TRANSPORTEAST

# Transport East Travel & Behaviour Survey Report

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# Executive Summary

# i Project Background

## Overview

### Purpose

The Transport East (TE) region has historically relied on the Census Travel to Work data to understand the travel behaviour of their residents and to inform their work. However, with the 2021 Census being undertaken during the Covid-19 pandemic and the 2011 data now outdated, there is a need to supplement this with a travel and behaviour survey. Also, data on trip patterns, attributes and perceptions are limited, relying mostly on the National Travel Survey for aspects such as journey purpose by mode.

This study provides analysis and insight to be used alongside wider datasets, evidence and insights to inform the development of strategies, policies and planning. This includes regional and local transport authority level insight.

### Objectives

The survey results will help to address and inform the following objectives:

- To understand current travel patterns, including journey purpose, demographic segment, and place of residence, as well as the transport needs
- To capture attitudes towards changing modes of transport, including the barriers to change
- To consider travel patterns at district and Local Transport Authority geographies.
- To understand factors that influence travel choices for those who live within the same area.
- To fill gaps from the 2021 census and reconcile against the 2021 census.
- To capture travel changes post-Covid.

### Methodology*

An online survey was carried out between 18th March to 17th April 2024.

The survey captured 3,824 responses from across the TE region and included 105 from 20 miles radius outside of the region to capture those from outside who travel in. The appendix provides more context on why they were included. The survey used a panel and open link, which was shared across the region. The sample achieved 3,000 panel link responses and 824 open link responses.

Respondents were recruited based on quotas that were reflective of the proportion of residents in a district and LTA. This was taken from the Census 2021 within the Transport East region.

Demographics were not controlled for when recruiting respondents. Thus, data in the report is weighted to be reflective of the relative sizing of age and gender from the Census for each district in TE.

* Note: further details on the methodology are shared in the appendix of the report

# ii Fieldwork Summary

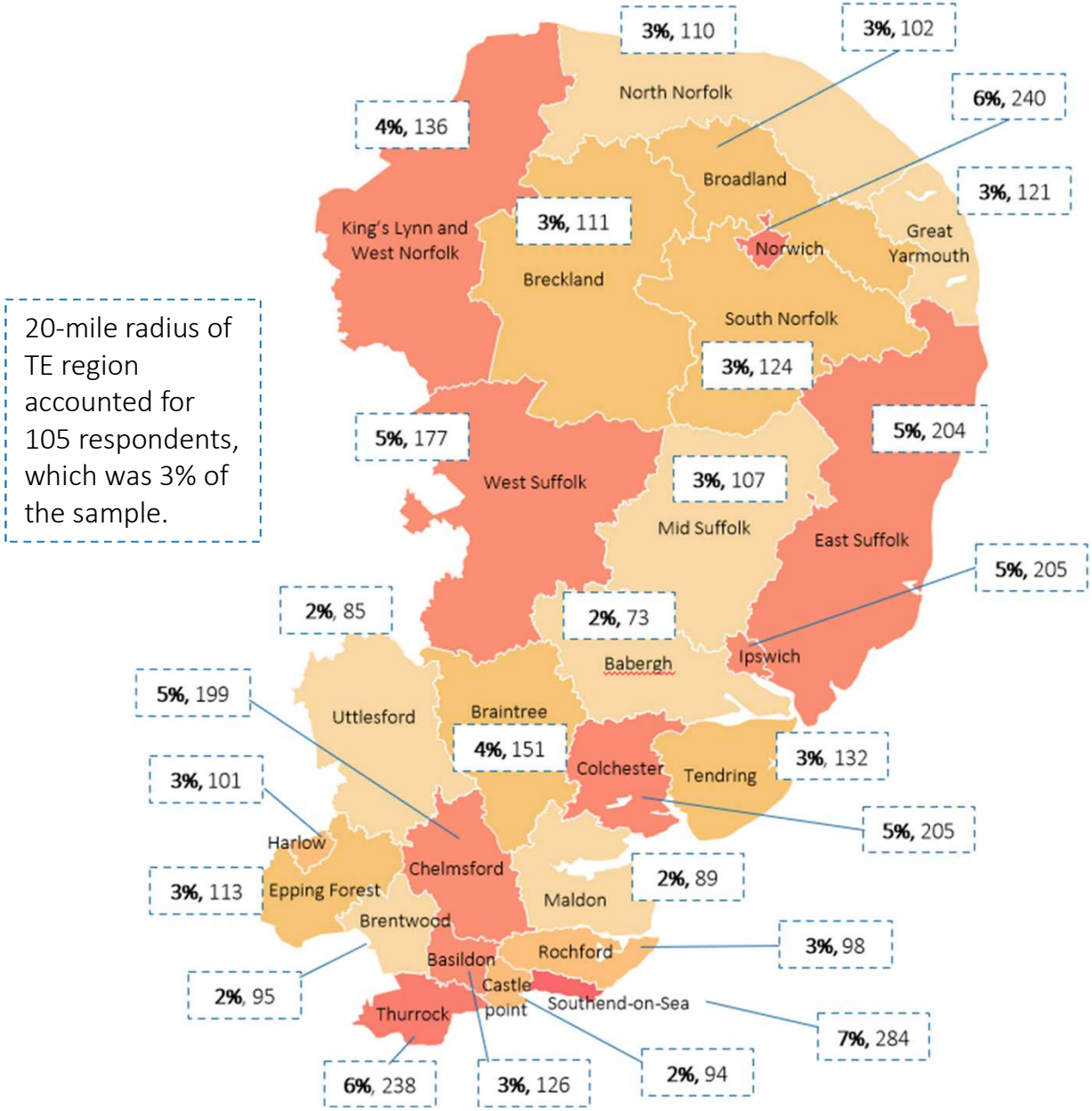
## Distribution of responses and % of total responses

The map to the right shows the number of responses and response rates across the region. These were controlled by target quotas based on the Census 2021, to minimise bias of any one district or authority. The numbers are the sum of both the panel and open link responses.

Of the Local Transport Authorities (LTAs, detail on page 9), Essex had the highest number of responses (1,488 responses) and accounted for 39% of the total responses. However, it was the only LTA where not all districts achieved their target response rate (detail on page 9). Despite this, the sample size of each district is large enough to provide data to analyse.

Southend-on-Sea achieved the highest uplift in responses from the open link, with a 96% increase above the initial target (from 145 to 284 in the results).

At a district level, Mid-Suffolk council area achieved the largest number of responses relative to the initial target (target of 50; achieved 107 responses).




Note: the map shows the % of total responses, and the number of responses of each district

# iii Summary of Results

## Current travel behaviours

**Walking and cars are the primary modes of transport in the Transport East region and are expected to remain dominant in the near future.**

**However, the survey identified opportunities to increase the use of public transport, bicycles and walking, provided that the barriers are addressed and effective messages are communicated.**

**Bus Barriers:** inconvenient, infrequent services (e.g. availability of early/late services)

**Bus Motivators:** increase the frequency, reliability, and reach of services

**Train Barriers**: inconvenient, high ticket costs

**Train Motivators**: reduce ticket costs

**Cycling Barriers**: lack of dedicated cycling infrastructure and poor route lighting leads to safety concerns, particularly in terms of road traffic

**Cycling Motivators**: invest in safe, well-maintained and well-lit segregated bike lanes

**Walking Barriers**: poor surface quality, lighting and lack of well-connected pavements /footpaths lead to safety concerns

**Walking Motivators**: invest in well-lit, well-maintained and wider walkways

## Attitudes to climate change

Many respondents agreed that councils, government and large companies should do more to help the environment. For example, creating quieter neighbourhoods and clean air zones, investing in public transport services and walking and cycling infrastructure are welcomed.

## Attitudes to funding

Over half of the respondents prioritise funding for better road conditions and public transport services. Many stated that road charges based on vehicle emissions and vehicle type are the fairest ways to address funding gaps.

## Future messaging

Alongside actions to address barriers to travel, responses suggested that personal health benefits are the most effective message to motivate behaviour change, according to respondents.

# 1.0 Introduction

# 1.1 Project Background

## Overview

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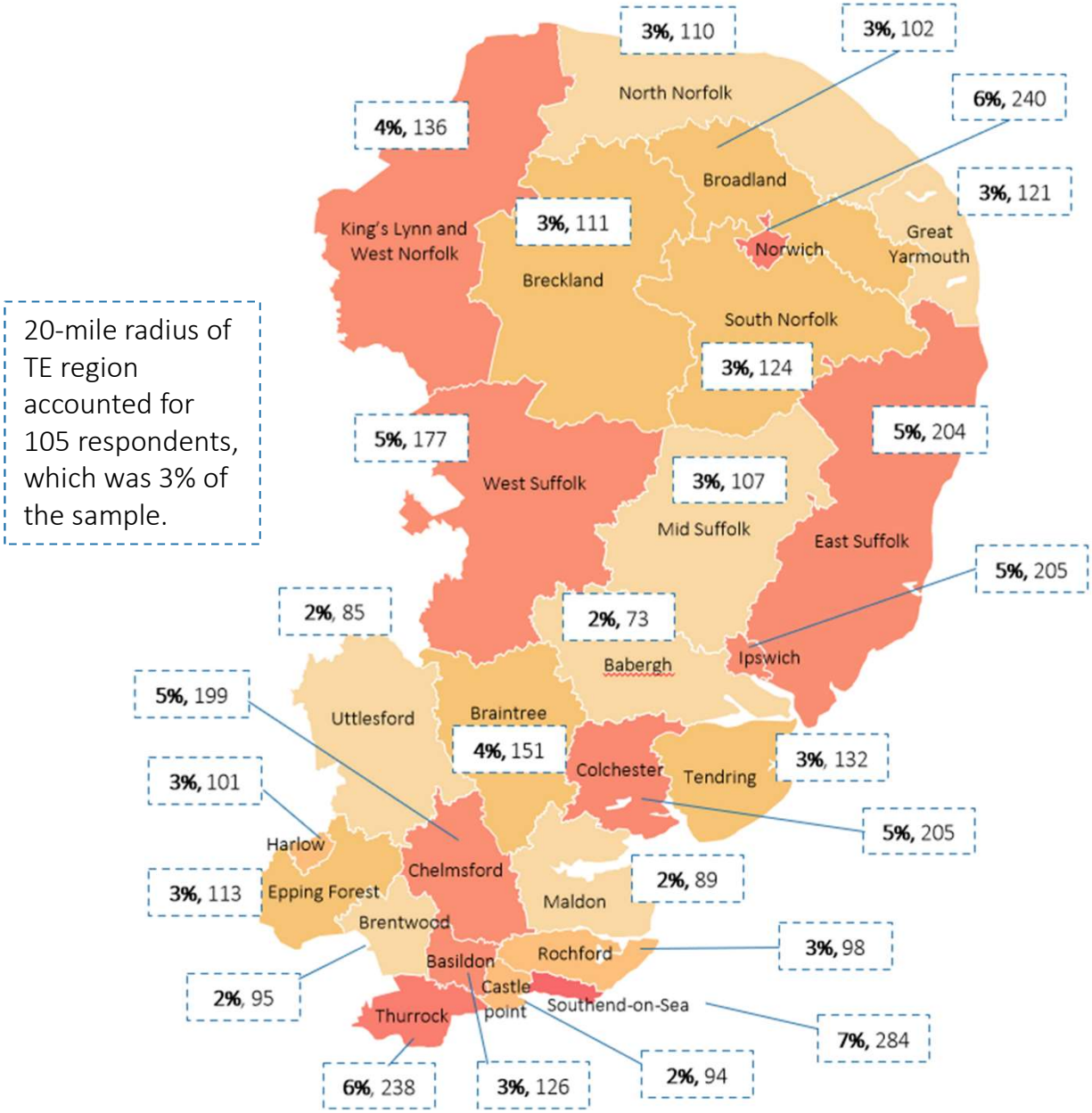
20-mile radius of TE region accounted for 105 respondents, which was 3% of the sample.



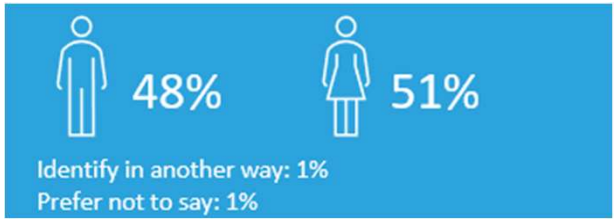

Note: the map shows the % of total responses, and the number of responses of each district

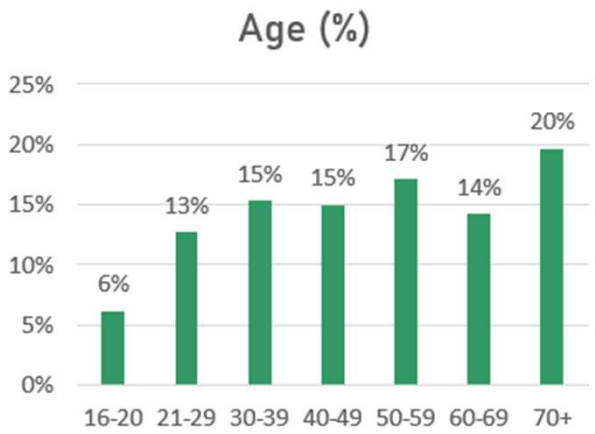
# 2.0 Demographics of Survey Results

Demographics were not controlled for when recruiting respondents to maximise responses. Therefore in the report is weighted to be representative of age and gender from the Census 2021 for each district in the TE region. See Appendices 7.1 for further information on methodology and weighting

# 2.0 Demographics

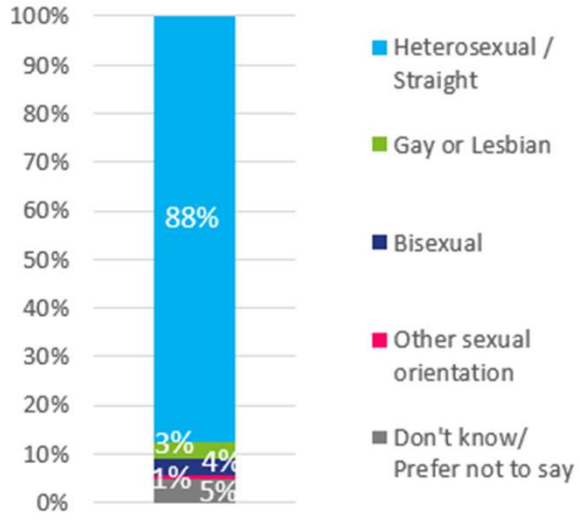
## Age & Gender



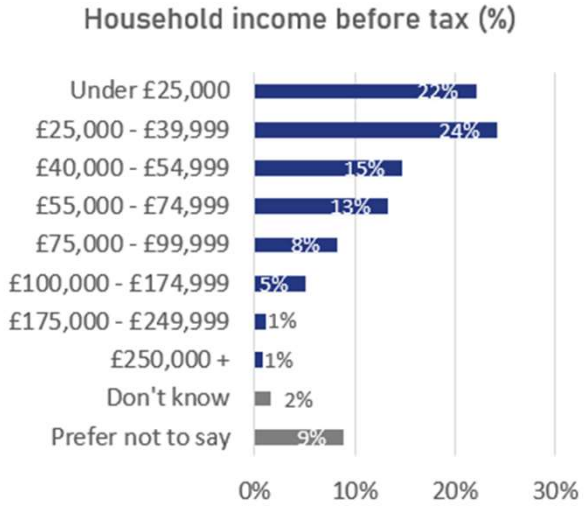




At a regional level, the sex distribution of the survey is split equally between women and men. This is in line with the 51% women; 49% men split recorded in the Census 2021. Half of respondents are aged 50 and above. The survey also captured 34% who were aged 60 years or over - the latter is higher than Census 2021 figures, where 24% state they are 60+.

## Sexual Orientation




## Household/living status




**Average household size**
**2.7**

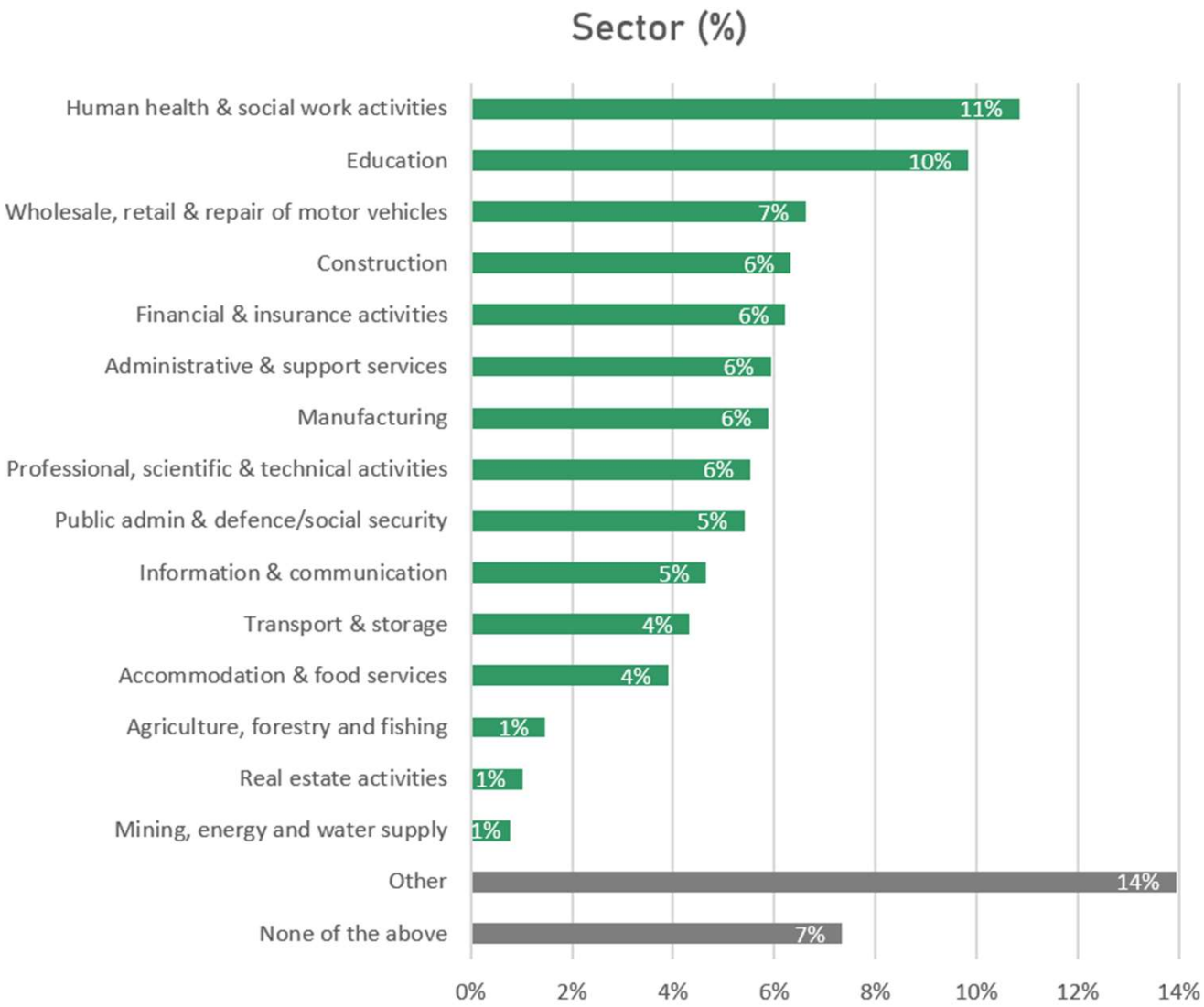
**31% have children in the home of whom 77% are currently attending school**

18% of respondent report living alone. A further 74% report they live in a household of 2-4 people (including themselves). The average household size was recorded as 2.7, which is in line with figures reported by the Census 2021. Respondents are most likely to live with their partner (61%), followed by children at 31%.

Most households have an income of £55,000 or less, averaging at £45,000, with 24% in the £25,00-£39,999 category. This is higher than the 2022 UK average of £33,200 (ONS Household Finances survey, 2022).

*Note: All reference to Census 2021 is at an overall England and Wales level*

# 2.0 Demographics




## Employment/study status

### 64% currently work

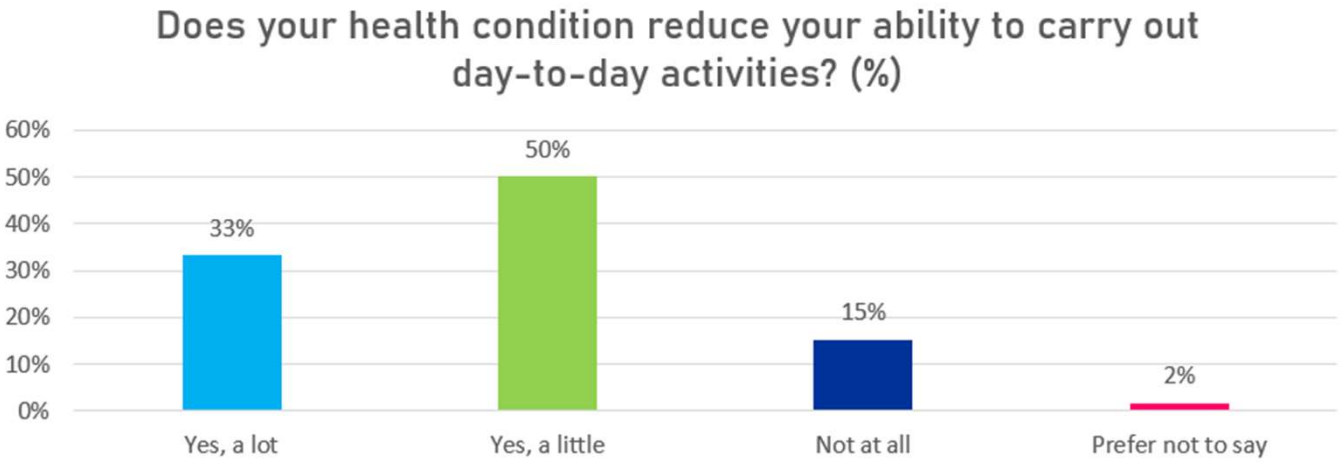
64% of the respondents stated they are currently working in a typical week. This is higher than in the Census 2021, where 57% were employed on the week of filling in the survey. Of those not working, 68% are retired, and the rest are studying, looking after home or family, or unable to work due to sickness or disability.

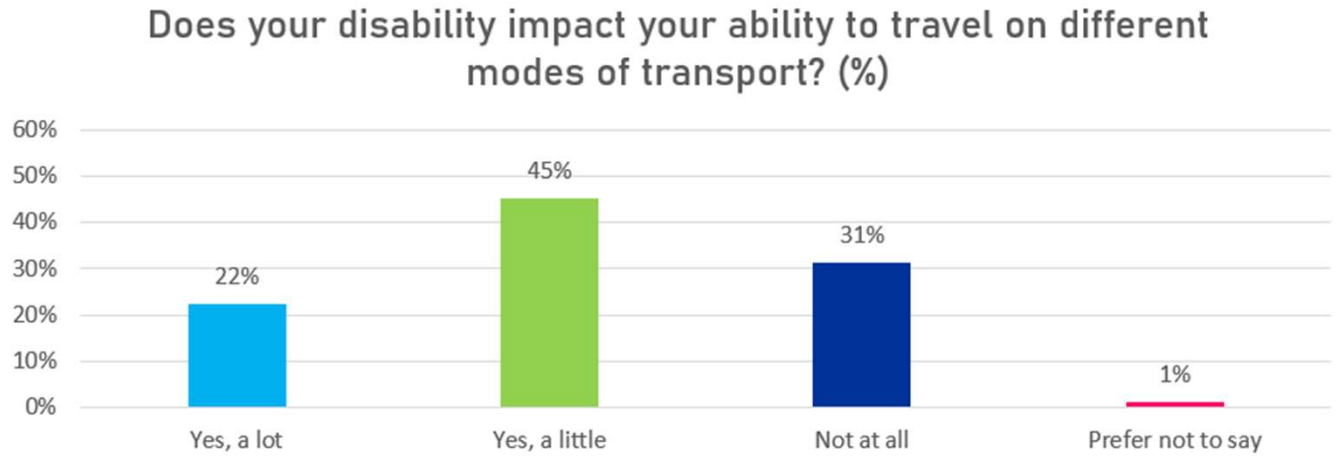
Respondents work in various sectors, with human health & social work activities and education being the top 2, 11% and 10% respectively. Education is second highest in the Census 2021, echoing the results here, while more respondents work in human health and social work activities compared to the Census 2021.

The 14% of respondents that selected 'other', were required to input a response for their employment. These included jobs for which the category was unclear e.g. local government, cleaner, etc.

Note: All reference to Census 2021 is at an overall England and Wales level

# 2.0 Demographics




## Disability

**21%**

**Have long-term physical/mental health conditions or disability**

According to the 2021 Census data, 18% of people reported having a long-term health condition, which is slightly lower than 21% captured in this survey.

Of the respondents with physical or mental health conditions/illness, 28% reported difficulty with mobility.

Most individuals with disability stated that their condition reduces their ability to carry out day-to-day activities and impacts their ability to use various modes of transport.

1 in 3 of this group also require assistance in their day-to-day activities, with 57% having a helper/ personal assistant/carer, and 33% using a mobility scooter or wheelchair.

Note: All reference to Census 2021 is at an overall England and Wales level

# 3.0 Current Travel Behaviours and Attitudes

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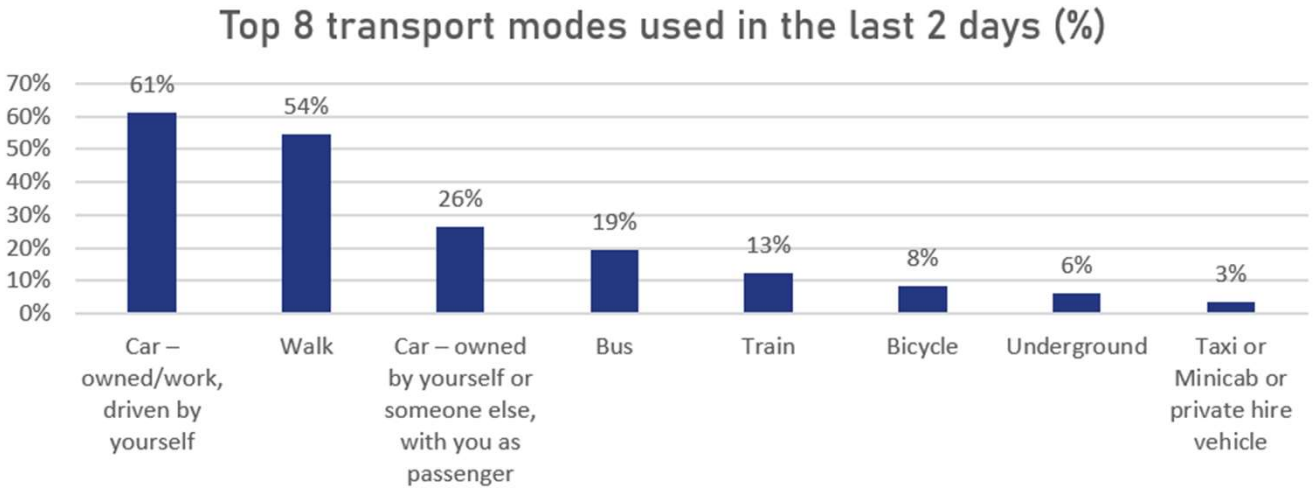
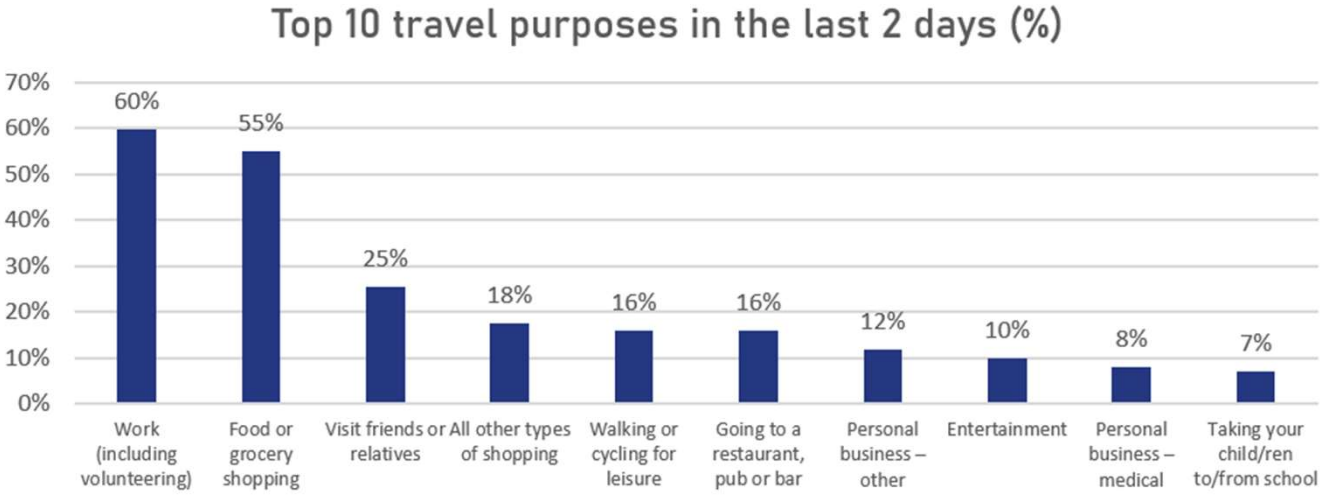


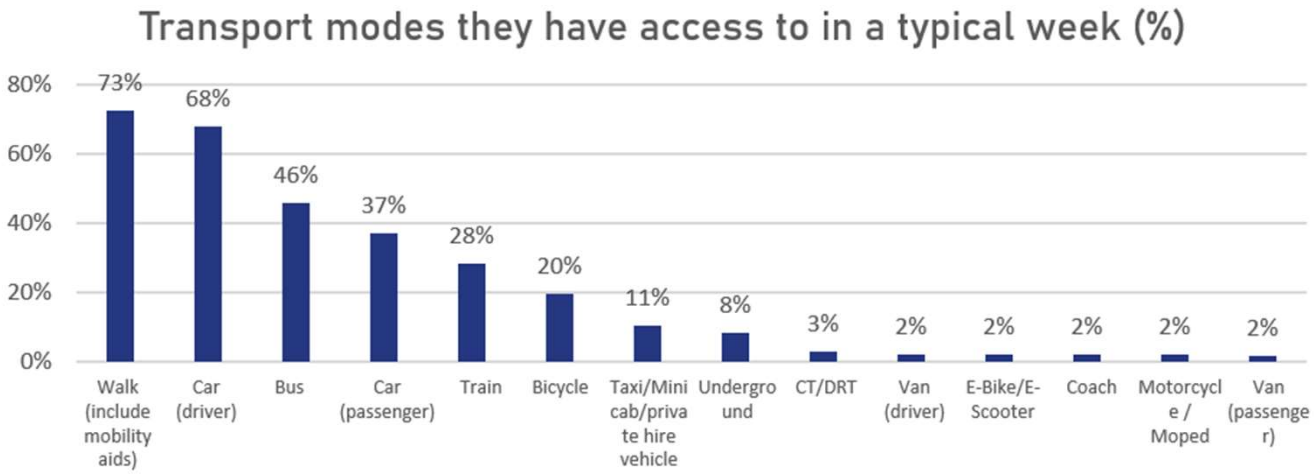

## Travel behaviours in the last two days

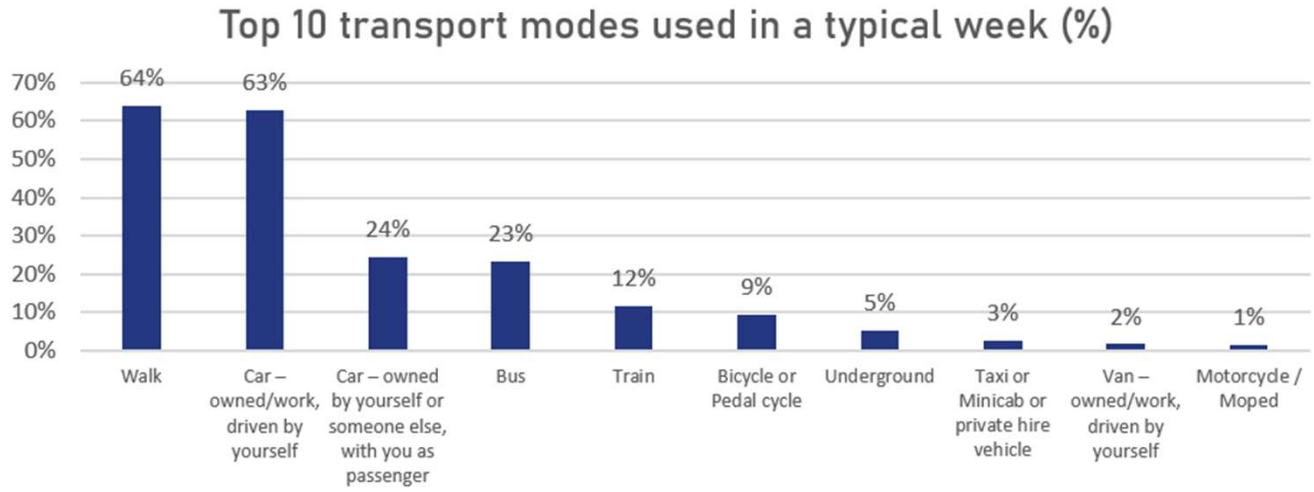
To assess respondents most recent travel behaviour, we asked how people had travelled in the last 2 days. At the time of completing the survey, 77% of people had travelled to other places in the last 2 days. Of those who did not travel, 3 out of 4 stated that they had no need to travel over that period.

The most used modes of transport during those 2 days was by car (either as a driver or a passenger) and walking. When examining differences in transport usage by sex, men (11%) are more likely to report cycling than women (5%). Also, those aged below 24 were more likely to cycle, and travel by train than older people.

The primary purposes of travel in the last two days were going to work (60%) and food/grocery shopping (55%), which remained consistent across different demographic groups. On average, respondents spent 39 minutes travelling to work, and 23 minutes travelling for food or groceries (one-way trip) over the 2 days.

# 3.0 Current Travel Behaviours & Attitudes




## Transport modes used in a typical week

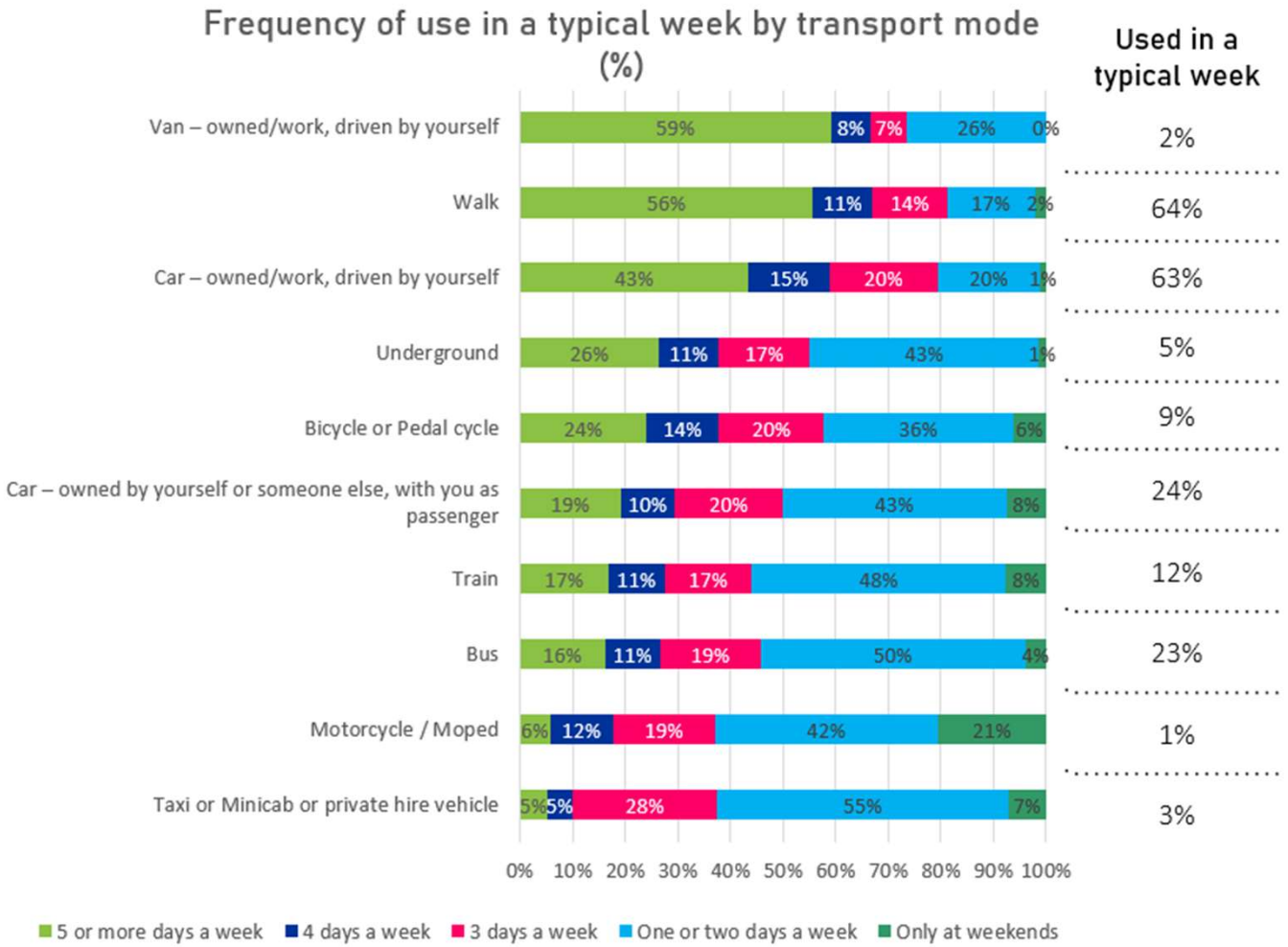
We asked respondents to consider their typical travel patterns, which may differ from the last 2 days. While respondents have access to public transport options such as bus, train and Underground, only a quarter report using the bus in their typical week and other public transport less often. Combined usage of bus, train and underground is 31%[1].

Walking and driving are the most used transport methods, which is consistent with the findings of the 2022 Department for Transport's National Travel Survey where car came out as top mode of transport used in England, followed by walking.

Individuals with a lower household income of under £25k are more likely to travel by bus. Age is also a factor, with those aged 16-29 or 70+ more likely to use the bus. Train usage is higher among younger age groups (16-49) compared to those older, aged 70+.

*[1] The NET % of bus, train and underground usage has been adjusted to account for any overlap between items, reflecting a more accurate overall percentage*

# 3.0 Current Travel Behaviours & Attitudes




## Frequency of use in a typical week

Van drivers are travelling most frequently, with 3 in 5 travelling by van 5 or more days a week, despite only 2% of the respondents using this transport mode in a typical week (see page 16). This reflects those who drive as part of their job and use a van for this purpose.

Walking and driving (either owning a car or using a work-provided car) are also one of the most frequently used transport methods in a typical week.

Train, bus and taxi are used more infrequently, around one to two days a week being most common.

Also, it is worth noting that motorcycles or mopeds are most used on weekends in comparison with other modes.

# 3.0 Current Travel Behaviours & Attitudes

| | | | |
|---|---|---|---|
| **Walking** | Walking or cycling for leisure (58%) | Food or grocery shopping (47%) | Work, including volunteering (42%) |
| **Car** (as driver) | Food or grocery shopping (79%) | Work, including volunteering (75%) | Visit friends or relatives (59%) |
| **Car** (as passenger) | Food or grocery shopping (59%) | Leisure and entertainment (54%) | Visit friends or relatives (54%) |
| **Bus** | Work, including volunteering (56%) | All other modes of shopping (39%) | Leisure and entertainment (37%) |
| **Underground** | Work, including volunteering (76%) | Leisure and entertainment (34%) | Visit friends or relatives (28%) |
| **Cycling** | Walking or cycling for leisure (62%) | Work, including volunteering (49%) | Food or grocery shopping (32%) |
| **Train** | Work, including volunteering (87%) | Leisure and entertainment (36%) | Visit friends or relatives (27%) |
| **Taxi/Minicab** | Work, including volunteering (60%) | Leisure and entertainment (26%) | Visit friends or relatives (25%) |
| **Van** (as driver) | Work, including volunteering (86%) | Food or grocery shopping (25%) | Personal business (16%) |
| **Motorbike/Moped** | Leisure and entertainment (65%) | Visit friends or relatives (49%) | Work, including volunteering (45%) |

## Travel purposes in a typical week

The most common trip purposes are food or grocery shopping, work (including volunteer), visiting friends or relatives, and leisure and entertainment.

People are more likely to travel for food/grocery shopping by car, either driving themselves or as a passenger.

Various transport modes are used for work trips, including buses, trains, Underground, taxis and vans. Walking and cycling are most frequently done for leisure with dog walking one of the main reasons people to go out for a walk.

According to the National Travel Survey, shopping and commuting emerged as the most common trip purposes in England in 2022, reflecting the travel behaviours observed among respondents of the Transport East region.

# 3.0 Current Travel Behaviours & Attitudes

| | | | |
|---|---|---|---|
| **Walking** | It is a short journey (54%) | Better for the environment (45%) | Is convenient (41%) |
| **Car** (as driver) | Is convenient (63%) | Enables me to get to and from where I need to go (61%) | Always available/ flexibility(56%) |
| **Car** (as passenger) | Is convenient (56%) | Enables me to get to and from where I need to go (51%) | Is comfortable (46%) |
| **Bus** | Is convenient (45%) | Enables me to get to and from where I need to go (42%) | Better value for money (41%) |
| **Underground** | Is fast at getting me to my destination (42%) | Is convenient (36%) | Enables me to get to and from where I need to go (35%) |
| **Cycling** | Better for the environment (59%) | Better value for money (48%) | Is convenient (46%) |
| **Train** | Is convenient (53%) | Is fast at getting me to my destination (50%) | Enables me to get to and from where I need to go (41%) |
| **Taxi/Minicab** | Is convenient (45%) | Enables me to get to and from where I need to go (45%) | Is fast at getting me to my destination (40%) |
| **Van** (as driver) | Enables me to get to and from where I need to go (36%) | Is convenient (35%) | More suitable when I travel for this purpose (31%) |
| **Motorbike/Moped** | Is fast at getting me to my destination (58%) | Is convenient (51%) | Always available /flexibility (50%) |

## Reasons for choosing each transport mode in a typical week

The top reason people choose their selected transport modes in a typical week is convenience, followed by the suitability of the transport for getting to and from their destinations.

Environmental reasons can also be a contributory factor choosing a particular transport mode. For those who opt to walk, 45% choose to because it is better for the environment, and 59% of those who choose to cycle do so for the same reason.

Better value for money is also one of the primary reasons for choosing bus and bicycle when travelling.

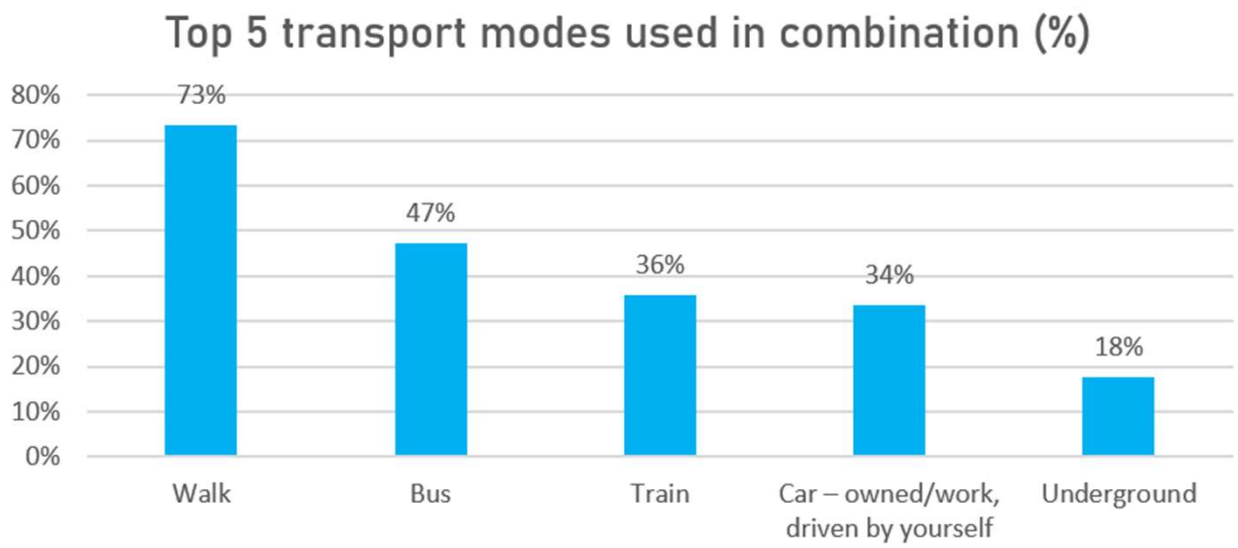
# 3.0 Current Travel Behaviours & Attitudes

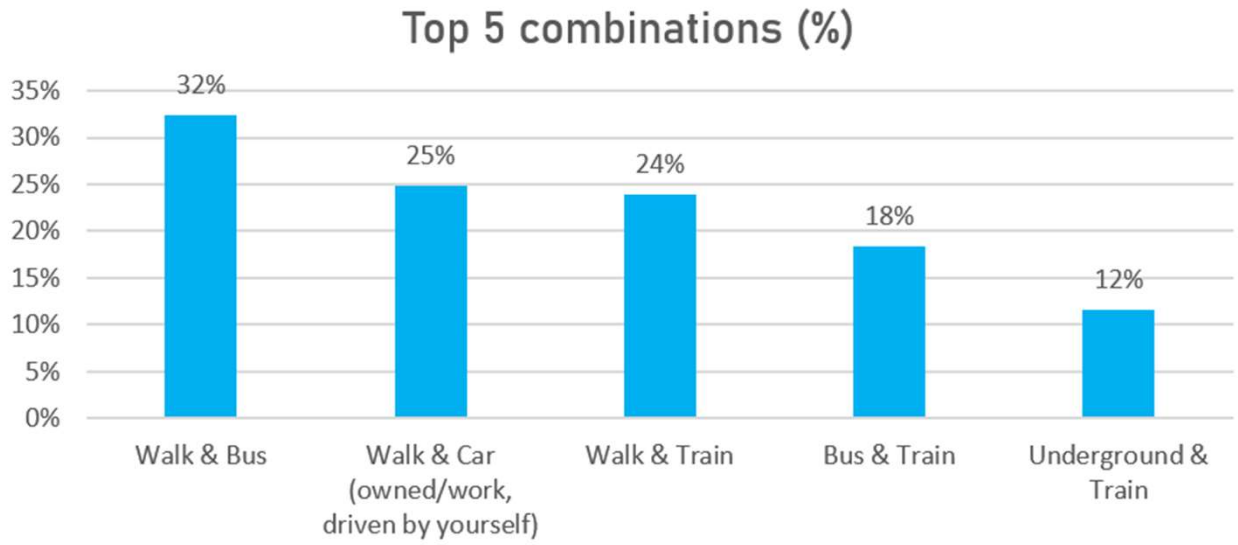
## Combining transport modes in one trip

**28%**
**Combine more than one mode of transport into one trip**

Average number of transport modes combined: 2.4

3 in 10 of the respondents typically combine more than one transport mode into a single trip. Among those who do combine, they typically use two transport modes per trip. Walking, bus and train are the transport modes that are most likely to be used in combination with others. For instance, combinations such as walking and taking the bus, walking and driving, as well as taking the bus and train in a single trip are frequently reported.

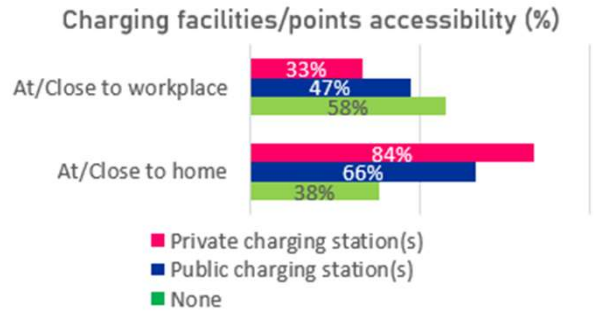


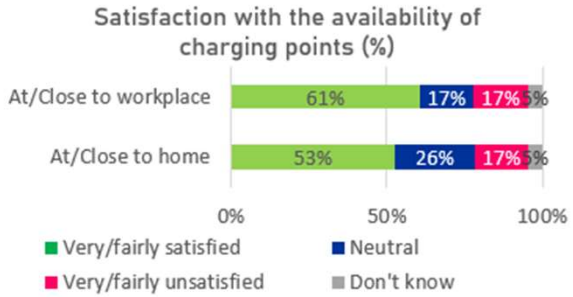



# 3.0 Current Travel Behaviours & Attitudes

## Electric vehicle charging facilities/points

Seven percent of car owners surveyed have an electric vehicle or plug in hybrid. Among them, 84% report easy access to private charging stations and 66% report easy access to public charging stations. However, only 53% are very or fairly satisfied with the availability of charging points at or near their home, with 17% of those with at or near home charging provision very or fairly unsatisfied with the availability.




## Road condition

**20%** are very/fairly satisfied with the condition of roads in their local area.

**49%** are very/fairly unsatisfied with the condition of the roads in their local area.

## Use of paid-for parking

Local area (27%)

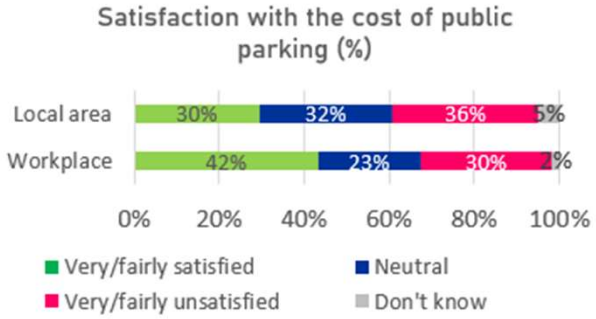
54% are very/fairly satisfied with the parking availability in local area

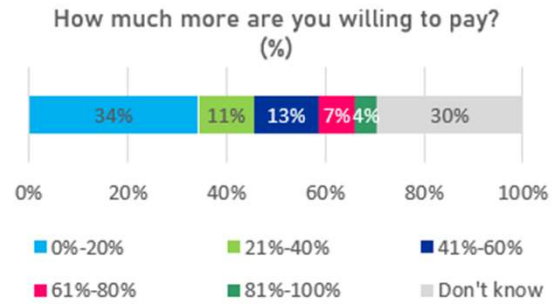
Workplace (14%)

54% are very/fairly satisfied with the parking availability in workplace

## Parking costs

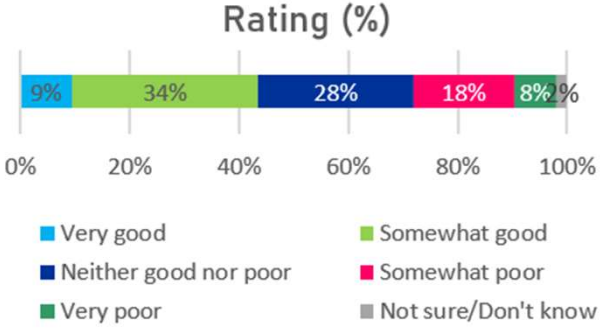
Few are satisfied with the cost of parking in their local area (30%) or workplace (42%). When asked about increases to parking charges, only a small group (4%) is willing to pay 81%-100% more than current parking costs before seeking alternative transport options, with around one third (34%) willing to pay 20% or under more, although a number are uncertain (30%). Those with higher incomes are willing to spend more on parking.



# 3.0 Current Travel Behaviours & Attitudes

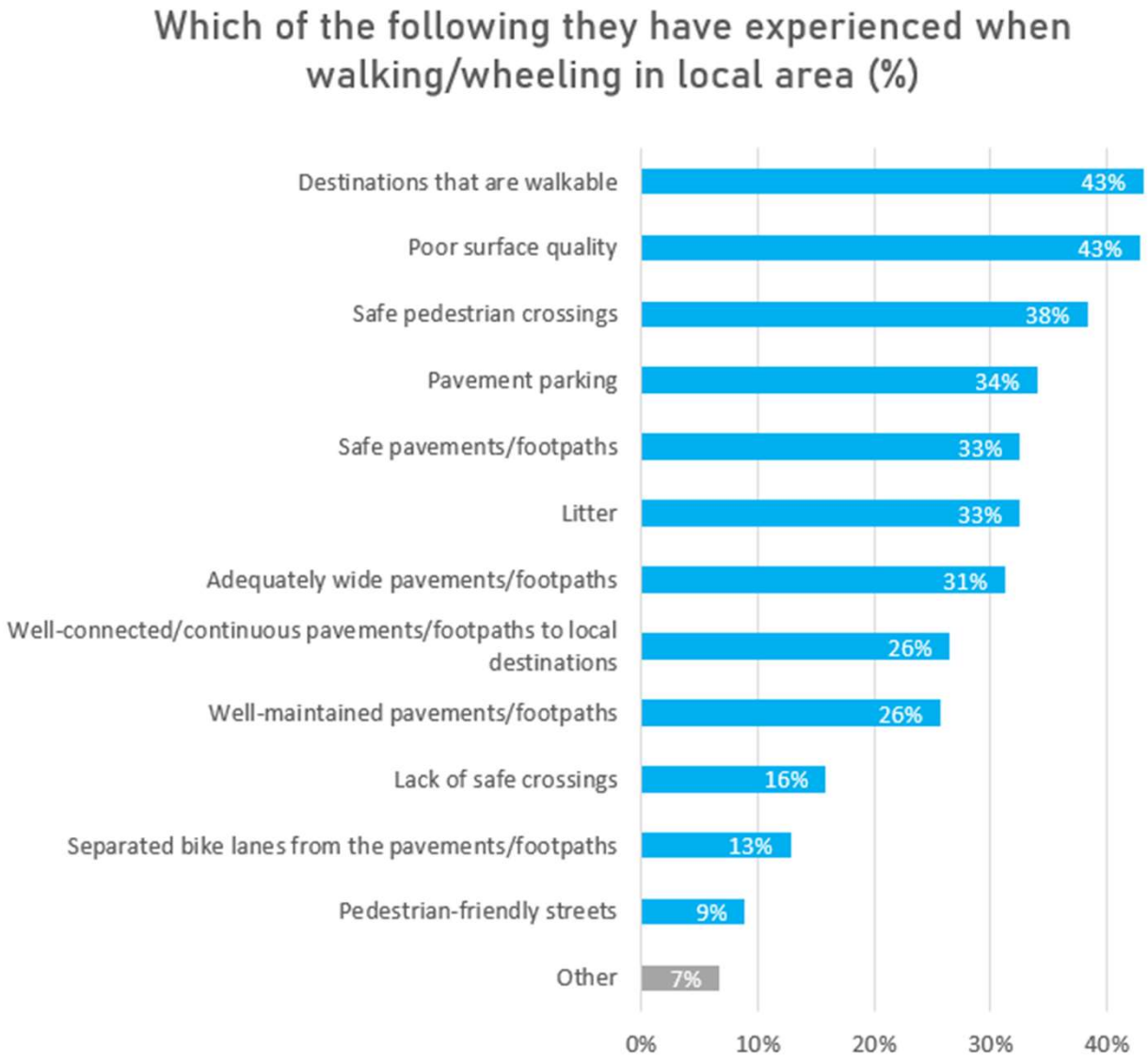
## Walking/Wheeling




43% of respondents rated the walking and wheeling provision in their local area as very good or somewhat good, while around a quarter (26%) rate this poorly.

For 2 in 5 people, destinations are walkable, and they have safe pedestrian crossings. However, a similar proportion also note that these walking areas are of poor quality. Only a quarter of people share that there are connected pathways to get to destinations, and that the paths are well-maintained. This indicates that walking and wheeling are not accessible to all in some local areas .

By wheeling, we mean use of a wheelchair, mobility scooter or other wheeled mobility aid.



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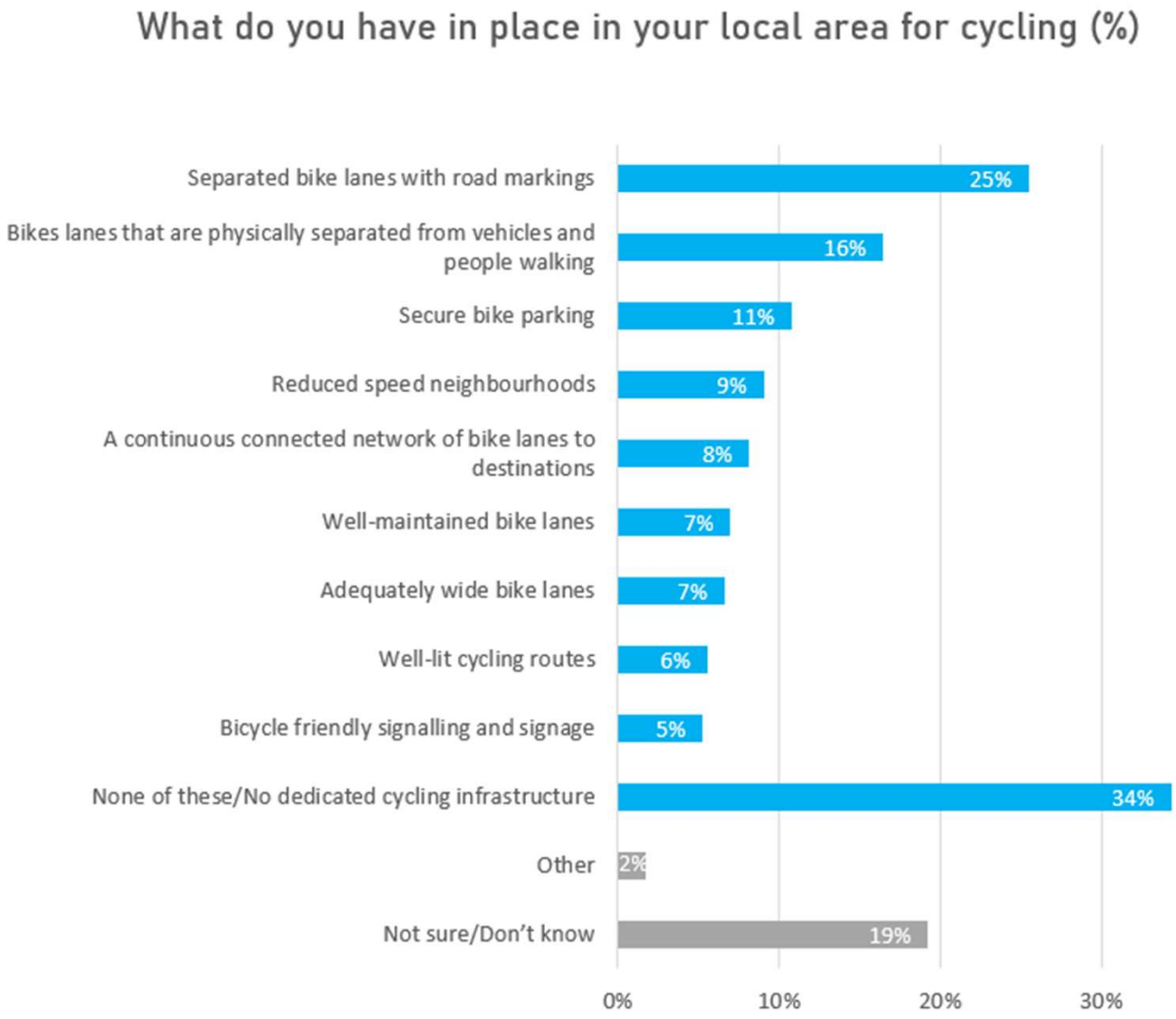


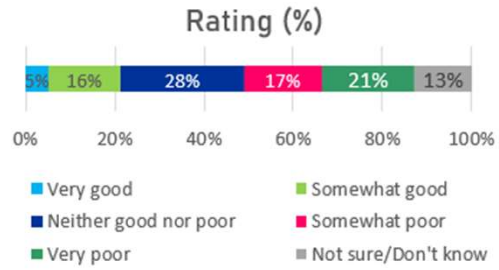

## Cycling

**44%**

**Own or have access to a bicycle**

Findings suggest that despite 44% owning or having access to a bicycle (% of those without disabilities affecting cycling) only 9% cycle in a typical week (pg 18).

Respondents see cycling provision in their area as limited. 34% of the respondents reported no dedicated cycling infrastructure in their area and only 21% rated general cycling provision as good.



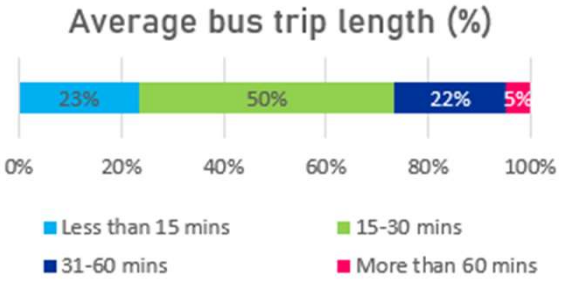
# 3.0 Current Travel Behaviours & Attitudes

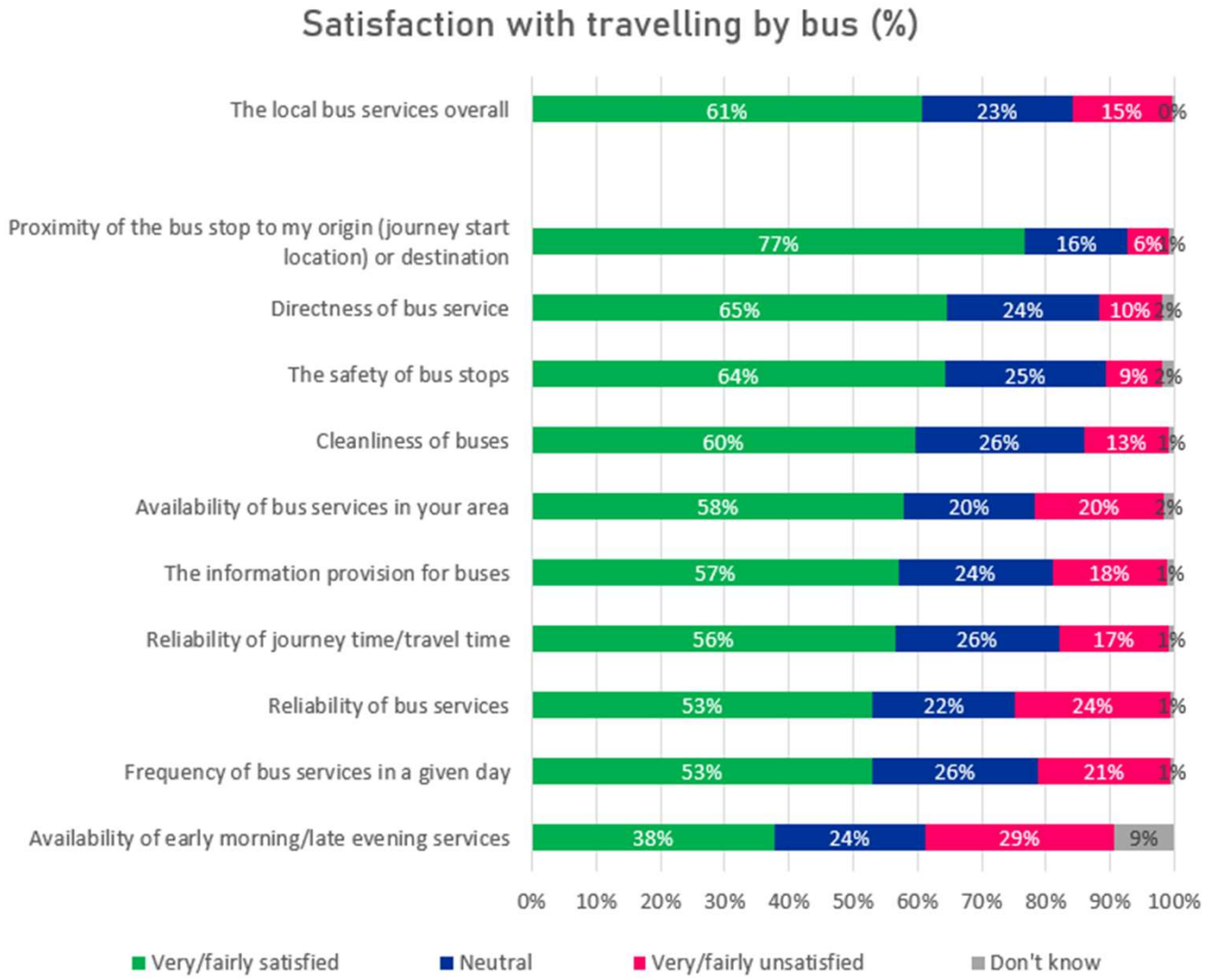
## Bus

Of those using the bus, half indicate their typical bus journey lasts between 15 and 30 minutes, averaging at 26.5 minutes.

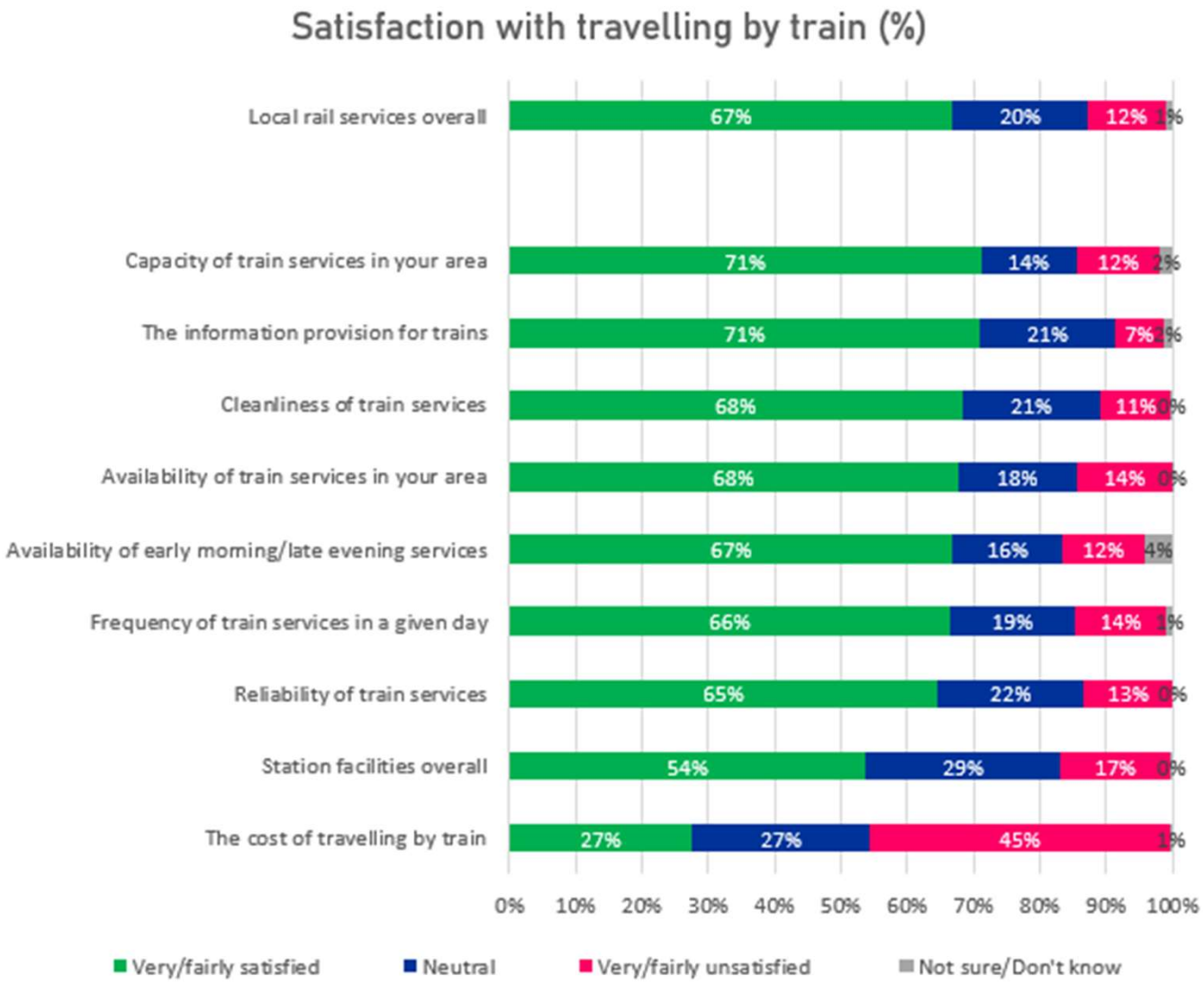
Among bus users, 61% are satisfied with local bus services overall. 77% are satisfied with the proximity of the bus stop to their origin, while 65% express satisfaction with the directness of the bus service. Moreover, satisfaction levels for the safety of bus stops and overall local bus services are also high, with 64% and 61%, respectively.

In contrast, the availability of early morning and late evening services stands out with the highest dissatisfaction rate, reaching 29% among respondents.



# 3.0 Current Travel Behaviours & Attitudes




## Train

Of those using the train, satisfaction with rail services in the TE region is generally positive, with 67% satisfied with local rail services overall.

Particularly, people express high satisfaction levels regarding the capacity of train services in their area, as well as the information provision on trains, with 71% reporting being very or fairly satisfied in both aspects.

The cost of travel emerges as the primary driver of dissatisfaction among respondents, with 45% being very or fairly unsatisfied with the expense of train travel.

Also, when rating station facilities overall, there is a slightly higher reporting of indifference (‘neutral’) and dissatisfaction.

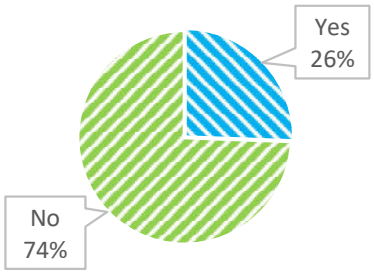
# 3.0 Current Travel Behaviours & Attitudes

## Demand Responsive Transport/Community transport

### Awareness

Most people are not aware of Demand Responsive transport or Community transport. This could reflect the limited areas currently served by DRT services in the region.

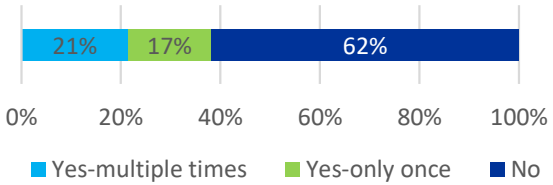
Are you aware of DRT/CT? (%)



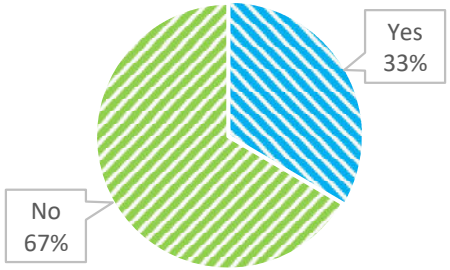

### Usage

Among the 26% who state they are aware of this mode of transport, a minority (21%) have travelled on it multiple times, while a further 17% have used it once. The remaining two thirds of this group have never used it before.

Have you used these before? (%)




Would you be interested in using such service? (%)




### Consideration

Looking at the potential use among all in the TE population, only 33% (including those with no awareness) state that they would be interested in such a service. The remaining 67% are not interested in this service. This attitude towards DRT is the same irrespective disability and across the age groups there are no key differences.

| Interest | Disability | | Age | | | |
|---|---|---|---|---|---|---|
| | Yes | No | 16-29 | 30-49 | 50-69 | 70 + |
| Yes | 37% | 32 % | 34 % | 37 % | 30 % | 34 % |
| No | 63% | 68 % | 66 % | 63 % | 70 % | 66 % |

# 3.0 Current Travel Behaviours & Attitudes

## Taking children to school

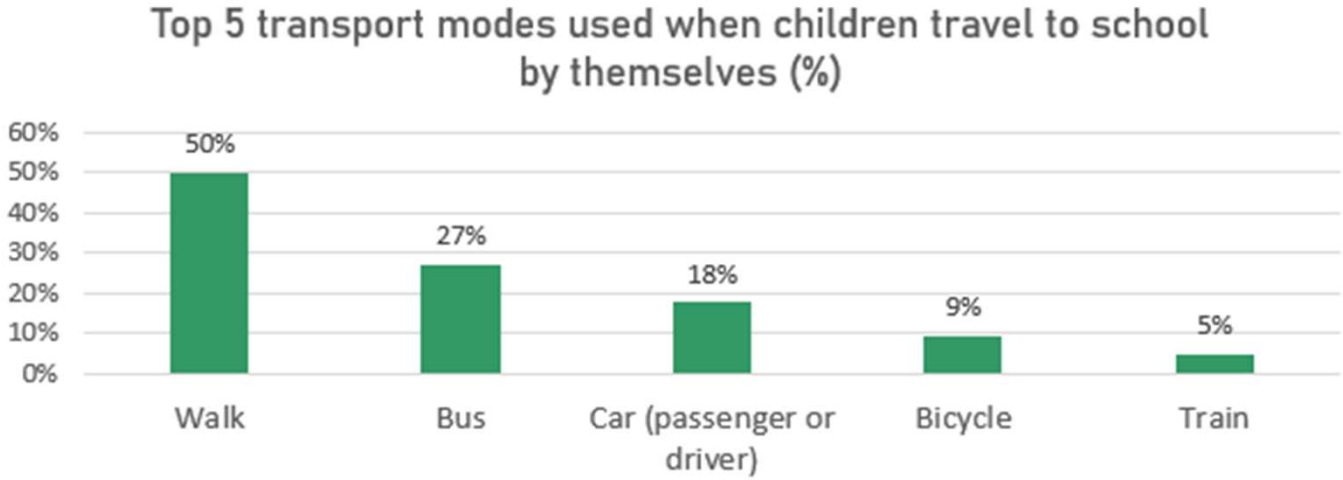
41% of parents with school-aged child/ren do not take their child/ren to school in a regular week. Where parents report that their child/ren travel to school by themselves in a typical week, the children mainly walk (reported by 50% of adults on behalf of their children) or take the bus (27%).

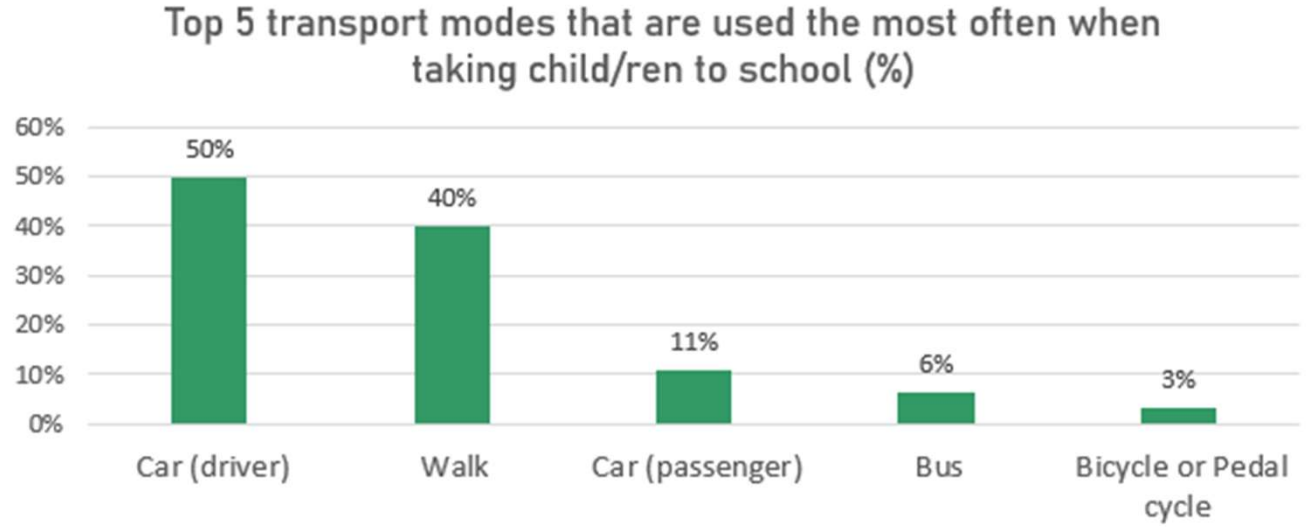
**On average, parents take their children to school**
**4 times a week**

When parents take their child/ren to school, the main mode of transport was the car (50%). 40% reported walking. The main reason cited for not walking their children to school is:

- The distance to the school or nursery (64%), as walking become less convenient for longer distances.
- Time constraint is also a key barrier (30%).

There are no significant differences when exploring this by level of schooling.



# 3.0 Current Travel Behaviours & Attitudes

## Work travel behaviours

### Commuting to work

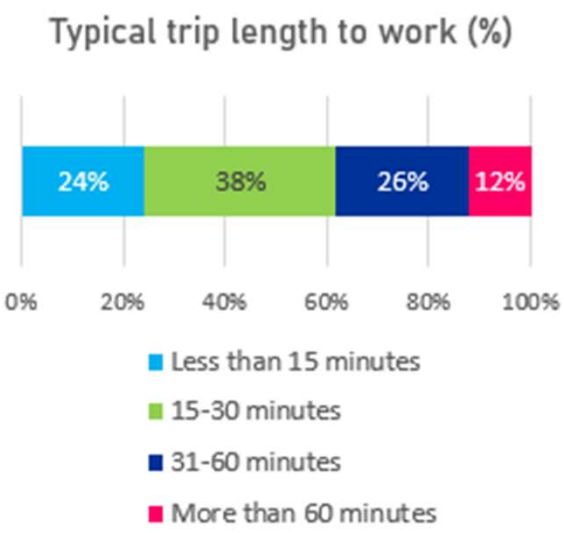
**51% commute to work all the time**

64% of people are currently working. In a typical week, only a small fraction of this group (7%) work from home all the time, indicating people spend at least a proportion of time at a work location.

In an average week, more workers travel to an office or a central location on Tuesdays and Wednesdays (72% each), with Mondays and Thursdays following closely behind (70% each).

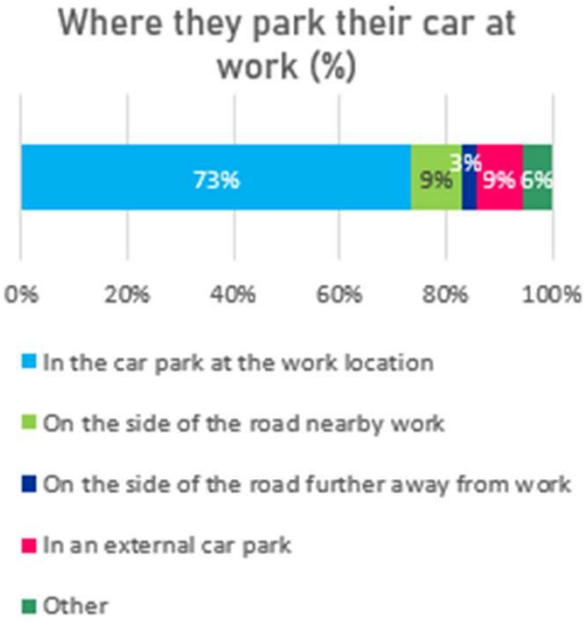
The frequency of commuting is determined by job requirements, with 41% unable to work remotely, 17% mandated by their employer to be physically present, and 16% enjoying the flexibility to choose where they work.

### Typical trip length




When asked about a typical one-way trip length to work, travelling between 15-60 minutes is most common, with people travelling on average 31 minutes to get to their work location. Few will spend longer than 60 minutes travelling to work.

### Car parking




Of those that drive to work, the vast majority can park at the work location. Very few (3%) choose to park on a road that is further from work. For the rest it is usually within proximity to work or an external car park. Of those who stated 'other', these included at a client's home for those moving around for work, or at a location where they park their car before taking another transport mode.

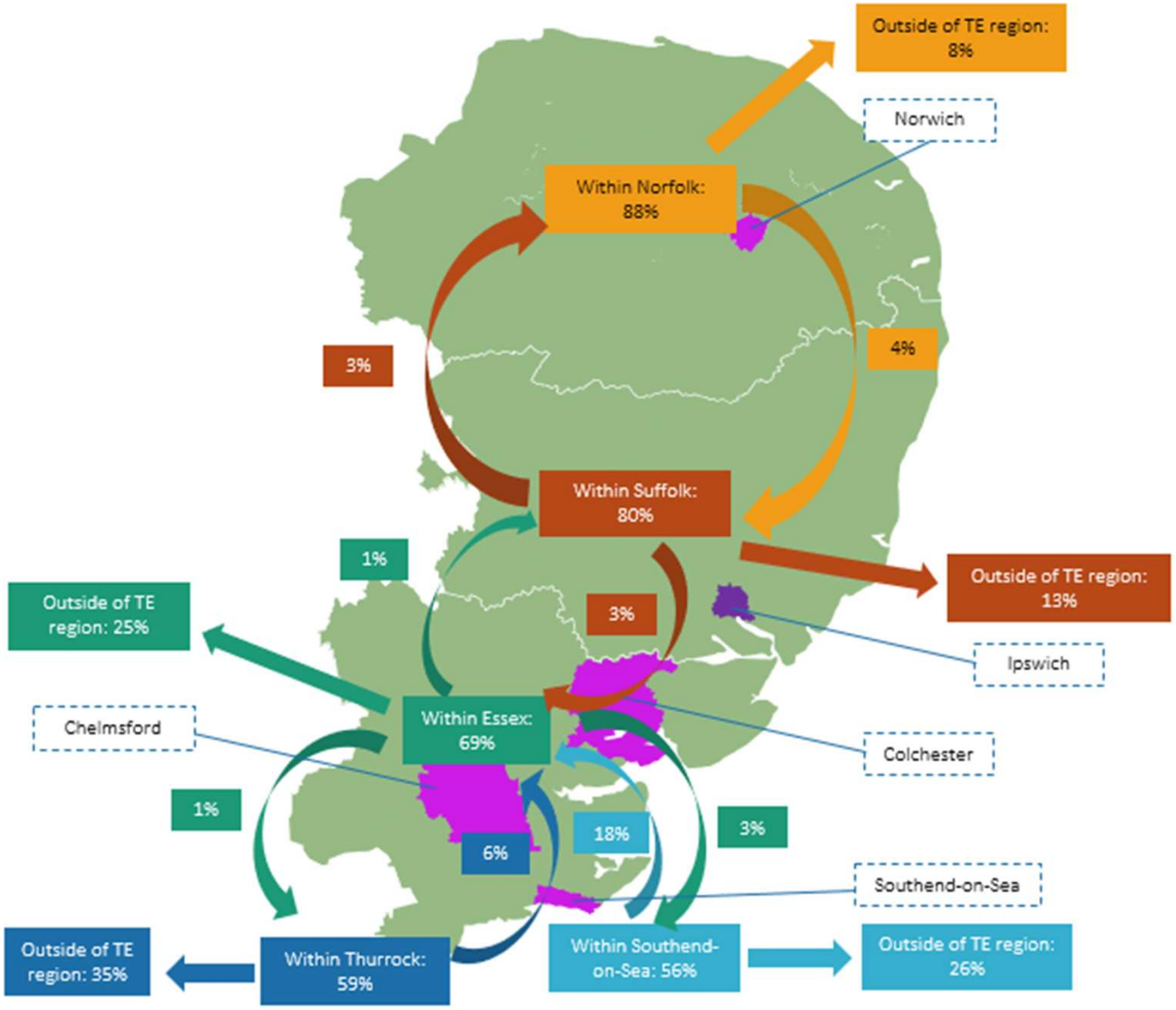
# 3.0 Current Travel Behaviours & Attitudes

## Work travel behaviours

Among the 88% of respondents who provided their work postcode, the majority work within the Local Transport Authority area in which they live. A high level of Norfolk and Suffolk residents work in their respective areas; 88% of Norfolk respondents work in Norfolk, while 80% of Suffolk respondents work in Suffolk.

Respondents of Thurrock, Southend-on-Sea and Essex have between 25%-35% working outside of the Transport East region. A notable portion of these are commuting to London. Also, 18% of those living in Southend-on-Sea commute into Essex for work.

To understand how many are employed within the cities; 20% are travelling to work in the four cities, Norwich, Colchester, Chelmsford, and Southend-on-Sea. Additionally, 7% commute to Ipswich, the main town in Suffolk.



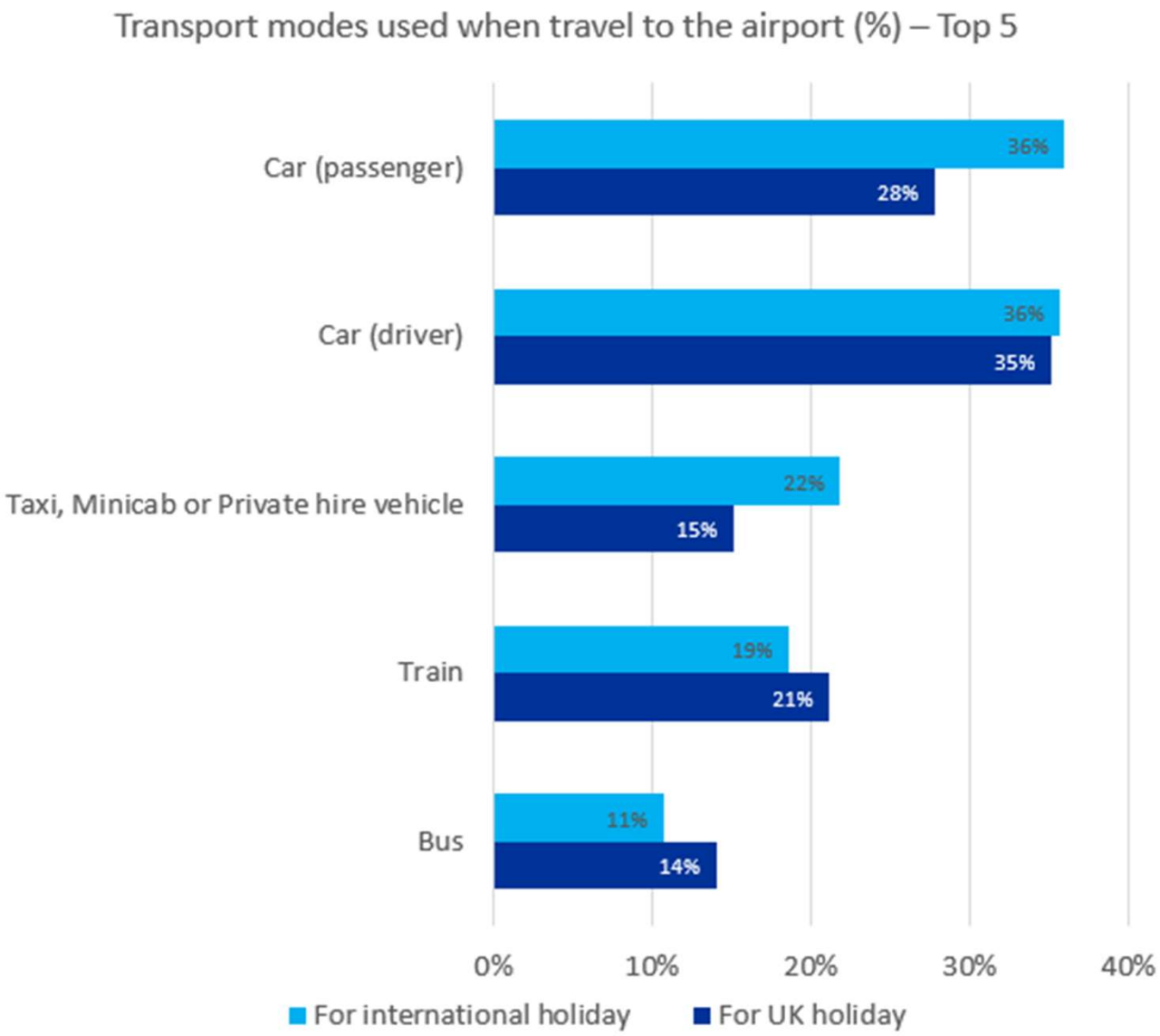
# 3.0 Current Travel Behaviours & Attitudes

## Travelling to the airport for international/UK holiday

The transport modes used when traveling to the airport can vary depending on many factors, and can depend on the destination, i.e. international or a domestic holiday within the UK.

When exploring this in the TE region, the main mode of transport when going on both types of holidays was a car – either as a passenger or as a driver. Though people were more likely to be a passenger in a car or travel by taxi/minicab or private hire vehicle when going to an airport for an international holiday.

Age, gender and income are a big factor as to how people travel to the airport. Women are more likely to be a passenger in car, while men are more likely to be the driver. Those aged 16-29 are more likely to be a passenger in car or choose to travel by train. Those earning more than £100k are most likely to use a taxi, minicab or private hire service.



# 3.0 Current Travel Behaviours & Attitudes

## Shopping

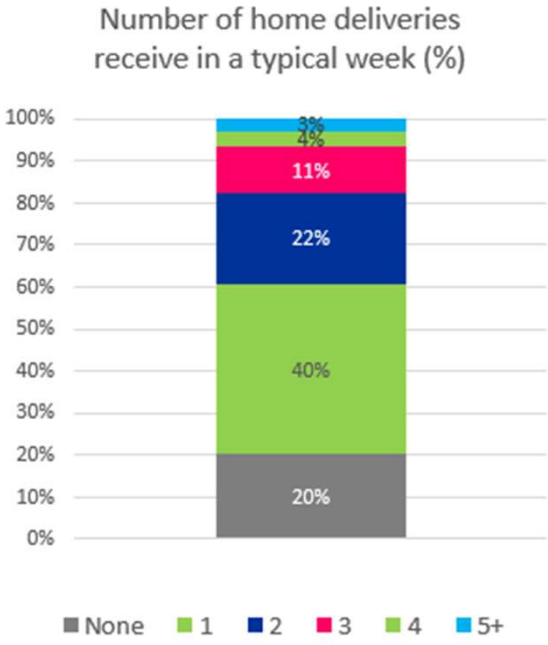
### Traveling for non-food shopping

For typical non-food shopping trips, most respondents visit towns close (46%) to where they live. About a quarter of individuals (25%) opt for nearby cities to where they live for their non-food shopping needs. 41% choose locations close to their home (which could incorporate any area including a village, town or city).
When asked about their frequency of non-food shopping trips, 59% indicated that they don't go out regularly for this purpose, while 28% reported going once or twice a week.


### Home delivery current behaviours

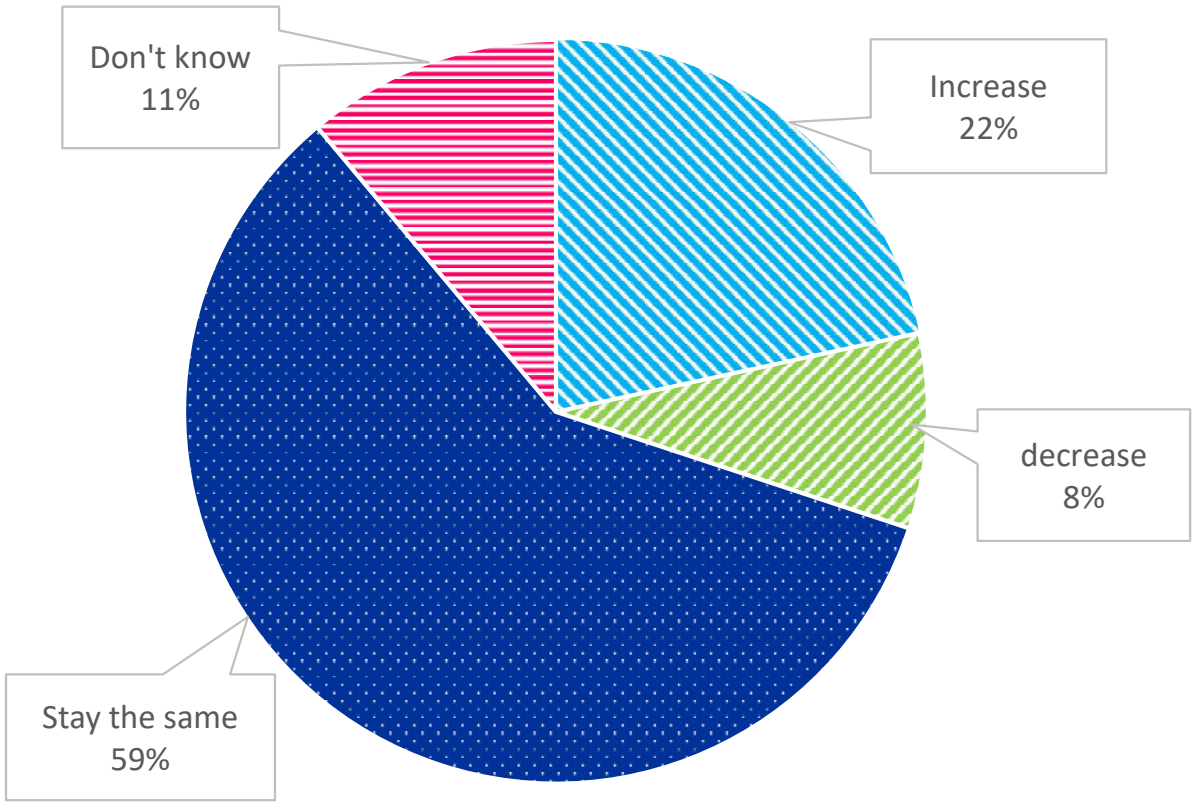

When it comes to home delivery for non-food shopping, 85% of respondents mention using it regularly or sometimes. This usage pattern is particularly pronounced among those aged 30-49 and those earning between £25,000 and £54,999 annually.

In a typical week, 40% of the participants report receiving home deliveries once, 22% receive them twice, and 20% don't receive any home deliveries at all.



# 3.0 Current Travel Behaviours & Attitudes

Do they anticipate their online shopping to increase, decrease, or stay the same in the next year (%)



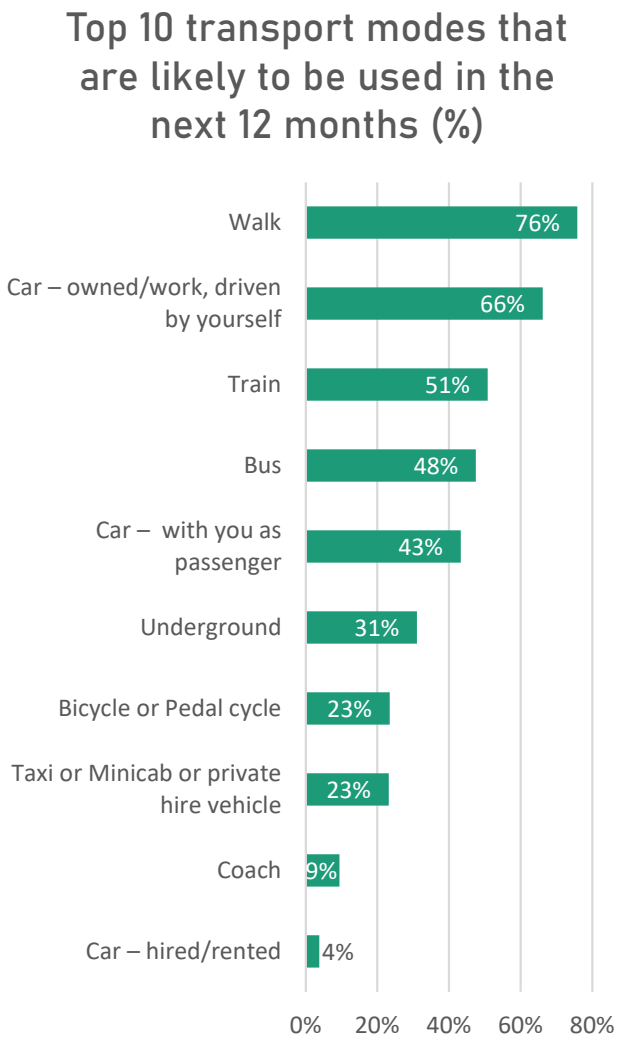

## Shopping

### Home delivery future behaviours

Most respondents (59%) foresee no change in their online shopping habits, including food purchases, over the next year. While 22% anticipate an increase. Of those expecting an increase in online shopping, 42% are aged between 30 and 49. People are keen to see opportunities to reduce carbon emissions and enable them to consolidate their deliveries into a single trip.

| | Pick up from a central location | Deliver on a day that saves carbon emissions | Deliver all items together rather than on separate trips |
|---|---|---|---|
| Option is currently offered | 81% | 40% | 65% |
| I would use it | 53% | 73% | 86% |

# 3.0 Current Travel Behaviours & Attitudes




## Future usage

### All transport modes

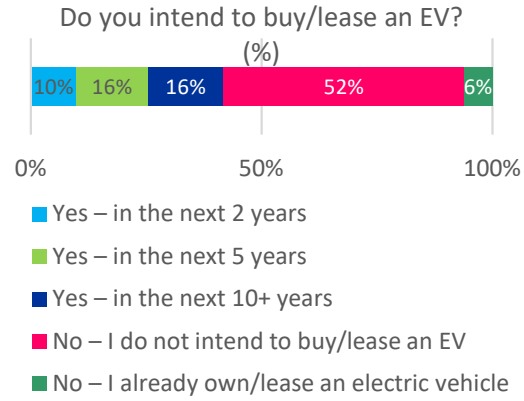
When asked about the modes of transport they are likely to use in the next 12 months, walking and driving remain the primary modes of travel in the Transport East region. Around half of the respondents are considering travelling by train and bus in the future. Currently, the use of coach and hired/rented cars is not common, however, people have expressed a likelihood of travelling by these modes in the next 12 months.

It is worth noting that those most expected to use the train and underground services earn £25k or more.

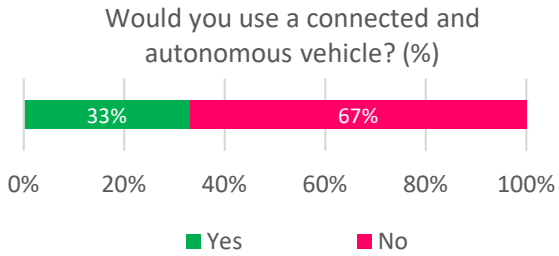
### Electric vehicle

Currently only 6% of respondents have an electric vehicle or plug-in hybrid. When asking to those who intend to continue using a car in the future, 42% expressed an intention to purchase or lease an electric vehicle in the next 2-10+ years.

Half indicated they do not intend to buy nor lease an electric vehicle in the future.




### Connected and autonomous vehicle




There is also apprehension regarding the use of autonomous vehicles. Only 1 in 3 of the respondents would consider using self-driving vehicles that combine connective and automated technologies, if available. Those more interested include people are younger than 49 years old or earning above £55k.

# 3.0 Current Travel Behaviours & Attitudes

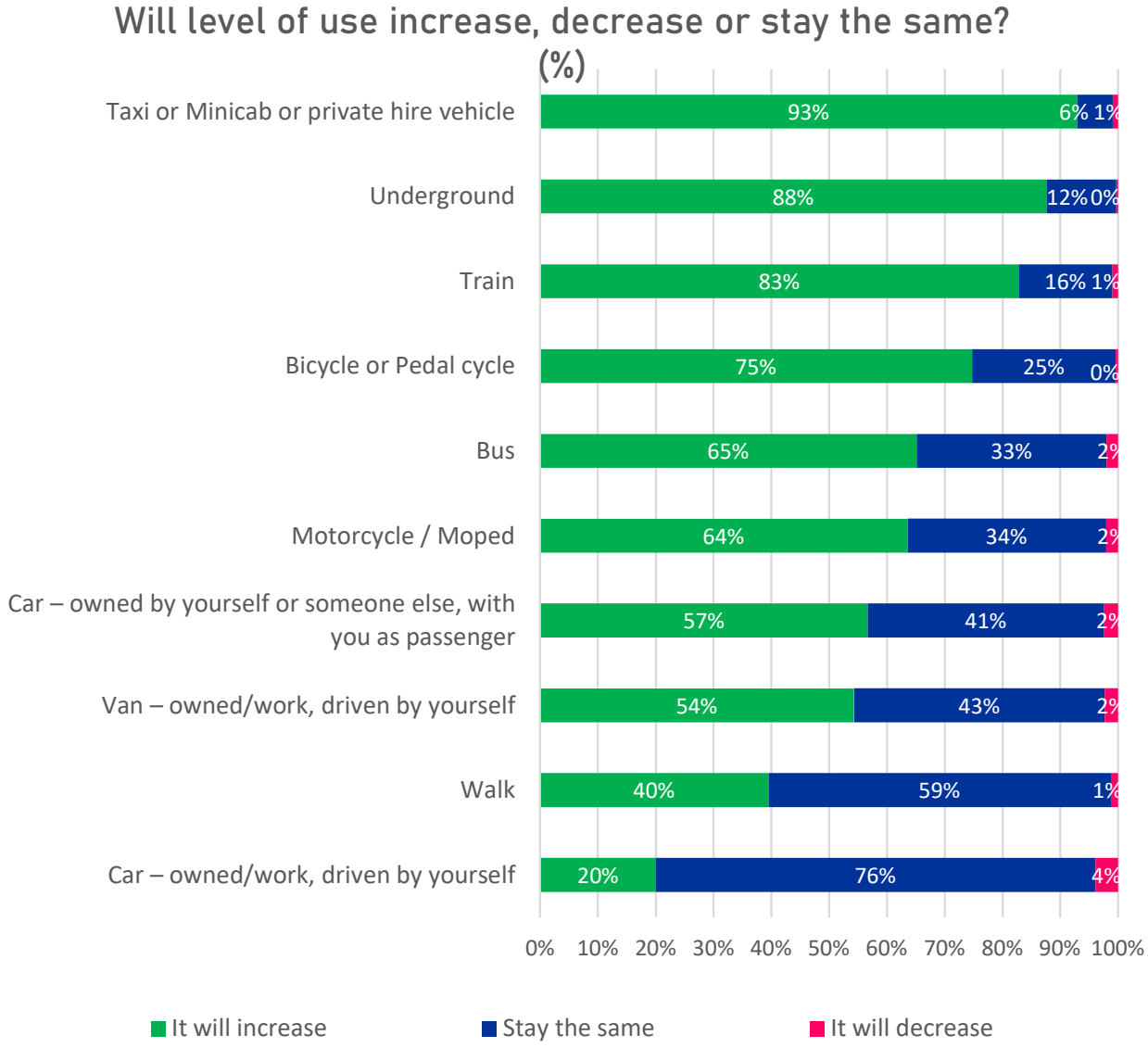
## Transport mode – level of use (current vs. future)

Respondents were asked whether they expected any changes in their use of transport modes over the next 12 months, indicating whether they plan to increase, maintain, or decrease their use of each mode.

Of the top 10 transport modes that people currently use in a typical week, approximately 90% of the taxi/minicab/private hire vehicle users claim they will increase their use. This view is shared across all demographics.

83% of people expect to increase their rail travel. Most notably, a higher proportion of women (86%), those aged 70+ (91%), and those in the under £25k income category (90%).

Very few expressed intentions to reduce their use of the transport modes listed. This indicates that these transport modes are likely to remain consistently used in the next 12 months.



# 4.0 Future Travel Behaviour and Choices:
## Barriers and decline in use

To further understand respondents' future travel behaviours, this section highlights the key barriers in their local area to using public transport (bus, train and Underground), walking and cycling and various forms of car use. Reasons for decreasing use of these transport modes in the future are also explored.

# 4.1 Barriers and decline in use

## Cycling

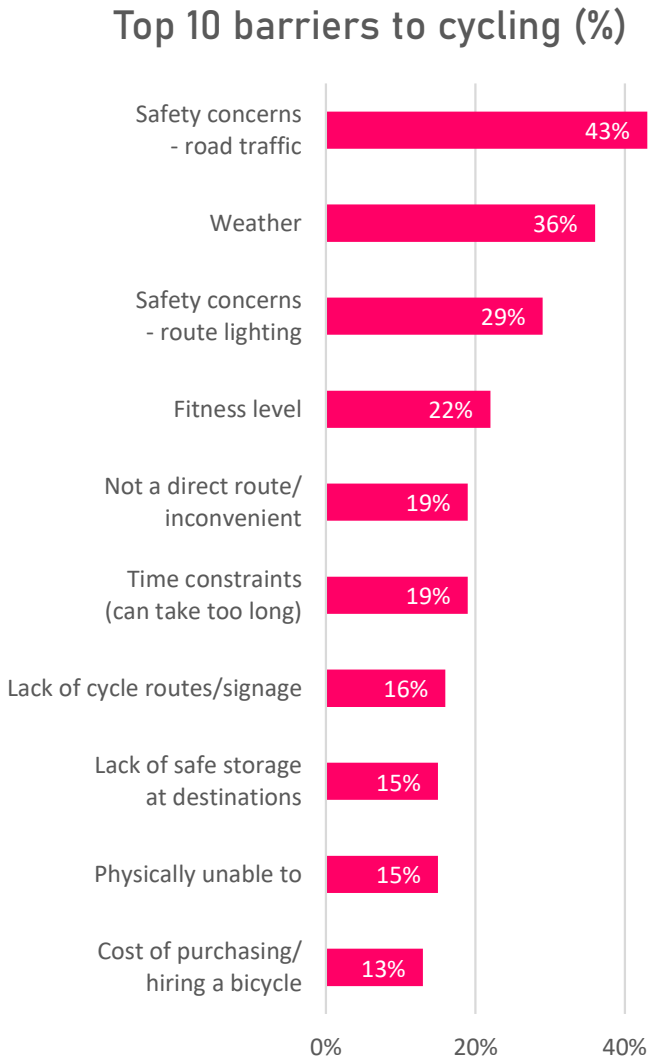
Safety concerns are a notable barrier to cycling. Key safety concerns are cycling alongside road traffic (43%) and the lighting provision along cycle routes (29%). Lighting was a particular concern for women (32%) and those in younger age groups (16-49 years).

Weather (36%) is the second biggest barrier overall, putting off over a third.

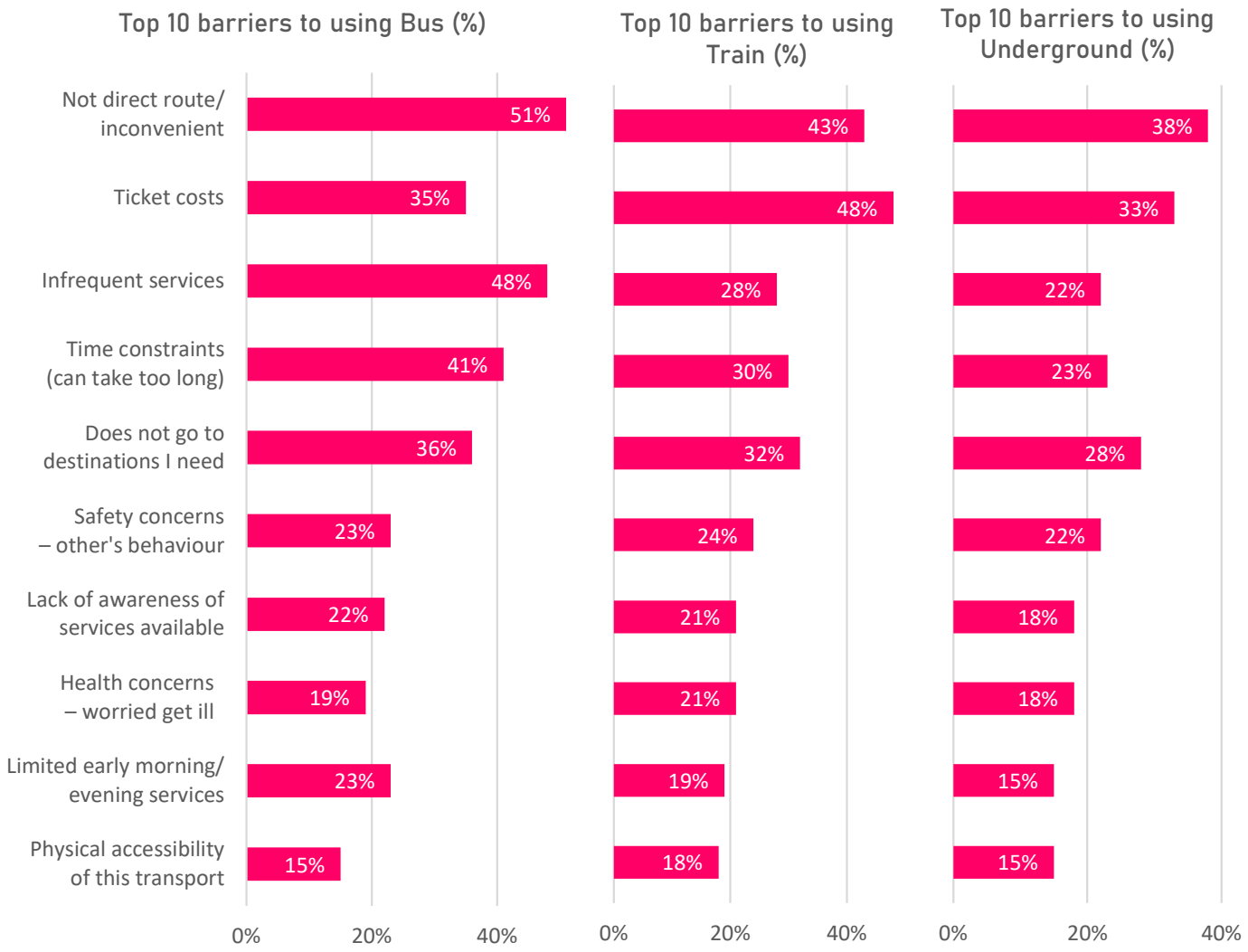
For 1 in 5, fitness (22%), non-direct routes (19%), and additional travel time (19%) contribute towards reasons for not cycling.

Safety concerns are also the main reason for the anticipated reduction in cycling: route lighting (33%) and road traffic (29%) also feature highly, suggesting improved lighting and reducing interaction with traffic could encourage more people to cycle more often.

Weather and time are also factors for reducing cycling, but personal fitness is not a top reason for cutting back on cycling levels.




# 4.1 Barriers and decline in use




## Public transport – barriers

The top barrier to using the bus or Underground is 'Not direct route/ inconvenient', and this is highest among those aged 50-69, with 60% citing it as a barrier for buses and 45% for the Underground.

'Frequency of service' and 'journey time' are both key barriers for bus use. These factors are less impactful for train or Underground use.

'The price of tickets' is the most notable barrier to train use (48%). A barrier that is less notable once earning £100k or more but is more prominent among those aged 70+.

Ticket price was also barrier for using the Underground and is a significantly high barrier among 16-29 year olds (41%).

Also,, safety concerns about others behaviour were significantly higher among 16–29 year-olds, across public transport modes, compared to among older age groups.

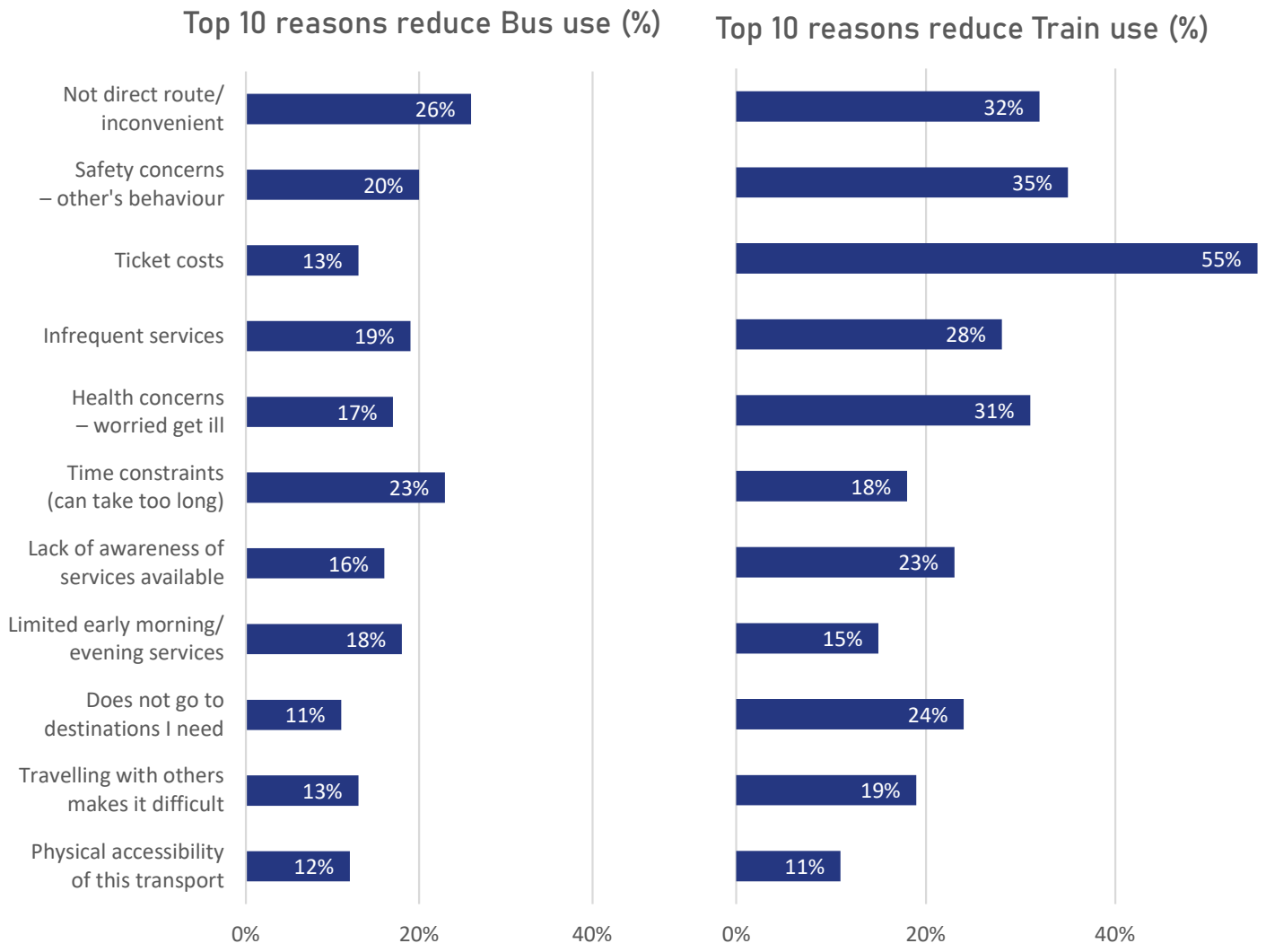
# 4.1 Barriers and decline in use

## Public transport – decline in use

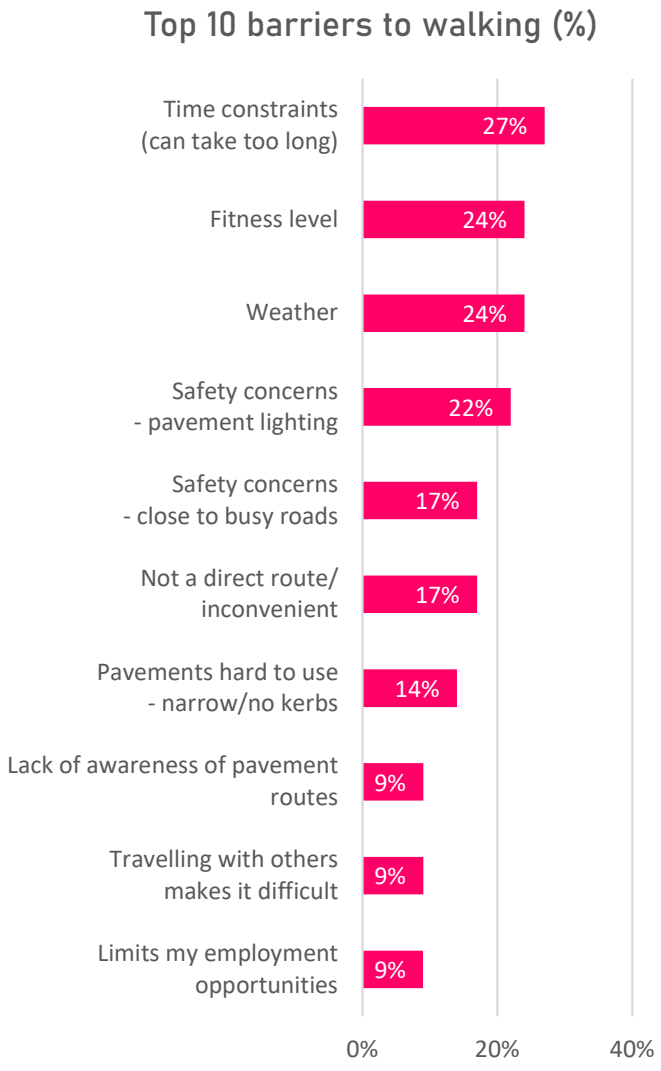
For both bus and train use there were a variety of factors driving anticipated reduction in future use.

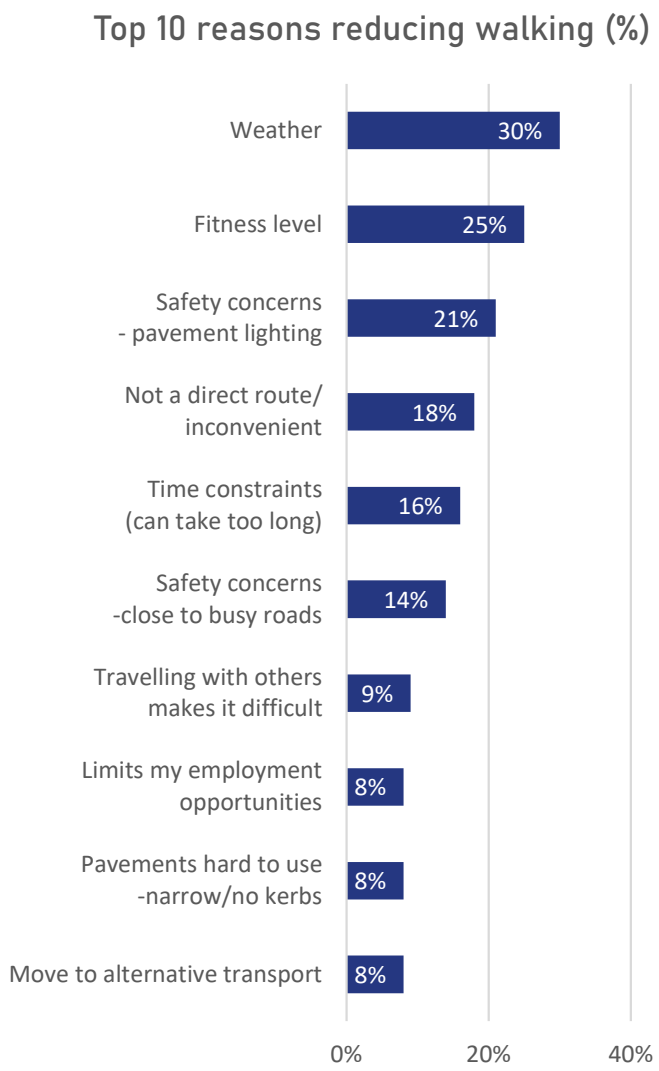
The top 3 mentions for reducing bus use, each given by one-fifth or more of those stating they planned to decrease their bus use, were: 'Not direct route/ inconvenient' (26%); 'Time constraints (can take too long)' (23%); and 'Safety concerns about others behaviour' (20%). Time constraints are more apparent for women than men, while for men the indirect route/inconvenience is the key barrier to bus use.

Among those saying they planned to use trains less often, the most common reason - cited by over half - was 'Ticket costs' (55%). 35% mentioned 'Safety concerns – other's behaviour' and 32% cited 'not direct route/ inconvenient'.



# 4.1 Barriers and decline in use




## Walking

'Time constraints' and 'Weather' are both key barriers to walking and these were rated highly across almost all demographic subgroups.

'Fitness level' (24%) is also a barrier, this is, however, significantly higher for those aged 70 years+ (51%) and considerably less for those under 50 years. 'Fitness' was also more likely to be a barrier for women (30%); those with a disability (38%) and those earning less than £25k (34%).

Safety is also a concern, in particular 'pavement lighting' (22%), and this was a significantly higher concern among: 30-49 year olds (31%).

For those reporting a likely decline in walking, 'weather' (30%) was the primary deterrent.

'Pavement lighting concerns' (21%) and 'fitness level' (25%) (again particularly high among 70 years+, 54%) were also remain notable as a reason for reducing walking.

# 4.1 Barriers and decline in use

## Car/motorcycle/van

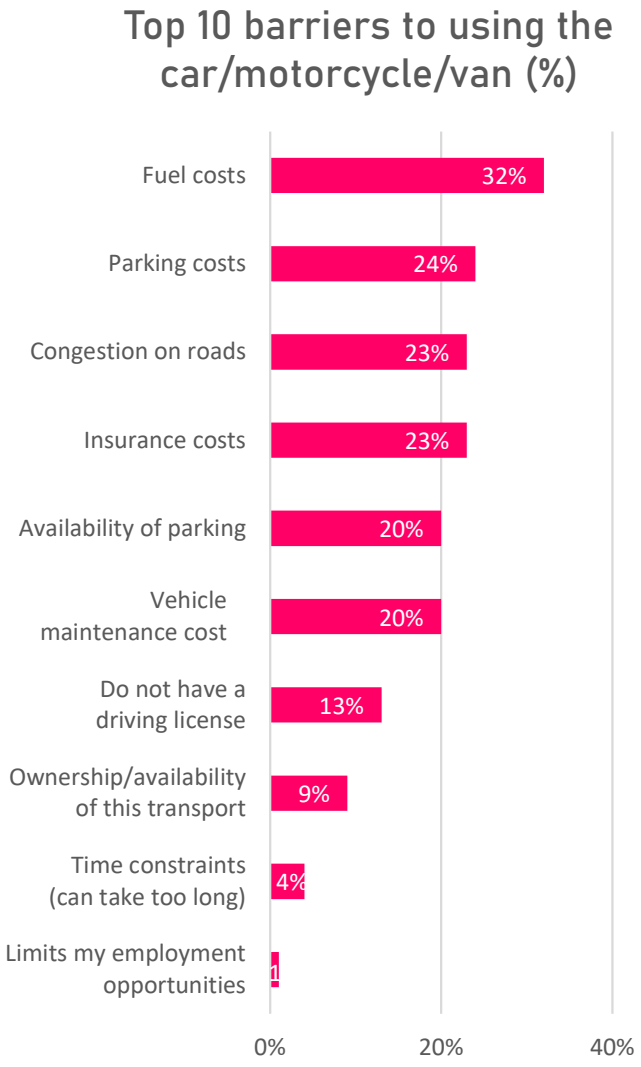
The cost of using a car/motorcycle/van rate highly in both barriers and reasons for potential reduction in use. Fuel cost is identified as the primary reason in both categories and particularly notable as the reason for reducing use.

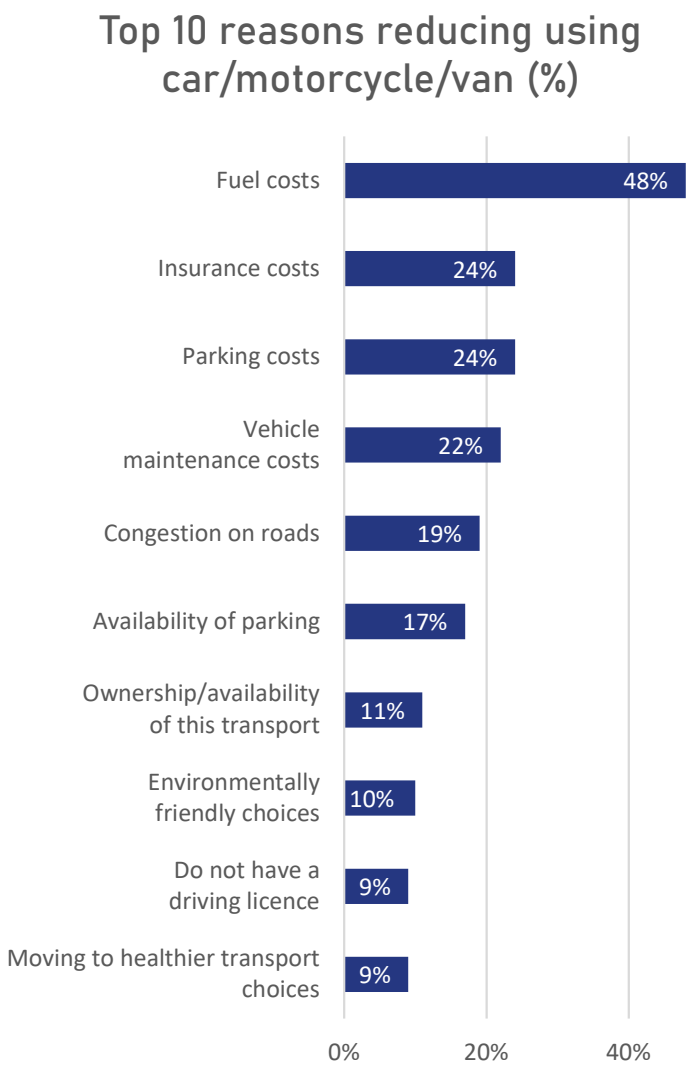
Fuel and vehicle maintenance costs were also significantly more likely to be a barrier for those aged under 50 years old than for older age groups. Insurance cost were also a significantly greater barrier among those aged under 30 years old.

Parking cost is a barrier across all subgroups.

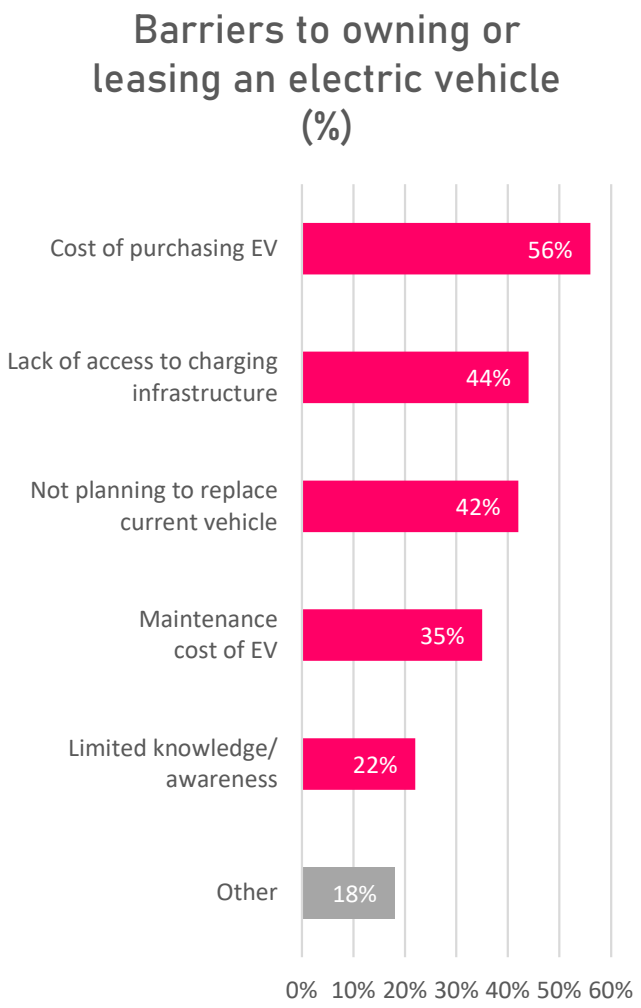
'Congestion on roads' and 'availability of parking' are also notable factors for both barriers and reasons for decline in use.

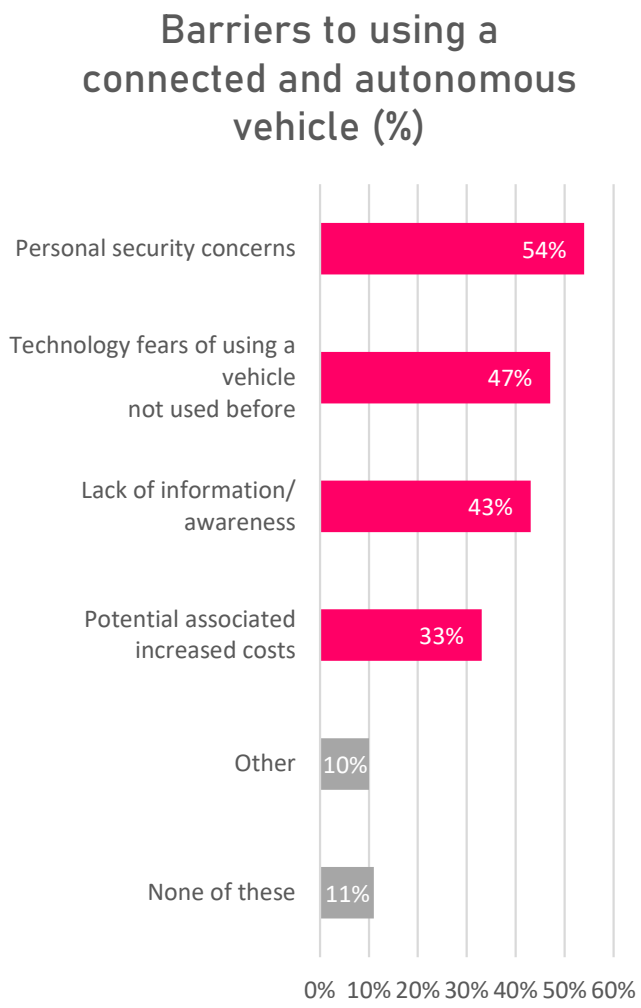
It is worth noting that moving to 'environmentally friendly choices' or 'healthier transport choices' are not a prominent reason for reducing car usage.



# 4.1 Barriers and decline in use




## Electric vehicle & connected and autonomous vehicle - barriers

### Electric vehicle

There are notable barriers to people moving to Electric Vehicles (EVs) with 'Cost of purchase' being a reason for over half of people not considering purchasing or leasing.

'Lack of access to charging infrastructure' and 'maintenance costs of EVs' are also notable barriers.

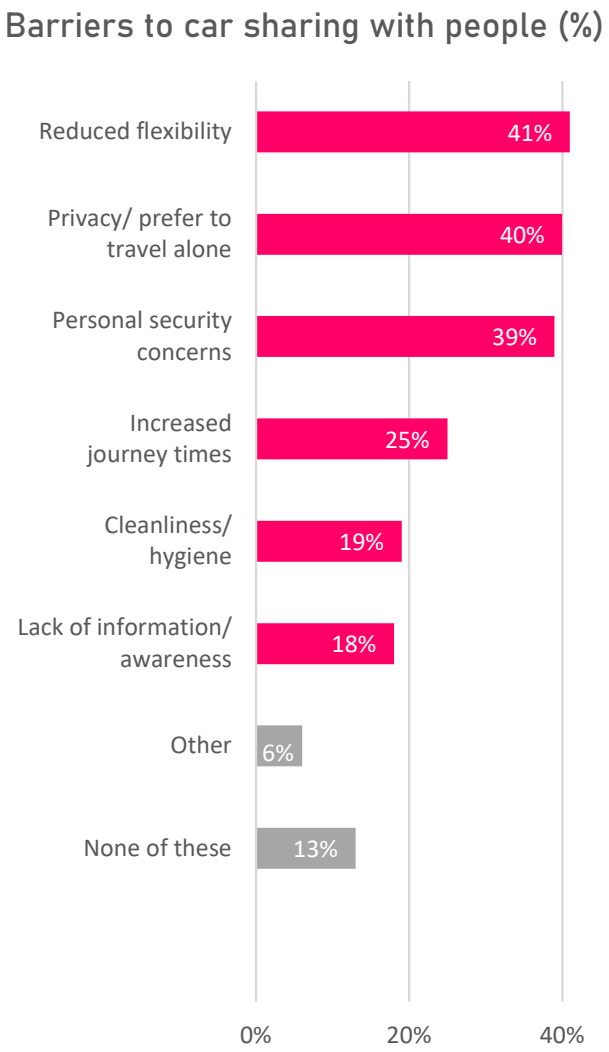
Limited knowledge/ awareness was a key barrier for people under 30 (48%) and more pronounced among for women (27%) compared to men (15%).

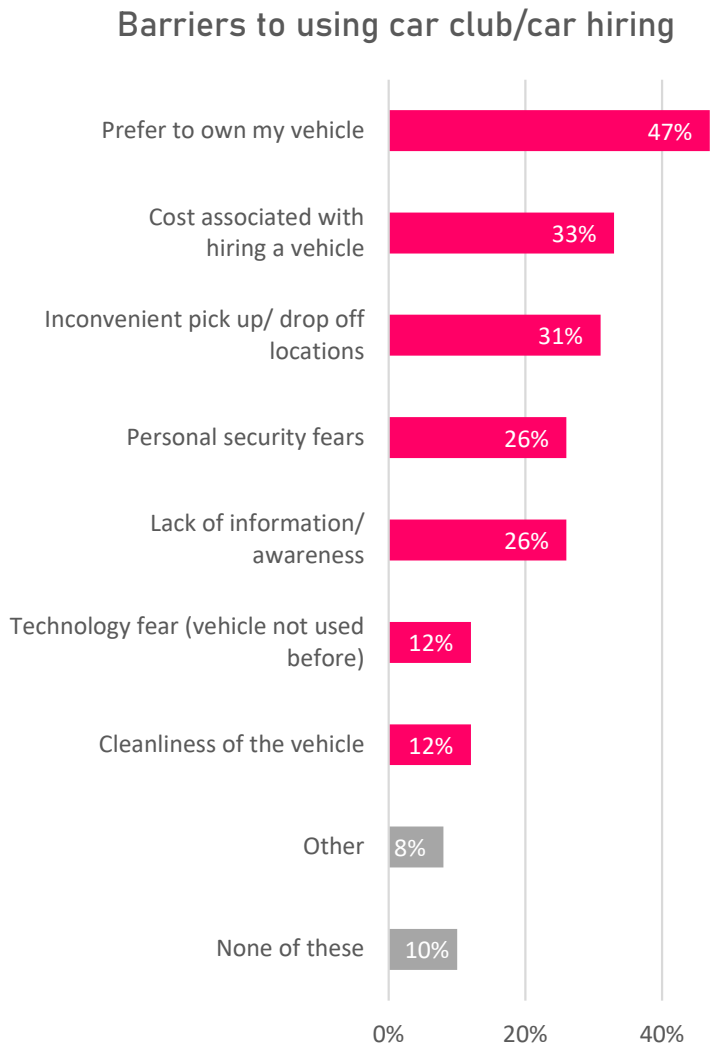
### Autonomous vehicle

Caution around personal security and unfamiliar technology were, overall, bigger barriers for autonomous vehicle use than costs. Although technology related fears were notably lower among under 30's (37%).

Lack of information/awareness was a more pronounced barrier among women (50%) compared to men (34%), and more notable among younger groups. Mentions within 'other' included safety and trust concerns.

# 4.1 Barriers and decline in use




## Car share / car club[1] - barriers

'Reduced flexibility', 'Privacy/prefer to travel alone' and 'Personal security concerns, are all key barriers to car sharing with other people.

Personal security is a significant concern for women (44%) and those under 50 years old (16-29 years, 47%), (30-49 years, 46%).

'Increased journey times' is also a notable barrier and significantly more likely to be a barrier for those aged under 50 years old (16-29 years, 33%), (30-49 years, 30%) compared to older age groups.

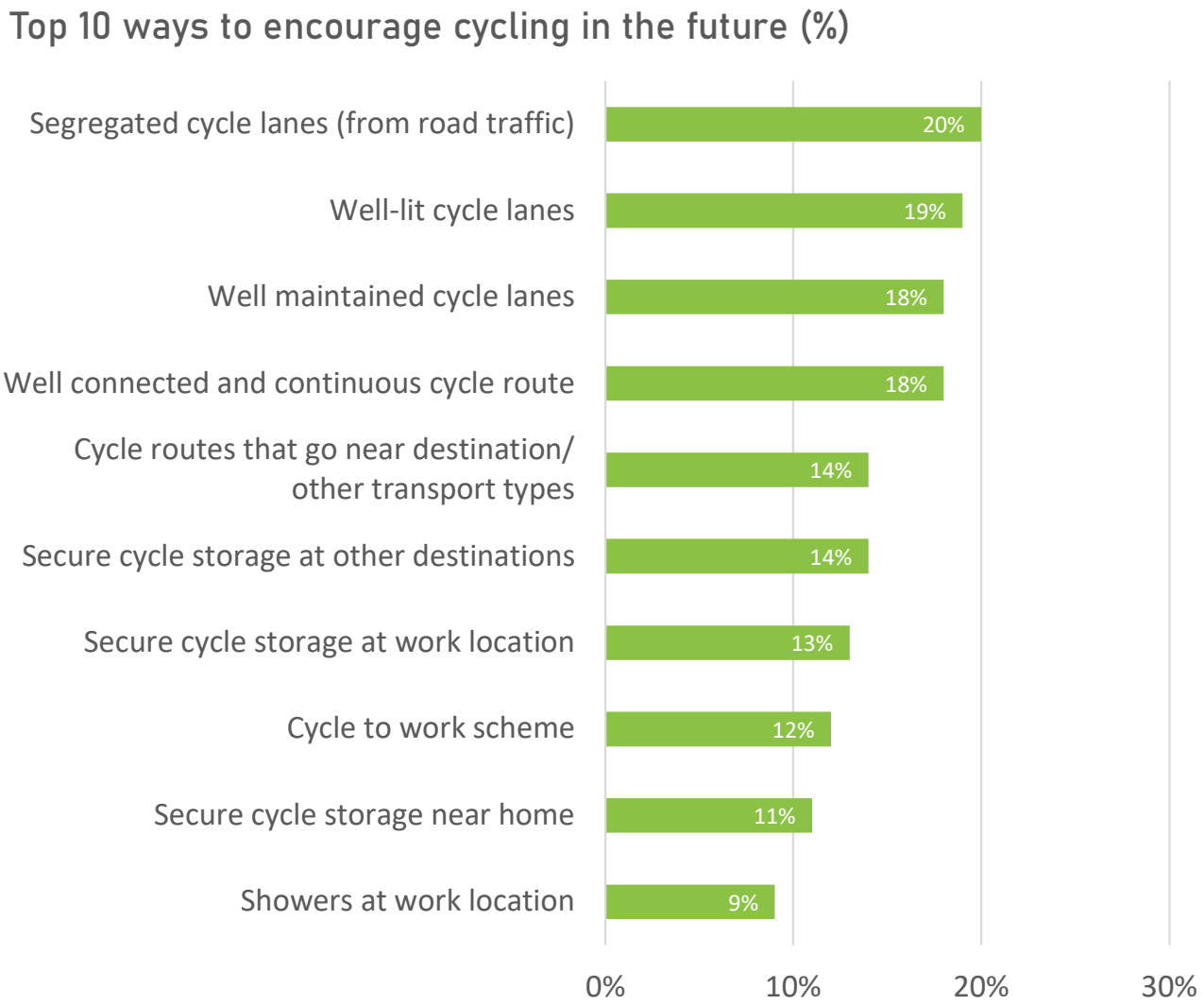
'Preferring to own my vehicle' is a primary barrier to car club/hiring across subgroups except for those aged under 30 years old (32%) – for this group 'personal security fears' (43%) is the primary barrier.

Costs of hiring a vehicle are also a notable barrier and 'inconvenient locations' are particularly a barrier for those aged over 50 and those on higher salaries.

[1] *Car clubs provide access to vehicles without ownership, offering short-term rentals to residents, visitors or businesses, typical by the hour.*

# 5.0 Future Travel Behaviour and Choices:
## Encouraging Future Use

# 5.0 Encouraging Future Use




## Cycling

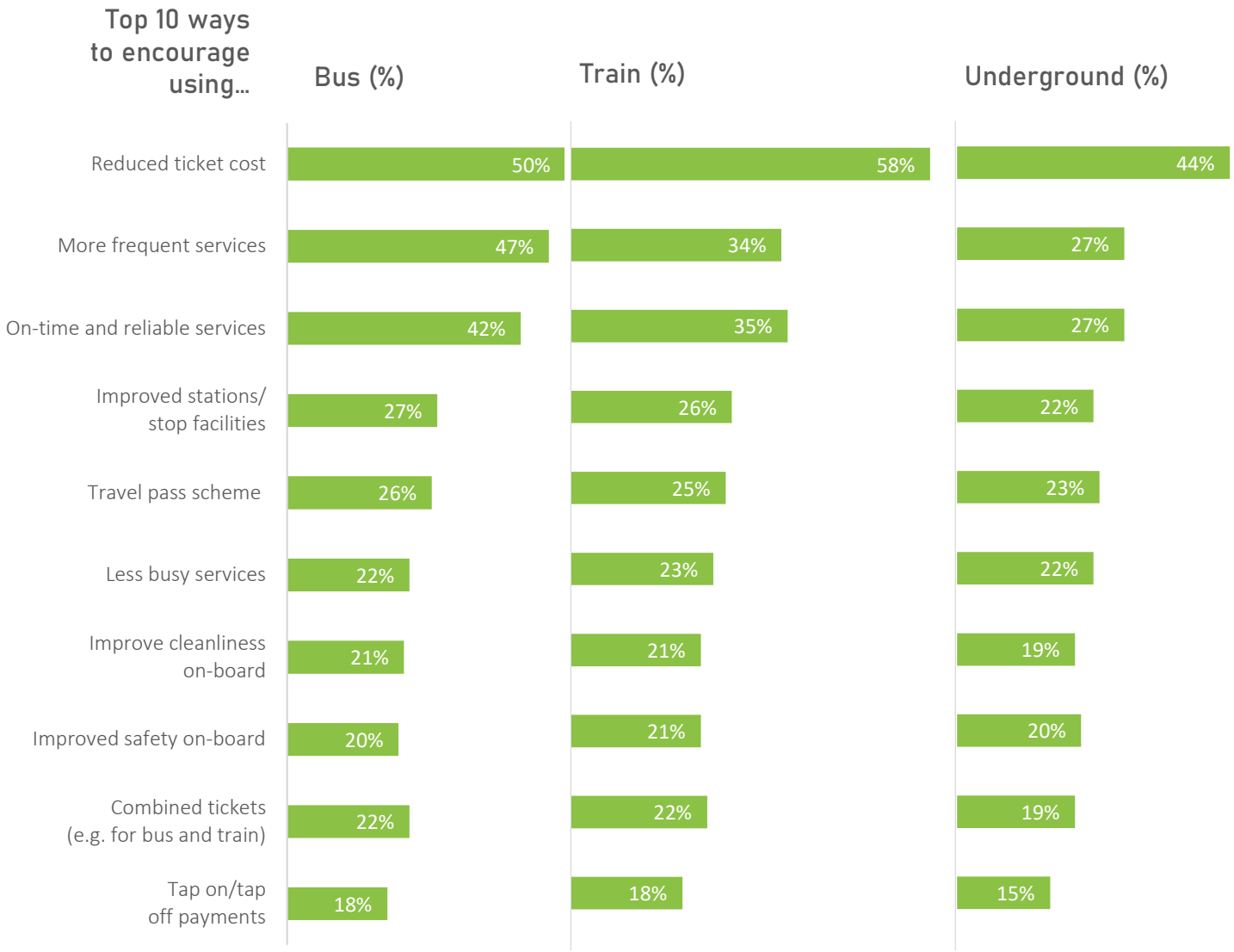
Respondents were asked about measures that would encourage them to cycle in the future. Responses showed it was harder to encourage cycling uptake as respondents got older as fewer options would help to encourage travel. While a higher salary bracket increased the number of items that would encourage a respondent to cycle more in the future.

Indicators of good quality cycle routes were rated highly as factors to encourage cycling. Cycle lanes segregated from road traffic (20%) came top, closely followed by well-lit (19%) and well-maintained cycle lanes (18%), and well-connected and continuous cycle route (18%).

Cycle to work schemes were particularly appealing to under 30's (25%) and those earning £100k+ (20%).

For those under 30 years old, cycle storage at work (25%) and near home (22%) are also important factors.

# 5.0 Encouraging Future Use




## Public transport

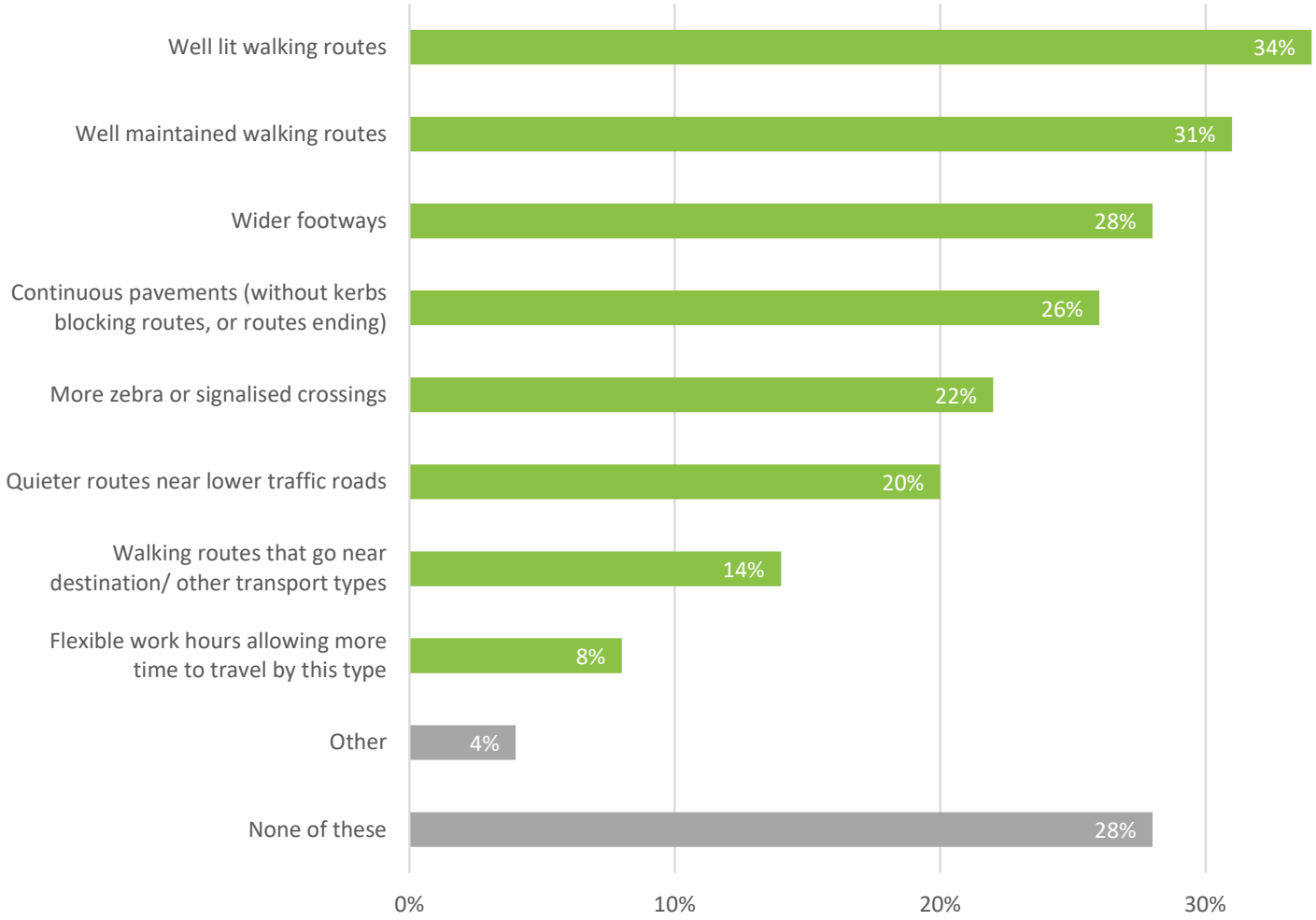
'Reduced ticket cost' is the standout mention for encouraging future use across public transport modes. The exception to this is for bus use among those aged 70+, reflecting access to concessionary passes.

'More frequent services' and providing 'on-time and reliable services' – also rated highly, with these factors being particularly importance for encouraging future bus use.

There are a variety of secondary factors that would encourage future use. Among those aged 16-29 years old a 'travel pass scheme' had significant appeal, particularly for buses, and this group were also the most likely to report that 'improved station facilities' and 'less busy services' would encourage them.

# 5.0 Encouraging Future Use

## Ways to encourage walking in the future (%)




## Walking

'Well-lit walking routes' was the top mention for encouraging walking in the future (34%), especially among women (40%) and LGBTQ+ people (45%), suggesting safety is a key concern for these groups.

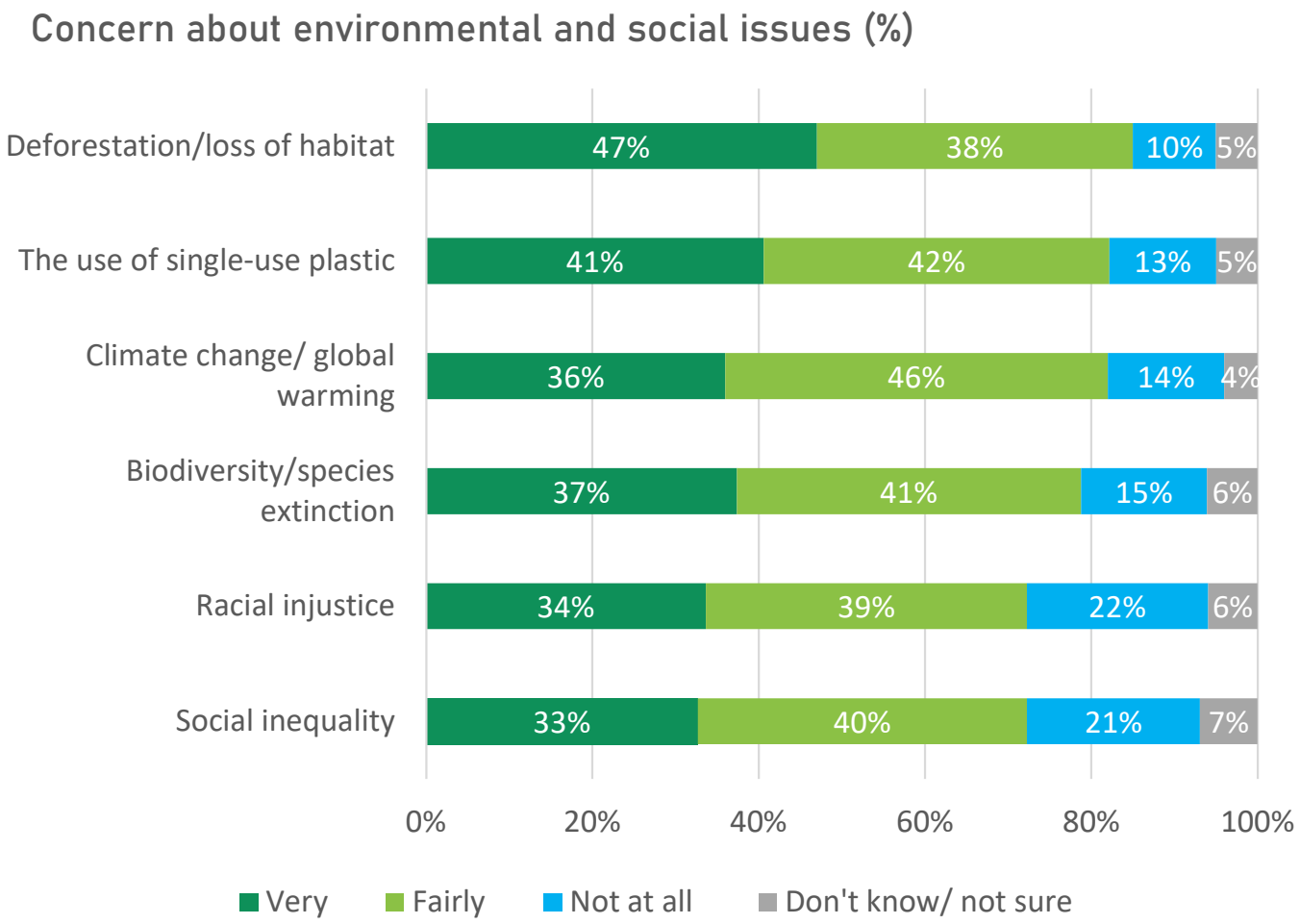
'Well-maintained walking routes' was also a notable factor, particularly for those aged 50+.

'Wider footways' and 'continuous pavements', were additional factors that could help encourage walking in the future.

For those earning £100k+, flexible work hours play a greater part on the ability to walk more than for other groups (14%).

Notably, 39% of those aged 50+ reported that none of these factors would encourage them to walk, compared to only 17% of those aged 16-49, suggesting that improvements in walking infrastructure may be more effective for younger people.

# 5.0 Encouraging Future Use




## Attitudes to environmental and social issues

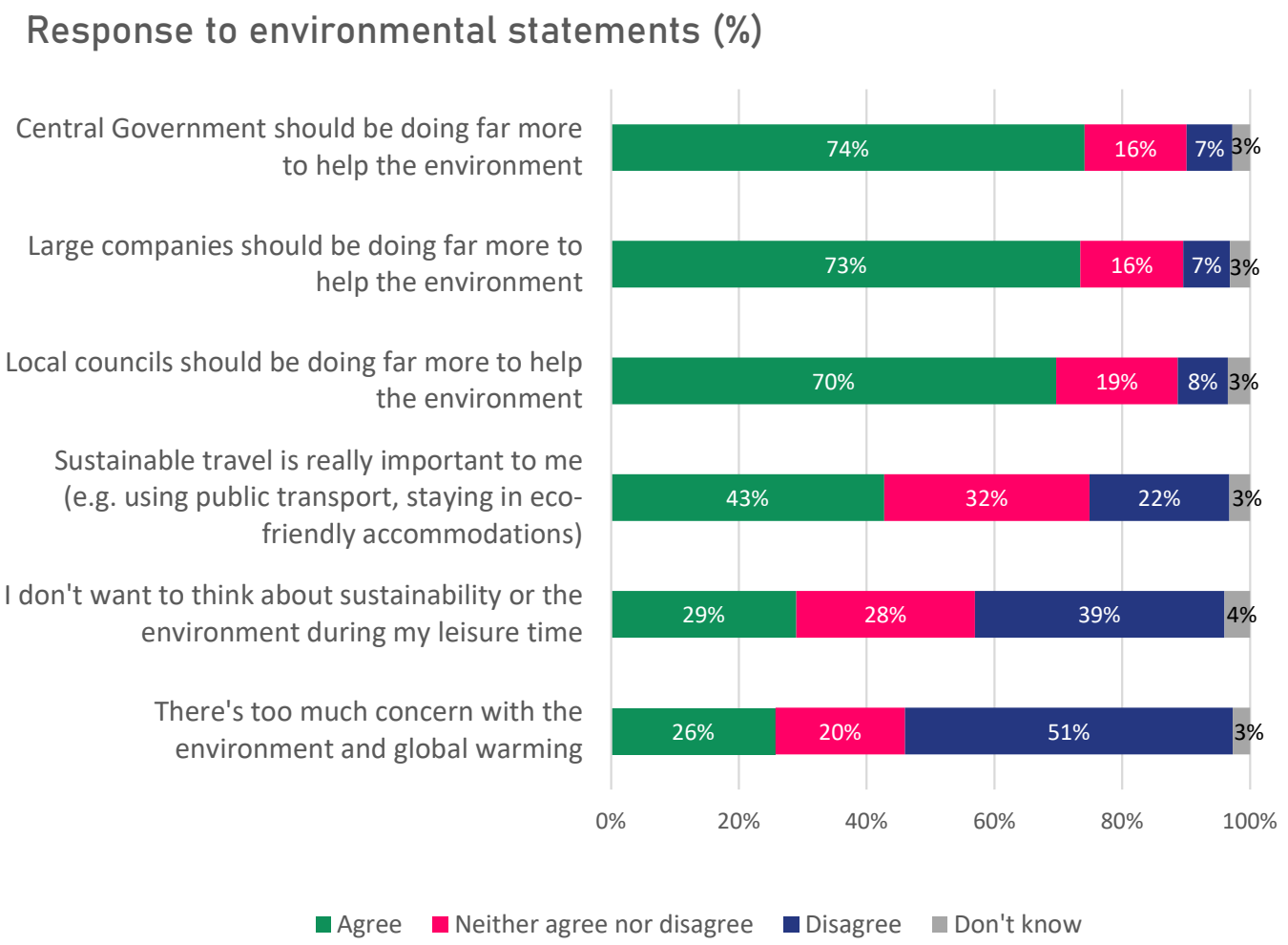
Concern about global and societal issues overall is high.

Levels of concern for environmental issues rank slightly higher than for social issues. This is most apparent among those aged 50 and above. This group is 'very concerned' by 'Deforestation/loss of habitat' (57%) and 'the use of single-use plastic' (61%).

Social issues are more important to some groups, where they are 'very concerned' by 'racial injustice' and 'social inequality' – particularly those aged 16-29, LGBTQ+, those with a disability, and women. They rate social issues as having equal concern as environmental issues.

Among the 6% of respondents who use an EV/plug-in hybrid, the level of concern about climate change is similar to those using conventionally fuelled vehicles, suggesting that environmental benefits are not the only motivator.

# 5.0 Encouraging Future Use




## Attitudes to the environment

43% of respondents agreed with the statement 'sustainable travel is really important to me'. This view is more prominent among 16-49 year olds, and among those with an income of £100k or more. While those travelling by car rated this lower (39%), those owning an EV/plug-in hybrid agreed this was more important to them (56%).

There was also significant agreement that central government, large companies and local councils should all 'be doing far more to help the environment'. This viewpoint was stronger among women and those aged 30-49 years old.

There was, however, a notable minority (26%) who agree that 'there's too much concern with the environment and global warming', and 29% who agreed they prefer not to 'think about sustainability or the environment' during their leisure time. This was more likely to be reported by men than women.

# 5.0 Encouraging Future Use

## Attitudes to the environment

**68%**

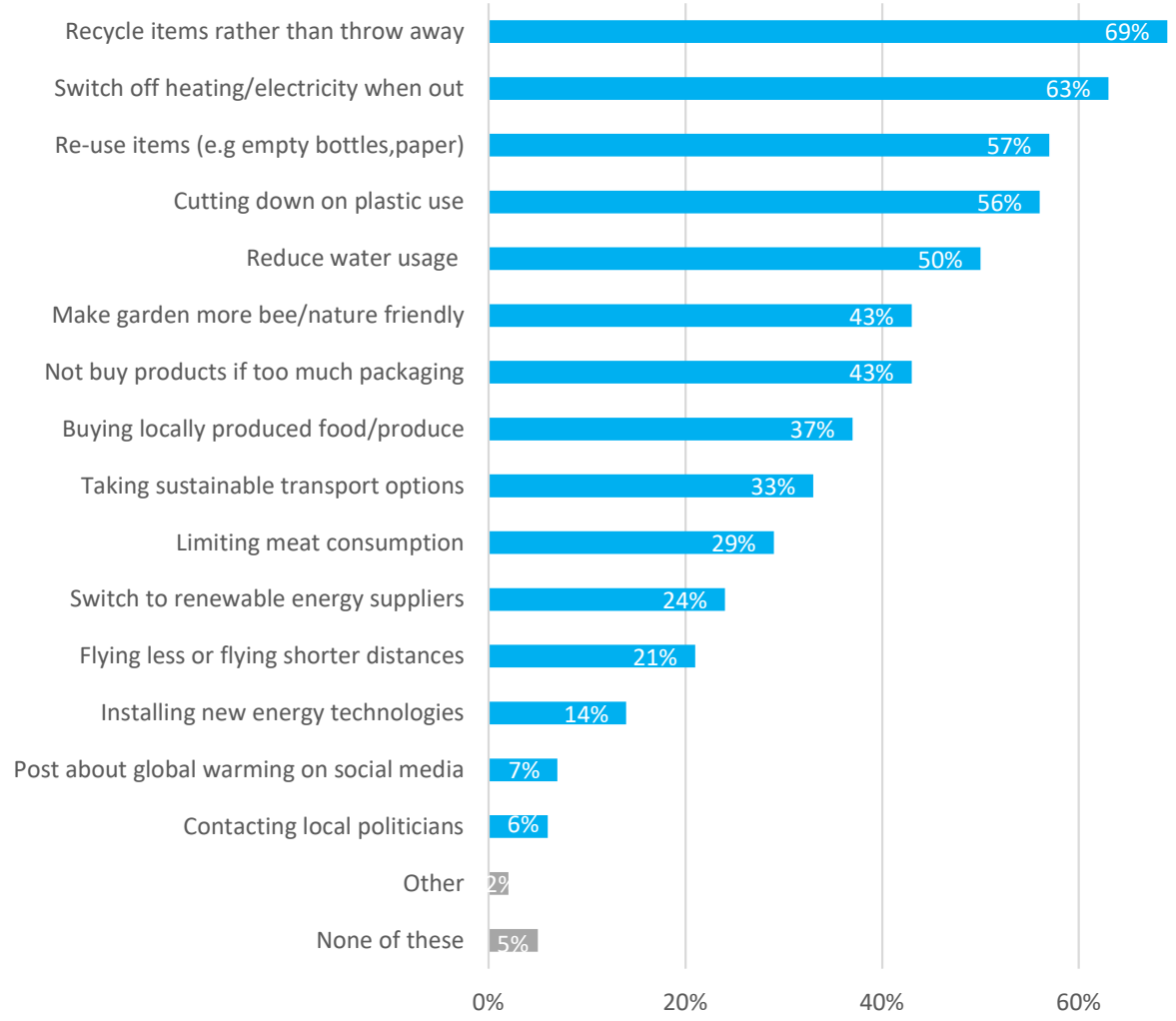
**state it is very/somewhat important to make sustainable choices when travelling (e.g. using public transport, like walking or cycling)**

More women than men, and more respondents aged 50 years+ than 16-49 year olds do more of the listed activities to help the environment.

That said, when it comes to 'taking sustainable transport options' the variations between demographic subgroups are less notable, slightly fewer 16-29 year olds (27%) and slightly more 50-69 year olds (38%) report doing this. In general, around 1 in 3 people report that they currently take sustainable transport options, in line with the proportion using public transport options currently in a typical week (31%).

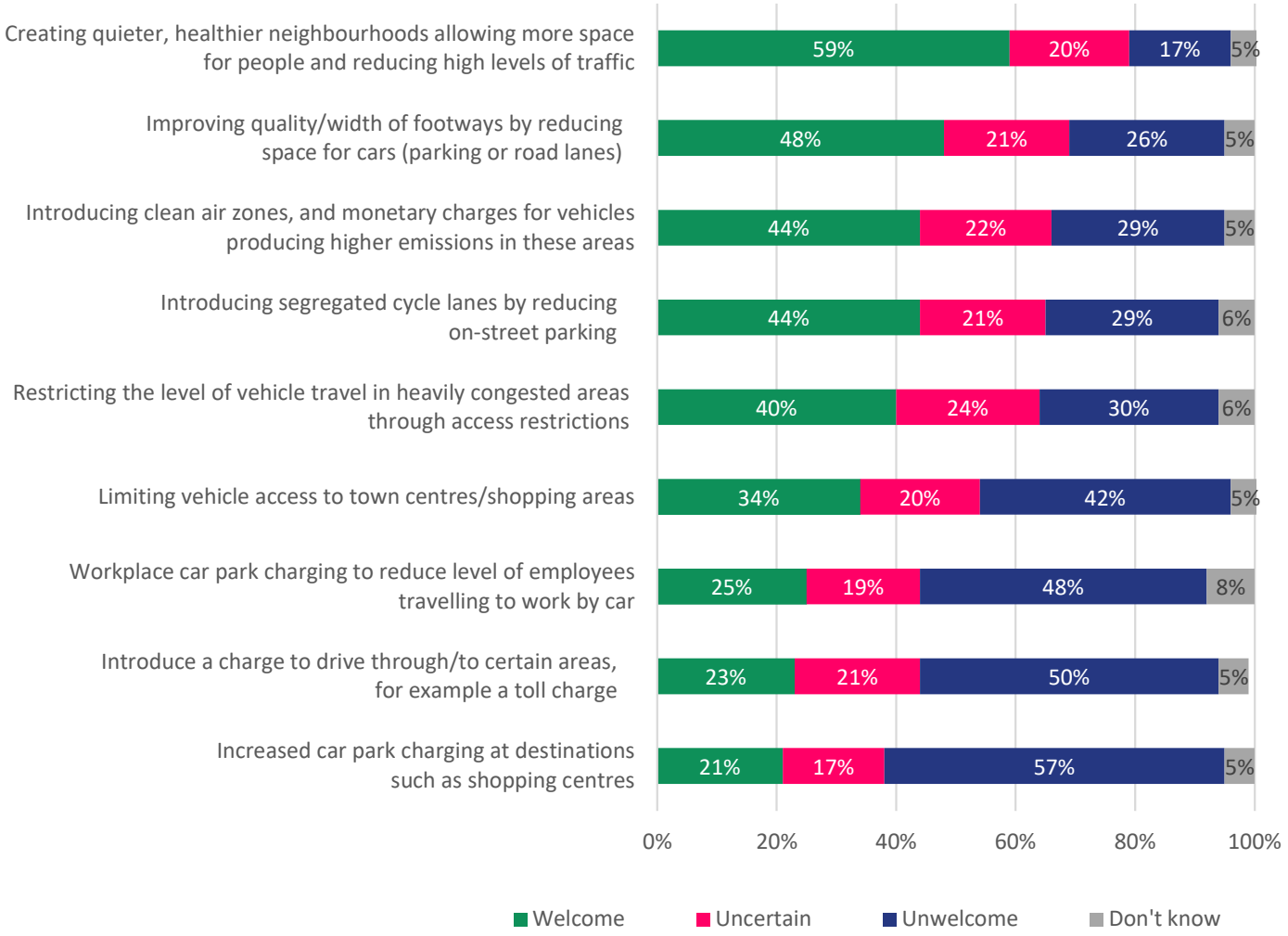
As around two thirds of respondents feel it is important to 'make sustainable choices when travelling' it suggests an opportunity to increase sustainable transport behaviours.

### Personal behaviours carried out to help the environment (%)



# 5.0 Encouraging Future Use

## How welcome are the following scenarios? (%)




## Attitudes to the environment

### Views on suggested scenarios to reduce environmental impact

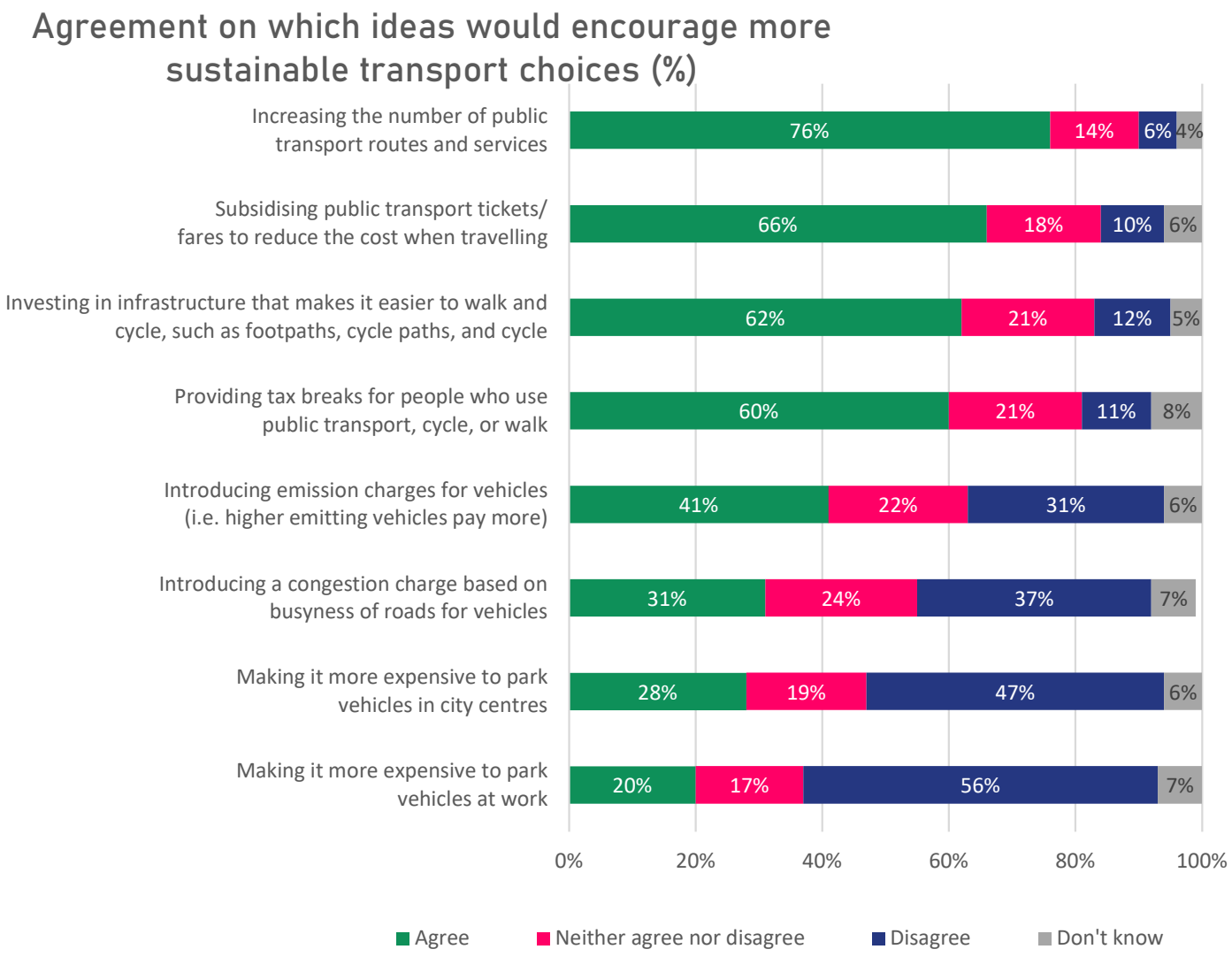
Scenarios that improve the environment for walking and/or cycling were more likely to be welcomed than not. This includes more room for people and bikes and reducing the space available to vehicles or creating a charged clean air zone.

Schemes which restrict access to certain areas received the most polarised responses, particularly among car users. Scenarios which involved charging for access were the least welcomed. Yet, those earning over £100k, those younger than 50 or owning an EV/plug-in hybrid were more welcoming of the idea of introducing charges.

*"Creating quieter, healthier neighbourhoods allowing more space for people and reducing high levels of traffic"* was the **most welcomed scenario.**

*"Increased car park charging at destinations such as shopping centres"* was the **least welcomed scenario**

# 5.0 Encouraging Future Use




## Attitudes to the environment

### Views on suggested scenarios to encourage sustainable transport choices

76% of respondents agreed that "increasing the number of public transport routes and services" would encourage more sustainable transport choices. Also, investing in infrastructure that makes it easier to walk and cycle would benefit too.

Financial incentives such as subsidising/reducing fares and/or tax breaks for those travelling sustainably were also seen as encouraging sustainable travel – an enticing factor for those on an income of £25k+.

However, initiatives that financially penalised people, through new charges, were less likely to be considered as having a positive impact.

Those aged 16-29 were less in agreement to other groups. Fewer were in support of investments or increasing services, and a comparably higher number were more likely to support congestion charges for busy areas (37%) and making it more expensive to park in the city (28%) compared to other age groups.

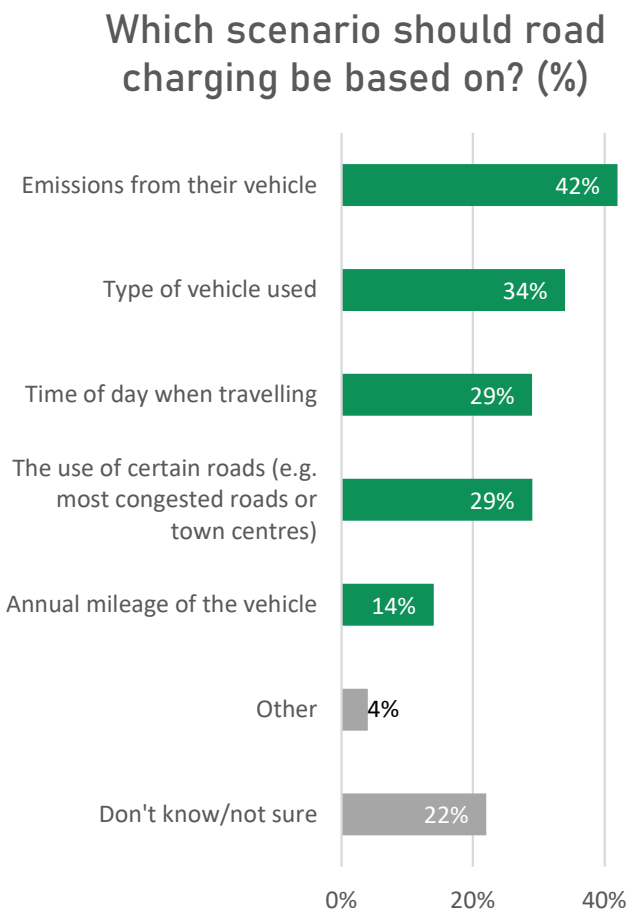
# 5.0 Encouraging Future Use

## Scenarios for future investment – road charging

42% of respondents said they thought 'emissions from their vehicles' should be the basis for a future road charging scenario. However, this was significantly lower among those earning under £25k (36%) and significantly higher among those earning over £100k (52%) or owning an EV/plug-in hybrid (63%) where the impact to them is likely to be limited.

'Type of vehicle used'; 'Time of day when travelling' and 'The use of certain roads (e.g. most congested roads or town centres)'; were also suggested as possible options by notable proportions.

'Annual mileage' (14%) was the least popular of the scenarios put forward.




"Imagine a scenario where road charging has been introduced (charging certain vehicles to access certain roads at certain times of the day and/or week) in the area. The money from the road charging will be used to support funding Government initiatives in the local area. In this scenario, which of the following should the road charging be based upon?"

# 5.0 Encouraging Future Use

## Scenarios for future investment – top priorities for funding

| Top 5 priorities ranked in top 3 (%)* | |
|---|---|
| Improving condition of roads (e.g. filling pot holes) | 57% |
| Increasing number of available public transport services (e.g. bus, train) | 51% |
| Subsidised ticket cost for local bus services | 42% |
| Improving footway quality | 42% |
| Improving the number and quality of cycleways (e.g. increase the number of segregated cycleways) | 20% |

* We asked people to rank statements in order of priority. The above table reflects the statements that appeared most frequently in respondents top three

Improvements with the broadest benefits came out top on this priority ranking exercise. Ranking in their top 2 priorities for over half of respondents were:

- Improving condition of road (57%)
- Increasing number of available public transport services (51%)

These were backed most by those aged 50 or above, with 71% of those aged 70+ seeking an improvement in the condition of the roads.

Investment in less broadly beneficial projects were not as likely to rank in respondents top 3 priorities (e.g. increasing EV charging points).

Respondents jointly disagreed with the statement that new transport funds should go 'not directly to transport, but towards increasing general funding for local councils'.

'Specific named transport improvement projects' was ranked second from the bottom – with those aged 50+, car users and incomes of £25k or less ranking it lower than other groups.

**"Imagine your local authority has raised additional funds to invest in transport in your area. Please rank the following in terms of which you would consider to be the top 5 priorities for funding in the area that you live in?"**

# 5.0 Encouraging Future Use

## Scenarios for future investment – top fairest ways of addressing the funding gap

| Top 5 items ranked in top 3 (%) | |
|---|---|
| Implement a road user charge Based on size and weight of vehicle | 35% |
| Implement a road user charge based on vehicle emission level | 34% |
| Increase taxes on other types of vehicles, such as electric vehicles and hybrid vehicles | 32% |
| Allocate a portion of existing tax revenue to be used for transport infrastructure | 29% |
| Apply a local tax to those visiting the country or area | 20% |

Implementing road user charges based on 'size and weight of vehicle' (35%) or 'vehicle emission level' (34%) were the top mentions for fairest ways to address the funding gap.

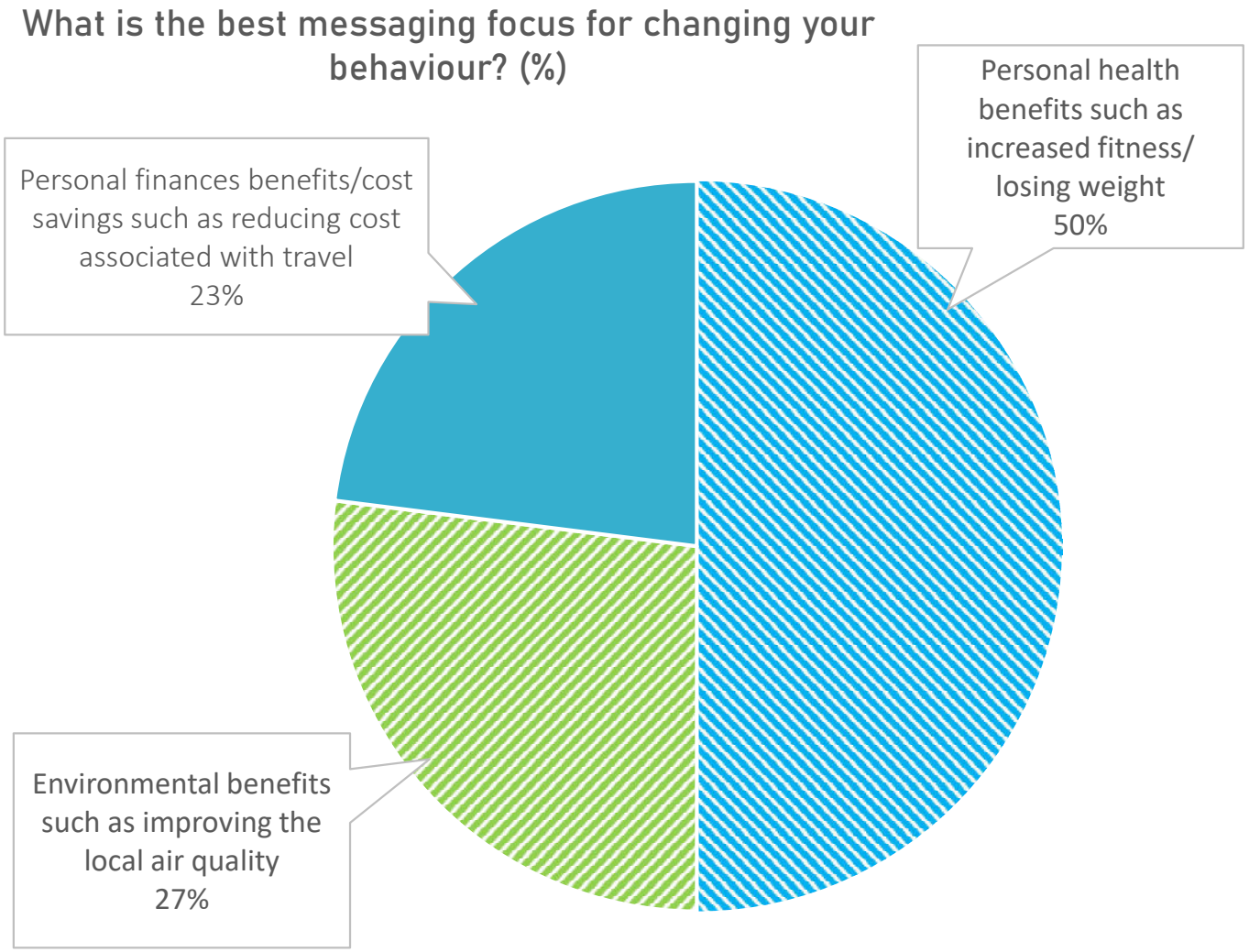
Charging based on size of vehicle was supported more by men, those aged 70+, or earning more than £25k. Those earning £100k+ or using an EV/plug-in hybrid were more in favour of being based on emissions.

Increasing taxes on other types of vehicles (e.g. EV or hybrid) (32%) and allocating a portion of existing tax revenue (29%) were highly rated, although less so by those aged 16-29, and those owning an EV/plug-in hybrid were not in favour of taxes on EV/hybrids.

Options that affected users and non-user equally were less supported. Increasing income tax/fees or paying additional council tax were viewed less favourably. Reducing Government spending on transport was the least likely of the scenarios to be ranked in respondents top 3.

"Currently the tax you pay when buying fuel goes primarily towards funding transport infrastructure, government funding, and towards environmental initiatives.
As reliance on petrol and diesel vehicles decreases, the transport infrastructure traditionally funded by these fuel taxes will need to be addressed. Please rank the following on which you believe would be the top 5 fairest ways of addressing this funding gap?

# 5.0 Encouraging Future Use




"Imagine you're looking to incorporate more cycling or walking into your daily routine. Your local area wants to encourage residents to get moving, but with so many options available, they need your input. Three different campaigns have been launched, each with a unique message. Which one would most inspire you to choose your bike or to walk over the car for everyday activities?"

# 5.0 Encouraging Future Use

## Personal health benefits

50% of respondents feel health-related information is the best way of encouraging them to cycle or walk for their everyday activities. A key reason was because it resonated personally, which was reflected across all key demographics. Disabled people rated this slightly lower, with 44% rating this message as effective.

Health is important at an individual level and improving health was often something respondents were already trying to do or inspired to. This message has the potential to prompt and reinforce these behaviours/aspirations. This message provided the most tangible benefits for individuals.

Weight loss was a specific benefit for some, though the wider health benefits were often considered as important and included both mental and physical health.

The opportunity to include exercise into 'travelling' is also noted (saving time/ money). In terms of wider social benefits, the NHS was named several times as a potential beneficiary to encourage behaviour change.

When promoting walking and cycling it should be considered that these modes may not be appropriate for every journey or for everyone – due to infrastructure, existing health conditions or age.

# 5.0 Encouraging Future Use

## Environmental benefits

27% are most inspired by environmental messaging.

Unlike the other two messages, which focus on a personal benefit, this message can appeal for the opposite reason – offering a wider, communal benefit. Additionally, this message was considered to have broader appeal as it was not limited by personal circumstances around health or wealth.

This message is also effective when it aligns with individuals' existing attitudes towards the environment and current lifestyle choices around being environmentally conscious. For example, EV/plug-in hybrid users were more likely to select this option. A further consideration was around the impact for future generations, tackling climate change and helping the planet.

A notable proportion recognised the associated benefits for health through improved air quality and there was a feeling there could be a positive cycle of reinforcement - cleaner air; more pleasant environments; increased likelihood to walk/cycle; health benefits.

The associated potential for community wide health benefits were (again) recognised as a wider benefit for the NHS too.

# 5.0 Encouraging Future Use

## Personal financial benefits/ cost savings

Among the 23% who said they would be most inspired by this message; a key reason was they would personally see an immediate benefit.

Being aged 34-49 increased the likelihood of selecting this message (26%), whereas those older (aged 70+; 18%) or earning £100k or more (13%) were less likely to think this focus would encourage them to change behaviour.

The 'cost-of-living crisis' was a significant factor which often magnified the perceived benefits of a financial saving.

Several in this group also identified that they were, in general, motivated by money (and felt others were too) and an opportunity to save money strongly appealed.

A further factor for some was that, in comparison, the other messages were not strong enough to compete with the financial reward messaging.

# 6.0 Conclusions and Opportunities

# 6.0 Conclusions and Opportunities

## Key takeaways of travel behaviours and attitudes

- Of those surveyed, at the time of asking, 'car' (63%) and 'walking' (64%) were the most used modes of transport across all journey purposes. Lower-income households (under £25k)and younger (16-29) and older (70+) people are more likely to use the bus. Rail travel is more prevalent among 16-49 year-olds, and used most often to travel to work. Cycling is more limited, with 9% travelling this way.
- People choose transport based on convenience, journey time and how well it fits their needs. Environmental reasons are one of the main reasons for choosing to walk or cycle.
- The most common trips include journeys for grocery/food shopping and commuting to work, which closely aligns with the National Travel Survey where shopping and commuting were the most common reasons for trips in 2022. Visiting friends or relatives, and leisure/entertainment are also common trip purposes.
- Travel by car/van or walking are carried out most frequently, while bus, train or taxi are carried out less frequently. Mopeds and motorbikes are used predominantly at the weekends.
- A minority of people combine more than one type of transport into one trip. If they do, they will combine 2 types of transport, such as walking and public transport.
- Of those surveyed, walking and using the car will continue to be the main forms of transport in the next 12 months. Half of those surveyed will continue to use the train, and is most prevalent in those earning £25k+

# 6.0 Conclusions and Opportunities

## Walking and wheeling

Walking/wheeling is the most used mode of transport of those surveyed, and respondents suggest this will be their leading mode of transport for the next year.

By wheeling, we mean use of a wheelchair, mobility scooter or other wheeled mobility aid.

Walking/wheeling is mainly used for leisure (58%), for grocery shopping (47%) and getting to work (42%). It is also used when combining multiple modes, such as with bus, car or train.

Satisfaction ratings of the provision for walking/wheeling in the local area are moderate at 43%, with 26% rating this poorly. Safe and quality provision are areas where the current walking infrastructure is lacking.

Only 43% state that destinations are walkable, with issues including poor surface quality (43%). Just 26% state they have well-maintained or well-connected paths. With a third (33%) saying they have safe pavements to walk along.

For those who do not walk, time constraints are a key reason for not doing so. Respondents indicated that weather and fitness level play a large part in their ability to walk places. For those aged 70+, fitness was a key barrier. Safety, particularly pavement lighting was a barrier and a reason for reducing walking in the future, especially for those aged 30-49 years old, LGBTQ+ people and women.

Two thirds of respondents stated it was important to make more sustainable travel choices, and 62% support infrastructure investment to make it easier to walk/wheel.

### Opportunities

While time constraints or weather are a limitation that is difficult to avoid, safety and maintenance are key concerns. To help encourage walking, the survey results indicate that there should be:

Investment in well-lit and well-maintained walking routes: Improving the footpath infrastructure so that is well-lit and maintained for walking would benefit all users, particularly women and LGBTQ+ people who expressed safety concerns when walking. This will enable more people to choose this as a sustainable mode of travel.

# 6.0 Conclusions and Opportunities

## Car use

The car is the second most used transport mode in a typical week among survey respondents. The car is also intended to be the second most used over the next year.

It is used most for food/grocery shopping (79% for drivers; 59% for passengers), commuting to work (75% for drivers), or leisure and entertainment (54% for passengers).

Convenience (63% for drivers; 56% for passengers) is cited as the key reason for using the car. Parents will often use the car when taking their child to school, as time constraints or distance limit their alternatives. It is also preferred for travel to the airport, with minicab only preferred for those earning £100k+. Using the car is often combined with walking.

Road conditions could be improved, with only 20% very/fairly satisfied with the condition.

Costs are an area affecting people's car use. This includes parking costs, which are more of a reason to reduce for people 70+. Fuel and insurance costs impact those under 50 years-old more.

### Electric Vehicles (EV)

Adoption of EVs is low, with only 6% of car users owning an EV or plug-in hybrid. When asked about charging, 84% of EV users indicate they use private charging close to home. Workplace charging could benefit from wider availability, as 58% have no charging stations, and the lack of access to charging infrastructure is the second biggest barrier to using an EV. Cost of purchase is the main barrier. These two points are important as 42% of all respondents express an intention to purchase or lease an EV in the next 2-10+ years.

### Connected and Autonomous Vehicles

CAVs are an area of uncertainty among most respondents, with a third indicating they would be willing to use one if it was available. Those younger than 49 years-old or earning £55k+ are more interested in CAVs. The barriers are related to security and unfamiliar technology, but this is less of an issue among those under 30 years-old. Limited information/ awareness was more of a barrier among this group, and particularly women.

### Car sharing and Car Clubs

Formal car sharing with other people and car clubs/ hiring are two transport modes use by very few respondents. Car sharing is seen as not as flexible nor as secure as driving by yourself, and these security concerns are prominent among women and those aged under 50. Preference for an own vehicle is a barrier to car clubs, though less of a concern among people under 30.

# 6.0 Conclusions and Opportunities

## Car use

### Opportunities

The survey highlights that using the car will continue to be the case in the forthcoming 12 months, although road conditions and costs are a limitation. Respondents indicated an interest in being more sustainable in their transport choices, and there are ways to encourage a shift from petrol or diesel vehicle to more sustainable choices in the future.

Responses from the survey provide the following opportunities:

Wider availability of workplace charging and tackling purchase costs of electric vehicles (EVs): To address these issues, advocate for government grants and consider regulations requiring workplaces to offer charging stations. Greater focus on the longer-term fuel and maintenance savings for EVs can also incentivise adoption. Tackling these cost and infrastructure barriers could play a key role in accelerating the shift towards EVs.

EV Incentives and educational campaigns: 16–29-year-olds are more open to new technologies, as displayed by their interest in CAV technology. Developing targeted campaigns that highlight the environmental and potentially financial benefits of EVs (e.g., lower running costs, tax breaks) could be one way to encourage adoption.

Targeted campaigns and additional research for increasing car club/sharing adoption: Additional research and campaigns could focus on the safety and flexibility aspects in relation to these two alternatives. If people consider these to be safer, this could help to reduce the reliance on car ownership and reduce the number of cars on the road. People need to be aware of where these options are offered, and the variety of options they could be using as an alternative to their personal car.

Improving road conditions: This would enable all car users a better experience when travelling on roads within the TE area.

# 6.0 Conclusions and Opportunities

## Cycling

Despite 44% of respondents owning a bicycle, only 9% report that they use bike as mode of transport in a typical week.

Cycling provision is not considered to be good in the TE area across all respondents, as only 21% rate this as very good/good. A third (34%) state there is no provision or dedicated cycling infrastructure locally, and only a quarter (25%) report there being separate bike lanes.

The key barriers and concerns of respondents are safety related. Concerns with road traffic was the top barrier (43%). The lighting of cycling routes was most notable among women and those in the younger age groups (16-49 years old). It was also the leading reason for why respondents intend to reduce their cycling (33%). Weather is also reported as a barrier.

With many wanting to make more sustainable transport choices, ways to encourage cycling include segregated cycle lanes, well-lit, well-maintained and well-connected cycle lanes.

Cycle to work schemes were particularly appealing for those under 30 years-old, as well as safe bike storage at work or near home.

Encouraging future use is however limited by age, with the older age groups indicating fewer areas that would encourage them to cycle in the future.

### Opportunities

Similar to walking there is a need for further investment in cycling provision, particularly given the low uptake. With safety, dedicated cycle lanes and maintenance as barriers to using this mode, addressing these is an opportunity.

- Prioritise improvements to cycling infrastructure: The survey highlights cycling has limited uptake and only 21% rate cycling infrastructure positively. Investments should focus on improvements like dedicated cycling lanes, or lanes protected from the road. This will make cycling a safer and more attractive option for all ages and demographics, potentially encouraging a shift away from car use for short trips.

# 6.0 Conclusions and Opportunities

## Public transport & DRT

### Bus

The bus is the most used mode of public transport (23%), with the main purpose of journeys being commuting to work. For many, the bus stop is close to the start of the journey, and buses offer a direct service. A key limitation are fewer early/late services, where 29% are dissatisfied with the availability in their area. For respondents who use the bus, convenience is the main reason. And non-users state the reverse - the main reason for not using the bus is inconvenience (51%), followed by the infrequency of services (48%). Safety is more of an issue among 16-29 year olds.

Future use is limited by ticket costs. This is the case for most, including current users, except for 70+ who benefit from concessionary passes. A travel pass scheme was noted to have great appeal by 16-29 year-olds.

Infrequent and unreliable services also limit future use, making it harder to rely on this mode of transport.

### Train

Train use is lower at 12%, however generally people are satisfied. Satisfaction with information provision on trains (71%) and capacity on-board (71%) are positive. Cost is a key deterrent – 45% of all train users are dissatisfied with the price of fares. It is the leading reason for why respondents will reduce their rail use in the future, and for 48% of non-train users this is the top barrier. Secondary to this are improving facilities and minimising the crowding on services as particularly noted by those aged 16-29.

### Demand-Responsive Transport

Only 26% are aware of DRT, reflecting the limited number of DRT services in the region. Of those aware, the use of this mode is low, with 62% having never used it. Interest in using DRT in the future is limited across the all groups.

### Opportunities

- Invest in improving public transport scheduling and reliability: The survey indicates dissatisfaction with frequency and reliability, mainly of buses. Exploring options like dedicated bus lanes or signal priority to improve bus travel times and consistency. Also introducing earlier and later services.
- Promoting safety: Continuing to reassure passengers of safety on board buses, by conveying what is already in place. This directly addresses the concerns of 16-29 year olds, who reported safety issues on buses as a higher concern.
- Promote discounted public transport options: Fare reductions would ease the barriers associated with using the train and bus. Also, 16-29 year olds are more budget-conscious and implementing travel passes could make it more affordable and attractive to use.

# 6.0 Conclusions and Opportunities

## Work and shopping behaviours

### Working

64% of respondents are currently working in a typical week, and work is one of the key reasons people are travelling by transport. Of this group, half are commuting to work all the time, and only 7% work from home all the time. Factors influencing this are 41% are unable to work remotely, with a further 17% mandated to be physically present. Flexibility is available to some (16%), but most people spend at least a proportion of their time at the workplace.

Travelling to work takes on average 31 minutes, and this is influenced by where people's work location is. In all LTAs, most people work internally within the LTA area, however Thurrock and Southend-on-Sea see a higher number leaving to go to other LTAs within Transport East's region or outside the region – typically London.

### Shopping

Food or grocery shopping is one of the common purposes for travel, alongside work and socialising. People are more likely to travel for food/grocery shopping by car, either driving themselves or as a passenger.

Focusing on non-food shopping, respondents will mainly visit nearby towns, or cities (41% choose locations close to their residence). There is, however, a notable preference for home deliveries, with 85% using home deliveries frequently or sometimes. This is most pronounced among those on a middle income of £25-54,999k and aged between 30-49 years old. The level of online shopping is expected to increase for this age group, and people are keen to see options for deliveries to be combined or delivered on day that reduces carbon emissions.

### Opportunities

- Promote combined deliveries with reduced emissions: Encouraging delivery companies to offer same-day deliveries that combine packages from different retailers or use low-emission vehicles. This would appeal to the 30-49 year-olds who use home deliveries most, catering to their need for convenience while aligning with their interest in sustainability.

# 6.0 Conclusions and Opportunities

## Environment

Respondents were asked to share their views towards environmental and social issues, with a focus on their current travel behaviours.

There is a high environmental concern, more so than social. Concern is highest for habitat loss (47%) and single-use plastics (41%). This is most apparent in those aged 50+, where the figures increase to 57% and 61% respectively.

To address concerns and influence behaviour, there is a desire:

- For Government, Councils and companies to do more to help the environment
- Government and Councils and could introduce quieter neighbourhoods with reduced traffic, as well as clean air zones
- Offering more public transport routes / services, and investing in walking/ wheeling and cycling infrastructure
- Incentivising sustainable travel through reduced fares – welcomed most by those on income above £25k
- To be more sustainable where possible. Respondents focus on actions that are simple to do, e.g. recycling, switching off appliances and re-using items. 68% think it is important to make sustainable choices when travelling, however when asked about what they personally care about, only minority (43%) agree that sustainable travel is important to them, and only 33% think they are currently travelling sustainably.

  This shows a disconnect between ideals and day-to-day choices made. The disconnect is most evident in respondents aged 16-49, who are more likely to state sustainable travel is important to them but are less likely to currently be taking these travel options.

**Opportunities**

- Target 16-49 year olds with sustainable travel options: This age group shows the strongest personal interest in travelling sustainably but are less likely to be taking these options compared to other age groups. Developing targeted campaigns and initiatives that promote and nudge this group towards sustainable options like cycling, walking/ wheeling, and public transport.
- Bridge the gap between awareness and action: While 68% value sustainable travel, only 33% currently use such options. Strategies to bridge this gap, such as education campaigns highlighting the environmental impact of travel choices; making sustainable options more convenient and accessible (e.g., dedicated cycling lanes, improved public transport schedules); and financially incentivising sustainable.

# 6.0 Conclusions and Opportunities

## Funding

Respondents were asked to prioritise alternative opportunities to raise funding to address the future reduction in tax from petrol and diesel fuel due to the transition to EVs.

Monetary charges received mixed views, e.g. workplace charging, toll charges, or car parking charging. A notable percentage of people did not welcome these initiatives. Younger ages, those earning over £100k, or EV drivers were more accepting of charges as a means for encouraging sustainable transport choices.

If additional funding was available, the top priorities for funding in the future are:

- Improving road conditions
- The provision of public transport
- Subsidising the costs of local bus services

Less well supported are ideas that do not have a wide benefit – e.g. EV charging points, or specific named transport projects.

In a scenario where road charging were to be introduced to address the gap in funding, respondents agreed that it should be based upon emissions from the vehicle, or the size and weight of the vehicle – both seen as fair ways to address any gaps in funding.

Secondary to this were increasing taxes on EVs and hybrids or using an existing proportion of the tax revenue to support the gap – and less welcomed by EV users and those younger than 30. Reducing Government spending on transport was not a preferred scenario for anyone.

### Opportunities

Based upon the priorities for survey respondents, there is an opportunity to:

- Consider allocating resources based on public priorities: Explore the concept of a road charging scheme based on emissions or vehicle size/weight to generate additional funds for transportation improvements. Of the options given in the survey, respondents would prefer any funding from such a charge to address improving road conditions, investing in public transport provision, and subsidising local buses.

# 6.0 Conclusions and Opportunities

## Future Messaging

Respondents were asked to select which messaging would help them make a more sustainable transport choice. The focus was particularly on changing behaviour from car to cycling or walking/ wheeling if the option was available to them.

Based on this, a focus on **personal health benefits** was considered the most effective message.

Though it is important that the messaging acknowledges that walking and cycling may not be suitable for everyone or every trip due to health limitations or age.

What do people want to see?

- **Highlighting the overall health benefits and improvements:**

Focusing on the overall positive impact of cycling and walking/ wheeling on physical and mental wellbeing. This could be done via emphasising the energy boost, longer-term benefits and improved mood associated with this type of active travel. It is key that the messaging showcases how easily this can be integrated into daily routines and less inconvenient, e.g. “Cycling is healthy and free way of transport”.

- **Promote health lifestyle benefits**

Weight management was an area highlighted for messaging, but this should be clearly within the context of an overall healthy lifestyle, as weight won’t be relevant issue for all.

- **Leverage the NHS for credibility**

Partnering with the NHS would help endorse the health benefits of cycling and walking/ wheeling. Using credible sources can be a way to build trust and encourage wider adoption.

- **Promote a mix of sustainable travel options**

Acknowledging that walking/ wheeling or cycling may not be appropriate for everyone, so promoting a mix of sustainable travel options including public transport, will help cater to different needs and abilities. Also, focusing on a gradual adoption, such as short trips will still make a difference.

# 7.0 Appendix

## 7.1 Methodology

# 7.1 Methodology

## Sampling & Recruitment

| LTA | Target | Achieved |
|---|---|---|
| Norfolk | 725 | 944 |
| Suffolk | 580 | 766 |
| Essex | 1,305 | 1,488 |
| Southend-on-Sea | 145 | 284 |
| Thurrock | 145 | 238 |
| 20-mile radius | 100 | 105 |
| Total | 3,000 | 3,825 |

### Sampling

The target population of this survey includes all individuals aged 16+ years, currently living in the Transport East area (Norfolk, Suffolk, Essex, Southend-on-Sea and Thurrock), including a proportion of those living within a 20-mile radius who travel into the Transport East area.

The total sample size of this survey is 3,825.

To ensure the findings effectively represent the population of interest, quotas were used to reflect the proportion of residents in each district and LTA (see table on the left). The proportions were based on the Census 2021 within the Transport East region.

### Recruitment

Respondents were recruited through panels and an open link. The open link served as a supplement to the panels, supporting regions with lower response rates. It was shared through Transport East's channels and partner organisations including the local authorities.

To encourage survey participation, an incentive was provided to open link respondents – all participants who completed the survey had the opportunity to win one of three £100 Love2shop vouchers.

# 7.1 Methodology

## Data Collection

**25-minute online survey between March 18th to April 17th 2024**

### Key survey considerations

Survey needs to:

- Provide robust sample sizes for each district within the Transport East area
- Provide detail of existing and future travel behaviour and reason for choices
- Cover barriers and attitudes towards different types of transport
- Help understand attitudes towards different messaging and its possible impact
- Help understand attitudes towards different measures that may encourage transport type shift and bridge funding gap

### Questionnaire outline

**Section 1: About you**

- Initial Demographics

**Section 2: Current travel behaviours**

- Travel behaviours in the last two days (at the time of completing the survey)
- Typical travel behaviours in a regular week

**Section 3: Future travel behaviours**

- Likelihood of use
- Barriers to use
- Encouraging future use

**Section 4: Views on messaging**

- Climate change/carbon emissions
- Funding gap
- Messaging that would encourage change in behaviour

**Section 5: Demographics**

- Final demographics questions

# 7.1 Methodology

## Data Analysis & Reporting

### Weighting

Demographics were not controlled for when recruiting respondents to maximise responses. Thus, data in the report is weighted to be representative of age and gender from the Census 2021 for each district in the TE region.

The scale of the weighting was somewhat significant as we applied weights to both gender and age. The weighting process involved several steps:

1. Firstly, the populations sizes were taken from the census data for age and gender by district. This identified how many people under each age cohort or gender lived within each district area or unitary authority.

2. A sum of the population was then taken for each measure. For gender a sum of the population across the 24 districts and 2 unitary authorities was produced, and the same was conducted for gender.

3. This total population was then used to work out the relevant percentage sizing of the gender and age within each district relative to the whole TE region. I.e. what was the split of women to men in Babergh relative to the TE region.

4. With the inclusion of 2.75% of those living within 20-miles radius of the TE region, the percentage sizing was rebased slightly to account for the 2.75%. The final weighting is 97.25% for TE region and 2.75% for those living outside of the catchment area, where the figures by age and gender were based upon their natural fallout in the survey, i.e. how many the survey was able to receive without having any set requirements in place.

5. The weighting criteria produced was then applied into the dataset and used when analysing the data across the report.

*To note, social grade was not included in the weighting regime. By applying into the weighting criteria, it reduced the representativeness of the data of the TE population, and so is shown as how they were received in the survey data.*

### Adjustments

When asked about modes of transport used, respondents would answer about each mode individually from the ones they had selected. For public transport, we report on these individually in the charts (i.e. bus, train, underground), but may report in the commentary about public transport combined. To combine public transport, we create a NET % of bus, train and underground use that has been adjusted to account for any overlaps between the three modes. For instance, a respondent may have only selected underground, while another may have selected all three items but different codes for each. This method means we can combine all the codes that are selected across the modes of transport to provide a true reflective figure and provide a more accurate overall percentage.

# 7.1 Methodology

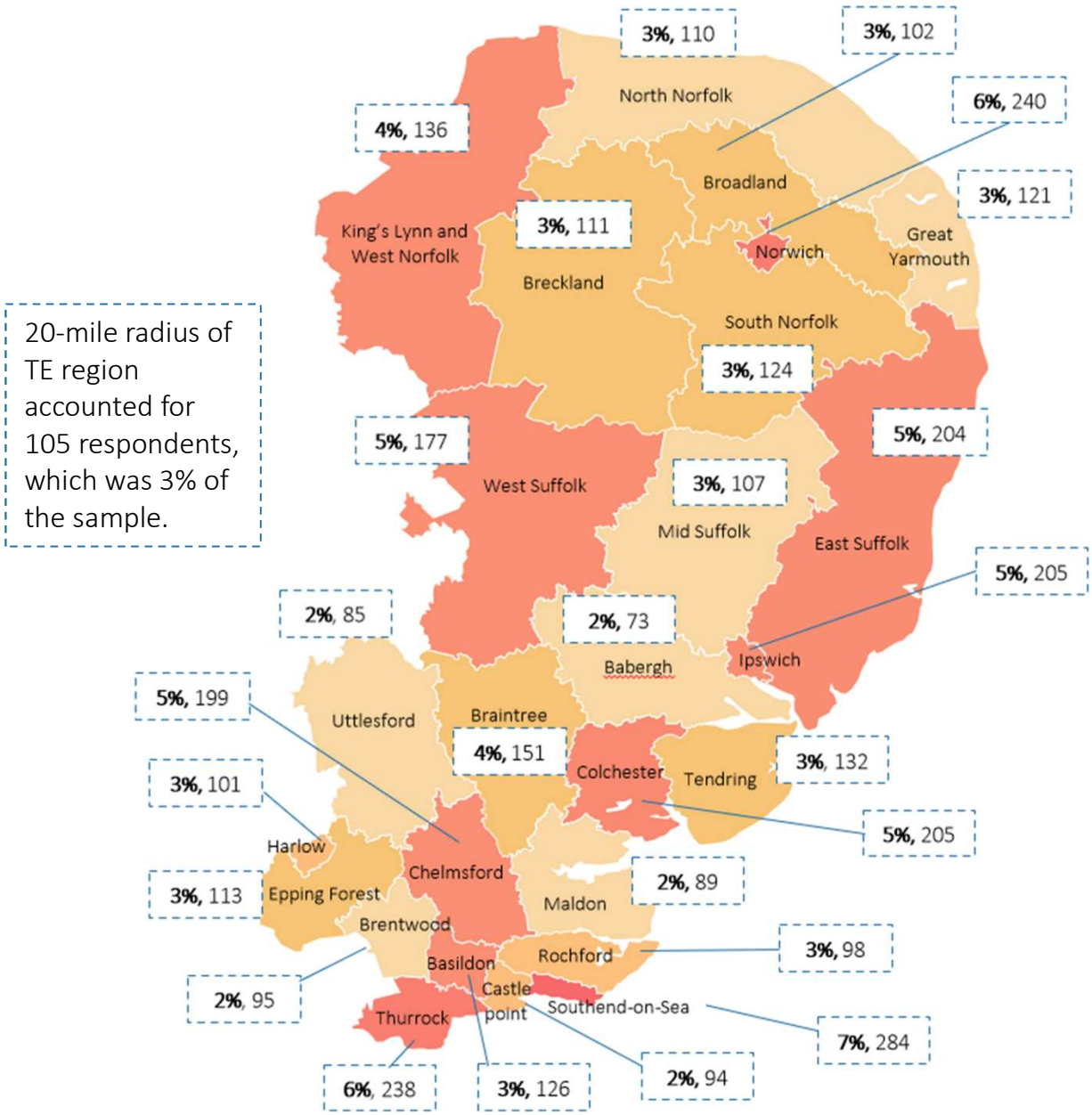
## Distribution of responses and % of total responses

The map to the right shows the number of responses and response rates across the region. These were controlled by target quotas based on the Census 2021, to minimise bias of any one district or authority. The numbers are the sum of both the panel and open link responses.

Of the Local Transport Authorities (LTAs, detail on page 9), Essex had the highest number of responses (1,488 responses) and accounted for 39% of the total responses. However, it was the only LTA where not all districts achieved their target response rate (detail on page 9). Despite this, the sample size of each district is large enough to provide data to analyse.

Southend-on-Sea achieved the highest uplift in responses from the open link, with a 96% increase above the initial target (from 145 to 284 in the results).

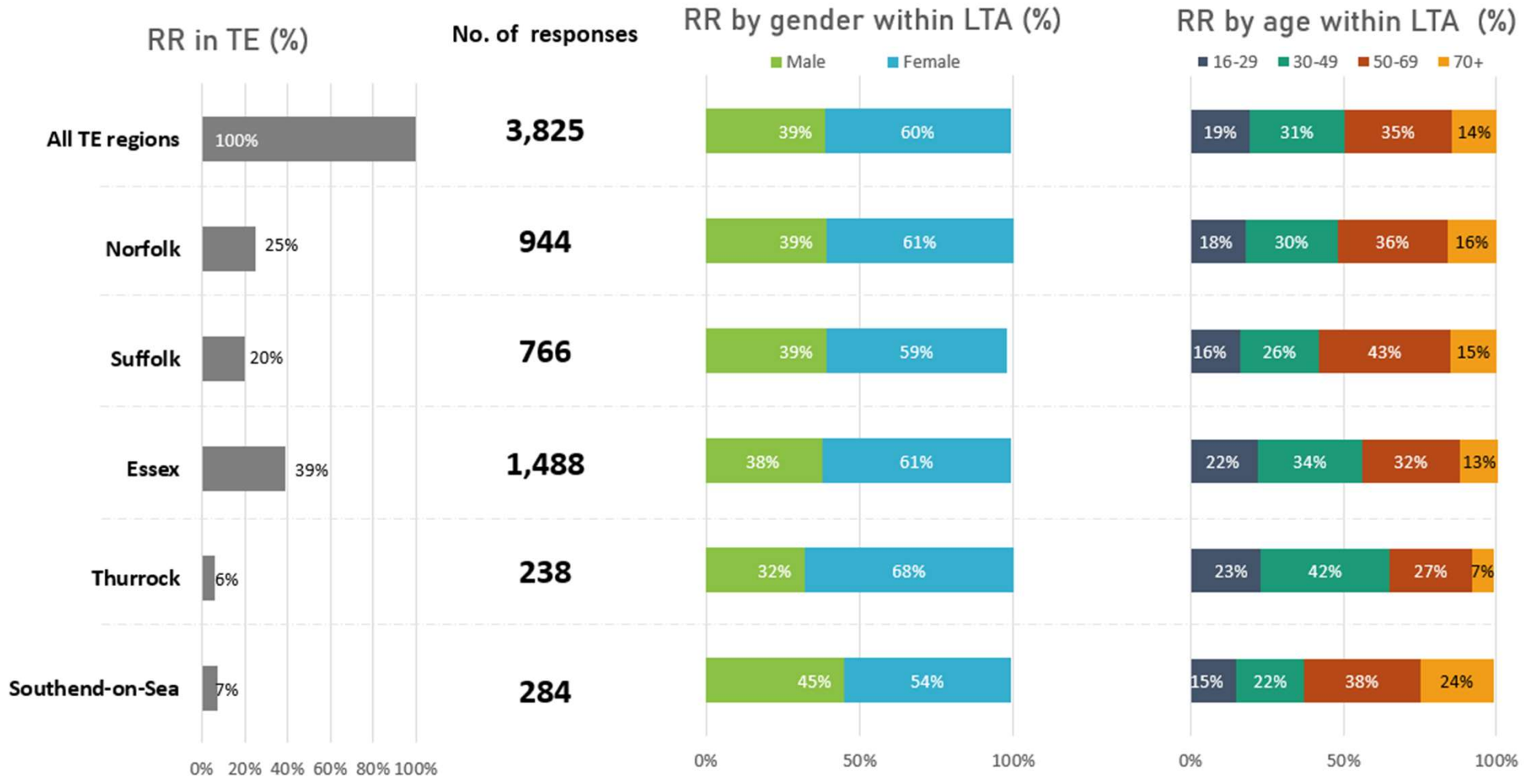
At a district level, Mid-Suffolk council area achieved the largest number of responses relative to the initial target (target of 50; achieved 107 responses).




Note: the map shows the % of total responses, and the number of responses of each district

# 7.1 Methodology

## Response rate




Summary of responses and response rate (RR) by local transport authorities, and split by age and gender
*(response rates based on the natural fallout before weighting is applied)*

Note: The combined percentages for male and female respondents do not always sum to 100% due to the inclusion of 'Prefer not to say'.

# 7.0 Appendix

## 7.2 TE Overview – Current Travel Behaviours and Attitudes

# 7.2 TE Overview – Current Travel Behaviours and Attitudes

## Transport Modes used in last two days

| Transport modes used (last two days) | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Heterosexual | LGBTQ+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Car - owned/work driven by yourself) | 63% | 59% | 39% | 64% | 65% | 70% | 62% | 50% | 47% | 66% | 45% | 60% | 69% | 74% |
| Walk | 55% | 54% | 55% | 59% | 52% | 51% | 54% | 57% | 53% | 55% | 49% | 54% | 61% | 54% |
| Car – owned by yourself or someone else, with you as passenger | 18% | 34% | 37% | 25% | 24% | 23% | 26% | 32% | 31% | 25% | 23% | 26% | 32% | 21% |
| Bus | 18% | 20% | 30% | 19% | 13% | 21% | 19% | 25% | 26% | 17% | 26% | 19% | 14% | 18% |
| Train | 14% | 11% | 20% | 16% | 11% | 4% | 12% | 15% | 9% | 13% | 10% | 12% | 14% | 22% |
| Bicycle | 11% | 5% | 12% | 9% | 8% | 4% | 8% | 7% | 6% | 9% | 7% | 10% | 6% | 14% |
| Underground | 7% | 6% | 8% | 8% | 5% | 4% | 6% | 7% | 5% | 7% | 4% | 5% | 9% | 10% |
| Taxi/Minicab/ private hire vehicle | 4% | 3% | 7% | 3% | 2% | 3% | 3% | 4% | 5% | 3% | 3% | 4% | 2% | 11% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.2 TE Overview – Current Travel Behaviours and Attitudes

## Travel purposes (last two days)

| Travel purposes (last two days) | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Heterosexual | LGBTQ+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Work (including volunteering) | 63% | 57% | 57% | 59% | 62% | 66% | 60% | 61% | 54% | 62% | 56% | 61% | 57% | 66% |
| Food or grocery shopping | 51% | 59% | 49% | 57% | 53% | 61% | 55% | 56% | 57% | 55% | 58% | 57% | 54% | 42% |
| Visit friends or relatives | 19% | 31% | 29% | 29% | 22% | 21% | 25% | 34% | 28% | 25% | 26% | 27% | 26% | 19% |
| All other modes of shopping | 17% | 18% | 17% | 17% | 17% | 20% | 17% | 21% | 18% | 18% | 16% | 16% | 20% | 15% |
| Walking or cycling for leisure | 16% | 16% | 12% | 15% | 18% | 17% | 16% | 18% | 13% | 17% | 15% | 18% | 15% | 11% |
| Going to a restaurant, pub or bar | 16% | 16% | 19% | 15% | 13% | 19% | 16% | 13% | 17% | 16% | 11% | 17% | 17% | 23% |
| Personal business – other | 11% | 12% | 14% | 12% | 11% | 11% | 11% | 17% | 12% | 11% | 9% | 10% | 14% | 20% |
| Entertainment | 9% | 11% | 11% | 13% | 7% | 9% | 10% | 12% | 12% | 10% | 7% | 10% | 11% | 12% |
| Personal business – medical | 8% | 8% | 8% | 7% | 7% | 12% | 8% | 9% | 14% | 6% | 9% | 9% | 5% | 11% |
| Taking your child/ren to/from school | 6% | 8% | 8% | 14% | 4% | 2% | 7% | 6% | 8% | 7% | 4% | 6% | 11% | 12% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.2 TE Overview – Current Travel Behaviours and Attitudes

## Transport modes used (typical week)

| Transport modes used (typical week) | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Heterosexual | LGBTQ+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Walk | 64% | 64% | 59% | 58% | 70% | 68% | 65% | 62% | 55% | 68% | 61% | 65% | 65% | 65% |
| Car - owned/work driven by yourself) | 64% | 61% | 37% | 61% | 70% | 77% | 64% | 46% | 47% | 69% | 45% | 64% | 76% | 70% |
| Car – owned by yourself or someone else, with you as passenger | 16% | 32% | 27% | 23% | 24% | 24% | 24% | 27% | 28% | 23% | 17% | 25% | 30% | 23% |
| Bus | 24% | 23% | 29% | 20% | 18% | 32% | 23% | 27% | 27% | 23% | 31% | 22% | 16% | 23% |
| Train | 14% | 10% | 14% | 14% | 12% | 5% | 12% | 9% | 10% | 12% | 6% | 12% | 14% | 22% |
| Bicycle or pedal cycle | 12% | 7% | 8% | 9% | 12% | 6% | 9% | 9% | 6% | 10% | 7% | 10% | 8% | 12% |
| Underground | 5% | 5% | 4% | 7% | 4% | 5% | 5% | 3% | 3% | 6% | 2% | 4% | 8% | 14% |
| Taxi/Minicab/ private hire vehicle | 3% | 2% | 5% | 3% | 2% | 1% | 2% | 4% | 5% | 2% | 2% | 3% | 1% | 5% |
| Van – owned/work, driven by yourself | 3% | 1% | 0% | 2% | 2% | 1% | 2% | 1% | 1% | 2% | 2% | 2% | 2% | 1% |
| Motorcycle / Moped | 2% | 0% | 1% | 1% | 2% | 1% | 1% | 1% | 1% | 1% | 1% | 1% | 1% | 2% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.2 TE Overview – Current Travel Behaviours and Attitudes

## Parking Costs – willingness to pay

| How much more are you willing to pay? | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Heterosexual | LGBTQ+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| 0% - 20% | 31% | 38% | 40% | 34% | 31% | 32% | 33% | 59% | 38% | 34% | 40% | 34% | 38% | 25% |
| 21% - 40% | 12% | 11% | 10% | 15% | 11% | 7% | 12% | 6% | 12% | 11% | 10% | 14% | 8% | 19% |
| 41% - 60% | 14% | 12% | 16% | 16% | 14% | 5% | 13% | 15% | 9% | 14% | 4% | 14% | 16% | 13% |
| 61% - 80% | 10% | 5% | 15% | 9% | 2% | 2% | 8% | 7% | 10% | 7% | 4% | 7% | 10% | 12% |
| 81% - 100% | 6% | 3% | 4% | 4% | 5% | 5% | 5% | 1% | 4% | 4% | 1% | 4% | 6% | 6% |
| Don't know/ Not sure | 27% | 32% | 17% | 23% | 37% | 49% | 30% | 12% | 26% | 29% | 41% | 27% | 22% | 25% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.2 TE Overview – Current Travel Behaviours and Attitudes

## Transport modes to the airport – international travel

| Transport modes | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Heterosexual | LGBTQ+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Car (passenger) | 21% | 52% | 47% | 36% | 33% | 28% | 35% | 49% | 35% | 36% | 37% | 32% | 38% | 33% |
| Car (driver) | 47% | 24% | 22% | 38% | 42% | 37% | 36% | 30% | 30% | 38% | 20% | 34% | 44% | 39% |
| Taxi or Minicab or private hire vehicle | 24% | 19% | 17% | 20% | 19% | 35% | 22% | 17% | 22% | 22% | 21% | 19% | 19% | 34% |
| Train | 21% | 16% | 19% | 20% | 20% | 13% | 18% | 27% | 17% | 19% | 20% | 20% | 16% | 23% |
| Bus | 12% | 10% | 15% | 15% | 7% | 5% | 11% | 12% | 16% | 9% | 14% | 13% | 8% | 10% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.2 TE Overview – Current Travel Behaviours and Attitudes

## Transport modes to the airport – domestic travel

| Transport modes | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Heterosexual | LGBTQ+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Car (passenger) | 17% | 39% | 35% | 22% | 33% | 16% | 28% | 28% | 25% | 29% | 27% | 29% | 24% | 24% |
| Car (driver) | 42% | 29% | 24% | 41% | 34% | 50% | 36% | 22% | 28% | 38% | 23% | 36% | 46% | 32% |
| Taxi or Minicab or private hire vehicle | 24% | 19% | 17% | 20% | 19% | 35% | 22% | 17% | 22% | 22% | 21% | 19% | 19% | 34% |
| Train | 21% | 16% | 19% | 20% | 20% | 13% | 18% | 27% | 17% | 19% | 20% | 20% | 16% | 23% |
| Bus | 12% | 10% | 15% | 15% | 7% | 5% | 11% | 12% | 16% | 9% | 14% | 13% | 8% | 10% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.2 TE Overview – Current Travel Behaviours and Attitudes

## Transport modes likely to use in the next 12 months

| Transport modes likely to use in the next 12 months | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Heterosexual | LGBTQ+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Walk | 74% | 78% | 72% | 73% | 81% | 76% | 77% | 73% | 68% | 79% | 74% | 77% | 78% | 70% |
| Car - owned/work driven by yourself) | 68% | 65% | 43% | 65% | 74% | 77% | 68% | 55% | 51% | 73% | 48% | 69% | 79% | 69% |
| Train | 50% | 51% | 45% | 53% | 54% | 47% | 51% | 51% | 43% | 54% | 39% | 52% | 59% | 59% |
| Bus | 47% | 48% | 46% | 45% | 44% | 58% | 48% | 48% | 48% | 48% | 52% | 50% | 41% | 44% |
| Car – owned by yourself or someone else, with you as passenger | 32% | 53% | 41% | 43% | 47% | 39% | 43% | 44% | 45% | 44% | 36% | 42% | 50% | 40% |
| Underground | 31% | 31% | 22% | 33% | 35% | 31% | 31% | 27% | 23% | 34% | 20% | 31% | 39% | 42% |
| Bicycle or Pedal cycle | 29% | 18% | 27% | 26% | 26% | 12% | 24% | 21% | 16% | 25% | 18% | 25% | 25% | 29% |
| Taxi/Minicab/ private hire vehicle | 22% | 24% | 19% | 24% | 23% | 26% | 24% | 19% | 26% | 23% | 21% | 21% | 23% | 36% |
| Coach | 10% | 9% | 9% | 8% | 9% | 13% | 10% | 9% | 11% | 9% | 13% | 10% | 6% | 8% |
| Car – hired/rented | 5% | 3% | 2% | 4% | 4% | 4% | 4% | 3% | 2% | 4% | 1% | 3% | 8% | 8% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.0 Appendix

## 7.3 TE Overview – Future travel behaviour and choices: Barriers and decline in use

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to Cycling

| Barriers to cycling | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Safety concerns - road traffic | 42% | 45% | 34% | 42% | 49% | 46% | 43% | 49% | 37% | 46% | 36% | 46% | 47% | 41% |
| Weather | 35% | 37% | 30% | 30% | 44% | 39% | 35% | 45% | 30% | 38% | 30% | 37% | 38% | 31% |
| Safety concerns - route lighting | 26% | 32% | 37% | 36% | 24% | 17% | 28% | 33% | 27% | 30% | 25% | 29% | 33% | 31% |
| Fitness level | 19% | 24% | 18% | 17% | 21% | 33% | 21% | 31% | 26% | 20% | 21% | 22% | 20% | 21% |
| Not a direct route/ inconvenient | 18% | 21% | 22% | 24% | 18% | 12% | 18% | 26% | 16% | 20% | 14% | 18% | 26% | 22% |
| Time constraints (can take too long) | 18% | 20% | 17% | 21% | 20% | 18% | 19% | 21% | 13% | 21% | 11% | 19% | 25% | 26% |
| Lack of cycle routes/signage | 16% | 16% | 18% | 17% | 17% | 11% | 16% | 21% | 17% | 16% | 12% | 17% | 19% | 20% |
| Lack of safe storage at destinations | 16% | 15% | 13% | 15% | 18% | 14% | 15% | 16% | 15% | 16% | 14% | 16% | 14% | 15% |
| Physically unable to | 12% | 17% | 6% | 10% | 17% | 28% | 14% | 17% | 35% | 9% | 20% | 15% | 10% | 9% |
| Cost of purchasing/ hiring a bicycle | 11% | 16% | 17% | 13% | 13% | 10% | 13% | 22% | 13% | 13% | 18% | 13% | 12% | 7% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to Cycling

| Reasons reduce cycling | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male * | Female ** | 16-29 ** | 30-49 ** | 50-69 ** | 70+ ** | Hetero-sexual * | LGBTQ+ ** | Yes ** | No * | Under £25k ** | £25K-£54,999 ** | £55K-£99,999 ** | £100K+ ** |
| Safety concerns - route lighting | 31% | | | | | | 38% | | | 42% | | | | |
| Safety concerns - road traffic | 31% | | | | | | 30% | | | 32% | | | | |
| Time constraints (can take too long) | 16% | | | | | | 21% | | | 29% | | | | |
| Weather | 15% | | | | | | 18% | | | 23% | | | | |
| Cannot cycle (do not know how to) | 14% | | | | | | 15% | | | 13% | | | | |
| Lack of awareness of cycle routes/signage | 9% | | | | | | 16% | | | 17% | | | | |
| Not a direct route/ inconvenient | 17% | | | | | | 16% | | | 21% | | | | |
| Travelling with others makes it difficult | 10% | | | | | | 16% | | | 18% | | | | |
| Lack of cycle routes/signage | 13% | | | | | | 14% | | | 14% | | | | |
| Impact of cycling on physical appearance | 7% | | | | | | 12% | | | 11% | | | | |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to Public Transport - Bus

| Barriers to public transport BUS | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Not direct route/ inconvenient | 51% | 52% | 34% | 49% | 60% | 55% | 52% | 44% | 44% | 54% | 48% | 50% | 55% | 53% |
| Ticket costs | 33% | 36% | 38% | 34% | 38% | 25% | 34% | 39% | 31% | 37% | 39% | 36% | 34% | 27% |
| Infrequent services | 48% | 48% | 39% | 42% | 54% | 57% | 48% | 47% | 43% | 51% | 40% | 49% | 51% | 48% |
| Time constraints (can take too long) | 40% | 42% | 41% | 34% | 46% | 43% | 40% | 45% | 38% | 42% | 38% | 38% | 41% | 56% |
| Does not go to destinations I need | 35% | 36% | 20% | 29% | 45% | 45% | 36% | 25% | 29% | 38% | 32% | 38% | 33% | 35% |
| Safety concerns – other's behaviour | 22% | 24% | 35% | 19% | 23% | 17% | 22% | 34% | 27% | 21% | 25% | 20% | 23% | 26% |
| Lack of awareness of services available | 22% | 22% | 27% | 18% | 22% | 22% | 21% | 34% | 21% | 22% | 22% | 21% | 23% | 20% |
| Health concerns – worried get ill from others | 18% | 20% | 27% | 15% | 19% | 20% | 17% | 36% | 26% | 17% | 21% | 21% | 18% | 13% |
| Limited early morning/ evening services | 21% | 24% | 21% | 18% | 28% | 22% | 21% | 33% | 23% | 23% | 23% | 22% | 23% | 18% |
| Physical accessibility of this transport | 14% | 15% | 14% | 10% | 16% | 20% | 14% | 18% | 31% | 10% | 25% | 14% | 9% | 11% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to Public Transport - Train

| Barriers to public transport TRAIN | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Not direct route/ inconvenient | 44% | 42% | 31% | 39% | 53% | 45% | 44% | 34% | 40% | 44% | 39% | 44% | 46% | 45% |
| Ticket costs | 49% | 47% | 45% | 40% | 53% | 54% | 48% | 44% | 41% | 52% | 52% | 47% | 50% | 33% |
| Infrequent services | 32% | 26% | 27% | 24% | 33% | 28% | 29% | 22% | 24% | 30% | 24% | 31% | 28% | 32% |
| Time constraints (can take too long) | 31% | 30% | 34% | 26% | 34% | 28% | 30% | 34% | 30% | 31% | 29% | 29% | 36% | 32% |
| Does not go to destinations I need | 36% | 29% | 21% | 26% | 40% | 41% | 33% | 23% | 26% | 35% | 31% | 32% | 34% | 29% |
| Safety concerns – other's behaviour | 25% | 24% | 33% | 20% | 24% | 22% | 24% | 34% | 26% | 23% | 26% | 25% | 23% | 19% |
| Lack of awareness of services available | 23% | 20% | 26% | 17% | 22% | 21% | 20% | 33% | 21% | 21% | 23% | 21% | 19% | 22% |
| Health concerns – worried get ill from others | 22% | 21% | 28% | 17% | 21% | 20% | 20% | 34% | 26% | 19% | 23% | 21% | 21% | 11% |
| Limited early morning/ evening services | 21% | 17% | 17% | 17% | 23% | 17% | 19% | 18% | 18% | 19% | 20% | 19% | 16% | 22% |
| Physical accessibility of this transport | 19% | 18% | 20% | 13% | 19% | 22% | 18% | 28% | 31% | 14% | 25% | 16% | 14% | 18% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to Public Transport - Underground

| Barriers to public transport Underground | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Not direct route/ inconvenient | 39% | 37% | 31% | 33% | 45% | 41% | 38% | 35% | 34% | 40% | 37% | 37% | 42% | 40% |
| Ticket costs | 33% | 33% | 41% | 31% | 34% | 28% | 33% | 39% | 31% | 34% | 37% | 34% | 31% | 26% |
| Infrequent services | 24% | 20% | 23% | 18% | 25% | 22% | 21% | 27% | 19% | 23% | 20% | 22% | 24% | 23% |
| Time constraints (can take too long) | 24% | 23% | 29% | 21% | 24% | 20% | 22% | 34% | 23% | 23% | 22% | 21% | 29% | 31% |
| Does not go to destinations I need | 29% | 27% | 25% | 25% | 33% | 30% | 28% | 34% | 22% | 30% | 28% | 28% | 31% | 25% |
| Safety concerns – other's behaviour | 22% | 22% | 34% | 20% | 22% | 15% | 21% | 36% | 26% | 21% | 24% | 21% | 24% | 27% |
| Lack of awareness of services available | 18% | 18% | 22% | 16% | 16% | 16% | 17% | 23% | 16% | 18% | 19% | 17% | 17% | 24% |
| Health concerns – worried get ill from others | 19% | 17% | 26% | 16% | 17% | 13% | 17% | 28% | 20% | 17% | 19% | 17% | 18% | 24% |
| Limited early morning/ evening services | 16% | 14% | 18% | 13% | 17% | 12% | 14% | 24% | 13% | 16% | 14% | 15% | 16% | 19% |
| Physical accessibility of this transport | 16% | 14% | 17% | 11% | 16% | 16% | 14% | 20% | 24% | 12% | 21% | 14% | 10% | 17% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Reasons for reducing use of public transport - bus

| Reasons reduce public transport BUS | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 * | 50-69 ** | 70+ ** | Hetero-sexual | LGBTQ+ ** | Yes * | No | Under £25k ** | £25K-£54,999 | £55K-£99,999 * | £100K+ ** |
| Not direct route/ inconvenient | 31% | 20% | 14% | 46% | | | 29% | | 18% | 30% | | 29% | 24% | |
| Safety concerns – other's behaviour | 26% | 11% | 21% | 23% | | | 18% | | 29% | 15% | | 20% | 17% | |
| Ticket costs | 14% | 12% | 11% | 17% | | | 13% | | 11% | 14% | | 15% | 10% | |
| Infrequent services | 22% | 15% | 12% | 28% | | | 22% | | 18% | 19% | | 23% | 22% | |
| Health concerns – worried get ill | 23% | 9% | 18% | 20% | | | 19% | | 16% | 15% | | 16% | 24% | |
| Time constraints (can take too long) | 21% | 27% | 21% | 28% | | | 26% | | 24% | 21% | | 11% | 24% | |
| Lack of awareness of services available | 16% | 16% | 12% | 27% | | | 15% | | 14% | 13% | | 11% | 25% | |
| Limited early morning/ evening services | 24% | 11% | 12% | 24% | | | 19% | | 7% | 22% | | 19% | 27% | |
| Travelling with others makes it difficult | 10% | 16% | 11% | 19% | | | 13% | | 19% | 11% | | 10% | 25% | |
| Physical accessibility of this transport | 17% | 7% | 14% | 11% | | | 14% | | 7% | 16% | | 6% | 14% | |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to walking

| Barriers to walking | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Time constraints (can take too long) | 28% | 26% | 25% | 29% | 32% | 20% | 26% | 32% | 22% | 32% | 20% | 26% | 35% | 36% |
| Fitness level | 20% | 30% | 11% | 14% | 30% | 51% | 26% | 11% | 38% | 18% | 34% | 22% | 17% | 18% |
| Weather | 23% | 23% | 16% | 21% | 25% | 35% | 24% | 25% | 19% | 26% | 22% | 27% | 24% | 18% |
| Safety concerns - pavement lighting | 23% | 21% | 20% | 31% | 19% | 14% | 22% | 27% | 18% | 26% | 19% | 21% | 19% | 43% |
| Safety concerns - close to busy roads | 18% | 17% | 18% | 21% | 12% | 18% | 16% | 23% | 15% | 18% | 12% | 20% | 13% | 34% |
| Not a direct route/ inconvenient | 20% | 12% | 21% | 16% | 20% | 9% | 16% | 12% | 13% | 19% | 16% | 19% | 12% | 19% |
| Pavements hard to use - narrow/no kerbs | 16% | 12% | 16% | 14% | 13% | 14% | 14% | 15% | 16% | 14% | 13% | 13% | 14% | 18% |
| Lack of awareness of pavement routes | 10% | 7% | 11% | 12% | 6% | 6% | 9% | 14% | 9% | 8% | 8% | 8% | 8% | 8% |
| Travelling with others makes it difficult | 10% | 8% | 10% | 10% | 7% | 7% | 9% | 7% | 8% | 9% | 6% | 9% | 8% | 17% |
| Limits my employment opportunities | 10% | 7% | 6% | 11% | 13% | 2% | 8% | 12% | 5% | 11% | 6% | 7% | 14% | 7% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Reasons for reducing walking

| Reasons reduce walking | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ * | Hetero -sexual | LGBTQ + ** | Yes* | No | Under £25k * | £25K-£54,999 | £55K-£99,999 * | £100K+ ** |
| Weather | 33% | 27% | 18% | 42% | 42% | 15% | 31% | | 25% | 31% | 23% | 28% | 44% | |
| Fitness level | 33% | 17% | 13% | 11% | 26% | 54% | 25% | | 39% | 21% | 23% | 28% | 21% | |
| Safety concerns - pavement lighting | 19% | 22% | 28% | 29% | 15% | 9% | 22% | | 12% | 22% | 20% | 20% | 17% | |
| Not a direct route/ inconvenient | 16% | 19% | 33% | 17% | 7% | 14% | 17% | | 19% | 17% | 10% | 14% | 21% | |
| Time constraints (can take too long) | 9% | 22% | 26% | 16% | 18% | 2% | 16% | | 11% | 17% | 10% | 19% | 14% | |
| Safety concerns -close to busy roads | 15% | 13% | 16% | 21% | 7% | 9% | 14% | | 27% | 10% | 22% | 18% | 6% | |
| Travelling with others makes it difficult | 7% | 11% | 9% | 15% | 7% | 5% | 9% | | 3% | 11% | 9% | 9% | 4% | |
| Limits my employment opportunities | 3% | 14% | 16% | 5% | 5% | 9% | 9% | | 3% | 9% | 11% | 7% | 0% | |
| Pavements hard to use -narrow/no kerbs | 8% | 9% | 5% | 8% | 10% | 10% | 9% | | 16% | 6% | 11% | 7% | 5% | |
| Move to alternative transport | 12% | 4% | 8% | 1% | 13% | 11% | 7% | | 7% | 8% | 10% | 9% | 4% | |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to using the car/motorcycle/van

| Barriers to using the car/motorcycle/van | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Fuel costs | 32% | 32% | 42% | 40% | 26% | 20% | 32% | 42% | 32% | 32% | 32% | 34% | 33% | 27% |
| Parking costs | 23% | 25% | 27% | 26% | 22% | 22% | 24% | 25% | 21% | 25% | 24% | 24% | 23% | 22% |
| Congestion on roads | 25% | 21% | 22% | 22% | 23% | 25% | 23% | 27% | 21% | 24% | 20% | 23% | 23% | 27% |
| Insurance costs | 23% | 22% | 31% | 24% | 18% | 20% | 22% | 29% | 22% | 23% | 23% | 24% | 21% | 20% |
| Availability of parking | 21% | 19% | 21% | 20% | 19% | 20% | 19% | 19% | 20% | 20% | 18% | 22% | 16% | 25% |
| Vehicle maintenance cost | 19% | 20% | 30% | 23% | 15% | 12% | 19% | 29% | 21% | 19% | 20% | 20% | 19% | 19% |
| Do not have a driving licence | 11% | 15% | 23% | 14% | 10% | 6% | 12% | 22% | 20% | 11% | 24% | 11% | 6% | 7% |
| Ownerships/availability of this transport | 9% | 10% | 18% | 11% | 6% | 3% | 9% | 19% | 13% | 8% | 13% | 9% | 8% | 11% |
| Time constraints (can take too long) | 4% | 3% | 7% | 4% | 2% | 2% | 4% | 5% | 5% | 3% | 4% | 3% | 3% | 10% |
| Limits my employment opportunities | 1% | 1% | 2% | 2% | 1% | 0% | 1% | 2% | 2% | 1% | 1% | 1% | 1% | 2% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Reasons for reducing use of car/motorcycle/van

| Reasons reduce using the car/motorcycle/van | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | ** LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ * |
| Fuel costs | 51% | 46% | 52% | 53% | 40% | 48% | 51% | | 46% | 49% | 54% | 50% | 47% | 49% |
| Insurance costs | 24% | 25% | 31% | 22% | 19% | 29% | 24% | | 32% | 21% | 31% | 19% | 25% | 34% |
| Parking costs | 24% | 23% | 20% | 23% | 20% | 32% | 25% | | 27% | 24% | 27% | 24% | 17% | 39% |
| Vehicle maintenance costs | 25% | 19% | 25% | 26% | 16% | 20% | 22% | | 26% | 21% | 29% | 18% | 19% | 36% |
| Congestion on roads | 22% | 15% | 7% | 18% | 24% | 26% | 19% | | 14% | 21% | 18% | 22% | 14% | 20% |
| Availability of parking | 14% | 19% | 20% | 15% | 17% | 15% | 16% | | 22% | 15% | 15% | 16% | 19% | 19% |
| Ownerships/availability of this transport | 12% | 10% | 17% | 16% | 4% | 8% | 11% | | 7% | 11% | 14% | 8% | 10% | 20% |
| Environmentally friendly choices | 8% | 11% | 7% | 9% | 14% | 8% | 9% | | 8% | 10% | 10% | 8% | 11% | 15% |
| Do not have a driving licence | 12% | 6% | 21% | 9% | 4% | 3% | 9% | | 6% | 10% | 8% | 9% | 6% | 17% |
| Moving to healthier transport choices | 9% | 9% | 4% | 9% | 13% | 8% | 10% | | 6% | 10% | 13% | 7% | 7% | 13% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to using or leasing an electric vehicle

| Barriers to using or leasing an electric vehicle | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | *LGBT Q+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ ** |
| Cost of purchasing EV | 61% | 53% | 49% | 53% | 60% | 57% | 57% | 57% | 53% | 58% | 52% | 59% | 60% | |
| Lack of access to charging infrastructure | 50% | 40% | 29% | 45% | 49% | 43% | 44% | 38% | 43% | 46% | 36% | 43% | 61% | |
| Not planning to replace current vehicle | 43% | 42% | 36% | 40% | 40% | 54% | 43% | 42% | 38% | 43% | 39% | 45% | 42% | |
| Maintenance cost of EV | 39% | 34% | 40% | 38% | 38% | 25% | 35% | 48% | 38% | 35% | 34% | 36% | 34% | |
| Limited knowledge/ awareness | 15% | 27% | 48% | 24% | 19% | 9% | 23% | 26% | 21% | 23% | 21% | 26% | 19% | |
| Other | 20% | 15% | 2% | 14% | 23% | 25% | 16% | 13% | 24% | 16% | 27% | 15% | 10% | |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to using a connected and autonomous vehicle

| Barriers to using a connected and autonomous vehicle | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Personal security concerns | 53% | 55% | 54% | 54% | 54% | 55% | 54% | 60% | 54% | 55% | 53% | 54% | 56% | 59% |
| Technology fears of using a vehicle not used before | 47% | 47% | 37% | 47% | 50% | 50% | 48% | 43% | 47% | 48% | 45% | 49% | 47% | 44% |
| Lack of information/ awareness | 34% | 50% | 49% | 50% | 37% | 39% | 42% | 54% | 43% | 43% | 43% | 40% | 52% | 37% |
| Potential associated increased costs | 33% | 33% | 32% | 34% | 34% | 32% | 33% | 39% | 35% | 33% | 35% | 34% | 32% | 27% |
| Other | 12% | 7% | 2% | 6% | 11% | 16% | 10% | 5% | 10% | 10% | 11% | 9% | 8% | 13% |
| None of these | 12% | 11% | 10% | 13% | 11% | 11% | 11% | 8% | 12% | 11% | 12% | 10% | 10% | 7% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to car sharing with people

| Barriers to car sharing with people | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Reduced flexibility | 41% | 42% | 35% | 42% | 46% | 39% | 42% | 38% | 37% | 43% | 33% | 40% | 50% | 50% |
| Privacy/ prefer to travel alone | 40% | 41% | 36% | 38% | 43% | 43% | 40% | 48% | 38% | 42% | 37% | 41% | 42% | 39% |
| Personal security concerns | 35% | 44% | 47% | 46% | 34% | 30% | 39% | 39% | 41% | 39% | 42% | 39% | 39% | 44% |
| Increased journey times | 25% | 26% | 33% | 30% | 22% | 18% | 25% | 34% | 23% | 26% | 21% | 27% | 26% | 34% |
| Cleanliness/ hygiene | 20% | 19% | 21% | 21% | 18% | 17% | 19% | 21% | 21% | 19% | 21% | 20% | 17% | 19% |
| Lack of information/ awareness | 19% | 17% | 24% | 21% | 14% | 15% | 18% | 22% | 20% | 18% | 17% | 18% | 19% | 23% |
| Other | 6% | 6% | 1% | 4% | 8% | 11% | 6% | 1% | 8% | 6% | 8% | 6% | 5% | 3% |
| None of these | 15% | 12% | 7% | 10% | 15% | 21% | 13% | 12% | 15% | 13% | 17% | 12% | 10% | 8% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.3 TE Overview – Future Travel Behaviours and Choices: Barriers to Use

## Barriers to using a car club/car hiring

| Barriers to using a car club/ car hiring | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Prefer to own my vehicle | 49% | 47% | 32% | 43% | 53% | 59% | 49% | 42% | 38% | 52% | 37% | 49% | 53% | 54% |
| Cost associated with hiring a vehicle | 32% | 34% | 36% | 35% | 30% | 30% | 33% | 41% | 34% | 33% | 36% | 33% | 34% | 30% |
| Inconvenient pick up/ drop off locations | 33% | 29% | 22% | 30% | 34% | 36% | 31% | 34% | 28% | 33% | 25% | 31% | 36% | 43% |
| Personal security fears | 24% | 28% | 43% | 30% | 19% | 16% | 26% | 30% | 31% | 24% | 28% | 26% | 26% | 32% |
| Lack of information/ awareness | 25% | 26% | 33% | 30% | 21% | 19% | 25% | 34% | 26% | 25% | 25% | 25% | 29% | 24% |
| Technology fears using vehicle not used before | 12% | 13% | 20% | 14% | 8% | 11% | 12% | 16% | 15% | 12% | 13% | 11% | 14% | 16% |
| Cleanliness of the vehicle | 12% | 11% | 12% | 12% | 11% | 12% | 11% | 16% | 13% | 11% | 12% | 12% | 10% | 11% |
| Other | 8% | 8% | 1% | 4% | 12% | 13% | 7% | 7% | 10% | 7% | 10% | 8% | 6% | 2% |
| None of these | 10% | 10% | 10% | 8% | 10% | 13% | 10% | 9% | 11% | 9% | 15% | 9% | 5% | 6% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.0 Appendix

## 7.4 TE Overview – Future travel behaviour and choices: Encouraging Future Use

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Encourage Cycling in the future

| Ways to encourage cycling | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Segregated cycle lanes (from road traffic) | 21% | 19% | 18% | 22% | 24% | 12% | 19% | 27% | 15% | 22% | 14% | 20% | 22% | 29% |
| Well-lit cycle lanes | 18% | 20% | 23% | 23% | 19% | 9% | 18% | 27% | 17% | 20% | 16% | 19% | 22% | 20% |
| well-maintained cycle lanes | 20% | 17% | 15% | 20% | 24% | 11% | 18% | 22% | 14% | 20% | 13% | 19% | 20% | 23% |
| Well-connected and continuous cycle route | 19% | 17% | 15% | 19% | 22% | 12% | 17% | 24% | 14% | 19% | 12% | 18% | 22% | 22% |
| Cycle routes that go near destination/ other transport modes | 14% | 14% | 13% | 17% | 17% | 7% | 14% | 22% | 12% | 16% | 10% | 14% | 19% | 16% |
| Secure cycle storage at other destinations | 15% | 12% | 17% | 14% | 14% | 8% | 13% | 24% | 13% | 14% | 12% | 15% | 14% | 20% |
| Secure cycle storage at work location | 13% | 13% | 25% | 16% | 9% | 1% | 12% | 27% | 13% | 12% | 10% | 13% | 15% | 15% |
| Cycle to work scheme | 13% | 11% | 25% | 17% | 6% | 1% | 11% | 24% | 12% | 12% | 9% | 12% | 14% | 20% |
| Secure cycle storage near home | 11% | 11% | 22% | 15% | 7% | 1% | 10% | 23% | 11% | 11% | 10% | 12% | 12% | 15% |
| Showers at work location | 9% | 10% | 18% | 12% | 7% | 1% | 9% | 15% | 8% | 9% | 6% | 10% | 13% | 10% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Encourage use of Public Transport - Bus

| Ways to encourage use of public transport -Bus | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Reduced ticket cost | 48% | 51% | 56% | 57% | 48% | 35% | 49% | 56% | 46% | 51% | 50% | 50% | 52% | 45% |
| More frequent services | 46% | 48% | 46% | 46% | 47% | 47% | 46% | 52% | 44% | 48% | 45% | 48% | 47% | 45% |
| On-time and reliable services | 41% | 43% | 40% | 41% | 42% | 44% | 41% | 44% | 38% | 43% | 41% | 41% | 42% | 44% |
| Improved stations/ stop facilities | 26% | 28% | 34% | 30% | 24% | 20% | 26% | 34% | 27% | 26% | 26% | 26% | 26% | 29% |
| Travel pass scheme | 28% | 25% | 42% | 24% | 21% | 24% | 26% | 36% | 26% | 26% | 27% | 26% | 25% | 28% |
| Less busy services | 21% | 23% | 33% | 24% | 18% | 15% | 21% | 33% | 25% | 21% | 24% | 21% | 23% | 22% |
| Improve cleanliness on-board | 20% | 23% | 29% | 24% | 18% | 15% | 21% | 30% | 23% | 21% | 22% | 20% | 21% | 25% |
| Improved safety on-board | 19% | 21% | 30% | 22% | 16% | 15% | 19% | 27% | 22% | 19% | 21% | 20% | 18% | 25% |
| Combined tickets (e.g. for bus and train) | 23% | 21% | 25% | 21% | 23% | 20% | 21% | 30% | 22% | 22% | 23% | 22% | 20% | 22% |
| Tap on/tap off payments | 18% | 19% | 22% | 17% | 20% | 14% | 18% | 24% | 17% | 19% | 18% | 18% | 18% | 18% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Encourage use of Public Transport - Train

| Ways to encourage use of public transport -Train | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Reduced ticket cost | 57% | 59% | 58% | 61% | 59% | 52% | 58% | 62% | 53% | 60% | 52% | 60% | 60% | 61% |
| More frequent services | 32% | 36% | 41% | 36% | 33% | 28% | 34% | 38% | 32% | 35% | 32% | 34% | 36% | 40% |
| On-time and reliable services | 35% | 35% | 36% | 37% | 34% | 32% | 34% | 42% | 32% | 35% | 32% | 34% | 37% | 42% |
| Improved stations/ stop facilities | 26% | 26% | 35% | 29% | 22% | 20% | 25% | 34% | 26% | 26% | 24% | 24% | 26% | 36% |
| Travel pass scheme | 25% | 26% | 37% | 23% | 21% | 23% | 25% | 34% | 25% | 25% | 26% | 25% | 25% | 24% |
| Less busy services | 22% | 24% | 32% | 25% | 19% | 16% | 22% | 33% | 27% | 21% | 23% | 22% | 24% | 24% |
| Improve cleanliness on-board | 19% | 22% | 30% | 22% | 17% | 15% | 20% | 31% | 22% | 20% | 20% | 19% | 21% | 26% |
| Improved safety on-board | 20% | 21% | 32% | 22% | 16% | 15% | 20% | 28% | 22% | 19% | 22% | 20% | 18% | 27% |
| Combined tickets (e.g. for bus and train) | 23% | 20% | 27% | 20% | 22% | 19% | 21% | 31% | 22% | 21% | 24% | 22% | 20% | 20% |
| Tap on/tap off payments | 17% | 18% | 21% | 17% | 18% | 15% | 17% | 21% | 16% | 18% | 17% | 17% | 19% | 17% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Encourage use of Public Transport - Underground

| Ways to encourage use of public transport -Underground | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Reduced ticket cost | 44% | 44% | 45% | 48% | 43% | 38% | 45% | 40% | 39% | 46% | 41% | 46% | 43% | 48% |
| More frequent services | 26% | 28% | 34% | 27% | 24% | 23% | 27% | 28% | 27% | 27% | 27% | 26% | 27% | 26% |
| On-time and reliable services | 26% | 28% | 32% | 29% | 24% | 24% | 27% | 28% | 25% | 27% | 26% | 26% | 25% | 33% |
| Improved stations/ stop facilities | 22% | 22% | 29% | 26% | 19% | 15% | 22% | 27% | 25% | 21% | 23% | 20% | 21% | 28% |
| Travel pass scheme | 23% | 23% | 33% | 20% | 19% | 22% | 23% | 22% | 22% | 23% | 24% | 23% | 21% | 21% |
| Less busy services | 22% | 23% | 31% | 24% | 19% | 16% | 22% | 25% | 25% | 21% | 22% | 22% | 21% | 27% |
| Improve cleanliness on-board | 19% | 20% | 28% | 21% | 16% | 12% | 19% | 22% | 20% | 19% | 19% | 18% | 19% | 28% |
| Improved safety on-board | 19% | 21% | 30% | 21% | 16% | 14% | 19% | 25% | 21% | 19% | 22% | 19% | 16% | 24% |
| Combined tickets (e.g. for bus and train) | 21% | 17% | 21% | 19% | 19% | 17% | 18% | 22% | 20% | 18% | 20% | 20% | 15% | 18% |
| Tap on/tap off payments | 15% | 15% | 17% | 14% | 16% | 14% | 15% | 17% | 13% | 15% | 14% | 15% | 14% | 16% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Encourage Walking

| Ways to encourage walking | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Well-lit walking routes | 27% | 40% | 38% | 38% | 33% | 23% | 32% | 45% | 35% | 33% | 32% | 34% | 34% | 31% |
| well-maintained walking routes | 31% | 31% | 25% | 28% | 35% | 36% | 31% | 33% | 27% | 33% | 29% | 32% | 29% | 27% |
| Wider footways | 27% | 29% | 38% | 34% | 22% | 20% | 27% | 37% | 30% | 27% | 27% | 28% | 29% | 26% |
| Continuous pavements (without kerbs blocking routes, or routes ending) | 25% | 27% | 31% | 29% | 23% | 20% | 25% | 33% | 26% | 26% | 22% | 25% | 28% | 28% |
| More zebra or signalised crossings | 20% | 23% | 39% | 29% | 13% | 9% | 21% | 34% | 25% | 21% | 23% | 20% | 21% | 29% |
| Quieter routes near lower traffic roads | 18% | 21% | 24% | 19% | 21% | 14% | 19% | 25% | 19% | 20% | 20% | 17% | 21% | 26% |
| Walking routes that go near destination/ other transport modes | 14% | 15% | 16% | 16% | 13% | 13% | 14% | 19% | 12% | 15% | 14% | 13% | 15% | 15% |
| Flexible work hours allowing more time to travel by this mode | 6% | 9% | 11% | 13% | 4% | 1% | 8% | 7% | 7% | 8% | 5% | 7% | 9% | 14% |
| Other | 4% | 3% | 1% | 2% | 6% | 6% | 4% | 2% | 5% | 4% | 5% | 4% | 3% | 2% |
| None of these | 31% | 26% | 10% | 21% | 36% | 44% | 29% | 20% | 31% | 28% | 32% | 29% | 25% | 21% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Concerns about the Environment and Society

| Environmental and social issue concerns | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Deforestation/loss of habitat | 84% | 87% | 77% | 84% | 89% | 88% | 86% | 84% | 84% | 86% | 81% | 87% | 87% | 84% |
| The use of single-use plastic | 81% | 84% | 75% | 80% | 86% | 89% | 83% | 85% | 80% | 84% | 80% | 84% | 83% | 85% |
| Biodiversity/species extinction | 77% | 80% | 73% | 79% | 82% | 78% | 79% | 78% | 78% | 79% | 75% | 80% | 80% | 85% |
| Climate change/ global warming | 79% | 85% | 81% | 84% | 83% | 80% | 82% | 86% | 81% | 83% | 79% | 83% | 85% | 86% |
| Racial injustice | 67% | 77% | 79% | 76% | 70% | 63% | 71% | 80% | 75% | 72% | 68% | 73% | 75% | 77% |
| Social inequality | 68% | 76% | 76% | 79% | 71% | 62% | 72% | 82% | 75% | 72% | 68% | 74% | 76% | 76% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Responses to statements about the Environment

| Agreement with statements about climate change | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero-sexual | LGBTQ+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Central Government should be doing far more to help the environment | 70% | 78% | 67% | 79% | 75% | 73% | 74% | 80% | 76% | 75% | 72% | 75% | 77% | 77% |
| Large companies should be doing far more to help the environment | 70% | 76% | 68% | 78% | 72% | 71% | 73% | 76% | 77% | 72% | 70% | 74% | 76% | 76% |
| Local councils should be doing far more to help the environment | 65% | 74% | 66% | 75% | 68% | 69% | 70% | 77% | 74% | 70% | 68% | 71% | 73% | 77% |
| Sustainable travel is really important to me (e.g. using public transport, staying in eco-friendly accommodations) | 43% | 42% | 45% | 49% | 39% | 37% | 42% | 47% | 44% | 42% | 42% | 43% | 45% | 50% |
| I don't want to think about sustainability or the environment during my leisure time | 32% | 27% | 33% | 32% | 26% | 28% | 29% | 34% | 32% | 28% | 30% | 30% | 30% | 31% |
| There's too much concern with the environment and global warming | 30% | 22% | 26% | 30% | 21% | 27% | 26% | 17% | 27% | 25% | 24% | 26% | 26% | 33% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Personal Behaviours to support the environment [1]

| Personal behaviours carried out to help the environment | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Recycling items rather than throwing them away | 65% | 73% | 44% | 65% | 78% | 86% | 70% | 66% | 68% | 71% | 67% | 69% | 71% | 66% |
| Switching off the heating/electricity when you go out | 59% | 67% | 46% | 59% | 71% | 73% | 63% | 63% | 64% | 64% | 62% | 65% | 61% | 63% |
| Re-using items like empty bottles, jars, envelopes or paper | 52% | 62% | 38% | 52% | 65% | 71% | 58% | 58% | 58% | 58% | 56% | 58% | 58% | 47% |
| Cutting down on plastic use | 51% | 61% | 36% | 52% | 65% | 67% | 57% | 53% | 52% | 58% | 55% | 57% | 57% | 50% |
| Reduce water usage | 48% | 53% | 30% | 45% | 58% | 65% | 51% | 43% | 51% | 51% | 54% | 52% | 48% | 43% |
| Making my garden more bee/nature friendly | 40% | 46% | 22% | 38% | 51% | 57% | 43% | 41% | 44% | 44% | 40% | 44% | 45% | 34% |
| Avoiding buying products with too much packaging | 38% | 47% | 26% | 39% | 52% | 49% | 43% | 43% | 43% | 43% | 41% | 42% | 44% | 40% |
| Buying locally produced food/produce | 35% | 40% | 24% | 30% | 45% | 50% | 38% | 27% | 37% | 38% | 35% | 39% | 33% | 43% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Personal Behaviours to support the environment [2]

| Personal behaviours carried out to help the environment | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero -sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Taking sustainable transport options, such as public transport, cycling, and walking | 33% | 33% | 27% | 30% | 38% | 37% | 33% | 33% | 33% | 34% | 36% | 33% | 29% | 38% |
| Limiting your meat consumption | 23% | 34% | 22% | 25% | 34% | 33% | 29% | 31% | 29% | 29% | 26% | 30% | 30% | 23% |
| Switching to renewable energy suppliers | 26% | 22% | 16% | 24% | 26% | 27% | 23% | 25% | 24% | 24% | 22% | 24% | 27% | 31% |
| Flying less or flying shorter distances | 20% | 22% | 18% | 16% | 24% | 28% | 21% | 24% | 23% | 21% | 21% | 23% | 22% | 15% |
| Installing new energy technologies (e.g. solar panels, heat pumps) | 16% | 12% | 11% | 13% | 14% | 18% | 14% | 14% | 14% | 14% | 10% | 14% | 15% | 22% |
| Posting about global warming on social media | 6% | 7% | 9% | 9% | 4% | 4% | 6% | 15% | 9% | 6% | 6% | 7% | 7% | 10% |
| Contacting local politicians | 7% | 6% | 6% | 6% | 6% | 8% | 6% | 8% | 7% | 6% | 6% | 7% | 4% | 9% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Perception of scenarios if introduced in local area

| How welcoming are the following scenarios? | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero-sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Creating quieter, healthier neighbourhoods allowing more space for people and reducing high levels of traffic | 57% | 61% | 60% | 64% | 57% | 54% | 59% | 64% | 58% | 60% | 54% | 61% | 63% | 61% |
| Improving quality/width of footways by reducing space for cars | 46% | 49% | 49% | 55% | 44% | 41% | 48% | 49% | 44% | 49% | 43% | 49% | 52% | 49% |
| Introducing clean air zones, and monetary charges for vehicles producing higher emissions in these areas | 47% | 42% | 46% | 46% | 42% | 42% | 44% | 49% | 44% | 44% | 42% | 45% | 44% | 60% |
| Introducing segregated cycle lanes by reducing on-street parking | 43% | 45% | 45% | 50% | 43% | 35% | 44% | 48% | 41% | 46% | 39% | 44% | 50% | 52% |
| Restricting the level of vehicle travel in heavily congested areas via access restrictions | 42% | 39% | 41% | 45% | 40% | 33% | 41% | 40% | 40% | 41% | 39% | 42% | 43% | 45% |
| Limiting vehicle access to town centres/shopping areas | 36% | 32% | 28% | 37% | 35% | 32% | 34% | 35% | 32% | 34% | 35% | 34% | 35% | 42% |
| Workplace car park charging to reduce level of employees travelling to work by car | 27% | 23% | 34% | 31% | 20% | 16% | 25% | 33% | 24% | 26% | 24% | 25% | 29% | 34% |
| Introduce a charge to drive through/to certain areas | 27% | 20% | 28% | 28% | 21% | 16% | 23% | 27% | 24% | 24% | 23% | 24% | 23% | 37% |
| Increased car park charging at destinations | 24% | 19% | 33% | 25% | 17% | 13% | 21% | 29% | 21% | 22% | 19% | 22% | 23% | 27% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Ideas to encourage more sustainable transport choices

| Ideas to encourage more sustainable transport choices | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero-sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Increasing the number of public transport routes and services | 74% | 77% | 65% | 75% | 78% | 83% | 76% | 77% | 73% | 78% | 70% | 77% | 78% | 79% |
| Subsidising public transport tickets/fares to reduce the cost when travelling | 66% | 67% | 56% | 68% | 69% | 71% | 66% | 69% | 63% | 69% | 61% | 68% | 70% | 74% |
| Investing in infrastructure that makes it easier to walk and cycle, such as footpaths, cycle paths, and cycle | 61% | 63% | 52% | 67% | 65% | 61% | 62% | 70% | 60% | 64% | 58% | 63% | 65% | 70% |
| Providing tax breaks for people who use public transport, cycle, or walk | 59% | 62% | 60% | 67% | 58% | 52% | 60% | 64% | 60% | 61% | 54% | 62% | 65% | 63% |
| Introducing emission charges for vehicles (i.e. higher emitting vehicles pay more) | 45% | 38% | 41% | 41% | 41% | 40% | 41% | 41% | 45% | 40% | 40% | 44% | 40% | 52% |
| Introducing a congestion charge based on busyness of roads for vehicles | 34% | 29% | 37% | 35% | 29% | 25% | 31% | 35% | 34% | 31% | 31% | 33% | 32% | 41% |
| Making it more expensive to park vehicles in city centres | 30% | 26% | 35% | 31% | 25% | 22% | 28% | 29% | 29% | 28% | 26% | 28% | 31% | 39% |
| Making it more expensive to park vehicles at work | 23% | 18% | 30% | 24% | 17% | 11% | 20% | 24% | 25% | 19% | 20% | 19% | 22% | 30% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Scenarios for Road Charge Implementation

| Scenarios that road charging should be based on | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero-sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Emissions from their vehicle | 46% | 39% | 47% | 41% | 41% | 41% | 42% | 47% | 42% | 43% | 36% | 44% | 45% | 52% |
| Type of vehicle used | 36% | 32% | 29% | 33% | 34% | 38% | 34% | 32% | 33% | 34% | 31% | 35% | 35% | 35% |
| The use of certain roads (e.g. most congested roads or town centres) | 32% | 27% | 28% | 29% | 30% | 29% | 29% | 35% | 30% | 29% | 28% | 30% | 32% | 32% |
| Time of day when travelling | 32% | 26% | 26% | 26% | 32% | 31% | 30% | 23% | 30% | 29% | 27% | 31% | 31% | 36% |
| Annual mileage of the vehicle | 17% | 11% | 10% | 12% | 15% | 18% | 14% | 13% | 14% | 14% | 15% | 13% | 14% | 17% |
| Other | 5% | 3% | 0% | 2% | 6% | 6% | 4% | 4% | 4% | 4% | 3% | 4% | 3% | 3% |
| Don't know/not sure | 19% | 25% | 16% | 22% | 24% | 25% | 22% | 19% | 25% | 21% | 28% | 21% | 15% | 15% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Priorities for allocating additional funds

| Top priorities for funding | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero-sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Improving condition of road | 53% | 60% | 41% | 52% | 62% | 71% | 58% | 50% | 53% | 59% | 50% | 58% | 60% | 54% |
| Increasing number of available public transport services | 52% | 51% | 47% | 46% | 54% | 60% | 51% | 57% | 50% | 53% | 51% | 50% | 55% | 57% |
| Subsidised ticket cost for local bus services | 42% | 42% | 39% | 44% | 43% | 39% | 42% | 42% | 42% | 43% | 46% | 44% | 37% | 38% |
| Improving footway quality | 40% | 44% | 45% | 44% | 37% | 43% | 43% | 34% | 44% | 41% | 45% | 43% | 38% | 38% |
| Improving the number and quality of cycleways (e.g. increase the number of segregated cycleways) | 21% | 20% | 21% | 23% | 21% | 15% | 20% | 21% | 19% | 21% | 17% | 21% | 23% | 24% |
| Increasing the accessibility to transport services for all users | 17% | 21% | 12% | 16% | 22% | 25% | 19% | 16% | 17% | 20% | 18% | 20% | 20% | 13% |
| Widely-available EV charging points | 22% | 15% | 26% | 19% | 17% | 13% | 18% | 22% | 20% | 18% | 16% | 18% | 24% | 25% |
| Specific named transport improvement projects, for example a new railway station | 21% | 13% | 27% | 20% | 13% | 9% | 17% | 18% | 16% | 17% | 14% | 17% | 17% | 28% |
| Not directly for transport, but towards increasing general funding for local councils | 11% | 12% | 13% | 13% | 11% | 8% | 11% | 17% | 11% | 12% | 9% | 12% | 14% | 14% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Priorities for allocating additional funds

| Top fairest ways of addressing funding gap | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero-sexual | LGBTQ + | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Implement a road user charge based on size and weight of vehicle | 39% | 31% | 30% | 31% | 37% | 42% | 36% | 30% | 31% | 37% | 32% | 38% | 34% | 40% |
| Implement a road user charge based on vehicle emission level | 37% | 31% | 34% | 32% | 35% | 34% | 34% | 33% | 38% | 33% | 32% | 34% | 38% | 46% |
| Increase taxes on other types of vehicles, such as electric vehicles and hybrid vehicles | 36% | 29% | 26% | 27% | 35% | 41% | 32% | 31% | 30% | 33% | 28% | 31% | 39% | 34% |
| Allocate a portion of existing tax revenue to be used for transport infrastructure | 27% | 32% | 23% | 29% | 31% | 33% | 30% | 28% | 26% | 31% | 23% | 30% | 33% | 33% |
| Apply a local tax to those visiting the country or area | 21% | 19% | 24% | 23% | 17% | 16% | 20% | 21% | 21% | 20% | 22% | 18% | 20% | 23% |
| Implement a road user charge to access certain areas | 20% | 17% | 24% | 19% | 18% | 14% | 19% | 21% | 17% | 19% | 18% | 18% | 21% | 25% |
| Implement a road user charge at certain times of day/week | 20% | 15% | 19% | 15% | 17% | 20% | 18% | 17% | 16% | 18% | 14% | 19% | 19% | 18% |
| Seek additional funding from private companies | 16% | 22% | 18% | 23% | 17% | 18% | 19% | 20% | 18% | 20% | 17% | 21% | 20% | 18% |
| Increase income taxes or fees | 13% | 9% | 14% | 11% | 12% | 9% | 11% | 18% | 12% | 11% | 9% | 11% | 14% | 12% |
| Additional council tax | 13% | 9% | 21% | 14% | 5% | 6% | 11% | 13% | 11% | 10% | 11% | 11% | 10% | 18% |
| Reduction in Government spending on transport | 5% | 7% | 9% | 7% | 5% | 4% | 6% | 3% | 5% | 6% | 5% | 7% | 7% | 5% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

# 7.4 TE Overview – Future Travel Behaviours and Choices: Encouraging Future Use

## Messaging for behaviour change

| Chosen form of messaging | Gender | | Age | | | | Sexual orientation | | Disability | | Income bands | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Male | Female | 16-29 | 30-49 | 50-69 | 70+ | Hetero-sexual | LGBTQ+ | Yes | No | Under £25k | £25K-£54,999 | £55K-£99,999 | £100K+ |
| Personal health benefits such as losing weight | 49% | 52% | 47% | 49% | 51% | 55% | 51% | 45% | 44% | 52% | 48% | 48% | 53% | 57% |
| Environmental benefits such as improving the local air quality | 29% | 24% | 31% | 25% | 25% | 27% | 26% | 28% | 32% | 25% | 26% | 27% | 25% | 30% |
| Personal finances benefits/cost savings such as reducing cost associated with travel | 22% | 24% | 22% | 26% | 23% | 18% | 23% | 27% | 24% | 23% | 25% | 25% | 22% | 13% |

Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30