partner. Quotas were set to recruit an even mix of genders, ages, social grade and location. More specific quotas were implemented to include a minimum of 6 ethnic minority participants across the sample. Table 4 below lays out the 3 profile groups of interests that were recruited for the in-depth interviews.

Table 4: In-depth interviews – sampling

	Quota set	Commuting behaviour
1	x5 participants	Those who report increasing their frequency of informal car pooling and who do this at least once a week (For the purposes of this study, informal car pooling is defined as: <i>Individuals from more than one household sharing a car journey, who know each other and who share a similar journey route</i>)
2	x5 participants	Those who work from home at least twice per week and who didn't work from home at all before the pandemic
3	x5 participants	Those who state their decisions about weekly travel have been somewhat or strongly impacted by the cost of living in the last 6 months, who state they are somewhat or really struggling on their current household income and who have fallen behind on at least one payment in the last 6 months (e.g. mortgage, credit card, utilities etc.)

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ISO 9001

This is the international general company standard with a focus on continual improvement through quality management systems. In 1994, we became one of the early adopters of the ISO 9001 business standard.



ISO 27001

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