
Young People's Travel - What's Changed and Why? Review and Analysis

The Centre for Transport & Society, UWE Bristol* &
Transport Studies Unit, University of Oxford†

* Kiron Chatterjee, Phil Goodwin, Ben Clark, Juliet Jain, Steve Melia and Miriam Ricci
† Tim Schwanen, Jennie Middleton, Anna Plyushteva, Georgina Santos and Gordon Stokes

Executive Summary

January 2018

Young adults in Great Britain and other countries are driving less now than young adults did in the early 1990s. The Department for Transport (DfT) commissioned the Centre for Transport and Society (UWE, Bristol) and the Transport Studies Unit (University of Oxford) to carry out a systematic assessment of available evidence on the subject, both by review of UK and overseas published literature, and by new secondary analysis of existing UK data sets. The study sought to address the questions:

- In what ways have changes in young people's social and economic conditions, and lifestyles and attitudes impacted on their travel behaviour?
- How might those drivers, or other anticipated changes, be expected to impact their future travel demand?

The evidence has been evaluated on the basis of an extensive review of both transport-specific and wider social science literature in the UK (and other countries where, despite national differences, the trends show many similar patterns), and new analysis of data from the National Travel Survey (NTS) (1995-2014), the Census (2001 and 2011) and Understanding Society (five waves from 2009/10 to 2013/14).

'Young people' were defined for the purposes of this study as those aged 17-29. It was also important to consider what happens to young people as they pass 30, and enter their 40s and even 50s, to see if there is any evidence that differences persist over time as they get older. The original motivation for the study was the observation of changes in car use, and much of the available evidence focuses on this, but consideration is also given as far as practical to changes in public transport use, walking, cycling and total travel. The period considered was from 1990 to the present day.

The sustained decline in car use among young adults

The trend for young adults to drive less than previous generations began approximately 25 years ago, starting with older members of the Generation X birth cohort and building up with the Generation Y / Millennial birth cohort and possibly continuing with the Generation Z / post-Millennial birth cohort. This is in contrast to Baby Boomers, born from 1946 to 1964, who were the spearhead of a rapid, prolonged and persistent growth in driver licence holding, car ownership and car use, which can be considered among the most important social trends in the UK from the 1960s to 1980s.

Driving licensing among young people peaked in 1992/4, with 48% of 17-20 year olds and 75% of 21-29 year olds holding a driving licence. By 2014, driving licence holding had fallen to 29% of 17-20 year olds and 63% of 21-29 year olds. Between 1995-99 and 2010-14 there was a 36% drop in the number of car driver trips per person made by people aged 17-29, with a fall of 44% for men and 26% for women. The difference in the amount of car driving between young women and young men became negligible by 2010-14. Young people generally travel less now, with the total number of trips per person made by young men falling by 28% between 1995-99 and 2010-14, whilst the number of trips made by young women fell by 24%. There has been a small increase in the number of trips per person on public transport. The number of walking trips per person has fallen whilst the number of cycling trips per person has remained broadly constant. As young adults have moved into their thirties, the proportion with driving licences and the amount they drive has increased, but not so much that their car use has caught up with that seen in previous cohorts. Although there has been variation from year to year, the general trend has been for each cohort of young people since the early 1990s to own and use cars less than the preceding cohort, and for the growth in car use with age to also be at a lower rate. This suggests that their changing behaviour is more than just a postponement of driving.

Evidence from published literature

Earlier studies seeking to explain the differences in travel behaviour between Millennials and previous cohorts of young people have shown that these are partly explained by differences in life circumstances (in terms of demographics, living situation and socio-economic situation). For example, the lower full-time employment rates of Millennials explain some of the differences in travel behaviour. However, differences in life circumstances do not explain all of the observed differences - there are unexplained cohort effects. These could include differences in life circumstances which have not been captured in the studies (for example, the increase in low-wage, uncontracted jobs), but they could also include other factors.

Motoring costs have become a more significant factor discouraging driving amongst young people. Young people have seen stagnation in wage rates, increases in housing expenditure and a decline in disposable income that have not been experienced by older adults. In interviews, young people have often stated that the high costs of motoring, especially insurance costs, have discouraged them from learning to drive. There is also evidence of changes in the values and attitudes of young people. Surveys and interviews have shown that many young people accept not driving. It is unclear whether this reflects a generational shift in attitudes towards driving meaning that it is no longer considered desirable to drive by many young people, or that other changes mean that driving is no longer essential at this stage in life.

There has been much attention to increased use of Information and Communication Technologies (ICTs) in everyday life, although not yet a full picture of how this has affected travel behaviour. Effects have been noted which are in contradictory directions. However, this remains a plausible contributor to the fall in total travel by young people.

New secondary data analyses

Analysis of National Travel Survey time-series data for residents of England found large increases in time spent at home for men aged 17-29 (increase of 80 minutes per day) and for women aged 17-29 (increase of 40 minutes per day) between 1995 and 2014. Long-term change in the nature of employment and increasing use of ICTs are likely candidates to explain the trends.

Analysis of Census data for commuters in England for 2001 and 2011 provided evidence of substantial change in the commuting behaviours of 25-34 year olds, attributable to their living in more highly urbanised areas and this having a greater impact on their commuting choices than previously seen, with greater use of public transport.

Analysis of 'Understanding Society' data found that for young people being in full-time employment, or gaining employment, was strongly linked to then obtaining a driving licence. Stable employment across multiple years was a strong determinant of becoming a car driver. Forming a partnership was also positively associated with being a car driver. However, young people living with their parents were no less likely to be car drivers than people living alone or sharing with other adults - as such, the greater number of people living with their parents is unlikely to be a major factor leading to young adults driving less. This analysis provides strong evidence to support the hypothesis that the fall in Generation X's and subsequent cohorts' car use relative to previous cohorts has been influenced by a long-term increase in the age at which people typically start working, begin relationships and have children.

Conclusions on the influence of societal trends and lifestyle changes on travel behaviour

The study has examined how demographic change, along with changes in the living and socio-economic situations of young people have influenced their travel behaviour. It has also examined the role of changes in young people's values and attitudes, and use of Information and Communication Technologies, such as smartphones. Finally, the direct influence of the transport system has been considered.

The evidence indicates that the causes of the changes in young people's travel behaviour lie largely outside transport. Changes in travel behaviour have been driven by changes in young people's socio-economic situations (increased higher education participation, rise of lower paid, less secure jobs and decline in disposable income) and living situations (decline in home ownership and re-urbanisation). These are long-term changes that predate the 2007-8 global economic crisis and subsequent recession. Closely tied to the changes in young people's socio-economic and living situations are changes in when people start a family, their social interactions (substituting face-to-face interaction with digital communication, for example) and the importance that people attach to driving. With the current evidence base it is not possible to quantify the importance of each of these factors or to say the order in which they began to exert an influence. They should be treated as interconnected phenomena.

The concept of a delayed transition, or even non-transition, into a traditional form of 'adulthood', marked by completing a course of education/training, leaving the parental home to live independently, getting a job, getting married and then having children, serves as a useful basis for considering the combined set of societal changes because it has been shown that car use is strongly associated with these markers of adulthood. However, it is important to explore the extent to which this 'delayed adulthood' has been a matter of choice or the consequence of constraints imposed by changes in labour and housing markets.

Changes in transport conditions have also played a role. There is good evidence that young people have been deterred from driving by high costs (especially car insurance costs). Reductions in driving and increases in public transport use have occurred to the greatest extent in London and other areas with high population density, where alternatives to driving are more readily available and there are greater constraints on driving. This demonstrates that transport policies and investments can shape long-term trends - although interventions in other policy areas (such as housing and employment) may be more influential in shaping young people's travel behaviour.

Future travel demand

When not only the speed but also the direction of social trends change, it is inevitable that there is greater uncertainty about the future. This report shows that changes in choices in early adulthood have long-term implications: the lower car use of young adults seen in the early 1990s is still seen in this cohort who are now in their forties. Those who start to drive later tend to drive less when they do start. Our expectation is that a modest change towards greater car ownership (or leasing) and use can be expected in the next 10-15 years for Millennials, although possibly only for those who secure stable, full-time employment. It thus seems reasonable to assume that the difference in travel behaviour between those born before and after the early 1990s will be smaller at age 40 or 50 than it was at age 20 or 30. However, given that many young people have become accustomed to a lifestyle in which private car use is less central than it has been for previous generations, it is also likely that significant differences in travel behaviour will remain throughout their lives (representing a long-term cohort effect).

There are reasons to believe that this cohort effect is also likely to apply to the lives of subsequent cohorts. There is currently little evidence to suggest that the travel behaviour of the post-Millennial generation will be very different from those born in the 1980s and 1990s. If this is the case, what started as a cohort effect for Generation X and built up to the Millennials will become established as the new norm and represent an age effect where the development of travel behaviour over the life course differs for future generations from that which was seen prior to 1990.

It is important to recognise the new realities of the lives and travel behaviour of young adults when attempting to predict future transport use. In 2010-14, only 37% of 17-29 year olds reported driving a car in a typical week, whilst the figure was 46% in 1995-99. When forecasting future travel demand, it is important to be aware of the extent and pattern of car access within the population. There is a lack of data on the use of emerging transport options (shared mobility in particular) and it will be important to adapt survey and monitoring instruments to understand how these options are perceived and used by different age groups. There is the need to develop approaches that can generate scenarios for future travel demand which account for cohort differences in travel behaviour.

It is possible that the changes in young people's travel behaviour described above are the first phase of a social change that will continue through successive generations. The speed of that change is likely to be affected by the combined influence of: changes in the structure of the labour market and security of employment; urbanisation and land use; housing availability, location and tenure; career expectations; and demographic and taxation factors that affect how wealth moves between generations. Further, such social change is also likely to be affected by the interaction of all of these with: household formation; marriage and parenthood; and the specific ways in which new technologies are adopted by different groups. As a result, trends in behaviour do not necessarily instantly or simply reverse if *some of* the causal factors reverse. New habits are formed, and can be long lasting, as a response to, and influence on, these structural changes.

It is, therefore, difficult to envisage realistic scenarios in which all these future uncertainties combine in such a way as to re-establish earlier levels of car use. Growth in incomes, including amongst young adults, is widely assumed to resume in the long term. However, given the social change that has been taking place, this scenario would not necessarily lead to a return to the same level of car use among young adults as we have seen in older generations. Other structural changes have taken place and it is important to recognise their influence in travel demand forecasting alongside the uncertainties in macro-economic factors.