The Consumer Council

Consumer Views on Decarbonisation and Transport

4 April 2023

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MARKET RESEARCH SERVICES ISO 20252 MQA

UKAS PRODUCT CERTIFICATION 036

Contents

Executive Summary

The Consumer Council commissioned Social Market Research (SMR) to undertake a survey among Northern Ireland (NI) consumers to assess issues relating to transport and decarbonisation. The survey is based on sample of 1007 NI adults using an online panel methodology. The survey was conducted in accordance with the ISO20252 Standard and fieldwork was carried out in March 2023.

Key Findings

Forms of transport ownership

- 81% use or have access to a car
- 4% use or have access to an electric car
- 9% use or have access to a hybrid car

Interest in try-e a try-before-you-buy scheme for electric bikes

- 69% are interested in a try-before-you-buy scheme for electric bikes (20% are not and 11% are undecided)
- 42% of those disinterested cited lack of confidence in using an electric bike (too old, 36%: affordability, 25%)

Use of eHubs and providing consumers with information on alternative forms of transport

- 71% said they would use an eHub (51% for recreation, 38% for shopping and 27% for driving to work)
- 69% prefer to go online if they wanted to find out more about alternative forms of transport in their local area

Ultra Low Emission Zone (ULEZ) in Belfast City Centre

- 60% are supportive of an ULEZ in Belfast City Centre (28% are unsupportive are 12% are undecided)
- 83% are supportive because of a need to reduce carbon emissions
- 60% are unsupportive because of a lack of alternative transport options to the private car

Reducing car use

- 22% said that a grant towards an electric car would be their greatest incentive to using a petrol or diesel car less
- 17% said a convenient, reliable and affordable public transport system would be their greatest incentive
- 73% feel they need more information before deciding to change the way they travel
- 73% of those who want more information, want information on buying and running an electric vehicle
- 75% prefer to be provided with online information on reducing their car use

Conclusions

This survey shows that NI consumers continue to have a high reliance on petrol and diesel cars, with relatively few using or having access to electric or hybrid vehicles. Most consumers would welcome a try-before-you-buy scheme for electric bikes, with most also saying they would use an eHub if provided. Although just over half of consumers are supportive of a ULEZ for Belfast City Centre, a significant number of consumers are resistant, mainly due to a lack of alternative transport options to the private car. Finally, the main motivators for encouraging consumers to use their car less are grants towards electric vehicles and provision of a convenient, reliable and affordable public transport system.

1. Introduction

In March 2023, The Consumer Council commissioned Social Market Research (SMR) to undertake a survey among NI consumers issues relating to transport and decarbonisation.

1.1 Survey Focus and Content

The aim of the survey was to explore:

- Consumer interest in try before you buy scheme for electric bikes
- Use of e-Hubs
- Ultra Low Emission Zones (ULEZs)
- Incentives to encourage consumers to stop using petrol or diesel cars
- Information provision to help change travel behaviour

1.2 Survey Methodology

The survey is based on 1007 interviews with the N Ireland general public aged 18+. The survey was conducted using an online panel methodology with results representative of the NI adult population. The survey has a margin of error of +/-3.1% (at most). Fieldwork was conducted between 20 and 31 March 2023. The research was conducted in line with ISO20252 of which Social Market Research is fully accredited. The survey questionnaire is included as Appendix 1.

1.2.1 Sample Profile

Table 1.1 presents an overview of the sample profile weighted by age, sex, social class and area (LGD) and in line with census mid-year population estimates for 2021.

Table 1.1 Sample Profile [n=1007]			
		%	n
Sex	Male	48	483
	Female	52	524
Age	18-34	29	295
	35-59	42	422
	60+	29	290
SEG[1]	ABC1	48	480
	C2DE	52	527
Local government district	Antrim and Newtownabbey Borough Council	8	83
	Ards and North Down	9	91
	Armagh City, Banbridge and Craigavon	10	101
	Belfast	18	185
	Causeway Coast and Glens	8	80
	Derry and Strabane	8	78
	Fermanagh and Omagh	6	61
	Lisburn and Castlereagh	8	79
	Mid and East Antrim	7	69
	Mid Ulster	8	84
	Newry, Mourne and Down	10	97

[1] Used as an indicator of social class with ABC1 grades including: higher managerial, administrative or professional; intermediate managerial, administrative or professional; and, supervisory or clerical, junior managerial, administrative or professional. C2DE social grades include: skilled manual workers; semi and unskilled manual workers; and, state pensioners or widows (no other earner), casual or lowest grade workers.

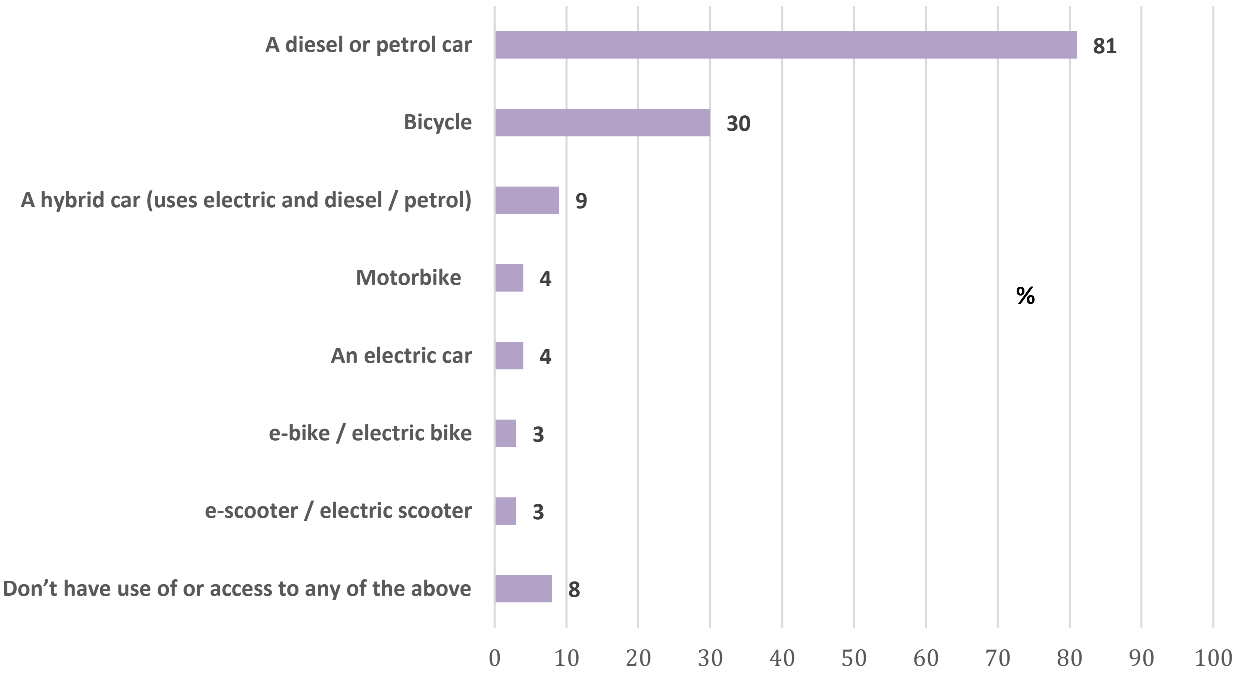
2. Survey Findings

2.1 Use of or access to different forms of transport

Figure 1 shows that 81% of consumers said they either use or have access to a diesel or petrol car, with 30% saying they either use or have a access to a bicycle and 9% either using or having access to a hybrid car.

Relatively few consumers said they use or have access to an e-scooter (3%), an e-bike (3%), an electric car (4%) or motorbike (4%).

Figure 1: Can we start by asking if you have use of or access to any of the following? (base=1007)



Statistically Significant Differences between Respondent Groups

Those more likely to say they have the use of access to a car included:

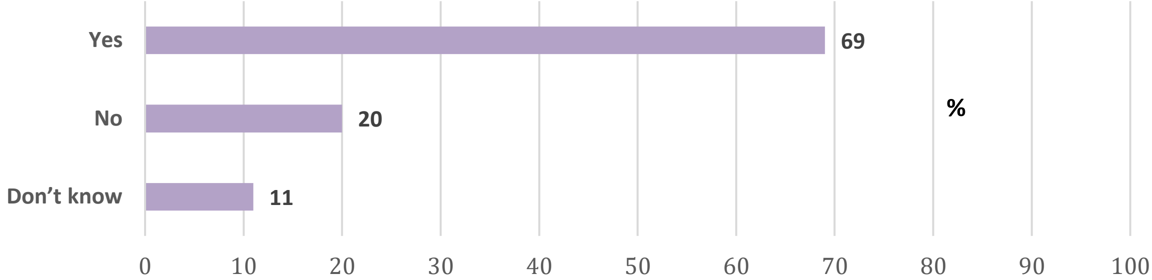
- ABC1 consumers (85% vs. C2DE, 78%)
- Those living in rural areas (88% vs. 77%)
- Higher income groups (<=£20K, 72%: 20K-£40K, 84%: £40K+, 87%)

2.2 Interest in taking part in a try-before-you-buy scheme for electric bikes

All consumers were asked if they would they be interested in taking part in a try-before-you-buy scheme for electric bikes which provided them with an opportunity to trial an electric bike before purchasing one.

Figure 2 shows that almost seven out of ten (69%) consumers said they would be interested in taking part in a try-before-you-buy scheme for electric bikes which provided them with an opportunity to trial an electric bike before purchasing one, 20% are not interested and 11% are undecided.

Figure 2: If there was a try-before-you buy scheme for electric bikes which provided you with an opportunity to trial an electric bike before purchase would you be interested in taking part? (base=1007)



Statistically Significant Differences between Respondent Groups

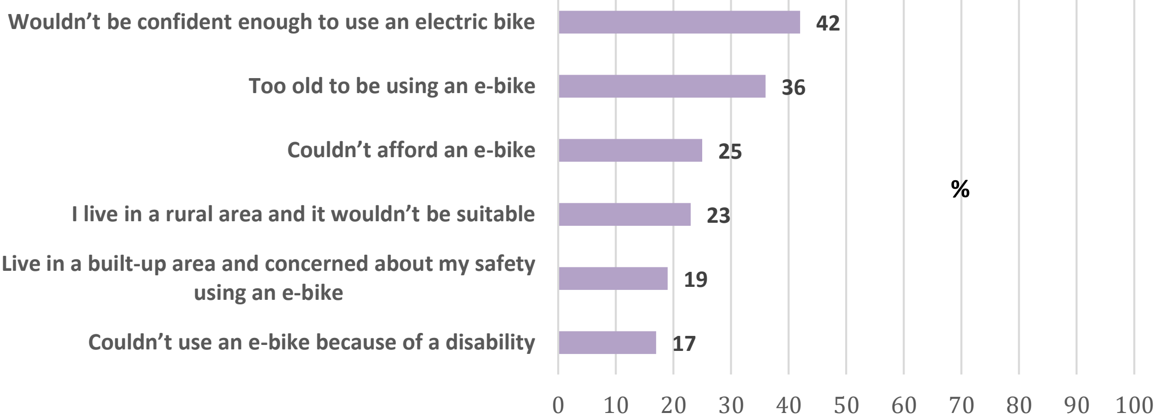
Those more likely to say they would they be interested in taking part in a try-before-you-buy scheme for electric bikes included:

- Men (74% vs. 64%)
- Younger consumers (18-34, 83%: 35-59, 68%: 60+, 57%)
- ABC1 consumers (75% vs. 64%)
- Non-disabled consumers (72% vs. 64%)
- Higher income groups (<=£20K, 61%: 20K-£40K, 73%: £40K+, 80%)

2.2.1 Reasons consumers not interested in taking part in a try-before-you-buy scheme for electric bikes

The most common reasons whey consumers said they would not be interested in taking part in a 'try-before-you-buy' scheme for electric bikes included: not being confident enough to use and electric bike (42%); being too old to use an electric bike (36%); and not being able to afford an e-bike (25%).

Figure 3: Please say if you are *not* interested in a try-before-you-buy scheme for electric bikes because of any of the following..? (base=194)



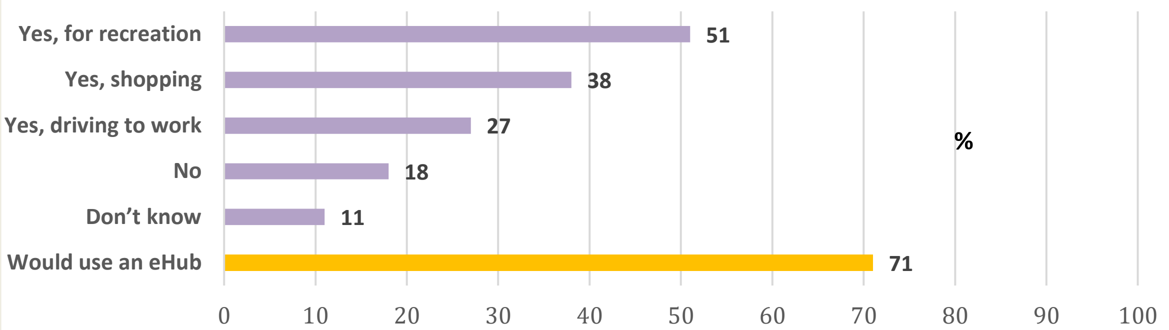
Consumers listed other reasons why they would not be interested in in a 'try-before-you-buy' scheme for electric bikes and these included: rather walk and get exercise (n=1); fearful of an accident (n=1); poor eyesight (n=1); bad knees (n=1); can't ride a bike (n=1); not interested (n=4); already have one (n=1); like my car (n=1); would be embarrassed (n=1); needs tax and insurance (n=1); and, prefer to use ordinary bicycle instead (n=1).

2.3 Use of eHubs

An eHub is an alternative to the private car, for short trips such as shopping, recreation and driving to work (e.g. shared electric vehicles or EVs, car clubs and e-cargo (delivery) bikes etc.). Given this information, consumers were asked if an eHub was available in their area, would they use it for different purposes.

Overall, 71% of consumers said they would use an eHub, with 51% using one for recreation, 38% for shopping and 27% for driving to work. Eighteen percent said they would not use an eHub, and 11% were undecided.

Figure 4: If an eHub was available in your area, would you use it for any of the following..? (base=1007)



Statistically Significant Differences between Respondent Groups

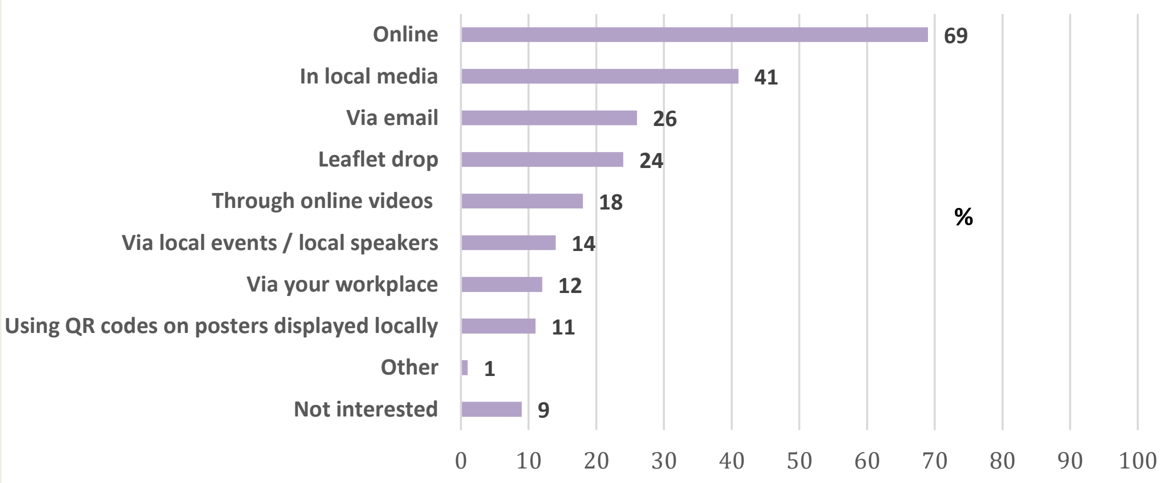
Those more likely to say they would use an eHub included:

- Younger consumers (18-34, 83%: 35-59, 72%: 60+, 59%)
- ABC1 consumers (75% vs. 69%)
- Higher income groups (<=£20K, 66%: 20K-£40K, 75%: £40K+, 78%)

2.3.1 Consumer preferences for getting information on an eHub in their local area

Consumers said that if they wanted to find out more about an eHub in their local area, they would most commonly prefer to get this information online (69%) and via local media (41%). Relatively few consumers preferred other sources: via email (26%); leaflet drop (24%); online videos (18%); local events / speakers (14%); via their workplace (n=12%); and, using QR codes on posters displayed locally (11%). One percent cited other sources[2].

Figure 5: If you wanted to find out more about an eHub in your local area, how would you want to get this information? (base=1007)



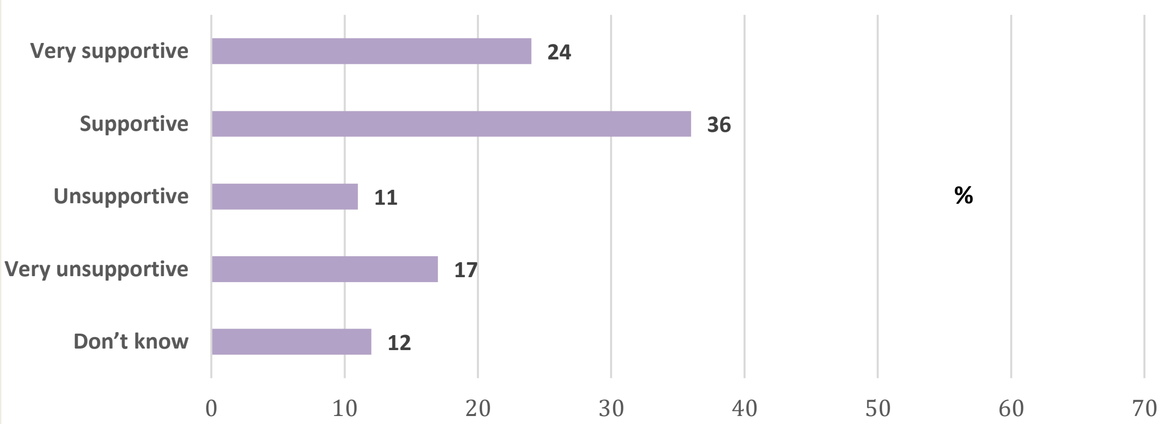
[2] Included: community social media (n=1); contact local authority (n=1); google (n=1); live in a rural area with no public transport links (n=1); word of mouth (n=1).

2.4 Ultra Low Emission Zones (ULEZs)

An **Ultra Low Emission Zone** (ULEZ) is a geographically bounded area within a locality where a fee is charged for driving the most polluting vehicles. Access to roads may be restricted to stop motor vehicles.

Given this information, consumers were asked how supportive they are of an ULEZ in Belfast City Centre, with 60% supportive (very supportive, 24%: supportive, 36%) and 28% unsupportive (unsupportive, 11%: very unsupportive, 17%). Twelve percent were undecided.

Figure 6: How supportive are you of an ULEZ in Belfast City Centre? (base=1007)



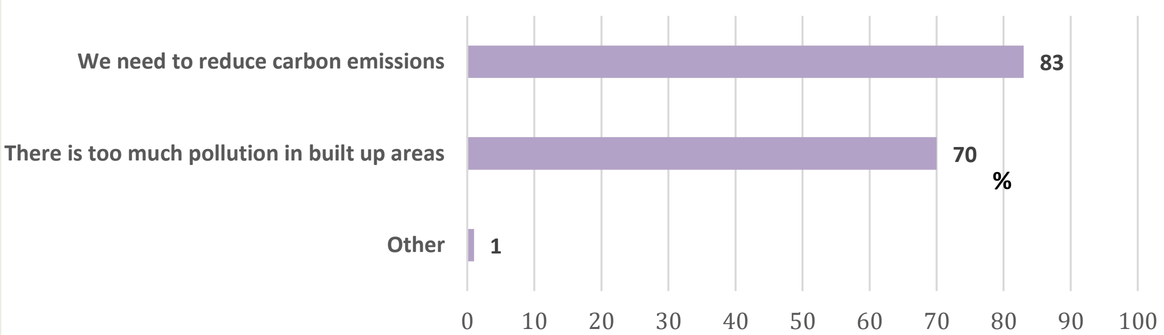
Statistically Significant Differences between Respondent Groups

- Men were more likely to be unsupportive of an ULEZ in Belfast City Centre (35% vs. 22%)
- Younger consumers were more likely to supportive (18-34, 67%: 35-59, 58%: 60+, 56%)
- Higher income groups were more likely to be supportive (<=£20K, 58%: 20K-£40K, 61%: £40K+, 66%)

2.4.1 Reasons why consumers are supportive of an ULEZ in Belfast City Centre

The most common reasons why consumers said they are supportive of an ULEZ in Belfast City Centre included: a need to reduce carbon emissions (83%); and, too much pollution in built up areas (70%).

Figure 7: Why are you supportive of an ULEZ in Belfast City Centre? (base=603)

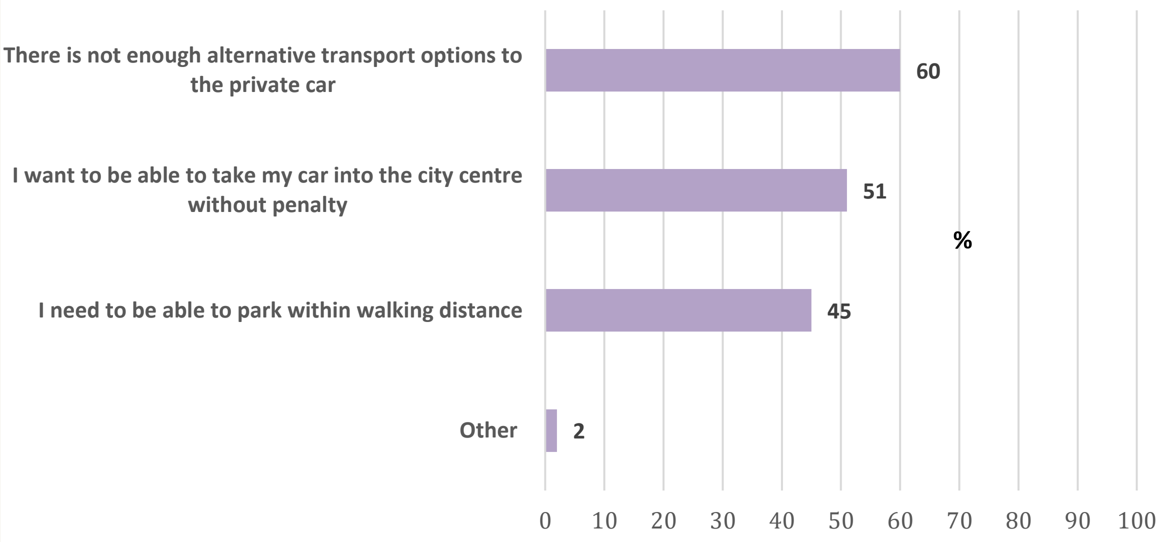


Consumers listed other reasons why they are supportive of an ULEZ in Belfast City Centre and these included: cut down traffic (n=1); encourages development of public transport refocuses people to other means of getting around (n=1); encourages improvement of public transport networks (n=1); global warming (n=1); I want Northern Ireland to do more to stop global warming (n=1); I've seen how a traffic free city centre works so well in Amsterdam (n=1); makes the city look cleaner (n=1); reduce traffic (n=1); there is only really bus access anyway and these can be dangerous as has been proven with past accidents (n=1); to improve the environment (n=1); and there is too much heavy traffic (n=1);

2.4.2 Reasons why consumers are unsupportive of an ULEZ in Belfast City Centre

The most common reasons why consumers said they are unsupportive of an ULEZ in Belfast City Centre included: there is not enough alternative transport options to the private car (60%); a need to be able to park within walking distance of where consumers are going (51%); and, wanting to be able to take a car into the city centre without penalty (45%).

Figure 8: Why are you unsupportive of an ULEZ in Belfast City Centre? (base=283)



Consumers listed other reasons why they are unsupportive of an ULEZ in Belfast City Centre and these included: a lot of people cannot afford to buy electric cars or bikes at the minute so they need to drive what they have now (n=1); cost of living is high already (n=1); damages communities and access to city (n=1); don't live in Belfast (n=1); enough interference already (n=1); I am against un agenda 2030 (n=1); I own a business and require my vehicle every day to access the city centre location for collections and deliveries (n=1); it penalises the poorest. I would never travel into Belfast city centre again if this was introduced (n=1); it's a load of nonsense with government trying to force 5 minute cities (n=1); it's costly enough to live (n=1); low income families can't afford extra charges (n=1); the charge does nothing to help the environment, just goes into coffers of local government (n=1); the traffic in Belfast is already bad enough without any more zones (n=1); this is just another way to fleece money from the already over taxed motorist (n=1); and, ULEZ in London is a joke (n=1).

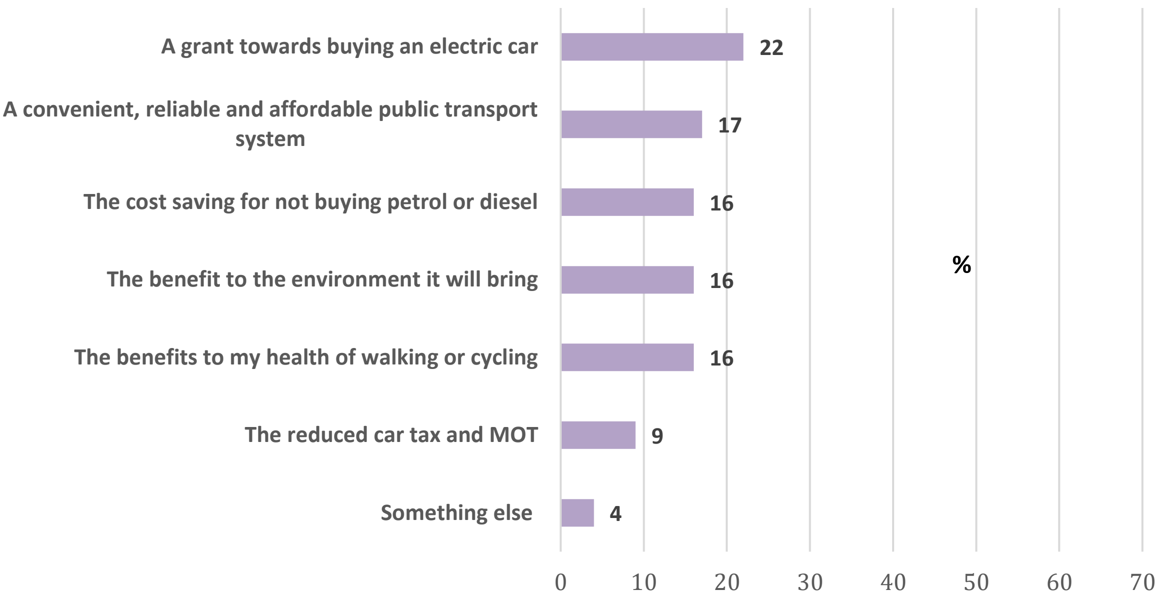
2.5 Greatest incentive to stop using petrol or diesel cars

Consumers were presented with a number of incentives for them to stop using their petrol/diesel car, and then asked which is the greatest incentive.

Figure 9 shows a mixed response to this question, with 22% suggesting a grant towards buying an electric vehicle would be the greatest incentive and 17% suggesting that a convenient, reliable and affordable public transport system would be the greatest incentive.

Other incentives cited by relatively fewer consumers included: the cost saving for not buying petrol or diesel (16%); the benefit to the environment it will bring (16%); the health benefits from walking and cycling (16%); and reduced car tax and MOT (9%). Four percent cited other incentives[3].

Figure 9: Which of the following provides the greatest incentive for you to stop using your petrol/diesel car? (base=1007)



Statistically Significant Differences between Respondent Groups

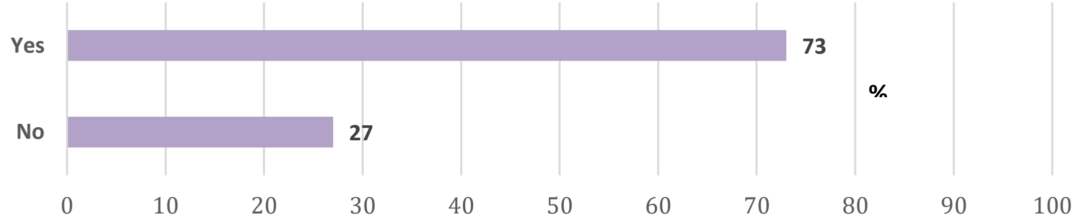
- Younger consumers were more likely to be incentivised by the cost saving for not buying a petrol or diesel (18-34, 19%: 35-59, 16%: 60+, 11%) whereas older consumers were more likely to be incentivised by a convenient, reliable and affordable public transport system (18-34, 10%: 35-59, 15%: 60+, 29%)
- Consumers with a disability were more likely to be incentivised by a convenient, reliable and affordable public transport system (23% v. 15%)
- Higher income groups were more likely to be incentivised by a grant towards buying an electric car (<=£20K, 17%: 20K-£40K, 20%: £40K+, 26%)

[3] Included: don't drive / use a car (n=9); get paid to do it (n=1); health reasons (n=2); no incentive (n=8); disabled and need my car (n=1); and work from home (n=1).

2.6 Information required by consumers before deciding to change the way they travel

Consumers were asked if they feel they need more information before deciding to change the way they travel, with 73% saying they do, and 27% saying they do not.

Figure 10: Do you feel you need more information before deciding to change the way you travel? (base=1007)



Statistically Significant Differences between Respondent Groups

- ABC1 consumers were more likely to say they need more information before deciding to change the way they travel (77% vs. C2DE, 67%)

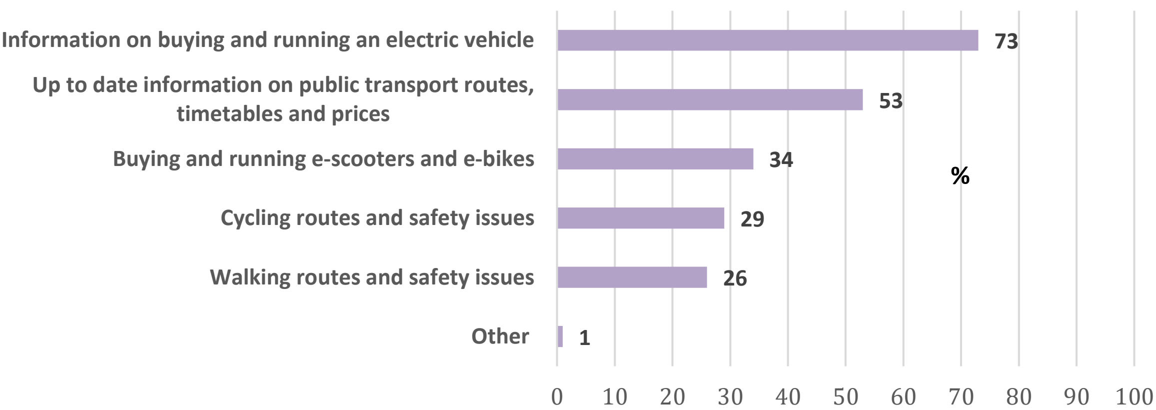
- Higher income groups were more likely were more likely to say they need more information before deciding to change the way they travel (<=£20K, 63%: 20K-£40K, 75%: £40K+, 82%)

2.6.1 Information needed to reduce car use

Those who said they need more information before deciding to change the way they travel were asked what information they would need to reduce their car use. Figure 11 shows that consumers most commonly suggested being provided with information on buying and running an electric vehicle (73%), and up to date information on public transport routes, timetables and prices (53%).

Relatively few consumers suggested they would need information relating to buying and running e-scooters and e-bikes (34%), cycling routes and safety issues (29%) and walking routes and safety issues (26%).

Figure 11: Regarding reducing the amount you use your car, what information would you need? (base=731)



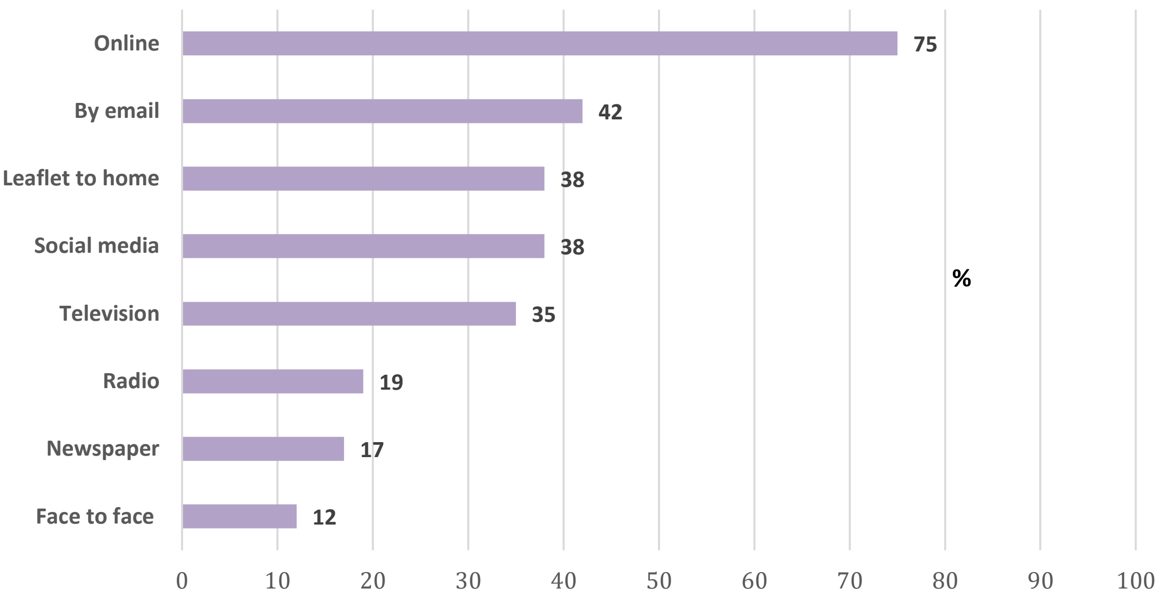
Consumers suggested other information / made other comments including: a good reason (n=1); adequate public transport to get to my place of work (n=1); availability of public transportation in rural areas (n=1); better access to rural transport links (n=1); better public transport (n=1); better public transport in rural areas (n=1); cash to buy it (n=1); disabled friendly options (n=1); electric cars need to come down greatly in price - far too expensive (n=1); how much I will be paid to get out of my car (n=1); I live in a rural area and I'm disabled so not using a car is hard but I have found myself having to use the bus and the times were limited plus I couldn't get up onto a chair (n=1); need to have access from my house due to my mobility disability (n=1); not interested (n=1); public transport into Belfast from where I live is quite poor (n=1); and, information on where on street charging points would be located (n=1).

2.6.2 Consumer preference for receiving information on reducing their car use

Consumers were asked how or where they would like to get information on reducing their car use.

Figure 12 shows that 75% said they would like to get this information online, 42% via email, 38% via a leaflet, 38% via social media and 35% via television. Radio was cited by 19% of consumers, newspapers by 17% and face to face by 12%.

Figure 12: How or where would you like this information? (base=1007)



Appendix (Questionnaire)

The Consumer Council

Questionnaire v3

TRANSPORT DECARBONISATION: CONSUMER SURVEY (2)

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Decarbonisation and Transport

A1. Can we start by asking if you have use of or access to any of the following? **Select all that apply**

A diesel or petrol car	1
A hybrid car (uses electric and diesel / petrol)	2
An electric car	3
e-scooter / electric scooter	4
e-bike / electric bike	5
Bicycle	6
Motorbike	7
Don't have use of or access to any of the above	8

A2. If there was a try-before-you buy scheme for **electric bikes** which provided you with an opportunity to trial an electric bike before purchase would you be interested in taking part? **(Select one only)**

Yes	1
No	2
Don't know	3

ASK IF (A2 EQ 2)

A3. Please say if you are ***not*** interested because of any of the following..? **Select all that apply**

Wouldn't be confident enough to use an electric bike	1
Live in a built-up area and concerned about my safety using an e-bike	2
I live in a rural area and it wouldn't be suitable	3
Couldn't afford an e-bike	4
Couldn't use an e-bike because of a disability	5
Too old to be using an e-bike	6
Other (please specify)	7

eHUBS are on-street locations that bring together e-bikes, e-cargo bikes, e-scooters and/or e-cars, offering users a wide range of options to experiment and use in various situations, such as short trips for shopping, recreation and getting to work. An eHub offers an alternative to the private car.

A4. If an eHub was available in your area, would you use it for any of the following..? **(Select all that apply)**

Yes, shopping	1
Yes, getting to work	2
Yes, for recreation	3
No	4
Don't know	5

A5. If you wanted to find out more about alternative forms of transport to your car in your local area , how would you want to get the information on it? **(Select all that apply)**

In local media	1
Leaflet drop	2
Online	3
Using QR codes on posters displayed locally	4
Through online videos	5
Via your workplace	6
Via local events / local speakers	7
Via email	8
Other (please specify)	9
Not interested	10

A6. An **Ultra Low Emission Zone** (ULEZ) is a geographically bounded area within a locality where a fee is charged for driving the most polluting vehicles.. How supportive are you of an ULEZ in Belfast City Centre? **(Select one only)**

Very supportive	1
Supportive	2
Unsupportive	3
Very unsupportive	4
Don't know	5

ASK IF (A6 EQ 1 or 2)

A7. Why are you supportive of an ULEZ in Belfast City **Centre? (Select one only)**

We need to reduce carbon emissions	1
There is too much pollution in built up areas	2
Other (please specify)	3

ASK IF (A6 EQ 3 or 4)

A8. Why are you unsupportive of an ULEZ in Belfast City Centre? **(Select one only)**

There is not enough alternative transport options to the private car	1
I need to be able to park within walking distance of where I am going	2
I want to be able to take my car into the city centre without penalty	3
Other (please specify)	4

A9. Which of the following provides **the greatest incentive** for you to stop using your petrol/diesel car? **(Select one only)**

The benefits to my health of walking or cycling	1
The benefit to the environment it will bring	2
The reduced car tax and MOT	3
The cost saving for not buying petrol or diesel	4
A grant towards buying an electric car	5
A convenient, reliable and affordable public transport system	6
Something else (please specify)	7

A10. Do you feel you need more information before deciding to change the way you travel? **(Select one only)**

Yes	1
No	2

ASK IF (A10 EQ 1)

A11. Regarding reducing the amount you use your own car, what information do you need? **(Select all that apply)**

Information on buying and running an electric vehicle	1
Up to date information on public transport routes, timetables and prices	2
Buying and running e-scooters and e-bikes	3
Cycling routes and safety issues	4
Walking routes and safety issues	5
Other (please specify)	6
I don't have / use a car	8

ASK IF (A10 EQ 1)

A12. How or where would you like to get this information? **(Select all that apply)**

Television	1
Newspaper	2
Radio	3
Online	4
By email	5
Social media	6
Leaflet to home	7
Face to face	8
Other (please specify)	9

Section X: About You

Finally, some questions about you.

X1. Are you...? **(Single Code)**

Male	Female	Prefer not to say
1	2	3

X2. What age are you?

X3. What is your occupation?

X3a. Which of the following defines your employment position? **(Single Code)**

Higher managerial, administrative or professional	1
Intermediate managerial, administrative or professional	2
Supervisory or clerical and junior managerial, administrative or professional	3
Skilled manual worker	4
Semi-skilled and unskilled manual worker	5
State pensioner, casual worker, or unemployed with state benefits only	6

X4. What is your current employment status? **(Single Code)**

Self-employed	1
Working full-time	2
Working part-time	3
Seeking work for the first time	4
Unemployed, i.e. not working but actively seeking work	5
Not actively seeking work but would like to work	6
Not working and not seeking work	7
Looking after home and family	8
Unable to work due to permanent illness or disability	9
Student (full time)	10
Student (part time)	11
On a government or other training scheme / apprenticeship	12
Retired	13
Other (please specify)	14

X5. What is your highest educational qualification? **(Single Code)**

Degree Level or higher	1
BTEC (Higher), BEC (Higher), TEC (Higher), HNC, HND	2
GCE A 'Level (including NVQ Level 3)	3
BTEC (National), BEC (National), TEC (National), ONC, OND	4
GCSE (including NVQ Level 2), GCE O' Level (including CSE Grade 1), Senior Certificate, BTEC (General), BEC (General)	5
CSE (Other than Grade 1)	6
Other (Please specify)	7
No formal qualification	8
Refused	9

X6. Are your day-to-day activities limited because of a health problem or disability which has lasted or is expected to last, at least 12 months? Include problems which are due to ageing. **(Single Code)**

Yes, limited a lot	1
Yes, limited a little	2
No	3
Prefer not to say	9

X7. Which local council area do you live in? **(Single Code)**

Antrim and Newtownabbey Borough Council	1
Ards and North Down	2
Armagh City, Banbridge and Craigavon	3
Belfast	4
Causeway Coast and Glens	5
Derry and Strabane	6
Fermanagh and Omagh	7
Lisburn and Castlereagh	8
Mid and East Antrim	9
Mid Ulster	10
Newry, Mourne and Down	11

X8. Finally, what type of area do you live in? (Select one only)

City	1
A town	2
A village	3
Rural or countryside	4

X9. Do you or your household have access to an electric or hybrid vehicle?

Yes	1
No, but planning to buy one	2
No	3

X10. Could you please indicate the number that best describes your total **personal income** per year (whether from employment, pensions, state benefits, investments, or any other sources) before the deduction of tax. **(Single code)**

Less than £10,000	1
£10,001 – £20,000	2
£20,001 – £30,000	3
£30,001 – £40,000	4
£40,001 – £50,000	5
£50,001 - £60,000	6
£60,001 - £70,000	7
£70,001 - £80,000	8
£80,001- £90,000	9
£90,001 - £99,999	10
£100,000+	11
Prefer not to answer/ Don't know	12

THANK AND CLOSE