

# Trends in Modal shift:

## An analysis of the British Social Attitudes Survey

---

*Prepared by:*

*David Leibling  
July 2007*



## **Executive Summary**

This paper reviews data on transport usage from the British Social Attitudes surveys from 1993 to 2005 to determine whether there has been a shift in behaviour in modal use, both nationally and in London by considering the frequent users (use mode at least twice a week) or non-users (never use) of each mode.

The total number of people driving a car has risen steadily over the period, nationally and in London, with the proportion of frequent users rising nationally but showing some signs of slowing down in London. Frequency of travel as a car passenger has not changed over the period, any increase in demand possibly being offset by increased number of people driving themselves.

While the number of people who never use buses has risen outside London, there is evidence that the improvement in bus services in London has led to increased use by those who already use buses but those who never used a bus have not changed their behaviour. On the other hand, it seems that the increased usage of National Rail has come from infrequent users being more willing to consider trains for the occasional trip rather than more use by regular users. In London those who already use trains are using them more intensively.

There has been no perceptible change in walking and cycling behaviour.

## 1. The British Social Attitudes Survey (BSA)

The British Social Attitudes survey is the leading social research survey in Britain and has been run by the National Centre for Social Research since 1993.

Each year around 3,300 randomly selected adults are asked to give their views on an extensive range of topics in a face-to-face interview. New areas of questioning are added each year to reflect policy changes and current affairs, but all questions are designed with a view to repeating them periodically to chart changes over time.

Questions have been asked on a number of aspects of transport, often sponsored by the Department for Transport. The Centre for Comparative European Survey Data at the London Metropolitan University has the data available online and has helped with additional analysis for this report, focusing on Greater London. Their help and that of the staff at NatCen are gratefully acknowledged.

## 2. Trends in Modal shift

Since 1993 a series of questions has been asked on frequency of use of different modes of transport:

- Do you drive a car at all these days?
- How often nowadays do you usually travel by car as a driver? (drivers only)
- How often nowadays do you usually travel ...
  - *By car as a passenger?*
  - *By local bus?*
  - *By train?*
  - *By bicycle? (asked from 1993 to 2003 excluding 2000)*
- How often nowadays do you usually walk more than 15 minutes? (asked from 1995 to 2003 excluding 2000)

Around a third of the total sample (1,100) is asked the transport questions which means that variations of 5% or more are significant; the London sample is around 100-110 people and therefore the reliability is much lower.

Respondents are asked to estimate their frequency of use in the following categories:

- Daily/almost daily
- 2-5 days a week
- Once a week
- At least monthly
- Less often
- Never nowadays

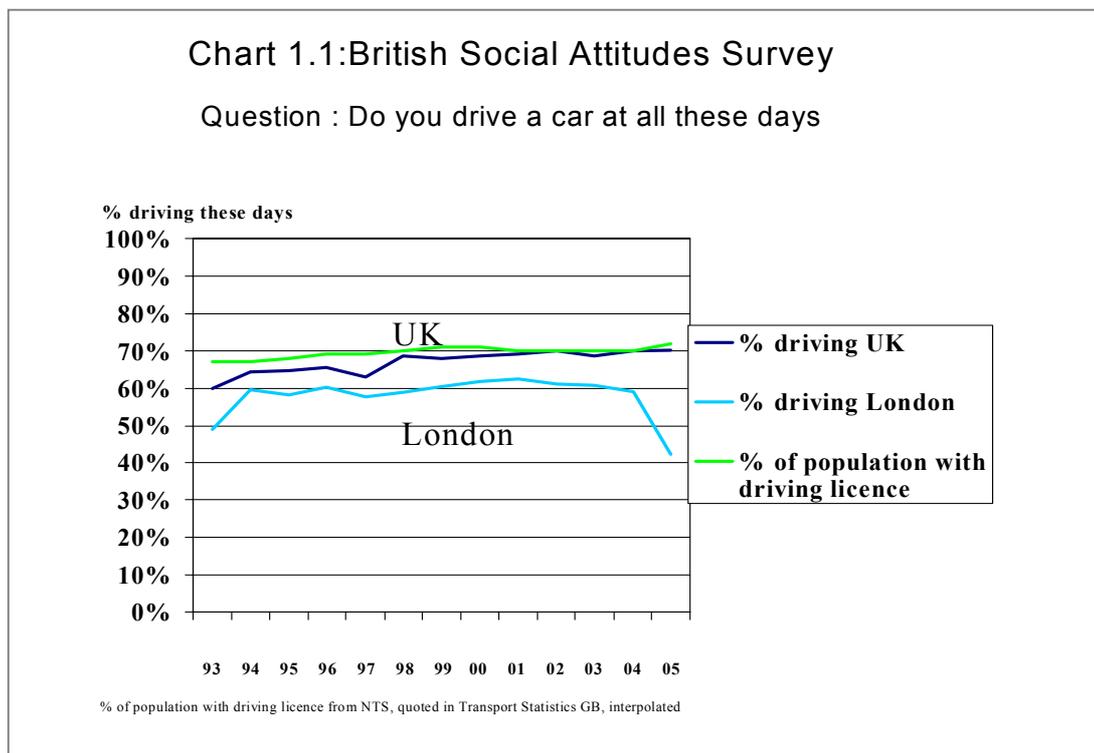
There is also a very small number of “don’t knows” or “no answers”. The first two categories have been combined to represent “frequent users” who are then compared with “never” as non-users.

The continuous trend of data from 1993 to 2005 covers a period of major policy shift by the Labour government from 1997 to encourage the use of public transport and reduce car usage. This is particularly true in London where there has been a considerable increase in public transport capacity and use since 2001 and where car usage has been discouraged by measures such as the central London congestion charge (introduced in 2003).

Similar questions, but with slightly different frequency categories have been asked in the National Travel Survey since 1998 and in a one-off module as part of the British Crime Survey in 2004/5. These are compared with the BSA in section 9.

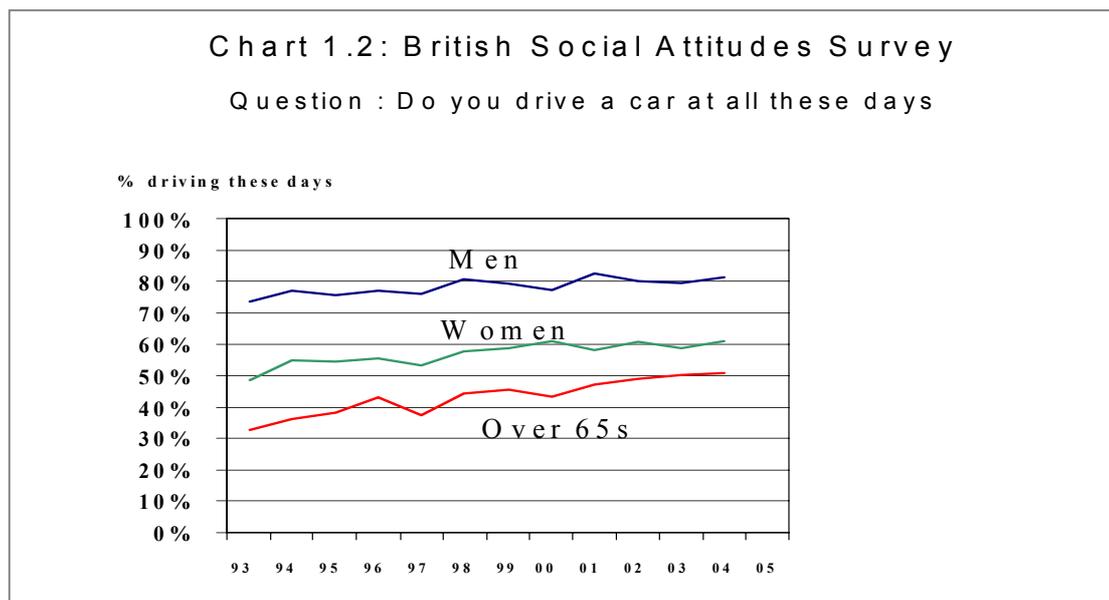
### 3. Car usage: as a driver

Chart 1.1 shows that the proportion of the population with a valid driving licence has risen from 67% to 72% over the period although most of that rise was in the earlier part. The proportion of people driving a car “at all these days” has risen more rapidly.

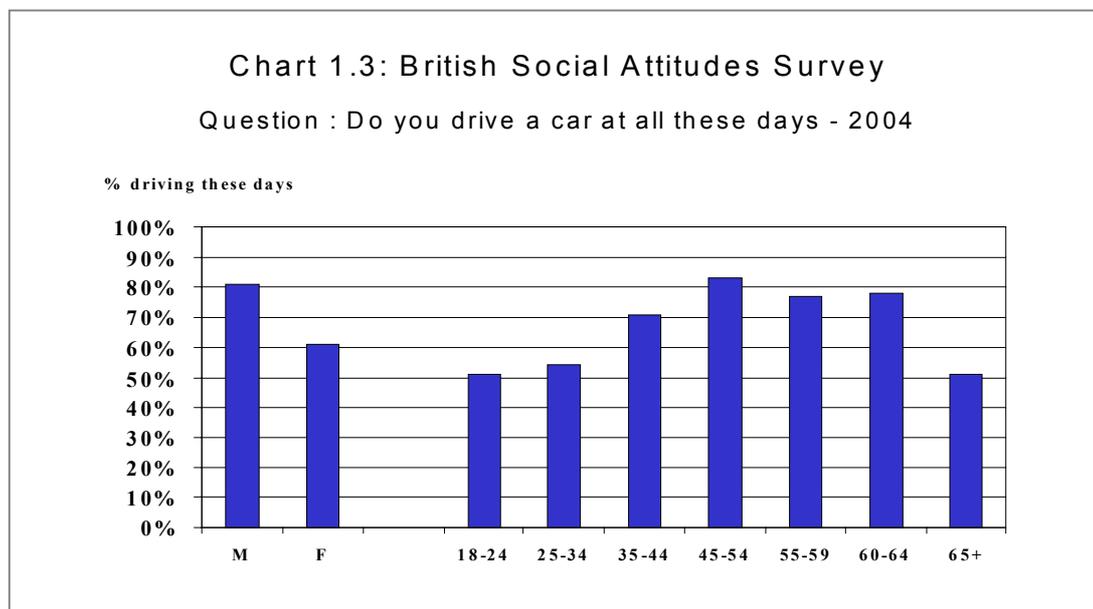


There has been a similar rise in London, although there appears to have been a slowing down in the past three years with a sharp drop off in 2005 which may be a statistical variation as other indicators such as car ownership in London or mileage driven on London’s roads have not changed significantly since the mid 1990s. Total mileage driven has risen by 17% across the country as a whole.

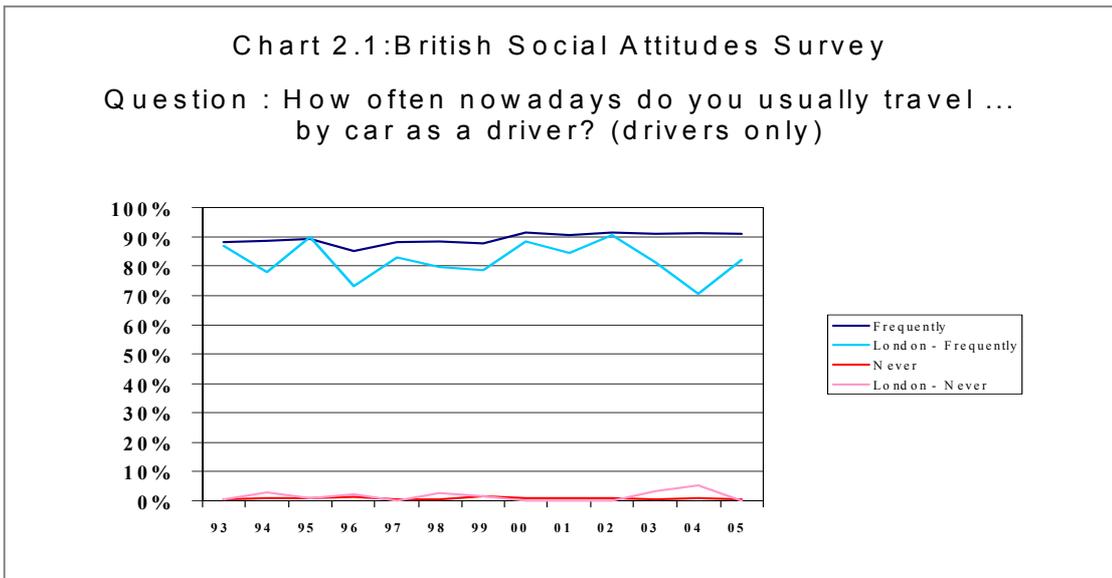
The proportion of men driving (Chart 1.2) has risen slightly from around 75% to 80% between 1993 and 2004 (2005 data not available) while for women it has risen from less than 50% to over 60%.



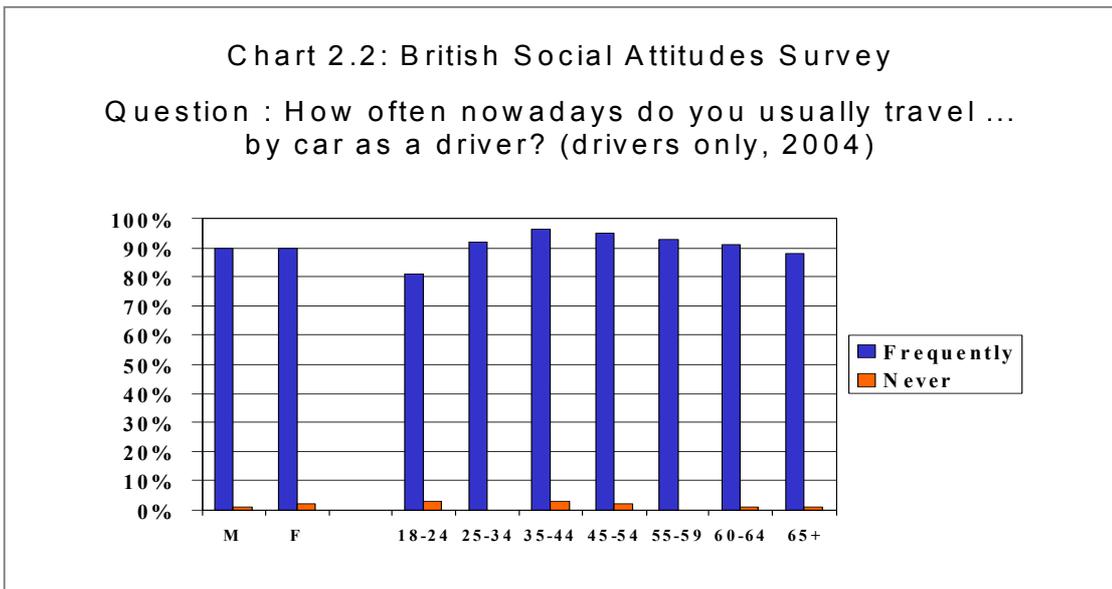
The rise in the proportion of over 65s driving is more dramatic – 33% to 51%, a trend which is likely to continue as more old people with driving licences (particularly women) replace a generation who never learned to drive. This has implications for the future travel patterns of older people who would otherwise use public transport.



During the period the proportion of car drivers who use their car “frequently” has risen from 88% to 91% while those who never drive is around 1%, leaving about 8% who use their car occasionally (Chart 2.1).



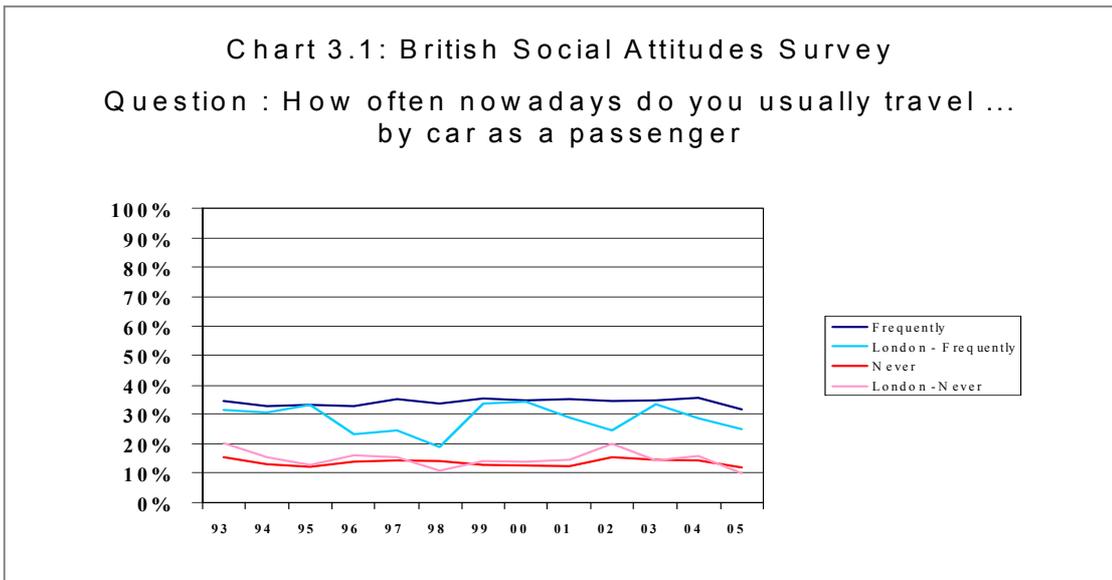
In London the proportion of frequent car drivers has fluctuated about 80% with a slight rise in 2002 and somewhat lower figures thereafter, suggesting there may be some reduction in car use in the capital (but see section 3a). The sample for London however is small and the figures must be used with caution.



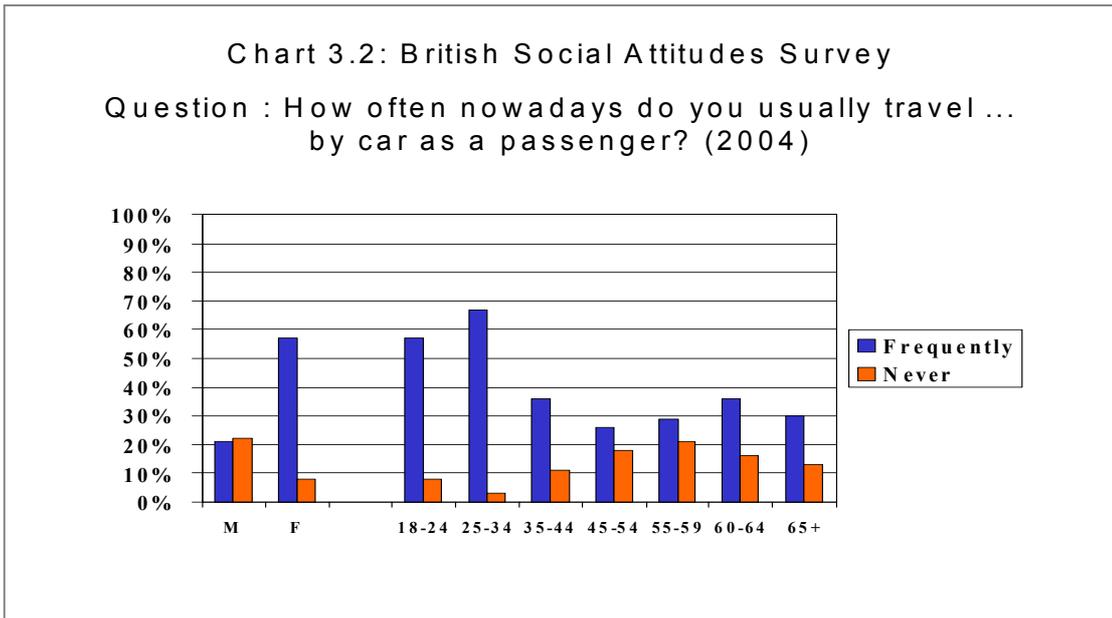
Once a driver has access to a car they are likely to use it frequently for all groups of drivers but usage peaks amongst the 35-44 who are most likely to have children in the family. However is still nearly 90% for older drivers. (Chart 2.2).

### 3.1 Car use: as a passenger

Chart 3.1 shows the equivalent figures for those who travel as a passenger in a car. Only 15% of the adult population in the country as a whole never travel by car as a passenger with a similar proportion in London.



About a third travels “frequently” as a passenger, the proportion having changed very little since 1993. The London usage is only slightly lower. While that leaves some 50% of the population who travel by car as passenger infrequently, many of these will be regular drivers who seldom travel as passengers.

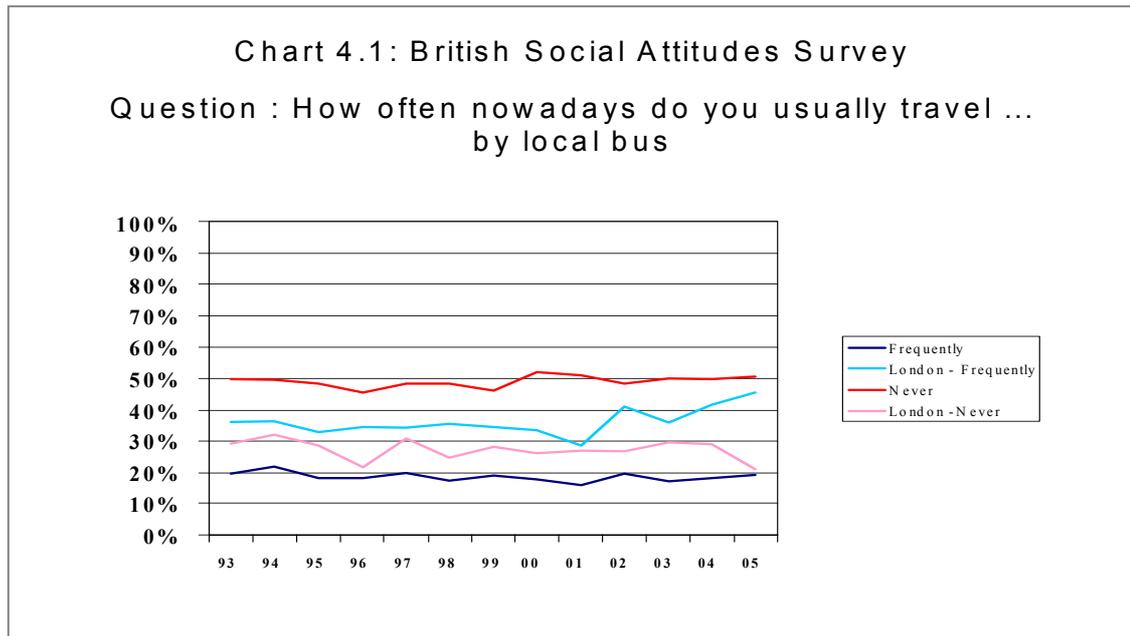


Women and young people are more likely to be carried as a passenger because they either cannot drive or do not have access to a car.

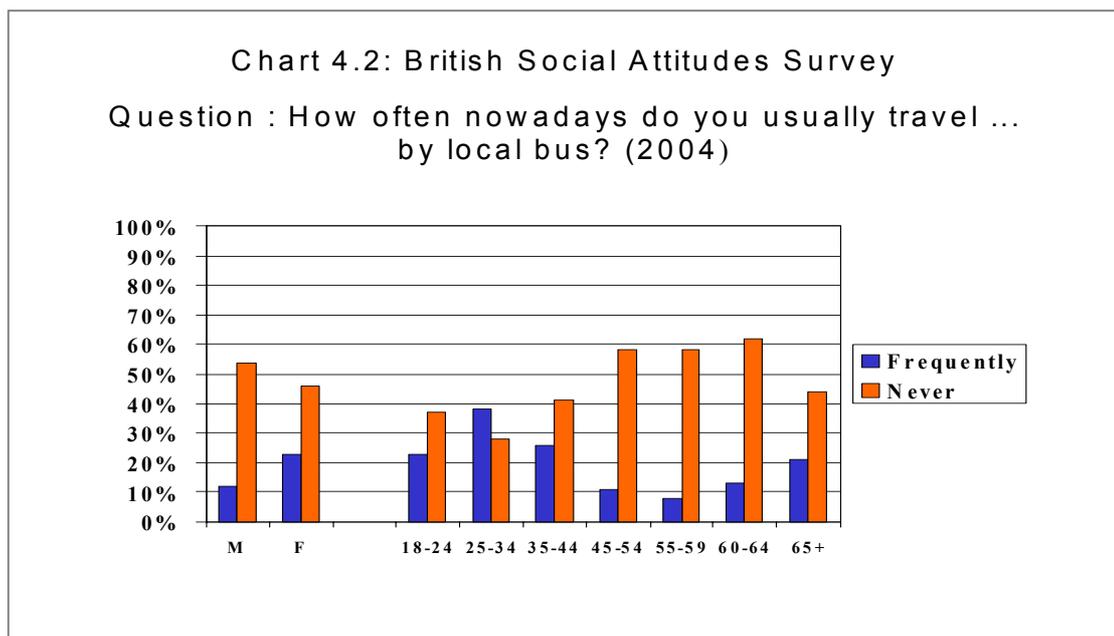
**4. Use of local buses**

Usage of buses in the UK has declined by 13% outside London over the past 10 years while increasing in London by some 50%, leading to a 5% increase overall. However, the BSA data show that the proportion of adults using buses frequently in the country as a whole has hardly changed, averaging 19%.

In London it was around 34% till 2002, since when it has risen to over 40%, corresponding to the big increase in bus mileage operated and patronage since 2000 (27% increase in bus kms, 41% increase in passenger kms).

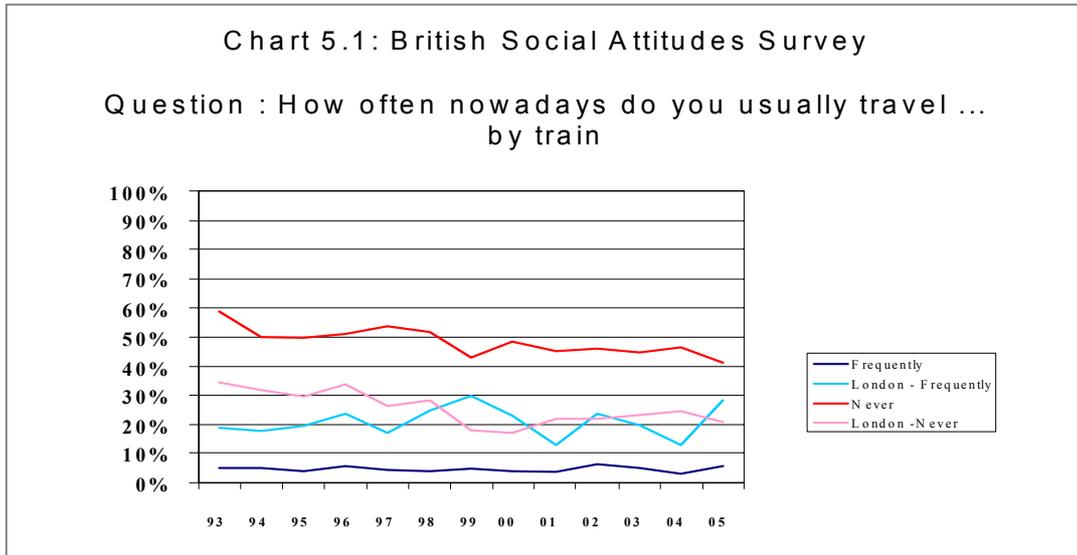


The number of people never using a bus in the UK is around 50%, a very slight increase over the period from 1993, while in London it has remained around 28%. This suggests that those who used to use a bus in London are now using it more, but those who never used a bus have not changed their behaviour. (There was a drop in those who never use the bus in London in 2005 but it is not clear whether this is statistically significant).

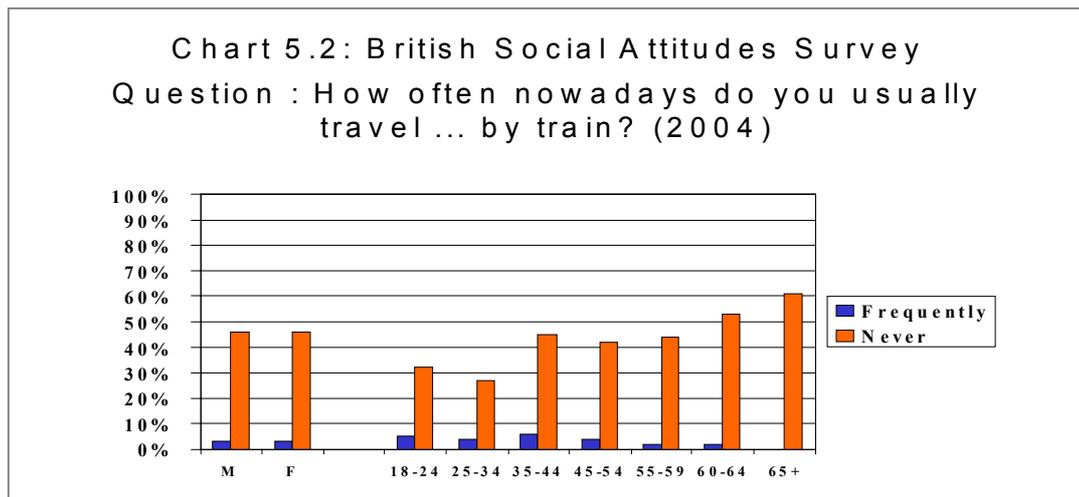


## 5. Use of trains

Nationally, there has been a marked increase in train usage, by 40% since 1993. Usage of the London underground has risen by 30% over the same period. Data from BSA show that the proportion of adults using the railways frequently has remained at around 5% but those who say they never use them has dropped from over 50% to just over 40%.



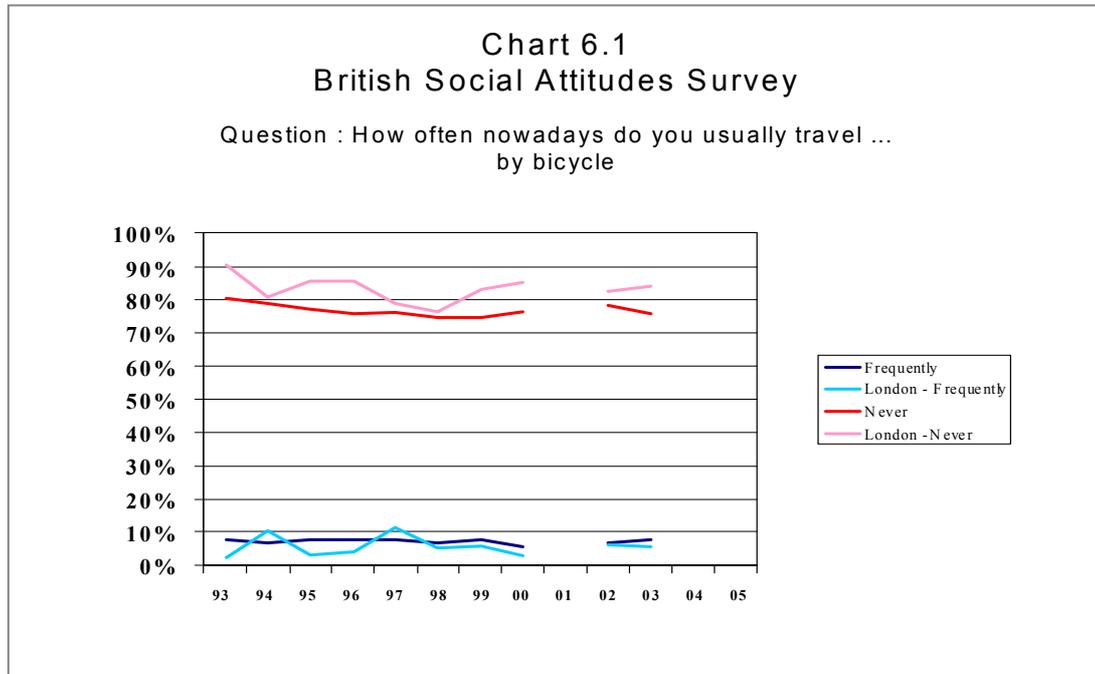
In London the regular use is much higher at around 20%; non-users dropped from over 30% to around 20% in 1997 and has remained constant since then. Unlike bus users in London, it seems that regular users of the railways nationwide have not changed their behaviour but people are more willing to consider trains for the occasional trip while those in London who already use the train are using them more intensively.



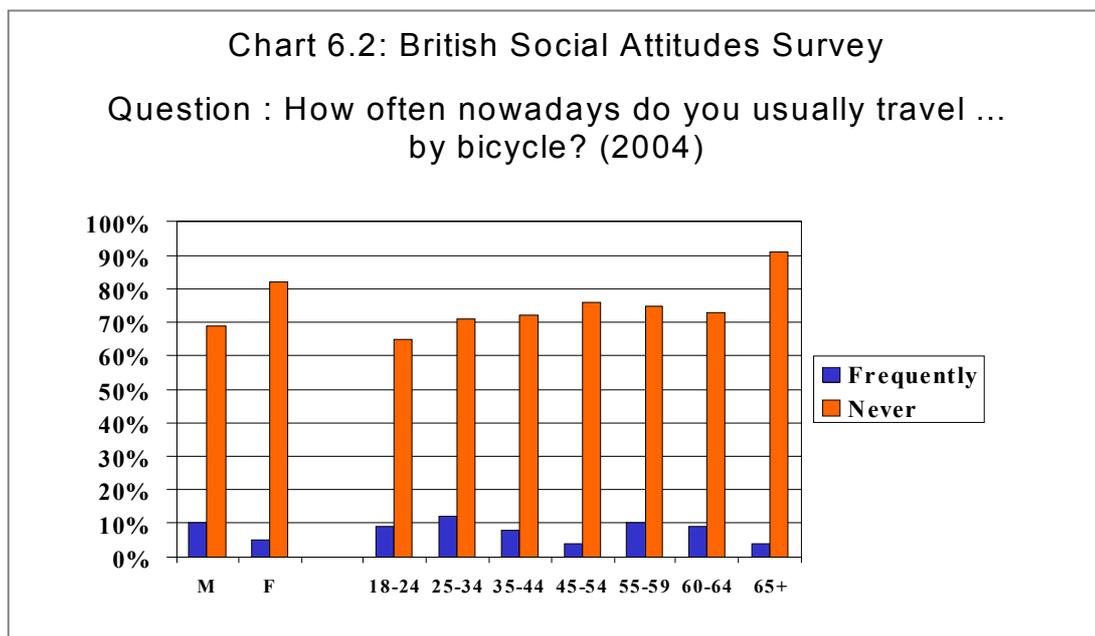
Usage of trains is similar amongst men and women; as people get older they are much less likely to use trains, reflecting ease of access, type of journey and in some cases high fares.

## 6. Cycling

The BSA data on cycling only cover a part of the period under review and stopped in 2003. During the period for which data are available there was little change in the proportions of those who cycle regularly (about 7% of the population in the UK as a whole and 5% in London) and those who never cycle (75% nationally, 83% in London), leaving around 18% who cycle occasionally nationally and 12% in London.

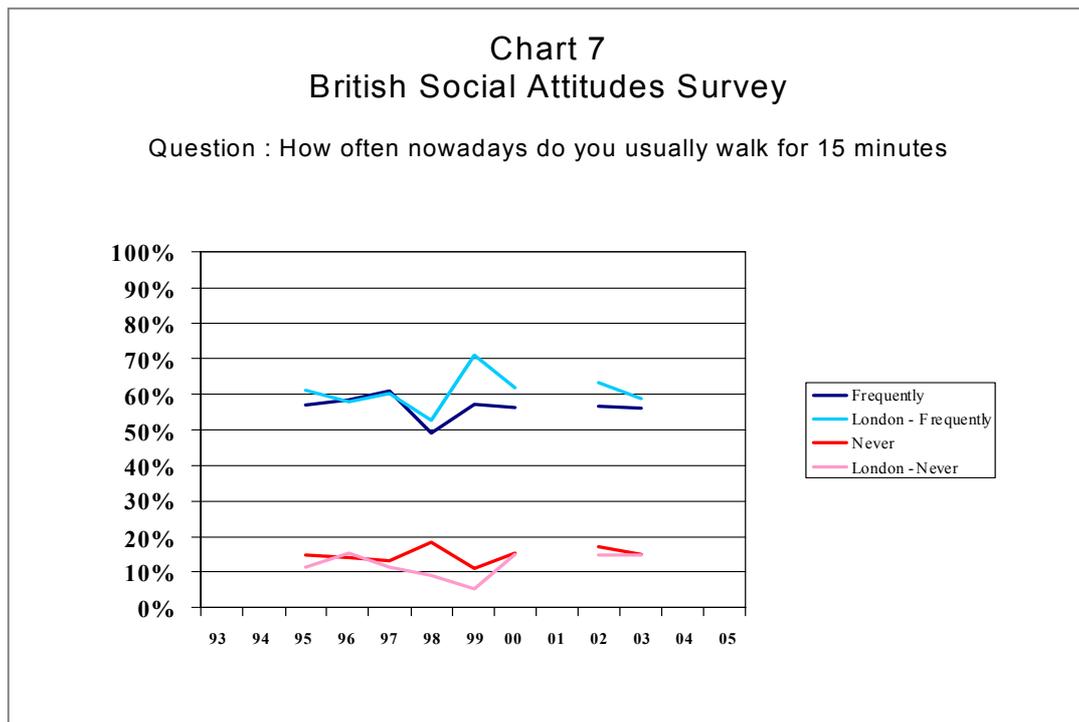


However, TfL reports a 50% increase in cycling in since 2002 – this is based on counters on the main networks and is not fully supported by NTS data, which covers all roads, but on a small sample. Men are more likely to cycle than women, reflecting commuting patterns and possibly greater awareness and need for health reasons, as there is an increase in cycling amongst 55 to 64 year olds.



## 7. Walking

As for cycling, the questions on walking have not been asked every year but for the limited period for which data are available, there has been little shift in the proportions of the population walking regularly for over 15 minutes (just under 60% nationally and just over 60% in London) while the proportions who never walk are around 15% both nationally and in London.



## 8. Attitudes to car use and improved public transport

The BSA has also asked various attitudinal questions asking people whether they would use their car less if public transport reliability were greatly improved or if fares were halved. These questions were only asked from 1997 to 2003 and 1997 to 1998 respectively.

Charts 8 and 9 show the responses to the question about improved reliability, nationally and for London, although it must be emphasised that the samples for London were small. The percentages exclude those without cars.

Over half of car owners both nationally and in London say they would respond to improved public transport by using their car a little or a lot less. For 35% nationally and 30% in London it would make no difference to their behaviour while 5% nationally and 10% in London might consider giving up their car altogether, reflecting the better access to public transport in London. The proportions prepared to use their car less increased both nationally and in London between 1997 and 2003.

Chart 8: British Social Attitudes Survey

Question : What effect, if any, might greatly improving the reliability of local public transport have on how much you yourself use the car?  
Nationally

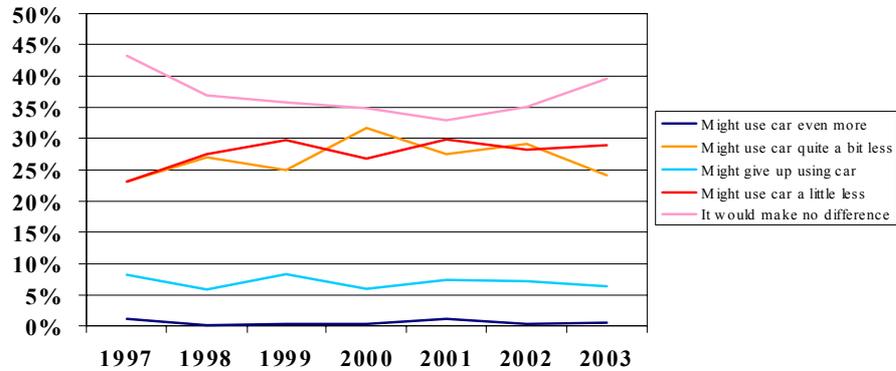
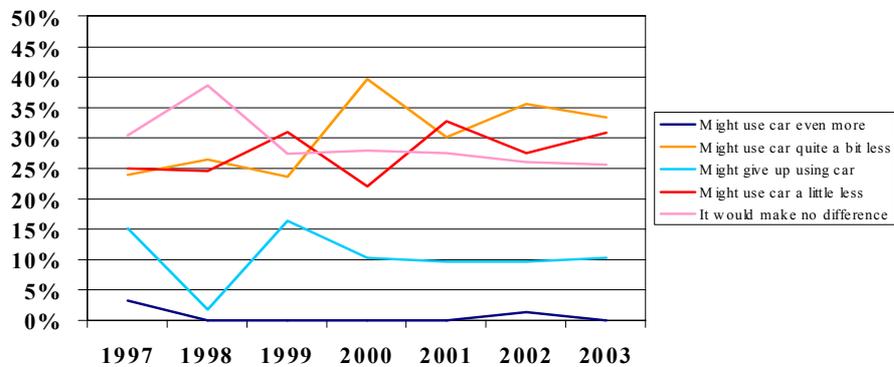


Chart 9: British Social Attitudes Survey

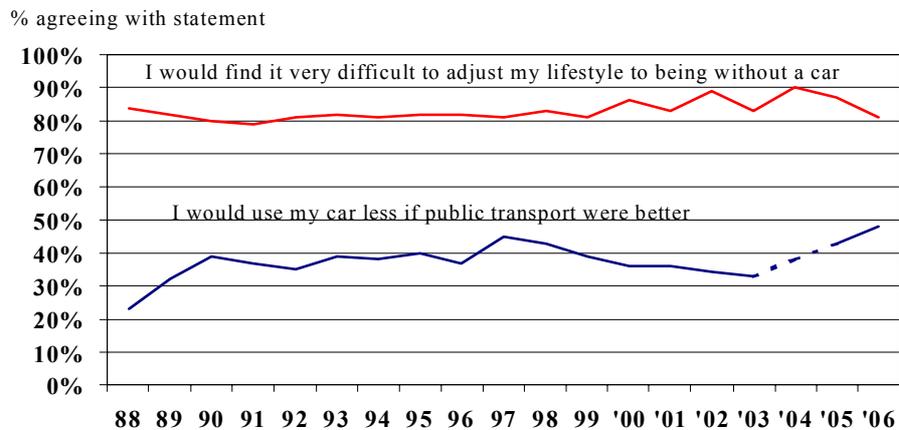
Question : What effect, if any, might greatly improving the reliability of local public transport have on how much you yourself use the car?  
London



Drivers were slightly less willing to change their behaviour if fares were reduced compared with better reliability; about 10% more would not change with a corresponding reduction in those who would use their car less. The proportions saying they would give up their cars were the same for both scenarios.

The RAC Reports on Motoring (published since 1989, originally as the Lex Report) have been monitoring two aspects of reliance on cars. The survey is based on a national sample of around 1,500 regular motorists, defined as those who drive at least once a month.

## Chart 10 RAC/Lex Reports on Motoring



Sample: Approx 1500 motorists driving at least once a month

Over 80% of motorists say they would find it very difficult to adjust their lifestyle to being without their car. On the other hand around 40%, would “use my car less if public transport were better”. “Better” public transport was not defined – unlike the BSA where “better” was either “improved reliability or “half price fares”. Interest in using a car less and switching to public transport peaked in 1997 when the newly elected Labour government made it a key plank of its transport policy but the results of the 2006 survey show a marked increase in support for public transport and corresponding drop in dependence on the car.

### 9. Conclusions

This analysis suggests that those already using public transport are the only ones who have used it more since 1993. People who have never used a bus have not been persuaded to give it a go. The number of people driving a car has risen steadily over this time and the number of frequent car drivers is also on the increase.

It is clear from this research that we are just as car dependent today as we were in the early 1990s. Trying and experiencing new things is part and parcel of our everyday lives, but where transport is concerned we tend to stick with what we know. The fact that 50% of people have never used a bus shows that buses are not suitable or attractive proposition for many people.

If we are to see a different pattern of car dependency over the next twelve years public transport needs to provide a much better and more reasonable alternative to the car. Previous RAC Foundation work on Car Dependency has found that twenty percent of car journeys could be made by transport other than the car. Progress on this outcome has been slow, but if the right mix of targeted solutions are put in place to provide a real alternative to the car for certain journeys some lasting changes could be seen in the future.

## APPENDIX: Comparisons with National Travel Survey and British Crime Survey (2004/5)

The NTS has asked similar questions about bus, train and cycle use and also walking over 20 minutes since 1998. The BCS, in a one-off research into attitudes to crime on transport, asked about usage of bus, mainline train, local train, tram or light railway and Underground/tube/metro. The classification of frequency of use is different between the three studies making exact comparison difficult, but the broad results are very similar between the three studies where comparisons can be made, except that BCS records much lower use of train.

Table 1 Comparison of Different Surveys

	<b>BSA</b>	<b>NTS</b>	<b>BCS</b>
<b>Sample size</b>	1,100		11,000
<b>Modes</b>	Car driver		
	Car passenger		
	Local bus	Local bus	Bus
	Train	Train	Main line, local, metro, tram
	Bicycle	Bicycle	
	Walking over 15 mins	Walking over 20 mins	
<b>Frequency bands</b>	Daily		Every day or almost every day
	Some days	3 or more times a week	
		Once or twice a week	At least once a week
	Weekly	Less than that but more than twice a month	
	Monthly	Once or twice a month	At least once a month
	Less often	Less than that but more than twice a year	
		Once or twice a year	Once or twice a year
	Never	Less than that or never	Never

Table 2 Comparison of results

<b>%</b>	<b>BSA</b>	<b>NTS</b>	<b>BCS</b>
	<i>2004</i>	<i>2004</i>	<i>2004/5</i>
<b>Use of bus</b>			
Daily/Every day or nearly every day	7		12
3 or more times a week/2-5 days a week	10	16	
Some days/Once a week	7	11	15
Weekly/Less often but at least once a month	9	11	14
Monthly/Less often than that	16	17	16
Never/Never nowadays	50	44	44
<b>Use of train</b>			
Daily/Every day or nearly every day	2		2
3 or more times a week/2-5 days a week	2	5	
Some days/Once a week	2	9	2
Weekly/Less often but at least once a month	13	13	8
Monthly/Less often than that	36	20	13
Never/Never nowadays	46	53	75

## REFERENCES

- British Social Attitudes Survey, National Centre for Social Research
- On-line <http://www.britsocat.com/Body.aspx?control=BritSocAtHome>
- National Travel Survey – Department of Transport
- British Crime Survey - Home Office
- RAC Reports on Motoring – RAC, London.

---

**The Royal Automobile Club Foundation for Motoring**  
*Working for safer roads, safer drivers, greener motoring, improved mobility  
and a fair deal for motorists.*

89 Pall Mall  
London SW1Y 5HS

[www.racfoundation.org](http://www.racfoundation.org)

registered charity no: 1002705