Official Statistics

National Travel Attitudes Study: Wave 5

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Main findings

Off-road and segregated cycle paths (55%), safer roads (53%) and well-maintained road surfaces for cycling (49%) were chosen most often when Wave 5 respondents (who didn't state that cycling is impossible for them due to their disability) were asked about things that would encourage them to cycle more.

Nearly two-thirds (64%) of the sample support the creation of dedicated cycle lanes in their local area, even if this means less road space for cars.

58% of Wave 5 respondents reported to feel confident when riding a bicycle. Men (74%) felt more often confident than women (43%).

Of those respondents who didn't feel confident about their cycling skills, 14% displayed interest in attending a cycle training course. Interest was highest in the age group 35-44 (29%).

51% of Wave 5 respondents agreed that e-bikes are too expensive, with only 4% disagreeing with the statement. Nearly two in three indicated that they know very little about e-bikes.

Similar to the trends displayed in Wave 4, Wave 5 respondents reported substantially decreased usage of all travel modes compared to before the pandemic with the exception of the active travel modes walking and cycling.

A [redacted] that contains the underlying data for each question in this report is available.

Cycling

Questions in this section relate to the ownership of bicycles, things that would encourage respondents to cycle more, reasons why respondents don't cycle or don't cycle more, and opinions regarding the creation of dedicated cycle lanes. With the exception of the questions regarding bike ownership and dedicated cycle lanes, questions in this chapter were not asked to those respondents who reported that their disability makes cycling impossible. The majority of Wave 5 respondents reported to have no regular use of a bicycle.

While 38% of Wave 5 respondents reported to either own a bicycle themselves (36%) or have regular use of a bicycle owned by someone else (2%), 62% reported to have no regular use of a bicycle. The share of Wave 5 respondents owning or regularly using bicycles has not substantially changed since 2019. When the same respondents were asked the same question during the NTS 2019, 37% reported to own a bicycle, 1% reported to have regular use of a bicycle owned by someone else and 61% reported having no regular use of a bicycle.

Chart 1: Ownership of bicycles among respondents during the National Travel Survey 2019 and National Travel Attitudes Survey Wave 5 in 2021

When respondents, who did not state that cycling is impossible for them due to their disability, were given a list of reasons and asked which (if any) of them would encourage them to cycle more, reasons related to cycling infrastructure and safety were mentioned most often. Off-road and segregated cycle paths (55%) and safer roads (53%) were both mentioned by more than half of the sample.

Other incentives related to infrastructure that were mentioned by a substantial share of respondents include well-maintained road surfaces for cycling (49%), more direct cycle routes (43%) and raising awareness of local cycle routes (36%). Another group of incentives that were mentioned by a considerable part of the sample was related to finances and cycle hire facilities.

27% mentioned cheaper bicycles available to buy, 18% mentioned cheaper bicycles to hire and 17% named better bicycle hire facilities as incentives that would encourage them to cycle more. In addition, 6% specified some other incentive, other than the ones presented to them in the question, and 23% reported that none of the listed incentives would encourage them to cycle more.

Chart 2: We know there are many reasons preventing people from cycling or cycling more, which of the following, if any, would encourage you to cycle more?

Those respondents who had stated that safer roads would encourage them to cycle more were offered a follow-up question in which they were asked how important they consider four different aspects of safer roads. Nearly all respondents (98%) stated that more considerate drivers are either very important or fairly important in that regard. Less traffic (88%) and slower driving speeds (86%) were also marked as important by a large proportion of the sample. 'More roads where cars are banned or restricted for part of, or all of the time' was considered important by two-thirds of the sample.

Chart 3: When thinking about safer roads, how important, if at all are the following aspects to you?

Likewise, respondents who had stated that secure parking or storage might encourage them to cycle more were asked about the importance of different aspects of secure storage. All four offered options, namely secure bicycle parking provision or storage at home (89%), at work (87%), at stations (87%) and on-street (84%) were considered important by a large proportion of those respondents who were asked this question.

Chart 4: When thinking about secure parking or storage, how important if at all are the following aspects?

Respondents who had indicated that none of the listed options would encourage them to cycle more were further probed by asking for the reasons why they do not cycle or do not cycle more. Of all listed reasons 'Cycling is not for people like me' (27%) was picked the most often, followed by 'I am concerned about safety' (25%), 'I am not confident in my cycling skills' (24%) and 'Poor weather' (18%). All other options were ticked by less than 15% of respondents who were asked this question. 37% stated that none of these reasons applied to them.

Chart 5: We know there are many reasons why people choose to not cycle, or do not cycle more, of the following, which of these apply to you?

The majority of NTAS Wave 5 respondents supported the creation of dedicated cycle lanes in their local area, even if this means less road space for cars. Nearly two-thirds of the sample either strongly supported (39%) or somewhat supported (25%) this proposal. Around 1 in 5 respondents either somewhat opposed (10%) or strongly opposed (9%) dedicated cycle lanes in their local area. The rest (17%) stated that they neither support nor oppose the proposal.

Chart 6: To what extent do you support or oppose the creation of dedicated cycle lanes in your local area, if this means less road space for cars?

Cycle training

Questions in this section relate to respondents' confidence when cycling, the share of respondents that has completed a cycle training course, interest in cycling training courses, and things that would encourage people to complete a cycle training course.

The majority of Wave 5 respondents reported to feel confident when riding a bicycle. While:

- 25% stated to feel very confident
- 33% to feel fairly confident when riding a bicycle
- 18% said that they feel not very confident

- 15% that they feel not at all confident
- 9% reported that they had never ridden a bicycle before

Chart 7: How confident do you feel when riding a bicycle?

The data suggests that men feel substantially more often confident about cycling than women. While 74% of all male respondents reported to feel fairly or very confident when riding a bicycle, the same was only true for 43% of all female respondents.

Chart 8: Confidence when cycling by gender

Respondents were further asked if they had completed a cycle training course in the past, which slightly more than half of the sample answered with 'No'. 44% stated that they had completed a cycle training course as a child. A very small proportion indicated that they had completed a cycling course as an adult, either within the last 5 years (1%) or more than 5 years ago (2%).

Chart 9: Have you ever completed a cycle training course?

Respondents who did not feel confident in their cycling skills and who had not completed a cycle training course as an adult were further asked about their interest in taking part in a cycle training course. The majority (81%) reported that they had no interest in a cycling course. However, 11% indicated to be fairly interested and 3% to be very interested. The remaining 5% answered with 'Don't know'.

Chart 10: How interested are you in participating in an adult cycle training course?

Further analysis shows that there are considerable differences between age groups. While 16% of the youngest age group (16 to 24) that were asked this question displayed interest in a cycle training course, the interest seemed to increase with age and peaked in the age group 35 to 44 in which 29% displayed interest. The share of interest then gradually decreased and was lowest in those 75 and older of whom 3% displayed interest in a cycle training course.

Chart 11: Interest in taking part in a cycle training course by age group

The same respondents were probed about incentives that might encourage them to take part in a cycle training course. Free training, which was named by 24%, turned out to have the strongest impact, followed by incentives such as vouchers or free cycling equipment (18%) and training followed by guided rides or training refreshers (16%). Training with family, for half the price, offered through the workplace and carried out during worktime, and targeted training for disabled people were chosen by between 9% and 12% of the sample. The majority of respondents (62%) stated that none of these incentives would encourage them to undertake a cycling course.

Chart 12: Which, if any, of the following, would encourage you to undertake a cycle training course?

Electric bicycles (e-bikes)

Questions in this section relate to e-bike ownership and usage, interest in trying an e-bike, incentives that might encourage e-bike purchases and general opinions towards e-bikes.

A very small proportion of the sample has access to e-bikes. When those who did not state that their impairment makes cycling impossible were asked if they owned an e-bike, 3% stated to own one and 1% stated to have regular use of one. The rest (97%) reported that they did not own or regularly use an e-bike.

Those who did not own or regularly use an e-bike were asked if they had ever used an e-bike to which 7% answered with yes and 93% with no.

Respondents who had never used an e-bike before were further asked if they were interested in riding an e-bike if they had the chance to do so which 35% answered with yes and 46% with no. The remaining 19% stated that they would need more information.

Chart 13: E-bike ownership, previous e-bike use and interest in e-bike use

Respondents who did not own an e-bike were asked if certain incentives would encourage them to using or buying an e-bike. A substantial share of respondents stated that initiatives that make buying an e-bike more affordable either in the form of a direct discount (43%) or lower taxes on the cost of buying an e-bike (31%) would be most likely to encourage them to consider buying an e-bike.

Free opportunities to try riding an e-bike either in a traffic-free environment (40%) or in the form of a free loan of an e-bike for one month (32%) were equally popular. Discounts on hiring an e-bike for the day (20%) and car scrappage schemes to help pay for an e-bike purchase (9%) were selected by fewer respondents. 2 in 5 of respondents stated that none of these options would encourage them to consider using or buying an e-bike.

Chart 14: Which of the following are most likely to encourage you to consider using or buying an e-bike?

Respondents that did not own an e-bike already were further probed about the relationship between the likelihood of buying an e-bike and different payment methods. When confronted with the scenario of paying the full cost upfront, 15% of respondents considered it either very likely or fairly likely that they would buy an e-bike within the next 3 years. The rest considered this not very likely or not at all likely.

The prospect of paying for the e-bike with the help of a grant or incentive that provides a small discount, or an interest free credit arrangement that allows to

spread the payment over a number of months or years both increased the perceived likelihood of purchasing an e-bike over the next 3 years to 22%.

Chart 15: How likely would you be to buy an e-bike within the next three years using the following payment methods?

To conclude this section, respondents were asked to what extent they agreed with certain statements about e-bikes. A slight majority of the sample (52%) agreed or agreed strongly that e-bikes are too expensive. A small proportion (4%) disagreed or disagreed strongly with this statement. The statement that e-bikes are likely to be stolen produced a similar picture with 54% agreeing and 6% disagreeing. Nearly 1 in 3 respondents agreed that they would struggle to store an e-bike where they live, with 42% disagreeing with this statement. Around one in five of respondents agreed that e-bikes are too heavy with 11% disagreeing. That e-bikes travel too fast was agreed by 11% and disagreed by 28%.

Nearly two-thirds (64%) of respondents agreed with the statement that they know very little about e-bikes and 15% disagreed. For each statement where the percentages do not sum to 100, the missing respondents answered that they neither agree nor disagree with the statement. The proportion of respondents who chose that answer option was particularly high for the statements ‘E-bikes are too heavy’ (70%) and ‘E-bikes travel too fast’ (61%) which may illustrate the inexperience of many respondents with handling e-bikes.

Chart 16: To what extent do you agree or disagree with the following statements?

Walking

The questions in this section cover the reasons why Wave 5 respondents don’t walk or don’t walk more.

When respondents were asked for things that would encourage them to walk more, the answer option “Well-maintained pavements (even, clean, uncluttered,

well-lit)" proved to be most popular and was chosen by 74% of the sample. Other options related to walking infrastructure, such as more direct walking routes (43%) and "Better provision for health needs (e.g. benches, public toilets, access ramps)" (40%) were also chosen frequently as were options relating to safety such as safer roads (45%) and more safer crossing points (44%).

The 2 answer options related to information, namely better maps and signposting, and provision of information on walking routes were both chosen by around a third of the sample. Less often named as incentives that would encourage more walking were less road noise (24%) and access to showers or changing facilities at destination (8%). One in ten respondents indicated that none of the listed things would encourage them to walk more and 8% specified various other reasons.

Chart 17: Now thinking about walking, which of the following, if any would encourage you to walk more? This also includes using any mobility aids.

Travel behaviour during the coronavirus (COVID-19) pandemic

The fourth wave of the National Travel Attitudes Study, for which data was collected between May and September 2020, was focused on travel behaviour and transport attitudes during the coronavirus (COVID-19) pandemic. Some of the questions were asked again during Wave 5 in order to create some insight into how travel patterns have changed during different stages of the pandemic.

Wave 5 respondents surveyed between January and February 2021, during which travel restrictions and social distancing measures were active, were asked about the purposes for which they had travelled from their home in the last 7 days. Only grocery shopping (76%) and exercise (54%) were named by more than half of the sample. One in three respondents reported that they had left the house to go to work at least once, 26% said the same about shopping for things other than food and 23% had left home for a medical appointment. Visiting friends or relatives

(17%), travelling to school, college or university (5%) and going out to eat or drink (3%) were mentioned less often.

Chart 18: In the last 7 days, how many times, if at all, have you travelled from your home for any of the following purposes?

Chart 19 shows how the frequency of conducted trips by purpose measured during the NTAS Wave 5 fieldwork period compared to the frequency measured during two sampling stages between May and September 2020 in NTAS Wave 4 and to data from the National Travel Survey in 2019. Since behavioural data from NTS and NTAS is collected in different ways, there is a degree of uncertainty with regard to the comparability of both data sources and caution should be practiced when interpreting results. In order to improve comparability, only NTS respondents who were 16 and older were included. The chart shows that trip rates to go to work fell from around 4 per person per week during the NTS to around one and a half in all NTAS sampling periods. Likewise, trips to go to school or university and trips to go shopping for things other than food fell substantially.

The frequencies of trips to go food shopping were on similar levels during all NTAS sampling stages than they were during the NTS 2019. Trips to go eating and drinking were much lower during the hard lockdown periods in January and February 2021 and during the early summer in 2020 but were on comparable levels to the NTS 2019 during the sampling period in August and September 2020 which coincided with the easement of restrictions and the 'Eat out to help out' scheme. Trips for exercise were conducted more than twice as often during all NTAS sampling stages than they were during the NTS 2019.

Chart 19: Comparison of the frequency of conducted trips by purpose during NTAS Wave 5, NTAS Wave 4 and NTS 2019

When respondents were asked about the modes of transport they had used in the previous seven days, private cars (73%) and walking (69% for exercise and 52% to get somewhere) were mentioned most often. All other modes, such as local bus

services (9%), cycling (8% for exercise and 6% to get somewhere), train services (3%) and planes (0.5%) were mentioned far less often.

Chart 20: Thinking about all the times you have travelled from your home in the last 7 days, how many times, if at all, have you…

When pre-pandemic users of different transport modes among Wave 5 respondents were asked about how their use of these modes had changed from before the first confirmed case of the coronavirus in the UK, public transport modes in particular saw a decline in use. 91% of existing train users reported to use trains less often in January and February 2021 than before the pandemic, followed by trams (89%) and buses (82%).

Taxi users (80%) and car users (71%) reported also frequently to use these modes less often than before the pandemic. The active travel modes walking and cycling were less affected by usage decline. While 39% of cyclists among Wave 5 respondents (surveyed between January and February 2021) reported to cycle less than before the pandemic, 20% reported to cycle more and 41% to cycle about the same as before the pandemic. In terms of walking, the data does not show a clear trend with 35% reporting to walk more, 35% to walk less and 30% to walk as much as before the pandemic.

Chart 21: Comparing now to before there was a confirmed case of coronavirus in the UK, how much are you using the following modes:

Wave 5 respondents who reported to use active travel modes more than before the pandemic were asked for the underlying reasons. Most respondents (86% of those who walked more and 88% of those who cycled more) mentioned improving health and fitness as reasons for higher active travel use. Avoiding public transport due to government advice (32% for walking and 30% for cycling) or due to personal concerns (26% for walking and 20% for cycling) was also mentioned frequently. All other reasons were mentioned less often.

Chart 22: Why are you walking more than before?

Chart 23: Why are you cycling more than before?

Methodology

The National Travel Attitudes Study (NTAS) collects data on the attitudes of individuals aged 16 and over across England. These surveys are designed as small snapshots, and as such there is the possibility of multiple “waves” throughout a year. Individuals who have completed the National Travel Survey (NTS) and have consented to taking part in the NTAS panel, are contacted with an offer of completing the wave of NTAS questions. The NTAS is a random probability sample with respondents drawn from the NTS, and responses are weighted to take account of the mode of delivery, and to reflect the population. Initial contact is via letter and email, and by SMS text message (where the information is available).

If no response is received within 2 weeks, this is pursued via a telephone call.

Parent surveys

The National Travel Attitudes Study (NTAS) arose as a product of the National Travel Survey (NTS), and we are using it to ask the transport questions previously on the British Social Attitudes (BSA) Survey.

National Travel Survey

The National Travel Survey (NTS) is a household survey designed to monitor long-term trends in personal travel and to inform the development of policy. It is the primary source of data on personal travel patterns by residents of England within Great Britain. It began in 1965 as the first national travel survey in the world and has been running continuously since 1988.

The survey collects information on how, why, when and where people travel as well as factors affecting travel (e.g. car availability and driving licence holding). Respondents are drawn by a probability sample based on post codes across England. The NTAS uses NTS respondents who have consented to completing

further surveys. As a result we can expect the sample size to increase as future years of the NTS provide new members to the NTAS cohort. In addition, this allows a link to be drawn between a respondent's travel behaviour and their travel attitudes, as long as the sample size is sufficient for the comparison to be drawn. More information on the NTS can be found on the [redacted].

Strengths and weaknesses of the data

The respondents to the National Travel Attitudes Study (NTAS) are drawn from those who completed the National Travel Survey (NTS). This allows us to directly compare attitudes towards travel and transport revealed by the NTAS, to the travel behaviour identified during the NTS. This also reduced the number of demographic questions that need to be asked, resulting in a shorter survey than if it were asked of a random selection of the public. The NTAS data relates only to respondents aged 16 and over in England.