Department for Transport

Our Changing Travel: 2023

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Department for Transport
Great Minster House
33 Horseferry Road
London
SW1P 4DR

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Any enquiries regarding this publication should be sent to us at www.gov.uk/government/organisations/department-for-transport

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Executive summary

In 2023, the Department for Transport (DfT) commissioned research into post-pandemic transport trends. The study aimed to understand how and why people were changing how they travelled (if at all), the effect of trends influenced by the pandemic (the cost of living, sustainable travel, the growth of the digital economy, lifestyle changes) on people's travel choices, and the barriers and enablers to public transport use.

The research involved an online survey 3,732 people aged 16-75 from England. Data was weighted to be representative of the population in England. This study builds on work conducted during and immediately after the Covid-19 pandemic. We can understand how behaviours and attitudes have changed by comparing findings across these surveys.

Key Findings

Travel changes between November 2022 and November 2023

This research found **how respondents travelled** in November 2023 was broadly consistent with November 2022. Walking and using cars remained the most commonly used modes, followed by buses and trains. Most respondents had used public transport.

The **frequency with which modes were used changed**, however. Walking to a destination increased and there were small decreases in the proportions of people using cars, taxis/black cabs, cycling and informal car-pooling, trams, coaches, car clubs, and motorbike/mopeds. Use of buses, trains, underground rail/metro and app-based minicab services was unchanged.

Why people travelled – their journey purpose – also changed slightly. While the reasons people travelled in November 2023 were consistent with November 2022, a larger proportion of respondents travelled to go shopping for food/grocery items, visit friends and relatives, to travel to a place of work, to access services and to access entertainment/arts.

Factors influencing travel choices

This research suggests that **cost-of-living pressures** strongly influenced travel choices. A third of respondents indicated it was difficult or very difficult to cope on their present incomes. A majority had taken actions to reduce how much they spent on travel or transport in the three months before taking part in the research, with the most common actions being walking more, combining trips and cutting back on non-essential journeys.

The effect of other factors such as the growth of the digital economy, changing working patterns, and concerns about sustainability are less observable in our data, but are likely to have influenced choices. For example, the sustained **growth of the digital economy** will have enabled some homeworking for some workers, while respondents' decisions to access goods and services online will have enabled some trips to be avoided.

Similarly, while the overall rate at which people **travelled to their place of work** was unchanged, a larger proportion of people in full- or part-time employment went to their place of work 5 days a week or more in November 2023 than in November 2022.

Attitudes towards the environment and sustainability appeared to have played less of a role in respondents' travel choices in November 2023 than in November 2022. Although between a third and a half of respondents were willing to walk more, drive less, use public transport more or limit flying to reduce their contribution to climate change, willingness for most of these behaviours was lower in November 2023 than in November 2022.

Barriers and Enablers to using public transport

Public transport has social, financial and environmental benefits. However, the choice to use public transport is complex; not all journeys are seen as feasible on public transport.

This research found that while most respondents lived near public transport infrastructure (e.g., a bus stop or train station), many had not used this infrastructure. Those who had used public transport tended to be younger, while non-users tended to be older.

Barriers and enablers to public transport use include the proximity of infrastructure and accessibility of modes, the cost of public transport, the reliability of services, and, for some, concern about illness and infection.

Most **respondents identified several ways they could be encouraged to use public transport**. One in eight (14%) respondents stated nothing would encourage them to travel by public transport more or indicated they would not travel by public transport.

The top five selected options to encourage public transport use (each selected by between 18% and 28% of respondents) were financial incentives (e.g., cheaper fares), services which run on time, improved connections in the areas people live/need to go, more frequent services and fewer cancellations or changes to services. Given cost of living pressures, disruption to services due to industrial action and the need to have services to destinations for public transport to be an option, these suggestions are unsurprising.

Less frequently selected options to encourage public transport use (each selected by between 6% and 12% of respondents) were less risk of disruption due to unexpected events, financial incentives to travel at quieter times, better options to travel at quieter times, better ventilation, roads being busy/congested, more flexible season ticket options, employers allowing more flexible start/finish times, free travel for school-aged children and up-to-date information on crowding.

Introduction

Background

The Department for Transport (DfT) undertakes research to better understand how people are making decisions about how to travel. In 2023, the DfT commissioned Ipsos to conduct a follow up study to "Our changing travel: how people's travel choices are changing" (OCT1; 2022) and address four research questions:

- how and why are people changing how they travel (if at all)?
- how do people anticipate working and shopping in future, and what could this mean for transport choices?
- what are people's attitudes and behaviours relating to sustainable travel, and what could this mean for decarbonisation?
- what are the barriers and enablers to people using public transport?

This wave of research - Our Changing Travel 2 (OCT2) - focused on the role played by three factors, accelerated or impacted by the pandemic, that may influence transport behaviours: changes to the cost of living; lifestyle changes (including the growth of the digital economy and home working); and, public attitudes towards the environment and sustainability.

Methodology

Ipsos conducted an online survey of 3,732 people aged 16-75 in England. Data was collected through Ipsos's i-Say ('Access') online panel, a non-random probability survey panel. Data was weighted to be nationally representative of the population of England. Fieldwork ran between 17-29 November 2023.

The research builds on previous research commissioned by the DfT: OCT1 in 2022 and the All Change? Travel Tracker series of surveys in 2020-21. The OCT2 survey mirrored questions used during OCT1, to allow robust comparisons between waves, with questions added to explore new areas of interest. 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. Significance testing should be seen as indicative as the sample is drawn from a non-random probability sample. All differences mentioned in this document are statistically significant on this basis, unless otherwise stated.

Report structure

The report has the following chapters:

1. **Chapter 1: How did travel behaviour change between November 2022 and November 2023?:** In this chapter, we provide a high-level description of changes in mode use and journey purpose between 2022 and 2023 and look at whether particular modes are associated with particular journey purposes.

2. **Chapter 2: What is influencing travel choices?:** In this chapter, we consider factors which may influence whether and how people travel, with a particular focus on cost of living changes, people's lifestyles and attitudes towards sustainability.

3. **Chapter 3: What are the barriers and enablers to using public transport?:** In this chapter we describe who uses public transport, and what makes it easier or more difficult to choose public transport.

4. **Annex 1: Technical Report:** This annex provides further detail on this study's methodology.

Please note, not all questions asked in the survey are included in this report. The full results are available in the accompanying data tables [LINK].

Chapter 1: How did travel behaviour change between November 2022 and November 2023?

Chapter Summary:

Mode use

- How people travelled in November 2023 had changed little from November 2022.
- The most common modes for journeys in November 2023 were: walking all the way to a destination (77%), car as a driver (75%), car as a passenger (67%), bus (49%) and train (41%).

Journey purpose

- The most common reasons why respondents travelled in November 2023 were: shopping for food/groceries (77%), visiting friends/relatives (59%), shopping for non-grocery items (46%) and travelling to a place of work (43%).
- Journeys for these four purposes had increased by three to four percentage points when compared to November 2022.

This chapter provides a high-level description of changes in mode use and journey purpose between November 2022 and November 2023.

The research found that most modes' use in November 2023 was in line with November 2022, albeit with increases in the proportion of respondents walking, slight decreases in car use and small decreases in less commonly used modes. Respondents' most common reasons for travelling - their journey purposes - were broadly unchanged.

Mode use

How did people travel in 2023?

Respondents were asked how frequently, if at all, they had used different modes of transport in the four weeks before participating in the research (in November 2023). Respondents were classified as users of a mode if they had made a journey using a mode at least once in that period.

The most common way respondents travelled in November 2023 was by walking. Three-quarters (77%) of respondents walked all the way to a destination in the four weeks before the survey.

The next most common way people got to a destination was by private car. Three-quarters (75%) got to a destination by using a car as a passenger, while two thirds (67%) got to a destination by using a car as a driver.

Public transport options were the next most used modes. Half (49%) of respondents had used a bus. Two in five (41%) had used a train.

Modes used less commonly, but still by between one in five and one in four respondents, were:

- taxis/black cabs (28%);
- underground/metro services (27%);
- app-based mini-cab services (26%);
- cycling (20%), and;
- informal car sharing (17%).

The least commonly used modes were typically used for work purposes or associated with occasional journeys (e.g., going on holiday). Modes used by between one in ten and one in twenty respondents included van (13%), aeroplane (12%), motor bike/moped (9%), e-scooter (8%), ferry (7%) and, lorry/HGV (6%).

How did mode use change between November 2022 and November 2023?

There were some changes in mode use between November 2022 and November 2023, although in most cases these changes were modest (see Figure 1).

Figure 1 Change in mode use, November 2022 and November 2023

	November 2022	November 2023	Percentage Point Change
Walking all the way to a destination	68%	77%	+ 9 *
Car as a passenger	77%	75%	- 2 *
Car as a driver	71%	67%	- 4 *
Bus	48%	49%	+ 1
Train	43%	41%	- 2
Taxi/black cab/minicab/private hire	33%	28%	- 5 *
Underground rail/metro	29%	27%	- 2
App-based minicab services e.g., Uber	27%	26%	- 1
Cycling (including e-bike)	26%	20%	- 6 *
Informal car-pooling	21%	17%	- 4 *
Tram	17%	12%	- 5 *
Coach	17%	12%	- 5 *
Car Club	15%	10%	- 5 *
Motorbike/moped	14%	9%	- 5 *

Q1/1a 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. BASE 2023: All respondents (n=3,732); BASE 2022: All respondents (n=2,345). **Figures marked with an asterisk are statistically significant. Modes for which there are no year on year comparisons have been excluded from the table.*

Walking was the only mode where use increased in this period. However, this may be due to a methodological change in how respondents were asked about whether they walked or wheeled (e.g., using a wheelchair) all the way to their destination in November 2023, compared with November 2022. In 2022 respondents were asked if they had personally made a journey by "Walking all the way to a destination or wheeling by a wheelchair". In 2023 respondents were asked about these modes separately.

There were slight decreases in car use as a driver (down four percentage points from 71% to 67%) and car use as a passenger (down two percentage points from 77% to 75%). There were also decreases in taxi/black cab use (down five percentage points from 33% to 28%) and cycling (down six percentage points from 26% to 20%).

Bus, train, underground and app-based minicab service use in November 2023 was in line with November 2022.

There was a nine percentage point increase in walking all the way to a destination in November 2023, compared to the same period in November 2022.

Journey purposes

Why were people travelling in November 2023?

Respondents were asked what types of journeys they had undertaken in the four weeks before participating in the research in November 2023. They were not asked how frequently they had undertaken these types of journeys.

The most common reasons respondents travelled in November 2023 were:

- shopping for food/groceries (77%);
- visiting friends/relatives (59%);
- shopping for non-grocery items (46%); and,
- travelling to a place of work (43%).

These could be considered essential or less discretionary journeys.

The next most common journey purposes were:

- to pubs, bars or restaurants (39%);
- to medical, hospital or dentist appointments (34%);
- for recreation/to keep fit (32%);
- to access services (31%);
- to go on a day trip (30%);

- to access entertainment/the arts (28%); and,
- to run errands for people (25%).

There was a lower incidence of journey purposes likely associated with particular sub-groups of respondents (e.g., those responsible for caring for children, those in employment who make business trips) and seasonal effects (October/November is not typically a time of year in which people take holidays). For example, 19% reported giving lifts to friends and family (other than school or education), 18% reported picking up or dropping children to school/education and 12% reported going on holiday.

The overall rates at which people were undertaking different journey purposes in November 2023 were, in most cases, consistent with those in November 2022 (Figure 2). There were, however, increases in the proportions of people travelling to shop for food/grocery items (an increase of 4 percentage points), to visit friends and relatives (an increase of 3 percentage points), to travel to a place of work (an increase of 4 percentage points) and shopping for non-grocery items (an increase of 3 percentage points).

Figure 2 Change in journey purpose, November 2022 and November 2023

	November 2022	November 2023	Percentage Point Change
Shopping for food/grocery items	73%	77%	+ 4 *
Visiting friends/relatives	56%	59%	+ 3 *
Shopping for non-food/grocery items	43%	46%	+ 3
Travelling (commuting) to place of work	39%	43%	+ 4 *
Going to a pub/bar/restaurant	37%	39%	+ 2
Travelling to medical, hospital or dentist appointments	32%	34%	+ 2
For recreation/keeping fit	32%	32%	+/- 0
Travel to access services e.g., hairdressers, libraries	28%	31%	+ 3 *
To go on a day trip somewhere	30%	30%	+/- 0
Travelling to access entertainment/arts	26%	28%	+ 2 *
Running errands for people	25%	25%	+/- 0

Figure 2 Continued: Change in journey purpose, November 2022 and November 2023

	November 2022	November 2023	Percentage Point Change
Giving lifts to friends and family for other reasons	20%	19%	- 1
Picking up or dropping off child(ren) at school/nursery etc.	18%	18%	+/- 0
To go on holiday	12%	12%	+/- 0
Business travel	10%	11%	+ 1
Travelling to education yourself	8%	9%	+ 1
Other journey purpose	1%	1%	+/- 0

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. BASE Nov 2023: Any respondents who have made a journey in the past 4 weeks by any transport mode (n=3,713). BASE 2022: Any respondents who have made a journey in the past 4 weeks by any transport mode (n=2,327). Figures marked with an asterisk are statistically significant.*

Associations between modes and journey purposes

How were journeys made?

Respondents were asked what modes of transport they used when making the journeys they had undertaken in the four weeks before taking part in the research. Respondents could indicate they had used more than one mode for journey purposes.

Cars

Private cars used by drivers (as opposed to passengers) were the most used mode for most journey purposes. Over half of respondents who had indicated they had made journeys to a place of work (58%), shopping for food / grocery items (55%) and visiting friends and relatives (52%) had driven.

Cars were also by far the most commonly used mode for transporting other people - eight in ten (83%) journeys to give lifts to friends and family and six in ten journeys to pick up or drop off children at a place of education (64%) or running errands for people (58%).

For other journey purposes, cars were typically used on between a third and a half of journeys. An exception to this were journeys to a place of education as either a pupil or student, where they were used on just 16% of journeys.

Other modes

Apart from journeys for recreation / keeping fit, where over half (55%) of respondents walked all the way to their destination, no mode other than car as a driver was used by more than one in three respondents for any given journey purpose.

Some journey purposes where modes other than the car made up an above-average proportion of journeys are detailed below.

- Travelling to a place of education as a pupil or student was most commonly done by bus (35%) or walking (35%), followed by train (19%) or car as passenger (19%). Other modes were used by fewer than one in five respondents.

- Although travelling to a place of work was most commonly done by car (58%), a fifth of respondents used a bus (18%) and a similar proportion (17%) walked all the way to their destination. One in eight (14%) used a train and a similar proportion (13%) used a car as a passenger. One in ten (10%) used the underground or metro.

- Although business travel was also most commonly undertaken by car as a driver (49%), a quarter (28%) of these journeys were undertaken by train, one in eight (15%) involved the underground / metro and the same proportion (15%) involved car as a passenger. Other modes were used by fewer than one in eight respondents.

- When going on a day trip, two in five respondents (42%) used a car as a driver and the same proportion (38%) used a car as a passenger. However, a quarter of these journeys (25%) were made by train and one in eight (15%) were made by bus. Other modes were used by fewer than one in ten respondents.

- When going on holiday, one in three respondents (32%) used an aeroplane and similar proportions used a car as a driver (31%) or car as a passenger (29%). One in five respondents (21%) used a train. Other modes were used by fewer than one in five respondents.

Chapter 2: What is influencing transport choices?

Chapter Summary:

Cost-of-living pressures

- Most respondents (65%) reported they were making at least one type of journey less often to save money. In the three months before taking part in the research, 56% were walking more and 32% were driving less to save money.

The digital economy

- Most respondents (92%) shopped online in November 2023 – similar to the previous year – and most expected to continue engaging digitally.

Changing working patterns

- More people in full or part time employment travelled to their place of work five days a week or more in November 2023 (36%) than in November 2022 (32%), although this remained below pre-pandemic levels (47%). This trend supported use of modes associated with commuting (cars, trains, buses and underground/metro services).

Attitudes towards the environment and sustainability

- In November 2023, a smaller proportion of respondents stated they were willing to change their transport behaviour to reduce their contribution to climate change through using their car less, limiting flying, or walking and/or cycling more compared to November 2022.

This chapter considers factors which may influence whether and how people travel, with a particular focus on the cost-of-living, people's lifestyles and their attitudes towards sustainability.

The research found that a range of factors influenced respondents' decisions over whether and how to travel, including their age, life circumstances and the transport options available to them. Cost of living changes and respondents' perceptions of the relative cost of different transport options appear to be key influences on respondents' choices, while views on sustainability appear to have less of an influence than in previous years.

Travel choices people face

Respondents face two core transport choices: whether to travel and, if they decide to travel, how to make their journey.

The decision of whether to travel is complex and influenced by perceptions of the necessity and feasibility of travelling. Some journeys are less discretionary than others. Whether someone chooses to go shopping in their local area or shop online instead will be influenced by whether the goods or services they are looking for are available in their local area and their digital skills and capabilities. Decisions to attend a place of work will be framed by the nature of a person's employment (i.e., whether their job can be done away from their place of work/remotely), and their organisations' policies (e.g., what proportion of time they can work from home, how much flexibility they have over when to travel to their place of work).

Once the decision to travel has been made, how people choose to travel is framed by the transport choices that are available to them and the extent that these options are perceived as viable for the journeys they are seeking to make.

Most respondents lived near or had notional access to several potential transport options.

- Three quarters (77%) of respondents said they had a car or van in their household, a quarter (25%) had a bicycle and one in twenty (4%) had an e-scooter.

- Eight in ten (81%) lived within a 15-minute walk (or two to three minute drive) of a bus stop, four in ten (39%) stated they lived within the same distance from a bus station (39%) and a similar proportion (38%) lived within that distance of a train station.

- One in eight (15%) lived within a 15-minute walk (or two-to-three-minute drive) of an underground / metro station, with similar proportions living near to a bicycle/e-bike sharing scheme (14%), e-scooter sharing scheme (14%) or tram stop/station (12%).

Those living in urban areas typically had greater access to a range of transport infrastructure (see Figure 3):

Figure 3 Availability of transport infrastructure at home or within a 15-minute walk (or two-to-three-minute drive) of respondents' homes, November 2023

	Average	Urban resident	Rural resident
Car/van in household	77%	74%	88%
Private Bicycle	25%	25%	26%
Bus stop	81%	82%	75%
Bus station	39%	43%	18%
Train station	38%	41%	21%
Underground/metro station	15%	17%	2%
Tram station	12%	13%	4%
Bicycle/e-bike sharing scheme	14%	15%	6%
E-scooter sharing scheme	14%	16%	5%

QNEW4. Are each of the following within a 15-minute walk (a 2 or 3-minute drive) from your home address, or not? BASE 2023: All respondents (n=3,732); Q30(B5). How many cars/vans does your household own or have continuous use of at present? BASE 2023: All respondents (n=3,732) Q32. Do you have regular use of the following? - Bicycle BASE 2023: All respondents (n=3,732)

However, a substantial proportion of respondents indicated they were reliant on certain modes. Over half of respondents (52%) agreed with the statement "I couldn't get by without using my car" - almost three quarters (71%) of respondents living in rural areas felt this way. Three in ten respondents (30%) agreed with the statement "I rely on public transport and would find it difficult not to use it" - agreement was higher among those living in urban areas (32%) and lower among those living in rural areas (18%). Interestingly, the data highlights that some respondents may be reliant on certain modes for certain types of journeys. A fifth (22%) of respondents who have a car or van in their household indicated that they rely on public transport.

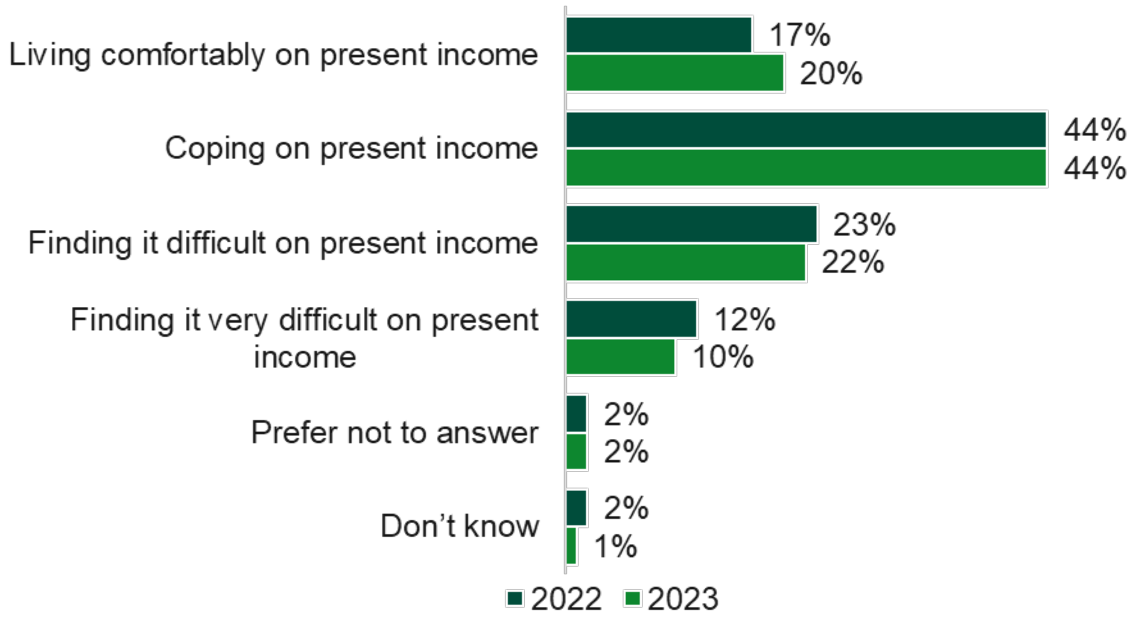
This suggests that while respondents had access to a range of travel options, and access to a mode is a pre-requisite for use, there are barriers to using certain modes. The influence of three trends on travel choices are discussed below, while barriers and enablers to choosing public transport are discussed in Chapter 3.

Cost-of-living pressures

There have been substantial changes in the cost of living in the UK in recent years.[1] In November 2023, when the fieldwork for this research took place, the inflation rate in the UK was 3.9%.[2] Although above the Bank of England's target rate of 2%, this is less than half the rate of inflation in November 2022, when it stood at 10.7%, and below inflation's recent peak rate of 11.2% in October 2022.[3]

Despite this improving economic context, substantial proportions of respondents stated in November 2023 they were finding it hard to manage on their present incomes (Figure 4). A third (32%) of respondents described themselves as finding it difficult (22%) or very difficult (10%) to manage on their present incomes. The remaining two thirds of respondents described themselves as living comfortably (20%) or coping on their present incomes (44%). The answers to this question in November 2023 were broadly similar to those given in November 2022, as shown on Figure 4.

Figure 4 Feelings about household income, November 2022 and November 2023



Q25. From this list, which of these phrases comes closest to describing your feeling about your household income these days? BASE: Nov 2023 All respondents (n=3,732); Nov 2022 All respondents (n=2,345)

Respondents who described themselves as finding it difficult or very difficult on their present income were disproportionately on lower incomes (earning £19,999 or less a year), in social grade C2DE and younger. These groups also more commonly experienced

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[1] These changes are captured through measures of inflation, such as the Consumer Prices Index (CPI). The CPI measures changes the prices of regularly purchased products (known as the basket of goods and services) compared with the same time in the previous year. How is inflation affecting your household costs? - Office for National Statistics (ons.gov.uk)

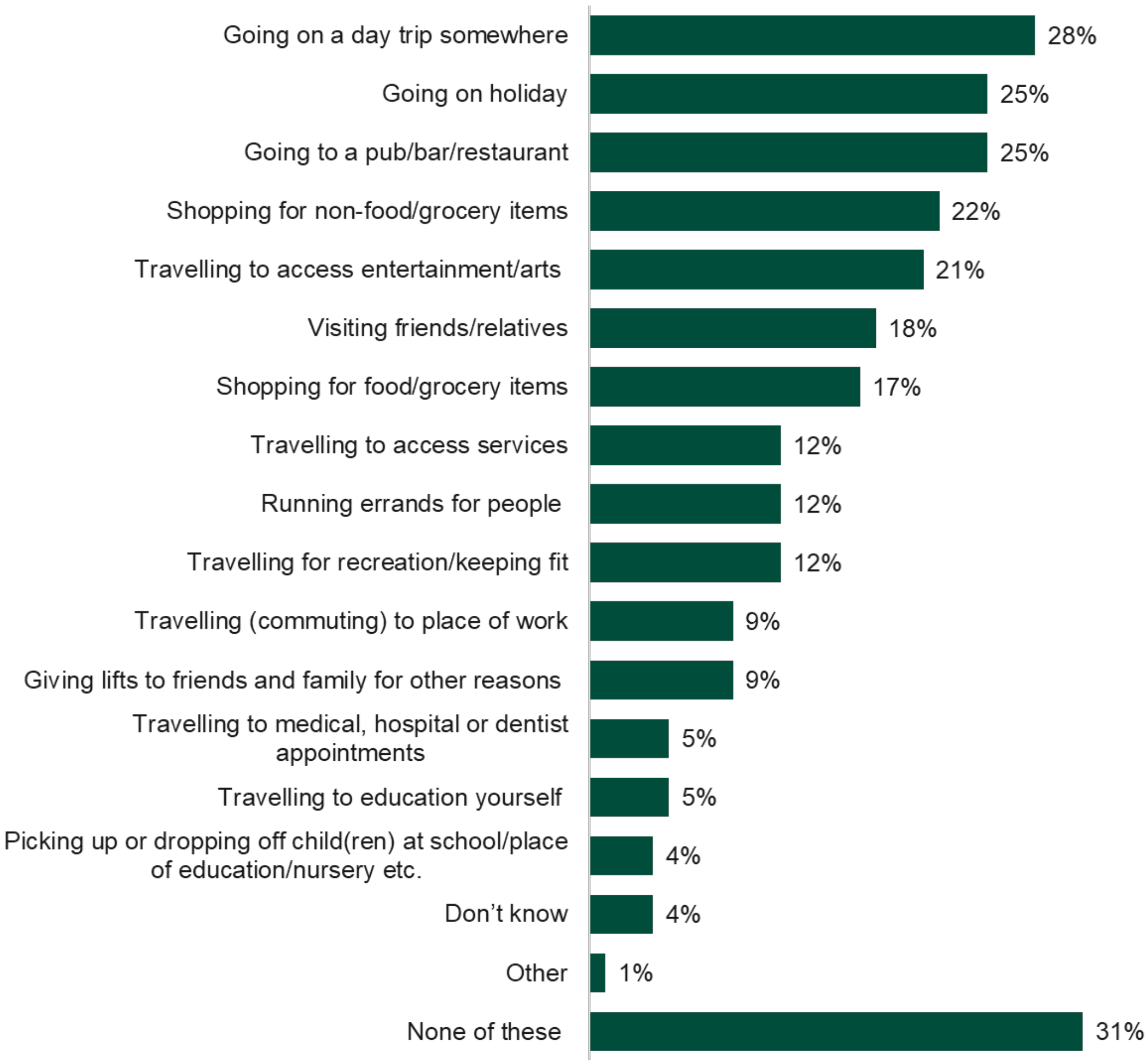
[2] CPI ANNUAL RATE 00: ALL ITEMS 2015=100 - Office for National Statistics (ons.gov.uk) (Accessed: 19 April 2024); Inflation and the 2% target | Bank of England

[3] CBP-9428.pdf (parliament.uk)

signs of financial distress in the last 12 months (e.g., fallen behind on other bills or utility payments, fallen behind on rent etc.).In this context, respondents appear to be trying to save money by making changes to whether and how they travel. People on lower incomes and those describing themselves as finding it difficult or very difficult on their present incomes were consistently more likely to have changed their travel behaviours to save money.

When asked to think about their behaviour generally, two thirds (65%) of respondents indicated they were making at least one type of journey less often to save money. Respondents most often reported cutting back on leisure journeys (going on a day trip, going on holiday, going to a pub, bar or restaurant; Figure 5).

Figure 5 Journeys respondents are taking less often to save money, November 2023



QNEW3. Which, if any, of these types of journey are you doing less often in order to save money? BASE: All respondents (n=3,732)

When considering their more recent behaviour, two thirds (65%) of respondents had taken actions to reduce the amount they spent on travel and transport in the three months before November 2023 (Figure 6). Common actions respondents had taken or planned to take involved changing how they travelled (e.g., walking more) or reducing or consolidating journeys. However, perhaps reflecting the improving economic context, people took fewer actions to reduce spending on travel and transport in November 2023 compared with November 2022 (Figure 6).

Figure 6 Actions respondents have taken in the last three months to reduce the amount they spend on transport and travel, November 2022 and November 2023

	November 2022	November 2023	Percentage Point Change
Walked more	57%	56%	- 1
Combined several trips by making one journey to save money	N/A	44%	N/A
Reduced the amount I travel/reduced non-essential journeys	46%	40%	- 6 *
Shopped around more to find the best deals on my travel/transport choices	37%	36%	- 1
Made fewer trips by car or van	41%	32%	- 9 *
Reduced the speed I drive/driven more efficiently to use less fuel	38%	31%	- 7 *
Made more trips by public transport	28%	29%	+ 1
Spent less on travel abroad	33%	28%	- 5 *
Pre-booked trips by public transport or take advantage of 'advance' ticket prices to save money	N/A	24%	N/A
Worked from home more	25%	19%	- 6 *
Put off a decision to buy/replace a car/van	22%	17%	- 5 *
Increased the number of lifts I get with others/give to others	17%	14%	- 3 *
Cycled more	16%	13%	- 3 *

Figure 6 Continued: Actions respondents have taken in the last three months to reduce the amount they spend on transport and travel, November 2022 and November 2023

	November 2022	November 2023	Percentage Point Change
Purchased a fuel-efficient petrol or diesel vehicle	14%	12%	- 2 *
Made a decision to buy/replace a car or van earlier than planned	11%	9%	- 2 *
Reduced the number of cars/vans in my household	12%	8%	- 4 *
Used ride-sharing apps more	9%	6%	- 3 *
Purchased an electric car or van	9%	6%	- 3 *
Joined a car club or used a car club more	8%	5%	- 3 *

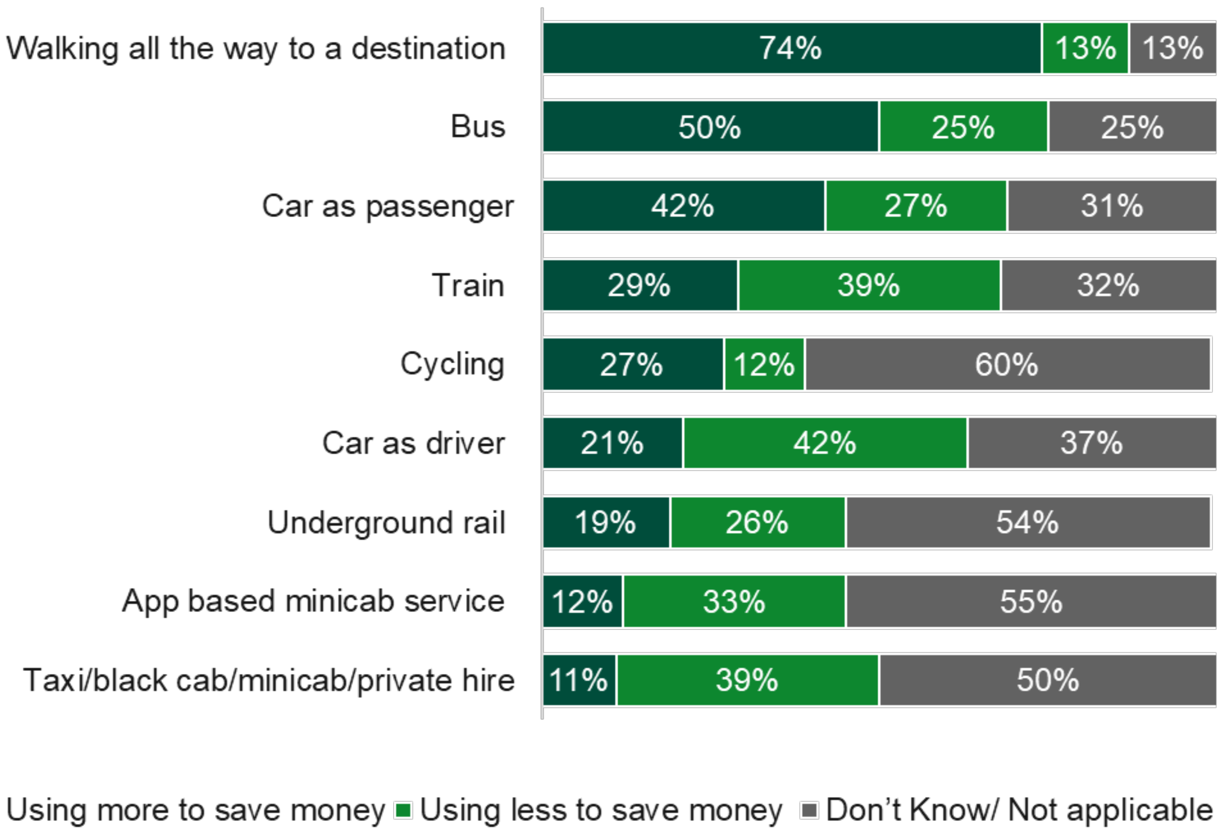
Q27. Below are some actions people may have taken to reduce the amount they spend on transport and travel. Which of these, if any, have you done in the last 3 months? BASE: November 2022 All respondents (n=3,732) Nov 2022 All respondents (n=2,345)

The actions respondents are taking to save money on travel and transport may partly explain why use of some modes has decreased while other modes' levels of use has been more resilient (see Chapter 1).

The relative cost of using certain modes may also influence respondents' choices. A quarter (26%) of respondents agreed with the statement "I am using different modes of transport these days to save money" and almost half (45%) of respondents agreed "I would like to use a different mode of transport to save money but am limited by the options available to me".

The quarter of respondents who indicated they had changed their behaviour indicated they were making more use of free or low-cost modes of transport, e.g., walking, the bus, using the car as a passenger (Figure 7). Walking being free and most single fare bus journeys in England benefiting from a £2 fare cap during the research period may explain the increase in walking and the static rate of bus use year on year, in a context where use of almost all other modes has declined.

Figure 7 Modes respondents state they are using more or less to save money,, November 2023



QNEW2. You said that you are using different modes of transport these days to save money. Which, if any, of these modes are you using less of, and which are you using more of? BASE: All those indicating they are using different modes of transport to save money (n = 964).

The digital economy

The pandemic period accelerated the growth of the digital economy. More people shopped online or accessed services digitally. This has the potential to reduce demand for transport among members of the public and increase the demand for freight travel (increase in online shopping).

These lifestyle changes appear to have been sustained. Nine in ten respondents (92%) had banked online and a similar proportion (88%) had shopped online at least once in the four weeks before taking part in the survey in November 2023. While we did not ask about online banking in November 2022, the proportion of people who shopped online in

November 2022 (86%) was in line with November 2023. A smaller proportion of people used home delivery services in November 2023 (45%) than in November 2022 (49%).

Most people anticipate they will continue to engage digitally or do more online in the future. A third of people expect to do more leisure activities at home or online rather than in-person in 12 months' time (32%).

Although engaging with e-commerce remains common, people continue to shop closer to home (within a 15-20 minute walk of where they live). Eight in ten (82%) did this in November 2023 and planned to do so in the first three months of 2024 (78%), although a larger proportion of people shopped closer to home in November 2022 (85%).

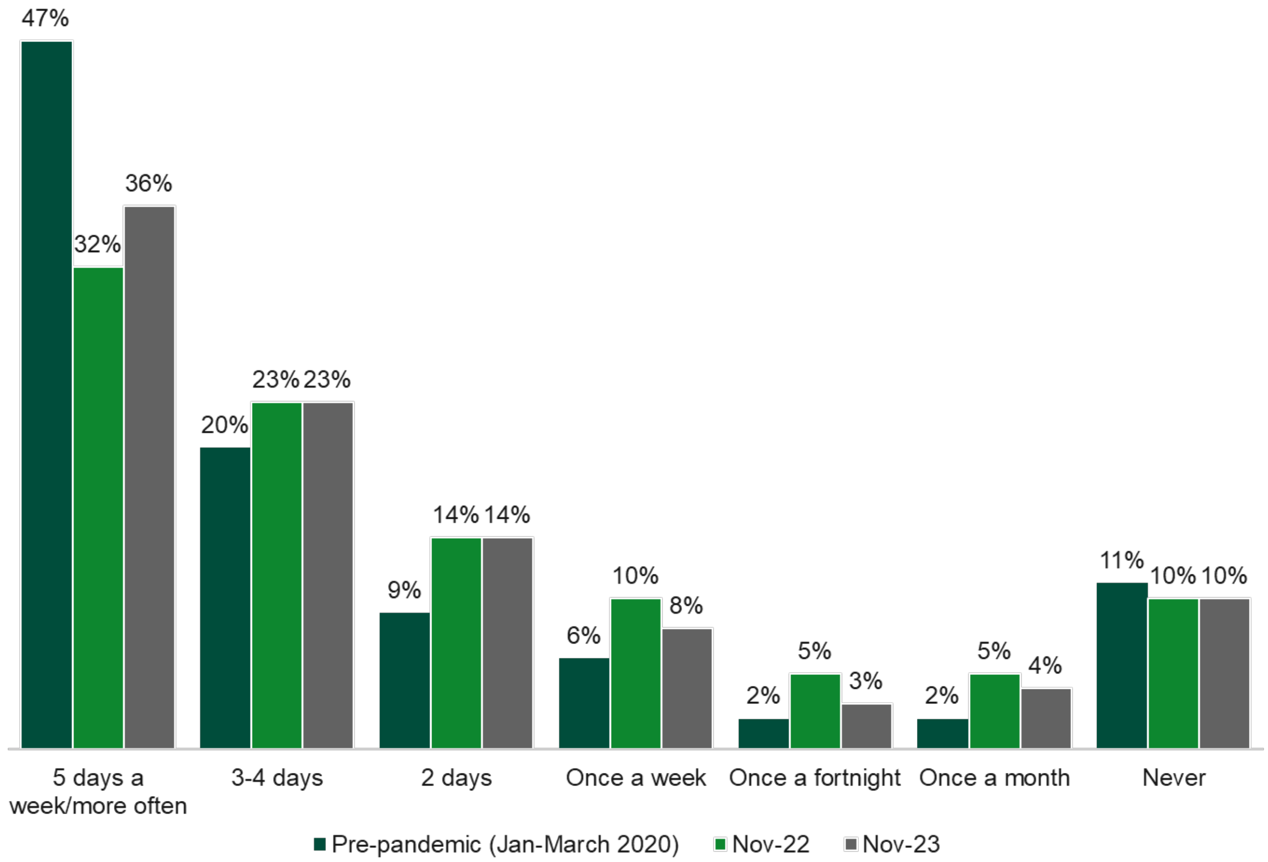
Changing working patterns

Most respondents were in some form of paid employment (60% full-time/part-time; 7% self-employed) in November 2023. Over half of those indicating they were working full-time or part-time worked five days a week or more (55%), while a fifth (23%) worked between three and four days a week and just under a fifth worked two days a week or less frequently (17%). Those working full or part time were more commonly younger, living in urban areas and male.

The pandemic period required many people to work remotely to facilitate social distancing and reduce the spread of the coronavirus. Most respondents in full or part time employment travelled to a place of work at least once in November 2023 (89%), although a sizeable minority were able to work from home at least some of the time (37%). This overall rate of attendance at a place of work is in line with both November 2022 (90%) and the pre-pandemic period (90%).

While the overall attendance rate at a place of work remains largely unchanged, there were changes in the frequency of workplace attendance between November 2022 and November 2023 (Figure 8). The proportion of people in full-time or part-time employment who went to their place of work 5 days a week or more was 36% in November 2023, which was higher than in November 2022 (32%) but well below the pre-pandemic level (47%). Similarly, the proportion of people who were going to their place of work only once a week or less frequently was lower in November 2023 than in November 2022 but remained higher than the pre-pandemic level.

Figure 8 Trend for frequency of travel to a place of work for those in paid employment, Pre-pandemic, November 2022 and November 2023



Q20: How often, if at all, did you typically do each of the following during the last 4 weeks? – Travel to place of work Base: pre-pandemic: adults in full-time or part-time employment in England (n = 2,184); November 2022: adults in full-time or part-time employment in England, (n = 1,450); November 2023: adults in full-time or part-time employment in England (n = 2,161)

Larger proportions of respondents attending their places of work may explain the relatively smaller decreases in mode use for modes more commonly associated with journeys to work (see Chapter 1). One in five (18%) respondents who had indicated they had made journeys to a place of work in the last four weeks stated they had used a bus and one in eight (14%) stated they had used a train. Journeys to a place of work are less likely to be discretionary than journeys for leisure purposes.

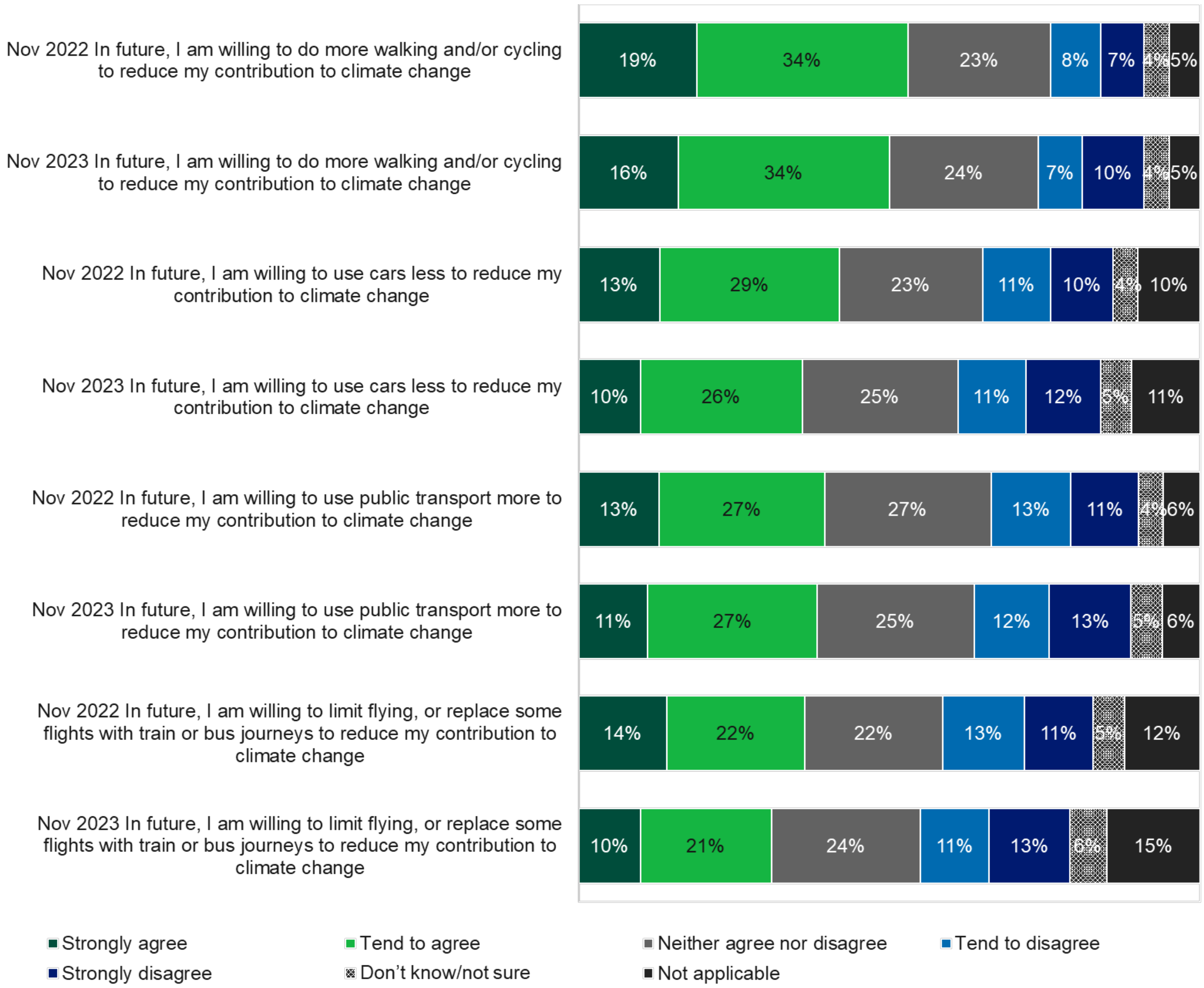
Attitudes towards the environment and sustainability

A majority (62%) of respondents agreed that they "would be happy to make some changes to [their] lifestyle to help reduce [their] contribution to climate change”. One in eight (13%) disagreed with the statement.

Respondents' stated willingness to change their transport behaviours, however, was lower than their willingness to change their lifestyles in general. While sizeable proportions were willing to walk more (50%), use public transport more (38%), drive less (36%) or limit flying/replace some flights with train or bus journeys (31%) in future to reduce their contribution to climate change, a fifth (17%) of respondents disagreed that they would be willing to walk or cycle more, while a quarter (25%) disagreed that they would be willing to use public transport more and similar proportions said they would not use their cars less (23%) or fly less (24%).

There has also been a decline in the proportion of respondents willing to change their travel behaviour for environmental reasons between November 2022 and November 2023 (Figure 9). While the proportions of respondents willing to use public transport more was consistent year-on-year, in November 2023 a smaller proportion of people were willing to reduce the use of their car (36% in November 2023 compared to 42% in November 2022), fly less (31% in November 2023 compared to 37% in November 2022) or increase their walking and/or cycling to reduce their contribution to climate change (50% in November 2023 compared to 53%% in November 2022).

Figure 9 Willingness to change future travel behaviour to reduce contribution to climate change, November 2022 and November 2023



QNEW1. To what extent do you agree or disagree with the following statement? I would be happy to make some changes to my lifestyle to help reduce my contribution to climate change. BASE: All respondents (n=3,732) Q23. To what extent do you agree or disagree with each of the following statements? BASE 2023: All respondents (n=3,732); BASE 2022: All respondents (n=2,345).

Respondents who were more willing to change their behaviour to reduce their contribution to climate change were typically younger, in higher social grades and had more recent experience using either active transport modes or public transport. [4] For example, half (49%) of respondents who had used public transport in the four weeks before taking part in the research were willing to use public transport more in the future, compared to a fifth (21%) of non-public transport users. They were also more willing to cut back on flying (37%) compared to non-public transport users (22%).

Similarly, people living in closer proximity to public transport infrastructure (within a 15-minute walk or two-to-three-minute drive) were also typically more willing to change their transport behaviour for climate related reasons. Although, as discussed in Chapter 3, the relationship between proximity and mode use is complex, this suggests modes being nearby and convenient to use may increase willingness to use.

[4] 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).

Chapter 3: What are the barriers and enablers to using public transport?

Chapter Summary:

Proximity to public transport infrastructure

- Most respondents reported living within a 15-minute walk or two-to-three-minute drive of some public transport infrastructure. However, proximity to public transport did not necessarily translate to use. Nearly half of respondents who lived within a 15-minute walk of a bus stop had not travelled by bus in November 2023.

Cost of journeys and reliability of public transport

- Cost and reliability were seen as key barriers to using public transport. 40% of respondents felt public transport was too expensive and a similar proportion (46%) considered it cheaper to travel by car. 30% of respondents said that they had chosen not to travel by public transport because of reliability concerns and 32% had travelled another way for this reason.

Concerns about illness and hygiene

- Hygiene and the potential for catching illnesses, such as flu, coughs and colds, and coronavirus, acted as a barrier with 19% of respondents having avoided public transport in November 2023 due to these.

What would encourage people to use public transport?

- To encourage them to consider using public transport more, respondents would like to have financial incentives (e.g. cheaper fares), better punctuality and reliability (i.e. services that run on time), improved connections in the areas where they live or need to go, and/or more frequent services.

This chapter looks at barriers and enablers to using public transport as well as what would encourage people to use public transport more.

The research found that the proximity and accessibility of public transport, cost, reliability/punctuality, connectivity and concerns about infection influence use of public transport, although respondents' sensitivity to these issues varied considerably.

Public transport users

Three fifths (62%) of respondents in England had used public transport in November 2023. Younger respondents (those aged 16-34) (78%) were more likely to use public transport whereas older respondents (those aged 55-75) (50%) were less likely to do so.

The opposite is the case for those respondents who had not used public transport in November 2023. Four in ten (38%) respondents had not used public transport in November 2023 and older respondents (those aged 55-75) (50%) were more likely to not use public transport than those who were younger (those aged 16-34) (22%).

Bus was the most used mode of public transport in November 2023. Nearly half (49%) of respondents had travelled by bus at least once in the previous four weeks. Four in ten respondents (41%) had travelled by train and over a quarter (27%) by underground rail or metro.

A substantial minority of respondents depend on public transport. In November 2023, three in ten (30%) respondents agreed that they are reliant on public transport and would find it difficult to not use it - typically, these respondents did not have a car or van in their household. This was similar across all forms of public transport. Half (49%) of respondents who had travelled by bus and similar proportions of those who travelled by underground metro/rail (49%) or train (45%) in the past four weeks agreed that they were reliant on public transport.

However, some of those who say they are reliant on public also have access to a car or van. A fifth (22%) of respondents who say they are reliant on public transport also own or have continuous use of at least one car or van in their household.

It may be that for some types of journeys public transport is preferred or the only practical option or that, in some households, vehicles are shared and at least one member is dependent on public transport as a result.

Barriers and enablers to public transport use

Proximity and accessibility to public transport, perceptions about cost and reliability, and the level of concern about illnesses and hygiene, were reported as barriers to using public transport. Each issue affected different groups in their own way.

Proximity to public transport infrastructure

As discussed in chapter 2, the majority of respondents lived close to (within a 15-minute walk or a 2-3 minute drive of) some form of public transport infrastructure. Eight in ten (81%) respondents lived close to a permanent bus stop, four in ten (39%) close to a bus station or to a train station (38%) and one in eight (15%) close to an underground rail/metro station or stop.

Proximity did not however necessarily translate into use. Although respondents who lived close to a permanent bus stop or station were more likely to travel by bus than those who did not, nearly half (49%) of respondents who lived within a 15-minute walk of a permanent bus stop and 40% who lived within the same distance from a bus station had not travelled by bus in the past four weeks.

The story is the same for train use. Although 55% of respondents who lived within a 15-minute walk of a train station had travelled this way at least once in the past four weeks, 45% had not.

This suggests that despite proximity to a stop or station, for some respondents, other factors will be more important in dictating or influencing the way they travel. These could be things like cost, reliability, convenience, time of travel or whether the public transport routes take them where they want or need to go.

When it comes to proximity to an underground rail/metro station or stop, however, the picture is a little different. Three quarters (73%) of respondents who lived within a 15-minute walk of one of these had travelled this way in the past four weeks. This may be due to underground rail and metro services being concentrated in large city centres where other transport options are potentially less feasible or less suitable, e.g. the cost of paying for parking and low emission zones if driving.

Accessibility of public transport

Three in ten respondents (31%) reported that they had either a long-standing mental or physical health condition or illness. A smaller proportion of these respondents than average used public transport. Just a fifth of respondents (20%) with a long-standing mental health condition or illness and a fifth of respondents (21%) with a long-standing physical health condition or illness travelled by public transport at least once in the past four weeks, compared to 62% on average.

The nature of respondents' physical or mental health condition or disability was not captured as part of this research, nor was the degree to which respondents felt it impacted their day to day lives. However, respondents were asked if they had a disability or other long-standing health problem that made it difficult for them to use different types of transport. Around one in ten (9%) respondents said they had difficulty using local buses and a similar proportion (8%) said they had difficulty taking a train. This indicates that those with a long-standing health condition or illness are likely to face additional accessibility barriers in using public transport.

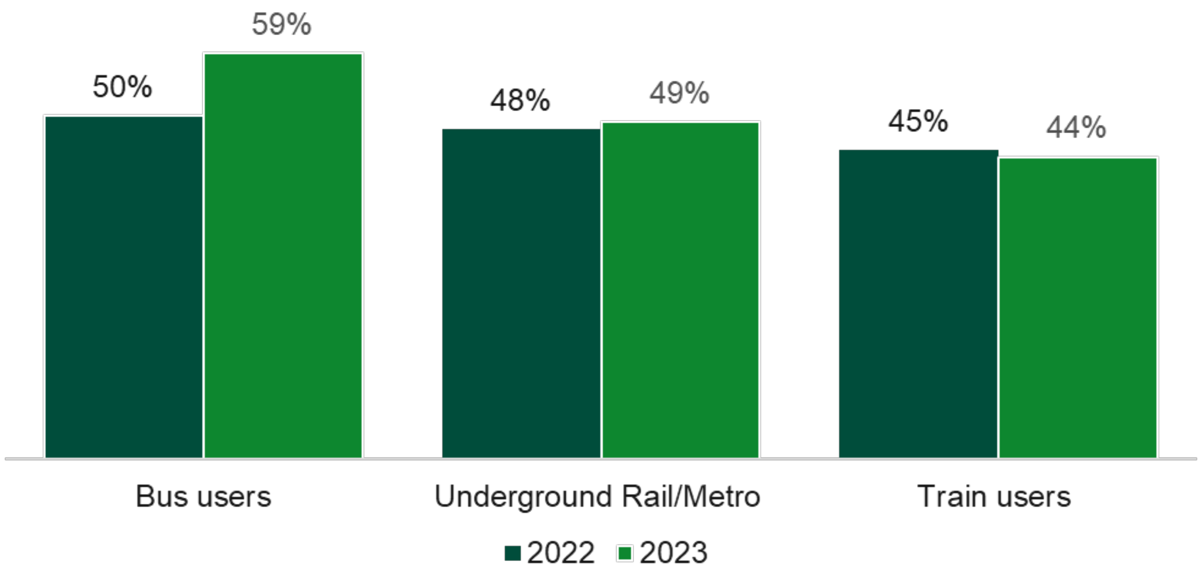
Cost of journeys and value for money

Respondents considered cost a barrier to using public transport. Four in ten (40%) respondents agreed that they would like to travel by public transport more but that it was too expensive. Just under a half (46%) of respondents agreed that for the journeys that they make they consider it cheaper to travel by car than public transport.

Respondents who viewed public transport as expensive were often also public transport users. Just under half (45%) of those who agreed that they would like to use public transport more, but viewed it as too expensive, were frequent public transport users. Indeed, half (49%) of respondents who agreed with this statement also said that they rely on public transport. This suggests that many of those who already use public transport are being put off using it more due to cost.

When it comes to value for money, six in ten (59%) respondents who had travelled by bus in November 2023 were satisfied with this aspect of bus trips. This proportion had increased from one in two (50%) in November 2022, which may reflect the introduction of the £2 bus fare cap in January 2023. There had been no change in satisfaction with value for money for underground rail/metro or train users over this period - half (49%) of respondents who had travelled by underground rail/metro were satisfied in November 2023 compared to 48% the previous year. The figures for satisfaction with value for money among train users were 45% and 44% for November 2022 and 2023 respectively.

Figure 10 Satisfaction with the value for money of most recent journey among public transport users, November 2022 and November 2023

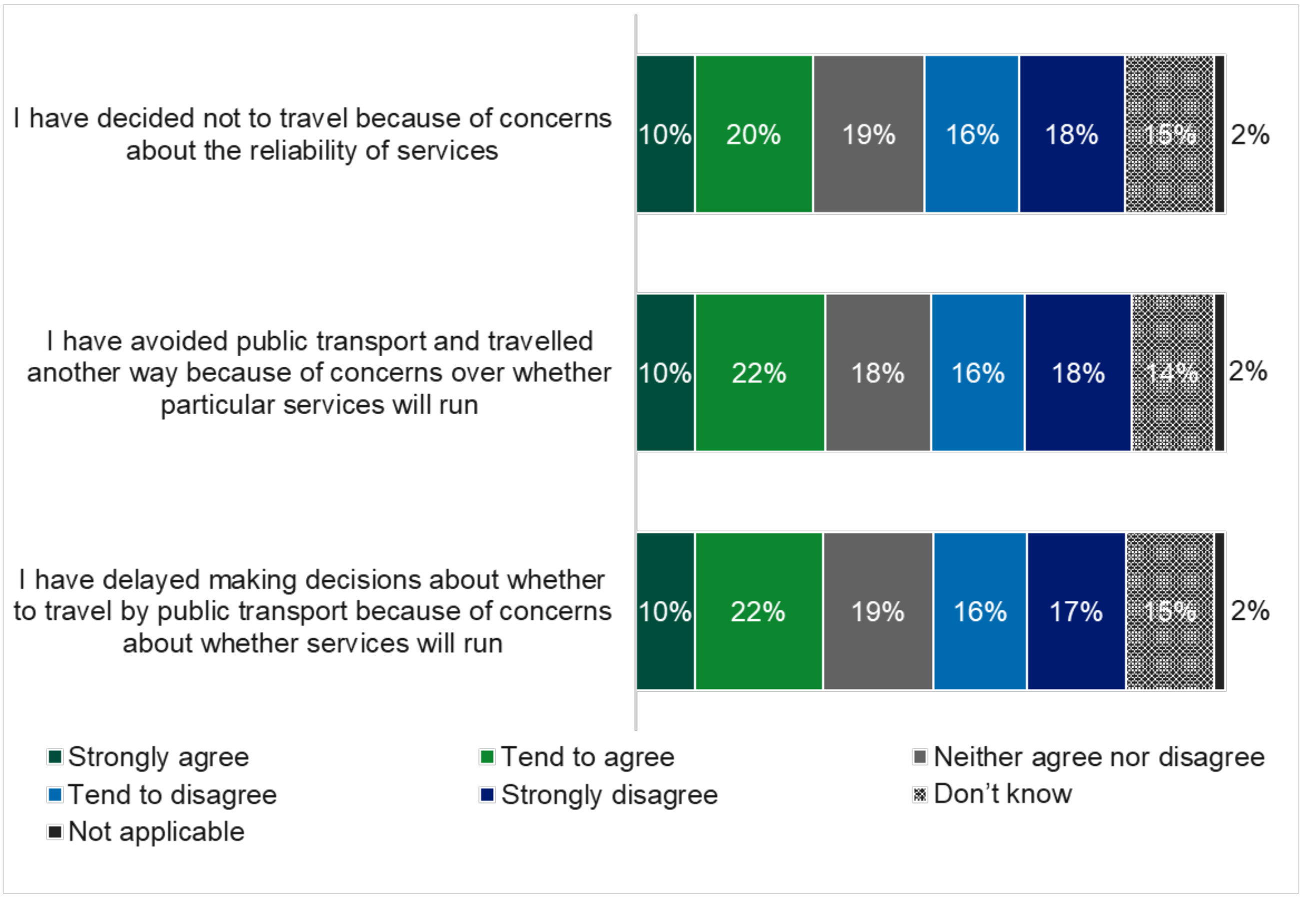


Q9/10/11. You said earlier that you travelled by [bus/train/underground rail or metro] in the last 4 weeks. Thinking back to the last journey you made by [bus/train/underground rail or metro], to what extent were you satisfied or dissatisfied with each of the following…? BASE 2022/2023: All those who had used a bus in the last four weeks (n=1,116/ n=1,807); BASE 2022/2023: All those who had used an underground train/metro in the last four weeks (n=688/n=1,025); BASE 2022/2023: All those who had used a train in the last four weeks (n=1,002/1,555)

Reliability and punctuality of public transport

A substantial minority of respondents indicated they had not used public transport or decided not to travel due to concerns over the reliability of public transport. Around three in ten respondents (30%) agreed they had decided not to travel because of concerns about the reliability of services. Similar proportions avoided public transport and travelled another way because of concerns over whether particular services will run (32%) or delayed making decisions about whether to travel by public transport because of concerns about whether services will run (32%). These statements were not asked in November 2022 so it is not possible to know whether opinions on reliability had changed over the past year.

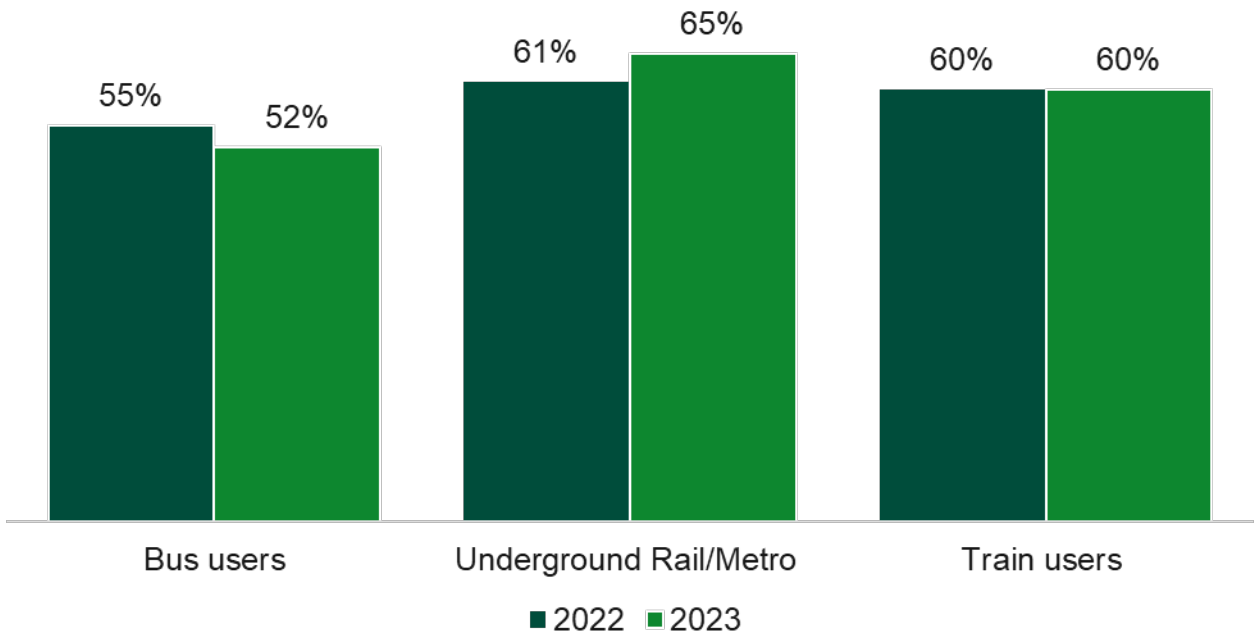
Figure 11 Impact of perceived reliability of public transport on use in the last four weeks, November 2023



Q8A. Thinking about the last 4 weeks and public transport (e.g. trains, buses, underground, rail/metro), to what extent do you agree or disagree with each of the following? BASE: All respondents (n=3,732)

The majority of public transport users were satisfied with the punctuality on their most recent journey. While satisfaction varied depending on the mode of transport, satisfaction with the punctuality of respondents most recent journey in November 2023 was in line with respondents' satisfaction with the most recent journey in November 2022 (Figure 12).

Figure 12 Satisfaction with the punctuality of most recent journey among public transport users, November 2022 and November 2023



Q9/10/11. You said earlier that you travelled by [bus/train/underground rail or metro] in the last 4 weeks. Thinking back to the last journey you made by [bus/train/underground rail or metro], to what extent were you satisfied or dissatisfied with each of the following…? BASE 2022/2023: All those who had used a bus in the last four weeks (n=1,116/ n=1,807); BASE 2022/2023: All those who had used an underground train/metro in the last four weeks (n=688/n=1,025); BASE 2022/2023: All those who had used a train in the last four weeks (n=1,002/1,555)

Concerns about illness and hygiene

Concerns about catching illnesses remained a barrier to using public transport for some respondents. In November 2023, nearly a fifth (19%) of respondents had avoided public transport in the previous four weeks because of concerns about catching illnesses, such as flu, coughs and colds, and coronavirus. This is lower than 12 months previously when just under a third (30%) of respondents said that they had avoided public transport because of concerns about catching coronavirus or winter illnesses such as flu, coughs and colds[5].

[5] There has been a slight change in the wording of the statements between the November 2022 and November 2023 surveys.
November 2022: "I have avoided public transport because of concerns about winter illness such as flu, coughs and colds."

Concerns are about hygiene and catching illnesses are very personal and difficult to tackle. Concerns are also likely to be higher in November and the winter months than during other times of the year.

Concerns about hygiene also influenced respondents' travel choices. A fifth (19%) of respondents in November 2023 had avoided public transport in the previous four weeks because of concerns about hygiene. This statement was not asked in November 2022, so it is not possible to know whether opinions on hygiene had changed over the past year.

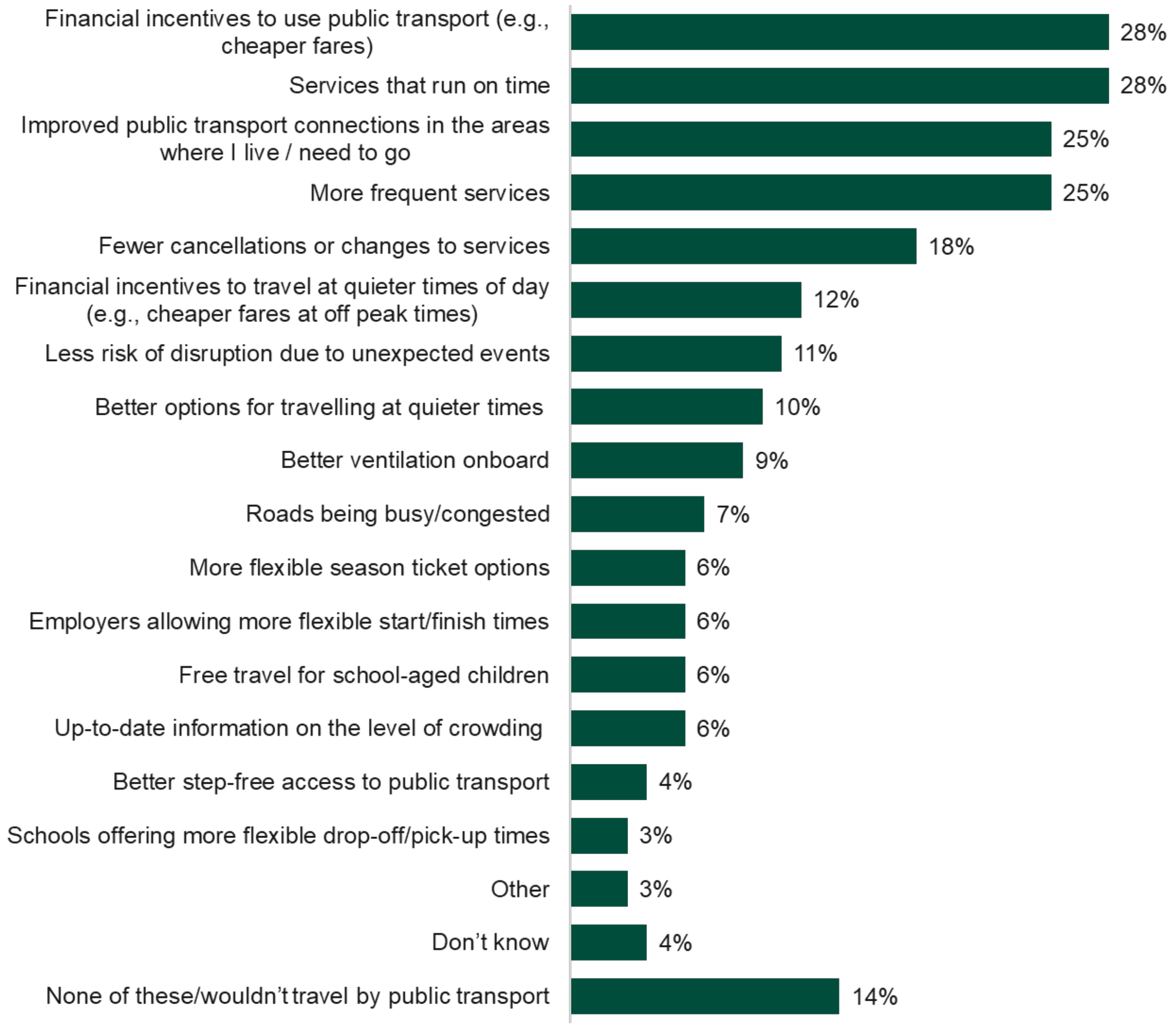
Encouraging public transport use

Financial incentives and a variety of improvements to services were the most common factors that respondents said would encourage them to use public transport more in November 2023. These included services running on time, better public transport connections, more frequent services, and fewer cancellations or changes.

November 2023: "I have avoided public transport because of concerns about illnesses such as flu, coughs and colds and coronavirus."

Over a quarter of respondents (28%) in November 2023 said that financial incentives and services that run on time would encourage them to use public transport (Figure 13). A quarter of respondents (25%) said that improved public transport connections and more frequent services would encourage them.

Figure 13 Things which would encourage people to consider traveling more by public transport, November 2023



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 rail/metro? BASE: All respondents (n=3,732) BASE: All Public Transport Users (n=2,322); BASE: All Non-Public Transport Users (n=1,410)

Between November 2022 and November 2023, the largest year on year increase was in relation to improved public transport connections. In November 2023, 25% of respondents said that this would encourage them to use public transport more. This compares to only 15% in November 2022, up ten percentage points. During this time there was no change in the proportion travelling by public transport at least once in the previous four weeks.

One in seven (14%) respondents in each year said that none of the listed options would encourage them to use public transport more or that they would not travel by public transport.

Differences in what would encourage public transport users and non-users to use public transport

Public transport users and non-public transport users identified similar things that would encourage them to use public transport more, for example, financial incentives, e.g. cheaper fares; more frequent services; services that run on time; and improved public transport connections (Figure 14).

Figure 14 Things which would encourage people to consider traveling more by public transport, Public Transport Users and Non-Public Transport Users, November 2023

	Average	Public Transport users	Non-Public Transport Users
Financial incentives to use public transport	28%	31%	23%
Services that run on time	28%	32%	22%
Improved public transport connections in the areas where I live / need to go	25%	24%	25%
More frequent services	25%	28%	22%
Fewer cancellations or changes to services	18%	23%	11%
Financial incentives to travel at quieter times of day (e.g., cheaper fares at off peak times)	12%	14%	9%
Less risk of disruption due to unexpected events	11%	14%	7%
Better options for travelling at quieter times	10%	11%	7%
Better ventilation onboard	9%	10%	7%
Roads being busy/congested	7%	8%	6%

Figure 14 Continued: Things which would encourage people to consider traveling more by public transport, Public Transport Users and Non-Public Transport Users, November 2023

	Average	Public Transport users	Non-Public Transport Users
More flexible season ticket options	6%	8%	3%
Employers allowing more flexible start/finish times	6%	6%	5%
Free travel for school-aged children	6%	7%	5%
Up-to-date information on crowding	6%	8%	4%
Better step-free access to public transport	4%	5%	2%
Schools offering more flexible drop-off/pick-up times	3%	4%	2%
Other	3%	3%	4%
Don't know	4%	4%	4%
None of these/wouldn't travel by public transport	14%	5%	29%

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 rail/metro? BASE: All respondents (n=3,732) BASE: All Public Transport Users (n=2,322); BASE: All Non-Public Transport Users (n=1,410)

Respondents who had used public transport in the past four weeks were more likely to identify ways they could be encouraged to use public transport more compared to those who had not used public transport.

Three in ten (31%) public transport users said that financial incentives would encourage them to use public transport more compared to two in ten (23%) of those who did not use public transport in the past four weeks.

Respondents who had travelled by public transport in the past four weeks were more likely to select options related to improving their journeys, such as more frequent services, services that run on time, improved public transport connections, and better options for travelling at quieter times. They were less likely to select options that did not relate directly to using public transport, for example, schools offering more flexible drop-off/pick-up times.

One in three (29%) respondents who had not used public transport in the past four weeks said that none of the options would encourage them to travel more by public transport or that they would not travel by public transport. This compares to just one in twenty (5%) of those who had used public transport in the past four weeks, indicating that current users are more likely to be open to increasing their public transport use than non-users.

Annex A: Technical Report

Methodology

Our Changing Travel 2 builds on work conducted during (All Change?) and immediately after (Our Changing Travel) the Covid-19 pandemic.

Our Changing Travel 2 is a cross-sectional study which captures respondents' attitudes and behaviours at a particular point in time. Our Changing Travel 2's core design was the same as for Our Changing Travel, which took place in November 2022. Different respondents took part in Our Changing Travel and Our Changing Travel 2. It is therefore not possible to track the behaviours, attitudes or responses of specific respondents over time.

All Change? was a longitudinal research study[6] that took place during the pandemic period with the last wave, Wave 6, in November 2021.

It is possible to compare the results from these three surveys because they all involved the production of representative samples of the population via online survey methodologies.

Fieldwork

The fieldwork for Our Changing Travel 2 took place between 17 and 29 November 2023. Figure 15 shows the fieldwork periods of other surveys referred to in this report and the time periods that they cover.

Figure 15 Fieldwork dates for studies referenced in this report

Survey	Fieldwork Dates
All change? Wave 6	4-29 November 2021
Our Changing Travel November 2022	15-21 November 2022
Our Changing Travel November 2023	17-29 November 2022

[6] https://www.gov.uk/government/publications/covid-19-travel-behaviour-during-the-lockdown

Modes of transport

The survey covered the following modes in Our Changing Travel 2 (November 2023):

- Car as a driver
- Car as a passenger
- Van
- Lorry/HGV
- 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
- Using a wheelchair or mobility scooter (i.e. an electrically powered scooter that has a seat, not an e-scooter)
- E-scooter (an electric or motorised stand-on scooter with a small engine or electric motor)

There were two changes to the mode options for November 2023 compared to November 2022. These were:

- Van/lorry – this was separated into two modes:
  - Van
  - Lorry/HGV
- Walking all the way to a destination or wheeling by a wheelchair or motorised scooter – this was separated into two modes:
  - Walking all the way to a destination
  - Using a wheelchair or mobility scooter (i.e. an electrically powered scooter that has a seat, not an e-scooter)

One new mode was added for November 2023:

- E-scooter (an electric or motorised stand-on scooter with a small engine or electric motor)

Overview of survey content

Figure 16 summarises the survey content for Our Changing Travel 2. Some changes were made to the survey content for November 2023, including the addition of questions to allow data to be segmented into the Department for Transport's Transport User Personas and update questions based on areas of interest. These include:

Figure 16 Overview of Our Changing Travel 2 Survey Content

Section	Topic
1	**Travel behaviour** • Travel in the last four weeks by mode • Travel in the last four weeks by purpose • Travel in the last four weeks by purpose by mode • Use of motorways or major roads in the last four weeks
2	**Changes in mode use** • Travel in the last four weeks by mode compared to 12 months ago • Agreement/disagreement to statements about illness and hygiene in relation to travel • Selection of incentives to encourage travel by public transport

	• Agreement/disagreement to statements about public transport
3	**Travel experience and priorities** • Satisfaction/dissatisfaction of most recent bus journey • Satisfaction/dissatisfaction of most recent underground rail/metro journey • Satisfaction/dissatisfaction of most recent train journey • Confidence of buying best priced train ticket for most recent train journey • Satisfaction/dissatisfaction of most recent taxi/black cab/minicab/private hire journey • Satisfaction/dissatisfaction of most recent App-based minicab service journey
4	**Future behaviour** • Travel in January-March 2024 by mode • Use of motorway or major roads during January-March 2024
5	**Travel to work and for shopping** • Frequency of paid employment in the last four weeks • Frequency of select activities in the last four weeks • Frequency of home delivery for non-food shopping • Frequency of select activities during January-March 2024
6	**Sustainable travel** • Agreement/disagreement with statements on future travel • Agreement/disagreement with more statements on future travel • Likelihood of travel abroad • Agreement/disagreement with statement on changing lifestyle to help reduce contribution to climate change
7	**Cost of living**

	• Perception of current household income • Selection of financially related experiences • Actions taken to reduce amount spent on transport and travel in the last three months • Actions to be taken to reduce amount spent on transport and travel in the next three months • Agreement/disagreement with statements on ways to save money • Travel modes used less or more to save money • Types of journeys done less to save money
8	**Transport and local area** • Proximity to public transport • Reliability of internet and mobile networks • Agreement/disagreement on accessing services and completing tasks online • Number of cars/vans in the household • Car/van fuel • Important features when buying a car/van • Access to bicycles and e-scooters • Selection of travel passes, season tickets and railcards • Likelihood of serious illness from coronavirus
9	**Classification** • Highest qualification held • Age of children at home • Mental health • Physical health • Disability or health problem making travel difficult

	• Disability or health problem making riding a bicycle difficult • Tenure

Sample

The sample was drawn from the Ipsos i-Say ('Access') online panel which comprises people who have expressed an interest in taking part in research. This means that the panel and sample are self-selecting. The sample is therefore confined to groups who are willing to sign-up to take part in research online.

Overall, the sample consisted of 3,732 respondents aged 16-75 in England. It included a boost of 150 ethnic minority respondents and 75 respondents living in the North East of England to increase their sample size to 607 and 222 respectively.

Weighting

The data has been weighted to the known population profile of England by age, gender, working status, ethnicity, social grade and region. This is consistent with Our Changing Travel and All Change?.

Survey data and statistical reliability

The data has an overall sampling tolerance of +/- 1.6 percentage points for a 50% finding among the full sample of 3,732 at the '95% confidence interval'. Tolerances will vary for subgroups and geographies according to their sample sizes and the percentages involved. While statistical significance assumes data has been collected from random samples, it is industry practice to apply them to non-random (including quota) samples.

Statistical t-tests were used in preference to other types of tests e.g. z-tests. This is the default method of testing within market research software and is used because the standard deviation is usually unknown. Ipsos applied testing to column proportions and column means, a blend of the two approaches most commonly requested by their clients.

The commentary on changes between years and among different groups and geographies focuses only on statistically significant changes and differences. Significance testing should be seen as indicative as the sample is drawn from a non-random probability sample.

Interpretation of findings

Percentages may not always sum to 100 due to multi-code responses or rounding. This also applies 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 may not sum to the percentage who said they strongly agreed and the percentage who said they agreed.

Caution should be applied when interpreting the findings for working from home because the time periods are not directly comparable.

- Findings for the pre-pandemic period covered a three-month reference period (between 1st January and 23rd March 2020) whereas findings from November 2022 and November 2023 covered four-week reference periods.

- The 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 (January-March 2020).

Changes in mode use are likely influenced by a range of factors including those not captured in the survey, e.g., the weather.