COVID-19 Transport Survey

Telephone Survey Wave 5

Introduction

[The West Yorkshire Combined Authority](#) has conducted a telephone survey series which began in 2020 (5 waves to date) made up a representative sample of West Yorkshire residents to track attitudes and behaviours in relation to transport to understand COVID-19 recovery trends.

Fieldwork (wave 5): 7 – 18th June 2021

Sample: 1,000 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.

Report structure: Wave 1- 5 trends

Impacts on travel behaviour

Current walking and cycling

Future trends

Home working & future commuting demand

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 vs COVID-19 rates
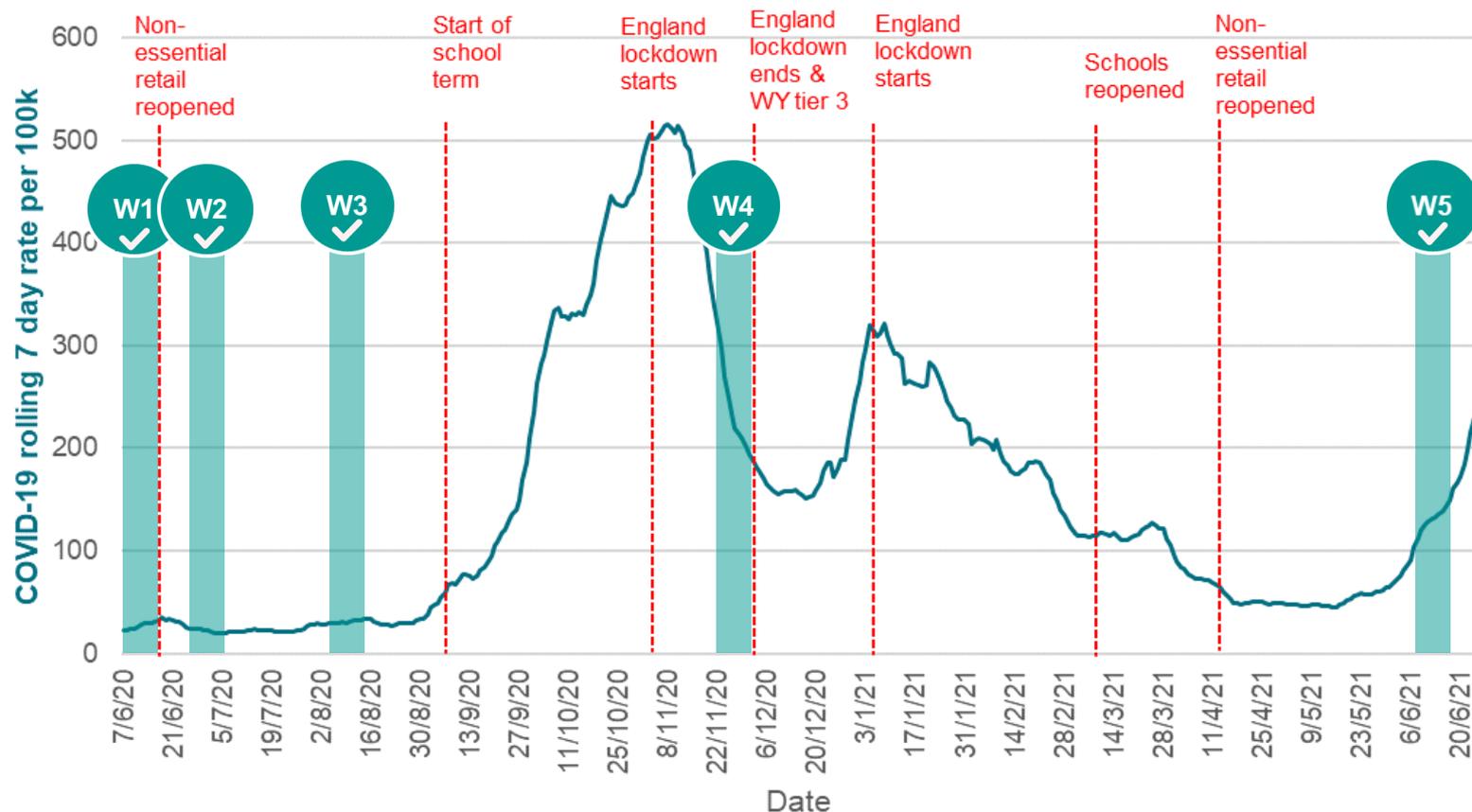
Wave 1 - before re-opening of non-essential retail on the 15th June.

Wave 2 - before pubs, bars, cafes, hairdressers and places of worship re-opened on the 4th of July.

Wave 3 - of the survey commenced on the 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.

Wave 4 - ahead of the second lockdown ending at the start of December 2020.

Wave 5 - ahead of all restrictions easing on 21st June (subsequently moved to 19th July).

Executive summary (I)

Changes in travel behaviour

- Wave 5 captures several changes in respondents' intended choice of mode by purpose. A decrease in car use for work in the coming weeks can be seen compared to wave 1, the first time this has decreased through these surveys. Walking for work in the coming weeks increases for the first time.

- Relative to results in wave 1, train use increases *significantly* for other travel into city centres, whilst car, public transport and taxi use increases *significantly* for social, leisure and exercise trips in the coming weeks.

- Public transport mode share in the coming weeks is likely to remain lower than pre-pandemic levels for all journey purposes.

- In contrast, growth in levels of walking is expected for all journey purposes in the coming weeks (vs pre-COVID-19), and bicycle mode share for social, leisure and exercise trips will as see a slight increase.

- Relative to pre-COVID-19, car mode share for work and other travel to city centres is expected in increase slightly whilst remaining below pre-pandemic levels for other journey purposes.

Executive summary (II)

Current walking and cycling

- 35% of respondents said they have been walking and running more than pre-COVID-19, whilst 18% said they have been doing less, an overall net gain.

- The most commonly cited reason for walking and running more was for leisure or exercise (39%), likewise for cycling (45%). Having more time available was the second most common response for both modes.

- 28% of respondents reported having ridden a bicycle in the past couple of years.

Future trends

- For travel by train and car, there are tentative signs of a transition back towards pre-pandemic usage; compared to survey results from last summer, a *significantly* greater proportion of respondents said they would use these 'the same' as before COVID-19.

- However, considerable differences in respondent's intentions (compared to pre-COVID-19) remain. 40% of respondents state they will travel by bus less in the coming weeks than before COVID, and 41% will travel by train less. Importantly, 28% said these changes would be permanent.

- COVID-19 related online shopping behaviours look set to continue. 28-35% expect to do more online shopping (food and other items) in the coming weeks, and most of these expect this to become a permanent change.

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Executive summary (III)

Future trends continued…

- Over time, concern about using public transport (in relation to COVID-19) has fallen *significantly*, although there are differences between age groups; those aged under 34 are 64% more likely than those aged over 65 to be 'not at all concerned' about using public transport.

- The results indicate that, on balance in the coming weeks, people are more likely to do remote activities more (work from home, shop online), use buses and trains less, and use active travel more (bicycle and on foot). Expected increases and decreases in car/van travel largely balance each other out.

- Reported increases in walking or running will be sustained in the coming weeks. Increased cycling for recreation (leisure and exercise) may be balanced out by decreased cycling for utility (to get somewhere), though the respondents who expect to cycle more in the coming weeks are more likely to make this a permanent change than those who expect to cycle less.

Home working and future commuting demand

- Before COVID-19, West Yorkshire residents worked from home 0.46 days a week on average. One fifth of respondents had worked from home at least occasionally before the pandemic, and rail commuters were *significantly* more likely to have done so.

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Executive summary (IV)

Home working and future commuting demand continued…

- 30% of respondents reported currently working from home, a *significant* reduction compared to in wave 1 of the survey in June 2020 (47%).

- Working from home sentiments remain positive; 72% of respondents reported a positive home-working experience, with the share of respondents reporting a 'very positive' experience increasing over time.

- There is sustained preference for more home working in the long term compared to pre-COVID-19; over three quarters of respondents said that, in the long term, they are likely to work from home more often than before COVID, with almost half stating this would be very likely.

- The results reveal on average, a 17% reduction in commuting trips in the long-term relative to pre-COVID-19, a drop that is *significantly* higher (29%) among rail commuters.

- There is expected to be a notable reduction in the 5 or more day a week commute in the long term, in parallel with an increase in the share of people expecting to do a 1-3 day commute.

- Although the majority of respondents within each band intend to stick to their previous commuting habits, for those who expect a change the 1-3 days a week is the most popular option.

- A third of those previously commuting 4+ days a week expect to reduce their amount of commuting (the most popular option being the 1-3 days a week commute).

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Wave 1 - Wave 5 Trends

W1-W5 trends: Modal choice by trip purpose (I)

There is a decrease in intent to travel to work by car over the coming weeks, paired with a rise in intentions to walk to work, and public transport recovers slightly compared to wave 4.

For other travel into city centres over the coming weeks, there is a *significantly* higher preference for train, an increase in bus and decrease in car use compared to previous waves.

Modal shift by trip purpose: trips to work over the coming weeks

Wave 1 ■ Wave 2 ■ Wave 3 ■ Wave 4 ■ Wave 5
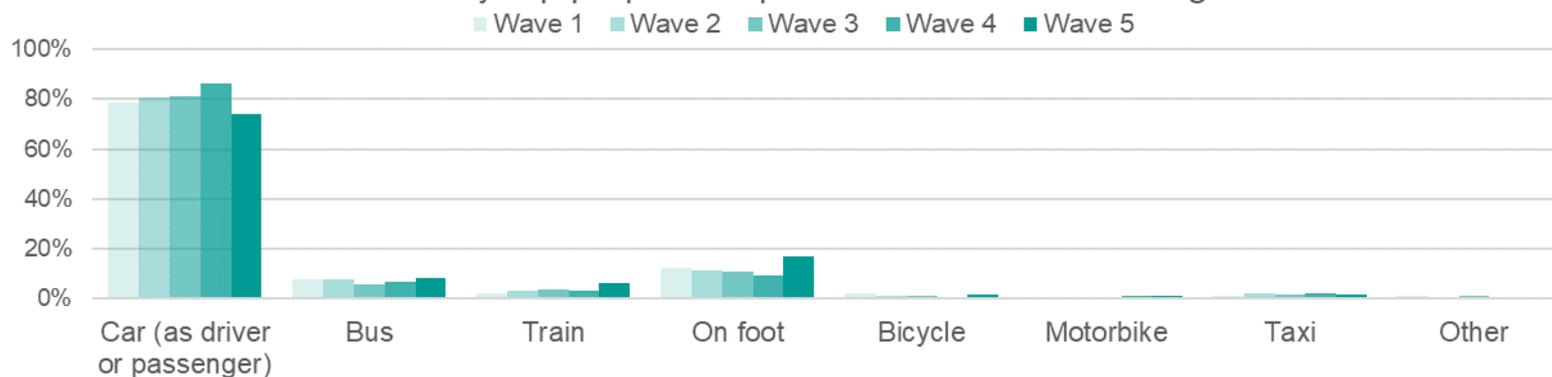
Modal shift by trip purpose: other travel into city centres
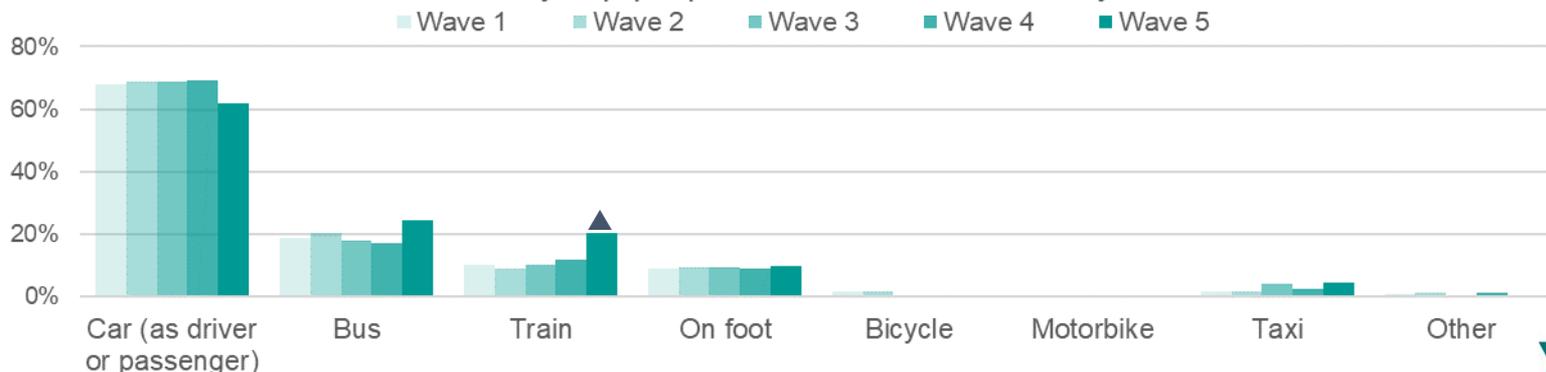
Wave 1 ■ Wave 2 ■ Wave 3 ■ Wave 4 ■ Wave 5

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

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W1-W5 trends: Modal choice by trip purpose (II)

Mode choice for main grocery shopping over the coming weeks shows increases in car and walking preference compared to wave 1.

For social and exercise trips intent to travel by car, bus, train and taxi all increase *significantly* with respect to wave 1, while active modes remain at similar levels.

Modal shift by trip purpose: trips to main grocery shopping

■ Wave 1 ■ Wave 2 ■ Wave 3 ■ Wave 4 ■ Wave 5
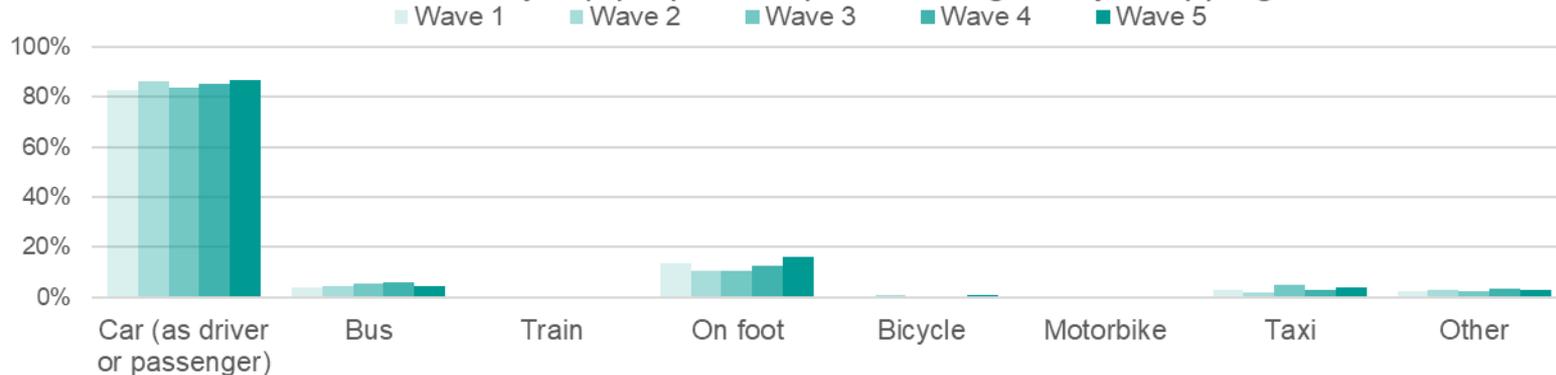
Modal shift by trip purpose: for socialising, leisure or exercise

■ Wave 1 ■ Wave 2 ■ Wave 3 ■ Wave 4 ■ Wave 5

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

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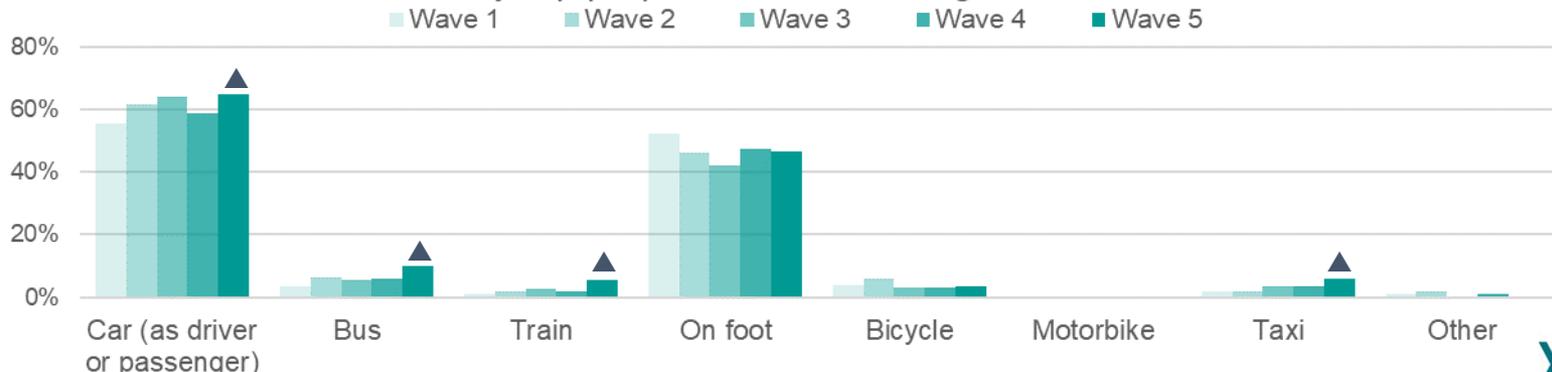
W1-W5 trends: concerns about public transport

There is *significantly* less concern about using public transport over time, although there are differences between age groups; those aged under 34 are 64% more likely than those aged over 65 to be 'not at all concerned' about using public transport. Compared to the previous wave, there is an increase in the proportion of respondents who are 'moderately concerned', particularly amongst those aged over 65.

Concern about using public transport
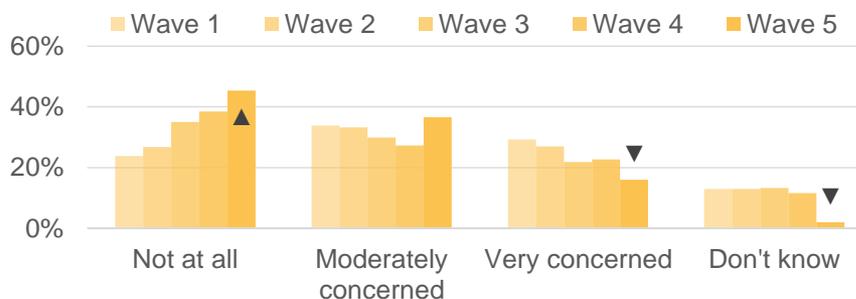
Age 16 to 34
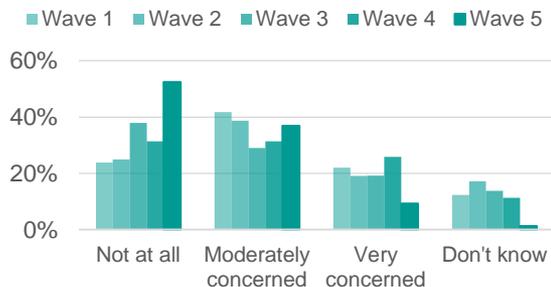
Age 35 to 64
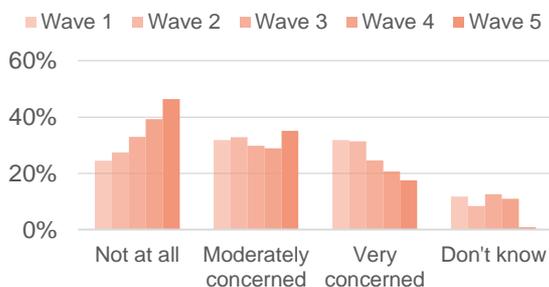
Age over 65
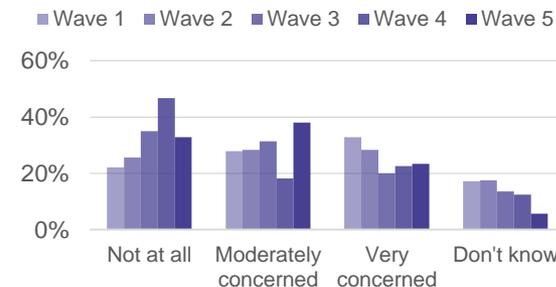
▲ / ▼ denote significant changes in the responses compared to wave 1.

Q: In relation to COVID, would you be concerned about using public transport over the coming weeks?

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W1-W5 trends: travel and alternative activity

In general wave 5 shows a move towards pre-pandemic levels for the coming weeks compared with wave 4, with some *significant* changes since wave 1.

Intention to do **less** in the coming weeks than before COVID
Wave 1 Wave 2 Wave 3 Wave 4 Wave 5

Intention to do **same** in the coming weeks as before COVID
Wave 1 Wave 2 Wave 3 Wave 4 Wave 5

Intention to do **more** in the coming weeks than before COVID
Wave 1 Wave 2 Wave 3 Wave 4 Wave 5

Categories: Travel by bus, Travel by train, Travel by car/van, Bicycle for recreation, Bicycle for utility, On foot for recreation, On foot for utility, Shop online food & basics, Shop online other items

▲ / ▼ 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 before COVID?

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W1-W5 trends: current work from home

In the latest survey *significantly* fewer respondents (30%) reported currently working from home, which has steadily declined since the first wave in June 2020 (47%). In parallel, the number of people working from home sometimes or not at all has grown. These results reflect the easing of restrictions, although the governments work-from-home advice remained in place since last autumn.
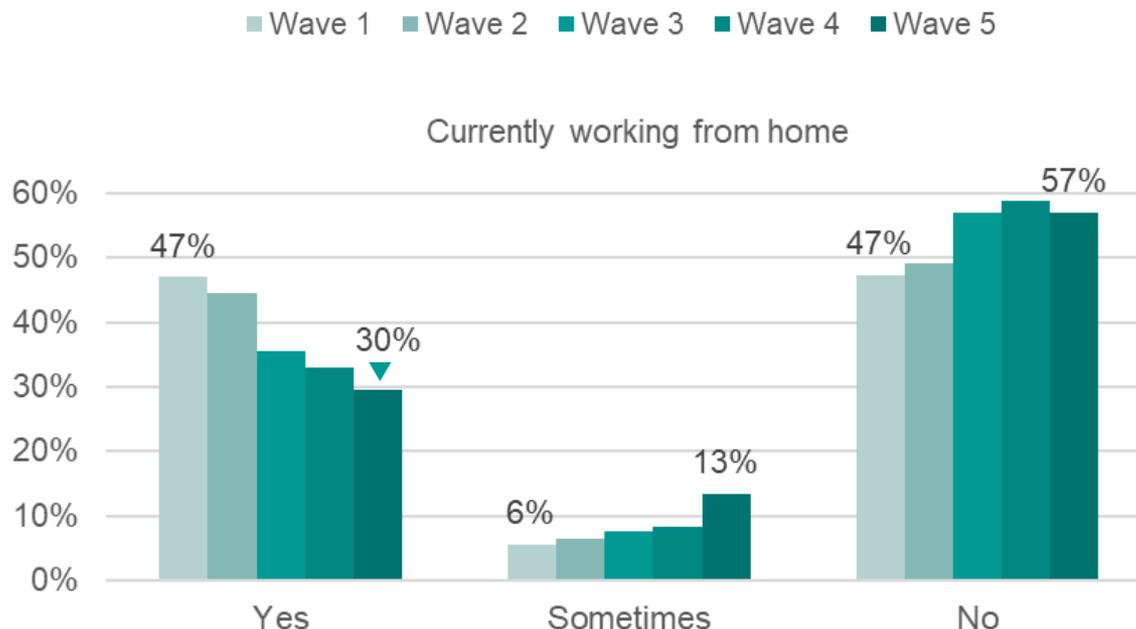
▲ / ▼ denote significant changes in the responses compared to wave 1.

Q. In the current situation are you working from home?

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W1-W5 trends: home working sentiments

Home working sentiments have remained positive over the survey waves; in the latest wave 72% of respondents reported a positive work-at-home experience and the share of those having a very positive experience has grown over time.

Legend: ■ Wave 1 ■ Wave 2 ■ Wave 3 ■ Wave 4 ■ Wave 5

Home working sentiments

Positive: 67% ... 72%
Neutral: 20% ... 19%
Negative: 11% ... 9%

Very positive: 22% ... 37%
Generally positive: 45% ... 35%
Neutral: 20% ... 19%
Generally negative: 9% ... 6%
Very negative: 3% ... 4%
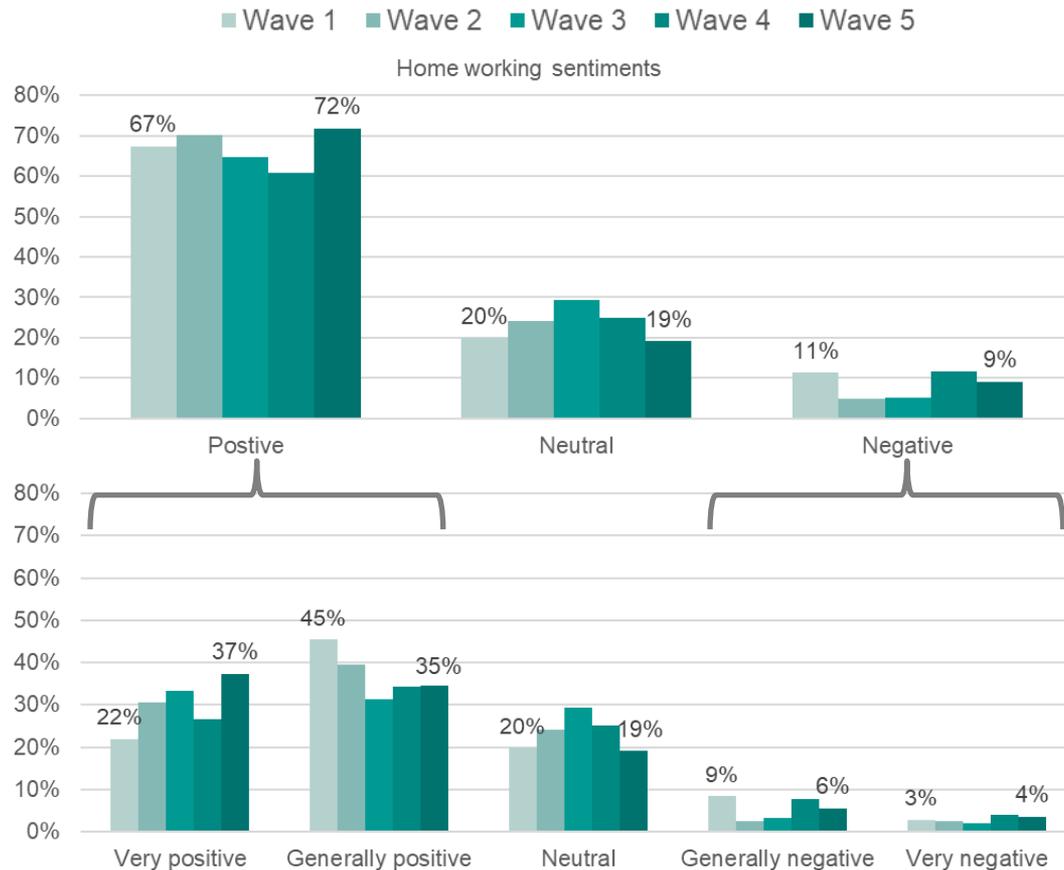
▲ / ▼ denote significant changes in the responses compared to wave 1.

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

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W1-W5 trends: home working in the long term

Over three quarters of respondents said that, in the long term, they are likely to work from home more often than before COVID; almost half said this would be very likely, with the share increasing over time. The results further support a sustained preference for more home working in the long term compared to pre-COVID.

■ Wave 1 ■ Wave 2 ■ Wave 3 ■ Wave 4 ■ Wave 5

Working from home in the long term

▲ / ▼ denote significant changes in the responses compared to wave 1.
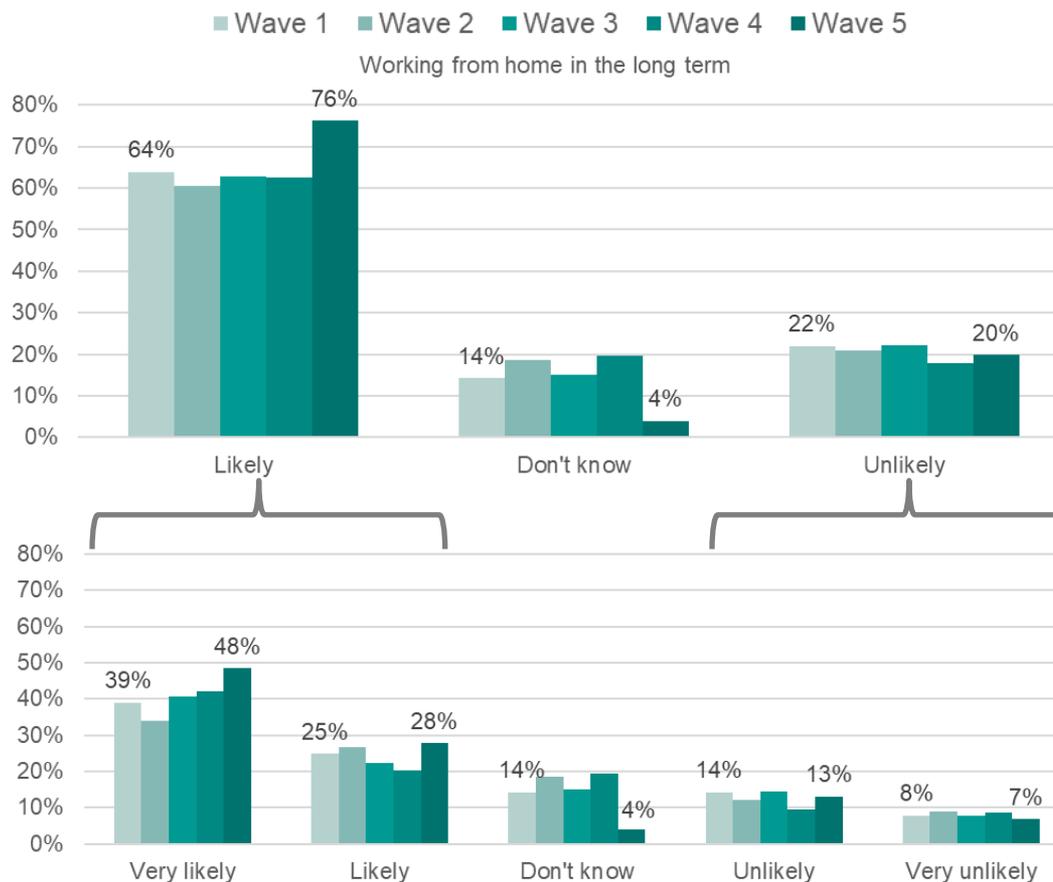
Q. In the long term, how likely are you to work from home more often than you did before the lockdown?

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Impact on travel behaviour

Mode shift: work / socialising and leisure

Comparison of mode choice from before COVID-19 to intentions over the coming weeks suggests some avoidance of public transport for trips to work, with a shift towards walking. For socialising, leisure or exercise trips, mode preference moves away from motorised modes with an increase in walking and cycling.
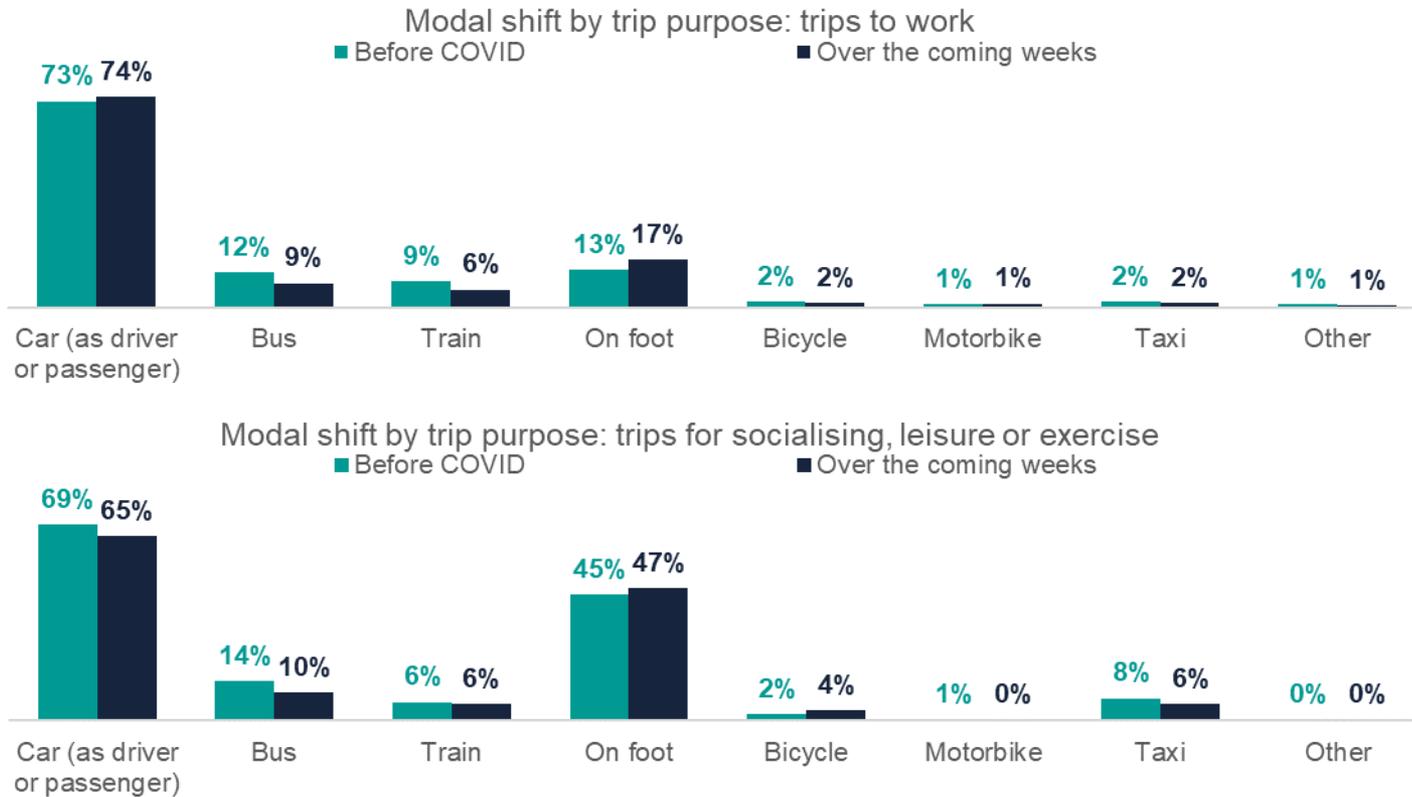
Modal shift by trip purpose: trips to work

■ Before COVID   ■ Over the coming weeks

Mode	Before COVID	Over the coming weeks
Car (as driver or passenger)	73%	74%
Bus	12%	9%
Train	9%	6%
On foot	13%	17%
Bicycle	2%	2%
Motorbike	1%	1%
Taxi	2%	2%
Other	1%	1%

Modal shift by trip purpose: trips for socialising, leisure or exercise

■ Before COVID   ■ Over the coming weeks

Mode	Before COVID	Over the coming weeks
Car (as driver or passenger)	69%	65%
Bus	14%	10%
Train	6%	6%
On foot	45%	47%
Bicycle	2%	4%
Motorbike	1%	0%
Taxi	8%	6%
Other	0%	0%

Q: Before COVID how did you normally travel for the following journeys: work/socialising, leisure or exercise (604 work/940 leisure)
Q: Over the coming weeks how will you travel for the following journeys: work/socialising, leisure or exercise (503 work/926 leisure)

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Mode shift: grocery shopping

Mode share for main grocery shopping over the coming weeks shows a modest decrease in car and bus use, and a similar increase in walking and cycling. For local grocery shopping, intentions show a move away from motorised modes, particularly car, towards walking.

Modal shift by trip purpose: trips for main grocery shopping
■ Before COVID   ■ Over the coming weeks

Mode	Before COVID	Over the coming weeks
Car (as driver or passenger)	89%	87%
Bus	6%	5%
Train	0%	0%
On foot	14%	16%
Bicycle	0%	1%
Motorbike	0%	0%
Taxi	5%	4%
Other	2%	3%

Modal shift by trip purpose: trips for local grocery shopping
■ Before COVID   ■ Over the coming weeks

Mode	Before COVID	Over the coming weeks
Car (as driver or passenger)	64%	58%
Bus	4%	3%
Train	0%	0%
On foot	43%	49%
Bicycle	0%	1%
Motorbike	0%	0%
Taxi	2%	2%
Other	0%	1%

Q: Before COVID how did you normally travel for the following journeys: main/local grocery shopping (909 main/933 local)
Q: Over the coming weeks how will you travel for the following journeys: main/local grocery shopping (886 main/925 local)

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Mode shift: other travel into city centres

Modal choice for other travel into city centres over the coming weeks shifts towards car use and walking, moving away from bus and train.
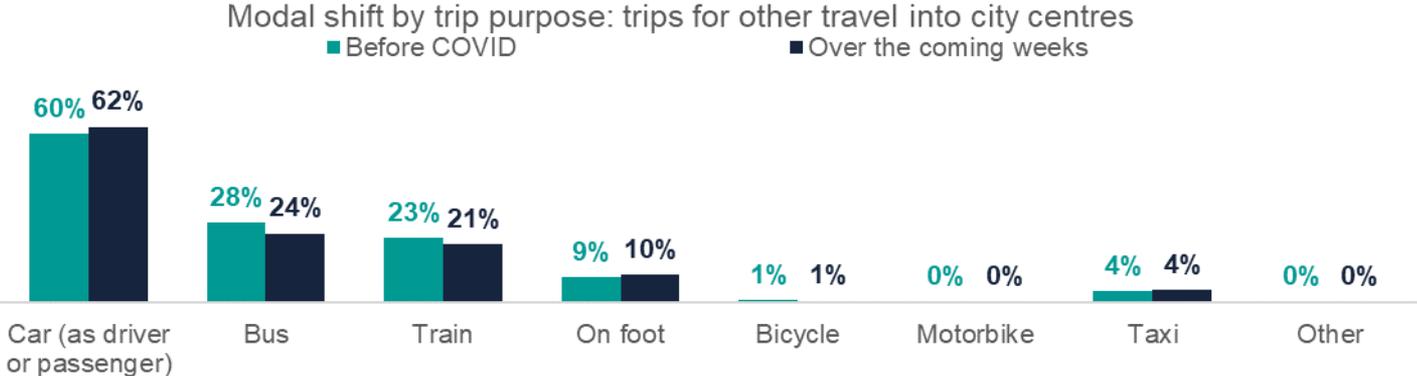
Modal shift by trip purpose: trips for other travel into city centres
■ Before COVID   ■ Over the coming weeks

Mode	Before COVID	Over the coming weeks
Car (as driver or passenger)	60%	62%
Bus	28%	24%
Train	23%	21%
On foot	9%	10%
Bicycle	1%	1%
Motorbike	0%	0%
Taxi	4%	4%
Other	0%	0%

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Walking and cycling

Change in walking, running and cycling

Overall, results suggest an increase in walking and running, with a higher proportion of respondents (35%) reporting greater levels of activity than those who say the travel by active modes less (18%). Around half of respondents report no change to their activity levels.
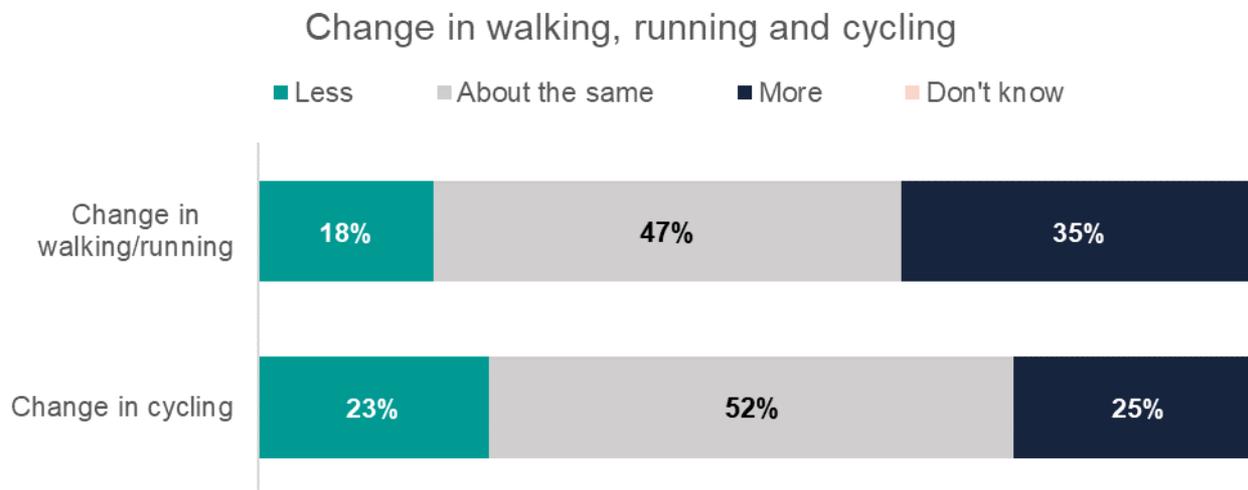
Change in walking, running and cycling

■ Less   ■ About the same   ■ More   ■ Don't know

	Less	About the same	More	Don't know
Change in walking/running	18%	47%	35%	
Change in cycling	23%	52%	25%	

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Change in walking and running

A quarter of respondents in the 65+ age group are walking or running less than before COVID-19, with males being less likely to have changed their walking or running habits. 16-34 year olds were most likely to be more active. More respondents in the BAME group reported walking or running less.

Walking and running by age group, gender and ethnic background

■ Less   ■ About the same   ■ More

Group	Less	About the same	More
All respondents (1,000)	18%	47%	35%
16-34 (322)	18%	37%	44%
35-64 (461)	14%	52%	34%
65+ (210)	25%	50%	24%
Male (475)	16%	49%	34%
Female (519)	19%	44%	36%
White (835)	17%	47%	36%
BAME (158)	21%	43%	35%
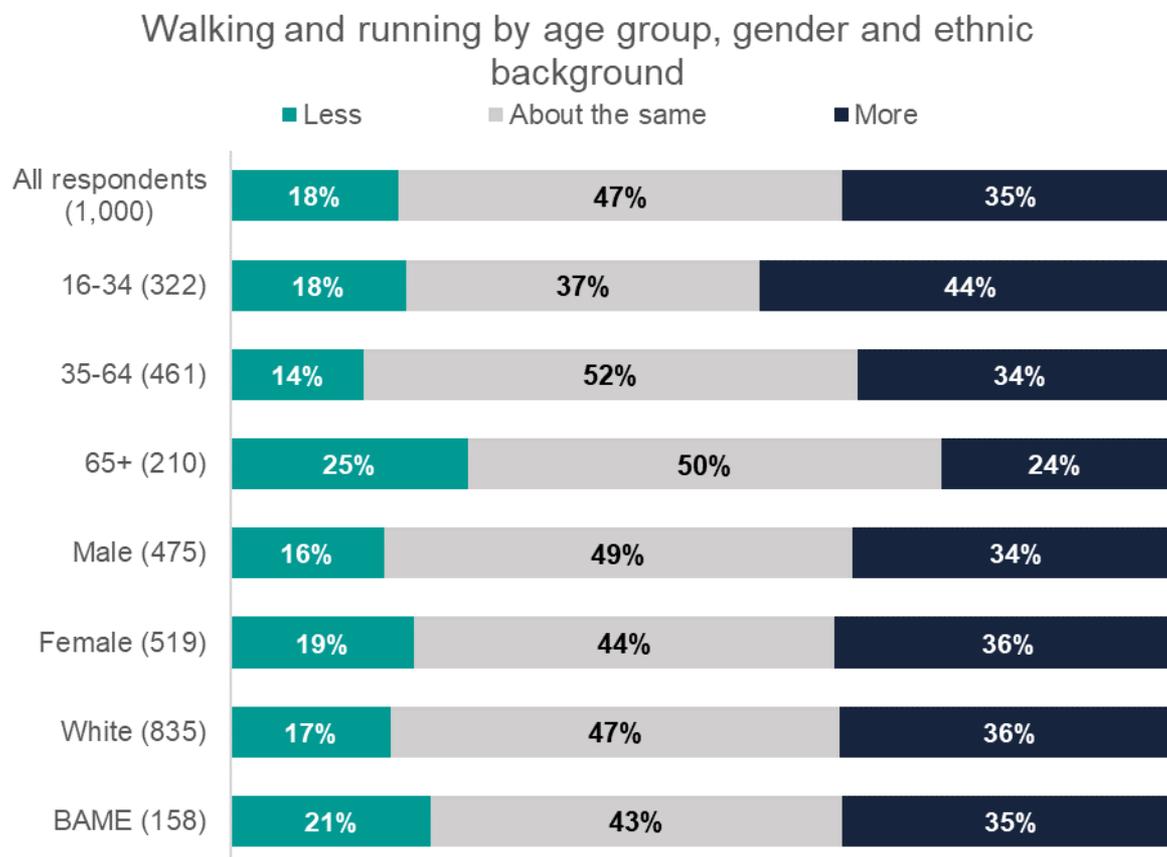
Q: Are you walking/running any more or any less than you did before COVID? (1,000)

Change in walking and running

Bradford had the highest proportion of respondents walking or running less, Calderdale and Leeds had the highest proportion reporting more. Wakefield and Kirklees were the least changed.

Walking and running by district

■ Less   ■ About the same   ■ More   ■ Don't know

District	Less	About the same	More
All respondents (1,000)	18%	47%	35%
Bradford (222)	21%	44%	35%
Calderdale (92)	17%	43%	39%
Kirklees (189)	18%	50%	30%
Leeds (345)	16%	45%	38%
Wakefield (152)	14%	51%	34%

Q: Are you walking/running any more or any less than you did before COVID? (1,000)

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Change in cycling

People aged 16-34 reported the highest increase in cycling, with people aged 65+ reporting the highest decrease. A greater proportion of females reported cycling more. Results of this question should be treated cautiously due to the relatively small sample size of some categories.

Cycling by age group, gender and ethnic background

■ Less   ■ About the same   ■ More   ■ Don't know

	Less	About the same	More
All respondents (282)	23%	52%	25%
16-34 (106)	25%	46%	28%
35-64 (147)	18%	60%	22%
65+ (27)	44%	33%	22%
Male (176)	23%	56%	22%
Female (103)	23%	46%	31%
White (234)	23%	53%	24%
BAME (46)	22%	50%	28%
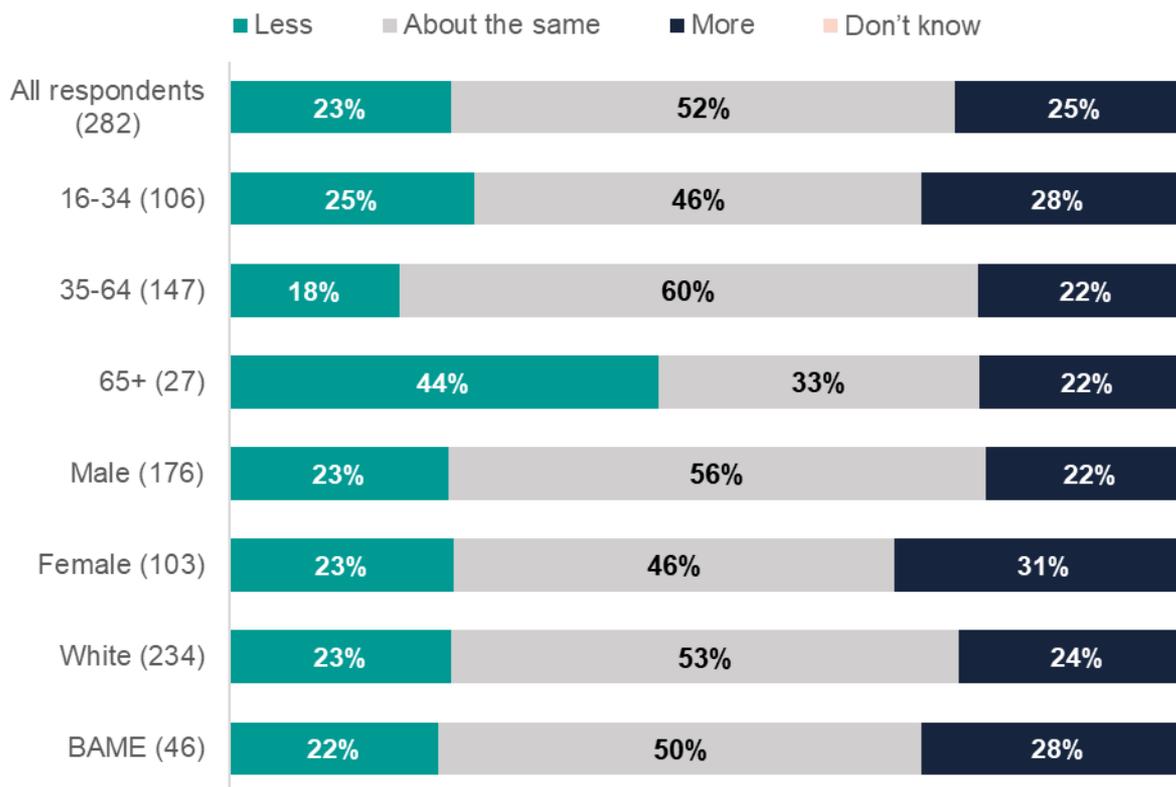
Q: Are you cycling any more or any less than you did before COVID? (282)

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Reasons for increased walking and cycling

The main reason for increased walking and running is for leisure or exercise (39%), likewise for cycling (45%). Having more time available was the second most common response for both modes. 5% of those walking and running more had concerns about public transport.

Main reasons for increased walking and running

Reason	%
For leisure/exercise	39%
More time available	20%
Spend time with family	7%
Good weather	6%
Easier to get to local shops	5%
Public transport concern/fear	5%
Other not specified	4%
Encourage children to exercise	4%
Roads are safer/less traffic	3%
Cleaner air/better air quality	3%
Lack of alternative modes	3%
Boredom	1%
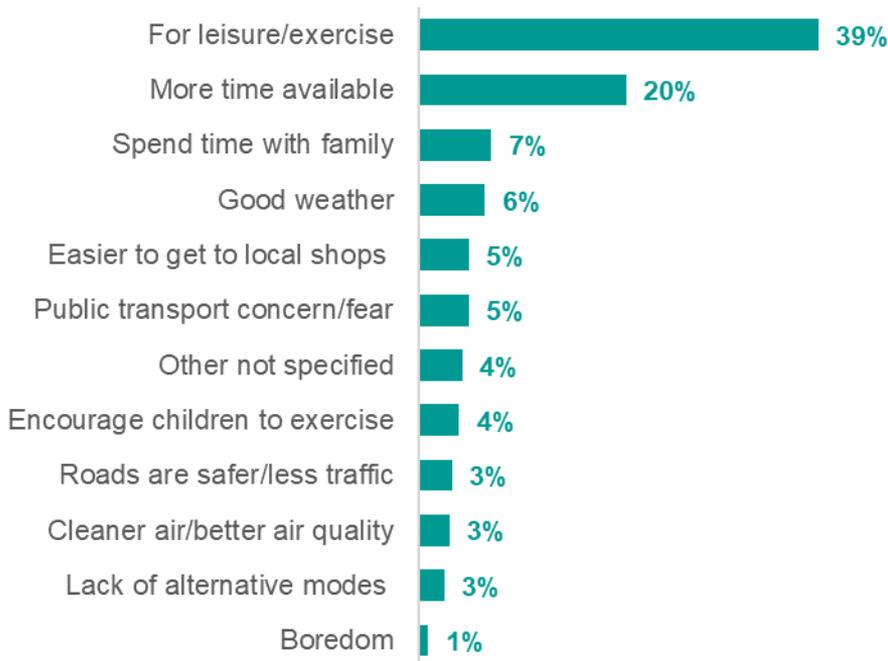
Main reasons for increased cycling

Reason	%
For leisure/exercise	45%
More time available	18%
Roads are safer/less traffic	6%
Good weather	6%
Spend time with family	4%
Cleaner air/better air quality	4%
Encourage children to exercise	3%
Easier to get to local shops	3%
Lack of alternative modes	3%
Public transport concern/fear	3%
Other not specified	3%
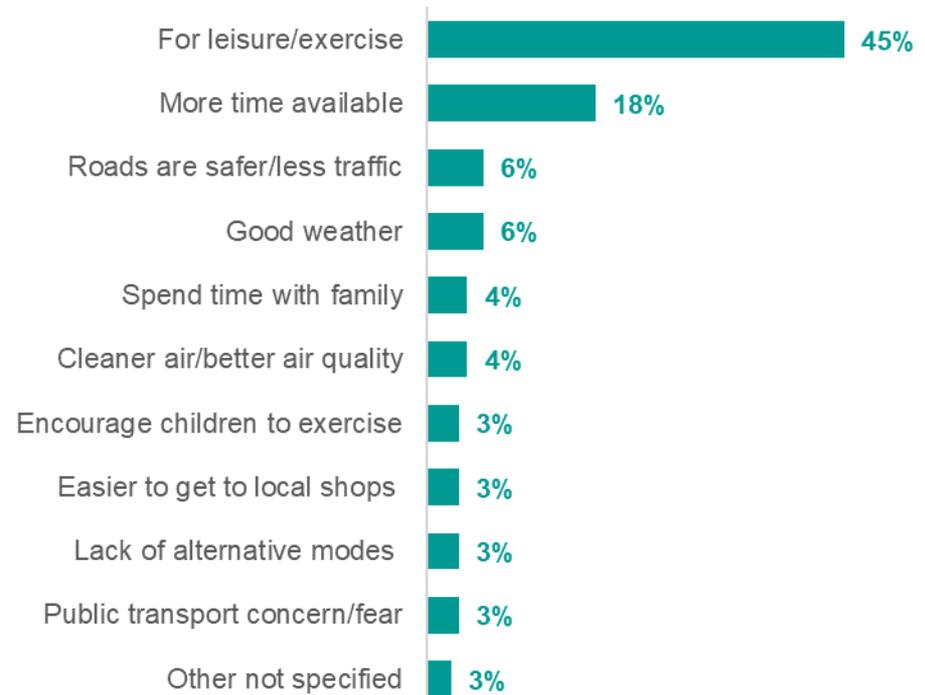
Q: What would you say are the main reasons that you are walking and running more? (354)
Q: What would you say are the main reasons that you are cycling more? (70)

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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 16-34 group reported having more time available as a main motivation. For more female than male respondents, this was having more time available.

Main reasons for increased walking and running by age

■ 16-35 ■ 35-64 ■ 65+

Reason	16-35	35-64	65+
For leisure/exercise	33%	41%	46%
More time available	23%	19%	16%
Spend time with family	9%	6%	3%
Good weather	7%	5%	8%
Easier to get to local shops	5%	4%	5%
Public transport concern/fear	6%	4%	5%
Other*	13%	14%	14%
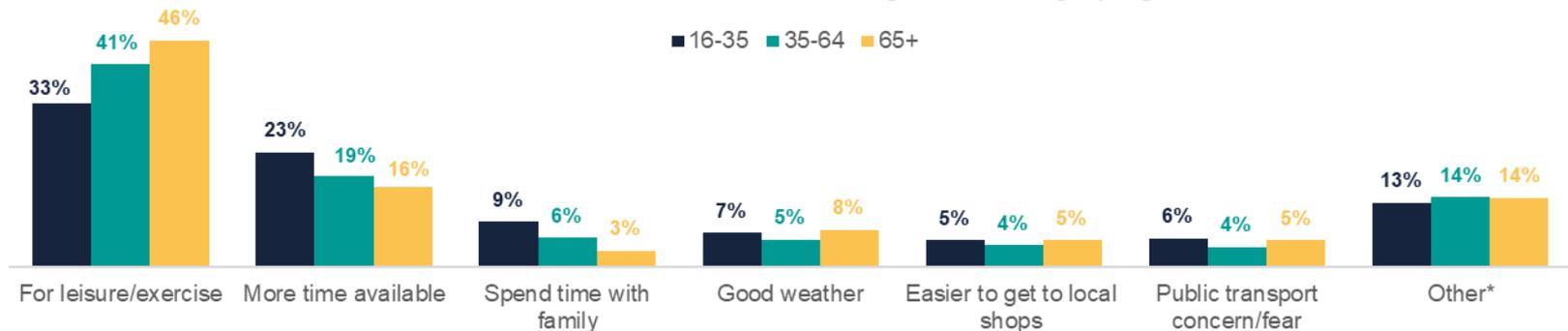
* Includes: Other not specified, (16-35: 3%; 35-64: 6%; 65+: 2%); encourage children to exercise (16-35: 3%; 35-64: 5%; 65+: 3%); roads are safer/less traffic (16-35: 4%; 35-64: 3%; 65+: 4%); cleaner air/better air quality (16-35: 2%; 35-64: 3%; 65+: 6%); lack of alternative modes (16-35: 3%; 35-64: 3%); boredom (35-64: 2%).

Main reasons for increased walking and running by gender

■ Male ■ Female

Reason	Male	Female
For leisure/exercise	40%	37%
More time available	16%	24%
Spend time with family	7%	7%
Good weather	7%	6%
Easier to get to local shops	7%	3%
Public transport concern/fear	3%	6%
Other*	14%	13%
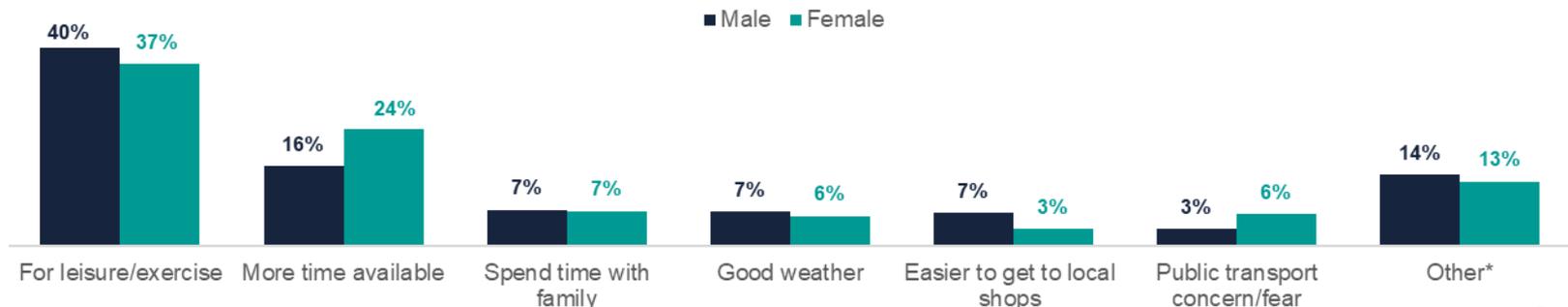
* Includes: Other not specified, (Male: 5%, Female: 3%); encourage children to exercise (Male: 4%, Female: 4%); roads are safer/less traffic (Male: 3%, Female: 3%); cleaner air/better air quality (Male: 4%, Female: 2%); lack of alternative modes (Male: 3%, Female: 2%); boredom (Female: 2%).

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

Fewer Bradford and Calderdale respondents mentioned leisure/exercise as the main motivation for increased walking/running. BAME respondents mentioned leisure/exercise less often than white respondents. Results for cycling are not reported in this level of detail due to the relatively small sample size obtained (70 respondents).

Main reasons for increased walking and running by district

Legend: ■ Bradford ■ Calderdale ■ Kirklees ■ Leeds ■ Wakefield

| Reason	Bradford	Calderdale	Kirklees	Leeds	Wakefield
For leisure/exercise	33%	44%	36%	40%	46%
More time available	18%	23%	21%	20%	22%
Spend time with family	6%	6%	8%	8%	5%
Good weather	7%	8%	6%	7%	5%
Easier to get to local shops	5%	4%	6%	4%	5%
Public transport concern/fear	7%	6%	5%	4%	4%
Other*	19%	8%	15%	12%	12%
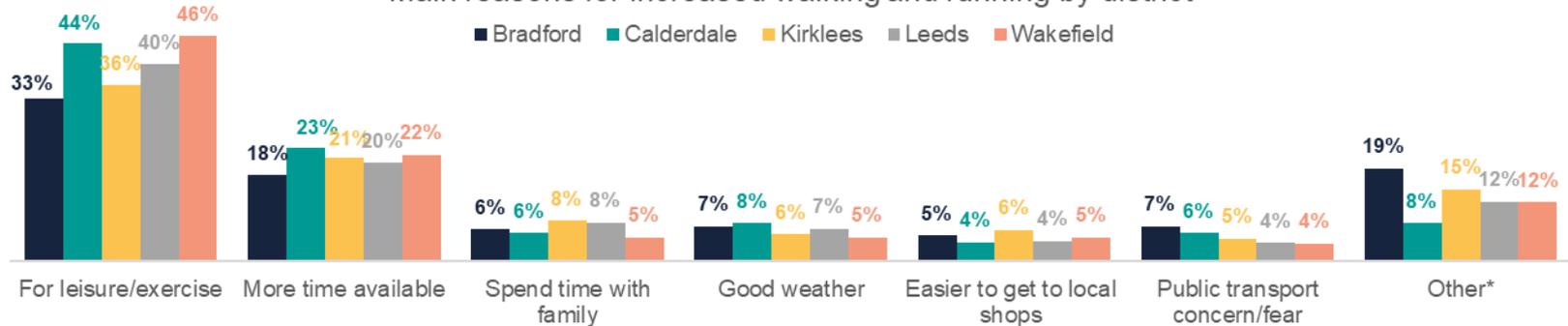
* Includes: Other not specified, (B: 5%; C: 2%; K: 4%; L: 5%; W: 2%); encourage children to exercise (B: 5%; K: 5%; L: 5%; W: 2%); roads are safer/less traffic (B: 5%; C: 4%; K: 4%; L: 3%; W: 1%); cleaner air/better air quality (B: 6%; K: 2%; L: 2%; W: 4%); lack of alternative modes (B: 2%; C: 4%; K: 4%; L: 2%; W: 4%); boredom (B: 2%; L: 1%; W: 1%); dog walking (K: 1%).

Main reasons for increased walking and running by ethnicity

Legend: ■ White ■ BAME

Reason	White	BAME
For leisure/exercise	40%	31%
More time available	21%	15%
Spend time with family	7%	7%
Good weather	6%	8%
Easier to get to local shops	5%	5%
Public transport concern/fear	4%	8%
Other*	12%	21%
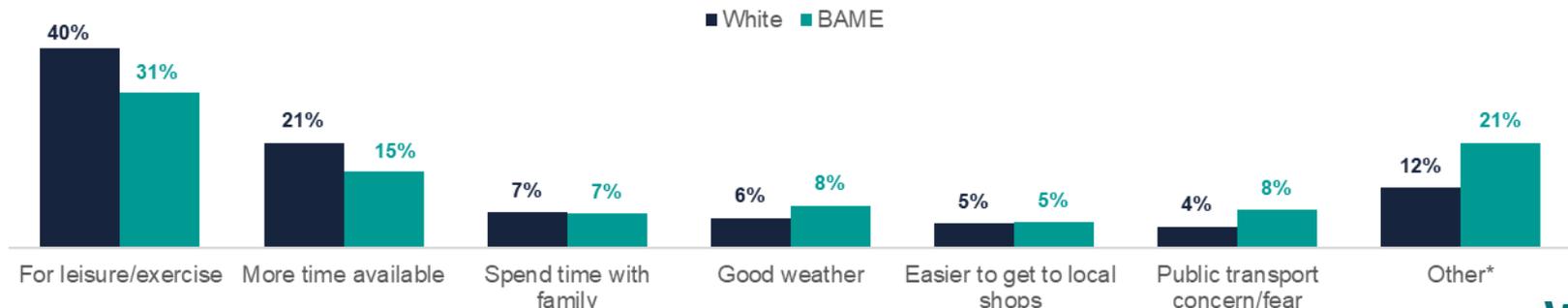
* Includes: Other not specified, (White: 4%, BAME: 4%); encourage children to exercise (White: 4%, BAME: 4%); roads are safer/less traffic (White: 3%, BAME: 7%); cleaner air/better air quality (White: 3%, BAME: 4%); lack of alternative modes (White: 2%, BAME: 5%); boredom (White: 1%, BAME: 1%).

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Bicycle riding in the last couple of years

28% of respondents reported riding a bicycle in the past couple of years. People aged under 65 and males were *significantly* more likely to have been cycling. Cycling prevalence was relatively high in Calderdale and Leeds, but low in Kirklees.

Ridden a bicycle in the last couple of years, by demographic

■ Yes   ■ No

Demographic	Yes	No
All respondents (1,000)	28%	72%
16-34 (322)	33%	67%
35-64 (461)	32%	68%
65+ (210)	13%	87%
Male (475)	37%	63%
Female (519)	20%	80%
White (835)	28%	72%
BAME (158)	29%	71%
Bradford (222)	26%	74%
Calderdale (92)	32%	68%
Kirklees (189)	20%	80%
Leeds (345)	34%	66%
Wakefield (152)	28%	72%
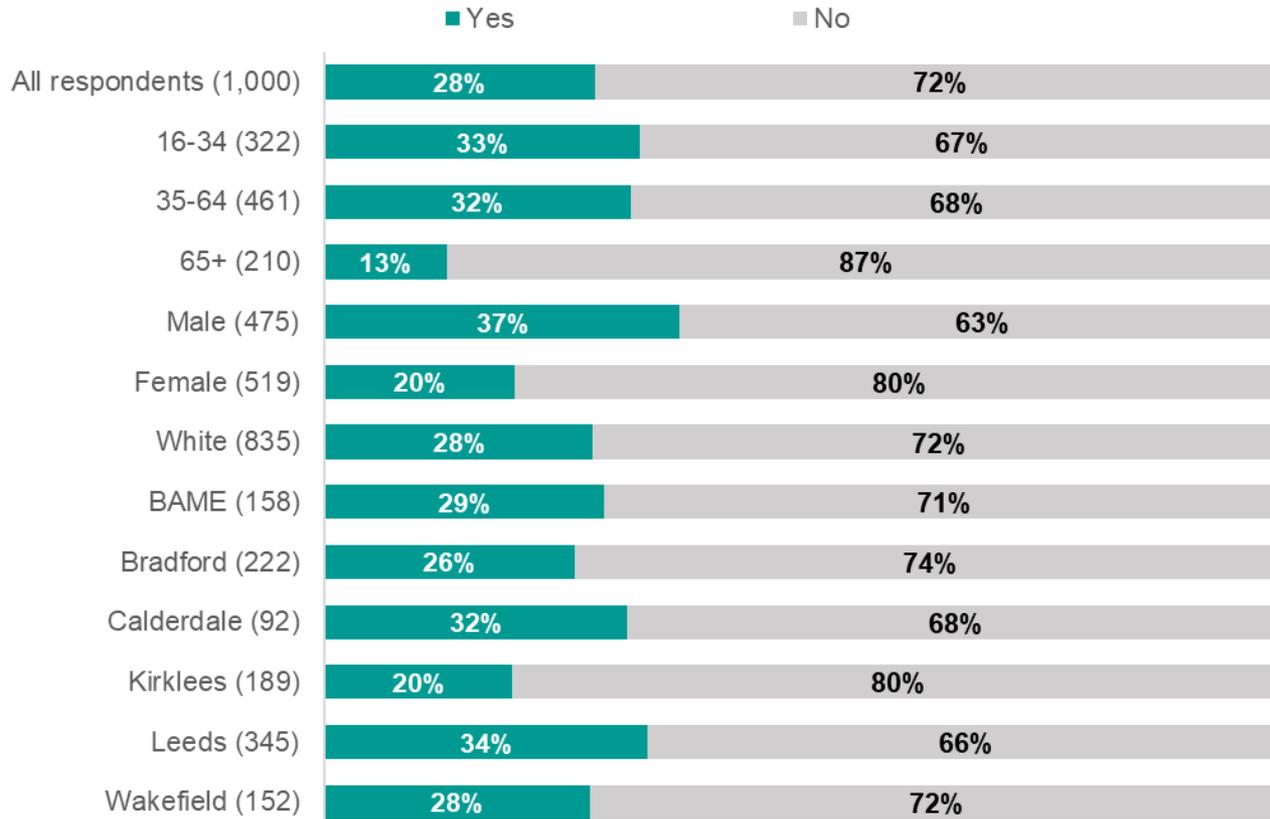
Q: Have you ridden a bicycle in the last couple of years? (1,000)

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Future trends

Changes in motorised vehicle use - permanency

28% of respondents say they will use the bus and train less in the coming weeks (compared to pre-COVID-19) and expect this change to be permanent.
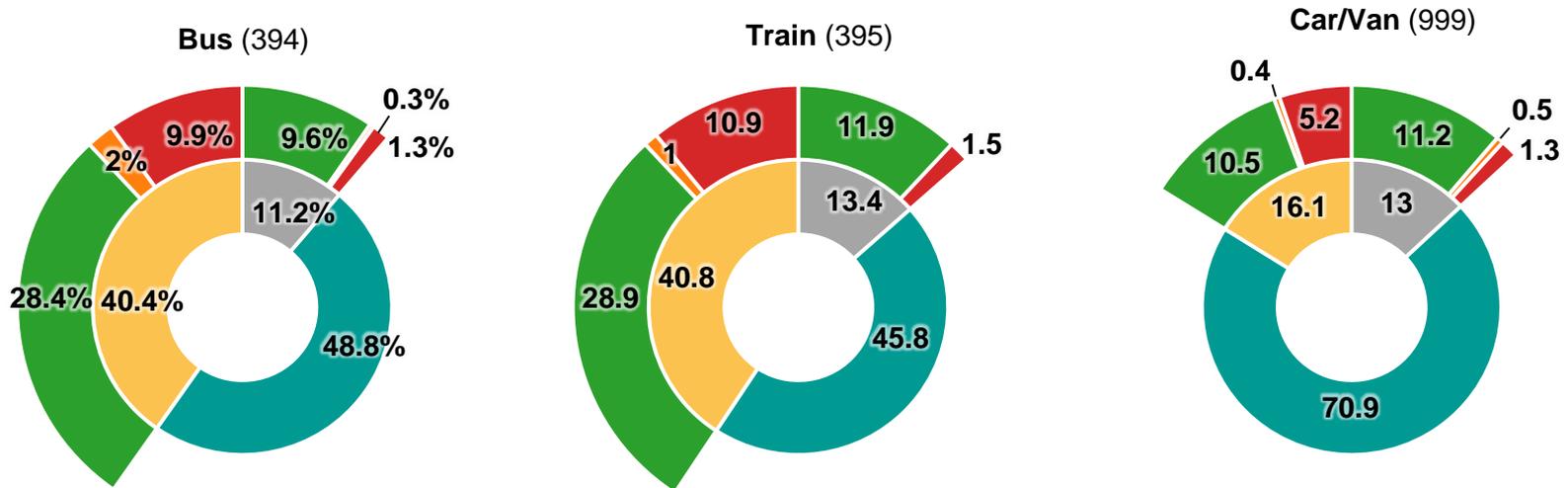
Bus (394)

- 0.3%
- 1.3%
- 9.6%
- 9.9%
- 2%
- 11.2%
- 28.4%
- 40.4%
- 48.8%

Train (395)

- 10.9
- 11.9
- 1.5
- 1
- 13.4
- 28.9
- 40.8
- 45.8

Car/Van (999)

- 0.4
- 5.2
- 11.2
- 0.5
- 1.3
- 10.5
- 16.1
- 13
- 70.9

How to read these charts

- Unlikely
- Likely
- Don't know
- Don't know
- Less
- More
- Likely
- Same
- Unlikely
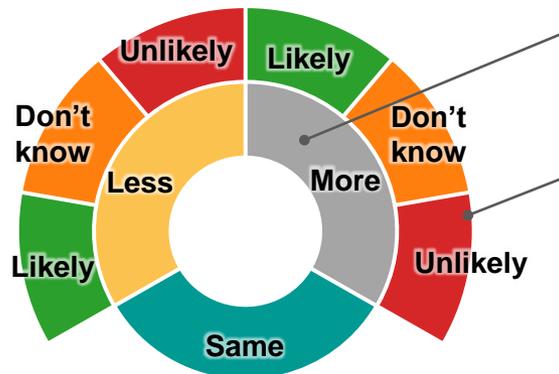
Inner circle – Change in activity/travel choices in the coming weeks, relative to pre-COVID-19

Outer circle – to what extent respondents think these changes will become permanent. Percentages in each section of the outer circle total parent values in the inner circle.

Intentions in the coming weeks

- More than before COVID-19
- Same as before COVID-19
- Less than as before COVID-19

Will this be a Permanent change

- Likely
- Don't know
- Unlikely

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Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before COVID?
Q: How likely or unlikely is the change going to be permanent? Base (in brackets): Respondents who do the activity.

Changes in active travel - permanency

One third of respondents say they will walk more for recreation in the coming weeks (compared to pre-COVID-19) and expect this change to be permanent.

Almost a quarter of respondents say they will walk more for utility in the coming weeks (compared to pre-COVID-19) and 22.7% expect this change to be permanent.

Bicycle – Recreation (282)

23.1%
25.5%
0.7%
1.8%
58.2%
16.3%
8.5%
7.8%

On foot – Recreation (961)

0.6%
3.2%
4.9%
33.6%
36.3%
0.2%
2.5%
55.2%
8.5%

Bicycle – Utility (279)

15.1%
16.8%
0.4%
1.4%
61.6%
21.5%
10.4%
11.1%

On foot – Utility (999)

0.6%
3.7%
5%
22.7%
24.9%
0.4%
1.8%
65.8%
9.3%

Intentions in the coming weeks
- More than before COVID-19
- Same as before COVID-19
- Less than as before COVID-19

Will this be a Permanent change
- Likely
- Don't know
- Unlikely

west Yorkshire Combined Authority

Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before COVID?
Q: How likely or unlikely is the change going to be permanent? Base (in brackets): Respondents who do the activity.

Changes in online shopping - permanency

Over half of all respondents expect to do the same amount of shopping online in the coming weeks as they would have before COVID-19; however between 28-35% expect to do more, and most of these expect this to become a permanent change.
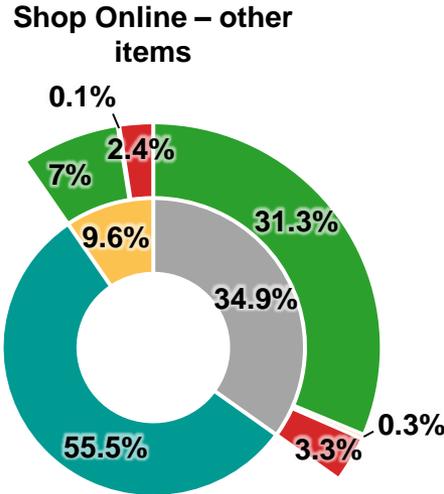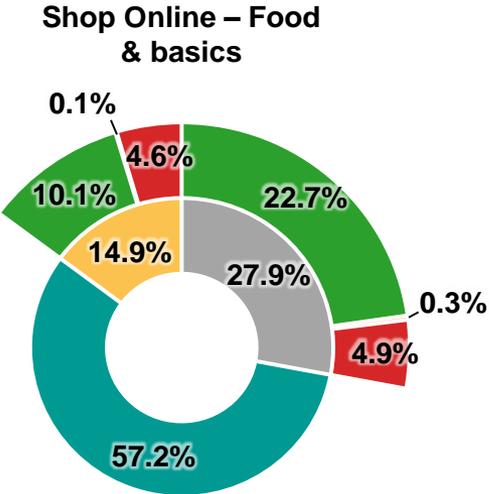
Shop Online – Food & basics

0.1%
4.6%
10.1%
14.9%
22.7%
27.9%
0.3%
4.9%
57.2%

Shop Online – other items

0.1%
2.4%
7%
9.6%
31.3%
34.9%
0.3%
3.3%
55.5%

Intentions in the coming weeks

- ⬜ More than before COVID-19
- 🟩 Same as before COVID-19
- 🟨 Less than as before COVID-19

Will this be a Permanent change

- 🟩 Likely
- 🟧 Don't know
- 🟥 Unlikely

Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before COVID?
Q: How likely or unlikely is the change going to be permanent? Base (in brackets): Respondents who do the activity.

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Changes in activity – permanency (I)

This chart compares long-term expectations of change. It shows on balance people are more likely to do remote activities more (work from home, shop online), use buses and trains less, and use active travel more (bicycle and on foot). It appears that increases and decreases in car/van travel could balance each other out.
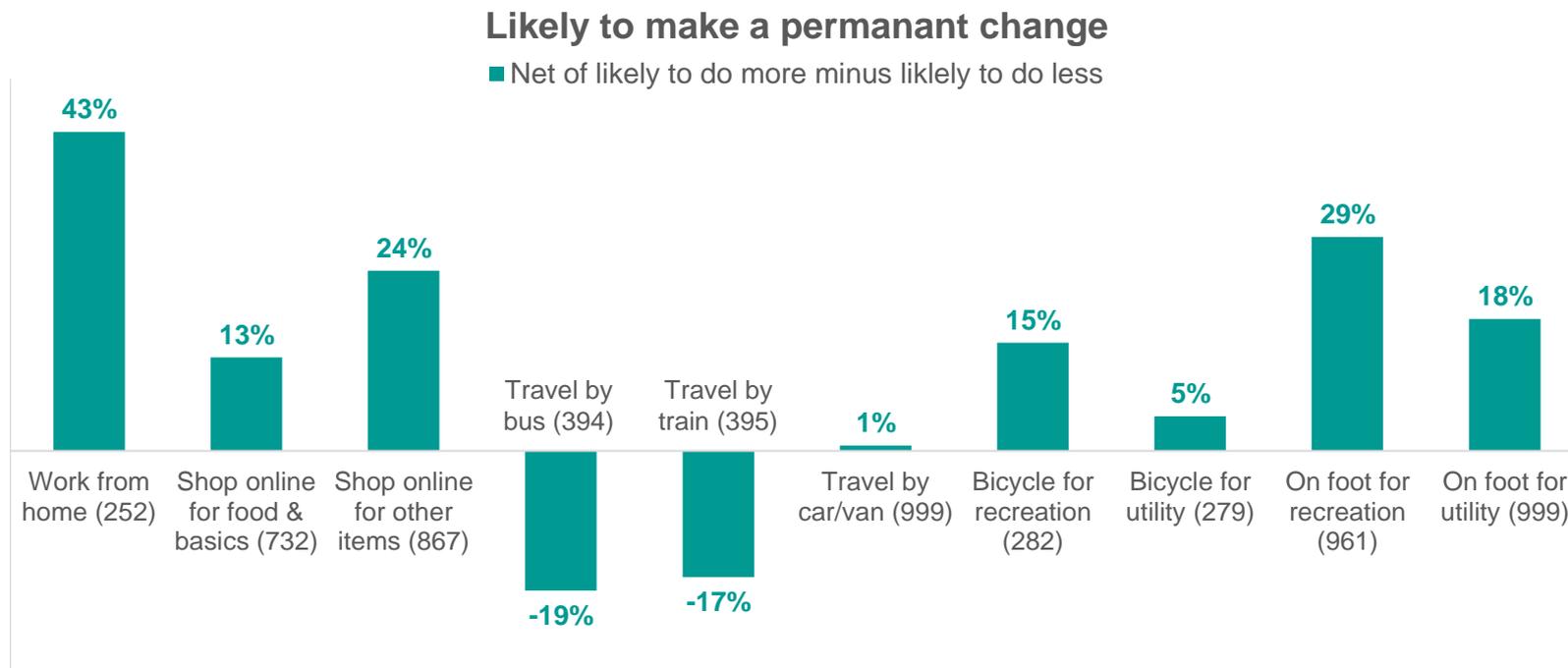
Likely to make a permanant change

■ Net of likely to do more minus liklely to do less

Category	Value
Work from home (252)	43%
Shop online for food & basics (732)	13%
Shop online for other items (867)	24%
Travel by bus (394)	-19%
Travel by train (395)	-17%
Travel by car/van (999)	1%
Bicycle for recreation (282)	15%
Bicycle for utility (279)	5%
On foot for recreation (961)	29%
On foot for utility (999)	18%

Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before COVID?
Q: How likely or unlikely is the change going to be permanent?
Base (in brackets): People who were routed to answer the question, excluding 'I never do this' responses.

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Changes in activity – permanency (II)

The following groups *appear* more likely than others to make permanent changes compared with before COVID:

Work from home more:
Female or
White or
Age 35+ or
Live in Leeds or
Used public transport at least once a month before COVID

Shop online more:
Male or
White or
Age 16-34 or
Used public transport at least once a month before COVID

Travel by bus less:
Male *or*
White *or*
Age 65+

Travel by train less:
Female *or*
White *or*
Age 35-64 or 65+

Bicycle more:
Male or
Ethnic minority or
Age 35-64 or
Used public transport at least once a month before COVID

Walk more:
Female or
White or
Age 16-34 or
Used public transport at least once a month before COVID

Travel by car more:
Female or
Ethnic minority or
Age 16-34

Samples for most groups are small so appearances may not be statistically significant for each group.
Base: People who were routed to answer the question, excluding 'I never do this' responses.
Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before COVID?
Q: How likely or unlikely is the change going to be permanent?

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Shopping online intentions

A *significantly* greater proportion of respondents said they expect to shop online more (28%) compared the those who said they would do less online shopping (15%). Gender differences for online shopping more than before COVID-19 have reduced since wave 4. It still appears that female respondents were more likely to increase their online shopping than males, but the difference was smaller, reducing from 12% to 2% for *food and basics* and from 16% to 6% *for other items*. Respondents who currently work from home are *significantly* more likely than other workers to shop online more than before COVID. This is a change from wave 4.

Shopping on line over the coming weeks
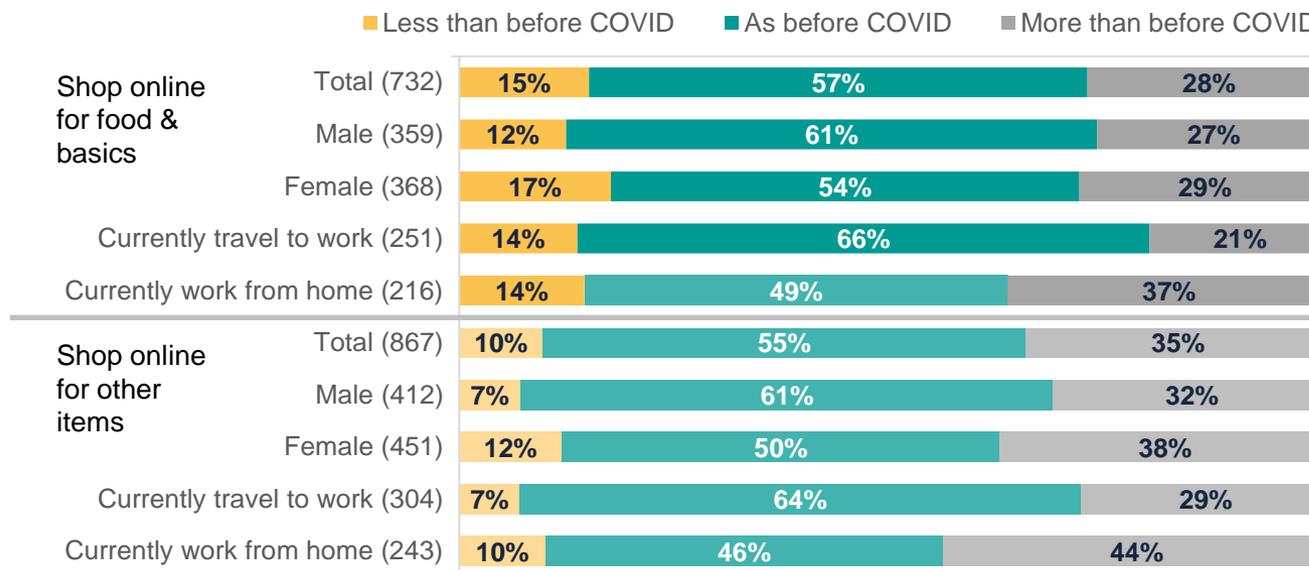
Legend: ■ Less than before COVID ■ As before COVID ■ More than before COVID

		Less than before COVID	As before COVID	More than before COVID
Shop online for food & basics	Total (732)	15%	57%	28%
	Male (359)	12%	61%	27%
	Female (368)	17%	54%	29%
	Currently travel to work (251)	14%	66%	21%
	Currently work from home (216)	14%	49%	37%
Shop online for other items	Total (867)	10%	55%	35%
	Male (412)	7%	61%	32%
	Female (451)	12%	50%	38%
	Currently travel to work (304)	7%	64%	29%
	Currently work from home (243)	10%	46%	44%

Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before COVID?
Q: Do you currently work from home (Yes always or sometimes | No)? Base (in brackets)

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Cycling and walking intentions

Survey results indicate increased travel on foot for both utility and recreation compared with before COVID-19. The difference between those saying they will travel on foot more and those saying less is statistically *significant*. The apparent increase in cycling for recreation is offset by the apparent decrease in cycling for utility.

Slides above show that currently 18% of respondents walk or run less than they did before COVID, compared with 9% in the coming weeks on this slide; and 45% walk or run the same amount as before COVID compared with 55% to 65% in the coming weeks.

Active travel intentions by purpose
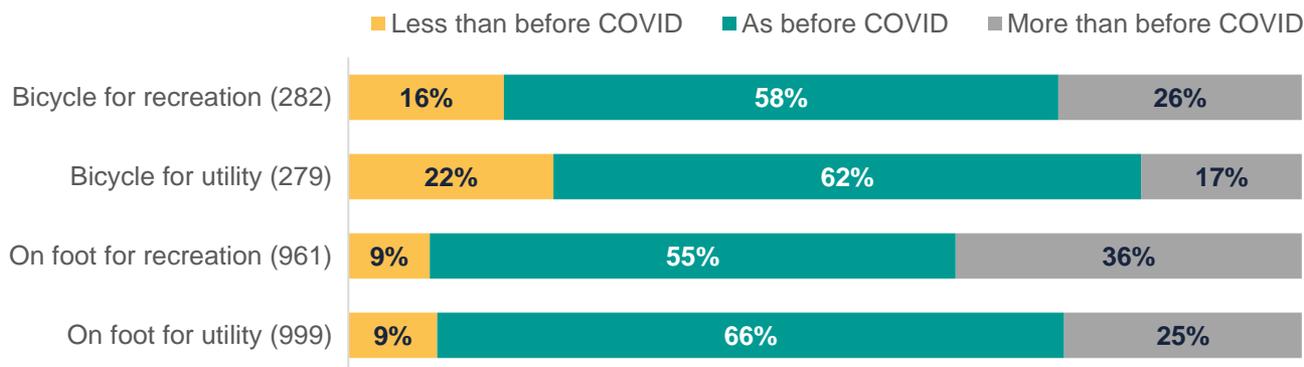
■ Less than before COVID ■ As before COVID ■ More than before COVID

|	Less than before COVID	As before COVID	More than before COVID
Bicycle for recreation (282)	16%	58%	26%
Bicycle for utility (279)	22%	62%	17%
On foot for recreation (961)	9%	55%	36%
On foot for utility (999)	9%	66%	25%

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

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Private car/van usage intentions

16% of respondents expect to travel by private car less in the coming weeks, compared to pre-COVID, and 13% say they will do so more, which almost balance each other out. Looking at public transport users and non-users and looking at different age groups, there is a convergence onto travelling by car/van the same amount as before COVID, *significantly* so amongst the 35-64 and 65+ age groups having both increased from 58% in wave 4.

Car / van usage intentions over the coming weeks

■ Less than before COVID ■ As before COVID ■ More than before COVID

Category	Less than before COVID	As before COVID	More than before COVID
Travel by car/van (999)	16%	71%	13%
Public transport user (445)	21%	62%	17%
Public transport non-user (554)	12%	78%	10%
Age 16-34 (322)	20%	59%	22%
Age 35-64 (461)	15%	77%	8%
Age 65+ (209)	15%	76%	10%

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

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Public transport usage intentions

A *significantly* greater proportion of respondents say they will travel by bus and train less in coming weeks than before COVID, compared with those who say they will do so more. This is true for both modes and across all ages (as it was in waves 3 and 4). The age 16-34 and 35-64 groups have changed intentions more than the 65+ age group since wave 4, with *significantly* fewer respondents saying they will use the train less than they did before COVID.

Public transport usage intentions over the coming weeks
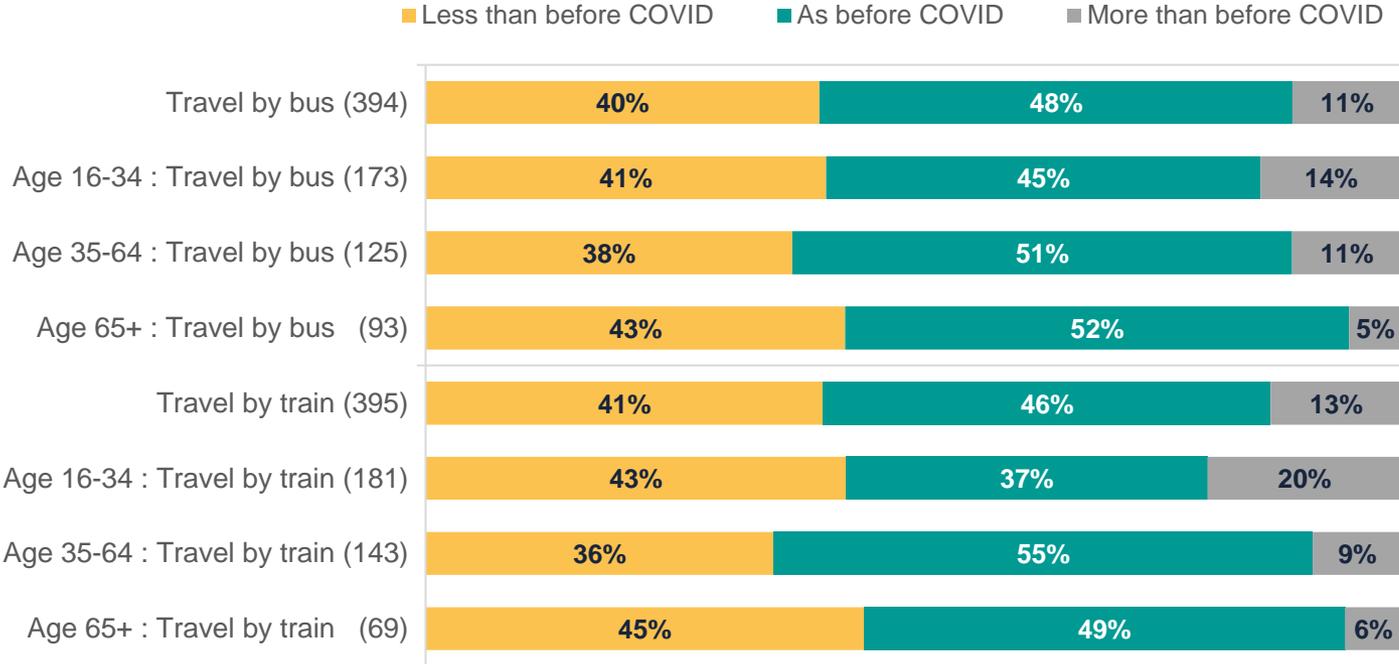
■ Less than before COVID   ■ As before COVID   ■ More than before COVID

|	Less than before COVID	As before COVID	More than before COVID
Travel by bus (394)	40%	48%	11%
Age 16-34 : Travel by bus (173)	41%	45%	14%
Age 35-64 : Travel by bus (125)	38%	51%	11%
Age 65+ : Travel by bus (93)	43%	52%	5%
Travel by train (395)	41%	46%	13%
Age 16-34 : Travel by train (181)	43%	37%	20%
Age 35-64 : Travel by train (143)	36%	55%	9%
Age 65+ : Travel by train (69)	45%	49%	6%

Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before COVID?
Base (in brackets): Public transport user at least once a month before lockdown, excluding 'I never do this' responses for the specific mode.

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Alternatives to public transport

64% of public transport users who said they would travel by bus or rail less in the coming weeks said that they would use the internet instead, this is a *significant* jump from 24% who stated this in wave 4 and *significantly* more than the 45% who said they would travel shorter distances.

The proportion of respondents who said they will travel shorter distances also increased *significantly* compared to the previous wave (17%), while those intending to use other types of transport remained steady at 21%.

More respondents gave multiple alternative options than in previous waves.

Public transport users alternative options in the coming weeks

68%	Travel less often
64%	Use the internet or phone
45%	Travel shorter distances
21%	Use other types of transport
5%	Don't know

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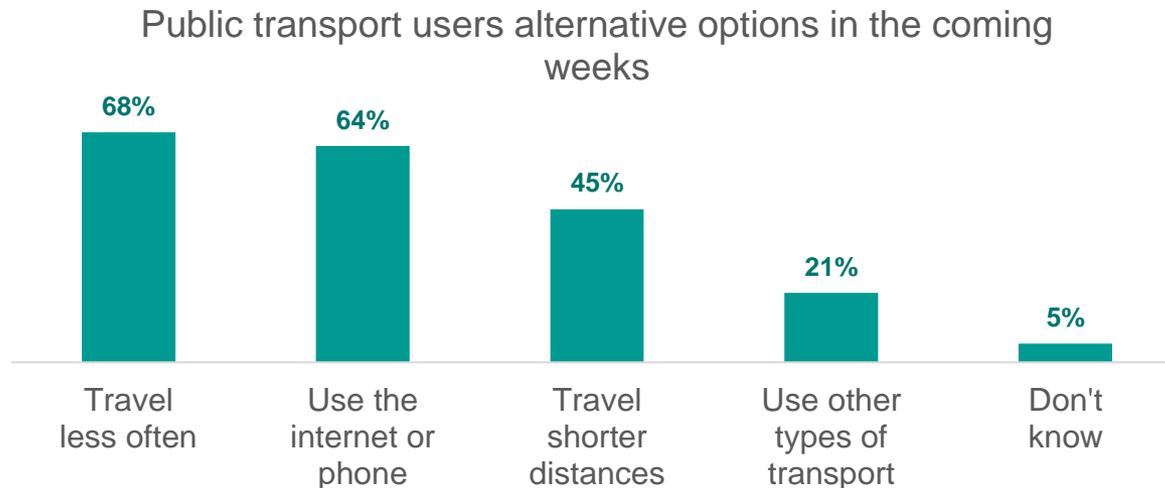
Concerns about public transport use

There appears to be more concern amongst people who expect to use public transport in the coming weeks than there was in wave 4; not at all concerned has dropped from 53% to 43% while very concerned has increased *significantly* from 5% to 16%. *Significantly* fewer respondents aged 16-34 are very concerned than in the other age groups.

Concerns about public transport usage in the coming weeks
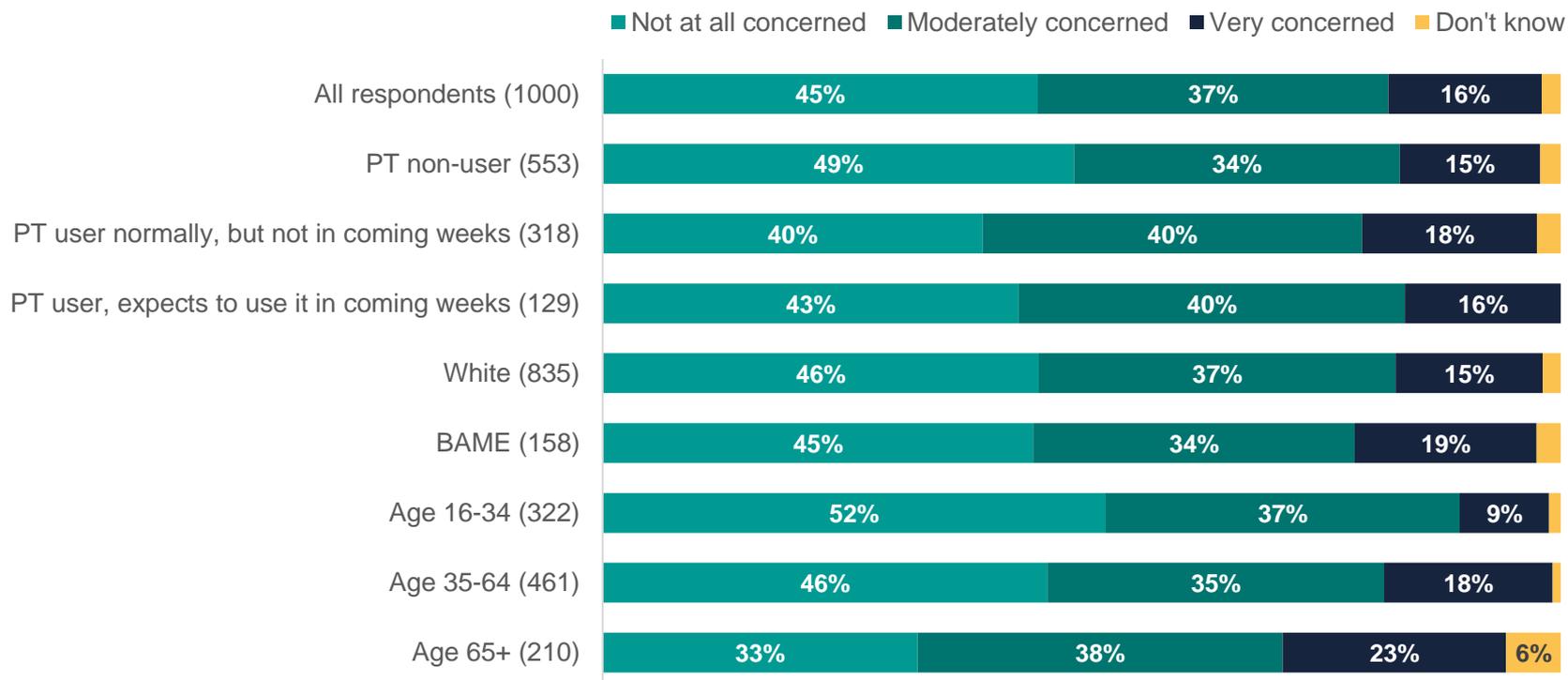
■ Not at all concerned ■ Moderately concerned ■ Very concerned ■ Don't know

	Not at all concerned	Moderately concerned	Very concerned
All respondents (1000)	45%	37%	16%
PT non-user (553)	49%	34%	15%
PT user normally, but not in coming weeks (318)	40%	40%	18%
PT user, expects to use it in coming weeks (129)	43%	40%	16%
White (835)	46%	37%	15%
BAME (158)	45%	34%	19%
Age 16-34 (322)	52%	37%	9%
Age 35-64 (461)	46%	35%	18%
Age 65+ (210)	33%	38%	23% / 6%

Q: In relation to COVID, would you be concerned about using public transport over the coming weeks? Q: How frequently did you travel by train and by bus before COVID? Q: Over the coming weeks how will you travel for the following journeys? Base (in brackets)

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Home working & future commuting demand

Working from home before COVID-19

Before COVID-19, 20% of workers had worked from home at least occasionally and 8% did this 3 days per week or more often. Rail users and rail commuters were *significantly* more likely to have worked from home before the pandemic. There are no *significant* differences for other user groups or demographic characteristics.

Frequency of working from home before COVID-19, by transport usage

Legend: ■ Never ■ Leess than once a week ■ 1 day/week ■ 2 days/week ■ 3+days/week

Group	Never	Less than once a week	1 day/week	2 days/week	3+days/week
All respondents (623)	80%	3%	5%	3%	8%
Train users (174)	70%	5%	9%	5%	11%
Bus users (164)	84%	4%	6%		5%
Train commuters (56)	61%	7%	13%	4%	16%
Bus commuters (75)	87%	7%		3%	4%
Car commuters (439)	82%	3%	6%		6%
Walk commuters (81)	88%	2%			7%
Cycle commuters (12)	92%	8%			

Q. How many days a week did you normally work from home before COVID? Base: all in employment before Covid (623)

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Working from home before COVID-19

Before COVID-19, West Yorkshire residents worked from home 0.46 days a week, on average. Train commuters in the sample report substantially higher home working, although the difference is not statistically *significant*. There are no statistically *significant* differences between any of the groups analysed.

Average days a week worked from home, before COVID-19

Group	Days
All respondents (623)	0.46
Train commuters (56)	0.86
Bus commuters (75)	0.22
Car commuters (439)	0.36
Walk commuters (81)	0.41
Male (298)	0.63
Female (322)	0.32
White (518)	0.43
BAME (100)	0.62
Bradford (141)	0.63
Calderdale (71)	0.27
Kirklees (100)	0.31
Leeds (220)	0.52
Wakefield (91)	0.39
16-34 (244)	0.33
35-64 (345)	0.50
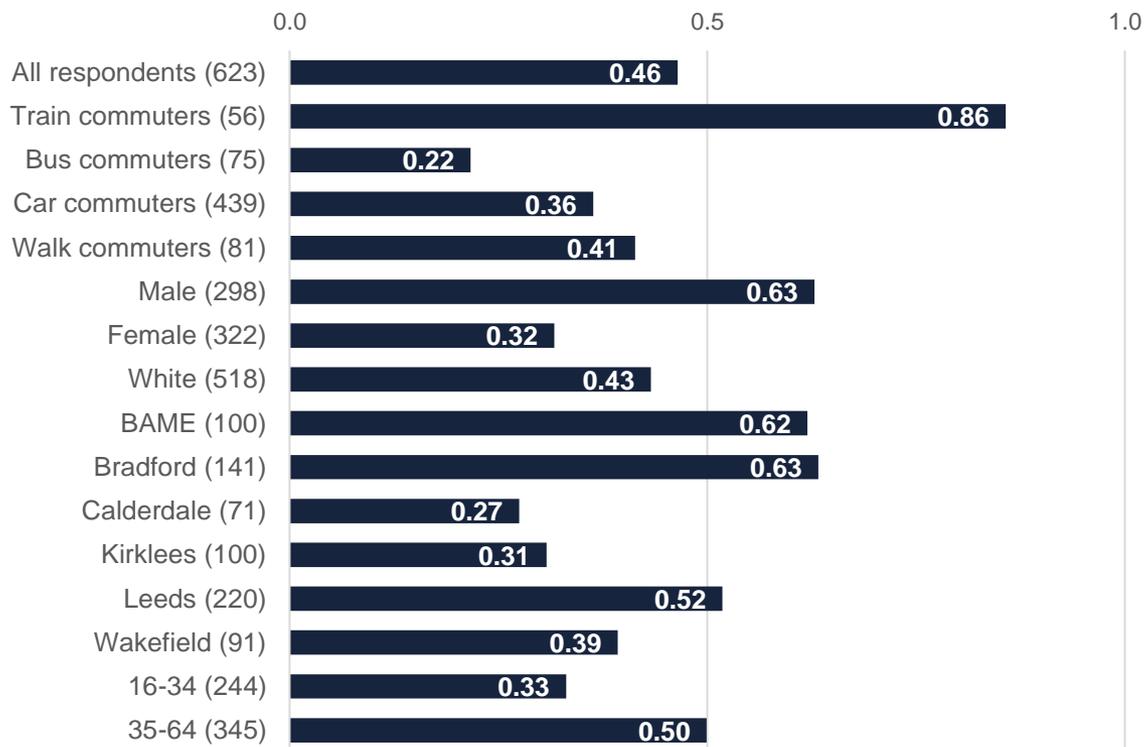
Q. How many days a week did you normally work from home before COVID? Less than once per week/0/1/2/3/4/5/6/7
Base: all in employment before Covid (623)
Note: for the calculation of an average, 'less than once a week' was assigned a numerical value of 0.25 days a week.
Note: the cycling commute sub-group was too small for the results to be significant (12 responses)

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Currently working from home

At the time of the survey, 30% of respondents reported working from home, with minimal differences between demographic and geographic groups. Interestingly, a *significantly* higher proportion of regular public transport users (pre-COVID-19) are working at home (38%) than those who didn't regularly use public transport before COVID-19 (23%).

Currently working from home

■ No ■ Sometimes ■ Yes

Group	No	Sometimes	Yes
All respondents (586)	57%	13%	30%
Male (281)	55%	15%	30%
Female (304)	59%	12%	30%
16-34 (247)	51%	15%	33%
35-64 (313)	61%	12%	26%
Bradford (134)	52%	12%	36%
Calderdale (66)	59%	17%	24%
Kirklees (98)	63%	16%	20%
Leeds (204)	52%	13%	35%
Wakefield (84)	68%	12%	20%
Public transport user (247)	47%	15%	38%
Non public transport user (339)	65%	12%	23%
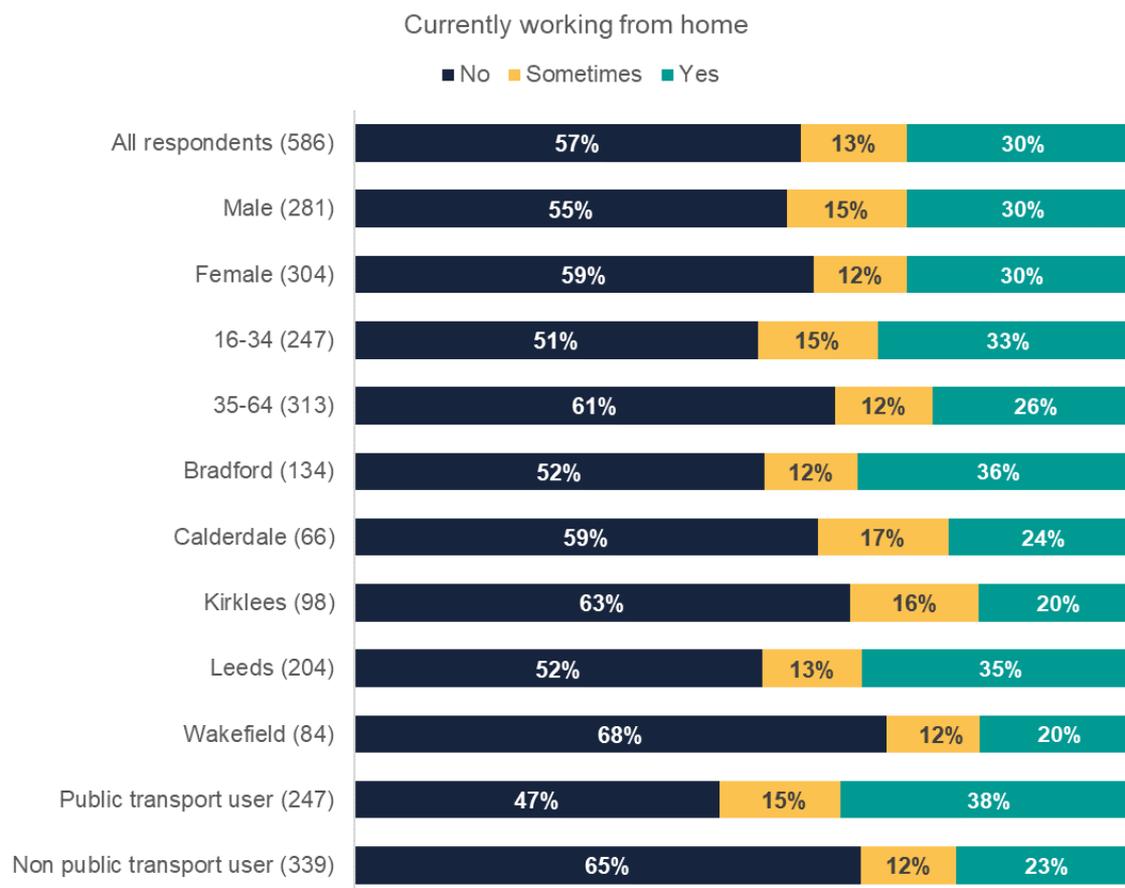
Q. In the current situation are you working from home? Base = 586. Note % on charts are rounded.

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Working from home sentiments

72% of respondents reported a positive home working experience compared to only 9% who thought this was a negative experience. Although not *statistically significant*, this is an increase on the previous wave, where 61% of respondents reported a positive home working experience.

Home working sentiments

Legend: ■ Very positive ■ Generally positive ■ Neutral ■ Generally negative ■ Very negative

Category	Very positive	Generally positive	Neutral	Generally negative	Very negative
All respondents (252)	37%	35%	19%	6%	4%
Male (126)	32%	37%	23%	5%	3%
Female (126)	43%	32%	15%	6%	4%
16-34 (120)	33%	38%	21%	8%	1%
35-64 (121)	40%	31%	18%	4%	6%
Non public transport user (120)	38%	31%	23%	4%	5%
Public transport user (132)	37%	38%	16%	3%	6%
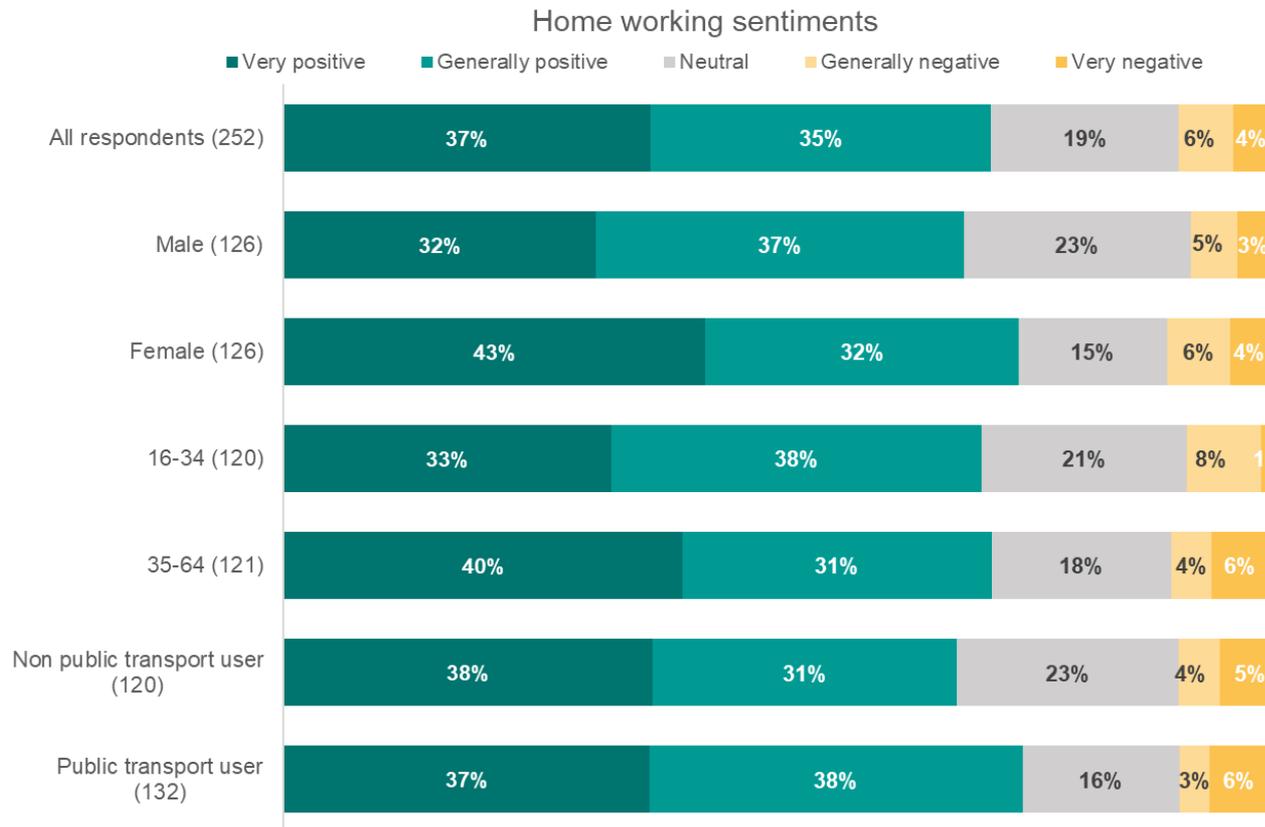
Q. How do you feel about working from home at the moment? Base = 252. Note % on charts are rounded.

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Working from home in the long term (I)

Over three quarters of respondents said that, in the long term, they are likely to work from home more often than before COVID; almost half (48%) said this would be very likely. There are no *statistically significant* differences in responses when comparing different demographic characteristics.

Working from home in the long term

Legend: ■ Very likely ■ Likely ■ Unlikely ■ Very unlikely ■ Don't know

Group	Very likely	Likely	Unlikely	Very unlikely	Don't know
All respondents (252)	48%	28%	13%	7%	4%
Male (126)	45%	29%	15%	7%	4%
Female (126)	52%	27%	11%	6%	4%
16-34 (120)	43%	37%	10%	8%	3%
35-64 (121)	55%	20%	17%	4%	4%
White (207)	53%	25%	11%	7%	4%
BAME (42)	29%	40%	19%	7%	5%
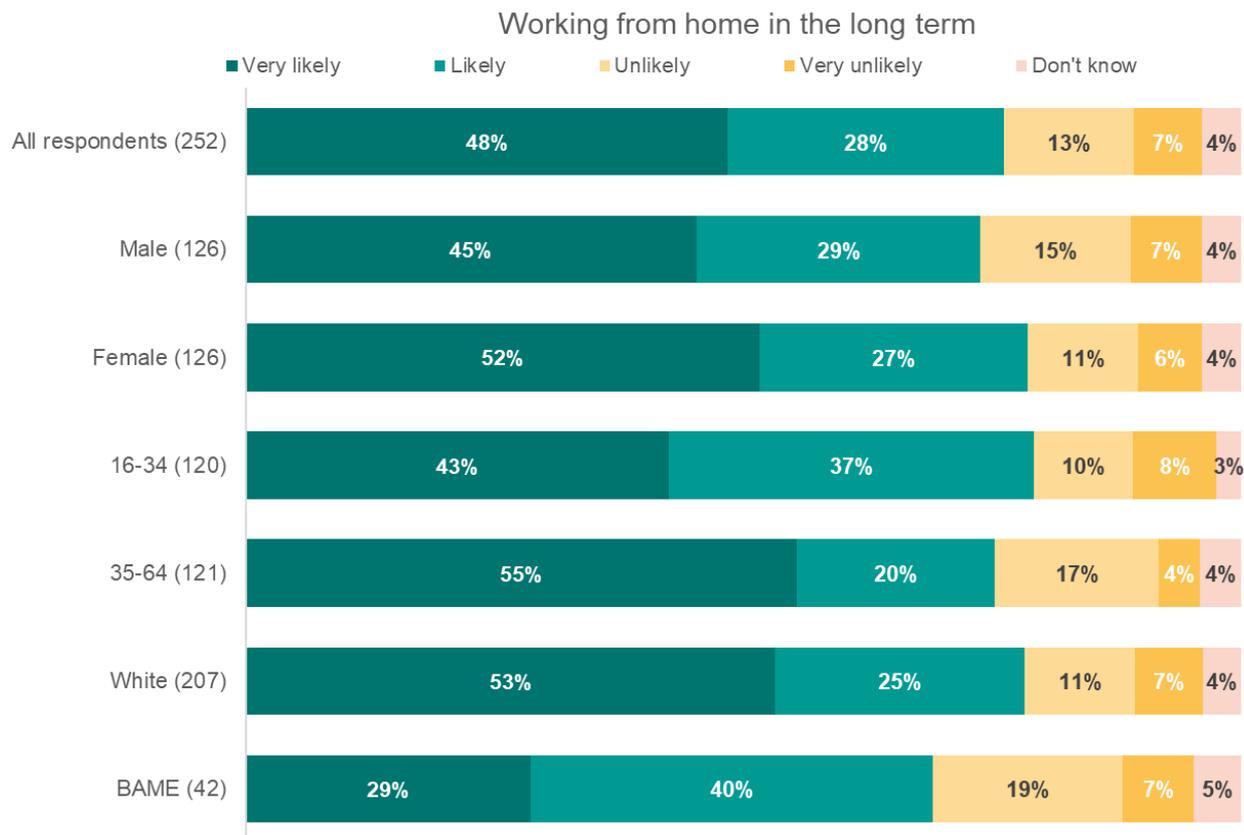
Q. In the long term, how likely are you to work from home more often than you did before COVID? Base = 252
Note % on charts are rounded.

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Working from home in the long term (II)

74% of respondents who never worked at home before COVID-19 reported that they are likely to work at home in the long term. 84% of respondents who worked at home sometimes pre-COVID-19 said its likely (59% said very likely) they will be working at home more often in the long term.

Working from home in the long term

■ Very likely　■ Likely　■ Unlikely　■ Very unlikely　■ Don't know

Work from home before COVID

	Very likely	Likely	Unlikely	Very unlikely	Don't know
Yes (32)	53%	19%	6%	6%	16%
Sometimes (68)	59%	25%	12%	4%	
No (136)	46%	29%	15%	7%	4%
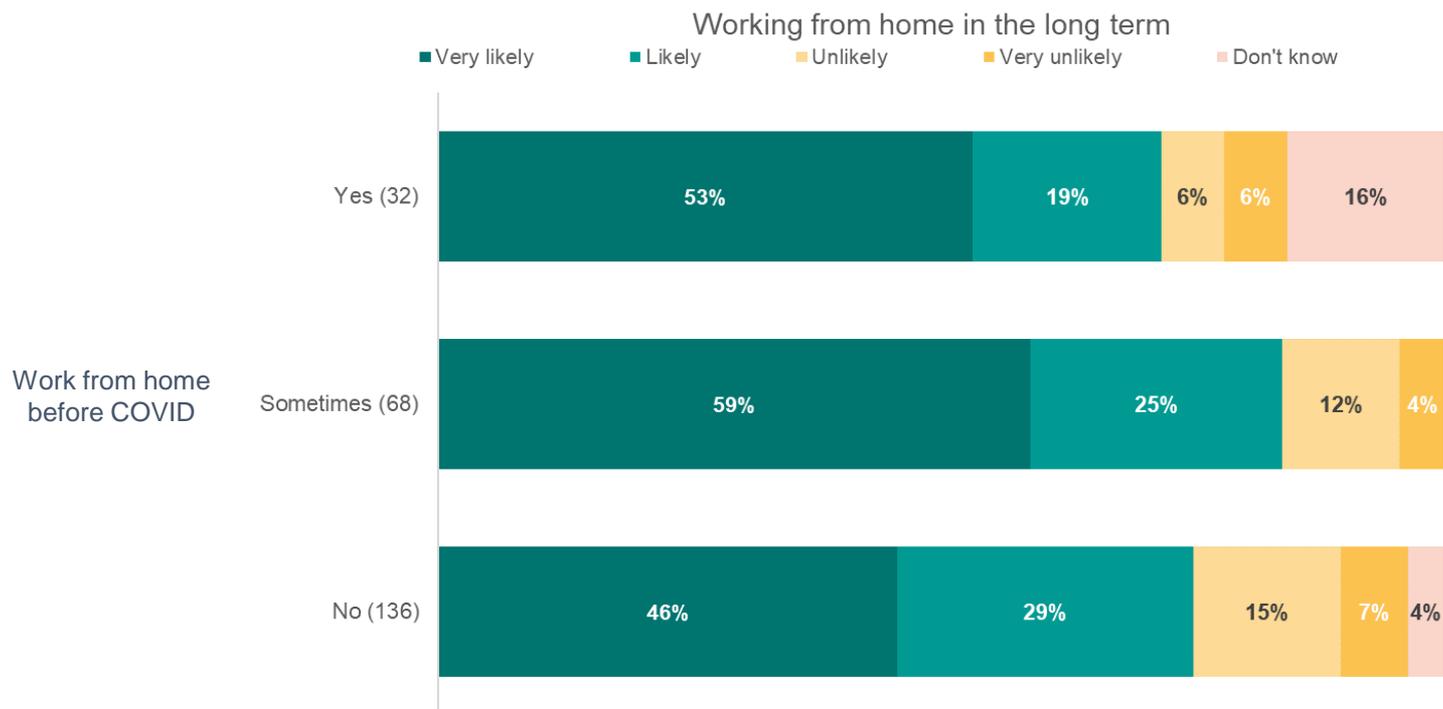
Q. In the long term, how likely are you to work from home more often than you did before COVID?
Q. Did you work from home before COVID? Base = 236
Note % on charts are rounded.

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Working from home in the long-term vs sentiments

Although, the majority of respondents said they have had a positive working from home experience and are likely they will be working from home more often long term, 8% think they will work at home more often in the future despite a negative experience.

Home Working Sentiments vs
Working at home long term
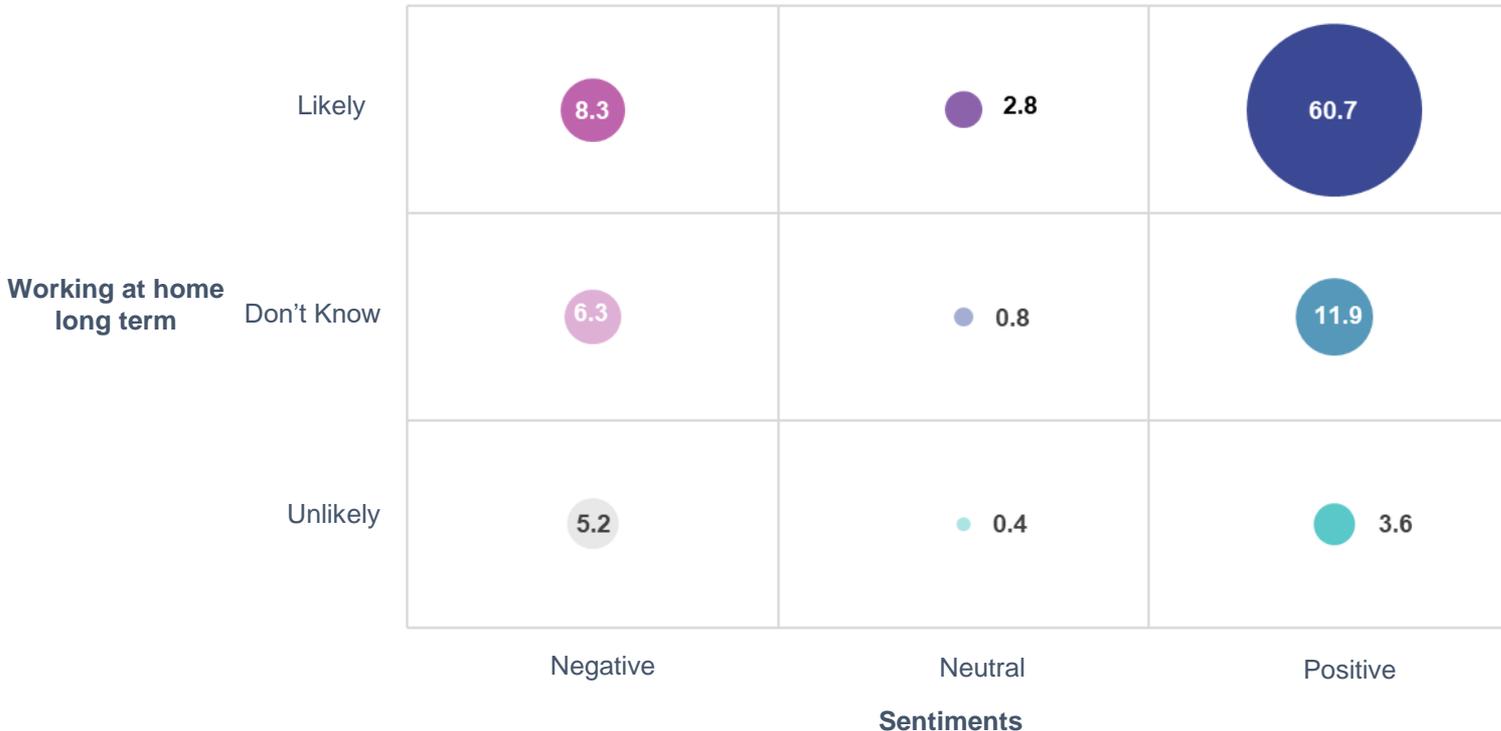
Working at home long term

Likely · Negative 8.3 · Neutral 2.8 · Positive 60.7

Don't Know · Negative 6.3 · Neutral 0.8 · Positive 11.9

Unlikely · Negative 5.2 · Neutral 0.4 · Positive 3.6

Negative · Neutral · Positive

Sentiments

**West Yorkshire** Combined Authority

Changes in travel to work frequency

Before COVID-19, West Yorkshire residents travelled to work 4.3 days a week on average. The current figure is substantially lower at 2.9 commuting days per week, reflecting the 30% of respondents who are working from home at present.

There are expectations to reduce commuting in the long term, relative to pre-pandemic, with figures suggesting a 17% reduction in trips to work on average. Rail users and rail commuters expect a *significantly* greater drop in the number of commuting trips in the long term than the general sample; also, those who did some work from home before the pandemic. Conversely, those who never worked from home pre-covid are *significantly* more likely to travel to work more often than the general sample.

Average number of days travelled to work per week, by group

■ Before COVID-19　■ Currently　■ In the long term

Group	Before COVID-19	Currently	In the long term
All respondents	4.3	2.9	3.6
Train users	4.1	2.1	3.1
Train commuters	3.8	1.4	2.7
Bus commuters	4.4	2.4	3.5
Car commuters	4.4	3.1	3.7
Walk commuters	4.3	3.1	3.7
Male	4.4	2.9	3.7
Female	4.2	2.8	3.4
White	4.2	2.9	3.5
BAME	4.4	2.9	3.8
Partially wfh before COVID-19	3.3	1.3	2.7
Did not wfh before COVID-19	4.5	3.4	4.0
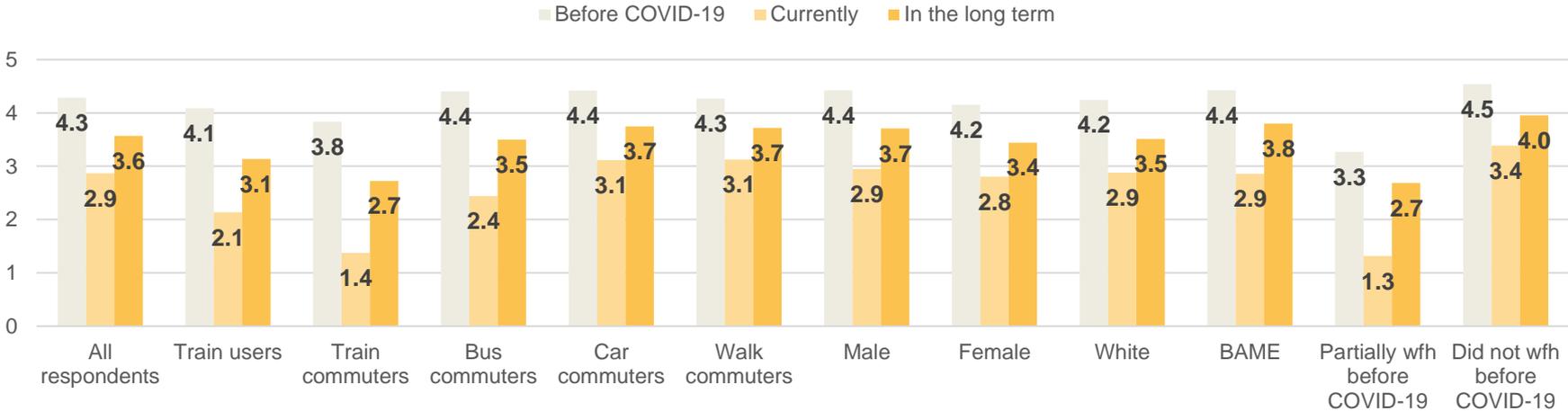
Q. Before COVID how many days a week did you normally travel to work? | Q. How many days a week do you currently travel to work? | TN63. In the long term, once COVID is no longer considered a problem, how many days per week do you think you will travel to work, roughly? (Less than once a week / 0/1/2/3/4/5/6/7)
Note: For the obtention of an average 'less than once a week' was assigned a numerical value of 0.25 days/week
Note: The cycling commuting sub-group was too small for the results to be significant (12 responses)

West Yorkshire Combined Authority

Changes in travel to work frequency

Respondents expect to reduce their weekly commuting trips by 17% relative to pre-COVID. The expected reduction in commuting trips is greater among train users and rail commuters, and much lower among those who never worked from home before COVID-19.

Drop off in days travelled to work in the long term vs pre-Covid
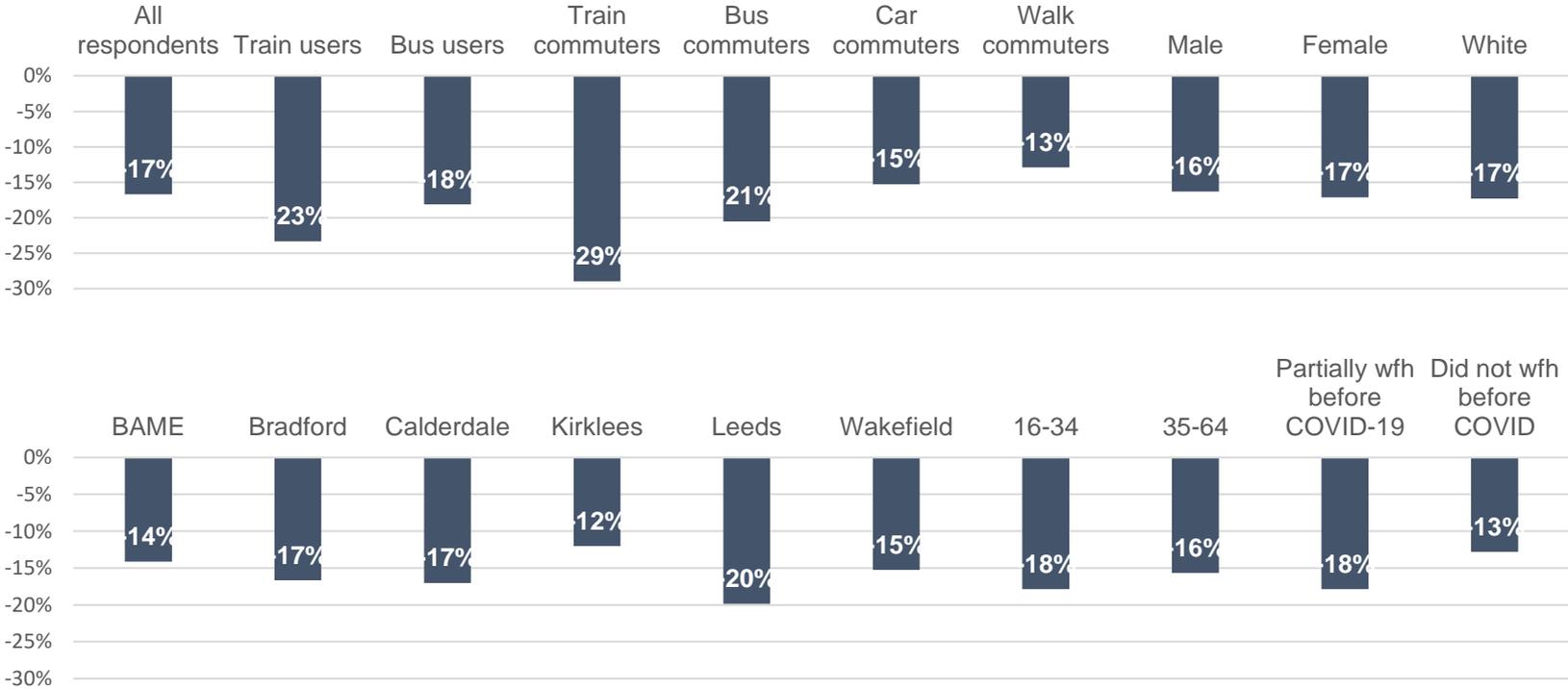
Q. Before COVID how many days a week did you normally travel to work? | Q. In the long term, once COVID is no longer considered a problem, how many days per week do you think you will travel to work, roughly? (Less than once a week / 0/1/2/3/4/5/6/7)
**Note**: For the obtention of an average, 'less than once a week' was assigned a numerical value of 0.25 days/week
Note: The cycling commuting sub-base was too small for results to be significant (12 responses)

West Yorkshire Combined Authority

Future commuting demand (I)

78% of those in employment commuted at least 4 days a week before COVID-19. However, expectations in the long term are for less travel to work, with 50% of respondents (and a significantly higher proportion of rail commuters and rail users) contemplating fewer than 4 commutes a week.

Travel to work in the long term, by transport usage
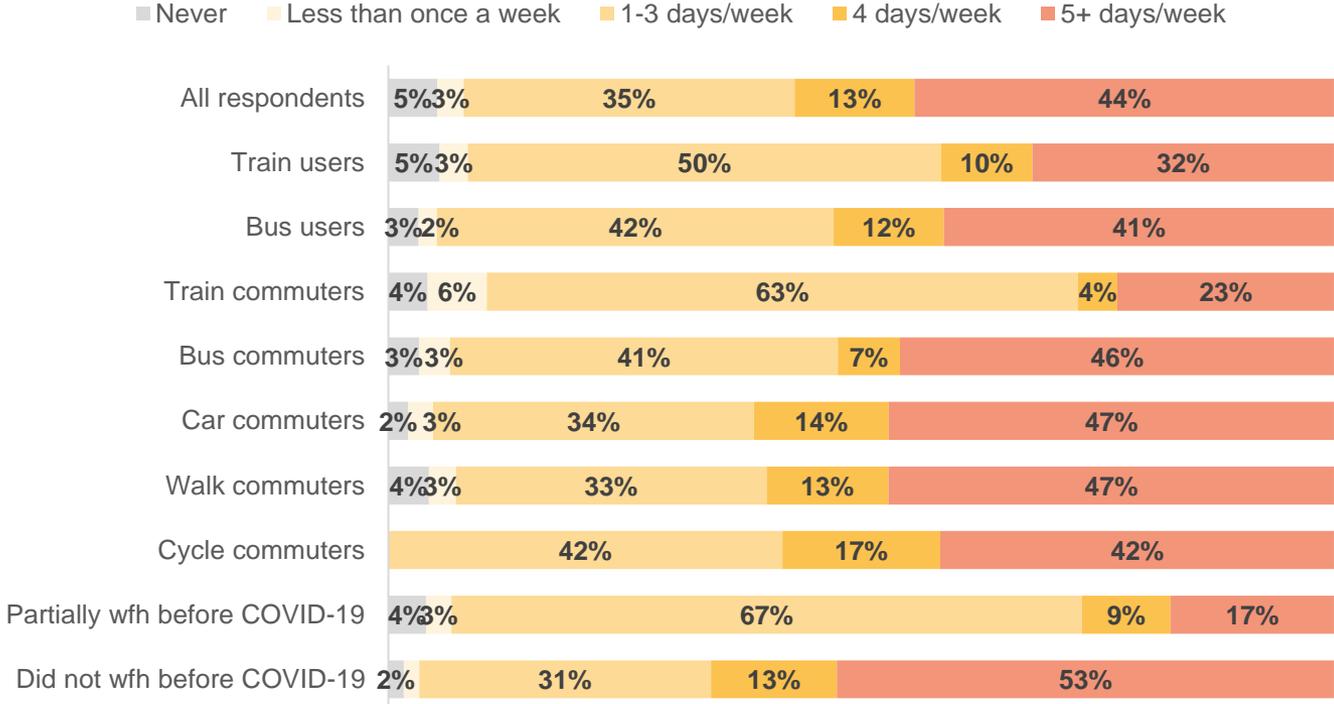
Legend: ■ Never ■ Less than once a week ■ 1-3 days/week ■ 4 days/week ■ 5+ days/week

Category	Never	Less than once a week	1-3 days/week	4 days/week	5+ days/week
All respondents	5%	3%	35%	13%	44%
Train users	5%	3%	50%	10%	32%
Bus users	3%	2%	42%	12%	41%
Train commuters	4%	6%	63%	4%	23%
Bus commuters	3%	3%	41%	7%	46%
Car commuters	2%	3%	34%	14%	47%
Walk commuters	4%	3%	33%	13%	47%
Cycle commuters			42%	17%	42%
Partially wfh before COVID-19	4%	3%	67%	9%	17%
Did not wfh before COVID-19	2%		31%	13%	53%

Q. Before COVID how many days a week did you normally travel to work? | Q. In the long term, once COVID is no longer considered a problem, how many days per week do you think you will travel to work, roughly? (Less than once a week / 0/1/2/3/4/5/6/7)
**Note**: The cycling commuting sub-base was too small for results to be significant (12 responses)

West Yorkshire Combined Authority

Future commuting demand (II)

Most respondents within each commuting band will stick to their previous commuting habits in the long term, although approximately a third of those travelling to work 4 days a week or more before the pandemic expect to reduce their amount of commuting, the most frequent option being 1-3 days a week.
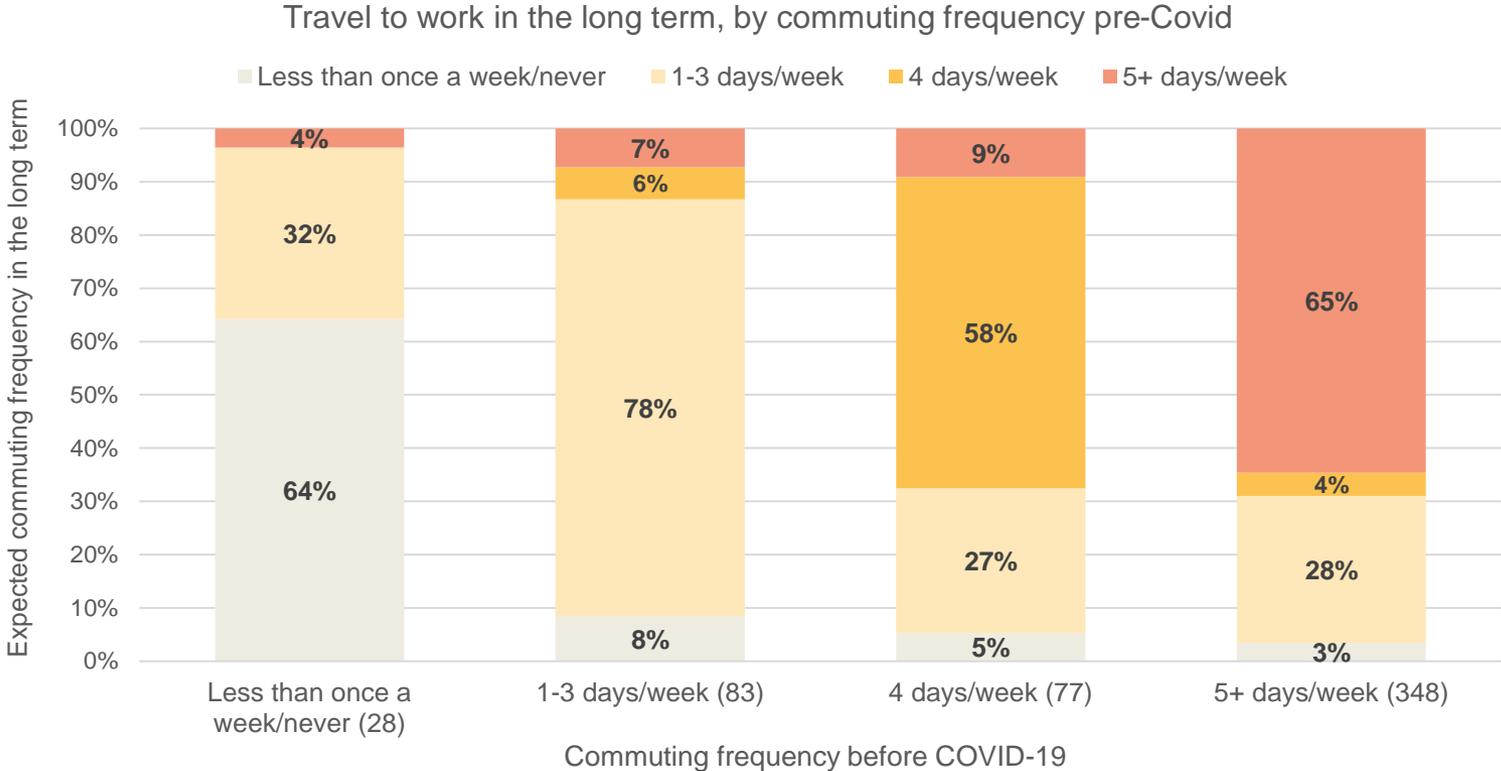
Travel to work in the long term, by commuting frequency pre-Covid

■ Less than once a week/never ■ 1-3 days/week ■ 4 days/week ■ 5+ days/week

Expected commuting frequency in the long term

	Less than once a week/never (28)	1-3 days/week (83)	4 days/week (77)	5+ days/week (348)
5+ days/week	4%	7%	9%	65%
4 days/week		6%	58%	4%
1-3 days/week	32%	78%	27%	28%
Less than once a week/never	64%	8%	5%	3%

Commuting frequency before COVID-19

West Yorkshire Combined Authority

Future commuting demand (III)

A notable reduction in the 5+ days a week commute is observed in the long term, in parallel with an increase in the 1-3 days of commute. This shift is especially pronounced for rail commuters, and the change is statistically significant –also for rail users. No *significant* differences have been found for other user or demographic groups.

Frequency of commuting, before COVID-19 vs long term

Legend: 5+ days a week | 4 days a week | 1-3 days a week | Less than once a week | Never

	Before Covid	Long term	Before Covid	Long term	Before Covid	Long term	Before Covid	Long term	Before Covid	Long term
Never	1%	3%	5%	6%	1%	3%	2%	3%	0%	3%
Less than once a week	16%	35%	23%	63%	15%	41%	16%	34%	15%	33%
1-3 days a week	14%	13%	14%	—	13%	7%	15%	14%	17%	13%
4 days a week	—	—	—	4%	—	—	—	—	—	—
5+ days a week	64%	44%	54%	23%	69%	46%	66%	47%	62%	47%
	All respondents (577)		Train commuters (48)		Bus commuters (61)		Car commuters (380)		Walk commuters (70)	

West Yorkshire Combined Authority

Respondents' demographic profile

Survey respondent demographics (I)

Age	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
16-34	322	32.2	32.4
35-64	461	46.1	46.8
65+	210	21.0	20.8
Prefer not to say	7	0.7	-
Total	**1000**	**100.0**	**100.0**

ONS 2018 mid-year population estimates

Sex	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
Male	475	47.5	49.2
Female	519	51.9	50.8
Other	3	0.3	-
Prefer not to say	3	0.3	-
Total	**1000**	**100.0**	**100**

ONS 2018 mid-year population estimates

District	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
Bradford	222	22.2	22.2
Calderdale	92	9.2	9.2
Kirklees	189	18.9	18.9
Leeds	345	34.5	34.5
Wakefield	152	15.2	15.1
Total	**1000**	**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 the survey sample is representative of the West Yorkshire population.

Ethnic background	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
White	835	83.5	81.8
Ethnic Minority	158	15.8	18.2
Prefer not to say	7	0.7	
Total	**1000**	**100.0**	**100.0**

ONS 2011 Census

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Survey respondent demographics (II)

Working situation	Survey responses (count)	Survey responses (%)
In employment	605	60.5
In full time education	53	5.3
Both	18	1.8
Neither	323	32.3
Prefer not to say	1	0.1
Total	1000	100.0

Employment and education status	Survey responses (count)	Survey responses (%)
Working or furloughed	566	56.6
Wholly retired from work.	245	24.5
Unemployed including laid off.	30	3.0
Long term sick or disabled.	34	3.4
Looking after house and family / full time carer	43	4.3
In full time education	24	2.4
In full time education and working	30	3.0
Other	26	2.6
Prefer not to say.	2	0.2
Total	1000	100.0

Car, or other motor vehicle, available for use when needed	Survey responses (count)	Survey responses (%)
Yes	834	83.4
No	116	11.6
Sometimes	41	4.1
Don't know	9	0.9
Total	1000	100.0

Bicycle available for use when needed	Survey responses (count)	Survey responses (%)
Yes	434	43.4
No	556	55.6
Don't know	10	1.0
Total	1000	100.0

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

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

West Yorkshire Combined Authority