



## TRANSPORT DECARBONISATION DRILL DOWN: CONSUMER SURVEY & FOCUS GROUPS

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## Executive Summary

In November 2022, The Consumer Council commissioned Social Market Research (SMR) to undertake focus groups and a consumer survey on issues relating to decarbonisation and transport in Northern Ireland. The research is based on two elements: seven focus groups with consumers; and, a large-scale quantitative survey of consumers (n=1034). The research was conducted in accordance with the ISO20252 Standard and fieldwork was carried out between January and March 2023.

### Key findings from the focus groups

#### The complexity of journeys

- People's journeys can be complex, with multiple elements such as shopping, school run, and commute all being combined in one trip.
- Most consumers do not see how they could use public transport for these complex journeys.
- Where journeys are more straightforward, and public transport is convenient, then most would be willing to consider leaving their cars at home.

#### More flexible public transport solutions needed

- Town buses to do local drop offs would be good on a continual and frequent loop that goes into estates and criss-crosses the main routes.
- It is inconvenient to get a bus into town and out again, so a journey that would be 30mins by car can take two hours.
- Additional, smaller, buses that cross the city instead of everything going in and out of the centre.

#### Other barriers to using public transport

- Public transport can be inconvenient for families and the buggies, bags and so on that have to accompany them on a trip.
- For public transport to be considered as a viable alternative to the private car it needs improved (cleaner, greener, cheaper and on time).
- Consumers say that they should not be dissuaded from using their cars until they have viable public transport alternatives.

#### Congestion charges

- Congestion charges may work to discourage some drivers from using their cars. Congestion charging won't work for all. Some will just pay up to use our cars.
- Any money raised should be kept within Northern Ireland and used to improve public transport.

#### Slowing cars down or narrowing lanes

- Consumers thought that narrowing lanes or slowing traffic down might only increase congestion because they would still have to make their essential journeys only at a slower pace.
- Some added that going at a slower pace it can increase emissions if cars are being driven in low gears.

#### Cycling

- Cycling is good if you live near a town, but bikes cannot be put on buses for part of a longer journey.

- Joined up thinking is needed on bicycle lanes, bike parking, being able to put a bike on a bus or a train or being able to mix your journey, part by bike and part by car.
- Cycling is not for everybody or for every trip. It would be a difficult thing to encourage it as a viable alternative to the car or public transport for most trips.

#### Physical barriers between cycle lanes and car lanes

- Physical barriers between cyclists and cars were said to be a good idea.
- Physical barriers between cyclists and motorists would make both feel safer.
- Physical barriers would encourage more people to cycle.

#### Improving Park and Ride

- Improved Park and Ride was seen by focus group participants to be the easiest way to reduce the number of cars going into towns and cities.
- Park and Ride must be serviced by cheap and environmentally friendly shuttle services into and back out of the centre.
- The security and lighting needs to be improved at some Park and Ride schemes and they need to stay open late with shuttle buses continuing to run at night.

#### Reducing parking

- More expensive or reduced parking could mean fewer people in town and city centres which would have a negative impact on commercial footfall.

#### Support for pedestrianisation of towns and cities

- Fewer cars could enable attractive city centres with green spaces.
- Pedestrianisation could be part of an overall repurposing of town centres, transport is only one aspect of this.

#### Free or subsidised public transport

- Improving public transport should be prioritised over making it cheaper or free.
- Free public transport might result in buses and trains being overwhelmed with passengers.

#### Key findings from the survey

##### Use of different forms of transport

- 71% of consumers say they most often use a car to get about (walking, 19%: bus, 8%: cycle, 1%: train, 1%)
- Just 29% most often use an alternative to a car to get about
- 29% have never thought about using public transport in N Ireland
- 13% are starting to think, planning to start (5%) or recently started (9%) using public transport

##### Barriers to using public transport

- 29% say poor service (availability / frequency) is the single biggest barrier to using public transport (locationally inconvenient to access public transport, 20%: cost, 15%)
- Less than half of consumers believe that public transport in N Ireland is affordable (49%), convenient (45%) or is frequent enough to meet their needs (36%)
- 25% say they are dependent on public transport but most consumers say they are not (75%) [*younger consumers, those with a disability, those in low income households and those living in urban areas are significantly more likely to be dependent on public transport*]

### Reducing use of private cars and increasing use of public transport

- 61% believe that it would be difficult to reduce their use of private cars (easy, 28%)
- Living in a rural area is the most common reason why consumers believe it would be difficult to reduce their use of private cars (25%) with the convenience offered by a private car cited by 18% of consumers
- 57% believe that it would be difficult to increase their use of public transport (easy, 32%)
- Poor frequency of services (20%) and lack of stops nearby (15%) are the most common reasons why consumers believe it would be difficult to increase their use of public transport
- More frequent bus and train services (22%), and improved service availability (18%), were the most important things that consumers believe need to change for consumers to use public transport more often

### Public support for different measures to reduce car use

- 65% support traffic calming measures to reduce the speed of traffic to accommodate other road users
- 56% support increasing the number of cycle lanes
- 51% support having 'low traffic neighbourhoods' where vehicle access is restricted
- 30% support congestion charging for those driving into cities and large towns in N Ireland
- 16% support increased taxation of petrol and diesel cars to deter private car use
- 18% support banning petrol and diesel cars
- 23% support increasing the cost of carparking to deter people from driving into towns and cities

### Factors that would encourage consumers to use their car less and use public transport more

- 80% said that easier access to different forms of public transport would encourage greater use (free public transport, 80%: cheaper bus and rail fares, 74%)
- Free public transport is the *most likely* thing that would encourage greater use of public transport (31%)

### Investment in public transport and willingness to pay

- 63% say investment in public transport in N Ireland is a priority (major, 25%: minor, 38%)
- £8.70 is the average congestion charge that would stop consumers taking their car into a town or city
- £6.10 is the average hourly carparking rate that would stop consumers taking their car into a town or city
- 62% say the money raised via congestion charging should go to local councils and they decide how to spend it
- 40% say that money raised via congestion charging only be used to reduce road transport emissions in NI (33% believe it should be used for general NI expenditure)
- 33% believe that only those who will benefit directly from any new interventions to reduce road transport emissions should pay for these interventions (30% believe current road transport users should pay)
- 33% of consumers are willing to pay to reduce emissions from road transport in N Ireland (44% are not)
- 22% of consumers are willing to pay to reduce emissions from road transport in their local area (61% are not)

### Reducing car use in the short to medium term

- 22% say that improved service availability / routes to places consumers want to go is the most important thing that can be done in the short to medium term to encourage consumers to reduce their use of cars (cheaper fares, 16%: more frequent buses and trains, 12%)
- 29% say that cheaper fares is the most important thing that can be done in the medium term to encourage consumers to reduce their use of cars (availability / routes to places consumers want to go, 18%: more frequent buses and trains, 13%)

### Views of businesses in N Ireland

- 70% of business owners believe that businesses in towns and cities would be disadvantaged if the cost of carparking in towns and cities increased to deter consumers from travelling to towns and cities by car (68% of consumers agree)
- 65% of business owners agreed that discouraging people from bringing their cars into towns and cities would give a commercial advantage to out-of-town retail / shopping centres (64% of consumers agree)
- Just 28% of businesses agree that currently public transport is good enough to be a viable alternative to bringing your car into towns and cities in N Ireland (28% of consumers agree)

### Conclusions

This research shows that although the car continues to be the dominant mode of travel in Northern Ireland, a significant number of consumers are starting to think, plan or have already started using public transport for the first time. However, there are a range of actual and perceived barriers to greater use of public transport and these include living in a rural area, poor service availability, frequency and cost. Just a quarter of consumers say they are dependent on public transport, with consumers of the view that public transport in N Ireland needs to offer more flexible solutions to meet the needs of those engaged in more complex journeys.

General consumer sentiment is that it will be difficult to reduce their use of private cars and increase their use of public transport. Greater service frequency and accessibility to services were identified as key barriers to greater use of public transport, with free public transport the most likely factor that would motivate greater use of public transport.

Although most supported traffic calming measures to reduce the speed of traffic to accommodate other road users, as well as increasing the number of cycle lanes, there was less support for measures that would come at a cost to consumers (e.g. increasing taxation of petrol or diesel cars or increasing the cost of carparking to deter consumers from travelling to towns and cities by car). Only a minority of consumers supported congestion charging.

Although most consumers believe that investment in public transport in N Ireland is a priority, only a minority are willing to pay to reduce emissions from road transport in N Ireland. The common view is that either current users of road transport in N Ireland, or beneficiaries of new interventions to reduce emissions from road transport, should pay.

Consumers believe that increasing the cost of carparking and generally discouraging consumers from bringing cars into towns and cities, will negatively impact on the commercial fabric of towns and cities. Moreover, only a minority are of the view that currently public transport is good enough to be a viable alternative to bringing your car into towns and cities in N Ireland.

## 1. Introduction

In November 2022, The Northern Ireland Consumer Council commissioned Social Market Research (SMR) to undertake focus groups and a consumer survey on issues relating to decarbonisation and transport. This report presents the findings from this research.

### 1.1 Context and key strategic drivers

The Consumer Council as a non-departmental public body (NDPD) has a statutory duty to promote and safeguard the interests of consumers in Northern Ireland. Within this broader remit the Consumer Council have specific statutory duties in relation to energy, postal services, transport, water and sewage. Specifically, travel and transport services are important to all consumers in Northern Ireland. However, the sector is a key consumer of energy and has become the largest contributor to UK domestic greenhouse gas (GHG) emissions. In Northern Ireland, it accounts for 33% of energy consumed and 23% of GHG emissions.

The UK Government has developed a transport decarbonisation plan<sup>1</sup> that will seek to deliver net zero emissions across all transport modes by 2050 and has published Road to Zero<sup>2</sup>, a strategy aimed at “zero emissions from road transport by 2040”. Northern Ireland must contribute to UK commitments to decarbonise the road transport sector. Therefore a key focus within the Northern Ireland Energy Strategy<sup>3</sup> is the need to reduce emissions in the transport sector.

Northern Ireland is highly car dependent, with over 70% of all journeys made by car, and 82% of the total distance travelled per person is by car, while only one-quarter of journeys in Northern Ireland are taken by walking, cycling or public transport<sup>4</sup>. Therefore, reducing private car journeys is essential to reduce emissions and this requires action to change consumer behaviour.

As outlined in the consultation document on the Energy Strategy for Northern Ireland, an interventionist approach to transport and travel is required in order to shape choices to deliver behavioural change. There are a range of interventions and approaches that can be taken to increase active travel and public transport use in Northern Ireland. To identify the actions that are most likely to succeed in changing consumers behaviour policy makers must understand consumers views on how they travel and potential policy initiatives that aim to change it. This will be done by engaging with consumers directly.

The Consumer Council carries out primary and secondary research to understand the views and priorities of transport consumers in Northern Ireland. In doing so the Consumer Council has particular regard to those with a disability or chronic illness; of pensionable age; with low incomes; or who reside in rural areas. This research will be used to represent the views, and advocate on behalf of transport consumers to transport service operators, government departments and transport stakeholders.

In 2021 the Consumer Council carried out research on the ‘Future of Transport’ using six focus groups and a large scale quantitative survey of 1,124 consumers. This research helped develop the Consumer Council’s understanding of the consumers’ views and priorities for all aspects of the current and future transport systems in Northern Ireland. Although not focused on the decarbonisation of transport, the research highlighted that countering climate change is viewed by many consumers as not an individual’s duty but a responsibility of government and transport providers. It also found that as a result of the investments necessary to reduce carbon emissions, consumers expect the cost of transport to rise.

On 16 December 2021, the Department for the Economy published the Northern Ireland Energy Strategy - the Path to Net Zero Energy. This strategy recognises the need to reduce the greenhouse emissions produced by the transport sector in Northern Ireland. This current research builds on previous Consumer Council research and drills down further to understand consumers views on the decarbonisation of transport, the changes they may be asked to make and the policy interventions that aim to change how they travel.

<sup>1</sup> Decarbonising Transport – A Better, Greener Britain (publishing.service.gov.uk)

<sup>2</sup> The Road to Zero (publishing.service.gov.uk)

<sup>3</sup> The Path to Net Zero Energy. Safe. Affordable. Clean. (economy-ni.gov.uk)

<sup>4</sup> Travel Survey for Northern Ireland Headline Report 2016-2018 (infrastructure-ni.gov.uk)



## 1.2 Research aim

The overall research aim is to:

*'To develop an understanding of consumers' views and priorities on the decarbonisation of transport, the changes they may be asked to make and the policy interventions that aim to change how they travel in the future.'*

## 1.3 Research methodology

The research was based on two complementary elements: focus groups with consumers; and, a quantitative survey among a representative sample of NI consumers.

## 1.4 Focus groups

In advance of the quantitative survey, seven focus groups were conducted to explore and identify the key issues for consumers in relation to decarbonisation and transport. The focus groups were conducted first to help support the design of the survey questionnaire to be used in the quantitative survey. A total of 56 consumers participated in seven groups between 18 January and 2 February 2023, with the groups conducted remotely via ZOOM. Table 1 presents a profile of the focus group participants and shows that key factors such as gender, age, social class, area and disability were represented among those taking part. A focus group topic guide was designed in close consultation with The Consumer Council and a copy is attached as Appendix 1.

		%	n=56
Sex	Male	50	28
	Female	50	28
Age	16-34	25	14
	35-59	50	28
	60+	25	14
Social Class	ABC1	50	28
	C2DE	50	28
Area	Urban	68	38
	Rural	32	18
Disability	Yes	25	14
	No	75	42
Local Authority Area	Group 1: Belfast (Belfast LGD)	14	8
	Group 2: Belfast (Belfast LGD)	14	8
	Group 3: Enniskillen (Fermanagh and Omagh LGD)	14	8
	Group 4: Derry (Derry and Strabane LGD)	14	8
	Group 5: Causeway Coast and Glens LGD	14	8
	Group 6: Dungannon (Mid Ulster LGD)	14	8
	Group 7: Newry (Newry, Mourne and Down LGD)	14	8
Source: NI Census of Population (2021 mid-year estimates)			

## 1.5 Quantitative survey

The second element of the project involved the conduct of a large-scale quantitative survey of NI consumers. The aim of the survey was to quantify the issues emerging from the focus groups with the content of the survey questionnaire covering the following themes:

- Use of different types of transport
- Perception of public transport
- Barriers to using public transport more often

- Frequency, convenience and affordability of public transport
- Dependency on public transport
- Motivating greater use of public transport
- Interventions to discourage use of private cars in favour of public transport
- Willingness to pay to reduce carbon emissions from road transport including who should pay
- Attitudes towards congestion charging
- Short and medium term priorities to encourage greater use of public transport
- Commercial impact of decarbonisation policies to deter the use of private cars in towns and cities

A copy of the survey questionnaire is included as Appendix 2.

### 1.5.1 Survey methodology

The survey is based on 1034 interviews with the NI general public aged 18+. The survey was conducted using an online panel methodology with results representative of the NI adult population. The survey has a margin of error of +/-2.9% (at most). Fieldwork was conducted between 25 February and 10 March 2023. The research was conducted in line with ISO20252 of which Social Market Research is fully accredited.

### 1.5.2 Sample profile

Table 1.1 presents an overview of the sample profile weighted by age, sex, social class and area (LGD) and in line with census mid-year population estimates for 2021.

		Weighed Sample	
		%	n
Sex	Male	48	501
	Female	52	533
Age	18-34	27	277
	35-59	43	445
	60+	30	311
SEG <sup>5</sup>	ABC1	47	487
	C2DE	53	547
Local government district	Antrim and Newtownabbey Borough Council	10	101
	Ards and North Down	12	126
	Armagh City, Banbridge and Craigavon	9	92
	Belfast	18	186
	Causeway Coast and Glens	9	93
	Derry and Strabane	8	82
	Fermanagh and Omagh	7	68
	Lisburn and Castlereagh	9	88
	Mid and East Antrim	8	84
	Mid Ulster	5	50
	Newry, Mourne and Down	6	65

### 1.5.3 Notes on survey reporting

Please note that due to rounding, row and column totals in tables and figures may not sum to 100. Also, please note that any differences between sample subgroups (e.g. age, gender, social class etc.) alluded to in the report commentary are statistically significant to at least the 95% confidence level. The use of [-] within tables denotes less than 1%. Prior to analysis the data have been weighted by age, sex, social class, and local government district, and in line with NI census estimates.

<sup>5</sup> Used as an indicator of social class with ABC1 grades including: higher managerial, administrative or professional; intermediate managerial, administrative or professional; and, supervisory or clerical, junior managerial, administrative or professional. C2DE social grades include: skilled manual workers; semi and unskilled manual workers; and, state pensioners or widows (no other earner), casual or lowest grade workers.

## 2. Findings from the focus groups

### 2.1 Reducing the number of private cars in towns and city centres

#### Agreement on reducing the number of cars

Most of the focus group participants agreed that reducing the number of private cars in towns and city centres is a good way of reducing carbon emissions. Most of the comments were from a clean air perspective.

*"I do a lot of running and I have to avoid main roads because of the pollution."*

*"I think it has been fairly well proven that removing cars reduces emissions."*

Some would like to see fewer cars in town and city centres and more priority and space given to pedestrians and cyclists.

*"There is too much traffic because there are too many roads to drive on and not enough pedestrianisation space."*

*We definitely have to reduce the number of cars. Buses too, if they are pumping out emissions."*

#### Car trips are often complex

Some participants said that reducing the number of cars is fine in principle, but public transport does not provide an alternative because their journeys are spontaneous or complex. These participants said that they often undertake multiple stop-offs within a trip to work, for example, a school run, visit a relative, do the shopping, go to work and repeat in reverse. This, they argued is difficult to do with public transport.

*"People have to make multiple trips; go to work, leave kids to school, do shopping and so on. We are not just taking a trip from A to B, we are going via Y and Z on the way."*

*"I agree with reducing the number of private cars in towns and cities to bring emissions down, but people have very busy lives and sometimes need to go somewhere at the drop of a hat, you don't always have the luxury of time to plan a public transport trip, wait for a bus etc."*

*"Public transport does not work so well for families and all the paraphernalia that you have to bring with you, buggies and bags and so on."*

### 2.2 The best ways of reducing congestion in towns and cities

#### Better public transport needed

Almost all agreed that, where journeys are from A to B, public transport should play a role in reducing congestion. However, they argued that public transport services need to be more convenient, environmentally friendly and cheaper. Participants also said that public transport should run more flexible routes, criss-crossing main routes so that you don't have to go into town and back out again to reach a cross-town destination.

*"If you are making a straightforward A to B trip or normal nine to five commuting, public transport should be made a viable alternative, but it needs to be cleaner, greener, cheaper and on time"*.

*"Town buses to do local drop offs would be good on a continual and frequent loop that goes into estates and criss-crosses the main routes."*

*"Buses are the obvious answer, but they must be greener if we are to move out of our cars."*

### We need to look for wider and more holistic solutions

Some participants thought that transport and congestion issues should be addressed with a holistic approach that takes into account related phenomena such as home working and school runs.

*"If we encouraged more homeworking we could reduce the number of cars commuting in the first place."*

*"We need a holistic joined up view from planners and policy makers, reducing congestion should be part of repurposing town centres."*

*"When schools are off the number of cars reduces dramatically, so maybe there needs to be a way of reducing the school runs, car sharing and so on."*

### 2.3 The benefits and detriments of these potential measures

- Congestion charging
- Banning or charging driver only cars during peak hours
- Allowing electric vehicles to use bus lanes
- Specific days of the week for using a car in towns
- Banning cars when pollution levels reach a set limit

### We will probably just pay congestion charges and keep on using our cars

Around half of the focus group participants said they would absorb congestion charges into their travel budgets and keep on using their cars. Some argued that congestion charges should not be prohibitive so that when they really needed to use their car they could still afford to do so.

*"Congestion charging won't work. In the end we will all just pay up to use our cars. The government might raise money on congestion charging, but it won't change our driving habits."*

*"We would probably just incorporate congestion charges into our daily expenses and still take the car."*

*"Just banning cars won't work, sometimes you have to go into town, so we need the option to pay if we have to use our cars."*

*"Don't take away our choice by banning things. To discourage us from driving by bringing in a congestion charge is fine, but make it affordable and then we can decide to pay or not."*

### Alternative services and infrastructure need to be put in place before any charges are brought in

Before congestion charges are brought in, the alternative transport solutions must be in place. Participants thought that investment was needed to make public transport better before they are "forced" on to buses and trains. Key workers and those who need their vehicles for business need to be protected against charges.

*"The infrastructure must be in place for alternatives before things like congestion charging are brought in. None of these measures will make any difference to me until proper infrastructure is put in place."*

*"You can't force us out of our cars until you provide us with viable alternatives."*

*"Bus lanes are not optimised, we need more buses in those lanes, more services if you want us to leave our cars at home."*

*"I am a key worker, so paying to use my car on a daily basis would be ridiculous."*

## 2.4 Congestion charging

- **Q. If there is extra income raised from congestion charging or from extra parking charges, what should the money be used for?**
- **Q. Would you support ring fencing this money for transport decarbonisation measures e.g. to fund lower public transport fares?**

### High level of support for keeping the money within transport

If money is raised from congestion charges, almost all focus group participants said that it should be kept within Northern Ireland and spent on better public transport.

*“Any income raised should go back into economy for transport and fixing roads.”*

*“If it goes into a central pot who knows where it ends up, it needs to be kept aside for cheaper and more frequent transport.”*

*“Every road into Sydney Australia has a toll charge which is good, but all children’s transport is free so the money does go back into transport and people get that.”*

## 2.5 The benefits and detriments of these potential measures

- **Reduce the width or number of vehicle lanes to accommodate cycle lanes**
- **Pedestrianise roads**
- **Install speed bumps or other traffic calming measures**
- **Introduce and strictly enforce 15 or 20 mph speed limits**
- **Reversible lane systems during morning and evening peak travel hours**

### Slowing cars down or narrowing lanes will not work

Whilst focus group participants could see the value of traffic calming measures for safety purposes, they did not think they were a useful solution for congestion. Some also pointed out the slowing cars down can increase emissions if cars are travelling in lower gears.

*“I don’t see that narrowing lanes or making us go slower would work, you still have to make the journeys to leave the kids to clubs and pick them up.”*

*“I agree with speed bumps regarding safety, but if you go at a slower pace it can increase 3<sup>rd</sup> gear pollution.”*

*“Speed bumps are not a solution to congestion; they damage your car and keep you in low gears.”*

### Arguments against favouring cyclists

There were differing opinions on measures to support cycling, but most motorists were not in favour of reducing the number of vehicle lanes to accommodate more cycling lanes. Most of the cyclists in the focus groups cycled for fitness or pleasure and not for commuting.

*“Are there enough cyclists to warrant narrow lanes for cars or improved cycle lanes? I am not so sure.”*

*“I cycle, but I would not cycle in town, you couldn’t carry the things you bought.”*

*“I would not use my bike in Belfast it’s not safe.”*

### In support of pedestrianisation and a holistic approach

There was support for the pedestrianisation of town and city centres. Some saw this as a move towards repurposing the centres of town and cities, making them primarily places of leisure and entertainment.

*"I am a big supporter of pedestrianizing towns and cities; vehicles don't belong there unless they are essential services."*

*"Pedestrianisation should be part of repurposing town centres, transport is only one aspect of this. Creating better spaces for leisure in town and cities should be a priority."*

*"There are a lot of advantages to pedestrianisation, changing the nature of towns and cities for the better, cafes and restaurant spilling out onto the pavement and road."*

*"The future of Belfast city centre is for leisure and socialising."*

### 2.6 Reducing the number of cars parked in towns / city centres is a good way of reducing carbon emissions

- To what extent do you support this statement?
- How should we make it happen?
- How will this affect you?

#### Negative impact on town centre businesses

Participants said that introducing car parking restrictions, reducing the number of places available or charging more would result in fewer people bringing private vehicles into towns and cities. However, most said that this would be to the detriment of businesses in town centres and that they would be likely to go to out of town retail centres instead.

*"Fewer cars will mean fewer emissions, but could mean that fewer people go into town, the footfall lowers and there is a negative impact on business and retail in particular."*

*"If car parking charges go way up, I'll just go to the Abbey Centre instead. You can get nearly everything there anyway."*

### 2.7 What are the benefits and detriments of these potential measures?

- Increase Park & Ride provision
- Restrict Park & Ride to public transport users only
- Increase parking and costs in town centres
- Enhanced car parking at public transport stations and hubs
- Better/ more park and ride and car sharing infrastructure
- Allow business to use roadways for catering or sale of goods

#### High level of support for developing and improving Park and Ride

There was almost universal support in the focus groups for developing Park and Ride. Participants said that there should be Park and Ride facilities on the outskirts of all towns and cities, with cheap and green shuttle services into and back out of the centre.

*"Park and ride just outside towns would be good if you could transfer to a green option to take you into the centre."*

*"We don't have park and ride in Enniskillen or Omagh to get into the towns, but they'd be a great idea."*

*"Use electric shuttle buses or trams to go backwards and forwards to Park and Ride."*

Many thought that Park and Ride should be available for car sharing purposes and for those who want to leave their car there and travel onwards by bicycle.

*“Park and Ride should be available for car share as well. We could meet up there and just take one car into the town.”*

*“You should be able to drive in with your bike on the bike rack, park up and cycle the rest of the journey.”*

Some commented on the incentives needed to get people to come into existing Park and Ride instead of driving on by.

*“The cost of park and ride would need to be minimal for people to do the calculation and come out on the side of public transport rather than use the car.”*

*“Use incentives for park and rides. Could you make them free on Saturdays and Sundays?”*

*“Incentivise people with free or cheap park and ride so that they think twice about driving past and come into the Park and Ride instead.”*

*“You could give vouchers for Burger King or McDonalds to people who use Park and Ride, maybe those companies could financially support a scheme like that.”*

Some added that Park and Ride schemes need to have good security and good lighting. They also should stay open late with shuttle buses continuing to run at night.

## 2.8 We have to develop public transport to make it an attractive alternative to private car use

- **To what extent do you support this statement?**
- **How will this affect you?**

According to participants, public transport needs to be developed to be:

- **Cheaper**
- **Cleaner**
- **More comfortable**
- **More convenient in terms of proximity to stops and stations**
- **More frequent**
- **More flexible in terms of cross-city routes**
- **Safer, especially at night**

*“Cleanliness of buses is a big thing for me. If I am going to share a space with people I don’t know, I want it to be clean.”*

*“Bus shelters need to be more comfortable and safe, especially if you are waiting for a bus alone at night.”*

*“It’s all about convenience. I use taxis, don’t want to walk in the rain and wait for a bus that does not come.”*

*“Because the way Belfast is constructed, you have to get a bus in and a bus out again, so a journey that would be 30mins by car can take two hours. We need (additional) smaller buses that cross the city instead everything going in and out of the centre.”*

Not everybody can switch to public transport and private cars or taxis will always be favoured for more complicated journeys. Participants argued that people should not be penalised by congestions charges if their work requires them to enter or cross towns and cities.

*“Some people will never be able to switch to public transport, tradesmen, some key workers, shift workers. Don’t penalise these people, but strongly encourage those who can use public transport to do so.”*

*"I couldn't imagine my life using public transport due to my complicated journeys; the school run, picking up a colleague, visiting my parents on the way home."*

## 2.9 Having to use public transport more often instead of using a private car

- **How can we change public transport to make it a more attractive travel option?**
- **How can we get people to buy into those changes?**

If people are persuaded or feel forced to use public transport more often, then those who fear for their safety will be aggrieved.

*"For me, there is an issue of safety, especially using it at night, waiting for it, getting on and off and then walking home, it does not feel safe as a woman to be in those situations. So if I am not allowed to use my car, I will always use a taxi rather than a bus."*

*"It is not just about the safety on board the bus. You brave the bus stop, then the bus and then you get off and have to walk home alone. The taxi solves all that."*

*"I do shift work at hospital and the time of my work don't fit, especially early and late shifts. But if it is not a work trip, I am happy to take the bus during the day but not at night."*

*"I have got the last train home and it is not safe, people have been drinking, there are fights, I prefer the safety of a taxi."*

Participants said that there is not a "one size fits all" solution to making public transport more attractive. The frequency of rural services, and services between major towns and Belfast, needs to be improved. Public transport needs to be flexible to people needs, rather than putting people to inconvenience by having to fit their journey needs around inflexible services.

*"We need services that run on cross town routes, not just in and out of Belfast. Public transport should match people's needs, not the other way round with people trying to match their lives to fit where the services are."*

*"Buses and trains don't work for everybody. Somebody here said about the buses all going into Belfast and back out again. Taxis are the answer to that, but there is a shortage of taxis, we need more and they should be electric, subsidise them to change to electric."*

*"We need better services to rural and coastal towns and we need smarter transport in Portrush and Portstewart in the summer to stop gridlocking."*

Public transport needs to be affordable for all, said participants. In times of economic stress, people calculate the cost of every journey before making a choice between modes of travel. To compete, and to balance any inconvenience caused by not taking the car, people think that public transport needs to be made the cheapest option.

*"It needs to be a reasonable cost; at the moment too expensive for ordinary people."*

*"If public transport is the same price as a taxi, people will use a taxi. If you make it more difficult for people to go into the city, they will go elsewhere."*

*"You need to make it really affordable and that means actually making it cheaper than running the car."*

*"I would have to calculate if it would be cheaper to take the kids in the car and pay for car park or if it would be cheaper to go on public transport. Add in the convenience of the car and you need to make public transport a lot cheaper for us to be tempted."*



## 2.10 Free or heavily subsidised fares in order to get more people onto public transport

- **How effective would this be compared to other measures?**
- **How would you fund that?**
- **Would you accept paying for public transport in some other way, such as a rates levy, in order to make it free at the point of use?**

Participants said that, whilst free or cheaper public transport would be welcome, other problems need to be sorted out first. Price, to them, is just one variable and free transport would still be unattractive if other issues such as convenience and safety are not addressed.

*“Convenience always trumps cost for me, so you need to make it more convenient first, then I will look at the cost and make the choice as to what is the most convenient and what is the cheapest.”*

*“We need to fix all the other things that are wrong first. I have free public transport, I don’t use it more often than before, the service is still poor, so making it free doesn’t really make any difference. Free, but poor quality is not necessarily attractive.”*

*“There is no point in just making it free, that would just mean crowded busses that are still not on time, still dirty, still don’t run late enough or at all on Sundays and still don’t take you where you need to go. Fix all those things first.”*

*“Free transport in Belfast still leaves you running into town and out again for cross town journeys. Have a better network of electric cabs, maybe Translink cabs, even if you had to pay a little extra for them.”*

## 2.11 Encouraging cycling will be an important part of decarbonising transport

- **To what extent do you support this statement?**
- **What would encourage you to take up cycling as a form of transport / cycle more instead of using the car?**
- **What are the main barriers to cycling as a form of transport?**

Most participants viewed cycling as a leisure activity rather than a transport choice. Even those who cycle frequently said that they would not contemplate cycling in towns and a bicycle is not a substitute for a car for most journeys.

*“I got a grant towards buying a bike, I used it once and the roads were too dangerous, so I have never used it since.”*

*“Not feasible for me and my young family to cycle and it is much too dangerous during rush hour.”*

*“When my work did the Bike to Work scheme, it was only the sports cyclists that took it up, the fitness people, no-one that I know of took up cycling because of the scheme.”*

*“Cycling is not for everybody or for every trip. It would be a difficult thing to encourage it as a viable alternative the car or public transport for most trips.”*

*“We need more cycle lanes for leisure, for use on good days; it might trickle into using it for work, but definitely not a replacement for commuting by car.”*

If people are to be encouraged to substitute cycling for motoring, then more thought needs to be put into how cycling interacts with public transport.

*“Cycling is good if you live near a town, but bikes cannot be put on buses for part of a longer journey.”*

*“We need more joined up thinking on bicycle lanes, bike parking, being able to put the bike on a bus or a train or being able to mix your journey, part by bike and part by car.”*

*“If you could drive to a park and ride and then hire a bike, that would be good.”*

*"You arrive at work all sweaty. Employers could be encouraged to provide showering facilities and maybe even a free breakfast. It's a case of going the extra mile to encourage people."*

## 2.12 Benefits and detriments of measures and ensuring good relationships between cyclists and motorists

Most participants said that it is a good idea to keep cyclists and motorists separate. One answer would be to create a physical barrier between cycle lanes and traffic lanes and between cycle lanes and pedestrian walkways. Some suggested that cycle routes should take alternative routes to main roads. Whilst these physical measures would help improve relationships between cyclists and motorists, participants thought there should be a campaign to improve awareness and to encourage mutual courtesy.

*"It would be better to have dedicated cycle lanes than cyclists riding two and three abreast. Safety for both cyclists and motorists is the main thing."*

*"We need good quality integrated bike lanes with smooth surface."*

*"There should be separate cycle paths away from traffic, not necessarily just at the sides of roads."*

*"There should be a road tax for cyclists, an ID plate on the bike, mandatory insurance and a test of proficiency."*

*"It would be a good idea to have physical barriers between cyclists and cars. Physical barriers would encourage more people to cycle."*

*"We need to go back to public information films about road courtesy, benefits of cycling, not using our cars so often."*

## 2.13 Willingness to pay

Most participants said that they are happy to pay more for public transport if it is improved.

*"The infrastructure, journey times, routes and frequency all need to be better if you are going to start charging people."*

*"Everything is so expensive, but in principle I would be willing to pay a little more."*

*"I'd be willing to pay a bit more if public transport was better."*

For some, however, the convenience of using their car trumps the cost.

*"Most of us will just take the pain, pay the money and go on as we did before with our cars."*

*"Comfort and convenience are the most important things. I'll just pay the charges; I'll not stop using my car."*

## 2.14 Summary

Consumers generally agree that there is a need to reduce congestion and to reduce carbon emissions in towns and cities. Transferring their journeys to public transport is the obvious answer for them, but many say that comfort, convenience, timetabling and safety need to be improved before they would consider using it instead of their cars. People with families who travel with buggies and childcare equipment do not see buses as a viable alternative to their cars and those whose journeys are complicated say that using public transport to get from A to B via C and D would be challenging.

The complexity of people's journeys is an issue that came up again and again in the focus groups. Consumers thought that planners need to take into account that most journeys are not straightforward A to B. Furthermore, many people want to travel across town or across their city and taking a train or bus into the centre and back out again is inconvenient and costly.

There are some consumers who say that the convenience of using their car will always trump other forms of transport. These consumers are likely to pay congestion charges and not change their private car usage. If money

is raised from congestion charging, there is a strong view amongst consumers that it should be kept within Northern Ireland and used to improve public transport.

Consumers said that, whilst congestion charging and restriction on parking might decrease the number of cars in towns and cities, it could have a negative impact on business and commerce.

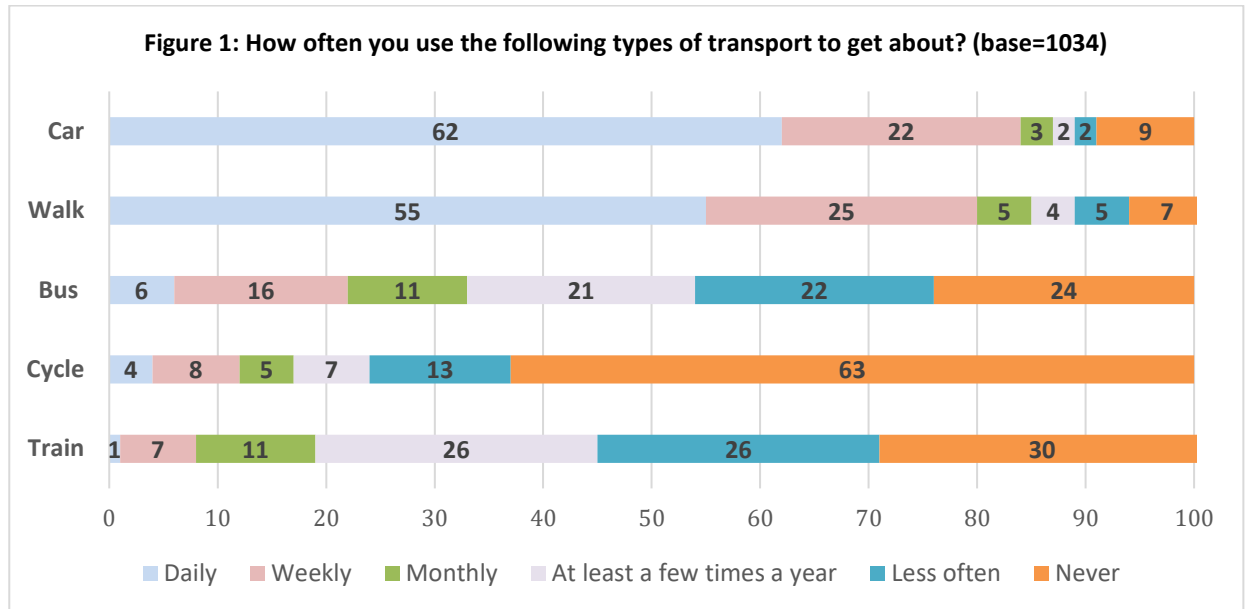
Cycling was viewed by members of the focus groups as being a leisure activity. They thought that it would be a good idea to separate cycle lanes from cars and from pedestrians but did not think this would necessarily encourage commuting by cycle. Some could see the benefit of being able to cycle into town having parked their cars at a Park and Ride. Indeed, improved Park and Ride was seen by focus group participants to be the easiest way to reduce the number of cars going into towns and cities, with cheap and environmentally friendly shuttle services operating into and back out of the centre. However, security and lighting need to be improved at some Park and Ride schemes and they need to stay open late with shuttle buses continuing to run at night.

### 3. Survey findings

#### 3.1 Use of different forms of transport

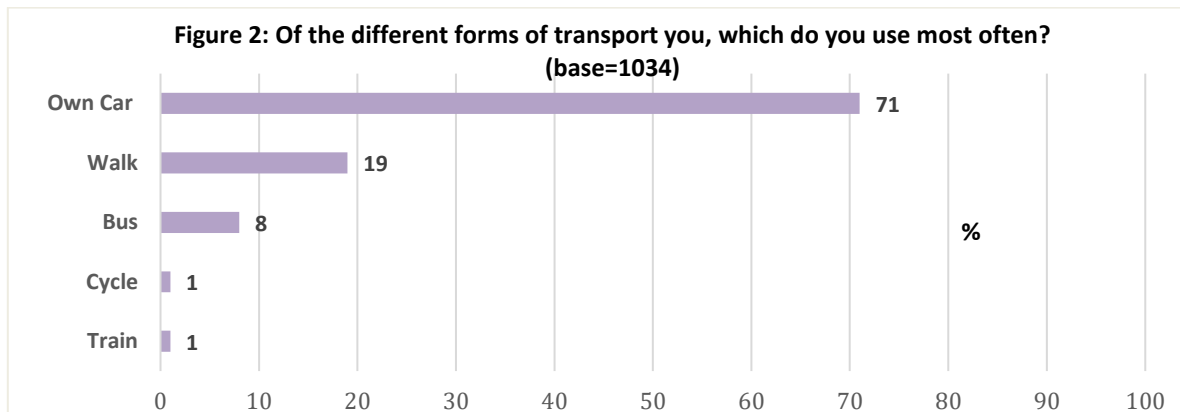
Respondents were asked about different forms of transport they use to get about.

Figure 1 shows that 62% of consumers use a car on a daily basis, 55% walk on a daily basis with relatively few consumers using a bus (6%), cycling (4%) or using a train (1%) on a daily basis.



##### 3.1.1 Type of transport used most often

Figure 2 shows that consumers said they most often use a car to get about (71%), with 19% walking, 8% by bus, 1% cycling and 1% most often get about by train.



There were a number of statistically significant differences between different consumer groups:

Consumers who **most often use a car to get about** included:

- Older consumers (16-34, 63%; 35-59, 71%; 60+, 78%)
- Those in higher social grades (abc1, 79% vs. C2de, 64%)
- Those with a higher level of educational attainment (low, 60%; medium, 70%; high, 79%)
- Economically active consumers (75% vs. 61%)
- Those living in rural areas (84% vs. 66%)
- Higher income consumers (<=£20K, 61%; 20K-£40K, 74%; £40K+, 85%)

Consumers using **alternative means of transport other than a car** included:

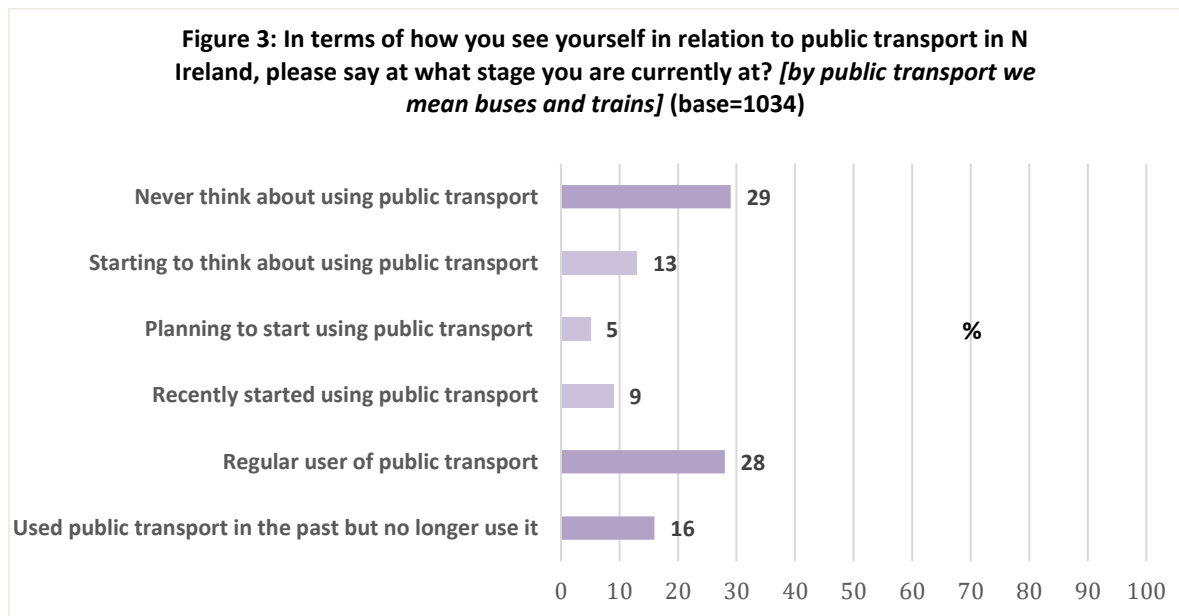
- Younger consumers (16-34, 37%: 35-59, 29%: 60+, 22%)
- Those in lower social grades (abc1, 22% vs. C2de, 36%)
- Those with a lower level of educational attainment (low, 40%: medium, 30%: high, 21%)
- Economically inactive consumers (39% vs. 25%)
- Those living in urban areas (34% vs. 16%)
- Lower income consumers (<=£20K, 39%:20K-£40K, 26%: £40K+, 15%)

### 3.2 Use of public transport (buses and trains) and stages of change

Consumers were asked to say where they see themselves in relation to public transport in N Ireland and at what stage they are at in terms of using public transport.

Figure 3 shows that almost three out of ten (29%) consumers have never thought about using public transport, with 13% starting to think about using it and 5% planning to do so.

Almost one in ten (9%) say they have recently started using public transport and 28% are regular users of public transport. Sixteen percent (16%) have used public transport in the past but no longer do so.



**There were a number of statistically significant differences.**

Those more likely to say they **never think about using public transport** include:

- Men (32% vs. 26%)
- Economically active consumers (30% vs. 25%)
- Non-disabled consumers (31% vs. 23%)
- Those living in rural areas (39% vs. 25%)
- Those who most often use their car to get about (35% vs. 14%)

Those more likely to say they have **used public transport in the past but no longer do** include:

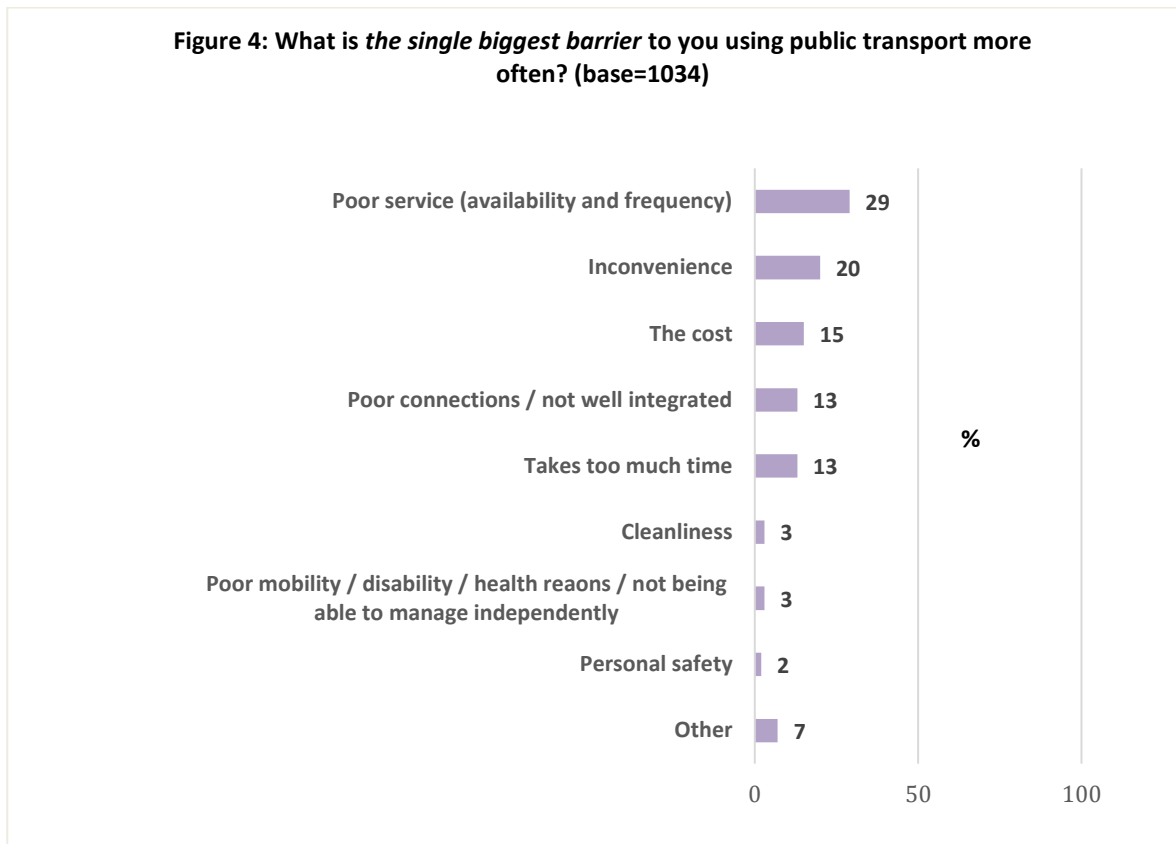
- Women (20% vs. 12%)
- Those in higher social grades (ABC1, 20% vs. C2DE, 12%)

Those more likely to say they are **starting to think about using public transport** include:

- Economically active consumers (16% vs. 7%)
- Higher income groups (<=£20k, 12%:20k-£40k, 12%: £40k+, 18%)
- Those who most often use their car to get about (16% vs. 8%)

### 3.3 Barriers to using public transport more often

Poor service (availability and frequency) was listed by 29% of consumers as the single biggest barrier to using public transport more often, with 20% citing convenience and 15% citing cost. Other barriers included: poor connectedness (13%), time consuming (13%), cleanliness (3%) and personal safety (2%).



Seven percent of consumers cited other barriers which included: anxiety and being too close to people (n=3); distance to get to a bus station (n=1); comfort (n=1); don't need it / don't need to travel (n=3); doesn't suit work times (n=1); don't know the details of the services (n=1); drive for a living (n=1); free bus pass (n=2); don't like using public transport (n=1); have access to a car (n=2); live in a rural area and inconvenient (n=1); need vehicle for work (n=1); inconvenient when doing school runs (n=1); lack of parking at stations (n=2); limited rail network (n=2); travel to multiple work sites (n=1); need to transport goods as part of job (n=1); there are no barriers (n=8); prefer to walk (n=1); poor public transport infrastructure particularly in rural areas (n=1); risk of infection (n=1); lack of services near to me (n=1); trains too busy (n=1); and, work from home (n=2).

#### There were a number of statistically significant differences.

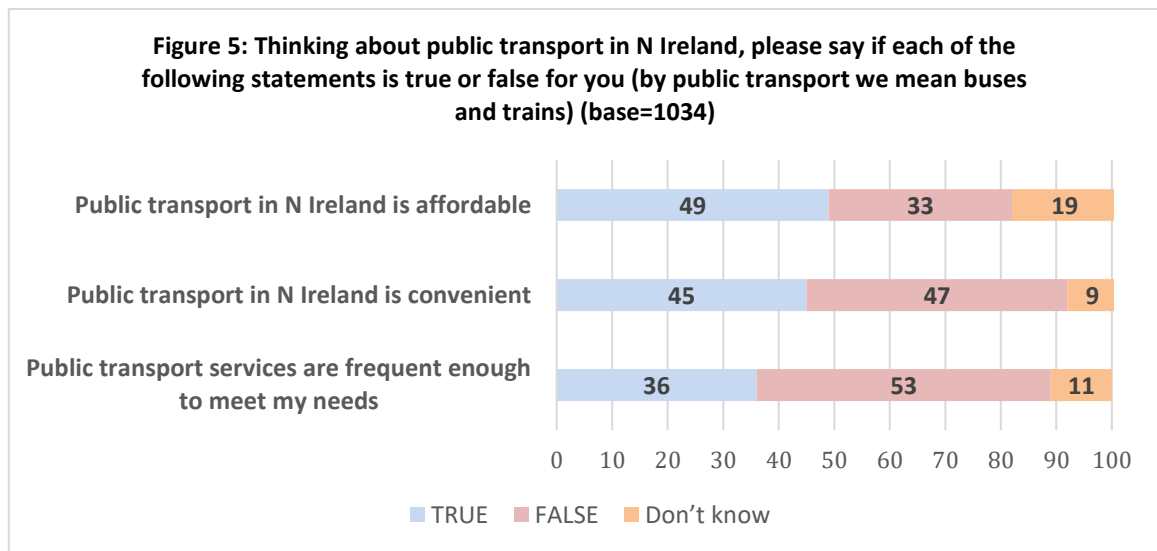
- Younger consumers were more likely to say that public transport takes too much time (16-34, 17%; 35-59, 13%; 60+, 8%) whereas older consumers were more likely to cite poor service (16-34, 23%; 35-59, 27%; 60+, 36%)
- Higher social grades were more likely to list poor connections / poor integration as the single most important barrier (ABC1, 17%; C2DE, 9%)
- Those living in rural areas were more likely to cite poor service availability / frequency as the biggest barrier (42% vs. 23%), whereas those in urban areas were more likely to say that cost is the single biggest barrier to using public transport more often (17% vs. 11%)
- Those who most often use their car to get about were more likely to cite inconvenience (22% vs. 15%), whereas those using alternative forms of transport were more likely to cite cost (27% vs. 10%) as the single biggest barrier

### 3.4 Frequency, convenience and affordability of public transport

Consumers were presented with a number of statements on the frequency, convenience and affordability of public transport and asked if they believed each to be true or false.

Figure 5 shows that just under half (49%) of consumers believe that public transport is affordable, 33% do not and 19% are undecided. A similar number said that public transport in N Ireland is convenient (45%), with 47% saying that public transport is not convenient and 9% were undecided.

Approximately one in three (36%) consumers believe that public transport services are frequent enough to meet their needs, with most disagreeing (53%). Eleven percent were undecided.



Those **less likely to say that public transport services are frequent enough** to meet their needs included:

- Those in higher social grades (ABC1, 58% vs. C2DE, 49%)
- Consumers with a higher level of educational attainment (low, 45%: medium, 47%: high, 63%)
- Economically active consumers (55% vs. 49%)
- Those living in rural areas (70% vs. 47%)
- Relatively higher income groups (<=£20K, 46%:20K-£40K, 58%: £40K+, 59%)
- Those who use their car most often to get about (60% vs. 37%)

Those **less likely to say public transport in N Ireland is convenient** include:

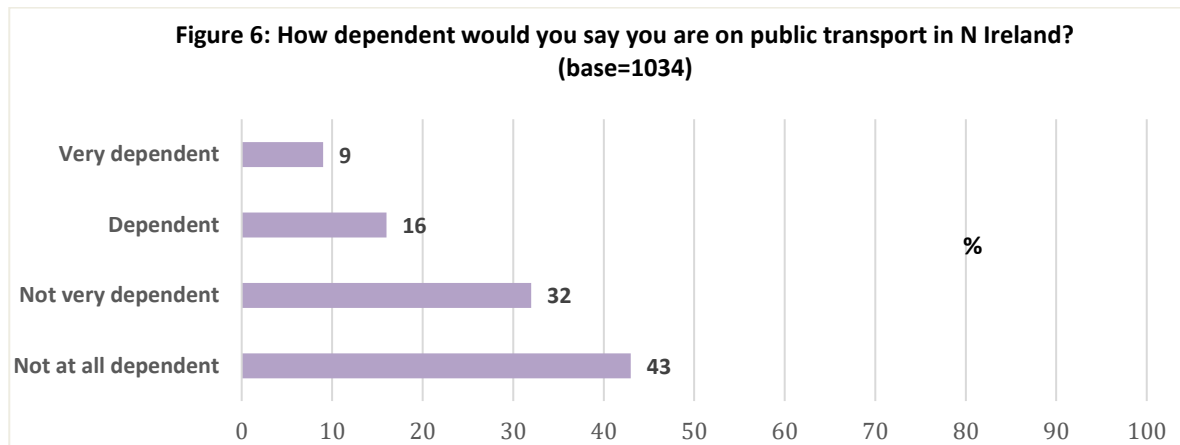
- Those in higher social grades (ABC1, 51% vs. C2DE, 43%)
- Consumers with a higher level of educational attainment (low, 40%: medium, 41%: high, 55%)
- Economically active consumers (51% vs. 39%)
- Non-disabled consumers (49% vs. 43%)
- Those living in rural areas (63% vs. 40%)
- Relatively higher income groups (<=£20K, 37%:20K-£40K, 53%: £40K+, 55%)
- Those who use their car most often to get about (55% vs. 28%)

Those **less likely to agree that public transport in N Ireland is affordable** include:

- Those aged under 60 (16-34, 44%: 35-59, 40%: 60+, 65%)
- Economically active consumers (37% vs. 24%)

### 3.5 Dependence on public transport

One in four (25%) consumers said they are dependent on public transport in N Ireland (very dependent, 9%: dependent, 16%). Most consumers said they are not dependent on public transport (not very dependent, 32%: not at all dependent, 43%).

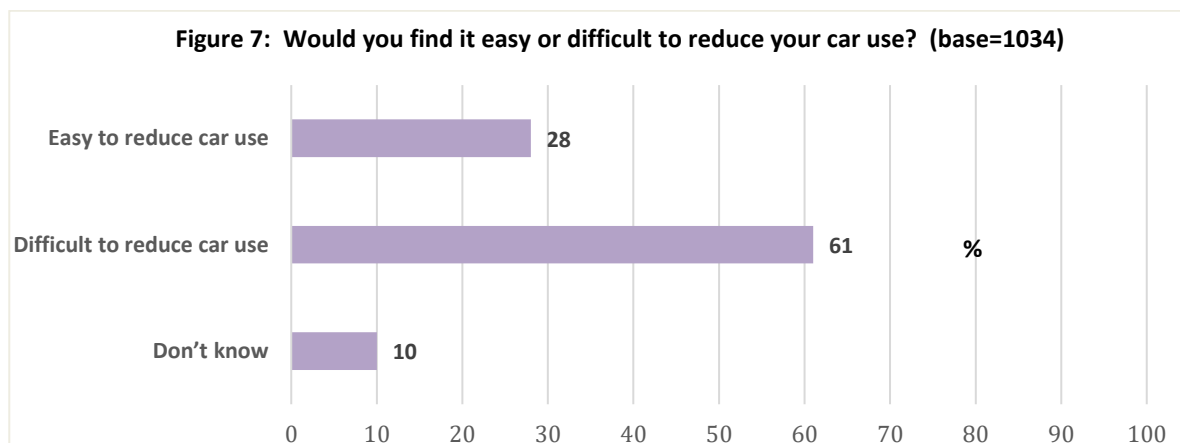


Those more likely to say they are dependent on public transport included:

- Younger consumers (16-34, 33%: 35-59, 25%: 60+, 18%)
- Those in lower social grades (ABC1, 22% vs. C2DE, 28%)
- Consumers with a lower level of educational attainment (low, 32%: medium, 26%: high, 19%)
- Those with a disability (30% vs. 23%)
- Those living in urban areas (29% vs. 14%)
- Lower income groups (<=£20K, 32%: 20K-£40K, 19%: £40K+, 22%)
- Those who use alternatives to a car to get about (56% vs. 12%)

### 3.6 Reducing car use

Most consumers (61%) said that it would be difficult to reduce their car use, with just over a quarter (28%) saying it would be easy. Ten percent were undecided.



Those more likely to say they would find it difficult to reduce their car use included:

- Those in higher social grades (ABC1, 65% vs. C2DE, 58%)
- Consumers with a higher level of educational attainment (low, 51%: medium, 57%: high, 72%)
- Economically active (65% vs. 53%)
- Those living in rural areas (78% vs. 55%)
- Higher income groups (<=£20K, 50%: 20K-£40K, 66%: £40K+, 75%)
- Those who most often use a car most to get about (78% vs. 21%)



### 3.6.1 Reasons why consumers would find it difficult to reduce their car use

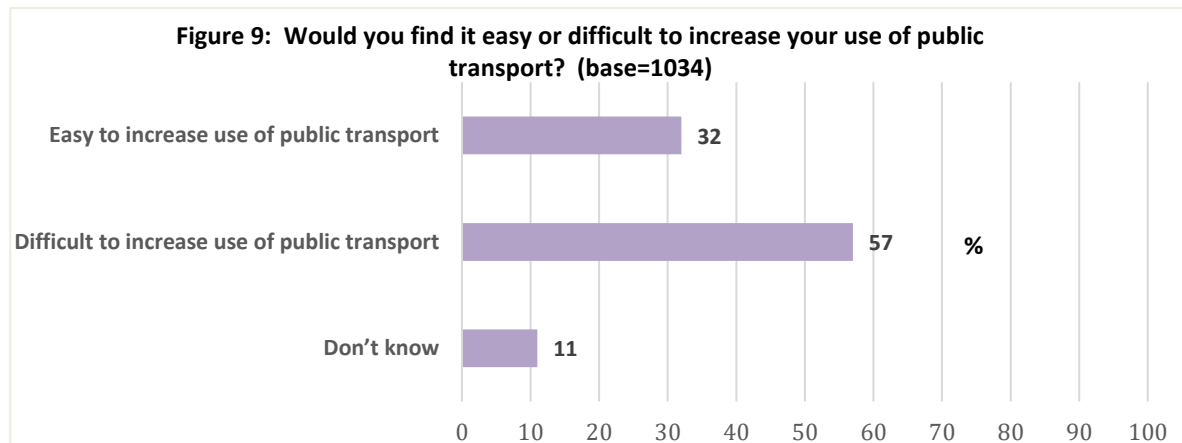
Those who said they would find it difficult to reduce their car use (n=635) were most likely to attribute this to living in a rural area with a lack of public transport nearby (25%).

Other common reasons included why consumers would find it difficult to reduce their car use included: greater convenience with a car (18%); disability / mobility issues (9%); a need to use a car for work (8%); and, poor frequency of bus / train services (8%).



### 3.7 Increasing use of public transport

More than half (57%) of consumers said that it would be difficult to increase their use of public transport, with approximately one third (32%) saying it would be easy. Eleven percent were undecided.



Those **more likely to say they would find it difficult to increase their use of public transport** included:

- Those aged 35+ (16-34, 49%: 35-59, 61%: 60+, 58%)
- Consumers with a higher level of educational attainment (low, 43%: medium, 57%: high, 65%)
- Economically active consumers (59% vs. 50%)
- Those living in rural areas (73% vs. 50%)
- Higher income groups (<=£20K, 50%: 20K-£40K, 61%: £40K+, 66%)
- Those who most often use a car get about (69% vs. 25%)

3.7.1 Reasons why consumers would find it difficult to increase their use of public transport

Those who said they would find it difficult to increase their use of public transport (n=585) attributed this mostly to poor frequency of bus / trains (20%). Other common reasons included: no stops nearby (15%); car offering greater convenience (12%); no public transport routes to where consumers want to go (10%); living in a rural area and lack of public transport (8%); and, issues relating to disability / mobility (8%).



3.7.2 Most important thing that needs to change for consumers to use of public transport more often

When asked to list the single most important thing that needs to change for consumers to use public transport more often, more frequent buses / trains (including more room / seats) was most commonly cited (22%), followed by greater service availability (18%), cheaper fares (15%) and having more accessible stops (10%).

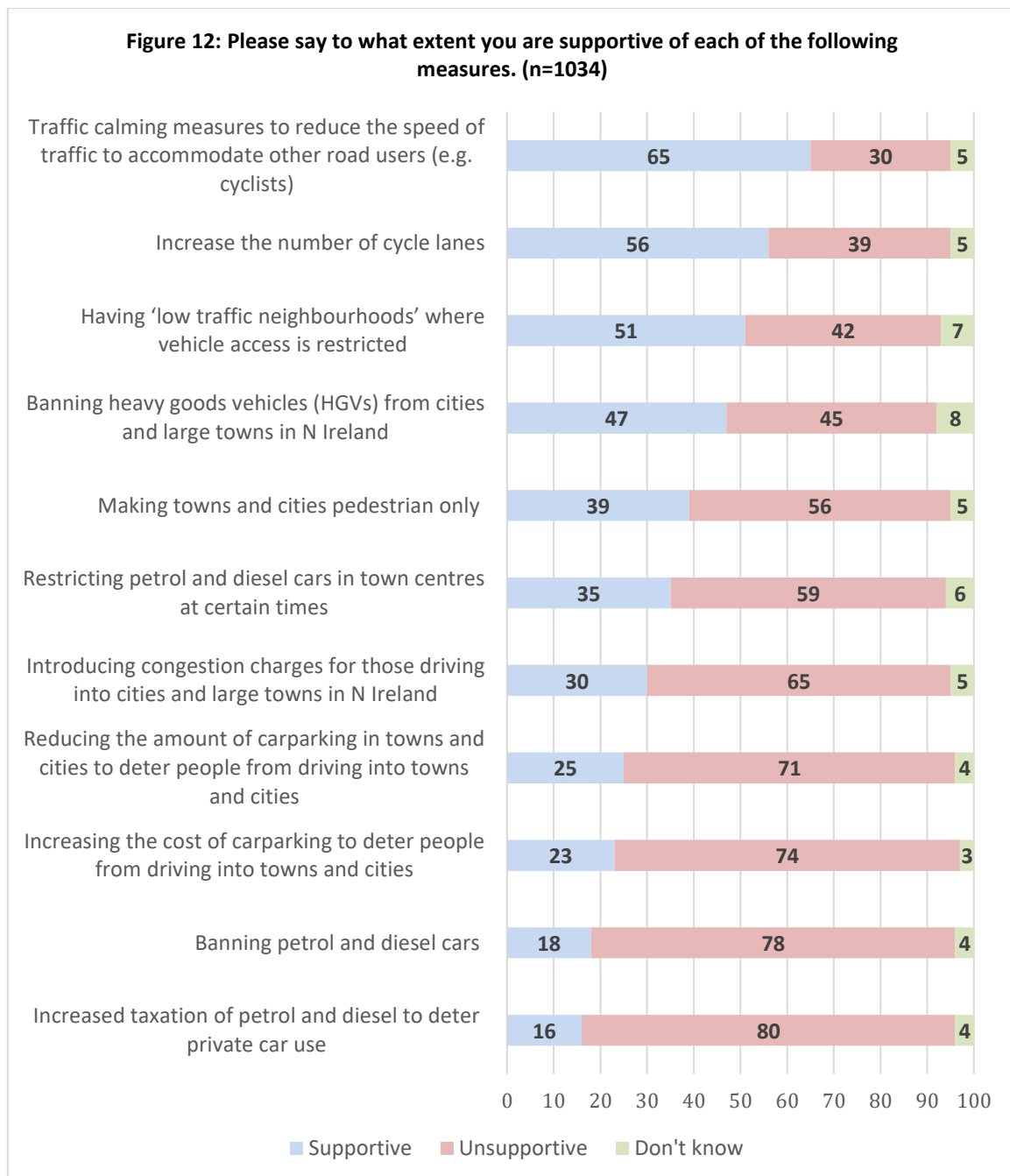


3.8 Public support for different interventions to reduce use of private cars

Because of the need to reduce road transport emissions the government and other authorities are keen to discourage use of private cars in favour of greater use of alternative forms of transport such as walking, cycling and public transport. There are different measures which can be introduced to discourage consumers from using private cars and the survey provided an opportunity to measure support for some of these potential measures.

Figure 12 shows that a majority of consumers are supportive of traffic calming measures to reduce the speed of traffic to accommodate other road users (65%), increasing the number of cycle lanes (56%) and having ‘low traffic neighbourhoods’ where vehicle access is restricted (51%).

Relatively lower levels of consumer support were recorded for increased taxation of petrol and diesel cars to deter private car use (16%), banning petrol and diesel cars (18%) and increasing the cost of carparking to deter people from driving into towns and cities (23%).



Statistically significant differences

### **Introducing congestion charges for those driving into cities and large towns in N Ireland**

- ABC1 consumers were more likely to be unsupportive (68%) [C2DE, 61%]
- Better educated were consumers more likely to be unsupportive (low, 55%: medium, 64%: high, 70%)
- Economically active were more likely to be unsupportive (66% vs. 62%)
- Non-disabled were more likely to be unsupportive (68% vs. 59%)
- Higher income groups were more likely to be unsupportive (<=£20K, 60%: 20K-£40K, 66%: £40K+, 73%)
- Those who most often use a car to get about were more likely to be unsupportive (73% vs. 45%)

### **Banning heavy goods vehicles (HGVs) from cities and large towns in N Ireland**

- Older consumers were more likely to be supportive (16-34, 46%: 35-59, 41%: 60+, 55%)
- Economically active more likely to be supportive (48% vs. 43%)
- Higher income groups more likely to be supportive (<=£20K, 42%: 20K-£40K, 49%: £40K+, 53%)

### **Increasing the cost of carparking to deter people from driving into towns and cities**

- Older consumers were more likely to be unsupportive (16-34, 69%: 35-59, 71%: 60+, 82%)
- Those who most often use a car to get about were more likely to be unsupportive (81% vs. 57%)

### **Reducing the amount of carparking in towns and cities to deter people from driving into towns and cities**

- Older consumers were more likely to be unsupportive (16-34, 65%: 35-59, 68%: 60+, 80%)
- Less well educated consumers more likely to be supportive (low, 32%: medium, 20%: high, 23%)
- Those living in urban areas are more likely to be supportive (27% vs. 19%)
- Those who most often use a car to get about were more likely to be unsupportive (80% vs. 48%)

### **Increased taxation of petrol and diesel to deter private car use**

- Women were more likely to be unsupportive (84% vs. 76%)
- Older consumers were more likely to be unsupportive (16-34, 72%: 35-59, 80%: 60+, 86%)
- Those living in urban areas are more likely to be unsupportive (85% vs. 77%)
- Those who most often use a car to get about were more likely to be unsupportive (87% vs. 62%)

### **Increase the number of cycle lanes**

- Men were more likely to be unsupportive (42% vs. 36%)
- Economically active consumers were more likely to be unsupportive (42% vs. 33%)
- Those who most often use a car to get about were more likely to be unsupportive (44% vs. 26%)

### **Traffic calming measures to reduce the speed of traffic to accommodate other road users (e.g. cyclists)**

- Women were more likely to be supportive (70% vs. 59%)
- Older consumers were more likely to be supportive (16-34, 60%: 35-59, 65%: 60+, 69%)
- Economically inactive consumers were more likely to be supportive (70% vs. 62%)
- Those who most often use a car to get about were more likely to be unsupportive (35% vs. 20%)

### **Having 'low traffic neighbourhoods' where vehicle access is restricted**

- Men were more likely to be unsupportive (46% vs. 39%)
- Economically active consumers were more likely to be unsupportive (44% vs. 39%)
- Relatively higher income groups more likely to be unsupportive (<=£20K, 36%: 20K-£40K, 46%: £40K+, 45%)
- Those who most often use a car to get about were more likely to be unsupportive (48% vs. 30%)

#### **Making towns and cities pedestrian only**

- Men were more likely to be supportive (42% vs. 36%)
- Better educated consumers were more likely to be unsupportive (low, 53%: medium, 55%: high, 60%)
- Economically active were more likely to be unsupportive (58% vs. 52%)
- Those who most often use a car to get about were more likely to be unsupportive (61% vs. 45%)

#### **Banning petrol and diesel cars**

- Men were more likely to be supportive (22% vs. 13%)
- Younger consumers were more likely to be supportive (16-34, 23%: 35-59, 17%: 60+, 14%)
- Those who most often use a car to get about were more likely to be unsupportive (83% vs. 67%)

#### **Restricting petrol and diesel cars in town centres at certain times**

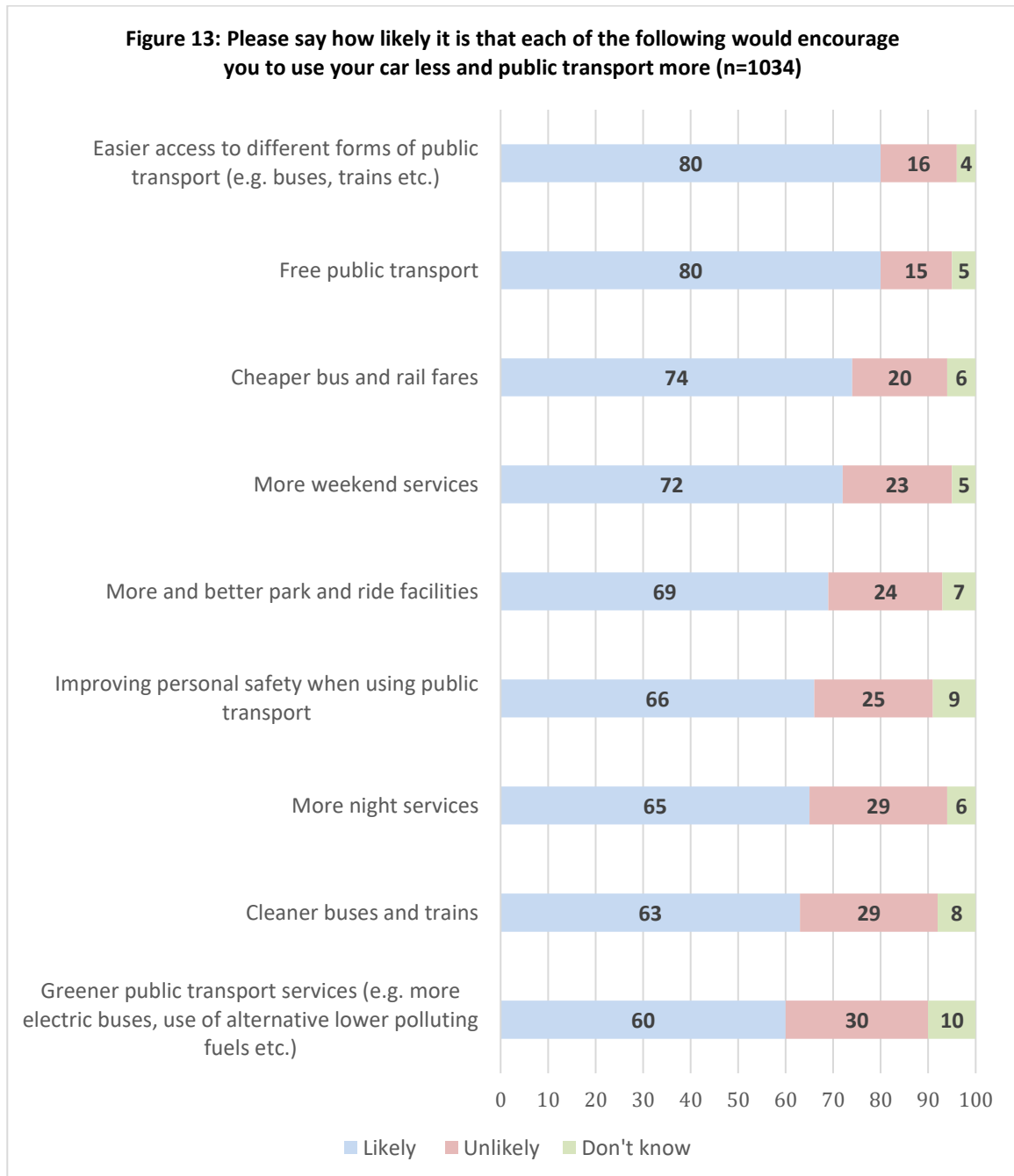
- Men were more likely to be supportive (37% vs. 32%)
- Relatively better educated consumers were more likely to be unsupportive (low, 55%: medium, 63%: high, 62%)
- Economically active consumers were more likely to be unsupportive (62% vs. 55%)
- Relatively higher income groups were more likely to be unsupportive (<=£20K, 57%: 20K-£40K, 61%: £40K+, 63%)
- Those who most often use a car to get about were more likely to be unsupportive (67% vs. 44%)

3.8.1 Factors that would encourage consumers to use public transport more

Encouraging more people to use their car less, and to use public transport more, is important in helping to reduce emissions from road transport in N Ireland.

Figure 13 shows that a consumers were more likely to say that the following would encourage them to use their car less and public transport more: easier access to different forms of public transport (e.g. buses, trains etc.) [80%], free public transport (80%) and cheaper bus and rail fares (74%).

Relative to other factors, fewer consumers said the following would encourage them to use their car less and public transport more: greener public transport services (e.g. more electric buses, use of alternative lower polluting fuels etc.) [60%], cleaner buses and trains (63%) and more night services (65%).



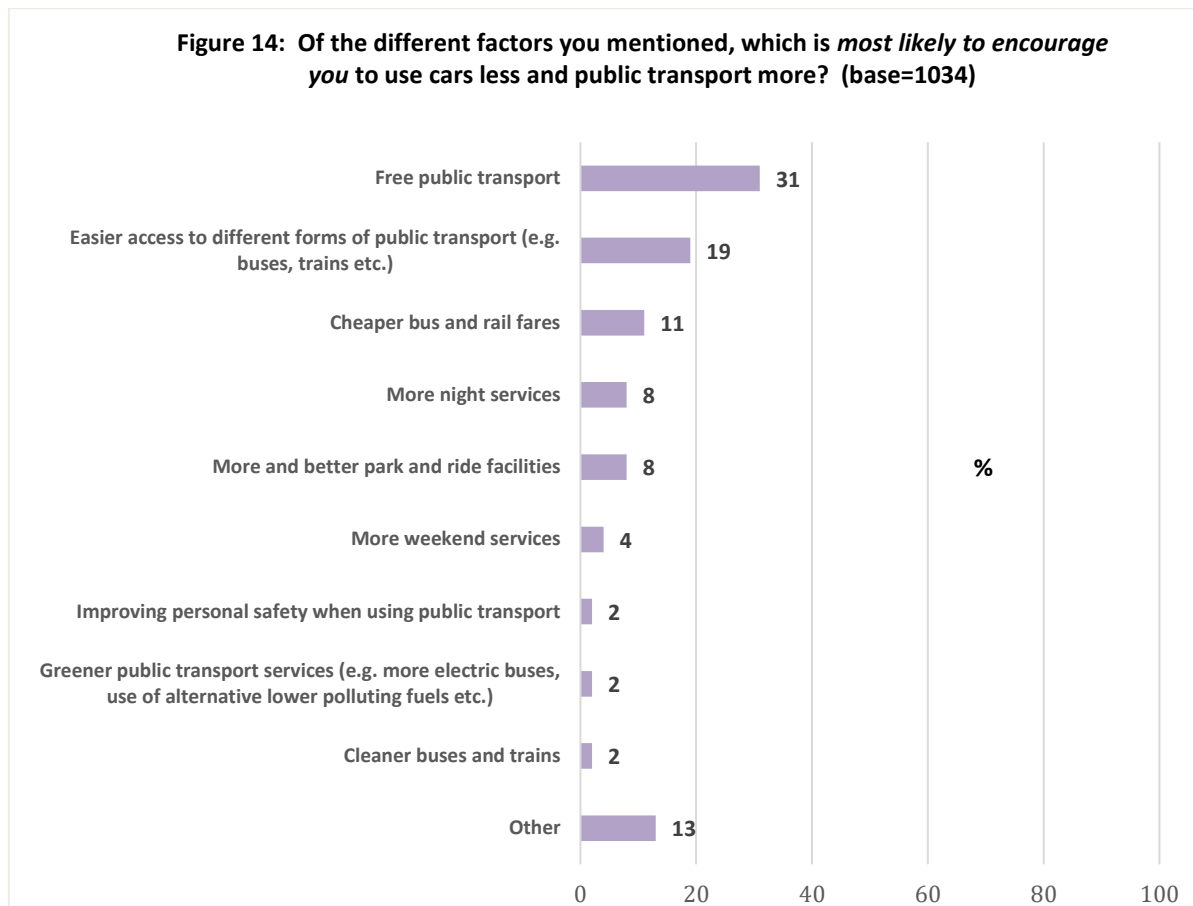


### 3.8.2 Factor most likely to encourage consumers to use public transport more

Having identified a range of factors which would encourage consumers to use their car less and public transport more, consumers were then asked to list the factor most likely to encourage them to use public transport more.

Figure 14 shows that 31% of consumers said the free public transport would encourage them to use their car less and public transport more, with 19% citing easier access to different forms of transport (19%) and 11% citing cheaper bus and rail fares.

Compared to other factors, greener buses and trains (2%), cleaner buses and trains (2%), and improving personal safety (2%), were less likely to motivate consumers to use their car less and public transport more.



Differences in terms of the most important factor that would encourage consumers to use cars less and transport more:

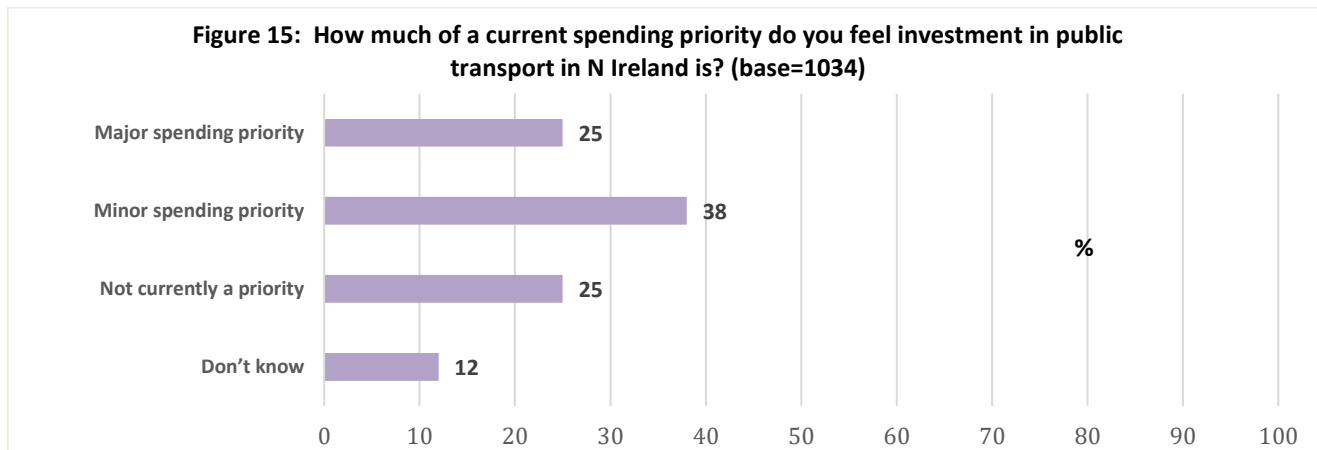
- Men were more likely to cite free public transport (36% vs. 26%)
- Women were more likely to cite easier access to different transport forms (23% vs. 14%)
- Younger consumers were more likely to suggest free transport (16-34, 42%; 35-59, 35%; 60+, 15%)
- Those aged 60+ more likely to cite different forms of public transport (16-34, 12%; 35-59, 18%; 60+, 25%)
- Those in rural areas more likely to suggest greater access to different forms of public transport (26% vs. 16%)
- Those who most often use a car to get about were more likely to suggest greater access to different forms of public transport (22% vs. 11%)

### 3.9 Investment in transport decarbonisation and willingness to pay

#### 3.9.1 Investment in public transport as a consumer priority

Developing the public transport infrastructure in N Ireland to encourage greater use and reduce emissions from road transport will require investment and come at a cost. Given this information, consumers were then asked to say how much of a priority current spending on investment in public transport in N Ireland is to them.

Figure 15 shows that most consumers (63%) believe that investment in public transport in N Ireland is a priority (major, 25%; minor, 38%), with one in four (25%) believing that it is not currently a priority. Twelve percent were undecided.



Those more likely to believe investment in public transport in N Ireland is a priority (major or minor) included:

- Men compared with women (65% vs. 60%)
- Economically active consumers (65% vs. 56%)
- Higher income groups (<=£20K, 61%; 20K-£40K, 62%; £40K+, 71%)
- Those who most often use an alternative to a car to get about (71% vs. 59%)

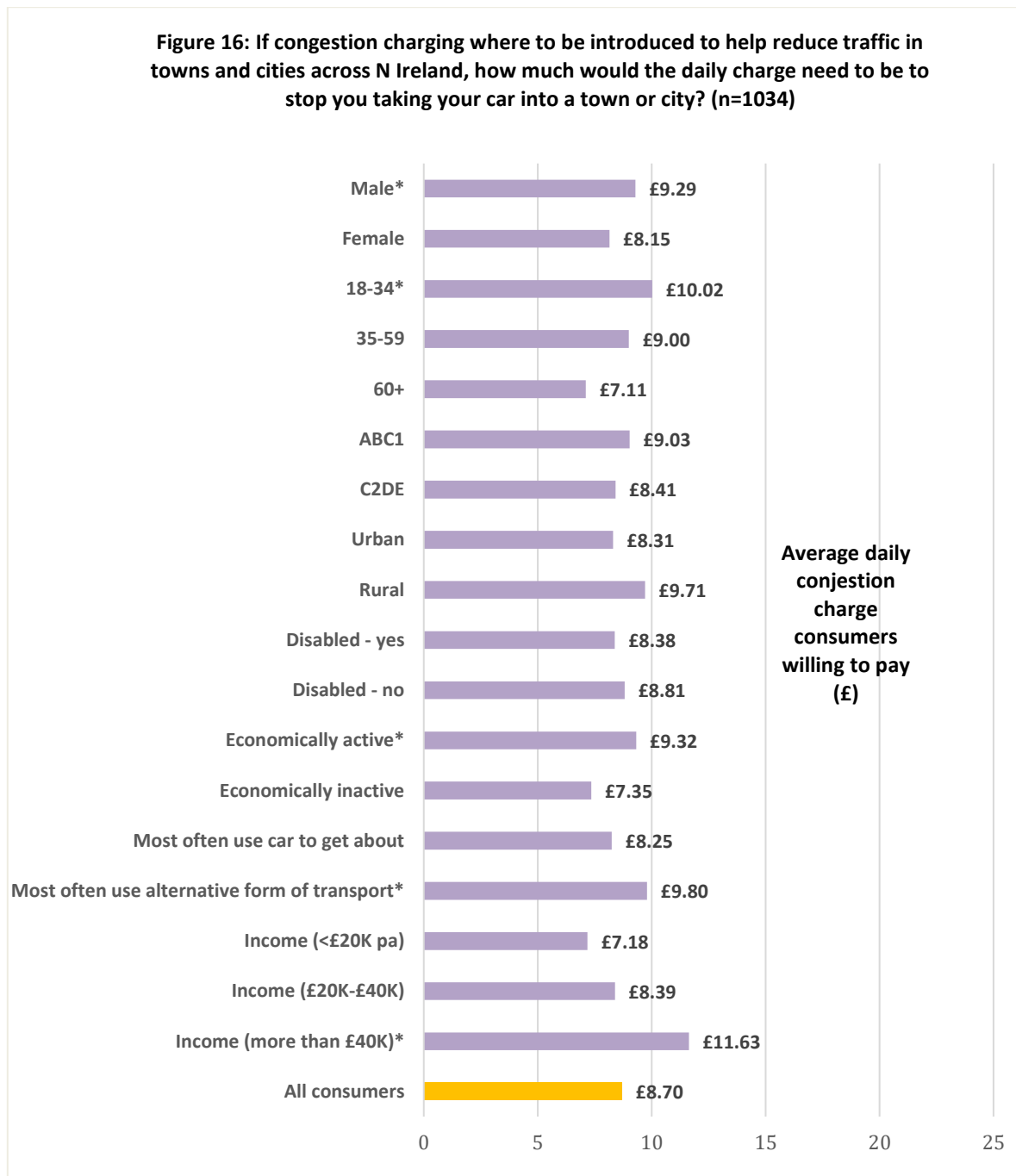
### 3.9.2 Maximum congestion charge to deter consumer from taking their car into a town or City

Consumers were asked if congestion charging were to be introduced to help reduce traffic in towns and cities across N Ireland, how much would the daily charge need to be to stop them taking their car into a town or city.

Figure 16 shows that the average maximum amount that consumers would be prepared to spend on a congestion charge is £8.70.

Younger consumers said they would be prepared to pay more on average (16-34, £10.02: 35-59, £9: 60+, £7.11), with economically active consumers also saying they would be prepared to pay more compared with economically inactive consumers (£9.32 vs. £7.35).

Higher income groups were also prepared to pay more (<=£20K, £7.18: 20K-£40K, £8.39: £40K+, £11.63), with those who most often use a car to get about paying less on average (£8.25 vs. £9.80).

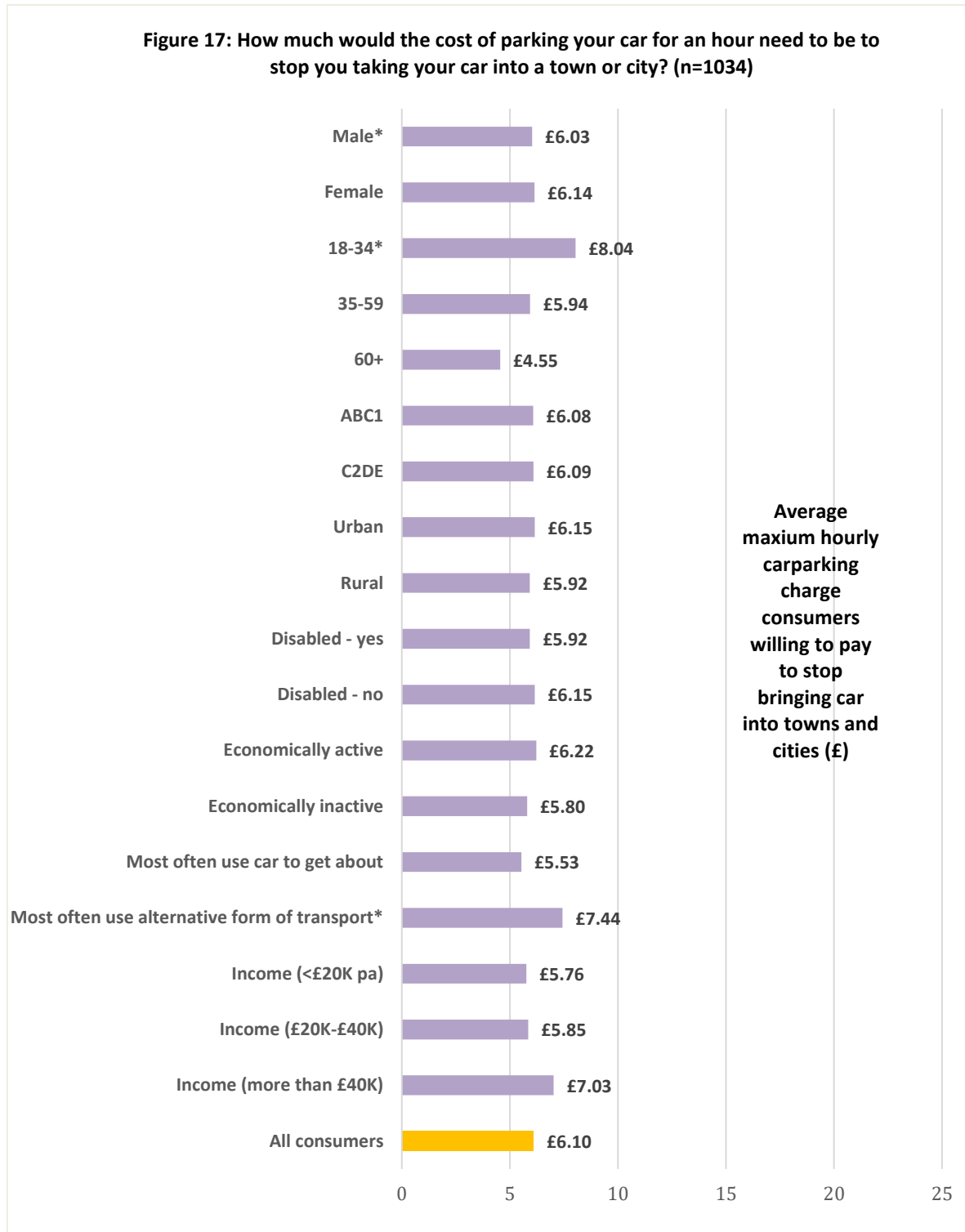


3.9.3 Maximum hourly parking rate to deter consumers from taking their car into a town or City

Consumers were also asked to say how much the cost of parking their car for an hour would need to be to stop them taking their car into a town or city.

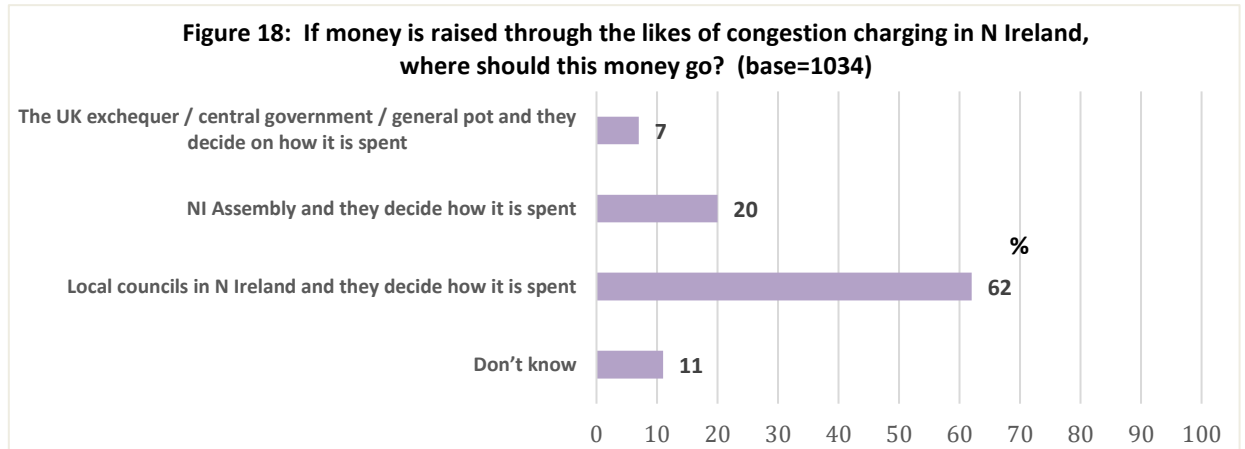
Figure 17 shows that the average maximum amount that consumers would be prepared to spend on hourly carparking is £6.10.

Younger consumers said they would be prepared to pay more on average to park their car (16-34, £8.04: 35-59, £5.94: 60+, £4.55), with those who most often use a car to get about saying they would be prepared to pay less compared with those who most use alternative forms of transport (£5.53 vs. £7.44).



### 3.9.4 Money raised through congestion charging

Consumers were asked where they believe money raised through the likes of congestion charging in N Ireland should go. Figure 18 shows that most consumers (62%) believe that this money should go to local councils in N Ireland and let them decide how to spend it, with 20% saying it should go to the NI Assembly and 7% the UK Exchequer. Eleven percent of consumers were undecided.

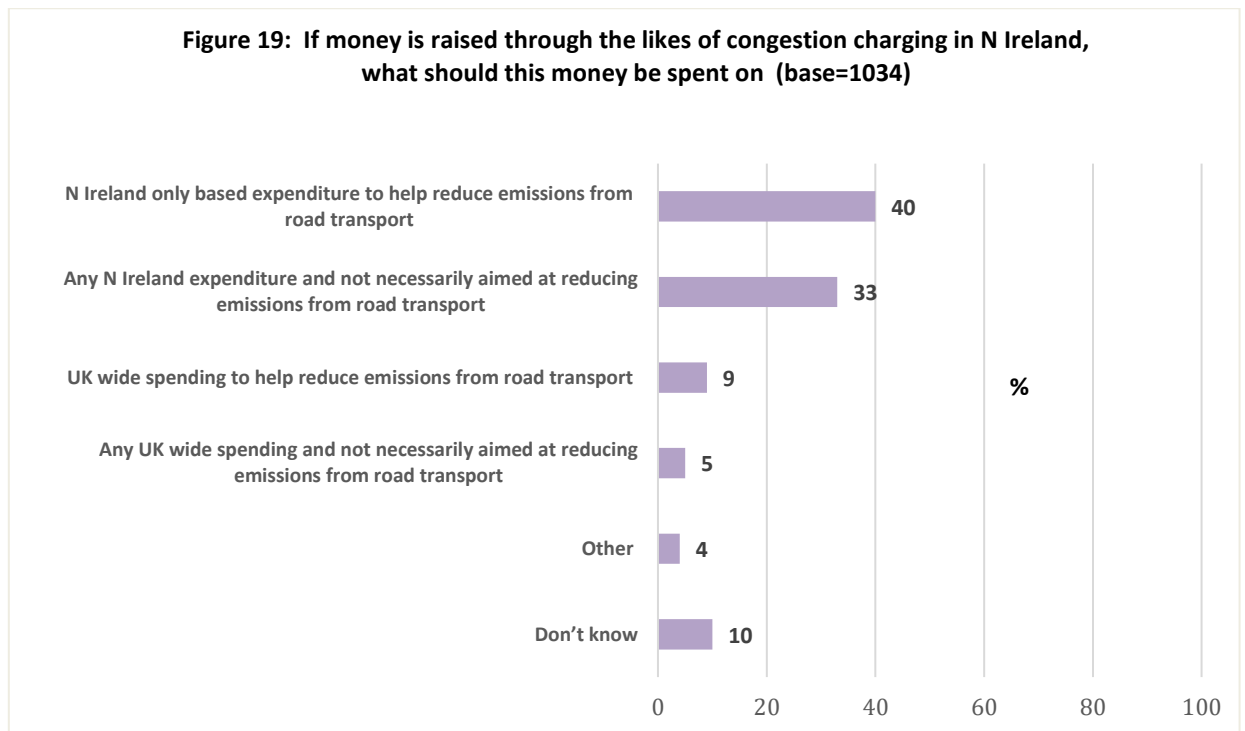


### 3.9.5 Spending money raised through congestion charging

Consumers were asked If money is raised through the likes of congestion charging in N Ireland, what should this money be spent on.

Figure 19 shows that 40% believe this money should be spent on N Ireland only based expenditure to help reduce emissions from road transport, with 33% believing that it should be spent on any N Ireland expenditure and not necessarily aimed at reducing emissions from road transport.

Just 14% believe that money raised through the likes of congestion charging in N Ireland should be allocated to UK wide spending to help reduce carbon emissions from transport (9%) or any UK wide spending and not necessarily aimed at reducing emissions from road transport (5%). Four percent cited spending on other things, and 10% were undecided.

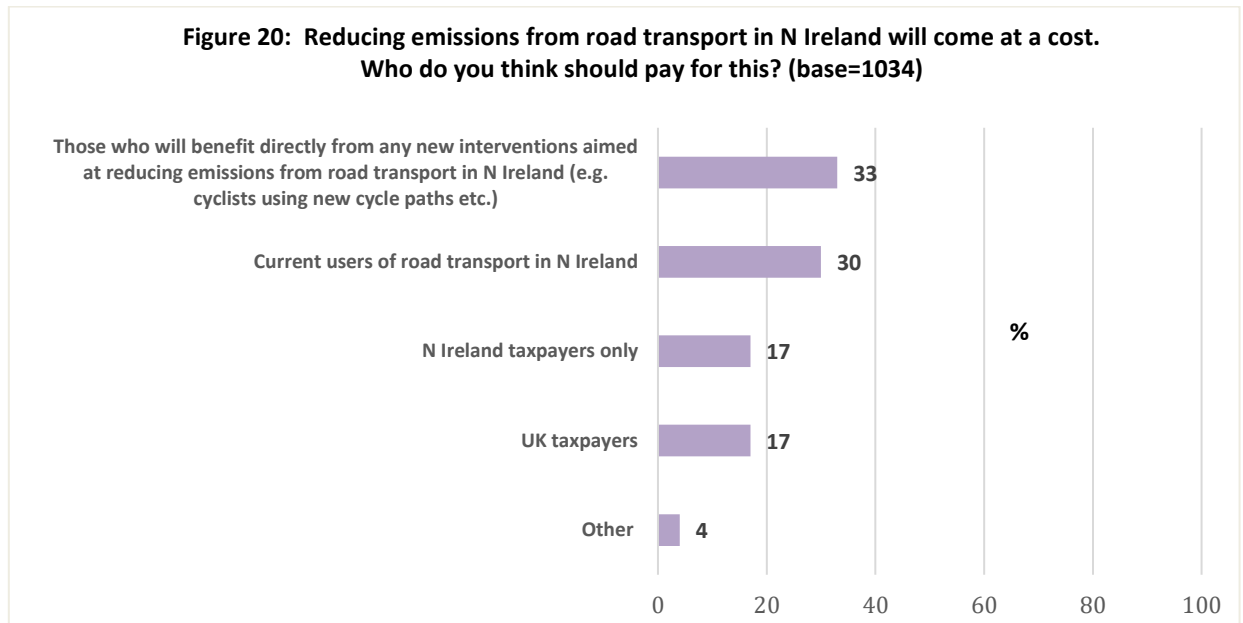


### 3.9.6 Paying to reduce carbon emissions from transport

Reducing emissions from road transport in N Ireland will come at a cost, with consumers asked who they believe should pay for this.

Figure 20 shows that there was a mixed response to this question with similar numbers of the view that those who will benefit directly from any new interventions aimed at reducing emissions from road transport in N Ireland (e.g. cyclists using new cycle paths etc.) should pay (33%), and that current users of road transport in N Ireland (30%) should pay.

There was an even split in the numbers of consumers who believe that N Ireland taxpayers and UK taxpayers should pay (both 17%). Four percent provided other responses.



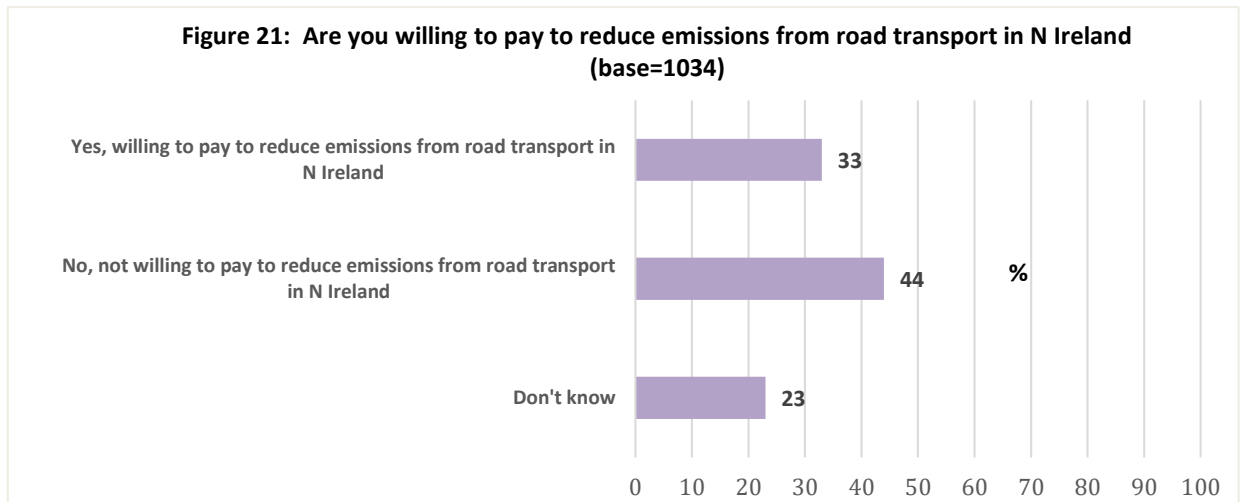
#### Those were a number of significant differences:

- Men were more likely to say that UK taxpayers should pay (20% vs. 14%), whereas women were proportionately more likely to say that current users of road transport in N Ireland should pay (35% vs. 26%)
- Younger consumers were more likely to say that UK taxpayers should pay (16-34, 21%; 35-59, 18%; 60+, 11%) whereas older consumers were proportionately more likely to say that current users of road transport in N Ireland should pay (16-34, 23%; 35-59, 27%; 60+, 42%)
- Economically active consumers were more likely to say that UK taxpayers should pay (20% vs. 10%) whereas those who are economically active were more likely to say that current users of road transport in N Ireland should pay (41% vs. 26%)
- Residents in urban areas were more likely to say that current users of road transport in N Ireland should pay (32% vs. 27%), whereas residents in rural areas were proportionately more likely to say that UK tax payers should pay (22% vs. 15%)

### 3.9.7 Consumer willingness to pay to reduce emissions from road transport in N Ireland

Consumers were asked if they are willing to pay to reduce emissions from road transport in N Ireland, with 33% saying they are, 44% saying they are not, and 23% were undecided.

Among those willing to pay (n=336), the average amount they were willing to pay was £71.92.



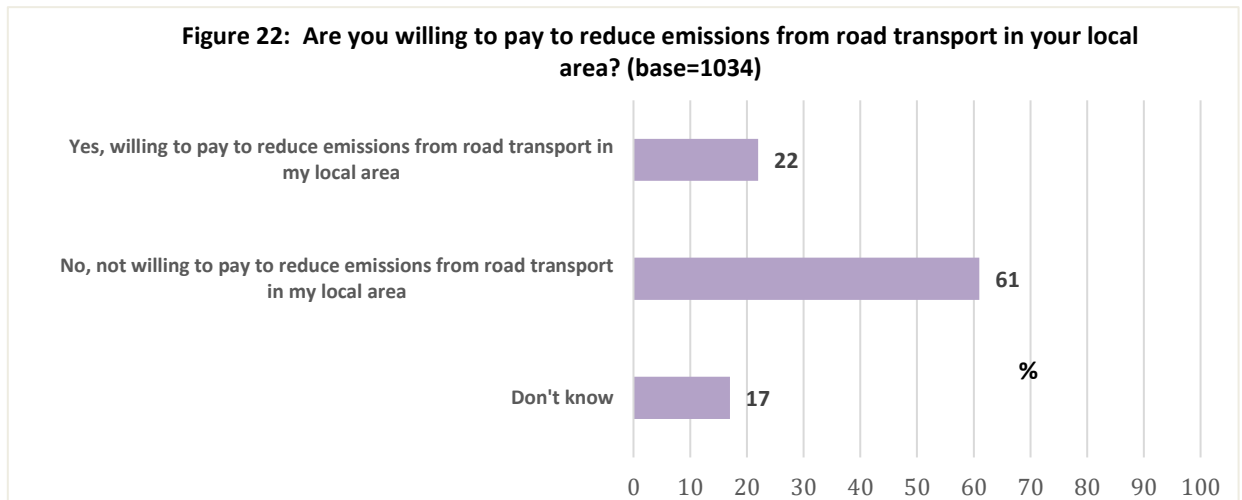
Those **more likely to say they are willing to pay to reduce emissions from road transport in N Ireland** included:

- Men compared with women (39% vs. 27%)
- Younger consumers (16-34, 37%: 35-59, 33%: 60+, 27%)
- ABC1 consumers (38%) [C2DE, 27%]
- Better educated consumers (low, 29%: medium, 32%: high, 35%)
- Economically active consumers (35% vs. 27%)
- Higher income groups (<=£20K, 29%: 20K-£40K, 35%: £40K+, 37%)
- Those who most often use an alternative to a car to get about (39% vs. 30%)

### 3.9.8 Willingness to pay more in local rates to reduce emissions from road transport in local area

Consumers were asked if they are willing to pay to reduce emissions from road transport in their local area, with 22% saying they are, 61% saying they are not, and 17% were undecided.

Among those willing to pay (n=231), the average amount they were willing to pay was £50.32.



Those **more likely to say they are willing to pay to reduce emissions from road transport in their local area** included:

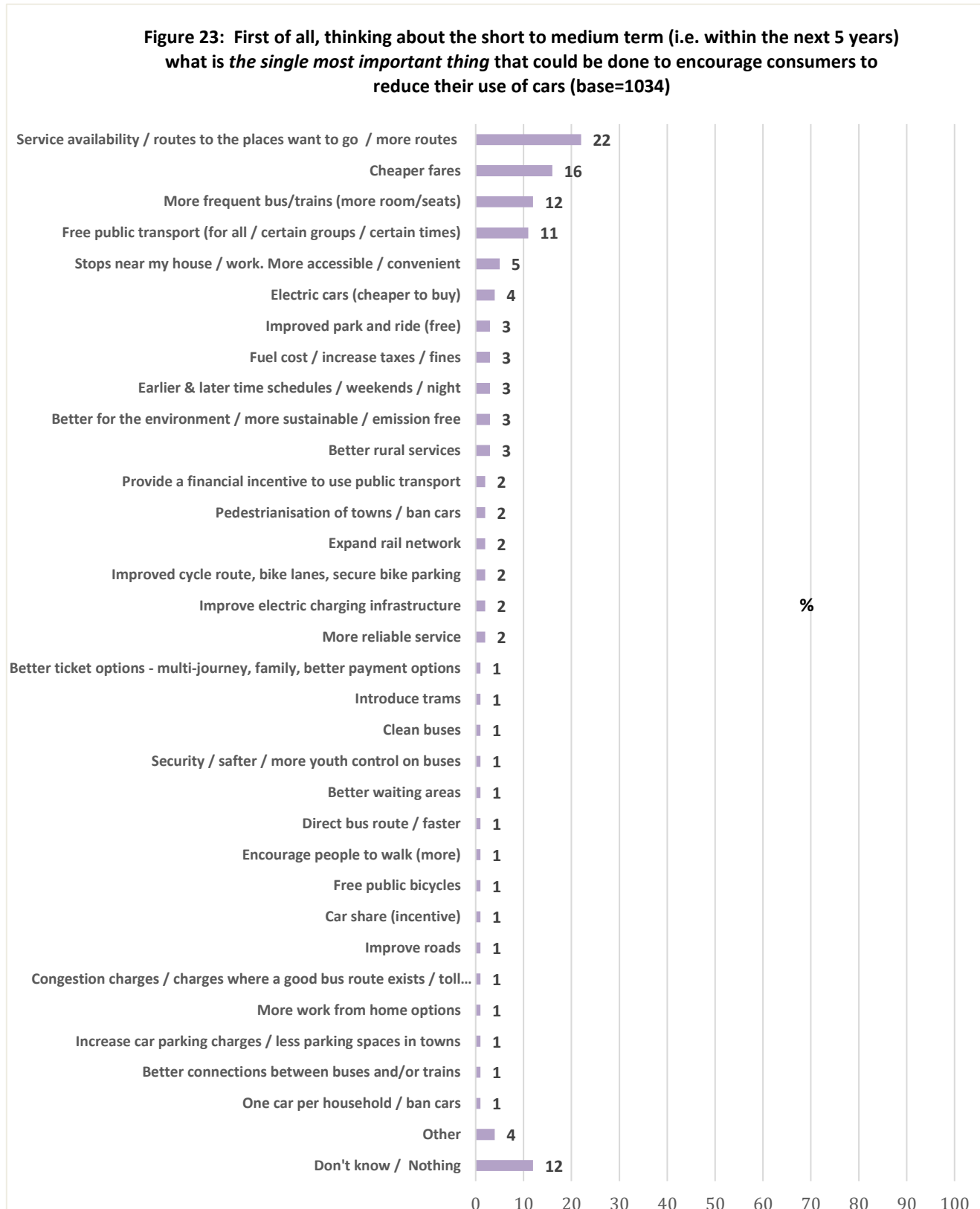
- Men compared with women (26% vs. 19%)
- Younger consumers (16-34, 31%; 35-59, 20%; 60+, 18%)
- Better educated consumers (low, 20%; medium, 18%; high, 25%)
- Higher income groups (<=£20K, 21%; 20K-£40K, 23%; £40K+, 26%)
- Those who most often use an alternative to a car to get about (32% vs. 19%)



3.10 Encouraging consumers to reduce their car use in the short and medium term

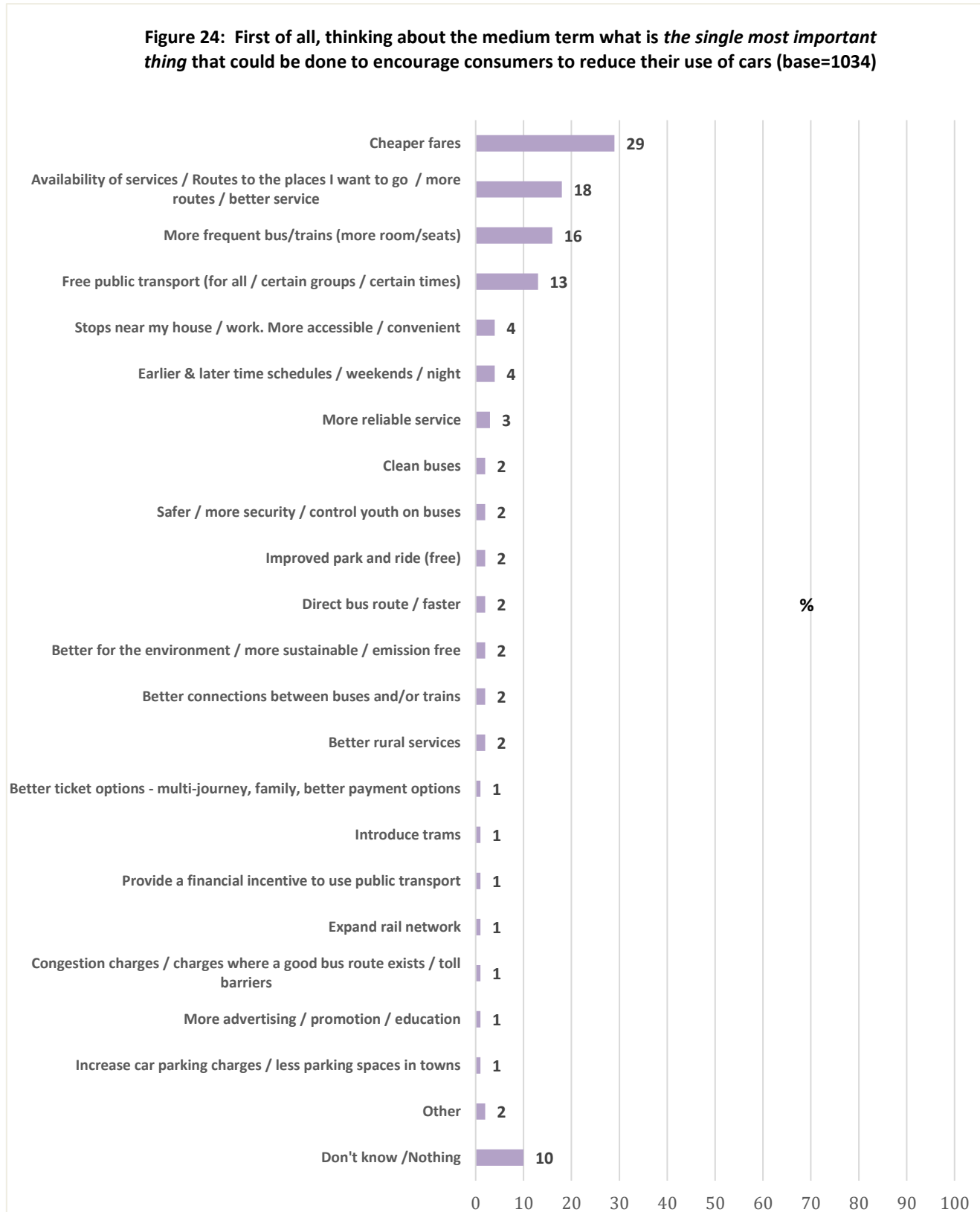
3.10.1 Single most important thing in short to medium term to encourage consumers to reduce car use

Consumers were asked to say what is **the single most important thing** that could be done to encourage consumers to reduce their use of cars in the short to medium term (i.e. within the next 5 years). The most common suggestions included: improved service availability / routes to places consumers want to go (22%); cheaper fares (16%); more frequent services (12%); and, free public transport (11%).



3.10.2 Single most important thing in the medium term to encourage consumers to reduce car use

Consumers were asked to say what is *the single most important thing* that could be done to encourage consumers to reduce their use of cars in the medium term, with cheaper fares (29%), improved service availability / routes to places consumers want to go / better services (18%), more frequent services (16%) and free buses and trains (13%) most commonly suggested.



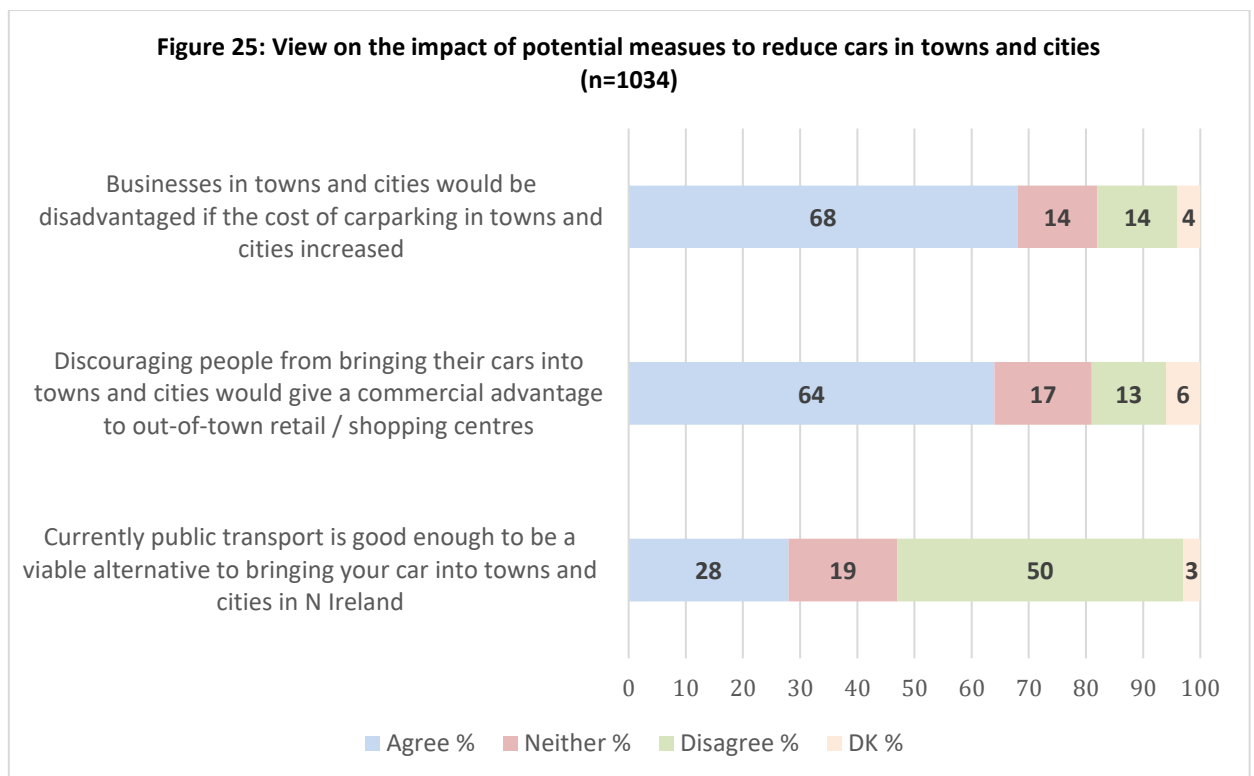
### 3.11 Business and public transport

Consumers were asked to say if they agreed or disagreed with a series of statements about issues relating to business and public transport.

Figure 25 shows that almost seven out of ten believe that businesses in towns and cities would be disadvantaged if the cost of carparking in towns and cities increased (68%), with 14% neither agreeing nor disagreeing, 14% disagreeing and 4% undecided. **There was no significant difference in response to this statement between those with responsibility for running a business in N Ireland (70% agree) and consumers (68% agree).**

Almost two out of three (64%) consumers supported the view that discouraging people from bringing their cars into towns and cities would give a commercial advantage to out-of-town retail / shopping centres, with 17% neither agreeing nor disagreeing, 13% disagreeing and 6% undecided. **There was no significant difference in response to this statement between those with responsibility for running a business in N Ireland (65% agree) and consumers (64% agree).**

Just over a quarter (28%) agreed that currently public transport is good enough to be a viable alternative to bringing your car into towns and cities in N Ireland, with 19% neither agreeing nor disagreeing and half (50%) disagreeing. Three percent were undecided. **There was no significant difference in response to this statement between those with responsibility for running a business in N Ireland (28% agree) and consumers (28% agree).**



## Appendices

## Appendix 1 (Focus Group Topic Guide)

**Appendix 2 (Survey Questionnaire)**



## Questionnaire v3

### TRANSPORT DECARBONISATION DRILL DOWN: CONSUMER SURVEY

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## Section A: Decarbonisation and Public Transport

Travel and transport services are important to all consumers in Northern Ireland. However, in order to tackle climate change there is a need to reduce carbon emissions and to meet a government commitment of net zero emissions from road transport by 2040.

We in Northern Ireland are very dependent on cars. Over 70% of our journeys are made by car, while only one-quarter of our journeys are taken by walking, cycling or public transport. Therefore, reducing private car journeys is essential to reducing emissions from road transport and this requires action to change how we behave.

A1. Can we start by asking how often you use the following types of transport to get about? **(Answer for each)**

Daily	1
Weekly	2
Monthly	3
At least a few times a year	4
Less often	5
Never	6

1	Car or company car
2	Bus
3	Train
4	Walk
5	Cycle

A2. Of the different forms of transport you use [ONLY LIST THOSE SELECTED AT A1] to get about, which do you use / do most often? **(Select one only)**

1	Car or company car
2	Bus
3	Train
4	Walk
5	Cycle

A3. In terms of how you see yourself in relation to public transport in N Ireland, please say at what stage you are currently at? *[by public transport we mean buses and trains]* **(Select one only)**

Never think about using public transport	1
Starting to think about using public transport	2
Planning to start using public transport	3
Recently started using public transport	4
Regular user of public transport	5
Used public transport in the past but no longer use it	6

A4. What is **the single biggest barrier** to you using public transport more often? **(Select one only)**

The cost	1
Inconvenience	2
Takes too much time	3
Poor service (availability and frequency)	4
Poor connections / not well integrated	5
Cleanliness	6
Personal safety	7
Other (please specify)	8



A5. Thinking about public transport in N Ireland, please say if each of the following statements is true or false for you (by public transport we mean buses and trains). **(Answer for each)**

True	1
False	2
Don't know	3

1	Public transport services are frequent enough to meet my needs
2	Public transport in N Ireland is convenient
3	Public transport in N Ireland is affordable

A6. How dependent would you say you are on public transport in N Ireland? **(Select one only)**

Very dependent	1
Dependent	2
Not very dependent	3
Not at all dependent	4

A7. Would you find it easy or difficult to reduce your car use? **(Select one only)**

Easy	1
Difficult	2
Don't know	3

**ASK IF A7 EQ 2**

A8. Why do you say that?

A9. Would you find it easy or difficult to increase your use of public transport? **(Select one only)**

Easy	1
Difficult	2
Don't know	3

**ASK IF A9 EQ 2**

A10. Why do you say that?

A11. What is ***the single most important thing*** that needs to change for you to use public transport more often?

**Section B: Interventions**

- B1. Because of the need to reduce road transport emissions the government and other authorities are keen to discourage use of private cars in favour of greater use of alternative forms of transport such as walking, cycling and public transport.

There are different measures which can be introduced to discourage us from using our private cars. Please say to what extent you are supportive or unsupportive of each of the following measures. **(Answer for each)**

Very supportive	1
Supportive	2
Not very supportive	3
Not at all supportive	4
Don't know	5

**RANDOMLY PRESENT**

1	Introducing congestion charges for those driving into cities and large towns in N Ireland
2	Banning heavy goods vehicles (HGVs) from cities and large towns in N Ireland
3	Increasing the cost of carparking to deter people from driving into towns and cities
4	Reducing the amount of carparking in towns and cities to deter people from driving into towns and cities
5	Increased taxation of petrol and diesel to deter private car use

- B2. And to what extent you are supportive or unsupportive of each of the following measures. **(Answer for each)**

Very supportive	1
Supportive	2
Not very supportive	3
Not at all supportive	4
Don't know	5

**RANDOMLY PRESENT**

1	Increase the number of cycle lanes
2	Traffic calming measures to reduce the speed of traffic to accommodate other road users (e.g. cyclists)
3	Having 'low traffic neighbourhoods' where vehicle access is restricted
4	Making towns and cities pedestrian only
5	Banning petrol and diesel cars
6	Restricting petrol and diesel cars in town centres at certain times

- B3. Encouraging more people to use their car less, and to use public transport more, is important in helping to reduce emissions from road transport in N Ireland. Please say how likely it is that each of the following would encourage you to use your car less and public transport more. **(Answer for each)**

Very likely	1
Likely	2
Unlikely	3
Very unlikely	4
Don't know	5

**RANDOMLY PRESENT**

1	Cheaper bus and rail fares
2	Free public transport
3	More and better park and ride facilities
4	Cleaner buses and trains
5	Greener public transport services (e.g. more electric buses, use of alternative lower polluting fuels etc.)
6	More night services
7	More weekend services
8	Easier access to different forms of public transport (e.g. buses, trains etc.)
9	Improving personal safety when using public transport

- B4. Of the different factors you mentioned, which is **most likely to encourage you** to use cars less and public transport more? **(Select one only)**

1	Cheaper bus and rail fares
2	Free public transport
3	More and better park and ride facilities
4	Cleaner buses and trains
5	Greener public transport services (e.g. more electric buses, use of alternative lower polluting fuels etc.)
6	More night services
7	More weekend services
8	Easier access to different forms of public transport (e.g. buses, trains etc.)
9	Improving personal safety when using public transport
10	Other (please specify)

**Section C: Willingness to Pay**

- C1. Developing the public transport infrastructure in N Ireland to encourage greater use and reduce emissions from road transport will require investment and come at a cost. How much of a current spending priority do you feel investment in public transport in N Ireland is? **(Select one only)**

Major spending priority	1
Minor spending priority	2
Not currently a priority	3
Don't know	4

- C2. If congestion charging were to be introduced to help reduce traffic in towns and cities across N Ireland, how much would the daily charge need to be to stop you taking your car into a town or city?

£

- C3. Instead of a congestion charge, if the cost of carparking in N Ireland's towns or cities increased to deter people from travelling by car, how much would the cost of parking your car for an hour need to be to stop you taking your car into a town or city?

£

C4. If money is raised through the likes of congestion charging in N Ireland, where should this money go? **(Select one only)**

The UK exchequer / central government / general pot and they decide on how it is spent	1
NI Assembly and they decide how it is spent	2
Local councils in N Ireland and they decide how it is spent	3
Don't know	4

C5. If money is raised through the likes of congestion charging in N Ireland, what should this money be spent on? **(Select one only)**

UK wide spending to help reduce emissions from road transport	1
Any UK wide spending and not necessarily aimed at reducing emissions from road transport	2
N Ireland only based expenditure to help reduce emissions from road transport	3
Any N Ireland expenditure and not necessarily aimed at reducing emissions from road transport	4
Other (please specify)	5
Don't know	6

C6. Reducing emissions from road transport in N Ireland will come at a cost. Who do you think should pay for this? **(Select one only)**

UK taxpayers	1
N Ireland taxpayers only	2
Current users of road transport in N Ireland	3
Those who will benefit directly from any new interventions aimed at reducing emissions from road transport in N Ireland (e.g. cyclists using new cycle paths etc.)	4
Other (please specify)	5

C7. Are you willing to pay to reduce emissions from road transport in N Ireland? **(Select one only)**

Yes	1
No	2
Don't know	3

**ASK IF C7 EQ 1**

C8. How much are you willing to pay in a year to help reduce emissions from road transport in N Ireland?

£

C9. Thinking about your local council area. Are you willing to pay more in your local rates to reduce emissions from road transport in your local area? **(Select one only)**

Yes	1
No	2
Don't know	3

**ASK IF C9 EQ 1**

C10. How much are you willing to pay in your local rates to help reduce emissions from road transport in your local area?

£

**We now want you think about the short to medium term i.e. within the next 5 years.**

C11. First of all, thinking about the short to medium term (i.e. within the next 5 years) what is ***the single most important thing*** that could be done to encourage consumers to reduce their use of cars?

C12. Again, thinking about the short to medium term (i.e. within the next 5 years) what is **the single most important thing** that could be done to encourage greater use of public transport?

C13. Are you responsible or do you share responsibility for running a business in N Ireland? **(Select one only)**

Yes	1
No	2

C14. Please say to what extent you agree or disagree with each of the following statements. **(Answer for each)**

Strongly disagree	1
Disagree	2
Neither	3
Agree	4
Strongly agree	5
Don't know	6

1	Currently public transport is good enough to be a viable alternative to bringing your car into towns and cities in N Ireland
2	Businesses in towns and cities would be disadvantaged if the cost of carparking in towns and cities increased
3	Discouraging people from bringing their cars into towns and cities would give a commercial advantage to out-of-town retail / shopping centres

**Section X: About You**

Finally, some questions about you.

X1. Are you...? **(Single Code)**

Male	Female	Prefer not to say
1	2	3

X2. What age are you?

X3. What is your occupation?

X3a. Which of the following defines your employment position? **(Single Code)**

Higher managerial, administrative or professional	1
Intermediate managerial, administrative or professional	2
Supervisory or clerical and junior managerial, administrative or professional	3
Skilled manual worker	4
Semi-skilled and unskilled manual worker	5
State pensioner, casual worker, or unemployed with state benefits only	6

X4. What is your current employment status? **(Single Code)**

Self-employed	1
Working full-time	2
Working part-time	3
Seeking work for the first time	4
Unemployed, i.e. not working but actively seeking work	5
Not actively seeking work but would like to work	6
Not working and not seeking work	7
Looking after home and family	8
Unable to work due to permanent illness or disability	9
Student (full time)	10
Student (part time)	11
On a government or other training scheme / apprenticeship	12
Retired	13
Other (please specify)	14

X5. What is your highest educational qualification? **(Single Code)**

Degree Level or higher	1
BTEC (Higher), BEC (Higher), TEC (Higher), HNC, HND	2
GCE A Level (including NVQ Level 3)	3
BTEC (National), BEC (National), TEC (National), ONC, OND	4
GCSE (including NVQ Level 2), GCE O' Level (including CSE Grade 1), Senior Certificate, BTEC (General), BEC (General)	5
CSE (Other than Grade 1)	6
Other (Please specify)	7
No formal qualification	8
Refused	9

X6. Are your day-to-day activities limited because of a health problem or disability which has lasted or is expected to last, at least 12 months? Include problems which are due to ageing. **(Single Code)**

Yes, limited a lot	1
Yes, limited a little	2
No	3
Prefer not to say	9

X7. Which local council area do you live in? **(Single Code)**

Antrim and Newtownabbey Borough Council	1
Ards and North Down	2
Armagh City, Banbridge and Craigavon	3
Belfast	4
Causeway Coast and Glens	5
Derry and Strabane	6
Fermanagh and Omagh	7
Lisburn and Castlereagh	8
Mid and East Antrim	9
Mid Ulster	10
Newry, Mourne and Down	11

X8. Finally, what type of area do you live in? (Select one only)

City	1
A town	2
A village	3
Rural or countryside	4

X9. Do you or your household have access to an electric or hybrid vehicle?

Yes	1
No, but planning to buy one	2
No	3

X10. Could you please indicate the number that best describes your total **personal income** per year (whether from employment, pensions, state benefits, investments, or any other sources) before the deduction of tax. **(Single code)**

Less than £10,000	1
£10,001 – £20,000	2
£20,001 – £30,000	3
£30,001 – £40,000	4
£40,001 – £50,000	5
£50,001 - £60,000	6
£60,001 - £70,000	7
£70,001 - £80,000	8
£80,001- £90,000	9
£90,001 - £99,999	10
£100,000+	11
Prefer not to answer/ Don't know	12

**THANK AND CLOSE**