

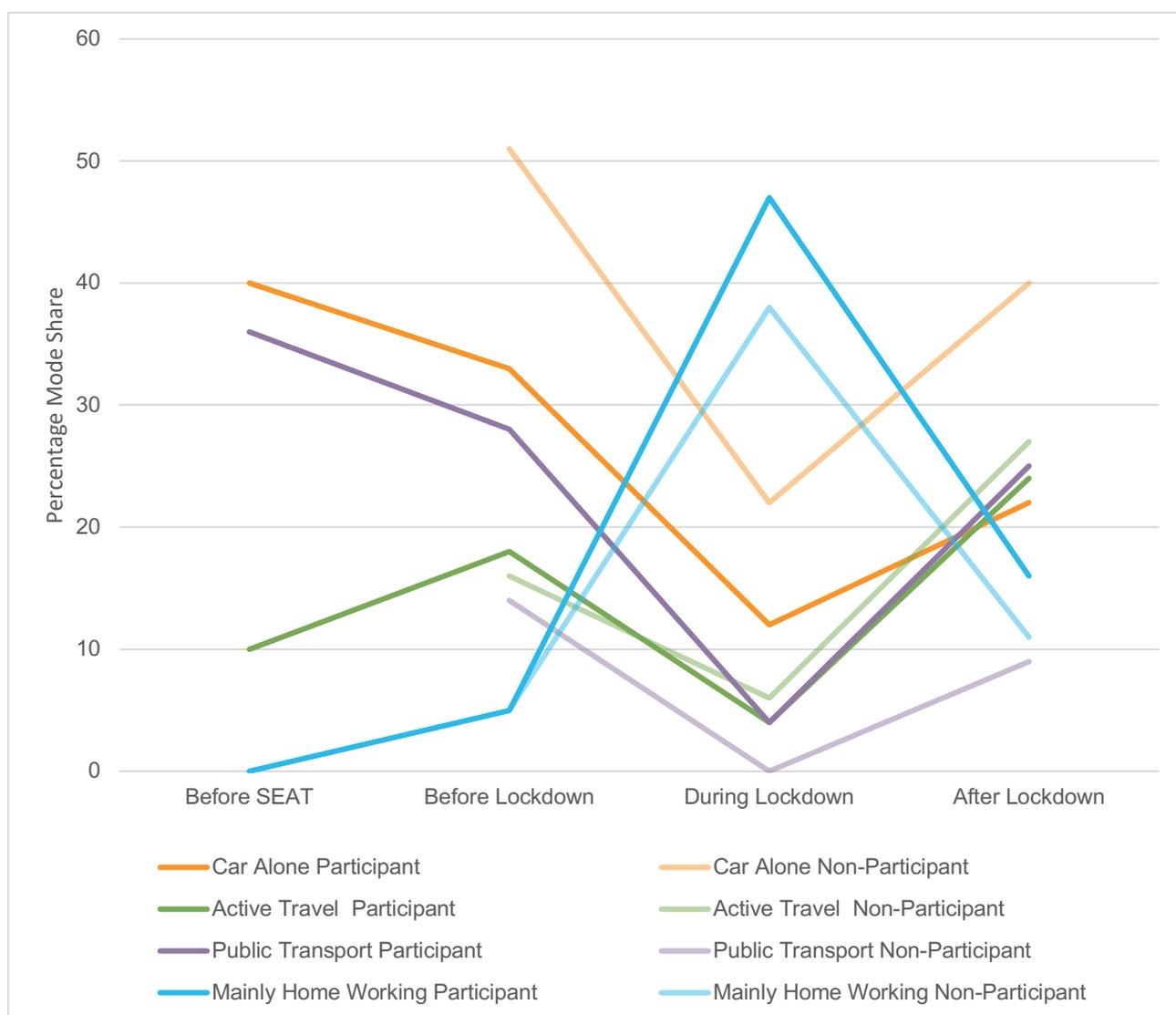
South Essex Active Travel Lockdown Travel Survey Analysis July 2020

KEY FINDINGS¹

1. Mode of travel before, during and after lockdown

Figure 1 illustrates the change in use of different mode types for travel to education, training or work for both participants and non-participants over four key time periods; including before, during and after lockdown.

Figure 1: Proportion of travel by mode type over time (participants & non-participants)



¹ Based on survey of 163 respondents; including 94 past participants of the SEAT programme, and 55 non-participants.



Car Alone

Participants' use of single occupancy car (dark orange line) fell after engaging with SEAT, and was at a lower level than non-participants (light orange) before lockdown began.

Across all modes, before lockdown participants were more likely to be travelling by sustainable modes (55%) than non-participants (37%).

The pre-SEAT sample size was small, but these results indicate that SEAT is having a positive impact on participants' mode choice.

For both participants and non-participants car alone mode share fell dramatically during lockdown. For both groups car alone use is predicted to bounce back up again after lockdown, but for neither group is this expected to reach pre-lockdown levels.

Across all respondents the proportion likely to drive alone after lockdown is -12 percentage points lower than before lockdown.

As car alone mode share will be lower after lockdown there is opportunity for SEAT to support both participants and non-participants in accessing sustainable alternatives.

Active Travel

Participants' use of active travel (dark green line) increased after engaging with SEAT.

Use of active modes by participants fell slightly more dramatically than among non-participants (light green line) during lockdown. This reflects that more participants began home working and ceased travelling – while a greater proportion of non-participants continued to travel to work during lockdown.

For both participants and non-participants there is likely to be a post-lockdown increase in active travel compared to before lockdown. This increase is likely to be more significant for non-participants. (For example, their cycle use may be +9 percentage points on pre-lockdown levels, more than double the +4 percentage point increase indicated by participants.) This increase is likely to apply to both recreation and utility trips – as across all respondents 44% said they would generally be walking and cycling more afterwards.

This suggests that there is the opportunity to support participants, and in particular non-participants, as they increase their use of active travel post-lockdown.

Public Transport

Participants' use of public transport (dark purple line) decreased after engaging with SEAT.

Part of an apparent trend for SEAT participants to move away from car alone and bus trips towards higher levels of cycling, car sharing and working from home (although this analysis is based on a small sample size).

During lockdown participants' use of public transport declined sharply but participants expect to be using public transport after lockdown almost as much as they were pre-lockdown

Non-participants' use of public transport (pale purple line) was significantly lower than participants' use before lockdown. Their use of public transport dropped to zero during lockdown, and is not expected to recover as well after lockdown.

This suggests that while participants are committed users of public transport and relatively confident about using it post-lockdown, there is a significant need / opportunity for SEAT to encourage and support non-participants' in their use of public transport after lockdown.



Home Working

Overall, the proportion of respondents working or studying mainly from home jumped from 6% before lockdown to 43% during lockdown; with people working from home on average 4-5 days per week.

Participants were more likely to have adopted home working (dark blue line) during lockdown than non-participants (light blue line).

While levels of home working are likely to fall after lockdown ends, greater numbers of both participants (triple the pre-lockdown proportion) and non-participants (double) are likely to be home working than before lockdown. On average they are likely to do this 3-4 days per week.

This greater propensity to work from home in the future provides opportunities for SEAT to target suitable initiatives and communications at home workers (e.g. led walks and rides for health and companionship during lunch breaks, or encouraging and facilitating walking and cycling to access local shops and services); as well as for the partner local authorities to more widely support households with reorienting to greater home working (e.g. providing the digital infrastructure, or facilitating use of shops and services in local centres rather than the urban centres workers previously utilised during the working day.)

2. Active travel during lockdown

During lockdown the majority of respondents (88%) were walking or cycling either every day or some days. Participants were slightly more likely (+5 percentage points) to be walking or cycling.

The majority of respondents (72%) were walking or cycling for exercise, with nearly a quarter (23%) also doing so for personal business trips.

This suggests that while participants were less likely to be using active travel to access work during lockdown, they were more likely to doing it for recreation.

44% of respondents (almost half) were walking / cycling more than before lockdown.

Participants were slightly more likely (+3 percentage points compared to non-participants) to say they were using active travel *more* than before lockdown.

Participants were also more likely (+6 percentage points compared to non-participants) to say they were using active modes *less* than before. However, this is likely to be influenced by participants generally working from home more than non-participants (so travelling less) and also that they started from a higher level of pre-lockdown active travel.

3. Help from SEAT & attitudes to future sustainable travel

A third of participants (34%) said that the support they'd received from SEAT had helped them to walk or cycle during lockdown.

About three quarters of these cited the confidence to walk and cycle they'd developed via SEAT (74%), while about half credited equipment received (56%) and half credited skills training (48%).

Nearly half of respondents (44%) are likely to walk and cycle *more often* after lockdown; with past participants being more likely to state this (+11 percentage points compared to non-participants).

This indicates that participating in SEAT has helped people to walk and cycle during lockdown, and increases the likelihood of people continuing to walk or cycle more often after lockdown.

Only about half of respondents (55%) plan on using public transport *as much* as they did before lockdown. A significant proportion (42%) say they will use public transport *less often* after lockdown than they did before.



APPENDIX: DETAILED ANALYSIS

This analysis was completed in July 2020 based on combined responses from 163 respondents to two surveys over May – June 2020.

149 respondents stated they had either definitely received (participants) or definitely not received (non-participants) a SEAT service in the past. Additional sub-analysis of these two groups was conducted for key questions to see if there is any difference in their responses.²

A1. Mode of travel before, during and after lockdown

Table 1: Before lockdown, what was your usual mode of travel to work, training or education? (i.e. the way you travelled for the majority of days of the week, for the longest part of your journey) (Q1)

Response	% of all respondents (n=163)	% participants (n=94)	% non-participants (n=55)
Car - alone	40%	33%	51%
Car - with other people	7%	9%	7%
Taxi	1%	1%	0%
Train	14%	17%	9%
Bus	9%	11%	5%
Cycle	12%	14%	7%
Walk	6%	4%	9%
I wasn't in training, education or employment	6%	6%	5%
I worked / studied mainly from home	5%	5%	5%

Table 1 shows that before lockdown a higher proportion of non-participants than participants were using cars and walking to access work, training or education (58% cf 42% and 9% cf 4% respectively).

A higher proportion of participants were using public transport (28%) and cycling (14%) compared to non-participants (14% and 7% respectively).

Table 2: During lockdown, what was your usual mode of travel to work, training or education? (i.e. the way you travelled for the majority of days of the week, for the longest part of your journey) (Q6)

Response	% of all respondents (n=150)	% participants (n=94)	% non-participants (n=55)
Car - alone	15%	12%	22%
Car - with other people	1%	1%	2%
Taxi	1%	1%	0%
Train	1%	2%	0%
Bus	2%	2%	0%
Cycle	10%	7%	15%
Walk	3%	4%	4%

² The balance of 14 respondents were not sure whether they had received a service or not.



Motorcycle	1%	0%	2%
I am not in education, training or employment	11%	11%	9%
I am temporarily not studying / training / working (e.g. furloughed or course on hold)	11%	13%	9%
I am working / studying mainly from home	43%	47%	38%

Table 2 shows that during lockdown the majority of participants (47%) and non-participants (38%) were working or studying from home. The proportion driving to work, training or education had dropped off considerably, particularly for participants (13%) but also for non-participants (24%).

Table 3: After lockdown, what is likely to be your usual mode of travel to work, training or education? (i.e. the way you travel for the majority of days of the week, for the longest part of your journey) (Q9)

Response	% of all respondents (n=144)	% participants (n=82)	% non-participants (n=55)
Car - alone	28%	22%	40%
Car - with other people	4%	5%	4%
Taxi	0%	0%	0%
Train	13%	16%	5%
Bus	7%	9%	4%
Cycle	17%	18%	16%
Walk	8%	6%	11%
Motorcycle	1%	0%	2%
I will not be in education, training or employment	9%	9%	7%
I will work / study mainly from home	14%	16%	11%

Table 3 shows that the proportion of respondents driving to education, training or work after lockdown is likely to increase compared to during lockdown, but to a much lower level than before lockdown. For participants the difference in the proportion of those driving before/after lockdown is -15 percentage points, while for non-participants the difference is -14 percentage points.

The proportion who intend to cycle to education, training or work after lockdown has increased for all respondents, more than doubling for non-participants compared to before lockdown (+9 percentage points) and increasing by +4 percentage points for participants.

The proportion likely to work or study mainly from home has doubled for non-participants and more than trebled for participants (compared to before lockdown).



A2. Working or studying from home before, during and after lockdown

Table 4: How many days a week did / do / will you work or study from home during a typical week? (before / during / after lockdown) (Q2 / Q7 / Q10)

Response	BEFORE % of all respondents (n=160)	DURING % of all respondents (n=149)	AFTER % of all respondents (n=141)
0	46%	18%	33%
1	8%	2%	4%
2	10%	1%	7%
3	6%	11%	4%
4	3%	6%	5%
5	15%	36%	11%
6	1%	3%	1%
7	2%	2%	2%
Not in training, education or employment	9%	11%	10%
Temporarily not studying, training or working (e.g. furloughed or course on hold)	N/A	11%	N/A
I am unsure what my employer / training provider / educational establishment will allow for but I would like to work / study from home LESS often	N/A	N/A	2%
I am unsure what my employer / training provider / educational establishment will allow for but I would like to work / study from home MORE often	N/A	N/A	22%

Table 4 shows that before lockdown the majority of respondents (46%) worked zero days from home. 45% worked from home for between 1 and 7 days a week, with the median being 1 day per week.

During lockdown only 18% worked from home zero days a week. 61% worked from home for between 1 and 7 days a week, with over a third (36%) working from home 5 days a week. The median number of days worked from home was 4-5 days.

After lockdown a third (33%) expect to work zero days from home. 34% expect to work from home between 1 and 7 days a week, with the median being 3-4 days. There is considerable uncertainty for nearly a quarter of respondents about future ability to work or study from home, however a fifth (22%) would like to work / study from home more often. This could lead to more than half (56%) of respondents working from home, with the median number of days they would work or study at home in a week increasing from 1 day to 3-4 days.



A3. Walking and cycling during and after lockdown

Table 5: During lockdown how often are you walking / cycling? (Q3)

Response	% of all respondents (n=155)	% participants (n=90)	% non-participants (n=55)
Every day	43%	42%	42%
Some days	45%	47%	42%
Not at all	12%	11%	16%

Table 5 shows that during lockdown the majority of respondents (88%) were walking or cycling either every day or some days. Past participants were slightly more likely (+5 percentage points) to be walking / cycling.

Table 6: During lockdown are you walking / cycling...? (Q4)

Response	% of all respondents (n=156)	% participants (n=88)	% non-participants (n=55)
More often than before lockdown	44%	45%	42%
About the same as before lockdown	24%	20%	29%
Less often than before lockdown	24%	26%	20%
I am not walking or cycling	8%	8%	9%

Tables 6 shows that the majority (44%) of respondents were walking or cycling more. Table 7 shows that the majority (72%) of respondents were walking or cycling for exercise with nearly a quarter (23%) for personal business.

Table 7: If walking / cycling during lockdown what sort of journeys are you doing? (Q5)

Response	% of all respondents (n=154)
Exercise	72%
Travel to work (essential worker)	11%
Travel to work (non-essential worker)	8%
Caring for family/friends	10%
Personal business	23%
Volunteering	4%
I am not walking or cycling	11%



Table 8: Has the support you received from SEAT helped you to walk and cycle during lockdown? (tick all that apply) (Q8)

Response	% of participants (n=84)
Yes, I have the equipment I need to walk / cycle	18%
Yes, I have the skills I need to walk / cycle	15%
Yes, I have the confidence to walk / cycle	24%
No	45%
Other	18%

34% of past participants said the support they received had helped them to walk and cycle during lockdown (n=27). Of these, three quarters (74%) said they had been given the confidence to use active travel by SEAT, while about half appreciated the equipment (56%) and skills (48%) they had received.

Table 9: After lockdown are you likely to walk and cycle...? (Q11)

Response	% of all respondents (n=140)	% participants (n=80)	% non-participants (n=55)
More often than before lockdown	44%	49%	38%
About the same as before lockdown	54%	48%	60%
Less often than before lockdown	3%	4%	2%

Table 9 shows that a high proportion of respondents (44%) and an even higher proportion of participants (49%) are likely to walk and cycle more often after lockdown. The vast majority of participants and non-participants intend to maintain or increase their levels of walking and cycling after lockdown.

Responses to the question ‘What, if anything, would help you walk and cycle more after lockdown ends?’ (Q12)

The majority of responses to this question focused on cycle infrastructure – in particular the need for segregated cycleways – and reducing the impact of vehicular traffic and driver behaviour.

See separate spreadsheet for all replies.

A4. Public transport after lockdown

Table 10: After lockdown are you likely to use public transport...? (Q13)

Response	% of all respondents (n=139)	% participants (n=79)	% non-participants (n=55)
More often than before lockdown	3%	5%	0%
About the same as before lockdown	55%	53%	58%
Less often than before lockdown	42%	42%	42%

Table 10 shows the impact of Covid-19 on use of public transport, with over two-fifths (42%) of respondents intending to use public transport less often after lockdown.



Responses to the question ‘What, if anything, would help you to use public transport more after lockdown ends?’ (Q14)

The majority of responses to this question focused on public transport being safe from a public health perspective (e.g. room for social distancing, cleanliness).

A significant number of comments focused on the cost of public transport. The remainder focused on the need for improvements to routes, timetables and reliability.

See separate spreadsheet for all replies.

A5. SEAT service users

Table 11 shows the breakdown of SEAT services utilised by respondents who were past participants.

Table 11: Travel service received by participants (Q16)

Response	% of participants (n=28)
Got travel advice at school	0%
Got travel advice at college or university	4%
Got travel advice at work / induction for a new job	21%
Got advice as a job-seeker (via Job Centre Plus)	0%
Got advice as a job-seeker (via a work club or elsewhere)	0%
Got travel advice at a local event	18%
Received a personalised travel plan (via My PTP)	29%
Had cycle training	18%
Had cycle maintenance training	7%
Had a bike health check	11%
Bought a recycled bike	14%
Hired a bike	4%
Borrowed a long-term loan bike	11%
Took part in a travel challenge (e.g. Love to Ride)	4%
Took part in a walking course (e.g. Simply Stride)	14%
Received a bike or support from Circleround	0%
Used the Hardie Park 'Old Spokes Home'	0%
Did learn to ride training (with Just Ride Southend)	0%
Took part in the 'Walking, Talking & Making Along the Thames Estuary' walking festival (with Kinetika People)	0%
Borrowed a bike at Rainham Marshes (from RSPB)	0%
Received support on travel to work or college from Thurrock CVS	0%
Used an electric bike (with Trust Links)	0%
Took part in the Garden Ride (with Trust Links)	0%
Other	4%



Table 12: Before you received this service, what was your usual mode of travel to work, training or education? (i.e. the way you travelled for the majority of days of the week, for the longest part of your journey) (Q17)

Response	% participants (n=30)
Car - alone	40%
Car - with other people	3%
Taxi	0%
Train	23%
Bus	13%
Cycle	0%
Walk	10%
Motorcycle	0%
I wasn't in education, training or employment	10%
I worked / studied mainly from home	0%

The number of participants indicating how they travelled before engaging with SEAT was low (n=30). Table 12 shows the resulting mode split but these figures must be treated with caution.

However, several of the mode shift trends this data shows when compared with participants' pre-lockdown mode split mirror those evidenced from the programmes' findings from its Participant Outcomes Survey (e.g. -7pp fall in driving alone; significant increase in cycling and small decline in walking), so we have chosen to use this data in our presentation of Key Findings to illustrate the earlier change in participants' mode share.

BGH
The Smarter Choice Consultancy Ltd.
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