



Department
for Transport

Better Connected

A Strategy for Integrated Transport

Supporting evidence and analysis



April 2026

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



© Crown copyright 2026

This publication is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. To view this licence, visit <https://www.nationalarchives.gov.uk/doc/open-government-licence/version/3/> or contact The National Archives at www.nationalarchives.gov.uk/contact-us.

Where we have identified any third-party copyright information you will need to obtain permission from the copyright holders concerned.

This publication is also available on our website at www.gov.uk/government/organisations/department-for-transport

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

Photographic acknowledgements

Images reproduced with permission:
Images on pp.4 and 37 © Active Travel England
Images on pp.5, 29, 31, 33, 37 © Adobe

Contents

1	Background	4
2	Introduction	5
	Transport at a glance: key facts and figures	6
3	How and why people travel	8
	Sources in this section	8
	Extent of overall domestic travel	8
	Changing trip purposes	9
	Changes in how we travel	10
	Regional differences	12
	International differences: Europe	14
	Disability and transport use	16
	Gender and transport use	16
	How income affects transport use	17
	Understanding complex travel patterns: trip chains	21
4	Views and experiences of domestic transport	25
	Sources in this section	25
	Expectations from transport	25
	Driving	27
	Buses	28
	Trains	32
	Walking and wheeling	35
	Cycling	36
	Multimodal travel	39
5	Transport, people and growth: unlocking opportunity across England	40
	Evidence sources in this section	40
	The relationship between transport and growth	40
	More and better jobs	42
	Better ideas	43
	Better competition for firms	43
	Lower costs	43
6	Annex A: Summary of NTS trip chain analysis and FUSION data collection on multistage/multipurpose journeys	44
7	Endnotes	45



1 Background

As part of the development of Better Connected, the Department for Transport undertook a series of policy engagement exercises and analysed recent evidence to shape our approach:

Regional Roadshow

A series of “town-hall” style events to gather views from regional professional stakeholders on transport priorities and opportunities, exploring how our approach could support improvements.

People’s Panels

A series of sessions held with members of the public from groups whose voices are often underrepresented in transport policy and planning.

Call for Ideas

An open exercise inviting views from members of the public, frontline transport workers and organisations about their experiences of transport and suggestions for improvement.

Review of relevant evidence and analysis

An internal exercise reviewing evidence from established data sources and research, examining travel patterns, people’s experiences across the transport network and the role of transport in supporting economic growth and access to opportunities.

This report summarises the key findings from our review of relevant evidence and analysis. The results from the Regional Roadshow, People’s Panels, and the Call for Ideas have been published separately. The above exercises have been complemented by additional targeted stakeholder engagement.

This strategy has also been informed by informal engagement with local leaders and mayors, transport advocacy groups and local authority partners.



2 Introduction

The evidence contained in this document includes findings from the National Travel Survey–NTS¹, alongside research from the Department’s arms lengths bodies (in particular, Transport Focus’s regular research with transport users and non-users. We prioritised more recent evidence sources, and where relevant, have considered trends over time.

It also includes new analysis conducted specifically to support the strategy, using data from both the NTS and the Fusion of User Surveys and Integrated Online Navigation (FUSION) project. It helps us understand how people use transport in their daily lives, especially for journeys that involve more than one stage or purpose.

This document presents evidence on how people travel, including trip frequency, travel purposes, transport modes and variations among key groups and regions. It also examines people’s perceptions and experiences of the transport network as well as the role of transport in supporting economic growth and access to opportunities.

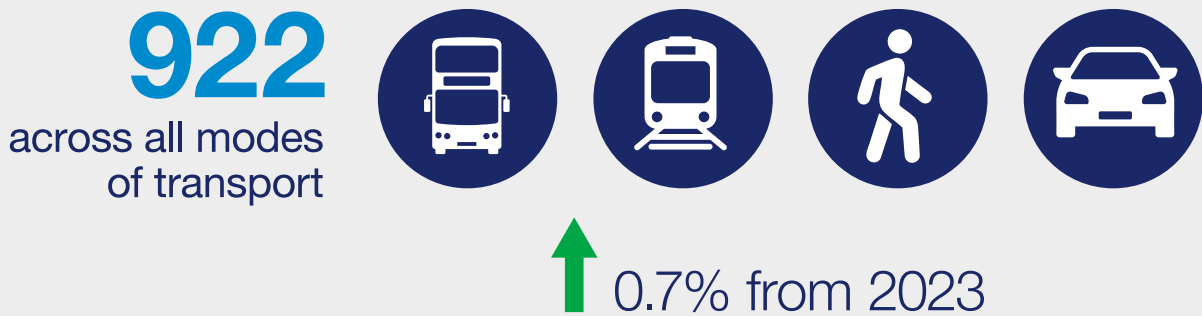
The evidence builds on insights gathered through our Better Connected engagement activities—the findings from our Call for Ideas, Regional Roadshow, and People’s Panels. These offered valuable, nuanced perspectives from a wide range of voices, both users of public transport and the wider population. This statistical evidence allows us to assess views and experiences across the transport system holistically.

Consistent with the scope of Better Connected, this document focuses on domestic transport in England. In cases where England-only data is not available, appropriate evidence covering Great Britain has been used.

Transport at a glance: key facts and figures

Latest figures from the National Travel Survey 2024

Trips taken per person in England

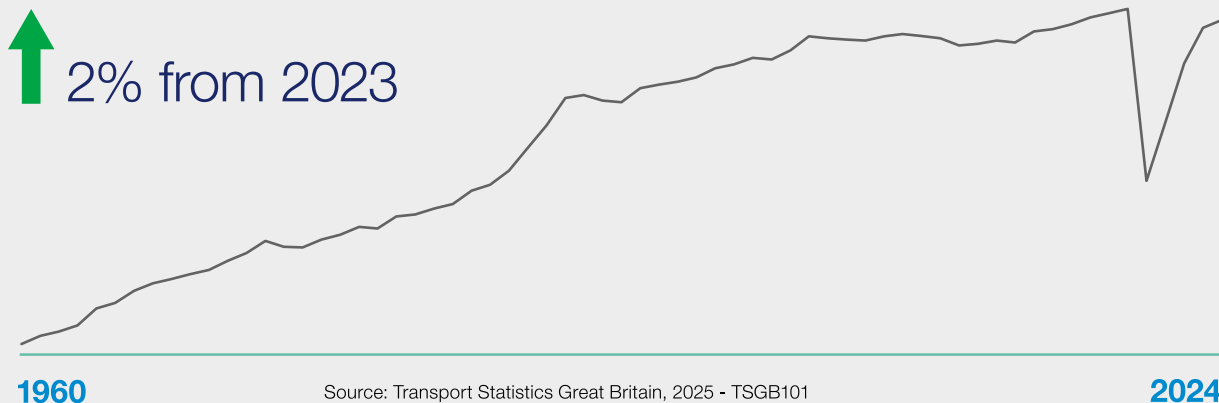


The most common
reason for travel in
England was

Shopping








People travelled a total of **813 billion** passenger kilometres in 2024, 2% higher than in 2023



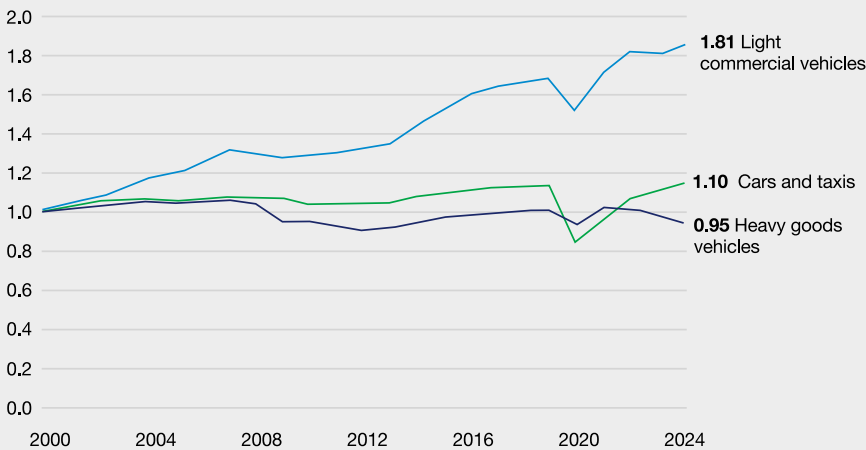
Passenger-kilometres measure the total distance travelled by all passengers. For example, 100 people each travelling 10 km equals 1,000 passenger-km. This combines both the number of users and the distance they travel, giving a clear measure of transport use and allowing better comparisons across different modes of transport. For more information, see [Transport Statistics Great Britain - GOV.UK](#)

Trends in trips by mode

	Distance travelled per person per year		Change as share of trips by mode
	In 2002	In 2024	
	181 miles	198 miles walked	↑ +18%
	38 miles	51 miles cycled	Stable
	337 miles	232 miles travelled	↓ -25%
	482 miles	697 miles travelled	↑ +79%
	5792 miles	4605 miles travelled	↓ -6%

All figures for England includes London but excludes London Underground and light rail. Less prevalent modes not shown but available at source - [NTS0409 2024](#)

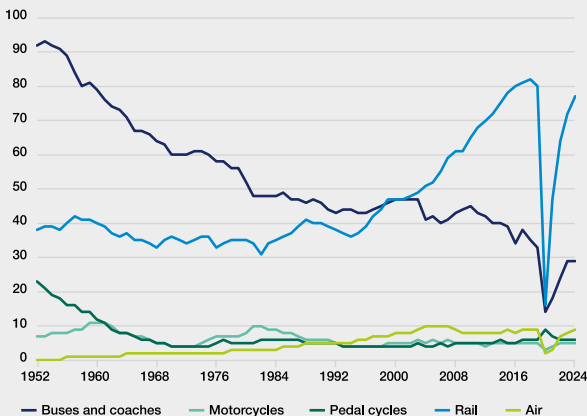
Percentage change in road traffic (vehicle miles) by vehicle type compared to 2000: Great Britain



Source: DfT road traffic statistics

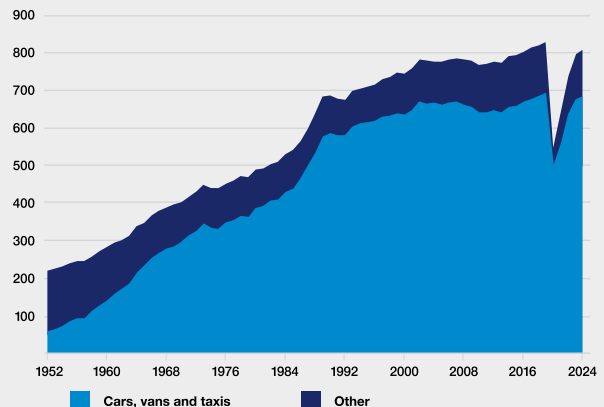
336 billion vehicle miles: the total distance driven by all vehicles in Great Britain in 2024

Passenger transport by mode, excluding cars, vans and taxis. Billion passenger kilometres. Great Britain 1952 to 2024



Source: Transport Statistics Great Britain, 2024

Passenger transport by cars, vans and taxis compared to other modes. Billion passenger kilometres. Great Britain 1952 to 2024



Source: Transport Statistics Great Britain, 2024

3 How and why people travel

Key points

People's travel choices are shaped by more than just transport systems, infrastructure or government policy—they're influenced by wider economic conditions, urban development, and behavioural factors. Changes in income, employment, where homes and jobs are located, regional initiatives, and shifts in attitudes and habits such as increased hybrid working post-pandemic all affect how, why, and how often people travel.

Following increases in overall travel throughout the latter part of the 20th century, domestic travel began to decline in the early 2000s. Reasons for travel have also changed in the past 25 years. While shopping and commuting remain the top two purposes for trips, both have decreased, while leisure travel has increased. Car remains the dominant mode of travel in all parts of England outside London, accounting for just under 60% of trips in 2024. Walking has increased in recent years, now accounting for 29% of trips. Public transport accounts for less than ten per cent of trips and has been slower to recover than car travel since the pandemic.

Travel patterns also differ across groups. Disabled people travel less than non-disabled people, and women of all ages take more trips but travel shorter distances than men. They also commute less and are more likely to travel to escort children to school. Lower income groups travel less overall, rely more on walking and buses, and spend a higher proportion of their income on transport.

Just over one in ten trips are part of longer chains, where people travel for different purposes during a single journey. Women of all ages, and those living in urban areas are also more likely to trip chain.

Sources in this section

The evidence in this section draws from the NTS and introduces new insights from both the NTS and the Fusion of User Surveys and Integrated Online Navigation (FUSION) project. Together, these sources help build a picture of how people really travel day to day. The evidence also tracks how travel habits have changed over time and how different groups use transport differently.

In line with the Code of Practice for Statistics, we are publishing all new supporting data alongside the strategy, including the NTS trip chain analysis, and additional NTS tables including mode share split by London and outside London. Anonymised and aggregated versions of the FUSION, alongside all the survey questionnaires and the code for an analysis dashboard, are available

through the Engineering and Physical Sciences Research Council (EPSRC) Geographic Data Service².

Insights have also been included from respected international organisations like the International Transport Forum (ITF) and the Organisation for Economic Co-operation and Development (OECD), to enable cross-country comparisons where relevant.

Extent of overall domestic travel

Domestic travel increased significantly over the second half of the twentieth century, driven by technological advances alongside economic and social change which made travel more feasible and affordable³. Trips per person increased by 15% between the mid-1970s (when NTS data

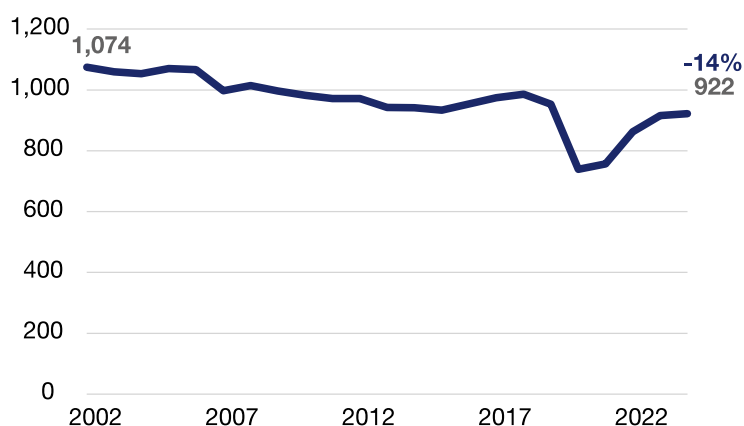
collection started) and the early 2000s. As more people have gained access to a car, the total distance travelled per person per year increased by a much greater amount (50%) over the same period, from 4,740 miles in 1975 to 7,193 miles per person per year in 2002, when the distance travelled peaked.

However, since the early 2000s, personal travel has declined, resulting in fewer trips and shorter distances per person over the year. Older people (aged 70 and over) were an exception, continuing to travel more until the extensive disruption of travel during the coronavirus (COVID-19) period when restrictions on travel reduced overall mobility.

Changing trip purposes

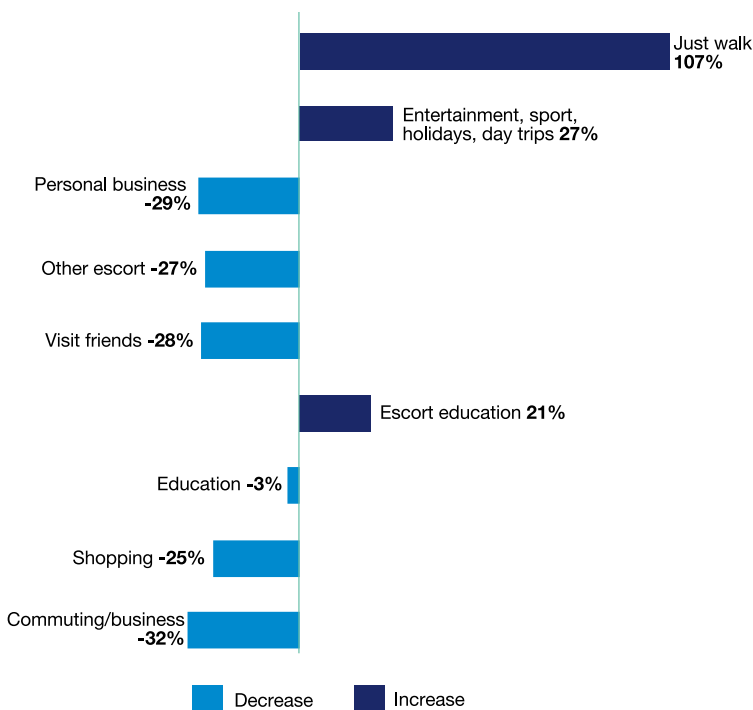
People travel for a diverse range of reasons, and in recent years, we have seen changes in the most common reasons for domestic travel. While shopping and commuting remain the top two purposes for taking trips, the extent of travel for both of these reasons has decreased over the last 25 years, likely due to lifestyle changes, such as the growth in online shopping and remote working. In contrast, the extent of travel for most leisure purposes (such as just walking and travelling for entertainment, sport, holidays and day trips) has increased, although people are visiting friends less. Travel to take children to school or other education settings (known as education escort) has also increased, while the extent of travel for education itself has remained broadly steady⁴.

Figure 1: Trips per person per mode, England 2002 to 2024



Source: NTS0101, 2024

Figure 2: Change in trips per person per year, by main purpose: 2002 to 2024



Source: NTS0403, 2024

Note: leisure as a combined category is not presented (NTS defines this to include visit friends at home and elsewhere, entertainment, sport, holiday and day trips) because each component shows different trends; NTS0409).

Changes in how we travel

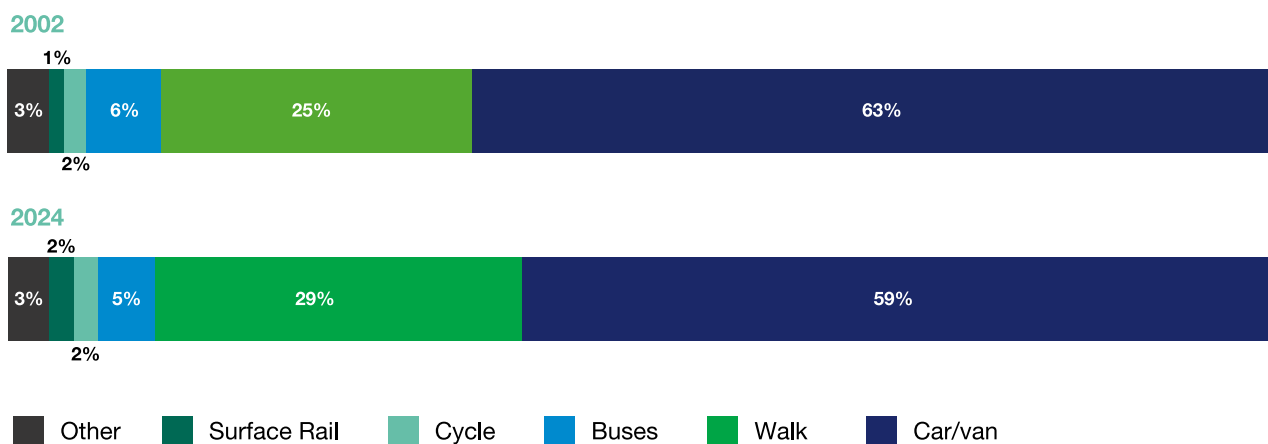
Car is the dominant mode of travel across England, and the share of trips by car has remained similar at around 60% since 2019. The average miles travelled by car has also remained broadly stable in recent years, with 4,605 miles per person in 2024. In contrast, the proportion of trips walked has increased by 7% since 2019, representing 29% of all trips and 81% of all trips under 1 mile in 2024⁵. A small proportion of trips are taken via public transport (in 2024, just 4% of trips were by bus and 2% were by rail) or cycled (2% in 2024)⁶.

Few trips (7% in 2024) are completed using more than one mode of transport. However, it is possible that the focus on single trips (a one-way course of travel for a single purpose) may underrepresent the full extent of multimodal travel as over the course of a day, people are likely to travel for multiple purposes within the same journey, commonly referred to as trip chains. Evidence on the extent of these types of travel patterns and how such journeys are completed is detailed later in this section [see section 2.10 Understanding complex travel patterns: trip chains, beginning on page 17].

Travel was severely disrupted during the COVID-19 period. Since then, road transport (excluding buses) has broadly recovered, with overall traffic levels consistently close to or above pre-COVID-19 levels, reaching 106% of its pre-pandemic baseline on 8 September 2025⁷. However, this headline figure masks variation across vehicle types: weekday car usage remains lower, while light commercial goods vehicle traffic has increased, reflecting the increased use of online services and deliveries. Heavy goods vehicle (HGV) traffic has also shown a different recovery pattern. In contrast, public transport usage continues to lag behind pre-COVID-19 levels.

Bus use has been declining since the 1970s, largely due to increasing car ownership. Over this period, the proportion of households without access to a car or van fell, from 48% in 1971 to 22% in 2024⁸. In 2009, the downward trend in bus use accelerated for areas outside London, contributing to a 38% decline in usage across England between 2009 and 2024⁹. Since the COVID-19 pandemic, buses have also seen a slower recovery than trains. For example, bus use outside London reached 86-88% of usual weekday pre-COVID-19 levels (comparing Monday to Friday of the week of 3rd November 2025 to the equivalent week in 2019).

Figure 3: Average proportion of trips per person per year by main mode, 2002 compared with 2024



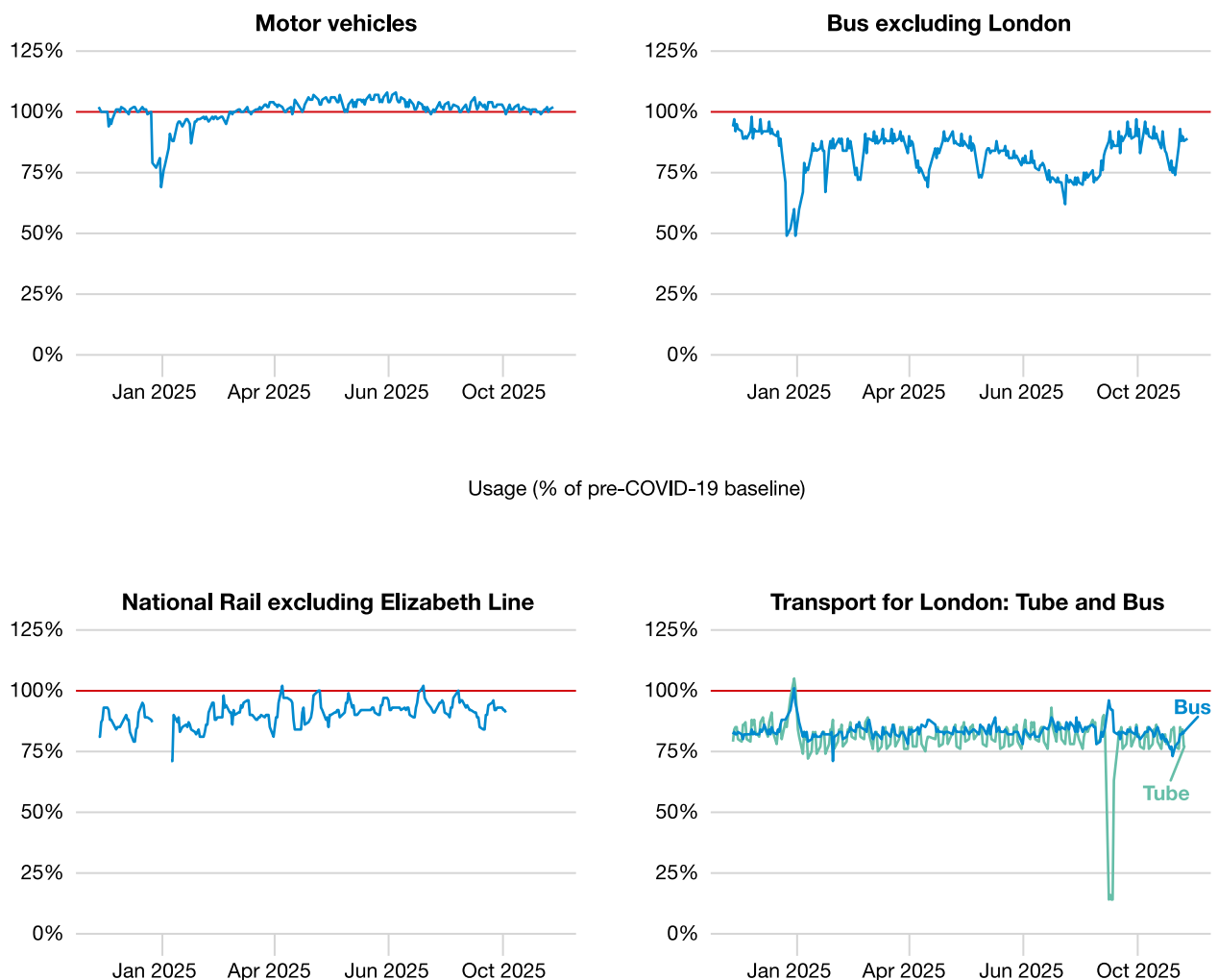
Source: NTS0303, 2024

Rail use also declined between 2009 and 2023, but less dramatically, and has recovered more strongly since the COVID-19 pandemic, with National Rail (excluding the Elizabeth Line) reaching between 91-93% of their pre-COVID-19 Monday to Friday weekday average for w/c 29 September 2025.

The Elizabeth Line, although physically connected to the London Underground network, is classified

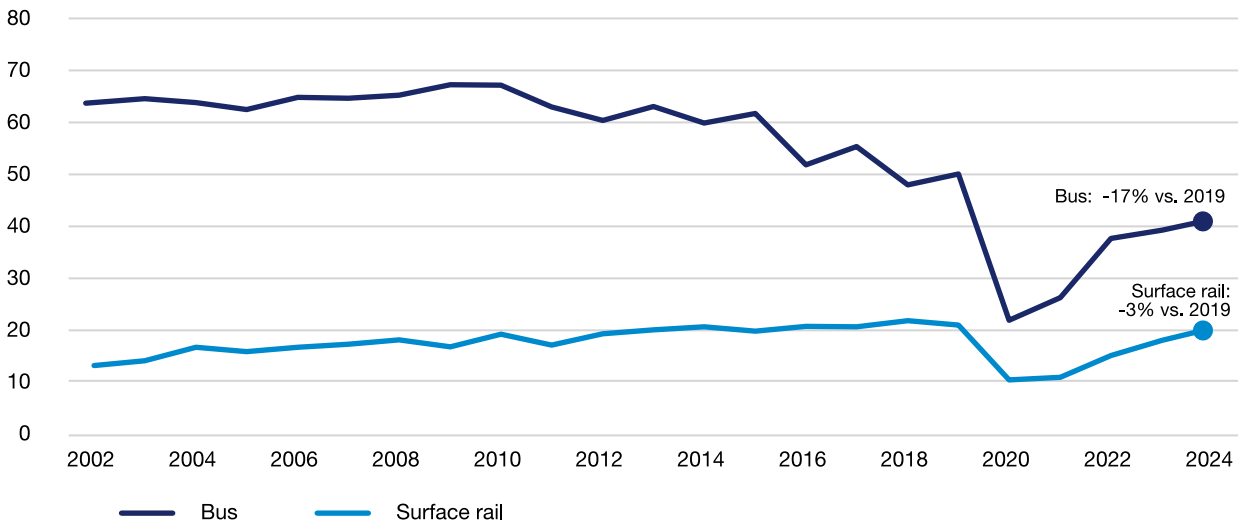
as a heavy rail service and forms part of National Rail not the Underground. Its opening in May 2022 led to a sharp rise in rail journeys. Including Elizabeth Line in the data pushes National Rail usage figures for the same period to 101-103% of pre-COVID-19 levels, skewing the overall picture of rail recovery across the country if considered together¹⁰.

Figure 4: Daily domestic transport usage as a proportion of pre-COVID-19 levels, Great Britain



Source: Official Statistics on Domestic Transport Usage by Mode. Usage is shown as a percentage of pre-COVID-19 baseline; baselines used vary between modes (see the methodology note for further information).

Figure 5: Average number of trips per person per year by bus and rail, 2002 onwards

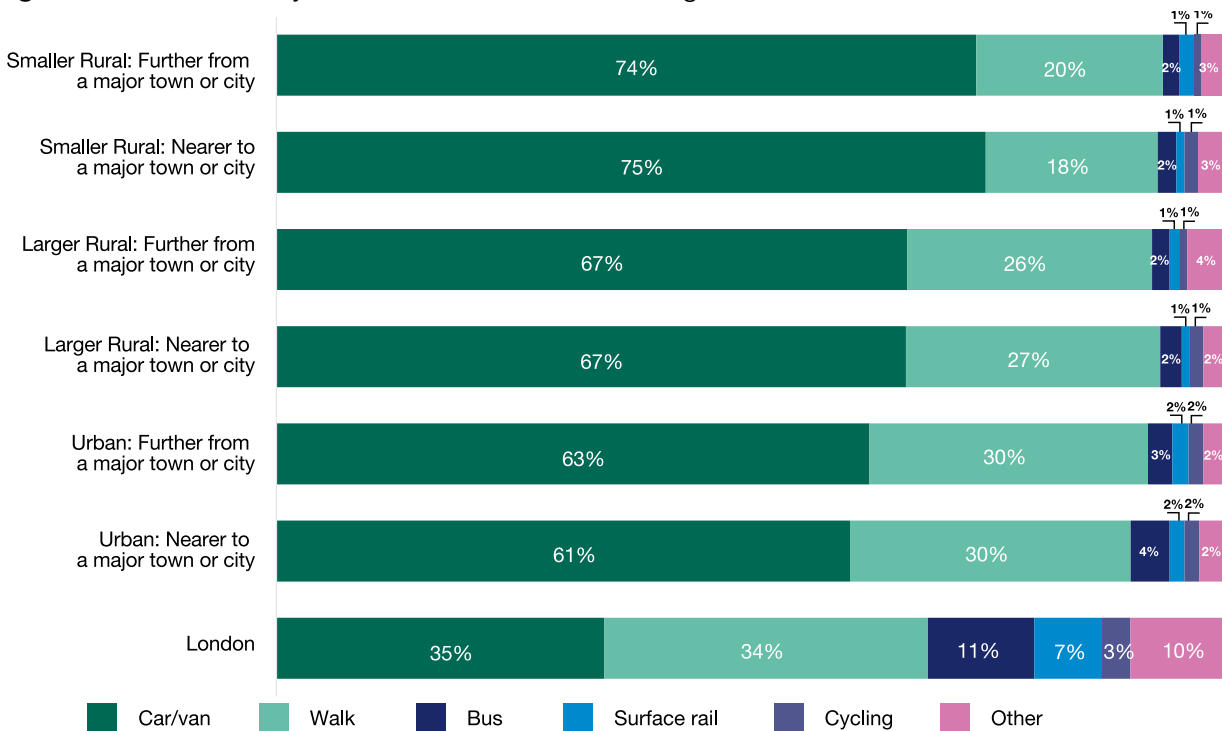


Source: NTS0303a, 2024

Regional differences

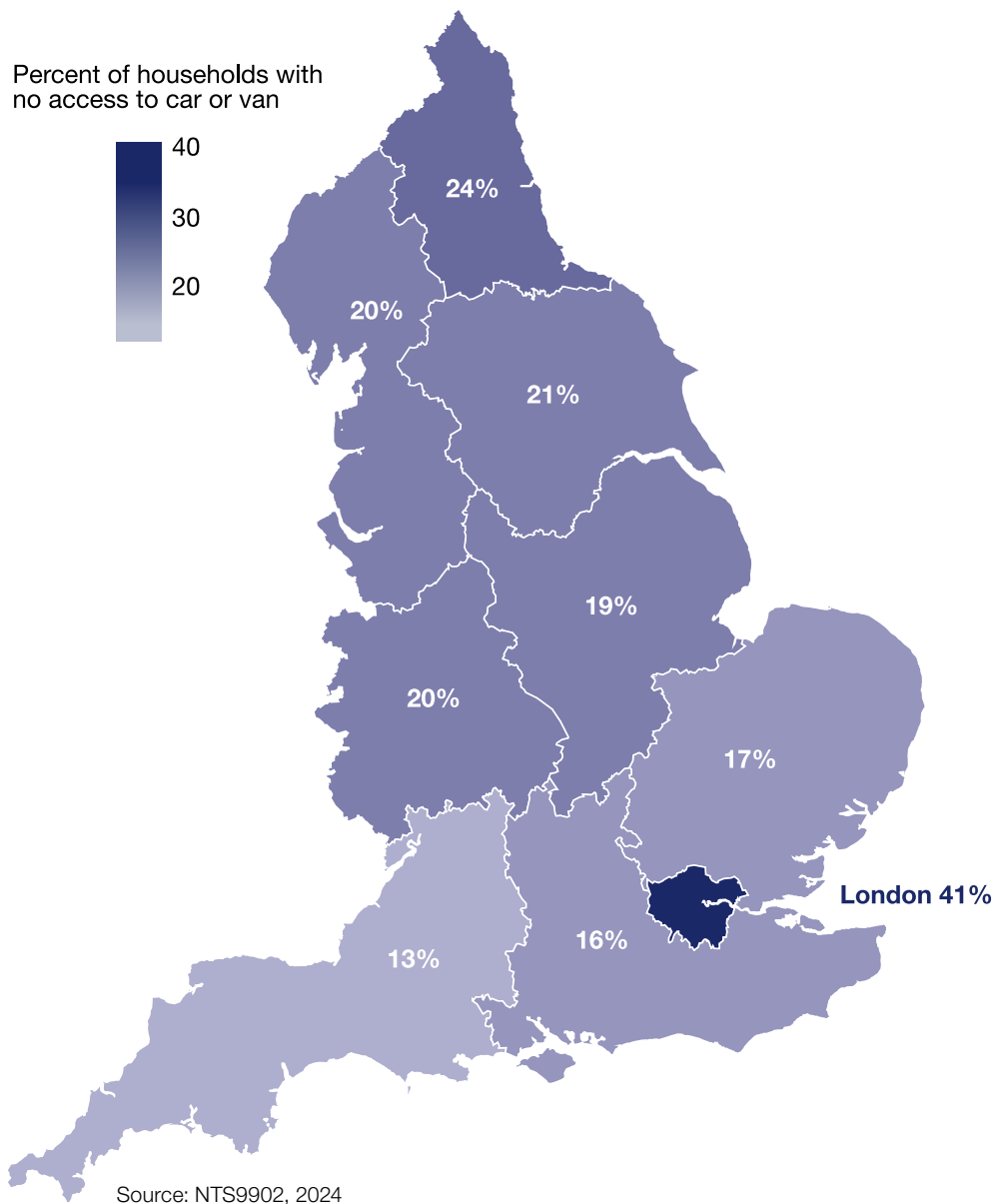
The way people travel across regions varies considerably—both in terms of how people in urban locations move around compared to rural, and in London, which is the only area of England where car is not the dominant mode, with only 35% of trips in 2024 made by car or van.

Figure 6: Mode share by rural-urban classification in England



Source: National Travel Survey 2024 Adhoc statistics. *Other includes taxi and minicab, motorcycle, London Underground and all other forms of public or private transportation reported. The percentages above show the proportion of trips for each mode for each area type.

Figure 7: Proportion of households with no access to car or van, England



The variations in car usage are also reflected in the different proportions of public transport use and car ownership levels. For example, around one in five trips in London used public transport as the main mode in 2024. Car ownership levels in the North East are lower (24% of households without access to a car or van) than in the South West (just 13% of households without access to a car or van)—with London once more an outlier¹¹ (41% of households without access to a car or van).

Multimodal travel is more common in London than elsewhere with trips being around six times more likely to be multimodal in London than in the North West or East Midlands (18% vs. 3%).

Recent trends in bus also differ regionally. Outside London, bus usage increased between 2005 and 2009 (peaking at 2.4 billion passenger journeys in 2009), after which it experienced a gradual decline until 2019, when it fell to 2.1 billion passenger journeys. In London, bus use continued to increase until 2013, when it started to decline gradually in line with the rest of the country. However, recent data reflects the sector’s continued recovery from the COVID-19 pandemic¹² as shown in Figure 8.

For bus usage, Londoners led with an average of 83 trips per person in 2024, followed by the North East (62) and North West (44) — all above the national average of 41. At the other end, the East of England (21), West Midlands (29) and East Midlands (31) had the lowest bus usage.

For rail, London again leads with the highest average number of rail trips per person in 2024 (53), followed by the East of England (27) and South East (26)—the three regions above the national average of 21. The lowest rail usage is seen in the East Midlands (6), North East (7), South West (8), and West Midlands (8)¹³.

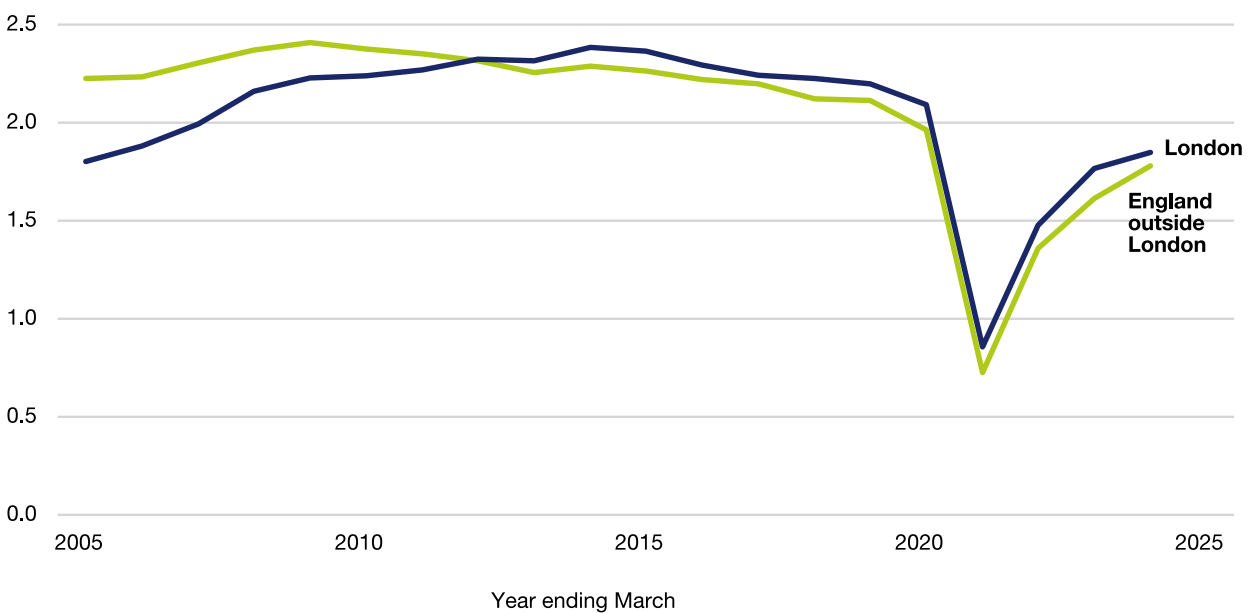
International differences: Europe

National travel surveys vary widely, making direct comparisons between countries difficult. To support international benchmarking, we have used passenger-kilometres (pax-km), a recognised metric by Eurostat¹⁴. Pax-km gives more weight to longer journeys, so car and aviation appear more dominant via this metric, while trips made by walking and cycling contribute less due to their shorter distances.

Using this methodology, Great Britain has a relatively high car mode share when compared to other European countries. In 2023, 85% of pax-km in Great Britain were by car¹⁵—second only to Lithuania and notably above the EU average of 71%¹⁶. Given that England accounts for approximately 87% of Great Britain’s population¹⁷, the car mode share observed for Great Britain is likely to be broadly representative of travel patterns in England.

Domestic aviation accounts for a much smaller share of passenger journeys in the UK (Great Britain and Northern Ireland) than in many European countries.

Figure 8: Billions of local bus passenger journeys



Source: [DfT bus statistics](#), BUS01: Local bus passenger journeys for year ending March.

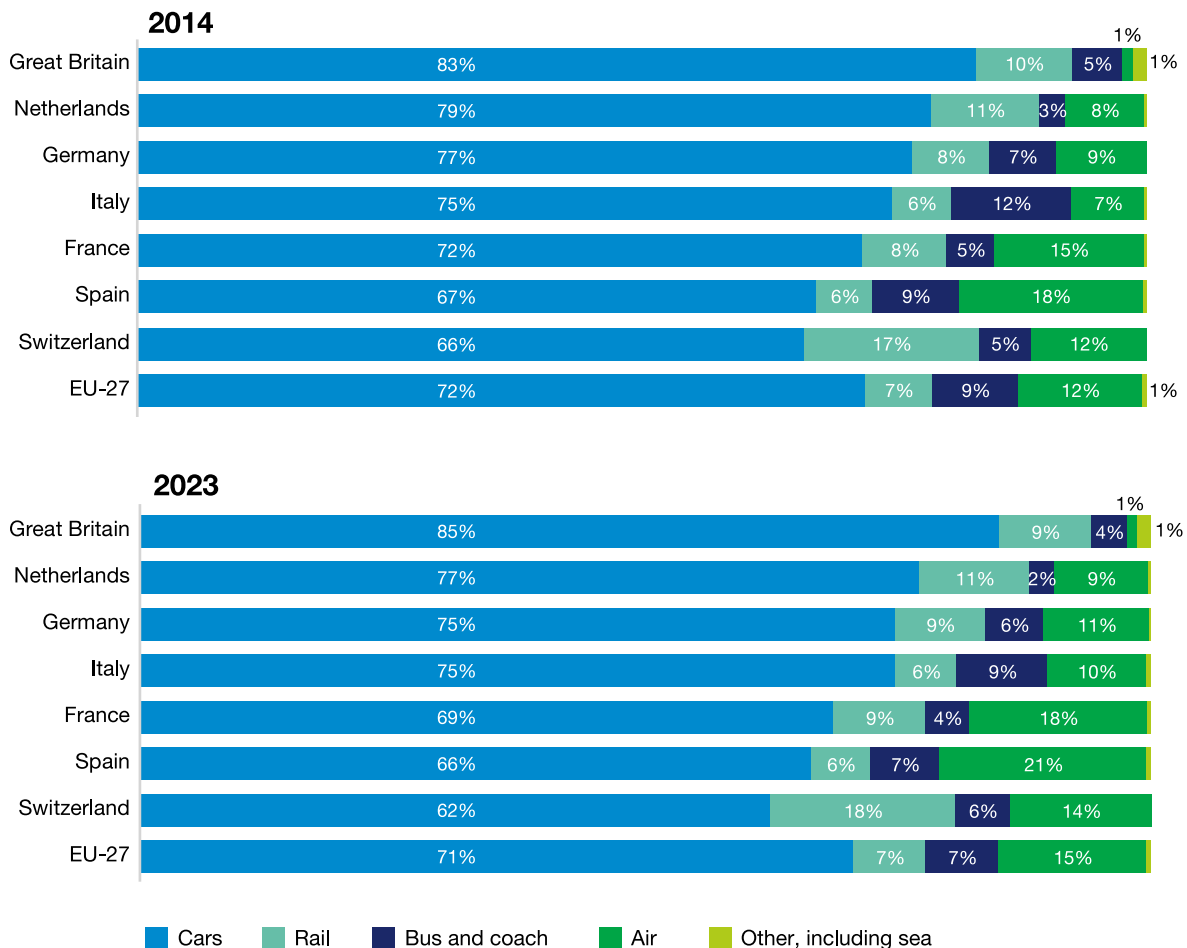
In 2023, only 12% of passengers at UK airports were on domestic flights¹⁸. When comparing mode share by passenger-kilometres for Great Britain, which excludes routes to Belfast¹⁹, aviation's role is even smaller compared to other European countries.

When looking at the top 7 European economies by GDP with a similar share of pax-km by car to Great Britain, Germany and the Netherlands are the closest. However, people in Germany and the Netherlands take fewer car trips than those in the UK, but they drive longer distances—averaging

13,000 km/year in Germany and 11,000 km in the Netherlands^{20, 21} compared to around 10,000 km or England²². UK cities tend to have more fragmented urban layouts and congestion, which encourages shorter, more frequent car trips²³.

Rail and bus usage varies across Europe, with countries like Switzerland (18%), the Netherlands, and Austria (~11%) showing higher rail shares than the UK. For buses and coaches, Malta (16%), Ireland (15%), Hungary, and Romania (12%) lead, indicating stronger public transport uptake in some regions.

Figure 9: Mode share by passenger-km for the top 7 economies in Europe, 2023



Source: Eurostat, Transport Statistics Great Britain: TSGB0101 passenger transport by mode. UK equivalent figures not available. EU-27 are defined on the official EUROSTAT page.

Disability and transport use

The proportion of disabled people in the population is likely to increase in the coming years, driven in part by an ageing population. ONS projections show that the proportion of our population aged over 65 could rise from 19% to 22% by 2035²⁴. Just under a quarter (24%) of the population is disabled now, and prevalence increases with age—two thirds of people aged over 85 have a disability²⁵.

Disabled people travel less than non-disabled people. Disabled adults over 60 took about a third (35%) fewer trips than their non-disabled counterparts, while those aged 16-59 took 22% fewer trips than their non-disabled peers in 2024²⁶.

Compared with non-disabled people aged 16 or over, disabled adults made a higher proportion of their total trips (20% vs 13%) as car passengers, while taking fewer trips as car drivers (40% vs 47%). Both disabled and non-disabled people made over 59% of all trips by car in 2024²⁷. On average, disabled people used the bus more, taking 6% of their trips by bus compared with 4% amongst non-disabled people. In terms of trip purpose, the largest difference between disabled and non-disabled people was in trips for commuting, with disabled people commuting less (8% vs 15%)²⁸.

Gender and transport use

Women of all ages make more trips than their male counterparts but travel shorter distances over the course of a year. In 2024, women made 4% more trips than men, compared to 6% more in 2010. They travelled 14% less distance than men in 2024, down from 18% less in 2010, suggesting that gender differences in travel patterns are gradually narrowing over time²⁹.

Women consistently use the bus more than men. In 2024, women aged 30 to 39 took nearly twice as many bus trips as men in the same age bracket, with their usage 20% higher across all age groups. This is not unique to

England; a study by the ITF which looked at travel patterns in 10 cities across developed and developing countries confirms these findings. It found that women tend to use buses more than other modes, partly because buses stop more frequently and are suitable for shorter, multipurpose trips³⁰.

Women commute less than men, but the extent of this difference has fallen over time. In 2002, men in England aged 21 and over were nearly 50% more likely to commute than women of the same age, but by 2024, that gap had almost halved, with the same group clocking 27% more commuting trips³¹. This reflects changes in women's working patterns, with the extent of full-time work increasing and part-time work reducing. Between 2019 and 2025 there was a 13% increase in the number of women working full-time and a 7% decrease in the number of women working part-time. However, part-time work still remains more prevalent among women with 36% of employed women in part-time roles compared to just 14% of men³².

For women aged 30 to 39, escorting children to education (nursery and school) is the second most common reason for travel, with these trips increasing over time, reflecting their caregiving roles. Escorting children to education makes up 8% of all trips made by women; however, the proportion of men making these trips has more than doubled since 2002 reaching 5% in 2024³³.

Although walking is the most common mode of travel to school, many children are still escorted by car—43% of 5 to 10-year-olds and 30% of those aged 11 to 16. While we can't fully explain why escorting by car remains high and has shown a slight upward trend over time, parents most often cite the school being too far (39%), the journey taking too long (15%), or their child being too young to walk alone (10%), suggesting that distance, time, and safety concerns continue to shape school travel choices³⁴.

How income affects transport use

Extent of travel and modes used

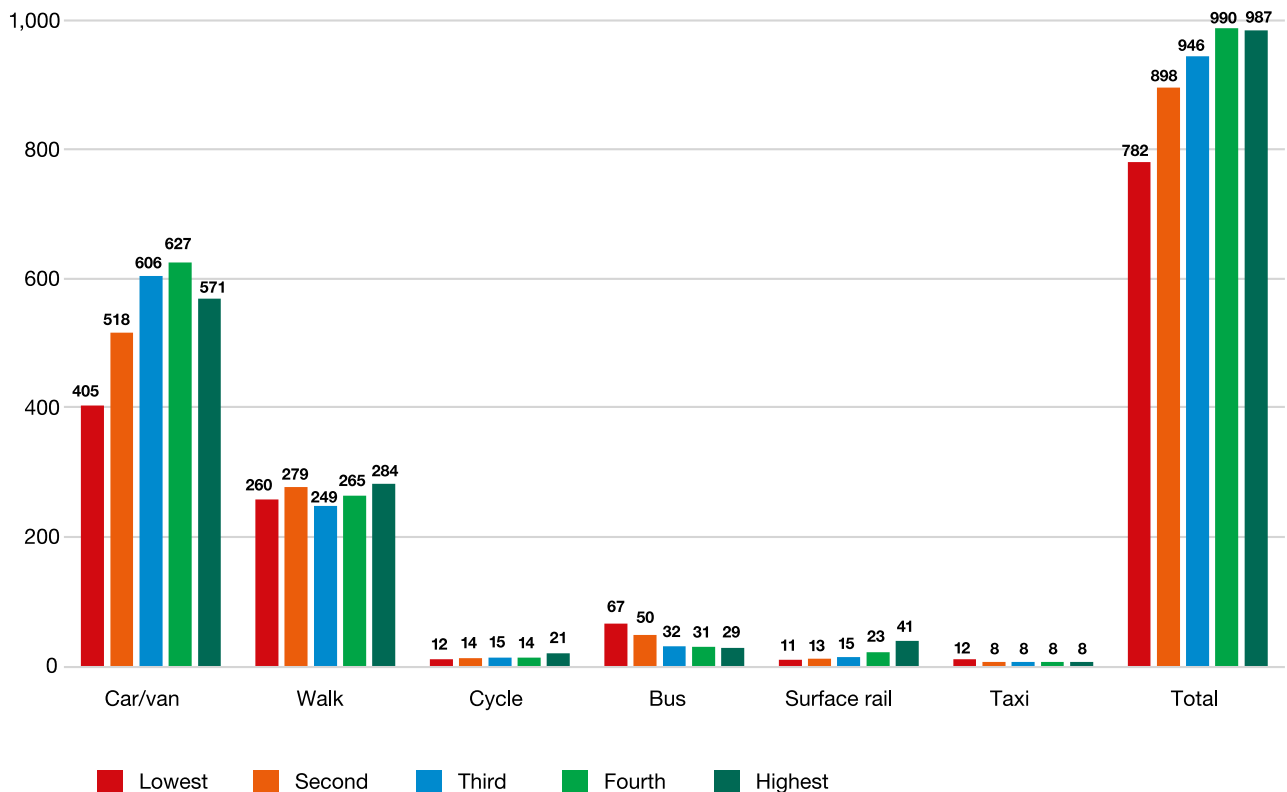
Lower-income households travel less—in 2024, the poorest 20% of households took 782 trips per person on average, compared to 922 on average across all households. And when they do, they rely more on walking and buses. The poorest 20% use buses more than twice as much as the richest but drive 41% less; bus usage decreases steadily as income rises³⁵.

Lower-income groups are less likely to own a car. In 2024, 40% of those on the lowest incomes had no access to a car, compared to just 14% of

those on the highest incomes³⁶. This lower level of car ownership likely contributes (alongside poor public transport options and the relationship between low income and disability) to higher taxi use amongst the lowest earning households, who take more taxi trips per person per year than all other income groups.

The second richest group, the fourth income quintile, use cars and vans more than the richest. This may be due to higher rail use as well as more walking and cycling observed amongst the richest group³⁷.

Figure 10: Trips per person per year by mode and income quintile, 2024



Source: NTS0705, 2024

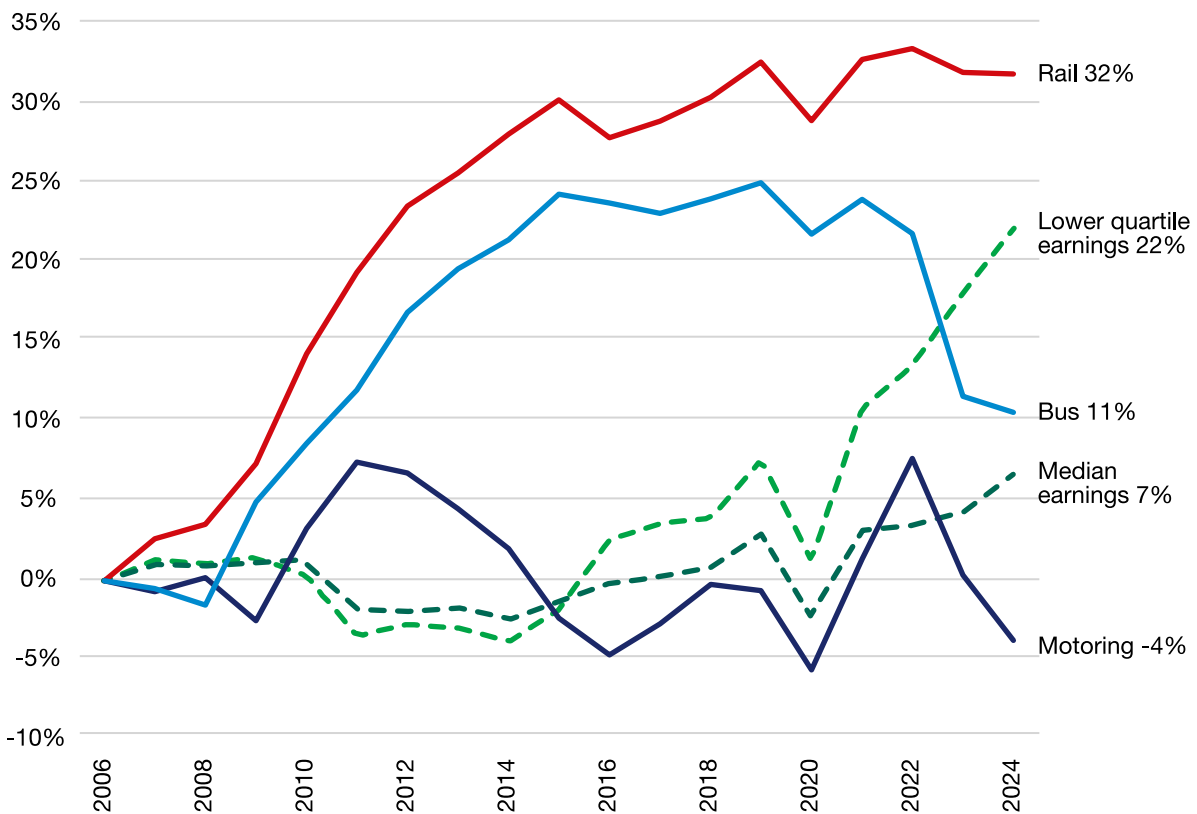
Transport costs

Trends in the cost of transport over recent years are more likely to impact those who rely on rail since train fares have increased faster than earnings and inflation, while motoring costs have fallen in real terms³⁸. Bus fares were rising at a similar rate until recently with the introduction of the £2 bus fare cap in 2023, followed by the £3 bus fare cap from 2025.

Spending on transport

Lower-income households travel less and spend less on transport than higher income groups in absolute terms. The poorest 20% also spend a lower percentage of their total expenditure on transport. However, rising total expenditure relative to income means that the poorest 20% now spend a bigger share of their income on transport than any time in the last 12 years, and are now spending more than any other group, even though they spend less in absolute terms³⁹.

Figure 11: Real terms percentage change in the cost of transport since 2006

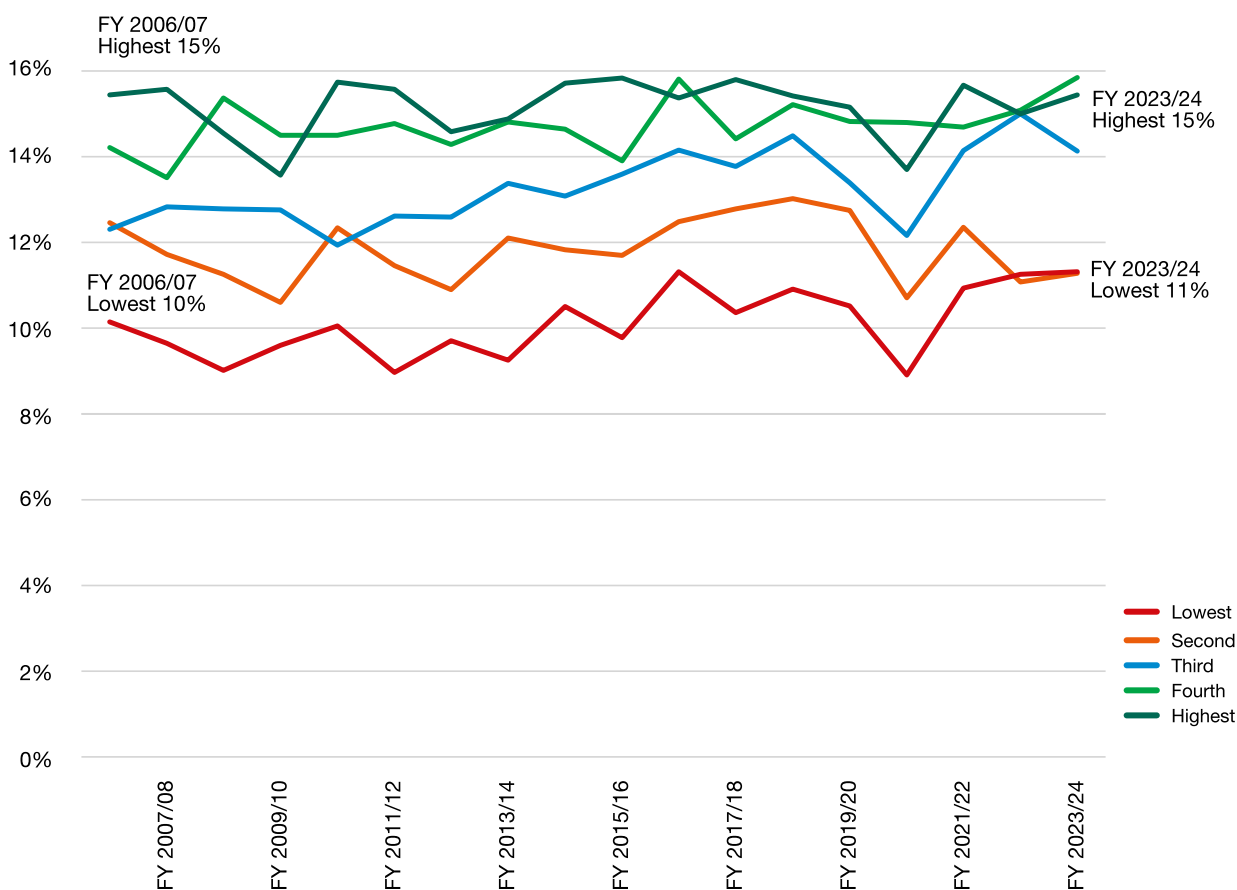


Source: ONS MM23, DfT local bus fares index BUS04di and ASHE for Weekly Earnings (table 5). Real figures calculated against GDP deflator. ASHE is provisional for 2024.

Spending on transport by the lowest earning households is less likely to be discretionary, i.e. something that cannot be reduced further, as it is less likely to be non-essential travel. These households are far less likely to go on holiday or fly (in 2019, only a third flew abroad in the last

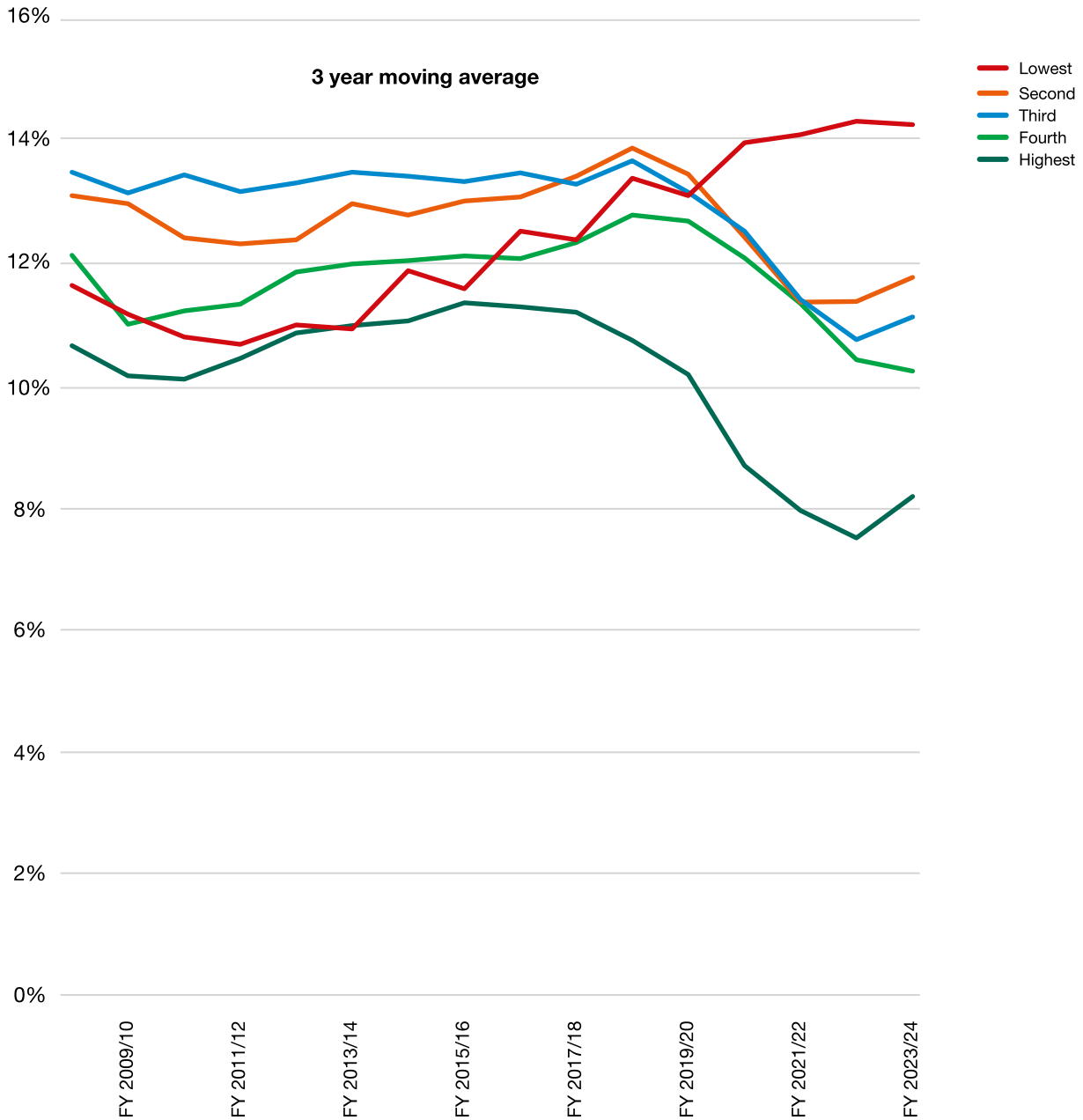
12 months, in comparison to 75% of the richest who also flew more often⁴⁰), hence they were the only group who's relative spend on transport continued to rise during the COVID-19 pandemic, despite international travel restrictions.

Figure 12: Transport expenditure as a share of total household expenditure by quintile, FY2006/07 to FY2023/24



Source: Table 3.1E Family Spending Workbook: Detailed household expenditure by equivalised disposable income decile group (OECD-modified scale)

Figure 13: Share of income spent on transport by income quintile: 3 year moving average for FY 2008/9 to 2023/4



Source: Equivalised disposable income is used to account for household size and composition, making comparisons of transport cost burden across households more fair and consistent. Table 3.1E Family Spending Workbook: Detailed household expenditure by equivalised disposable income decile group (OECD-modified scale). Income data is from ONS Taxes and Benefits: Table 13: Average household incomes, taxes and benefits of ALL individuals by quintile group, 2023/24, UK.

Understanding complex travel patterns: trip chains

Traditional analysis of personal travel tends to count trips (a one-way course of travel for a single purpose) as isolated events, tracking their number, purpose, and mode. This approach does not fully capture how people travel in their day-to-day life, where different trips for different purposes may be linked together in a single multipurpose journey, known as a trip chain. Trip chaining analysis offers a more realistic view by linking multiple trips into a single travel sequence, like dropping children off at school, picking up shopping, and heading to work. This approach reveals the complexity of daily routines, showing how activity interdependence and practical constraints, like the need for flexibility can influence travel choices, often making public transport less viable for multistop journeys.

Improving the understanding of how people really travel leads to smarter transport planning and more inclusive policies that better meet people's needs, especially for groups whose travel is more complex, e.g. carers, parents and disabled

people. For example, trip chain analysis can be used in activity-based modelling to design services that take into account how specific groups use the transport system⁴¹.

To understand more about the extent of trip chaining and how such journeys are completed, we commissioned two pieces of work to support the development of the Strategy:

- A bespoke analysis of NTS data was carried out to better understand the extent of trip chains and how they were completed, using travel diaries where people record every trip they make in a day to piece together trip chains. In this analysis, trip chains were constructed from NTS travel diaries, where trips made between the anchor points of home, work and education were linked together in the order they happened. They were defined as a series of two or more trips which start or end at work or education, and a series of three or more trips which start or end at home. For further information on methodology, please see the [National Travel Survey factsheets](#).

Figure 14: Example of a common trip chain: Home > School > Shopping > Work

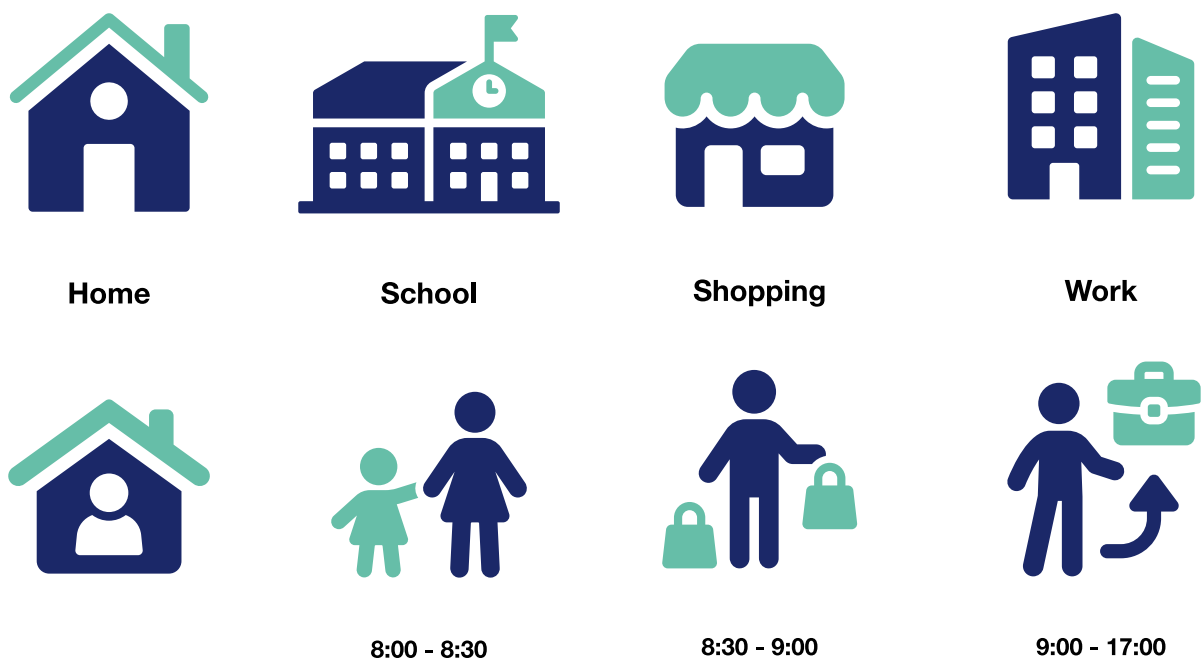
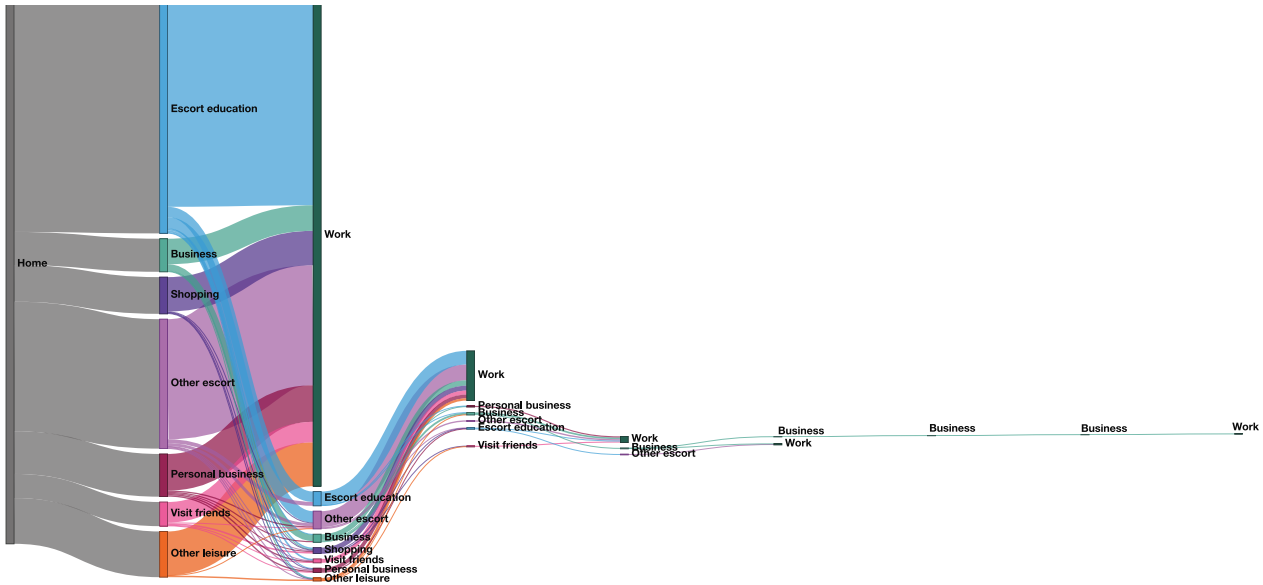
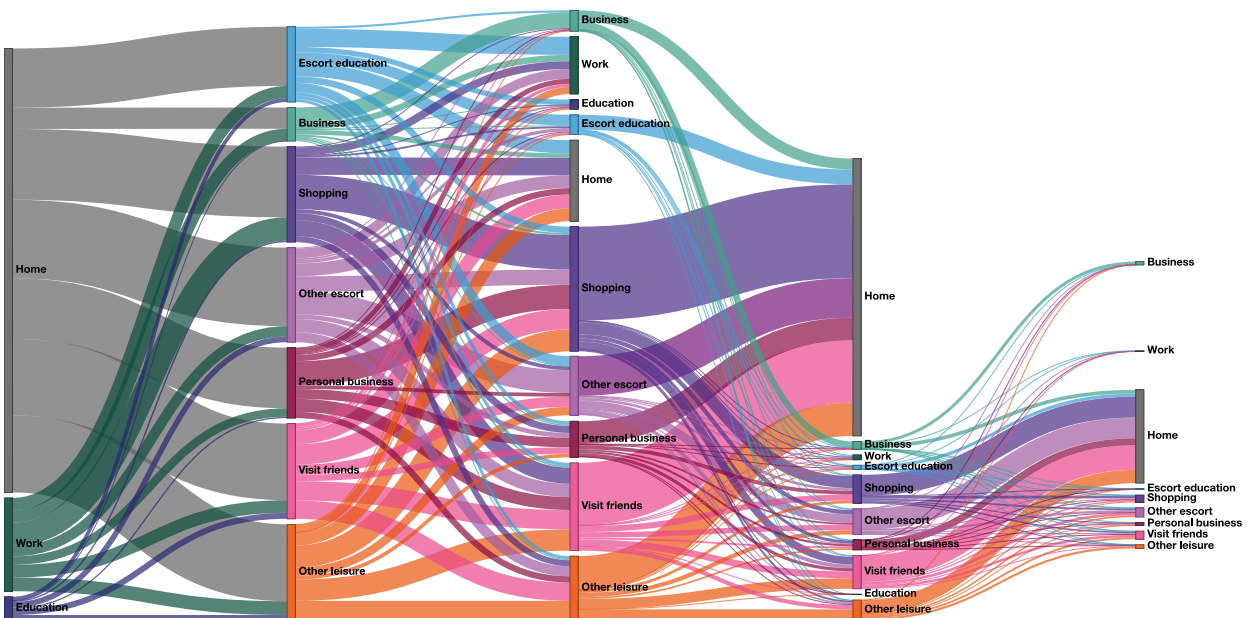


Figure 15: Flow of trip purposes for trip chains with intermediate stops between Home and Work: England 2024



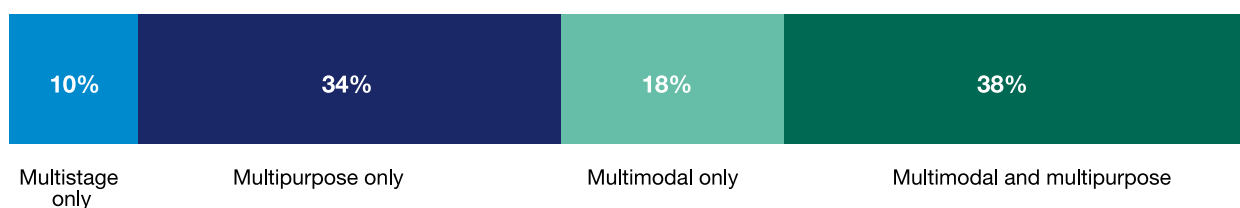
Source: National Travel Survey factsheet: Trip Chaining 2024

Figure 16: Flow of trip purposes for all trip chains of up to 4 links: England 2024



Source: National Travel Survey factsheet: Trip Chaining 2024

Figure 17: Types of journeys described by FUSION Wave 5 participants



Source: FUSION Survey data, Wave 5 (Base n=2335).

- The inclusion of questions about multipurpose or multistage journeys in wave 5 (conducted in March 2025) of the FUSION project⁴². This asked participants to describe recent multistage journeys in detail, including each stage’s mode and purpose. Therefore, this data captures journey complexity as experienced by the respondent.

A comparison of the two approaches, including key limitations and definitions, is summarised in the table in Annex A.

The key findings from both approaches are described below.

NTS trip chain analysis

From the NTS analysis, DfT estimates that 12% of all trips made were part of longer trip chains. The most common size of trip chain included two intermediate trips between anchor points: these three trip chains accounted for around half of all trip chains. The most common chain was Home > Shopping > Shopping > Home (5% of chains), reflecting the fact that shopping is the single most common trip purpose (18% of all trips were for shopping in 2024⁴³). There is, however, wide variation within trip chains with some individuals making up to 12 trips in a chain. Around 15% of trip chains involved the use of more than one mode of transport.

Women of all ages are more likely to trip chain, with 14% of trips forming part of a trip chain, reducing to 11% by men. The difference is greater if age is considered. Trips undertaken by women aged 30-39 were more than three times as likely to be part of a trip chain than those undertaken by men aged 17 to 20 (17% of trips undertaken

by women aged 30-39 were part of trip chains, compared to just 5% for men aged 17-20). Of trip chains from home to work, the most common trip chain included dropping children off at school on the way, which was done in just under a third of these trip chains (28%). This pattern is most common among women aged 30 to 49. For example, among women aged 30 to 39, school drop-offs make up about 17% of all trips, compared with only 7% for men of the same age. For those aged 40 to 49, the gap is similar; 17% for women versus 11% for men. International evidence suggests this is not unique to England. Research by the US Department of Transportation also found that trip chaining increased for those with children under 5 (by 54% for working women and 19% for working men⁴⁴). However, transport planning typically does not consider women’s specific needs when designing bus networks.

Most trip chains (89%) involved using a car (as driver or passenger), while in urban areas, there is more public transport use. DfT research indicates that for people with caring duties, flexibility is important, which can lead to a preference for cars⁴⁵. However, an ITF study shows that if public transport is better connected and more responsive to these patterns, women may choose it over driving⁴⁶. Having said that, the ITF research also shows that trip chaining can be costly and time-consuming, posing challenges for those relying on public transport.

A greater proportion of trips in rural areas are part of a trip chain (14%) compared with urban areas (11%).

FUSION findings

The FUSION findings aligned well with NTS analysis though there are likely to be small differences due to underrepresentation of older, less mobile, car-reliant individuals in the FUSION survey sample.

Three quarters (76%) reported having had a multipurpose or multistage journey in the past 4 weeks. 52% described a journey with more than one purpose (matching the NTS definition), while 54% said they had used more than one mode of transport. One in ten (10%) described journeys that had a single purpose and single mode of transport—often due to having to make a stop, like transferring to a different bus route.

Crucially, of those who did use more than one mode, satisfaction was high, with 94% satisfied or very satisfied with the ease of switching. The most common reason for high satisfaction was not having to wait too long to change mode (48%). Top reasons for using multiple modes were speed (34%), lack of direct access (32%), and necessity (29%).

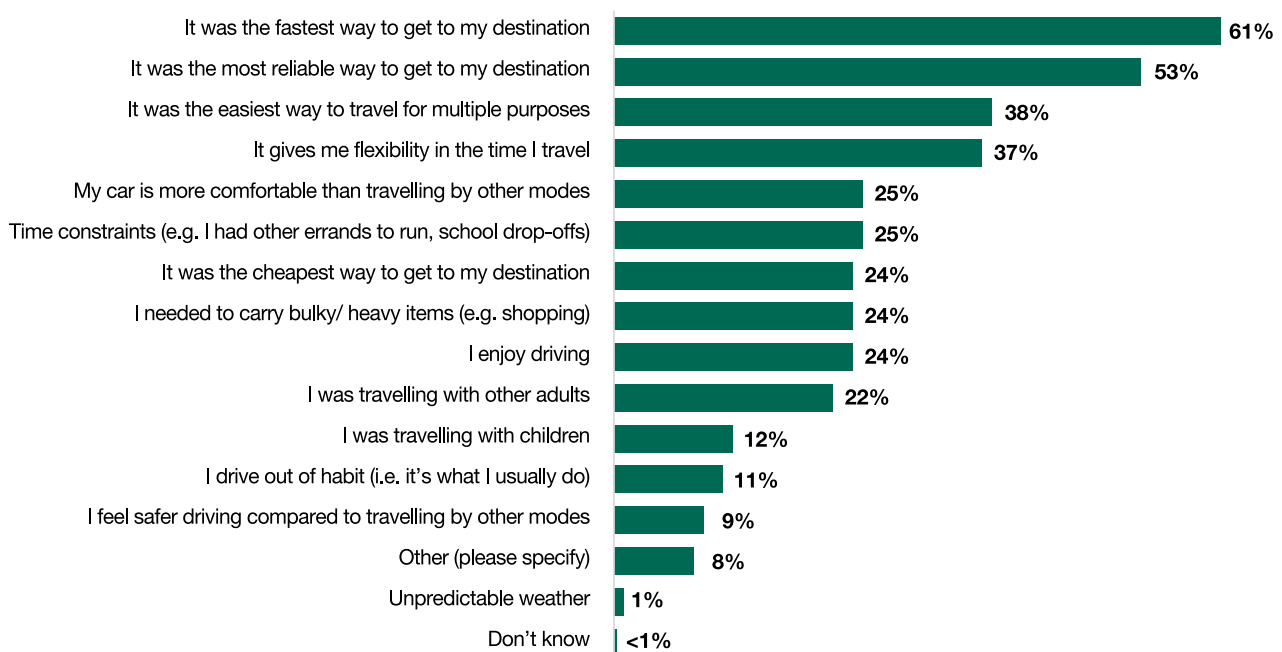
Around two fifths (43%) of multipurpose trips lasted under an hour. There was an average of 1.8 stops per journey, with a quarter making 3–4 stops (based on 2,769 responses).

Car use accounted for 74% of journeys, followed by walking and wheeling (48%), bus (18%) and train (14%). Wheeling includes travelling using any mobility aid that is not a motor vehicle, including manual or powered wheelchairs, mobility scooters, rollators and other walking frames.

Top reasons for using the car were speed, reliability, ease and flexibility. Even short trips (under 1 mile) within multistage journeys often involved driving; 70% of car users who reported at least one of the legs of their journey was under a mile said walking was not feasible due to bulky items or time constraints.

Commuting to or from work featured in over half of all multipurpose journeys, with peak travel times between 07:00 and 09:59 accounting for around 40% of journeys.

Figure 18: What were your reasons for using a car on your multipurpose and/or multimodal journey?



Source: FUSION Survey data, Wave 5 (Base n=1,942)

4 Views and experiences of domestic transport

Key points

The evidence shows that while most users of different modes of transport are satisfied with their recent journeys, people's expectations of what the transport system should offer are not always met, and this can affect the viability of some modes from being considered as an option at all:

- Drivers are frustrated by incidents and congestion affecting journey time reliability
- Buses need to be more frequent and reliable
- Cost and the perception of poor value for money are the key barriers to train use
- Safety concerns prevent people from cycling, and to a lesser extent walking
- Destinations are often too far for walking to be viable

Women and disabled people face additional challenges across different transport modes. Women are more concerned about their safety than men, while disabled people feel less confident travelling and are less satisfied with all modes compared to non-disabled people.

Sources in this section

The evidence in this section draws largely from surveys with representative samples of the general public, as well as some qualitative research—focus groups and interviews, exploring barriers and enablers to using specific modes of transport. It also considered further surveys and some qualitative research with users of specific modes about their satisfaction and experiences. The evidence exploring views and experiences of integrated transport (combining modes) is more limited—we include the findings of two recent qualitative studies.

Expectations from transport

The evidence highlights some common expectations that people have for transport, drawn from a number of sources all referenced later in this section. People expect transport to:

- Enable complete journeys, taking them from where they are to their end destination (i.e. end to end).
- Support them in travelling when they want and in being able to change their plans flexibly, with planning that is easy.
- Offer a reliable service which they can trust to be on time and not to take too long.
- Offer a service provided at a reasonable price, that they can afford.
- Feel safe, comfortable, and respected—free from concerns about crime or accidents.

These expectations are not always met. Some users face particular challenges across modes, outlined below.

Two surveys reveal that women are more likely to have concerns about their safety, particularly in relation to crime and harassment than men. In the 2023 National Travel Attitudes Survey of people aged 16 and over, women were more likely to report feeling unsafe on public transport than men (76% of men said they never or hardly ever felt unsafe compared to 61% of women) and were more concerned about the risk of harassment and violence (37% and 38% compared to 23% and 27% of men). They were also more likely to report having taken precautions to increase their personal safety when walking, cycling or using public transport (only 37% of men have ever taken any precaution at all) and to say that they avoid travelling alone when it is dark (63% of women said this, compared to 34% of men)⁴⁷.

A more recent survey exploring personal safety on public transport found that women (especially young women aged 18 to 34) tended to feel much less safe on public transport than men (24% of men reported feeling very safe compared to 14% of women). Both men and women felt less safe after dark and when travelling to or waiting at stations or stops (compared to when inside public transport vehicles), but women were more likely to feel unsafe than men in both these situations. Young women were also much more likely to report having negative experiences (e.g. violence or threats of violence, physical intimidation, verbal abuse, theft or attempted theft), on public transport than others, and these experiences are more likely to impact their travel behaviour. Overall, younger women tended to feel unsafe in a much wider range of circumstances than others meaning that using public transport is

a fundamentally different experience for younger women, compared to older men⁴⁸.

Disabled people feel less confident travelling⁴⁹ and those with health conditions expecting to last 12 months or more are less positive about the accessibility of public transport⁵⁰. People with neurological conditions are least positive about the accessibility and comfort of public transport⁵¹. Accessibility is not just related to the provision of physical features; access to accurate information and supportive staff can be vital for a positive experience⁵². Data from the National Highways and Transport Public Satisfaction Survey indicates that while satisfaction levels for provision of public transport information, local bus services, taxis, and cycle routes and lanes are similar between disabled and non-disabled people, satisfaction with local pavements is 10 percentage points lower for disabled than non-disabled people⁵³. A recent Transport Select Committee report suggested that disabled travellers more commonly face issues with the street environment (e.g. uneven pavements, blocked pavements, lack of dropped kerbs and lack of safe crossings) than with public transport services⁵⁴. There is a large gap in satisfaction between disabled and non-disabled people in terms of aviation and nearly 60% of disabled people experience difficulties when using airports or flying⁵⁵.

Other issues are more modally specific where different issues can prevent people from using a mode or lower user satisfaction, as detailed in the rest of this section.

Driving

As highlighted previously in this document, car is the dominant mode of travel in England, accounting for nearly 60% of trips in 2024. Over three-quarters (78%) of households in England own a car with just over a third (34%) owning two or more cars⁵⁶. This suggests a reliance on private car travel which was reflected in DfT's Our Changing Travel research where 52% of people agreed with the statement "I could not get by without my car"⁵⁷. Agreement was higher among certain groups, including:

- People living in rural areas (71%)
- Residents of the South West (60%), East of England (59%) and Yorkshire and the Humber (58%)
- Adults aged 55 to 75 years (60%)
- Those with an annual income greater than £45,000 (59%)

The same survey, however, found that people were using their cars less to save money—around a third (32%) of people were taking fewer trips by car/van.

NTS data reveals that across the population, satisfaction with major roads (including motorways) is higher (over half, 56%, indicate they are satisfied) than local roads (over half, 51%, say they are not satisfied and only 34% are satisfied)⁵⁸. Transport Focus's Strategic Road User Survey (SRUS) indicates even higher levels of satisfaction with major roads amongst those who use them, with 69% reporting being satisfied with their last journey on a motorway or major A road in 2024/25⁵⁹, however, satisfaction levels have fallen slightly since 2022/23.

Research indicates that many drivers are frustrated with incidents (accidents and road works) and congestion which affects their overall journey times and the reliability of their journey time. Analysis of SRUS data indicates that satisfaction with journey time has the greatest influence on overall satisfaction. Other factors impacting overall satisfaction include whether other delays are experienced, actual journey

time compared to expectation, level of traffic and satisfaction with road work management⁶⁰. Satisfaction with the management of roadworks is lower than other aspects (46% of respondents reported being satisfied with this in 2024/25), which is a concern. The NTS asks employed respondents who do not work at home about what difficulties they face in travelling to work. While over half (58%) of those who travel by car, van or motorcycle report facing no difficulties, the most frequently mentioned difficulty is traffic congestion or road works, reported by 35% in 2024, up from 30% in 2022⁶¹.

DfT traffic projections suggest that drivers will face increasing congestion in the coming years. The Department forecasts a 10% rise in traffic, resulting in an average 10 minute delay per month for drivers (17 minutes in urban areas), between now and 2035⁶². The three main drivers of this forecasted increase in traffic are increases in GDP, population growth and decreases in the real terms cost of driving. Together, these factors accounted for around 90% of the traffic growth in the National Road Traffic Projections, 2022.

It is also likely that drivers will have to deal with more roadworks in the future, as our aging road infrastructure will require increased spending on maintenance^{63,64}. Our road infrastructure faces growing challenges from an increasingly volatile climate, with more frequent and intense weather events accelerating deterioration and disrupting connectivity in areas with high traffic demand.

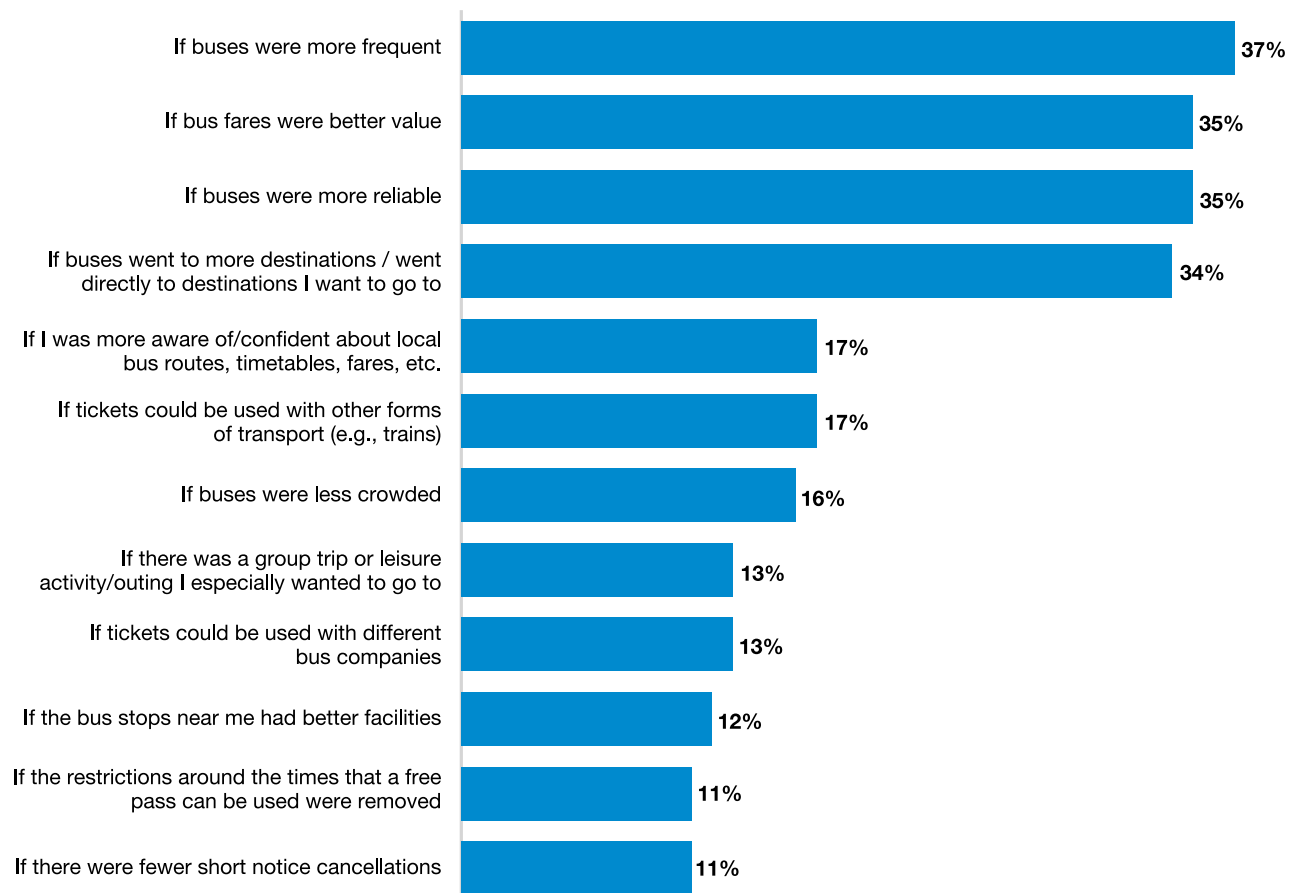
Transport Focus research⁶⁵ indicates that logistics and coach business are less satisfied than most road users with the Strategic Road Network and that their satisfaction has declined more steeply in recent years (overall satisfaction is now at 36%, down from 55% in 2020/21). Like other road users, journey speed and journey time reliability influence satisfaction scores. Businesses want faster completion of road works, better planning of road works and more information to help with their planning.

Buses

The top priorities to address amongst current bus users are to increase the frequency of buses and improve their reliability. Two surveys asking people what would encourage them to use buses suggest that increasing bus frequency is more important in encouraging use than increasing reliability^{66,67}, but in two other studies, reliability emerged as more important than service frequency⁶⁸. Transport Focus research exploring what influences bus user satisfaction reveals that journey reliability or punctuality is the biggest factor⁶⁹. The latest Transport Focus research on bus satisfaction found that most bus users in England were satisfied with their recent bus journey (83%), however, satisfaction with punctuality is slightly lower (75%)⁷⁰.

Research asking people about what would encourage them to use public transport and buses indicates that cheaper fares are also important^{71,72,73}, and the evaluation of the £2 bus fare cap found that the scheme did contribute to an approximate 5% increase in bus patronage⁷⁴. However, Transport Focus research with bus users indicates that fares are less important than several other service factors in driving satisfaction⁷⁵ and DfT research, from during the COVID-19 pandemic, indicated that cost was less important than many other factors including reliability of travel, ease of the journey (including connectivity to other public transport services) and overall journey time in influencing decisions to travel by bus⁷⁶.

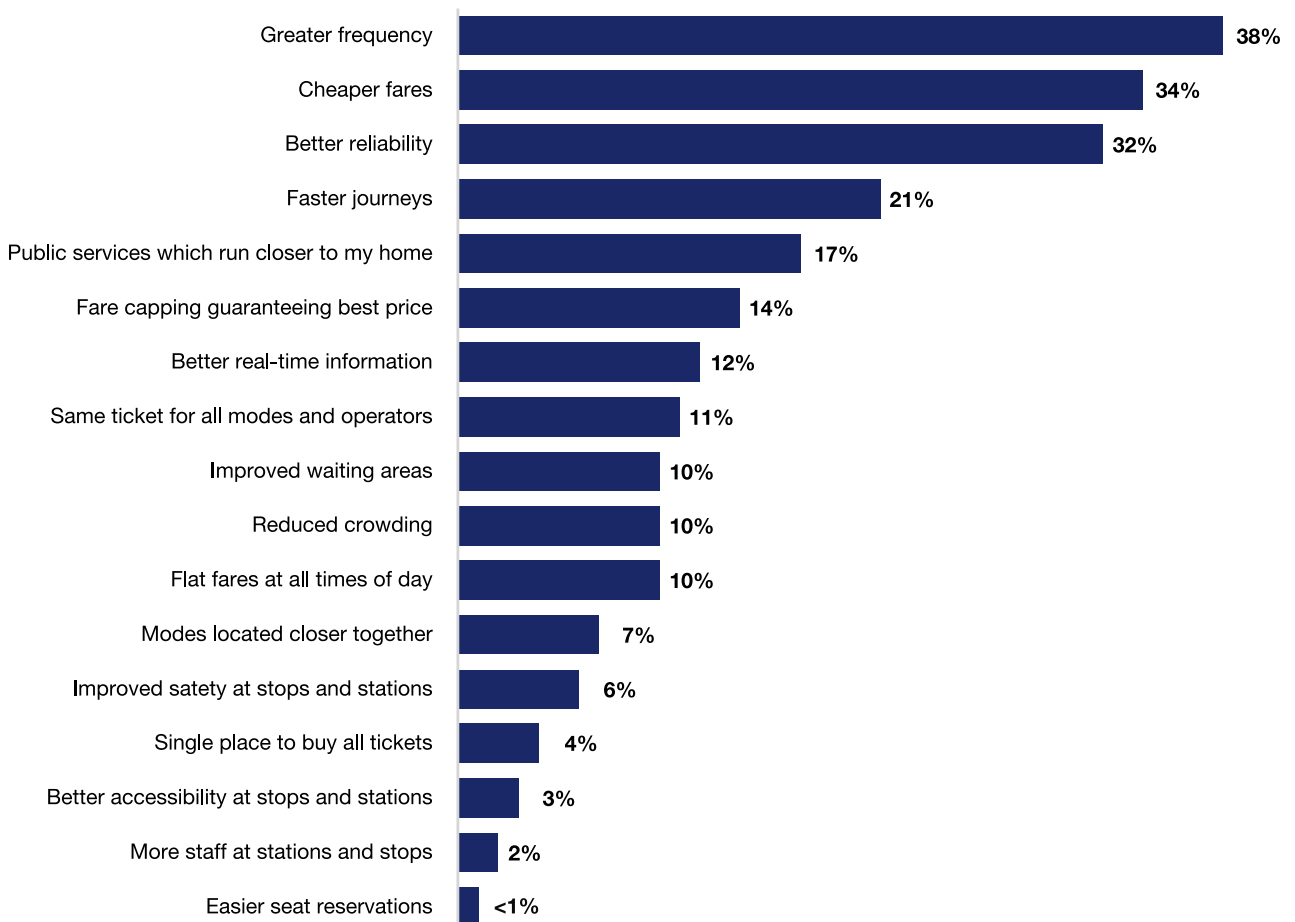
Figure 19: Top 12 measures that would encourage increased bus use, Transport Focus 2023



Source: Transport Focus, Motivations and barriers to bus usage, June 2023.
 Base: all those using buses less frequently than they did a year ago (Base n=341).

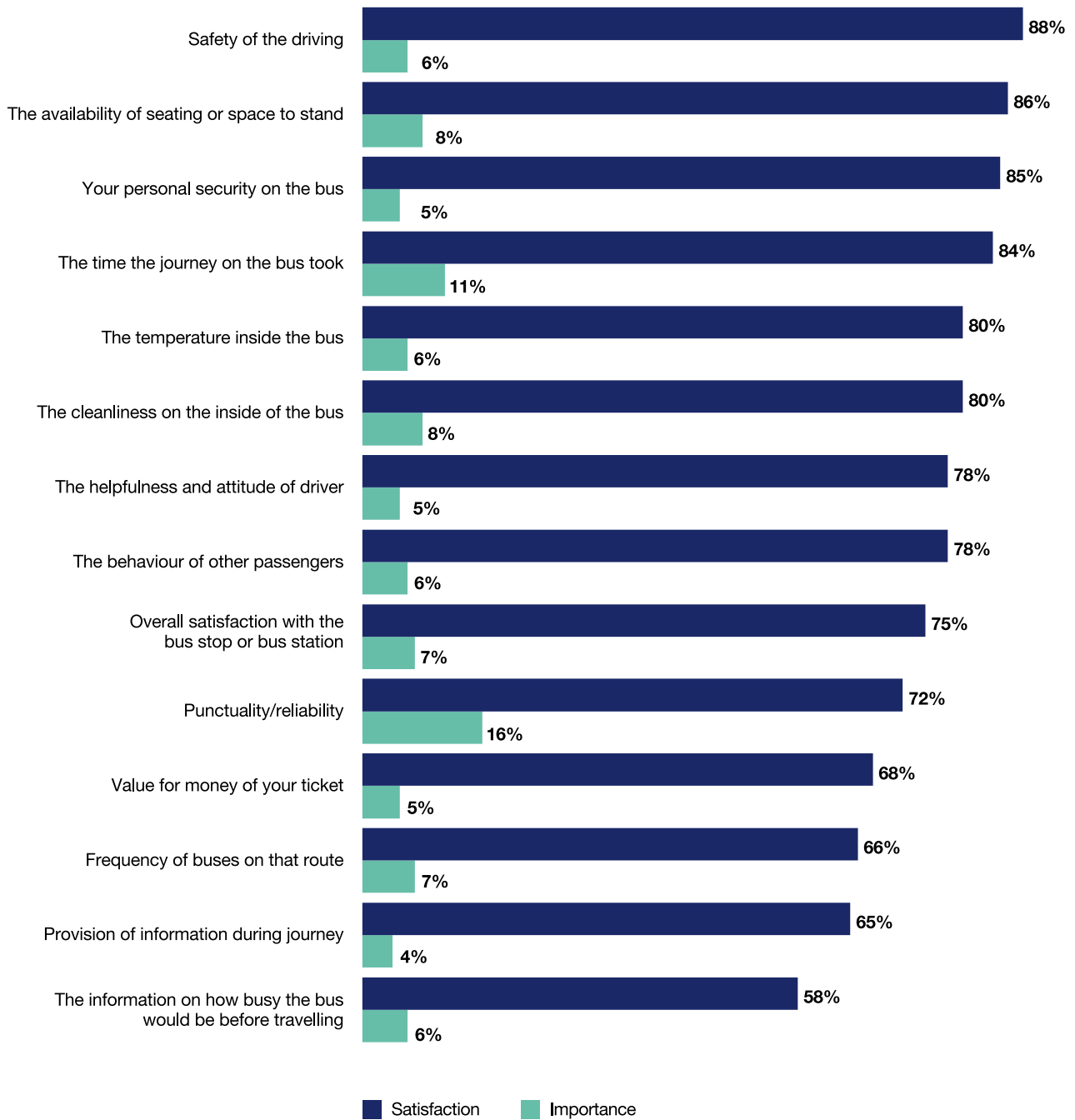


Figure 20: Top 5 Measures to encourage bus use, FUSION Study 2025



Source: FUSION study wave 5, fieldwork conducted between 10th and 24th March 2025 after the £3 bus fare cap was live. Which, if any, of the measures listed below would be most likely to encourage you to use buses for more of your journeys? Please select your top five measures. Base All respondents (n=3,613).

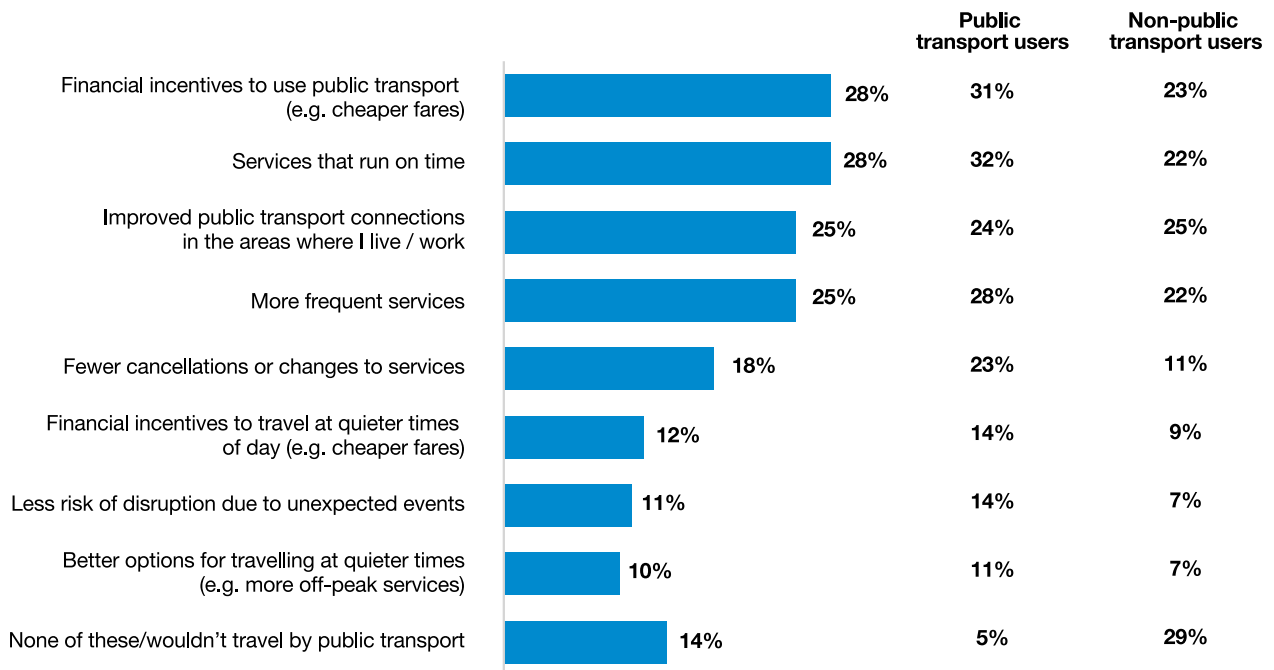
Figure 21: Importance and satisfaction with aspects of bus journey amongst users, Transport Focus 2023



Source: Transport Focus Bus Passenger Satisfaction - key driver analysis, published in February 2023 drawing from data collected between July 2022 and January 2023. Base (n=4,145). Importance shows how much each aspect influences overall satisfaction with the bus journey, based on Transport Focus’s key driver analysis rather than direct passenger ranking, whereas satisfaction is simply how happy passengers say they are with each aspect of their journey.



Figure 22: Things which would encourage people to consider travelling by public transport, adults aged 16 to 75 years old in England, November 2023



Source: Our Changing Travel 2023. 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) * Codes selected by less than 10% of respondents have been removed from this chart.

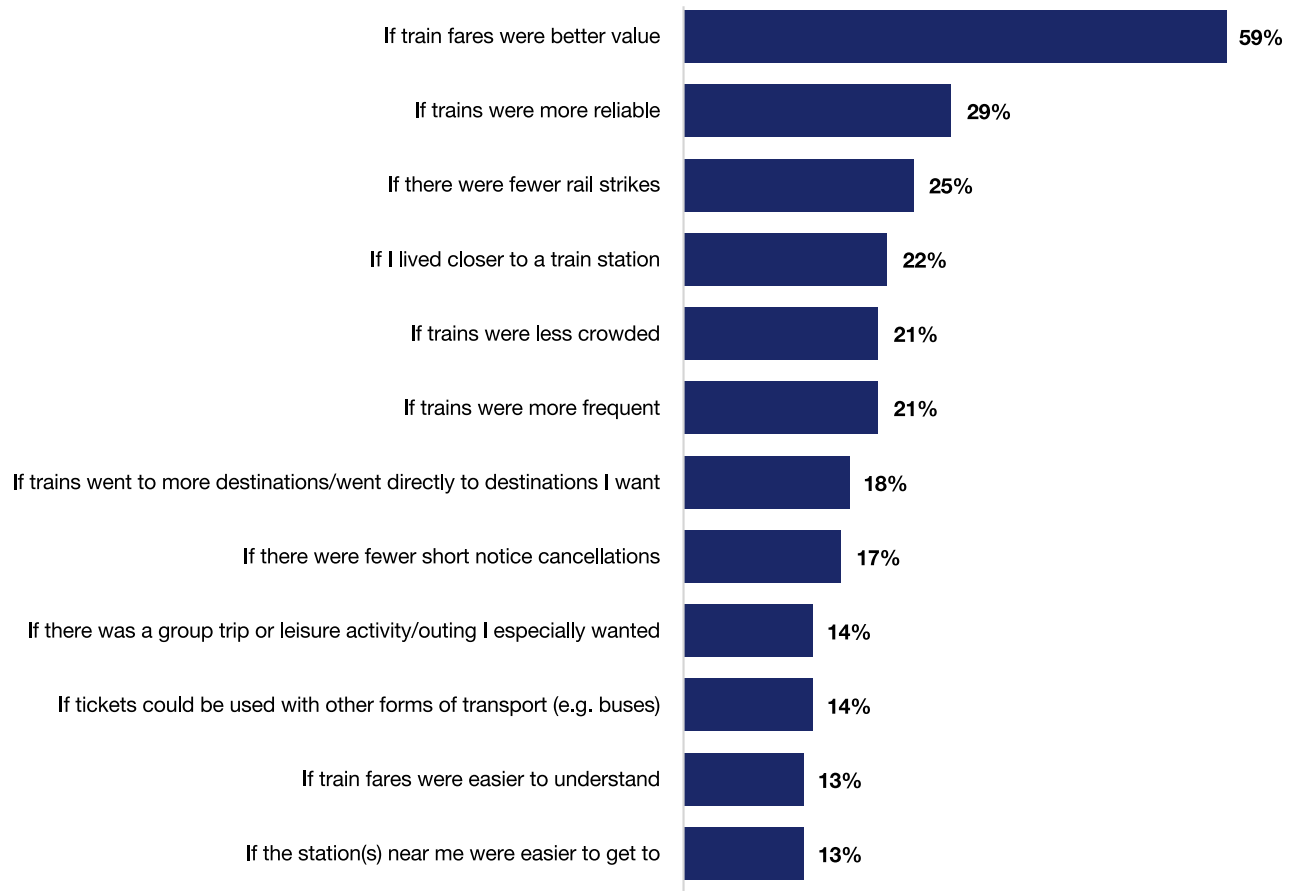
Trains

The cost of rail fares, which increased by 38% above inflation between 1995 and 2023⁷⁷, emerges as the top priority to increase both rail use and improve satisfaction amongst rail passengers.

Transport Focus research conducted in 2023 and the more recent DfT FUSION study asked people about what would encourage them to use trains. Better value fares were ranked clearly ahead of other factors in the Transport Focus study⁷⁸, while the FUSION study found that cheaper fares were selected above other factors⁷⁹.



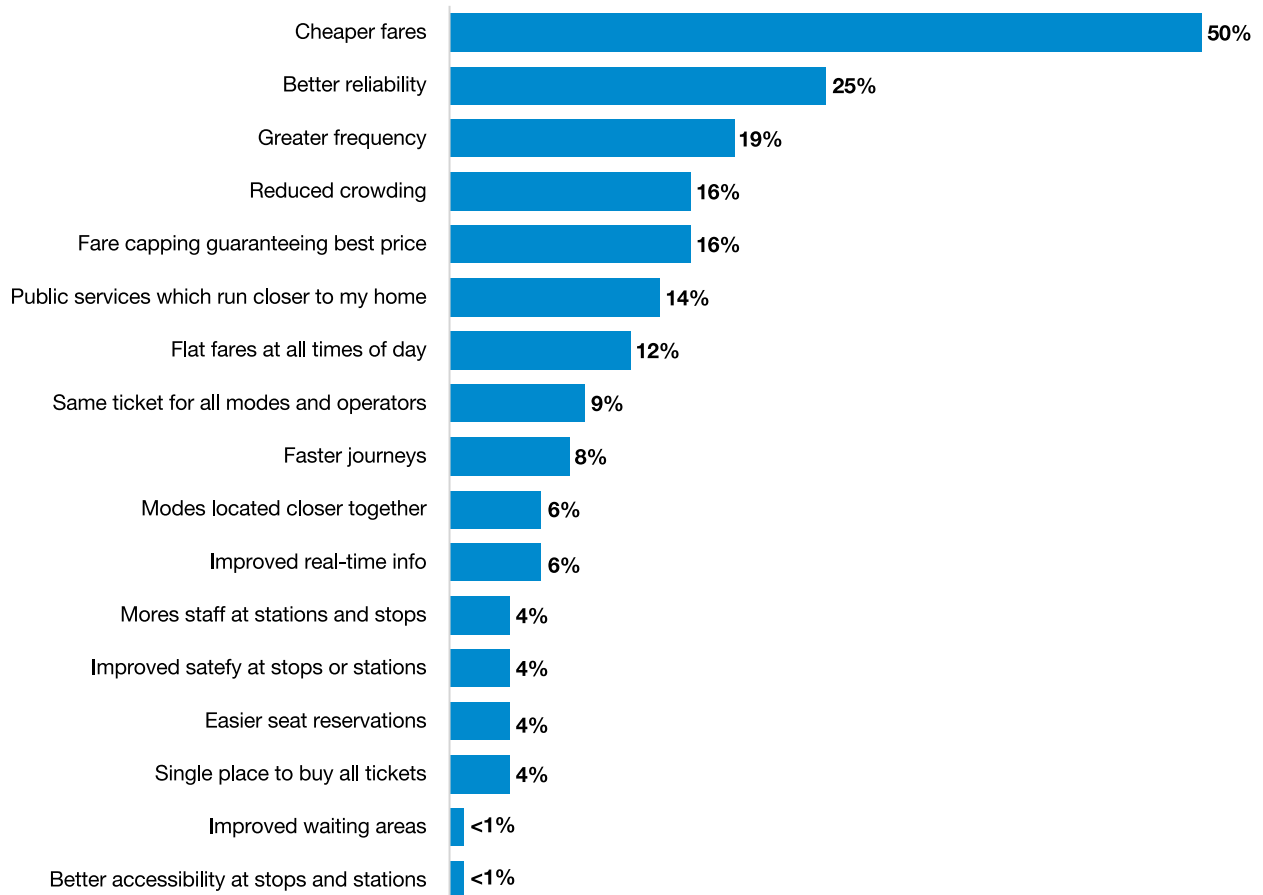
Figure 23: Top 12 measures that would encourage increased rail use, Transport Focus 2024



Source: Transport Focus—motivations and barriers to train use. Which five reasons would most encourage you to use trains more in the future? Base: all who would consider using trains more (n = 1,048).



Figure 24: Measures to encourage rail use, FUSION Study 2025

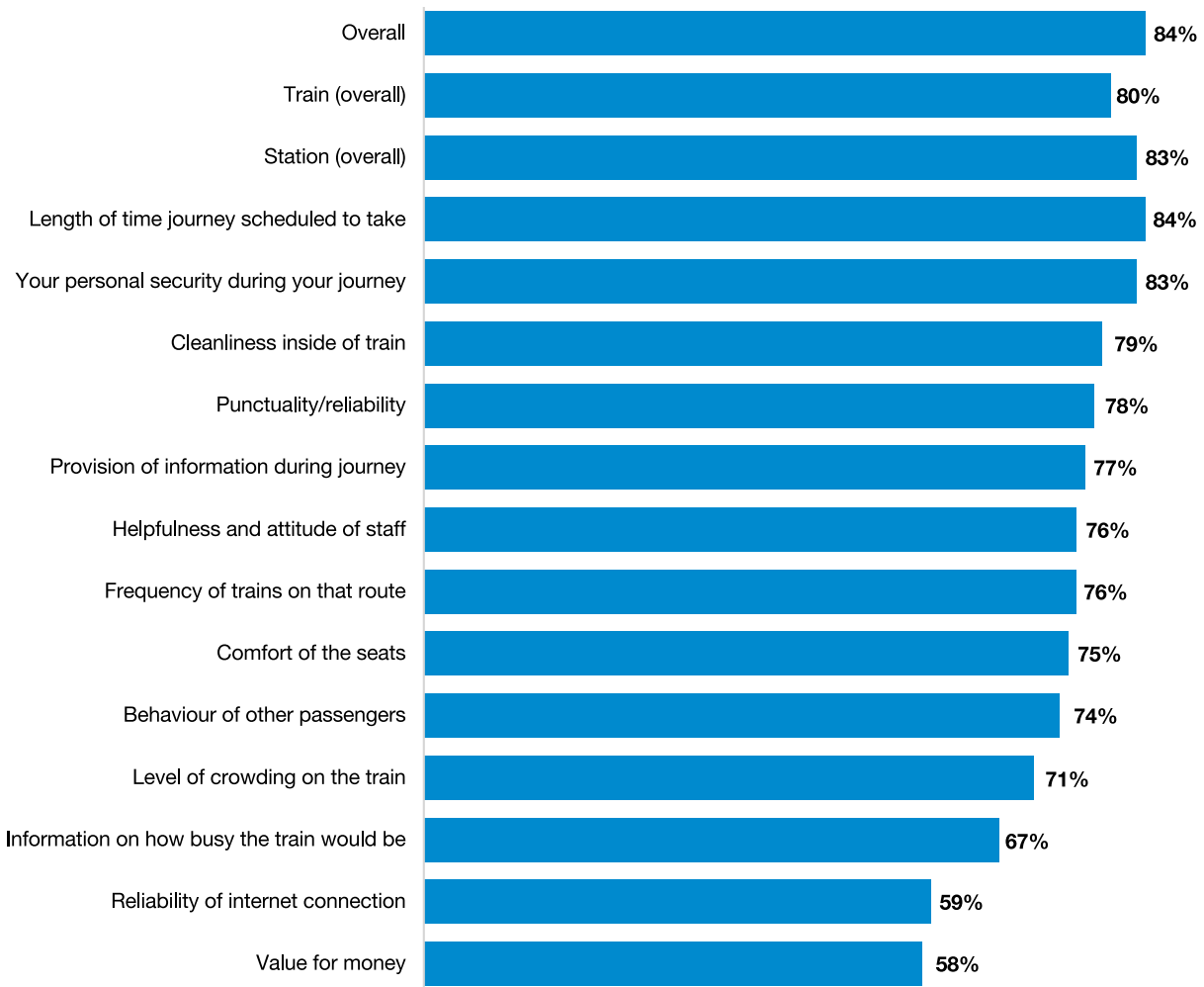


Source: FUSION study wave 5, fieldwork conducted between 10th and 24th March 2025. Which, if any, of the measures listed below would be most likely to encourage you to use trains for more of your journeys? Please select your top five measures. Base All respondents (n=3,613)

Transport Focus' regular Rail User Survey⁸⁰ asks passengers in Great Britain about how satisfied they were with their most recent train journey. Overall satisfaction levels are high, with an average of 84% of respondents reporting satisfaction across surveys conducted between May and July 2025. Since September 2024,

overall satisfaction has remained above 80%. However, satisfaction with 'value for money' has consistently been lower than for most other aspects asked about, except the reliability of internet connection, across the past year.

Figure 25: Satisfaction with various aspects of recent rail journey, July 2025



Source: Transport Focus Rail User Survey editions 31-42, current report data only (which combine values across the latest 4 surveys). Satisfaction questions are based on the most recent train journey made within seven days of being surveyed. Base sizes vary per aspect and reporting (min n=899, max n=1,319)

Walking and wheeling

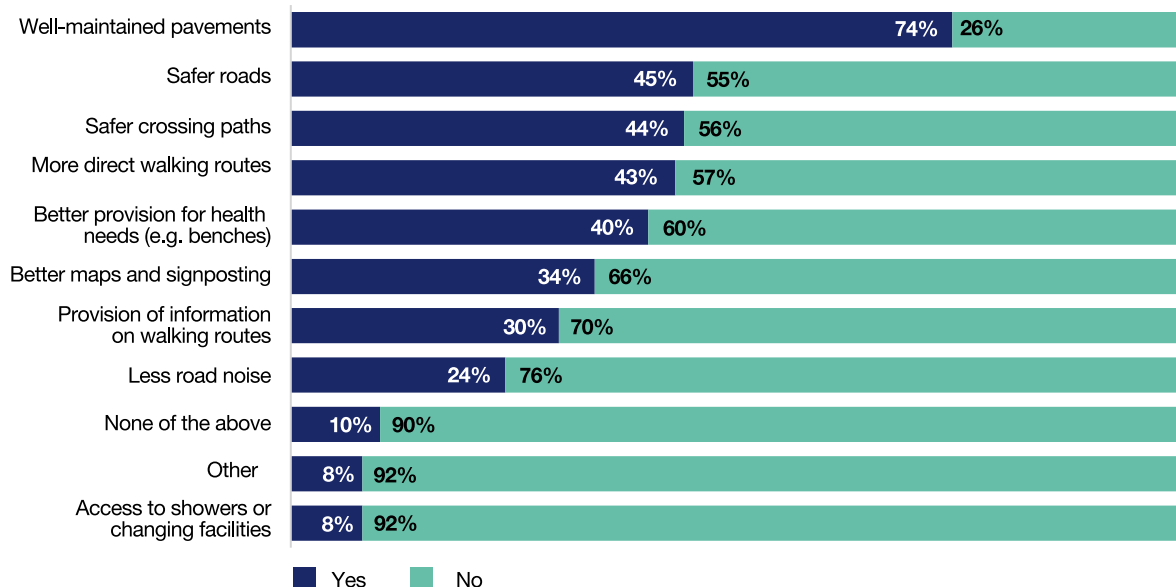
While most very short trips of up to a mile are walked (81% in 2024), only 36% of trips of slightly longer than this (1-2 miles) are walked⁸¹, reflecting that destinations need to be near enough to encourage people to consider walking. Active Travel England (ATE) research highlights that greater travel distance is a key barrier to walking and wheeling and is one of the reasons why secondary school children, who often have further to travel to school, are less likely to walk to school than those in primary school⁸². This is reflected in the NTS. Every other year, school-age participants are asked what prevents them from walking to school more and the top selected answer in 2023 was it being too far (39%), followed by taking too long (15%)⁸³.

Though the NTS reveals that most people are satisfied with the provision for walking (74% indicated they were satisfied in 2024, which is higher than provision for all other modes⁸⁴), ATE research highlights road safety concerns and pavement disruptions are barriers to walking and wheeling⁸⁵. This is echoed in a DfT survey where well-maintained pavements, safer roads and more crossing points were the top factors

selected when respondents were asked what would encourage them to walk or wheel more⁸⁶. These safety concerns reflect the fact that pedestrians are at greater risk on our roads compared to car occupants (27 fatalities per billion passenger miles compared to 2 fatalities for car occupants), with pedestrians accounting for a quarter of all road fatalities in 2023⁸⁷.

When asked what the main reasons are for not walking more in their local area, the most common answers given were, walking enough already (30%), the weather (12%), having no interest in walking (11%) and ill health or being too old (10%). Walking taking too long (7%), distances being ‘too far’ (4%) and personal security concerns are more frequently mentioned than safety concerns (2%)⁸⁸. However, when asked about what would encourage them to walk more in their local area and, for school-age children, what would encourage them to walk to school, safer roads was the most selected answer (mentioned by 20%) after nothing (50% for walking overall, 54% for walking to school)⁸⁹.

Figure 26: Percentage of people selecting factors that would encourage them to walk more



Source: National Travel Attitudes Survey (NTAS) Wave 5.

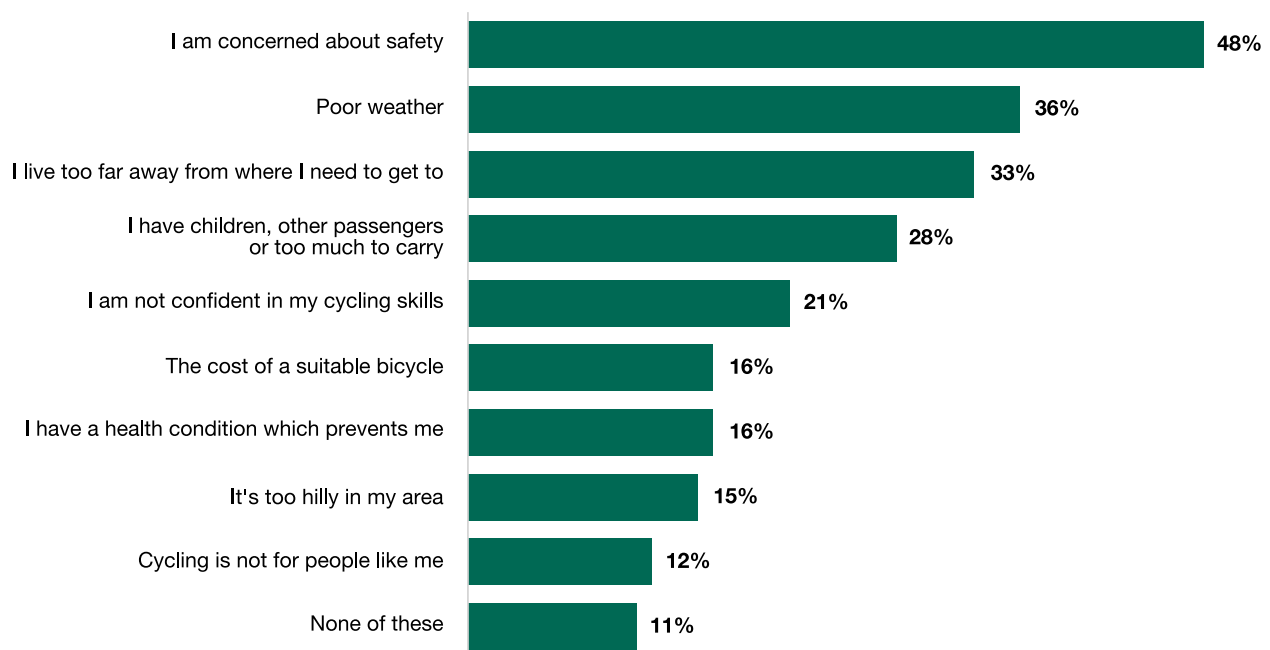
Cycling

Most evidence indicates that safety is by far the key issue to address regarding cycling. In a DfT survey of people aged 16 and over conducted between August and September 2023, safety concerns emerged as the top reason given for not cycling or not cycling more often (mentioned by 48%). Women, who are less likely to cycle than men, were more likely to flag safety concerns (51% vs 45% of men) and more likely to report having no confidence in their cycling skills (29% vs 12%). Those from ethnic minorities were more likely to report safety concerns and poor weather as a barrier, whereas older people were more likely to say that they had a health condition⁹⁰. As with walking and wheeling, these concerns reflect what is evident in road safety statistics, which show that, like pedestrians, cyclists are at greater risk on our roads than car occupants (24 fatalities per billion passenger miles compared to 2 fatalities for car occupants), with cyclists accounting for 5% of all road fatalities in 2023⁹¹.

The same DfT survey conducted between August and September 2023 indicates that addressing safety concerns is the priority to encourage people to cycle or cycle more. The top factors selected by respondents when asked what would encourage them to cycle or cycle more were safer roads (61%) and off-road or segregated cycle paths (52%)⁹². Unfortunately, NTS statistics indicate that the availability of high-quality cycle infrastructure is limited for many as satisfaction with cycling provision is low compared to other modes⁹³.

NTS data provides a slightly different perspective on barriers to cycling. It suggests that addressing safety concerns and improving cycling infrastructure may not be enough to encourage more people to cycle. When asked why they don't cycle, 26% said they had 'no interest in cycling' and 12% mentioned safety concerns. Similarly, 46% said that nothing would encourage them to cycle more. These responses indicate that many people simply do not want to cycle and that interventions, such as improving safety, would not change this.

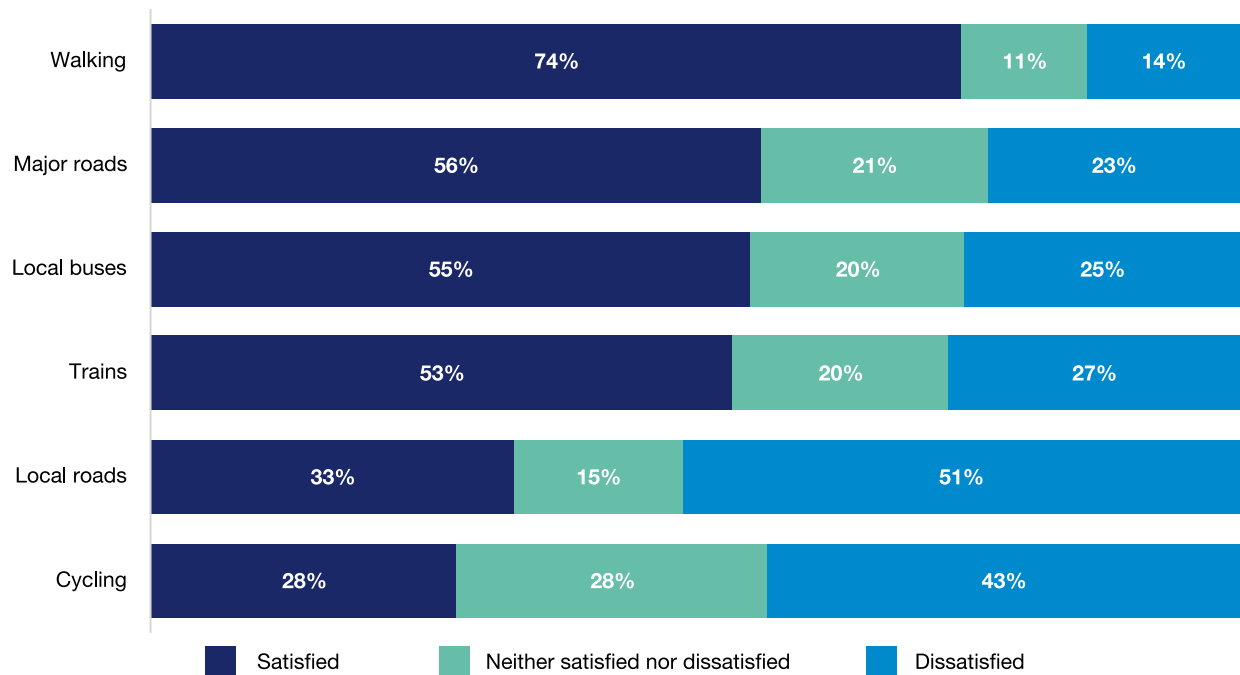
Figure 27: Reasons why people do not cycle, or chose not to cycle more



Source: National Travel Attitudes Survey, Wave 9. Base n=2,011.



Figure 28: Satisfaction with overall provision across modes



Source: NTS0802.



Multimodal travel

As also highlighted previously, multimodal travel is relatively uncommon. Qualitative research exploring barriers and enablers⁹⁴ of journeys involving multiple modes or multiple stages within the same mode (e.g. changing buses) indicates that the most common barriers preventing people from making these journeys reflect the wider challenges people face when using buses and trains:

- infrequent services (which increases the risk of long waiting times at interchanges)
- lack of availability of different services (which reduces the options available and makes disruption more problematic)
- unreliable services (which leads to stressful and frustrating experiences likely including missed connections, increased journey costs and late arrival)
- affordability of journey options (this is a greater concern amongst lower socio-economic groups)

The research⁹⁵ found that having access to information—both in advance to enable planning, and during the journey to help navigate disruption or interchanges—along with good interchange facilities can help overcome these barriers and enable people to make multimodal or multistage journeys.

More recent qualitative research commissioned by DfT⁹⁶ to understand factors influencing mode choice, barriers and enablers of multimodal travel on public transport, and views towards factors and operational changes that could increase take-up and improve experiences of multimodal public transport, found that convenience and cost were the most top-of-mind factors when choosing transport modes. So the more convenient and cost-effective multimodal public transport is, the more likely it will be considered a viable choice and opted for over driving.

Participants defined convenience as minimising time, effort (i.e. the mental and physical energy required to make a journey) and stress (i.e. negative feelings that could be experienced when making a journey where too much effort is required or where things go wrong). Therefore, to increase convenience, operational changes should aim to reduce the time, effort and stress of multimodal public transport for passengers.

Improved information provision and more frequent services were seen as changes that could help increase convenience and therefore participants felt they could increase the use of multimodal public transport. Changes that would reduce the cost of fares were also seen as important to increase the consideration of multimodal public transport as an alternative to car travel⁹⁷.

The effort of buying multiple tickets was not spontaneously reported as a barrier to multimodal public transport use, and therefore integrated ticketing was viewed as less important than other changes to encourage greater use of multimodal public transport, unless it also reduced ticket costs⁹⁸.

5 Transport, people and growth: unlocking opportunity across England

Key points

Evidence demonstrates the importance of good transport to increase connectivity between people and businesses and catalyse economic growth. A secure, reliable, well-connected and integrated transport network enables growth and brings communities closer to vital services, jobs and educational opportunities.

In the long-term, transport infrastructure investment can help places grow, as recognised in the Industrial Strategy, with a commitment to strengthen connections between and within city regions and clusters, and boost productivity.

Evidence sources in this section

The evidence in this section draws from a range of academic studies, to show the connection between a good transport network and economic growth, which is the number one priority of this Government.

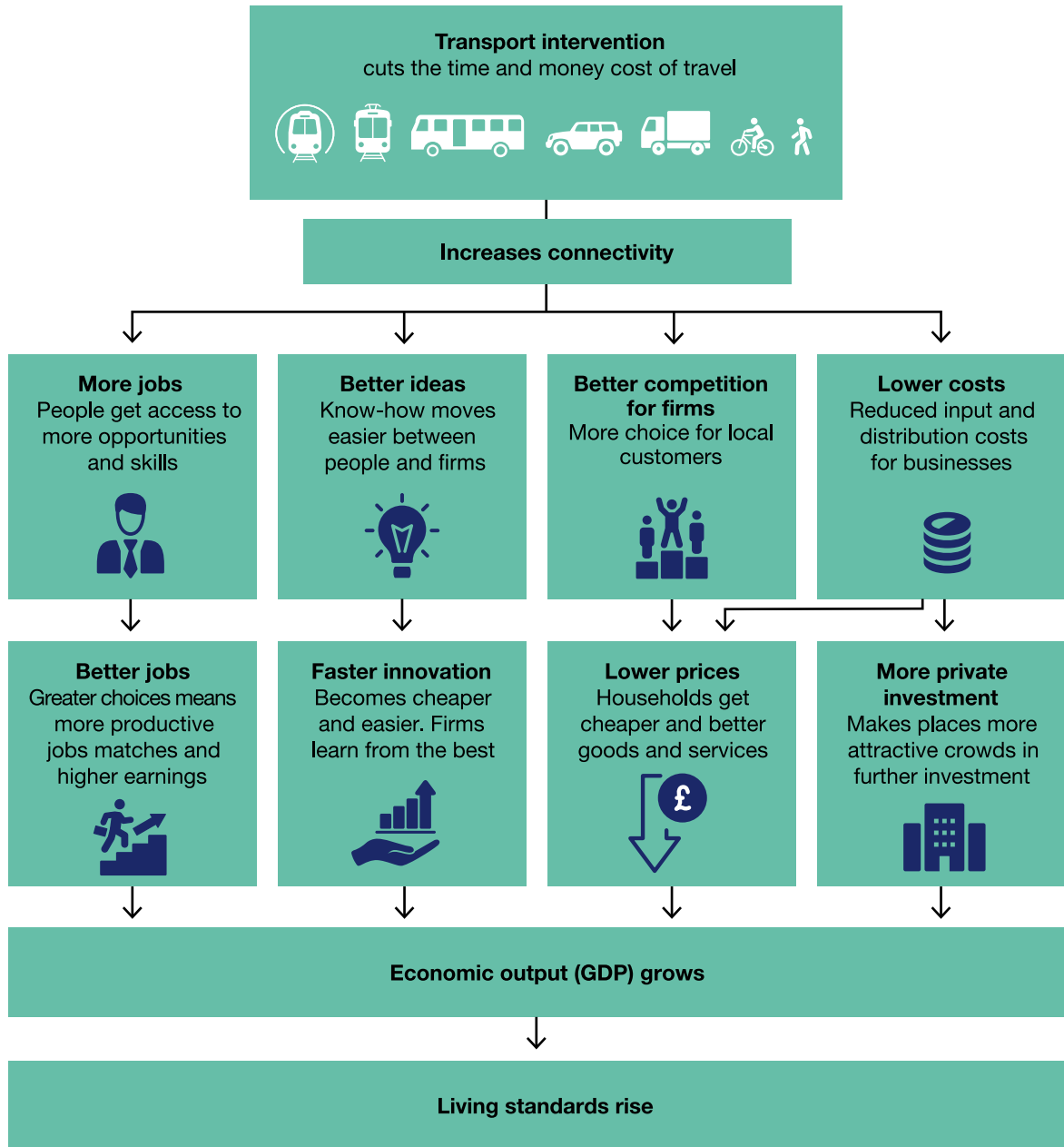
The relationship between transport and growth

Academic evidence highlights the importance of transport in driving economic growth. A study commissioned by the Department, published in 2014, found that if all other drivers of growth were to increase by 10% and transport infrastructure remained constant, then realised income growth would be just 9%⁹⁹. Other academic research found that a 10% increase in the stock of transport infrastructure (of at least £50-90bn investment) could increase GDP by around 0.6%¹⁰⁰.

As shown in Figure 29, there are different channels through which transport filters to deliver growth. By increasing connectivity, we can access more jobs, generate better ideas, improve competition and lower costs.

In addition, transport has a role in improving health outcomes. Increasing activity through walking and cycling, even as part of public transport usage, contributes to a reduced risk of heart disease, diabetes, and obesity. These intrinsic benefits of transport play a role in contributing to economic growth¹⁰¹. Like transport, health is both a driver and beneficiary of economic growth, increasing both labour supply and productivity^{102,103}.

Figure 29: Illustration of the economic impact of increased connectivity



These impacts will take time to materialise - while there's an initial small impact on demand, the biggest supply-side impacts (e.g. new access to jobs/lower costs) occur in the longer-term

More and better jobs

In 2018, one in five unemployed people in England either turned down a job or decided not to apply for a job due to transport-related issues¹⁰⁴. This makes it vital for people to be able to access the jobs and opportunities they need—connectivity enables people to access more opportunities and skills, improving employment outcomes.

Locating housing and development in well-connected, accessible areas could generate up to 50% more positive economic impact in terms of employment and productivity compared to areas with less connectivity¹⁰⁵. An area with poor connectivity is one where people struggle to access places like work, school, shops, or healthcare easily or quickly using available transport.

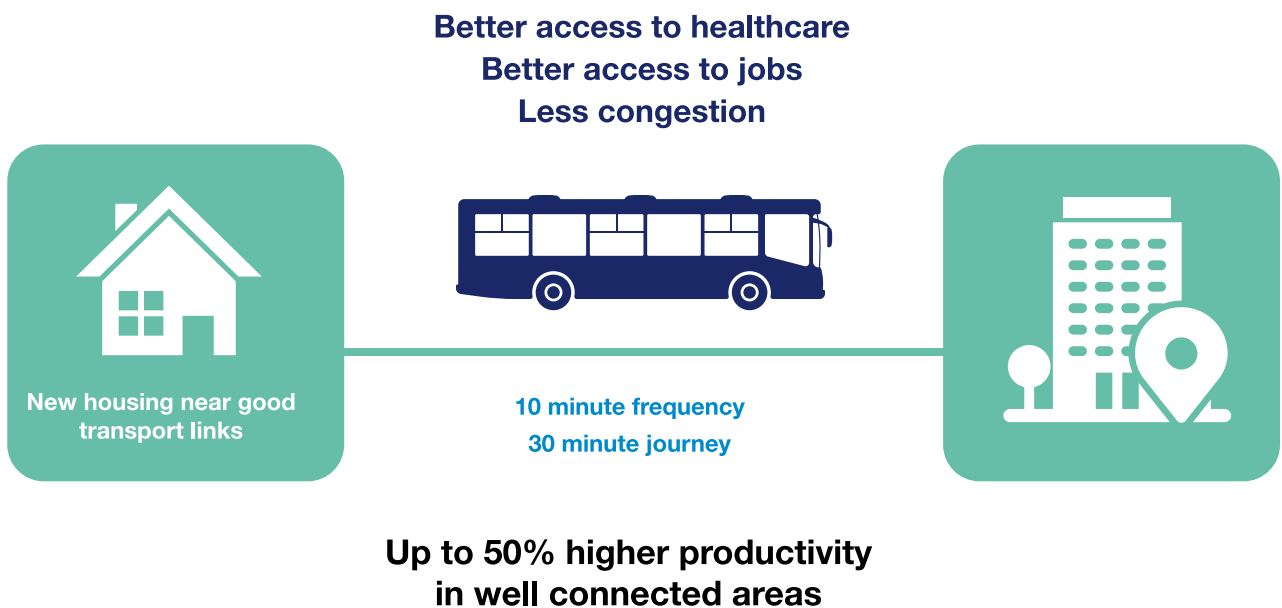
Firms grow faster when they're close together, and better-connected places create better jobs. Places near big cities grow faster—if you cut travel time to a large city in half, the OECD estimates that people in nearby areas earn more, and the local economy grows quicker, by about 0.2 to 0.4% more each year¹⁰⁶.

Figure 30: Transport challenges impact on job opportunities



turned down a job or decided not to apply for a job, due to transport related problems

Figure 31: Illustration of how connectivity improves links to jobs and services



Note: Example for illustration only; research on connectivity and productivity does not assume the specific mode, service frequency or journey time shown.

Better ideas

When businesses cluster in the same area, especially in high-tech or manufacturing sectors, they benefit from sharing ideas as well as skilled workers and suppliers. In better-connected areas, companies are more likely to innovate because they are exposed to new technologies, research and business practices from nearby firms and universities. This also makes the UK more competitive globally. Extensive academic research confirms that increasing connectivity and the 'clustering' of businesses boosts UK regional productivity, as it has for the Cambridge-Oxford corridor¹⁰⁷. This is called agglomeration.

Better competition for firms

Transport and infrastructure also help firms reach more customers easily. Better transport infrastructure and well-managed public transport (like bus franchising, rail coordination through Great British Railways) can improve connectivity, which increases choice and competition for local customers. Stiff competition strengthens markets by increasing the number of shops or suppliers a household or business can choose from. This wider choice intensifies pressure on businesses to lower costs, improve quality, and deliver better services. When firms compete, they are incentivised to become more efficient and respond more effectively to customer needs.

Over time, this leads to better products, fairer prices and stronger productivity—benefiting both consumers and the wider economy.

Lower costs

Reduced input and distribution costs for businesses result from better connectivity. Input costs include acquiring raw materials and components, or parts used in manufacturing, as well as labour costs and services. Reduced distribution costs help businesses trade more efficiently. Both lead to higher profits and lower prices.

In 2023, 207 billion tonne-kilometres of domestic freight were moved in the UK, with 81% by road¹⁰⁸, highlighting the importance of efficient logistics. The maritime and aviation sectors are vital to businesses for transporting goods in and out of the country.

6 Annex A: Summary of NTS trip chain analysis and FUSION data collection on multistage/multipurpose journeys

Aspect	NTS Trip Chain Analysis	FUSION Survey Approach
Source	Travel diaries with individual trips recorded daily.	The survey designed for Better Connected asked about a recent complex journey with multiple stops and/or purposes.
Method	Trip chains are reconstructed using trip details (purpose, mode, time, destination).	Respondents describe a multistop journey directly based on a brief explanation of a trip chain, with an example provided.
Interview Design	Face-to-face interviews followed by a 7-day diary.	Mobile app with short definition prompt.
Recall Timing	Daily recording reduces recall bias.	Recall may span up to 4 weeks, introducing variability in accuracy.
Trip Chain Definition	Requires multiple purposes, aligning with transport research definitions.	May include single-purpose, multistop trips.
Strengths	Consistent with transport research; representative.	Captures lived experience of journey complexity.
Limitations	Reconstruction needed; excludes very short trips.	Recall bias; may favour memorable journeys. People are more likely to remember unusual, or significant journeys rather than those that are routine or every day.
Notable Insight	Enables trend analysis and an understanding of frequency.	Reveals public unfamiliarity with the trip chain concept but provides insights into what motivates travel choices. Broadly confirms the NTS findings.
Sample size	16,980 individuals fully participated in 2024—with 31,680 addresses sampled across England. All ages.	3,500 individuals aged 16 and over across England.
Coverage Bias	Low. Statistical weighting, imputation and sampling design is used to produce a highly representative national sample. The NTS meets the highest standards of Official National Statistics.	Low-Medium. Responses analysed 'as is' from respondents. Matching to DfT Transport User Personas shows Less mobile car reliant and Older, less affluent participants are under-represented in FUSION data while Comfortable Empty Nesters are over-represented.
Short Trips	Excludes trips under 50 yards; short walks only recorded on Day 7.	May include short trips if perceived as part of a complex journey.

7 Endnotes

- 1 The National Travel Survey (NTS) is a household survey designed to monitor long-term trends in personal travel and to inform policy development. It is the primary source of data on personal travel patterns by residents of England within Great Britain. The survey collects information on how, why, when and where people travel, as well as factors affecting travel (for example, car availability and driving licence holding). Note: For ease of reading, we use the terms women and men throughout this document. However, this terminology is different to how the information is recorded in the NTS, which refers to females and males of all ages, including children. In the 2024 survey, those aged 0–16 made up about 18% of the unweighted sample. Therefore, where age is not stated, results given for the category of “women of all ages” will reflect travel patterns for younger age groups as well as adults. DfT (2024) National Travel Survey Technical Report. Available at <https://www.gov.uk/government/statistics/national-travel-survey-2024-technical-report>
- 2 Geographic Data Service (2025) *FUSION Travel Survey and Movement Data*. Available at <https://data.geods.ac.uk/dataset/fusion-travel-survey-and-movement-data>
- 3 DfT (2025) *NTS 2024: TSGB01 Passenger transport by mode, annual from 1952*. Available at <https://www.gov.uk/government/statistical-data-sets/tsgb01-modal-comparisons>
- 4 DfT (2025) *NTS 2024: NTS0403 Average number of trips, miles and time spent travelling by trip purpose*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts04-purpose-of-trips>
- 5 DfT (2025) *NTS 2024: NTS0308 Average number of trips and average distance travelled by trip length and mode: England, 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons>
- 6 DfT (2025) *NTS 2024: NTS0303a Average number of trips, stages, miles and time spent travelling by mode: England, 2002 onwards*. Available at <https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons>
- 7 DfT (2026) *Domestic Transport Usage by Mode*. Available at: <https://www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic/domestic-transport-usage-by-mode>. Note that tube use was very low on 11 September 2025 due to a London Underground and Docklands Light Railway (DLR) strike. The weekday average figures quoted in this report refer to Monday to Friday only, rather than weekends which have seen greater recovery due to increased leisure travel.
- 8 DfT (2025) *NTS 2024: Household car availability and trends in car trips*. Available at: <https://www.gov.uk/government/statistics/national-travel-survey-2024/nts-2024-household-car-availability-and-trends-in-car-trips>
- 9 DfT (2025) *Annual bus statistics: year ending March 2024*. Available at: <https://www.gov.uk/government/statistics/annual-bus-statistics-year-ending-march-2024/annual-bus-statistics-year-ending-march-2024>
- 10 DfT (2025) *Rail factsheet: 2024*. Available at: <https://www.gov.uk/government/statistics/rail-factsheet-2024/rail-factsheet-2024>
- 11 DfT (2025) *NTS 2024: NTS9902A Household car or van availability by region of residence: England, 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts99-travel-by-region-and-area-type-of-residence>
- 12 DfT (2025) *Annual bus statistics: year ending March 2024*. Available at: <https://www.gov.uk/government/statistics/annual-bus-statistics-year-ending-march-2024/annual-bus-statistics-year-ending-march-2024>
- 13 DfT (2025) *NTS 2024: NTS9903 Average number of trips by main mode, region, rural-urban classification of residence: England 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons>
- 14 Gunnhild Beate Antonsen Svaboe, Trude Tørset & Jardar Lohne (2024) *A comparative study of national travel surveys in six European countries*. Available at: <https://www.tandfonline.com/doi/pdf/10.1080/03081060.2024.2311081>
- 15 DfT (2025) *NTS 2024: TSGB01 Passenger transport by mode, annual from 1952*. Available at <https://www.gov.uk/government/statistical-data-sets/tsgb01-modal-comparisons>
- 16 Eurostat (2025) *Modal split of air, sea and inland passenger transport*. Available at: https://doi.org/10.2908/TRAN_HV_MS_PSMOD
- 17 Office for National Statistics (ONS) (2025) *Population estimates for the UK, England, Wales, Scotland and Northern Ireland: mid 2024*. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/annualmidyearpopulationestimates/mid2024>
- 18 DfT (2025) *Aviation Statistics AVI0201 Air traffic at UK airports: 1950 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/aviation-statistics-data-tables-avi>
- 19 Civil Aviation Authority (2025). *UK airport data July 2025: Table 10 2 Domestic Terminal Passenger Traffic*. Available at: <https://www.caa.co.uk/data-and-analysis/uk-aviation-market/airports/uk-airport-data/uk-airport-data-2025/july-2025/>
- 20 Statistics Netherlands. *Dutch National Travel Survey*. Available at: <https://www.cbs.nl/en-gb/our-services/methods/surveys/brief-survey-description/dutch-national-travel-survey>

- 21 Federal Ministry for Transport (Germany) (2025) *Mobility in Germany*. Available at: <https://www.bmv.de/SharedDocs/DE/Artikel/G/mobilitaet-in-deutschland.html>
- 22 DfT (2025) NTS 2024: NTS0601 *Average number of trips, stages and distance travelled by sex, age and mode: England, 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons>
- 23 Schwanen, T. (2022). *Inequalities in Everyday Urban Mobility*. GOLD VI Working Paper 09. Available at: <https://www.urban-know.com/gold-vi>
- 24 ONS (2024). *Principal projection – UK population in age groups*. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/datasets/tablea21principalprojectionukpopulationinagegroups>
- 25 Department for Work and Pensions (2025). *Family Resources Survey: financial year 2022 to 2023*. Available at: <https://www.gov.uk/government/statistics/family-resources-survey-financial-year-2022-to-2023/>
- 26 DfT (2025). *Disability, accessibility and blue badge scheme statistics: 2023 to 2024*. Available at: <https://www.gov.uk/government/statistics/disability-accessibility-and-blue-badge-scheme-statistics-2023-to-2024>
- 27 DfT (2025). NTS 2024: DIS0402 *Average number of trips and distance travelled by mode with disability status and age: England*. Available at: <https://www.gov.uk/government/statistical-data-sets/transport-disability-and-accessibility-data-tables-dis04>
- 28 DfT (2025). NTS 2024: DIS0403 *Travel by purpose, with disability status and age: England*. Available at: <https://www.gov.uk/government/statistical-data-sets/transport-disability-and-accessibility-data-tables-dis04>
- 29 DfT (2025) NTS 2024: NTS0601 *Average number of trips, stages and distance travelled by sex, age and purpose: England, 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts04-purpose-of-trips>
- 30 Ng, W-S. & Acker, A. (2018) *Understanding Urban Travel Behaviour by Gender for Efficient and Equitable Transport Policies*. Available at: <https://www.itf-oecd.org/understanding-urban-travel-behaviour-gender-efficient-and-equitable-transport-policies>
- 31 DfT (2025) NTS 2024: NTS0601 *Average number of trips, stages and distance travelled by sex, age and purpose: England, 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts04-purpose-of-trips>
- 32 ONS (2026). *EMP01 SA: Full-time, part-time and temporary workers (seasonally adjusted)*. Available at: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/fulltimeparttimeandtemporaryworkersseasonallyadjustedemp01sa>
- 33 DfT (2025) NTS 2024: NTS0611 *Average number of trips and distance travelled by sex, age, mode and purpose or main mode, 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts04-purpose-of-trips>
- 34 DfT (2025) NTS 2024: *Travel to and from school*. Available at: <https://www.gov.uk/government/statistics/national-travel-survey-2024/nts-2024-travel-to-and-from-school>
- 35 DfT (2025) NTS 2024: NTS0705 *Average number of trips and miles by household income quintile and mode: England, 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons>
- 36 DfT (2025) *National Travel Survey 2023: Car availability and trends in car trips*. Available at: <https://www.gov.uk/government/statistics/national-travel-survey-2023/nts-2023-car-availability-and-trends-in-car-trips>
- 37 DfT (2025) NTS 2024: NTS0705 *Average number of trips and miles by household income quintile and mode: England, 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons>
- 38 ONS (2026). *RPI All Items Index: Jan 1987=100*. Available at: <https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/chaw/mm23>
- 39 ONS (2026). *Family spending workbook 1: detailed expenditure and trends*. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/personalandhouseholdfinances/expenditure/datasets/familyspendingworkbook1detailedexpenditureandtrends>. Disposable equivalised income has been used to provide a fairer measure of household resources by accounting for household size, enabling more accurate assessment of expenditure burden.
- 40 DfT (2025) NTS 2024: NTSQ08005: *Number of flights abroad in the last 12 months by household income quintiles: England, 2006 to 2023*. Available at: <https://www.gov.uk/government/statistical-data-sets/ad-hoc-national-travel-survey-analysis>
- 41 Primerano, F., Taylor, M.A.P., Pitaksringkarn, L. et al. (2008) *Defining and understanding trip chaining behaviour*. Available at: <https://doi.org/10.1007/s11116-007-9134-8>
- 42 DfT (2025). *FUSION project: multimodal transport user data*. Available at: <https://www.gov.uk/government/publications/fusion-project-multimodal-transport-user-data>
- 43 DfT (2025) NTS 2024: NTS0403: *Average number of trips, miles and time spent travelling by trip purpose: England, 1995 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts04-purpose-of-trips>
- 44 Center for Transportation Analysis (1999). *Examining trip-chaining behavior: a comparison of travel by men and women*. Available at: <https://rosap.ntl.bts.gov/view/dot/14128>
- 45 DfT (2024). *Car ownership: qualitative research*. Available at: <https://www.gov.uk/government/publications/understanding-car-ownership>

- 46 International Transport Forum (2018). *Understanding Urban Travel Behaviour by Gender for Efficient and Equitable Transport Policies*. Available at: <https://www.itf-oecd.org/understanding-urban-travel-behaviour-gender-efficient-and-equitable-transport-policies>
- 47 DfT (2023). *National Travel Attitudes Study: Wave 8*. Available at: <https://www.gov.uk/government/statistics/national-travel-attitudes-study-wave-8>
- 48 DfT (2026) *Personal Safety on Public Transport*. Available at: <https://www.gov.uk/government/publications/personal-safety-on-transport>
- 49 DfT (2025) *Inclusive Transport Strategy evaluation: understanding confidence to travel among disabled and non-disabled people*. Available at: <https://www.gov.uk/government/publications/inclusive-transport-strategy-evaluation>
- 50 DfT (2024) *Disability, accessibility and blue badge statistics: 2022 to 2023*. Available at: <https://www.gov.uk/government/statistics/disability-accessibility-and-blue-badge-statistics-2022-to-2023>
- 51 DfT (2024) *Perceptions of personal safety on public transport*. Available at: <https://www.gov.uk/government/publications/perceptions-of-personal-safety-on-public-transport>
- 52 DfT (2024) *Perceptions of personal safety on public transport*. Available at: <https://www.gov.uk/government/publications/perceptions-of-personal-safety-on-public-transport>
- 53 DfT (2025) *Disability, accessibility and blue badge statistics, England, 2023 to 2024*. Available at: <https://www.gov.uk/government/statistics/disability-accessibility-and-blue-badge-scheme-statistics-2023-to-2024/disability-accessibility-and-blue-badge-statistics-england-2023-to-2024#accessibility-and-public-satisfaction-of-local-transport>
- 54 Transport Committee (2025) *Access denied: rights versus reality in disabled people's access to transport*. Available at: <https://publications.parliament.uk/pa/cm5901/cmselect/cmtrans/770/report.html>
- 55 UK Civil Aviation Authority (2024) *UK Aviation Consumer Survey, Wave Twelve and Wave Thirteen*. Available at: <https://www.caa.co.uk/data-and-analysis/data-for-passengers/uk-aviation-consumer-survey/>
- 56 DfT (2025) *NTS 2024: Household car availability and trends in car trips*. Available at: <https://www.gov.uk/government/statistics/national-travel-survey-2024/nts-2024-household-car-availability-and-trends-in-car-trips>
- 57 DfT (2024) *Our changing travel 2023*. Available at: <https://www.gov.uk/government/publications/our-changing-travel-2023>
- 58 DfT (2025) *NTS 2024: NTS0802 Satisfaction with provision by mode: England, 2016 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts08-availability-and-distance-from-key-local-services#full-publication-update-history>
- 59 Transport Focus (2025) *Strategic Roads User Survey 2024-25*. Available at: <https://www.transportfocus.org.uk/publication/strategic-roads-user-survey-2024-25/>
- 60 Transport Focus (2020) *Strategic Roads User Survey: Analysis of key drivers of overall satisfaction*. Available at: <https://www.transportfocus.org.uk/publication/strategic-road-users-survey/>
- 61 DfT (2025) *NTS 2024 NTS0808: Difficulties travelling to work by mode of transport: England, 2002 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts08-availability-and-distance-from-key-local-services>
- 62 DfT (2022) *National road traffic projections*. Available at: <https://www.gov.uk/government/publications/national-road-traffic-projections>
- 63 DfT (2025) *TSGB1303: Public expenditure on transport by function*. Available at: <https://www.gov.uk/government/statistical-data-sets/transport-expenditure-tsgb13>
- 64 OECD (2026). *ITF Infrastructure Investment Dataset*. Available at: https://data-explorer.oecd.org/vis/?lc=en&d-f=DSD_INFRINV
- 65 Transport Focus (2025) *Logistics and Coach Survey 2025*. Available at: <https://www.transportfocus.org.uk/publication/logistics-and-coach-survey-2025/>
- 66 DfT (2025). *FUSION project: multimodal transport user data*. Available at: <https://www.gov.uk/government/publications/fusion-project-multimodal-transport-user-data>
- 67 Transport Focus (2023) *Motivations and barriers to bus usage*. Available at: <https://www.transportfocus.org.uk/publication/motivations-and-barriers-to-bus-usage/>
- 68 DfT (2023) *Increasing bus patronage through an audience strategy*. Available at: <https://www.gov.uk/government/publications/increasing-bus-patronage-through-an-audience-strategy/increasing-bus-patronage-through-an-audience-strategy>
- 69 Transport Focus (2023) *Bus passenger satisfaction – key driver analysis*. Available at: <https://www.transportfocus.org.uk/publication/bus-passenger-satisfaction-key-driver-analysis/>
- 70 Transport Focus (2025) *Your Bus Journey – the independent bus user survey – 2024 results*. Available at: <https://www.transportfocus.org.uk/publication/your-bus-journey-the-independent-bus-user-survey-2024-results/>
- 71 DfT (2024) *Our changing travel 2023*. Available at: <https://www.gov.uk/government/publications/our-changing-travel-2023>
- 72 DfT (2025). *FUSION project: multimodal transport user data*. Available at: <https://www.gov.uk/government/publications/fusion-project-multimodal-transport-user-data>
- 73 Transport Focus (2023) *Motivations and barriers to bus usage*. Available at: <https://www.transportfocus.org.uk/publication/motivations-and-barriers-to-bus-usage/>

- 74 DfT (2023) *Evaluation of the £2 bus fare cap*. Available at: <https://www.gov.uk/government/publications/evaluation-of-the-2-bus-fare-cap>
- 75 Transport Focus (2023) *Bus passenger satisfaction – key driver analysis*. Available at: <https://www.transportfocus.org.uk/publication/bus-passenger-satisfaction-key-driver-analysis/>
- 76 DfT (2023) *Increasing bus patronage through an audience strategy*. Available at: <https://www.gov.uk/government/publications/increasing-bus-patronage-through-an-audience-strategy/increasing-bus-patronage-through-an-audience-strategy>
- 77 Office of Rail and Road (2025) *Rail Fares Index 2024*. Available at: <https://www.gov.uk/government/statistics/rail-fares-index-2024>
- 78 Transport Focus (2024) *Motivations and barriers to train usage*. Available at: <https://www.transportfocus.org.uk/publication/motivations-and-barriers-to-train-usage/>
- 79 DfT (2025). *FUSION project: multimodal transport user data*. Available at: <https://www.gov.uk/government/publications/fusion-project-multimodal-transport-user-data>
- 80 Transport Focus (2025) *Rail User Survey – edition 42*. Available at: <https://www.transportfocus.org.uk/publication/rail-user-survey-edition-42/>
- 81 DfT (2025) *NTS 2024: NTS0303a Average number of trips, stages, miles and time spent travelling by mode: England, 2002 onwards*. Available at <https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons>
- 82 Active Travel England (2026) *Evidence assessment: Assessment of impacts from Active School Travel*. Available at: <https://www.gov.uk/government/publications/evaluating-the-impact-of-active-travel-investment>
- 83 DfT (2025) *NTS NOS0809e: Main barriers and encouragements to cycling, walking and walking to school: England, 2018 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts08-availability-and-distance-from-key-local-services> (2023 data is more recent)
- 84 DfT (2025) *NTS 2024: NTS0802 Satisfaction with provision by mode: England, 2016 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts08-availability-and-distance-from-key-local-services#full-publication-update-history>
- 85 Active Travel England (2026) *Evidence assessment: The Impacts of Interventions to Enable Walking and Wheeling*. Available at: <https://www.gov.uk/government/publications/evaluating-the-impact-of-active-travel-investment>
- 86 DfT (2021) *National Travel Attitudes Study: Wave 5*. Available at: <https://www.gov.uk/government/statistics/national-travel-attitudes-study-wave-5>
- 87 DfT (2024) *Reported road casualties Great Britain: road user risk, 2023 data*. Available at: <https://www.gov.uk/government/statistics/reported-road-casualties-great-britain-road-user-risk-2023/reported-road-casualties-great-britain-road-user-risk-2023-data>
- 88 DfT (2025) *National Travel Survey 2023: NTS0809c Main barriers to walking*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts08-availability-and-distance-from-key-local-services> (2023 is the most recent data)
- 89 DfT (2025) *National Travel Survey 2023: NTS0809d Main encouragements to walking and NTS0809f Main encouragements to walking to school*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts08-availability-and-distance-from-key-local-services> (2023 is the most recent data)
- 90 DfT (2024) *National Travel Attitudes Study: Wave 9*. Available at: <https://www.gov.uk/government/statistics/national-travel-attitudes-study-wave-9>
- 91 DfT (2024) *Reported road casualties Great Britain: road user risk, 2023 data*. Available at: <https://www.gov.uk/government/statistics/reported-road-casualties-great-britain-road-user-risk-2023/reported-road-casualties-great-britain-road-user-risk-2023-data>
- 92 DfT (2024) *National Travel Attitudes Study: Wave 9*. Available at: <https://www.gov.uk/government/statistics/national-travel-attitudes-study-wave-9>
- 93 DfT (2025) *NTS 2024: NTS0802 Satisfaction with provision by mode: England, 2016 onwards*. Available at: <https://www.gov.uk/government/statistical-data-sets/nts08-availability-and-distance-from-key-local-services#full-publication-update-history>
- 94 DfT (2024) *Understanding multistage journeys and what enables them*. Available at: <https://www.gov.uk/government/publications/understanding-multi-stage-journeys-and-what-enables-them>
- 95 DfT (2024) *Understanding multistage journeys and what enables them*. Available at: <https://www.gov.uk/government/publications/understanding-multi-stage-journeys-and-what-enables-them>
- 96 DfT (2026) *Multi-modal public transport and operational changes: Qualitative research findings report*. Available at: <https://www.gov.uk/government/publications/factors-influencing-multi-modal-public-transport-use>
- 97 DfT (2026) *Multi-modal public transport and operational changes: Qualitative research findings report*. Available at: <https://www.gov.uk/government/publications/factors-influencing-multi-modal-public-transport-use>
- 98 DfT (2026) *Multi-modal public transport and operational changes: Qualitative research findings report*. Available at: <https://www.gov.uk/government/publications/factors-influencing-multi-modal-public-transport-use>

99 Venables, A., Overman, H., Laird, J. (2014) *Transport investment and economic performance: Implications for project appraisal*. Available at: <https://www.gov.uk/government/publications/transport-investment-and-economic-performance-tiep-report>

100 Melo, P. C., Graham, D. J., & Brage-Ardao, R. (2013) *The productivity of transport infrastructure investment: A meta-analysis of empirical evidence*. Available at: <https://www.sciencedirect.com/science/article/pii/S0166046213000537>

101 World Health Organization (2022) *Cycling and walking can help reduce physical inactivity and air pollution, save lives and mitigate climate change*. Available at: <https://www.who.int/europe/news/item/07-06-2022-cycling-and-walking-can-help-reduce-physical-inactivity-and-air-pollution--save-lives-and-mitigate-climate-change>

102 World Health Organization (n.d.) *Health financing and economics – Health and wealth*. Available at: <https://www.who.int/teams/health-financing-and-economics/economic-analysis/health-and-wealth>

103 World Bank Group (2025) *Health, economic Growth and Jobs*. Available at: <https://www.worldbank.org/en/topic/health/brief/health-economic-growth-and-jobs>

104 The Health Foundation (2023) *Difficulties in job searching due to problems with transport*. Available at: <https://www.health.org.uk/evidence-hub/transport/social-exclusion/difficulties-in-job-searching-due-to-problems-with>

105 KPMG for Greener Journeys and DfT (2018). *Sustainable transport: The key to unlocking the benefits of new housing*. Available at: <https://greener-vision.com/publication/sustainable-transport-the-key-to-unlocking-the-benefits-of-new-housing/>

106 OECD (2015) *Does Regional Economic Growth Depend on Proximity to Urban Centres?* Available at: https://www.oecd.org/en/publications/does-regional-economic-growth-depend-on-proximity-to-urban-centres_5jz0t7fxh7wc-en.html

107 University of Cambridge (2025) *From Strategy to Strength: Making the UK's Industrial Vision a Reality*. Available at: <https://www.ciip.group.cam.ac.uk/reports-and-articles/from-strategy-to-strength-making-the-uks-industrial-vision-a-reality/>

108 DfT (2024) *Transport Statistics Great Britain: 2023 – Freight*. Available at: <https://www.gov.uk/government/statistics/transport-statistics-great-britain-2024/transport-statistics-great-britain-2023-freight>

