EVERYDAY CONCERNS
WHAT PEOPLE WANT FROM TRANSPORT

Stephen Frost
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IPPR

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ABOUT

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APPROACH

WHAT WE SET OUT TO DO

- Understand people's levels of satisfaction with transport in Britain today and the factors that underpin views on this.
- Assess the impact of transport in people's lives and, in particular, the role it plays in contributing to social exclusion.
- Consider the 'politics' of transport and the level of priority given to it as an electoral issue.
- Identify the publics priorities for transport improvements and the change needed to support more 'integrated' and multi-modal travel.
- Explore people's experience of safety while travelling.
- Test the impact of different frames on people's support for restricting driving on some local roads and investment in public transport.

METHODOLOGY

Polling was undertaken by More in Common using an online panel. Fieldwork was carried out between 1–4 April, 11–14 April and 10–12 May 2025. The sample sizes for each round of polling were over 2,000 (2,071, 2,277 and 2,094 respectively). Respondents have been weighted according to age/sex interlocked, region, and ethnicity, education and GE2024 vote. Results can be considered representative of GB adults.

Alongside standard socio-demographics this briefing also refers to seven British segments based on More in Common's core beliefs model.

KEY FINDINGS – PUBLIC PRIORITIES FOR TRANSPORT

- **Transport matters in people's everyday lives but it isn't the most salient political issue**, with cost of living, reducing poverty, health and immigration being higher priorities. The public do not see transport as a key issue at the ballot box, but this may in part be due to the belief that national government has more limited responsibility for improving it (between 31 per cent to 44 per cent for tested transport outcomes, compared to 77 per cent for immigration levels).

- **One in seven people in Britain (14 per cent) strongly agree that 'transport difficulties limit my everyday life',** with this rising to one in five (20 per cent) of those on the lowest incomes. Daily bus users (25 per cent) and those without a car (19 per cent) are most likely to experience risk factors for transport-related social exclusion.

- **Satisfaction with local transport far outstrips that for transport in Britain** (50 per cent locally compared to 30 per cent nationally). At both scales public transport is the leading factor in determining satisfaction levels: the cost of trains is the most common reason for dissatisfaction nationally and access to decent local buses is the most prevalent reason for local satisfaction. The majority of people feel that transport, particularly nationally, is getting worse (net satisfaction of -9 per cent nationally, and -1 per cent locally).

- **Reducing the cost of transport (across all modes) is the public's highest transport priority**. This is unsurprising given the cost of living has been considered one of the most important issue facing the country for several years. Most see investment in local transport as likely to deliver the most difference in their lives (30 per cent) with only those on the highest income putting a priority on investment in international transport.

- **The demand for interventions that create more pleasant and pedestrian friendly town centres and child-friendly streets is clear**, but the framing of policies aiming to deliver mode shift makes a big difference to the level of support they will receive from different voter groups. People consistently underestimate the level of support for policies aimed at reducing car use and promoting the shift to public and sustainable transport.

KEY FINDINGS – SAFETY MATTERS

- **Safety is second only to cost as a factor in people's everyday journeys**, with the public concerned about both the physical and social aspects of this. Women and disabled people are much more likely to feel unsafe whilst travelling, particularly at night. Half of people are concerned about the risk of violence or harassment on public transport (50 per cent and 51 per cent), with less concerned about the risk of violence (31 per cent). Women, younger people, black and minority ethnic groups and disabled people are the most concerned about these risks.

- **The behaviours of drivers is seen as a key safety issue for both those in a vehicle and those travelling actively or via public transport.** For those in a vehicle potholes are seen as the most important safety issue whereas the speed of vehicles on the road is key for those on walking, wheeling, cycling and using public transport. The majority of people would be willing to incur a delay in their journeys if it helped made roads safer with one in four (39 per cent) saying a journey taking 10 minutes longer would be acceptable.

- **The most popular safety policy is addressing anti social behaviour on public transport through increased staffing.** Pedestrian crossings, reducing the ability of cars to park on busy/narrow streets and creating school streets are all considered important in improving safety in local areas.

- **There is widespread public support for the government targeting zero fatalities and serious injuries on Britain's roads by 2040** (so-called 'Vision Zero'), but very high levels of scepticism that the government could achieve this objective.

1. HOW PEOPLE TRAVEL

WALKING IS THE MOST COMMON WAY TO GET AROUND

FIGURE 1: Over eight in 10 people (83 per cent) regularly walk, six in 10 drive (63 per cent) and one-third catch the bus (31 per cent) at least once a week

Question: Please indicate how often, if at all, you use the following methods of transport. Combining 'Daily', 'Several days a week' and 'Once a week'

Method	Percentage
Powerchair or mobility scooter	3%
Wheeling	3%
Scooters	4%
Tram	5%
Van (as driver)	6%
Walking with aids	9%
Metro/underground	10%
Cycling	13%
Train	14%
Bus	31%
Car or van (as passenger)	43%
Car (as driver)	63%
Walking	83%
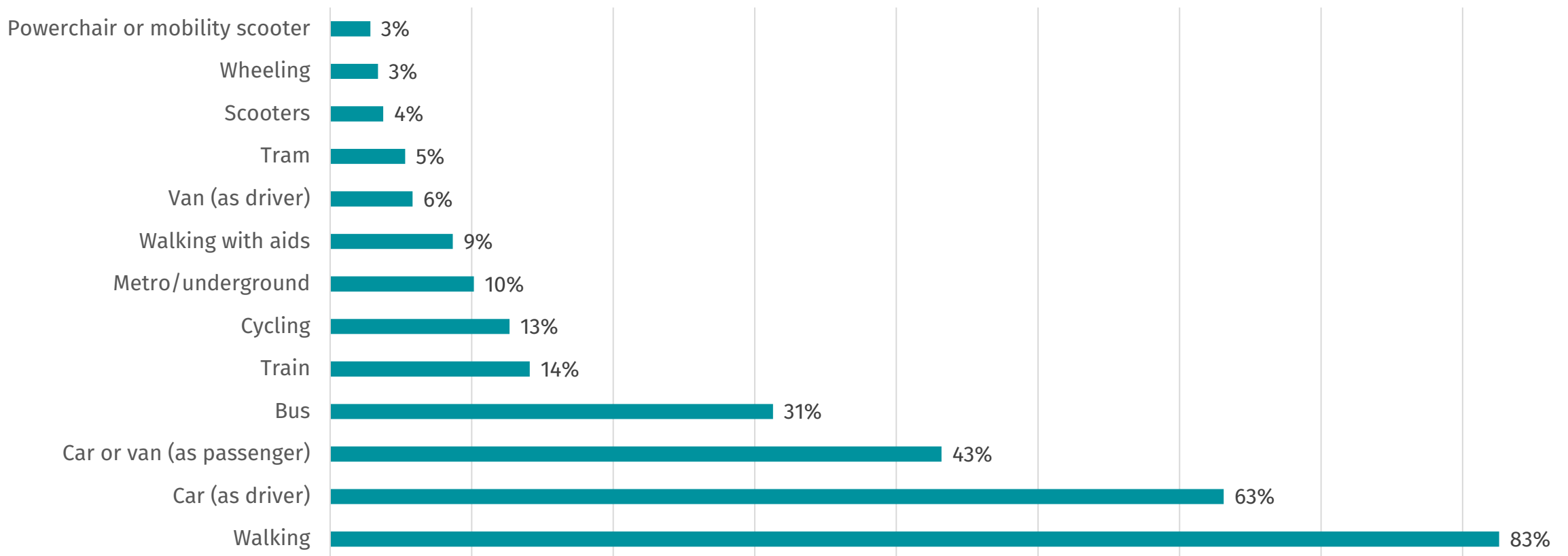
RURAL COMMUNITIES ARE MORE CAR DEPENDENT THAN URBAN ONES

FIGURE 2: Half of those living in urban areas drive regularly (53 per cent) compared to three quarters living in villages and rural areas (75 per cent). Walking is prevalent across geographies but cycling and local public transport use are more common in cities

Question: Please indicate how often, if at all, you use the following methods of transport. Combining 'Daily', 'Several days a week' and 'Once a week'

Legend: Walking, Car (as driver), Car or van (as passenger), Bus, Train, Cycling, Metro/underground

Category	Walking	Car (as driver)	Car or van (as passenger)	Bus	Train	Cycling	Metro/underground
Rural area / village	82%	75%	45%	21%	8%	8%	3%
Small town	82%	62%	43%	21%	10%	9%	4%
Large town	83%	65%	44%	33%	12%	13%	7%
Suburbs	80%	62%	43%	32%	14%	13%	11%
Urban / city centre	86%	53%	41%	50%	26%	20%	25%

THOSE ON THE HIGHEST AND LOWEST INCOME HAVE VERY DIFFERENT LEVELS OF CAR USE

FIGURE 3: Four in 10 (39 per cent) of those on the lowest income drive each week compared to over eight in 10 (84 per cent) of those on the highest income

Question: Please indicate how often, if at all, you use the following methods of transport. Combining 'Daily', 'Several days a week' and 'Once a week'

	Less than £19,999	£20,000 – £39,999	£40,000 – £79,999	£80,000 or more
Walking	83%	80%	82%	88%
Car (as driver)	39%	63%	72%	87%
Car or van (as passenger)	30%	41%	48%	52%
Bus	37%	31%	29%	31%
Train	10%	11%	14%	31%
Cycling	13%	11%	13%	24%
Metro/underground	8%	7%	11%	20%

HOW PEOPLE VOTE IS NOT LINKED TO HOW THEY TRAVEL BUT NON-VOTERS ARE THE LEAST LIKELY TO DRIVE

FIGURE 4: Almost half (45 per cent) of non-voters don't regularly drive compared to over eight in ten Conservative voters (84 per cent) and three quarters (75 per cent) of Labour voters
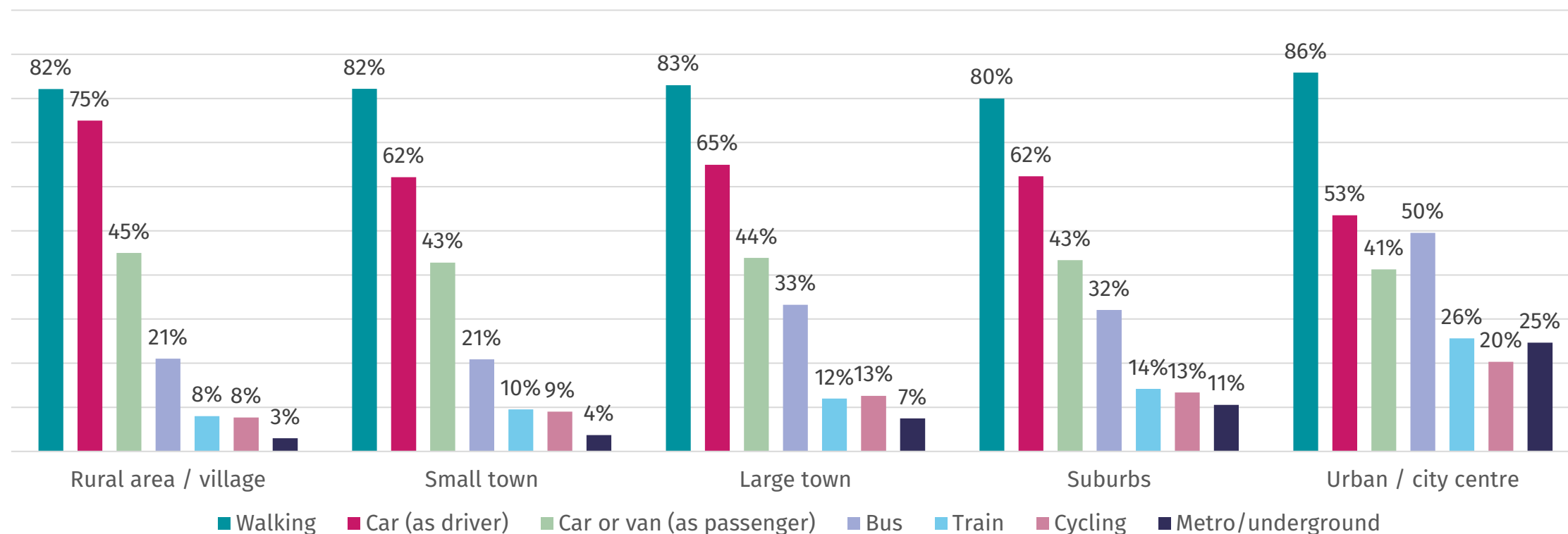
Question: Please indicate how often, if at all, you use the following methods of transport. Combining 'Daily', 'Several days a week' and 'Once a week'. Green party voters not shown due to low sample size

OTHER TRAVEL HABITS DIFFER BUT WALKING IS CONSISTENT ACROSS ALL SEVEN SEGMENTS

FIGURE 5: Walking is the most common way to travel across all voter groups but less than half (40 per cent) of disengaged battlers regularly drive and progressive activists are the most likely to regularly use buses, trains, metro/underground and cycle
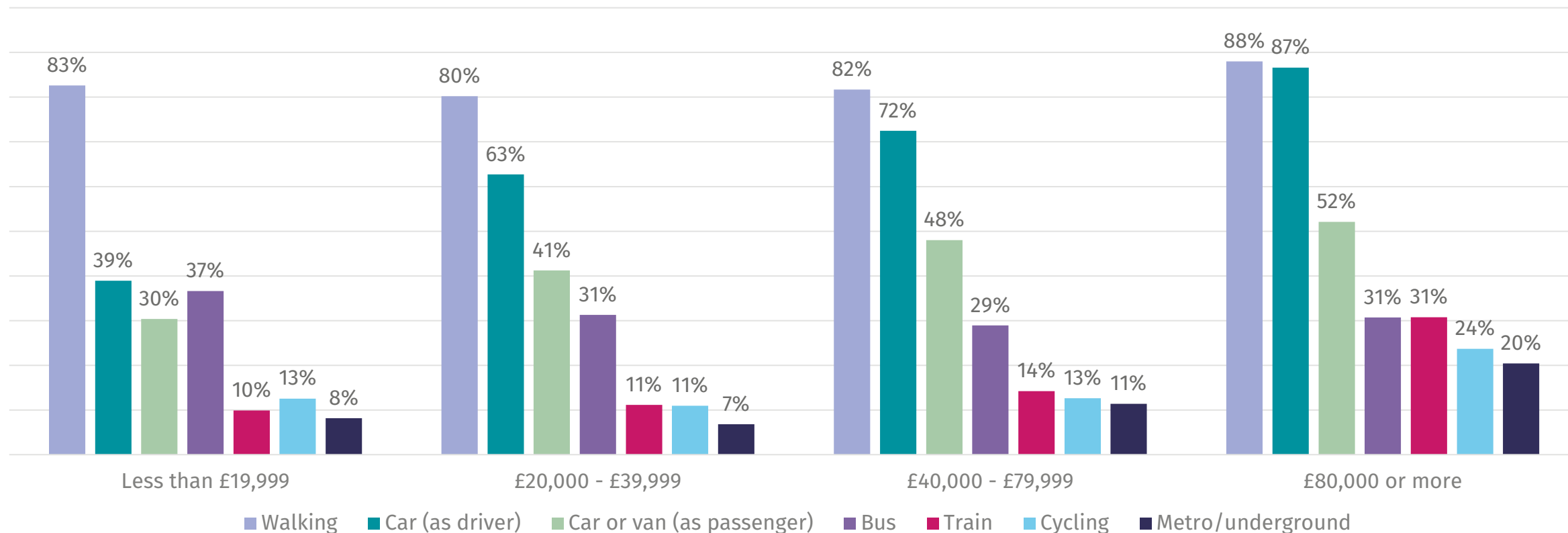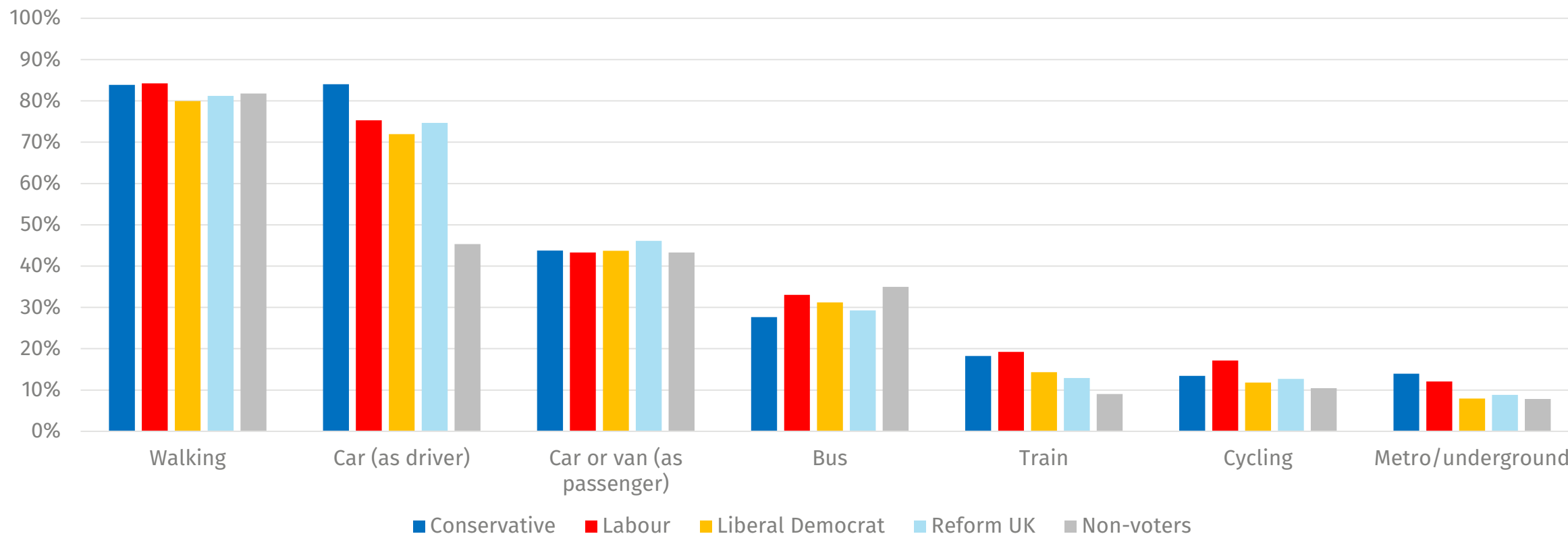
Question: Please indicate how often, if at all, you use the following methods of transport. Combining 'Daily', 'Several days a week' and 'Once a week'

Walking · Car [as driver] · Car or van [as passenger] · Bus · Train · Cycling · Metro/underground
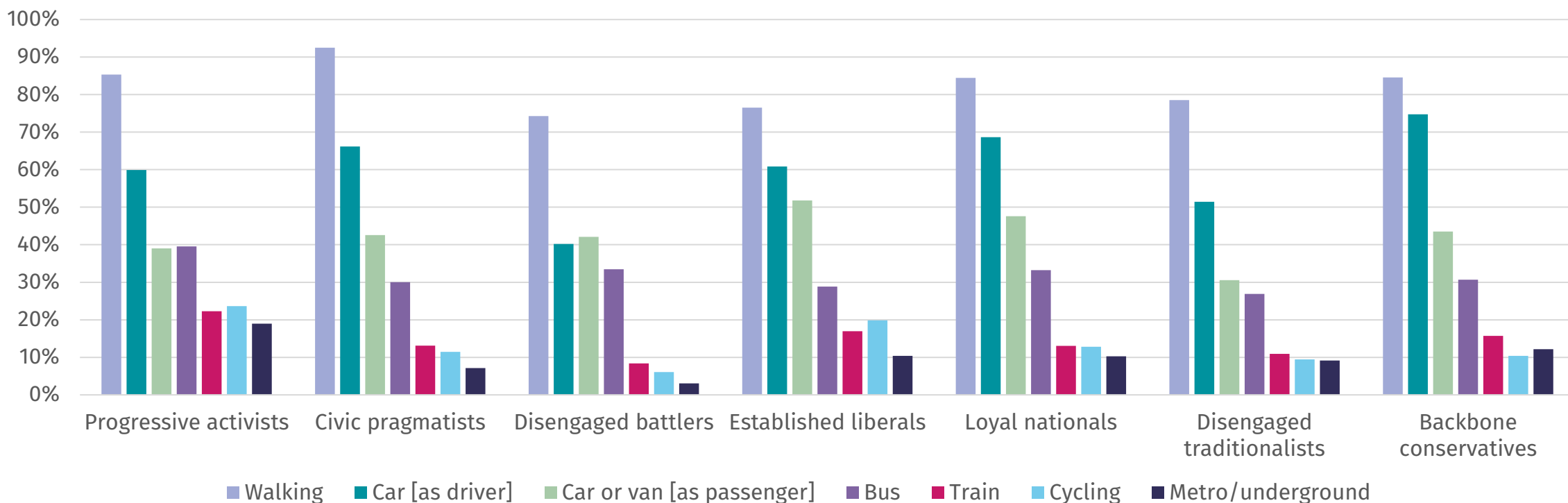
THOSE ON THE LOWEST INCOMES ARE FAR LESS LIKELY TO HAVE HOUSEHOLD ACCESS TO A CAR

FIGURE 6: Less than half (49 per cent) of those on the lowest income have household car access compared to almost all (97 per cent) of those on the highest incomes. Household car access is less common in urban centres (71 per cent) than rural areas (87 per cent)

Question: Proportion of those indicating that either they, or another member of their household, owns a car

Average	Less than £19,999	£20,000–£39,999	£40,000–£79,999	£80,000 or more	Rural area/village	Small town	Large town	Suburbs	Urban/city centre
78%	49%	77%	90%	97%	87%	79%	78%	77%	71%
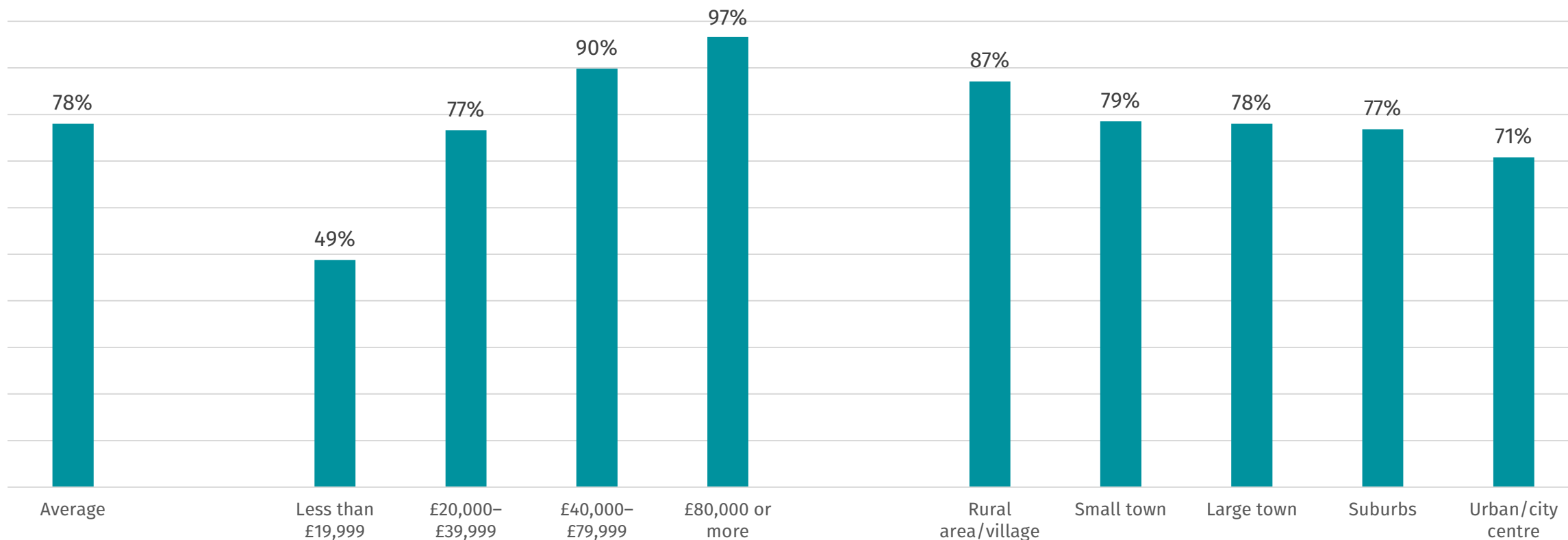
2. SATISFACTION WITH TRANSPORT

PEOPLE ARE MUCH MORE SATISFIED WITH LOCAL THAN NATIONAL TRANSPORT

FIGURE 7: Less than one-third of people (28 per cent) are satisfied with national transport compared to half (50 per cent) being satisfied with transport in their local area

Questions: 1) How satisfied or dissatisfied are you with transport in your local area? 2) How satisfied or dissatisfied are you with transport in Britain? Split sample, with half of respondents shown each question

	Very satisfied	Somewhat satisfied	Neither satisfied, nor dissatisfied	Don't know	Somewhat dissatisfied	Very dissatisfied
Transport in Britain	5%	25%	35%	2%	25%	9%
Local transport	12%	38%	27%	3%	14%	6%
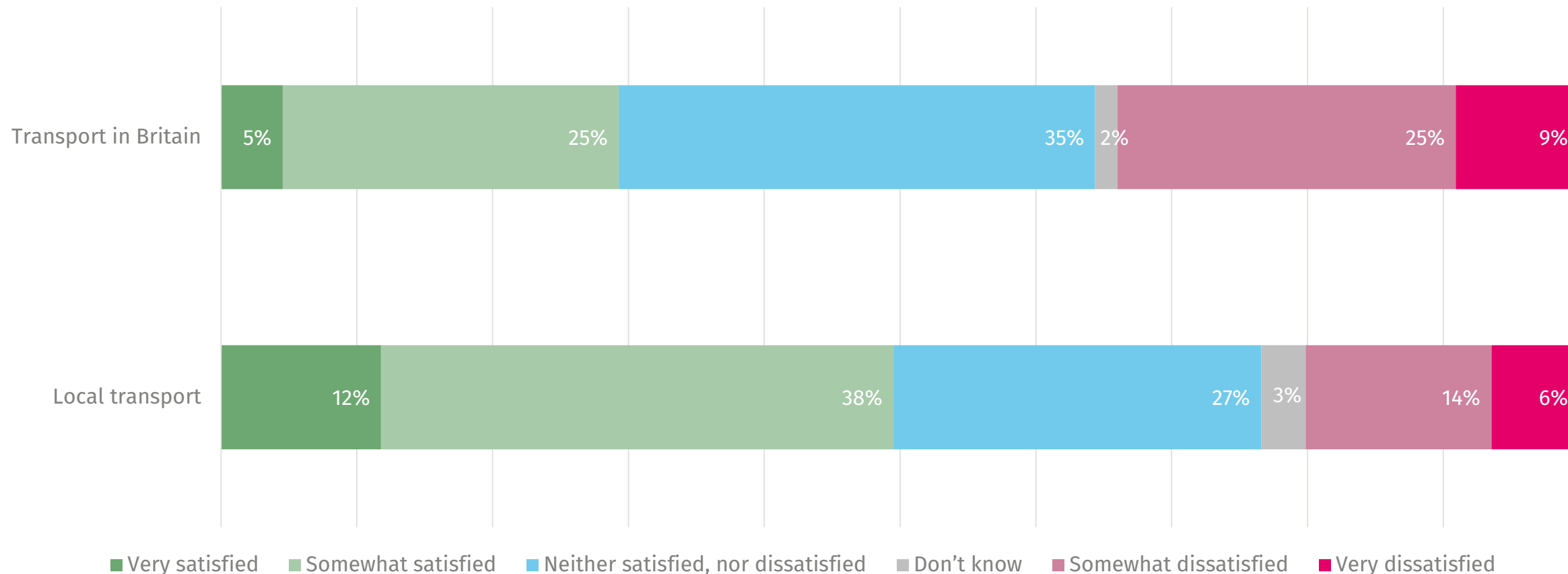
THOSE ON THE LOWEST INCOME ARE LEAST SATISFIED WITH TRANSPORT IN BRITAIN

FIGURE 8: Satisfaction with transport in Britain is consistently low outside of the most urban areas but particularly among those on the lowest income (-24 per cent net satisfaction compared to +17 per cent for those on the highest incomes)

Questions: 1) How satisfied or dissatisfied are you with transport in your local area? 2) How satisfied or dissatisfied are you with transport in Britain? All those satisfied minus all those dissatisfied. Split sample

Chart categories: All, Rural area/village, Large town, Urban/city centre, Less than £19,999, £40,000–£79,999

Local transport values: 29%, 13%, 23%, 30%, 27%, 50%, 25%, 26%, 38%, 40%

Transport in GB values: -5%, -8%, -18%, -6%, -1%, 11%, -24%, 0%, -1%, 17%

Legend: Local transport, Transport in GB
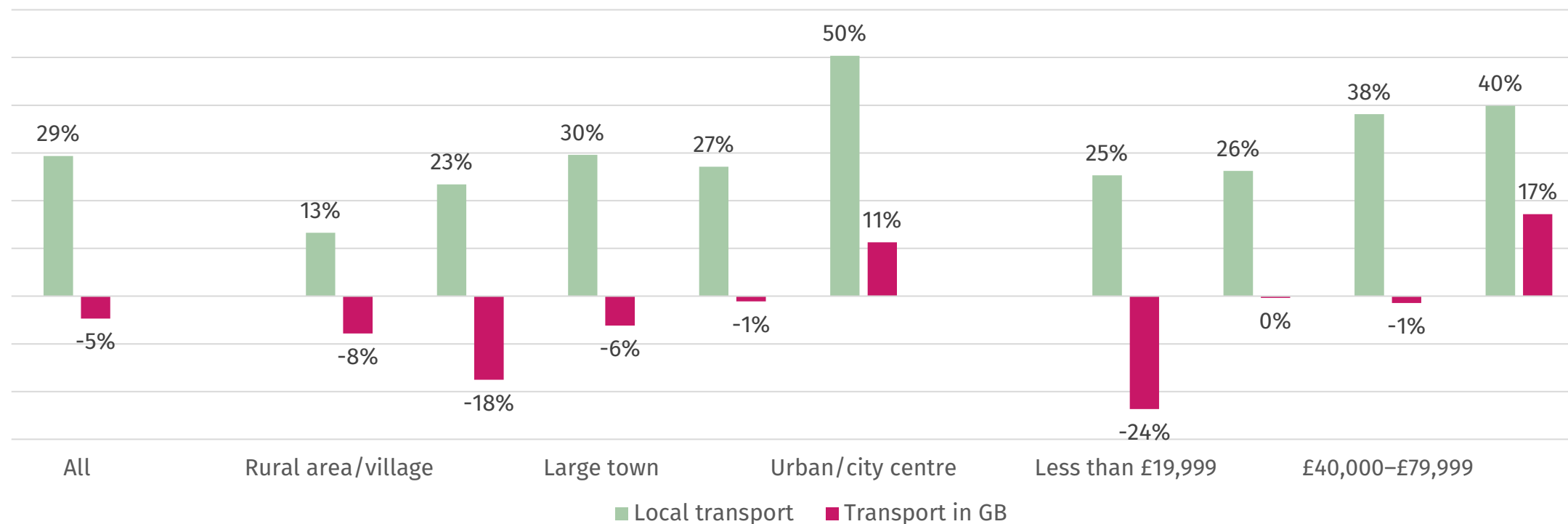
THE COST OF TRAINS IS THE BIGGEST DRIVER OF DISSATISFACTION WITH BRITAIN'S TRANSPORT

FIGURE 9: Half (49 per cent) of those dissatisfied with transport in Britain said the cost of trains contributed to this with over one-third saying the poor reliability of public transport (38 per cent) and condition of the roads (34 per cent)

Question: You said you <u>weren't</u> satisfied with transport in Britain, why is that? All options selected by at least 10 per cent of respondents. Split sample

Category	Percentage
Poor conditions of pavements	12%
Lack of integration between different transport operators	13%
Too much traffic	14%
Poor availability of trains	15%
Limited operating hours of public transport	17%
Poor availability of buses	21%
The cost of driving	24%
The cost of buses	25%
Poor conditions of roads	34%
Poor reliability of public transport	38%
The cost of trains	49%
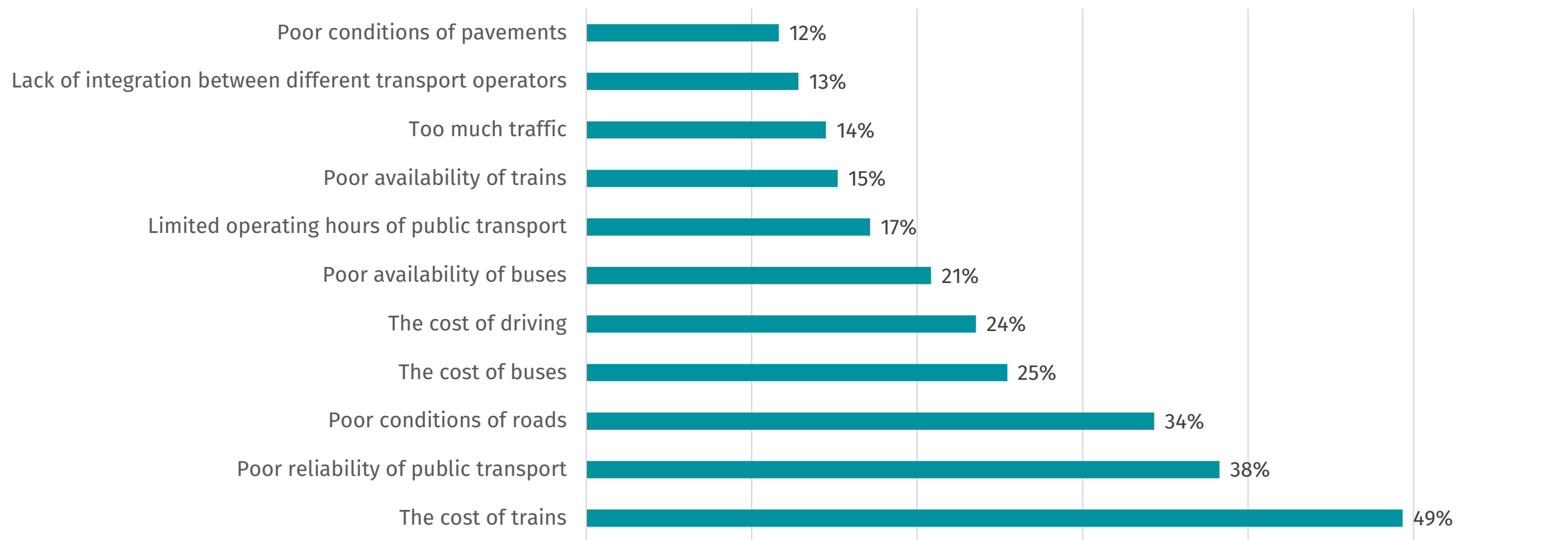
SATISFACTION WITH TRANSPORT IN BRITAIN IS TIED TO HAVING ACCESS TO DECENT PUBLIC TRANSPORT

FIGURE 10: Four in 10 (39 per cent) of those satisfied with transport in Britain said good availability of buses contributed to this

Question: You said you __were__ satisfied with transport in Britain, why is that? All options selected by at least ten per cent of respondents. Split sample

Affordable driving costs	12%
Good air quality	12%
Good accessibility of public transport	13%
Affordable train services	13%
Manageable traffic levels	17%
Convenient operating hours of public transport	24%
Good availability of trains	24%
Reliable public transport	25%
Affordable bus services	27%
Good availability of buses	39%

A LACK OF BUSES IS THE MAIN REASON FOR BEING DISSATISFIED WITH LOCAL TRANSPORT

FIGURE 11: Over half (53 per cent) of those dissatisfied with transport in their local area say poor availability of buses is a factor in this

Question: You said you <u>weren't</u> satisfied with transport in your local area, why is that? All options selected by at least 10 per cent of respondents. Split sample

Category	Percentage
Cost of driving a car	10%
Inadequate parking facilities	10%
Poor conditions of pavements	13%
Too much traffic	13%
Limited operating hours of public transport	23%
Cost of public transport	32%
Poor conditions of roads including potholes	33%
Poor reliability of public transport	39%
Poor availability of buses	53%
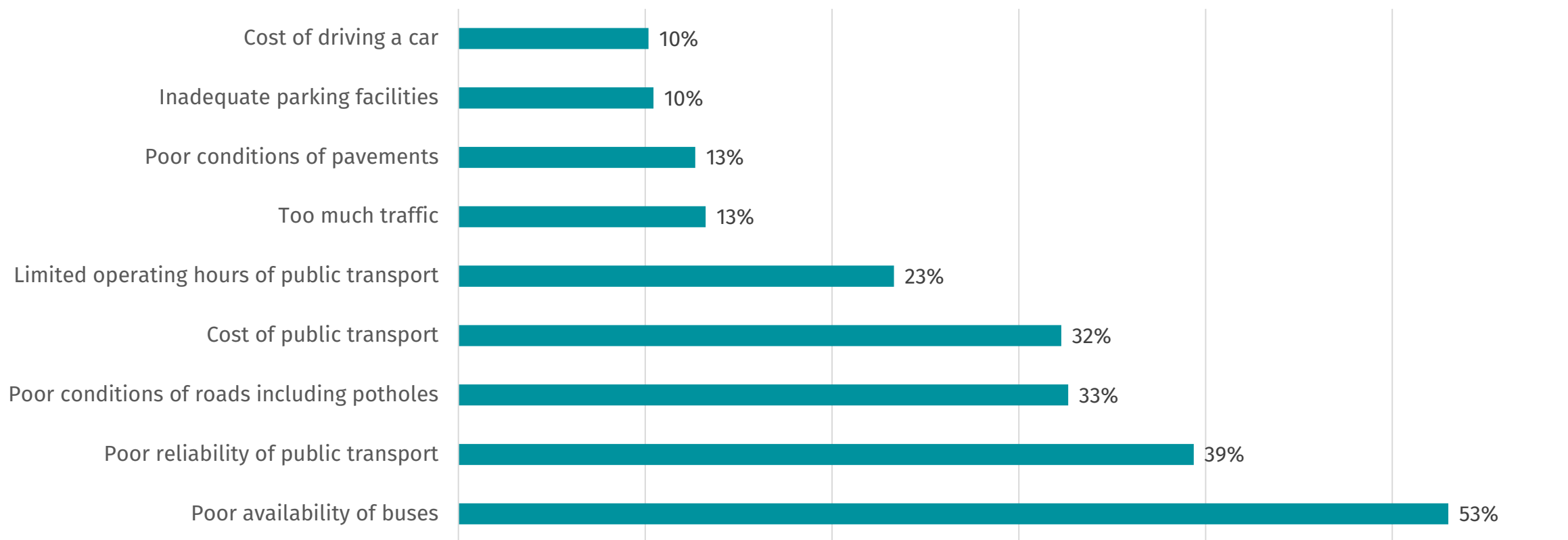
GOOD AVAILABILITY OF BUSES IS THE MOST COMMON REASON FOR BEING SATISFIED WITH LOCAL TRANSPORT

FIGURE 12: Half (50 per cent) of those satisfied with transport in their local area say good availability of buses is a factor in this
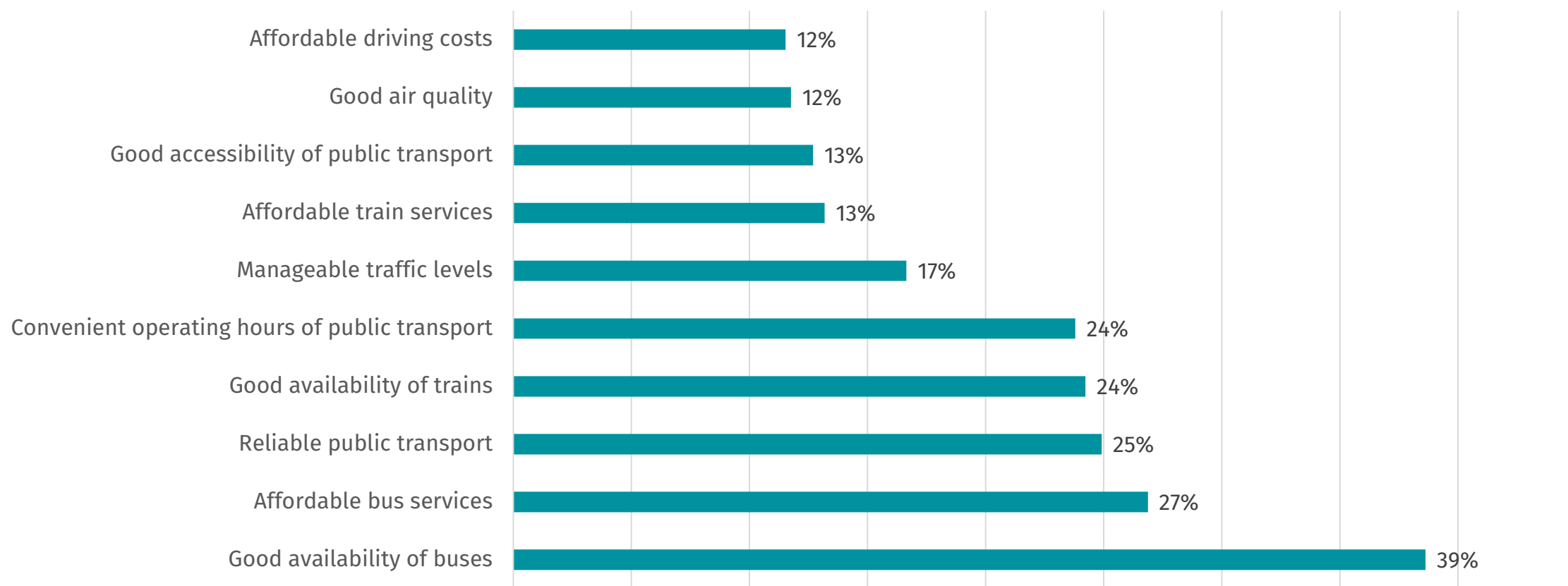
Question: You said you were satisfied with transport in your local area, why is that? All options selected by at least ten per cent of respondents. Split sample

Category	%
Good accessibility of public transport	10%
Convenient parking facilities	12%
Low traffic congestion	12%
Reliability of public transport	20%
Affordable public transport fares	24%
Good availability of trains	27%
Good connectivity to key destinations	28%
Convenient location of transport hubs/stations	30%
Good availability of buses	50%
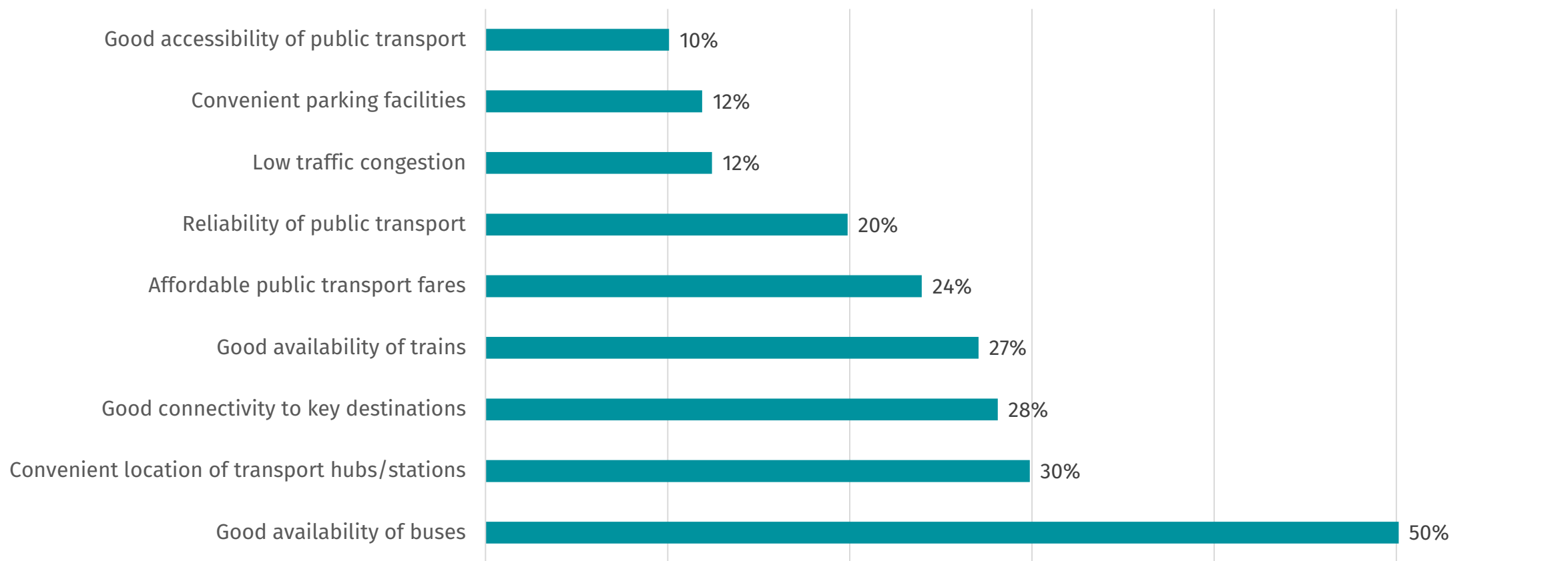
PEOPLE ARE MORE LIKELY TO THINK TRANSPORT IS GETTING WORSE, ESPECIALLY NATIONALLY

FIGURE 13: Net scores for transport improving are highest for people in urban areas and those on the highest incomes

Questions: 1) In recent years, do you think that Britain's transport system has got better or worse? 2) In recent years, do you think that transport has gotten better or worse in your local area. Net calculated as all those saying better minus all those saying worse. Split sample

	Britain's transport system	Local area
All	-9%	-1%
Less than £19,999	-12%	-8%
£20,000–£39,999	-15%	-8%
£40,000–£79,999	-9%	5%
£80,000 or more	26%	32%
Village/rural area	-28%	-11%
Small town	-19%	-13%
Large town	-5%	3%
Suburbs	-11%	5%
Urban/city centre	19%	14%
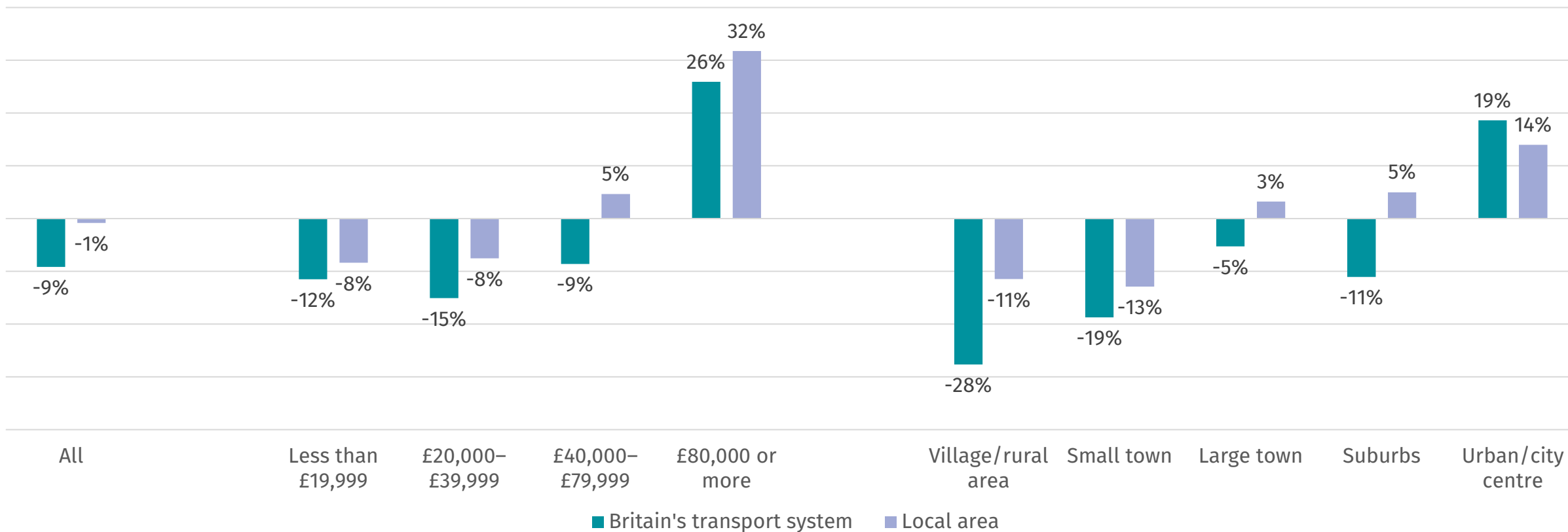
3. IMPACT OF TRANSPORT

A SIGNIFICANT MINORITY OF BRITONS ARE AT HIGH RISK OF TRANSPORT-RELATED SOCIAL EXCLUSION

FIGURE 14: One in seven (14 per cent) strongly feel transport is limiting their everyday life and many experience a high or medium risk of social exclusion due to transport difficulties

Question: Respondents were asked to indicate their level of agreement with the listed statements on an 11-point scale, with 0 meaning 'agree completely' and 10 meaning 'disagree completely'. Responses have been grouped into high agreement (0–3), medium agreement (4–6) and low agreement (7–10). These correspond with having a low, medium or high risk of experiencing transport related social exclusion

Statement	High risk	Medium risk	Low risk
I can't always get to the important places I need to with the transport options available	19%	32%	49%
My day-to-day journeys cause me significant stress or anxiety	17%	36%	47%
The money I spend on public transport and taxis makes it difficult to afford other essentials	17%	38%	45%
The time I spend on my day-to-day journeys makes it difficult to see friends and family as much as I would like	15%	35%	50%
The cost of running my car, van or motorbike makes it difficult to afford other essentials	18%	45%	37%
My day-to-day journeys are often delayed or disrupted	21%	34%	45%
Transport difficulties limit my everyday life	14%	30%	56%

■ High risk ■ Medium risk ■ Low risk

LIFE LIMITING TRANSPORT DIFFICULTIES ARE MORE COMMON AMONGST THOSE ON LOW INCOMES

FIGURE 15: People on the lowest incomes (20 per cent), daily bus users (25 per cent), disabled people (21 per cent) and non-car owners (19 per cent) are more likely to say transport difficulties are life limiting

Question: *Respondents were asked to choose between two paired statements on an 11-point scale. Below shows the agreement with the listed statement with 0 being inferred to mean 'agree completely' and 10 'disagree completely'. Responses have been grouped into high agreement (0–3), medium agreement (4–6) and low agreement (7–10). These correspond with having a low, medium or high risk of experiencing transport related social exclusion*

■ High risk ■ Medium risk ■ Low risk
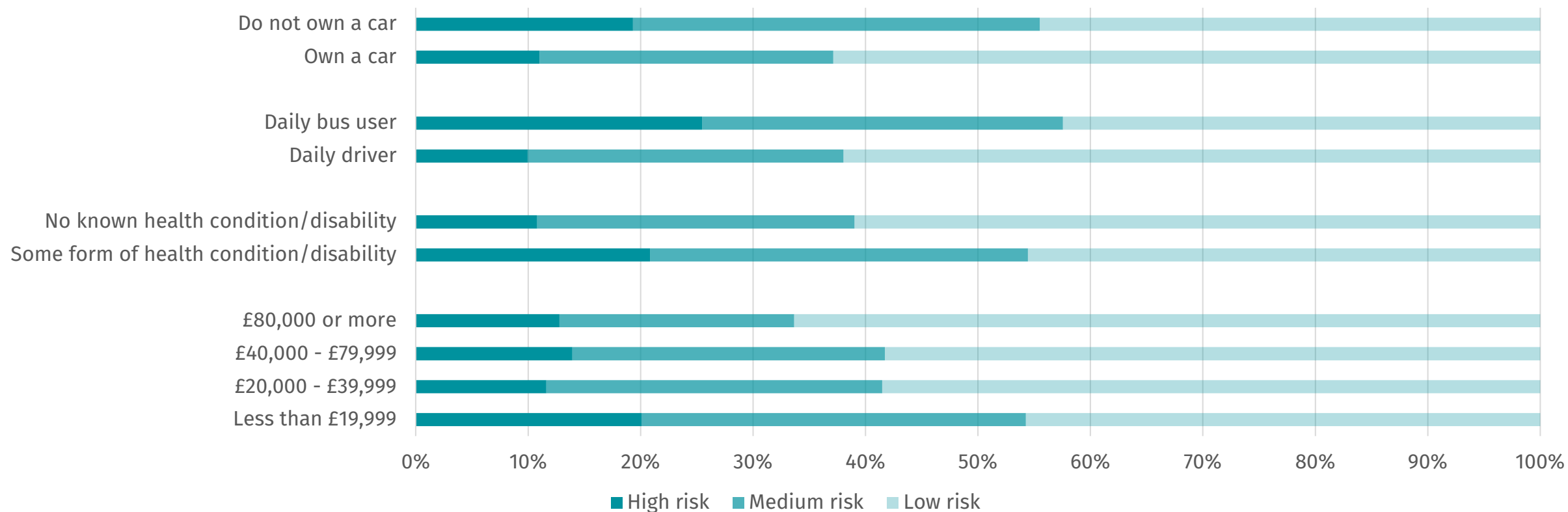
THE RISK FACTORS FOR TRANSPORT RELATED EXCLUSION ARE MORE COMMON IN HOUSEHOLDS WITHOUT A CAR

FIGURE 16: The majority (51 per cent) of those in households without car access experience at least one risk factor for transport related social exclusion compared to one in four (38 per cent) of those with car access

Assessment of the number of risk factors (detailed in figure 14) that different demographic are exposed to split by household income and household car access. Exposure to a risk factor is counted if someone shows high agreement with each of the six statements detailed in figure 14.

4. POLITICS OF TRANSPORT

TRANSPORT MATTERS BUT IT IS A LOWER PRIORITY THAN COST OF LIVING AND HEALTH

FIGURE 17: Reducing household energy bills and making it easier to access a GP appointment are seen as higher priorities than the highest ranking transport issue, with these also having greater personal significance

Questions: 1) To what extent do you think the following issues should be a priority for the government? 2) To what extent do you think the current government prioritises the following issues? 3) How important would it be for you and your family for the government to achieve the following? Split sample. Responses indicating a positive response have been grouped

	Should be a priority	Is a priority	Important to you and your family
Reducing households' energy bills	91%	45%	94%
Making it easier to access a GP appointment	94%	57%	87%
Making public transport more affordable	76%	39%	63%
Improving the quality of schools	83%	44%	60%
Increasing the provision of public transport	69%	35%	60%
Reducing the UK's carbon emissions	53%	45%	51%
Building new roads	47%	30%	49%
Reforming the House of Lords	39%	27%	34%

NEW ROADS ARE MUCH LESS IMPORTANT IN PEOPLE'S LIVES THAN BETTER PUBLIC TRANSPORT

FIGURE 18: All income groups rank public transport affordability and provision of public transport as important to them but new roads are seen as having low importance for those on low incomes (net score of -1 per cent compared to +34 per cent for those on the highest incomes)

Question: How important would it be for you and your family for the government to achieve the following? Split sample. Showing net score for positive sentiment minus negative

Make public transport more affordable: Average 29%, Less than £19,999 45%, £20,000 – £39,999 26%, £40,000 – £79,999 21%, £80,000 or more 44%

Increasing the provision of public transport: Average 21%, Less than £19,999 41%, £20,000 – £39,999 17%, £40,000 – £79,999 19%, £80,000 or more 39%

Build new roads: Average -1%, Less than £19,999 -19%, £20,000 – £39,999 -6%, £40,000 – £79,999 3%, £80,000 or more 34%

Legend: Average ▪ Less than £19,999 ▪ £20,000 – £39,999 ▪ £40,000 – £79,999 ▪ £80,000 or more

PUBLIC TRANSPORT IS SEEN AS A PRIORITY TO ALL VOTER GROUPS, ESPECTIALLY PROGRESSIVE VOTERS

FIGURE 19: Improving public transport is seen as a priority for all voters but building new roads is more divisive (net score -6 per cent with progressive voters and just +9 per cent with Conservative and Reform voters)

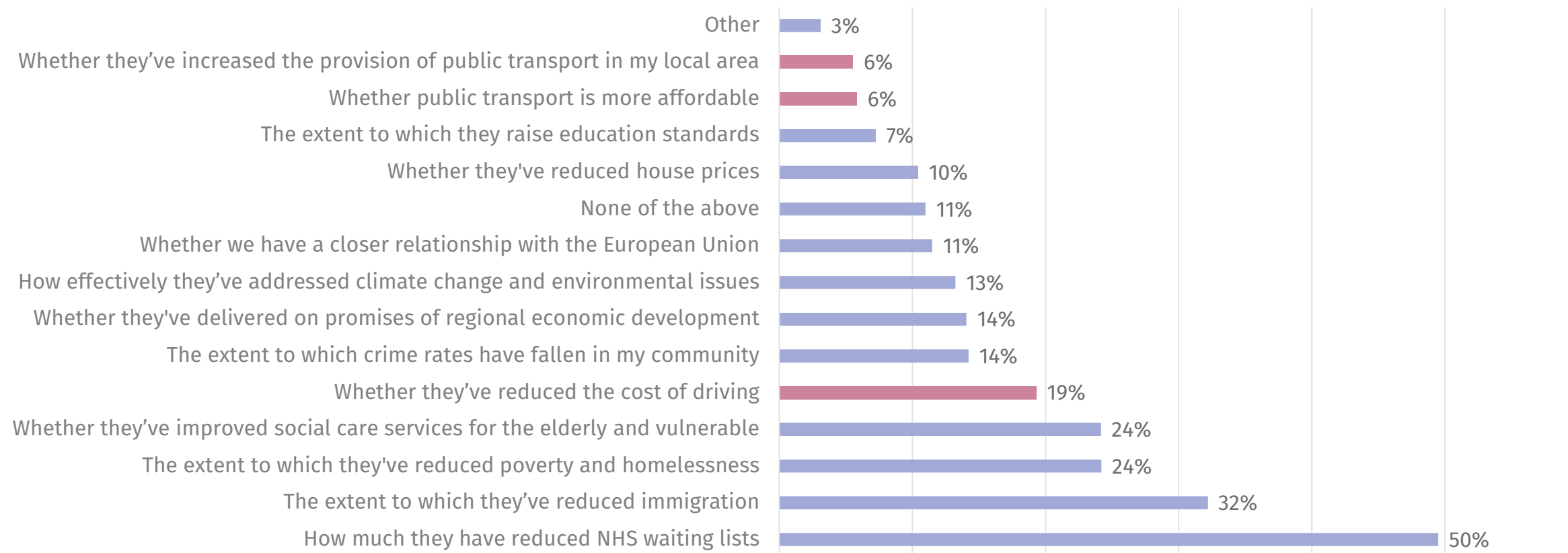*Question:* **To what extent do you think the following issues should be a priority for the government? Split sample. Showing net score for positive sentiment minus negative**
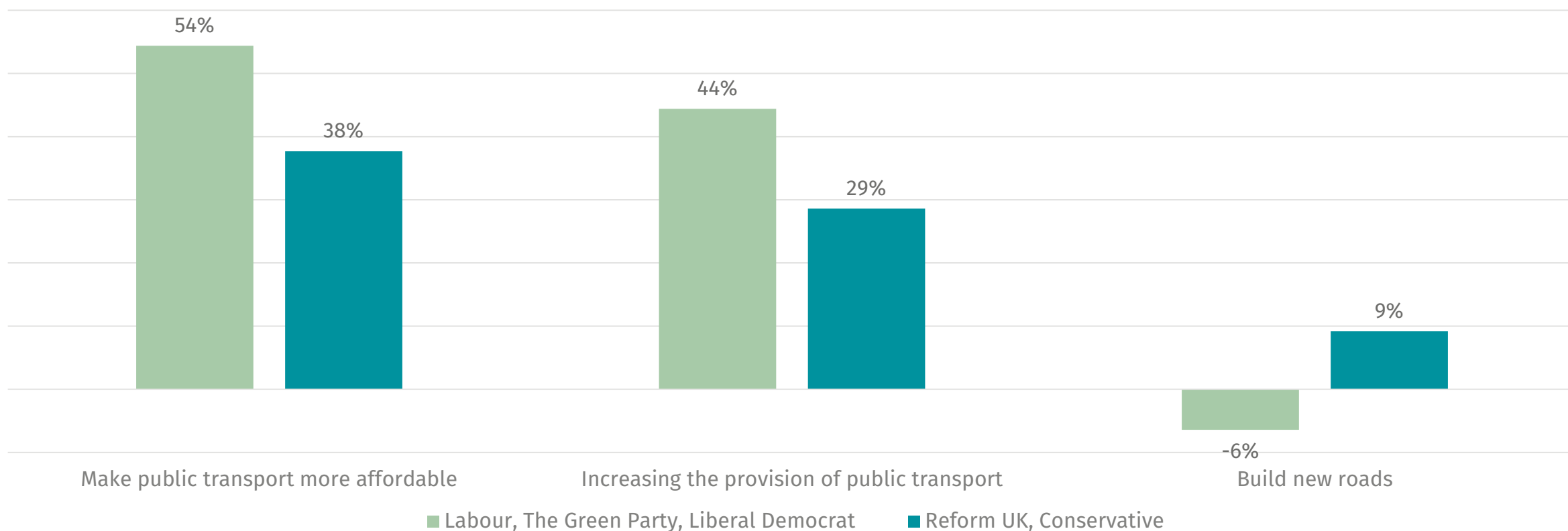
TRANSPORT IS NOT PEOPLE'S MOST IMPORTANT TEST OF LABOUR'S SUCCESS IN GOVERNMENT

FIGURE 20: Reducing NHS waiting lists is considered a more important test of whether Labour have improved people's lives than any transport outcome

Question: Which of the following do you think will be most important for judging whether the Labour government has improved your everyday life in five years' time? People could select up to three

Category	%
Other	3%
Whether they've increased the provision of public transport in my local area	6%
Whether public transport is more affordable	6%
The extent to which they raise education standards	7%
Whether they've reduced house prices	10%
None of the above	11%
Whether we have a closer relationship with the European Union	11%
How effectively they've addressed climate change and environmental issues	13%
Whether they've delivered on promises of regional economic development	14%
The extent to which crime rates have fallen in my community	14%
Whether they've reduced the cost of driving	19%
Whether they've improved social care services for the elderly and vulnerable	24%
The extent to which they've reduced poverty and homelessness	24%
The extent to which they've reduced immigration	32%
How much they have reduced NHS waiting lists	50%

PEOPLE CONSIDER THE GOVERNMENT TO BE LESS RESPONSIBLE FOR TRANSPORT THAN OTHER AREAS

FIGURE 21: Transport outcomes are considered less in the government's control to deliver than other outcomes, with less than half of people considering the government to have significant responsibility for any mode of transport

Question: Please indicate whether the UK government or other factors are more responsible for determining the following. Grouping 'almost entirely' and 'mainly responsible' response options

Category	%
Convenience and safety of cycling	31%
Experience of people walking or getting around in a wheelchair	33%
The availability of buses	35%
The availability of trains	37%
The cost of buses	41%
The cost of trains	42%
The cost of driving a car	44%
The number of homes built in Britain	53%
The level of economic growth	61%
The amount of renewable energy generated in the UK	61%
The length of NHS waiting lists	65%
Inflation levels	67%
The number of police on the street	74%
Legal migration levels	77%
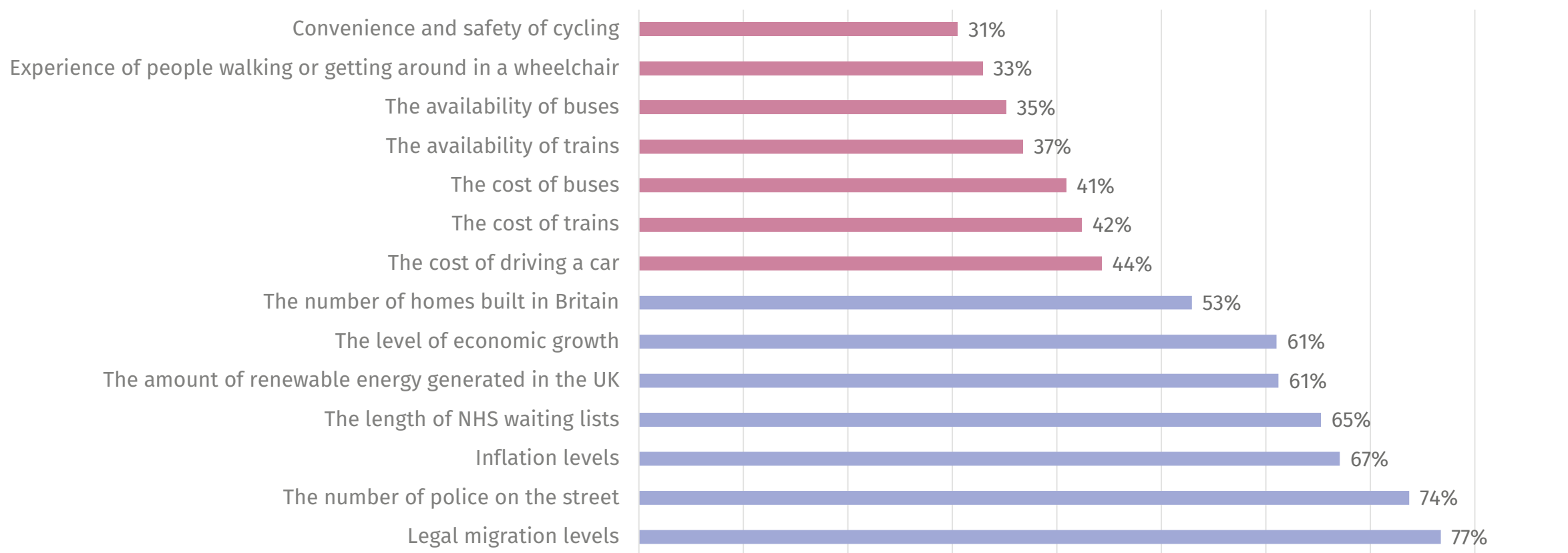
PEOPLE IN URBAN AREAS ARE MORE LIKELY TO SEE THE GOVERNMENT AS RESPONSIBLE FOR PUBLIC TRANSPORT

FIGURE 22: Daily drivers and those in rural areas put more responsibility on the government for the cost of driving, in contrast regular bus users and those in urban areas see the government as having more responsibility for public transport

Question: Please indicate whether the UK government or other factors are more responsible for determining the following. Grouping 'almost entirely' and 'mainly responsible' response options

CONFIDENCE IN BOTH UK AND LOCAL GOVERNMENT TO IMPROVE LIVES IS LOW

FIGURE 23: Just one in 20 (5 per cent) of Britons have 'a great deal of confidence' in either UK or local government's ability to make life better

Questions: 1) How much confidence do you have in the ability of the UK government to meaningfully improve Britons' everyday lives?
2) How much confidence do you have in the ability of local government to meaningfully improve people's everyday lives in your area?
Split sample

	A great deal of confidence	Some confidence	Not very much confidence	No confidence at all
Local government	5%	27%	44%	24%
UK government	5%	28%	37%	30%
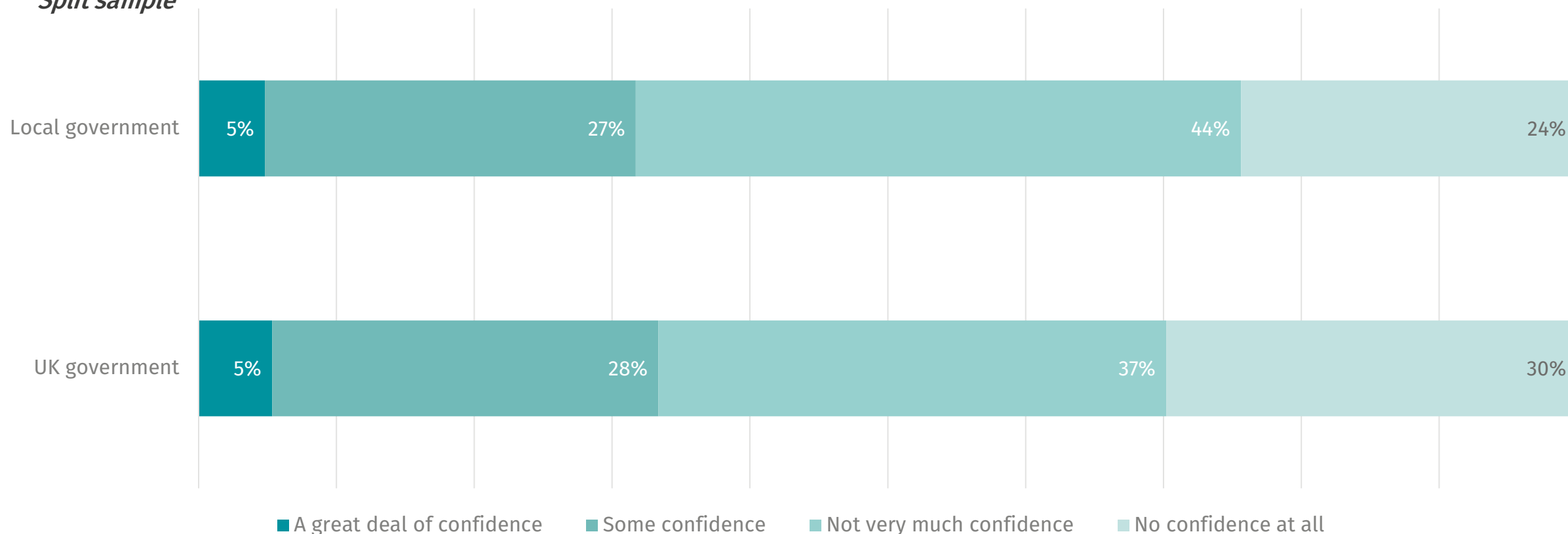
5. PRIORITIES FOR TRANSPORT
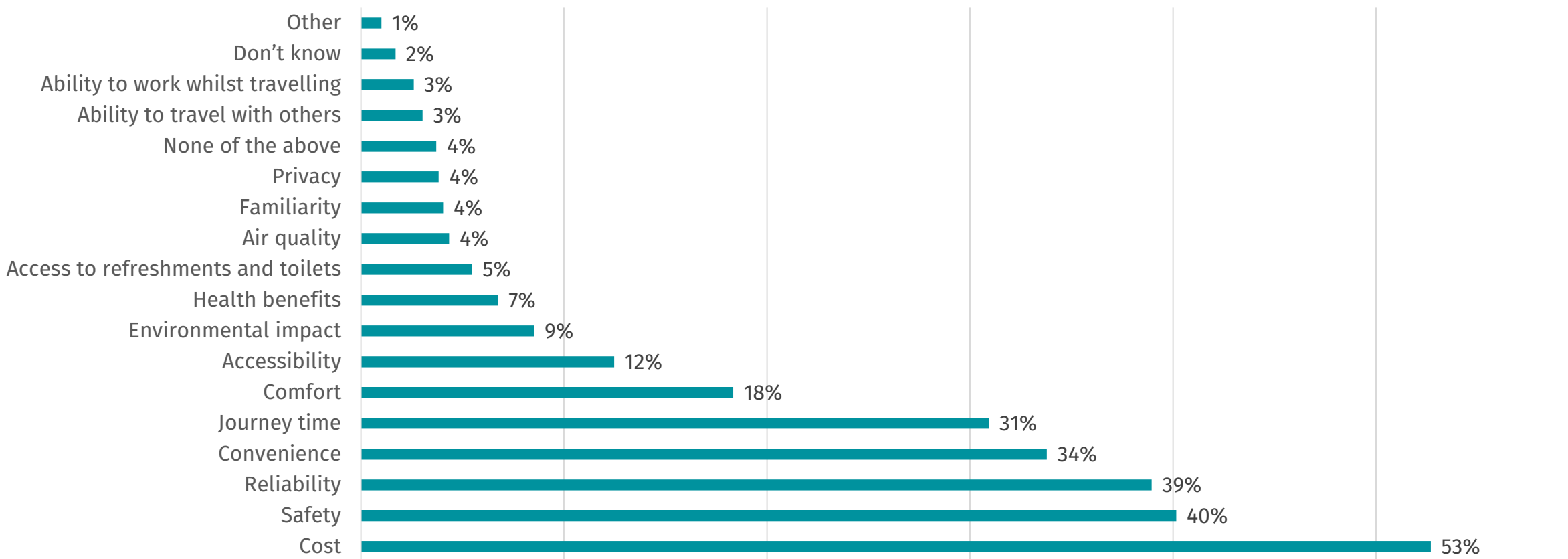
IMMEDIATE AND PRACTICAL CONCERNS ARE THE MOST IMPORTANT FACTORS IN EVERYDAY JOURNEYS

FIGURE 24: Cost (53 per cent), safety (40 per cent) and reliability (39 per cent) are the most important factors in people's regular journeys

Question: Thinking about the everyday journeys you make, what are the factors that are most important for you for a typical journey? Select up to three

Factor	Percentage
Other	1%
Don't know	2%
Ability to work whilst travelling	3%
Ability to travel with others	3%
None of the above	4%
Privacy	4%
Familiarity	4%
Air quality	4%
Access to refreshments and toilets	5%
Health benefits	7%
Environmental impact	9%
Accessibility	12%
Comfort	18%
Journey time	31%
Convenience	34%
Reliability	39%
Safety	40%
Cost	53%

REDUCING COSTS, PARTICULARLY OF TRAINS, IS THE PUBLIC'S HIGHEST TRANSPORT PRIORITY

FIGURE 25: Cheaper trains (34 per cent), driving (26 per cent) and buses (23 per cent) are the top three priorities for improving transport

Question: What would be your top priorities for improving transport to make your experiences of travelling better? Select up to three

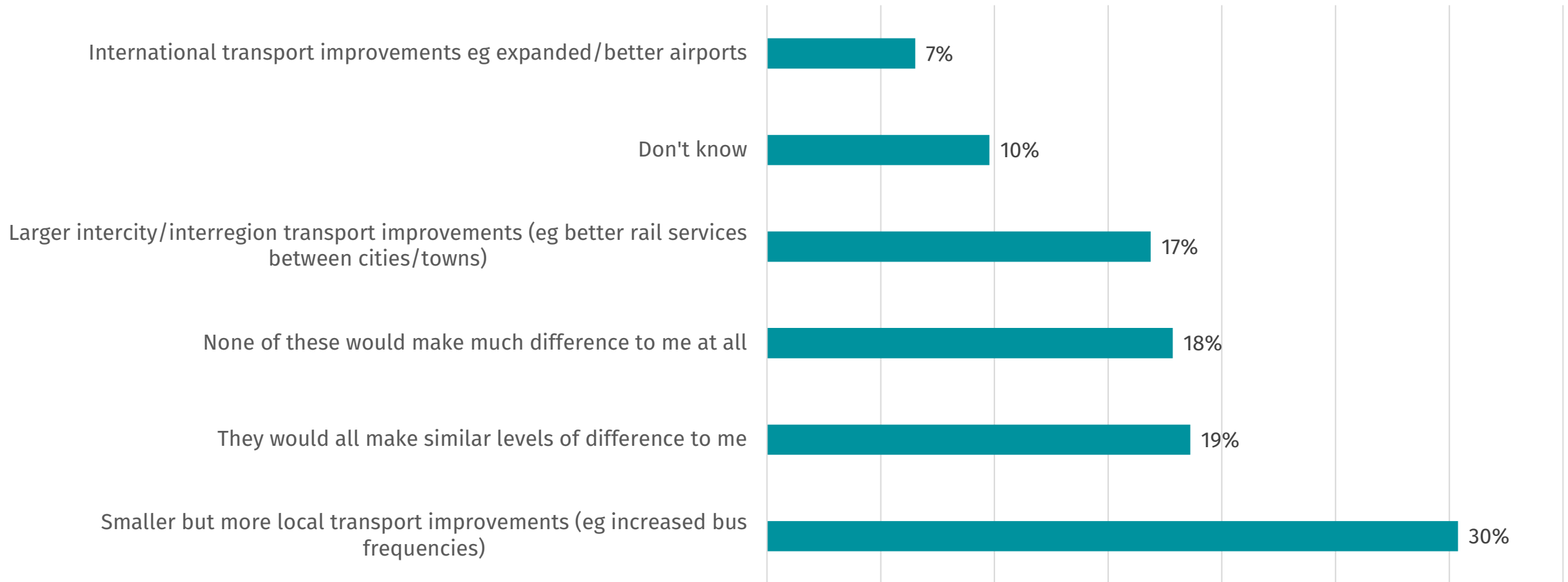| Category	Percentage
Other	4%
Making it safer/easier to get around on foot or by wheelchair	6%
Making public transport more accessible	6%
None of the above	6%
Making it safer/easier to cycle	7%
Making it safer to use trains	7%
Running public transport services until later at night.	8%
Making it safer to use buses	9%
Increasing the availability of trains in your local area	9%
Running public transport services later at night or from earlier in the morning	12%
Making it safer/easier to drive	13%
Reducing traffic so car journeys are more reliable	13%
Increasing the availability of buses in your local area.	16%
Making trains more reliable	17%
Making it easier to park cars	21%
Making buses more reliable	21%
Making it cheaper to use buses	23%
Making it cheaper to drive	26%
Making it cheaper to use trains	34%

LOCAL TRANSPORT IMPROVEMENTS WOULD MAKE THE MOST DIFFERENCE TO PEOPLE'S LIVES

FIGURE 26: Three in 10 (30 per cent) say that local transport improvements would make the most positive difference to their lives

Question: Which type of transport investment would make the most positive difference to your life?

Category	Percentage
International transport improvements eg expanded/better airports	7%
Don't know	10%
Larger intercity/interregion transport improvements (eg better rail services between cities/towns)	17%
None of these would make much difference to me at all	18%
They would all make similar levels of difference to me	19%
Smaller but more local transport improvements (eg increased bus frequencies)	30%

THOSE ON LOWER INCOMES FAVOUR INVESTMENT IN LOCAL TRANSPORT

FIGURE 27: Lower earners favour investment in local transport (38 per cent in contrast to 20 per cent of the highest earners) with a significant proportion of higher earners naming investment in international transport as making the most difference in their lives (18 per cent versus less than 2 per cent of those lowest earners)
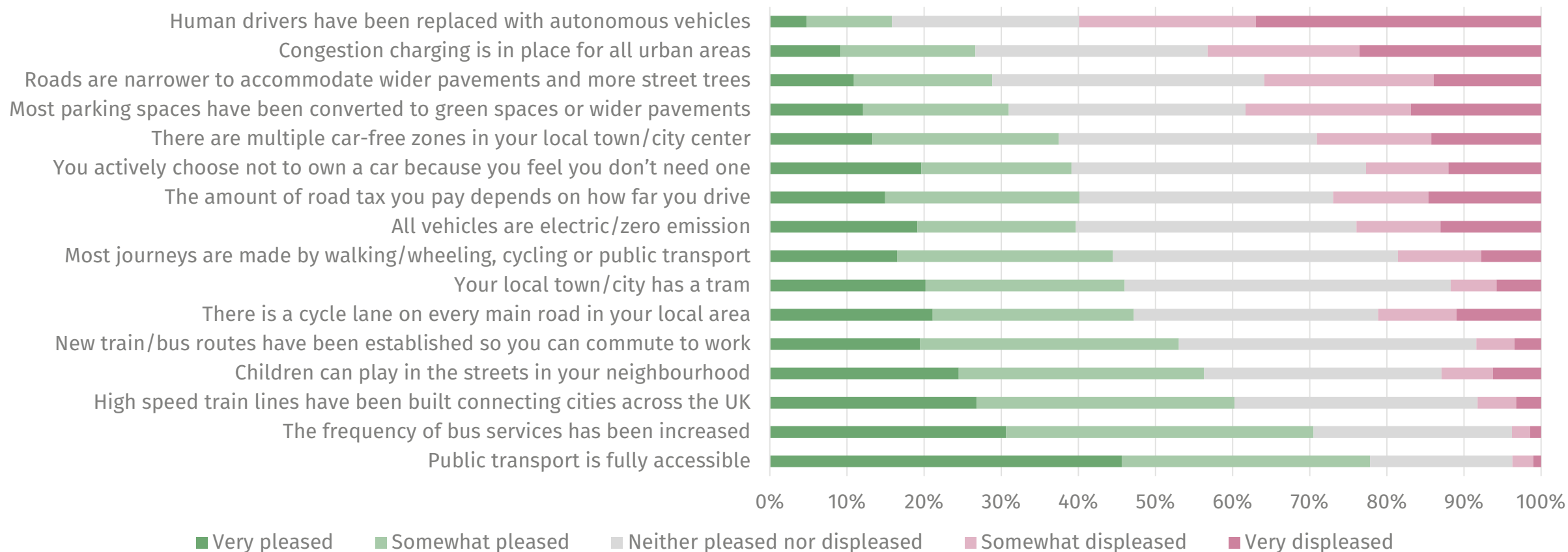
Question: Which type of transport investment would make the most positive difference to your life?

Stacked bar chart showing percentages by income band:

	Less than £19,999	£20,000–£39,999	£40,000–£79,999	£80,000 or more
International transport improvements eg expanded/better airports		6%	7%	18%
Don't know	17%	5%	8%	5%
Larger intercity/interregion transport improvements (eg better rail services between cities/towns)	12%	17%	19%	26%
None of these would make much difference to me at all	20%	23%	16%	6%
They would all make similar levels of difference to me	11%	18%	22%	26%
Smaller but more local transport improvements (eg increased bus frequencies)	38%	32%	28%	20%

PEOPLE WANT A FUTURE WITH BETTER PUBLIC TRANSPORT AND CHILD-FRIENDLY STREETS

FIGURE 28: Public transport accessibility (78 per cent) and bus frequency (70 per cent) are significantly more desirable than driverless cars (16 per cent)
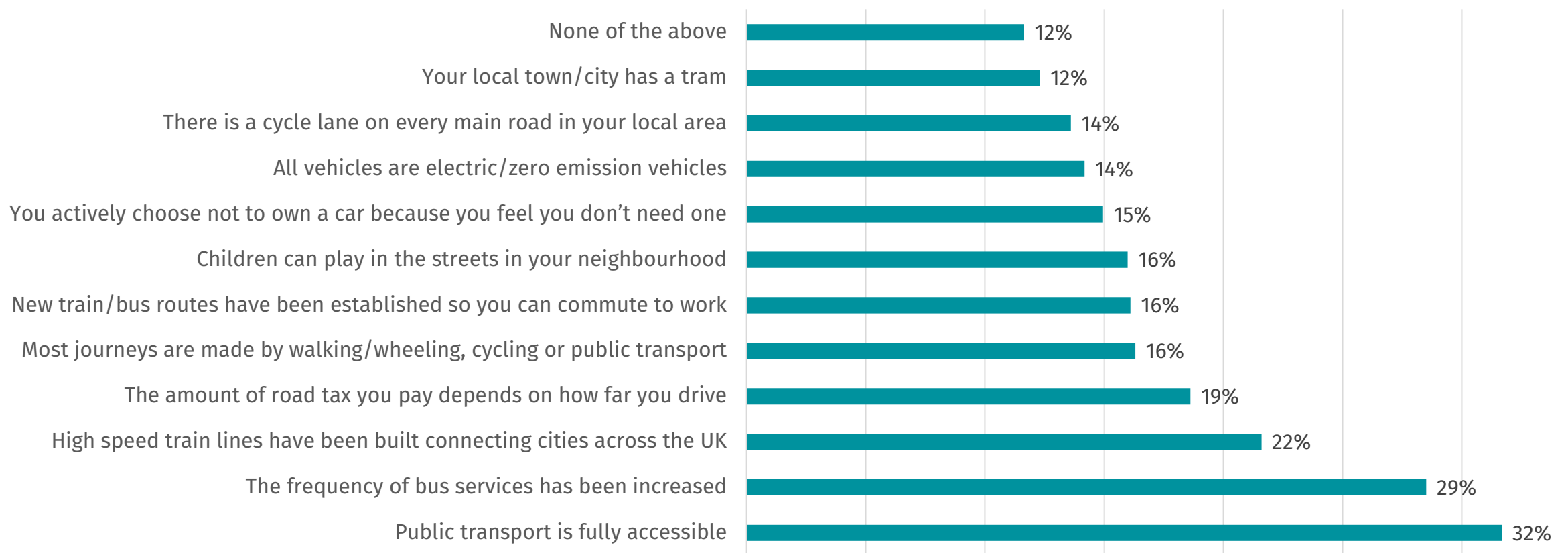
Question: Please indicate whether you would be pleased or displeased if the following statements were true about transport in your local area in 25 years time

Legend: ■ Very pleased ■ Somewhat pleased ■ Neither pleased nor displeased ■ Somewhat displeased ■ Very displeased

IMPROVING PUBLIC TRANSPORT ACCESSIBILITY AND BUS FREQUENCY ARE KEY PRIORITIES

FIGURE 29: One-third (32 per cent) consider making public transport fully accessible a top priority and three in 10 (29 per cent) back increasing the frequency of buses
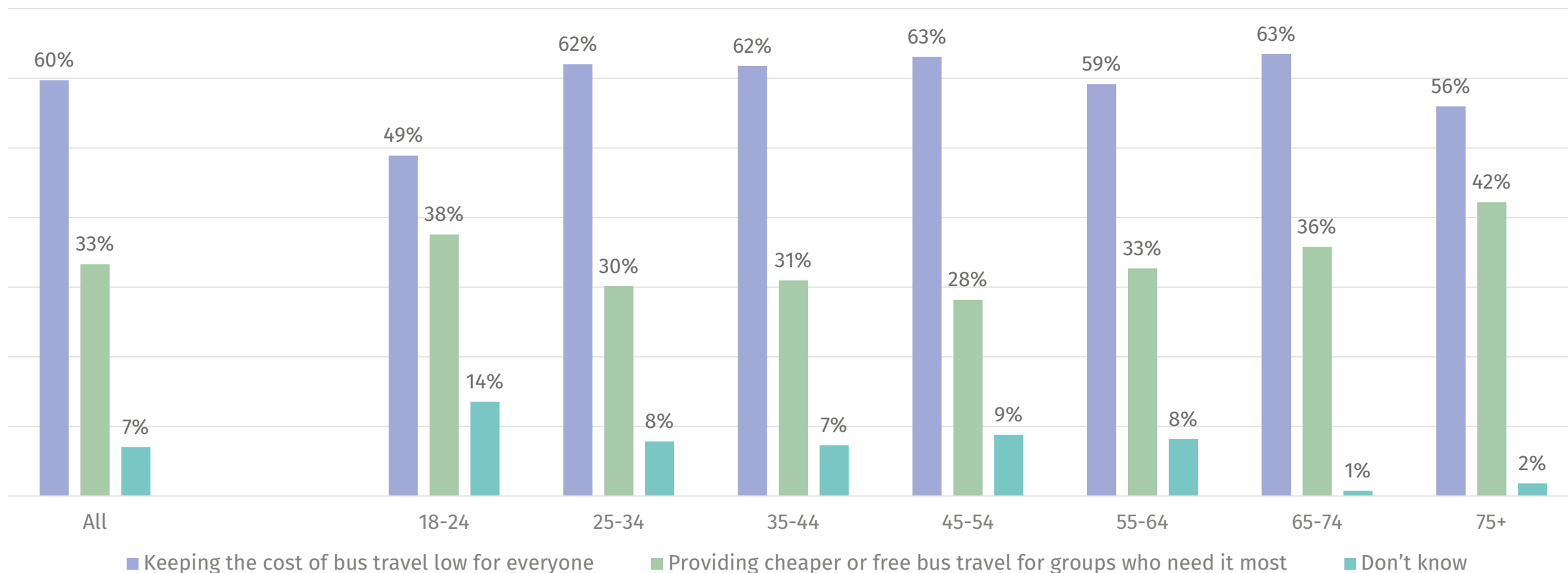
Question: Looking at the same list of potential changes to transport in your local area in 25 years' time. Which of them would be your top priorities? All options selected by at least 10 per cent of respondents

Option	Percentage
None of the above	12%
Your local town/city has a tram	12%
There is a cycle lane on every main road in your local area	14%
All vehicles are electric/zero emission vehicles	14%
You actively choose not to own a car because you feel you don't need one	15%
Children can play in the streets in your neighbourhood	16%
New train/bus routes have been established so you can commute to work	16%
Most journeys are made by walking/wheeling, cycling or public transport	16%
The amount of road tax you pay depends on how far you drive	19%
High speed train lines have been built connecting cities across the UK	22%
The frequency of bus services has been increased	29%
Public transport is fully accessible	32%

LOWER BUS FARES FOR EVERYONE IS SEEN AS A HIGHER PRIORITY THAN SPECIFIC CONCESSIONS

FIGURE 30: Six in 10 (60 per cent) see keeping the cost of bus travel low for everyone as a higher priority than concessionary fares
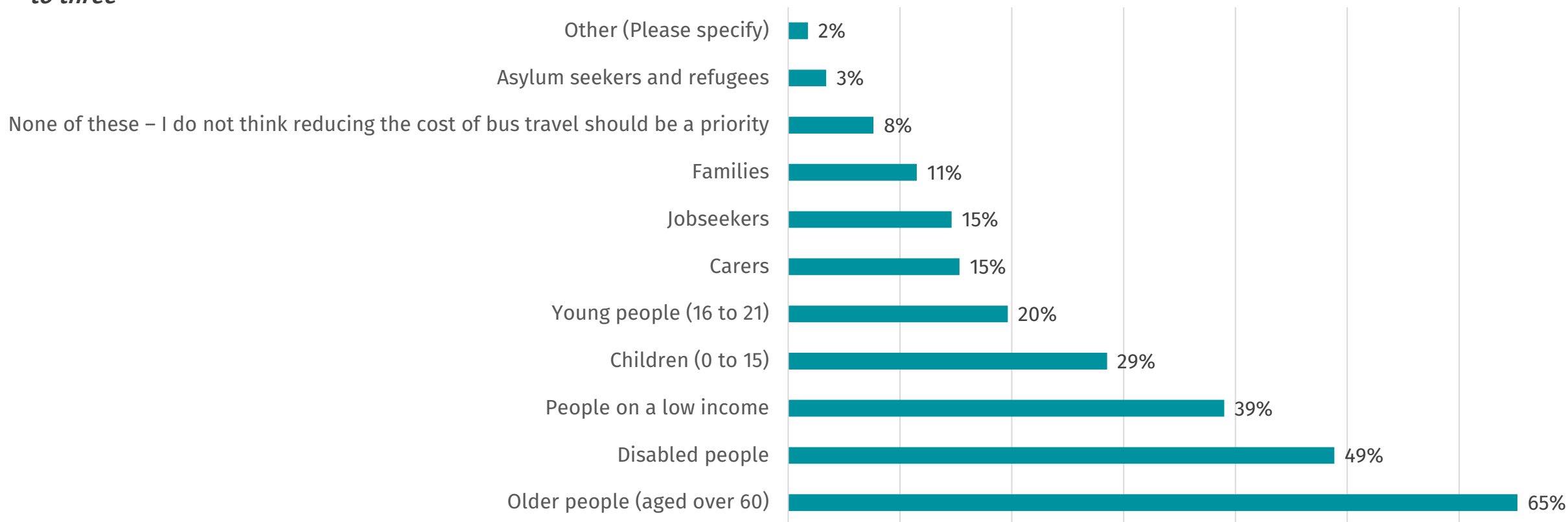
Question: Which of the following do you think should be a priority for those responsible for setting bus fares within the United Kingdom?

Legend: Keeping the cost of bus travel low for everyone | Providing cheaper or free bus travel for groups who need it most | Don't know

	All	18-24	25-34	35-44	45-54	55-64	65-74	75+
Keeping cost low	60%	49%	62%	62%	63%	59%	63%	56%
Providing cheaper/free	33%	38%	30%	31%	28%	33%	36%	42%
Don't know	7%	14%	8%	7%	9%	8%	1%	2%

WHEN CONCESSIONARY BUS FARES ARE PROVIDED, OLDER PEOPLE ARE SEEN AS THE HIGHEST PRIORITY

FIGURE 31: Two-thirds (65 per cent) think older people are a priority for free or discounted bus travel, half say disabled people (49 per cent) and four in 10 (39 per cent) say those on low incomes

Question: And if the government were to provide cheaper or free bus travel for certain groups, who should be the top priority? Select up to three
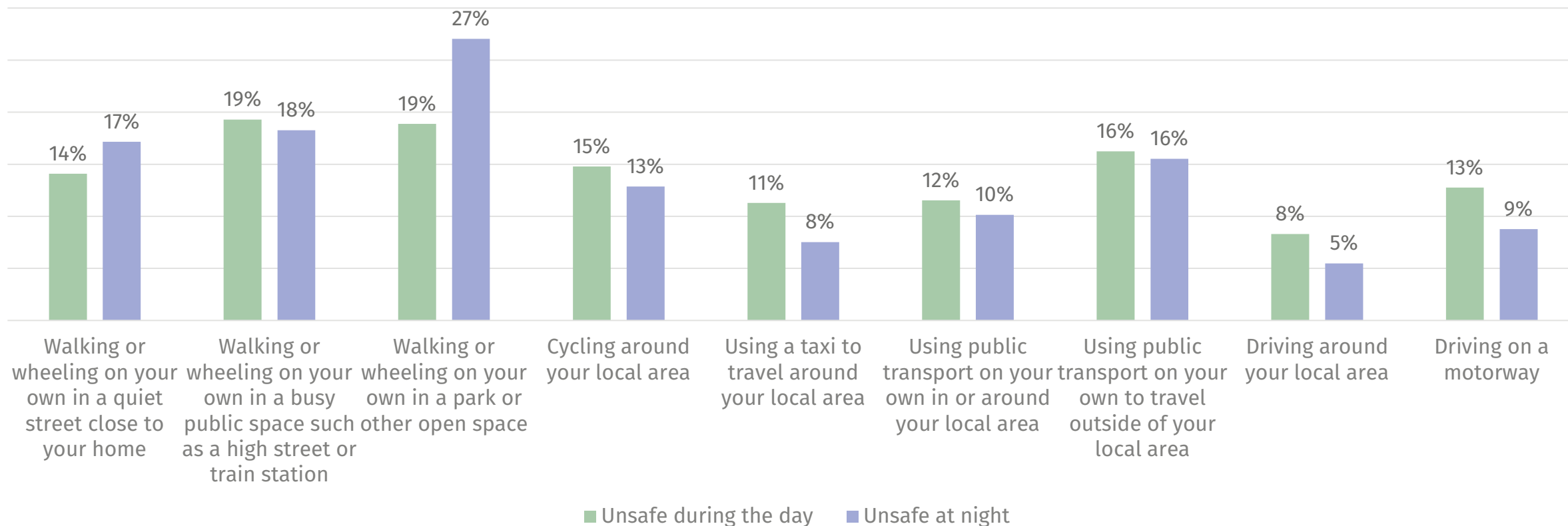
Group	Percentage
Other (Please specify)	2%
Asylum seekers and refugees	3%
None of these – I do not think reducing the cost of bus travel should be a priority	8%
Families	11%
Jobseekers	15%
Carers	15%
Young people (16 to 21)	20%
Children (0 to 15)	29%
People on a low income	39%
Disabled people	49%
Older people (aged over 60)	65%

6. TRANSPORT SAFETY

PEOPLE ARE MOST LIKELY TO FEEL UNSAFE ON JOURNEYS THAT TAKE PLACE ON FOOT OR IN A WHEELCHAIR

FIGURE 32: Few people feel unsafe driving in their local area but one in five (19 per cent) feel unsafe walking or wheeling on their own in a park, rising to over ONE-quarter (27 per cent) at night

Questions: 1) Thinking about your own personal safety, how safe or unsafe would you feel doing the following during the day? 2) Thinking about your own personal safety, how safe or unsafe would you feel doing the following at nighttime, ie after dark? Split sample

	Walking or wheeling on your own in a quiet street close to your home	Walking or wheeling on your own in a busy public space such as a high street or train station	Walking or wheeling on your own in a park or other open space	Cycling around your local area	Using a taxi to travel around your local area	Using public transport on your own in or around your local area	Using public transport on your own to travel outside of your local area	Driving around your local area	Driving on a motorway
Unsafe during the day	14%	19%	19%	15%	11%	12%	16%	8%	13%
Unsafe at night	17%	18%	27%	13%	8%	10%	16%	5%	9%

WOMEN AND DISABLED PEOPLE ARE MORE LIKELY TO FEEL UNSAFE WHILE TRAVELLING

FIGURE 33: One-fifth (22 per cent) of women and disabled people feel unsafe travelling on their own on public transport compared to one in ten (11 per cent) of men and one in seven (17 per cent) people without a disability

Questions: 1) Thinking about your own personal safety, how safe or unsafe would you feel doing the following during the day? 2) Thinking about your own personal safety, how safe or unsafe would you feel doing the following at nighttime ie after dark? Split sample

	Unsafe during the day				Unsafe at night			
	Male	Female	Disability or health condition	No known disability or health condition	Male	Female	Disability or health condition	No known disability or health condition
Walking or wheeling on your own in a quiet street close to your home	11%	17%	17%	12%	10%	23%	24%	12%
Walking or wheeling on your own in a busy public space such as a high street or train station	19%	20%	21%	18%	13%	23%	24%	14%
Walking or wheeling on your own in a park or other open space	15%	23%	22%	17%	19%	34%	35%	21%
Cycling around your local area	14%	16%	16%	14%	9%	16%	15%	11%
Using a taxi to travel around your local area	11%	12%	14%	9%	6%	9%	11%	5%
Using public transport on your own in or around your local area	12%	11%	13%	11%	6%	14%	13%	8%
Using public transport on your own to travel outside of your local area	11%	22%	22%	13%	10%	20%	18%	14%
Driving around your local area	9%	8%	9%	8%	6%	5%	6%	5%
Driving on a motorway	11%	14%	12%	13%	7%	10%	12%	7%

MANY FEEL CONCERNED ABOUT VIOLENCE, HARRASSMENT AND DISCRIMINATION ON PUBLIC TRANSPORT

FIGURE 34: Half of Britons are concerned about the risk of violence (51 per cent) and harassment (50 per cent) with almost one-third (31 per cent) concerned about discrimination, with this rising significantly for certain groups
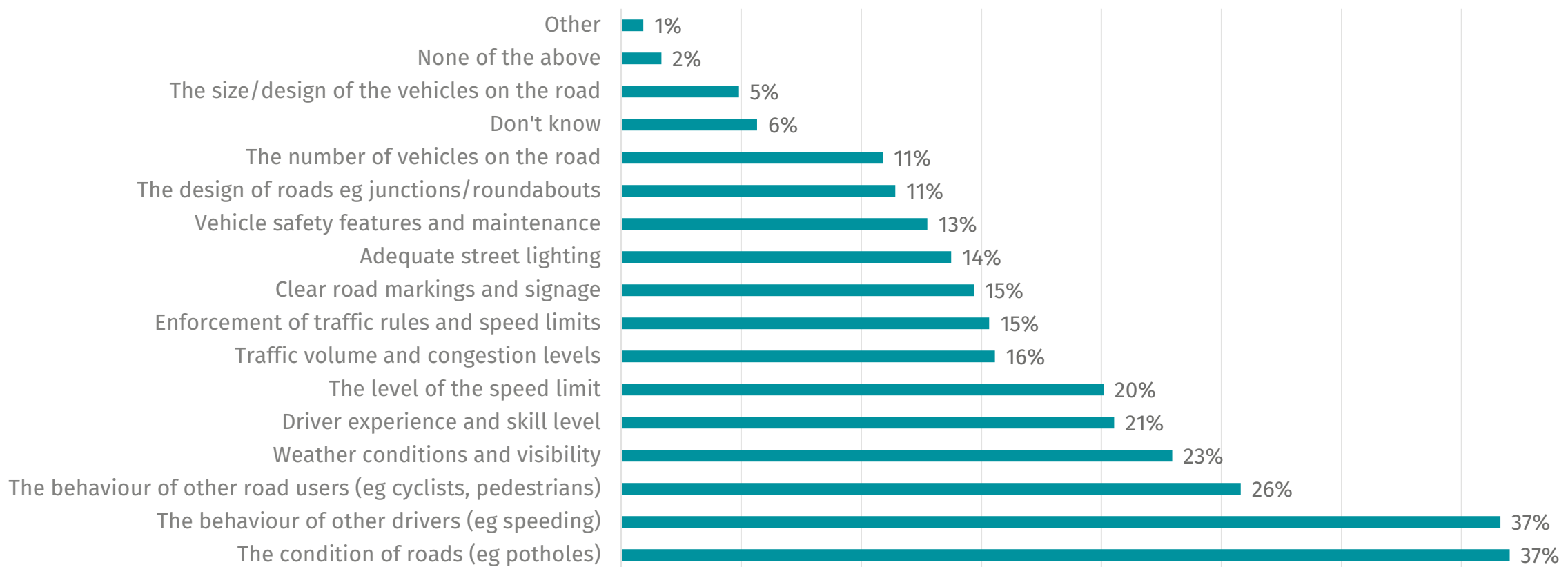
Questions: Thinking about a typical journey, how concerned, if at all, would you be about the following when travelling by public transport?

Risk of discrimination · Risk of harassment · Risk of violence
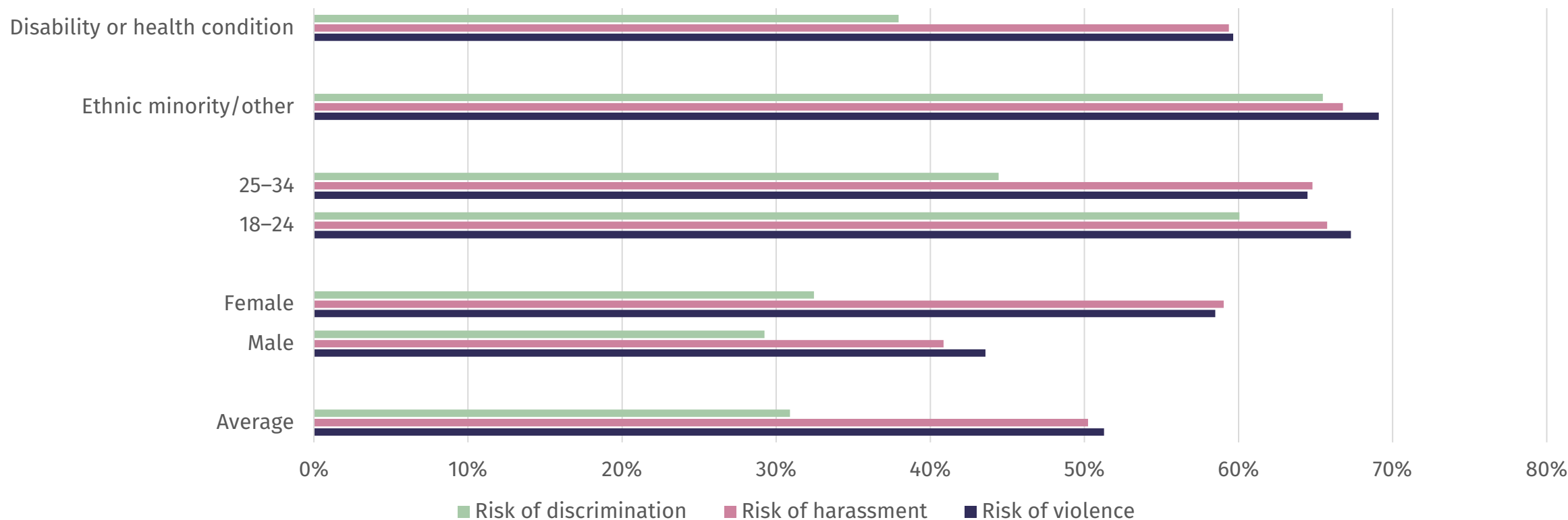
POTHOLES AND OTHER DRIVERS SEEN AS MOST IMPORTANT FACTORS FOR SAFETY WHILE IN A VEHICLE

FIGURE 35: Almost four in 10 (37 per cent) see the condition of roads and the behaviour of other drivers as the most important factor for safety when they are in a vehicle
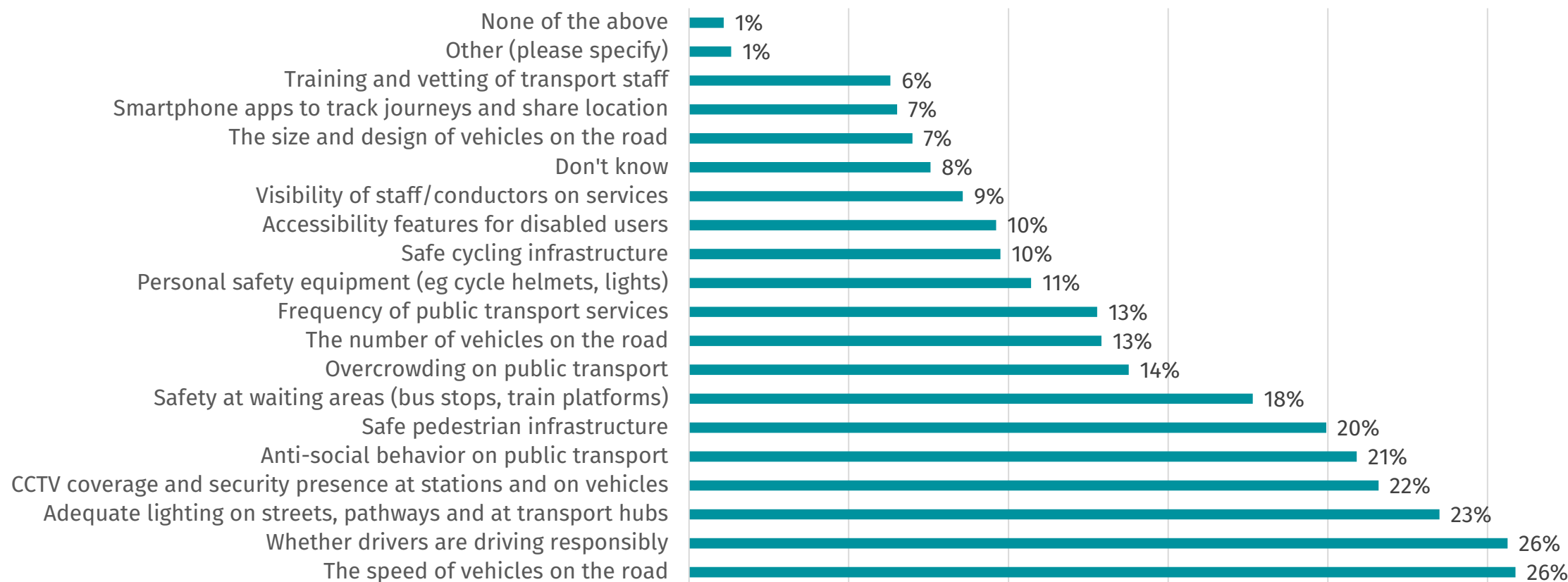
Question: Thinking about journeys where you are driving or travelling as a passenger in a vehicle, which factors do you believe are most important in determining how safe a journey is? Select up to three options. Split sample

Factor	Percentage
Other	1%
None of the above	2%
The size/design of the vehicles on the road	5%
Don't know	6%
The number of vehicles on the road	11%
The design of roads eg junctions/roundabouts	11%
Vehicle safety features and maintenance	13%
Adequate street lighting	14%
Clear road markings and signage	15%
Enforcement of traffic rules and speed limits	15%
Traffic volume and congestion levels	16%
The level of the speed limit	20%
Driver experience and skill level	21%
Weather conditions and visibility	23%
The behaviour of other road users (eg cyclists, pedestrians)	26%
The behaviour of other drivers (eg speeding)	37%
The condition of roads (eg potholes)	37%

VEHICLE SPEEDS AND DRIVER BEHAVIOUR SEES AS MAIN FACTOR IN SAFETY OF PUBLIC AND ACTIVE JOURNEYS

FIGURE 36: One-quarter (26 per cent) see vehicle speeds and whether drivers are driving responsibly as key safety factors for journeys made using public transport, walking, using a wheelchair or cycling
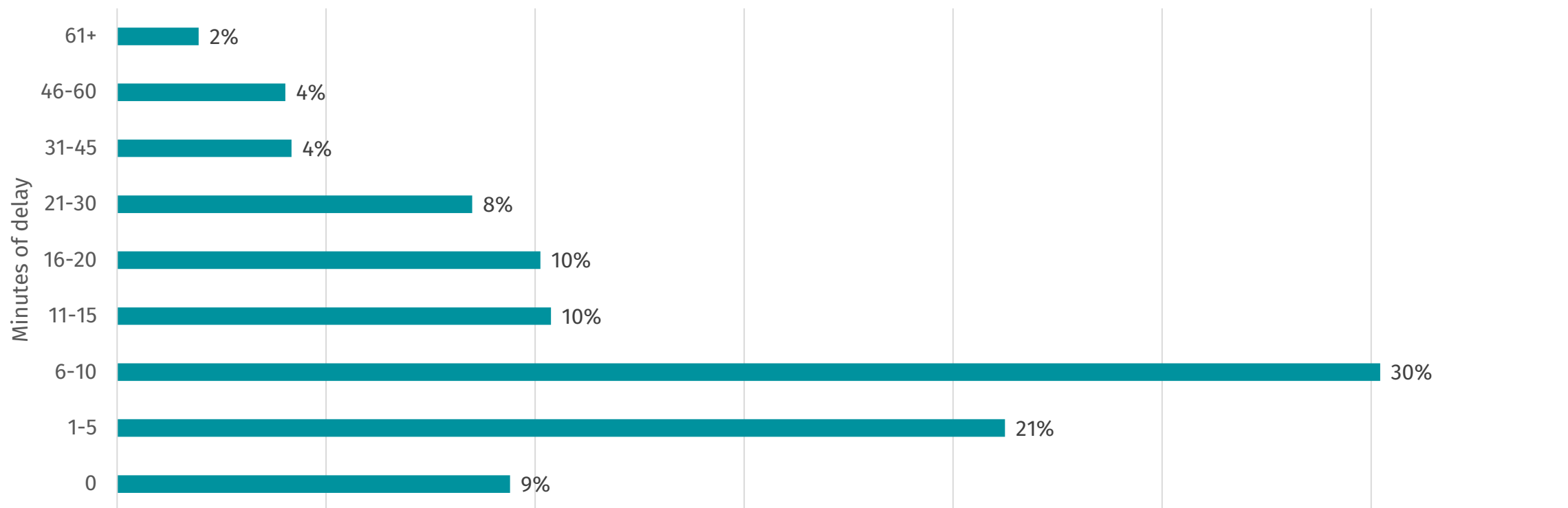
Question: Which of the below factors do you think are most important for determining the safety of a journey using public transport, walking, using a wheelchair or cycling? Select up to three options. Split sample

Factor	Percentage
None of the above	1%
Other (please specify)	1%
Training and vetting of transport staff	6%
Smartphone apps to track journeys and share location	7%
The size and design of vehicles on the road	7%
Don't know	8%
Visibility of staff/conductors on services	9%
Accessibility features for disabled users	10%
Safe cycling infrastructure	10%
Personal safety equipment (eg cycle helmets, lights)	11%
Frequency of public transport services	13%
The number of vehicles on the road	13%
Overcrowding on public transport	14%
Safety at waiting areas (bus stops, train platforms)	18%
Safe pedestrian infrastructure	20%
Anti-social behavior on public transport	21%
CCTV coverage and security presence at stations and on vehicles	22%
Adequate lighting on streets, pathways and at transport hubs	23%
Whether drivers are driving responsibly	26%
The speed of vehicles on the road	26%

MOST PEOPLE WOULD BE WILLING TO INCUR A DELAY TO THEIR JOURNEYS TO MAKE ROADS SAFER

FIGURE 37: Less than one in 10 (9 per cent) would not be willing to delay their journeys to make roads safer whereas four in 10 (39 per cent) say they would accept a delay of over 10 minutes on a half hour journey

Question: Lowering speed limits can help make roads safer and help save lives but it can also make some journeys take longer for some people. Thinking about a standard journey you might make by car, of around half an hour, if the speed limit was lowered on this route, for example from 30 MPH to 20 MPH, how large a delay, if at all, would you be willing to incur if you knew it made roads safer?

Horizontal bar chart. Y-axis labelled "Minutes of delay".

Minutes of delay	Percentage
61+	2%
46-60	4%
31-45	4%
21-30	8%
16-20	10%
11-15	10%
6-10	30%
1-5	21%
0	9%

PEOPLE SAY THEY WOULD BE WILLING TO ACCEPT A SIGNIGICANT DELAY FOR SAFER ROADS

FIGURE 38: On average people say they would be willing to accept a 15-minute delay on a half hour journey, with this varying little between segments

Question: Lowering speed limits can help make roads safer and help save lives but it can also make some journeys take longer for some people. Thinking about a standard journey you might make by car, of around half an hour, if the speed limit was lowered on this route, for example from 30 MPH to 20 MPH, how large a delay, if at all, would you be willing to incur if you knew it made roads safer?

Segment	Minutes of delay
Backbone conservatives	14.9
Disengaged traditionalists	17.2
Loyal nationals	15.6
Established liberals	17.7
Disengaged battlers	13.3
Civic pragmatists	12.2
Progressive activists	17.2
All	15.5

Minutes of delay
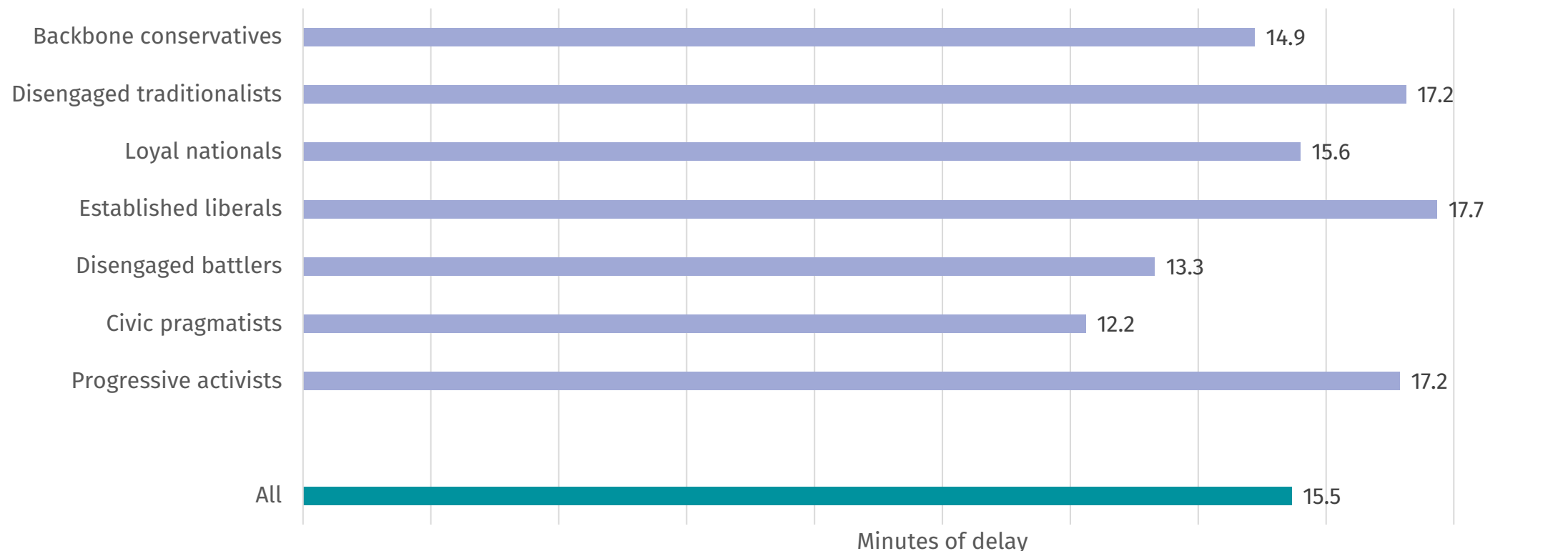
EVEN THE MOST REGULAR DRIVERS WOULD BE WILLING TO DELAY THEIR CAR JOURNEYS FOR SAFER ROADS

FIGURE 39: Almost nine in 10 (87 per cent) of daily drivers would be willing to delay a car journey if they knew it would make roads safer

Question: Lowering speed limits can help make roads safer and help save lives but it can also make some journeys take longer for some people. Thinking about a standard journey you might make by car, of around half an hour, if the speed limit was lowered on this route, for example from 30 MPH to 20 MPH, how large a delay, if at all, would you be willing to incur if you knew it made roads safer?

Legend: 1-5, 6-10, 11-15, 16-20, 21-30, 31-45, 46-60, 61+
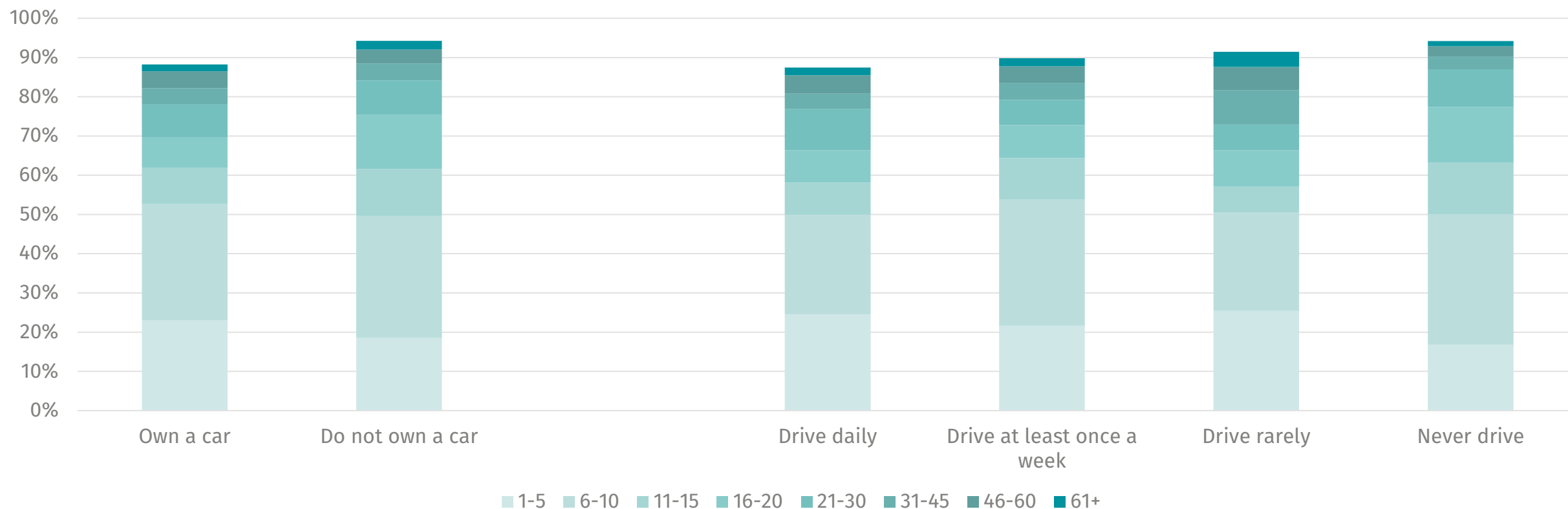
THERE IS SUPPORT FOR A RANGE OF SAFETY MEASURES, PARTICULARLY THOSE FOCUSSED ON SAFETY OF PEDESTRIANS

FIGURE 40: Increasing the number of staff on public transport, creating school streets, restricting parking on busy streets and pedestrian crossings score highly on effectiveness and public support

Questions: 1) For each of the following potential policies, please indicate whether you think their introduction would make transport in your local area safer or more dangerous. 2) To what extent would you support or oppose the following policies being introduced to improve transport safety in your local area. Split sample. Net calculated by subtracting negative sentiment from positive
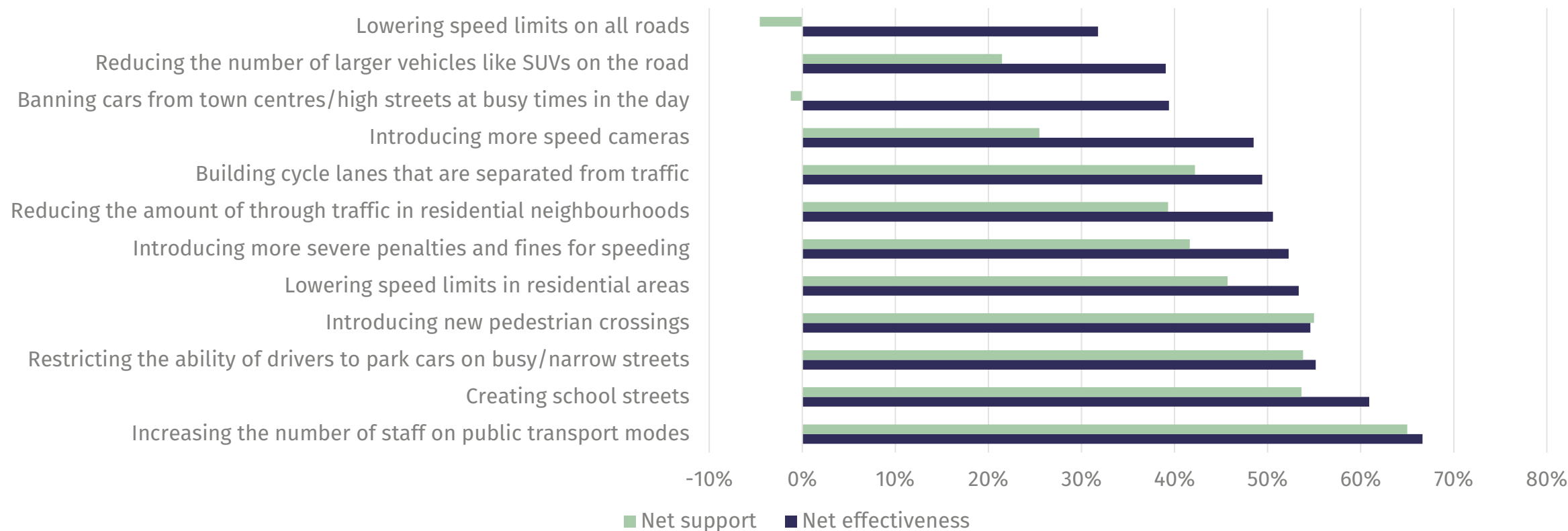
THE MAJORITY OF THE PUBLIC SUPPORT A GOAL OF ZERO DEATHS AND SERIOUS INJURIES ON THE ROAD BY 2040

FIGURE 41: Over half (56 per cent) support targeting zero road deaths and progressive voters highly supportive (69 per cent)

Question: To what extent would you support or oppose the UK government establishing a target to have zero fatalities or serious injuries on Britain's roads by 2040? Split sample

Legend: Strongly support | Somewhat support | Neither support nor oppose | Don't know | Somewhat oppose | Strongly oppose
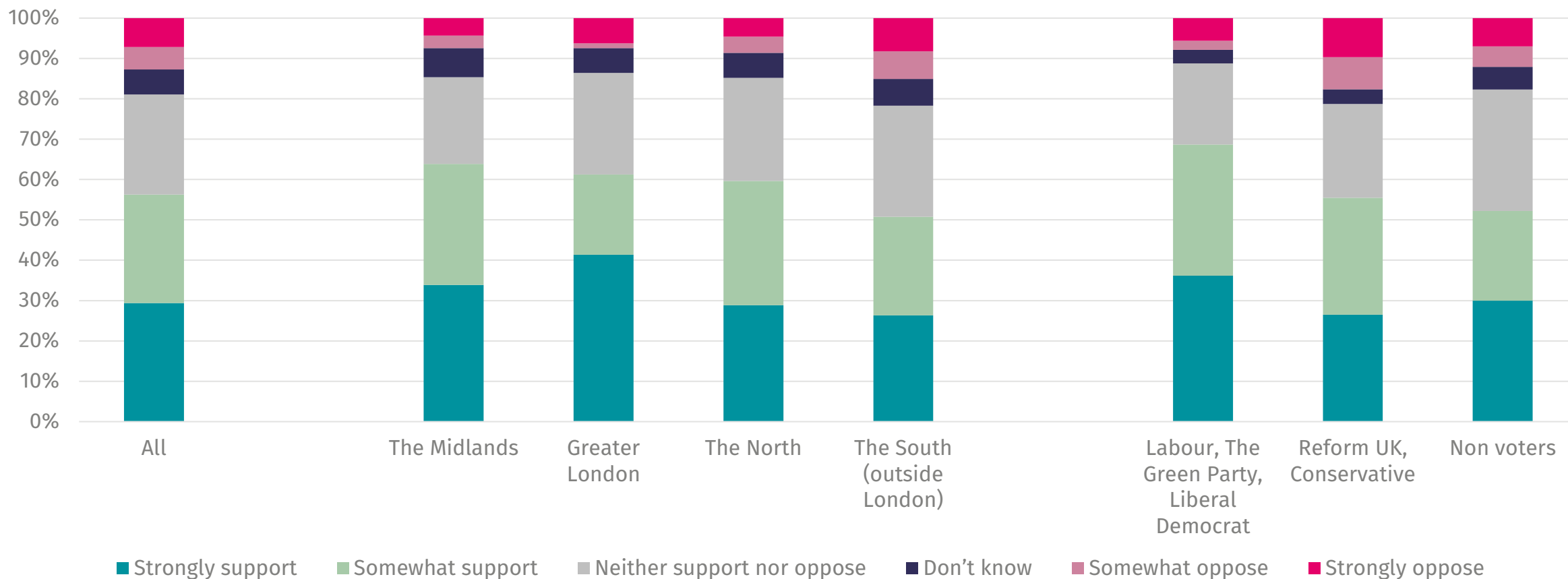
MOST BELIEVE ACHIEVING ZERO ROAD DEATHS OR SERIOUS INJURIES BY 2040 IS UNLIKELY

FIGURE 42: Two-thirds (65 per cent) think its unlikely the government would achieve zero roads deaths or serious injuries, with progressive voters most likely to see it as likely (24 per cent)

Question: If the UK government was to set itself a target of having zero fatalities or serious injuries on Britain's roads by 2040, how likely or unlikely do you think it would be to achieve this objective? Split sample
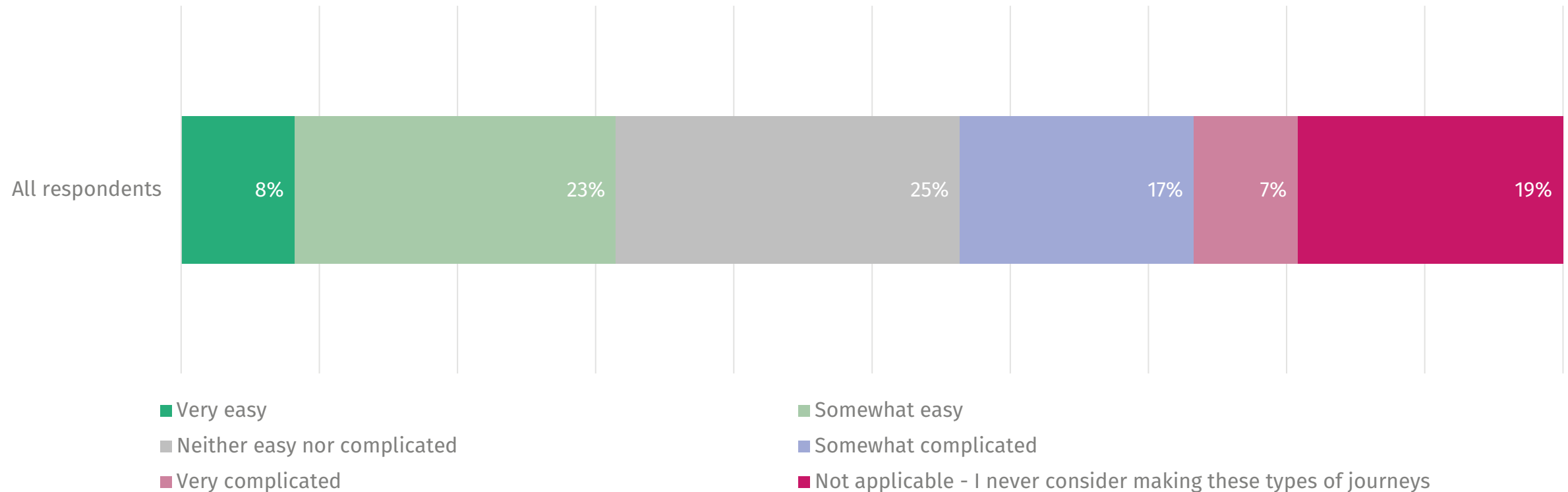

Legend: ■ Very likely ■ Somewhat likely ■ Neither likely nor unlikely ■ Somewhat unlikely ■ Very unlikely
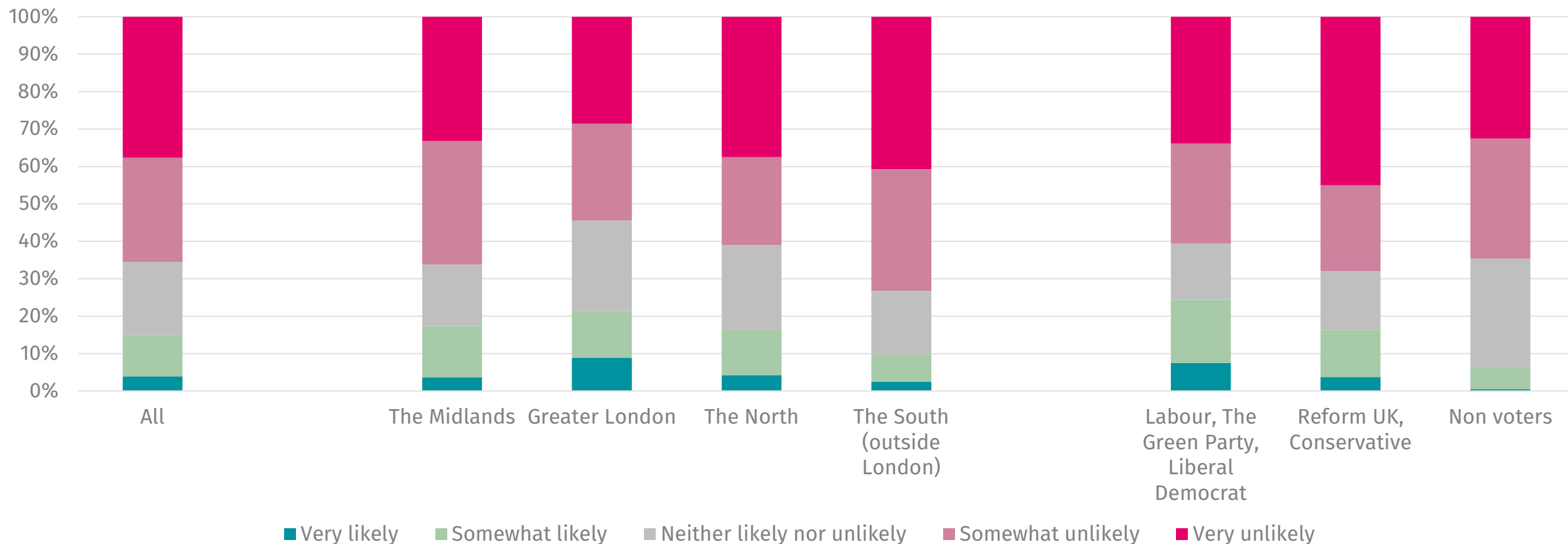
7. TOWARDS MORE INTEGRATED TRANSPORT

THE MAJORITY OF PEOPLE EITHER DON'T UNDERTAKE MULTIMODAL JOURNEYS OR FIND THEM COMPLICATED

FIGURE 43: One-fifth (19 per cent) of people don't consider making multimodal journeys and one-quarter (24 per cent) find them complicate
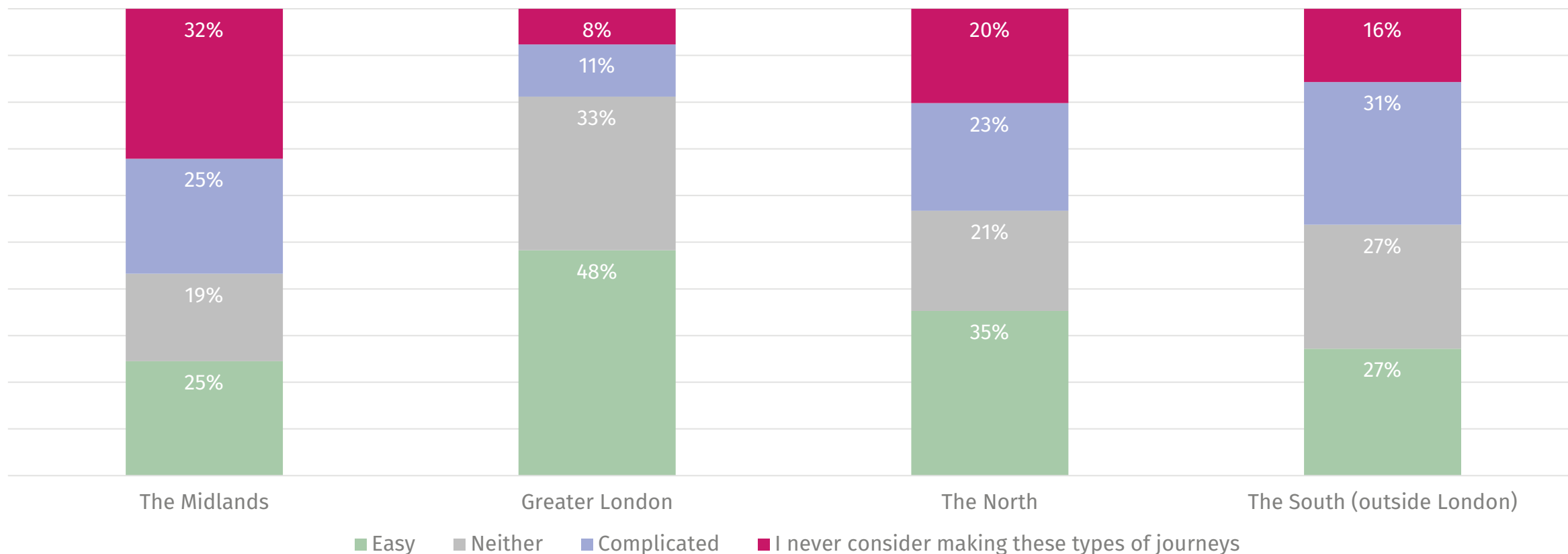
Question: Thinking about journeys that require the use of different transport modes, for example journeys where you use both the train and a bus, how complicated or easy do you find it to make these types of journeys?

All respondents: 8% | 23% | 25% | 17% | 7% | 19%

- ■ Very easy
- ■ Somewhat easy
- ■ Neither easy nor complicated
- ■ Somewhat complicated
- ■ Very complicated
- ■ Not applicable - I never consider making these types of journeys

MULTIMODAL JOURNEYS ARE EASIER AND MORE COMMON IN URBAN AREAS

FIGURE 44: Few don't consider making multimodal journeys in urban areas (just 11 per cent) with this rising to one-quarter (26 per cent) of those living in rural areas
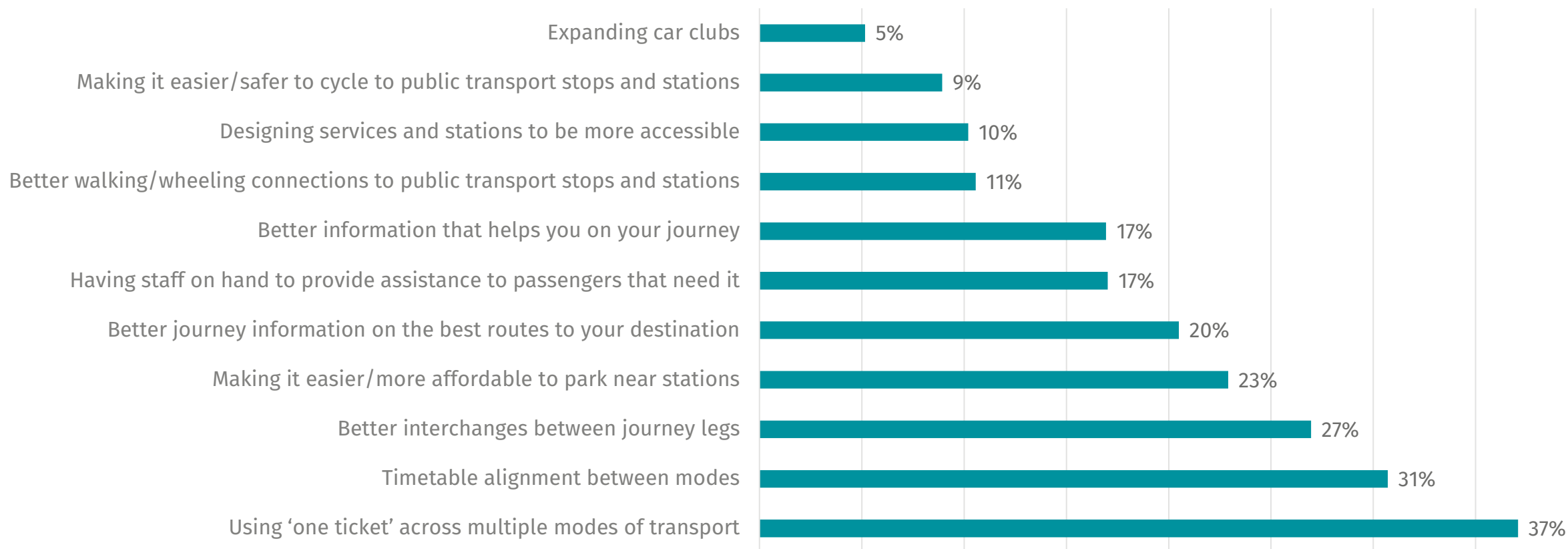
Question: Thinking about journeys that require the use of different transport modes, for example journeys where you use both the train and a bus, how complicated or easy do you find it to make these types of journeys?

	Village/rural area	Small town	Large town	Suburbs	Urban/city centre
I never consider making these types of journeys	26%	20%	18%	22%	11%
Complicated	33%	28%	28%	18%	16%
Neither	15%	28%	25%	25%	29%
Easy	25%	23%	29%	34%	45%

Legend: Easy · Neither · Complicated · I never consider making these types of journeys

MULTIMODAL JOURNEYS ARE LESS COMMON AND MORE COMPLICATED IN SOME REGIONS

FIGURE 45: Many more Londoners find multimodal journeys 'easy' compared to those living in other regions (48 per cent compared to 25 per cent in the Midlands)

Question: Thinking about journeys that require the use of different transport modes, for example journeys where you use both the train and a bus, how complicated or easy do you find it to make these types of journeys?

	The Midlands	Greater London	The North	The South (outside London)
I never consider making these types of journeys	32%	8%	20%	16%
Complicated	25%	11%	23%	31%
Neither	19%	33%	21%	27%
Easy	25%	48%	35%	27%

Legend: Easy, Neither, Complicated, I never consider making these types of journeys

INTEGRATED TICKETING IS SEEN AS THE BEST WAY OF BETTER JOINING UP TRANSPORT MODES

FIGURE 46: Over one-third (37 per cent) say 'one ticket' across modes would make multimodal journeys better, with around three in 10 saying timetable alignment (31 per cent) and better interchanges (27 per cent) are a priority

Question: In your opinion how best could the transport network be better 'joined-up' to make these multi-modal or multi-leg journeys better? Select up to two


Category	Percentage
Expanding car clubs	5%
Making it easier/safer to cycle to public transport stops and stations	9%
Designing services and stations to be more accessible	10%
Better walking/wheeling connections to public transport stops and stations	11%
Better information that helps you on your journey	17%
Having staff on hand to provide assistance to passengers that need it	17%
Better journey information on the best routes to your destination	20%
Making it easier/more affordable to park near stations	23%
Better interchanges between journey legs	27%
Timetable alignment between modes	31%
Using 'one ticket' across multiple modes of transport	37%

8. SECURING POLICY SUPPORT

THERE IS PUBLIC SUPPORT FOR A RANGE OF NEW CHARGES TO FUND LOCAL TRANSPORT

FIGURE 47: There is net support for new charges on property developers (+44 per cent), an emission charge on high polluting cars (12 per cent), a visitor levy (10 per cent), a transport levy (8 per cent) and higher parking fees for larger cars (3 per cent)
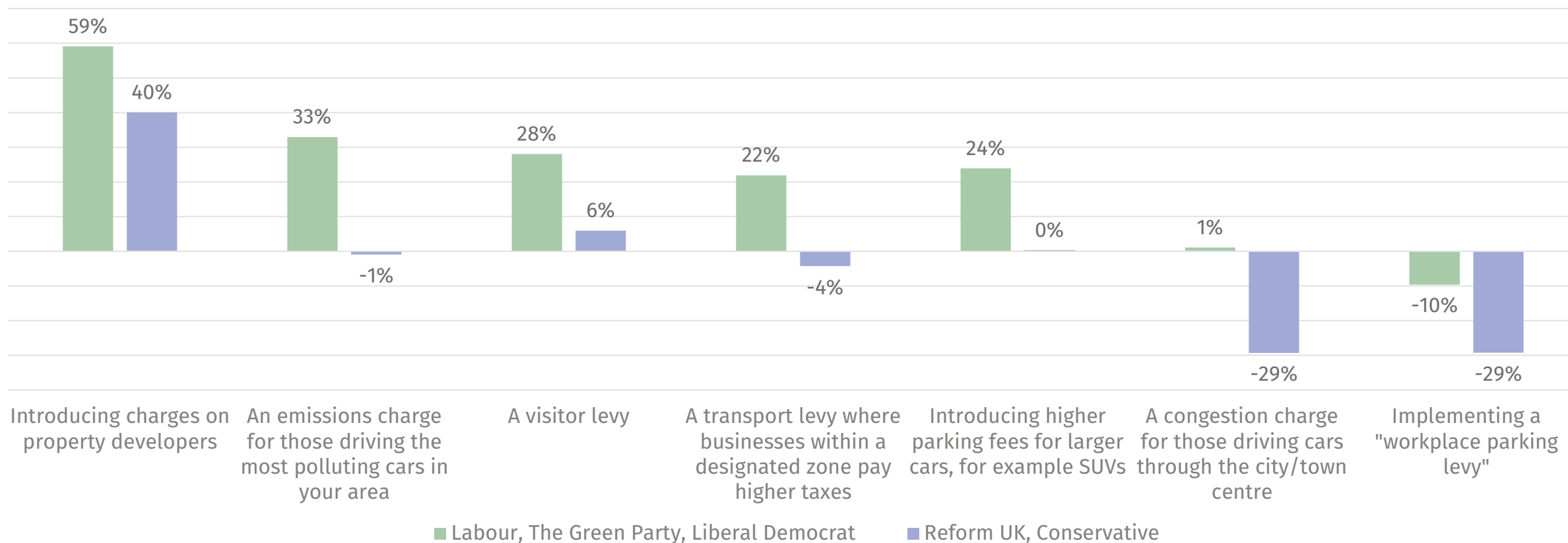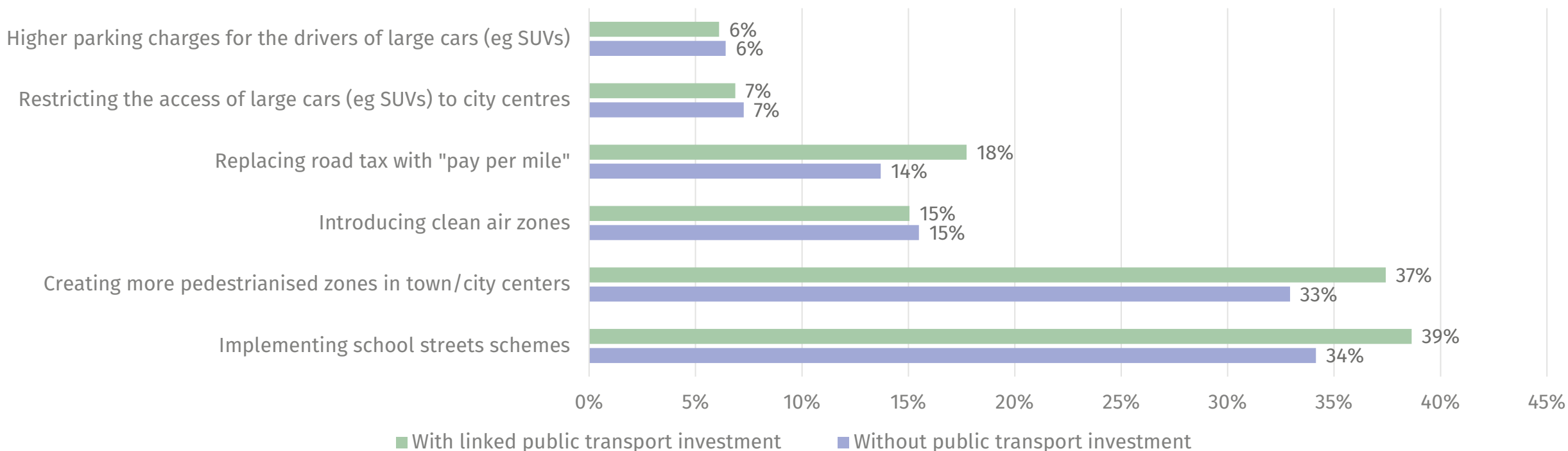
Question: To what extent would you support or oppose the following potential taxes and levies being introduced by your local council or metro mayor to fund transport improvements in your local area. Net calculated as support minus opposition
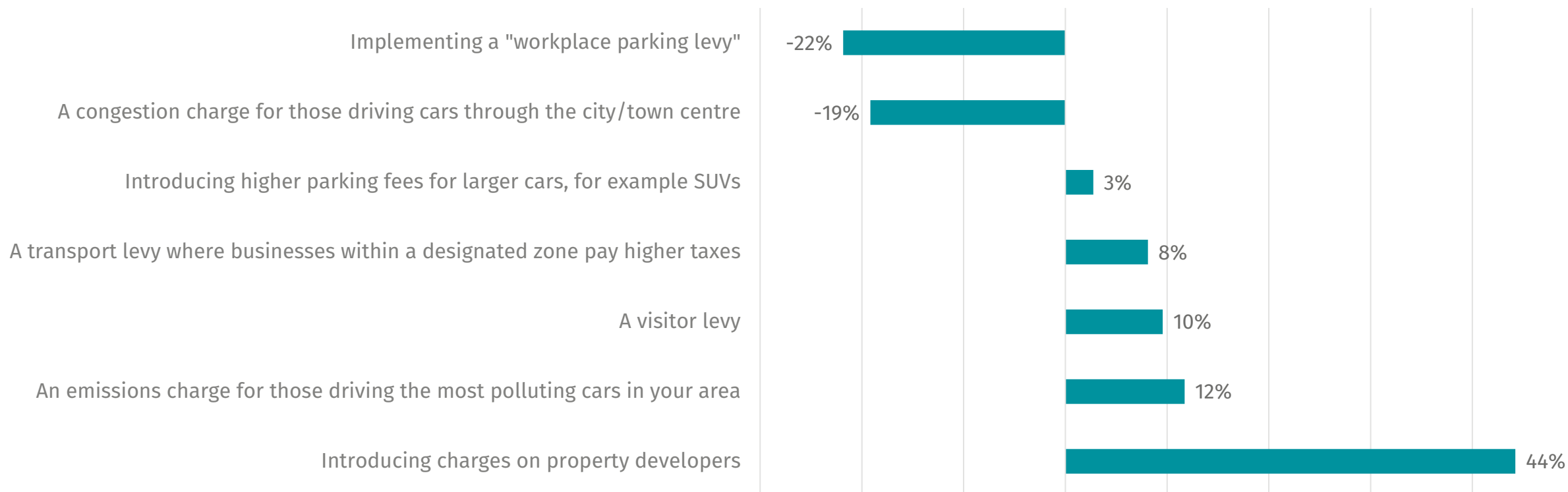
SUPPORT FOR NEW CHARGES IS HIGHER AMONGST PROGRESSIVE VOTERS

FIGURE 48: Progressive voters are supportive of the widest range of new levies, whereas Reform and Conservative voters are most likely to support charges on property developers (net +40 per cent) and a visitor levy (+6 per cent)

Question: To what extent would you support or oppose the following potential taxes and levies being introduced by your local council or metro mayor to fund transport improvements in your local area. Net calculated as support minus opposition

	Labour, The Green Party, Liberal Democrat	Reform UK, Conservative
Introducing charges on property developers	59%	40%
An emissions charge for those driving the most polluting cars in your area	33%	-1%
A visitor levy	28%	6%
A transport levy where businesses within a designated zone pay higher taxes	22%	-4%
Introducing higher parking fees for larger cars, for example SUVs	24%	0%
A congestion charge for those driving cars through the city/town centre	1%	-29%
Implementing a "workplace parking levy"	-10%	-29%

THERE IS SUPPORT FOR SOME EXPLICIT MODE SHIFT POLICIES

FIGURE 49: Schools streets (net +39 per cent), pedestrianised zones in town/city centres (37 per cent, 'pay per mile' road pricing also receiving (+18 per cent) and clean air zones (+15 per cent) receive the most support with or without increased investment in public transport
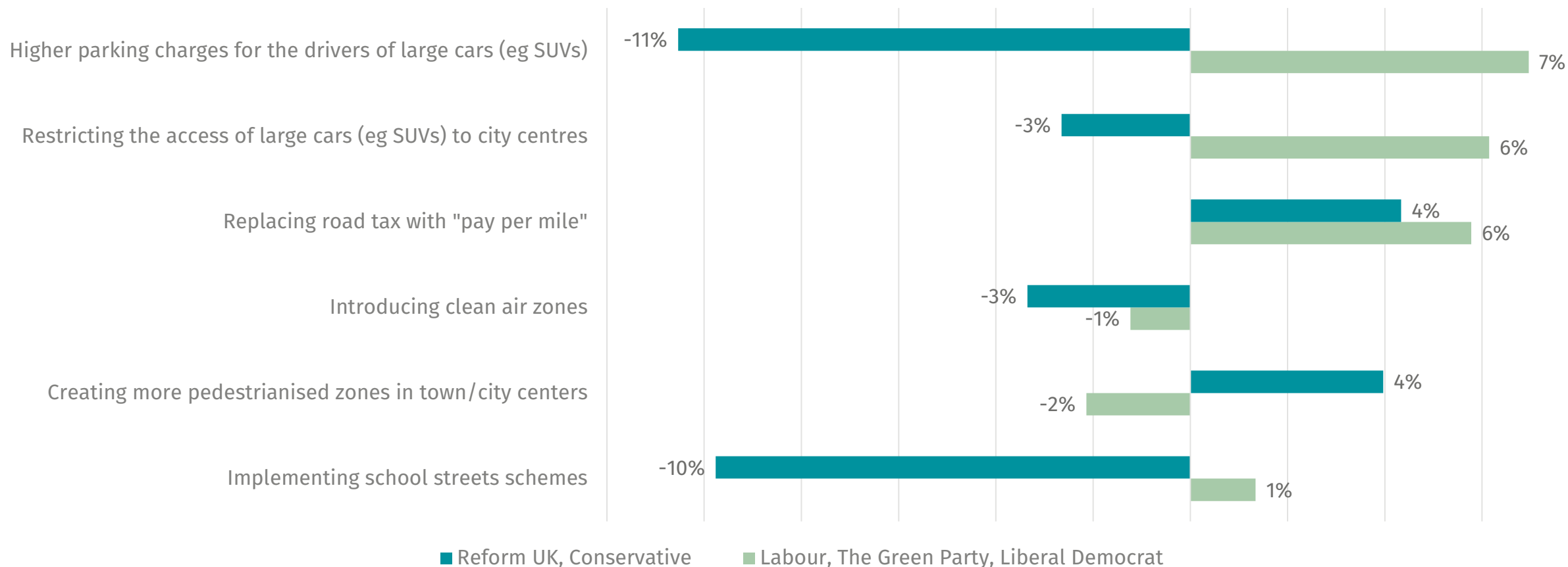
Questions: The government has an ambition to support more people to cycle, walk/wheel or use public transport instead of driving. 1) To what extent would you support or oppose the following policy measures? 2) Assuming they were accompanied by increased investment to boost the availability and affordability of public transport, to what extent would you support or oppose the following policy measures? Net calculated as support minus opposition

Policy	With linked public transport investment	Without public transport investment
Higher parking charges for the drivers of large cars (eg SUVs)	6%	6%
Restricting the access of large cars (eg SUVs) to city centres	7%	7%
Replacing road tax with "pay per mile"	18%	14%
Introducing clean air zones	15%	15%
Creating more pedestrianised zones in town/city centers	37%	33%
Implementing school streets schemes	39%	34%

■ With linked public transport investment   ■ Without public transport investment

LINKING CERTAIN POLICIES TO PUBLIC TRANSPORT INVESTMENT MAKES A BIG DIFFERENCE TO SOME VOTERS

FIGURE 50: Progressive voters show the biggest increases in support for mode shift policies when they are twinned with public transport investment, however this link can also lead a reduction in support with some voters

Change in net support for select policies when they are linked to new public transport investment, split by vote at the 2024 general election. Questions as described in figure 49

- Higher parking charges for the drivers of large cars (eg SUVs): -11%, 7%
- Restricting the access of large cars (eg SUVs) to city centres: -3%, 6%
- Replacing road tax with "pay per mile": 4%, 6%
- Introducing clean air zones: -3%, -1%
- Creating more pedestrianised zones in town/city centers: 4%, -2%
- Implementing school streets schemes: -10%, 1%

■ Reform UK, Conservative   ■ Labour, The Green Party, Liberal Democrat

WITHOUT ACCOMPANYING RATIONALE RESTRICTIONS ON DRIVING WILL FAIL TO ATTRACT SUPPORT

FIGURE 51: With no clear objective in place people are likely to not support restrictions on car access (net -16 per cent) and see them as not fair (-31 per cent support)

Net sentiment for policy support, estimated community support, effectiveness, fairness and personal acceptability of driving restrictions on certain roads at certain times
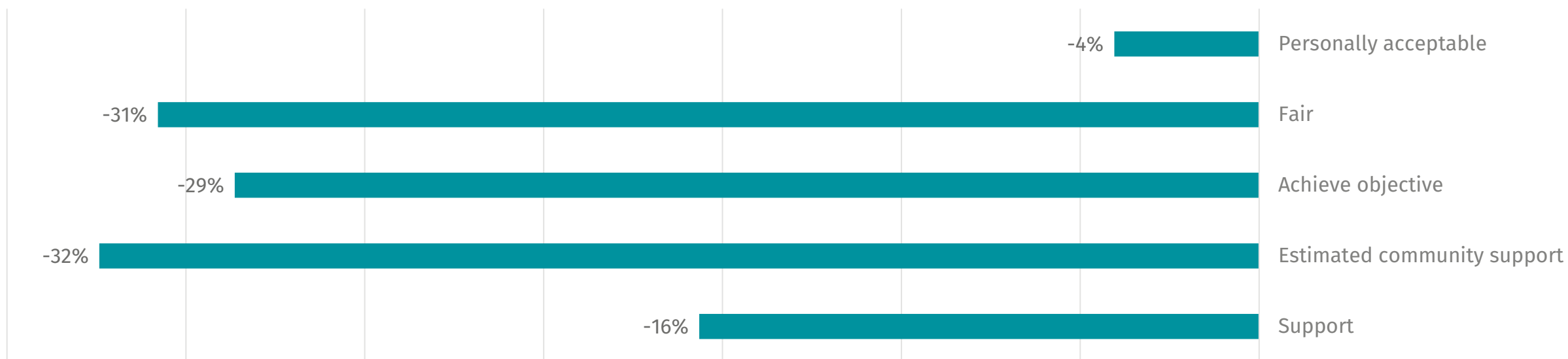

Questions: Imagine your local council is planning a new scheme that would prevent cars being driven on certain roads in your area during specific time periods. 1) Would you support or oppose the introduction of this scheme? 2) Do you think other members of your local community would support or oppose the introduction of this scheme? 3) How likely do you think the council would be to achieve its objective if it implemented this scheme? Implementing a scheme like this would impact how some people in your area can get around by car. Do you think this would be fair or unfair? 4) If implementing a scheme like this would result in some inconvenience to your current travel routines, how acceptable would you find this? Results are net of positive minus negative sentiment. Split sample

AIR POLLUTION FRAMING GENERATES THE MOST SUPPORT, LIKELY LINKED TO ITS IMPACT ON PERCEIVED FAIRNESS

FIGURE 52: Linking restrictions on driving to reducing air pollution sees the intervention as being perceived as fair (net +6 per cent) and personally acceptable (+4 per cent) and creates the opportunity to build more policy support (net 0 per cent)

Net sentiment for policy support, estimated community support, effectiveness, fairness and personal acceptability of driving restrictions on certain roads at certain times after the introduction of different frames
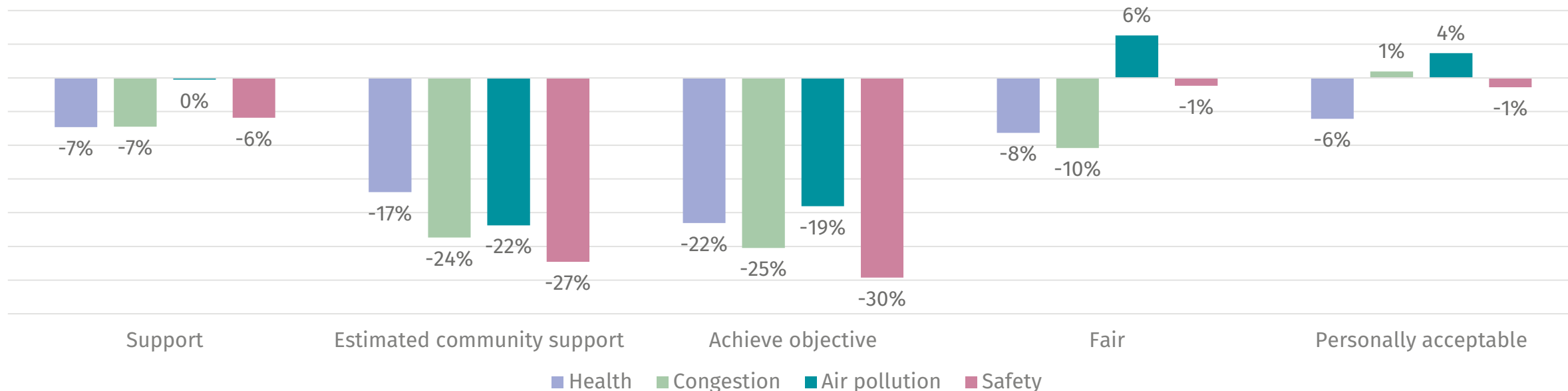
Questions: As previous Fig 51 with additional introductory text explaining rationale for the intervention. Health frame: The council believes this will help promote healthier transport options like walking and cycling, improving the health and wellbeing of local residents. Congestion Frame: The council believes this will help reduce traffic congestion in peak hours, making journeys faster and more predictable. Air pollution Frame: The council believes this will reduce air pollution, allowing local residents to breathe in cleaner air and have a cleaner environment to live in. Safety Frame: The council believes this will reduce road collisions, making the streets safer for local residents and protecting children from harm whilst walking and playing. Split sample.

SUPPORT FOR PUBLIC TRANSPORT INVESTMENT IS SIGNIFICANT BUT NOT UNCONDITIONAL

FIGURE 53: Support for public transport improvements is high (net +27 per cent) even if it may mean less funding is available for other priorities but this does not translate to believing the government will achieve is objectives (net -13 per cent) and mixed views on how acceptable the trade offs with other public services are (-4 per cent) nor mean there is support for paying higher taxes to fund it (-34 per cent)

Net sentiment for policy support, estimated community support, effectiveness, fairness and personal acceptability of public transport investment if it took away from investment elsewhere
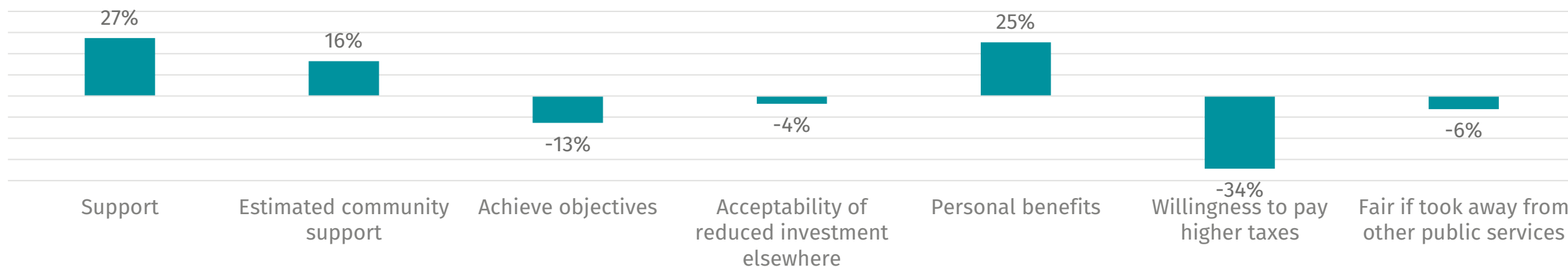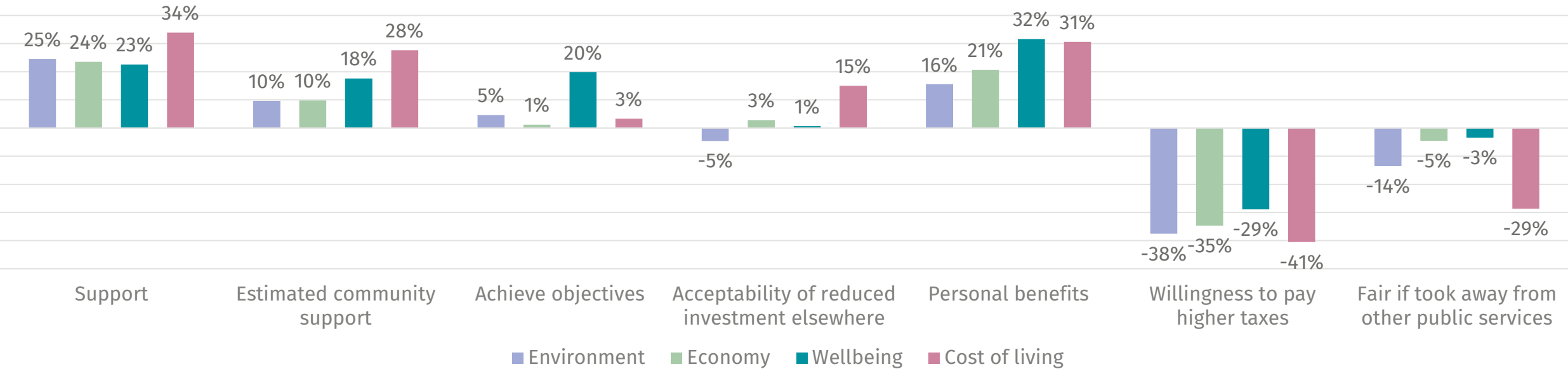

Questions: Imagine the government is considering making a major investment in improving public transport across your region, for example by creating new train lines and bus routes or increasing the frequency of buses. Funding this project would mean the government has less money available for other public spending priorities. 1) To what extent would you support or oppose this investment in public transport for your region? How likely do you think it would be for the government's investment in public transport to achieve its objective? 2) This investment would likely require the government to reduce the amount it invests in other public services, for example reducing the amount it invests in building new roads. How acceptable or unacceptable would you find this trade-off? 3) What do you think the impact of the government investing in these public transport improvements would be for you personally? 4) Would you be willing to pay slightly higher taxes, for example paying increased fuel duty, to help fund this investment in improving public transport in your region? To what extent would you think it would be fair or unfair if the government chose to make this investment in improving public transport in your region if it reduced their ability to invest in other types of public services? Split sample.

COST OF LIVING FRAMING BUILDS POLICY SUPPORT FOR PUBLIC TRANSPORT IMPROVEMENTS

FIGURE 54: Over one-third (net +34 per cent) support public transport improvements linked to reducing living costs, but this framing would still not lead to support for higher taxes (-41 per cent) and leads to increased concern about the impact on other public services (net -29 per cent)

Net sentiment for policy support, estimated community support, effectiveness, fairness and personal acceptability of public transport investment even if it took away from investment elsewhere after the introduction of different frames

	Environment	Economy	Wellbeing	Cost of living
Support	25%	24%	23%	34%
Estimated community support	10%	10%	18%	28%
Achieve objectives	5%	1%	20%	3%
Acceptability of reduced investment elsewhere	-5%	3%	1%	15%
Personal benefits	16%	21%	32%	31%
Willingness to pay higher taxes	-38%	-35%	-29%	-41%
Fair if took away from other public services	-14%	-5%	-3%	-29%

Questions: As previous slide with additional introductory text explaining rationale for the intervention. Environmental frame: This investment should reduce carbon emissions, helping to address climate change and create a more sustainable transport system. Economic frame: This investment should make it easier for everyone to use public transport to access employment opportunities, helping grow the economy. Wellbeing frame: This investment should create new transport routes, helping people to more easily visit friends and family and access leisure activities improving their health and wellbeing. Cost of living frame: This investment should reduce the cost of public transport journeys in your region, helping ease cost of living pressures. Split sample.
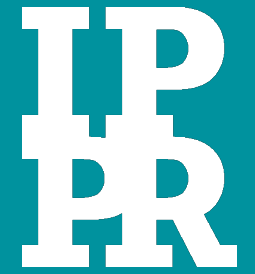
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