

COVID-19
Transport Survey

Telephone Survey Wave 3

Introduction

<u>The West Yorkshire Combined Authority</u> commissioned 4 waves of telephone surveys of West Yorkshire residents to be conducted during the spring/summer of 2020, aimed at exploring attitudes and impacts of COVID-19 on transport.

Fieldwork (wave 3): 12-19 August 2020

Sample: 700 West Yorkshire residents with guotas for age, gender, district and

ethnicity, making it a representative sample of the West Yorkshire

population.

Survey method: 10-minute telephone interview.

Structure: Impacts on work and employment

Impacts on travel behaviour

Walking and cycling trends

Future trends

Home working

Notes and definitions

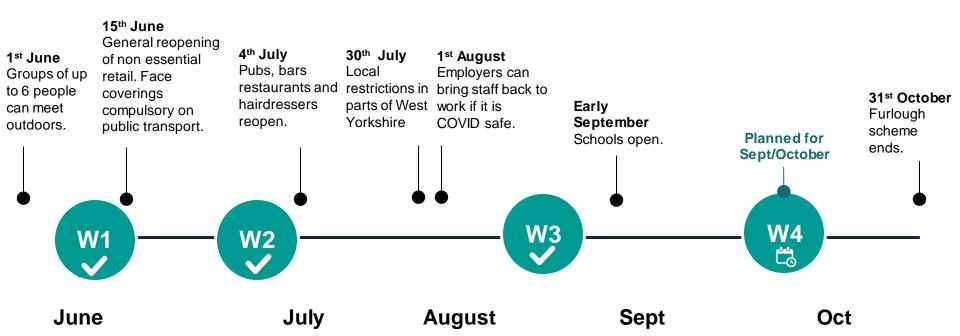
- Throughout this report, the use of the term significantly, or significant refers to statistical significance at the 95% level using the Wilson Score method^{1,2}.
- The term 'public transport user' is applied to those using public transport at least once a month.

² Newcombe RG, Altman DG. Proportions and their differences. In Altman DG et al. (eds). Statistics with confidence (2nd edn). London: BMJ Books; 2000: 46–8.



¹ Wilson EB. Probable inference, the law of succession, and statistical inference. J Am Stat Assoc 1927; 22: 209–12.

Survey timing



The timeline above is for context when interpreting the results. Importantly, the first wave was conducted before re-opening of non-essential retail on the 15th June. The second wave was conducted a week before pubs, bars, cafes, hairdressers and places of worship re-open on the 4th of July. The third wave of the survey commenced on Wednesday 12th August to capture behaviours and attitudes to travel in relation to changes in government advice at the start of August, this included encouraging more people to return to their usual workplace and the start of the 'eat out to help out scheme'.

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Executive summary (I)

Impacts on work and employment

- Compared to before COVID, around 37% of those currently in employment have seen their working hours altered; 15% reported working more hours than before, whereas 12% reported working fewer hours; 10% are on furlough.
- 80% of respondents commuted to the same place most days before COVID and of these, 87% indicated that their working premises are already open or will do so in the next few days.

Changes in travel behaviour

- Comparison of mode choice from before COVID to intentions over the coming weeks reveals:
 - o consistent avoidance of public transport for commuting trips over the 3 survey waves.
 - mode preference moves away from bus, towards car use for socialising, leisure or exercise trips. Interestingly, over the 3 survey waves, intention to use the car for socialising, leisure and exercise has grown whilst walking has decreased.
 - o a shift towards car (61% to 69%) for other travel into city centres, moving away from bus (25% to 18%), and *significantly* away from train (18% to 10%).
 - only modest changes for mode share for main grocery shopping trips.
 - o a move away from motorised modes and towards walking for local grocery shopping.



Executive summary (II)

Walking and cycling trends

- 1 in 3 respondents reported walking or running more than before COVID (40% said about the same).
- 1 in 4 reported cycling more than before COVID (1 in 2 said about the same).
- The main reason cited for increased walking/running and cycling was for leisure or exercise (54% and 73% respectively), with only 3% stating that concerns about using public transport motivated this change.

Short-term trends

- In all 3 survey waves respondents were asked if they plan to do various activities over the coming weeks more than, the same as or less than before COVID. The results reveal:
 - 47% said they will travel by bus less, consistent across waves 1-3.
 - 47% said they will travel by train less, but this has reduced significantly since wave 1
 - 27% will walk more for utility purposes and 36% will walk more for recreation.
 - 29% expect to travel by private car less and in contrast 13% say they will do so more.
 - 20% of public transport users expect to use a car/van more than before COVID, significantly more than non-users of public transport (8%).
 - Notably, the proportion of respondents who said they would travel by train, by car, walk for utility, and shop online 'the same' as before COVID has increased significantly compared to wave 1 indicating a potential return to some pre-COVID behaviours.

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 Combined Authority

Executive summary (III)

Short-term trends (cont.)

- Of the public transport users who said they would travel by bus or rail less in the coming weeks (compared to pre-COVID), the most common alternative action, was that they would stay at home more instead (58%), consistent with previous survey waves.
- Just under a third of respondents reported being very concerned about COVID-19 in general and just over a fifth said they would be very concerned about using public transport over the coming weeks.
- Notably, compared to survey wave 1, the proportion of respondents who said they were very concerned about using public transport has reduced significantly from 29% to 22%, whilst those who said they were not at all concerned has increased significantly (from 24% to 34%), signalling that people are becoming more comfortable with using public transport again.
- Respondents who declared their intention to use public transport in the coming weeks are significantly less concerned about public transport usage than those not travelling by public transport in the near future and non-users, and this has grown further since wave 1.
- The majority of public transport users with an opinion (i.e. excluding 'don't know' answers) think the bus and rail network are being managed very well or quite well (66% and 68% respectively).



Executive summary (IV)

Short-term trends (cont.)

The majority of respondents (67%) said they are unlikely to change their commuting times in the coming weeks, however public transport users are more inclined to change their times than other commuters. Interestingly, respondents who are currently commuting to work are less likely to travel to work at different times in the coming weeks than those who are currently working from home all or some if the time

Home working

- Compared to survey wave 1, significantly fewer respondents reported they were working at home (35% vs 47% in wave 1).
- Respondents continue to report that home working has been an overwhelmingly positive experience (64% positive vs 5% negative), consistent with survey waves 1 and 2.
- This latest survey provides further evidence of a sustained preference for more home working in the long term compared to pre-COVID; 63% of respondents said that in the long term, they are likely to work at home more often than before lockdown. These results are consistent with previous waves, with a subtle shift in respondents selecting 'very likely' over 'likely'.



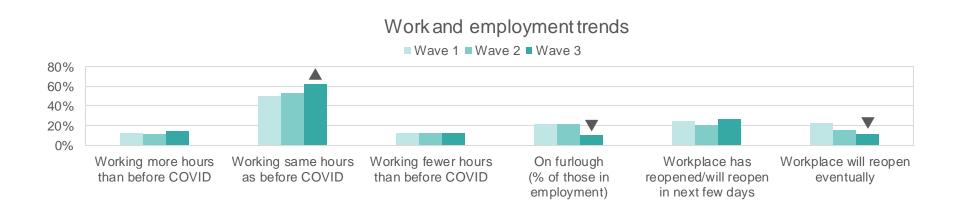




Wave 1 - Wave 2 Trends

W1-W3 trends: work and employment

The evolution of employment indicators is consistent with the recovery of the economic activity since wave 1, with a *significantly* higher proportion of respondents returning to pre-pandemic hours of work. There has also been a *significant* decrease in the number of furloughed employees and as more business return to activity, there is lower uncertainty about the reopening of the usual workplace.

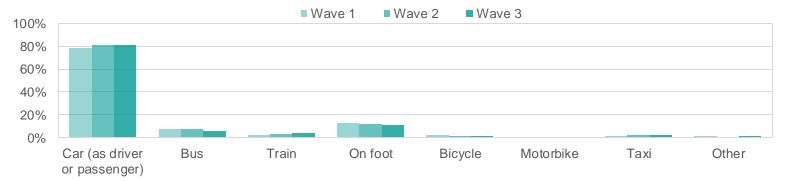




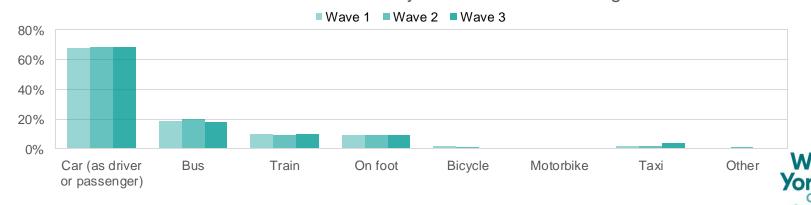
W1-W3 trends: Modal choice by trip purpose (I)

A modest increase in the number of respondents intending to travel by car and train for trips to work over the coming weeks is observed, with a similar decrease for bus and walking commutes; for other travel into city centres over the coming weeks (i.e. different from for work, grocery shopping or socialising/leisure), preference for car use and walking increases slightly, while public transport fluctuates.





Modal choice: other travel into city centres over the coming weeks



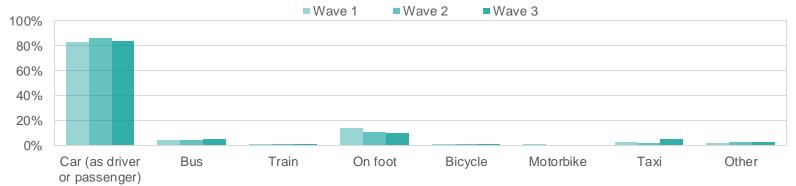
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W1-W3 trends: Modal choice by trip purpose (II)

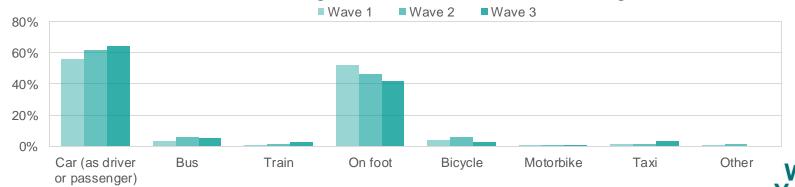
Intended mode choice over the coming weeks for main grocery shopping trips show a slight increase in bus use, fluctuating car use and stabilizing levels of walking.

For socialising, leisure and exercise, increases in car and train use are reported. Walking decreases while bus and cycling fluctuate at low levels.





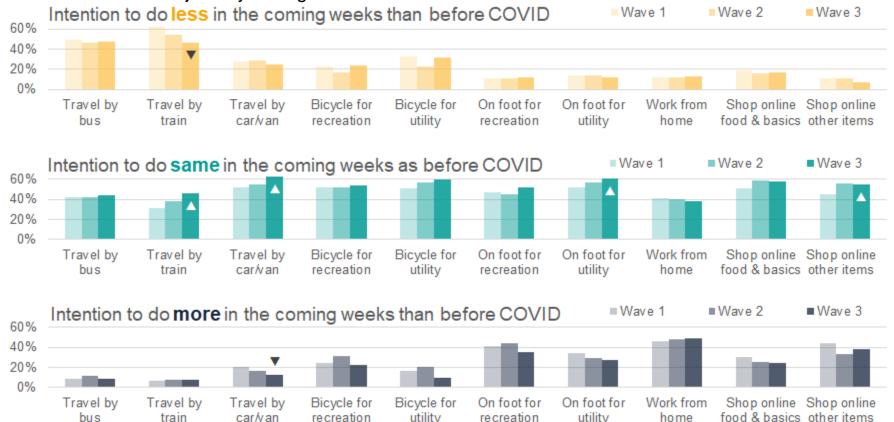
Modal choice: socialising, leisure or exercise over the coming weeks



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W1-W3 trends: travel and alternative activity

The charts below reveal gradual increases in respondents intentions to do 'the same' as pre-COVID over the 3 survey waves, indicating a potential return to some pre-COVID behaviours, with the exception of home working. There is little change in intentions to travel by bus, however empirical evidence reveals an increase in the number of bus journeys being made.



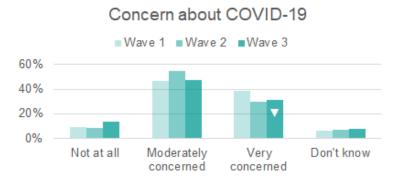
▲ / ▼ denote significant changes in the responses compared to wave 1.

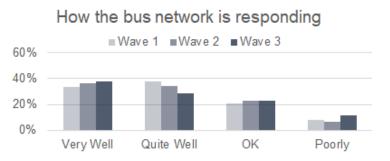
Q: Over the coming weeks do you think you will do each of the following more, less, or the same as COVID? Base (in brackets): People who were routed to answer the question, excluding 'not applicable' responses.



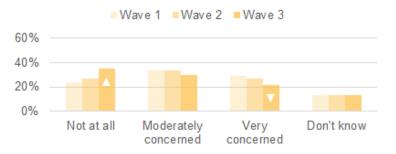
W1-W3 trends: concerns & network responses

There has been a *significant* reduction in the proportion of respondents who said they were very concerned about COVID-19 in general and about using public transport in the near future. Opinions on how the bus and rail services are responding have improved over time, with an increase in the proportion of respondents who say networks are responding very well; however there has also been an increase in the proportion of respondents who believe the bus network has responded poorly. Note that the base for the rail network is small.

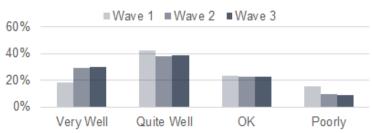




Concern about using public transport



How the rail network is responding



▲ / ▼ denote significant changes in the responses compared to wave 1.

Q: How concerned are you about COVID-19? Base: 700 each wave

Q: Would you be concerned about using public transport over the coming weeks? Base: 700 each wave

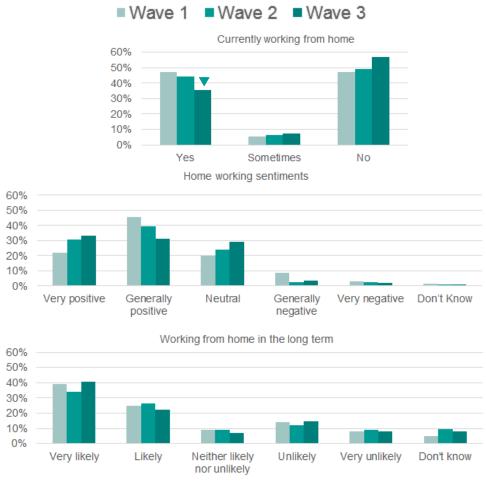
Q: How well or poorly do you think these services in West Yorkshire are responding to the current situation? Bases: Bus wave 1 = 140, wave 2 = 147, wave 3 = 162; Rail wave 1 = 59, wave 2 = 61, wave 3 = 98



W1-W3 trends: home working

Compared to wave 1, significantly fewer respondents reported they were working at home (35% in wave 3 and 47% in wave 1). Overall, the time series reveals a sustained preference for more home working in the long term compared to pre-COVID.

▲ / ▼ denote significant changes in the responses compared to wave 1.





Q. How do you feel about working from home at the moment?



Q. In the long term, how likely are you to work from home more often than you did before the lockdown?



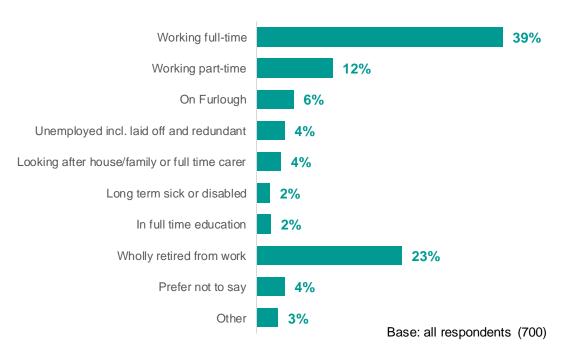


Impact on work and employment

Current working status

51% of respondents are in employment, with 39% currently working full-time and 12% working part time; 1 in 10 workers in the sample are currently on furlough.

Current working status of respondents

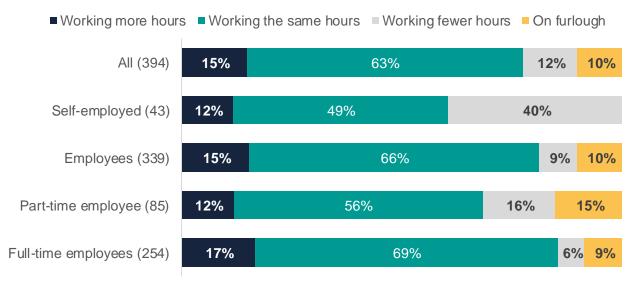




COVID-19 impacts on working hours

The data suggest a certain return to previous activity, with 37% of respondents stating their working hours are different from those before the lockdown (down 10% from wave 2). There is also a slightly higher percentage of respondents who say they are working more hours, rather than less. Self-employed are the exception, however, with a *significantly* higher proportion of respondents in this group stating they are working fewer hours than before the lockdown. 1 in 10 respondents in employment are currently on furlough.

Impacts of COVID-19 on working hours, by working status



Base: those currently working or furloughed (exc.. those not working before lockdown)

Q: Are you ...? Working more hours than before lockdown | Working fewer hours than before lockdown | Working the same number of hours | Not working before lockdown

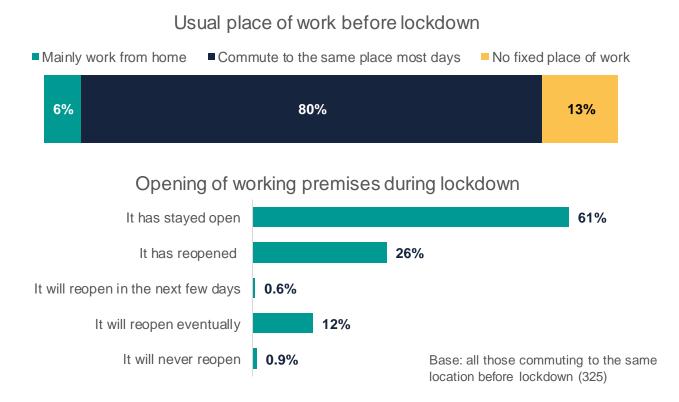




Q: Are you... Currently working | On furlough | Neither | Prefer not to say

Impact of lockdown on working premises

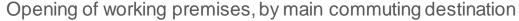
80% of respondents commuted to the same place most days before lockdown; of these, 87% indicated that their working premises are already open or will do so in the next few days, although 71% also indicated there are restrictions in the number of people allowed in; 12% expect their working premises to reopen in the longer term, and just 0.9% of the people interviewed say their work place will not reopen.

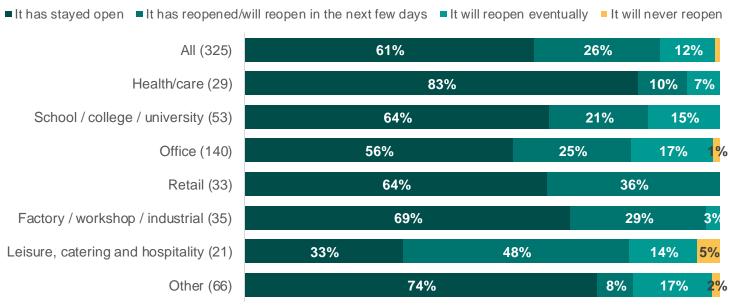




Impact of lockdown on working premises, by sector

87% of respondents stated their usual workplace stayed open during lockdown or has reopened already; however, whereas 97% of those working in the industrial sector and a staggering 100% of those working in retail said their working premises are already open, officers and those in the education sector and leisure/hospitality are seeing a slower return to their usual premises. The impact on the latter is reflected in *significantly* lower levels of activity during the lockdown and the highest proportion of respondents (5%) admitting their usual workplace will never reopen.





Base: all those commuting to the same destination before lockdown

Q: Thinking about that place, which of the following are true or false? It has stayed open during the lockdown | It has reopened | I expect it will reopen in the next few days | I think it will reopen eventually | I think it will never reopen



Q: What was your main commuting destination before lockdown?

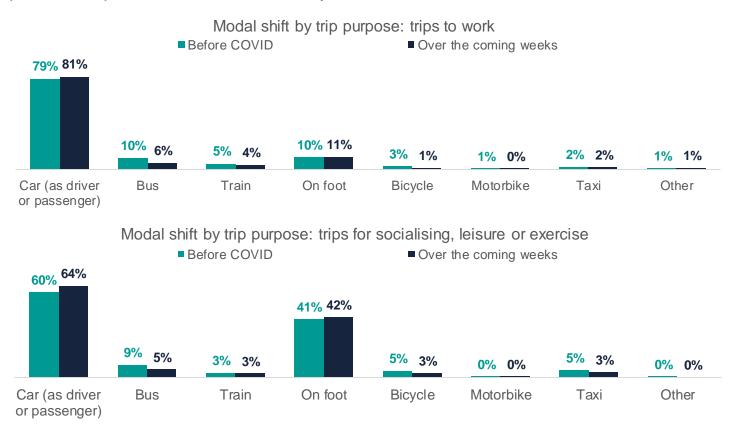




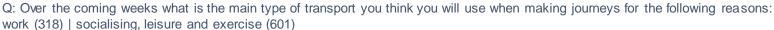
Impact on travel behaviour

Mode shift: work / socialising and leisure

Comparison of mode choice from before lockdown to intentions over the coming weeks suggests modest avoidance of public transport for trips to work. For socialising, leisure or exercise trips, mode preference moves away from bus, towards car use.



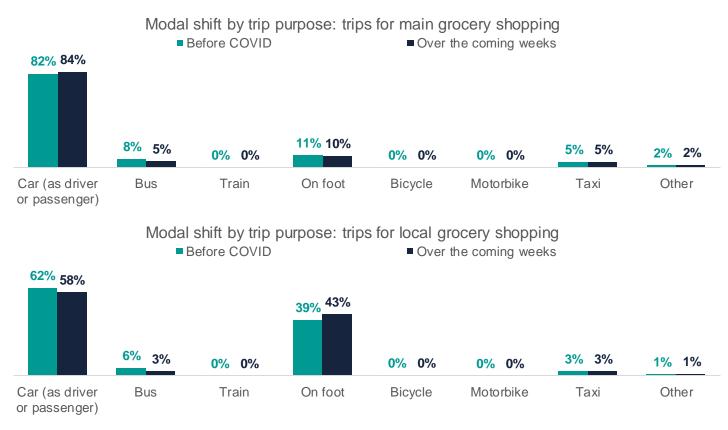
Q: Before 'COVID' what was the main type of transport you used when making journeys for the following reasons: work (394) | socialising, leisure or exercise (633)

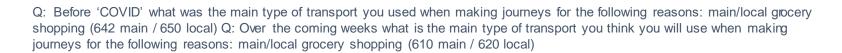




Mode shift: grocery shopping

Intentions for mode of travel for main grocery shopping over the coming weeks show modest change, with a decrease in bus use. For local grocery shopping, intentions move away from motorised modes and towards walking.

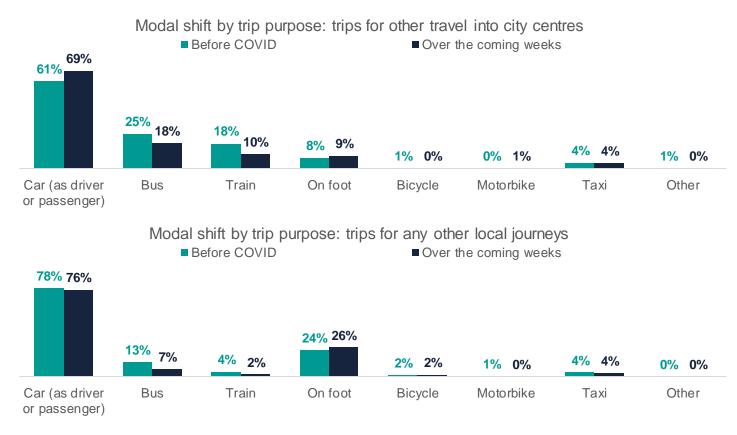


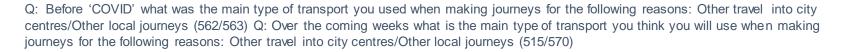




Mode shift: other local trips

Modal choice for other travel into city centres over the coming weeks shifts towards car, moving away from bus, and *significantly* from train. For other local journeys, intentions move *significantly* away from bus with decreases in car and train use, and an increase in walking.







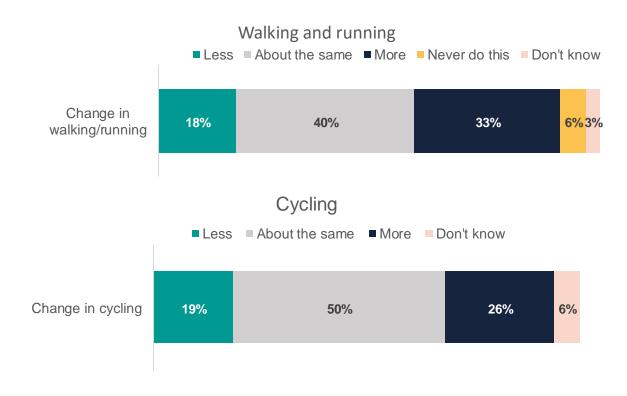




Walking and cycling

Change in walking/running and cycling

33% of respondents are walking or running more than before COVID, and 26% cycling more. The largest proportion of respondents in both cases report no change to activity levels.



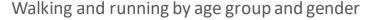


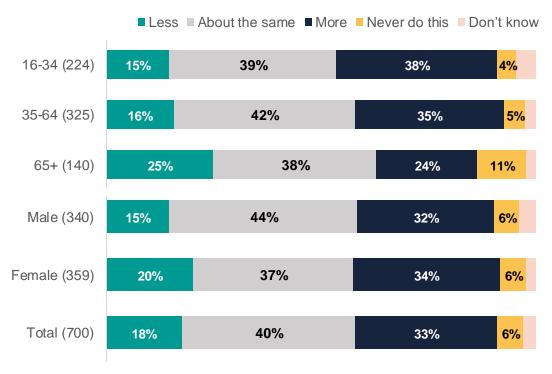
Q: Are you walking/running any more or any less than you did before COVID? (700)

Q: Are you cycling any more or any less than you did before COVID? (167)

Change in walking/running

Younger age groups were more likely to be walking or running more, and a quarter of respondents in the 65+ age group were walking or running less.

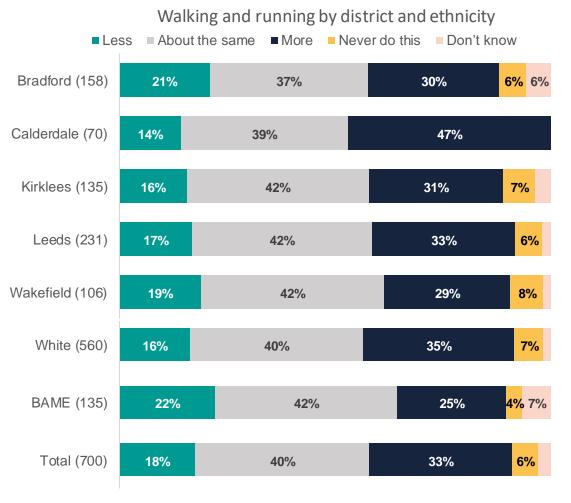






Change in walking/running

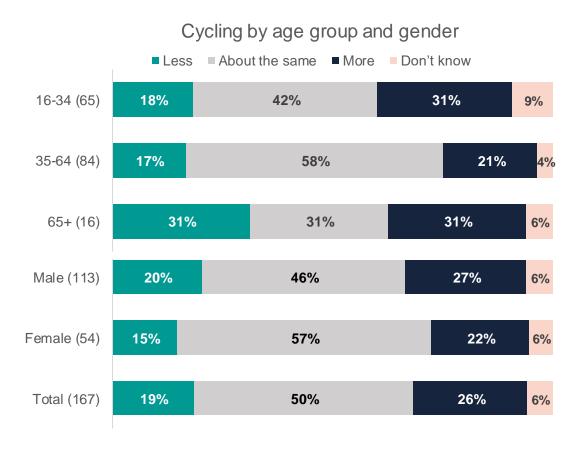
More respondents in the BAME group reported walking or running less. Almost half of Calderdale respondents said they were walking or running more.





Change in cycling

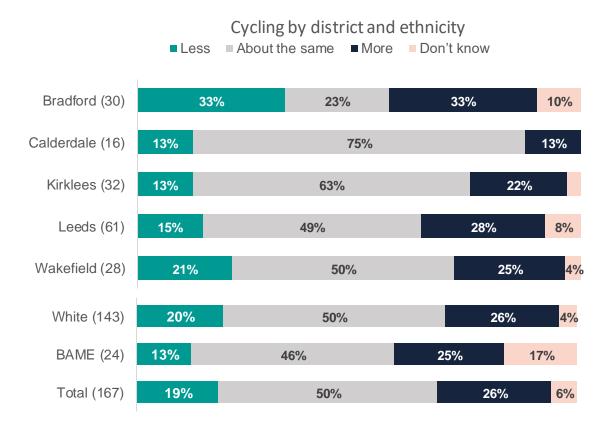
The lockdown appears to have caused different impacts across age bands rather than gender; however no *significant* differences can be reported due to the relatively small sample sizes.





Change in cycling

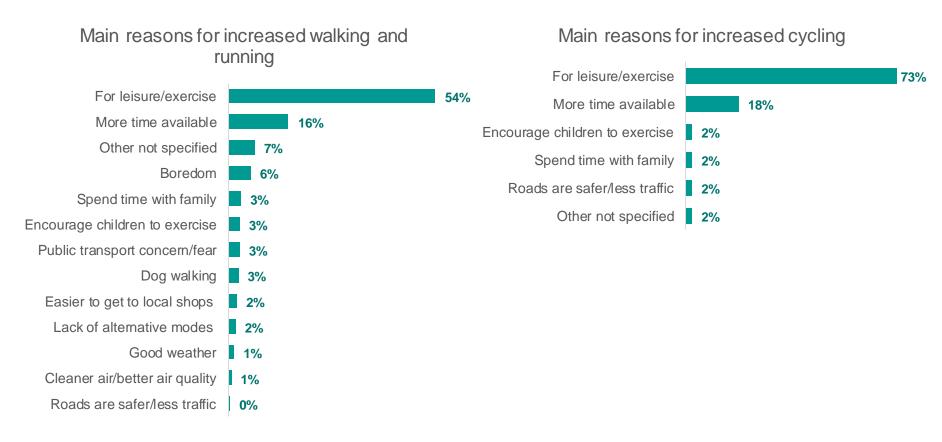
Overall, a higher proportion of respondents report cycling more, rather than less, than before the lockdown, across districts and ethnic backgrounds; however, the *significance* of this change cannot be determined, due to the relatively small size of the samples.





Reasons for increased walking and cycling

The main reason for increased walking and running is for leisure or exercise (54%), likewise for cycling (73%). Having more time available was the second most common response for both modes. 3% of those walking and running more had concerns about public transport.





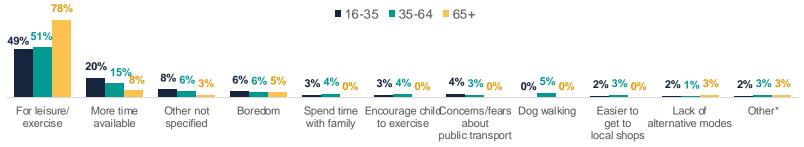
Q: What would you say are the main reasons that you are cycling more? (43)



Main reasons for increased walking and running by age group and gender

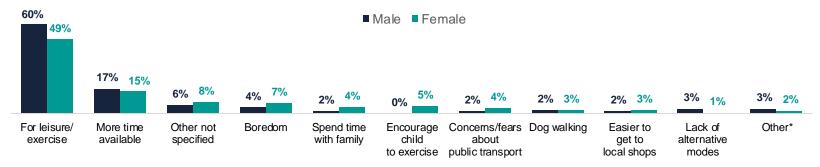
The main reason for increased active travel across all age groups was leisure/exercise, with the 65+ age group reporting this the most. More respondents in the 16-35 group reported having more time available as a main motivation. For more male than female respondents, this was leisure or exercise.

Main reasons for increased walking and running by age



^{*} Includes: because of good weather (16-35: 1%; 35-64: 2%); cleaner air / better air quality (35-64: 1%; 65+: 3%); because the roads are safer/less traffic (16-35: 1%)

Main reasons for increased walking and running by gender



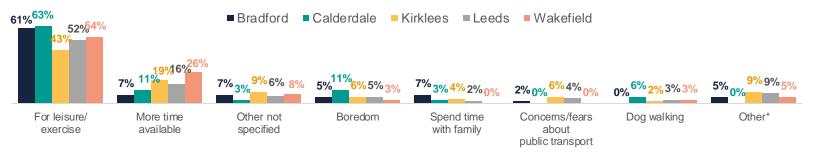
^{*} Includes: because of good weather (Male: 2%; Female: 1%); cleaner air / better air quality (Male: 1%; Female: 1%); because the roads are safer/less traffic (Male: 1%)



Main reasons for increased walking and running by district and ethnic background

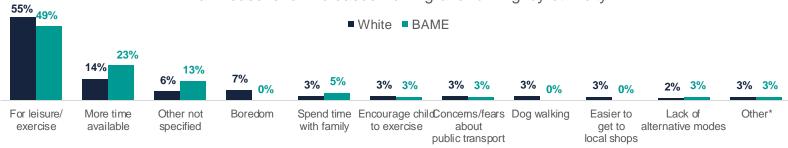
Fewer Kirklees respondents mentioned leisure/exercise as the main motivation for increased active travel. BAME respondents listed leisure/exercise at a lower level, and having more time available and other reasons at a higher level. These charts have not been produced for cycling due to the relatively low sample size (43 respondents).





^{*} Includes: easier to get to local shops (K: 4%; L: 3%; W: 3%); lack of alternative modes (B: 2%; K: 2%; L: 3%); because of good w eather (B: 2%; K: 4%; L: 1%); cleaner air / better air quality (B: 2%; W: 3%); because the roads are safer/less traffic (L: 1%)

Main reasons for increased walking and running by ethnicity



^{*} Includes: because of good w eather (White: 2%); cleaner air / better air quality (BAME: 3%)





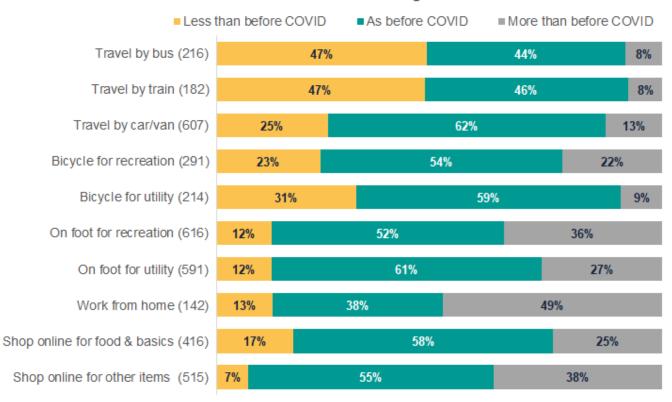


Future trends

Changes in travel activity

47% of respondents state they will travel by bus less in the coming weeks than before lockdown, and 47% will travel by train less; 27% will walk more for utility purposes, and 36% will walk more for recreation in the near future. Almost half of respondents (49%) say they will work from home more in the near future than before the lockdown.

Intentions over the coming weeks

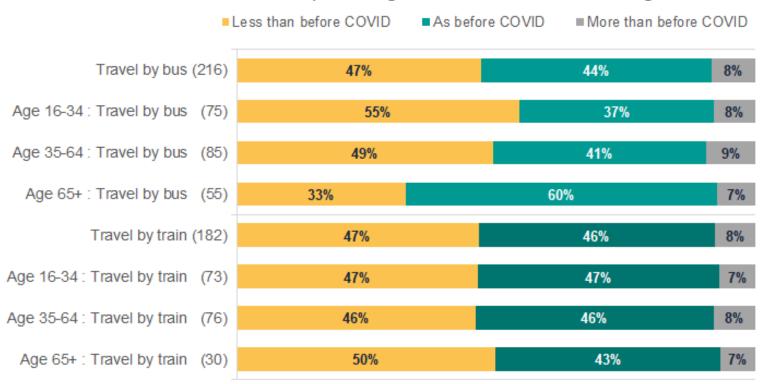




Public transport usage intentions by age

A significantly greater proportion of respondents say they will travel by bus and train less in the near future than before COVID, compared with people who say they will use them more. This is true for both modes and across all ages in this wave. Significantly more respondents aged 65+ said they will travel by bus the same as before COVID than said they would do so less.

Public transport usage intentions over the coming weeks

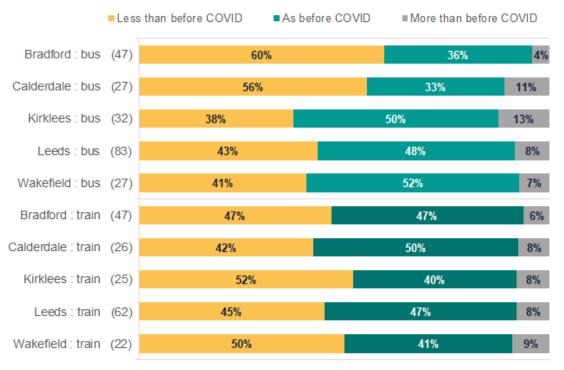




Public transport usage intentions by district

Data at a district level does not reveal a lot. Local restrictions on households meeting were in place in Bradford, Calderdale and Kirklees at the time of the survey. It appears that more residents of Bradford and Calderdale would use the bus less than before COVID than those of other districts including Kirklees where the same restrictions applied, but even the biggest difference between 60% in Bradford and 38% in Kirklees is *not significant*.



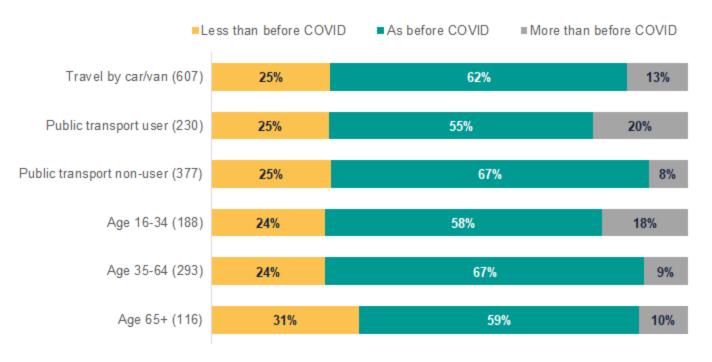




Private car / van usage intentions

25% of respondents expect to travel by private car less in the near future than they used to before COVID and 13% say they will do so more. 20% of public transport users expect to use a car/van more than before COVID, which is *significantly* more than non-users of public transport. Interestingly, 18% of respondents aged 16 to 34 intend to use a car or van more than before COVID which is *significantly* more than for people aged 35 to 64 (9%).

Car / van usage intentions over the coming weeks

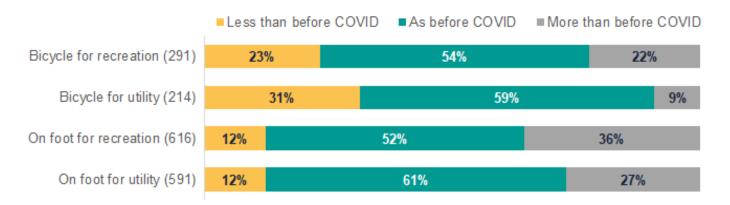




Active travel intentions

Comparing intentions over the coming weeks with before COVID, overall results suggest similar levels of cycling for recreation and a decrease in utility cycling, i.e. any increases in cycling will be due to recreational cycling. In contrast, the survey predicts increased walking, both for utility and recreation.

Active travel intentions by purpose

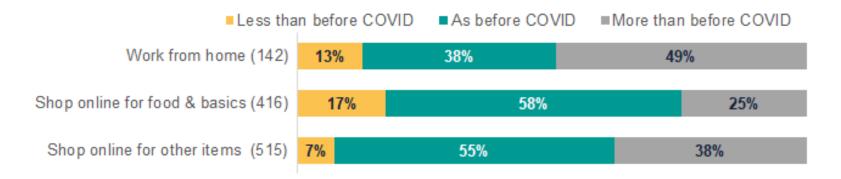




Alternatives to travel

A *significantly* higher proportion of respondents will work from home more, rather than less, compared to pre-lockdown. A *significantly* higher proportion of respondents will shop online more, rather than less, compared to pre-lockdown. The proportions who expect to work from home more than before lockdown has increased slightly and the proportion who expect to shop online has reduced slightly compared to Wave 1 of the survey.

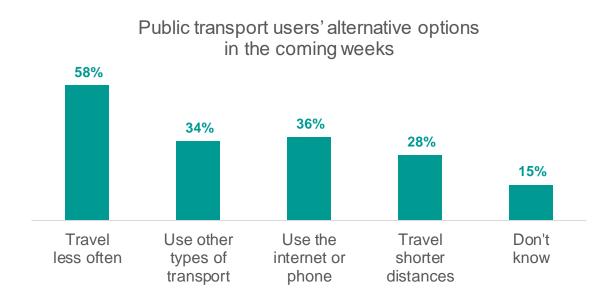
Alternatives to travel over the coming weeks





Alternatives to public transport

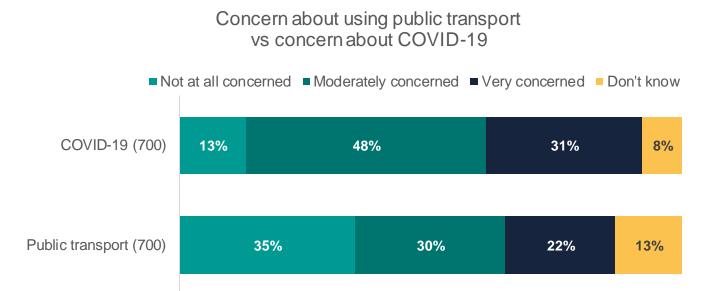
A *significantly* higher proportion (58%) of public transport users who said they would travel by bus or rail less in the coming weeks state they will stay at home more instead. In this wave there is *no* significant difference between the three other behaviours, with slight increases in the percentage saying they would use the internet or phone more and would travel shorter distances compared with previous waves.





Concerns about COVID-19 vs public transport use

Across all respondents *significantly* fewer were not at all concerned about COVID-19 than not at all concerned about using public transport.



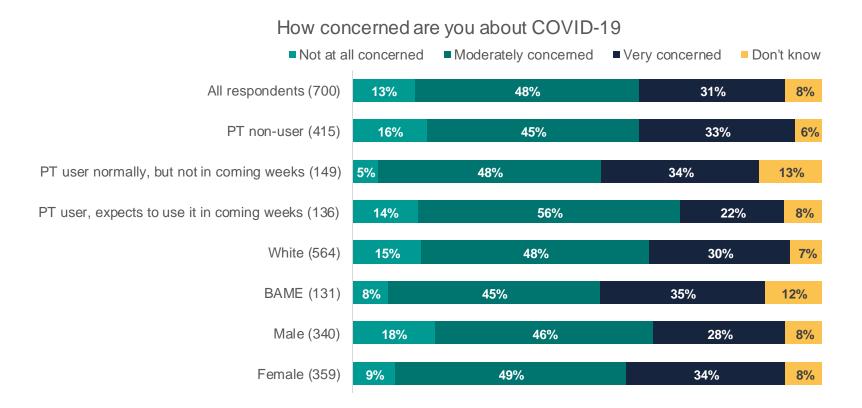


Q: How concerned are you about COVID-19?

Q: Would you be concerned about using public transport over the coming weeks?

Concerns about COVID-19

When asked about concerns about COVID-19, the most common response was moderately concerned. 18% of male respondents said they were not at all concerned, compared to 9% of females.



Q: How concerned are you about COVID-19?

Q: Over the coming weeks what is the main type of transport you think you will use when making journeys for the following reasons ...?



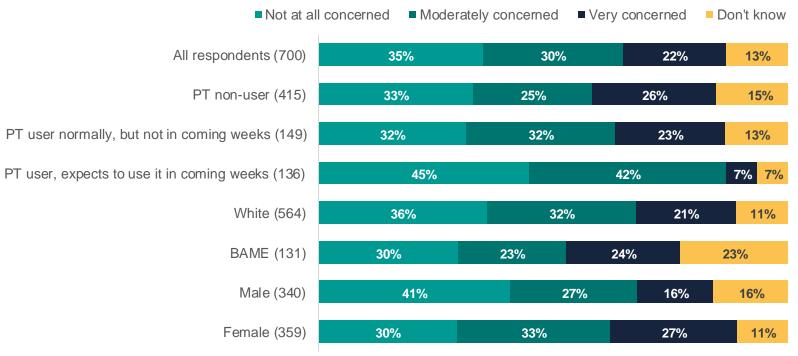
Q: How frequently did you travel by public transport before COVID?

Concerns about public transport usage

Significantly fewer respondents who declared their intention to use buses or trains in the near future said they were very concerned about using public transport though more are moderately concerned than other respondents.

Significantly more women stated that they are concerned about public transport usage, with more females stating they are 'very concerned' than males.



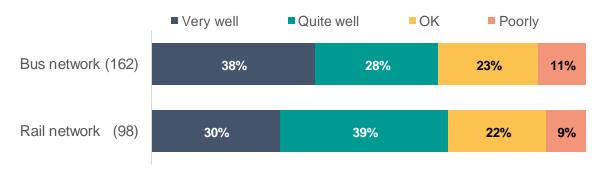




Users' opinions on public transport management

Many **public transport users** interviewed do not have an opinion on how the bus and rail networks are being managed in the current situation. Of those who had an opinion, 66% said the bus network was being managed very well or quite well, and 68% said the rail network was being managed very well or quite well.



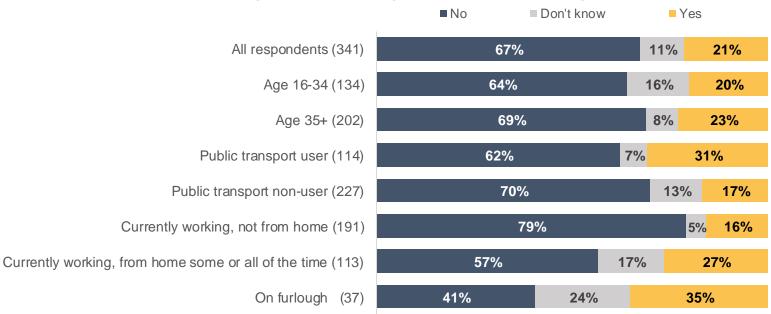




Change in commuting times

The majority of respondents are unlikely to change their commuting times. Public transport users are more inclined to change their times than other commuters. Interestingly, respondents who are currently commuting to work are less likely to travel to work at different times in the coming weeks than those who are currently working from home all or some of the time. Not surprisingly, respondents on furlough were *significantly* more uncertain about their future travel than those currently commuting.









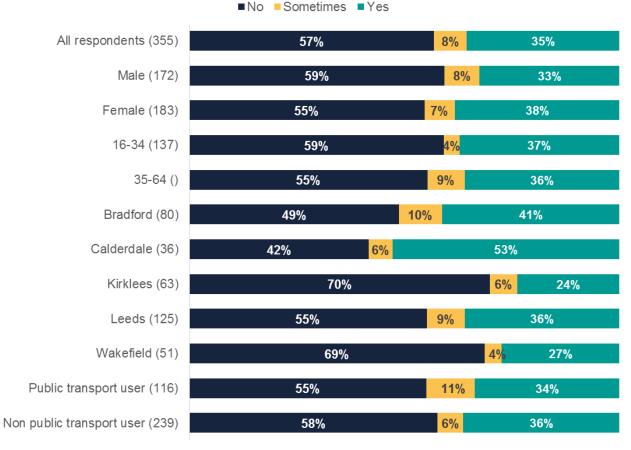


Home working

Currently working from home

At the time of the survey 35% of respondents reported they were working at home, a significant decrease from wave 1, when 47% where doing this. Notably significantly fewer regular public transport users reported working at home compared to wave 1 (34% vs 57%), and there is now little difference in home working between public transport and non-public transport users.

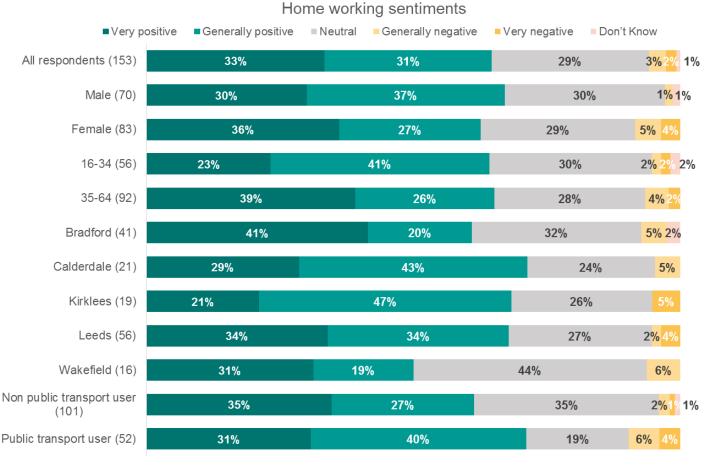
Currently working from home





Working from home sentiments

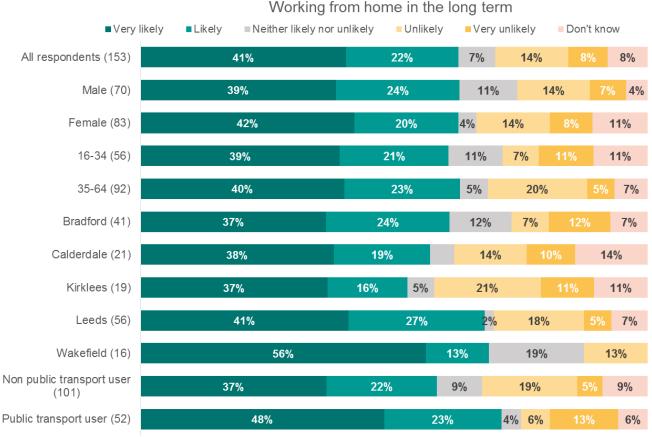
Overall, a *significantly* greater proportion of respondents found home working to be a positive experience (64%) compared to only 5% who thought this was a negative experience. The results are consistent with survey waves 1 (67%) and 2 (70%), indicating that generally over the last few months respondents have had an overwhelmingly positive experience of home working.





Working from home in the long term

A significantly greater proportion of respondents (63%), said that, in the long term, they are likely to work from home more often than before COVID, compared to 22% who said that would be unlikely. The results further support a sustained preference for more home working in the long term compared to pre-COVID.





Q. In the long term, how likely are you to work from home more often than you did before COVID? Base = 153 Note % on charts are rounded.





Respondents' demographic profile

Survey respondent demographics (I)

Age	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
16-34	224	32.0	32.4
35-64	325	46.4	46.8
65+	140	20.0	20.8
Prefer not to say	11	1.6	-
Total	700	100.0	100.0

ONS 2018 mid-year population estimates

Sex	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
Male	340	48.6	49.2
Female	359	51.3	50.8
Other	0	0.0	-
Prefer not to say	1	0.1	-
Total	700	100.0	100

ONS 2018 mid-year population estimates

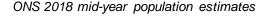
District	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
Bradford	158	22.6	22.2
Calderdale	70	10.0	9.2
Kirklees	135	19.3	18.9
Leeds	231	33.0	34.5
Wakefield	106	15.1	15.1
Total	700	100.0	100.0

The tables here allow comparison of the demographic profile of survey respondents with 2018 mid-year population estimates published by the Office of National Statistics (ONS) and the 2011 Census.

The tables illustrate that survey sample is representative of the West Yorkshire population.

Ethnic background	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
White (British and Other)	560	80.0	81.8
Black, Asian Minority Ethnic (BAME)	125	17.9	17.3
Other ethnic group	10	-	0.9
Prefer not to say	5	0.7	-
Total	700	100.0	100.0

ONS 2011 Census





Survey respondent demographics (II)

Working situation	Survey responses (count)	Survey responses (%)
On Furlough	41	5.9
Currently working	355	50.7
Neither	281	40.1
Prefer not to say	23	3.3
Total	700	100.0

Full/part time	Survey responses (count)	Survey responses (%)
Full Time (30+ hours per week)	297	75.0
Part Time (under 30 hours per week)	99	25.0
Prefer not to say	0	0.0
Total	396	100.0

Self-employed/	Survey responses	Survey responses
employee	(count)	(%)
Self-employed	48	12.1
An employee	341	86.1
Prefer not to say	7	1.8
Total	396	100.0

Employment and	Survey responses	Survey responses
education status	(count)	(%)
Part time working or	89	12.7
furloughed	05	
Full-time working or	290	41.4
furloughed	230	41.4
Wholly retired from	160	22.9
work	100	
Unemployed including	31	4.4
laid off and redundant	5	
Long term sick or	15	2.1
disabled	10	
Looking after house		
and family / full time	27	3.9
carer		
In full time education	16	2.3
In full time education	47	2.4
and working	17	
Other	24	3.4
Prefer not to say	31	4.4
Total	700	100.0

Produced by the Research and Intelligence Team at the West Yorkshire Combined Authority.

For enquiries about the survey please email: Research@westyorks-ca.gov.uk