The Consumer Council

FUTURE OF TRANSPORT:

Survey of Northern Ireland Consumers

8 April 2022

FINAL

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Executive Summary

In January 2022, The Consumer Council commissioned Social Market Research (SMR) to undertake research on the future of transport in NI. The research is based on two elements: six focus groups with consumers; and, a large-scale quantitative survey of consumers (n=1124). The research was conducted in accordance with the ISO20252 Standard and fieldwork was carried out in February and March 2022.

Key findings from the focus groups

- Consumers said that rural bus services are too infrequent making it difficult to go into the local town to shop because of the long wait for a return bus.
- Belfast consumers expressed dissatisfaction about having to take a bus into the city centre and another one out again if they wanted to travel across town.
- Bus drivers were criticised for lacking flexibility in stopping to pick up passengers or for moving off too quickly before passengers are safely seated.
- Consumers dislike having to have the correct change for a bus fare and urged the rapid roll out of “touch to pay” services.
- There was a consensus amongst bike users that existing cycle lanes were often dangerous.
- There were many negative comments on the cost, availability and convenience of transport services to and from Belfast’s airports.
- Many consumers thought that flights from Dublin were cheaper than from either of the two Belfast airports.
- For most consumers, cost, convenience, accessibility, and the weather appear to trump climate change and reducing emissions when it comes to making choices about transport and travel
- Countering climate change was viewed by many consumers as someone else’s responsibility, not an individual’s duty, but a responsibility of governments, transport providers and manufacturing companies.
- Consumers were wary of having to bear the cost of greener transport and most felt that it was governments responsibility to bear the brunt of the cost.
- Consumers expect that public transport will be powered by electricity or hydrogen and that, eventually, individual consumers will have to follow suit with low carbon solutions to private transport.
- With the rise in the number of electric cars being seen as inevitable, consumers want to see a big improvement in the charging network.
- As a result of the investments necessary to reduce carbon emissions, consumers also expect the cost of transport to rise.
- Better connectivity and flexibility were consumers main hopes for public transport in the future. Bringing competition in from other transport providers was seen as a means by which this connectivity and flexibility could be provided.
- Consumers saw the future of private travel as being more active. Cycling, in particular is expected to rise in popularity.
- Walking is not generally seen as a travel option; it is viewed mainly as recreation or exercise.
- Support for active travel would also be welcomed by consumers, particularly improvements in cycling lanes and cycling safety.

- Some consumers thought that the pandemic and a greater emphasis on carbon emissions had changed attitudes to foreign holidays and thought there would be fewer people wanting to travel abroad in the future.

- There was, however, a counter view from those who thought that there was a pent up wish to travel again to overseas holiday destinations.

- In terms of consumer protection, the biggest concern was in relation to delayed or cancelled flights. Some thought that EU exit might result in a loss of rights and others said that the compensation process should be simplified.

Key findings from the survey

Use of different forms of transport

- 82% of consumers most commonly used a private car for transport, 55% walk, 42% use bus services, and 32% use train services (other forms of transport were used by relatively fewer consumers: taxis, 28%: planes, 26%: cycling, 14%: ferries, 13%; and, company cars, 4%)

- Private cars were used most often by consumers (70%), followed by walking (16%) and taking a bus (9%)

- When travelling in local areas, consumers most commonly did so by car (61%), with the same true for when travelling to other parts of NI (68%), and to the Republic of Ireland (67%). Planes were most commonly used when travelling to GB (58%), with the same true when travelling to places outside of the UK and Ireland (81%)

Views on bus services

- 63% said that bus drivers are generally courteous, helpful and have a good attitude
- 60% believe that having to carry cash / have the exact amount for a bus ticket is inconvenient
- 59% believe that the bus service in their local area is frequent enough to meet their needs
- 58% feel safe on buses
- 54% say there is a good local bus service where they live
- 51% believe that more competition in bus services would benefit consumers
- 49% have a good understanding of bus services in their local area (i.e. times and frequencies etc.)
- 45% believe there are good bus routes across NI
- 43% believe that bus services offer consumers good value for money
- 38% said that the bus services meet the needs of families with young children / prams
- 36% agree that bus services meet the needs of people with a disability
- 28% believe that there is a good bus service at weekends
- 23% believe there is overcrowding on buses

Views on train services

- 78% believe that the rail network in NI should be expanded to other areas of NI
- 69% agreeing that trains should use more environmentally friendly fuels
- 62% would use train services more often if they could
- 55% feel safe on trains
- 51% said that more competition in train services would benefit consumers
- 48% believe that train services in NI meets the needs of young families with children / prams
- 43% believe that train services in NI meet the needs of people with a disability
- 35% believe train services offer NI consumers value for money
- 37% said their local area is well served by trains

Views on private cars

- 84% believe that driving is more convenient than other forms of transport
- 61% would use their car less if public transport was free or heavily subsidised
- 47% think of the environmental impact of their car when driving
- 46% will be looking at other forms of transport because of rising petrol / diesel prices
- 42% drive because there is poor public transport provision in their local area

- 37% will always use their car regardless of what other public transport options are available
- 31% say that driving is cheaper than other forms of transport
- 36% said they have mobility issues and driving is better than other forms of transport.

Views on taxis

- 54% agree that their local area is well served by taxis / good availability
- 23% say that taxi services in their local area offer good value for money
- 19% are worried about their personal safety when using taxis (women more likely to agree, 21% vs. 17%)

Views on airlines

- 66% said Dublin airport offers greater choice of flights than NI airports
- 61% believe there is good choice / availability of flights from NI to GB
- 48% said there is good choice / availability of flights from NI to places outside of GB
- 41% said Dublin airport offers better value for money on flights than NI airports
- 39% agree that there are good public transport services to NI airports
- 32% believe that flights from NI offer consumers good value for money
- 23% agree that airport parking is affordable for them
- 22% said Dublin airport is easier to get to than NI airports

Views on ferries

- 35% believe that ferry services from NI offer consumers good value for money

Views on walking and cycling

- 57% believe that their local area would benefit from more cycle lanes
- 57% said that where they live it is possible to get around by walking rather than taking other forms of transport
- 49% agree that cyclists and pedestrians should be able to share the same routes
- 43% try to walk / cycle when they can to help reduce their carbon footprint
- 39% believe that their local council area would benefit from cycle pods or 'Belfast Bikes'
- 36% said that where they live the roads are safe enough to be able to travel by bike or by walking
- 29% would feel confident cycling

Decisions on which form of transport to use

- 47% said that convenience matters most to them when making decisions about travel, 28% said cost matters most, 12% cited journey time, 6% mentioned accessibility, 3% Covid safety, and 3% protecting the environment

Climate change and transport

- 70% couldn't afford to buy an electric vehicle
- 69% say main financial responsibility for making transport more environmentally friendly lies with government
- 61% would be more likely to purchase an electric vehicle if a grant was available
- 31% believe that using public transport in NI is currently an attractive option for them
- 30% try to use public transport where possible to help protect the environment
- 28% say that climate change / protecting the environment influences their decisions on type of transport to use
- 26% would be willing to pay more to support more climate friendly transport options in NI
- 12% believe there are enough charging points in NI for electric vehicles (car users were more likely to disagree (61% vs. 35%)

Future of transport in NI

- In relation to **the future of public transport** in NI, consumers most commonly called for cheaper prices (25%) and improved infrastructure (25%)

- In relation to **transport by car** in NI, consumers most commonly called for cheaper prices (42%) and improved infrastructure 13%)

- In relation to **planes and ferries** in NI, consumers most commonly called for cheaper fuel prices (37%) and greater choice (24%)

- In relation to active travel such as **walking and cycling** in NI, consumers most commonly called for improved infrastructure (47%) and for it to be safer to engage in active travel (12%)

Support for change in relation to climate change and transport

- 84% are supportive of transport services being better connected / integrated
- 80% are supportive of having more bus routes / more flexible bus routes
- 80% are supportive of more investment in the rail network
- 76% are supportive of more investment in electric / hydrogen driven buses and trains
- 65% are supportive of free public buses and trains paid for completely by NI government funding
- 64% are supportive of greater provision of cycle lanes in their local area
- 61% are supportive of having a 'circle line' train service serving Antrim, Lisburn and Greater Belfast
- 46% are supportive of legalised use of e-scooters under regulation

Awareness of Consumer Council responsibility for representing the interests of consumers / consumer protection

- 37% are aware that The Consumer Council has a responsibility for representing the interests of consumers in relation to transport generally

- 33% believe there are particular aspects of transport in NI where they feel they need greater protection, the most common of which are protection in relation to buses (13%), 12% cited rising prices, and 11% cited taxis

Conclusions

The future of transport in NI is an issue on which consumers have fairly strong views. One of the strongest views is that government, not individuals, should be in the lead when it comes to change. Consumers are looking to government to invest in better infrastructure and improved public transport networks. Whilst consumers are willing to play a part, they also see greener transport as being mainly the responsibility of the government.

People's lives do not always coincide with public transport routes, so for school runs, supermarket shopping and cross-town travel, consumers are more likely to choose private transport. In rural areas, public transport timetabling does not always coincide with people's travel needs resulting, again, in people choosing private cars for many journeys.

Consumers think that public transport would become used by more people if routes were more flexible and if buses and train services were more joined up. In Belfast, consumers complain about the need to travel into town and back out again for a journey that can be done using a cross town route in a private car. In many rural areas, consumers complain that the rail service is confined to what they call the east coast and the Derry/Londonderry route.

Consumers are generally negative about what they see as the monopoly of Translink. Some of the problems with public transport could be tackled, consumers argue, by bringing more competition into the provision of public transport.

When it comes to making decisions about which mode of transport to use, convenience is the main consideration. Inconvenient public transport pushes consumers to choose their private cars. Furthermore, cost and convenience, trump considerations of climate change when people decide on how and when to travel. Consumers do think about climate change but most still drive their cars because of convenience and lower cost. Whilst many consumers would like to have an EV, most say that they are too expensive to buy and the charging infrastructure is poor. A grant to cover the upfront cost of an electric vehicle is likely to be the main lever that will bring about the transition to EVs.

When it comes to active travel, many consumers do see the benefits, mostly in terms of health and wellbeing. However, walking is not seen by most as a mode of travel. As many consumers say, most of their travel is for a purpose and that purpose, whether it be the weekly shop or the school run, is not served by walking. Cycling is seen as a viable mode of transport, but many consumers think that the roads are too dangerous for cycling and they would like to see more cycle lanes.

Finally, many consumers are looking forward to holidays abroad now that their fears about the pandemic are receding. There were a lot of comments from consumers about poor transport links to the main airports and high parking charges. Many consumers thought they had better choice when travelling through Dublin Airport.

1. Introduction

In January 2022, The Northern Ireland Consumer Council commissioned Social Market Research (SMR) to undertake focus groups and a consumer survey to develop an understanding of the consumers' views and priorities for the current and future transport system in NI. This report presents the findings from this research.

1.1 Research aims

The overall research aim is to:

'To develop an understanding of the consumers' views and priorities for the current and future transport system in NI.'

Within this overall research aim there were a number of attendant objectives:

- To garner consumer insights that will be used to frame the Consumer Council transport work programme.
- Gain a comprehensive understanding of consumers' views on transport (not be limited to any particular aspect or sector of transport).
- To understand how NI consumers currently travel, locally, regionally, nationally and internationally.
- To understand the opinions and choices currently being faced by consumers in transport.
- To understand the opinions of consumers on changes they believe will and they would like to see take place, that will affect them as users of transport, in the future.
- To understand what and how their opinions, choices and day-to-day issues have changed since the start of Covid-19 (March 2020); and,
- To understand consumers knowledge of the role of the Consumer Council in transport and what transport priorities they would like to see the Consumer Council address over the next three years.

1.2 Research methodology

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

1.3 Focus groups

In advance of the quantitative survey, six focus groups were conducted to explore and identify the key issues for consumers in relation to the future of transport in NI. 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 48 consumers participated in six groups in early February 2022, 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.

Table 1 Profile of those taking part in six focus groups [n=48]			
		%	n=48
Sex	Male	48	23
	Female	52	25
Age	16-34	31	15
	35-59	42	20
	60+	27	13
Social Class	ABC1	47	23
	C2DE	53	25
Area	Urban	30	14
	Rural	70	34
Disability	Yes (to include 3 participants using mobility aids)	20	10
	No	80	38
Local Authority Area	Antrim and Newtownabbey Borough Council	10	5
	Ards and North Down	8	4
	Armagh City, Banbridge and Craigavon	8	4
	Belfast	10	5
	Causeway Coast and Glens	8	4
	Derry and Strabane	8	4
	Fermanagh and Omagh	10	5
	Lisburn and Castlereagh	10	5
	Mid and East Antrim	8	4
	Mid Ulster	8	4
	Newry, Mourne and Down	8	4
Source: NI Census of Population (2020 mid-year estimates)			

1.4 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
- Use of different types of transport for travelling locally, regionally, nationally and internationally
- Views on bus services
- Views on train services
- Views on using private cars
- View on taxi services
- Views on airline services
- Views on ferry services
- Views on walking and cycling
- Decisions on using transport
- Changes to transport (public transport, by car, transport by planes and ferries and walking and cycling)
- Support for specific transport policies
- Consumer protection and transport

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

1.4.1 Survey methodology

The survey is based on 1121 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 11 – 22 March 2022. The research was conducted in line with ISO20252 of which Social Market Research is fully accredited.

1.4.2 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 2020.

Table 1.1 Sample Profile [n=1121]

		Weighed Sample	
		%	n
Sex	Male	48	533
	Female	52	589
Age	18-34	29	323
	35-59	45	506
	60+	26	292
SEG[1]	ABC1	49	546
	C2DE	51	575
Local government district	Antrim and Newtownabbey Borough Council	8	89
	Ards and North Down	9	101
	Armagh City, Banbridge and Craigavon	10	112
	Belfast	18	201
	Causeway Coast and Glens	8	89
	Derry and Strabane	8	89
	Fermanagh and Omagh	6	67
	Lisburn and Castlereagh	8	89
	Mid and East Antrim	7	83
	Mid Ulster	8	89
	Newry, Mourne and Down	10	112

1.4.3 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.

[1] 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 The big issues regarding transport

2.1.1 Local travel

When asked about the big issues locally facing them as transport consumers, public transport, especially buses, received the most comments. In rural areas, consumers found the service too infrequent making it difficult to go into the local town to shop because of the long wait for a return bus. Expectations of bus services in Belfast were much higher. Whilst rural consumers complained about a four-hour space between scheduled buses, Belfast consumers complained about having to wait for 45 minutes.

Belfast consumers also expressed dissatisfaction about having to take a bus into the city centre and another one out again if they wanted to travel across town. Some had heard about the mooted circle line train service and this idea received a high level of support.

There was some criticism of bus drivers, mostly about a lack of flexibility in stopping to pick up passengers or for moving off too quickly before passengers are safely seated.

Bus users also expressed dissatisfaction about having to have the correct change for a bus fare and urged the rapid roll out of "touch to pay" services.

> *"The bus is unreliable late or no show. Sometimes the bus is full when it gets here, and I have to go back to the house for the car."*

> *"At school time children all screaming on the bus, I feel like that's Covid waiting to happen."*

> *"Buses are a weird the one I use sometimes it can take 40 minutes for a 20 minute walk.".*

> *"Bus drivers ask for exact money, which is ridiculous, you have to carry cash, you need specific amounts for the fare. I don't really like carrying cash, it needs to be touch to pay."*

> *"Bus drivers are generally unpleasant and drive off before you can sit down. I have seen people running for the bus and the driver sees them but drives off."*

> *"The busy bus in the Lisburn area does not start early enough and we need a later service too. It stops at 5 p.m. but it would be good if it was 6 p.m. for some of the school kids still travelling home at that time."*

> *"I'm just outside Omagh and you couldn't use the public transport. You couldn't take a chance on it. We go everywhere by car. The bus comes every hour and a half if you miss one or it's early it's just no good."*

Those who cycle recalled bad experiences such as being knocked off their bicycle and there was a consensus amongst bike users that existing cycle lanes were often dangerous. There was also a call for more and wider cycle lanes. The issues faced by cyclists were often shared by pedestrians who commented on the dangers of walking where traffic is heavy.

> *"We don't have proper cycle lanes in Belfast, they are way too narrow, there are not enough of them; we are way behind other cities."*

> *"The roads are too dangerous for cyclists. The Albert Bridge is very dangerous, we have to use the footpath."*

> *"You wouldn't think about cycling on the country roads around here, you'd be wiped out by a bus or a lorry."*

> *"I would love to see more money invested into rural roads to make safe to walk on. My daughter's school is 10 minute walk but we drive. You'd be taking your life into your hand walking."*

2.1.2 Regional travel

One of the most frequently commented upon issues in relation to regional travel was transport services to and from Belfast's airports. Many contrasted the ease of travel to Dublin airport with difficulties getting to Belfast International or Belfast City.

> *"You can get a direct bus from the city to Dublin airport, but if you are going to Belfast airports it is more awkward. Take Belfast City Airport, you can get a train to Sydenham but it is still a trek to the airport from there with you cases up and over the footbridge."*

> *"You can travel direct to Dublin airport from Belfast for 15 euro but from Derry that only takes you as far as Ballymena or Antrim or you go on into Belfast and then back out again."*

> *"Translink is the only company, there's no competition, there's no pressure. Why would they want to make more rail or buses, there's no competition? Belfast is the only city in Europe with two airports and no transport to get there by rail or without going to Europa to get a bus."*

> *"My mum got the plane from Dublin to America and she had to get a lift to Belfast to get a bus to Dublin. You should be able to go more directly to Dublin from regional towns and not have to go through Belfast all the time.*

Apart from the services to airports, regional bus services got positive comments both in terms of the usability and the online booking system. Limited schedules at the weekends and poor weekday services into local towns did, however, attract criticism.

> *"The bus service to Derry is great and there is more compliance on mask wearing on those than elsewhere."*

> *"One problem if you are going one place then getting the bus somewhere else, for example Derry to Coleraine and then on somewhere else, inter connectivity can be an issue."*

> *"The Translink website works well and it interlinks services. Credit where credit's due."*

> *"My most recent experience of a bus was traveling to Belfast. I couldn't get a bus back on a Sunday at the time I needed it, so I had to get the bus to Castle Dawson roundabout and get a lift from there which was 20 miles. It's just a skeleton service at the weekend and that's when I'd want to use it."*

The A26 improvement from Frosses Road to the M2 was welcomed by consumers from Coleraine and Ballycastle.

> *"From Ballycastle to Belfast is so much easier now. That new (A26/M2) is unreal for us all the way down to Belfast. The problem is when you get into Belfast negotiating with bus lanes and more traffic."*

Many consumers expressed positive views on taking the train either for pleasure trips or for getting from A to B. There were some negative comments about cleanliness, but the train was a favoured way of travel for many especially if coming into Belfast for a night out. Consumers did bemoan the lack of service to many parts of NI and the idea of a circle line was welcomed.

> *"I use the train all the time, I don't like buses. I use the train for pleasure as well as for a trip to Belfast if I am going on a night out."*

> *"If I was going up to Belfast or to Dublin, I'd take the train so you could have a drink and come home safely."*

> *"A circle line train service would be great, especially if it linked out as far as the International Airport, I think most people would welcome that."*

> *"The rail service in NI has been run down over the years and they should reinstate as many of the old lines as possible."*

> *"In NI you could have a really good train infrastructure, like there used to be. At the moment, even in the greater Belfast area the train goes to Holywood, Bangor, Derry and Newry, that's it."*

"The trains are something I would never use as the routes so limited. If they were better or you could go more places it would be an option and more environmentally friendly."

2.1.3 National and international travel

Many consumers had limited experience of national and international travel in the last two years because of the pandemic. Those who had travelled nationally or internationally, noticed that prices were going up. Many commented on the cost of taking a car across to Scotland or to England compared to other ways of travelling.

"Taking the car on the ferry now if you are going to Glasgow for the football is just too expensive, it is cheaper to take the plane."

"The cost of the ferry to Scotland is astronomical if you work it out per mile. It should be subsidised."

"You seem to pay more and get less on the ferries, you used to get a cabin on the Liverpool route with your ticket, now you pay extra.

Consumers also noticed prices going up for air travel and often mentioned that flights from Dublin appeared to be cheaper than from either of the two Belfast airports. Lack of competition was blamed for some of the high prices and airport parking charges were criticised for being too expensive.

"There are not enough budget airline services any more they have all been cut back unless you travel to an English hub."

"People talk about cheap flights, but I never know where they are. They must be snapped up or only 2 seats"

"I travelled to Manchester a lot pre covid. Then Flybe stopped flights and EASYJET put up their prices immediately."

"Prices are woeful from NI, I prefer to go to Dublin to fly cheaper, nicer and with more choice, even the car parking is cheaper."

"Everything about airports and planes depresses me. Airport car parking is often as much as the cost of the flight and public transport connection to airports is poor."

2.2 Making decisions about travel and transport

Convenience, cost and dependability were the three most important factors to consumers when choosing which mode of transport to use. Convenience often boiled down to what had to be transported on a journey, how accessible the nearest public transport point was and what the weather was like. The purpose of the journey also played a part in decision making, for example, whether it was for the school run, for the weekly shop or for pleasure.

"I would say convenience and price. Probably depending what transport, local or further afield, international or Scotland or England price. If locally convenience over price, if further away, price is the most important."

"Convenience above all else, how close the bus stop is, how far I have to carry shopping, and the amount of shopping I have."

"I would walk to local shops, but if you go into town and want to have a drink, I take the bus."

"Depends on the weather and how far it is to the bus stop. I'd have to get a taxi back to get shopping home."

"I had a parent phone me the other day to say her child was late every morning due to limited bus drivers. Sometimes getting the bus is not convenient and the child was getting in trouble through no fault of his own. If you want to get there and be there for a certain time often the best option is to take your own vehicle."

The timetabling of public transport also played a role in making decisions, whether buses or trains, for example, were available at the right intervals for the panned journey.

> *"I am in a rural area not far from bus stop, but there are only 3 buses a day. So, If I take the bus in my husband has to pick me up when I am finished or vice versa. I can't do the shopping using the bus both there and back, the interval between services is far too long."*

Similar criteria were also common in making choices for more lengthy journeys.

> *"For me, if I am going to Scotland, it's price and timetable on ferry. Also, would also take into account the numbers of people travelling in the car for just a driver it is expensive, but with a full car it is cheaper per head."*

> *"You have to weigh it all up, how long it is going to take to get to, say Glasgow or London, then see what the cheapest means of transport is, ferry, car, train, plane whatever. It mostly comes down to cost in the end but if you are only going for a few days, then the quickest route might be the best."*

For people with disabilities, or with young children, accessibility is the most important factor. This in turn, means that convenience and speed of travel have to come second or third.

> *"It's all about accessibility for me. For my decisions would be can I get into the car and when I get there can I get out, disabled parking spaces and all would be my thing. The planes and stuff, I have flown before covid, and you get special assistance and all and they take you in a wheelchair, but it's all to do with accessibility how I get there, plane, car or the train"*

> *"Mobility influences my decision; how long will the journey be will it be comfortable or will it hurt me. Going through the airport I have to think first if I can do the long walk to the gate."*

> *"I only use my car because of mobility issues. Blue badge is great. Flying using special assistance is great, treated with dignity and great after you get over the embarrassment of being wheeled to the top of the queue."*

> *"Some buses lower down to let disabled people down. But if a bus drives to a housing estate and stops it could still be a 500-metre walk to the house so that makes it difficult for people to use and mostly I see them using taxis that take them to the door."*

> *"I do stay away from the buses it is a nightmare with prams, and space and people are ignorant, so I take the car."*

2.3 Climate change and making transport choices

Some consumers believed that climate change was an important issue and should feed into decisions about transport.

> *"I think that's one of the most important things we should be thinking about now. Less cars on the road, more electric vehicles."*

> *"Yes definitely, over the past couple of years I walk a lot more. If I don't need the car I will try and leave it at home. In work we have an electric car scheme, but they are so expensive it's out of the budget at the minute, but it definitely feeds into decisions about transport."*

> *"I would be thinking of that. Maybe it's having young kids and it's a pretty serious situation. Everything we can do we will do like."*

For most consumers, however, cost, convenience, accessibility, and weather appear to trump climate change and reducing emissions when it comes to choices about transport and travel

> *"I do think about it, I have 2 kids who are being educated about it. I am meant to lead by example. I should act on it, but I don't it is only in the back of my mind."*

> *"I am clued into climate change. I think about it, but it is not a massive concern to me."*

> *"Just not a consideration for me, I know it should be, but it is way down my list of priorities."*

"When I think about travel, I think of comfort and time, climate change doesn't come into it."

"We all have busy lives and I don't really think about it."

"Maybe it is selfish of me but I don't think about it, price means a lot"

Climate change was viewed by many consumers as someone else's responsibility, not an individual's duty, but a responsibility of governments, transport providers and manufacturing companies.

"For the most part it is corporations that cause the most pollution, but I do use public where possible."

"Climate change is for governments and business and transport operators to deal with. It is not up to me to try to change things unless I am forced to."

"Translink, trains should they be doing more to move from diesel engines."

"If it's something the government think they should do, if they're coming up with these figures about emissions and so on, if there is something they want us to achieve they should be billed for it, the little man can't afford it."

"We've really hurt the planet and we need to do our bit, but I don't see why we should try and fix it, compared to Russia, China we're nothing if they don't do their bit what's the point of buying these expensive electric cars."

Some consumers had thought about the possibility of having an EV. The lack of public charging points was a negative factor for some, but for most, the cost was too high unless big financial incentives were given.

"If I was changing my car I would think about an EV. As long as I could have a charging point at my house that would be enough, I only drive locally."

"If there was some incentive for changing your car I might think about an EV. We bought a car last year and our thinking was we have that until it is no longer road worthy. Now they're talking about these electric ones we will be at a loss so you'd need some incentive."

"If I was looking for an EV or hybrid I would be looking at it as a money saving thing, not from an environment point of view.

"The road tax on electric cars is free at the moment, but if everyone changed to them tax would go up on them."

2.4 The impact of Covid-19

Health and wellbeing were at the top of the list for consumers when it came to transport and the pandemic. Many consumers are not yet ready to share space on buses and trains for fear of catching Covid.

"As we said earlier getting on buses and people not wearing masks that will put me off right away. Know people out there are exempt but if I get on and someone out there is coughing I just want to get off."

"I know a lot of people who wouldn't get the bus or train it depends on your own personal point of view on it. I prefer to use my car when I can I haven't flown as frequently as I have been afraid to fly."

"Buses are far too packed and lots of people don't wear masks you never know what has been touched or what people are carrying."

"At the height of the pandemic I rarely used public transport, now I would still be wary."

"I love the social distancing and I love the mask wearing, I will now wear a more protective mask to protect myself, now that others are stopping masks."

"It is a company policy that we don't do car share like we used to in case we all catch Covid at the same time."

The same reticence applies to travel further afield.

> *"I honestly don't know about the likes of planes and flying. We are all a bit scared or wary sitting beside someone you don't know for 2 and a half hours."*

> *"We had a couple of scares with tickly throats or sore head and it makes the whole house paranoid. You are taking a risk to go away somewhere."*

> *"I was travelling to London a lot now work from home and that will remain the case (working from home). I'd be nervous how to travel since Covid and even when it is over, I have gone off being too close to a lot of people."*

> *"I would go on a plane, but my wife has lost confidence I don't think she will ever want to fly again."*

Many consumers had worked from home during the pandemic and most of them preferred to continue doing so. They could also see that businesses were benefitting from lower running costs with fewer people in the office and assumed that homeworking in some form would continue.

> *"A lot of people realised they don't have to go to work to go to work and they should, if you can do your job from home why get in a vehicle and drive 15 miles to an office?"*

> *"The commutes were mad here 45 minutes driving in each direction where could do the same thing from the house and not pay to heat a big office building."*

> *"I have been working from home and not spending as much time in the car and on planes. I don't think I will be going back and forward to London anymore; those meetings will be done by Zoom forever."*

> *"The importance of travel is not significant anymore. Online communications and Zoom have changed that permanently. We don't waste as much time sitting in traffic and travelling as we used*

2.5 Public transport changes that consumers expect to see in the future

Lower emissions transport is the main change that consumers expect to happen in the future. They expect that public transport will be powered by electricity or hydrogen and that, eventually, individual consumers will have to follow suit with their private transport

> *"Eventually the buses and that will go electric or hydrogen powered, but it will take an awful lot for it to happen. London buses are all electric.*

> *"I don't see the buses in rural parts being electric they will use those in town and keep long-range as diesel."*

> *"More environmentally friendly transport will be introduced in cities with electric first, but rural transport will take longer to change."*

> *"No more diesel or petrol cars. Petrol stations will close up and they will be filled with charging points instead."*

> *"The government will need to take the lead on greener transport and lead by example for people to follow with personal travel."*

Consumers think that there will be a shift away from private cars to public transport. Public transport, they say will work better and cycling will be promoted.

> *"More people will use public transport and will be better routes and less time consuming journeys."*

> *"The Glider route works well in Belfast and it will probably expand as more and more people move to public transport."*

> *"There will be more, and better, cycle lanes as the government encourages people to cycle more*."

As a result of the investments necessary to reduce carbon emissions, consumers also expect the cost of transport to increase.

> *"Travelling generally will become more expensive but more environmentally friendly."*

> *"Flights will become more expensive with the environment and the rise in the cost of fuel, and operators recouping losses after Covid."*

2.6 Public transport changes that consumers want to see in the future

Better connectivity and flexibility were consumers main hopes for public transport in the future. Bringing competition in from other transport providers was seen as a means by which this connectivity and flexibility could be provided. Belfast consumers would like to see routes that encircle the city as well as routes that take them into the centre.

> *"There should be a network of shuttle buses that go to certain places, shopping centres and hospitals. We need more choice of buses to meet people's need, smaller buses, more operators and shorter flexible runs."*

> *"I'd like to see competition for Translink on buses, they have a monopoly and that is never good. If we had more competition, maybe we could have more flexibility in bus and train routes so you don't have to always go into Belfast and out again."*

> *Regarding Translink I could be wrong, but I think Translink itself needs to do something, they can lose as much money as they like and Stormont pumps money into them. They never turn a profit so there is an issue there and no competition."*

> *"At Forestside you get off the bus and have to walk up the hill which is difficult with children or if you are disabled. We need a hop-on hop-off service that takes you closer to the Forestside entrance, otherwise, given the choice, people will just take the car."*

> *"Integrate our public transport systems, please. It's ridiculous at the moment, you should be able to get off a plane and onto a train."*

Outside of Belfast, consumers would like to have more frequent services, better bus shelters and, again, more competition from other providers.

> *"A pole with a sign is all at some of the stops in the country and no cover. Sometimes you have to wait much longer than you should and I've seen older people get on the bus freezing shivering from being out in the rain. It could be looked at to have more stops not just pole and a sign. Some of them you're standing on the road."*

> *"Out here there is only Translink so if you miss that there is nothing you can do. We have no other choices; maybe more competition would push Translink to come on time to get the custom."*

2.7 Private transport changes that consumers expect to see in the future

Consumers saw the future of private travel as being more active. Cycling, in particular is expected to rise in popularity. Walking is not generally seen as a travel option; it is viewed mainly as recreation or exercise.

> *"I think there'll be more walking and cycling too, they need more cycle lanes about and that would be really good."*

> *"I expect to see more physical modes of transport, mainly cycling. I definitely see more cyclists now; I think people took it up over lockdown and carried on."*

> *"We certainly will see more cycle lanes because cycling is the new walking now. I think they're going to put a big effort into that."*

Consumers also thought that price rises were inevitable through higher taxes, higher fuel prices and the cost of transport going electric.

"I suppose there will be more electric cars with prices going up of diesel. So there will be no choice but to go electric which wouldn't be a bad thing."

"I think that private transport will be hit heavily with tax. Private cars people that bought Teslas and those electric cars will be hit with tax on charge points in next 10 years."

"I think electric vehicles and transport will be used in the city when most effective. People will buy mor electric and hybrid, but it will cost us all; I can't see the government putting any money into it as Stormont is in a mess and England doesn't care".

"Insurance, petrol and diesel will all go up. It's getting very expensive to run a car. I think we will see more cycling and cycle lanes and a lot more people using and electric cars as well."

The number of people working from home during the pandemic is expected by consumers to remain high after the pandemic is over. Most of those working from home were saving on travel costs and did not want to return to travelling to the workplace.

"I am used to working from home now and I don't want to go back to paying all the costs of travel."

"My daughter worked in Belfast and found the monthly ticket was extortionate, now she works from home and it is a big saving. If she lost this job she would be looking for another work from home arrangement."

2.8 Private Transport Changes that consumers would like to see in the future

With the rise in the number of electric cars being seen as inevitable, consumers want to see a big improvement in the charging network. Consumers were also wary of having to bear the cost of greener transport and most felt that it was governments responsibility to bear the brunt of the cost.

"I think we need to see a big improvement in the charging infrastructure; not just a few here and there, but more and more. The government should really be over-providing charging points to give us confidence that there will be one there when we need it."

"I would need financial support to move to an electric car, the government can't expect us to take the hit. At the end of the day if you don't live in the city, you do need a car and buses can't take you everywhere. Realistically in the future I know I will need a car so I will need help to get an electric one."

"Another thing that could be introduced is, if they're forcing us to change to electric and we won't be able to drive petrol or diesel cars, they need to give a grant for the scrappage then allow discount for so many years until you're up and going in your electric car. Ordinary people can't afford the cost themselves without help."

"It's one thing the government saying that we all have to go electric, but I wouldn't be buying a brand-new car anyway, so I'm further down the food chain. I expect to be running a diesel car for many years yet and there needs to be maybe a cap on fuel charges, diesel and fuel for people like me."

Support for active travel would also be welcomed by consumers, particularly improvements in cycling lanes and cycling safety.

"I'd like to see encouraging a culture of walking cycling. If somewhere is within walking or cycling distance that's an option and then the car would only be the third thing you'd think of. This culture of jump in the car when you could really walk or cycle. It's that habit you get into; jump in the car, it's just a habit."

"Probably more cities should be pedestrian and cycle friendly rather than having all the cars and buses in it and that. A lot of pedestrian and cycle friendly areas around the actual cities too, we'd have less smog and that kind of thing."

Consumers expect that private cars will still be a common mode of transport in the future and would like to see some changes to parking rules and charges.

"Parking is so expensive, especially in airports. They just charge what they like because they know you have little choice, that needs to be targeted, it's a rip-off."

"Car parking charges are very high in the cities; I suppose it's to stop us taking polluting cars into town. But if we all go electric, then car parking should be made cheaper and car parks should have charging points installed in them."

"Stop people parking on footpaths, it is a problem for people with prams and the disabled."

2.9 Longer Range Transport: Changes that consumers expect to see in the future

Some consumers thought that the pandemic and a greater emphasis on carbon emissions had changed attitudes to foreign holidays and thought there would be fewer people wanting to travel abroad in the future. Consumers also expected that business travel would not go back to its pre-pandemic level.

"In the pandemic we started seeing more of our own beautiful country. That has changed for me anyway, I appreciate what we have in and around us we don't always have to travel around the world."

"We have holidayed the last 3 years in Ireland but never would have before. We will certainly do it again, no flights, no ferries."

"There is so much to see here, we don't need to go abroad anymore. I sent the link to my sister about Game of Thrones Museum in Banbridge, it's amazing."

"I haven't been away anywhere since Covid, I don't think I could be bothered with the hassle of going away again, Covid has changed us all."

"I think there will be fewer business flights in the future, a lot of companies use Zoom now instead, you don't need to rack up air miles anymore."

There was, however, a counter view from those who thought that there was a pent up wish to travel again to overseas holiday destinations.

"In the next few years think there will be an explosion of people travelling abroad. Those who haven't been in a few years. Once possible, people will be going everywhere."

"I would like to see it as easier to get on a plane, to fly without these restrictions of Covid passports and form filling. That would help a lot of people to want to travel a bit more."

Consumers also expected to see changes to air and sea transport in accordance with low carbon targets.

"We ought to see more fuel efficient planes and boats, most boats are diesel and most of the trains. If they're pressing people to buy electric cars why can't the government upgrade boats and trains and planes to something more efficient?"

"I think airplanes and stuff will have to make a change to emissions, people will still have to travel and still will once Covid is away; people will go back to Spain, Italy, Greece etc."

2.10 Longer Range Transport: Changes that consumers would like to see in the future

Those who had a desire to travel again would like to see Covid restrictions lifted so that they could travel abroad again without stress.

"I would love to get on either ferry or plane and head somewhere warm but at the moment wouldn't feel comfortable especially have to sit with a mask on in close contact with other people. People are going on holidays but for me isn't just the time yet."

"Wouldn't it be lovely, even America or something. I would like to have the enthusiasm again without the extra worry that Covid brought."

Some consumers would like to see changes in relation to longer range travel I terms of airline booking and airport security.

"Airline websites to be a lot clearer, I feel they put extras in. I know they had to make a lot of changes in the last few years to be fairer, but it is still very confusing."

"Staff in airports train and bus stations need to do much better helping disabled people. The worst is security at Belfast International, it can be very distressing for disabled people, they need to have more compassion and understanding."

2.11 Consumer protection

Most consumers had heard of the Consumer Council and felt that it is good to have some backing if a company did not deliver what they paid for and would not give them redress. The biggest concern was delayed or cancelled flights. Some thought that Brexit might result in a loss of rights and others said that the compensation process should be simplified.

"What happens now we are out of the EU; will we still have the protection if flights are delayed or cancelled?"

"I don't think I would be worried about short journeys, over longer journeys if things are delayed or flights cancelled you should be able to get your money back or compensated without loads of red tape."

"I would prefer something simpler in place as you never know. Say you get to Greece and there's a lockdown and you don't know where you stand. Am I covered or have to pay for hotels and that.

"There should have to be clearer guidelines. At the minute it is continuously changing and you don't know if you're covered or what injections are needed. I would like to have it clear in my head if something happens that I am covered."

3. Survey findings

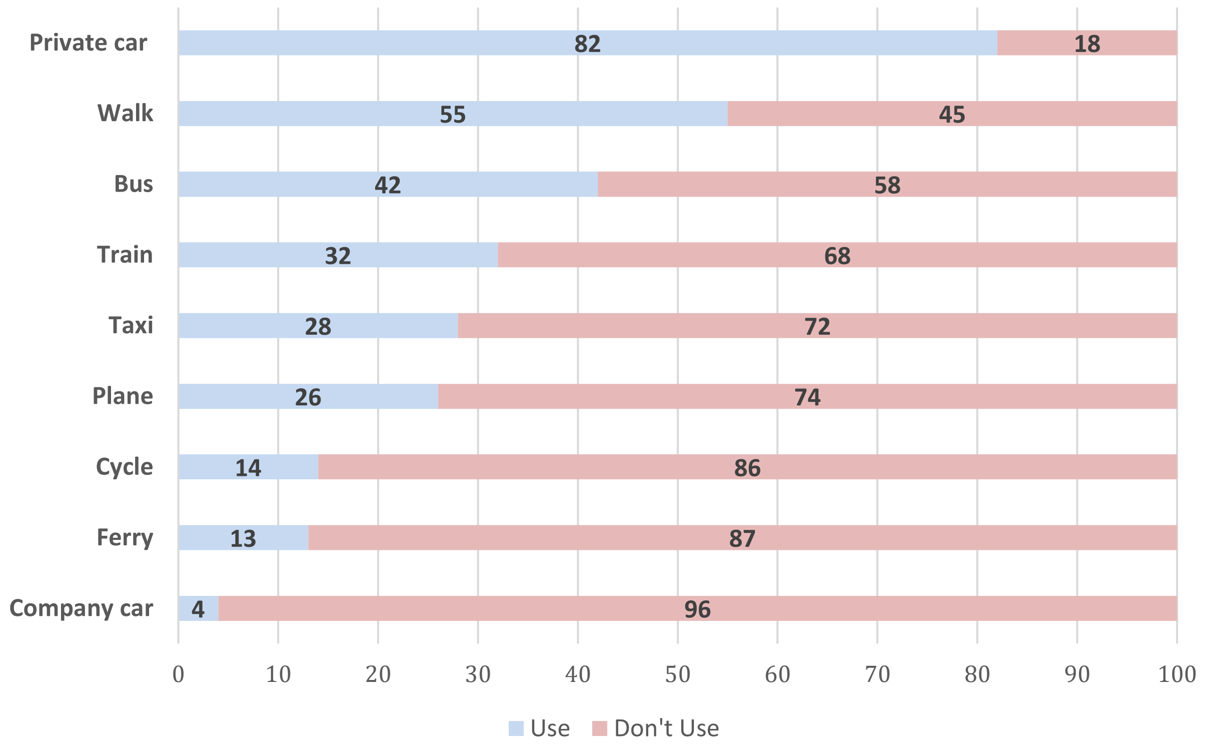
3.1 Use of different forms of transport

Respondents were asked about different forms of transport they use.

Figure 1 shows that 82% of consumers use a private car (82%), 55% said they walk, 42% use bus services, 32% use train services, and 28% use taxi services.

Relative to other forms of transport, consumers were less likely to use company cars (4%), ferries (13%), cycle (14%), and, planes (26%).

Figure 1: Use of different forms of transport. (base=1121)



Statistically significant differences

More likely to use private cars

- Those aged 35+ (18-34, 73%: 35-59, 85%: 60+, 86%)
- ABC1 consumers (90%) [C2DE, 74%]
- Economically active consumers (84% vs. 77%)
- Non-disabled consumers (85% vs. 77%)
- Those with a higher level of educational attainment (high, 89%: medium, 76%: low, 77%)
- Those on relatively higher incomes (<=£20K, 71%: 20K-£40K, 91%: £40K+, 92%)
- Those in rural areas (88% vs. 78%)
- Those living in Mid Ulster (90%) [compared to an average of 82% for all areas]

More likely to use a company car

- Men (7% vs. 2%)
- Those aged under 60 (16-34, 6%: 35-59, 5%: 60+, 0%)
- ABC1 consumers (8%) [C2DE, 1%]
- Economically active consumers (6% vs. 0%)
- Those on higher incomes (<=£20K, 1%: 20K-£40K, 5%: £40K+, 14%)
- Those in urban areas (6% vs. 2%)

More likely to use taxis

- ABC1 consumers (31%) [C2DE, 26%]
- Economically active consumers (6% vs. 0%)
- Those on higher incomes (<=£20K, 33%: 20K-£40K, 23%: £40K+, 38%)
- Those in urban areas (35% vs. 16%)
- Those living in Belfast (40%) [compared to an average of 28% for all areas]

More likely to use buses

- Younger and older consumers (16-34, 46%: 35-59, 36%: 60+, 47%)
- Those with relatively higher levels of educational attainment (high, 46%: medium, 46%: low, 32%)
- Those on higher incomes (<=£20K, 47%: 20K-£40K, 34%: £40K+, 51%)
- Those in urban areas (48% vs. 30%)
- Those living in Belfast (61%) [compared to an average of 42% for all areas]

More likely to use trains

- Younger and older consumers (16-34, 38%: 35-59, 25%: 60+, 40%)
- ABC1 consumers (38%) [C2DE, 28%]
- Those with a higher level of educational attainment (high, 39%: medium, 34%: low, 22%)
- Those on higher incomes (<=£20K, 33%: 20K-£40K, 28%: £40K+, 40%)
- Those in urban areas (36% vs. 25%)
- Those living in Mid and East Antrim (51%) [compared to an average of 22% for all areas]

More likely to use planes

- Men (30% vs. 22%)
- Older consumers (16-34, 22%: 35-59, 23%: 60+, 36%)
- ABC1 consumers (33%) [C2DE, 19%]
- Non-disabled consumers (29% vs. 22%)
- Those with a higher level of educational attainment (high, 31%: medium, 26%: low, 18%)
- Those on higher incomes (<=£20K, 25%: 20K-£40K, 24%: £40K+, 42%)

More likely to use ferries

- Older consumers (16-34, 10%: 35-59, 12%: 60+, 19%)
- ABC1 consumers (17%) [C2DE, 10%]
- Those with a relatively higher level of educational attainment (high, 16%: medium, 15%: low, 8%)
- Those on higher incomes (<=£20K, 25%: 20K-£40K, 24%: £40K+, 42%)

More likely to walk

- ABC1 consumers (60%) [C2DE, 49%]
- Non-disabled consumers (60% vs. 46%)
- Those with a higher level of educational attainment (high, 60%: medium, 54%: low, 48%)
- Those on higher incomes (<=£20K, 59%: 20K-£40K, 49%: £40K+, 62%)

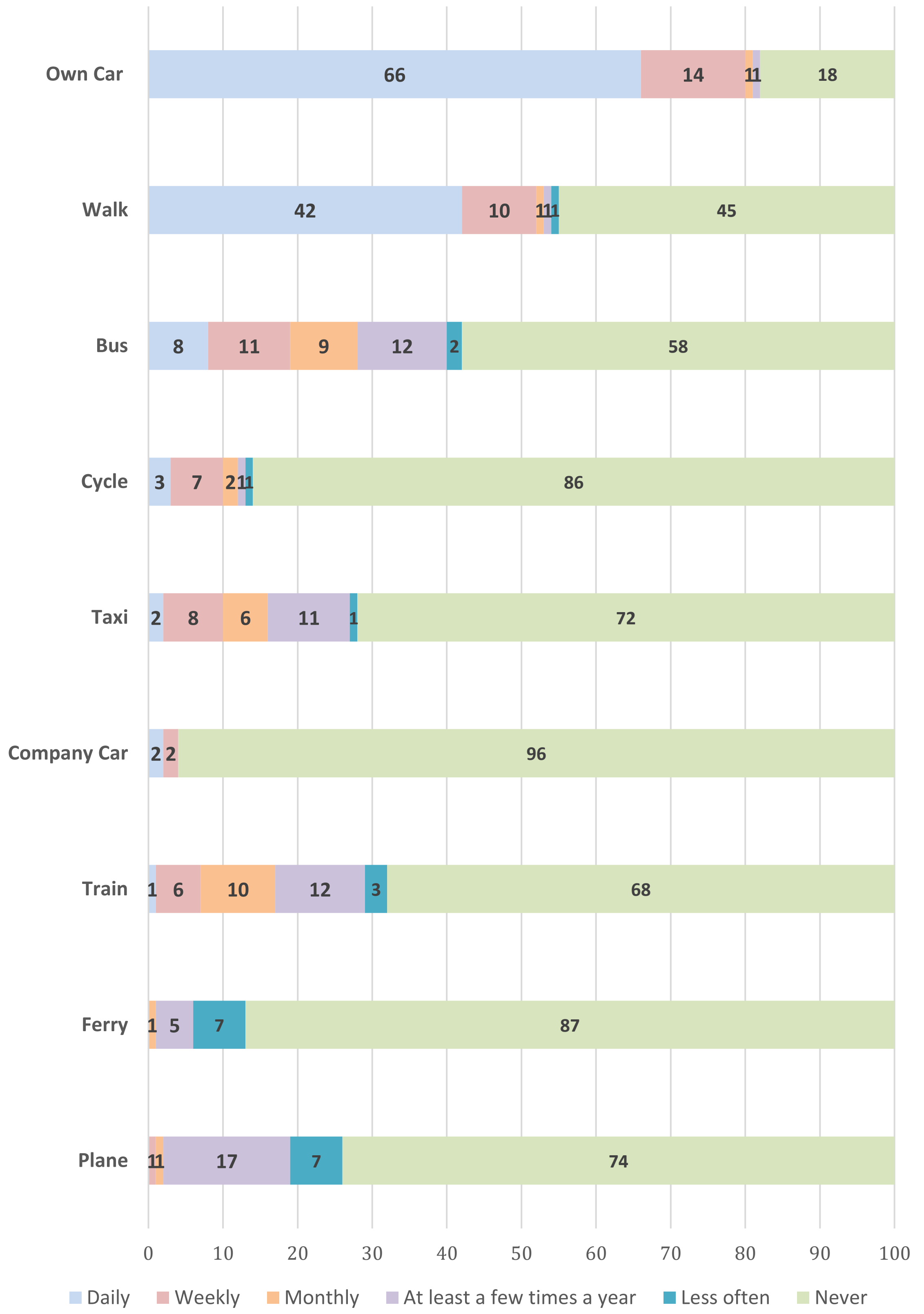
More likely to cycle

- Men (23% vs. 7%)
- Consumers aged under 60 (16-34, 18%: 35-59, 15%: 60+, 10%)
- ABC1 consumers (17%) [C2DE, 12%]
- Economically active consumers (17% vs. 10%)
- Non-disabled consumers (17% vs. 11%)
- Those with a higher level of educational attainment (high, 17%: medium, 10%: low, 14%)
- Those on higher incomes (<=£20K, 13%: 20K-£40K, 11%: £40K+, 29%)

3.1.1 Frequency of using different forms of transport

Figure 2 shows that consumers were more likely to use private cars on a daily basis (66%), 42% said they walk on a daily basis, 8% use bus services on a daily basis, and 3% cycle on a daily basis.

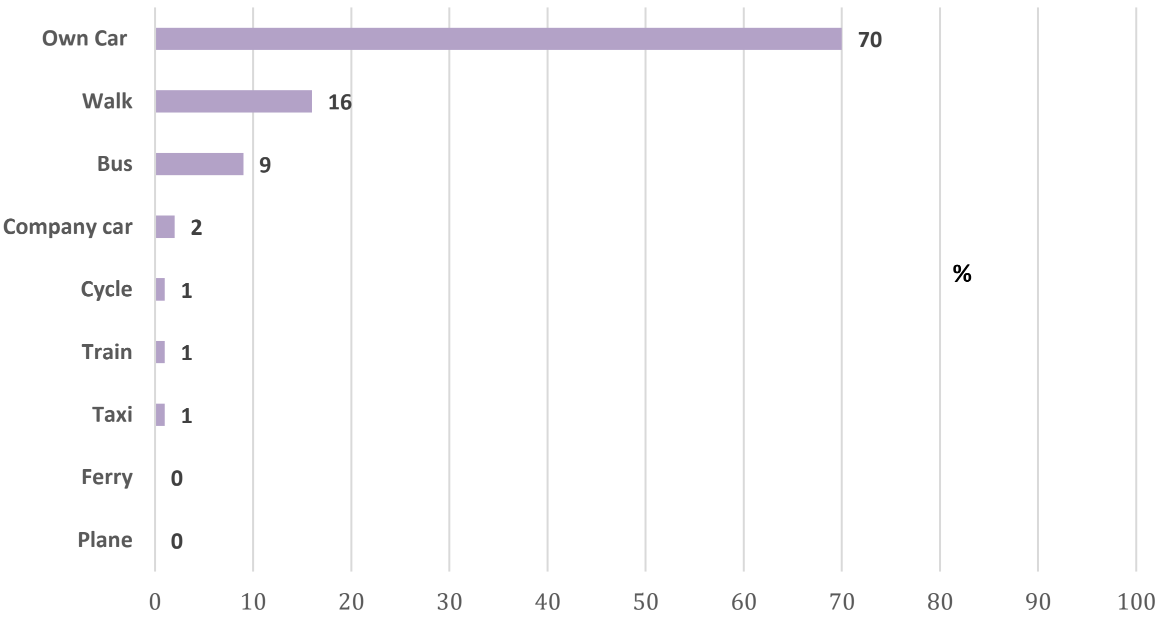
Figure 2: How often do you use the following forms of transport? (base=1121)



3.1.2 Form of transport used most often

Figure 3 shows that private cars (70%) are the form of transport that consumers take most often, followed by walking (16%), and taking the bus (9%). Relatively few consumers said they use other forms of transport most often.

Figure 3: Of the different forms of transport you, which do you use most often? (base=1001)



Statistically significant differences

Further analysis found that a greater proportion of those living in rural areas said they use the car most often (89% vs. 85%), with residents in Fermanagh and Omagh (91%) and Armagh City, Banbridge and Craigavon (91%), also more likely to say they use a car most often.

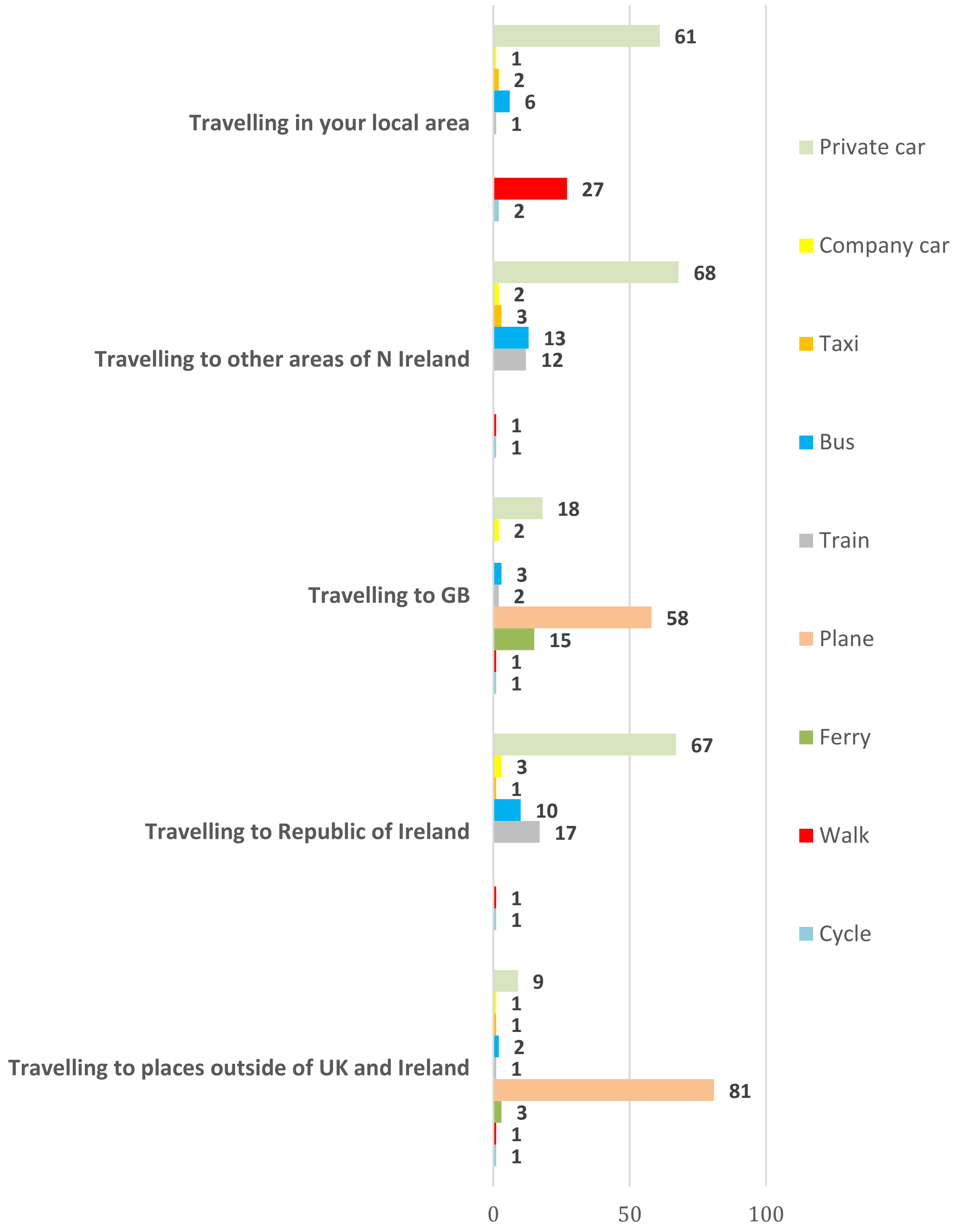
3.1.3 Form of transport used when travelling in different situations

Figure 4 shows the forms of transport that consumers use most often in different situations. Private car is the most common form of transport when consumers are travelling in their local area (61%) followed by walking (27%).

When travelling to other areas of NI, consumers most commonly do so by private car (68%), with the same true when travelling to the Republic of Ireland (67%).

Planes are most commonly used when travelling from NI to Great Britain (58%), with planes also most commonly used when travelling to places outside of the UK and Republic of Ireland (81%).

Figure 4: Please say which of the following forms of transport you would be most likely to use if you were travelling in the following situations? (base=1121)



3.2 Bus Services

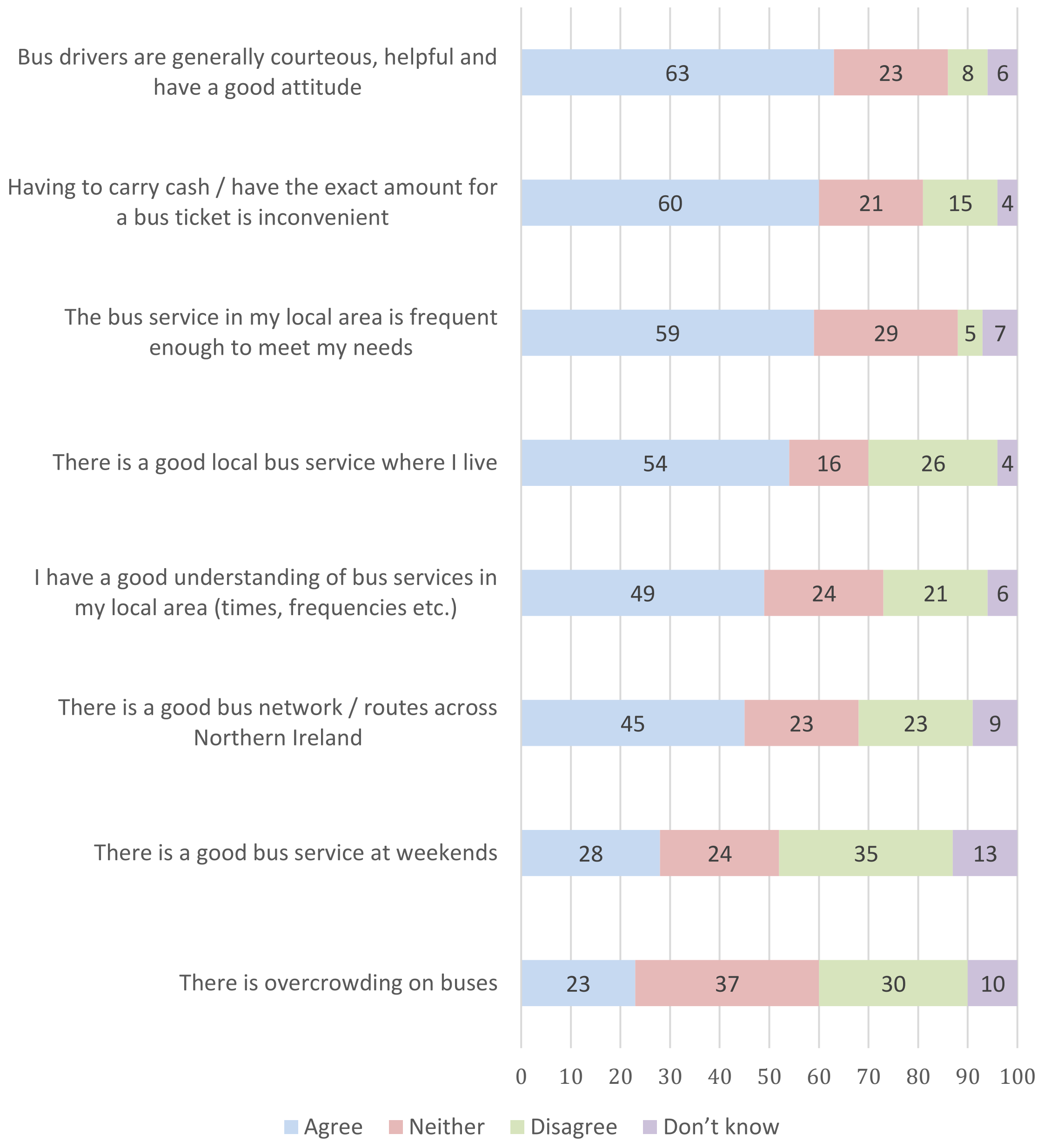
3.2.1 General views on bus services

Consumers were asked to say if they agreed or disagreed with a series of statements on bus services in NI.

Figure 5 shows that most consumers in Northern believe that bus drivers are generally courteous, helpful and have a good attitude (63%). However, most (60%) said that having to carry cash / have the exact amount for a bus ticket is inconvenient. Again in most cases, consumers said that the bus service in their local area is frequent enough to meet their needs (59%), with just over half saying that there is a good local bus service where they live (54%). Less than a quarter of consumers supported the view that buses are overcrowded (23%).

Just over a quarter of consumers believe there is a good bus service at weekends (28%), with just under half agreeing that there is a good bus network / routes across NI (45%). Almost half of consumers said they have a good understanding of bus services in their local area (49%).

Figure 5: Please say how much you agree or disagree with each of the following statements relating to bus services. (n=1121)



Statistically significant differences

Statement: *There is a good local bus service where I live*

- Bus service users were more likely to agree (68% vs. 44%)
- Men more were likely to agree (58% vs. 51%)
- ABC1 consumers were more likely to disagree (29%) [C2DE, 23%]
- Economically active consumers were more likely to disagree (29% vs. 19%)
- Those with a higher level of educational attainment more likely to disagree (high, 35%: medium, 21%: low, 18%)
- Those in urban areas were more likely to agree (64% vs. 35%) [46% in rural areas disagreed: urban, 16%]
- Those living in Fermanagh & Omagh were more likely to disagree (46%) [compared to an average of 26% for all areas]

Statement: *The bus service in my local area is frequent enough to meet my needs*

- Bus service users were more likely to agree (66% vs. 55%)
- Women were more likely to agree (62% vs. 57%)
- Younger consumers were more likely to agree (16-34, 69%: 35-59, 60%: 60+, 47%)
- Economically active consumers were more likely to agree (65% vs. 49%)
- Better educated consumers were more likely to agree (high, 63%: medium, 60%: low, 54%)
- Those in urban areas were more likely to neither agree nor disagree (31% vs. 26%)
- Those living in Fermanagh & Omagh were more likely to agree (77%) [compared to an average of 59% for all areas]

Statement: *I have a good understanding of bus services in my local area (times, frequencies etc.)*

- Bus service users were more likely to agree (69% vs. 34%)
- ABC1 consumers were more likely to agree (52%) [C2DE, 46%]
- Economically active consumers were more likely to agree (50% vs. 45%)
- Those with a higher level of educational attainment were more likely to agree (high, 53%: medium, 48%: low, 44%)
- Those in rural areas were more likely to disagree (25% vs. 19%)
- Those living in Belfast were more likely to agree (66%) [Fermanagh & Omagh were more likely to disagree, 33%]

Statement: *There is a good bus service at weekends*

- Bus service users were more likely to agree (38% vs. 21%)
- Men were more likely to agree (34% vs. 23%)
- Younger consumers were more likely to agree (16-34, 34%: 35-59, 27%: 60+, 25%)
- ABC1 consumers were more likely to disagree (39%) [C2DE, 31%]
- Economically active consumers were more likely to disagree (38% vs. 29%)
- Better educated consumers were more likely to disagree (high, 44%: medium, 29%: low, 28%)
- Those in urban areas were more likely to agree (34% vs. 18%) [47% in rural areas disagreed: urban, 28%]
- Those living in Belfast were more likely to agree (47%) [Fermanagh & Omagh were more likely to disagree, 58%]

Statement: *There is a good bus network / routes across NI*

- Bus service users were more likely to agree (52% vs. 40%)
- Older consumers were more likely to say they don't know (16-34, 5%: 35-59, 9%: 60+, 16%)
- ABC1 consumers were more likely to disagree (29%) [C2DE, 17%]
- Economically active consumers were more likely to disagree (27% vs. 15%)
- Consumers with a disability were more likely to agree (50% vs. 42%)
- Better educated consumers were more likely to disagree (high, 34%: medium, 17%: low, 13%)
- Higher income consumers were more likely to disagree (<=£20K, 17%:20K-£40K, 27%: £40K+, 32%)
- Those in urban areas were more likely to agree (48% vs. 39%) [29% in rural areas disagreed: urban, 20%]
- Those living in Derry / Strabane were more likely to agree (57%) [Fermanagh & Omagh were more likely to disagree, 34%]

Statement: *Bus drivers are generally courteous, helpful and have a good attitude*

- Bus service users were more likely to agree (71% vs. 56%)
- Older consumers were more likely to agree (16-34, 62%: 35-59, 57%: 60+, 73%)
- ABC1 consumers were more likely to agree (67%) [C2DE, 58%]
- Better educated consumers were more likely to disagree (high, 66%: medium, 62%: low, 60%)
- Lower income consumers were more likely to agree (<=£20K, 70%:20K-£40K, 60%: £40K+, 63%)
- Those in rural areas were more likely to agree (66% vs. 60%)
- Newry, Mourne and Down residents were more likely to agree (76%) [Belfast were more likely to disagree, 13%]

Statement: *Having to carry cash / have the exact amount for a bus ticket is inconvenient*

- Younger consumers were more likely to agree (16-34, 72%: 35-59, 57%: 60+, 50%)
- ABC1 consumers were more likely to disagree (66%) [C2DE, 54%]
- Economically active consumers were more likely to disagree (63% vs. 54%)
- Disabled consumers less likely to agree (55% vs. 63%)
- Newry, Mourne and Down residents were more likely to agree (73%) [Fermanagh & Omagh were more likely to disagree, 48%]

Statement: *There is overcrowding on buses*

- Bus service users were more likely to disagree (39% vs. 24%)
- Younger consumers were more likely to agree (16-34, 30%: 35-59, 25%: 60+, 12%)
- Consumers with a disability were more likely to agree (28% vs. 20%)
- Those in urban areas were more likely to agree (26% vs. 16%) [35% in rural areas disagreed: urban, 28%]
- Economically active consumers were more likely to disagree (63% vs. 54%)
- Disabled consumers less likely to agree (55% vs. 63%)
- Ards and North Down residents were more likely to agree (33%) Antrim and Newtownabbey were more likely to disagree, 39%]

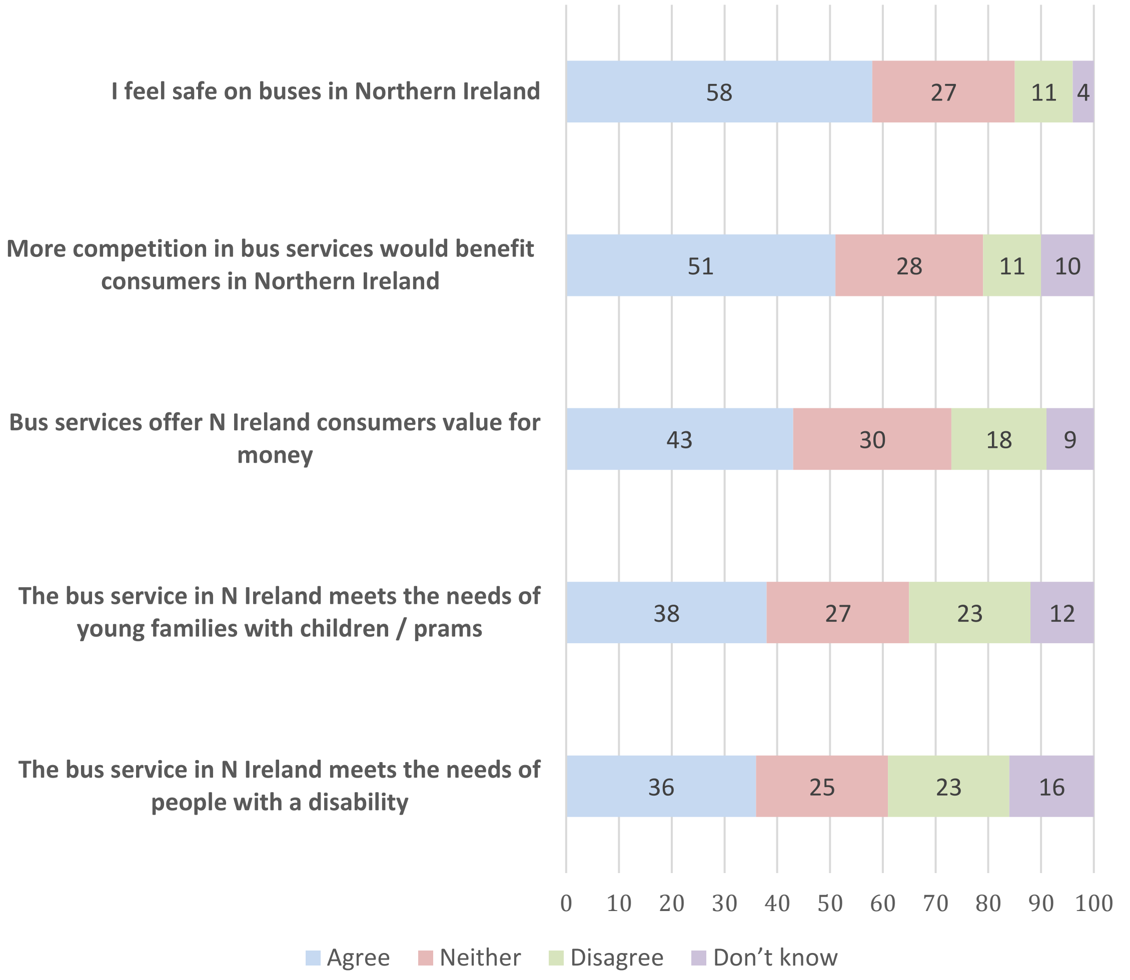
3.2.2 Specific views on bus services

Again, consumers were asked to say if they agreed or disagreed with a series of statements on specific issues relating to bus services.

Figure 6 shows that a majority (58%) said they feel safe on buses (11% said they do not feel safe), with just over half agreeing that more competition in bus services would benefit consumers in NI.

Less than half (43%) of consumers surveyed believe that bus services offer NI consumers value for money, with similar numbers agreeing that the bus service meets the needs of young families with children / prams (38%) and the bus service in NI meets the needs of people with a disability (36%).

Figure 6: Please say how much you agree or disagree with each of the following statements relating to bus services. (n=1121)



Statistically significant differences

Statement: *The bus service in NI meets the needs of people with a disability*

- Bus service users were more likely to agree (44% vs. 30%)
- Men were more likely to agree (39% vs. 41%) [women were more likely to disagree, 27% vs. 19%]
- Older consumers were more likely to disagree know (16-34, 18%: 35-59, 24%: 60+, 26%)
- Disabled consumes were more likely to disagree (30% vs. 19%)
- Better educated consumers were more likely to disagree (high, 26%: medium, 20%: low, 22%)
- Those in urban areas were more likely to agree (39% vs. 30%) [27% in rural areas disagreed: urban, 21%]
- Those living in Derry / Strabane were more likely to agree (58%) [Mid and East Antrim were more likely to disagree, 38%]

Statement: *The bus service in NI meets the needs of young families with children / prams*

- Bus service users were more likely to agree (46% vs. 32%)
- Men were more likely to agree (41% vs. 35%) [women were more likely to disagree, 29% vs. 16%]
- Younger consumers were more likely to agree know (16-34, 48%: 35-59, 32%: 60+, 38%)
- Those with dependent children under the age of 16 were more likely to disagree (27% vs. 21%)
- Those in urban areas were more likely to agree (39% vs. 30%) [27% in rural areas disagreed: urban, 21%]
- Those living in Derry / Strabane were more likely to agree (57%) [Fermanagh and Omagh were more likely to disagree, 35%]

Statement: *I feel safe on buses in NI*

- Bus service users were more likely to agree (70% vs. 49%)
- Older consumers were more likely to agree know (16-34, 58%: 35-59, 51%: 60+, 70%)
- Consumers with a disability were less likely to agree (53% vs. 61%)
- Those in urban areas were more likely to agree (39% vs. 30%) [27% in rural areas disagreed: urban, 21%]
- Those living in Derry / Strabane were more likely to agree (77%) [Mid Ulster were more likely to disagree, 20%]

Statement: *Bus services offer NI consumers value for money*

- Bus service users were more likely to agree (56% vs. 34%)
- ABC1 consumers were more likely to disagree (22%) [C2DE, 15%]
- Those with a higher level of educational attainment were more likely to disagree (high, 25%: medium, 15%: low, 12%)
- Economically active consumers were more likely to disagree (63% vs. 54%)
- Disabled consumers less likely to agree (55% vs. 63%)
- Those living in Derry / Strabane were more likely to agree (61%) [Lisburn & Castlereagh were more likely to disagree, 21%]

Statement: *More competition in bus services would benefit consumers in NI*

- Bus service users were more likely to disagree (15% vs. 8%)
- Men were more likely to agree (54% vs. 48%) [women were more likely to disagree, 29% vs. 16%]
- Consumers aged under 60 were more likely to agree (16-34, 51%: 35-59, 55%: 60+, 43%)
- ABC1 consumers were more likely to agree (56%) [C2DE, 46%]
- Economically active consumers were more likely to agree (56% vs. 41%)
- Higher income consumers were more likely to agree (<=£20K, 45%: 20K-£40K, 52%: £40K+, 56%)
- Lisburn & Castlereagh were more likely to agree (61%) [Belfast were more likely to disagree, 19%]

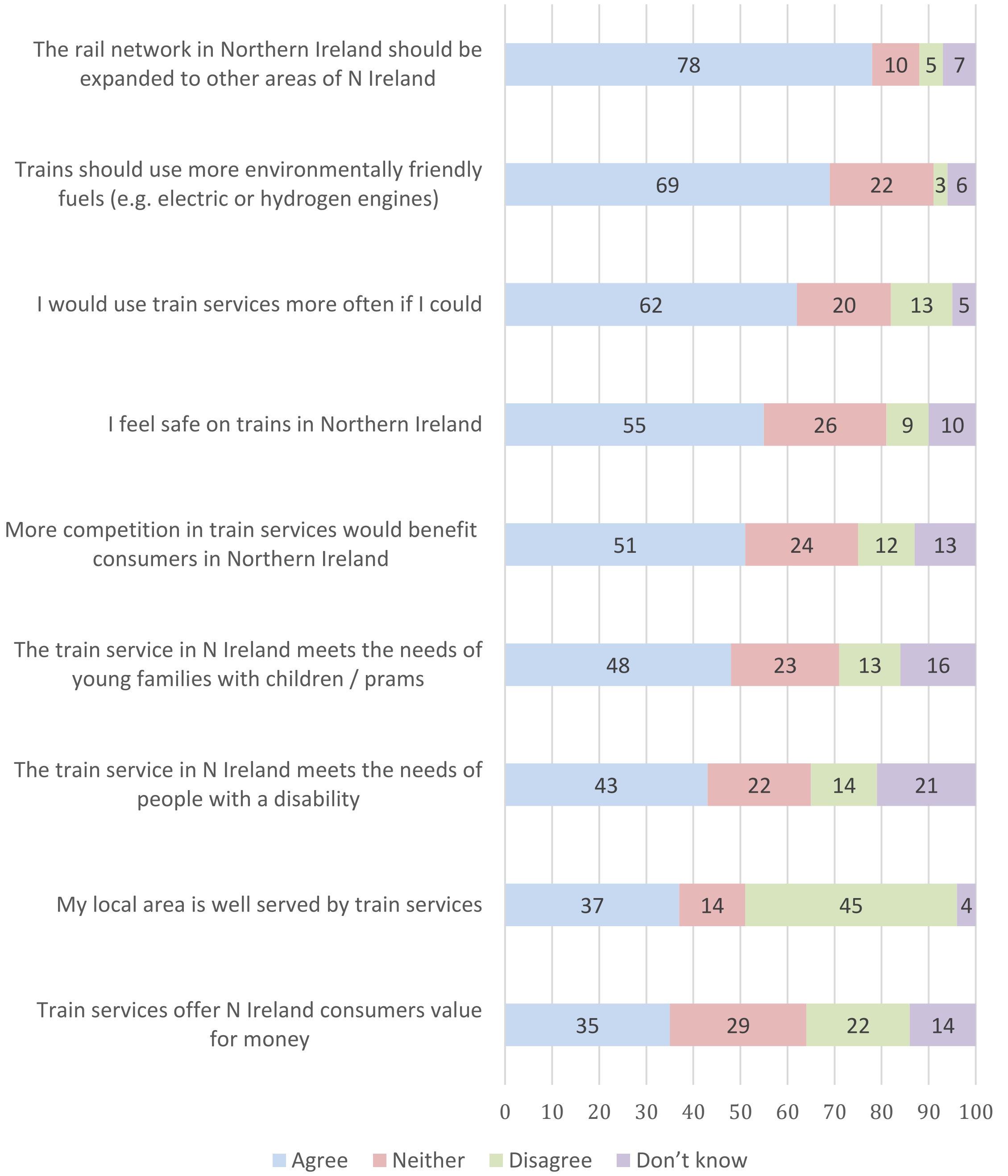
3.3 Train Services

Consumers were asked to say if they agreed or disagreed with a series of statements about train services in NI.

Figure 7 shows that 78% of consumers believe that the rail network in NI should be expanded to other areas of NI, 69% agreed that trains should use more environmentally friendly fuels, and 62% agree they would use train services more often if they could. Just over half (55%) said they feel safe on trains, with 51% saying that more competition in train services would benefit consumers.

In contrast fewer consumers believed that train services in NI offer value for money (35%), with 37% saying their local area is well served by trains. Less than half (43%) of consumers believe that train services in NI meet the needs of people with a disability, and that train services in NI meet the needs of young families with children / prams (48%).

Figure 7: Please say how much you agree or disagree with each of the following statements relating to train services. (n=1121)



Statistically significant differences

Statement: *My local area is well served by train services*

- Train users were more likely to agree (51% vs. 30%)
- Men were more likely to agree (40% vs. 35%) [women were more likely to disagree, 48% vs. 43%]
- Younger consumers were more likely to agree (16-34, 42%: 35-59, 36%: 60+, 34%)
- ABC1 consumers were more likely to disagree (50%) [C2DE, 41%]
- Economically active consumers were more likely to agree (40% vs. 31%)
- Those in urban areas were more likely to agree (46% vs. 21%) [62% in rural areas disagreed: urban, 36%]
- Mid and East Antrim were more likely to agree (55%) [Fermanagh & Omagh were more likely to disagree, 88%]

Statement: *Train services offer NI consumers value for money*

- Train users were more likely to agree (50% vs. 27%)
- Women were more likely to agree (37% vs. 32%) [men were more likely to disagree, 25% vs. 20%]
- Younger consumers were more likely to agree (16-34, 40%: 35-59, 31%: 60+, 34%)
- ABC1 consumers were more likely to disagree (27%) [C2DE, 18%]
- Economically active consumers were more likely to disagree (27% vs. 18%)
- Better educated consumers were more likely to disagree (high, 29%: medium, 16%: low, 19%)
- Antrim & Newtownabbey were more likely to agree (49%) [Mid and East Antrim were more likely to disagree, 34%]

Statement: *I would use train services more often if I could*

- Train users were more likely to agree (72% vs. 57%)
- Women were more likely to agree (66% vs. 57%)
- ABC1 consumers were more likely to agree (69%) [C2DE, 55%]
- Economically active consumers were more likely to agree (64% vs. 57%)
- Those with a higher level of educational attainment were more likely to agree (high, 71%: medium, 58%: low, 54%)
- Fermanagh & Omagh were more likely to agree (76%) [Mid and East Antrim and Mid Ulster were more likely to disagree, 23%]

Statement: *The rail network in NI should be expanded to other areas of NI*

- Train users were more likely to agree (83% vs. 77%)
- Women were more likely to agree (83% vs. 74%)
- Older consumers were more likely to agree (16-34, 71%: 35-59, 79%: 60+, 87%)
- ABC1 consumers were more likely to agree (84%) [C2DE, 74%]
- Those with a higher level of educational attainment were more likely to agree (high, 85%: medium, 77%: low, 73%)
- Those in rural areas were more likely to agree (83% vs. 77%)
- Fermanagh & Omagh were more likely to agree (94%) [Mid and East Antrim were more likely to disagree, 13%]

Statement: *Trains should use more environmentally friendly fuels (e.g. electric or hydrogen engines)*

- Men were more likely to agree (73% vs. 65%)
- Older consumers were more likely to agree (16-34, 65%: 35-59, 70%: 60+, 72%)
- ABC1 consumers were more likely to agree (72%) [C2DE, 66%]
- Those with higher levels of educational attainment were more likely to agree (high, 71%: medium, 73%: low, 62%)
- Those in rural areas were more likely to agree (83% vs. 77%)
- Derry & Strabane residents were more likely to agree (83%)

Statement: *The train service in NI meets the needs of people with a disability*

- Train users were more likely to agree (55% vs. 38%)
- Men were more likely to agree (48% vs. 38%)
- Younger consumers were more likely to agree (16-34, 49%: 35-59, 45%: 60+, 34%)
- Economically active consumers were more likely to agree (48% vs. 34%)
- Consumers with a disability were more likely to disagree (18% vs. 12%) [agree, 38% vs. 47%]
- Those in urban areas were more likely to agree (47% vs. 37%)
- Antrim & Newtownabbey were more likely to agree (56%) [Mid Ulster were more likely to disagree, 26%]

Statement: *The train service in NI meets the needs of young families with children / prams*

- Train users were more likely to agree (61% vs. 42%)
- Younger consumers were more likely to agree (16-34, 53%: 35-59, 49%: 60+, 42%)
- Those with dependent children were more likely to disagree (16% vs. 12%)
- Economically active consumers were more likely to agree (50% vs. 44%)
- Consumers with a disability were less likely to agree (43% vs. 52%)
- Those in urban areas were more likely to agree (52% vs. 41%)
- Derry & Strabane residents were more likely to agree (62%) [Mid & East Antrim were more likely to disagree, 24%]

Statement: *I feel safe on trains in NI*

- Train users were more likely to agree (68% vs. 49%)
- Older consumers were more likely to agree (16-34, 56%: 35-59, 51%: 60+, 61%)
- Consumers with a disability less likely to agree (48% vs. 60%) [disagree, 12% vs. 7%]
- Those with a higher level of educational attainment were more likely to agree (high, 63%: medium, 54%: low, 46%)
- Ards and North Down residents were more likely to agree (71%) [Mid & East Antrim were more likely to disagree, 21%]

Statement: *More competition in train services would benefit consumers in NI*

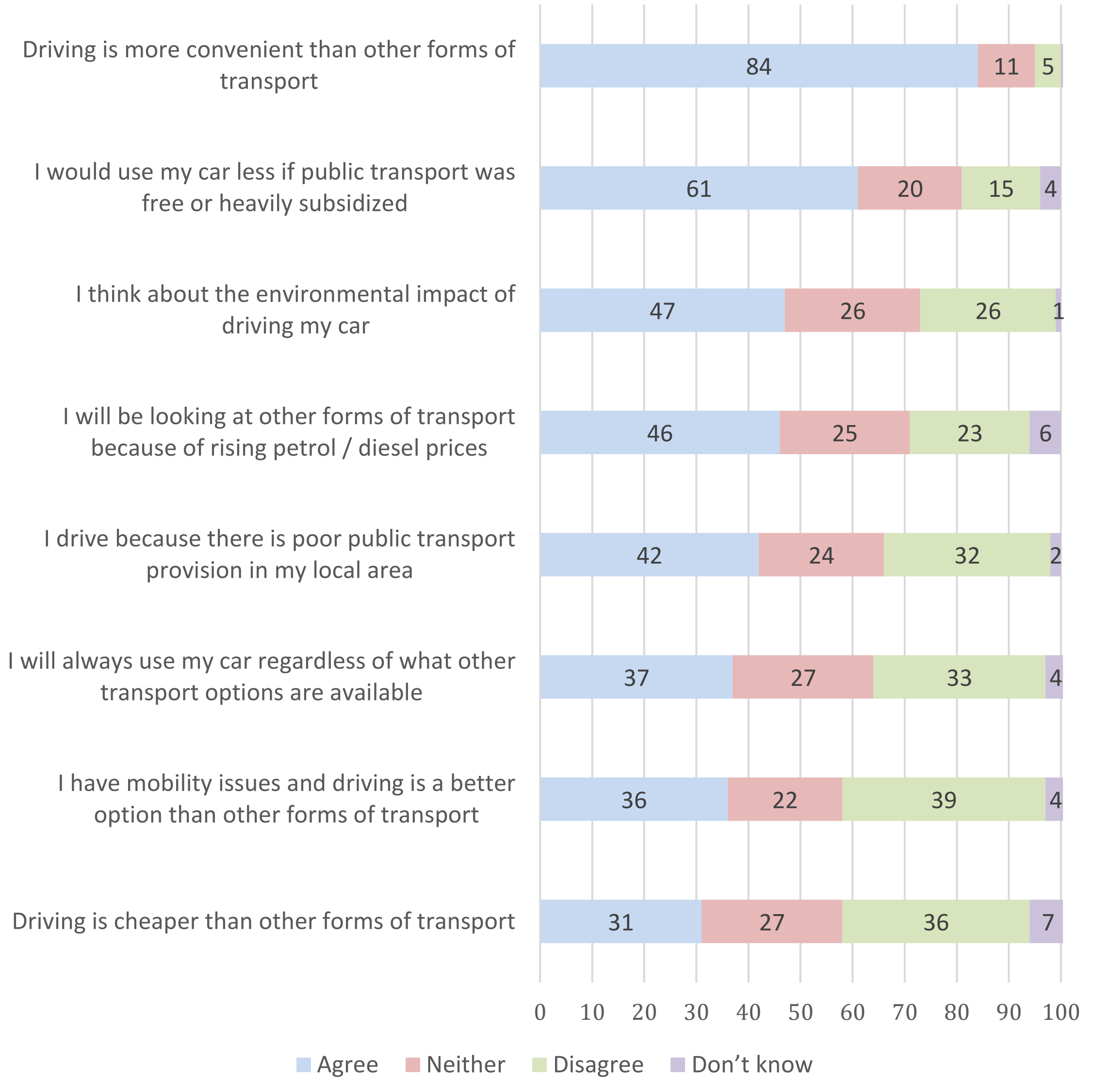
- Train users were more likely to disagree (18% vs. 9%)
- Consumers aged under 60 were more likely to agree (16-34, 48%: 35-59, 58%: 60+, 43%)
- ABC1 consumers were more likely to agree (56%) [C2DE, 46%]
- Those with a higher level of educational attainment were more likely to agree (high, 56%: medium, 46%: low, 48%)
- Higher income consumers were more likely to agree (<=£20K, 42%:20K-£40K, 54%: £40K+, 59%)
- Lisburn and Castlereagh residents were more likely to agree (64%) [Belfast were more likely to disagree, 19%]

3.4 Using private cars

Consumers were asked to say if they agreed or disagreed with a series of statements about issues relating to private cars.

Figure 8 shows that more than eight out of ten consumers said that driving is more convenient than other forms of transport (84%), with 61% saying they would use their car less if public transport was free or heavily subsidised. Relative to other issues, fewer consumers agreed that driving is cheaper than other forms of transport (36%), with 36% saying they have mobility issues and driving is better than other forms of transport.

Figure 8: Please say how much you agree or disagree with each of the following statements relating to private cars. (n=1121)



Statistically significant differences

Statement: *Driving is more convenient than other forms of transport*

- Car users were more likely to agree (87% vs. 64%)
- ABC1 consumers were more likely to agree (87%) [C2DE, 80%]
- Those with a higher level of educational attainment were more likely to agree (high, 88%: medium, 81%: low, 80%)
- Fermanagh & Omagh residents were more likely to agree (93%) [Antrim & Newtownabbey were more likely to disagree, 8%]

Statement: *I have mobility issues and driving is a better option than other forms of transport*

- Car users were more likely to disagree (40% vs. 28%)
- Older consumers were more likely to agree (16-34, 22%: 35-59, 34%: 60+, 51%)
- C2DE consumers were more likely to agree (43%) [ABC1, 28%]
- Economically inactive consumers were more likely to agree (57% vs. 25%)
- Consumers with a disability were more likely to agree (70% vs. 11%) [disagree, 11% vs. 59%]
- Those with a lower level of educational attainment were more likely to agree (high, 29%: medium, 34%: low, 45%)
- Armagh City, Banbridge and Craigavon residents were more likely to agree (48%) Newry, Mourne and Down were more likely to disagree, 53%]

Statement: *I drive because there is poor public transport provision in my local area*

- Car users were more likely to agree (43% vs. 34%)
- Economically active consumers were more likely to agree (46% vs. 34%)
- Consumers with a disability were less likely to agree (39% vs. 43%)
- Those with a higher level of educational attainment were more likely to agree (high, 50%: medium, 33%: low, 39%)
- Higher income consumers were more likely to agree (<=£20K, 36%:20K-£40K, 43%: £40K+, 53%)
- Those in rural areas were more likely to agree (60% vs. 32%) [urban were more likely to disagree, 42% vs. 15%]
- Fermanagh & Omagh residents were more likely to agree (75%) [Belfast more likely to disagree, 52%]

Statement: *Driving is cheaper than other forms of transport*

- Men were more likely to agree (37% vs. 25%)
- Older consumers were more likely to disagree (16-34, 33%: 35-59, 32%: 60+, 44%)
- Economically active consumers were more likely to agree (34% vs. 23%)
- Consumers with a disability were less likely to agree (39% vs. 43%)
- Those with a higher level of educational attainment were more likely to disagree (high, 41%: medium, 33%: low, 30%)
- Mid and East Antrim residents were more likely to agree (40%) [Fermanagh & Omagh more likely to disagree, 53%]

Statement: *I will be looking at other forms of transport because of rising petrol / diesel prices*

- Economically active consumers were more likely to disagree (24% vs. 20%)
- Relatively better educated consumers were more likely to agree (high, 49%: medium, 51%: low, 38%)
- Antrim & Newtownabbey residents were more likely to agree (58%) [Lisburn & Castlereagh more likely to disagree, 38%]

Statement: *I think about the environmental impact of driving my car*

- Car users were more likely to disagree (27% vs. 8%)
- Younger consumers were more likely to agree (16-34, 52%: 35-59, 47%: 60+, 44%)
- Economically active consumers were more likely to disagree (28% vs. 22%)
- Consumers with a disability were less likely to agree (39% vs. 43%)
- Those with a higher level of educational attainment were more likely to agree (high, 50%: medium, 33%: low, 39%)
- Higher income consumers were more likely to agree (<=£20K, 36%:20K-£40K, 43%: £40K+, 53%)
- Newry, Mourne and Down residents were more likely to agree (62%) [Mid Ulster more likely to disagree, 51%]

Statement: *I will always use my car regardless of what other transport options are available*

- C2DE consumers were more likely to agree (41%) [ABC1, 33%]
- Those in urban areas were more likely to agree (40% vs. 31%) [rural more likely to disagree, 38% vs. 30%]
- Armagh City, Banbridge & Craigavon residents were more likely to agree (47%) [Newry, Mourne & Down more likely to disagree, 50%]

Statement: *I would use my car less if public transport was free or heavily subsidized*

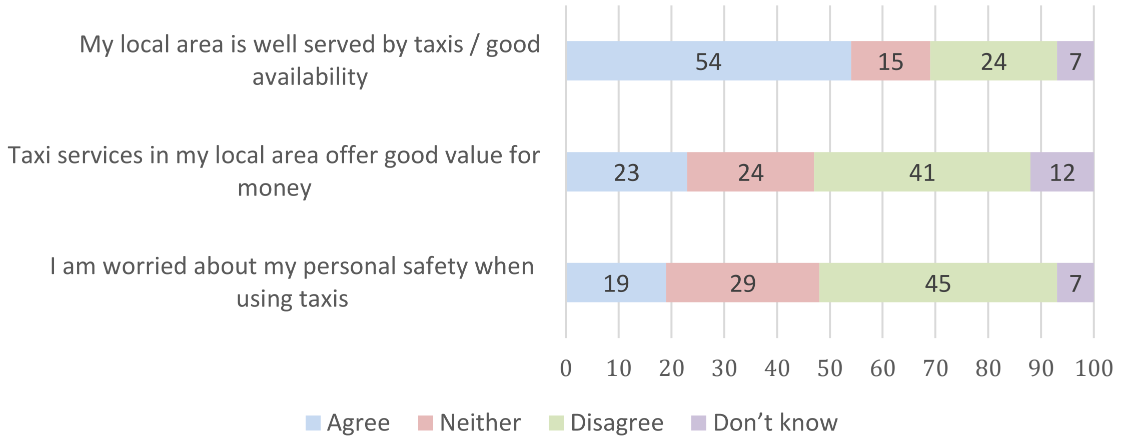
- Car users were more likely to disagree (61% vs. 50%)
- Consumers aged under 60 were more likely to agree (16-34, 68%: 35-59, 66%: 60+, 44%)
- ABC1 consumers were more likely to agree (65%) [C2DE, 56%]
- Economically active consumers were more likely to agree (68% vs. 45%)
- Consumers with a disability were less likely to agree (54% vs. 64%)
- Those with a higher level of educational attainment were more likely to agree (high, 65%: medium, 58%: low, 55%)
- Higher income consumers were more likely to agree (<=£20K, 36%:20K-£40K, 43%: £40K+, 53%)
- Those in rural areas were more likely to agree (60% vs. 32%) [urban more likely to disagree, 42% vs. 15%]
- Fermanagh & Omagh residents were more likely to agree (62%) [Lisburn & Castlereagh more likely to disagree, 22%]

3.5 Using taxi services

Consumers were asked to say if they agreed or disagreed with a series of statements about issues relating to taxi services.

Figure 9 shows that just over half (54%) of consumers agreed that their local area is well served by taxis / good availability, 23% said taxi services in their local area offer good value for money, and 19% said they are worried about their personal safety when using taxis.

Figure 9: Please say how much you agree or disagree with each of the following statements relating to taxi services. (n=1121)



Statistically significant differences

Statement: *My local area is well served by taxis / good availability*

- Taxi users were more likely to agree (69% vs. 48%)
- Economically active consumers were more likely to disagree (26% vs. 20%)
- Better educated consumers were more likely to disagree (high, 28%: medium, 16%: low, 23%)
- Those in urban areas were more likely to agree (66% vs. 33%) [rural more likely to disagree, 40% vs. 15%]
- Belfast residents were more likely to agree (71%) [Fermanagh & Omagh and Causeway Coast and Glens more likely to disagree, 33%]

Statement: *Taxi services in my local area offer good value for money*

- Taxi users were more likely to agree (32% vs. 19%)
- Younger consumers were more likely to agree (16-34, 30%: 35-59, 22%: 60+, 15%)
- Those with a higher level of educational attainment less likely to agree (high, 18%: medium, 29%: low, 24%)
- Those in urban areas were more likely to agree (26% vs. 15%) [rural more likely to disagree, 45% vs. 40%]
- Derry and Strabane were more likely to agree (42%) [Mid and East Antrim more likely to disagree, 57%]

Statement: *I am worried about my personal safety when using taxis*

- Taxi users were more likely to disagree (62% vs. 39%)
- Women were more likely to agree (21% vs. 17%) [men were more likely to disagree, 50% vs. 41%]
- Younger consumers were more likely to agree (16-34, 28%: 35-59, 17%: 60+, 13%)
- Economically active consumers were more likely to disagree (48% vs. 40%)
- Consumers with a disability were more likely to agree (25% vs. 16%)
- Those in urban areas were more likely to disagree (47% vs. 41%)
- Antrim and Newtownabbey residents were more likely to agree (33%) [Fermanagh & Omagh and Ards and North Down more likely to disagree, 54%]

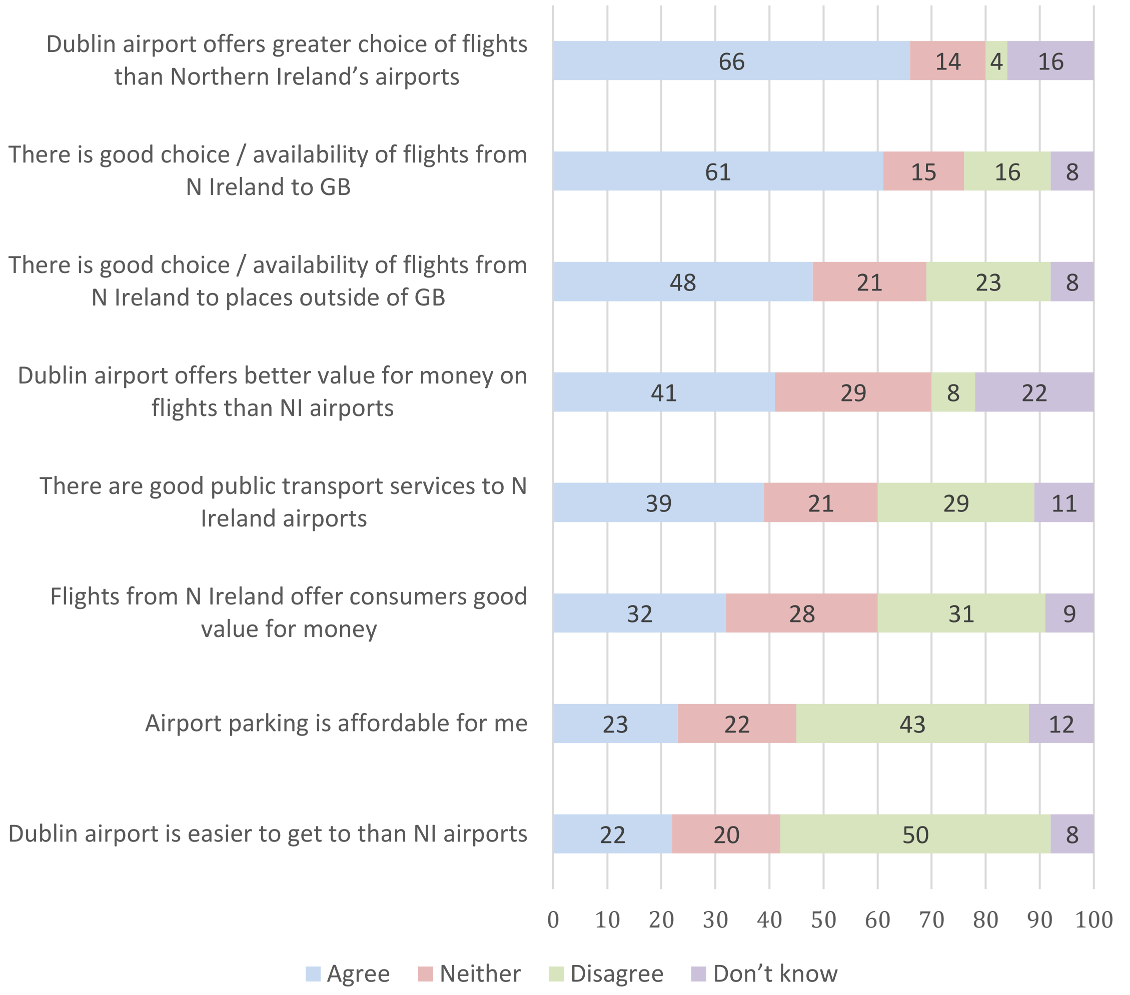
3.6 Airline services

Consumers were asked to say if they agreed or disagreed with a series of statements about issues relating to airline services.

Figure 10 shows that two out of three (66%) consumers believe that Dublin airport offers greater choice of flights than NI airports, with 61% agreeing that there is good choice / availability of flights from NI to Great Britain.

Relatively fewer consumers agreed that Dublin airport is easier to get to than NI airports (22%), that airport parking is affordable for them (23%), and that flights from NI offer consumers good value for money (32%).

Figure 10: Please say how much you agree or disagree with each of the following statements relating to airline services. (n=1121)



Statistically significant differences

Statement: *There is good choice / availability of flights from NI to GB*

- Airline users were more likely to disagree (22% vs. 14%)
- Men were more likely to disagree (18% vs. 13%)
- Younger consumers were more likely to agree (16-34, 72%: 35-59, 57%: 60+, 58%)
- Economically active consumers were more likely to agree (64% vs. 56%)
- Consumers with a disability were less likely to agree (58% vs. 64%)
- Better educated were more likely to disagree (high, 20%: medium, 12%: low, 13%)
- Higher income consumers were more likely to disagree (<=£20K, 15%:20K-£40K, 14%: £40K+, 21%)
- Mid and East Antrim residents were more likely to agree (72%) [Lisburn & Castlereagh more likely to disagree, 24%]

Statement: *There is good choice / availability of flights from NI to places outside of GB*

- Airline users were more likely to disagree (36% vs. 19%)
- Younger consumers were more likely to agree (16-34, 55%: 35-59, 47%: 60+, 44%)
- Economically active consumers were more likely to agree (52% vs. 42%)
- Consumers with a disability less likely to disagree (18% vs. 27%)
- Those with a high level of educational attainment were more likely to disagree (high, 31%: medium, 20%: low, 16%)
- Better educated were more likely to disagree (high, 20%: medium, 12%: low, 13%)
- Higher income consumers were more likely to disagree (<=£20K, 19%: 20K-£40K, 24%: £40K+, 34%)
- Consumers living in rural areas were more likely to agree (55% vs. 45%)
- Mid Ulster residents were more likely to agree (70%) [Lisburn & Castlereagh more likely to disagree, 30%]

Statement: *Flights from NI offer consumers good value for money*

- Airline users were more likely to agree (43% vs. 28%)
- Men were more likely to agree (35% vs. 29%)
- Younger consumers were more likely to agree (16-34, 43%: 35-59, 29%: 60+, 26%)
- ABC1 consumers were more likely to agree (35%) [C2DE, 29%]
- Economically active consumers were more likely to agree (35% vs. 26%)
- Better educated consumers were more likely to disagree (high, 36%: medium, 27%: low, 26%)
- Higher income consumers were more likely to agree (<=£20K, 32%: 20K-£40K, 32%: £40K+, 39%)
- Newry, Mourne and Down residents were more likely to agree (45%) [Armagh City, Banbridge and Craigavon more likely to disagree, 48%]

Statement: *There are good public transport services to NI airports*

- Airline users were more likely to disagree (43% vs. 25%)
- Younger consumers were more likely to agree (16-34, 47%: 35-59, 35%: 60+, 40%)
- ABC1 consumers were more likely to disagree (35%) [C2DE, 24%]
- Economically active consumers were more likely to disagree (33% vs. 21%)
- Better educated consumers were more likely to disagree (high, 36%: medium, 26%: low, 22%)
- Higher income consumers were more likely to disagree (<=£20K, 26%: 20K-£40K, 31%: £40K+, 39%)
- Consumers living in urban areas were more likely to agree (43% vs. 33%) [rural more likely disagree, 36% vs. 26%]
- Newry, Mourne and Down residents were more likely to agree (50%) [Mid and East Antrim more likely to disagree, 42%]

Statement: *Airport parking is affordable for me*

- Airline users were more likely to agree (28% vs. 22%)
- Men were more likely to agree (30% vs. 18%)
- Older consumers were less likely to agree (16-34, 27%: 35-59, 25%: 60+, 18%)
- ABC1 consumers were more likely to disagree (49%) [C2DE, 38%]
- Economically active consumers were more likely to disagree (45% vs. 39%)
- Consumers with a disability less likely to agree (17% vs. 27%)
- Better educated consumers were more likely to disagree (high, 47%: medium, 41%: low, 40%)
- Lower income consumers less likely to agree (<=£20K, 15%: 20K-£40K, 31%: £40K+, 29%)
- Consumers living in rural areas were more likely to agree (27% vs. 22%)
- Newry, Mourne and Down residents were more likely to agree (46%) [Mid and East Antrim more likely to disagree, 65%]

Statement: *Dublin airport offers greater choice of flights than NI's airports*

- Airline users were more likely to agree (79% vs. 61%)
- Women were more likely to agree (69% vs. 62%)
- Older consumers were more likely to agree (16-34, 63%: 35-59, 65%: 60+, 70%)
- ABC1 consumers were more likely to agree (76%) [C2DE, 56%]
- Economically active consumers were more likely to agree (69% vs. 60%)
- Better educated consumers were more likely to disagree (high, 79%: medium, 60%: low, 53%)
- Lower income consumers less likely to agree (<=£20K, 58%: 20K-£40K, 74%: £40K+, 74%)
- Mid Ulster residents were more likely to agree (78%) [Derry and Strabane more likely to disagree, 9%]

Statement: *Dublin airport is easier to get to than NI airports*

- Airline users were more likely to agree (58% vs. 47%)
- Women were more likely to agree (69% vs. 62%)
- Older consumers were more likely to disagree (16-34, 45%: 35-59, 44%: 60+, 64%)
- ABC1 consumers were more likely to agree (26%) [C2DE, 18%]
- Economically active consumers were more likely to agree (24% vs. 17%)
- Better educated consumers were more likely to disagree (high, 55%: medium, 47%: low, 46%)
- Lower income consumers less likely to agree (<=£20K, 11%: 20K-£40K, 25%: £40K+, 35%)
- Newry, Mourne and Down residents were more likely to agree (36%) [Ards and North Down more likely to disagree, 64%]

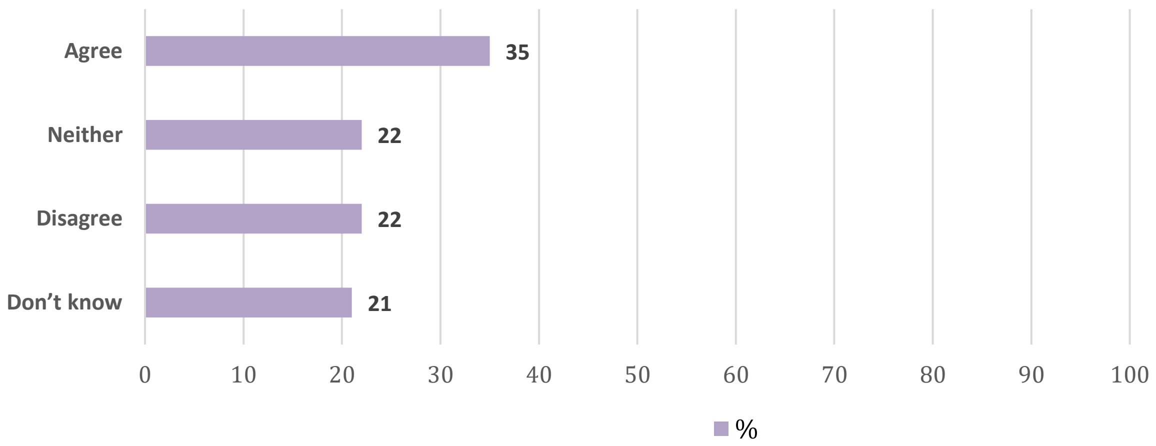
Statement: *Dublin airport offers better value for money on flights than NI airports*

- Men were more likely to disagree (11% vs. 6%)
- ABC1 consumers were more likely to agree (48%) [C2DE, 35%]
- Economically active consumers were more likely to agree (45% vs. 35%)
- Consumers with a disability less likely to agree (37% vs. 45%)
- Better educated consumers were more likely to disagree (high, 52%: medium, 35%: low, 32%)
- Lower income consumers less likely to agree (<=£20K, 32%: 20K-£40K, 46%: £40K+, 55%)
- Newry, Mourne and Down residents were more likely to agree (50%) [Mid Ulster more likely to disagree, 10%]

3.7 Ferry services

In relation to ferry services, Figure 11 shows that approximately one in three (35%) consumers believe that ferry services from NI offer consumers good value for money.

Figure 11: Please say how much you agree or disagree that ferry services from Northern Ireland offer consumers value for money. (n=1121)



Statistically significant differences

Statement: *Ferry services from NI offer consumers value for money*

- Ferry users were more likely to agree (43% vs. 34%)
- Men were more likely to agree (37% vs. 33%)
- Younger consumers were more likely to agree (16-34, 46%: 35-59, 32%: 60+, 28%)
- Economically active consumers were more likely to agree (39% vs. 27%)
- Consumers with a disability were more likely to agree (41% vs. 32%)
- Better educated were more likely to disagree (high, 27%: medium, 21%: low, 17%)
- Higher income consumers were more likely to agree (<=£20K, 34%:20K-£40K, 36%: £40K+, 40%)
- Mid Ulster residents were more likely to agree (49%) [Antrim and Newtownabbey more likely to disagree, 33%]

3.8 Walking and cycling

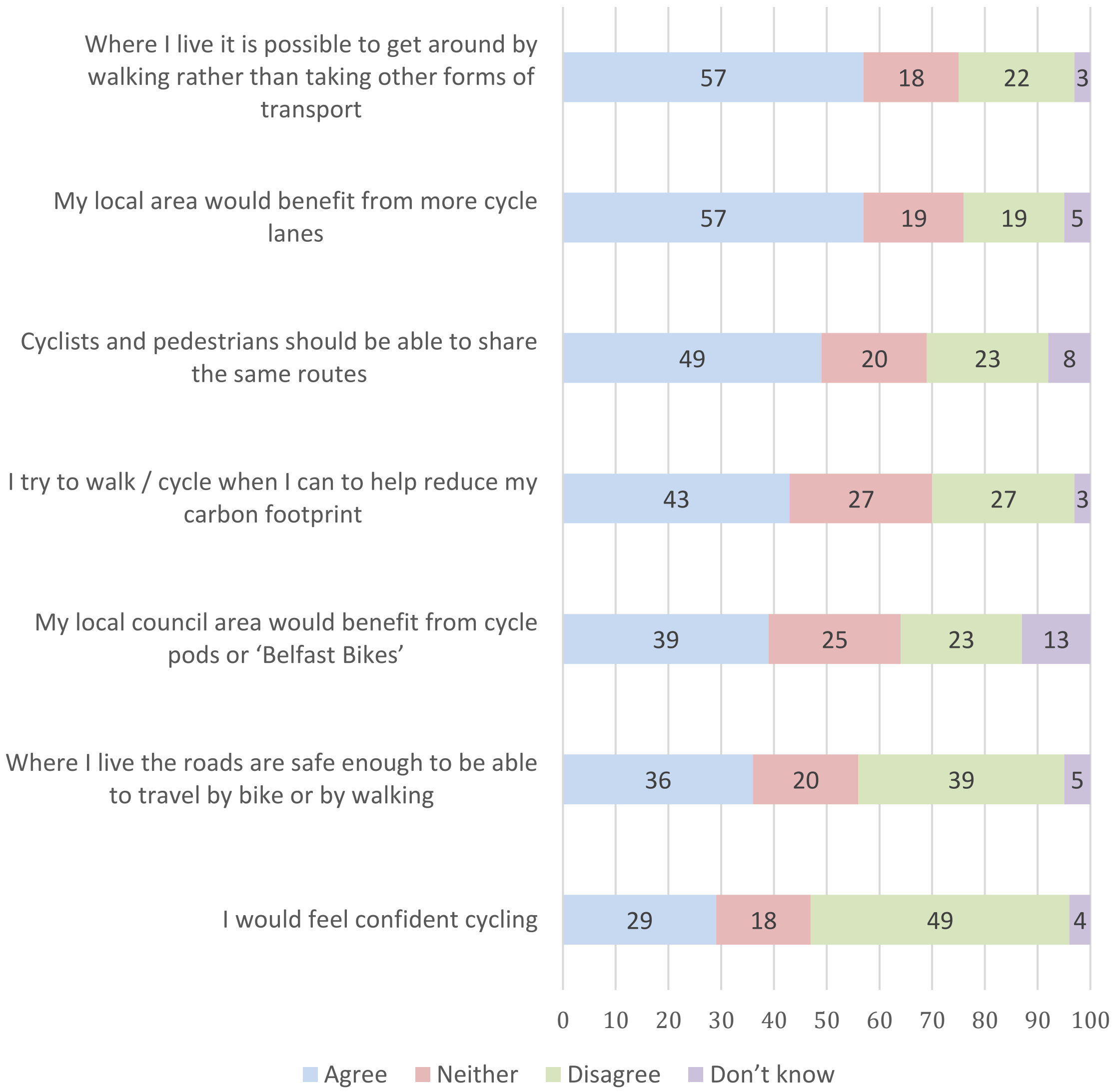
Consumers were asked to say if they agreed or disagreed with a series of statements about issues relating to walking and cycling.

Figure 12 shows that a majority of consumers said that where they live it is possible to get around by walking rather than taking other forms of transport (57%), with the same number saying their local area would benefit from cycle pods or 'Belfast Bikes' (57%).

Just under half (49%) agreed that cyclists and pedestrians should be able to share the same routes, with 43% saying they try to walk / cycle when they can to help reduce my carbon footprint.

Relatively fewer consumers said that where they live the roads are safe enough to be able to travel by bike or by walking (36%), with less than a third of consumers saying they would feel confident cycling (29%).

Figure 12: Please say how much you agree or disagree with each of the following statements relating to walking and cycling. (n=1121)



Statistically significant differences

Statement: *Where I live the roads are safe enough to be able to travel by bike or by walking*

- Men were more likely to agree (41% vs. 31%) [women were more likely to disagree, 46% vs. 32%]
- Younger consumers were more likely to agree (16-34, 43%: 35-59, 34%: 60+, 58%)
- ABC1 consumers were more likely to disagree (44%) [C2DE, 34%]
- Economically active consumers were more likely to agree (38% vs. 33%)
- Better educated were more likely to disagree (high, 48%: medium, 27%: low, 36%)
- Higher income consumers were more likely to agree (<=£20K, 34%: 20K-£40K, 35%: £40K+, 46%)
- Consumers in urban areas were more likely to agree (39% vs. 30%) [rural more likely to disagree, 48% vs. 34%]
- Antrim and Newtownabbey residents were more likely to agree (49%) [Mid Ulster more likely to disagree, 49%]

Statement: *My local area would benefit from more cycle lanes*

- Those who walk or cycle were more likely to agree (62% vs. 50%)
- Women were more likely to agree (60% vs. 53%)
- Younger consumers were more likely to agree (16-34, 62%: 35-59, 55%: 60+, 55%)
- Economically active consumers were more likely to agree (59% vs. 53%)
- Better educated were more likely to agree (high, 61%: medium, 54%: low, 53%)
- Higher income consumers were more likely to agree (<=£20K, 55%: 20K-£40K, 55%: £40K+, 61%)
- Derry and Strabane and Fermanagh and Omagh residents were more likely to agree (72%) [Lisburn and Castlereagh more likely to disagree, 34%]

Statement: *Where I live it is possible to get around by walking rather than taking other forms of transport*

- Those who walk or cycle were more likely to agree (64% vs. 49%)
- ABC1 consumers were more likely to disagree (25%) [C2DE, 19%]
- Economically active consumers were more likely to disagree (24% vs. 17%)
- Consumers with a disability less likely to agree (53% vs. 60%)
- Better educated were more likely to disagree (high, 26%: medium, 19%: low, 18%)
- Consumers in urban areas were more likely to agree (66% vs. 40%) [rural more likely to disagree, 42% vs. 11%]
- Belfast residents were more likely to agree (69%) [Mid Ulster more likely to disagree, 46%]

Statement: *My local council area would benefit from cycle pods or 'Belfast Bikes'*

- Younger consumers were more likely to agree (16-34, 47%: 35-59, 39%: 60+, 31%)
- ABC1 consumers were more likely to agree (41%) [C2DE, 37%]
- Economically active consumers were more likely to disagree (42% vs. 34%)
- Consumers with a disability were more likely to disagree (28% vs. 16%)
- Better educated were more likely to disagree (high, 29%: medium, 19%: low, 20%)
- Higher income consumers were more likely to agree (<=£20K, 38%: 20K-£40K, 39%: £40K+, 48%)
- Consumers in urban areas were more likely to agree (42% vs. 34%) [rural more likely to disagree, 32% vs. 18%]
- Newry, Mourne & Down residents were more likely to agree (48%) [Fermanagh & Omagh more likely to disagree, 41%]

Statement: *I try to walk / cycle when I can to help reduce my carbon footprint*

- Those who walk or cycle were more likely to agree (52% vs. 30%)
- Younger consumers were more likely to agree (16-34, 51%: 35-59, 43%: 60+, 32%)
- ABC1 consumers were more likely to agree (45%) [C2DE, 41%]
- Economically active consumers were more likely to agree (48% vs. 32%)
- Consumers with a disability were more likely to disagree (31% vs. 25%)
- Higher income consumers were more likely to agree (<=£20K, 44%: 20K-£40K, 41%: £40K+, 49%)
- Consumers in urban areas were more likely to agree (47% vs. 34%) [rural more likely to disagree, 30% vs. 25%]
- Antrim & Newtownabbey residents were more likely to agree (56%) [Lisburn & Castlereagh more likely to disagree, 37%]

Statement: *Cyclists and pedestrians should be able to share the same routes*

- Those who walk or cycle were more likely to agree (53% vs. 45%)
- Men were more likely to agree (53% vs. 46%)
- Younger consumers were more likely to agree (16-34, 55%: 35-59, 50%: 60+, 42%)
- ABC1 consumers were more likely to disagree (26%) [C2DE, 21%]
- Economically active consumers were more likely to agree (53% vs. 43%)
- Consumers with a disability were less likely to agree (45% vs. 52%)
- Better educated were more likely to disagree (high, 29%: medium, 19%: low, 18%)
- Higher income consumers were more likely to agree (<=£20K, 48%: 20K-£40K, 49%: £40K+, 57%)
- Consumers living in rural areas were more likely to agree (55% vs. 46%)
- Mid Ulster residents were more likely to agree (63%) [Lisburn & Castlereagh more likely to disagree, 29%]

Statement: *I would feel confident cycling*

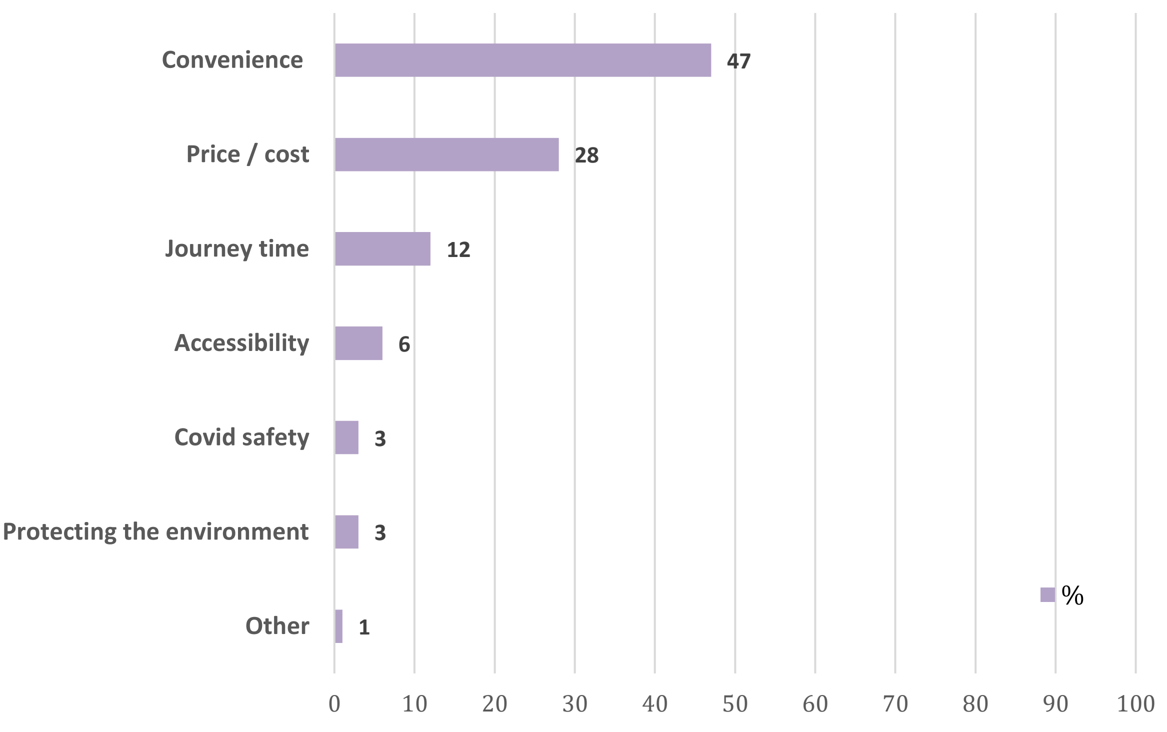
- Those who walk or cycle were more likely to agree (31% vs. 25%)
- Men were more likely to agree (40% vs. 18%)
- Younger consumers were more likely to agree (16-34, 38%: 35-59, 31%: 60+, 15%)
- ABC1 consumers were more likely to agree (31%) [C2DE, 27%]
- Economically active consumers were more likely to agree (35% vs. 16%)
- Consumers with a disability were less likely to agree (20% vs. 34%)
- Higher income consumers were more likely to agree (<=£20K, 23%: 20K-£40K, 30%: £40K+, 41%)
- Antrim & Newtownabbey and Newry, Mourne and Down residents were more likely to agree (42%) [Mid & East Antrim more likely to disagree, 63%]

3.9 Decisions on using different forms of transport

Consumers were asked what matters most to them when deciding on which form of transport to take.

Figure 13 shows that just under half (47%) of consumers said that convenience matters most to them when deciding on which form of transport to take, with 28% citing cost and 12% citing journey time. Six percent said that accessibility matters most to them, with 3% citing covid safety, 3% protecting the environment and 1% other things[2].

Figure 13: What matters most to you when deciding on which form of transport to take? (base=1121)



Statistically significant differences

- Men were more likely to say that journey time matters most (14% vs. 10%), whereas women were more likely to say convenience matters most (49% vs. 45%)
- Consumers aged under 60 were more likely to say that price / cost matters most (16-34, 33%: 35-59, 32%: 60+, 17%), whereas older consumers were more likely to cite convenience (16-34, 40%: 35-59, 44%: 60+, 61%)
- C2DE consumers were more likely to say that price / cost matters most (32% vs. ABC1, 24%)
- Consumers with a disability were proportionately more likely to say that accessibility matters most to them (12% vs. 3%)

[2] Included: ability to reach the destination (n=1); disability needs (n=1); distance I wish to travel (n=1); health (n=1); safety (n=1); travel sickness - I drive (n=1); weather (n=1); what is the easiest for me because I cannot walk far (n=1).

3.10 Climate change and transport

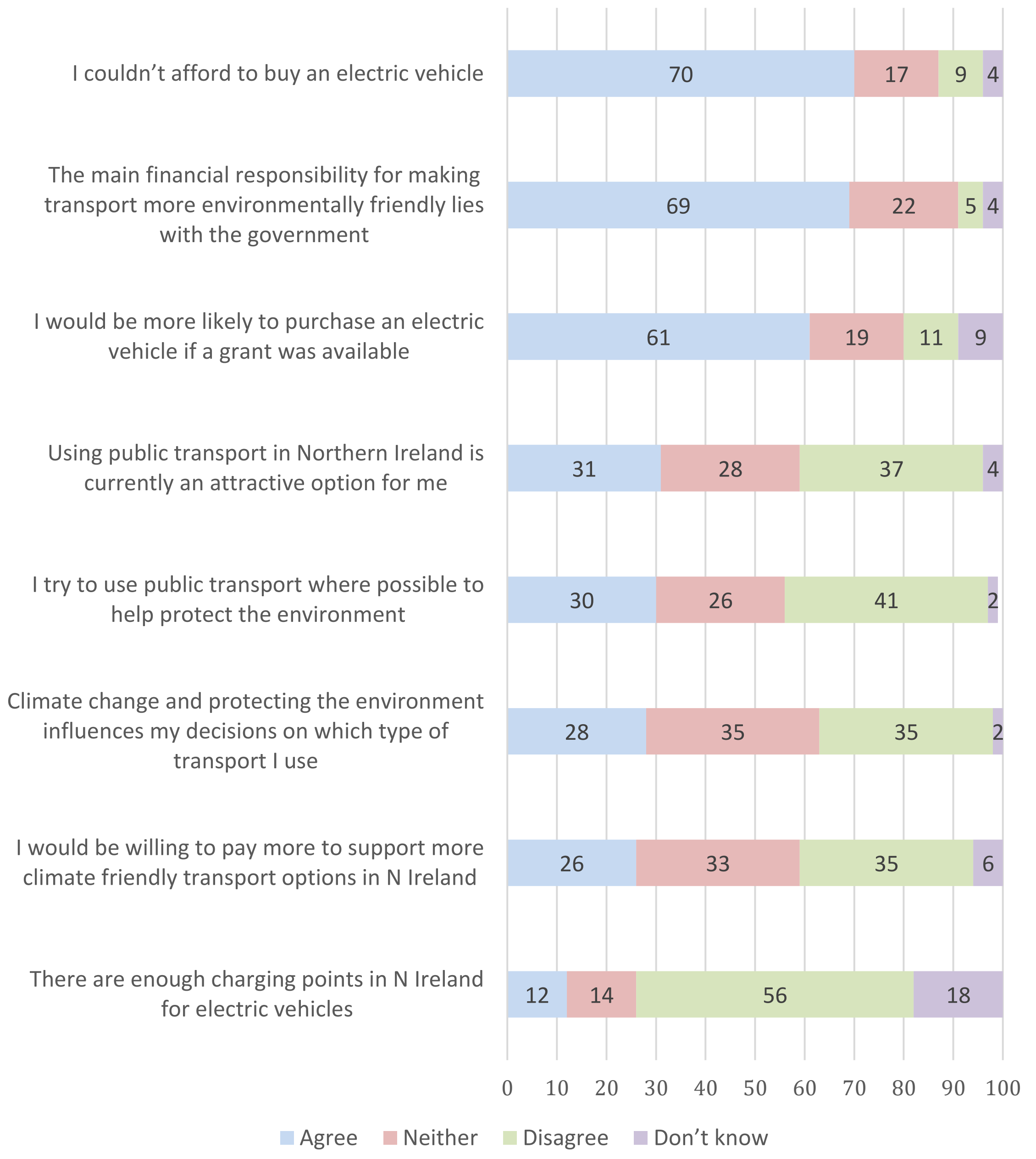
Respondents were presented with a number of statements in relation to climate change and transport.

Figure 14 shows that although most consumers said they can't afford to buy an electric vehicle (70%), most said they would be more likely to purchase one if a grant was available (61%). Just 12% of consumers believe there are enough charging points in NI for electric vehicles.

Relatively few respondents said that using public transport in NI is currently an attractive option for them (31%), with similar numbers saying they use public transport where possible to help protect the environment (30%), and that climate change and protecting the environment influences their decisions on which type of transport they use (28%). Indeed just over a quarter of consumers say they would be willing to pay more to support more climate friendly transport options in NI (26%).

Almost seven out of ten (69%) consumers believe that the main financial responsibility for making transport more environmentally friendly lies with government.

Figure 14: Please say how much you agree or disagree with each of the following statements relating to climate change and transport. (n=1121)



Statistically Significant Differences between Respondent Groups

Statement: *Climate change and protecting the environment influences my decisions on which type of transport I use*

- Men were more likely to agree (32% vs. 24%)
- Younger consumers were more likely to agree (16-34, 35%: 35-59, 29%: 60+, 17%)
- Economically active consumers were more likely to agree (32% vs. 20%)
- Higher income consumers were more likely to agree (<=£20K, 27%: 20K-£40K, 26%: £40K+, 39%)
- Consumers living in urban areas were more likely to agree (31% vs. 22%)
- Belfast residents were more likely to agree (36%) [Mid Ulster more likely to disagree, 49%]

Statement: *I try to use public transport where possible to help protect the environment*

- Car users were less likely to agree (26% vs. 48%) and more likely to disagree (46% vs. 19%)
- Younger consumers were more likely to agree (16-34, 34%: 35-59, 30%: 60+, 27%)
- ABC1 consumers were more likely to disagree (44%) [C2DE, 38%]
- Economically active consumers were more likely to agree (32% vs. 27%)
- Better educated were more likely to disagree (high, 45%: medium, 40%: low, 37%)
- Consumers living in urban areas were more likely to agree (32% vs. 27%)
- Antrim and Newtownabbey residents were more likely to agree (39%) [Fermanagh & Omagh more likely to disagree, 52%]

Statement: *I couldn't afford to buy an electric vehicle*

- Women were more likely to agree (78% vs. 61%)
- Consumers aged 35+ were more likely to agree (16-34, 65%: 35-59, 72%: 60+, 73%)
- ABC1 consumers were more likely to disagree (11%) [C2DE, 7%]
- Economically inactive consumers were more likely to agree (75% vs. 68%)
- Non-disabled consumers were more likely to agree (73% vs. 66%)
- Lower income consumers were more likely to agree (<=£20K, 81%: 20K-£40K, 66%: £40K+, 57%)
- Antrim and Newtownabbey residents were more likely to agree (79%) [Fermanagh & Omagh more likely to disagree, 16%]

Statement: *There are enough charging points in NI for electric vehicles*

- Car users were more likely to disagree (61% vs. 35%)
- Men were more likely to agree (15% vs. 10%)
- Older consumers were more likely to disagree (16-34, 49%: 35-59, 57%: 60+, 63%)
- ABC1 consumers were more likely to disagree (60%) [C2DE, 53%]
- Economically inactive consumers were more likely to agree (16% vs. 5%)
- Consumers with a disability were more likely to answer don't know (22% vs. 15%)
- Better educated were more likely to disagree (high, 66%: medium, 45%: low, 53%)
- Higher income consumers were more likely to agree (<=£20K, 8%: 20K-£40K, 12%: £40K+, 22%)
- Mid and East Antrim residents were more likely to agree (21%) [Mid Ulster and Lisburn and Castlereagh more likely to disagree, 65%]

Statement: *The main financial responsibility for making transport more environmentally friendly lies with the government*

- Car users were more likely to agree (71% vs. 60%)
- Economically inactive consumers were more likely to agree (70% vs. 67%)
- Better educated were more likely to agree (high, 73%: medium, 65%: low, 65%)
- Higher income consumers were more likely to agree (<=£20K, 8%: 20K-£40K, 12%: £40K+, 22%)
- Consumers in urban areas were more likely to agree (70% vs. 66%)
- Derry and Strabane residents were more likely to agree (85%) [Mid and East Antrim more likely to disagree, 25%]

Statement: *I would be willing to pay more to support more climate friendly transport options in NI*

- Car users were more likely to disagree (37% vs. 28%)
- Men were more likely to agree (31% vs. 21%)
- Younger consumers were more likely to agree (16-34, 30%: 35-59, 26%: 60+, 20%)
- Economically active consumers were more likely to agree (30% vs. 18%)
- Consumers with a disability less likely to agree (23% vs. 27%)
- Better educated were more likely to disagree (high, 41%: medium, 30%: low, 33%)
- Higher income consumers were more likely to agree (<=£20K, 24%: 20K-£40K, 24%: £40K+, 22%)
- Antrim and Newtownabbey residents were more likely to agree (33%) [Lisburn and Castlereagh more likely to disagree, 50%]

Statement: *I would be more likely to purchase an electric vehicle if a grant was available*

- Car users were more likely to agree (66% vs. 38%)
- Consumers aged under 60 were more likely to agree (16-34, 67%: 35-59, 64%: 60+, 49%)
- ABC1 consumers were more likely to agree (68%) [C2DE, 54%]
- Consumers with a disability less likely to agree (54% vs. 66%)
- Economically active consumers were more likely to agree (66% vs. 50%)
- Higher income consumers were more likely to agree (<=£20K, 53%: 20K-£40K, 67%: £40K+, 70%)
- Consumers in rural areas were more likely to agree (68% vs. 57%)
- Mid Ulster residents were more likely to agree (71%) [Lisburn and Castlereagh more likely to disagree, 16%]

Statement: *Using public transport in NI is currently an attractive option for me*

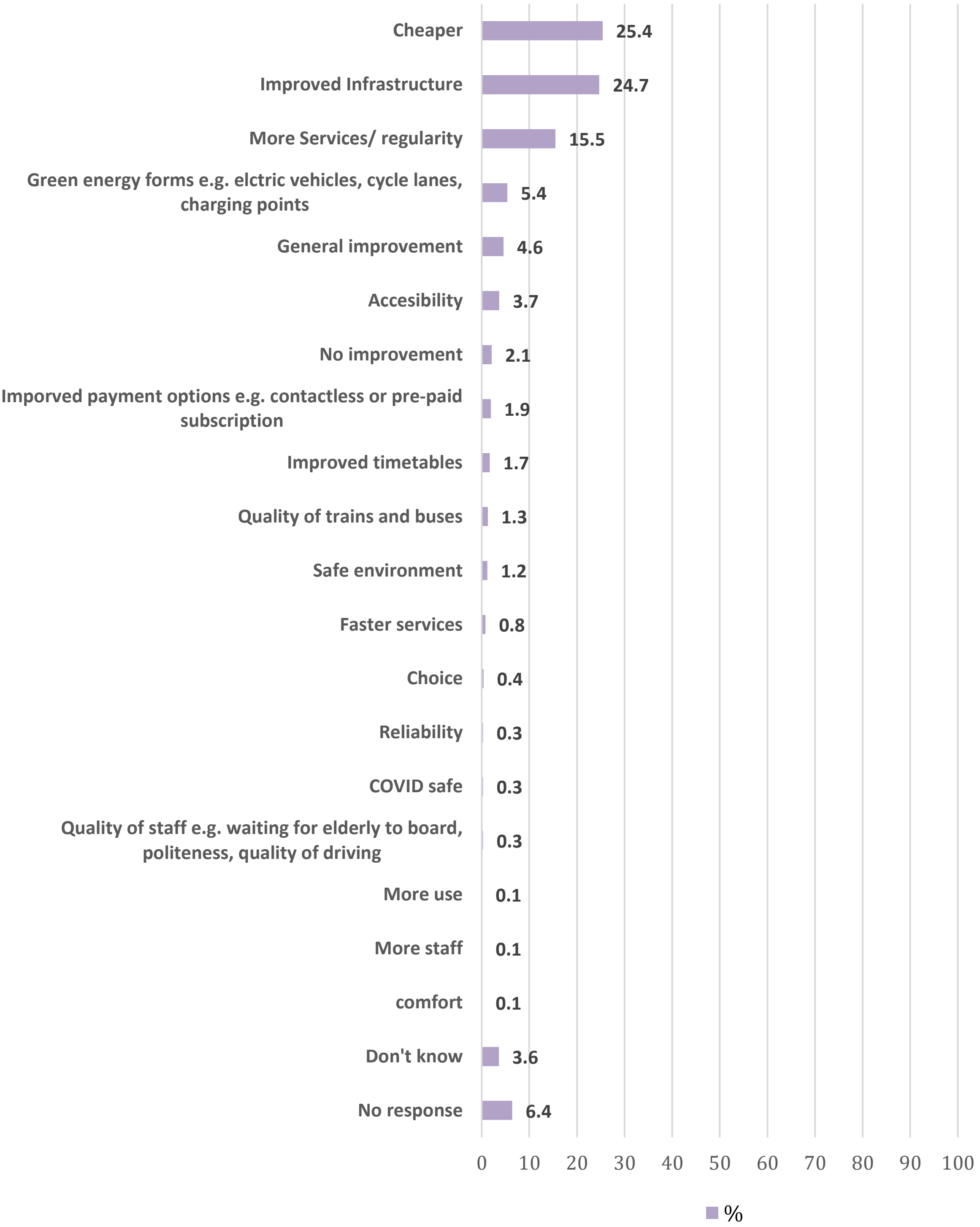
- Car users were less likely to agree (61% vs. 25%) and more likely to disagree (43% vs. 13%)
- Older consumers were more likely to agree (16-34, 33%: 35-59, 25%: 60+, 40%)
- C2DE consumers were more likely to agree (34%) [ABC1, 28%]
- Better educated were more likely to disagree (high, 45%: medium, 31%: low, 34%)
- Relatively higher income consumers were more likely to disagree (<=£20K, 31%: 20K-£40K, 42%: £40K+, 43%)
- Consumers in urban areas were more likely to agree (35% vs. 25%)
- Belfast residents were more likely to agree (43%) [Mid Ulster more likely to disagree, 54%]

3.11 The future of transport

3.11.1 Future of public transport

Consumers were asked to think about **public transport (buses and trains)** in NI, and to say what single thing they would like to see change to better meet their needs as a consumer. Figure 15 shows that consumers most commonly called for cheaper prices (25%) and improved infrastructure (25%).

Figure 15: Looking to the future, and thinking about public transport (buses and trains) in Northern Ireland, what single thing would you like to see change to better meet your needs as a consumer? (base=1124)



3.11.2 Future of transport by car

Consumers were asked to think about **transport by car** in NI, and to say what single thing they would like to see change to better meet their needs as a consumer. Figure 16 shows that consumers most commonly called for cheaper prices (42%) and improved infrastructure 13%).

Figure 16: Looking to the future, and thinking about transport by car in Northern Ireland, what single thing would you like to see change to better meet your needs as a consumer? (base=1124)

3.11.3 Future of transport by planes and ferries

Consumers were asked to think about **planes and ferries** in NI, and to say what single thing they would like to see change to better meet their needs as a consumer.

Figure 17 shows that consumers most commonly called for cheaper prices (37%) and greater choice (24%).

Figure 17: Looking to the future, and thinking about planes and ferries, what single thing would you like to see change to better meet your needs as a consumer? (base=1124)

3.11.4 Future of active travel such as walking and cycling

Consumers were asked to think about **active travel such as walking and cycling** in NI, and to say what single thing would you like to see change to better meet their needs as a consumer.

Figure 18 shows that consumers most commonly called for improved infrastructure (47%) and for it to be safer to engage in active travel (12%).

Figure 18: Looking to the future, and thinking about active travel such as walking and cycling, what single thing would you like to see change to better meet your needs as a consumer? (base=1124)

3.12 Support for change in relation to climate change and transport

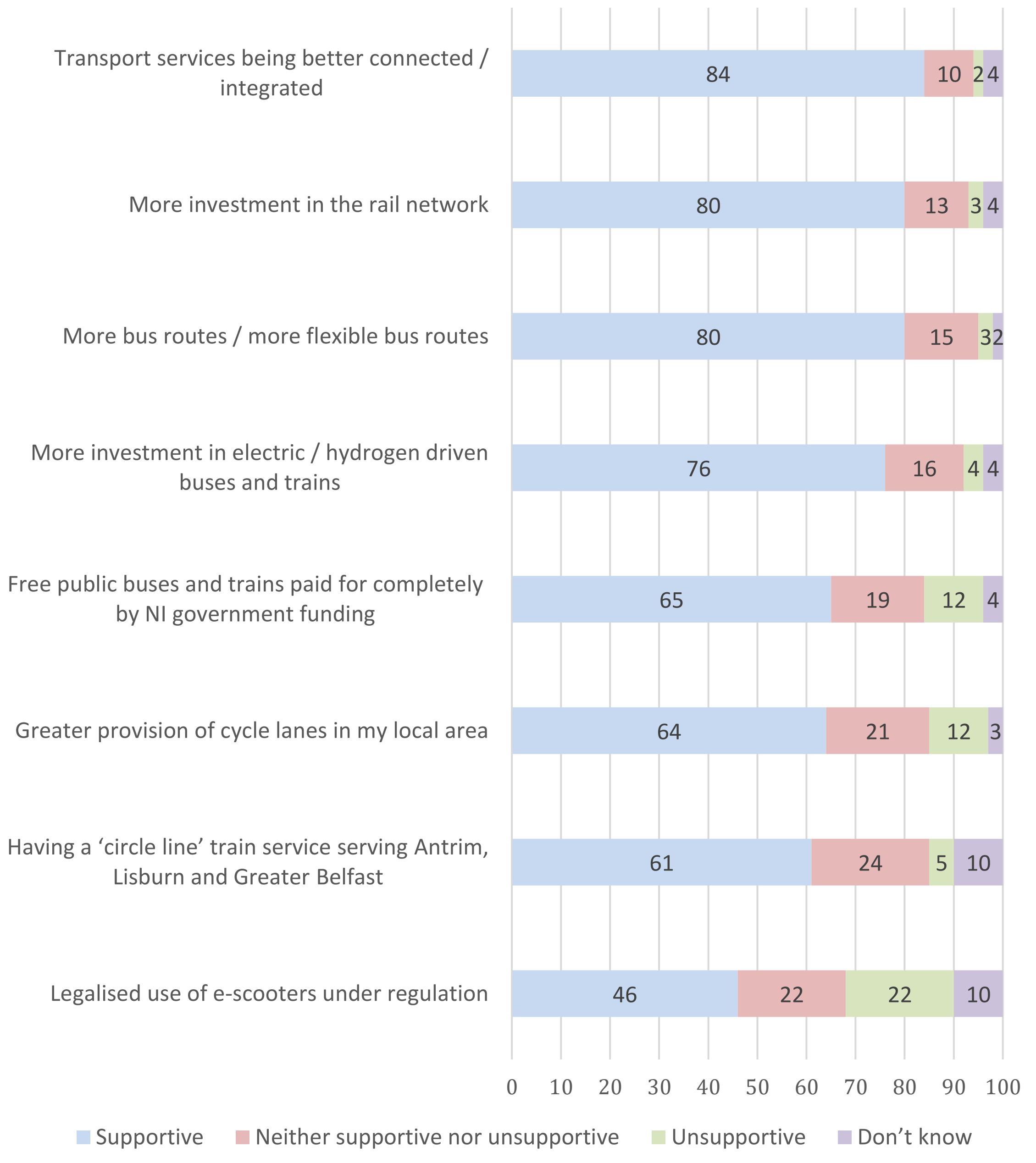
Consumers were presented with a range of possible changes to help reduce the impact of transport on climate change.

Figure 19 shows that the highest levels of support were for transport services being better connected (84%), more investment in the rail network (80%), more bus routes / flexible bus routes (80%), and more investment in electric / hydrogen driven buses and trains (76%).

More than six out of ten consumers were supportive of free public buses and trains paid for completely by NI government funding (65%), with similar numbers supportive of greater provision of cycle lanes in their local area (64%) and having a 'circle line' train service serving Antrim, Lisburn and Belfast (61%).

In contrast, less than half of consumers (46%) were supportive of legalised use of e-scooters under regulation.

Figure 19: Please say if you agree or disagree with each of the following statements in relation to climate change and transport. (n=1121)



Statement: *More investment in electric / hydrogen driven buses and trains*

- Males were more likely to be supportive (79% vs. 73%)
- ABC1 consumers were more likely to be supportive (78%) [C2DE, 73%]
- Economically active consumers were more likely to be supportive (77% vs. 73%)
- Consumers with a disability less likely to be supportive (73% vs. 78%)
- Economically active consumers were more likely to be supportive (66% vs. 50%)
- Relatively better educated were more likely to be supportive (high, 80%: medium, 79%: low, 69%)
- Consumers in urban areas were more likely to be supportive (77% vs. 73%)
- Antrim and Newtownabbey residents were more likely to be supportive (83%)

Statement: *Greater provision of cycle lanes in my local area*

- Women were more likely to be supportive (67% vs. 61%)
- Younger consumers were more likely to be supportive (16-34, 68%: 35-59, 64%: 60+, 62%)
- Economically active consumers were more likely to be supportive (67% vs. 60%)
- Consumers with a disability less likely to be supportive (59% vs. 68%)
- Relatively better educated were more likely to be supportive (high, 68%: medium, 67%: low, 57%)
- Consumers in urban areas were more likely to be unsupportive (14% vs. 8%)
- Derry and Strabane residents were more likely to be supportive (83%)

Statement: *More bus routes / more flexible bus routes*

- Women were more likely to be supportive (86% vs. 74%)
- ABC1 consumers were more likely to be supportive (82%) [C2DE, 78%]
- Higher income consumers were more likely to be supportive (<=£20K, 83%: 20K-£40K, 79%: £40K+, 78%)
- Fermanagh and Omagh residents were more likely to be supportive (84%)

Statement: *Transport services being better connected / integrated*

- Women were more likely to be supportive (88% vs. 81%)
- ABC1 consumers were more likely to be supportive (89%) [C2DE, 80%]
- Economically active consumers were more likely to be supportive (86% vs. 81%)
- Consumers with a disability less likely to be supportive (80% vs. 87%)
- Better educated were more likely to be supportive (high, 90%: medium, 85%: low, 76%)
- Ards and North Down residents were more likely to be supportive (92%)

Statement: *More investment in the rail network*

- Women were more likely to be supportive (83% vs. 76%)
- Older consumers were more likely to be supportive (16-34, 75%: 35-59, 79%: 60+, 86%)
- ABC1 consumers were more likely to be supportive (84%) [C2DE, 76%]
- Better educated were more likely to be supportive (high, 86%: medium, 78%: low, 72%)
- Fermanagh and Omagh residents were more likely to be supportive (89%)

Statement: *Legalised use of e-scooters under regulation*

- Men were more likely to be supportive (48% vs. 44%)
- Younger consumers were more likely to be supportive (16-34, 54%: 35-59, 47%: 60+, 37%)
- C2DE consumers were more likely to be supportive (50%) [ABC1, 42%]
- Better educated were more likely to be unsupportive (high, 26%: medium, 15%: low, 21%)
- Middle income consumers less likely to be supportive (<=£20K, 49%: 20K-£40K, 41%: £40K+, 51%)
- Consumers in urban areas were more likely to be unsupportive (14% vs. 8%)
- Newry, Mourne and Down residents were more likely to be supportive (62%) [Fermanagh and Omagh more likely to be unsupportive, 37%]

Statement: *Free public buses and trains paid for completely by NI government funding*

- Younger consumers were more likely to be supportive (16-34, 74%: 35-59, 65%: 60+, 54%)
- Derry and Strabane residents were more likely to be supportive (77%)

Statement: *Having a 'circle line' train service serving Antrim, Lisburn and Greater Belfast*

- Women were more likely to be supportive (64% vs. 59%)
- Younger consumers were more likely to be supportive (16-34, 65%: 35-59, 50%: 60+, 61%)
- ABC1 consumers were more likely to be supportive (63%) [C2DE, 59%]
- Economically active consumers were more likely to be supportive (63% vs. 58%)
- Consumers with a disability less likely to be supportive (57% vs. 65%)
- Consumers in rural areas were more likely to be supportive (66% vs. 53%)
- Antrim and Newtownabbey residents were more likely to be supportive (78%)

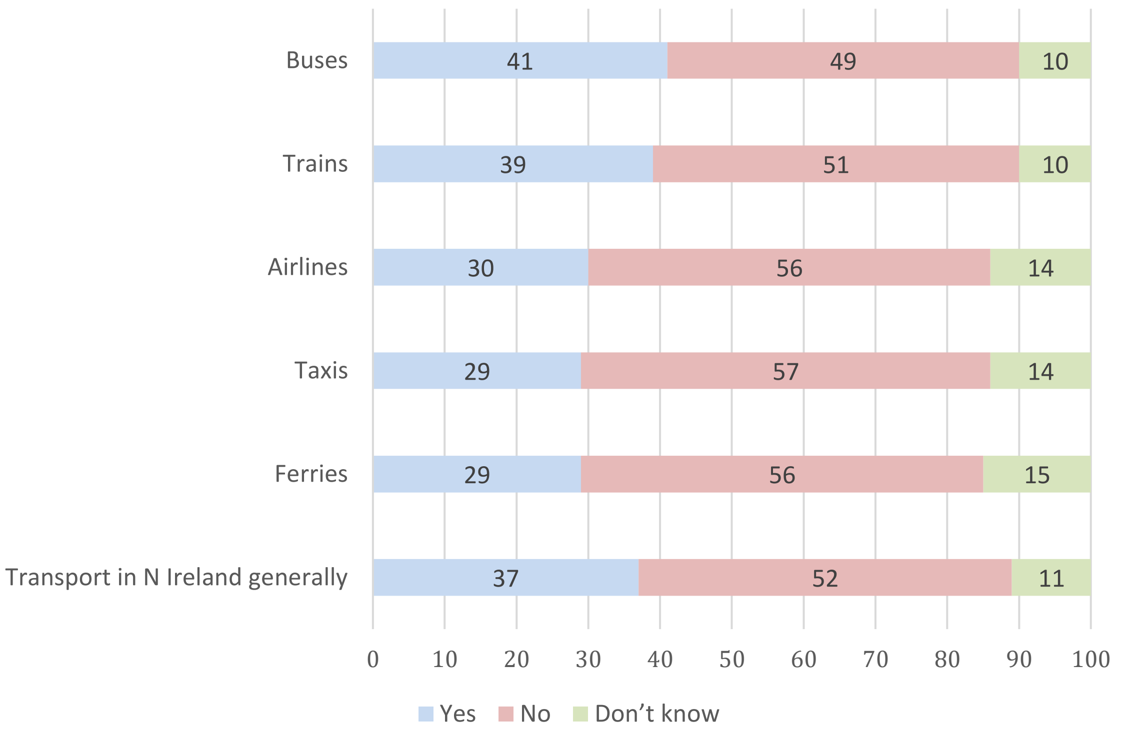
3.13 Awareness that The Consumer Council has a responsibility for representing the interests of consumers

The Consumer Council for NI has a statutory responsibility to represent the interests of consumers in NI. Given this, respondents were asked, if before taking part in the survey, they were aware that the Consumer Council has a responsibility for representing the interests of NI consumers in relation to different forms of transport.

Figure 20 shows that consumers were most likely to be aware that The Consumer Council has a responsibility for representing the interest of consumers in relation to buses (41%), and least likely to be aware that The Consumer Council has a responsibility for representing the interest of consumers in relation to ferries (29%) and taxis (29%).

Just over a third (37%) of consumers were aware that The Consumer Council has a responsibility for representing the interest of consumers in relation to transport generally.

Figure 20: Before taking part in this survey were you aware that the Consumer Council has a responsibility for representing the interests of NI consumers in relation to each of the following..? (n=1121)



Statistically Significant Differences between Respondent Groups

Those more likely to be aware that The Consumer Council has a responsibility for representing the interests of consumers in relation to transport generally included:

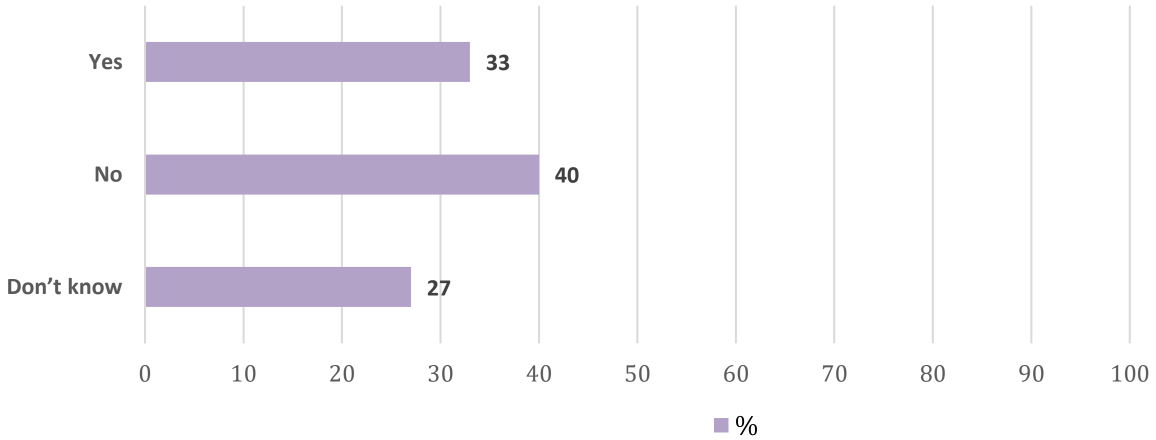
- Younger consumers (16-34, 45%: 35-59, 34%: 60+, 33%)
- Economically active consumers (39% vs. 34%)
- Higher income consumers (<=£20K, 34%: 20K-£40K, 37%: £40K+, 45%)
- Belfast residents (43%) [Lisburn and Castlereagh were more likely to say they were not aware, 67%]

3.14 Aspects of transport where consumers feel they need greater protection

Respondents were asked if there is a particular aspect of transport in NI where they feel they need greater protection as a consumer.

Figure 21 shows that one in three (33%) consumers believe there are particular aspects of transport in NI where they feel they need greater protection, with 40% saying there are not, and 27% undecided.

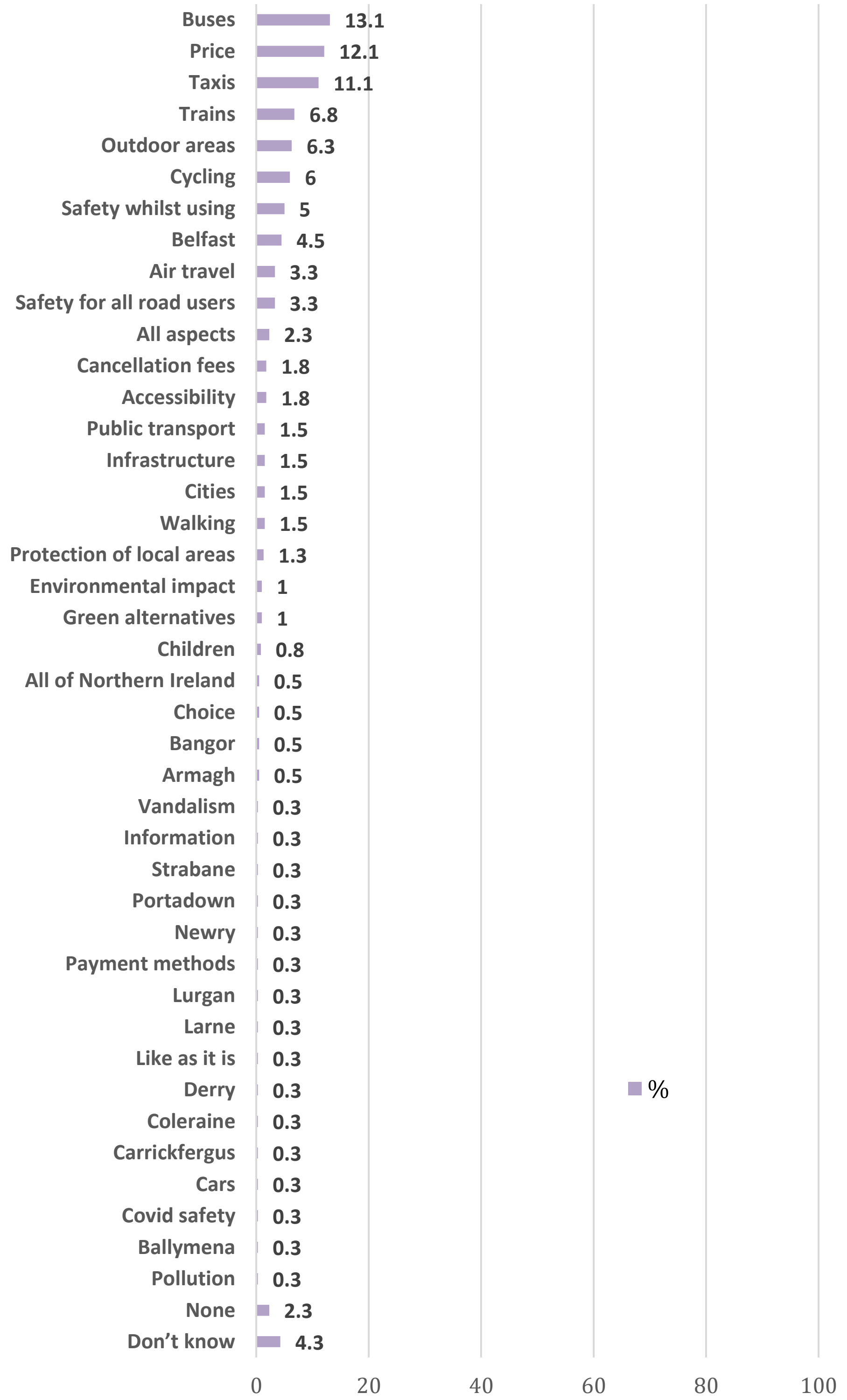
Figure 21: Is there a particular aspect of transport in Northern Ireland where you feel you need greater protection as a consumer? (base=1124)



3.14.1 Aspects of transport where consumers feel they need better protection

Figure 22 shows that among consumers (n=398) who said there are aspects of transport where consumers need better protection, 13% said better protection is needed in relation to buses, 12% cited price, and 11% cited taxis. Other areas were listed by relatively fewer consumers.

Figure 22: Particular aspect of transport in Northern Ireland where you feel you need greater protection as a consumer? (base=398)



Appendices

Appendix 1 (Focus group topic guide)

Issues

- What are the big issues for you overall?
  - Local?
  - Regional?
  - National?
  - International?

Decisions

- What matters most when you make decisions?

Decisions

- How do things like climate change / lower emissions / environmental concerns come into your decisions about travel?

Future

- Have things changed since COVID-19?
- Has COVID-19 changed things in a permanent way?

Future

- What changes do you think will happen in Public Transport in the future?

Future

- Looking to the future, what changes would you <u>like to</u> see in Public Transport?

Future

- What do changes do you think will happen in private transport, cars, cycling, active travel, motoring in general in the future?

Future

- Looking to the future, what changes would you <u>like to see</u> in private transport, cars, cycling, active travel, motoring in general?

Decisions

- What changes do you think will happen in longer range travel, ferries and flights in the future?

Future

- Looking to the future, what changes would you <u>like to see</u> in longer range travel, ferries and flights in the future?

13

CONSUMER PROTECTION

- What consumer protection do you need?

14

Appendix 2 (Questionnaire)

The Consumer Council

Questionnaire v5

FUTURE OF TRANSPORT CONSUMER SURVEY

10 March 2022

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BT9 6DJ

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Pre-amble

This survey is being conducted on behalf of the Consumer Council for NI and aims to better understand consumer opinion on different aspects of transport in NI.

Section A: Types of Transport Used and Reasons for Doing So

A1. How often do you use the following forms of transport? **Answer for each)**

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

1	Own Car
2	Company Car
3	Taxi
4	Bus
5	Train
6	Plane
7	Ferry
8	Walk
9	Cycle

A3. Of the different forms of transport you use [ONLY LIST THOSE SELECTED AT A1], which do you use most often?

Own Car	1
Company car	2
Taxi	3
Bus	4
Train	5
Plane	6
Ferry	7
Walk	8
Cycle	9

A4. Please say which of the following forms of transport you would be most likely to use if you were travelling in the following situations?

	Own Car	Company Car	Taxi	Bus	Train	Plane	Ferry	Walk	Cycle
Travelling in your local area	1	2	3	4	5	6	7	8	9
Travelling to other areas of NI	1	2	3	4	5	6	7	8	9
Travelling to GB	1	2	3	4	5	6	7	8	9
Travelling to Republic of Ireland	1	2	3	4	5	6	7	8	9
Travelling to places outside of UK and Ireland	1	2	3	4	5	6	7	8	9

Section B: Issues with Transport

Bus Services

B1. Bus services are a key part of the public transport service in Northern Ireland. Please say if you agree or disagree with each of the following statements in relation to buses.

Agree	1
Neither agree nor disagree	2
Disagree	3
Don't know	4

1	There is a good local bus service where I live
2	The bus service in my local area is frequent enough to meet my needs
5	I have a good understanding of bus services in my local area (times, frequencies etc.)
6	There is a good bus service at weekends
9	There is a good bus network / routes across Northern Ireland
10	Bus drivers are generally courteous, helpful and have a good attitude
12	Having to carry cash / have the exact amount for a bus ticket is inconvenient
13	There is overcrowding on buses

NEWSCREEN

And please say if you agree or disagree with each of the following statements in relation to buses.

14	The bus service in N Ireland meets the needs of people with a disability
15	The bus service in N Ireland meets the needs of young families with children / prams
16	I feel safe on buses in Northern Ireland
20	Bus services offer N Ireland consumers value for money
21	More competition in bus services would benefit consumers in Northern Ireland

Train Services

B2. Train services are a key part of the public transport service in Northern Ireland. Please say if you agree or disagree with each of the following statements in relation to trains.

Agree	1
Neither agree nor disagree	2
Disagree	3
Don't know	4

1	My local area is well served by train services
2	Train services offer N Ireland consumers value for money
3	I would use train services more often if I could
4	The rail network in Northern Ireland should be expanded to other areas of N Ireland
7	Trains should use more environmentally friendly fuels (e.g. electric or hydrogen engines)

NEWSCREEN

10	The train service in N Ireland meets the needs of people with a disability
11	The train service in N Ireland meets the needs of young families with children / prams
12	I feel safe on trains in Northern Ireland
15	More competition in train services would benefit consumers in Northern Ireland

Using Your Own Car

B3. Please say if you agree or disagree with each of the following statements in relation to private car use.

Agree	1
Neither agree nor disagree	2
Disagree	3
Don't know	4

1	Driving is more convenient than other forms of transport
2	I have mobility issues and driving is a better option than other forms of transport
3	I drive because there is poor public transport provision in my local area
4	Driving is cheaper than other forms of transport
5	I will be looking at other forms of transport because of rising petrol / diesel prices
6	I think about the environmental impact of driving my car
8	I will always use my car regardless of what other transport options are available
9	I would use my car less if public transport was free or heavily subsidized

Taxi Services

B4. Taxi services are a key part of the public transport service in Northern Ireland. Please say if you agree or disagree with each of the following statements in relation to taxis.

Agree	1
Neither agree nor disagree	2
Disagree	3
Don't know	4

1	My local area is well served by taxis / good availability
2	Taxi services in my local area offer good value for money
5	I am worried about my personal safety when using taxis

Airline Services

B5. Airline services are an important way of travelling for many NI consumers. Please say if you agree or disagree with each of the following statements in relation to planes.

Agree	1
Neither agree nor disagree	2
Disagree	3
Don't know	4

1	There is good choice / availability of flights from N Ireland to GB
2	There is good choice / availability of flights from N Ireland to places outside of GB
3	Flights from N Ireland offer consumers good value for money
4	There are good public transport services to N Ireland airports
5	Airport parking is affordable for me
11	Dublin airport offers greater choice of flights than Northern Ireland's airports
12	Dublin airport is easier to get to than NI airports
13	Dublin airport offers better value for money on flights than NI airports

Ferry Services

B6. Ferry services are a key part of the transport service in Northern Ireland. Please say if you agree or disagree with each of the following statements in relation to ferries.

Agree	1
Neither agree nor disagree	2
Disagree	3
Don't know	4

2	Ferry services from N Ireland offer consumers good value for money

Walking and Cycling

B7. Active travel means making journeys by walking or cycling instead of using other forms of transport. Please say if you agree or disagree with each of the following statements in relation to walking and cycling.

Agree	1
Neither agree nor disagree	2
Disagree	3
Don't know	4

1	Where I live the roads are safe enough to be able to travel by bike or by walking
3	My local area would benefit from more cycle lanes
4	Where I live it is possible to get around by walking rather than taking other forms of transport
6	My local council area would benefit from cycle pods or 'Belfast Bikes'
8	I try to walk / cycle when I can to help reduce my carbon footprint
9	Cyclists and pedestrians should be able to share the same routes
10	I would feel confident cycling

Section C: Decisions on Using Transport

C1. What matters most to you when deciding on which form of transport to take ?

Price / cost	1
Convenience	2
Journey time	3
Protecting the environment	4
Accessibility	5
Covid safety	6
Other (please specify)	7

Section D: Climate Change and Transport

D1. Please say if you agree or disagree with each of the following statements in relation to climate change and transport.

Agree	1
Neither agree nor disagree	2
Disagree	3
Don't know	4

1	Climate change and protecting the environment influences my decisions on which type of transport I use
2	I try to use public transport where possible to help protect the environment
4	I couldn't afford to buy an electric vehicle
5	There are enough charging points in N Ireland for electric vehicles
7	The main financial responsibility for making transport more environmentally friendly lies with the government
8	I would be willing to pay more to support more climate friendly transport options in N Ireland
9	I would be more likely to purchase an electric vehicle if a grant was available
10	Using public transport in Northern Ireland is currently an attractive option for me

Section E: Future of Transport

We now want you look to the future and to think about transport in N Ireland in 10 years-time and beyond Covid.

E1. Looking to the future, and thinking about **public transport (buses and trains)** in Northern Ireland, what single thing would you like to see change to better meet your needs as a consumer?

E2. Looking to the future, and thinking about **transport by car** in Northern Ireland, what single thing would you like to see change to better meet your needs as a consumer?

E3. Looking to the future, and thinking about **planes and ferries**, what single thing would you like to see change to better meet your needs as a consumer?

E4. And again, looking to the future, and thinking about **active travel such as walking and cycling**, what single thing would you like to see change to better meet your needs as a consumer?

E5. Please say if you agree or disagree with each of the following statements in relation to climate change and transport.

Supportive	1
Neither supportive nor unsupportive	3
Unsupportive	4
Don't know	6

2	More investment in electric / hydrogen driven buses and trains
3	Greater provision of cycle lanes in my local area
4	More bus routes / more flexible bus routes
5	Transport services being better connected / integrated
6	More investment in the rail network
7	Legalised use of e-scooters under regulation
8	Free public buses and trains paid for completely by NI government funding
9	Having a 'circle line' train service serving Antrim, Lisburn and Greater Belfast

Section F: Consumer Protection

F1. The Consumer Council for Northern Ireland has a statutory responsibility to represent the interests of consumers in Northern Ireland. Before taking part in this survey were you aware that the Consumer Council has a responsibility for representing the interests of NI consumers in relation to each of the following..?

Yes	1
No	2
Don't know	3

1	Buses
2	Trains
3	Airlines
4	Ferries
5	Taxis
6	Transport in N Ireland generally

F2. Is there a particular aspect of transport in Northern Ireland where you feel you need greater protection as a consumer?

Yes	1
No	2
Don't know	3

ASK IF F2 EQ 1

F3. Which area do you feel you need to be better protected?

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 full-time (but currently on furlough)	3
Working part-time	4
Working part-time (but currently on furlough)	5
Seeking work for the first time	6
Unemployed, i.e. not working but actively seeking work	7
Not actively seeking work but would like to work	8
Not working and not seeking work	9
Looking after home and family	10
Unable to work due to permanent illness or disability	11
Student (full time)	12
Student (part time)	13
On a government or other training scheme / apprenticeship	14
Retired	15
Other (please specify)	16

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. 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