West Yorkshire Combined Authority

COVID-19 Transport Survey

Telephone Survey Wave 2

Introduction

The West Yorkshire Combined Authority 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 2): 23-28 June 2020

Sample: 700 West Yorkshire residents with quotas 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

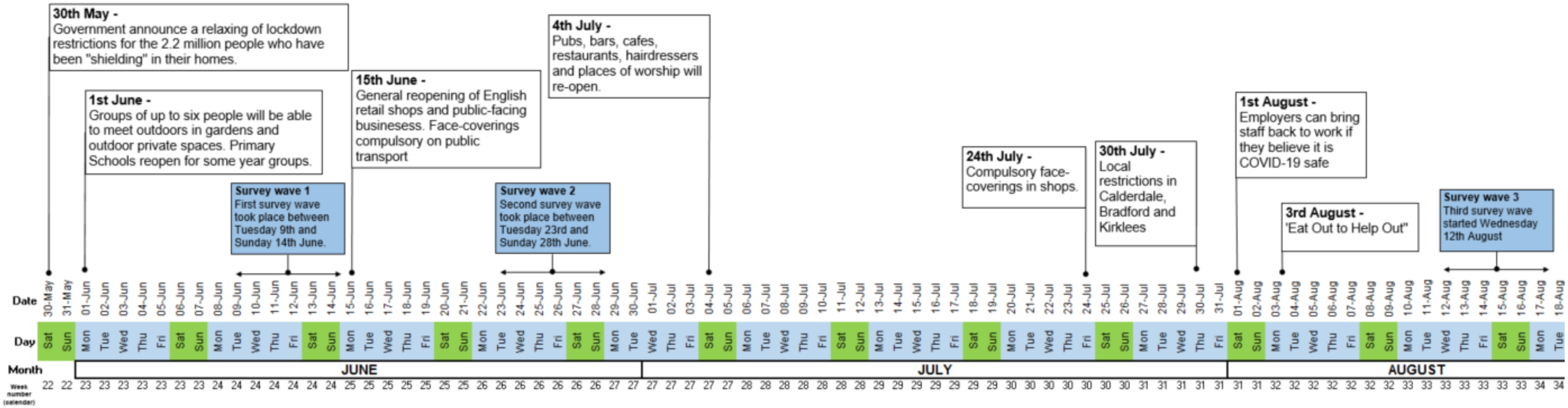
Home working

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.

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

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 lockdown, around half of those in employment have seen their working hours altered; 11% are working more hours than before, whereas 13% are working fewer hours.
- 78% of respondents commuted to the same place most days before lockdown and of these, 84% indicated that their working premises are already open or will do so in the next few days.

Changes in travel behaviour

- In terms of mode share, a decrease in public transport use is anticipated by respondents in the coming weeks, alongside an increase in active mode use, compared to the pre-lockdown situation.
- Private vehicle is expected to remain the dominant mode choice for commuting and grocery shopping, with some avoidance of public transport and a *significant* increase in walking for local grocery shopping.
- Compared to before lockdown, mode choice for any other travel into city centres over the coming weeks will shift *significantly* from bus (31% to 20%) and towards car use (63% to 69%), with some avoidance of train travel.

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Executive summary (II)

Walking and cycling trends

- Overall, 42% of respondents are currently walking and running more than before lockdown (31% about the same and 22% less).
- 39% of respondents are currently cycling more than before lockdown (39% about the same and 21% less).
- The main reasons mentioned for increased walking, running and cycling are for leisure and exercise (57%), having more free time or to combat boredom (18%), with only 3% stating that concerns about using public transport motivated this change.

Short-term trends

- 46% and 54% of respondents said they would use the bus and train less, respectively, in the coming weeks; 44% said they will walk more for recreation and 48% said they will work from home more.
- 29% of respondents anticipate to travel by private car less, with 55% and 16% expecting to use the car the same or more than before lockdown, respectively. Notably, a greater proportion of public transport users said they will travel by car more in the coming weeks than before lockdown (20%, compared to 14% for non-users).
- A *significantly* greater proportion of respondents said they will work from home and shop online more, rather than less, compared to pre-lockdown.
- Of the public transport users who said they would travel by bus or rail less, 59% said they would stay at home more and 36% said they would use other modes.

Executive summary (III)

Short-term trends (cont.)

- 30% of respondents reported being very concerned about COVID-19 in general and 27% said they would be very concerned about using public transport over the coming weeks (vs. 27% who were not concerned at all).
- 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.
- Respondents who declared their intention to use public transport in the coming weeks are less concerned about public transport usage than was reported in telephone survey wave 1.
- The majority of public transport users with an opinion (excluding don't knows) think the bus network is being managed well (71% reporting either very well or quite well).

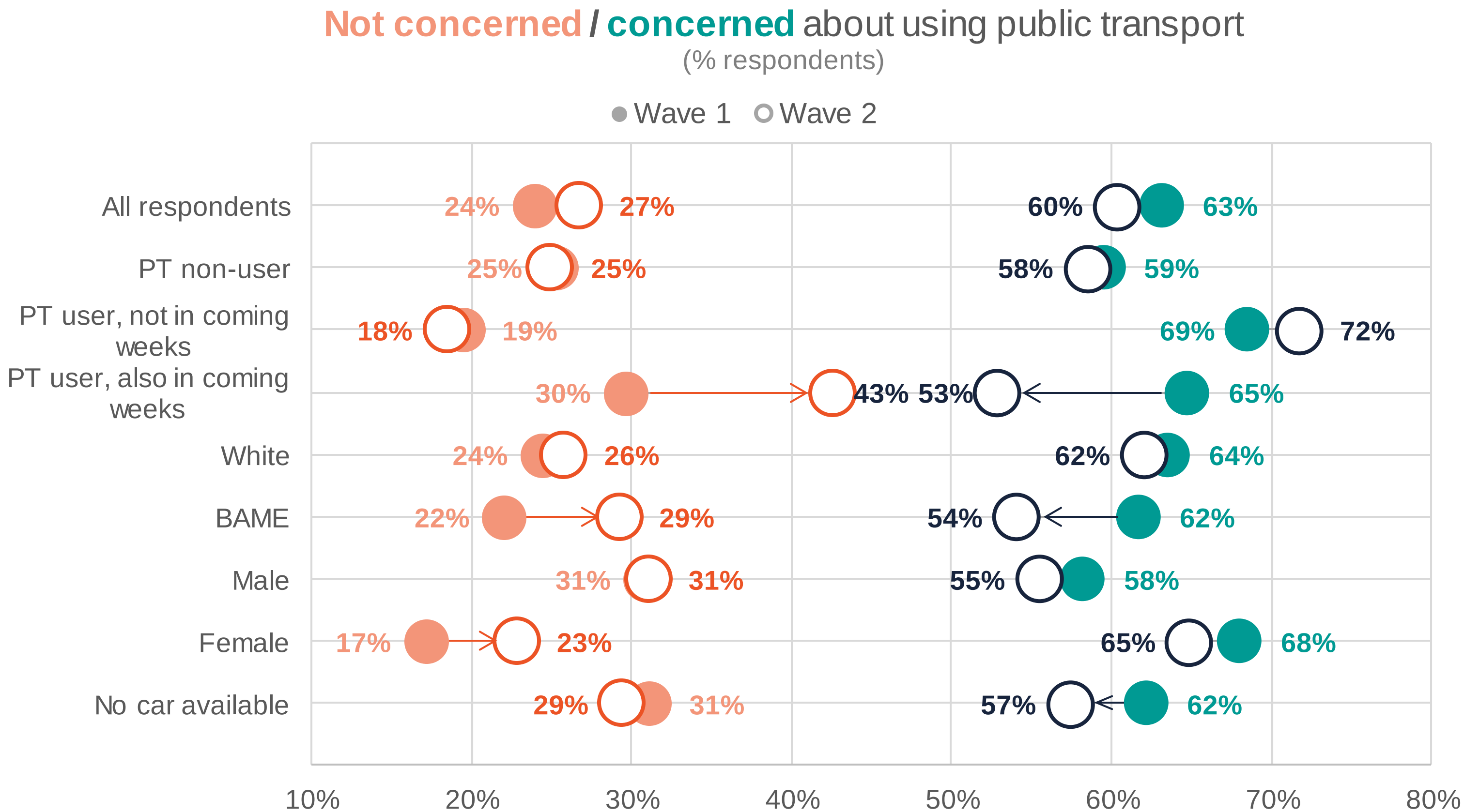
Home working

- 44% of respondents reported they are working from home, with no significant changes from the previous wave.
- Of those who were working from home, 71% of respondents found it to be a positive experience (little difference from wave 1).
- Aliging with wave 1, a *significantly* greater proportion of respondents (60%) said that, in the long term, they are likely to work from home more often than before lockdown, compared to 21% who saw it as unlikely.

Wave 1 - Wave 2 Trends

W1-W2 trends: concerns about public transport

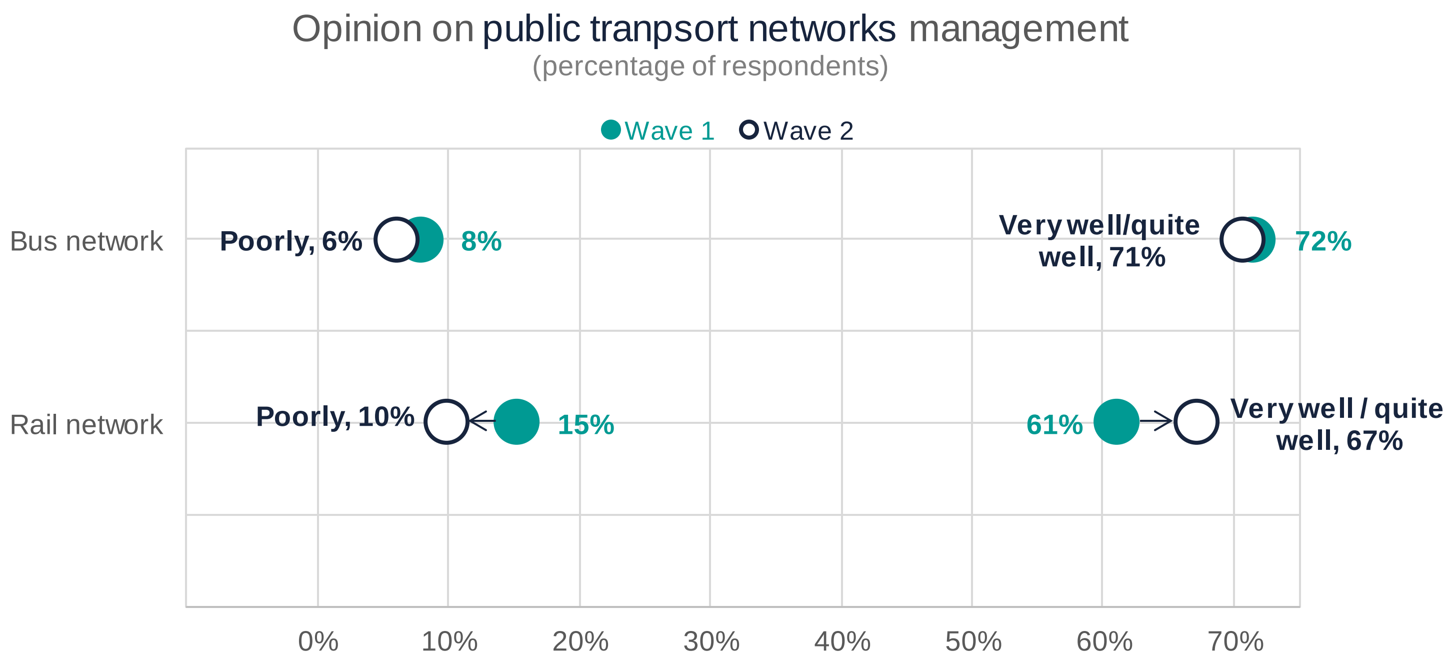
Concerns about public transport usage have decreased overall with respect to the first wave of the survey; this is particularly noticeable among current public transport users. However, there is also a group of former public transport users for whom fears about using public transport have increased, which might also explain current avoidance.



Q: Would you be concerned about using public transport over the coming weeks? Not at all concerned | Moderately concerned | Very concerned | Don't know

W1-W2 trends: transport network management

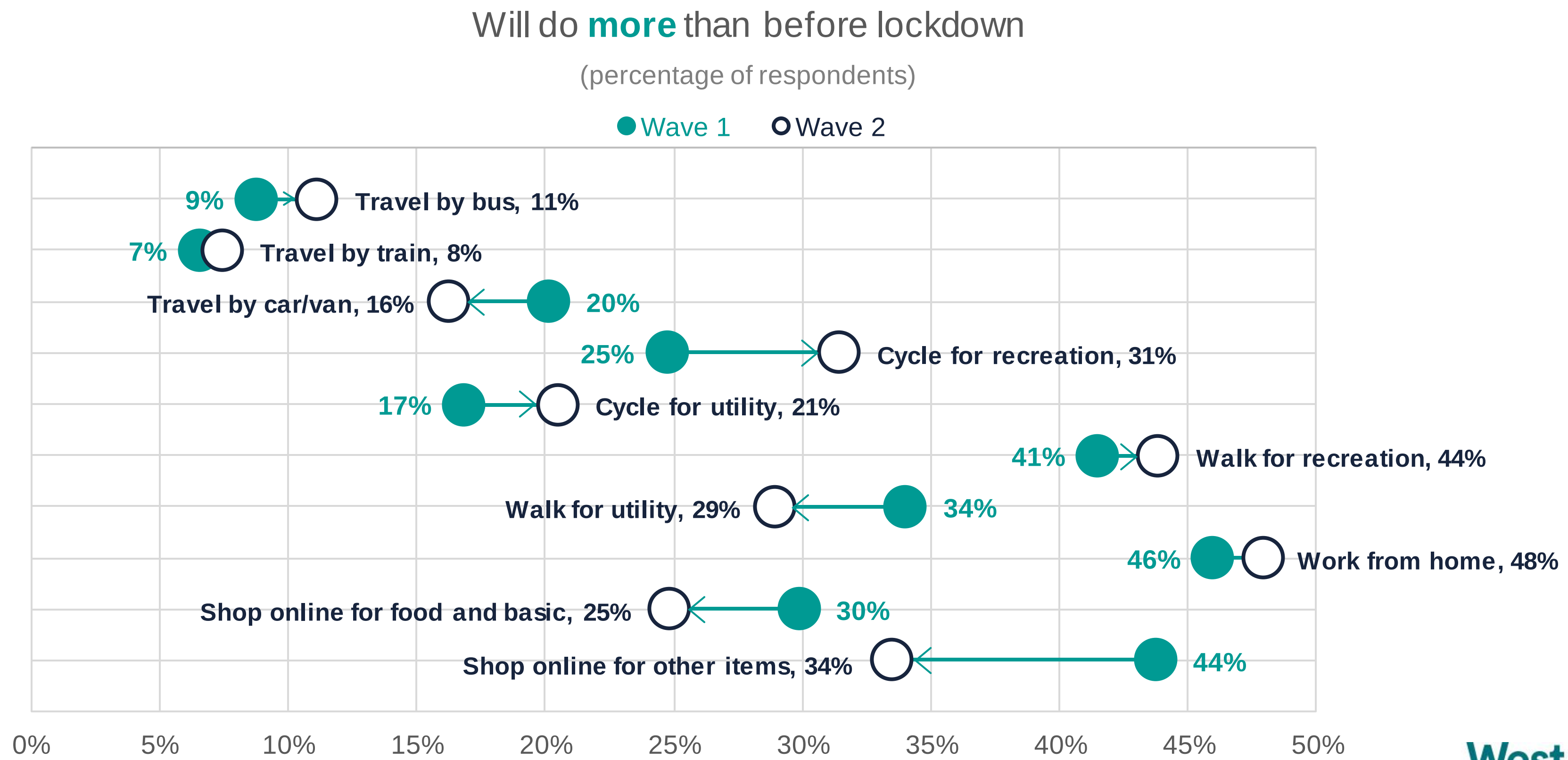
Most respondents with an opinion think the public transport networks have responded well to the new circumstances after the COVID-19 pandemic; The percentage of those considering the networks have responded well has increased by 9% for the bus network and 4% for the rail network, compared to the first wave of the survey.



Q. How well or poorly do you think these services in West Yorkshire are responding to the current situation? Very well | Quite well | OK | Poorly | Don't know

W1-W2 trends: travel intentions and habits

As mobility increases, we see an increase in the intention to travel by public transport, paired with a decrease in intentions to use private cars. There remains an appetite for cycling, especially for recreation, and there is a reduction in the number of people who expect to walk more for utility, probably associated to the increase in bus and train usage. Likewise, a decline in intentions to shop online is observed with respect to wave 1.



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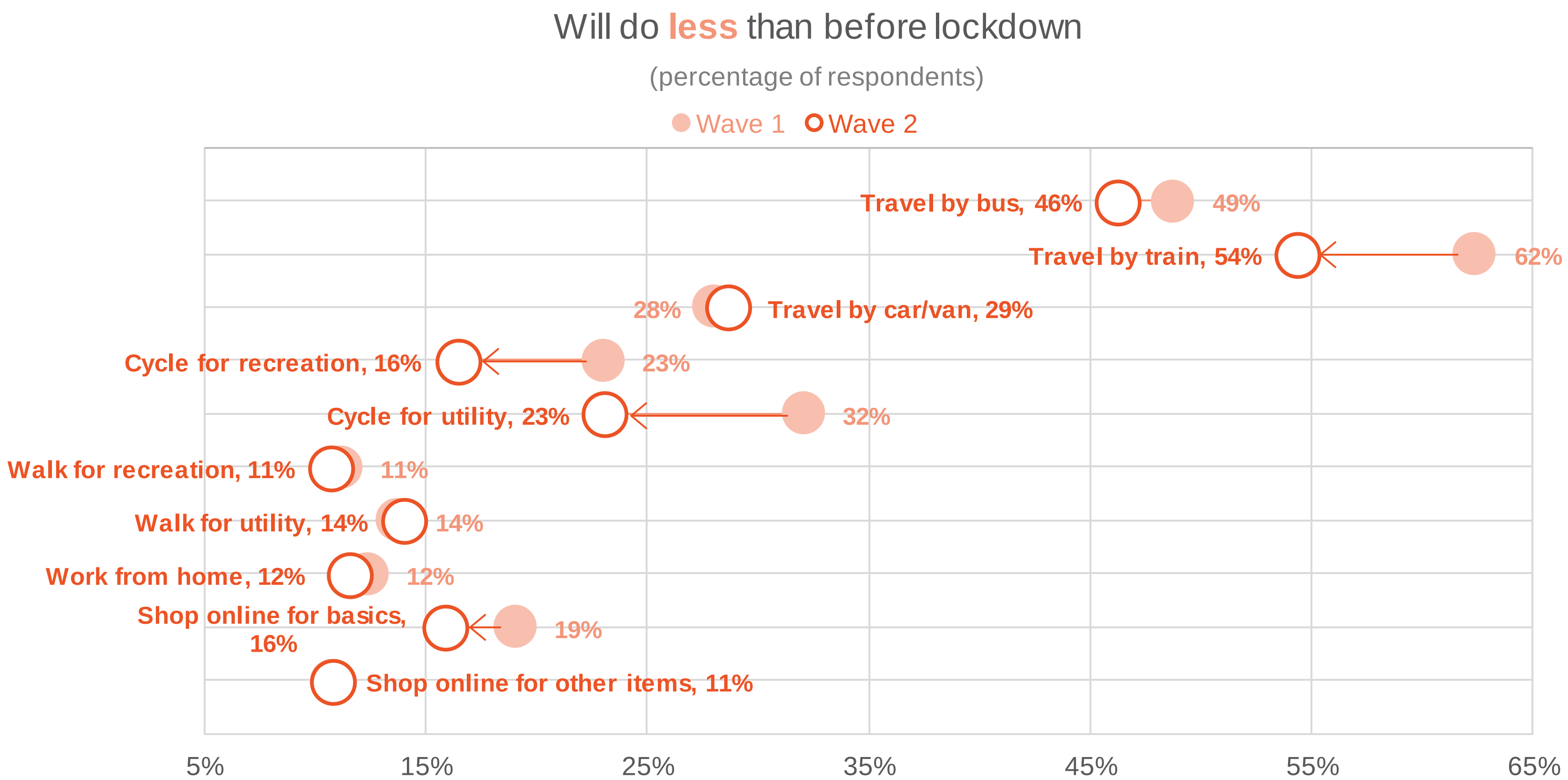
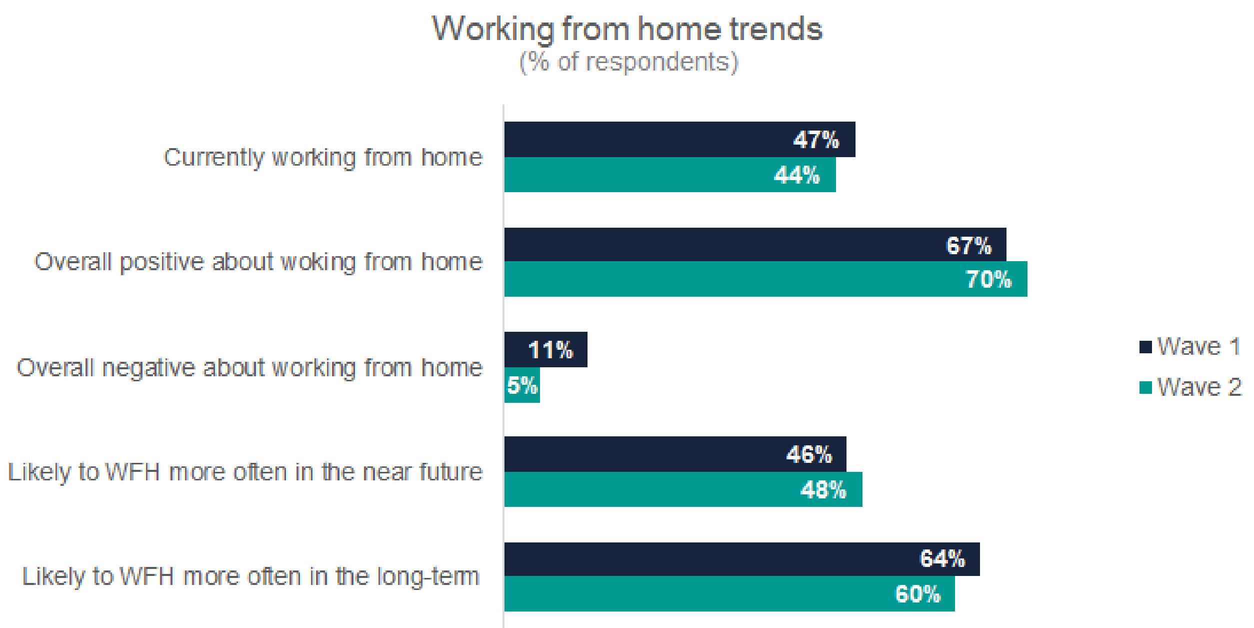
W1-W2 trends: travel intentions and habits

Again, the data seems to confirm a modest return to public transport usage, together with an increase in cycling, both for utility and recreation. There are no substantial changes in other indicators with respect to wave 1.



W1-W2 trends: home working

No substantial changes are observed in the proportion of respondents working from home with respect to the first wave; however, a greater proportion of respondents report feeling positive about working from home than in the previous wave.



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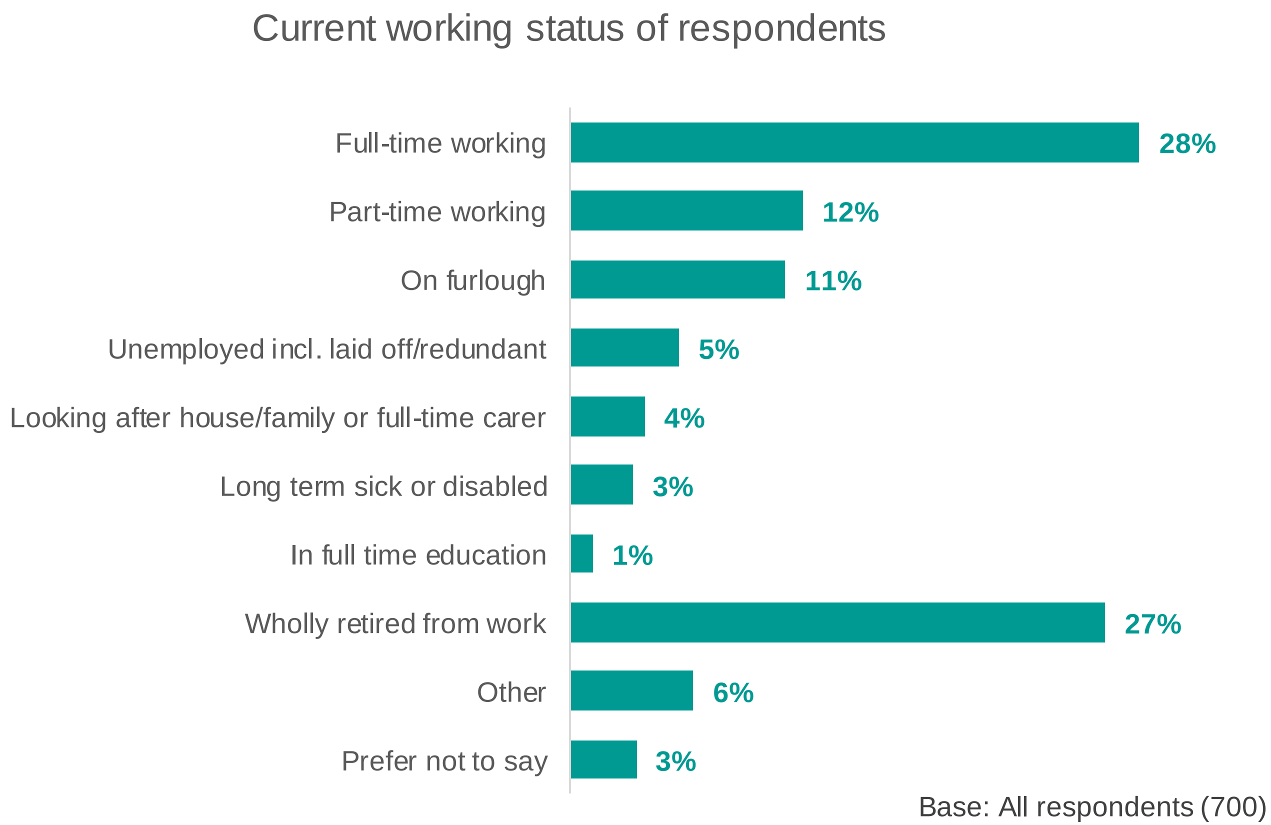
Impact on work and employment

Current working status

51% of survey respondents are in employment, with 28% currently working full-time and 12% working part time; 1 in 5 workers in the sample are currently on furlough.

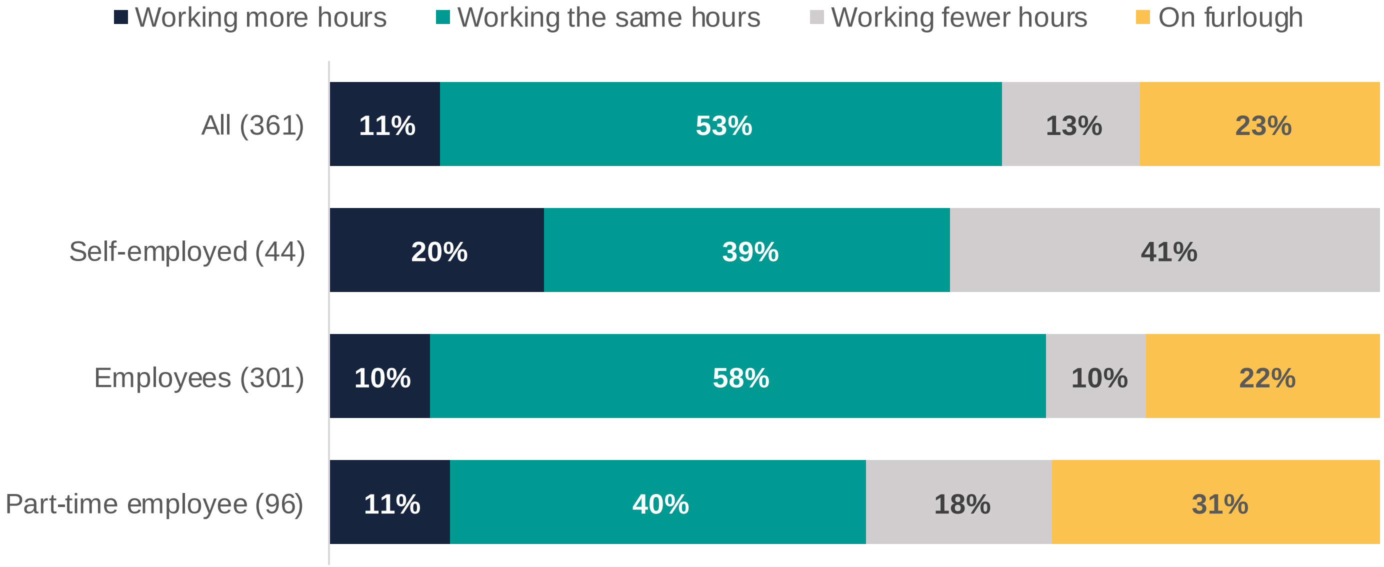


Q: Which of the following best describes your current working situation? On Furlough | Currently working | Neither | Prefer not to say
Q: Is your job full or part time (by full time we mean 30 or more hours)? Q: Are you also in full-time education? Q: Are you …? Retired | Full-time student | Laid off or made redundant because of the lockdown | Unemployed since before the lockdown | Long term sick or disabled | Looking after the house | Full-time carer | Other | Prefer not to say

COVID-19 impacts on working hours

47% of respondents have seen their working hours altered after the lockdown, and in most cases this has represented a reduction in the numbers of hours, with about a quarter of respondents (23%) being on furlough at the time of the survey. There are no statistically significant differences by employee status, gender, age or district of residence.

Impacts of lockdown on working hours, by employment status



Base: all currently working or on furlough (excl. those not in employment before lockdown)

Q: Are you… Currently working | On furlough | Neither | Prefer not to say
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…? Self-employed | An employee | Prefer not to say

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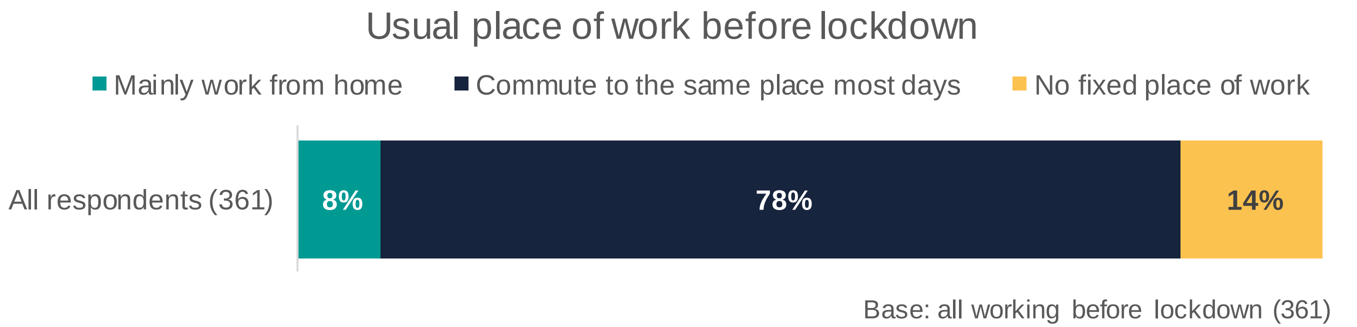
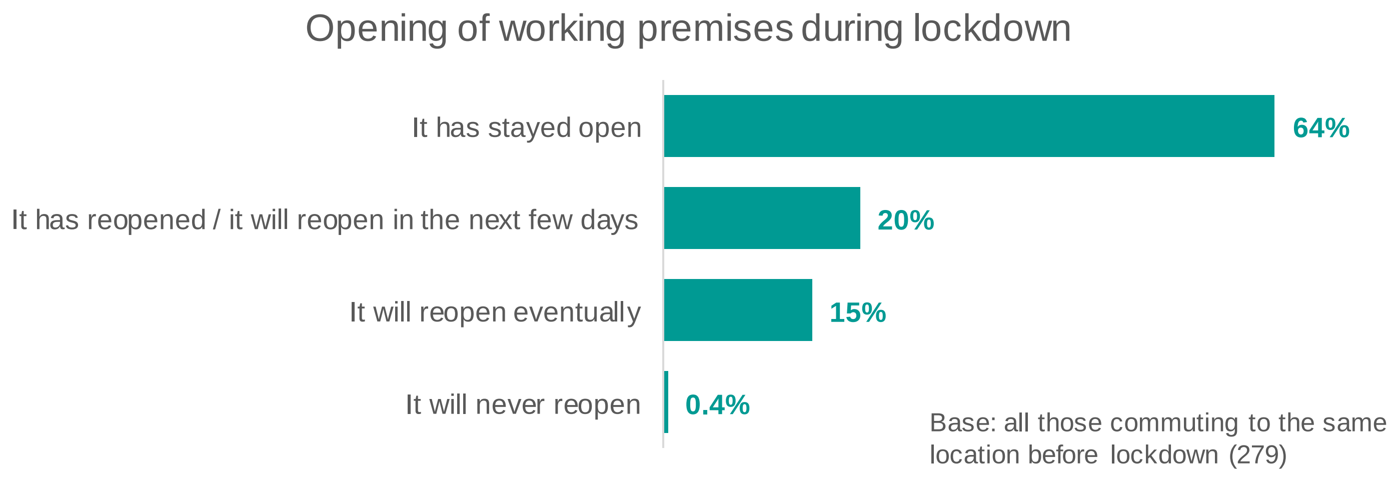
Impact of lockdown on working premises

78% of respondents commuted to the same place most days before lockdown; of these, 84% indicated that their working premises are already open or will do so in the next few days (maybe with restrictions in the number of people allowed in); 15% expect their working premises to open in the longer term, and just 0.4% of respondents say their work place will not reopen.





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

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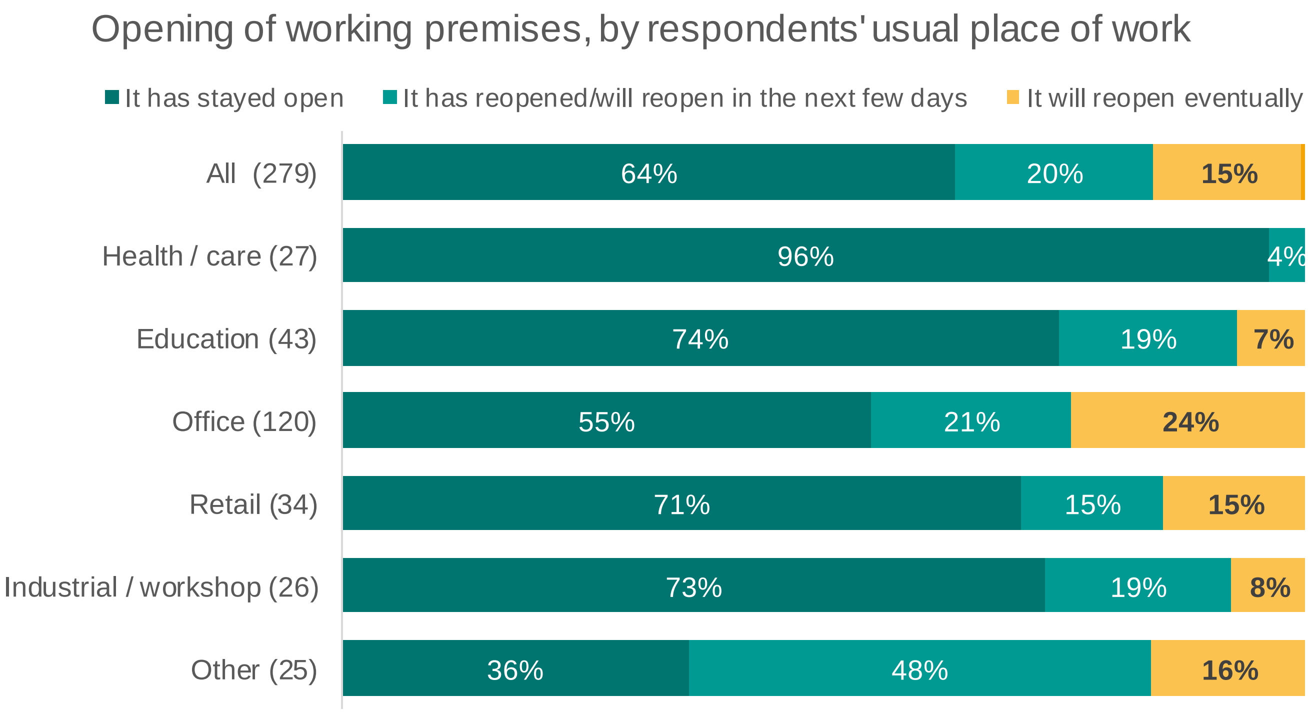
Impact of lockdown on working premises, by sector

92% of respondents in the industry sector and 93% in the education sector said their workplace was already open or would be open soon. Those working in retail seem to have also experienced a substantial return to activity, with 85% stating their premises are currently open or will open soon. Respondents working in office environments anticipate a slower return to their usual workplace, with 24% not expecting to see their usual workplace open in the short term (down from 32% in the first wave).



Q: What was your main commuting 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

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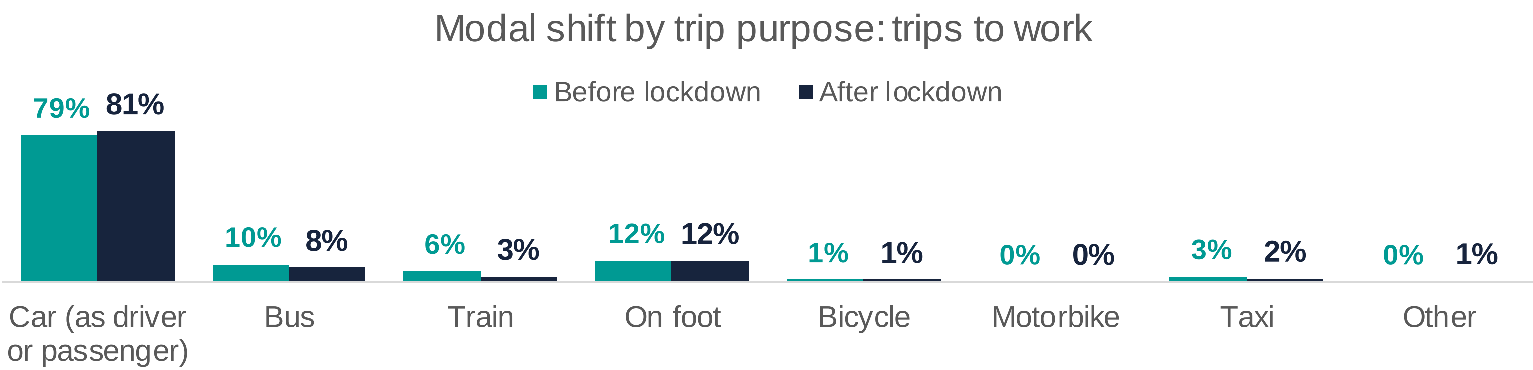
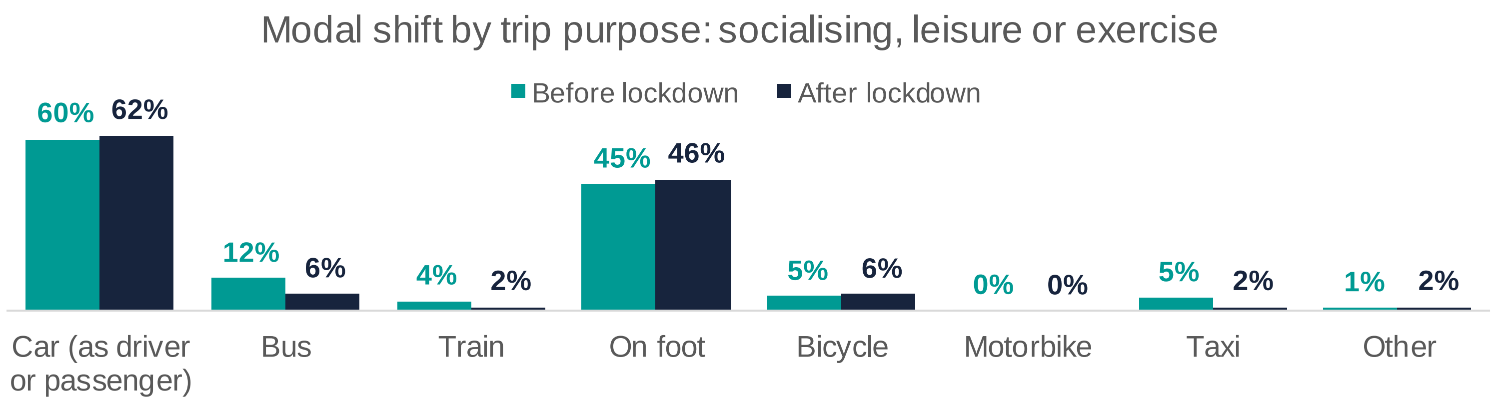
Impact on travel behaviour

Mode shift: work / socialising and leisure

Comparison of mode choice from before lockdown to intentions over the coming weeks suggests some avoidance of public transport for trips to work, although this is not a *significant* change. For socialising, leisure or exercise trips, mode preference moves *significantly* away from bus and non-*significantly* from train, towards active modes and car use.





Q: Before 'lockdown' what was the main type of transport you used when making journeys for the following reasons: work (351) | socialising, leisure or exercise (630)
Q: Over the coming weeks what is the main type of transport you think you will use when making journeys for the following reasons: work (295) | socialising, leisure and exercise (602)

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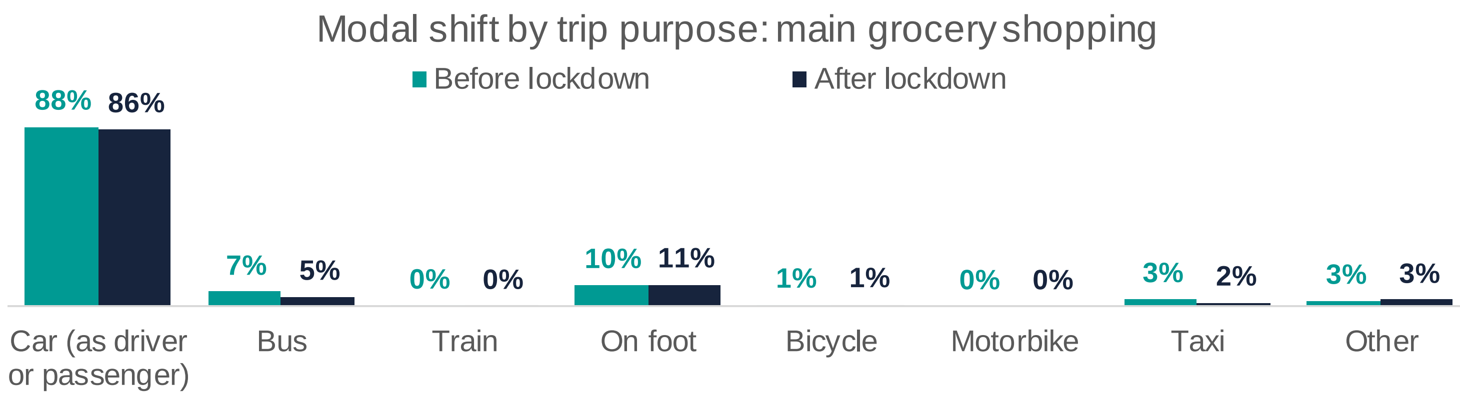
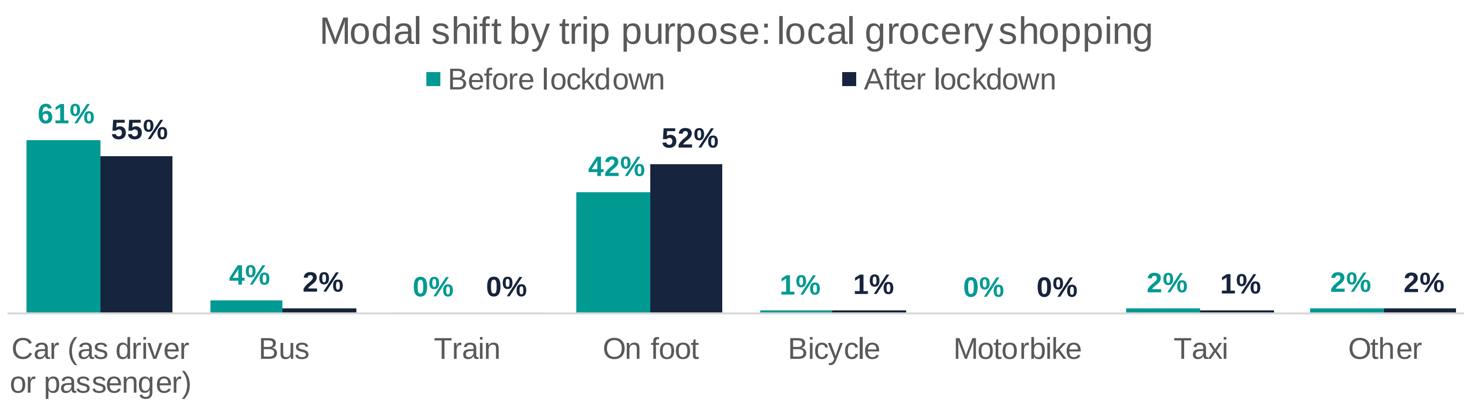
Mode shift: grocery shopping

Intentions for mode of travel for main grocery shopping over the coming weeks move away from motorised modes. For local grocery shopping, intentions move away from motorised modes with a *significant* increase in walking.





Q: Before 'lockdown' what was the main type of transport you used when making journeys for the following reasons: main/local grocery shopping (638 main / 635 local) Q: Over the coming weeks what is the main type of transport you think you will use when making journeys for the following reasons: main/local grocery shopping (609 main / 608 local)

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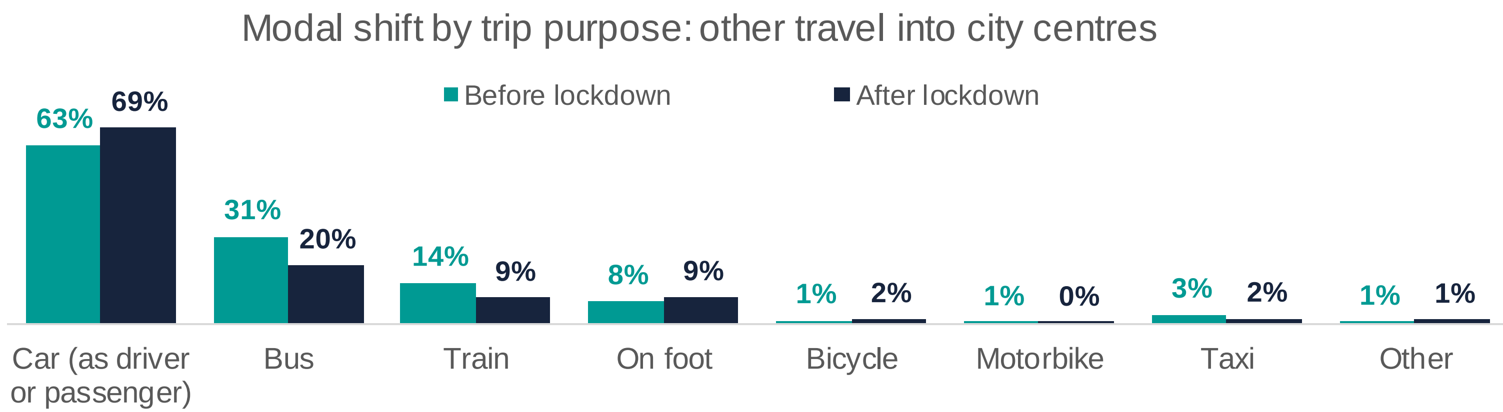
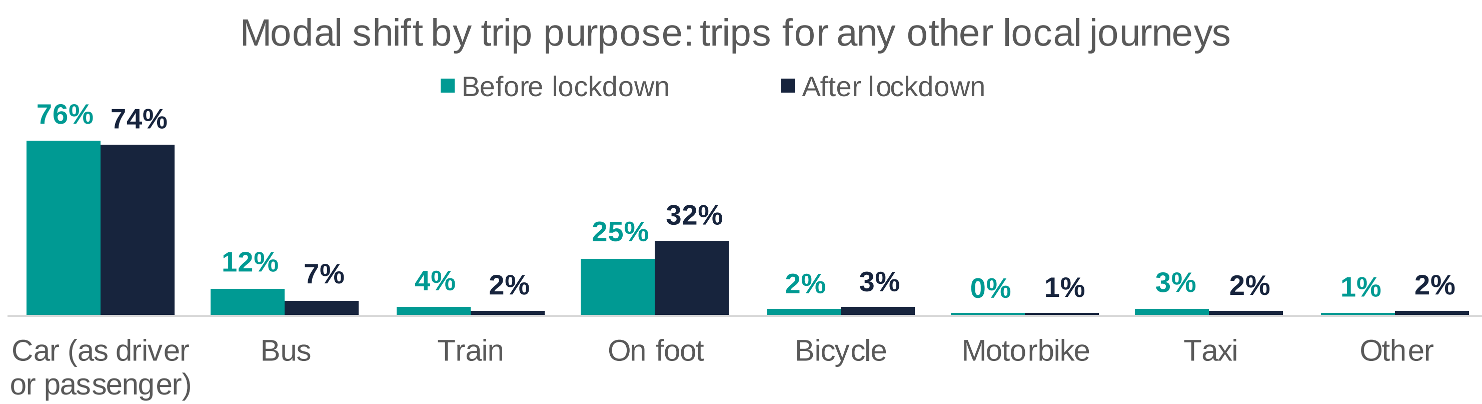
Mode shift: other local trips

Modal choice for other travel into city centres over the coming weeks shifts towards car and *significantly* moves away from bus, non-*significantly* from train. For other local journeys, intentions move *significantly* away from bus with non-*significant* decreases in car use and train use, towards active modes.





Q: Before 'lockdown' what was the main type of transport you used when making journeys for the following reasons: Other travel into city centres/Other local journeys (557/550) Q: Over the coming weeks what is the main type of transport you think you will use when making journeys for the following reasons: Other travel into city centres/Other local journeys (494/557)

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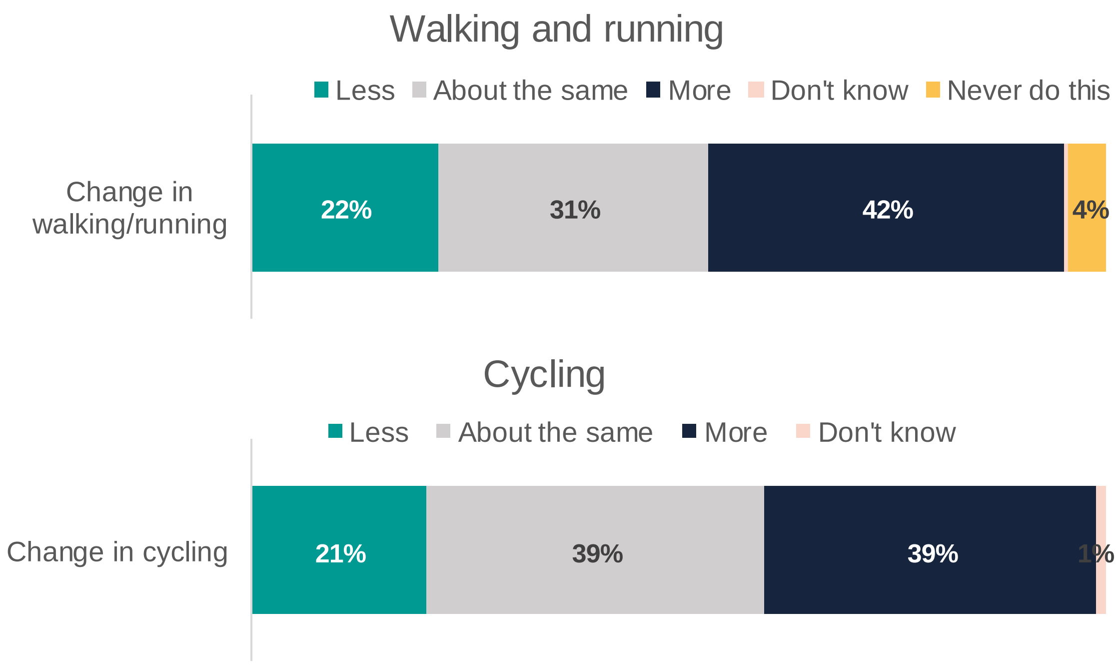
Walking and cycling

Change in walking/running and cycling

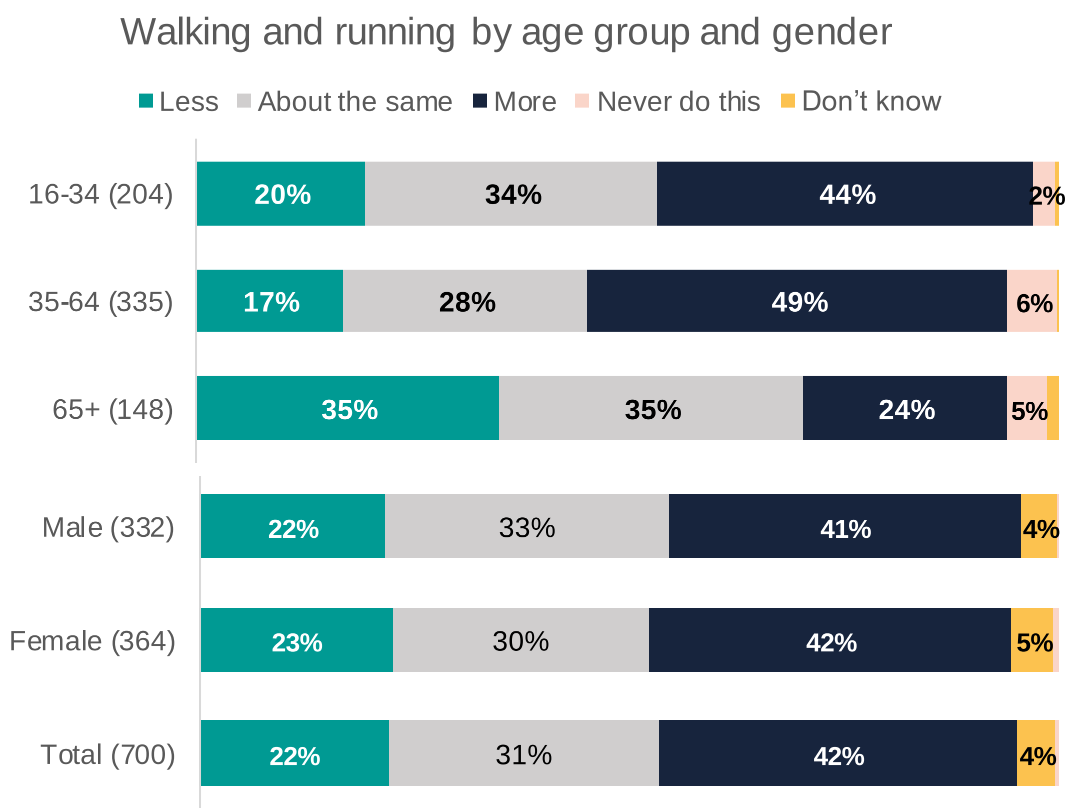
42% of respondents are walking or running more than before lockdown, and 39% cycling more.



Q: Are you walking/running any more or any less than you did before the lockdown? (700)
Q: Are you cycling any more or any less than you did before the lockdown? (180)

Change in walking/running

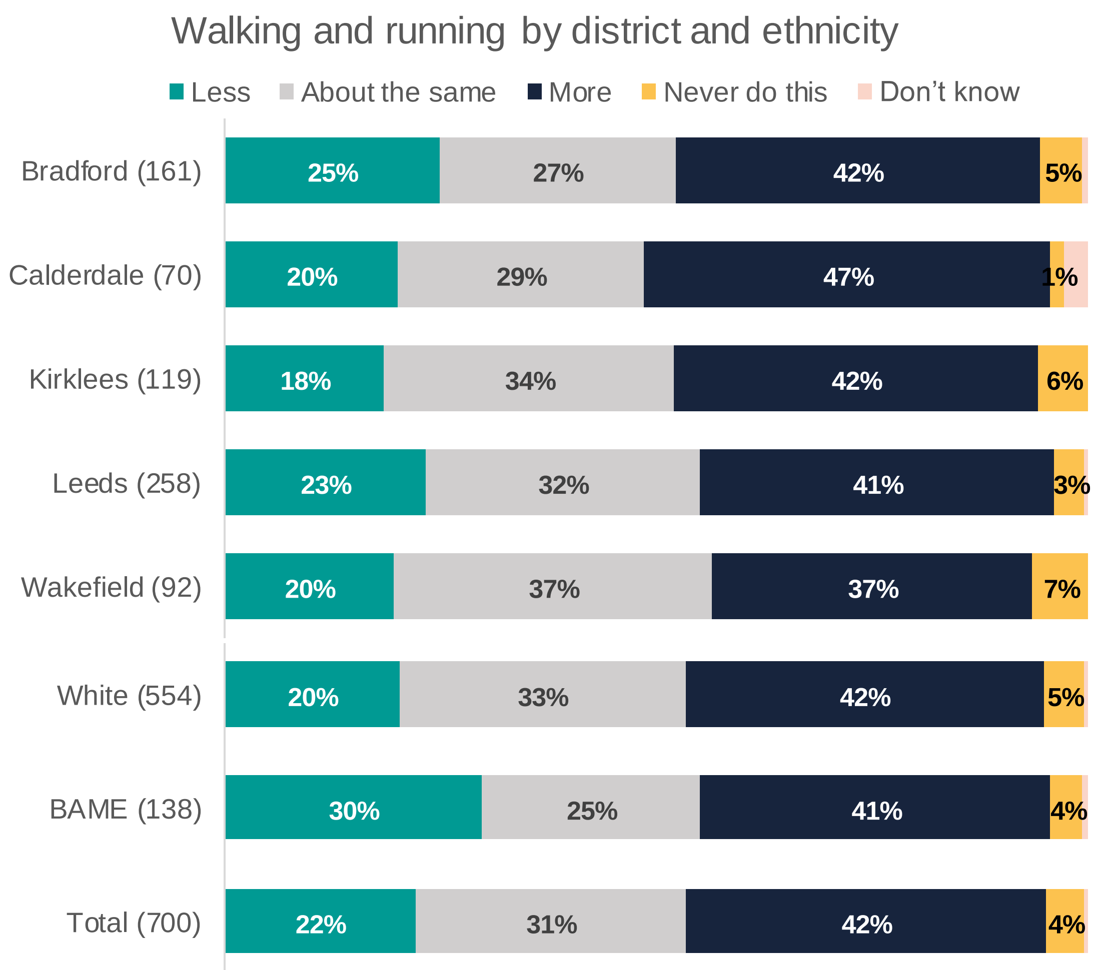
Significantly fewer respondents in the over 65 age group indicated that they were walking or running more, with 35-64 respondents being the most likely to be walking or running more.



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

Change in walking/running

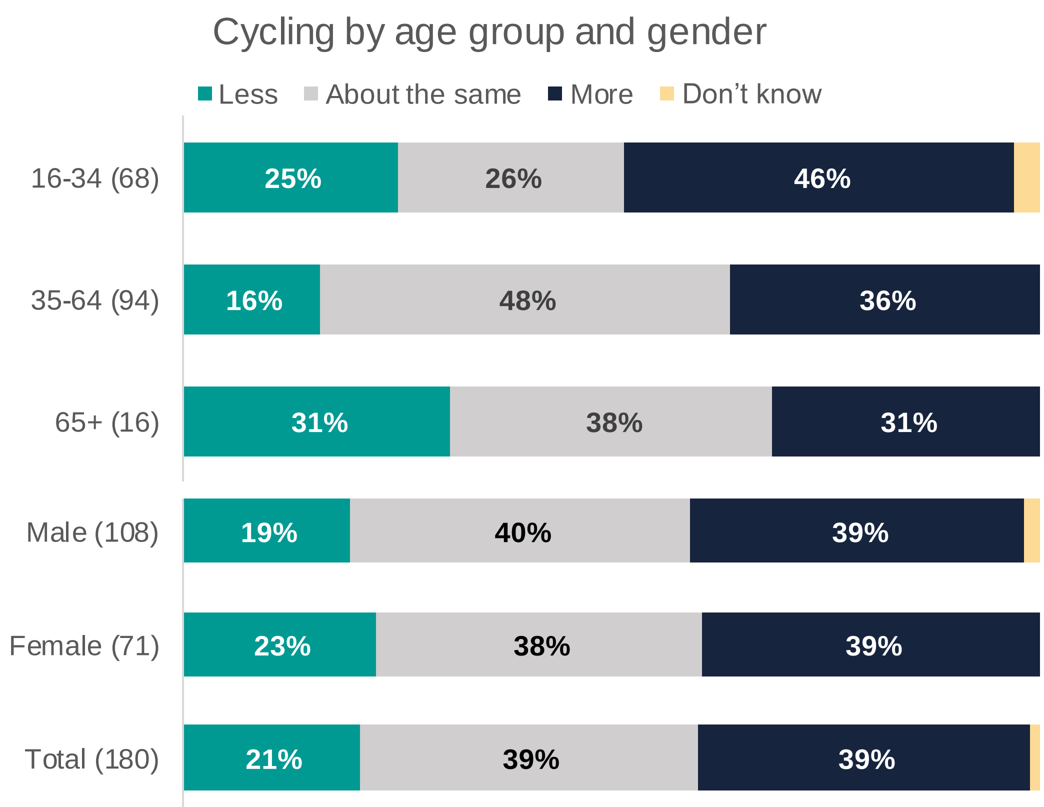
More respondents in the BAME group reported walking and running less (non-*significant*).



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

Change in cycling

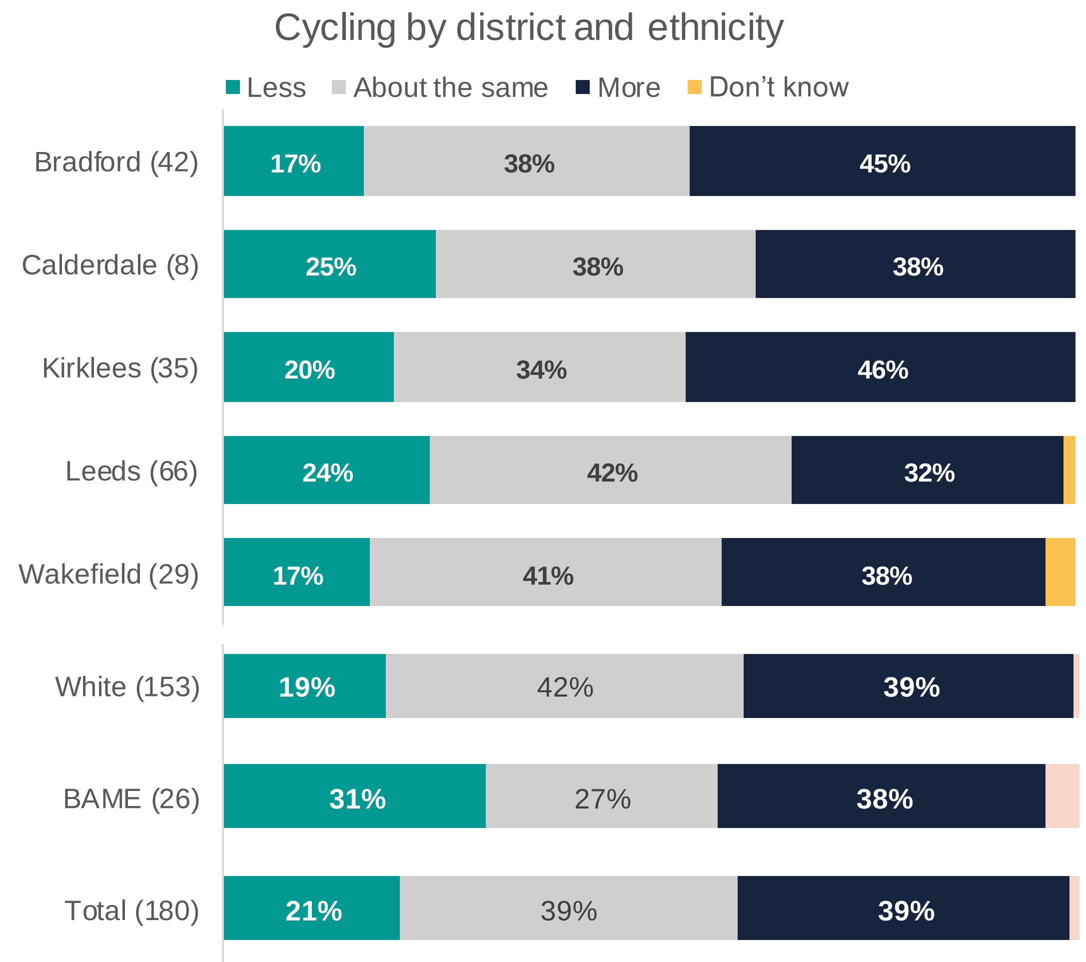
The lockdown appears to have caused different impacts across age bands rather than gender; however no *significant* differences can be reported due to the relatively small sample sizes.



Q: Are you cycling any more or any less than you did before the lockdown? (180)

Change in cycling

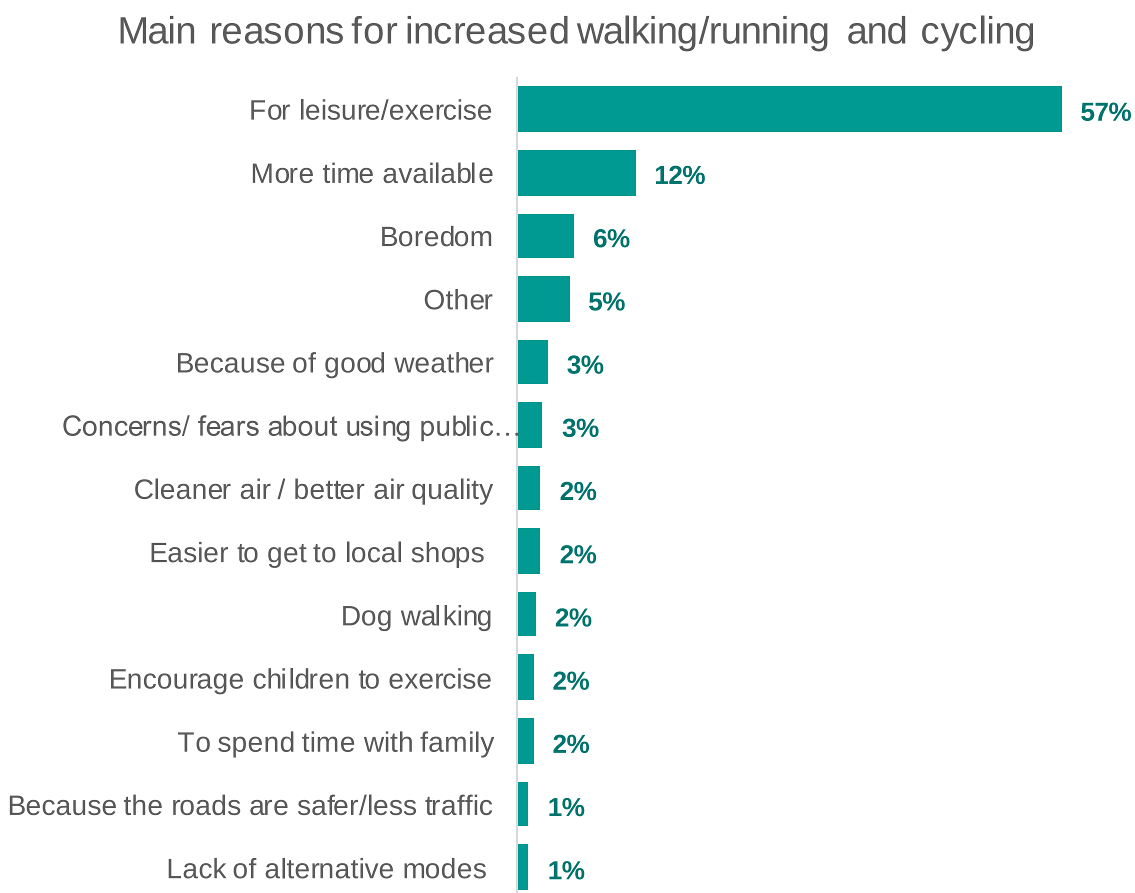
Overall, a higher proportion of respondents report cycling more, rather than less, than before the lockdown, across districts and ethnic backgrounds; however, the significance of this change cannot be determined, due to the relatively small size of the samples.



Q: Are you cycling any more or any less than you did before the lockdown? (180)

Reasons for increased walking and cycling

The main reasons mentioned for increased walking, running and cycling are for leisure and exercise (57%), having more free time (12%) or to combat boredom (6%); 3% mention concerns about using public transport.



Q: What would you say are the main reasons that you are walking / cycling more? (318)

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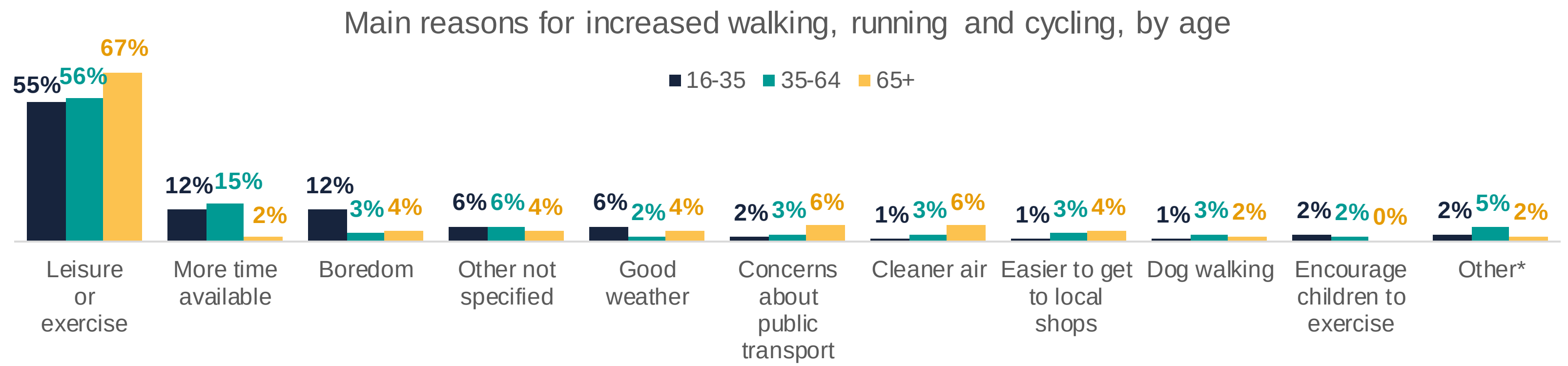
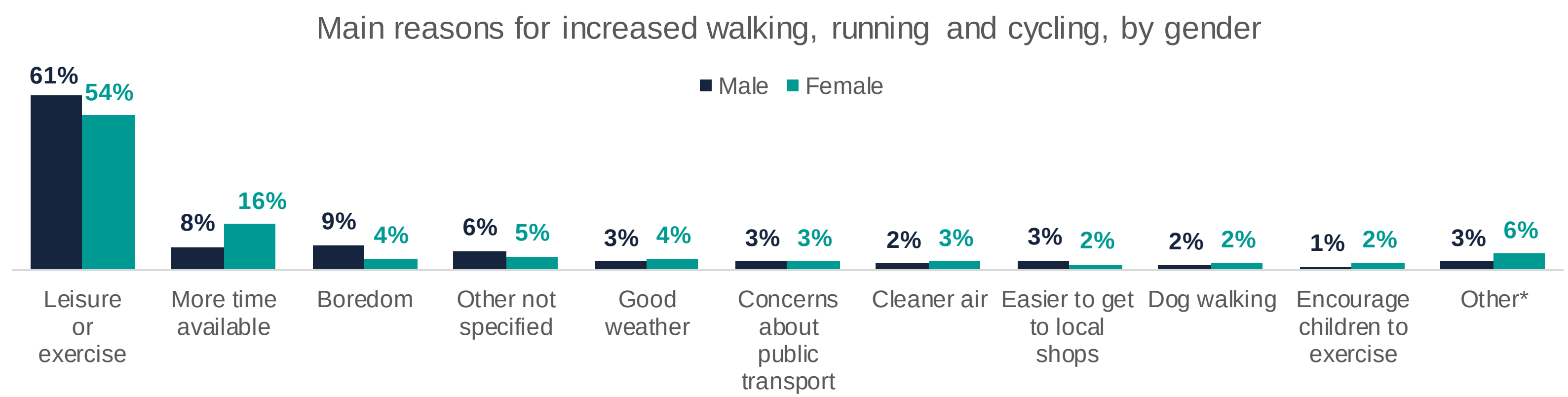
Main reasons for increased active travel by age group and gender

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



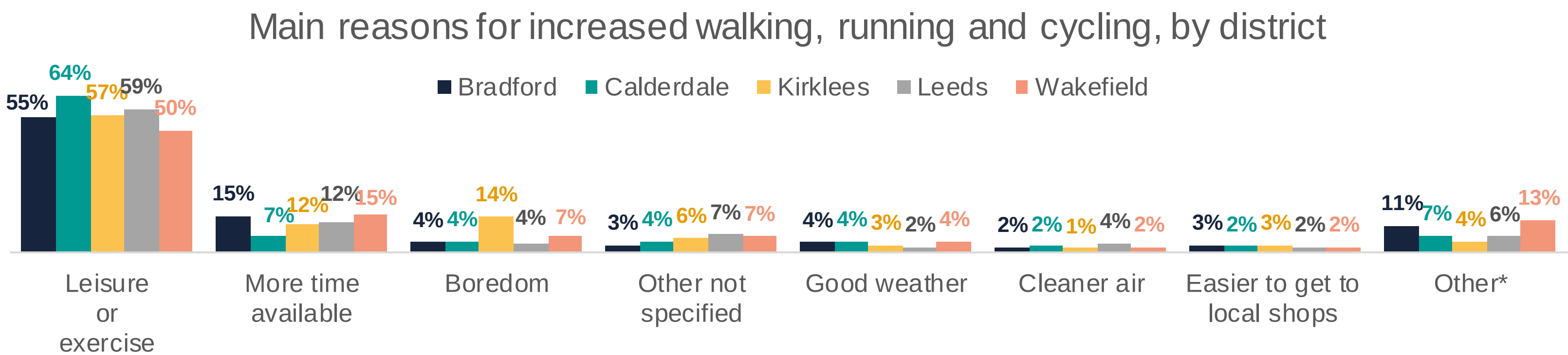
* Includes: spend time with family (16-35: 1%; 35-64: 3%); safer roads/less traffic (16-35: 1%; 35-64: 2%); lack of alternate modes (16-35: 1%; 35-64: 1%; 65+: 2%)



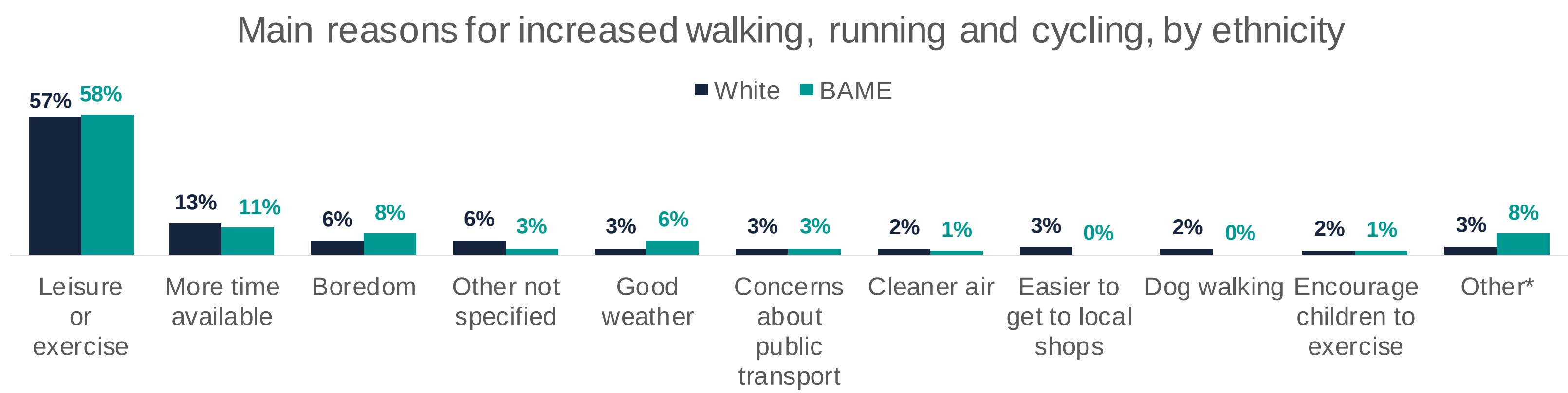
* Includes: spend time with family (M: 1%; F: 3%); safer roads/less traffic (M: 1%; F: 1%); lack of alternate modes (M: 1%; F: 1%)

Main reasons for increased active travel by district and ethnic background

Fewer Wakefield respondents mentioned leisure/exercise as the main motivation for increased active travel. Both ethnicity categories ranked leisure and exercise similarly.



* Includes: dog walking (B: 2%; K: 1%; L: 2%; W: 4%); encourage children to exercise (B: 2%; C: 2%; L: 1%; W: 4%); spend time with family (B: 6%;

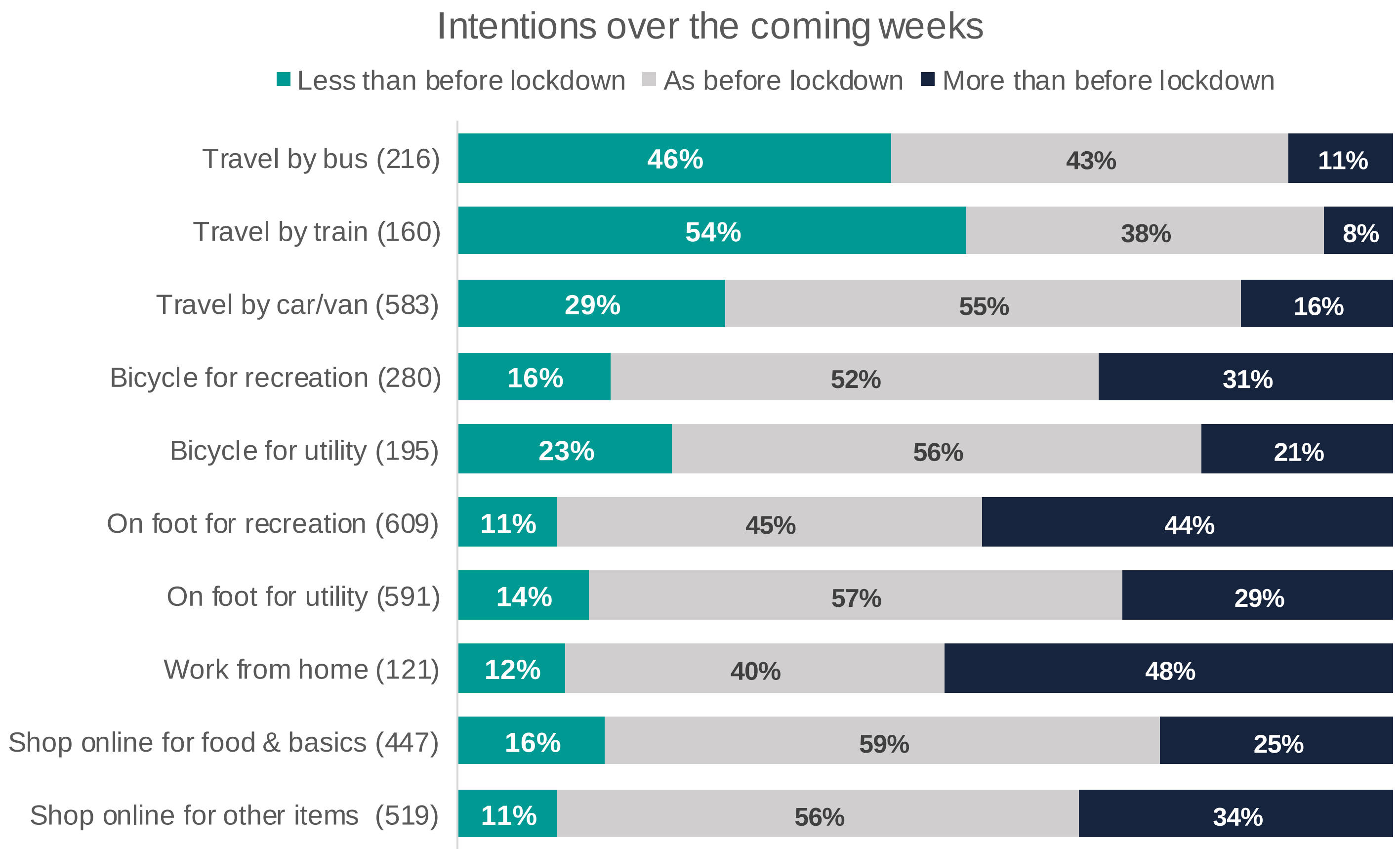


* Includes: spend time with family (W: 2%; B: 3%); safer roads/less traffic (W: 1%; B: 3%); lack of alternate modes (W: 1%; B: 3%)

Future habits

Changes in travel activity

46% of respondents state they will travel by bus less in the coming weeks than before lockdown, and 54% will travel by train less; 29% will walk more for utility purposes, and 44% will also walk more for recreation in the near future. Almost half of respondents (48%) say they will work from home more in the near future than before the lockdown.



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

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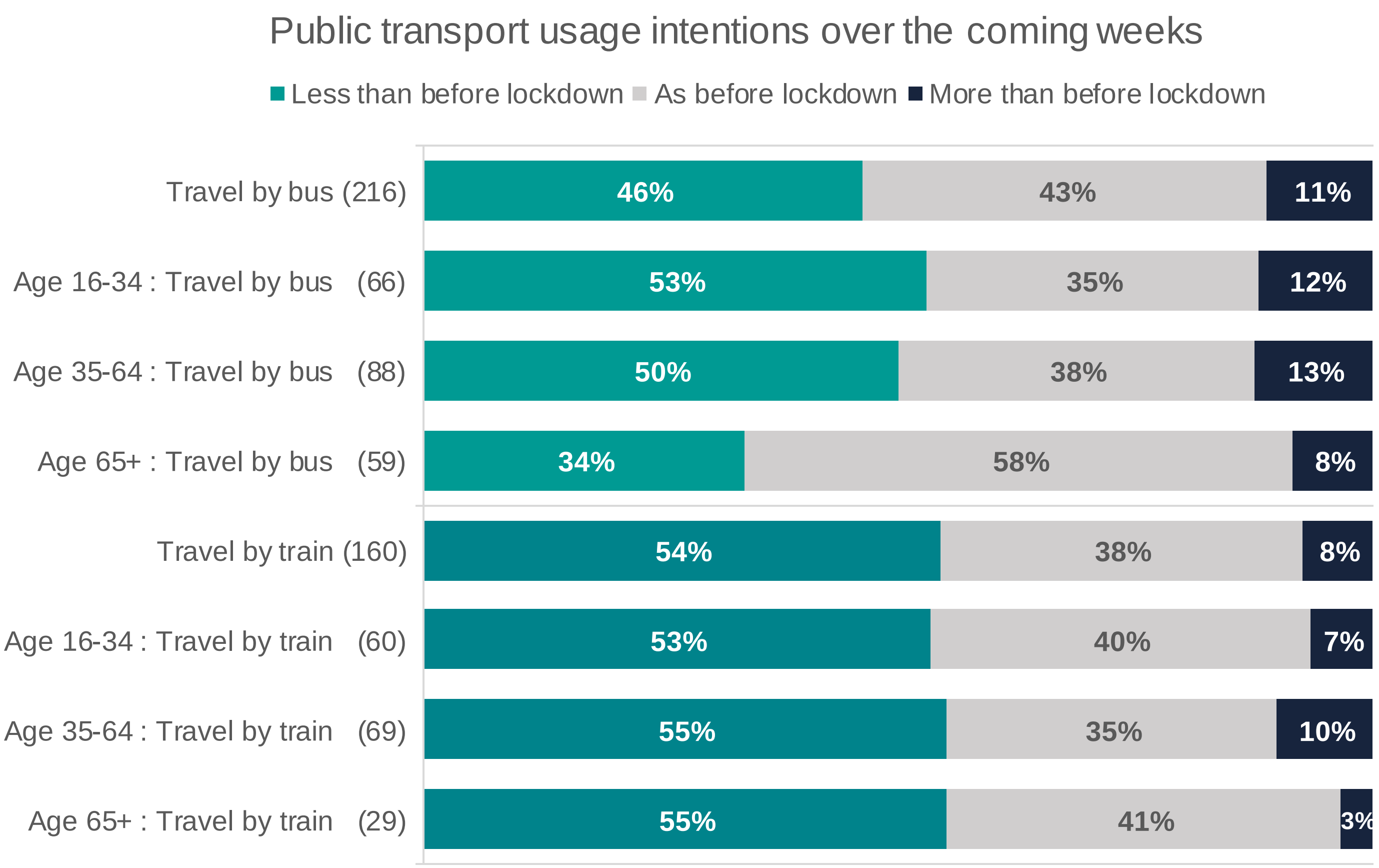
Public transport usage intentions by age

A *significantly* greater proportion of respondents say they will travel by bus and train less in the near future than before lockdown, compared with people who say they will use them more. This is true for both modes and across all ages in this wave.



Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before the lockdown started?
Base (in brackets): Public transport user at least once a month before lockdown, excluding 'not applicable' responses for the specific mode.

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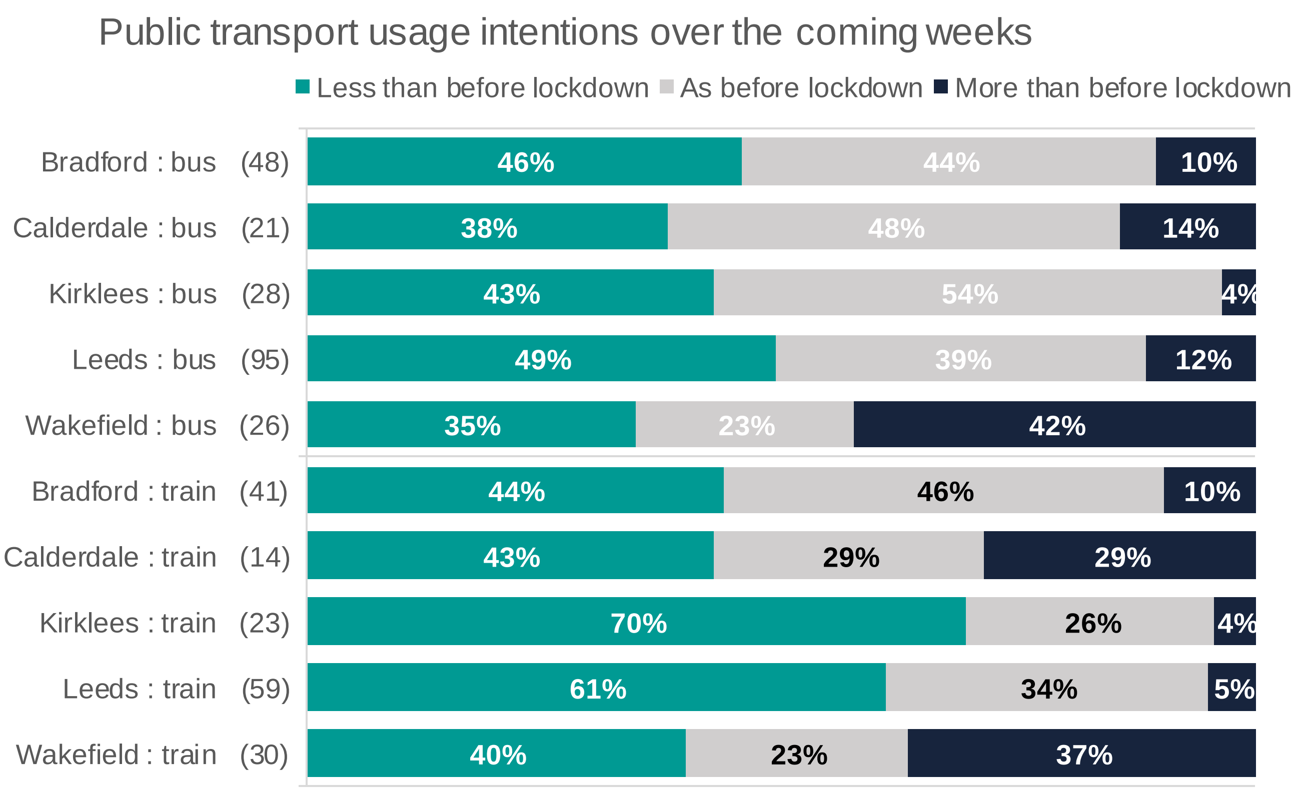
Public transport usage intentions by district

Compared to before lockdown, respondents in Wakefield are *significantly* more likely to increase their bus usage than respondents in Bradford, Kirklees, and Leeds; however, there is not a *significant* difference in the number of Wakefield residents intending to use bus more (42%) and those intending to do so less (35%) in the coming weeks. There was not a *significant* difference across districts in the proportion of respondents intending to use public transport less than before lockdown, either.



Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before the lockdown started?
Base (in brackets): Public transport user at least once a month before lockdown, excluding 'not applicable' responses for the specific mode.

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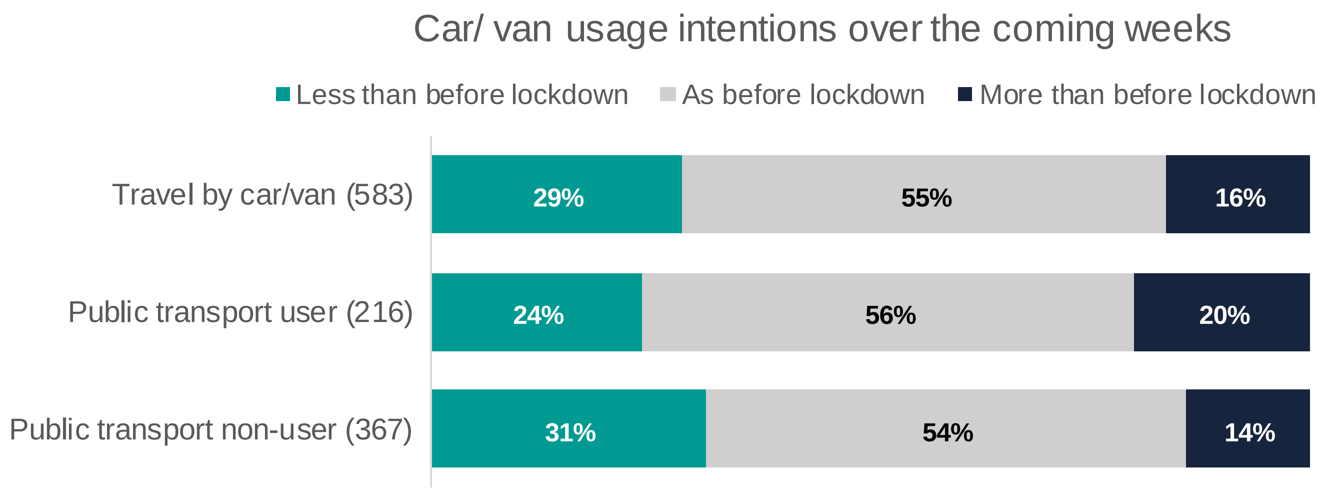
Private car / van usage intentions

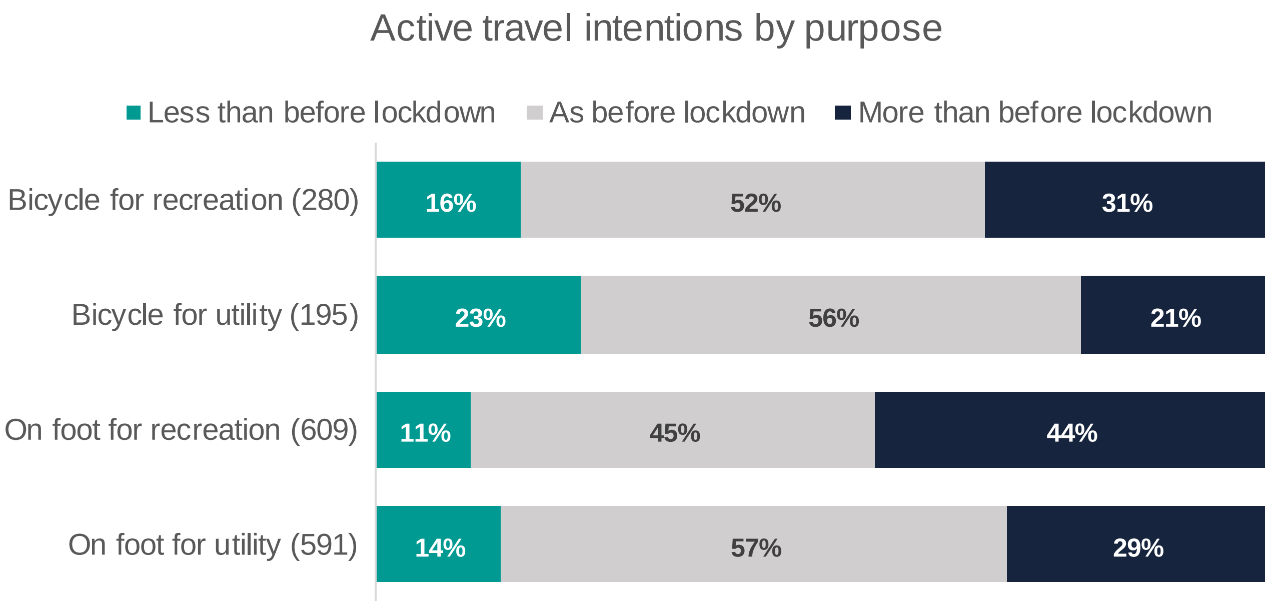
29% of respondents expect to travel by private car less in the near future than they used to before lockdown and 16% say they will do so more. Reflecting the shift away from public transport reported earlier, *significantly* fewer public transport users (24%) say they expect to reduce their car/van usage, compared with public transport non-users (31%).



Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before the lockdown started?
Base (in brackets)

Active travel intentions

A *significantly* greater proportion of respondents say they will cycle more for recreation purposes than before lockdown (31%, compared with 16% who say they will do so less). Likewise, a *significantly* greater number of respondents say they will increase, rather than reduce, their amount of walking, compared to pre-lockdown. This is true both for utility purposes and recreation.



Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before the lockdown started?
Bicycle | Walk / run | Leisure/exercise | To get somewhere

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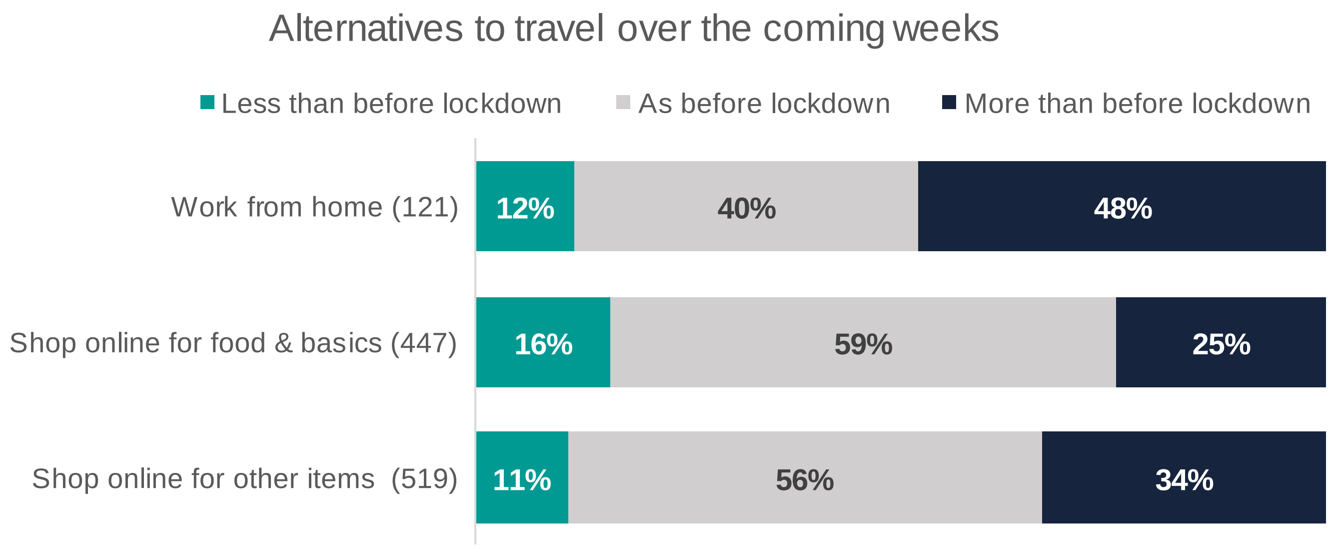
Alternatives to travel

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.

People in the 65+ age group reported a *significantly* lower level of intent to shop online more for other items compared to other age groups.



Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before the lockdown started?

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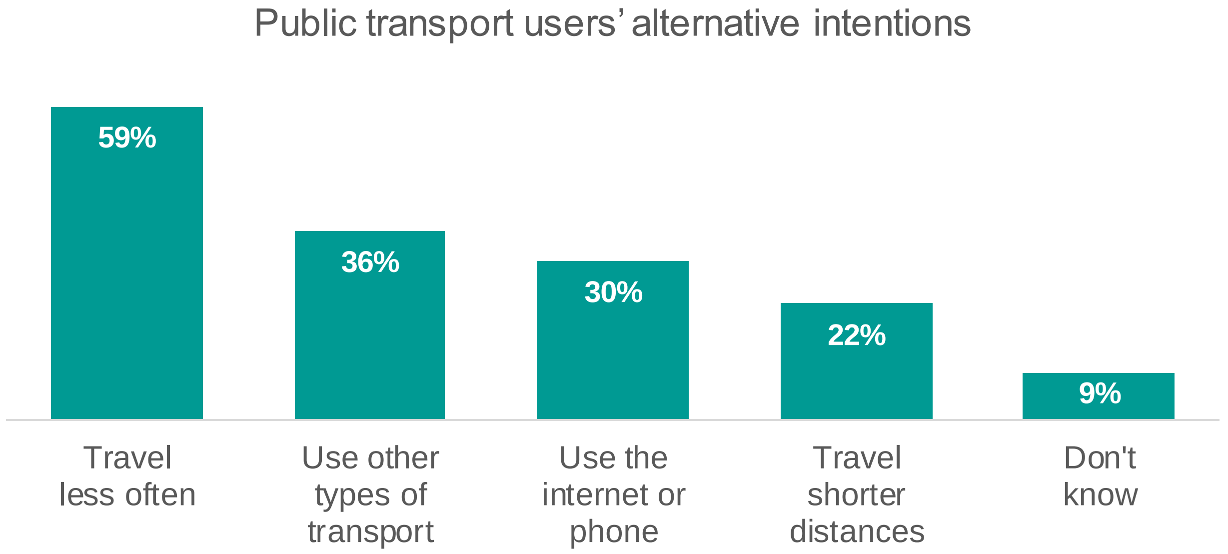
Alternatives to public transport

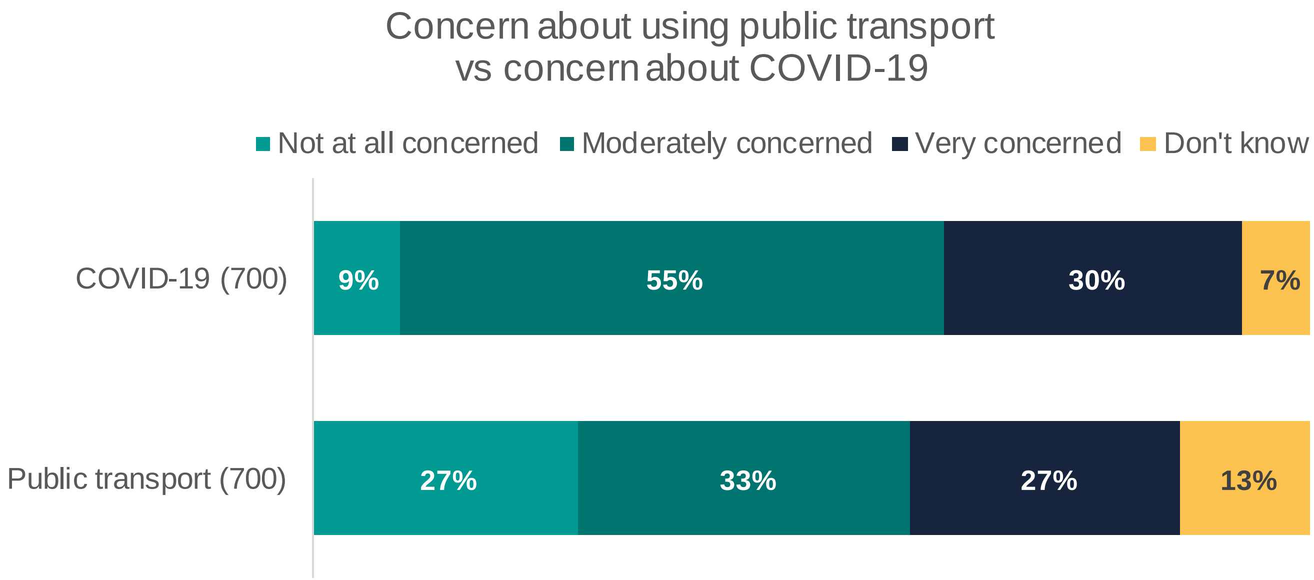
A *significantly* higher proportion (59%) of public transport users who said they would travel by bus or rail less in the coming weeks state they will stay at home more instead.



Q: You have said that you intend to use public transport less, which of these do you intend to do instead? (Multiple options)
Base = 192

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?
Q: How frequently did you travel by public transport before lockdown?
Q: Over the coming weeks what is the main type of transport you think you will use when making journeys for the following reasons …?

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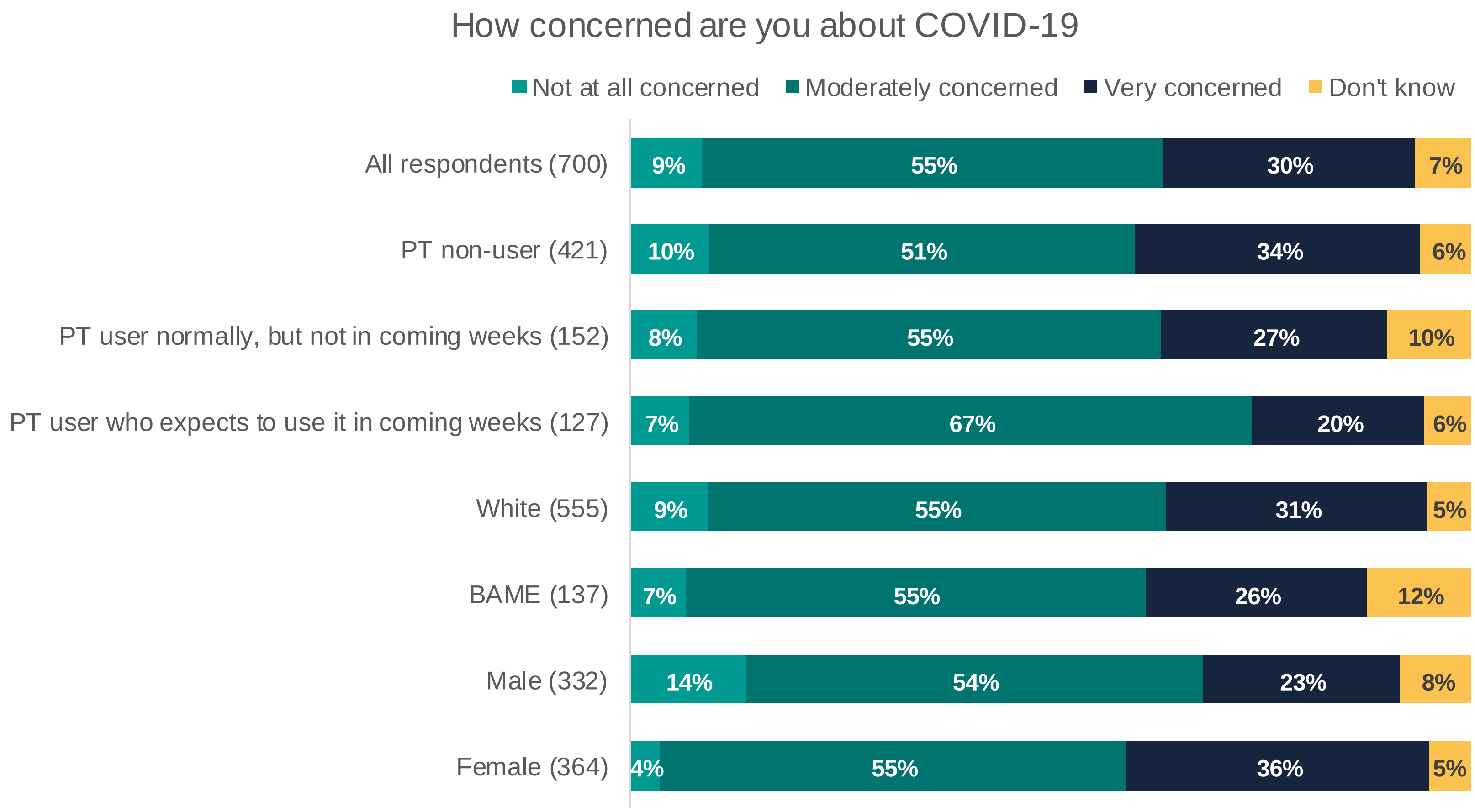
Concerns about COVID-19

When asked about concerns about COVID-19, the most common response was moderately concerned. 36% of female respondents said they were very concerned, compared to 23% of males.



Q: How concerned are you about COVID-19?
Q: How frequently did you travel by public transport before lockdown?
Q: Over the coming weeks what is the main type of transport you think you will use when making journeys for the following reasons …?

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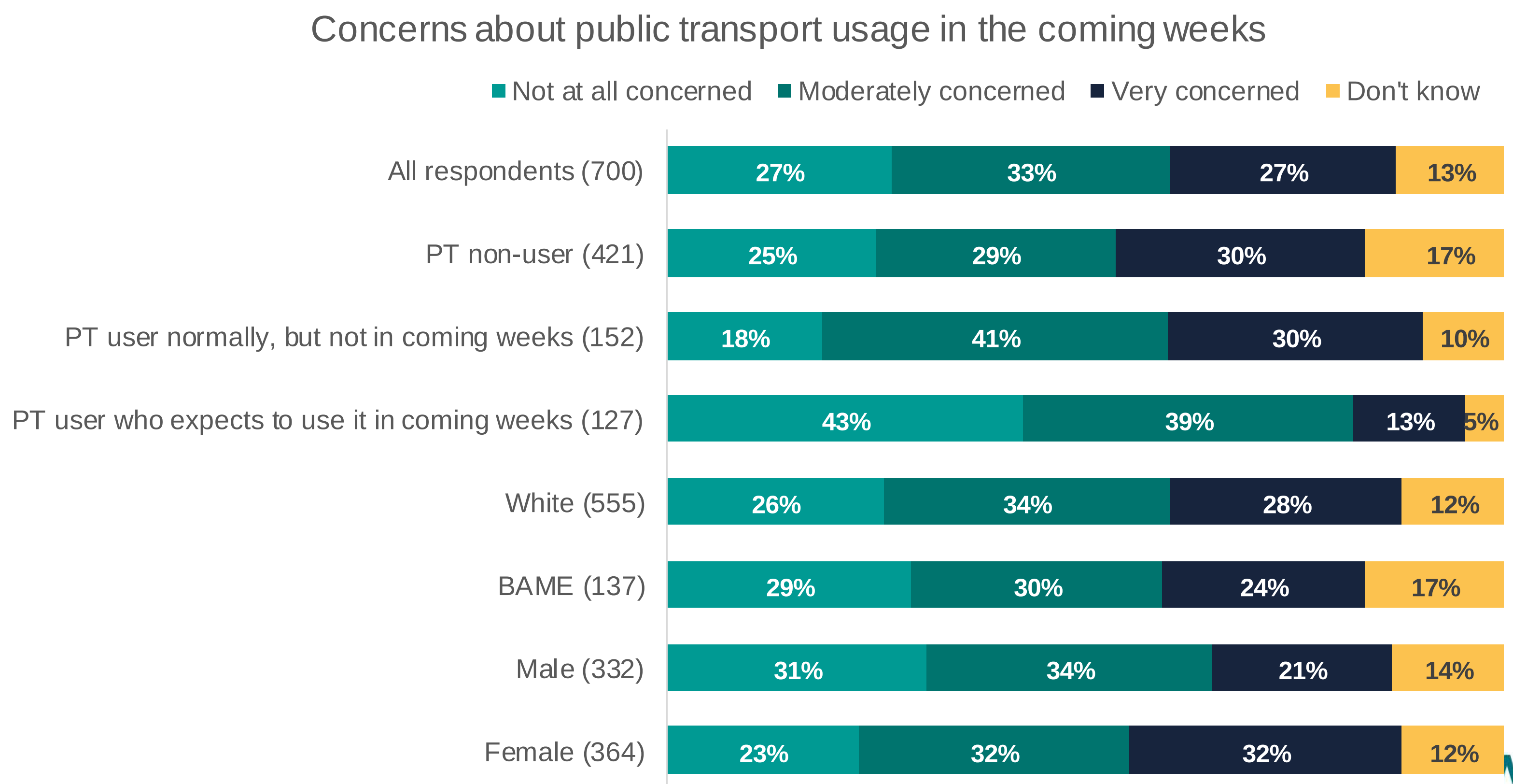
Concerns about public transport usage

Respondents who declared their intention to use buses or trains in the near future are *significantly* less concerned about using public transport than those who will not be using it in the coming weeks and than non-users.

Significantly more women stated that they are concerned about public transport usage, with more females stating they are ‘very concerned’ than men.



Q: Would you be concerned about using public transport over the coming weeks? Q: How frequently did you travel by public transport before lockdown? Q: Over the coming weeks, what is the main type of transport you will use when making journeys for the following reasons …?

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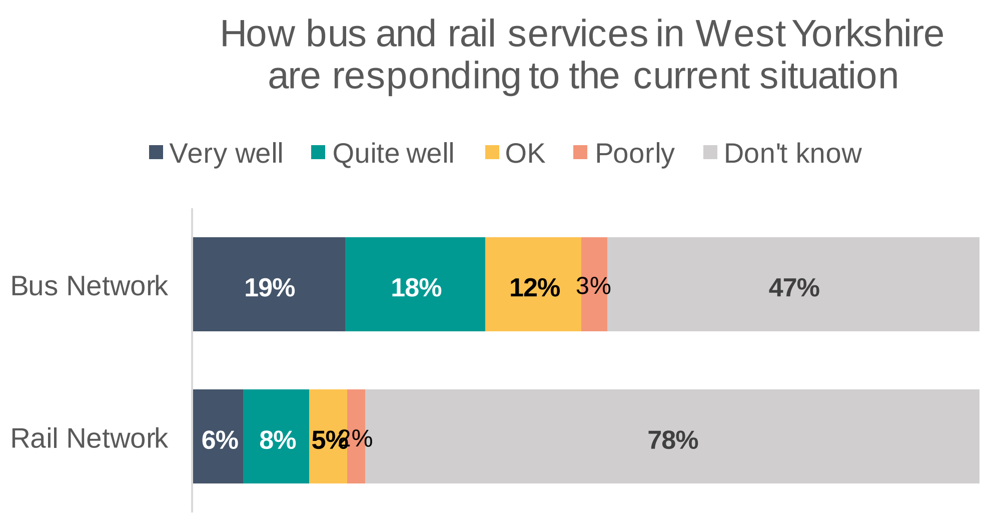
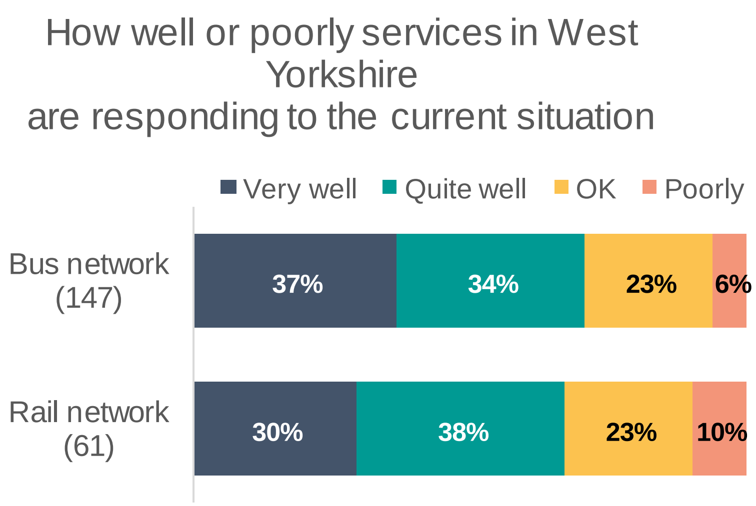
Users' opinions on public transport management

Most **public transport users** interviewed do not have an opinion on how the bus and rail networks are being managed in the current situation. The main difference between bus and rail networks is the number of people who answered don't know. Ignoring those who said don't know, 71% said the bus network was being managed very well or quite well and 67% said the rail network was being managed very well or quite well. The base of respondents offering an opinion is too low to draw any significant conclusions.





Q: How well or poorly do you think these services in West Yorkshire are responding to the current situation?
Base: Public transport users (279)

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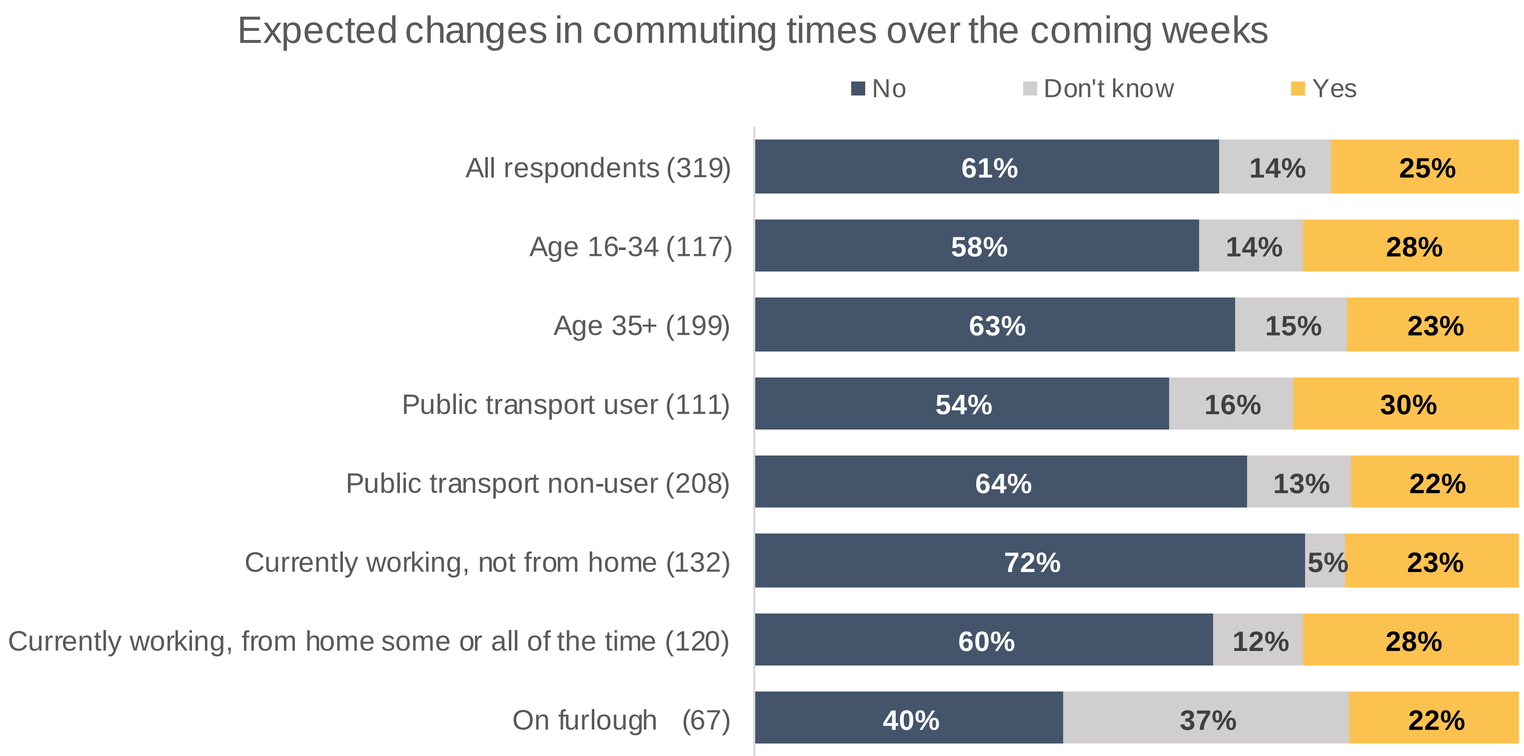
Change in commuting times

Most respondents are unlikely to change their commuting times. Public transport users appear more inclined to change their times than other commuters, although the difference was *not significant*. There appears to be some difference between respondents currently working from home and those who do not. Respondents on furlough were *significantly* more uncertain about their future commute behaviour compared to those currently working.



Q: Over the coming weeks do you think you will you travel to work at different times than you used to before the lockdown? Base 340 (Includes those currently working and those currently on furlough)

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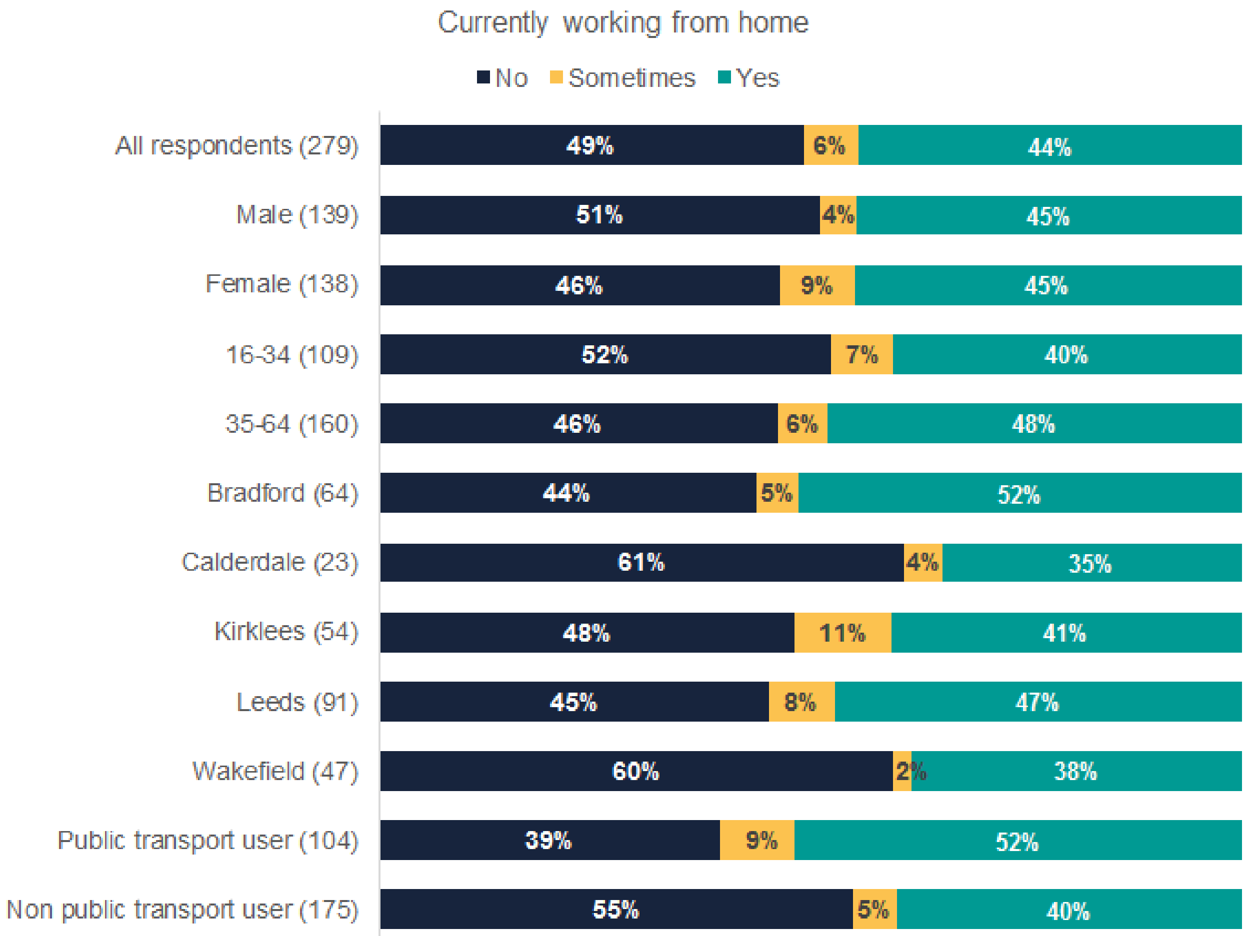
Home working

Currently working from home

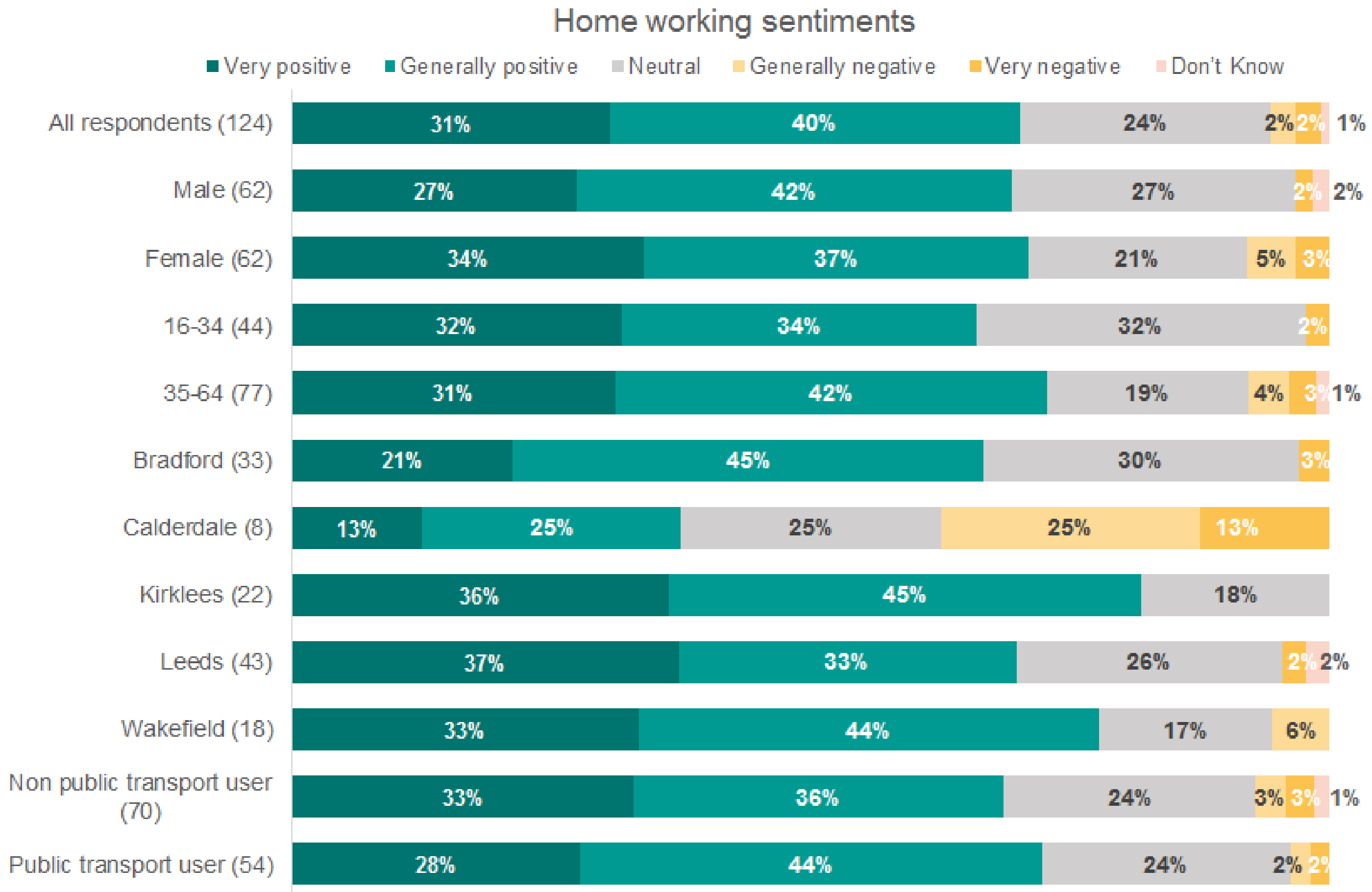
44% of respondents have been working at home during lockdown with no *significant* differences between gender, age and district. In line with wave 1 results, a greater proportion of regular public transport users said they have been working at home during lockdown (52%), compared to non-users (40%). There are no *significant* differences between waves 1 and 2.



Q. In the current situation are you working from home? Base = 279. Note % on charts are rounded.

Working from home sentiments

Overall, a *significantly* greater proportion of respondents found home working to be a positive experience (70%) compared to only 5% who thought this was a negative experience, in line with wave 1 results . Although there is some variation by age and district, the results are not *significantly* different. Note the small number of respondents for some categories.



Q. How do you feel about working from home at the moment? Base = 124. Note % on charts are rounded.

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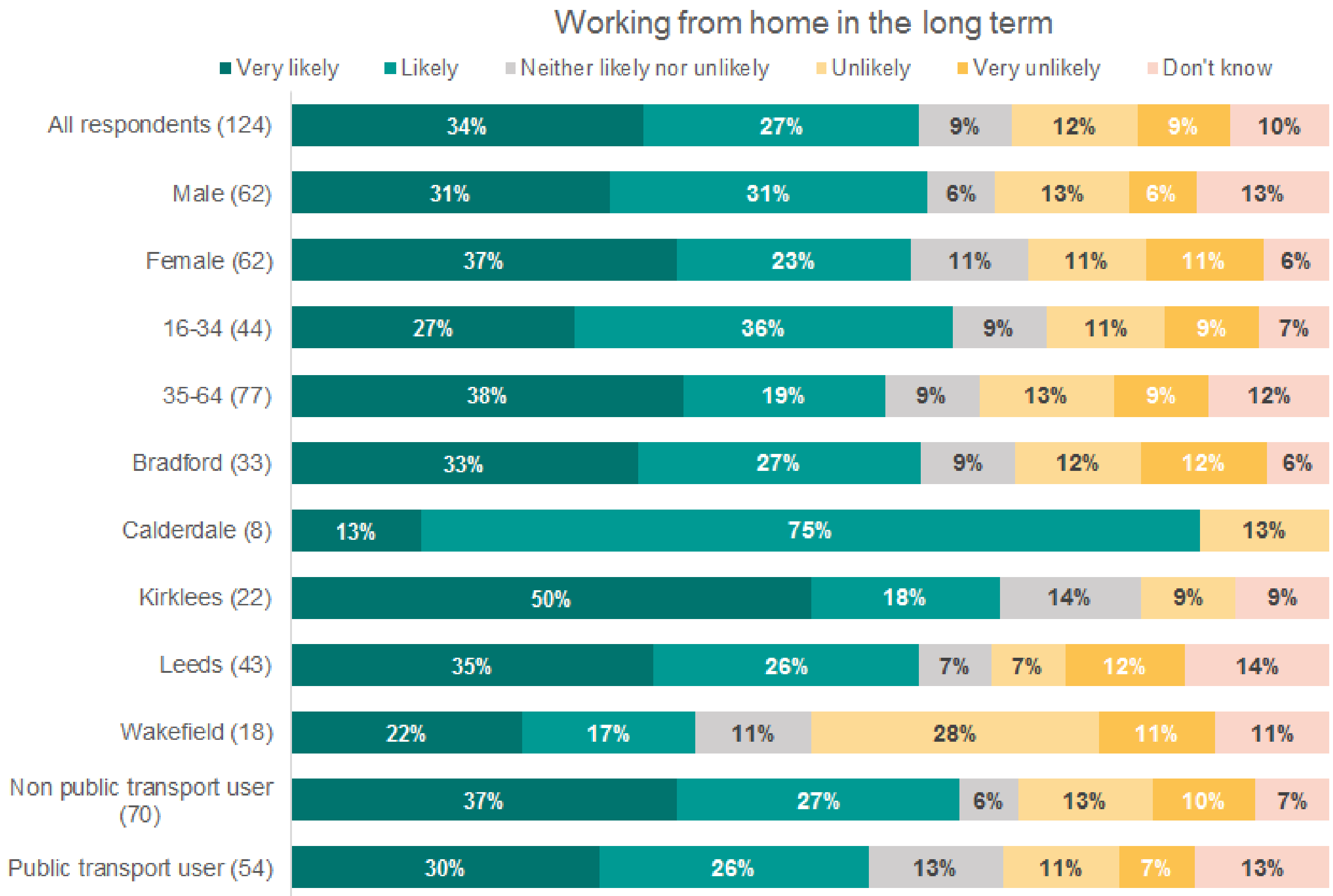
Working from home in the long term

A *significantly* greater proportion of respondents (60%), said that, in the long term, they are likely to work from home more often than before lockdown, compared to 21% who said that would be unlikely. Note the small number of respondents for some categories.



Q. In the long term, how likely are you to work from home more often than you did before the lockdown? Base = 124
Note % on charts are rounded.

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Respondents' demographic profile

Survey respondent demographics (I)

Age	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
16-34	204	29.1	32.4
35-64	335	47.9	46.8
65+	148	21.1	20.8
Prefer not to say	13	1.9	-
Total	**700**	**100.0**	**100.0**

ONS 2018 mid-year population estimates

Sex	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
Male	332	47.4	49.2
Female	364	52.0	50.8
Other	1	0.1	-
Prefer not to say	3	0.4	-
Total	**700**	**100.0**	**100**

ONS 2018 mid-year population estimates

District	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
Bradford	161	23.0	22.2
Calderdale	70	10.0	9.2
Kirklees	119	17.0	18.9
Leeds	258	36.9	34.5
Wakefield	92	13.1	15.1
Total	700	100.0	100.0

ONS 2018 mid-year population estimates

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)	554	79.1	81.8
Black, Asian Minority Ethnic (BAME)	132	18.9	17.3
Other ethnic group	6	-	0.9
Prefer not to say	8	1.1	-
Total	**700**	**100.0**	**100.0**

ONS 2011 Census

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Survey respondent demographics (II)

Working situation	Survey responses (count)	Survey responses (%)
On Furlough	75	10.7
Currently working	279	39.9
Neither	327	46.7
Prefer not to say	19	2.7
Total	**700**	**100.0**

Full/part time	Survey responses (count)	Survey responses (%)
Full Time (30+ hours per week)	239	67.5
Part Time (under 30 hours per week)	114	32.2
Prefer not to say	1	0.3
Total	**354**	**100.0**

Self-employed/ employee	Survey responses (count)	Survey responses (%)
Self-employed	53	15.0
An employee	301	85.0
Prefer not to say	0	0.0
Total	**354**	**100.0**

Employment and education status	Survey responses (count)	Survey responses (%)
Part time working or furloughed	109	15.6
Full-time working or furloughed	231	33.0
Wholly retired from work	186	26.6
Unemployed including laid off and redundant	38	5.4
Long term sick or disabled	22	3.1
Looking after house and family / full time carer	26	3.7
In full time education	8	1.1
In full time education and working	14	2.0
Other	43	6.1
Prefer not to say	23	3.3
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

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