TRANSPORTEAST

Transport East Travel & Behaviour Survey Report

ESSEX

Contents

1.0 Introduction

1.1 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 However, with the 2021 Census being undertaken during the Covid-19 pandemic and the 2011 data now outdated, there is a need to supplement this with a travel and behaviour survey. In addition, data on trip patterns and attributes and perceptions are limited, relying mostly on the National Travel Survey for aspects such as journey purpose by mode.

The purpose of this study is to provide analysis and insight that will be used alongside wider datasets, evidence and insights to inform the development of strategies, policies and planning in the East. This will be provided at a regional and local transport authority level.

Objectives

The study will help to address and inform the following objectives:

- To understand current travel patterns, including journey purpose, demographics, and place of residence, as well as 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 (LTA) 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*

A 25-minute online survey was carried out between March 18th to April 17th 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 who travel in. The survey used a panel and an open link, which was shared on LTA websites.

In Essex, 1,488 responses were captured, including 1,244 panel link responses and 244 open link responses.

Respondents were recruited based on quotas that were reflective of the proportion of residents in each district and LTA. This was taken from the Census 2021 data.

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

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

1.2 Fieldwork Summary

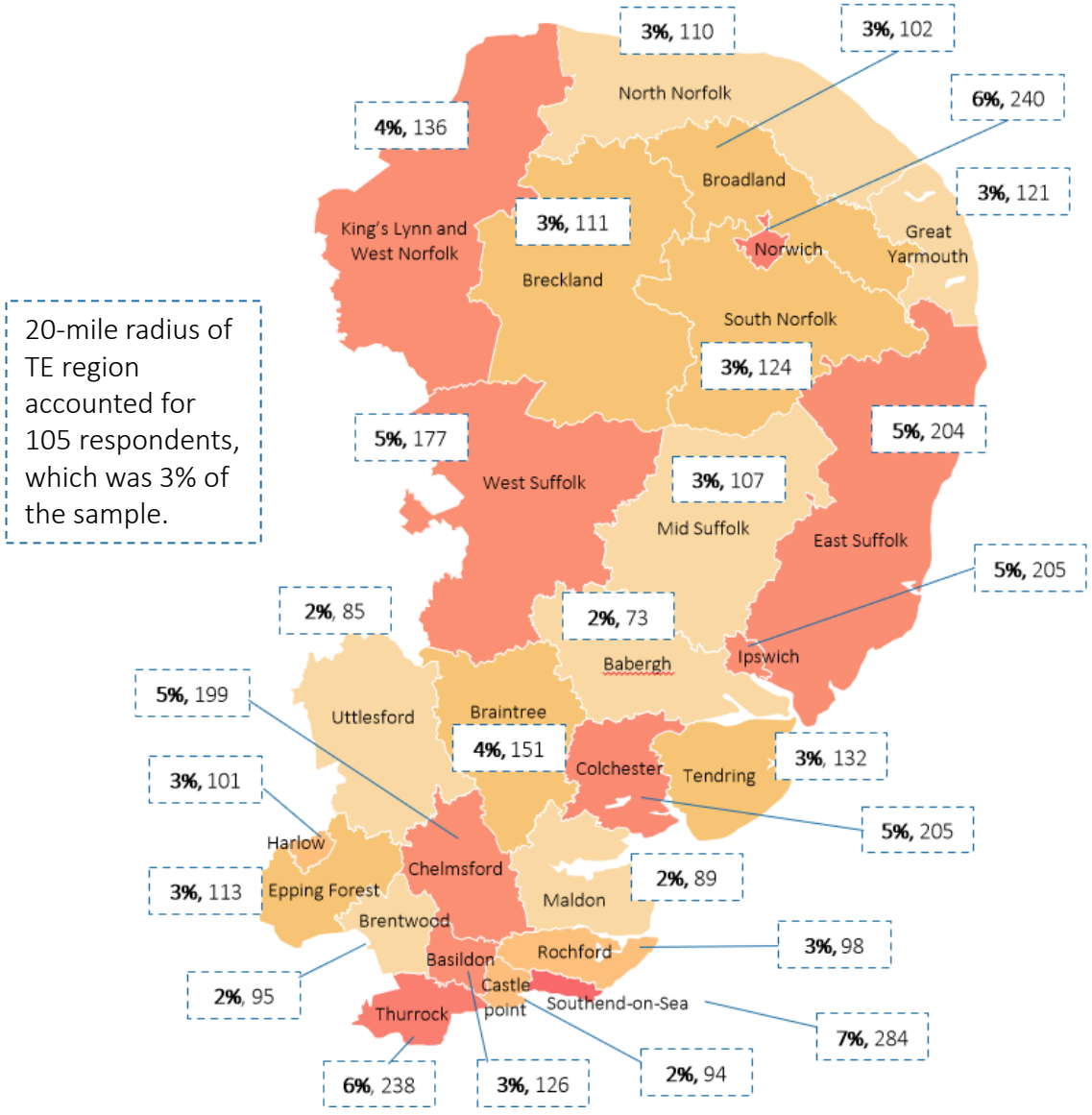
Distribution of responses and % of total responses

To assess the validity of the findings and how they were distributed across the TE region, the map shows the number of responses and response rates. These were controlled by target quotas based on the Census 2021, to minimise bias of any one district or authority in the overall results.

We received 1,488 responses from Essex, accounting for 39% of the total responses, the highest number of responses across the LTAs. This was a 14% increase on the initial target of 1,305 responses. More women than men and those aged 30-39 answered the surveys than other demographics in Essex.

We did not meet the target number of responses for two Essex districts, but still secured a good level of response from these areas:

- Rochford – target of 134; achieved 98 responses (73% of the target)
- Brentwood – target of 102; achieved 95 responses (93% of the target)



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

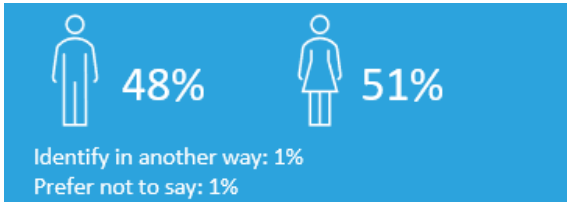
2.0 Essex

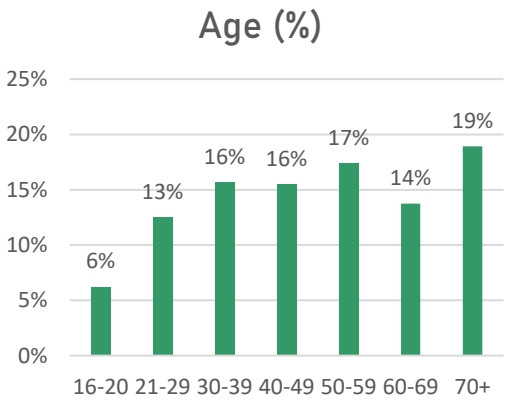
2.1 Demographics of Survey Results

Demographics were not controlled for when recruiting respondents to maximise responses. Therefore, 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

2.1 Demographics of Survey Results for Essex

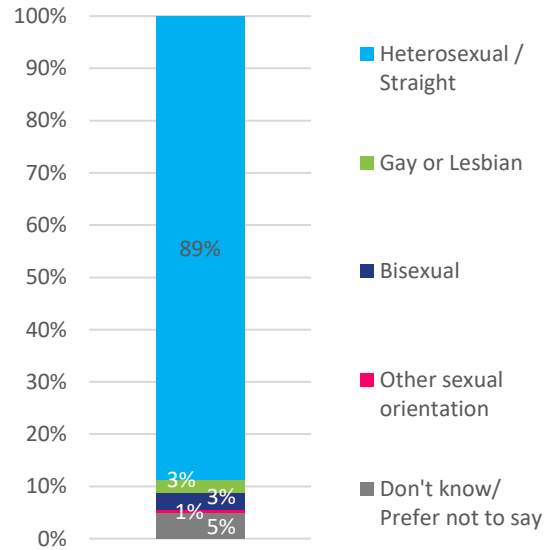
Age & Gender





Like other Transport East regions, the gender distribution in Essex is approximately equal between men and women. 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+.

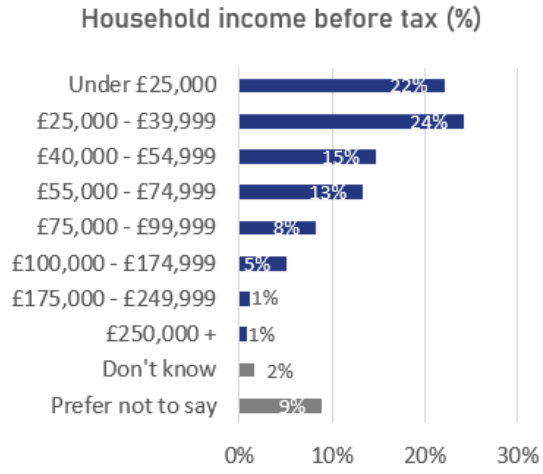
Sexual Orientation



Household/living status

Average household size
2.7

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

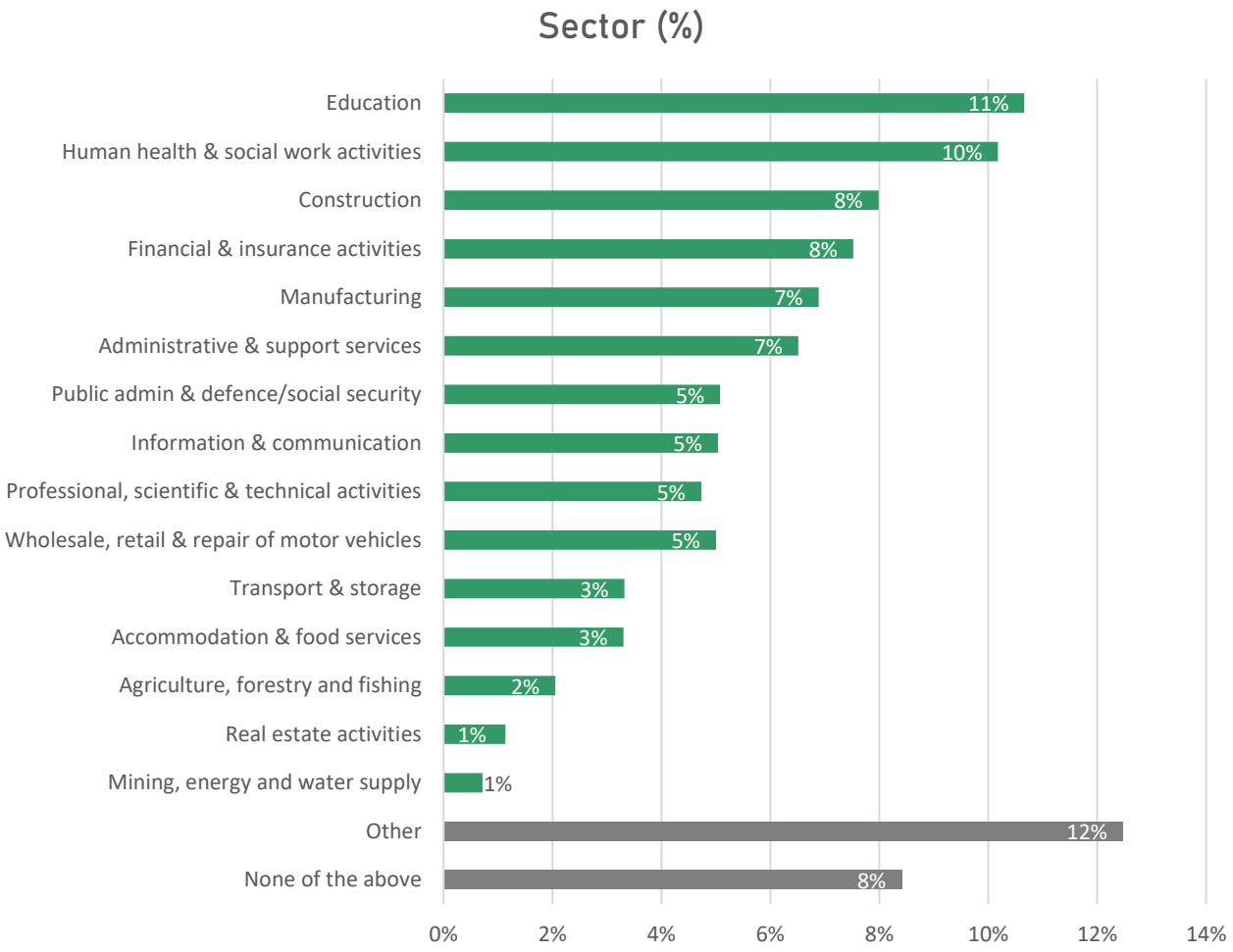


18% of respondents in Essex live alone. A further 72% live in a household of 2-4 people (including themselves), with household size averaging 2.7 people. They are most likely to live with their partner (58%), followed by children at 31%.

The average household income is £47,000, with the majority earning less than £55,000. This is higher than the ONS average of £33,200 (ONS, 2022).

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

2.1 Demographics of Survey Results for Essex



Employment/study status

65% currently work

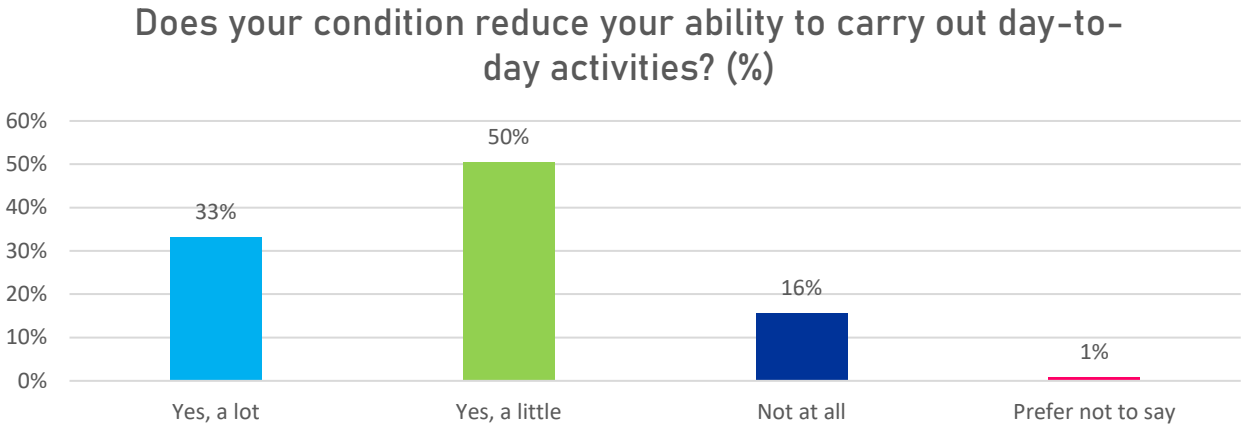
65% of Essex respondents are currently working in a typical week. This is higher than in the Census 2021, where 56% were employed in the week of filling in the survey. Of those not working, most are retired (72%), while the remaining 28% are studying, carers, or unable to work due to sickness or disability.

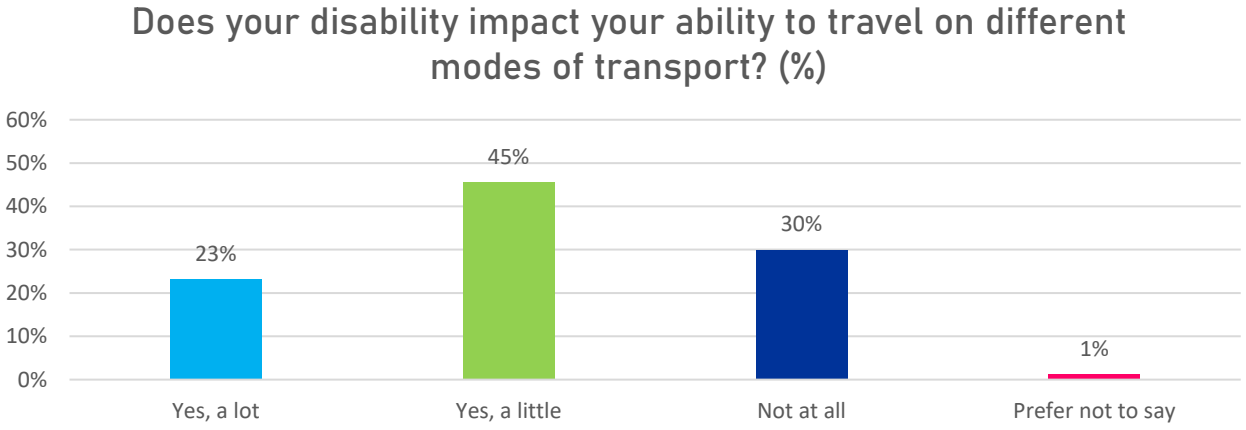
Respondents work in various sectors, with education and human health & social work activities being the top 2, at 11% and 10% respectively. Construction and financial activities are joint third at 8%.

Those who reported 'other' (12%), were required to input a response for their employment. This included those working in horticulture and hospitality.

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

2.1 Demographics of Survey Results for Essex





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

Disability

20%

Have long-term physical/mental health conditions or disability

Among respondents with physical or mental health conditions/illness, 30% reported difficulty in mobility, and 19% with mental health issues (40% for aged 21-39).

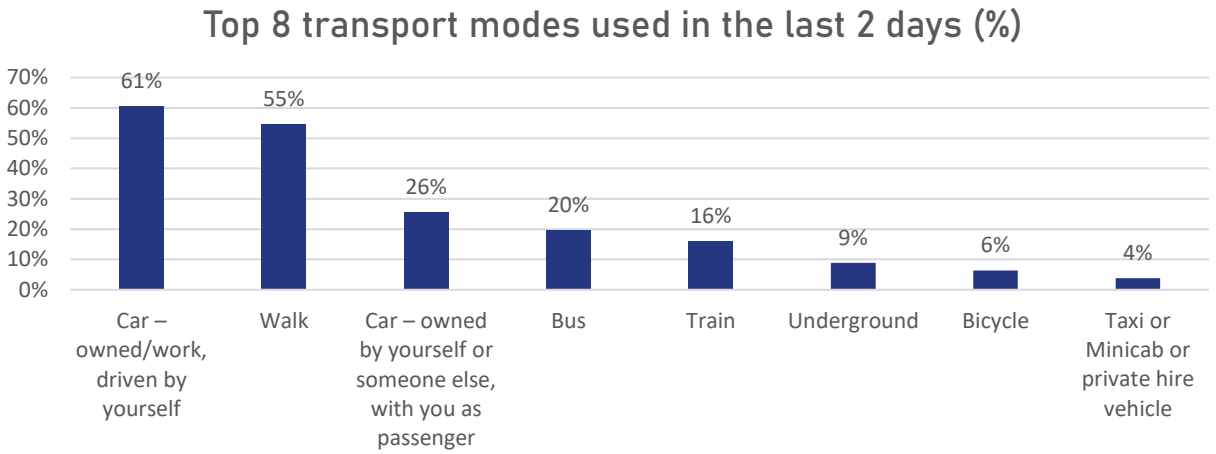
A third (33%) of those with disabilities state that their condition reduces their ability to carry out day-to-day activities. 23% state that their disability impacts their ability to travel 'a lot' and a further 45% are impacted a 'little'. Nevertheless, 62% of them are currently employed in a typical week.

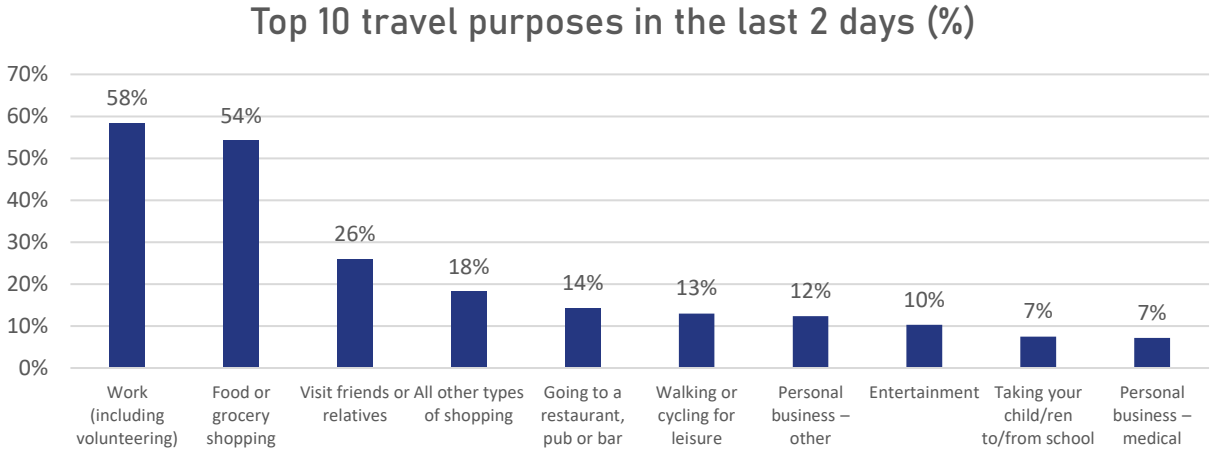
1 in 3 require assistance in their day-to-day activities, often with a helper/ personal assistant/carer providing key support for getting around.

2.0 Essex

2.2 Current Travel Behaviours and Attitude

2.2 Current Travel Behaviours & Attitudes





Travel behaviours in the last two days

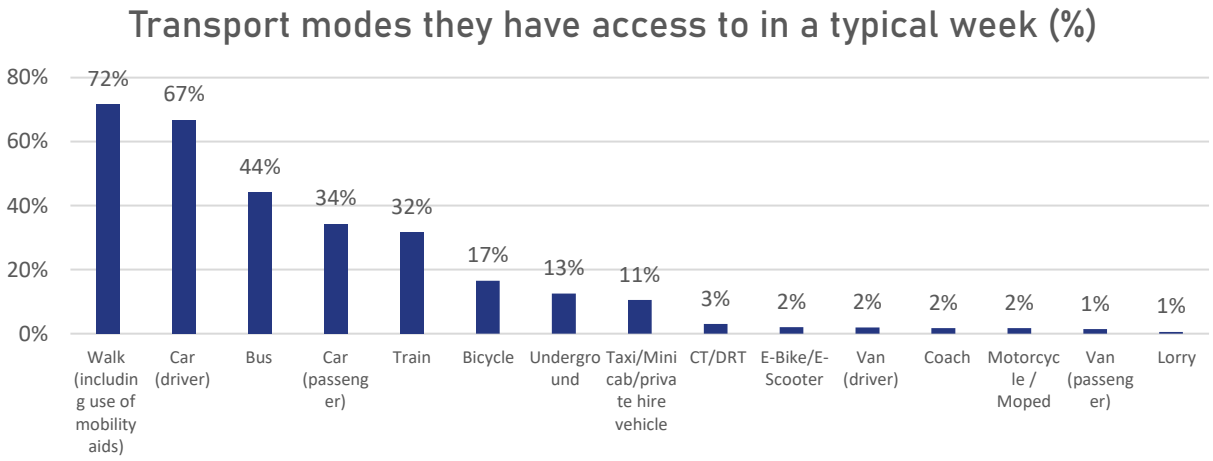
To assess most recent travel behaviour, we explored how people were travelling in the last 2 days. At the time of completing the survey, 77% of people in Essex had travelled in the last 2 days. Among those who did not travel, this was because they reported that they had no reason to travel.

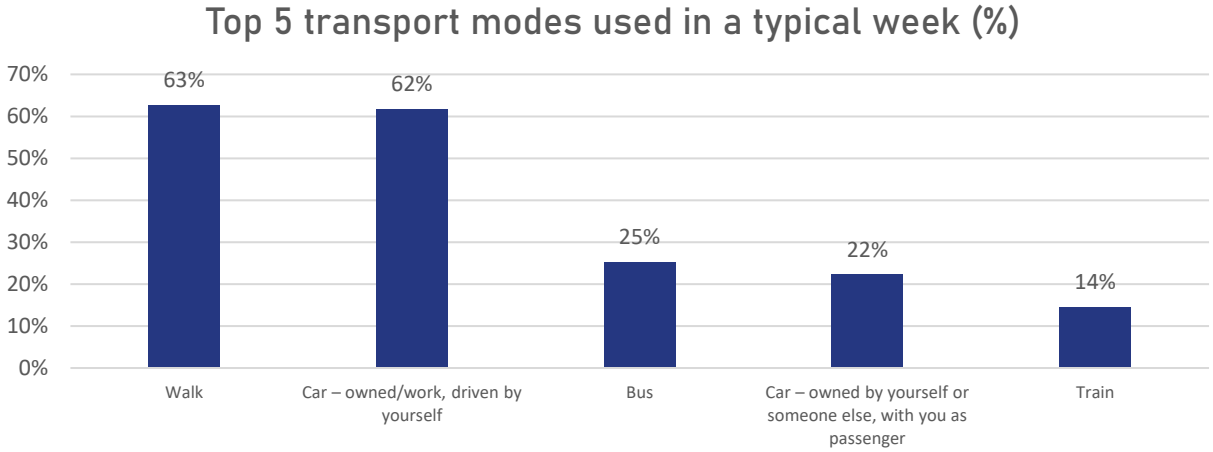
The most used transport mode in the last 2 days was car (either as a driver or passenger) and walking. Walking recorded higher figures in Epping Forest and Chelmsford.

Whilst used less overall, bus travel is higher in Epping Forest (36%), and lower in Braintree (9%). 16% use the train, similar in most districts except Brentwood where 31% used it in their last two days.

The most reported travel purposes in the last two days were for work (58%) and food/grocery shopping (54%). On average, respondents spent 40 minutes travelling to work, and 22 minutes for food or groceries (one-way trip).

2.2 Current Travel Behaviours & Attitudes





Transport modes used in a typical week

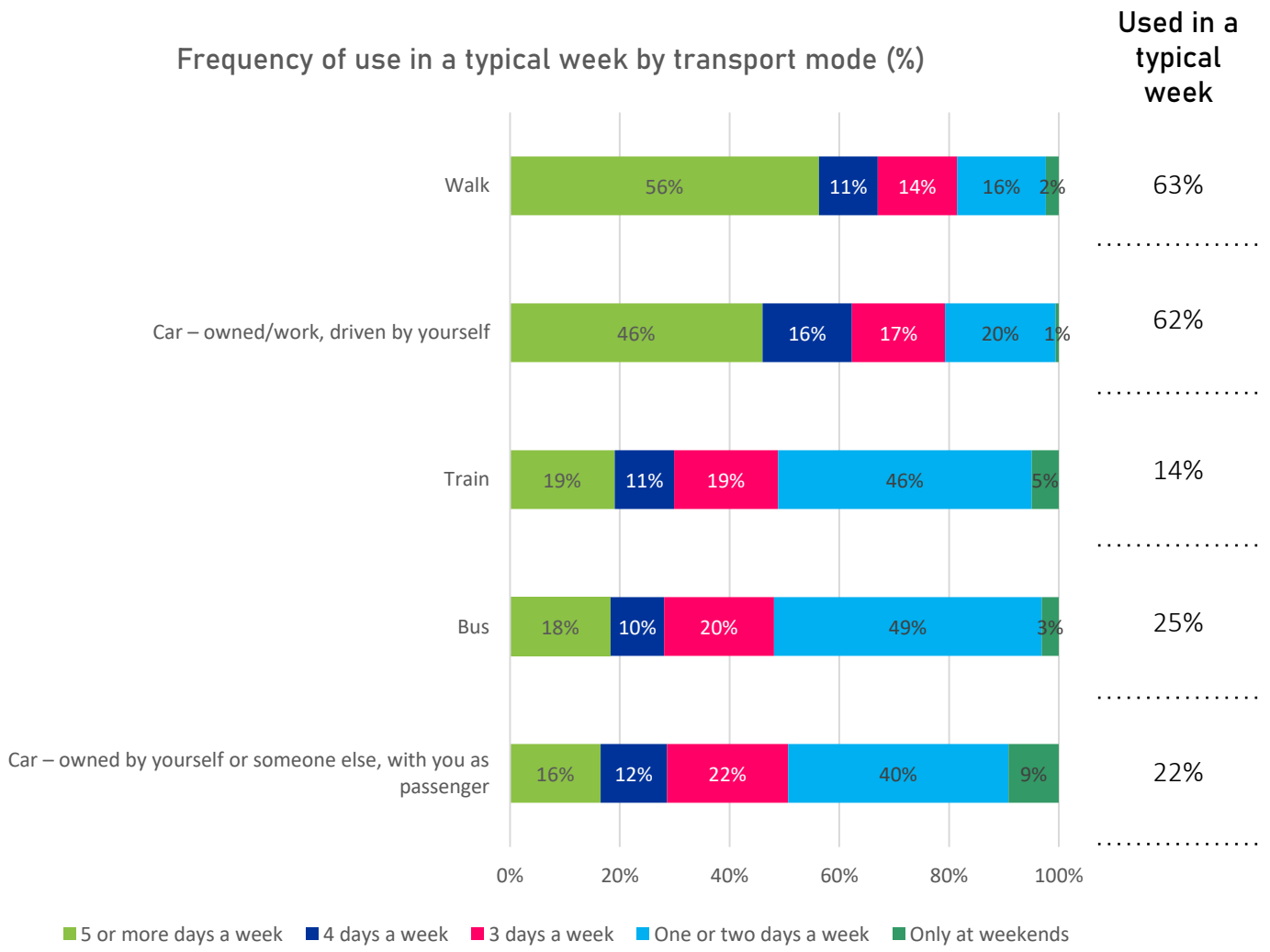
The top 3 modes of transport that respondents have access to in a typical week are walking, car as a driver, and bus. The same 3 modes are the top used in a typical week. 63% of respondents walked, closely followed by driving a car at 62%. There is a notable drop to bus use in third place at 25%, a little higher than being a passenger in a car.

Driving a car is most notable among those aged 50+ or earning more than £55,000. Respondents with an income under £25,000 are more likely to travel by bus in a typical week (36%).

There is a distinct difference between access and usage of public transport modes. 44% have access to the bus, though only 25% use them. For train, 32% have access with only 14% using it.

Driving a car is higher in Uttlesford, Braintree, Harlow, Maldon and Castle Point than walking. Bus usage is more popular in Epping Forest, Colchester and Chelmsford.

2.2 Current Travel Behaviours & Attitudes



Frequency of use in a typical week

In Essex, walking is the most used transport mode, and the most frequently used. 56% of respondents who go out by foot are doing so five or more days per week.

Driving a car is the second most used transport mode and is the second most frequently used transport mode, with 46% of car drivers travelling 5 or more days a week, and 1% only travelling at the weekend. This is likely driven by the purposes associated with this mode, as shown on page 11, where work is commonly used for this mode.

Travelling by car as a passenger, train and bus are done less frequently, around one to two days a week being most common.

2.2 Current Travel Behaviours & Attitudes

Walking	Walking or cycling for leisure (54%)	Food or grocery shopping (50%)	Work, including volunteering (44%)
Car (as driver)	Food or grocery shopping (77%)	Work, including volunteering (73%)	Visit friends or relatives (58%)
Car (as passenger)	Food or grocery shopping (62%)	Visit friends or relatives (55%)	Leisure and entertainment (53%)
Bus	Work, including volunteering (54%)	Leisure and entertainment (37%)	All other modes of shopping (37%)
Train	Work, including volunteering (80%)	Leisure and entertainment (32%)	Visit friends or relatives (22%)

Travel purposes in a typical week

The most common trip purposes are food or grocery shopping, work (including volunteering), 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.

Work related travel is done mainly by car (as a driver), bus or train. Fewer than half walk as part of their journey to work (44%), however the main reason for walking is for leisure.

These figures are similar to the National Travel Survey, where shopping and commuting emerged as the most common trip purposes in England in 2022.

2.2 Current Travel Behaviours & Attitudes

Walking	It is a short journey (53%)	Is convenient (43%)	Better for the environment (42%)
Car (as driver)	Is convenient (63%)	Enables me to get to and from where I need to go (61%)	Always available when I need it / flexibility (54%)
Car (as passenger)	Is convenient (55%)	Enables me to get to and from where I need to go (50%)	Is comfortable (47%)
Bus	Is convenient (55%)	Enables me to get to and from where I need to go (50%)	Better value for money (41%)
Train	Is fast at getting me to my destination (44%)	Enables me to get to and from where I need to go (38%)	Is convenient (33%)

Reasons for choosing each transport mode in a typical week

The leading reason for using the car (either as driver or passenger) was convenience (63% for drivers and 55% for passenger). A reason that is common across demographics and districts; the exception being 16-29 year olds who are less likely to consider it convenient as a driver (43%). Second is the ability to get to and from places, which is also a key characteristic of bus travel.

For rail travel, it is the speed of getting to a destination that comes out top. Walking is typically chosen for shorter journeys, is convenient (particularly in Epping Forest, Maldon, and Castle Point) and better for the environment.

Bus travel is considered better value for money (41%).

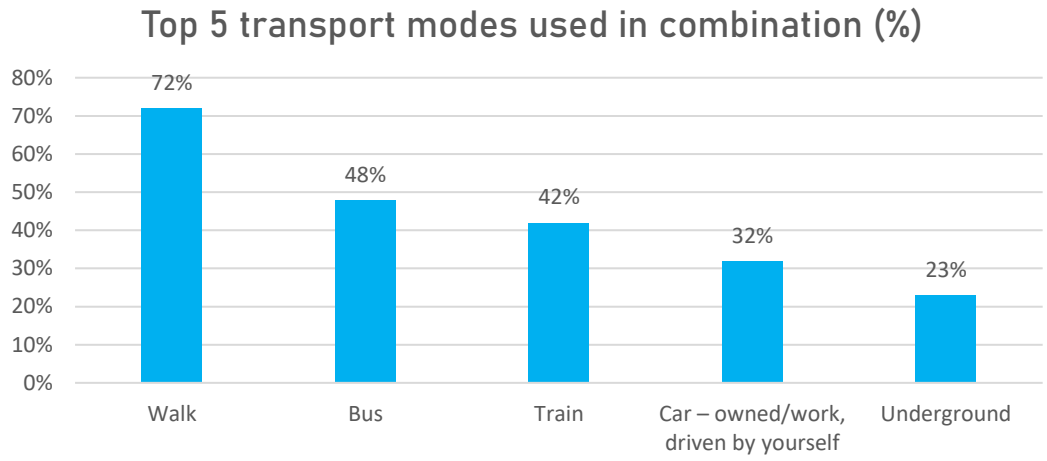
2.2 Current Travel Behaviours & Attitudes

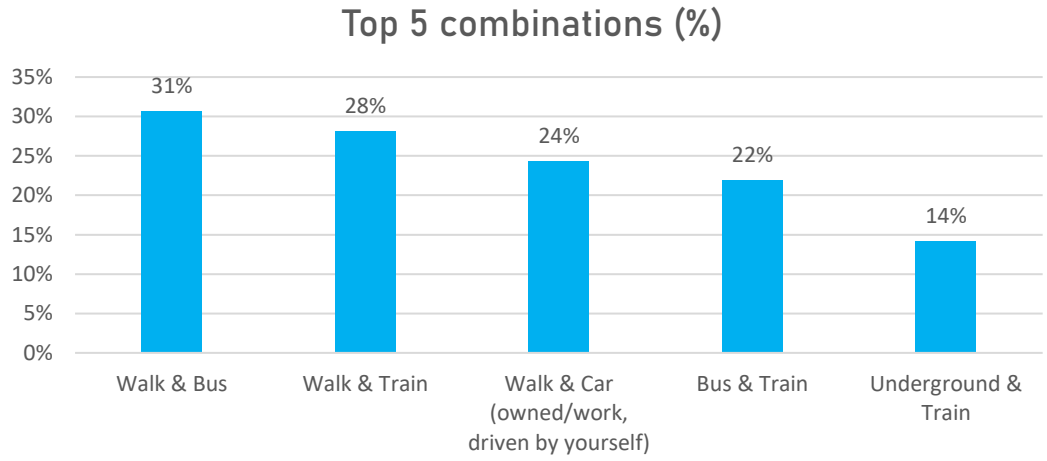
Combining transport modes in one trip

32%
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.



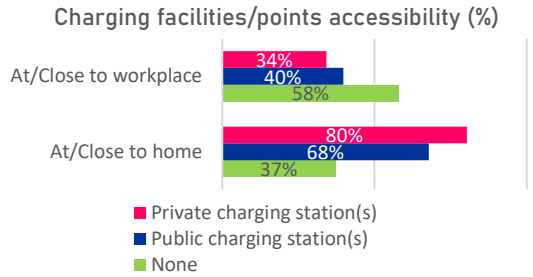


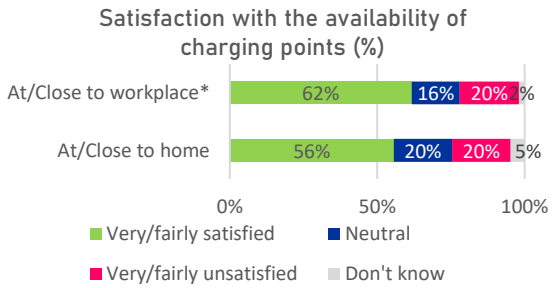
2.2 Current Travel Behaviours & Attitudes

Electric vehicle charging facilities/points

6% of car owners have an electric vehicle or plug in hybrid. Those who own an EV are more likely to have access to charging facilities when at home (compared to work), with 80% stating they have easy access to private charging and 68% having access to public charging stations.

Given the provision of private charging points at home, satisfaction with them is relatively low, with 56% being very or fairly satisfied.





Road condition

16% are very/fairly satisfied with the condition of roads in their local area.

56% are very/fairly unsatisfied with the condition of the roads in their local area.

Use of paid-for parking

Local area (30%)

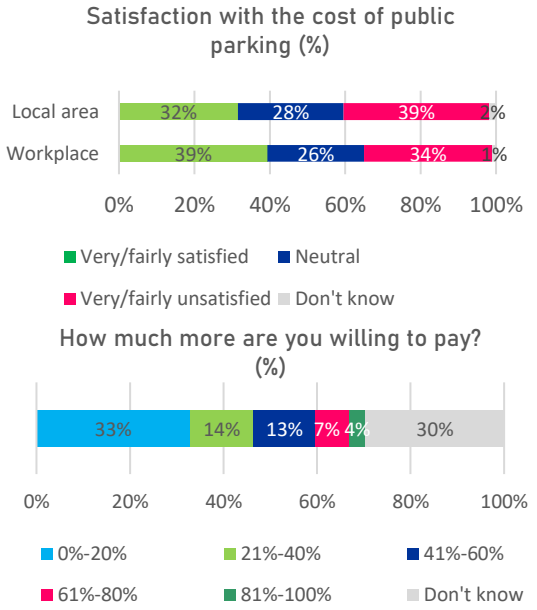
52% are very/fairly satisfied with the parking availability in local area

Workplace (14%)

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

Parking costs

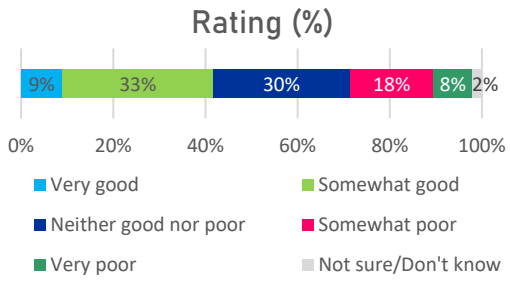
Only a minority are satisfied with the cost of parking in their local area (32%) or at the workplace (39%). 38% are willing to pay 21% or more than they currently pay for parking. The trend is mirrored across districts, albeit those in Braintree and Chelmsford are more uncertain on how much more they are willing to pay.



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

2.2 Current Travel Behaviours & Attitudes

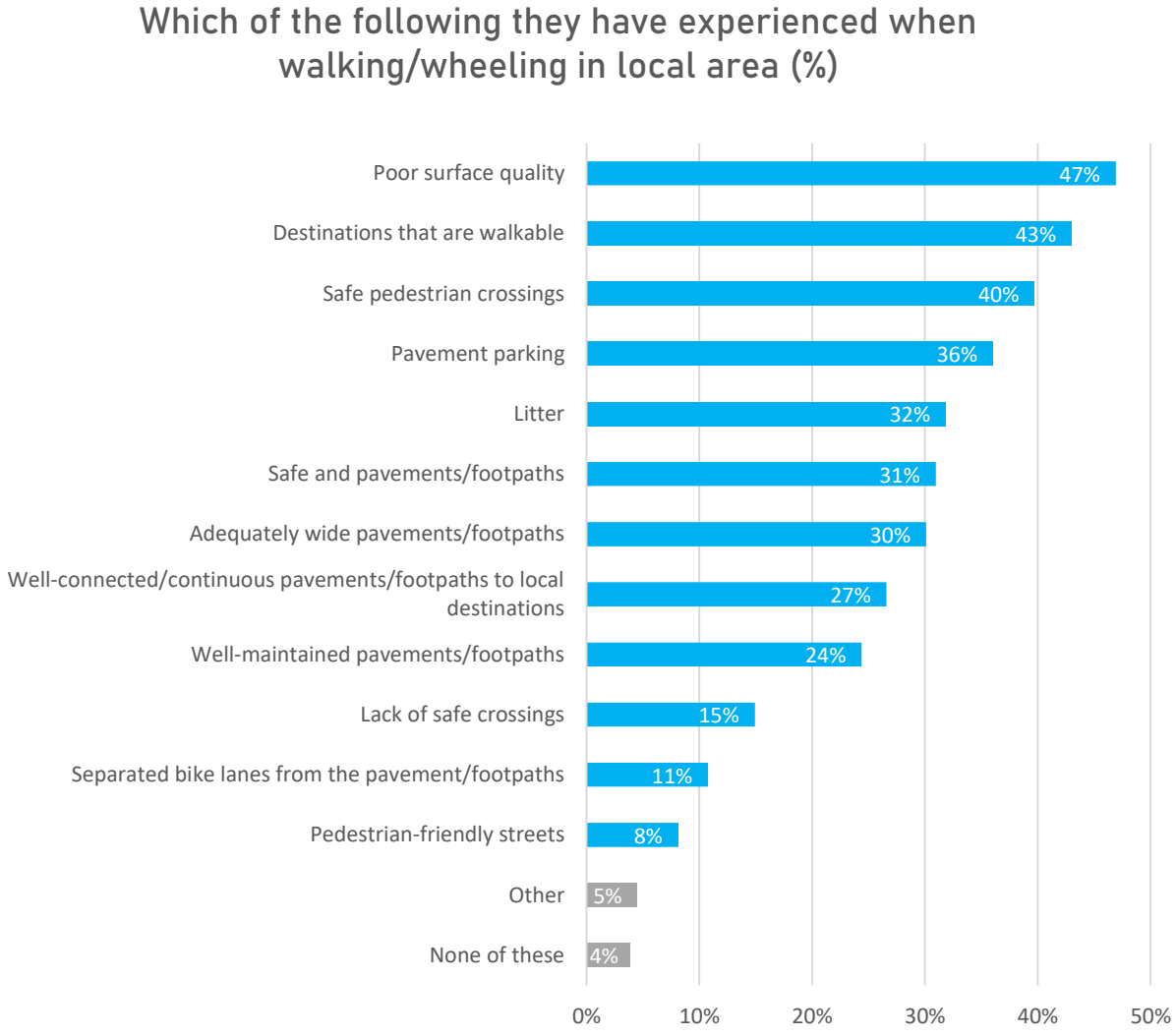
Walking/Wheeling



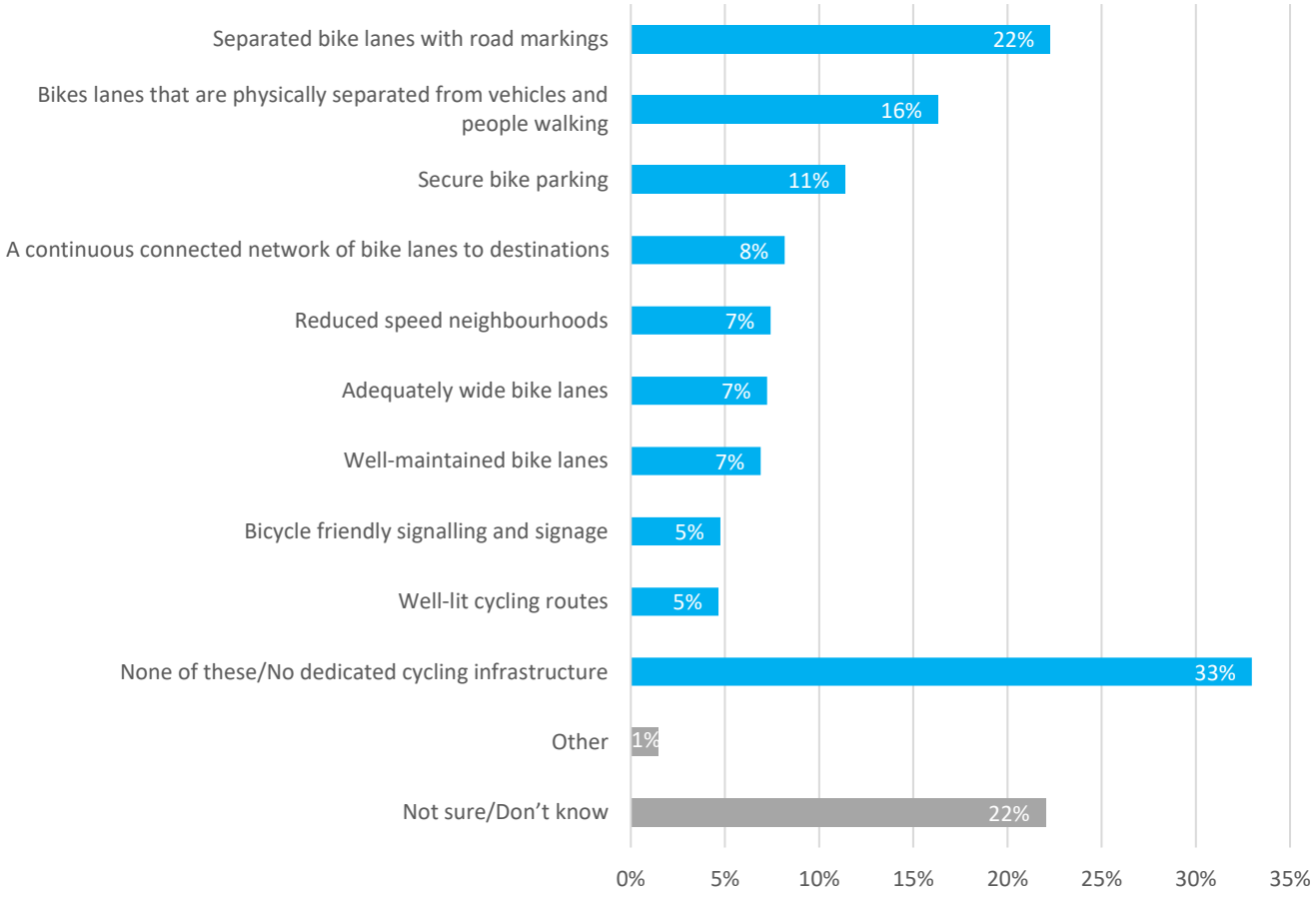
41% of people who walk in Essex rated the walking and wheeling provision in their local area as very good or somewhat good, while around a quarter (26%) rate this poorly.

Destinations being within walking distance and safe pedestrian crossings are reported as key contributors to a positive walking experience.

However, there are several issues that make a walking experience negative. The walking infrastructure is not well-maintained (only 24% suggest it is maintained), with concerns over poor surface quality when walking in the local area (47%).



2.2 Current Travel Behaviours & Attitudes

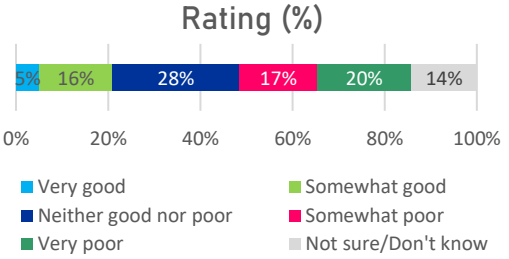


Cycling

36%
Own or have access to a bicycle

Findings suggest that despite 36% owning or having access to a bicycle in Essex, cycling provisions in the area are limited. 33% of respondents reported no dedicated cycling infrastructure in their area. Where provisions are in place, these are in the form of separate bike lanes.

When asking them about local cycling provisions, just over a fifth rated these as good.



2.2 Current Travel Behaviours & Attitudes

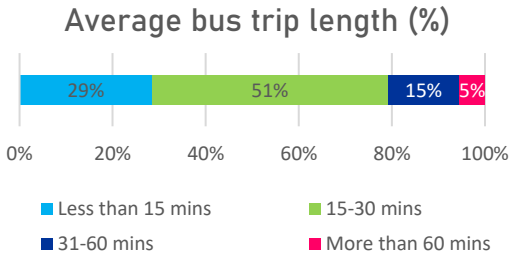
Bus

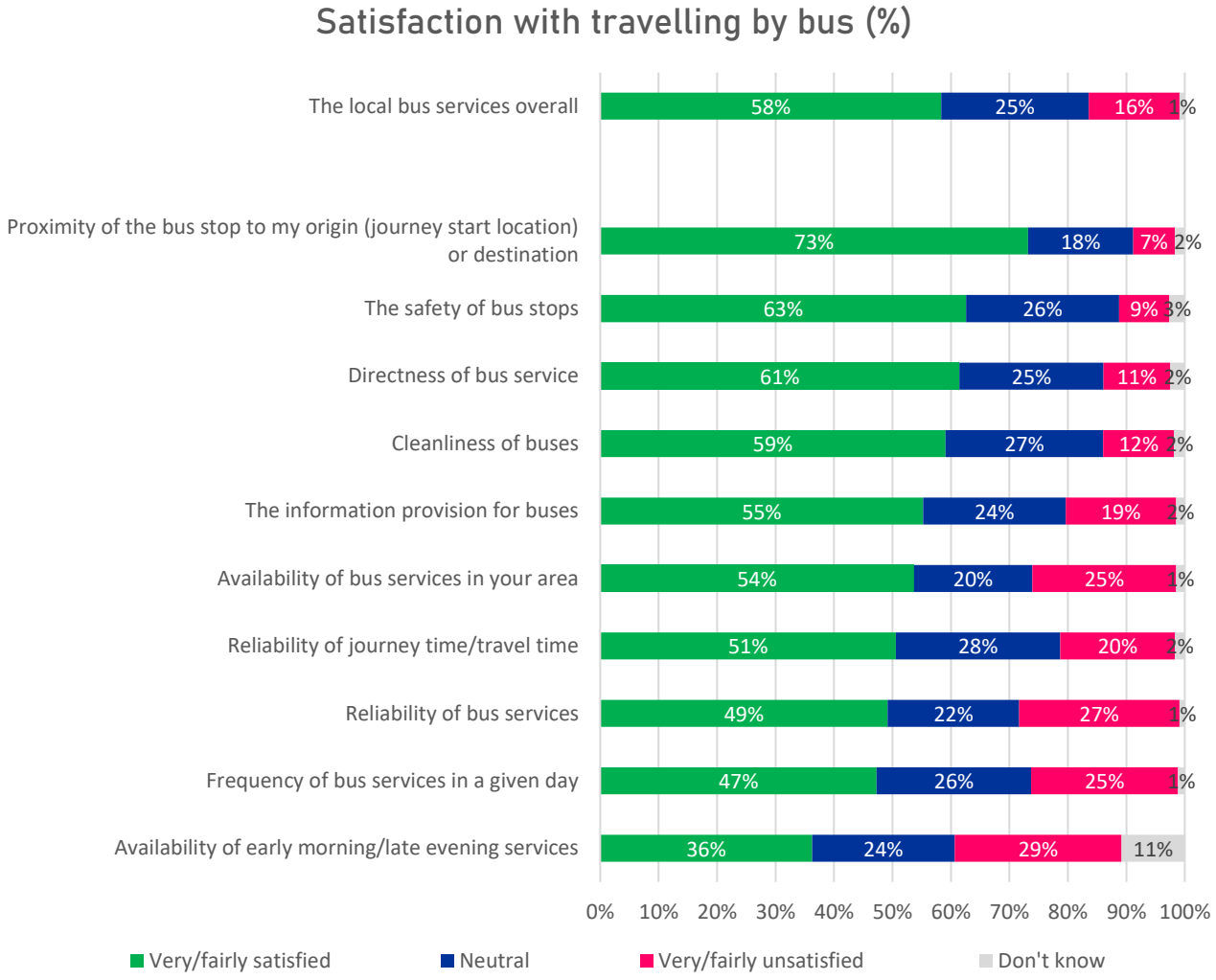
Of those using the bus, half indicate their typical bus journey lasts between 15 and 30 minutes, with an overall average of 24.6 minutes.

58% of bus users are satisfied with the local bus services overall.

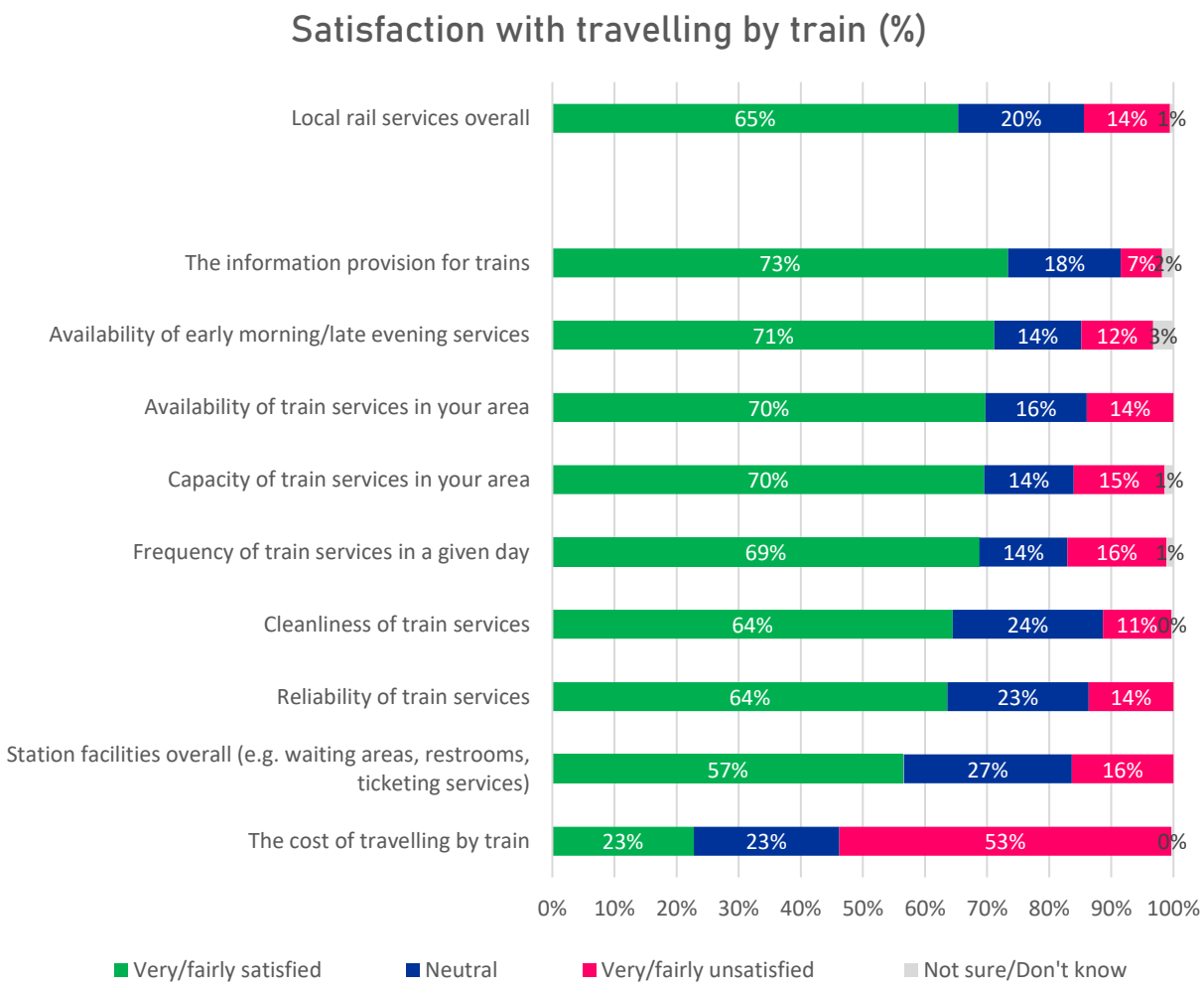
Leading areas of satisfaction are the proximity of the bus stop to their origin (73%), safety of bus stops (63%), and the directness of the bus service (61%).

The availability of early morning and late evening services records the highest dissatisfaction rate and is a key area to address in Essex together with service reliability and general frequency.





2.2 Current Travel Behaviours & Attitudes



Train

Of those using the train, satisfaction with rail services in Essex is generally positive – 65% are satisfied with local rail services overall.

Information provision is an area where trains in Essex perform well; 73% are satisfied with the information they are given.

Compared to bus services, train users are more satisfied with the availability of early/late services.

The cost of travel emerges as the primary driver of dissatisfaction among Essex rail users, with more than half dissatisfied. This is higher than the regional figure of 45%.

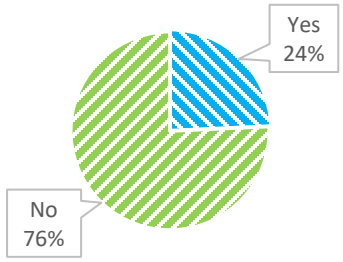
2.2 Current Travel Behaviours & Attitudes

Demand Responsive Transport/Community transport

Awareness

Most people are not aware of Demand Responsive transport or Community transport.

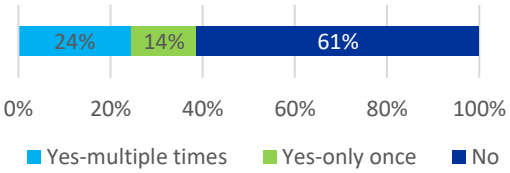
Are you aware of DRT/CT? (%)



Usage

Among the 24% who are aware of this mode of transport, 24% have travelled on it multiple times, while a further 14% have used it once. The remaining 61% have never used it before.

Have you used these before? (%)



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

Consideration

Looking at potential use, only 34% (including those with no awareness) state that they would be interested in such a service. Slightly more of disabled respondents would potentially make use of this service, and those aged 30-49, but generally those that are interested are in the minority.

Interested in using	Disability		Age			
	Yes	No	16-29	30-49	50-69	70+
Yes	38%	34%	35%	37%	30%	36%
No	62%	66%	65%	63%	70%	64%

2.2 Current Travel Behaviours & Attitudes

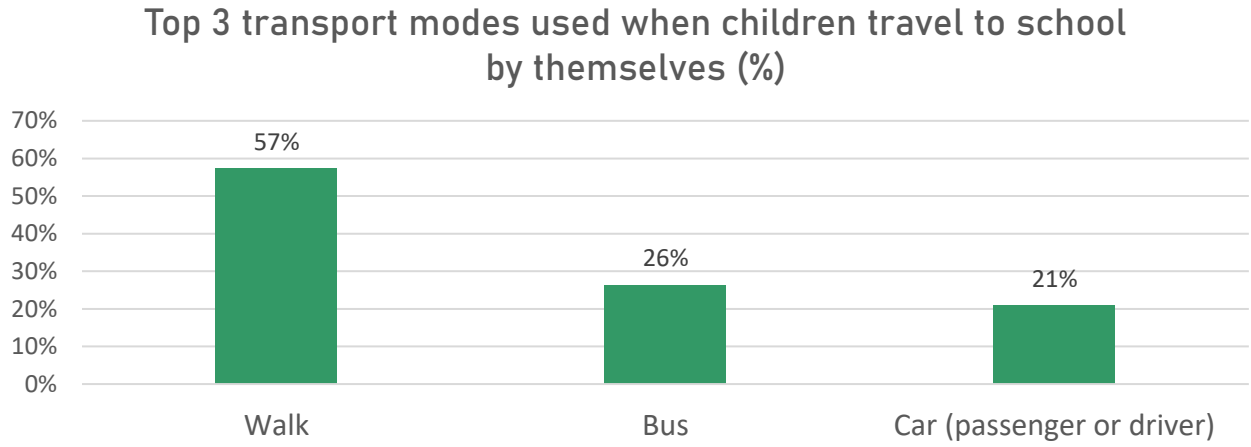
Taking children to school

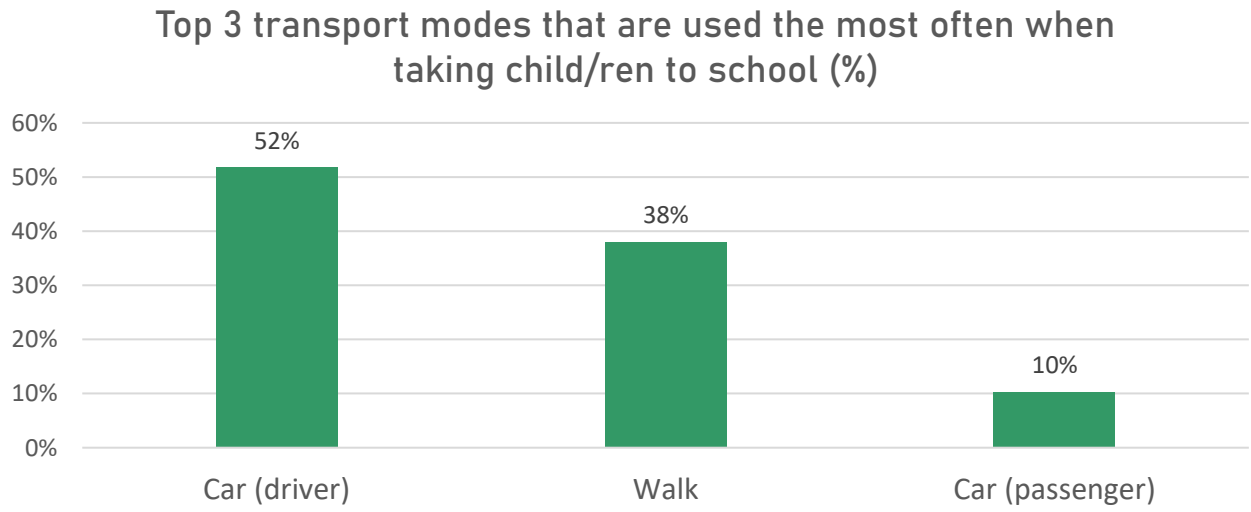
43% of parents with school-aged child/ren reported they do not take their child/ren to school in a regular week. Among these families, walking is the main mode for children of getting to school.

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

For parents who do take their child/ren to school, the main mode of transport is by car. A further 38% of parents walk their children to school.

Walking is not convenient for all parents. The main reason cited for not walking their children to school is the distance to the school or nursery (70%), and time constraints (30%).





2.2 Current Travel Behaviours & Attitudes

Work Travel Behaviours

Commuting to work

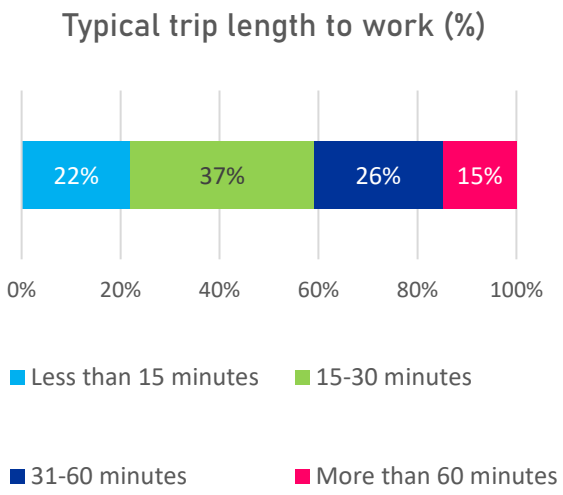
51% commute to work all of the time

In a typical week, only a small fraction of people (6%) work from home all the time, suggesting people will spend at least a proportion of their week in the work location.

The frequency of commuting is determined by job requirements, with 42% unable to work remotely and 18% mandated by their employer to be physically present. Only 15% have the flexibility to choose their work setup.

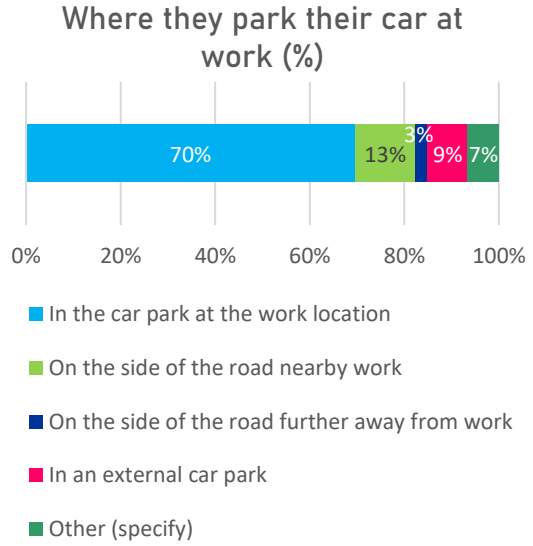
In an average week, most workers from Essex head to the office or a central location between Monday to Thursday (ranging from 68%-73%), with slightly fewer on a Friday (59%).

Typical trip length



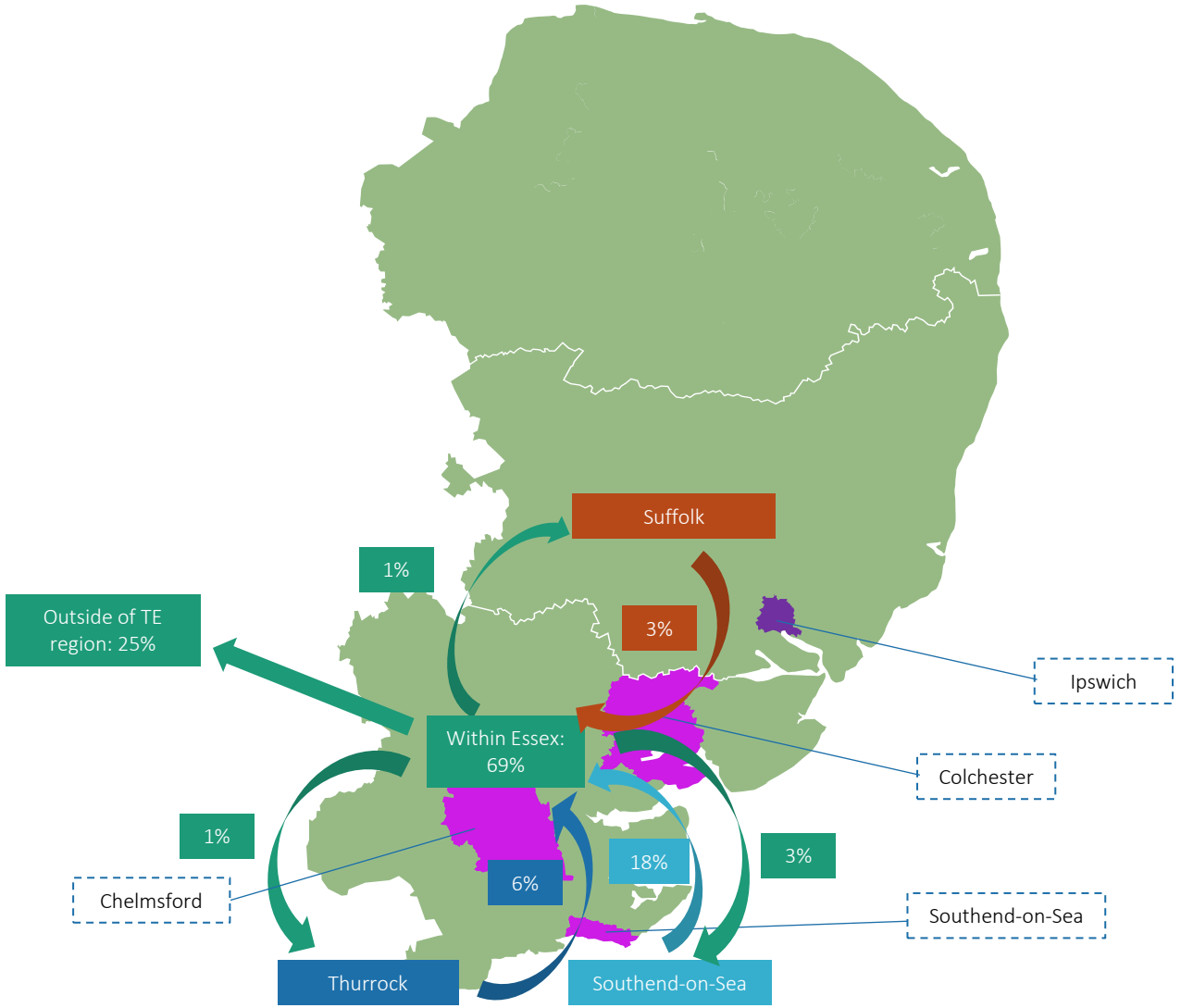
When asked about a typical one-way trip length to work, few will spend longer than 60 minutes. 15-60 minutes of commuting is most common, the average being 33 minutes.

Car parking



The majority of those who travel to work by car can park conveniently at the work location. 13% park on a nearby road, and 9% have an external car park they can use.

2.2 Current Travel Behaviours & Attitudes

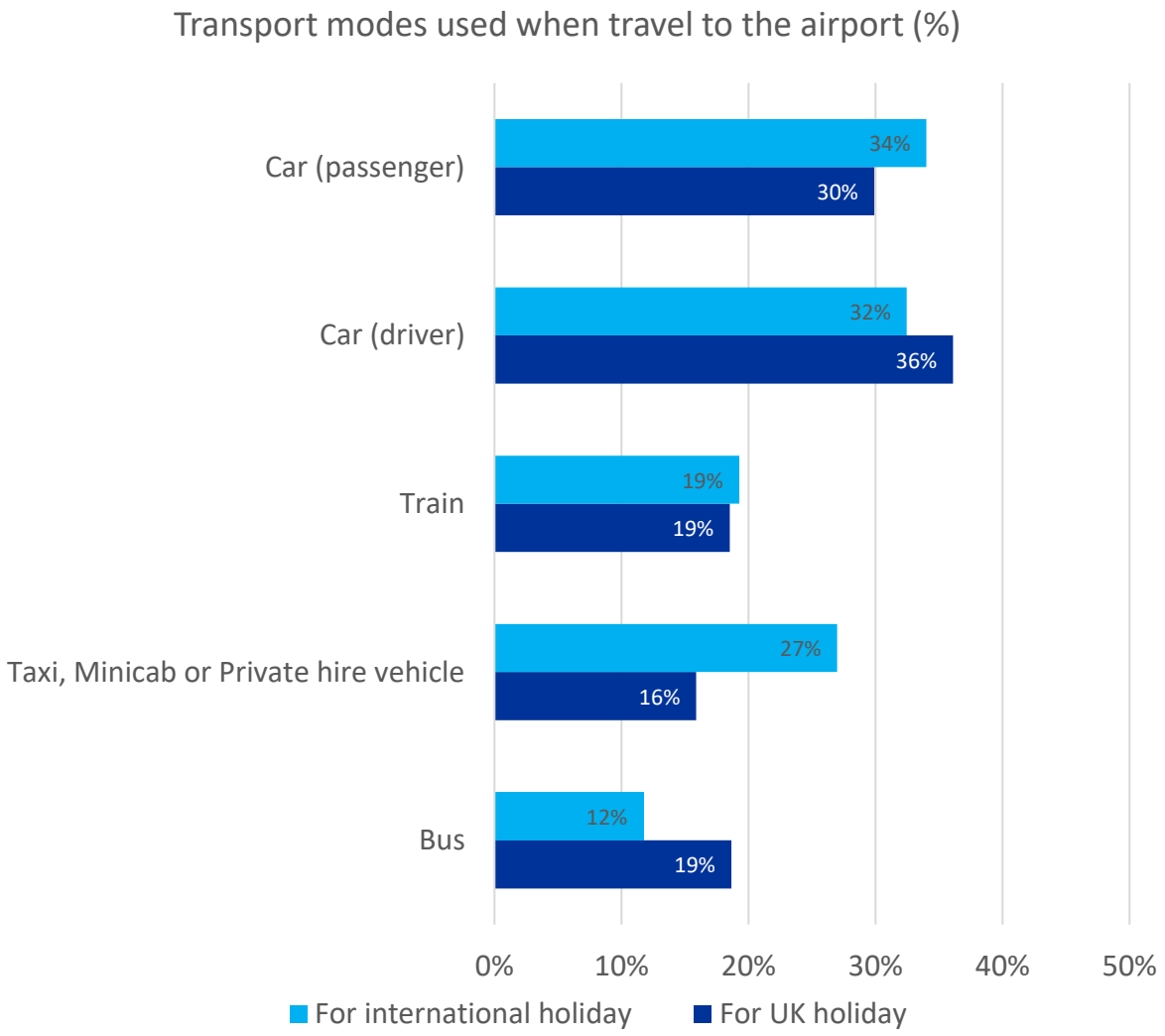


Work Travel Behaviours

Of the respondents who provided their work postcode 69% of Essex residents work in Essex county. This is a smaller proportion living and working in their county than Norfolk and Suffolk, reflecting the higher number commuting out of the region, especially into London.

A very small portion commute to Suffolk (1%) and a lower number of Essex commuters travel to Southend-on-Sea or Thurrock for work, than come into Essex from those authorities. 18% of Southend commuters come into Essex, but only 3% make the reverse journey, and 6% of Thurrock commuters come into Essex but only 1% travel into Thurrock from Essex for work.

2.2 Current Travel Behaviours & Attitudes



Travelling to the airport for international/UK holiday

Among those who travel to the airport, the top mode of transport is the car (either as driver or passenger), and this is the same for both international and domestic holidays.

For international holidays, taxi, minicab or private hire vehicles are used more than for domestic flights. While for domestic flights, after car, people will use a train or a bus to get to the airport.

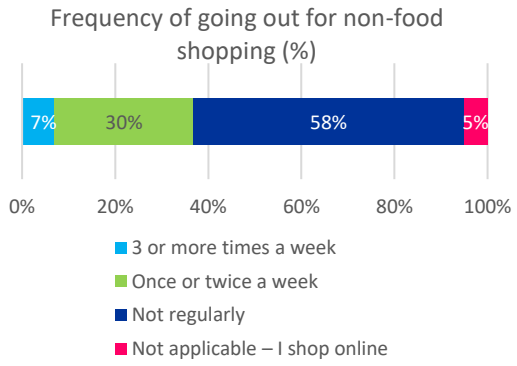
2.2 Current Travel Behaviours & Attitudes

Shopping

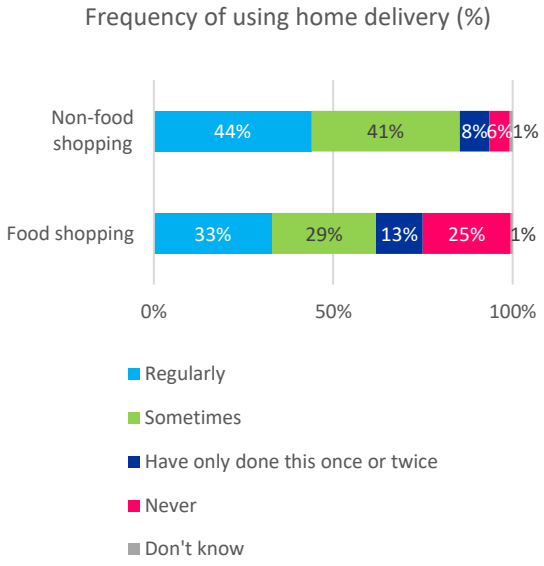
Travelling for non-food shopping

For typical non-food shopping trips, most respondents visit nearby towns (47%) or opt for a destination close to their home, which could include both cities or towns.

Non-food shopping trips are most likely irregular in occurrence, with 58% reporting this. Only a small minority (5%) are relying on online shopping for their non-food shopping.

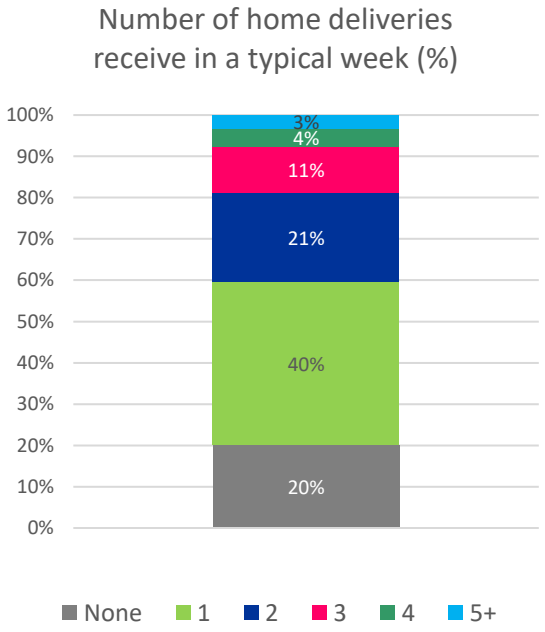


Home delivery current behaviours



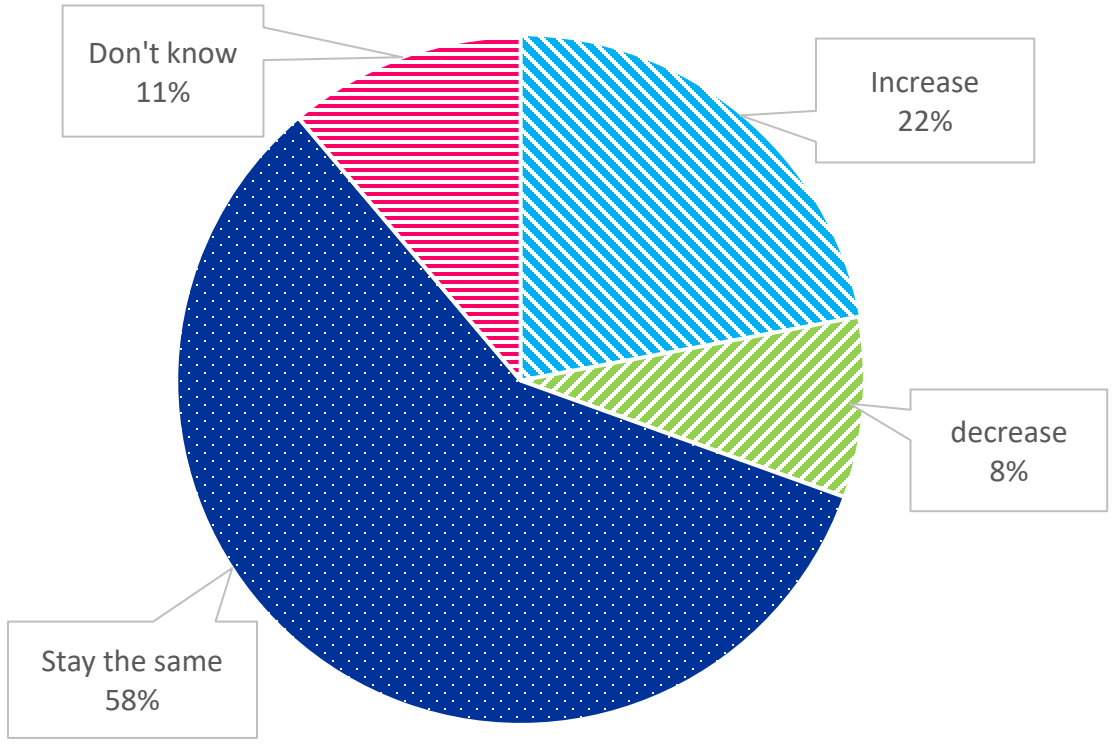
85% of respondents mention using home delivery for non-food shopping regularly or sometimes. This is most pronounced in Maldon and Rochford. Home delivery is used less for food shopping, with a quarter having never ordered online.

In a typical week, 40% of respondents report receiving home deliveries once, 21% receive them twice, while 20% don't receive any home deliveries at all.



2.2 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

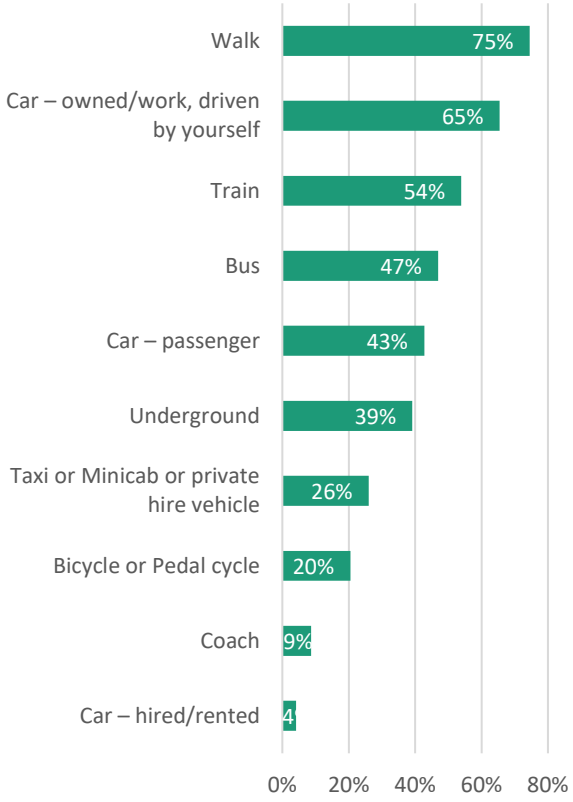
Most respondents (58%) foresee no change in their online shopping habits, including food purchases, over the next year. Meanwhile, 22% anticipate an increase, most notably in Harlow.

For home delivery people are keen to see services that reduce carbon emissions and reduced deliveries in one singular 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%	41%	66%
I would use it	53%	73%	86%

2.2 Current Travel Behaviours & Attitudes

Top 10 transport modes that are likely to be used in the next 12 months (%)



Future usage

All Transport Modes

The key modes of transport residents in Essex are likely to use in the next 12 months are walking and driving – both of which are the current top 2 modes used.

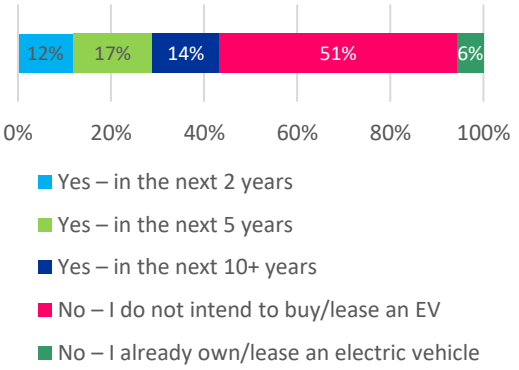
Bus and rail travel is expected to be used in the coming months. Uptake of cycling is lower at 20%, but higher than current uptake (7%).

The trend is similar across districts, albeit rail travel is lower in Harlow, Colchester and Tendring.

Electric Vehicle

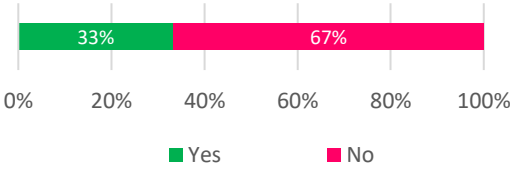
Currently, only 6% of respondents have an electric vehicle or plug-in hybrid. When speaking to those who intend to continue using a car in the future, 43% express an intention to purchase or lease an electric vehicle in the next 2-10+ years, with 29% in the next 5 years. This will mean more work towards ensuring charging infrastructure is in place and satisfactory.

Do you intend to buy/lease an EV? (%)



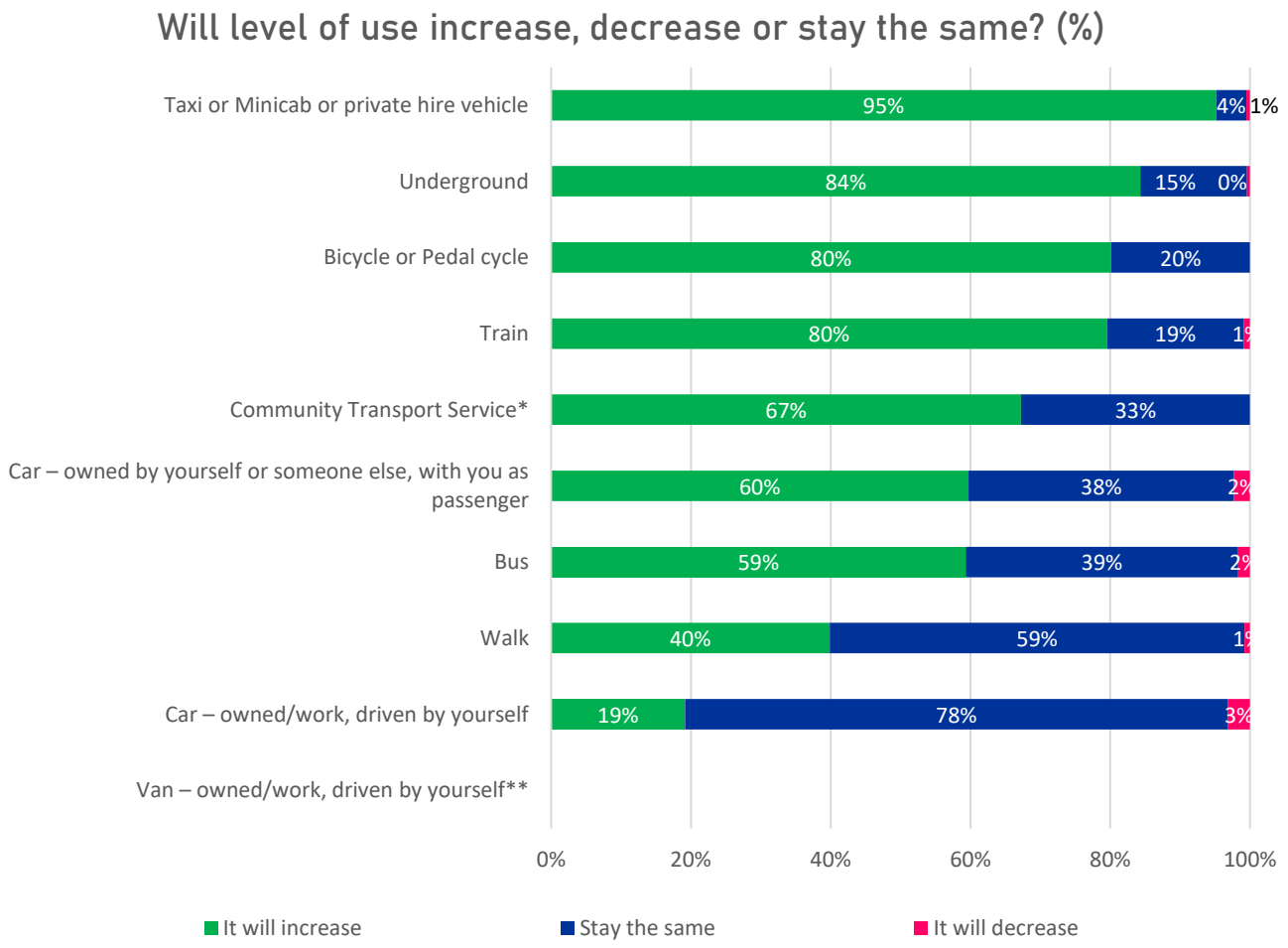
Connected and autonomous vehicle

Would you use a connected and autonomous vehicle? (%)



A third of Essex respondents would consider using a self-driving autonomous vehicle if available. There is more apprehension about this in Tendring and Braintree, while Epping Forest is most in favour (43%).

2.2 Current Travel Behaviours & Attitudes



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

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

95% of respondents that use the top 10 transport modes claim that they will increase taxi/minicab/private hire vehicle use and 84% state that they will increase underground use in the next 12 months.

There is also intention to increase cycling in the future, suggesting people have good intentions to go for greener options.

The level of walking and driving a car are more likely to stay the same.

Very few express intentions to decrease their overall usage of the transport modes listed.

2.0 Essex

2.3.1 Future Travel Behaviour and Choices: Barriers and decline in use

To further understand respondents' future travel behaviours, the following slides highlight the key barriers to cycling, using public transport (bus, train and Underground), walking, and various forms of car usage in their local area. Additionally, reasons for decreasing usage of these transport modes in the future are also presented.

2.3.1 Barriers and decline in use

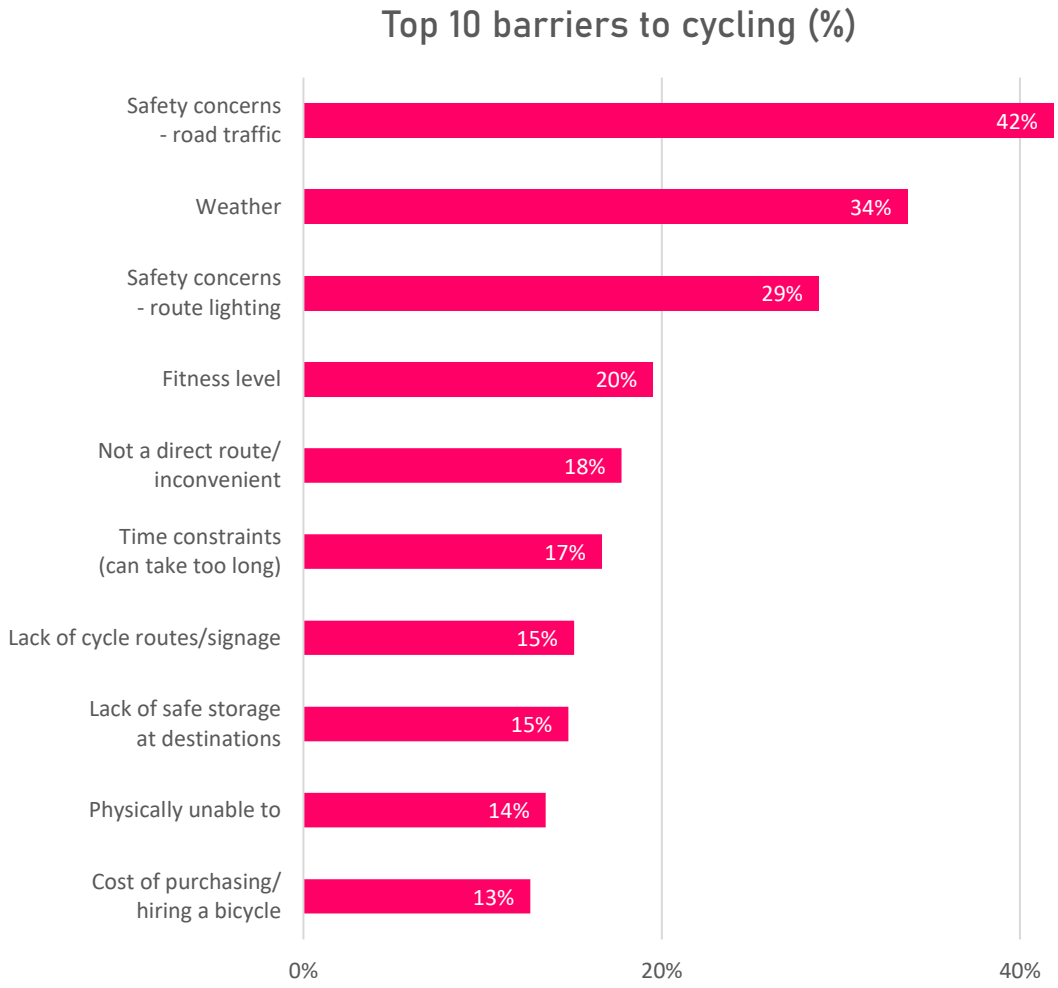
Cycling

Safety concerns are a notable barrier to cycling in Essex, specifically due to cycling alongside road traffic (42%) and the lighting provision along cycle routes (29%). These concerns are most notable in Maldon.

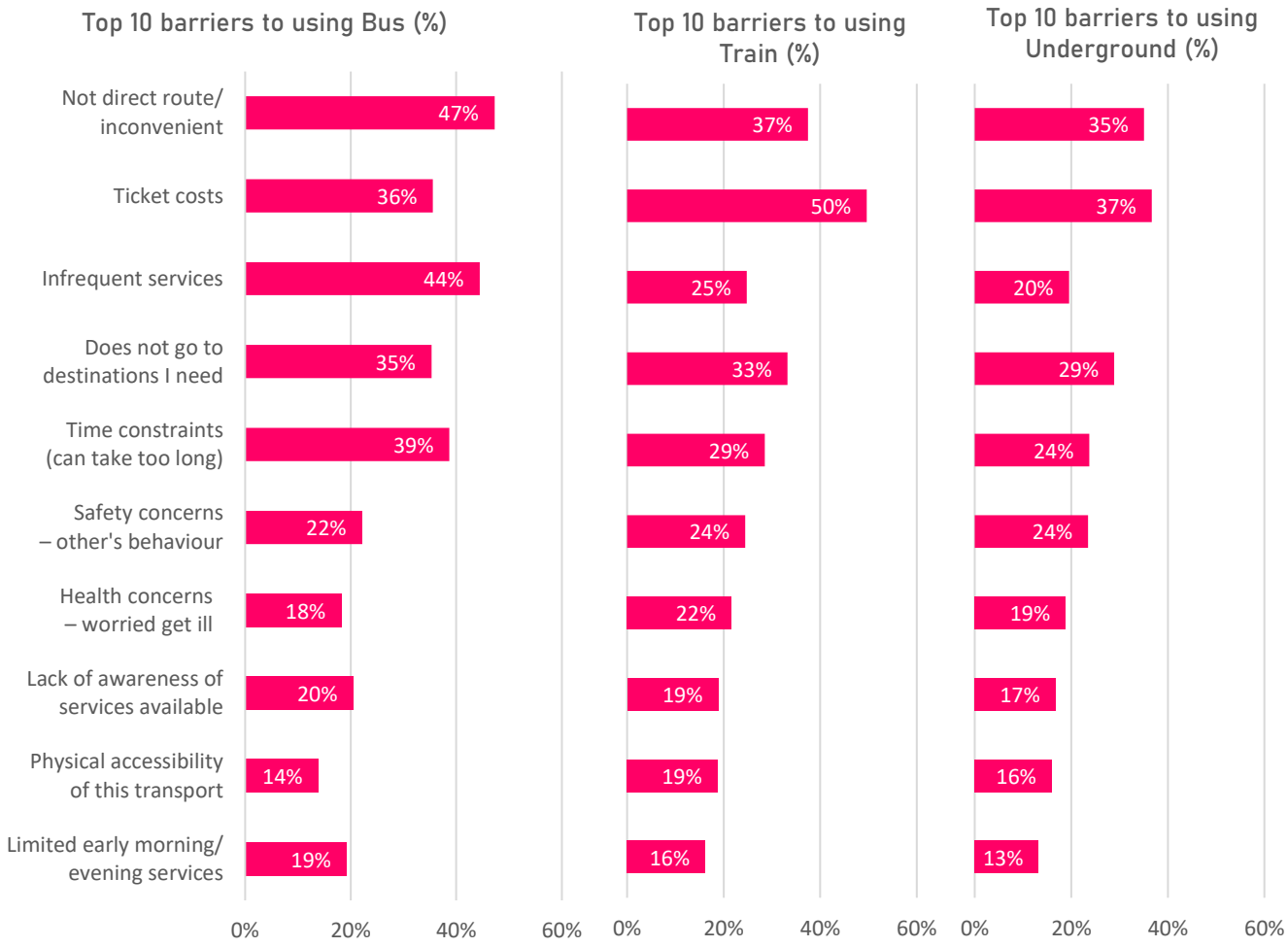
Weather is the second biggest barrier to cycling, putting off over a third.

All other factors are secondary but still contribute to reasons for not cycling. For instance, fitness affects 1 in 5 Essex respondents, and for those in Uttlesford, this is the third top reason for not cycling, behind weather and traffic.

There are no distinct differences across demographics of Essex respondents.



2.3.1 Barriers and decline in use



Public transport – barriers

'Non direct or inconvenient route' is a top barrier to using the bus – a point that is shared across the districts. While the price of tickets is the greatest deterrent to travel by train or underground.

'Frequency of service' and 'journey time' are also key barriers for bus use. The impact of these factors on train or underground use is generally less, however it increases for those living in districts outside cities.

Across demographic groups, respondents aged 50 and older are most likely to report 'non-direct routes' as a barrier to bus use. However, for the 16-29 age group, 'ticket costs' is a more significant barrier than 'non-direct route' when it comes to using buses.

2.3.1 Barriers and decline in use

Public transport – decline in use

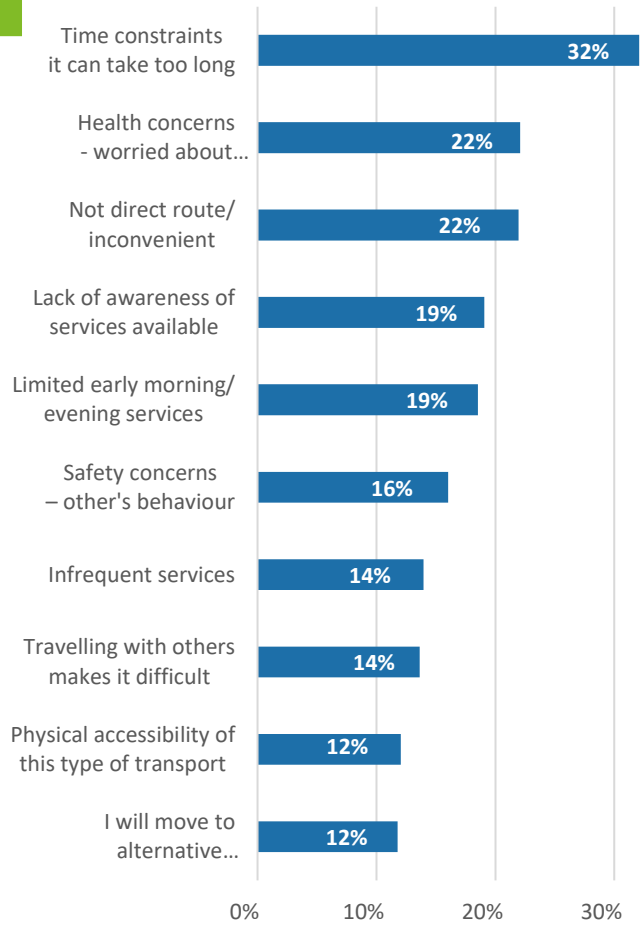
When asked about why people thought they would reduce their use of public transport, there were differences between bus and train travel.

For buses four of the top five reasons were related to services including journey times (32%), indirect routes (22%), limited early and later services (19%) and lack of awareness of services (19%).

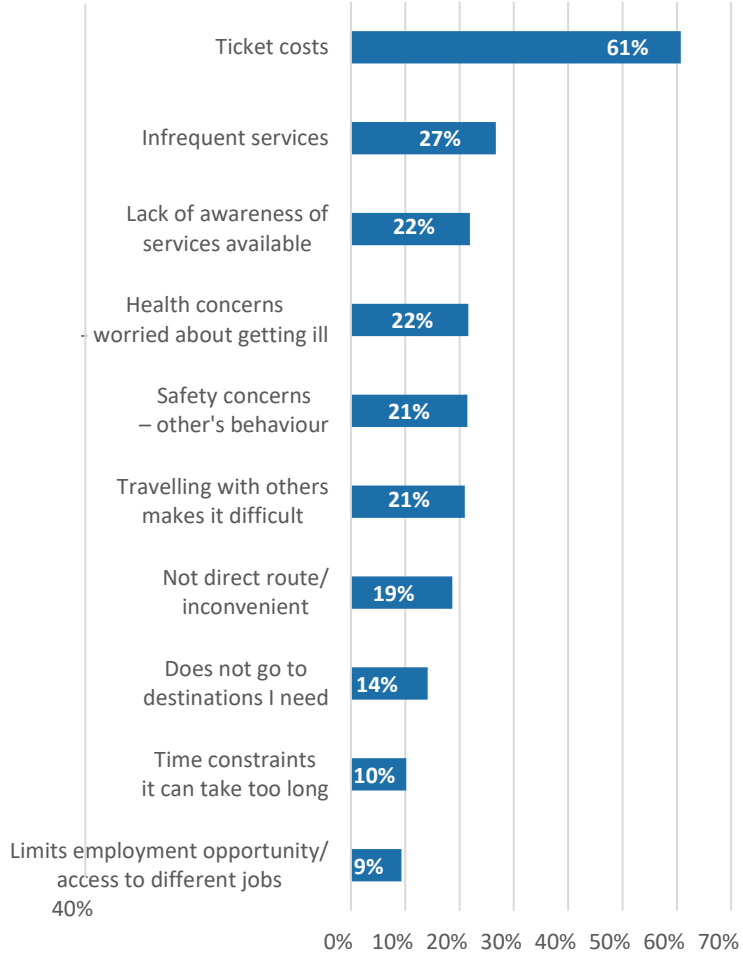
For trains ticket costs was by far the highest reason for reducing train use (61%), with the infrequency of services coming next at 27%. This was followed by health concerns and lack of awareness of services (both at 22%).

Areas of similarity across bus and train include lack of awareness of services available (bus 19%, rail 22%) and safety concerns around other's behaviour (bus 16%, rail 21%). These suggest areas operators and authorities could jointly do more on to retain passengers.

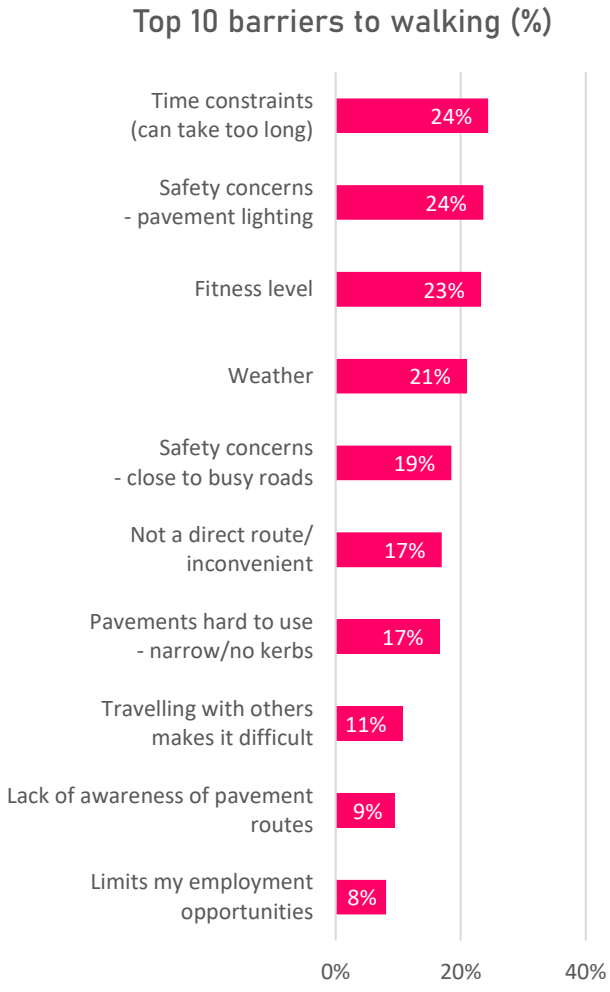
Top 10 reasons for reducing Bus use (%)

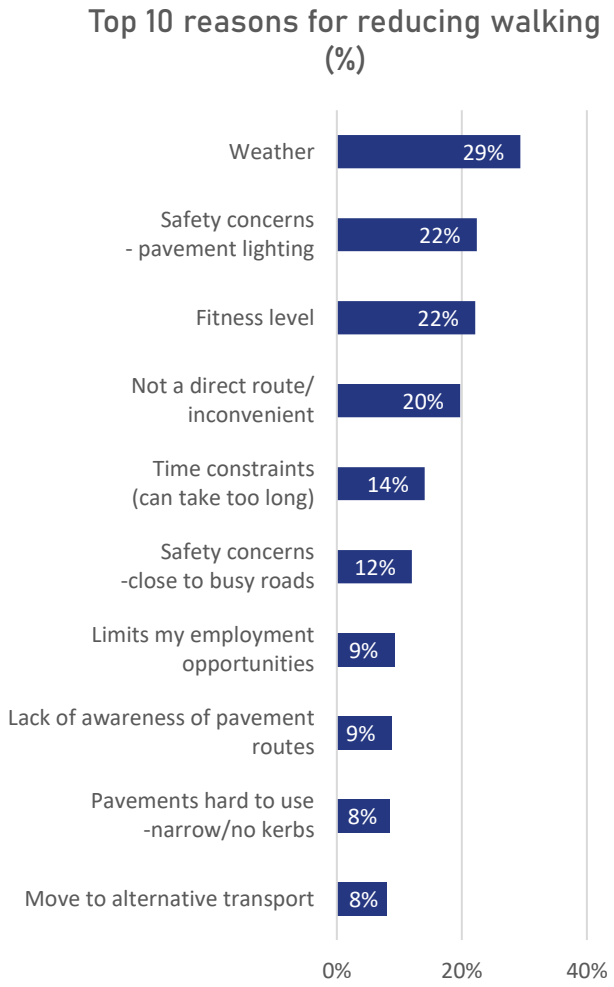


Top 10 reasons for reducing Train use (%)



2.3.1 Barriers and decline in use





Walking

‘Time constraints’, ‘pavement lighting’, and ‘fitness level’ are all top barriers to walking. This is similar across districts, albeit there are some further safety concerns relating to busy roads in some areas, such as Braintree. Additionally, for those aged 60+, ‘fitness level’ is the top barrier to walking.

‘Weather’ dominates as the reason for reducing walking in the future, suggesting areas are not well-served to support walking during poorer weather. ‘Pavement lighting’ is also a reason, followed by ‘fitness level’.

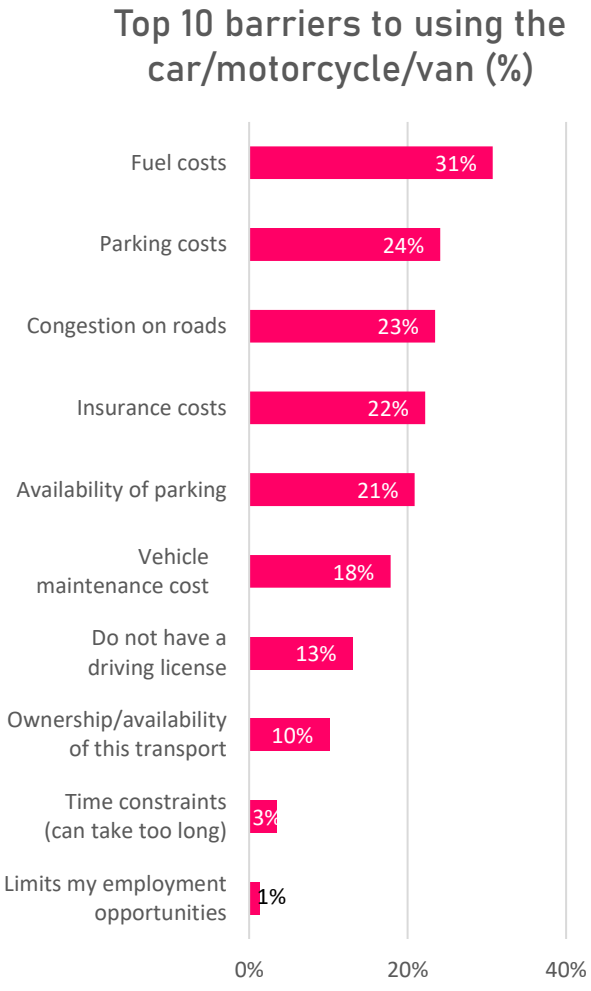
2.3.1 Barriers and decline in use

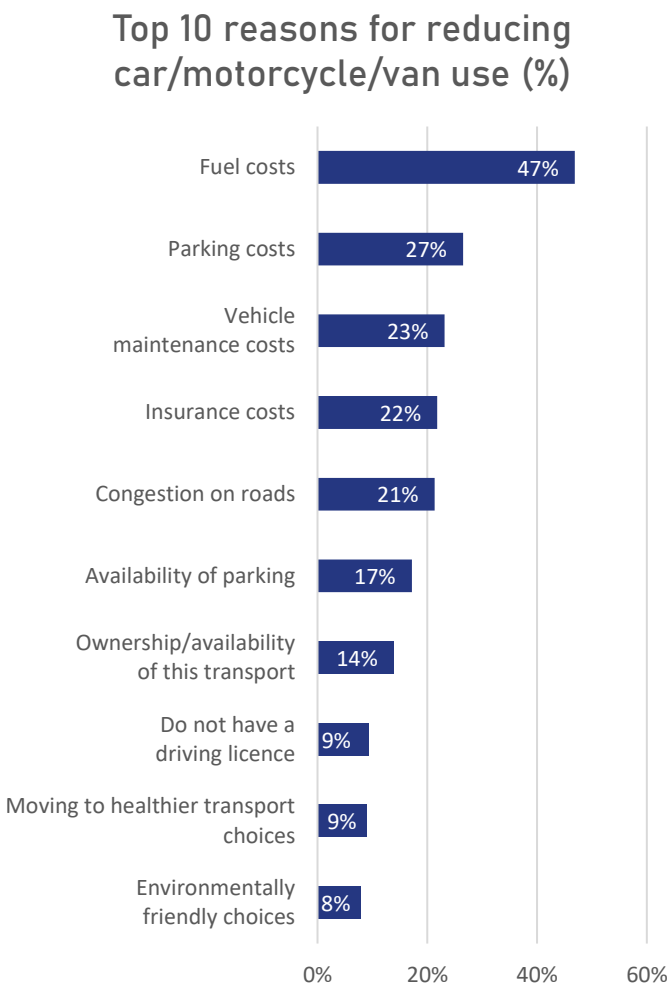
Car/motorcycle/van

'Fuel costs' dominate both the barriers and reasons for reducing use of car/ motorcycle/van as a mode of transport, particularly among those aged under 49. Second to this are parking costs, with 24% considering this a barrier and 27% a reason for reducing use.

When looking at barriers to using cars by district, parking is viewed as a greater concern than fuel among those in Uttlesford, while for those in Braintree, fuel costs are clearly the greatest barrier to using the car/ motorcycle/van. 'Congestion on roads' is more of a barrier in Uttlesford and Maldon than other districts, while 'insurance costs' are more likely to impact those in Epping Forest.

It is worth noting that neither 'healthier transport choices' nor 'environmental friendly choices' are prominent reasons for reducing car use.

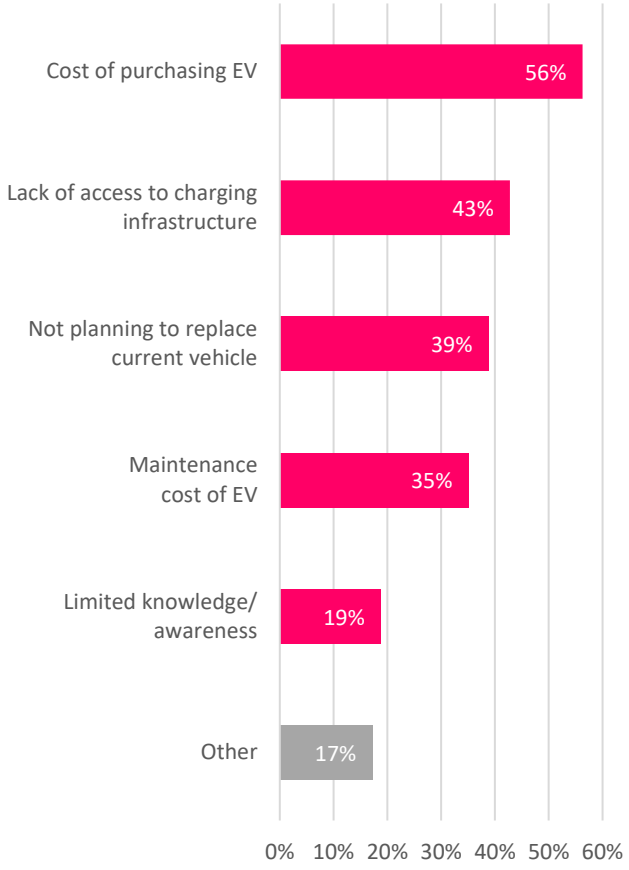




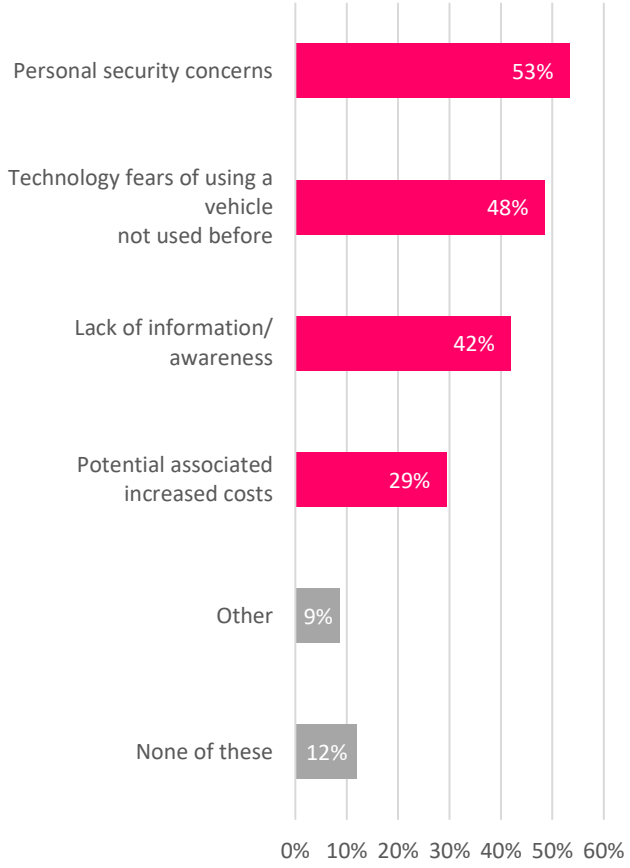
Note: * denotes a base size falling below 50 but above 30; ** denotes a base size below 30

2.3.1 Barriers and decline in use

Barriers to owning or leasing an electric vehicle (%)



Barriers to using a connected and autonomous vehicle (%)



Electric vehicle & connected and autonomous vehicle

Electric Vehicle

'Cost of purchase' is a barrier for 56% of those not intending to buy/lease an EV, particularly among men, the 50+ age group, and those with an income of £25,000-54,999. 'Lack of access to charging infrastructure' is also noted. However, 39% do not plan to replace their current vehicle, suggesting more will need to be done to entice individuals to replace their current vehicle.

Autonomous Vehicle

Caution around personal security and technology fears of an unfamiliar vehicle were, overall, the greatest barriers for autonomous vehicle use rather than any potential associated costs.

2 in 5 (42%) have limited information or awareness of these vehicles, suggesting more needs to be done to educate people to address any concerns.

2.3.1 Barriers and decline in use

Car share / car club

Car Sharing

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

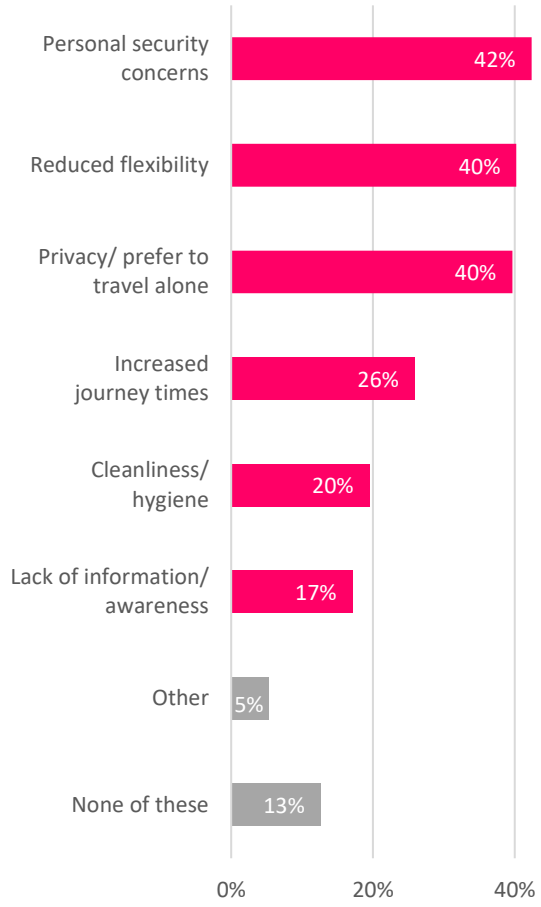
Personal security is a significant concern for women, those aged 30-49 and those living in Basildon, while less so in Brentwood. Those in Uttlesford are more likely to prefer the privacy and flexibility of not car sharing than other districts.

Car club/car hiring1

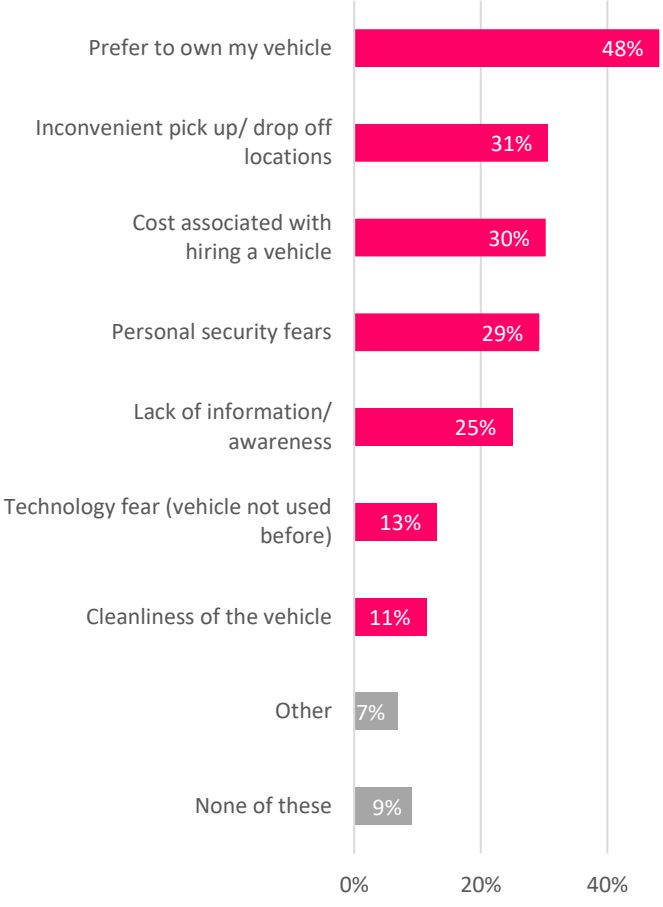
Preference for owning their vehicle is the top barrier associated with car club/car hiring, among men, 50+ age group and £55,000+ income group. Epping Forest respondents also have the strongest preference for this.

'Inconvenience', 'costs associated' and 'personal security fears' are secondary but important for 3 in 10. Information may help to improve perceptions, particularly as 25% suggest limited information and awareness is a barrier to using car clubs/hiring a car.

Barriers to car sharing with people (%)



Barriers to using car club/car hiring

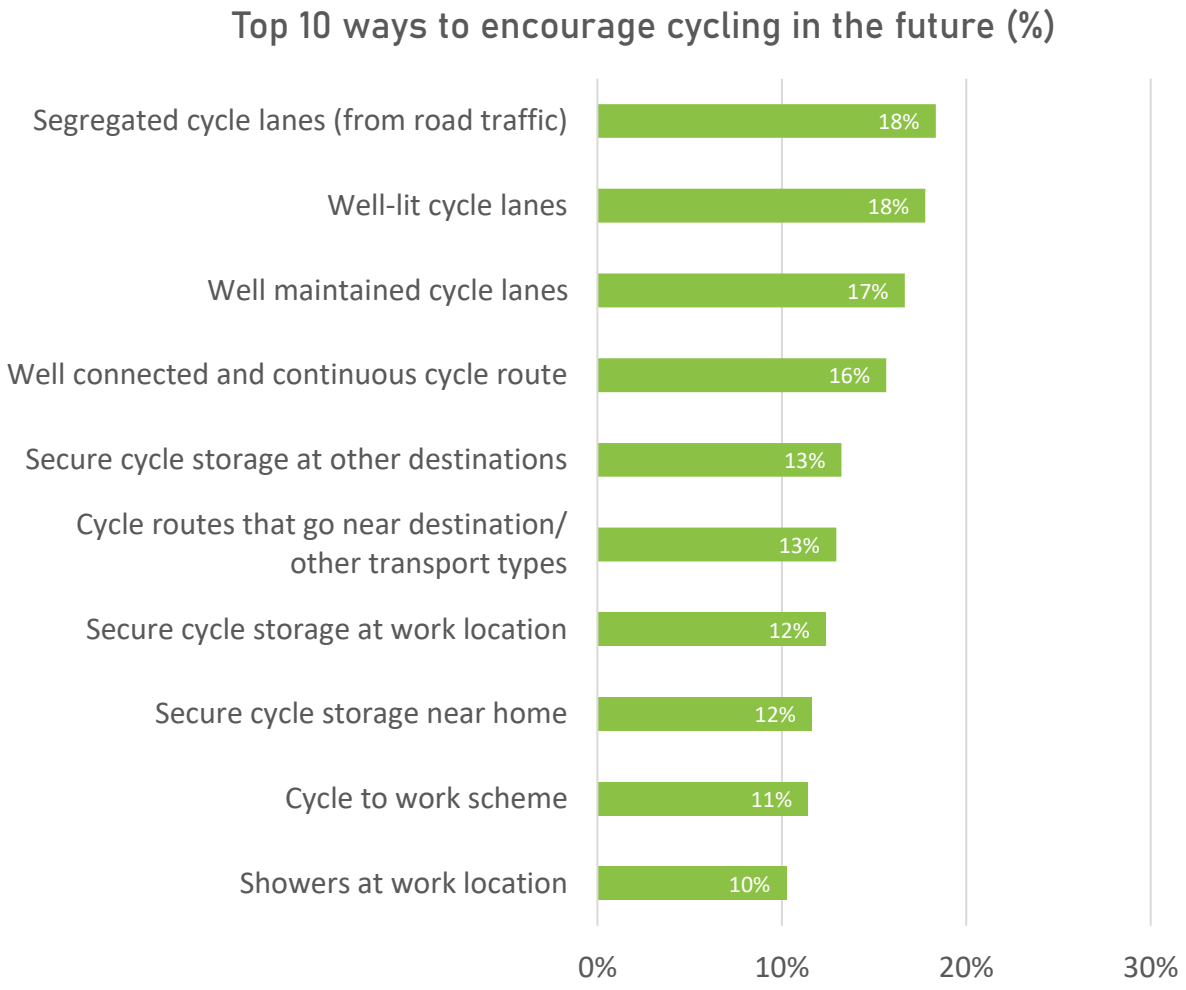


[1] Car clubs provide access to vehicles without ownership, offering short-term rentals to residents, visitors or businesses, typical by the hour.

2.0 Essex

2.3.2 Future Travel Behaviour and Choices:
Encouraging Future Use

2.3.2 Encouraging Future Use



Cycling

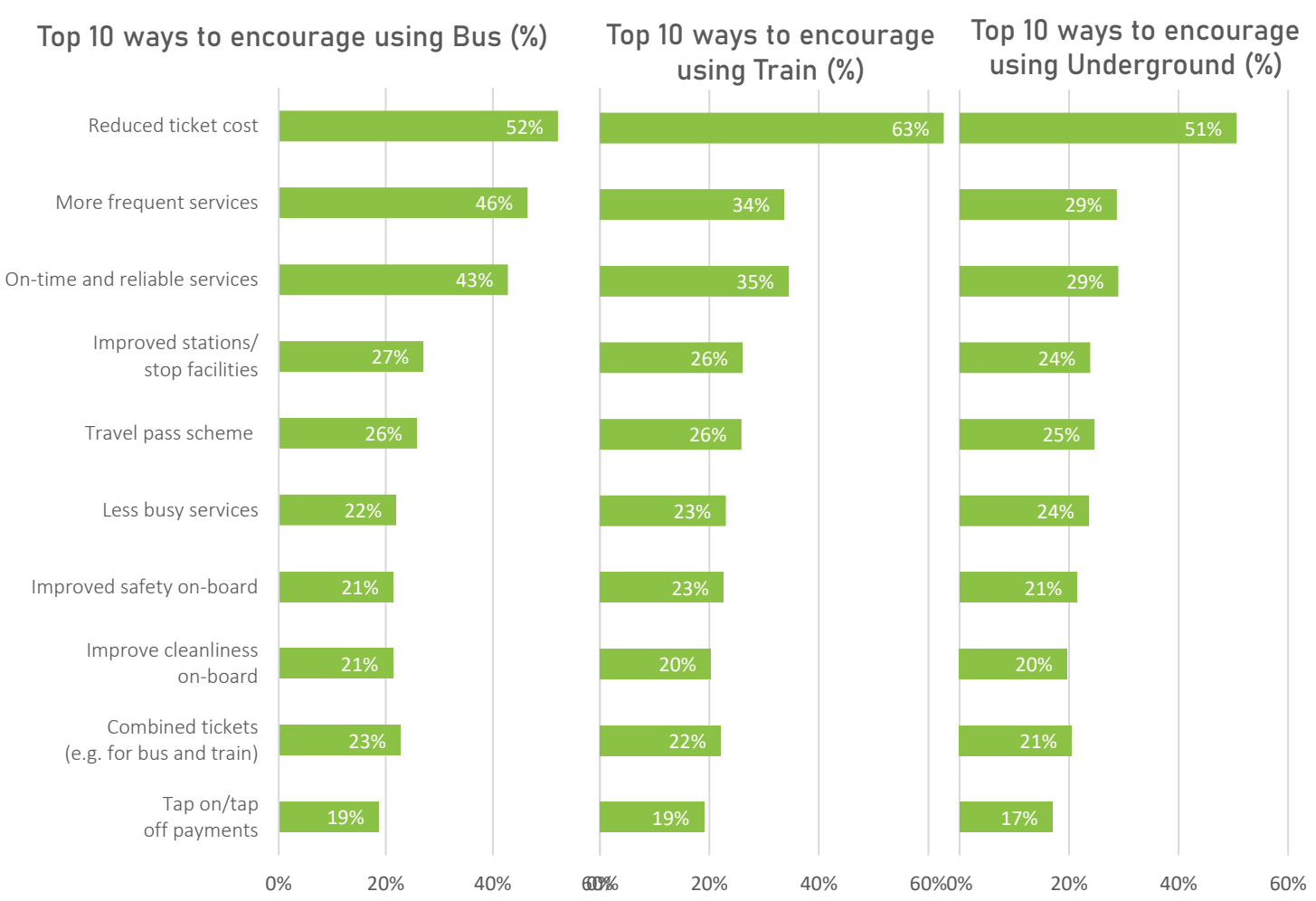
Respondents were asked about ways that would encourage them to cycle in the future.

All items have a similar level of response inferring that a combination of ways could encourage those in Essex to cycle more in the future. Segregated cycle lanes (18%) and well-lit cycle lanes (18%) are the top two areas that would encourage more people to cycle. The latter is valued more by those aged 30-49.

Segregated cycle lanes are important in many of the districts, while lighting provision is particularly important in Uttlesford and Harlow.

In Rochford, maintenance is key, along with continuous cycle routes.

2.3.2 Encouraging Future Use



Public transport

'Reduced ticket cost' is the standout mention for encouraging future use across public transport modes.

Other notable interventions for encouraging future public transport use are 'more frequent services' and providing 'on-time and reliable services' - these factors are of particular importance for encouraging future bus use. For those aged 60+ these were the top two ways to encourage bus use, potentially reflecting this group's access to free travel passes from age 66.

Epping Forest is the district reporting significantly higher results than the other districts across each mode – particularly on reduced ticket costs, travel pass schemes and improving safety.

2.3.2 Encouraging Future Use

Walking

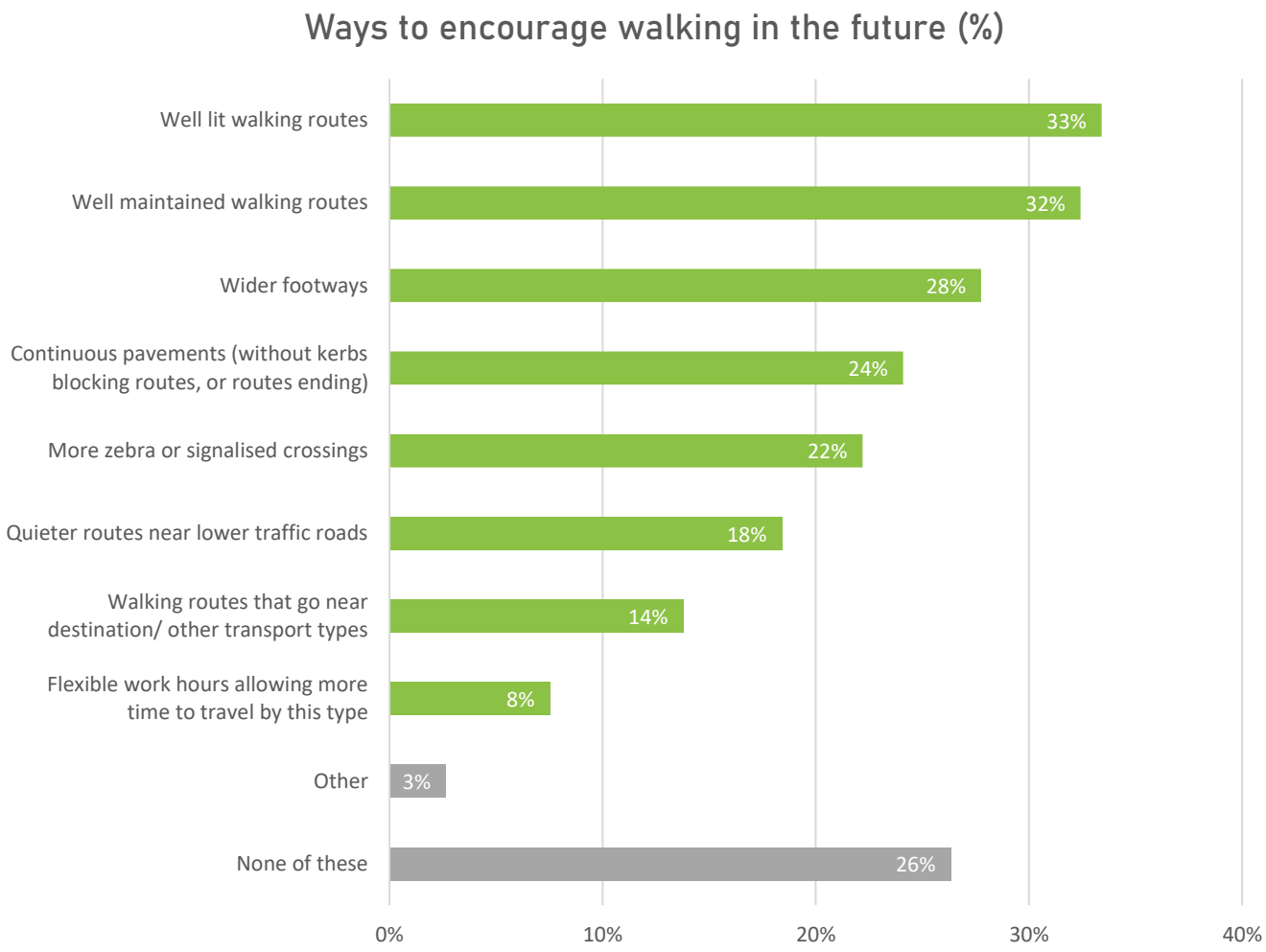
'Well-lit walking routes' and 'well-maintained walking routes' are the top mentioned ways to encourage walking in the future (33% and 32%).

Those in Epping Forest are more likely to want to see well-lit walkways than other districts.

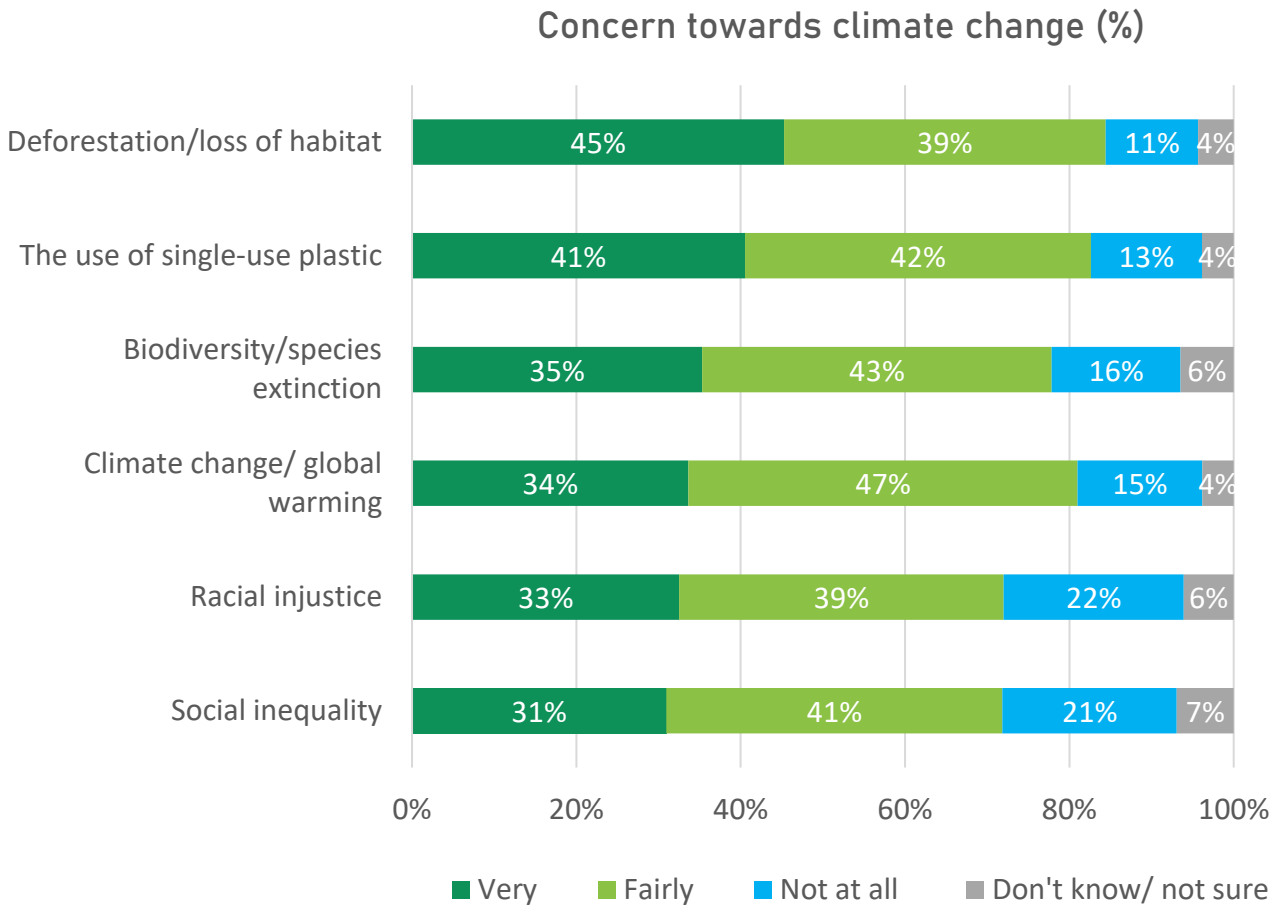
In Braintree, Maldon and Chelmsford there is a desire for continuous pavements, and in Colchester, more zebra or signalised crossings are desired.

Although less of an encouragement at an overall level, quieter routes near lower traffic roads would be a preference of those living in Rochford.

Notably, 37% of those aged 50+ reported that none of these factors would encourage them to walk, compared to only 15% of those aged 16-49, suggesting that improvements in walking infrastructure may be more effective for younger and middle-aged people.



2.3.2 Encouraging Future Use



Attitudes to climate change

Overall concern about global and societal issues is high in Essex.

Levels of concern for environmental issues are slightly higher than for social issues. This is a perception shared across the districts.

In some districts, however, societal issues do have greater importance. For instance, in Epping Forest and Basildon, 4 in 5 are very/fairly concerned by 'racial injustice', and 'social inequality'. Areas with lower support for these are Tendring, Rochford and Castle Point, where environmental concerns dominate.

2.3.2 Encouraging Future Use

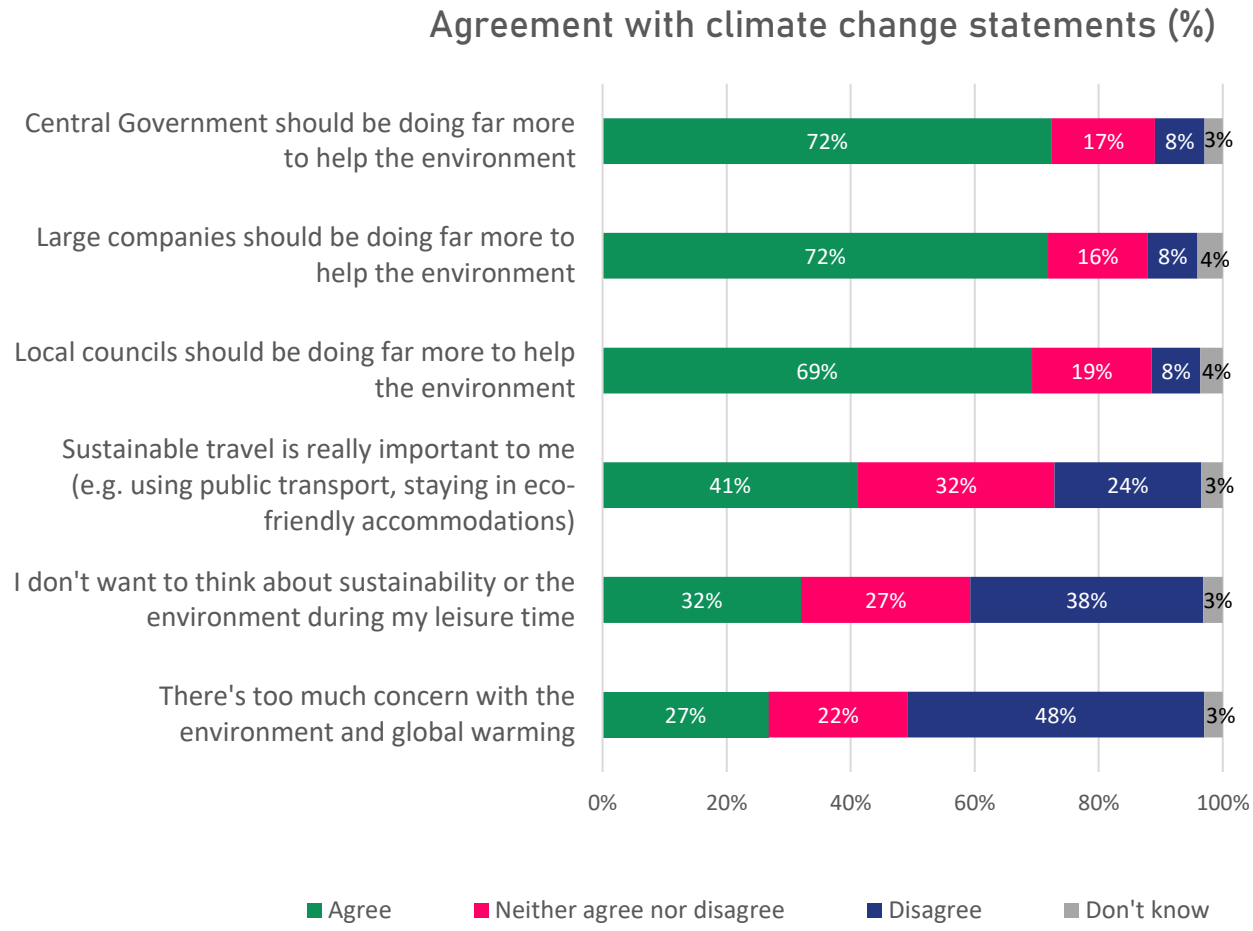
Attitudes to climate change

41% of respondents agreed with the statement ‘sustainable travel is really important to me’. This view is most prominent in Basildon.

There was also significant agreement that local councils, large companies and central government should all ‘be doing far more to help the environment’.

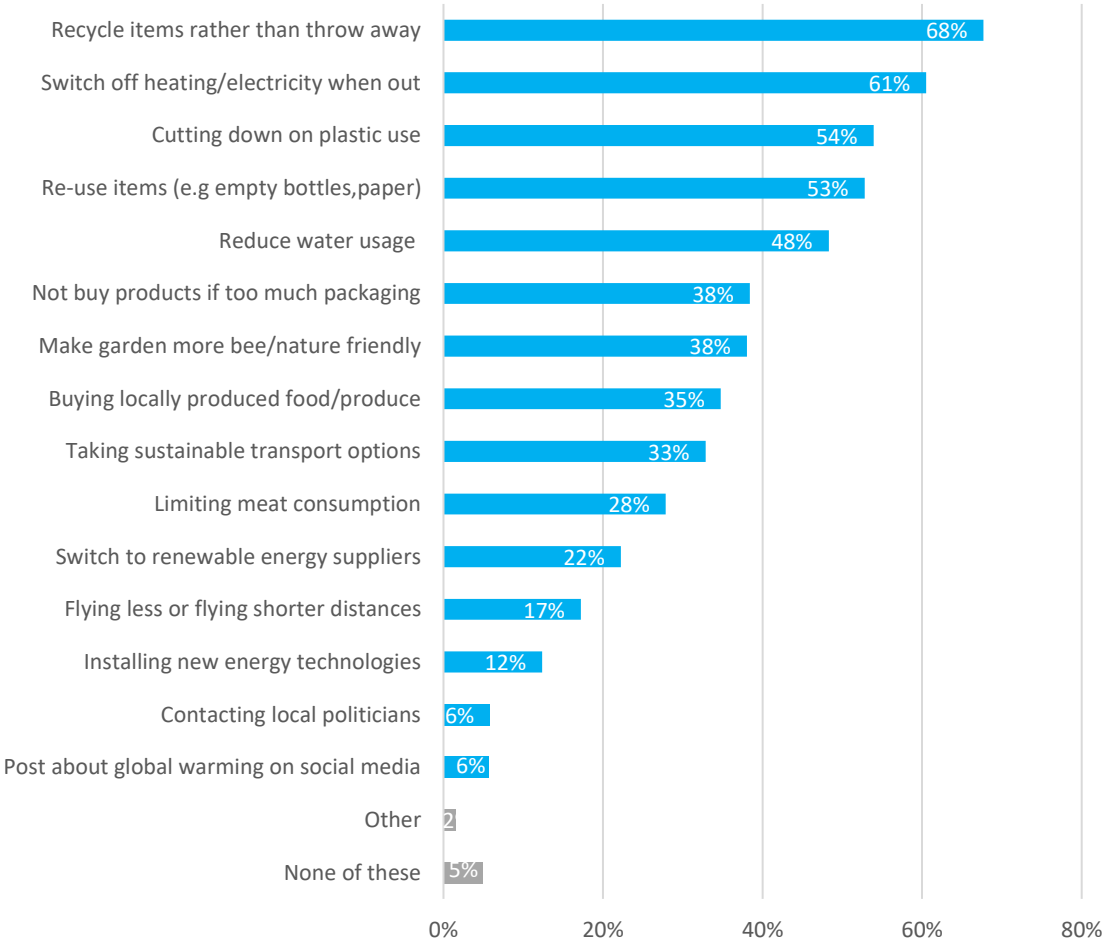
There was, however, a notable minority (27%) who do say they agree ‘there’s too much concern with the environment and global warming’. Harlow and Maldon respondents are more likely to state this than other districts.

A further 32% agree they prefer not to ‘think about sustainability or the environment’ during their leisure time. More of those living in Basildon (38%) agree with this statement than average in Essex.



2.3.2 Encouraging Future Use

Personal behaviours carried out to help the environment (%)



Attitudes to climate change

67%
state it is very/somewhat important to make sustainable choices when travelling (e.g. using public transport, like walking or cycling)

Generally, people are carrying out easy to do behaviours to help improve the environment, such as recycling, switching off heating, and cutting down on plastic use.

Two thirds state it is important to be sustainable when travelling, and only a third are currently 'taking sustainable transport options', suggesting there is need to drive thoughts into actual behaviours. Sustainable travel is lower in Castle Point and Tendring, while significantly higher in Epping Forest, potentially reflecting density of public transport services.

2.3.2 Encouraging Future Use

Attitudes to climate change

Views on suggested scenarios to reduce environmental impact

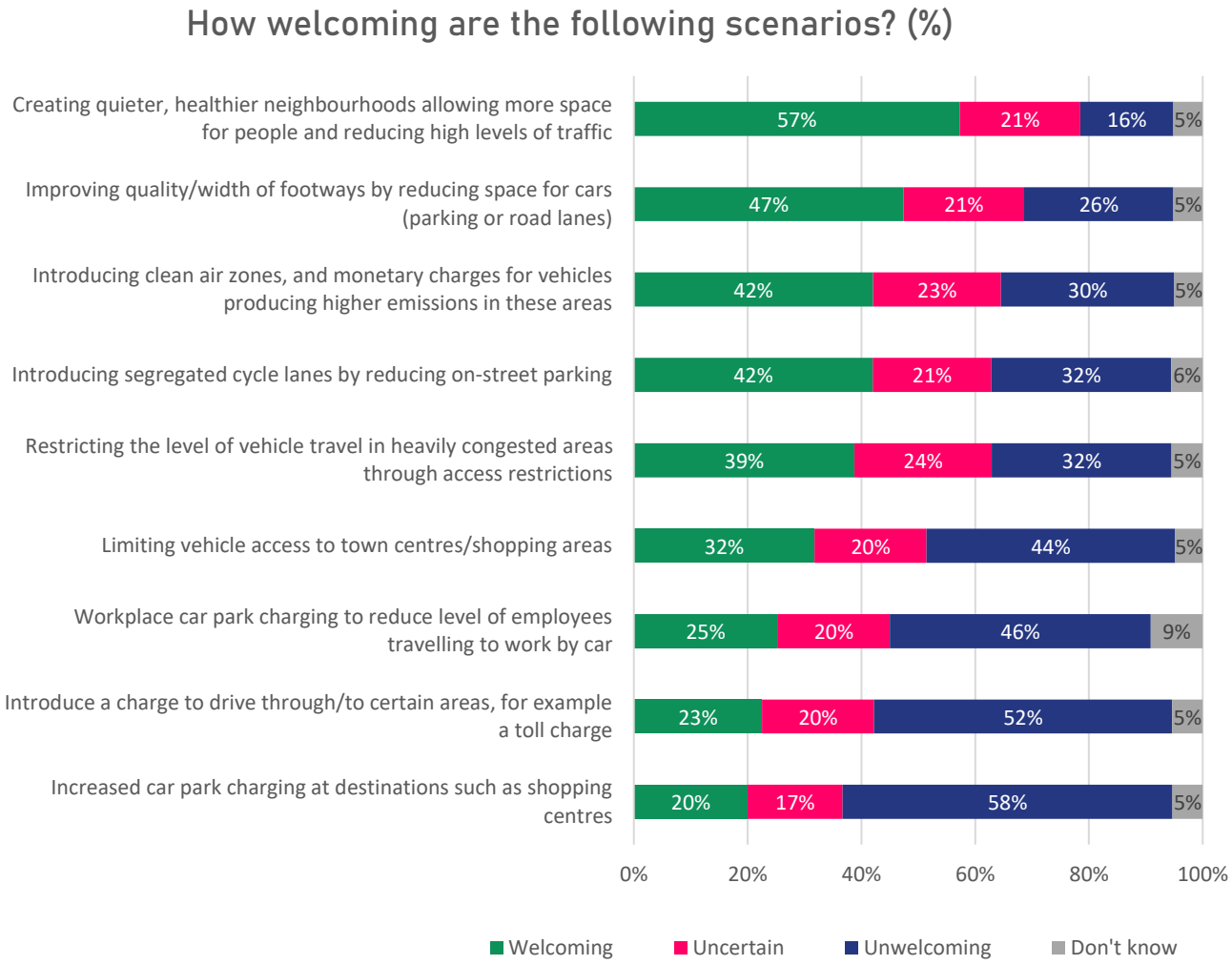
Scenarios that improve the environment to increase walking and/or cycling were more likely to be welcomed than not. For instance, quieter neighbourhoods allowing for more space, reducing space for cars and creating clean air zones.

Scenarios involving charging were less welcomed – with 58% against increased car park charging at shopping centres.

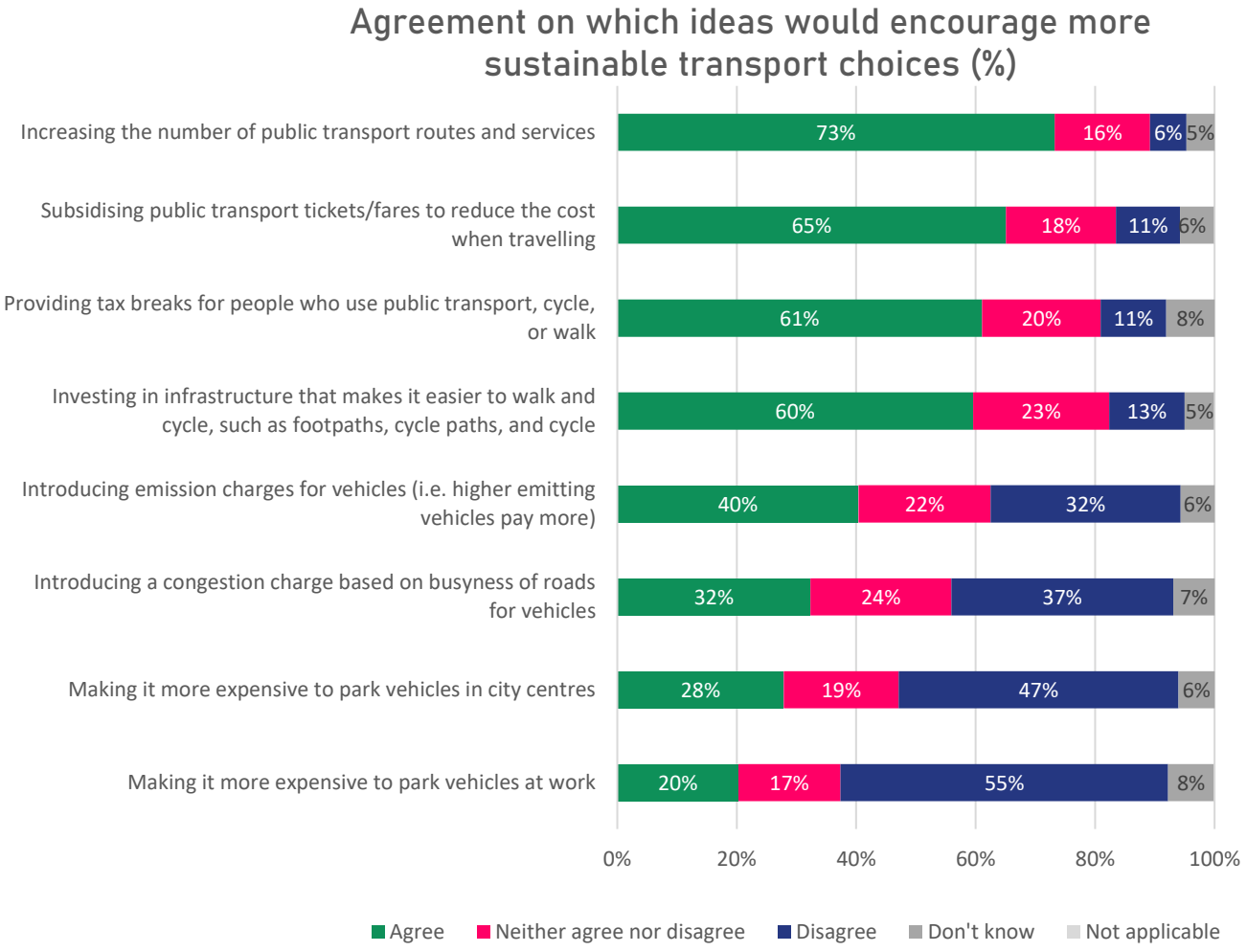
Tendring was one district where none of these ideas were supported by a majority of respondents. Harlow, Castle Point, Braintree preferred the quieter neighbourhoods more so than other ideas.

"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 scenario **least likely to be welcomed.**



2.3.2 Encouraging Future Use



Attitudes to climate change

Views on suggested scenarios to encourage sustainable transport choices

73% of respondents agreed that "increasing the number of public transport routes and services" would encourage more sustainable transport choices.

'Subsidising public transport tickets',, 'providing tax breaks', and 'investing in infrastructure' would also benefit greener travel.

However, initiatives that financially penalise people, through the introduction of charges, were less likely to be considered as having a positive impact – with 55% against the idea of making it more expensive to park vehicles at work.

At a district level, those living in Epping Forest were more in favour of a congestion charge (44%), likely linked to being on the boundary of the London Ultra Low Emission Zone and closer to Congestion Charge Zone. For those living in Castle Point, investing in infrastructure to walk and cycle is less likely to encourage more sustainable transport choices.

2.3.2 Encouraging Future Use

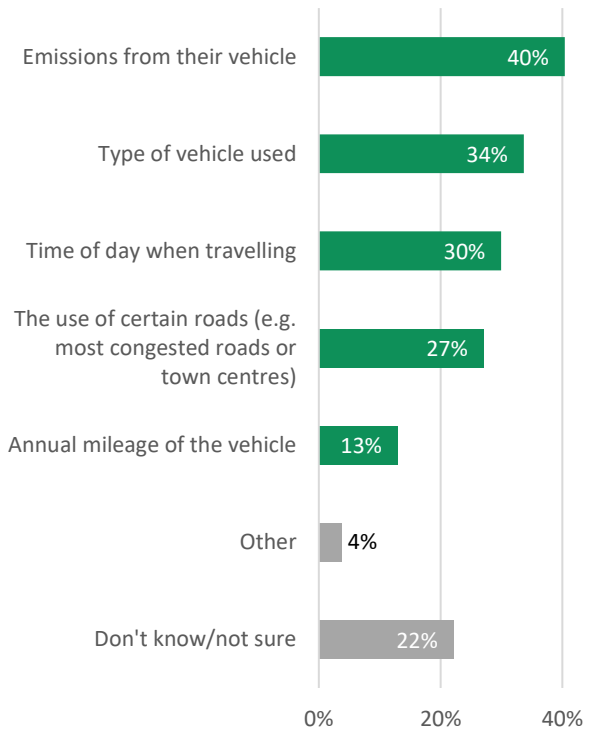
Scenarios for future investment – road charging

40% of respondents said they thought 'emissions from their vehicles' was the scenario road charging should be based on. This was particularly high in Rochford (47%), but lower in Tendring (28%), where a third were not sure about the best scenario for road charging.

The 'type of vehicle used' was stated as a base by 34% of respondents, and this view was notably stronger in Epping Forest and Basildon, while Uttlesford residents thought that 'time of day when travelling' would be the best scenario for road charging to be based upon.

Epping Forest did not agree with charging based on congested roads.

'Annual mileage' (13%) 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?"

2.3.2 Encouraging Future Use

Scenarios for future investment – top priorities for funding

Improvements with the broadest benefits came out top on this priority ranking exercise. Priorities for the largest proportion of respondents were:

- Improving condition of road (58%)
- Increasing number of available public transport services (48%)

'Improving footway quality' and 'subsidising ticket cost for local buses' were also supported by more than 2 in 5. By district, 55% of those in Castle Point want better quality footways. Subsidies are preferred more so by those in Basildon and Epping Forest.

Investing in EV charging points was ranked less highly, likely because fewer own such a vehicle.

Investing the funding outside of transport (e.g. more generally), was not received well, with only 12% of Essex respondents considering it as a top 3 priority for funding.

Top 5 priorities ranked in top 3 (%)*	
Improving condition of road (e.g. filling pot-holes)	58%
Increasing number of available public transport services (e.g. bus, train)	48%
Improving footway quality	45%
Subsidised ticket cost for local bus services	41%
Widely-available EV charging points	18%

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

"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?"

2.3.2 Encouraging Future Use

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

In Essex, the fairest way of addressing the funding gap is either to implement a road user charge based on 'vehicle emission level' (34%) or 'size and weight of the vehicle' (33%).

'Increasing the taxes on other types of vehicles' and 'allocating a portion of existing tax revenue towards transport infrastructure' closely follows.

Exploring these scenarios by district, taxes on other types of vehicles is by far the leading scenario in Maldon, while road user charging based on size and weight is highest for those in Epping Forest. Uttlesford and Rochford would like to see a portion of existing tax revenue used for transport infrastructure.

Reducing Government spending on transport was the least likely of the scenarios to be ranked in the top 3, and this was consistent across the districts.

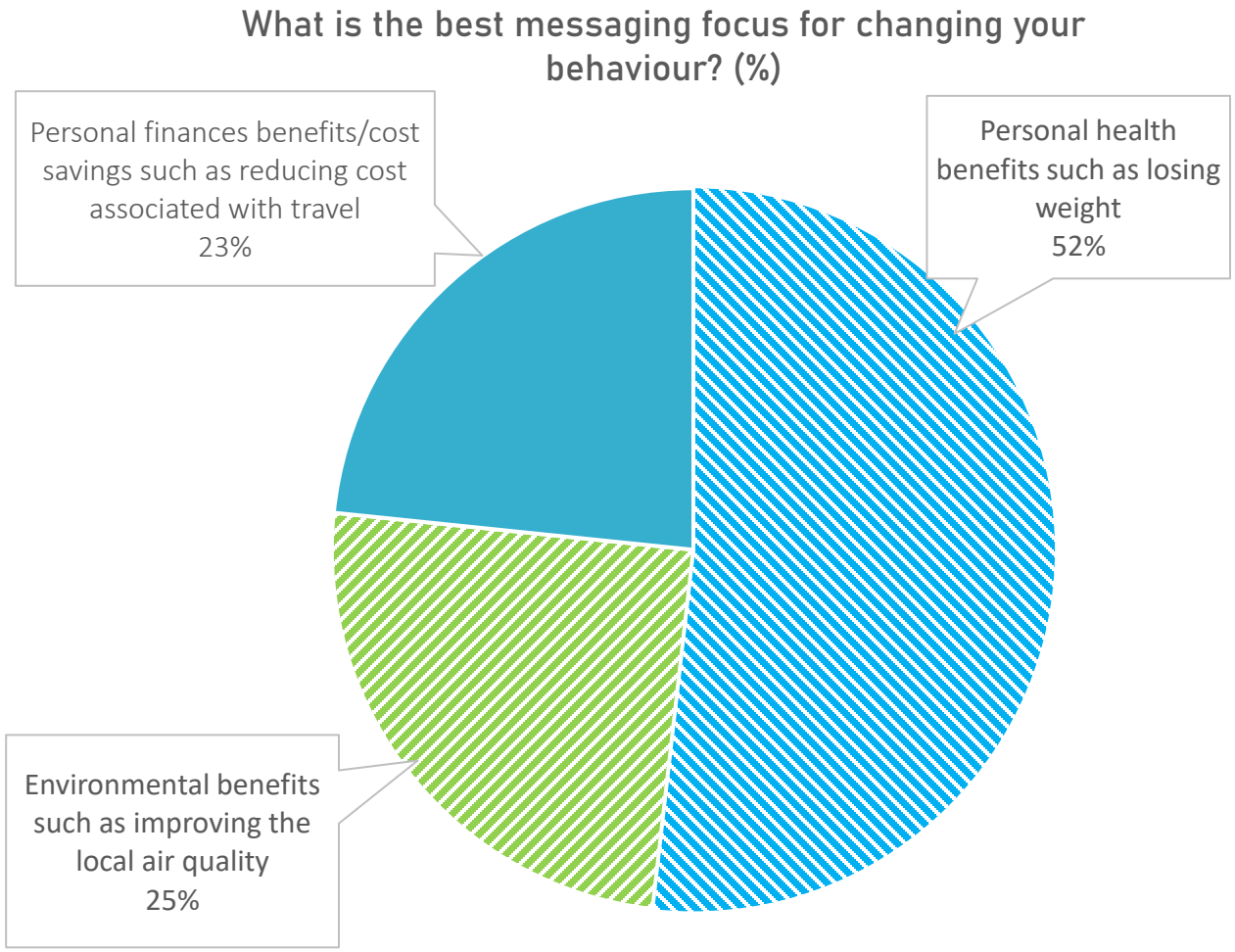
Top 5 priorities ranked in top 3 (%)*	
Implement a road user charge based on vehicle emission level	34%
Implement a road user charge based on size and weight of vehicle	33%
Increase taxes on other types of vehicles, such as electric vehicles and hybrid vehicles	31%
Allocate a portion of existing tax revenue to be used for transport infrastructure	30%
Seek additional funding from private companies	19%

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

"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?

2.3.2 Encouraging Future Use

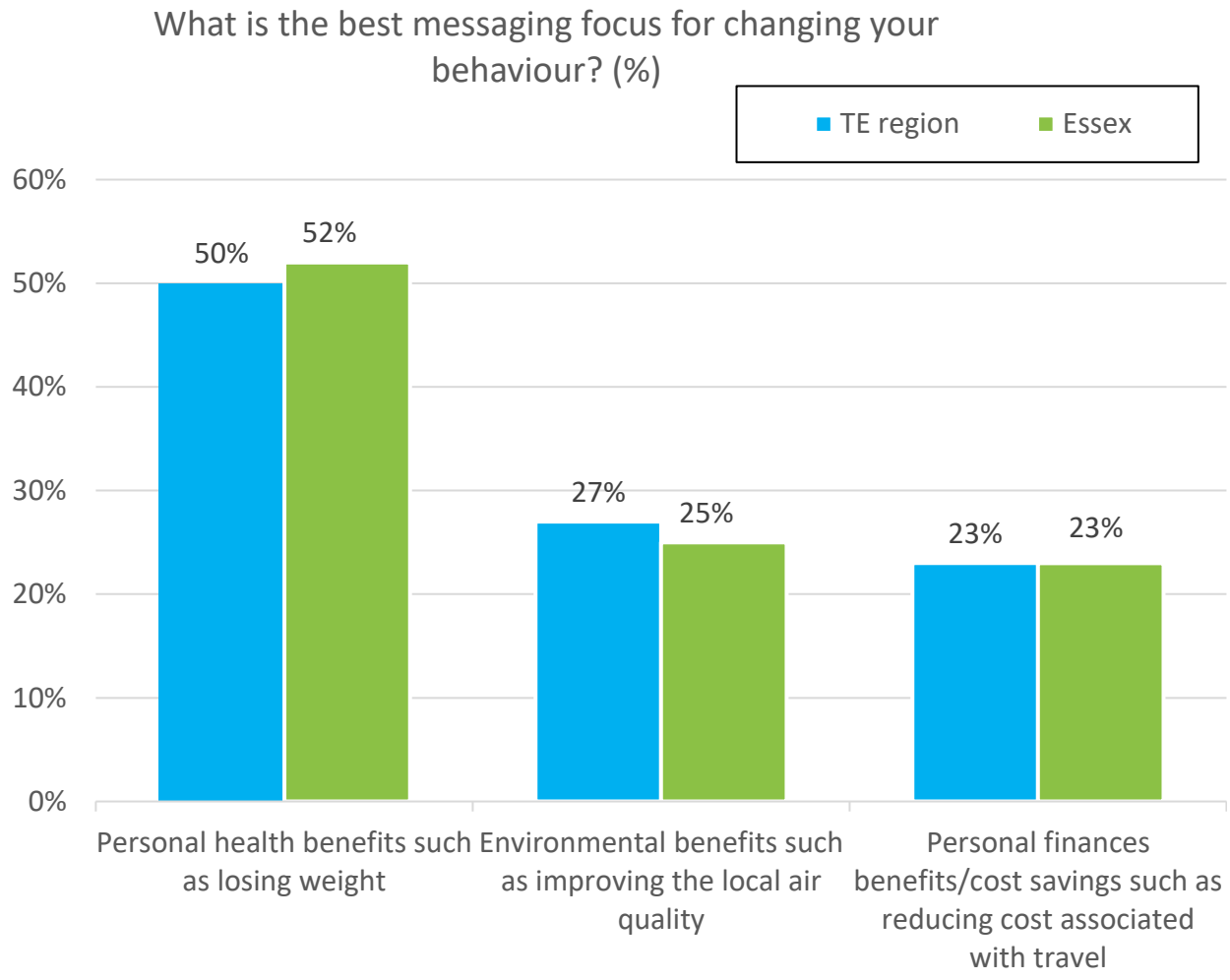
"Imagine you're looking to incorporate more cycling or walking into your daily routine. Your local area wants to encourage residents to get moving, but with so many options available, they need your input. Three different campaigns have been launched, each with a unique message. Which one would most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



2.3.2 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 walk over the car for everyday activities?"

Among respondents in Essex, around half said 'Personal health benefits' would be the most inspiring campaign message to encourage them to choose to bike or walk over the car for everyday activities. A quarter said they would be most inspired by 'Environmental benefits' and around a quarter said 'Personal finance benefits' would most inspire them.



2.3.2 Encouraging Future Use

Personal Health Benefits

52% of respondents feel a health-related message is the best way of inspiring them to bike or cycle for everyday activities. A key reason was that it resonated personally. Health is important at an individual level and is a key motivator – *"it doesn't matter about anything else if you don't have good health."*

The tangible benefits to health this message evokes have the power to reinforce sustainable travel behaviours.

Weight loss was a notable specific benefit and wider health benefits were also important. These were recognised as benefits to both mental and physical health.

The opportunity to include exercise in day-to-day travel routines was viewed positively - improving health and saving time/money.

The message's potential to encourage healthier choices within society was also seen positively along with a potential positive impact of relieving pressure on the NHS.

Some barriers to consider when promoting walking and cycling as these may not be appropriate for every journey or for everyone, sometimes due to existing health conditions or related to age. Additionally, the safety and quality of the roads in the area for walking and cycling were noted concerns.

2.3.2 Encouraging Future Use

Environmental Benefits

25% of respondents are most inspired by an environmental message.

Unlike the other two messages, which focus on a personal reward, this message can appeal for the opposite reason by offering a wider, communal benefit.

This message was also considered to have broader appeal as it was not limited by personal circumstances related to weight or wealth.

This message was inspiring when it aligned with individuals' existing attitudes towards the environment.

There was notable emphasis on the impact for future generations and a wider narrative around climate change and helping the planet.

A high proportion of those inspired by an environmental message placed value on the associated benefits for community/ population health and wellbeing that could be driven by improved air quality.

2.3.2 Encouraging Future Use

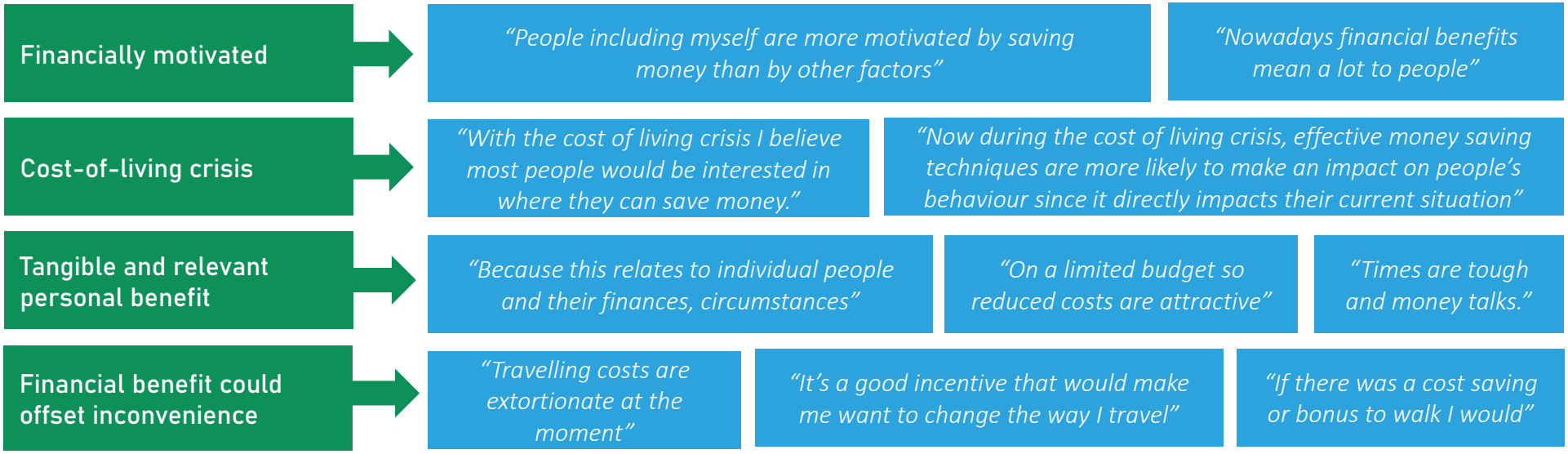
Personal finance benefits/cost savings

The tangible benefit of saving money was a highly relevant and motivating incentive among the 23% who said they would be most inspired by a financial message.

Recognising that both themselves and others were struggling financially at the moment, the cost-of-living crisis resonated with this audience.

Further, the high price of travel was viewed as a worthwhile saving for potentially sacrificing some levels of convenience.

"If you illustrated the cost of a short trip over a year and equated it to something tangible they could have bought or an average sum of money saved."



3.0 Conclusions and Opportunities

3.0 Conclusions and Opportunities

Key takeaways of travel behaviours and attitudes in Essex

- Of those surveyed, at the time of asking, 'car' and 'walking' were the most used modes of transport across all journey purposes. Bus is the third most used (25%), and is more common among respondents in Epping Forest, Colchester and Chelmsford. Rail travel is used by 14%, despite 32% having it available to them. Cycling is more limited, with only 7% reporting to travel in this way currently.
- People choose transport based on a variety of factors. The car (as a driver and passenger) is that it is more convenient (63% and 55% respectively), walking is for shorter journeys (53%), the train is fast at getting to a destination (44%), and the bus enables one to get to and from where they need to go (44%).
- Across the top 10 most used transport modes, the most common trip purposes are food or grocery shopping, work (including volunteering), visiting friends or relatives, and leisure and entertainment.
- Travel by car/van (as a driver) or walking are carried out most frequently, while car (as a passenger), bus and train are carried out less frequently at around 1-2 days a week.
- Only 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. Respondents intend to increase travel by bus, rail and cycling.

3.1 Conclusions and Opportunities

Walking

Of those surveyed, walking is the most used mode of transport and respondents suggest this will be their leading mode of transport for the next 12 months.

Walking is mainly used for leisure time (54%), for grocery shopping (50%) and getting to work (44%). It is also used when combining multiple modes, such as with bus, car or train.

Satisfaction ratings for local walking and wheeling infrastructure are rated moderately at 41%, and 26% rate this poorly.

Respondents' experience of walking is mixed, with a notable minority sharing that destinations are walkable (43%) and have safe crossings (40%). Though a quarter think walking infrastructure is not well-maintained (24%), and poor surface quality is the main concern among Essex respondents (47%).

This infers that the quality of the walking areas could be improved for Essex respondents.

Weather is the top reason for reducing walking (29%) as a transport mode in the future.

For those who do not walk, the biggest barriers are time constraints (24%), safety concerns regarding pavement lighting (24%) and fitness level (23%). This is apparent across districts, though there are further safety concerns relating to walkways being close to busy roads in Braintree. Fitness level is a top barrier for those older than 60 years of age.

Respondents would be encouraged to walk in the future by well-maintained and well-lit walking routes. Those in Epping Forest are more likely to want to see well-lit walkways than other district areas. Braintree, Maldon and Chelmsford desire continuous pavements, and Colchester request more signalised crossings.

Two thirds of respondents think it is important to make more sustainable travel choices, and additionally, 60% of respondents support further investment into infrastructure making it easier to walk.

Opportunities

avoid, safety and maintenance are key concerns. To help encourage walking, the survey results show that there could be:

Investment in safer, well-maintained walking routes: Improving the footpath infrastructure so that is well-lit and maintained for walking would address reported barriers. Ensuring signalised crossings are in place for busier areas, like Colchester, and providing paths that are continuous. This will benefit all those currently walking, making it safer and easier to walk in their local area. And further enable more to choose this as a sustainable alternative for journeys

3.1 Conclusions and Opportunities

Car Use

The car is the second most used transport mode in a typical week among the survey respondents. Based on their current understanding, the car is intended to be the second most used transport mode in the next 12 months.

It is used most when food/grocery shopping (77% for drivers; 62% for passengers), commuting to work (73% for drivers), visiting friends/relatives (58% for drivers; 55% for passengers), or leisure and entertainment (53% for passengers).

Convenience (62% for drivers; 55% for passengers) is cited as the main reason for using the car. Parents will often use the car when taking their child to school, as time constraints or distance limit alternatives to car. It is also used to as the main way to get to the airport when going on holiday. Some combine car with other modes, with car and walking the third top combination.

Current conditions of roads could be improved, with only 16% very/fairly satisfied with the condition. Costs are a deterrent, with fuel costs the main barrier or reason to reducing car use in the future. This view is most prominent among those below 49 years old and in Braintree.

Electric Vehicles (EVs)

Adoption of EVs is low, with 6% of car users owning an EV or plug-in hybrid. Private home charging is mostly accessible, but less so for workplace charging. 29% of respondents indicate they intend to purchase/lease an EV in the next 5 years. The costs associated with purchasing an EV is the biggest barrier (56%), mostly among men, ages 50+ and those on £25-54,999k. For 43% there are the practical challenges of ensuring access to infrastructure. These trends are like those reported at an overall TE level.

Connected and Autonomous Vehicles

CAVs are an area of uncertainty among most respondents, with just 33% indicating they would be willing to use one if it was available. There is more apprehension in Tendring and Braintree, while Epping Forest is more in favour.

The barriers to adopting this technology are related to technology fears (53%) or personal security concerns (48%). This aligns to results seen across the TE region.

Car Sharing

Formal car sharing with other people and car clubs/ hiring are two transport modes used by very few respondents. Car sharing is considered not as secure as driving by yourself, inflexible and is not private. Personal security fears are a concern of women, those aged 30-49, and those from Basildon. Uttlesford respondents are more likely to prefer the privacy and flexibility of not car sharing. Preference for your own vehicle is leading barrier to car clubs – most notable among men, those aged 50+, on £55k+ or from Epping Forest.

3.1 Conclusions and Opportunities

Car Use

Opportunities

The survey highlights that using the car will continue to be the case in the next 12 months among these respondents, although road conditions and costs are a limitation. Respondents indicated an interest in being more sustainable in their transport choices, and there are ways in which to encourage a shift from petrol or diesel car to more sustainable choices in the future to help tackle the key barriers to uptake.

Responses from the survey shows there is an opportunity to:

Wider availability of charging and tackling purchase costs of electric vehicles (EVs): To address these issues, advocate for increasing the government grants for new public chargers and consider regulations requiring workplaces to offer charging stations. Greater focus on the longer-term fuel and maintenance savings for EVs could also incentivise adoption.

Tackling these cost and infrastructure barriers could help accelerate the shift towards EVs as a cleaner alternative to petrol or diesel-fuelled cars which are proving costly for users.

Targeted campaigns and additional research for increasing car sharing adoption: Any research and communication campaigns could focus on the safety and flexibility aspects in relation to car sharing. 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.

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

Addressing technology fears via educational campaigns: New technologies such as CAVs face concerns from respondents, with technology fears being most prominent. There are areas more in favour of such technology, e.g. Epping, but with apprehension amongst many developing targeted campaigns that educate would increase understanding.

3.1 Conclusions and Opportunities

Cycling

Despite 36% of respondents owning a bicycle, only 7% report they use bike as mode of transport in a typical week.

Cycling provision is not considered to be good in Essex, as only 21% rate this as very/good. A third (33%) state there is no provision or dedicated cycling infrastructure, and only 22% report there being separate bike lanes.

The key barriers and concerns of respondents is safety. Concerns with road traffic was the top barrier (42%) The lighting of cycling routes was third, after weather, as a barrier (34%). These concerns are most notable in Maldon. Fitness is less of a reason, affecting 20% of those not cycling, however it is third top reason for not cycling in Uttlesford.

Weather is a limiting factor too; an area that cannot be helped by transport authorities but will restrict the extent of travel.

Based on respondent's intentions, cycling is due to be higher than current levels. 20% of respondents intend to cycle more in the next 12 months.

With a suggested increase in uptake and with many wanting to make more sustainable transport choices, ways to encourage cycling include a combination of things, including segregated cycle lanes, well-lit and well-maintained lanes, and ~~a~~ continuous cycle routes.

Segregated cycle lanes are reported as important across the districts in Essex. Lighting is key for addressing the concerns of those aged 30-49 years, and those in Uttlesford and Harlow. Maintenance and having a continuous route is key for respondents in Rochford.

Opportunities

Like 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, there is an opportunity to:

- 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 traffic. Lighting should be improved to make people feel safer. 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.

3.1 Conclusions and Opportunities

Public transport & DRT

Bus

The bus is the most used mode of public transport (25%), with the main purpose of journeys being commuting to work. Areas with the highest satisfaction are the proximity of bus stop to the start of the journey, and buses offering a direct and safe service. A key limitation are fewer early/late services, where 29% are dissatisfied with the availability in their area. This likely links to why 58% are satisfied with the local bus services overall.

For respondents who use the bus, being able to get to and from where one needs to go is the main reason for use.

The biggest barriers to travel by bus among respondents is the inconvenient/non-direct routes (47%), reported highest among those aged 50+. Time constraints (39%) and infrequent services (44%) are also notable barriers. Creating more reliable, and frequent services are the top two ways of encouraging more 60+ year olds to use the bus.

For some the cost of buses deters them from using, particularly those aged 16-29 years old. Reducing the costs of tickets for buses is also the leading way to encourage further travel in the future.

Train

14% of Essex respondents use the train, similar to the TE average. Most respondents indicate an expectation their rail travel will increase. The majority are satisfied with local rail services (65%); satisfied with information provision on trains (73%), early morning/late night services (71%) and availability/capacity of services (70%).

Cost is a key deterrent – 53% of all train users are dissatisfied with the expense. It is also one of the leading reasons for not using the train, and the main way to encourage future use.

Demand-responsive Transport

Only 24% are aware of DRT, reflective of the limited number of DRT services in the region. Of those aware, only a minority have used it (38%). Interest in using in the future is limited, but slightly more so among disabled people.

Opportunities

- Invest in improving bus routes, scheduling and reliability: The survey indicates dissatisfaction with frequency, availability and indirect bus routes. Exploring options like dedicated bus lanes, to improve bus travel times and consistency, a review of current routes in the area, and introducing services in the early or late evening. This will make bus travel a more viable option to those who currently consider it inconvenient.
- Promote discounted public transport options: Fare reductions or discounts would ease the barriers associated with using the train and bus and make it more affordable and attractive to use.

3.1 Conclusions and Opportunities

Work and Shopping Behaviours

Working

65% of Essex respondents are currently working in a typical week, and work is one of the key reasons people are travelling by transport. Of this group, only 6% work from home all of the time, with the rest travelling to a place of work all or some of the time. 42% state they are unable to work remotely, with a further 18% mandated to be physically present. Only 15% can work flexibly and choose their own work location.

Travelling to work takes on average 33 minutes, and this is influenced by where people are travelling to get to work. In Essex, 69% of respondents are working within Essex. A further 25% work outside the TE region, with London a common location. Only a small proportion (1%) commute to Suffolk for work.

Shopping

Focusing on non-food shopping, respondents prefer to visit nearby towns (47%) or opt for a destination close to their home, which could encompass cities or towns.

There is, however, a preference for home deliveries, with 85% using home deliveries regularly or sometimes. 40% of respondents are receiving 1 delivery per week. Respondents are, however, less inclined to making home deliveries of food, with a quarter having never done this.

The level of online shopping is expected to stay the same for most. For 22% they will increase, with Harlow being the main area driving this. In the future, respondents are keen to see options for deliveries to be combined into one trip or delivered on day that reduces carbon emissions.

Opportunities

- Working from home: The survey results show that working in the office at least part of the time is a requirement for most. This means transport into the office is required. People will often use a variety of means, with car being one of these. One way is to explore and promote flexible work arrangements that will allow employees to work from home occasionally and rely less on their car for commuting.

- Promote combined deliveries with reduced emissions: Calling for delivery companies to offer same-day deliveries that combine packages from different retailers or utilise low-emission vehicles. This caters to their convenience needs while aligning with their interest in sustainability.

3.1 Conclusions and Opportunities

Working and shopping

Working

65% of Essex respondents are currently working in a typical week, and work is one of the key reasons people are travelling by transport. Of this group, only 6% work from home all of the time, with the rest travelling to the place of work all or some of the time. This is driven in part by the fact that 42% are unable to work remotely, with a further 18% mandated to be physically present. Only 15% can work flexibly and choose their own set up.

Travelling to work takes on average 33 minutes, and this is reflected by where people are travelling to get to work. In Essex, 69% of respondents are working within Essex. A further 25% work outside of the TE region, with London a common location. 4% travel to either Southend-on-Sea or Thurrock and only a very small proportion (1%) commute to Suffolk for work.

Shopping

Focusing on non-food shopping, respondents prefer to visit nearby towns (47%) or opt for a destination close to their home, which could be either cities or towns.

There is a preference for home deliveries, with 85% using home deliveries for non-food shopping regularly or sometimes. 40% of respondents are receiving 1 delivery per week. Respondents are less inclined to having home deliveries of food, with a quarter having never done this.

The level of online shopping is expected to stay the same for most. For 22% they will increase, with Harlow being the main area seeing this. In the future, respondents are keen to see options for deliveries to be combined into one trip or delivered on a day that reduces carbon emissions.

Opportunities

- Working from home: The survey results show that working at a specific location at least part of the time is a requirement for most. This means transport to a workplace is required. People will often use a variety of modes, with car being the most popular. Exploring and promoting flexible work arrangements that allows employees to work from home occasionally and rely less on their car for commuting would help reduce car use.

- Promote combined deliveries with reduced emissions: Calling for delivery companies to offer same-day deliveries that combine packages from different retailers or use low-emission vehicles. This caters to delivery choices while aligning with their interest in sustainability.

3.1 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 higher concern for environmental issues than social – with concern highest for deforestation/ loss of habitat (45%). Environmental concerns dominate more in Tendring, Rochford and Castle Point.

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

- For Councils, Government and companies to take more action to help the environment
- For the introduction of quieter neighbourhoods with reduced traffic, as well as clean air zones
- Offering more public transport routes / services, and investing in infrastructure of walking and cycling
- Increasing the number of public transport routes and services
- There are some inconsistencies in how people in Essex think about sustainable travel. 67% think it's important to travel sustainable, however less (41%) agree that sustainable travel is important to them, and only 33% consider themselves to be taking sustainable transport options currently. This highlights a disconnect between attitudes and behaviours, with respondents sharing that is important to do but are not actively travelling in this way.

Opportunities

- Bridge the gap between awareness and action: While 67% value sustainable travel, only 33% currently use such options. Implement strategies to bridge this gap, such as educational campaigns highlighting the environmental impact of travel choices; making sustainable options more convenient and accessible (e.g., dedicated cycling lanes, improved public transport schedules, quieter neighbourhoods with reduced traffic); and incentivising sustainable travel through reduced fares on public transport.

3.1 Conclusions and Opportunities

Funding

Respondents were asked to prioritise alternative opportunities to raise funding to address the future reduction in tax from fuel duty linked to the transition to EVs.

Monetary charges received mixed views, e.g. workplace charging, toll charges, or car parking charging. Nevertheless, Epping Forest was in favour of congestion charging, likely linked to being closer to the London Ultra Low Emission Zone and Congestion Zone.

The top priorities for funding in the future are:

- Improving road conditions
- Enhancing number of public transport services
- Upgrading footways

These are closely aligned with the ranking at a TE level. Respondents in Castle Point were more likely to want better footways. Subsidised bus tickets were rated in fourth place, and something preferred most by Epping Forest and Basildon.

Areas that are seen as less important are those that do not have wide transport benefits – e.g. specific named transport projects or increasing general funding for local councils.

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 or weight of the vehicle used –both seen as fair ways to address any gaps in funding.

Secondary to this were using an existing proportion of the tax revenue to support the gap.

Opportunities

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

- Allocate resources based on public priorities: Explore the implementation of a road charging scheme based on emissions or the size and weight of the vehicle used to generate additional funds for transportation improvements. The funding from this will be used to address improving road conditions and investing in upgrading the footways to better provide for walking, as well as enhancing the number of public transport services available.

3.1 Conclusions and Opportunities

Future messaging

Respondents were asked to decide upon which focus of messaging would help them make a choice about their travel behaviour. The messaging was to try and influence behaviour change 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 for Essex respondents.

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 well-being. This could be done via emphasising the energy boost 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.

- **Promote health lifestyle benefits**

Weight management was an area highlighted for messaging, but it should be done in a way that promotes an overall healthy lifestyle, as weight won't be relevant for everyone.

- **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 widespread adoption.

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

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

4.0 Appendix

4.1 Methodology

4.1.1 Sampling and Recruitment

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.

4.1.2 Data Collection

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

4.1.3 Data Analysis and Reporting

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.

4.1.4 Reporting of Questions

Reporting of Questions

This report conveys all of the key questions relating to the questionnaire outline shared on slide 69.

There are, however, questions that are not included within the report and this is due to the questions having a low base size of <30. Therefore, no data is shared for these questions. The Transport East overview report can provide a top level finding from the Transport Region as a whole for these respective questions.

Questions Not Included

The questions that were not included within the Essex report were:

Top 10 reasons for reducing...

- F4. You previously stated you will be decreasing your usage of the following transport type (s), for what reason (s)? - Reasons for reducing cycling; Reasons for reducing Underground use

4.0 Appendix

4.2 Essex – Current Travel Behaviours and Attitudes

4.2.1 Transport modes used in the last two days

Transport modes used (last two days)	Uttlesford*	Braintree	Maldon*	Chelmsford	Basildon	Brentwood*	Epping Forest	Harlow	Colchester	Tendring	Rochford*	Castle Point*
Car - owned/work driven by yourself)	84%	70%	68%	59%	53%	62%	58%	51%	55%	58%	56%	64%
Walk	45%	45%	38%	63%	55%	58%	68%	46%	55%	58%	68%	45%
Car – owned by yourself or someone else, with you as passenger	29%	25%	21%	29%	27%	27%	14%	27%	26%	25%	23%	33%
Bus	5%	9%	21%	27%	19%	19%	36%	13%	25%	15%	20%	13%
Train	14%	11%	13%	18%	17%	31%	16%	14%	13%	14%	19%	18%
Underground	12%	4%	7%	9%	7%	10%	35%	7%	2%	3%	4%	6%
Bicycle	5%	3%	2%	10%	6%	3%	10%	4%	8%	5%	6%	8%
Taxi/Minicab/ private hire vehicle	2%	2%	2%	3%	6%	0%	14%	6%	4%	1%	1%	1%

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

FIGURE 1: Top 8 transport modes used in the last two days by district (%)

4.2.2 Travel purposes in the last two days

Transport purposes (last two days)	Uttlesford*	Braintree	Maldon*	Chelmsford	Basildon	Brentwood*	Epping Forest	Harlow	Colchester	Tendring	Rochford*	Castle Point*
Work (including volunteering)	45%	57%	83%	61%	64%	44%	65%	62%	54%	58%	59%	44%
Food or grocery shopping	57%	53%	44%	52%	52%	57%	62%	56%	55%	58%	56%	46%
Visit friends or relatives	21%	31%	20%	25%	27%	30%	17%	29%	30%	24%	26%	25%
All other types of shopping	18%	14%	14%	20%	16%	15%	27%	17%	16%	13%	27%	20%
Going to a restaurant, pub or bar	14%	17%	13%	16%	10%	16%	23%	7%	10%	7%	15%	27%
Walking or cycling for leisure	13%	7%	14%	16%	13%	16%	8%	14%	15%	18%	11%	10%
Personal business – other	15%	10%	8%	19%	14%	11%	4%	6%	11%	19%	16%	7%
Entertainment	14%	7%	12%	12%	3%	17%	23%	4%	8%	9%	7%	11%
Taking your child/ren to/from school	2%	7%	11%	9%	10%	13%	7%	4%	7%	6%	6%	8%
Personal business – medical	12%	1%	10%	8%	7%	5%	6%	4%	9%	12%	4%	9%

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

FIGURE 2: Top 10 travel purposes in the last two days by district (%)

4.2.3 Transport modes used in a typical week

Transport modes used (typical week)	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Walk	70%	60%	52%	64%	67%	64%	62%	53%	58%	66%	72%	59%
Car – owned/work, driven by yourself	81%	73%	60%	61%	56%	63%	58%	63%	55%	60%	56%	64%
Bus	12%	19%	26%	35%	28%	19%	33%	14%	32%	21%	23%	21%
Car – owned by yourself or someone else, with you as passenger	30%	23%	20%	30%	18%	18%	20%	16%	19%	20%	26%	27%
Train	20%	6%	10%	22%	13%	21%	12%	9%	12%	12%	21%	21%

FIGURE 3: Top 5 transport modes used in a typical week by district (%)

4.2.4 Transport modes used in a 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%	62%	58%	56%	67%	70%	64%	59%	51%	68%	57%	63%	62%	74%
Car – owned/work, driven by yourself	65%	59%	36%	60%	69%	78%	63%	42%	49%	67%	44%	63%	72%	72%
Bus	25%	25%	30%	22%	18%	38%	25%	27%	29%	24%	36%	23%	16%	24%
Car – owned by yourself or someone else, with you as passenger	16%	29%	21%	23%	23%	21%	23%	11%	21%	22%	13%	23%	27%	22%
Train	17%	12%	18%	15%	18%	5%	15%	11%	13%	16%	8%	14%	18%	28%

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

4.2.5 Reasons for choosing to walk in a typical week

Reasons for choosing to walk (typical week)	Uttlesford*	Braintree	Maldon*	Chelmsford	Basildon	Brentwood*	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point*
It is a short journey	47%	48%	54%	54%	58%	52%	55%	54%	53%	46%	57%	60%
Is convenient	37%	46%	51%	37%	50%	32%	52%	43%	37%	42%	35%	55%
Better for the environment	49%	49%	27%	45%	41%	27%	40%	52%	42%	42%	32%	45%

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

4.2.6 Reasons for choosing to walk in a typical week

Reasons for choosing to driving a car (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+
Is convenient	66%	60%	43%	54%	69%	73%	63%	77%	66%	61%	59%	66%	62%	69%
Enables me to get to and from where I need to go	62%	60%	48%	51%	65%	74%	61%	66%	65%	60%	56%	65%	54%	65%
Always available when I need it / flexibility	55%	53%	39%	43%	60%	66%	54%	54%	62%	53%	51%	57%	46%	64%

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

4.2.7 Parking costs – willingness to pay

How much more are you willing to pay?	Uttlesford*	Braintree*	Maldon**	Chelmsford*	Basildon**	Brentwood**	Epping Forest*	Harlow**	Colchester*	Tendring**	Rochford**	Castle Point**
0%-20%	27%	37%		27%			45%		27%			
21%-40%	22%	8%		12%			7%		16%			
41%-60%	18%	5%		12%			9%		18%			
61%-80%	8%	5%		3%			11%		13%			
80%-100%	0%	2%		5%			9%		2%			
Don't know/Not sure	25%	42%		40%			19%		24%			

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

FIGURE 4: Parking costs willingness to pay by district (%)

4.2.8 Transport modes likely to use in the next 12 months

Transport modes likely to use in the next 12 months	Maldon	Harlow	Epping Forest	Colchester	Chelmsford	Braintree	Tendring	Basildon	Rochford	Brentwood	Castle Point	Uttlesford
Walk	69%	63%	82%	76%	76%	75%	76%	77%	80%	76%	65%	67%
Car – owned/work, driven by yourself	67%	67%	63%	61%	68%	71%	60%	62%	62%	71%	67%	77%
Train	60%	42%	53%	46%	66%	47%	46%	56%	62%	65%	57%	58%
Bus	55%	35%	58%	53%	54%	37%	35%	51%	47%	51%	44%	37%
Car – owned by yourself or someone else, with you as passenger	47%	36%	30%	47%	47%	43%	39%	42%	52%	39%	43%	51%
Underground	27%	31%	70%	27%	44%	31%	23%	44%	47%	54%	28%	52%
Taxi or Minicab or private hire vehicle	23%	27%	40%	19%	22%	18%	15%	28%	37%	35%	29%	39%
Bicycle or Pedal cycle	30%	25%	14%	24%	25%	18%	21%	16%	21%	20%	21%	15%
Coach	5%	9%	5%	12%	8%	7%	9%	11%	8%	9%	9%	8%
Car – hired/rented	7%	5%	0%	3%	3%	5%	1%	4%	3%	4%	9%	10%

FIGURE 5: Top 10 transport modes likely to use in the next 12 months by district (%)

4.0 Appendix

4.3 Essex – Understanding the factors that may influence future travel behaviour and choices – Barriers and decline in use

4.3.1 Barriers to cycling

Barriers to cycling	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Safety concerns – cycling alongside road traffic	46%	42%	53%	45%	30%	47%	48%	35%	43%	39%	48%	37%
Weather	41%	33%	38%	32%	28%	39%	36%	36%	30%	34%	40%	29%
Safety concerns – lighting along cycle routes	24%	27%	40%	27%	27%	22%	28%	32%	37%	26%	31%	26%
Fitness level	33%	18%	18%	17%	19%	10%	24%	21%	16%	22%	24%	15%
Not a direct route/inconvenient	26%	16%	12%	17%	13%	22%	12%	30%	23%	11%	24%	14%
Time constraints (e.g. it can take too long to get to a destination)	22%	19%	20%	19%	7%	26%	15%	20%	18%	13%	20%	11%
Lack of cycle routes/signage	21%	16%	17%	12%	13%	18%	17%	11%	14%	18%	21%	10%
Lack of safe storage at destinations	15%	12%	17%	20%	10%	12%	15%	23%	18%	12%	14%	9%
Physically unable to	17%	12%	15%	11%	14%	6%	19%	7%	14%	21%	11%	11%
Cost of purchasing or hiring a bicycle	9%	15%	10%	15%	12%	12%	14%	14%	14%	12%	13%	6%

TABLE 6: Top 10 barriers to cycling by district (%)

4.3.2 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 – cycling alongside road traffic	44%	40%	27%	40%	49%	48%	41%	46%	33%	45%	37%	45%	44%	38%
Weather	35%	32%	23%	27%	44%	39%	33%	42%	27%	36%	28%	37%	33%	28%
Safety concerns – lighting along cycle routes	26%	32%	36%	39%	23%	16%	28%	27%	27%	30%	28%	30%	29%	25%
Fitness level	17%	22%	14%	16%	20%	30%	19%	23%	25%	18%	17%	20%	17%	25%
Not a direct route/inconvenient	17%	19%	17%	24%	17%	10%	18%	13%	16%	18%	13%	18%	22%	21%
Time constraints (e.g. it can take too long to get to a destination)	16%	18%	11%	22%	18%	12%	16%	16%	15%	18%	8%	19%	18%	27%
Lack of cycle routes/signage	15%	15%	15%	17%	16%	11%	15%	16%	13%	16%	13%	17%	15%	20%
Lack of safe storage at destinations	15%	15%	9%	15%	20%	11%	15%	13%	12%	15%	13%	17%	12%	15%
Physically unable to	11%	16%	6%	9%	16%	24%	13%	16%	33%	8%	17%	14%	11%	6%
Cost of purchasing or hiring a bicycle	10%	15%	11%	14%	15%	8%	12%	22%	15%	12%	15%	15%	10%	9%

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

4.3.3 Barriers to public transport – bus

Barriers to public transport BUS	Uttlesford	Braintree	Maldon*	Chelmsford	Basildon	Brentwood*	Epping Forest*	Harlow	Colchester	Tendring	Rochford	Castle Point*
Not direct route/inconvenient	46%	56%	53%	50%	31%	44%	56%	49%	50%	40%	45%	57%
Infrequent services	45%	54%	62%	48%	32%	42%	54%	47%	43%	36%	43%	36%
Time constraints (e.g. it can take too long to get to a destination)	44%	42%	45%	38%	31%	32%	50%	50%	31%	35%	38%	38%
Ticket costs	33%	36%	18%	35%	30%	29%	36%	35%	39%	43%	47%	33%
Does not go to destinations I need	41%	40%	38%	30%	33%	30%	43%	40%	34%	31%	30%	34%
Safety concerns – other's behaviour around you	21%	23%	34%	20%	21%	19%	24%	22%	19%	26%	17%	22%
Lack of awareness of the services available	15%	25%	19%	24%	15%	9%	26%	23%	22%	17%	21%	25%
Limited early morning/evening services available	12%	27%	27%	15%	13%	16%	37%	18%	23%	19%	10%	14%
Health concerns – worried about getting ill from others	6%	18%	21%	13%	24%	13%	28%	15%	19%	18%	20%	23%
Travelling with other people (e.g. children) makes it difficult to travel by public transport	18%	18%	13%	10%	16%	17%	29%	12%	11%	15%	3%	12%

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

TABLE 7: Top 10 barriers to public transport – Using Bus, by district (%)

4.3.4 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	45%	50%	32%	44%	56%	54%	46%	55%	48%	48%	42%	46%	52%	42%
Infrequent services	43%	46%	35%	42%	50%	48%	44%	40%	46%	46%	37%	45%	48%	41%
Time constraints (e.g. it can take too long to get to a destination)	39%	39%	38%	31%	44%	46%	37%	42%	40%	38%	38%	38%	36%	60%
Ticket costs	34%	37%	40%	34%	38%	28%	35%	40%	36%	37%	45%	35%	34%	31%
Does not go to destinations I need	35%	36%	22%	32%	43%	43%	36%	27%	33%	36%	32%	40%	31%	32%
Safety concerns – other's behaviour around you	21%	23%	31%	16%	24%	19%	22%	27%	36%	19%	24%	20%	21%	31%
Lack of awareness of the services available	21%	20%	20%	16%	23%	26%	20%	28%	20%	21%	18%	21%	22%	11%
Limited early morning/evening services available	17%	22%	15%	15%	27%	17%	19%	20%	25%	18%	24%	17%	18%	15%
Health concerns – worried about getting ill from others	17%	20%	21%	13%	20%	22%	17%	33%	28%	15%	18%	21%	16%	9%
Travelling with other people (e.g. children) makes it difficult to travel by public transport	14%	15%	15%	16%	14%	13%	14%	19%	15%	15%	12%	15%	11%	31%

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

4.3.5 Barriers to public transport – train

Barriers to public transport TRAIN	Uttlesford*	Braintree	Maldon*	Chelmsford	Basildon	Brentwood*	Epping Forest*	Harlow	Colchester	Tendring	Rochford*	Castle Point*
Ticket costs	53%	55%	45%	48%	48%	33%	60%	46%	48%	46%	61%	46%
Not direct route/inconvenient	40%	45%	47%	30%	37%	33%	33%	39%	28%	36%	42%	60%
Does not go to destinations I need	40%	41%	29%	24%	22%	19%	47%	35%	34%	30%	32%	44%
Time constraints (e.g. it can take too long to get to a destination)	23%	35%	27%	26%	14%	27%	36%	31%	27%	38%	17%	36%
Infrequent services	33%	28%	36%	27%	23%	20%	37%	23%	21%	18%	9%	26%
Safety concerns – other's behaviour around you	17%	27%	24%	24%	22%	15%	27%	29%	25%	29%	11%	29%
Health concerns – worried about getting ill from others	17%	26%	26%	21%	27%	18%	23%	19%	17%	20%	23%	23%
Lack of awareness of the services available	16%	26%	23%	25%	17%	10%	16%	22%	20%	11%	11%	26%
Physical accessibility of using this type of transport	15%	19%	7%	13%	18%	20%	32%	14%	9%	34%	12%	20%
Limited early morning/evening services available	8%	18%	18%	13%	11%	13%	23%	21%	18%	20%	5%	16%

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

TABLE 8: Top 10 barriers to public transport – Using Train, by district (%)

4.3.6 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+
Ticket costs	51%	49%	46%	38%	54%	65%	50%	47%	41%	55%	55%	50%	46%	34%
Not direct route/inconvenient	36%	40%	27%	37%	46%	38%	37%	33%	38%	38%	30%	41%	42%	40%
Does not go to destinations I need	38%	29%	20%	30%	39%	45%	34%	21%	30%	34%	27%	34%	35%	35%
Time constraints (e.g. it can take too long to get to a destination)	28%	30%	30%	27%	30%	27%	27%	36%	34%	27%	26%	27%	36%	31%
Infrequent services	26%	24%	26%	21%	29%	23%	24%	26%	23%	26%	15%	30%	26%	31%
Safety concerns – other's behaviour around you	23%	26%	27%	21%	26%	24%	23%	34%	30%	23%	22%	28%	24%	20%
Health concerns – worried about getting ill from others	24%	20%	20%	20%	25%	21%	20%	40%	28%	20%	17%	25%	21%	17%
Lack of awareness of the services available	21%	17%	19%	17%	20%	19%	18%	29%	18%	19%	15%	19%	26%	18%
Physical accessibility of using this type of transport	18%	20%	21%	14%	20%	22%	18%	37%	37%	13%	26%	16%	16%	19%
Limited early morning/evening services available	18%	14%	15%	13%	20%	16%	16%	21%	20%	16%	19%	17%	13%	11%

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

4.3.7 Barriers to public transport - Underground

Barriers to public transport UNDERGROUND	Uttlesford*	Braintree	Maldon	Chelmsford	Basildon	Brentwood*	Epping Forest*	Harlow	Colchester	Tendring	Rochford	Castle Point
Ticket costs	40%	41%	26%	37%	41%	28%	38%	32%	36%	31%	45%	43%
Not direct route/inconvenient	60%	39%	28%	29%	33%	37%	27%	46%	30%	31%	41%	37%
Does not go to destinations I need	39%	36%	21%	24%	19%	25%	22%	37%	31%	28%	28%	37%
Time constraints (e.g. it can take too long to get to a destination)	25%	32%	19%	23%	12%	15%	38%	37%	21%	24%	14%	28%
Safety concerns – other's behaviour around you	20%	25%	25%	20%	27%	19%	28%	31%	22%	23%	12%	27%
Infrequent services	19%	20%	35%	20%	16%	17%	32%	27%	13%	18%	10%	22%
Health concerns – worried about getting ill from others	13%	21%	11%	17%	24%	16%	23%	25%	21%	16%	16%	16%
Lack of awareness of the services available	16%	18%	15%	15%	19%	9%	28%	23%	17%	10%	11%	21%
Physical accessibility of using this type of transport	25%	15%	8%	15%	16%	13%	34%	17%	10%	25%	11%	8%
Limited early morning/evening services available	12%	11%	16%	11%	13%	8%	14%	18%	14%	15%	5%	17%

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

TABLE 9: Top 10 barriers to public transport – Using Underground, by district (%)

4.3.8 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+
Ticket costs	34%	39%	40%	36%	39%	30%	36%	44%	36%	38%	42%	37%	34%	33%
Not direct route/inconvenient	37%	34%	28%	28%	46%	40%	35%	27%	33%	37%	31%	34%	38%	44%
Does not go to destinations I need	31%	28%	21%	27%	36%	31%	30%	26%	24%	31%	31%	30%	27%	30%
Time constraints (e.g. it can take too long to get to a destination)	25%	22%	25%	22%	26%	22%	22%	35%	26%	22%	19%	23%	29%	34%
Safety concerns – other's behaviour around you	23%	24%	29%	21%	27%	17%	22%	32%	33%	21%	21%	23%	28%	32%
Infrequent services	22%	18%	18%	15%	26%	19%	19%	27%	20%	20%	16%	20%	24%	18%
Health concerns – worried about getting ill from others	21%	17%	24%	17%	20%	15%	18%	31%	23%	18%	16%	21%	20%	26%
Lack of awareness of the services available	18%	16%	18%	15%	17%	17%	17%	18%	15%	18%	12%	18%	21%	25%
Physical accessibility of using this type of transport	15%	17%	19%	13%	17%	15%	16%	24%	31%	12%	21%	13%	17%	18%
Limited early morning/evening services available	13%	13%	17%	10%	18%	8%	13%	16%	13%	14%	13%	14%	13%	13%

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

4.3.9 Barriers to walking

Barriers to walking	Uttlesford **	Braintree *	Maldon **	Chelmsford *	Basildon **	Brentwood **	Epping Forest**	Harlow **	Colchester *	Tendring **	Rochford **	Castle Point**
Time constraints (e.g. it can take too long to get to a destination)		40%		28%					24%			
Safety concerns – lighting along pavements		32%		18%					26%			
Fitness level		20%		37%					20%			
Weather		35%		15%					22%			
Safety concerns – pavements close to busy roads		31%		23%					23%			
Not a direct route/inconvenient		22%		10%					25%			
Pavements are not always wide enough or have kerbs making them hard to use		15%		18%					19%			
Travelling with other people (e.g. children) makes it difficult to walk		15%		15%					6%			
Lack of awareness of pavement routes		11%		7%					14%			
This transport limits my employment opportunity/access to different jobs		15%		2%					11%			

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

TABLE 10: Top 10 barriers to walking by district (%)

4.3.10 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 (e.g. it can take too long to get to a destination)	26%	23%	22%	28%	29%	16%	23%	35%	17%	31%	16%	30%	26%	
Safety concerns – lighting along pavements	25%	22%	25%	27%	26%	11%	24%	22%	18%	28%	21%	23%	20%	
Fitness level	20%	28%	15%	10%	32%	49%	25%	18%	35%	19%	33%	19%	13%	
Weather	23%	17%	17%	14%	26%	33%	22%	19%	19%	22%	24%	25%	14%	
Safety concerns – pavements close to busy roads	21%	16%	25%	19%	12%	18%	18%	14%	16%	21%	11%	22%	10%	
Not a direct route/inconvenient	18%	15%	16%	20%	21%	6%	16%	16%	13%	19%	18%	21%	10%	
Pavements are not always wide enough or have kerbs making them hard to use	21%	11%	23%	14%	15%	17%	17%	8%	15%	18%	13%	19%	15%	
Travelling with other people (e.g. children) makes it difficult to walk	11%	11%	13%	11%	8%	11%	10%	6%	7%	12%	10%	10%	5%	
Lack of awareness of pavement routes	11%	8%	17%	7%	4%	13%	11%	8%	10%	8%	9%	11%	7%	
This transport limits my employment opportunity/access to different jobs	9%	8%	7%	10%	9%	4%	8%	11%	4%	11%	3%	11%	10%	

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

4.3.11 Barriers to using the car/motorcycle/van

Barriers to using the car/motorcycle/van	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Fuel costs	22%	38%	29%	33%	31%	30%	35%	28%	31%	25%	29%	32%
Parking costs	29%	25%	28%	20%	24%	28%	29%	20%	27%	19%	24%	20%
Congestion on the roads	31%	22%	30%	22%	20%	21%	27%	23%	24%	22%	21%	26%
Insurance costs	17%	27%	28%	19%	19%	22%	30%	25%	22%	19%	21%	22%
Availability of parking	21%	24%	27%	22%	22%	21%	25%	21%	21%	15%	15%	16%
Vehicle maintenance costs	16%	20%	20%	16%	15%	21%	21%	16%	18%	18%	19%	17%
Do not have a driving license	2%	10%	13%	12%	18%	10%	9%	18%	15%	20%	12%	13%
Ownerships/availability of this type of transport	4%	8%	8%	9%	12%	11%	14%	17%	13%	9%	9%	3%
'Time constraints (e.g. it can take too long to get to a destination)	1%	5%	2%	3%	1%	2%	7%	5%	4%	2%	5%	4%
This transport limits my employment opportunity/access to different jobs	0%	0%	3%	0%	1%	3%	2%	3%	2%	1%	1%	3%

TABLE 11 : Top 10 barriers to using the car/motorcycle/van by district (%)

4.3.12 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%	30%	36%	40%	26%	20%	31%	31%	31%	31%	31%	34%	30%	27%
Parking costs	25%	24%	27%	25%	22%	23%	24%	22%	20%	25%	24%	23%	24%	23%
Congestion on the roads	25%	23%	17%	21%	26%	31%	23%	19%	21%	25%	21%	25%	21%	20%
Insurance costs	21%	23%	32%	24%	17%	18%	22%	28%	24%	22%	23%	23%	20%	16%
Availability of parking	22%	20%	19%	20%	22%	23%	20%	20%	20%	21%	17%	23%	16%	28%
Vehicle maintenance costs	17%	19%	25%	22%	15%	9%	17%	25%	20%	17%	20%	18%	16%	21%
Do not have a driving license	9%	16%	26%	13%	8%	8%	13%	23%	21%	11%	27%	11%	7%	3%
Ownerships/availability of this type of transport	10%	10%	19%	11%	7%	5%	10%	13%	14%	9%	14%	10%	9%	12%
Time constraints (e.g. it can take too long to get to a destination)	4%	3%	6%	4%	2%	3%	3%	7%	4%	3%	2%	3%	3%	12%
This transport limits my employment opportunity/access to different jobs	1%	1%	1%	2%	1%	0%	1%	2%	3%	1%	1%	2%	2%	2%

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

4.3.13 Barriers to using or leasing an electric vehicle

Barriers to owning or leasing an electric vehicle	Uttlesford **	Braintree *	Maldon **	Chelmsford *	Basildon **	Brentwood **	Epping Forest**	Harlow **	Colchester *	Tendring **	Rochford **	Castle Point**
Cost of purchasing EV		56%		54%					57%			
Lack of access to charging infrastructure (ability to charge the EV at home or close to home)		57%		46%					38%			
Not planning on replacing current vehicle		46%		29%					48%			
Maintenance cost of EV		48%		22%					41%			
Limited knowledge/awareness		11%		7%					24%			

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

TABLE 12: Barriers to using or leasing an electric vehicle by district (%)

4.3.14 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	LGBTQ+**	Yes	No	Under £25k	£25K-£54,999	£55K-£99,999*	£100K+**
Cost of purchasing EV	63%	51%	49%	49%	63%	58%	57%		59%	56%	53%	65%	56%	
Lack of access to charging infrastructure	48%	39%	18%	42%	53%	38%	42%		53%	42%	39%	42%	53%	
Not planning to replace current vehicle	38%	40%	39%	42%	32%	46%	39%		41%	37%	43%	36%	42%	
Maintenance cost of EV	37%	33%	26%	34%	42%	28%	35%		48%	32%	39%	41%	20%	
Limited knowledge/ awareness	4%	30%	40%	25%	17%	1%	19%		20%	19%	20%	23%	16%	
Other	20%	14%	4%	8%	21%	30%	16%		20%	17%	28%	12%	1%	

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

4.3.15 Barriers to using a connected and autonomous vehicle

Barriers to using a connected and autonomous vehicle	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Personal security concerns	62%	54%	53%	54%	47%	47%	52%	68%	56%	45%	57%	53%
Technology fears of using a vehicle they haven't used before	64%	45%	42%	47%	53%	46%	65%	46%	50%	34%	65%	32%
Lack of information/ awareness	47%	33%	49%	45%	56%	34%	38%	36%	42%	38%	48%	39%
Potential increased costs associated with using this vehicle	31%	31%	32%	29%	27%	17%	27%	21%	39%	31%	28%	28%

TABLE 13: Barriers to using a connected and autonomous vehicle by district (%)

4.3.16 Barriers to car sharing

Barriers to car sharing with people	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Personal security concerns	43%	39%	40%	42%	52%	33%	46%	38%	48%	37%	37%	40%
Reduced flexibility	54%	43%	46%	41%	33%	36%	49%	39%	41%	29%	40%	39%
Privacy/prefer to travel alone	46%	38%	30%	32%	43%	41%	49%	41%	40%	43%	31%	36%
Increased journey times	28%	28%	25%	27%	22%	20%	28%	39%	27%	22%	18%	26%
Cleanliness/hygiene	21%	19%	11%	18%	21%	10%	25%	17%	28%	22%	13%	14%
Lack of information/ awareness	13%	13%	28%	17%	17%	14%	20%	23%	18%	14%	25%	10%

TABLE 14: Barriers to car sharing with people by district (%)

4.3.17 Barriers to car sharing

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+
Personal security concerns	38%	47%	51%	50%	36%	33%	42%	39%	45%	42%	43%	43%	43%	49%
Reduced flexibility	40%	40%	29%	45%	46%	35%	40%	35%	38%	42%	30%	40%	50%	49%
Privacy/prefer to travel alone	42%	38%	33%	36%	45%	44%	40%	45%	36%	42%	30%	43%	43%	42%
Increased journey times	25%	27%	32%	30%	23%	19%	25%	34%	25%	26%	19%	30%	26%	34%
Cleanliness/hygiene	21%	19%	21%	20%	20%	15%	19%	23%	22%	19%	18%	21%	20%	16%
Lack of information/ awareness	16%	18%	23%	19%	14%	12%	17%	20%	15%	18%	15%	19%	17%	19%
Other	6%	5%	2%	4%	7%	8%	6%	1%	7%	5%	8%	5%	3%	4%
None of these	12%	13%	8%	9%	14%	20%	13%	11%	15%	12%	19%	9%	8%	7%

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

4.3.18 Barriers to using a car club/car hiring

Barriers to using a car club/ car hiring	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Prefer to own my vehicle	57%	52%	38%	48%	46%	44%	63%	40%	46%	47%	47%	46%
Inconvenient locations for pick up/drop off	37%	33%	34%	31%	22%	29%	37%	27%	36%	25%	27%	31%
Costs associated with hiring a vehicle	27%	30%	30%	29%	30%	27%	29%	26%	39%	20%	34%	42%
Personal security fears	28%	26%	22%	29%	29%	22%	32%	35%	34%	31%	24%	32%
Lack of information/ awareness	18%	23%	25%	28%	30%	21%	28%	30%	24%	22%	27%	18%
Technology fears of using a vehicle they haven't used before	9%	12%	16%	14%	11%	12%	15%	17%	15%	11%	10%	16%
Cleanliness of the vehicle	8%	10%	6%	10%	14%	7%	16%	7%	14%	13%	8%	13%

TABLE 15: Barriers to using a car club/car hiring by district (%)

4.3.19 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	53%	45%	31%	45%	55%	61%	49%	42%	40%	52%	34%	51%	52%	64%
Inconvenient locations for pick up/drop off	34%	28%	22%	26%	37%	36%	30%	36%	30%	32%	22%	33%	32%	53%
Costs associated with hiring a vehicle	30%	31%	30%	32%	29%	29%	30%	35%	31%	30%	33%	31%	33%	25%
Personal security fears	27%	32%	46%	34%	20%	20%	29%	30%	35%	28%	30%	31%	29%	35%
Lack of information/ awareness	24%	26%	27%	29%	23%	19%	25%	35%	22%	26%	23%	27%	27%	19%
Technology fears of using a vehicle they haven't used before	13%	12%	21%	16%	8%	9%	12%	14%	19%	12%	16%	11%	16%	16%
Cleanliness of the vehicle	13%	10%	13%	9%	12%	13%	11%	16%	13%	11%	8%	13%	12%	8%
Other	7%	7%	1%	3%	11%	12%	7%	10%	12%	5%	12%	6%	5%	1%
None of these	7%	11%	8%	7%	9%	13%	9%	4%	8%	9%	14%	8%	5%	3%

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

4.0 Appendix

4.4 Essex – Understanding the factors that may influence future travel behaviour and choices – Encourage future use

4.4.1 Encourage cycling in the future

Ways to encourage cycling	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Segregated cycle lanes (from road traffic)	17%	15%	27%	24%	7%	19%	22%	19%	20%	17%	20%	20%
Well-lit cycle lanes	24%	15%	19%	21%	9%	18%	17%	26%	19%	14%	19%	22%
Well-maintained cycle lanes	14%	15%	17%	18%	14%	13%	15%	20%	17%	19%	23%	15%
Well connected and continuous cycle routes	16%	13%	17%	17%	13%	16%	9%	19%	14%	14%	29%	19%
Secure cycle storage at other destinations	10%	8%	11%	18%	8%	17%	23%	14%	14%	12%	12%	10%
Cycle routes that go near my intended destination/other transport types	16%	14%	20%	14%	8%	13%	15%	16%	13%	6%	17%	12%
Secure cycle storage at work location	7%	10%	13%	15%	11%	16%	14%	18%	17%	4%	16%	12%
Secure cycle storage near my home	5%	12%	13%	11%	11%	12%	19%	14%	13%	7%	12%	12%
Cycle to work scheme	3%	10%	15%	11%	13%	13%	15%	20%	12%	7%	10%	12%
Showers at work location	10%	11%	8%	12%	11%	15%	14%	17%	9%	4%	8%	6%

TABLE 16: Top 10 encourage cycling in the future by district (%)

4.4.2 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%	16%	11%	19%	24%	15%	18%	20%	12%	21%	14%	21%	18%	27%
Well-lit cycle lanes	17%	18%	15%	25%	18%	8%	17%	18%	16%	18%	15%	19%	20%	18%
Well-maintained cycle lanes	20%	14%	9%	18%	22%	13%	17%	14%	13%	18%	13%	19%	16%	17%
Well connected and continuous cycle routes	18%	14%	11%	17%	18%	15%	15%	23%	15%	16%	12%	17%	17%	19%
Secure cycle storage at other destinations	15%	11%	16%	15%	14%	8%	13%	17%	12%	13%	14%	13%	12%	20%
Cycle routes that go near my intended destination/other transport types	15%	12%	11%	14%	17%	7%	13%	15%	11%	14%	10%	14%	15%	16%
Secure cycle storage at work location	12%	12%	22%	17%	9%	1%	11%	22%	9%	12%	9%	13%	16%	13%
Secure cycle storage near my home	11%	12%	20%	18%	8%	0%	11%	18%	11%	11%	8%	13%	12%	15%
Cycle to work scheme	12%	10%	23%	17%	6%	0%	11%	18%	10%	11%	8%	12%	13%	19%
Showers at work location	11%	10%	17%	13%	9%	1%	10%	11%	8%	10%	6%	12%	13%	11%

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

4.4.3 Encourage use of public transport – bus

Ways to encourage use of public transport -Bus	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Reduced ticket cost	44%	44%	53%	56%	53%	47%	61%	51%	56%	48%	56%	51%
More frequent services	48%	50%	63%	43%	41%	49%	64%	46%	42%	41%	53%	29%
On-time and reliable services	36%	41%	55%	46%	37%	39%	54%	46%	43%	43%	50%	24%
Improved stations/stop facilities	22%	26%	30%	27%	24%	24%	40%	33%	29%	22%	27%	19%
Travel pass scheme (e.g. London Oyster card, 16-25 Railcard)	20%	21%	29%	25%	29%	22%	42%	30%	23%	18%	29%	22%
Combined tickets (e.g. for bus and train)	17%	16%	33%	28%	25%	24%	33%	32%	19%	15%	19%	17%
Less busy services	11%	20%	15%	21%	25%	26%	40%	27%	19%	21%	16%	16%
Improved safety on-board	11%	16%	23%	24%	28%	20%	38%	27%	18%	18%	16%	13%
Improve cleanliness on-board	13%	11%	18%	24%	23%	12%	40%	35%	25%	16%	19%	12%
Tap on/tap off payments	14%	13%	26%	22%	24%	21%	32%	25%	18%	8%	10%	9%

TABLE 17: Top 10 encourage use of public transport –Using Bus– in the future by district (%)

4.4.4 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	50%	54%	53%	60%	52%	39%	52%	54%	47%	54%	51%	57%	54%	44%
More frequent services	46%	48%	44%	46%	46%	51%	46%	44%	49%	46%	46%	48%	46%	42%
On-time and reliable services	43%	44%	37%	42%	43%	51%	43%	37%	42%	43%	43%	44%	38%	47%
Improved stations/stop facilities	26%	28%	30%	31%	24%	23%	27%	29%	28%	26%	27%	27%	26%	30%
Travel pass scheme (e.g. London Oyster card, 16-25 Railcard)	27%	25%	35%	25%	21%	26%	26%	23%	23%	26%	27%	26%	22%	28%
Combined tickets (e.g. for bus and train)	23%	23%	19%	23%	26%	21%	23%	23%	21%	23%	24%	24%	20%	21%
Less busy services	21%	24%	28%	26%	19%	15%	22%	28%	26%	20%	23%	21%	24%	20%
Improved safety on-board	21%	22%	25%	23%	18%	21%	21%	26%	23%	20%	24%	22%	19%	25%
Improve cleanliness on-board	20%	23%	27%	25%	17%	17%	21%	25%	23%	21%	24%	20%	20%	25%
Tap on/tap off payments	18%	19%	15%	19%	22%	17%	18%	21%	17%	19%	17%	21%	18%	16%

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

4.4.5 Encourage use of public transport – train

Ways to encourage use of public transport -Train	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Reduced ticket cost	61%	53%	70%	64%	68%	60%	71%	59%	65%	60%	71%	51%
On-time and reliable services	32%	31%	45%	36%	31%	27%	48%	41%	36%	25%	42%	24%
More frequent services	31%	28%	37%	30%	27%	38%	52%	39%	30%	37%	37%	26%
Improved stations/stop facilities	27%	25%	25%	23%	23%	25%	37%	34%	29%	20%	29%	18%
Travel pass scheme (e.g. London Oyster card, 16-25 Railcard)	18%	22%	34%	26%	34%	26%	35%	30%	22%	15%	27%	26%
Less busy services	14%	20%	21%	24%	20%	26%	40%	27%	24%	23%	16%	14%
Improved safety on-board	10%	17%	20%	22%	28%	21%	44%	25%	18%	24%	17%	15%
Combined tickets (e.g. for bus and train)	14%	17%	30%	24%	27%	22%	33%	33%	21%	13%	17%	17%
Improve cleanliness on-board	13%	15%	16%	21%	21%	16%	36%	30%	17%	18%	16%	21%
Tap on/tap off payments	14%	13%	20%	23%	28%	18%	34%	26%	17%	10%	11%	7%

TABLE 18: Top 10 encourage use of public transport – Using Train- in the future by district (%)

4.4.6 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	62%	64%	55%	67%	65%	61%	63%	66%	52%	67%	56%	67%	63%	70%
On-time and reliable services	35%	35%	31%	37%	35%	33%	34%	34%	35%	34%	32%	36%	35%	37%
More frequent services	30%	37%	40%	36%	30%	30%	34%	33%	35%	33%	33%	33%	36%	41%
Improved stations/stop facilities	26%	26%	34%	29%	22%	19%	26%	29%	26%	26%	26%	24%	26%	39%
Travel pass scheme (e.g. London Oyster card, 16-25 Railcard)	25%	27%	33%	26%	22%	23%	26%	26%	23%	26%	27%	27%	23%	27%
Less busy services	22%	24%	27%	27%	20%	17%	23%	22%	26%	22%	23%	22%	24%	23%
Improved safety on-board	22%	23%	28%	25%	18%	21%	22%	30%	25%	21%	26%	23%	19%	28%
Combined tickets (e.g. for bus and train)	23%	22%	21%	22%	24%	20%	22%	24%	20%	22%	26%	23%	19%	19%
Improve cleanliness on-board	19%	22%	26%	22%	19%	14%	20%	27%	20%	20%	21%	20%	20%	24%
Tap on/tap off payments	18%	20%	16%	18%	20%	21%	19%	20%	17%	19%	18%	19%	19%	18%

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

4.4.7 Encourage use of public transport – Underground

Ways to encourage use of public transport -Underground	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Reduced ticket cost	39%	40%	53%	55%	55%	55%	67%	58%	50%	42%	50%	42%
On-time and reliable services	21%	27%	34%	29%	27%	23%	46%	33%	29%	27%	29%	20%
More frequent services	21%	25%	29%	23%	26%	32%	49%	38%	26%	27%	30%	26%
Travel pass scheme (e.g. London Oyster card, 16-25 Railcard)	17%	20%	35%	25%	28%	24%	41%	30%	21%	13%	25%	23%
Improved stations/stop facilities	16%	25%	23%	20%	22%	23%	38%	32%	26%	16%	24%	21%
Less busy services	16%	21%	20%	21%	23%	31%	44%	30%	21%	22%	18%	14%
Improved safety on-board	11%	16%	25%	21%	26%	22%	39%	24%	18%	17%	21%	16%
Combined tickets (e.g. for bus and train)	11%	16%	27%	25%	24%	23%	32%	26%	18%	13%	15%	15%
Improve cleanliness on-board	13%	16%	15%	23%	21%	20%	36%	23%	19%	15%	14%	16%
Tap on/tap off payments	12%	13%	21%	20%	25%	16%	29%	24%	15%	7%	13%	6%

TABLE 19: Top 10 encourage use of public transport –Using Underground- in the future by district (%)

4.4.8 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	50%	51%	46%	56%	50%	48%	51%	49%	43%	53%	44%	55%	52%	51%
On-time and reliable services	28%	30%	31%	31%	27%	28%	29%	31%	27%	29%	27%	31%	27%	29%
More frequent services	26%	31%	33%	30%	25%	30%	29%	21%	30%	28%	31%	29%	30%	27%
Travel pass scheme (e.g. London Oyster card, 16-25 Railcard)	25%	24%	31%	24%	20%	26%	25%	19%	23%	24%	26%	25%	22%	23%
Improved stations/stop facilities	24%	24%	29%	29%	21%	16%	23%	26%	27%	23%	24%	23%	23%	30%
Less busy services	22%	25%	29%	26%	21%	18%	24%	24%	24%	23%	22%	23%	24%	29%
Improved safety on-board	22%	21%	27%	22%	18%	20%	21%	30%	21%	20%	24%	22%	17%	26%
Combined tickets (e.g. for bus and train)	22%	20%	19%	21%	22%	19%	20%	24%	19%	20%	22%	22%	19%	16%
Improve cleanliness on-board	18%	21%	26%	23%	17%	13%	19%	23%	20%	19%	20%	19%	19%	25%
Tap on/tap off payments	16%	18%	14%	15%	19%	20%	17%	23%	14%	17%	14%	18%	17%	15%

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

4.4.9 Encourage walking in the future

Ways to encourage walking	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Well lit walking routes	34%	29%	27%	39%	39%	26%	46%	39%	31%	21%	37%	27%
Well maintained walking routes	27%	28%	29%	36%	39%	27%	35%	41%	35%	30%	30%	20%
Wider footways	26%	28%	25%	27%	24%	28%	35%	27%	28%	31%	27%	24%
Continuous pavements (e.g. without kerbs blocking routes, or routes ending)	19%	31%	34%	31%	19%	15%	32%	22%	24%	16%	25%	19%
More zebra or signalised crossings	18%	18%	26%	20%	30%	19%	31%	22%	27%	11%	22%	17%
Quieter routes near lower traffic roads	18%	19%	12%	20%	18%	7%	24%	16%	24%	11%	28%	15%
Walking routes that go near my intended destination/other transport types (e.g. public transport)	22%	11%	14%	17%	13%	10%	23%	20%	10%	9%	12%	6%
Flexible work hours allowing more time to travel by this type	1%	4%	7%	7%	12%	7%	10%	11%	6%	5%	9%	9%

TABLE 20: Ways to encourage walking in the future by district (%)

4.4.10 Encourage walking in the future

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%	39%	34%	38%	35%	22%	33%	38%	32%	33%	30%	35%	34%	31%
Well maintained walking routes	35%	30%	21%	27%	38%	44%	33%	27%	25%	34%	32%	36%	28%	26%
Wider footways	27%	28%	36%	32%	23%	21%	27%	36%	29%	27%	29%	26%	31%	25%
Continuous pavements (e.g. without kerbs blocking routes, or routes ending)	22%	26%	27%	29%	21%	19%	24%	30%	23%	24%	21%	23%	26%	24%
More zebra or signalised crossings	21%	23%	39%	30%	11%	11%	21%	25%	21%	22%	25%	22%	21%	21%
Quieter routes near lower traffic roads	16%	20%	20%	18%	21%	13%	18%	22%	17%	18%	16%	18%	19%	25%
Walking routes that go near my intended destination/other transport types (e.g. public transport)	12%	15%	13%	16%	13%	13%	14%	12%	12%	14%	13%	13%	14%	13%
Flexible work hours allowing more time to travel by this type	6%	9%	9%	14%	4%	0%	8%	4%	7%	8%	5%	7%	11%	14%
Other	3%	2%	1%	1%	4%	4%	3%	1%	2%	3%	4%	3%	2%	1%
None of these	31%	23%	9%	19%	34%	44%	27%	21%	31%	26%	31%	24%	23%	25%

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

4.4.11 Concerns about climate change

Environmental and social issue concerns	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Deforestation/loss of habitat	86%	82%	75%	89%	85%	86%	91%	83%	85%	82%	83%	77%
The use of single-use plastic	85%	82%	79%	85%	86%	84%	85%	79%	81%	76%	87%	81%
Biodiversity/species extinction	89%	74%	67%	81%	76%	83%	85%	78%	81%	73%	84%	60%
Climate change/ global warming	86%	76%	72%	82%	81%	82%	91%	83%	83%	73%	89%	71%
Racial injustice	73%	68%	66%	75%	83%	73%	80%	74%	70%	64%	70%	59%
Social inequality	72%	70%	75%	76%	79%	67%	79%	72%	71%	63%	67%	65%

TABLE 21: NET very/fairly concern towards climate change by district (%)

4.4.12 Responses to statements about climate change

Agreement with statements about climate change	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Central Government should be doing far more to help the environment	74%	72%	77%	79%	71%	73%	76%	66%	72%	64%	74%	70%
Large companies should be doing far more to help the environment	67%	70%	72%	80%	72%	65%	74%	78%	68%	65%	74%	77%
Local councils should be doing far more to help the environment	61%	65%	67%	69%	72%	74%	78%	61%	68%	70%	71%	72%
Sustainable travel is really important to me (e.g. using public transport, staying in eco-friendly accommodations)	29%	38%	42%	42%	51%	35%	47%	45%	39%	34%	41%	46%
I don't want to think about sustainability or the environment during my leisure time	30%	32%	28%	25%	38%	33%	35%	34%	35%	38%	26%	22%
There's too much concern with the environment and global warming	23%	33%	36%	23%	22%	26%	30%	38%	24%	31%	17%	26%

TABLE 22: NET: Strongly agree/agree with statements about climate change by district (%)

4.4.13 Personal behaviours to support the environment (1)

Personal behaviours carried out to help the environment	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Recycling items rather than throwing them away	78%	66%	76%	68%	70%	68%	65%	61%	63%	67%	72%	66%
Switching off the heating/electricity when you go out	69%	58%	55%	65%	64%	53%	67%	63%	57%	54%	61%	57%
Cutting down on plastic use	46%	52%	56%	60%	57%	49%	55%	48%	50%	59%	60%	48%
Re-using items like empty bottles, jars, envelopes or paper	51%	48%	59%	55%	51%	51%	54%	52%	49%	60%	59%	49%
Reduce water usage	45%	48%	43%	47%	49%	44%	61%	52%	44%	53%	50%	36%
Avoiding buying products with too much packaging	42%	34%	31%	40%	47%	32%	35%	38%	32%	42%	47%	35%
Making my garden more bee/nature friendly	36%	39%	39%	41%	39%	23%	27%	41%	34%	49%	43%	42%
Buying locally produced food/produce	43%	36%	41%	34%	31%	23%	36%	23%	32%	46%	41%	29%
Taking sustainable transport options, such as public transport, cycling, and walking	32%	24%	24%	42%	38%	33%	46%	35%	31%	26%	33%	22%
Limiting your meat consumption	31%	26%	27%	31%	25%	30%	41%	29%	25%	23%	25%	26%

TABLE 23a: Personal behaviours carried out to help the environment by district (%)

4.4.14 Personal behaviours to support the environment (2)

Personal behaviours carried out to help the environment	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Switching to renewable energy suppliers	23%	25%	24%	24%	25%	20%	11%	26%	21%	20%	25%	24%
Flying less or flying shorter distances	16%	17%	18%	21%	19%	16%	16%	17%	20%	12%	14%	17%
Installing new energy technologies (e.g. solar panels, heat pumps)	8%	19%	22%	14%	13%	10%	9%	10%	11%	8%	14%	9%
Contacting local politicians	6%	4%	13%	7%	5%	5%	8%	5%	5%	6%	7%	3%
Posting about global warming on social media	6%	4%	2%	4%	9%	5%	7%	9%	5%	6%	5%	7%

TABLE 23b: Personal behaviours carried out to help the environment by district (%)

4.4.15 Perception of scenarios if introduced in local area

How welcoming are the following scenarios?	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Creating quieter, healthier neighbourhoods allowing more space for people and reducing high levels of traffic	55%	57%	64%	62%	57%	55%	56%	62%	59%	46%	65%	53%
Improving quality/width of footways by reducing space for cars (parking or road lanes)	39%	47%	47%	56%	53%	42%	50%	46%	46%	38%	51%	47%
Introducing clean air zones, and monetary charges for vehicles producing higher emissions in these areas	48%	36%	36%	47%	46%	50%	39%	41%	46%	31%	42%	42%
Introducing segregated cycle lanes by reducing on-street parking	48%	40%	53%	51%	41%	41%	32%	40%	42%	37%	44%	39%
Restricting the level of vehicle travel in heavily congested areas through access restrictions	36%	33%	45%	45%	40%	36%	35%	40%	39%	32%	48%	42%
Limiting vehicle access to town centres/shopping areas	32%	25%	30%	36%	32%	37%	26%	27%	36%	30%	37%	33%
Workplace car park charging to reduce level of employees travelling to work by car	10%	25%	33%	27%	26%	29%	26%	29%	27%	23%	29%	21%
Introduce a charge to drive through/to certain areas, for example a toll charge	19%	18%	30%	24%	25%	20%	22%	24%	29%	17%	22%	18%
Increased car park charging at destinations such as shopping centres	11%	18%	20%	25%	19%	24%	17%	26%	22%	17%	19%	20%

TABLE 24: NET: very welcoming/welcoming are scenarios if introduced in local area by district (%)

4.4.16 Ideas to encourage more sustainable transport choices

Ideas to encourage more sustainable transport choices	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Increasing the number of public transport routes and services	73%	75%	83%	71%	77%	78%	77%	74%	68%	69%	75%	65%
Subsidising public transport tickets/fares to reduce the cost when travelling	74%	64%	77%	63%	67%	77%	69%	61%	60%	59%	63%	61%
Providing tax breaks for people who use public transport, cycle, or walk	55%	54%	66%	63%	70%	65%	60%	56%	62%	60%	59%	60%
Investing in infrastructure that makes it easier to walk and cycle, such as footpaths, cycle paths, and cycle	61%	61%	60%	68%	61%	60%	65%	60%	56%	53%	59%	45%
Introducing emission charges for vehicles (i.e. higher emitting vehicles pay more)	38%	39%	41%	41%	36%	44%	42%	43%	43%	40%	38%	43%
Introducing a congestion charge based on busyness of roads for vehicles	21%	27%	37%	33%	28%	33%	44%	28%	38%	30%	29%	37%
Making it more expensive to park vehicles in city centres	29%	24%	32%	30%	29%	31%	31%	28%	31%	17%	30%	26%
Making it more expensive to park vehicles at work	23%	19%	21%	19%	20%	20%	22%	16%	24%	21%	13%	23%

TABLE 25: NET: strongly agree/agree on ideas to encourage more sustainable transport choices by district (%)

4.4.17 Scenarios for road charge implementation

Scenarios that road charging should be based on	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Emissions from their vehicle	30%	42%	42%	44%	43%	39%	38%	49%	40%	28%	47%	44%
Type of vehicle used	22%	23%	39%	32%	47%	31%	45%	31%	37%	26%	36%	30%
Time of day when travelling	40%	32%	29%	31%	31%	26%	26%	26%	33%	26%	26%	30%
The use of certain roads (e.g. most congested roads or town centres)	30%	26%	34%	35%	30%	17%	20%	15%	31%	20%	33%	29%
Annual mileage of the vehicle	12%	14%	18%	15%	10%	16%	12%	8%	15%	11%	10%	14%
Other	1%	5%	5%	3%	2%	5%	4%	2%	6%	5%	5%	1%
Don't know/not sure	14%	24%	25%	26%	19%	17%	30%	15%	18%	32%	19%	19%

TABLE 26: Scenarios of which road charging be based upon by district (%)

4.4.18 Priorities for allocating additional funds

Top priorities for funding	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Improving condition of road (e.g. filling potholes)	58%	54%	61%	59%	56%	60%	48%	58%	55%	73%	58%	61%
Increasing number of available public transport services (e.g. bus, train)	65%	52%	55%	52%	36%	54%	56%	51%	46%	39%	53%	39%
Improving footway quality	32%	50%	42%	42%	44%	42%	37%	41%	50%	51%	45%	55%
Subsidised ticket cost for local bus services	31%	45%	45%	41%	47%	37%	48%	41%	41%	32%	43%	36%
Widely-available EV charging points	22%	17%	23%	17%	21%	21%	17%	20%	20%	14%	14%	16%
Improving the number and quality of cycleways (e.g. increase the number of segregated cycleways)	14%	13%	19%	18%	23%	13%	14%	16%	22%	18%	24%	19%
Increasing the accessibility to transport services for all users	17%	17%	21%	18%	16%	17%	18%	25%	18%	22%	16%	14%
Specific named transport improvement projects, for example a new railway station	19%	22%	21%	20%	13%	20%	22%	24%	15%	8%	14%	14%
Not directly for transport, but towards increasing general funding for local councils	17%	12%	6%	13%	7%	13%	20%	15%	12%	13%	8%	15%

TABLE 27: Priority of statements relating to raising additional funds for the transport area by district (%)

4.4.19 Fairest ways of addressing funding gap

Top fairest ways of addressing funding gap	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Implement a road user charge based on vehicle emission level	35%	37%	39%	31%	28%	34%	34%	35%	37%	35%	30%	31%
Implement a road user charge based on size and weight of vehicle	31%	38%	33%	34%	29%	28%	39%	30%	35%	31%	30%	36%
Increase taxes on other types of vehicles, such as electric vehicles and hybrid vehicles	23%	39%	48%	34%	28%	21%	29%	34%	32%	22%	36%	32%
Allocate a portion of existing tax revenue to be used for transport infrastructure	43%	32%	26%	33%	20%	36%	32%	33%	24%	29%	38%	20%
Seek additional funding from private companies	26%	20%	12%	17%	23%	14%	18%	22%	21%	19%	17%	17%
Apply a local tax to those visiting the country or area	5%	18%	24%	17%	20%	29%	16%	24%	27%	18%	12%	17%
Implement a road user charge to access certain areas	19%	14%	15%	18%	21%	11%	19%	14%	21%	15%	20%	24%
Implement a road user charge at certain times of day/week	19%	14%	16%	21%	19%	20%	15%	23%	17%	10%	16%	21%
Increase income taxes or fees	14%	11%	8%	8%	16%	9%	21%	11%	9%	9%	6%	11%
Additional council tax	8%	11%	7%	12%	8%	13%	13%	9%	18%	8%	12%	10%
Reduction in Government spending on transport	13%	6%	3%	6%	5%	5%	3%	7%	7%	10%	7%	11%

TABLE 28: Statements rated on fairest way of addressing the funding gap by district (%)

4.4.20 Messaging for behaviour change

Chosen form of messaging	Uttlesford	Braintree	Maldon	Chelmsford	Basildon	Brentwood	Epping Forest	Harlow	Colchester	Tendring	Rochford	Castle Point
Personal health benefits such as losing weight	50%	56%	44%	53%	58%	42%	50%	48%	50%	50%	47%	62%
Environmental benefits such as improving the local air quality	28%	20%	31%	26%	21%	25%	28%	27%	23%	26%	27%	21%
Personal finances benefits/cost savings such as reducing cost associated with travel	22%	24%	25%	20%	21%	33%	21%	25%	27%	23%	26%	17%

TABLE 29: Preference for best focus of messaging for changing behaviour by district (%)

TRANSPORT EAST

Essex County Council