# Transport East Travel & Behaviour Survey Report

# Executive Summary

# 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 However, with the 2021 Census being undertaken during the Covid-19 pandemic and the 2011 data now outdated, there is a need to supplement this with a travel and behaviour survey.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

# Fieldwork Summary

## Distribution of responses and % of total responses

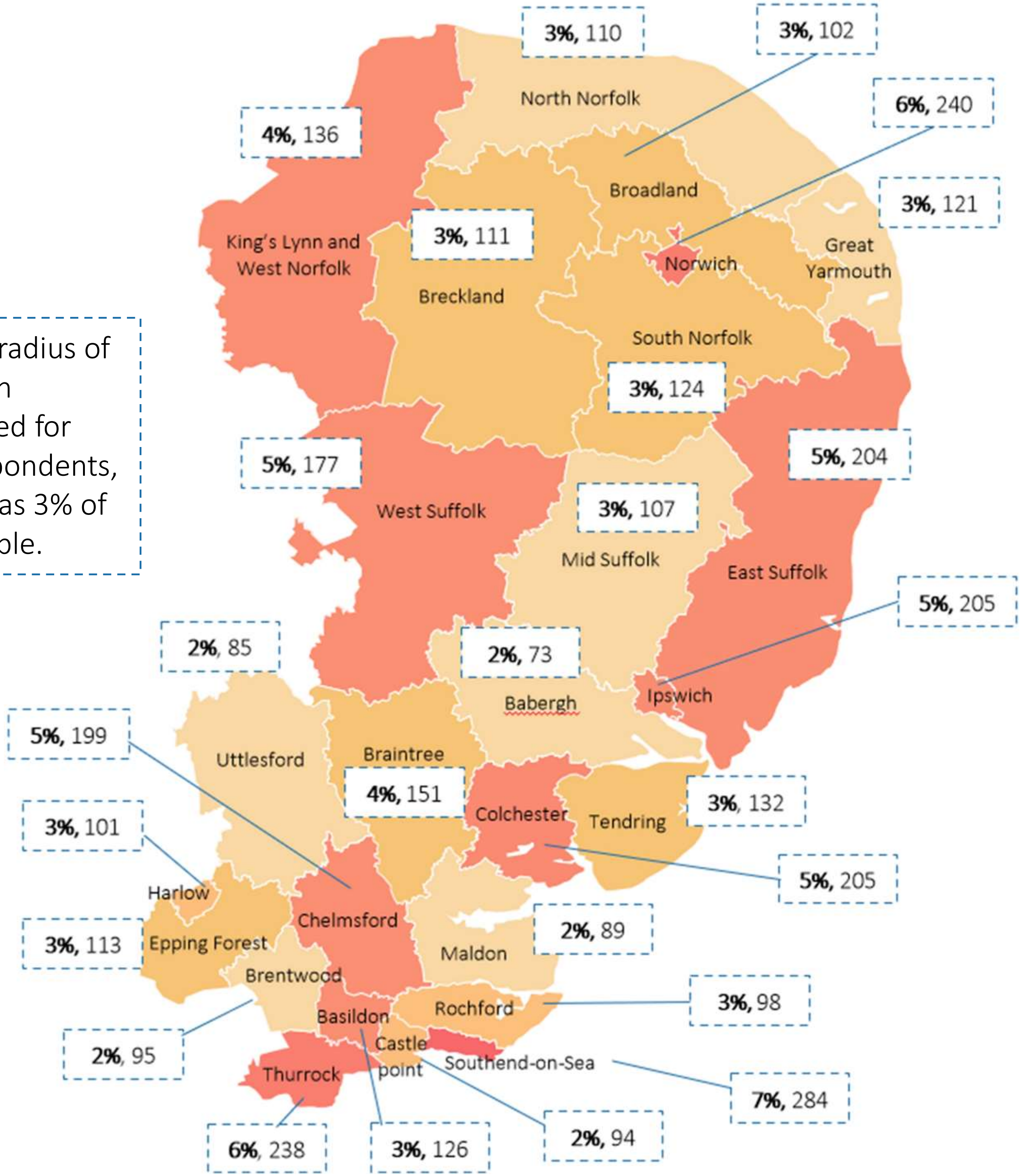
The map to the right shows the number of responses and response rates across the region. These were controlled by target quotas based on the Census 2021, to minimise bias of any one district or authority. The numbers are the sum of both the panel and open link responses.

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).

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

# Fieldwork Summary

## Travel Behaviours

Of those surveyed, at the time of asking, 'car' (63%) and 'walking' (64%) were the most used modes of transport across all journey purposes.

Buses are used more by lower-income households (under £25k), and influenced by age, with those aged 16-29 and 70+ with higher use proportions.

Rail travel is more prevalent among 16-49 year olds, and used most often for travel to work.

Cycling is more limited, with 9% reporting to travel in this way.

People choose transport based on convenience, and how well it fits their needs/speed of getting to a destination. Environmental reasons are one of the main reasons for walking or cycling.

The most common trips include grocery/food shopping and commuting to work, which closely aligns with the National Travel Survey where shopping and commuting were most common trips in 2022. Visiting friends or relatives, or leisure/entertainment are also common purposes.

## 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

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.

# Insights Summary

## 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 time (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.

## 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 - 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 is the safety. 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%).

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

# Insights Summary

## 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 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 car use for people 70+. Fuel and insurance costs impact those under 50 years-old more.

### Electric Vehicles (EVs)

Adoption of EVs is low, with only a small fraction (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)

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 leading barrier to car clubs, though less of a concern among people under 30.

# Insights Summary

## Public Transport and DRT

### Electric Vehicles (EVs)

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, except for 70+ who benefit from the concessionary passes. A travel pass scheme was noted by 16-29 year olds to have a great appeal.

Infrequent and unreliable services also limit future use, making it difficult 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 usage in the future, and for 48% of non-train users this is the top barrier for not using the train. Secondary to this are improving facilities and minimising the crowding on services as particularly noted by those aged 16-29.

### Demand-responsive Transport (DRT)

Only 26% are aware of DRT, reflecting of 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 in the future is limited across the all groups.

# Insights Summary

## Environment

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

There is a high environmental concern, more so than societal. Concern 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.

Many respondents agreed that government, councils 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 most welcomed.

With sustainable travel behaviour, 68% think it is important, however when asked about what they personally care about, 43% agree that sustainable travel is important to them, and only 33% think they are currently travelling sustainably.

## 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.

The top priorities for funding in the future were, improving road conditions, the provision of public transport and subsidising the costs of local bus services.

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 – although less welcomed by EV users and those younger than 30. Reducing Government spending on transport was not a preferred scenario by anyone.

## Future Messaging

When asked about what type of messaging influence behaviour change from car to cycling or walking.  A focus on spersonal 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.