COVID-19 Transport Recovery Survey Wave 8

West Yorkshire Research & Intelligence Team

November 2022

Introduction

Started in June 2020, this survey is aimed at tracking attitudes and behaviours in relation to transport in order to understand COVID-19 recovery trends and challenges.

Fieldwork (wave 8):	11th - 24th October 2022 (before half term)
Sample:	Representative sample of the West Yorkshire population of 1,000 West Yorkshire residents with quotas for: - Age - Gender - District - Ethnicity
Survey Method:	10-minute telephone interview
Report structure:	Perceptions of Public Transport Changes in Travel Behaviour (mode shift) Cycling Home Working & Commuting Cost of Living Crisis

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 terms 'public transport user, bus user and train user' are used throughout the report based on their response to the mode choice question.

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.*

Executive summary (I)

Perceptions of Public Transport

- Concern about public transport use in relation to COVID-19 has fallen *significantly* since June 2020; 62% now say they are not at all concerned about using public transport in relation to COVID-19, although 1 in 13 still report being very concerned.
- Although all age groups report being less concerned about using public transport in relation to COVID-19 compared to the last wave, the degree of concern still increases with age.
- When asked about feelings towards using the bus or train in general, train was viewed much more positively; respondents were twice as likely to have a positive view of the train than a negative view, whilst bus received an equal balance of positive and negative views.
- Respondents who use the bus mode were *significantly* more likely to feel positive about it than those who do not.
- When asked the reasons for negative views, the stand-out reason for both bus and train was reliability and punctuality.

Changes in Travel Behaviour

- When asked about the main way workers travel to work now and in a year's time, results indicate little change, with 73% of workers opting for the car.
- For grocery shopping there is further stability, with over 80% of shoppers choosing the car for their main shop, and around half choosing the car for local shopping alongside half walking, both now and in future.

Executive summary (II)

Changes in Travel Behaviour continued…

- Change from walking to car use for exercise is reported, while journeys to city centres see movement from car to rail.
- People expect to travel more in a year's time than they do now, with those saying they never leave home declining across all journey purposes.

Cycling

- Overall, 1 in 5 say they are confident cycling in most or all situations, whilst in contrast 2 in 5 say they aren't confident cycling, although those who have access to a bike are much more confident than those that don't
- Men are significantly more likely to feel confident cycling than women, and cycling confidence decreases with age

Home Working & Commuting

- Fewer than 1 in 10 workers are now working at home exclusively; 59% of workers now report not working at home at all, whilst 31% say they work at home sometimes, adopting a hybrid working pattern.
- More than half of hybrid workers, equivalent to around 1 in 6 of all workers report commuting the full-time-equivalent of between 1 and 3 days a week.
- Younger workers are significantly less likely to not work at home at all compared to older workers.
- Home working sentiments remain consistently positive (82% reported a positive experience in this wave), with over half of those home working or hybrid working reporting a very positive home working experience, a rise from 22% in June 2020.

Executive summary (II)

Home Working & Commuting continued…

- When asked about working flexibility in the future, views were polarised; around 4 in 10 of workers expect to either always, or very often have flexibility over home working, hours or commuting times, whilst around a third said they would never have this flexibility.
- Between this survey and the last one (April/May 2022), 3.3% fewer workers reported exclusively working from home, whilst 8.6% more workers reported exclusively working in the office.
- When asked about changes to working locations a year from now, the results indicate a limited degree of further change, with a slight reduction in exclusive home working (-1.4%) and small increase in hybrid working (2.4%).
- Similarly, when asked about the commuting frequency in a year's time, the results show only subtle changes from the current situation, with a slight net increase in commuting.

Cost of Living Crisis

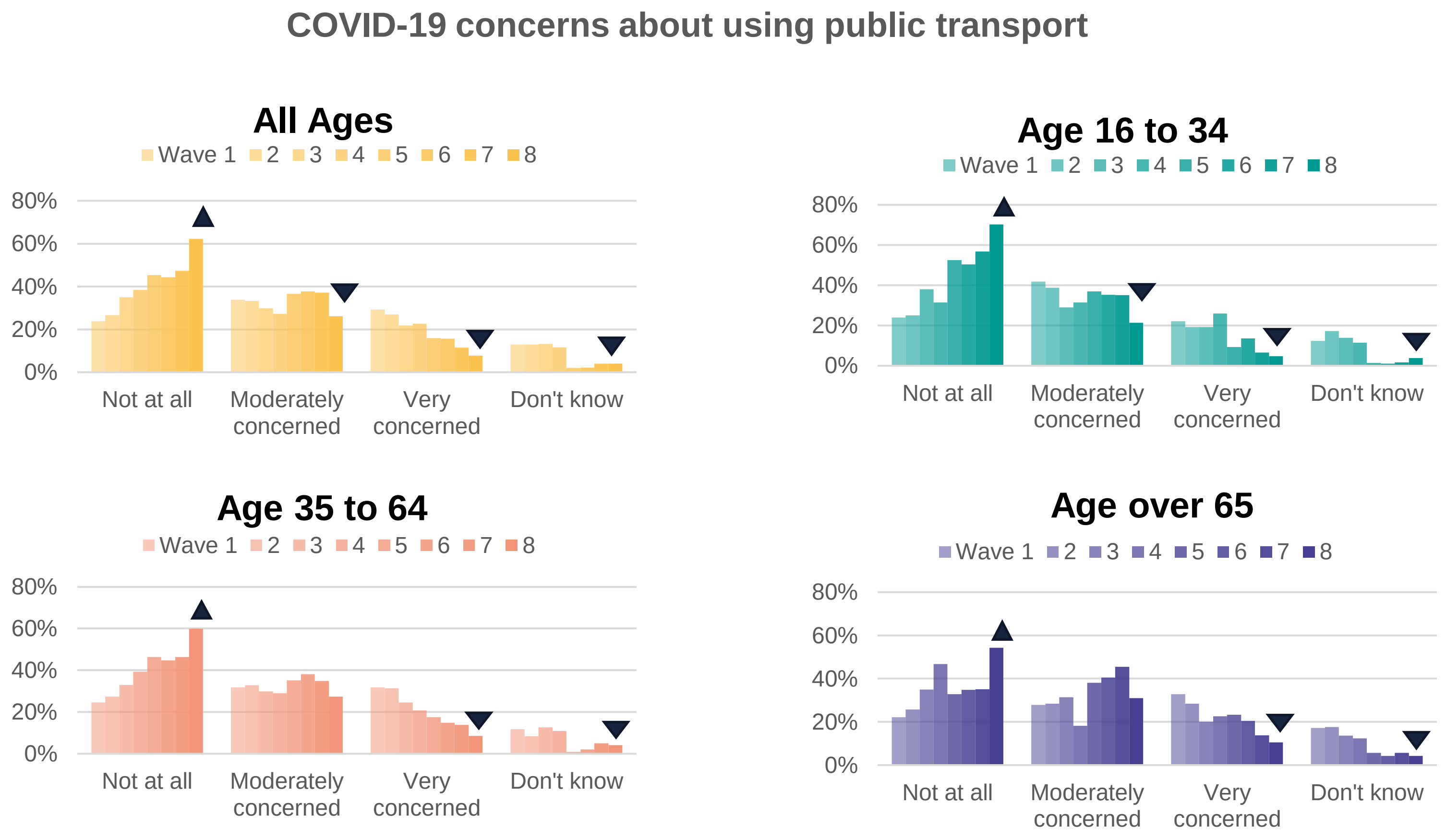
- When asked about any expected change in travel specifically in response to the cost-of-living crisis, 36% of people said they would walk more, 1 in 5 said they would use motorised modes less, and more than 1 in 4 said they would reduce taxi use.
- Although the majority of respondents said they wouldn’t make changes to their reasons for travel in relation to the cost-of-living crisis, those that would make changes, journeys for socialising or leisure and trips into city centres (excluding work) were most likely to be reduced.

Perceptions of Public Transport

Concerns about public transport use in relation to COVID-19

Concern about public transport use in relation to COVID-19 has fallen *significantly* since survey wave 1 (June 2020); 62% now say they are not at all concerned about using public transport in relation to COVID-19.

As with previous survey waves, the degree of concern about using public transport in relation to COVID-19 increases with age; 70% of 16-34 year olds said they were not at all concerned, but this figure falls to 54% of those aged 65 and over.



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

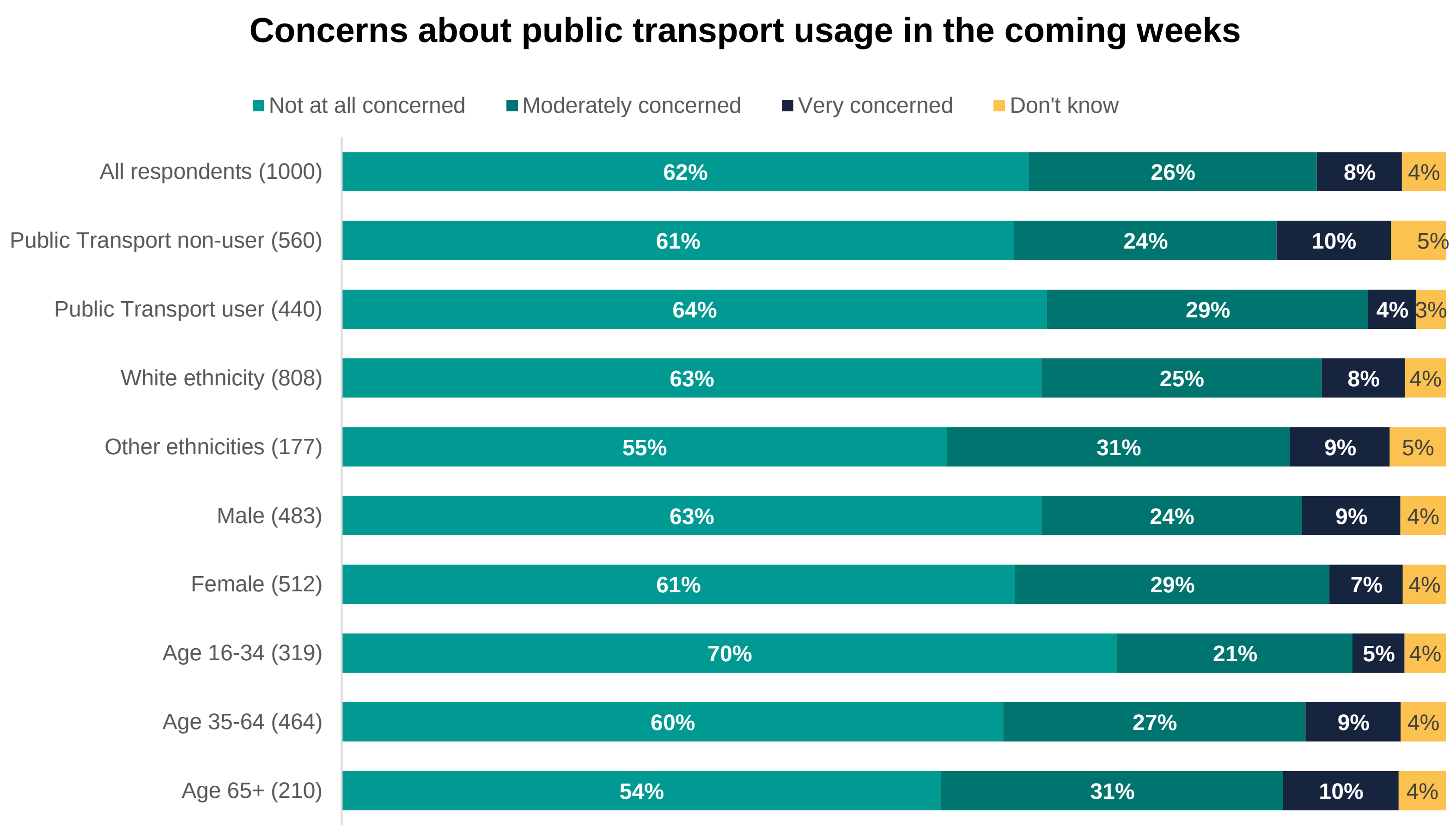
Q: In relation to COVID, how concerned are you about using public transport? Base: All Respondents.
Previous waves asked how concerned would you be about using public transport in the coming weeks, & waves 1 to 4 did not specifically mention COVID in the question.

Concerns about public transport use in relation to COVID-19

Overall, whilst the majority of people now say they are not at all concerned about using public transport in relation to COVID-19, 1 in 13 still say they are very concerned.

Regular public transport users continue to be less concerned than those who do not use public transport.

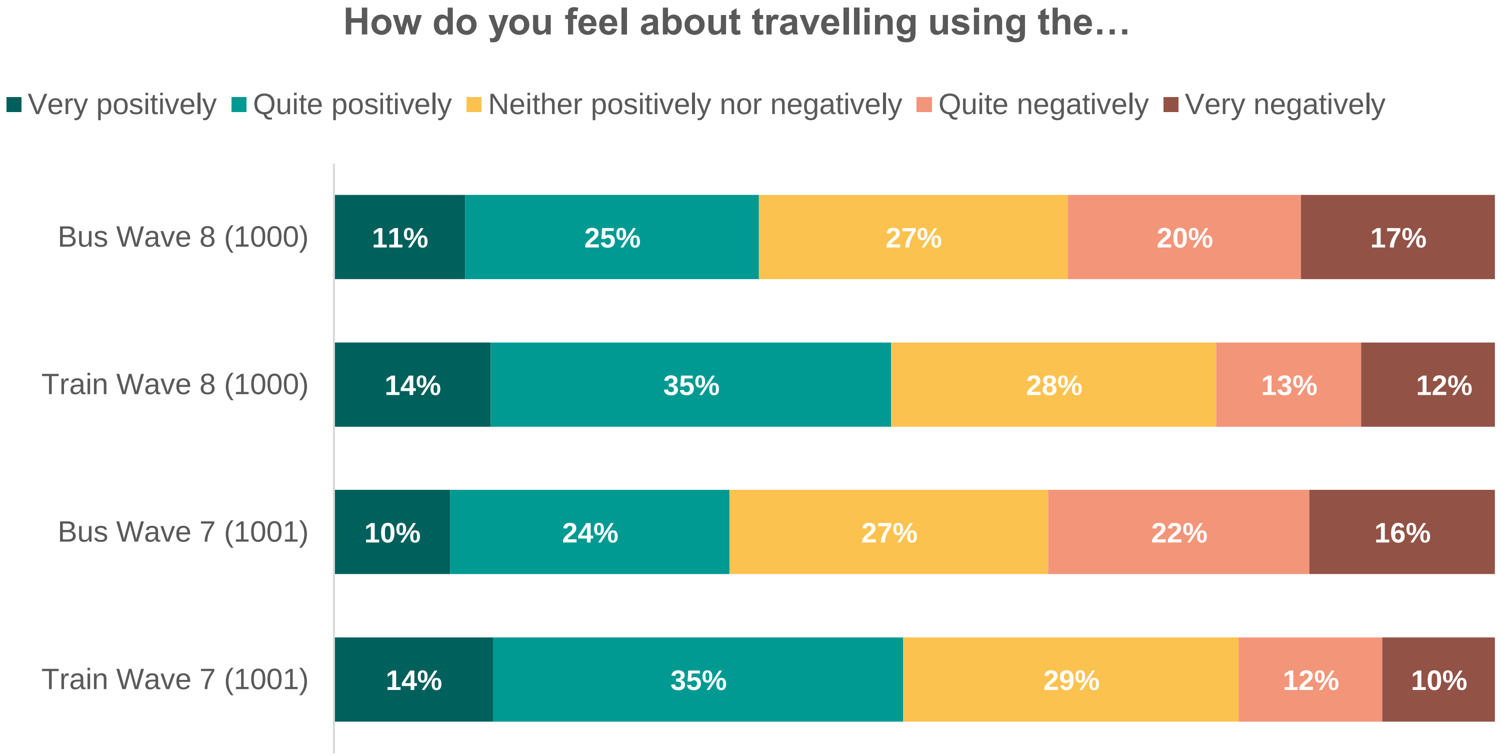
Women are still slightly more concerned than men, and ethnic minority groups are more concerned than white respondents.

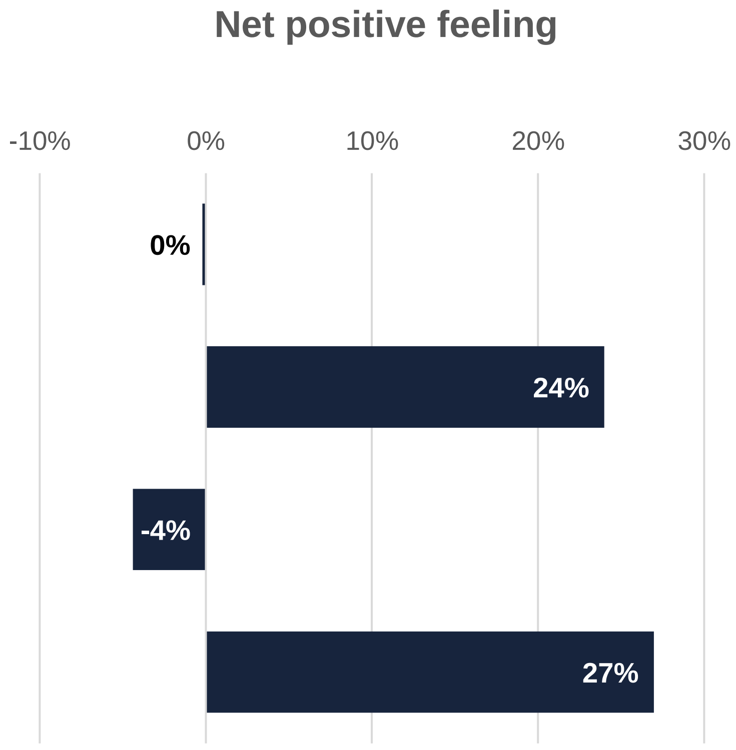


Q: In relation to COVID, would you be concerned about using public transport over the coming weeks?
Q: How frequently did you travel by train and by bus before COVID? Q: Over the coming weeks how will you travel for the following journeys? Base (in brackets)

Perceptions of the bus and train – wave comparison

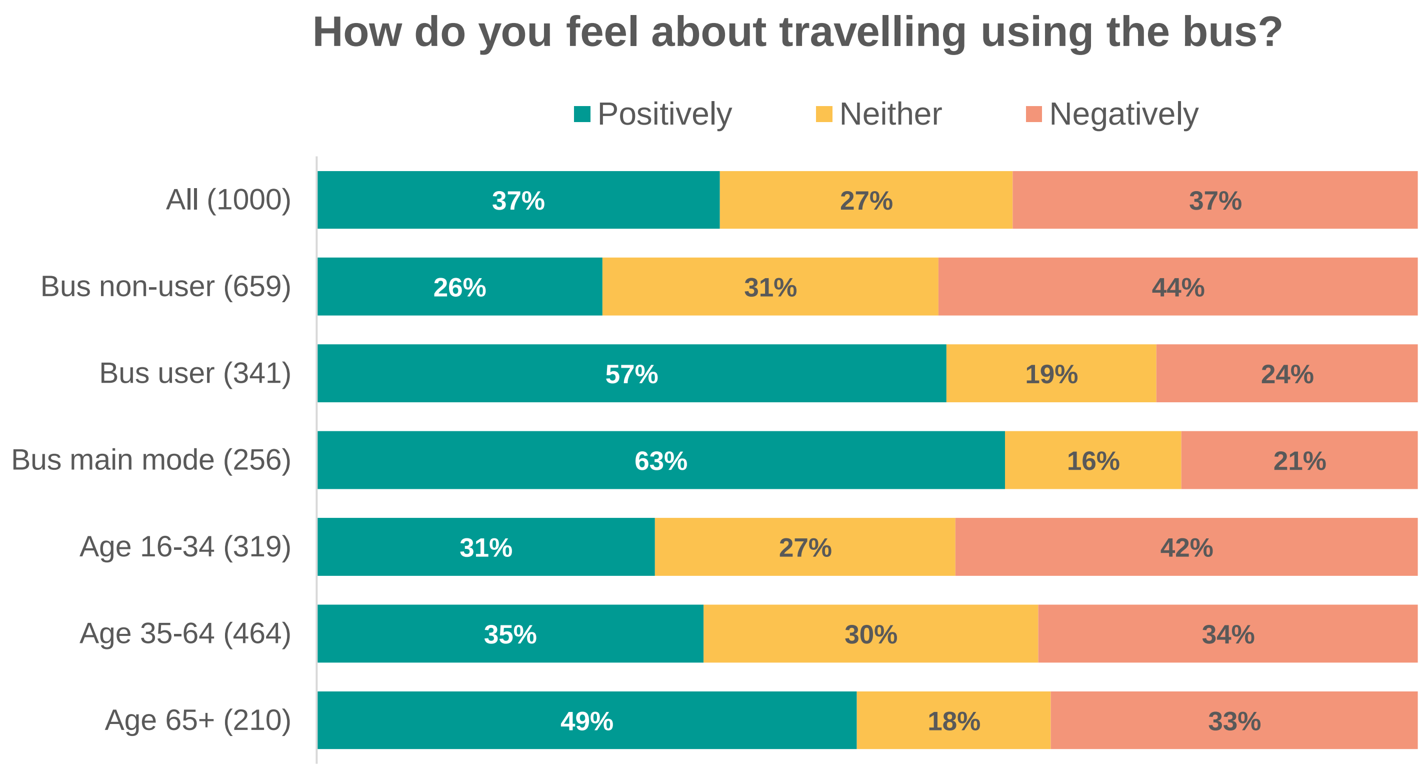
Overall, respondents reported feeling more positively about using the train than using the bus; respondents were twice as likely to have a positive view of the train than a negative view (consistent with the previous wave), whilst positive and negative views of bus were equally balanced. Respondents were slightly more positive about using the bus than in wave 7 but the improvement is not statistically *significant*.





Q: Currently how positively or negatively do you feel about travelling using the following modes (Bus, Train)? Base in brackets

Perceptions of the bus



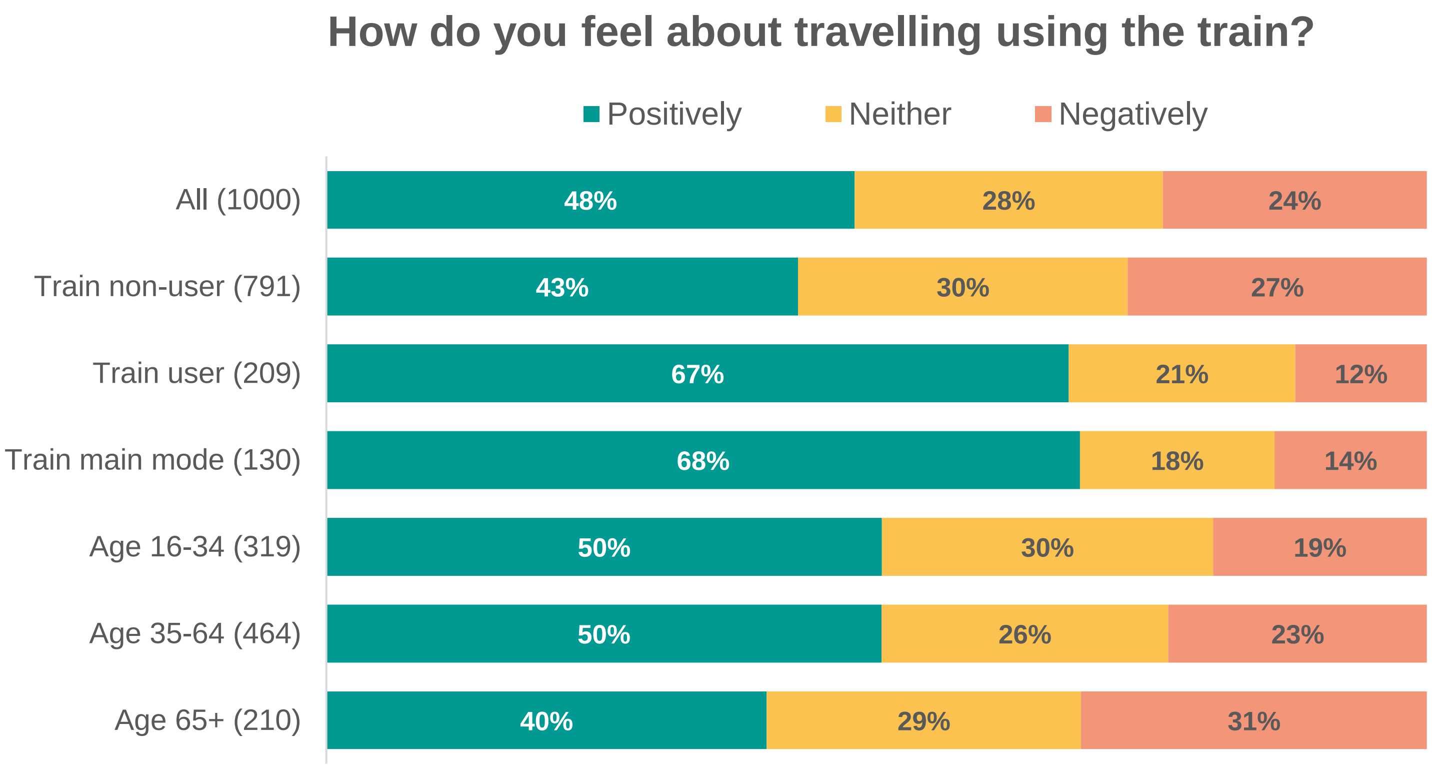
Overall, 37% of respondents reported feeling positively about the bus, whilst an equal number also felt negatively.

Respondents who use the bus are *significantly* more likely to feel positive about it than those who do not.

Those aged 65 and over feel *significantly* more positive about using the bus than other age groups. More than 4 in 10 16-34 year olds felt negatively about the bus.

Q: Currently how positively or negatively do you feel about travelling using the following modes (Bus, Train)? Base in brackets

Perceptions of the train



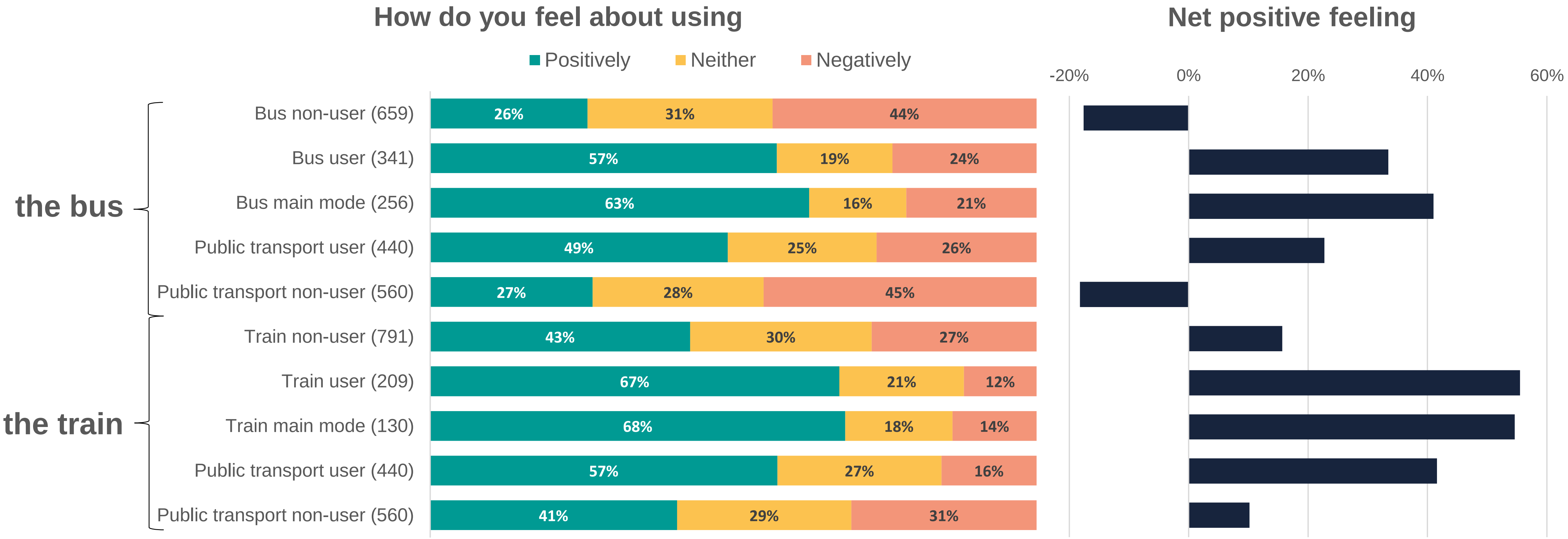
Just under half of people reported feeling positively about the train. Those who use the train are *significantly* more likely to feel positive about it than those who do not.

Positive feelings about train use are consistent across demographics except for those aged 65 and over who feel less positively but not *significantly* so.

Q: Currently how positively or negatively do you feel about travelling using the following modes (Bus, Train)? Base in brackets

Perceptions of bus and train – bus and train comparison

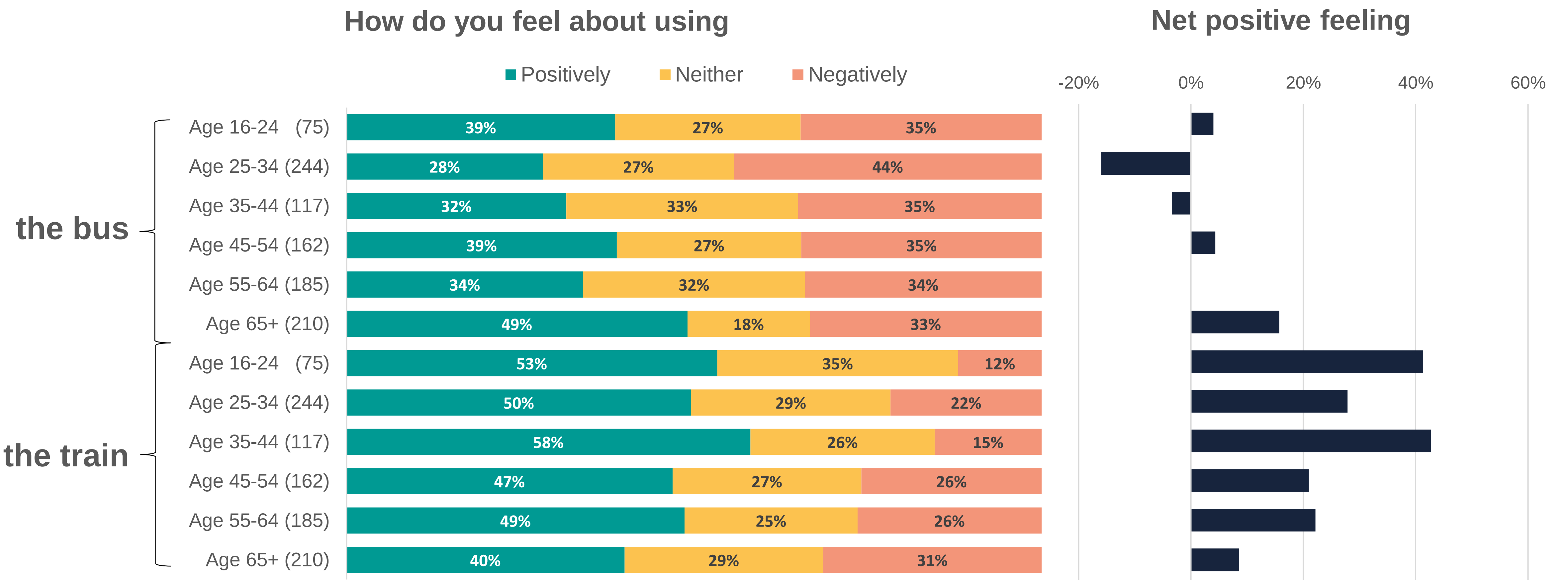
There are considerable differences in views of each mode by non-users; on balance, people who don't use the bus had more negative views than positive, whilst the opposite is true for people who don't use the train.



Q: Currently how positively or negatively do you feel about travelling using the following modes (Bus, Train)? Base in brackets

Perceptions of bus and train – bus and train comparison

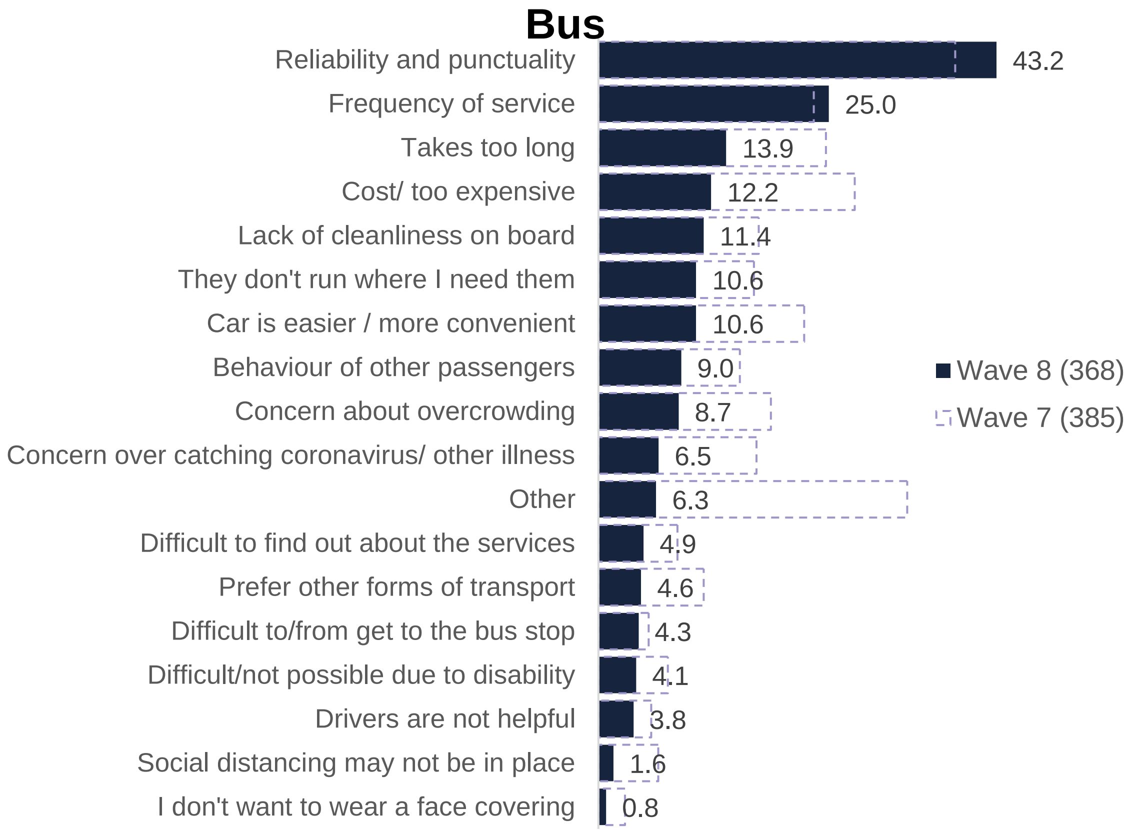
On balance, 25-44 year olds reported more negative than positive views of the bus, whilst people aged 65 and over viewed bus more positively. In contrast, for train, the share of positive views decreases with age.

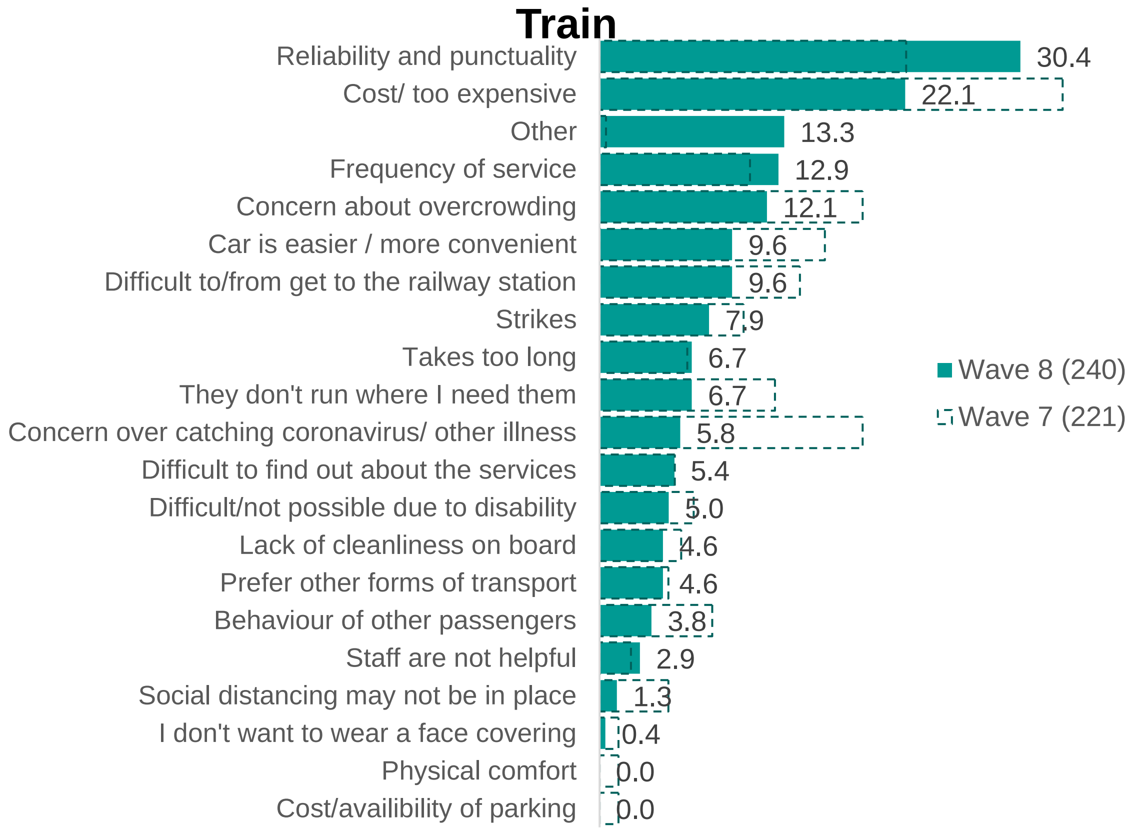


Q: Currently how positively or negatively do you feel about travelling using the following modes (Bus, Train)? Base in brackets

Reasons for negative views about bus & train

Respondents who reported negative views of the bus, and or the train were asked why, with the stand-out reason for both modes being reliability and punctuality. The two top reasons for negative views of the bus are reliability and punctuality for all age groups.



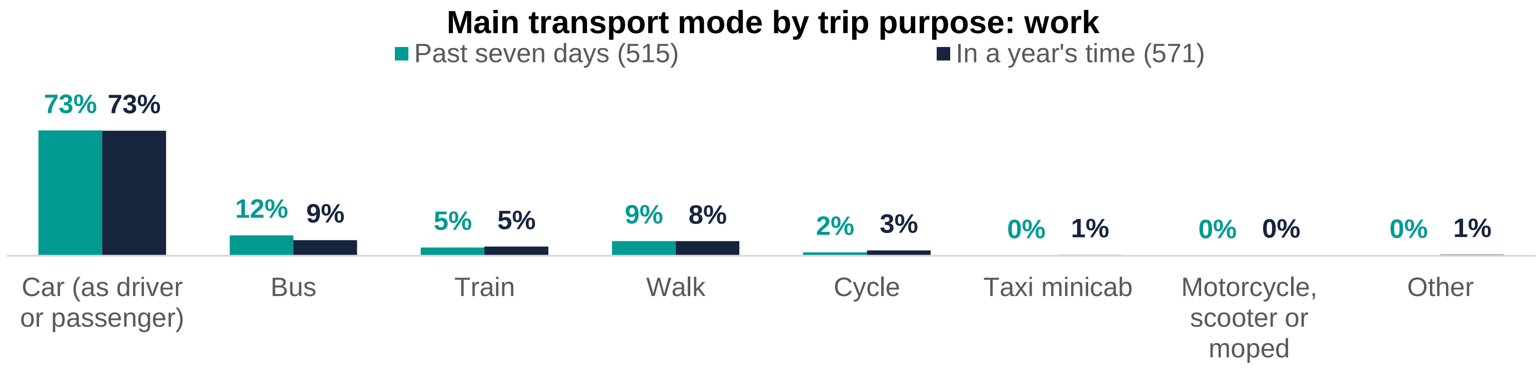


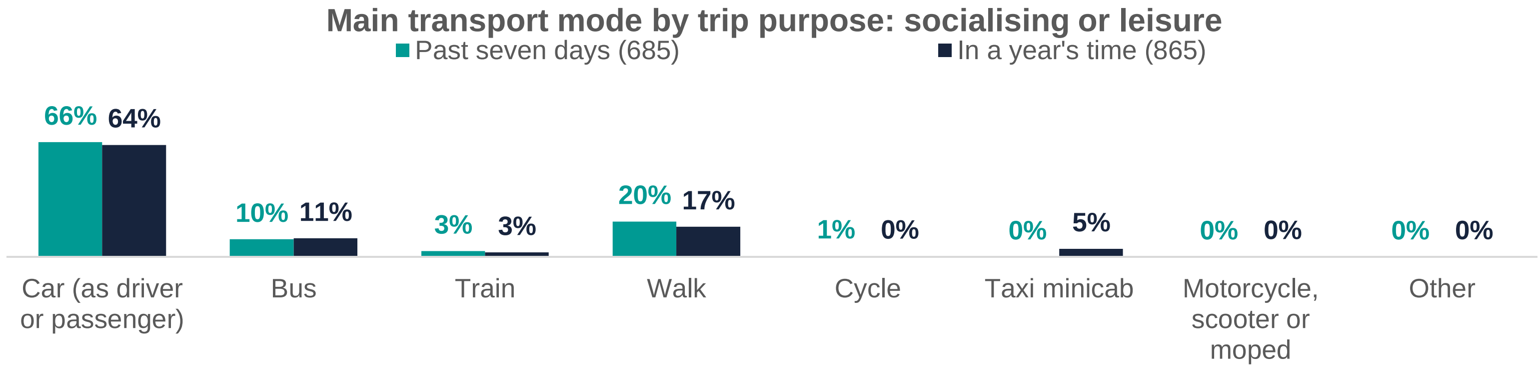
Q: Why do you feel negative towards travelling by Bus / Train? Base: Respondents who felt quite or very negatively about the mode (in brackets)

Changes in Travel Behaviour

Main mode: work / socialising or leisure

Comparison of main mode choice from the past seven days to intentions in a year's time suggests minimal changes in commuting habits, with a slight decline in bus use. For socialising or leisure trips, mode preference suggests similarly subtle changes with a slight shift from car use and walking towards taxi use.

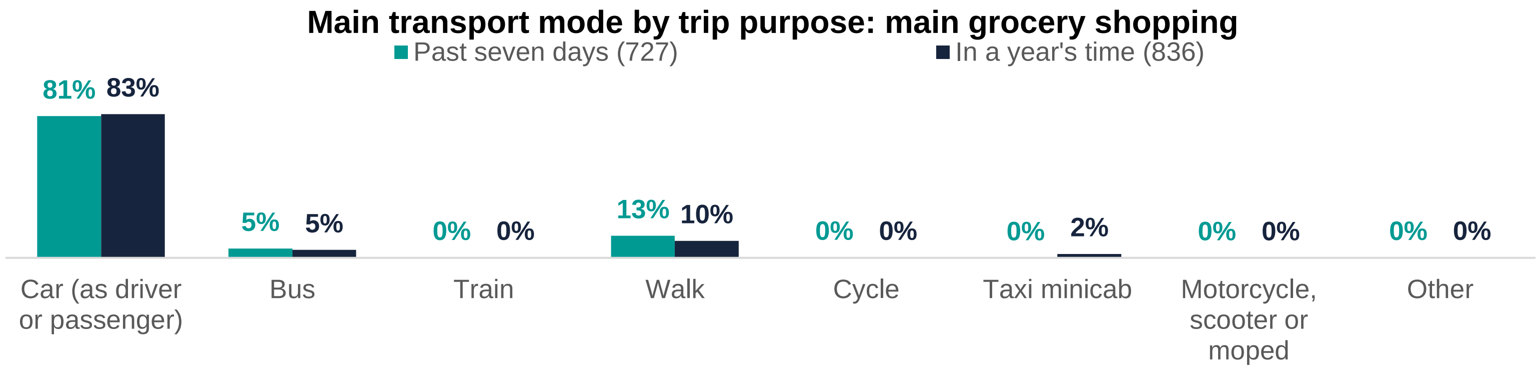


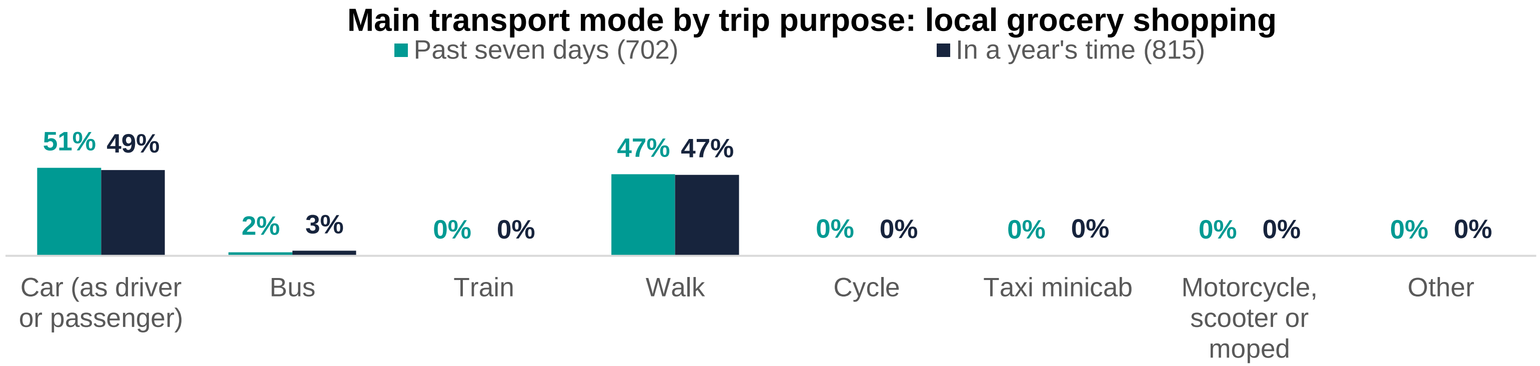


Q: In the past seven days, when undertaking trips for the following purposes, which way have you travelled most often: work/socialising or leisure (520 work/725 socialising or leisure) Q: In about a year's time, when undertaking trips for the following purposes, which way do you expect to travel most often: work/socialising or leisure (571 work/865 socialising or leisure)

Main mode: grocery shopping

Main mode share for grocery shopping suggests subtle changes around a drop in walking for main shops.

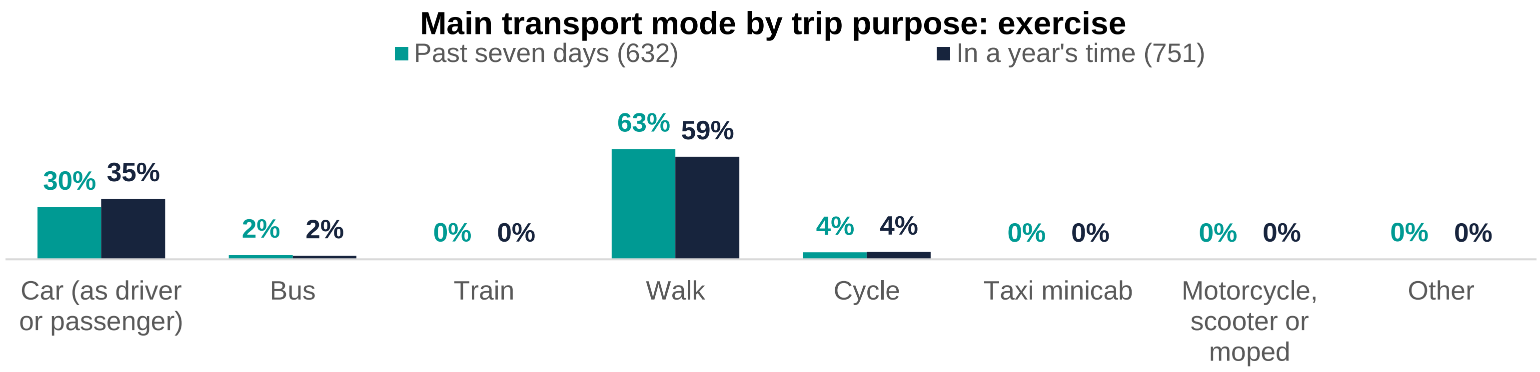


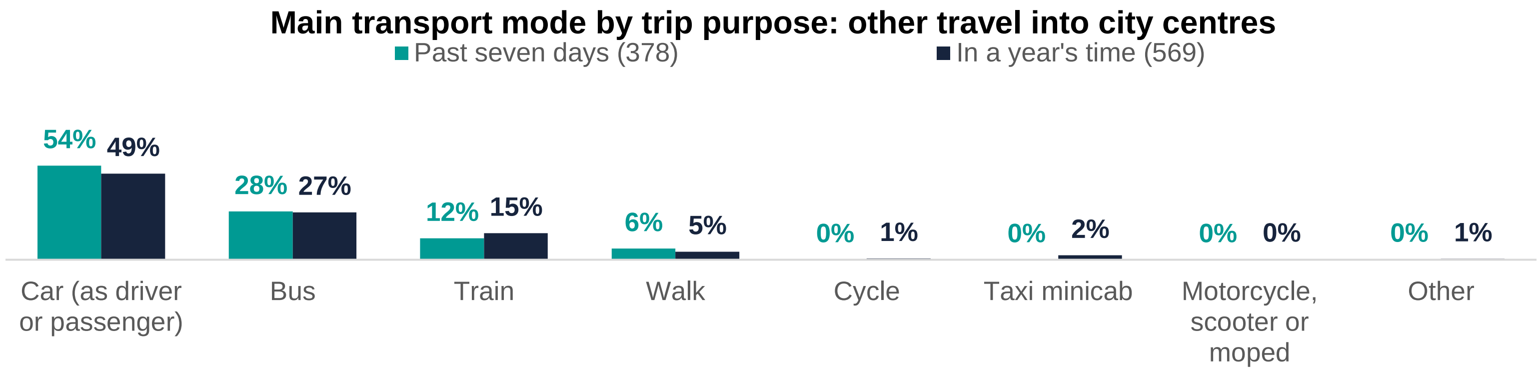


Q: In the past seven days, when undertaking trips for the following purposes, which way have you travelled most often: main/local grocery shopping (749 main/715 local)
Q: In about a year's time, when undertaking trips for the following purposes, which way do you expect to travel most often: main/local grocery shopping (836 main/815 local)

Main mode: exercise / other travel into city centres

Main modal choice for exercise shows a move from walking towards car use in about a year's time. For other travel into city centres, there is movement from car towards train use.



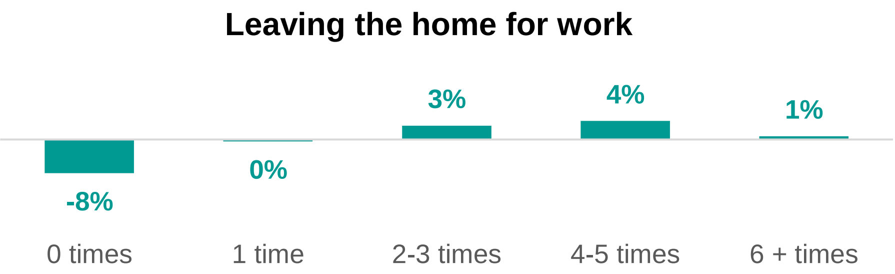


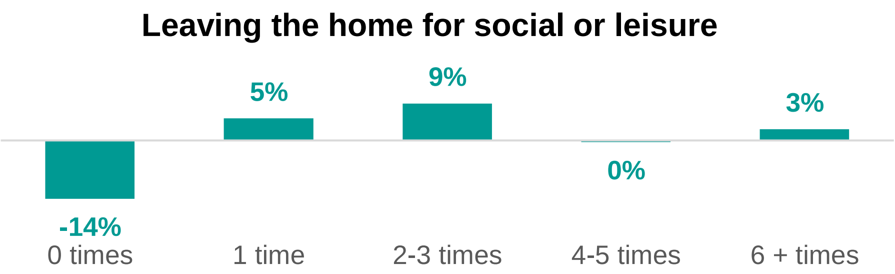
Q: In the past seven days, when undertaking trips for the following purposes, which way have you travelled most often: Exercise/Other travel into city centres (635 exercise/389 other travel into city centres) Q: In about a year's time, when undertaking trips for the following purposes, which way do you expect to travel most often: Exercise/Other travel into city centres (751 exercise/569 other travel into city centres)

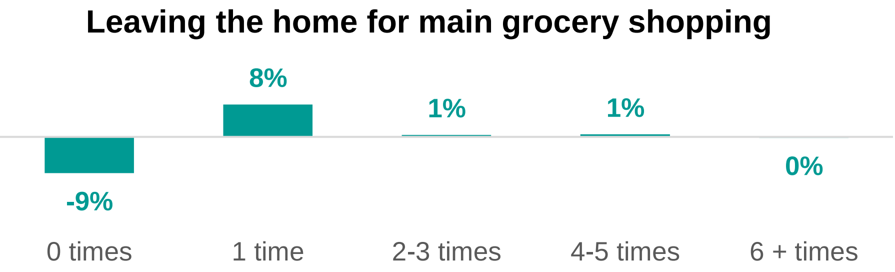
Leaving home for particular journey purposes

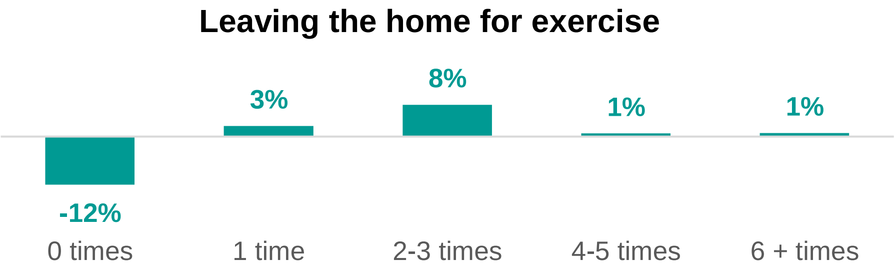
The net change of how many times people leave their home for particular purposes shows respondents expect to travel more in a year's time.

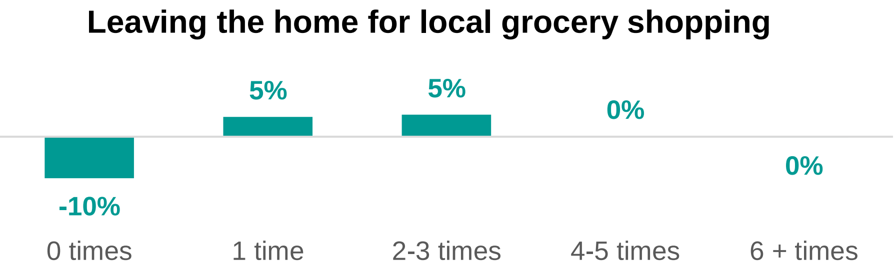
A shift away from 0 times per week can be seen across all purposes, notably for city centre trips.

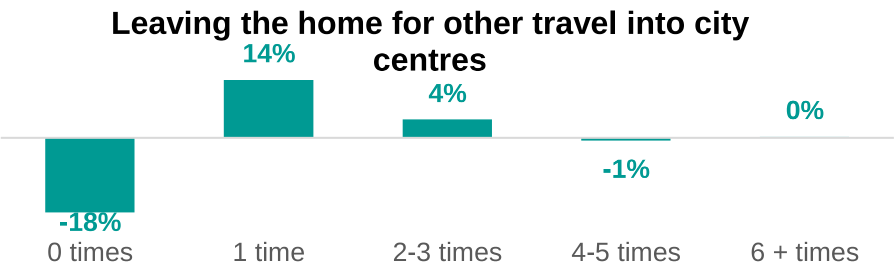












Q: In the past seven days, how many times have you left your home to go: work/main grocery shopping/local grocery shopping/social or leisure/exercise/other travel into city centres (629 work/1,000 all others) Q: In about a year's time, how often do you expect to leave your home to go: work/main grocery shopping/local grocery shopping/social or leisure/exercise/other travel into city centres (629 work/1,000 all others)

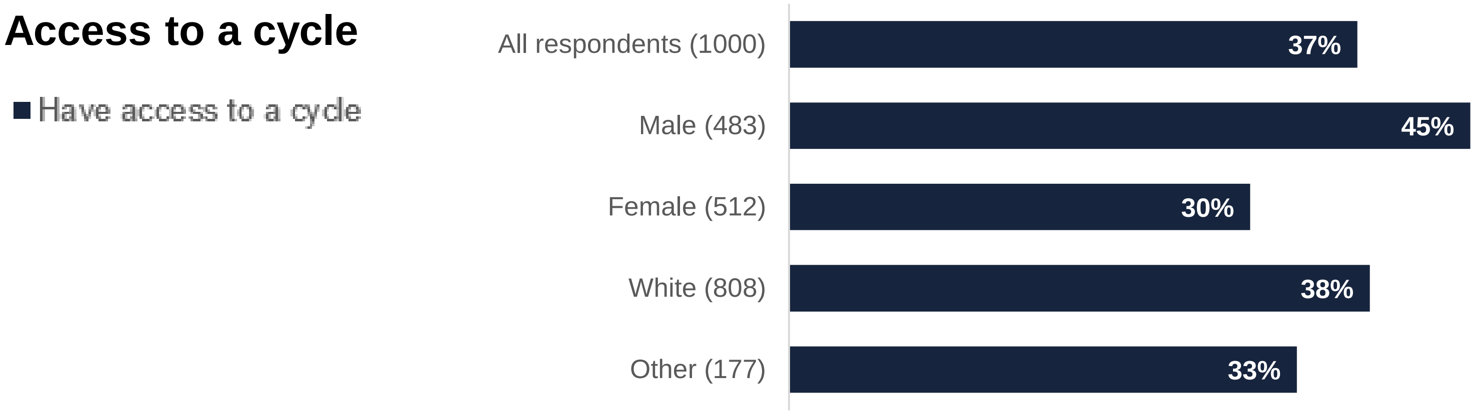
West Yorkshire Combined Authority

Tracy Brabin Mayor of West Yorkshire

Cycling

Cycling – Access to a bike & confidence

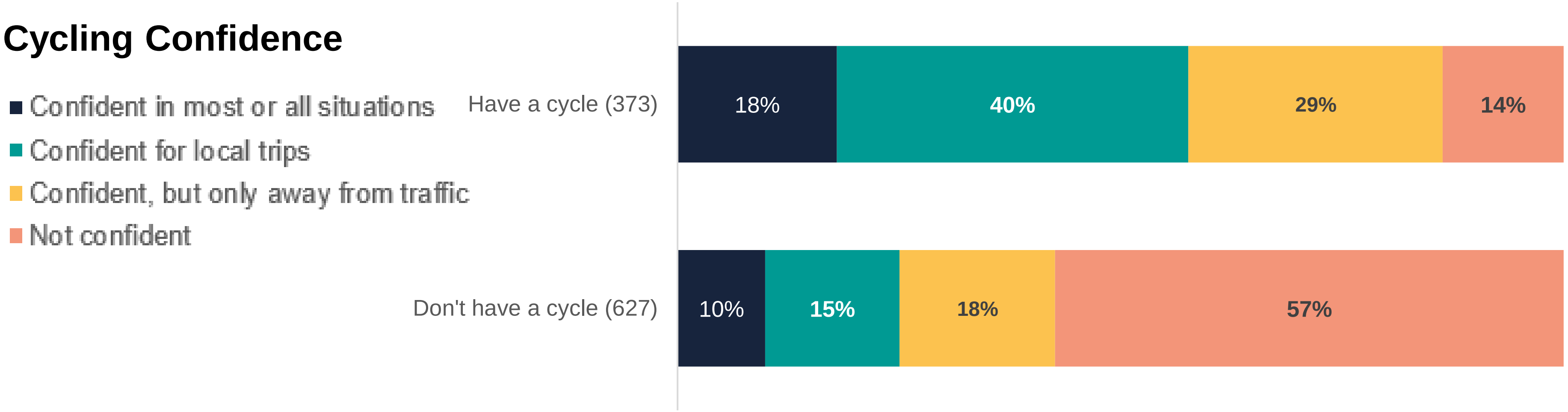
Access to a cycle



More than 1 in 3 people have access to a cycle; Men are *significantly* more likely to own a cycle, whilst those aged 65 and over are *significantly* less likely to own a cycle.

Those who own a cycle are *significantly* more likely to feel confident in most or all situations, or confident for local trips, compared to those who do not have a cycle.

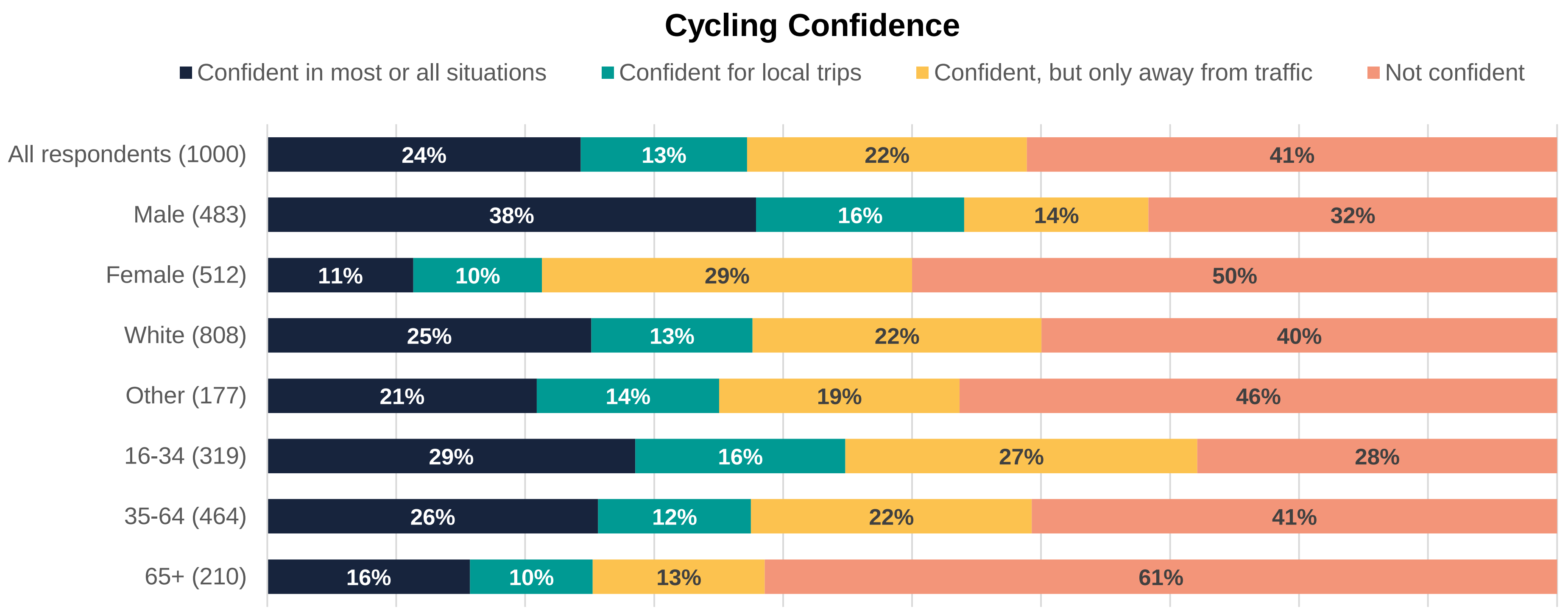
Cycling Confidence



Q: Do you own or have access to a bicycle? Q: Which best describes your cycling?

Cycling – Access to a bike & confidence

Looking at cycling confidence across different demographic groups, the results show men are *significantly* more likely to feel confident cycling than women, and those aged 65 and over are *significantly* more likely to be not feel confident cycling compared to younger groups.



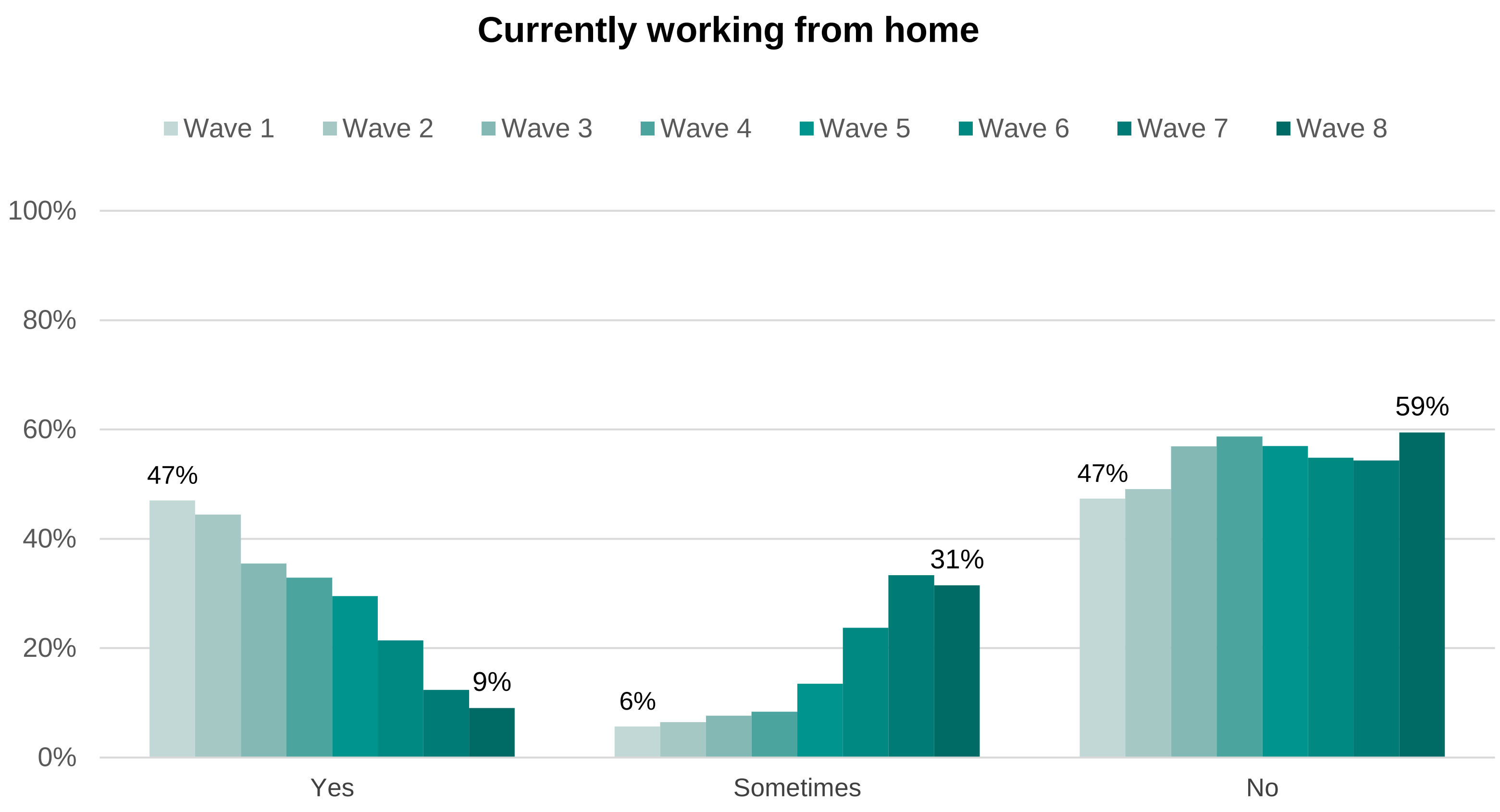
Q: Do you own or have access to a bicycle? Q: Which best describes your cycling?

Home Working & Commuting

Home Working Status

Fewer than 1 in 10 workers are now working at home exclusively, a significant fall from wave 1 of this survey, conducted in June 2020 (47%).

59% of workers now report not working at home at all, whilst 31% say they work at home sometimes, adopting a hybrid working pattern.

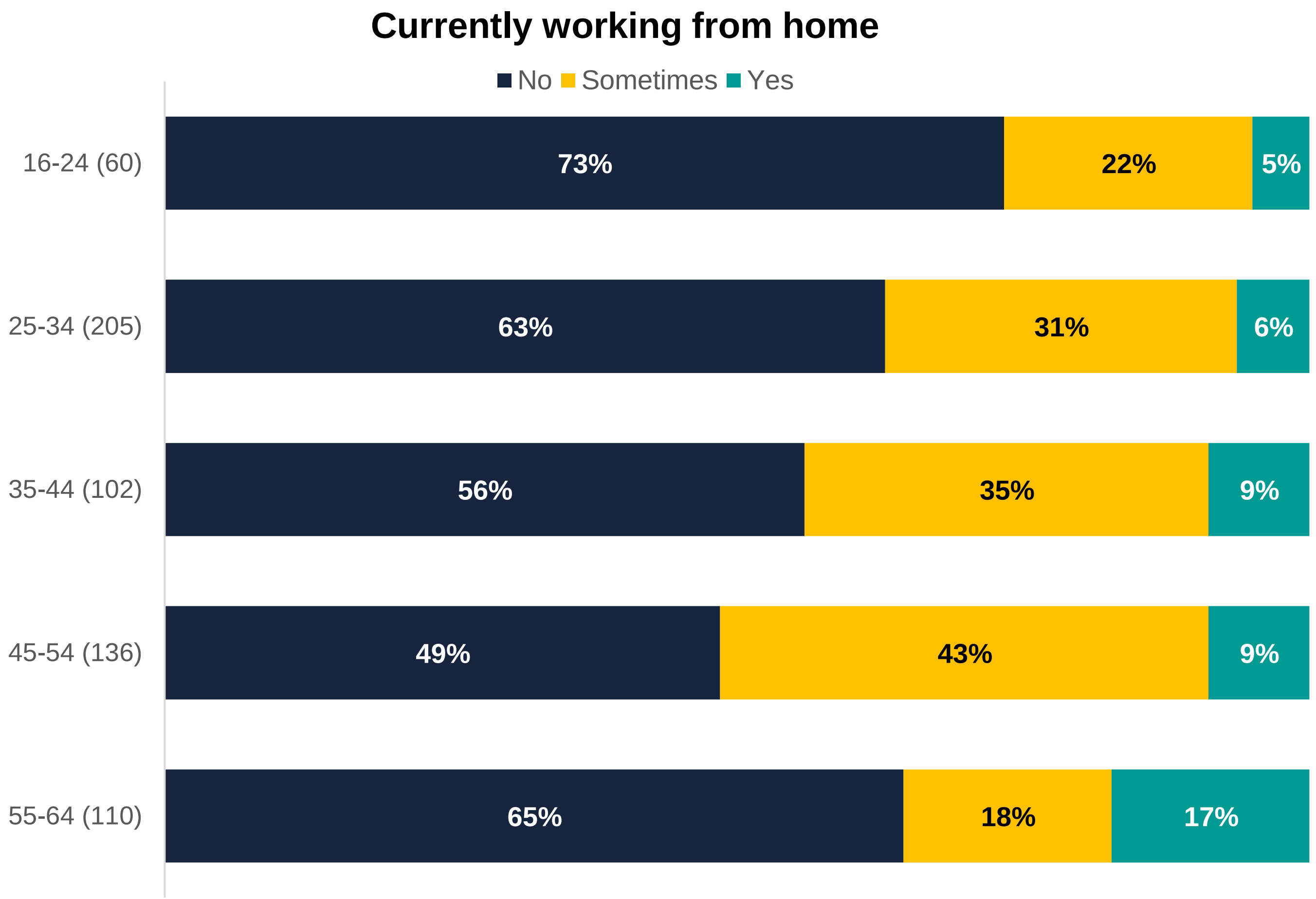


Q: Approximately how many days each week do you work? Wave 8 base = 629
Q. In an average month, where do you spend your time working? Wave 8 base: 629.

Home Working Status - by age

Younger workers are significantly less likely to not work at home at all compared to older workers; 73% of 16–24 year-old workers reported not working at home at all, whilst this figure drops to 52% for 35–54 year-old workers.

Workers aged 45-54 were twice as likely to report a hybrid working situation (working at home sometimes) compared to workers aged 16-24.



Q: Approximately how many days each week do you work? Wave 8 base = 629
Q. In an average month, where do you spend your time working? Wave 8 base: 629.

Home Working Status – hybrid workers commuting frequency

Respondents were asked how many days a week they work and where they spent their time working (in an average month), and from this commuting frequency can be derived.

The chart (right) shows the breakdown of commuting frequency for the 31% of respondents who said they adopt a hybrid working model (work at home sometimes).

Commuting 20% of their week (the equivalent of 1 day a week for a full-time worker) is the least commonly reported option of hybrid workers (3.3%). More than half of hybrid workers, equivalent to around 1 in 6 of all workers report commuting between 20-60% of their working week (equivalent to 1 and 3 days a week for a full-time worker).

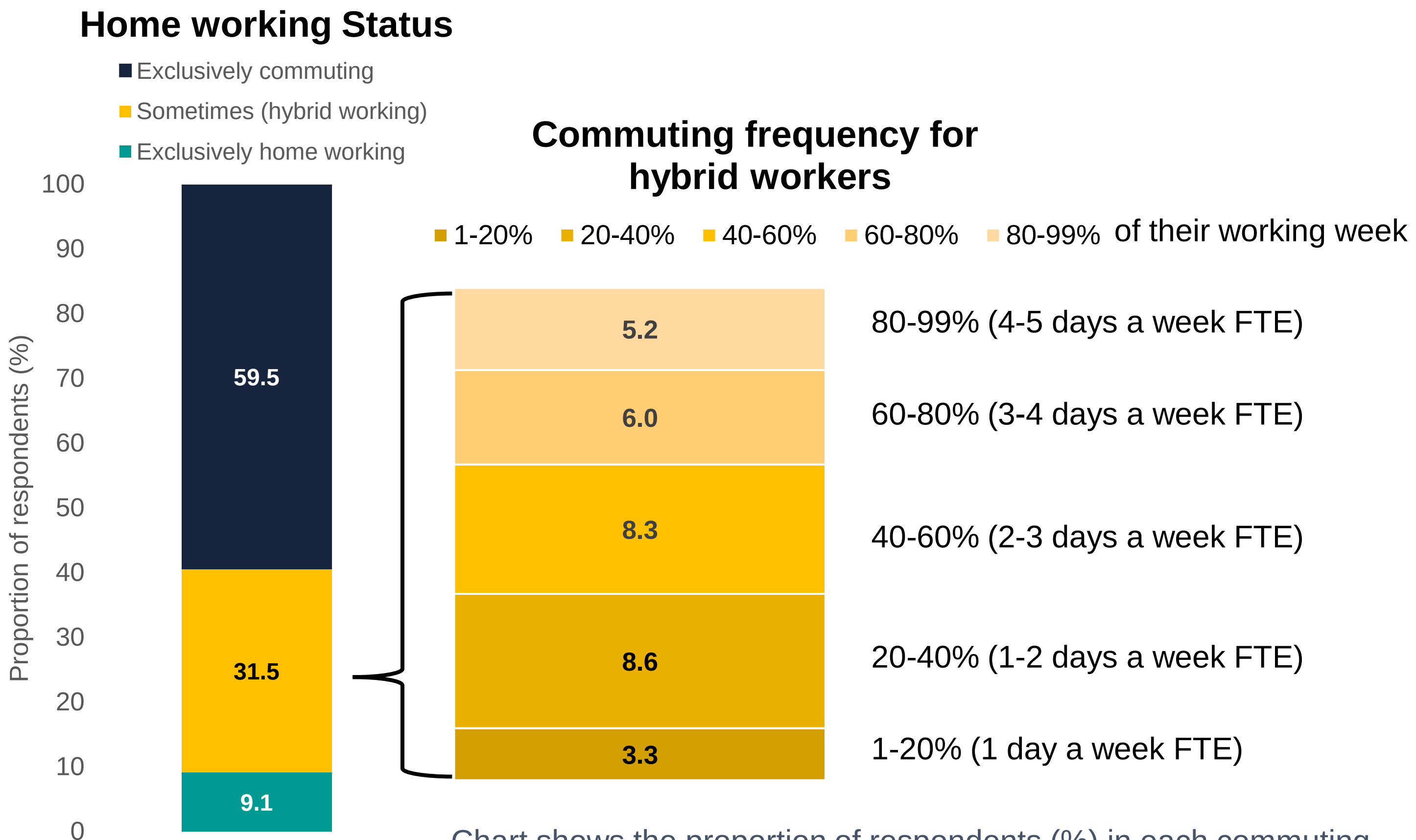


Chart shows the proportion of respondents (%) in each commuting frequency bracket, expressed as a percentage of their working week and as a Full Time Equivalent (FTE) worker (e.g. 20% hybrid commuter would be the equivalent of a worker commuting 1 day a week).

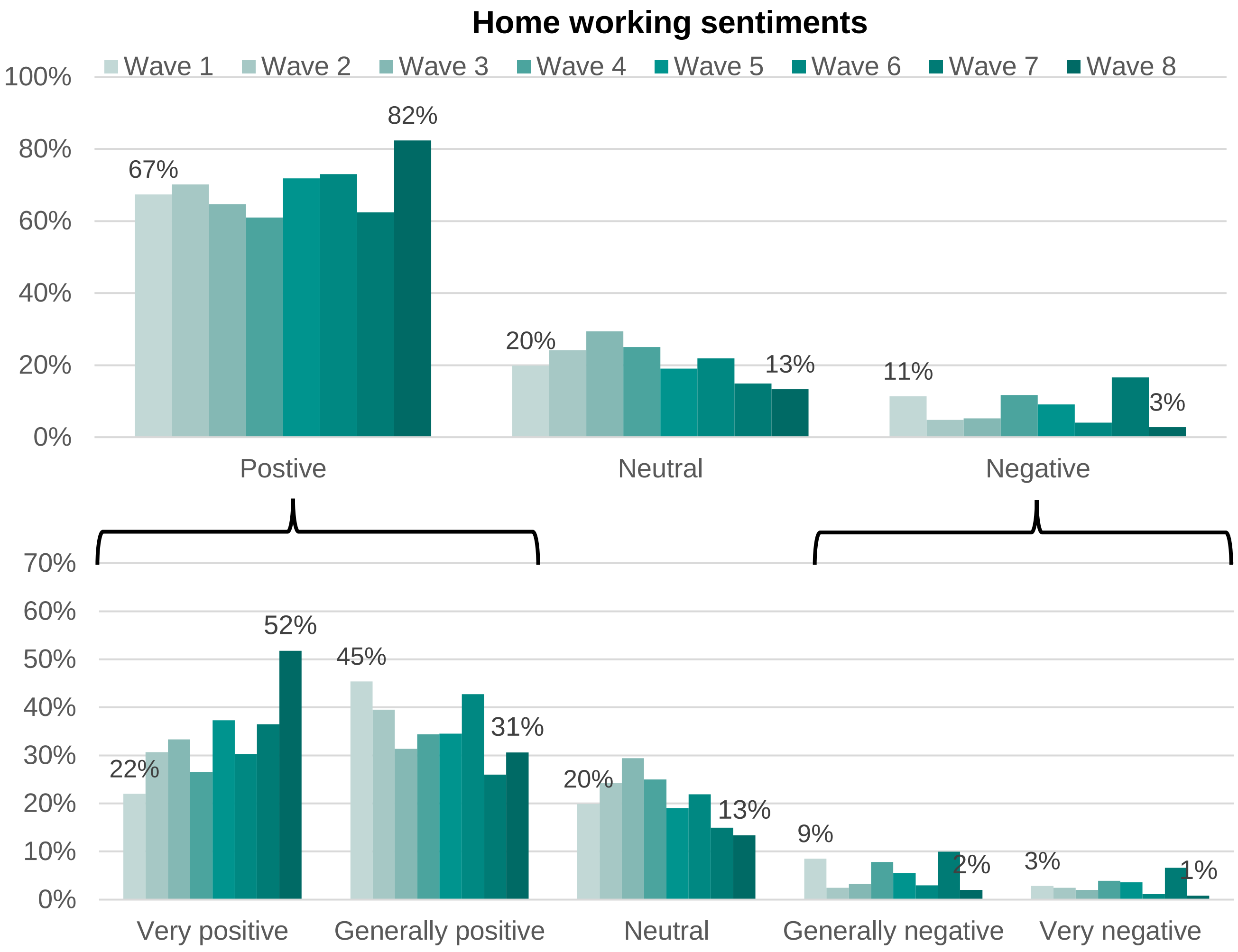
Q: Approximately how many days each week do you work? Wave 8 base = 629
Q. In an average month, where do you spend your time working? Wave 8 base: 629.

Home Working Sentiments

Respondents who are working at home exclusively or some of the time are asked about how they feel about home working.

In previous survey waves the majority of respondents have consistently reported a positive home working experience.

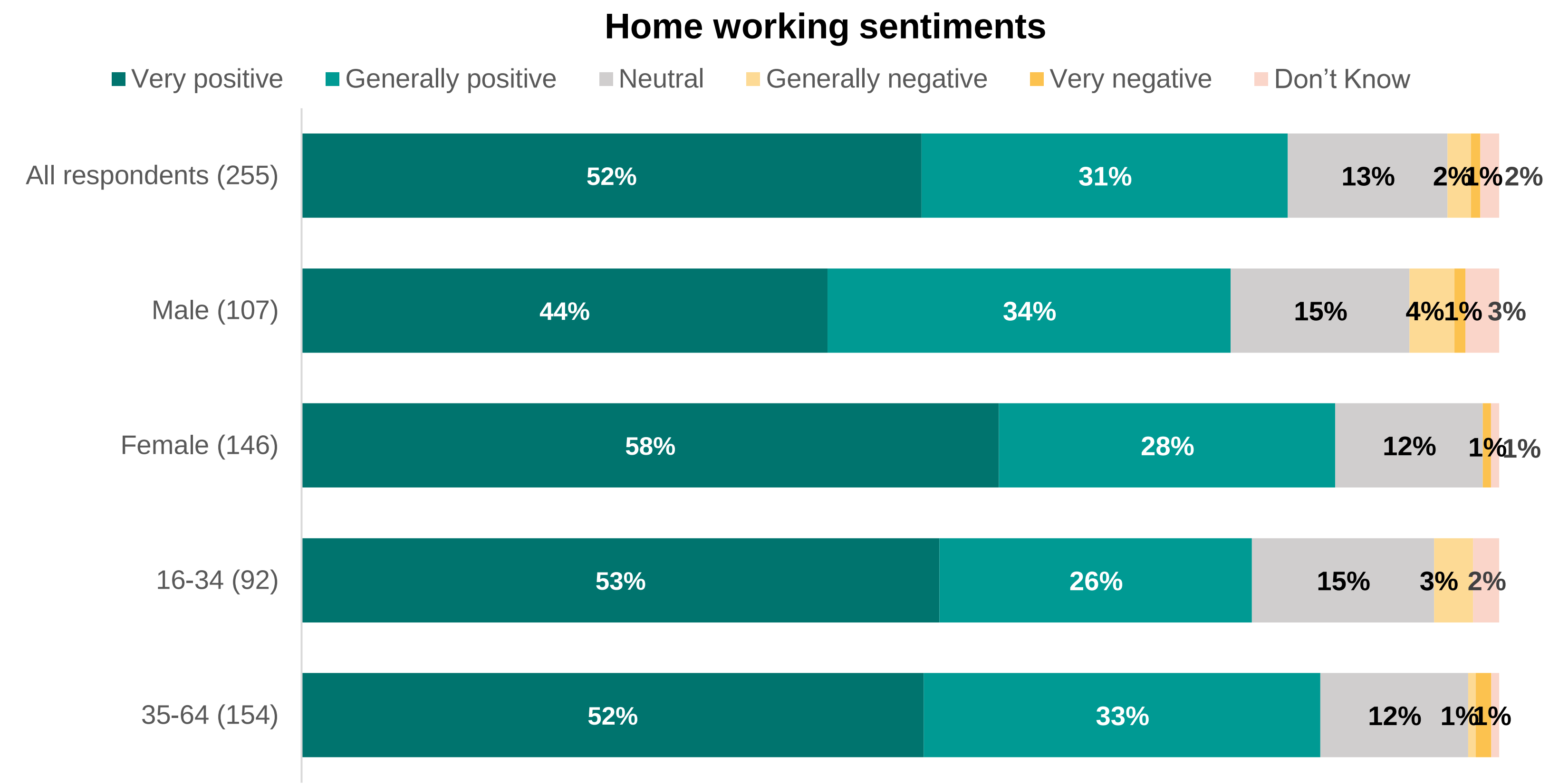
In this latest wave this rose to 82%. Over half of respondents now report a very positive home working experience, a rise from 22% in June 2022.



Q: How do you feel about working from home at the moment? Wave 8 base: 255

Home Working Sentiments – age and gender

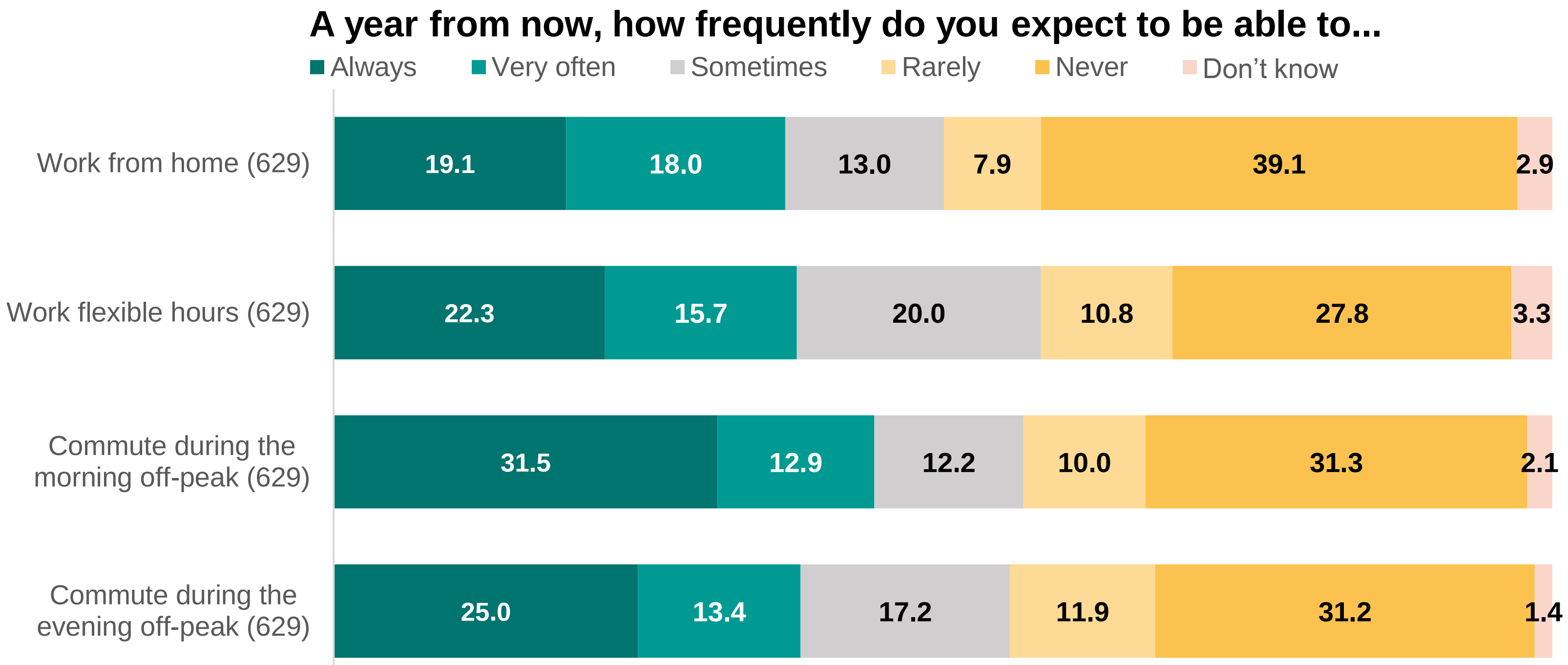
A higher proportion of women than men reported being very positive about home working (58% vs 44%) and more women than men reported being positive overall about home working (86% vs 78%).



Q: How do you feel about working from home at the moment? Wave 8 base: 255.

Flexibility

When respondents asked about working flexibility in a year's time, views were polarised; around 39% of workers expect to either always, or very often have flexibility over home working, hours or commuting times, whilst around a third said they would never have this flexibility.

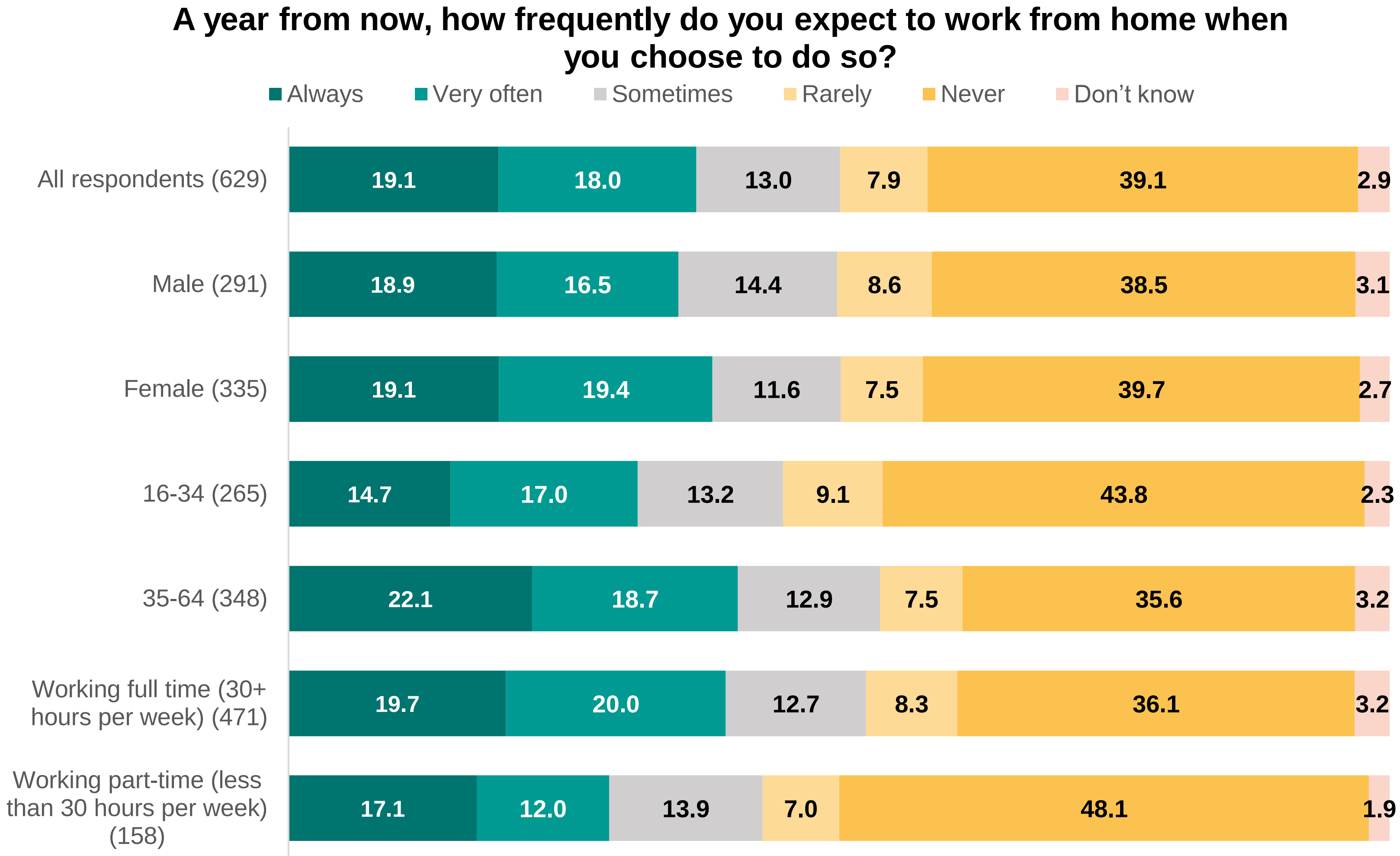


Q: A year from now, how frequently do you expect to be able to:
a. work from home when you choose to do so?
b. work flexible hours when you choose to do so?
c. commute to or from your place of work during 'off-peak hours' in the morning (i.e. outside 7am to 10am)?
d. commute to or from your place of work during 'off-peak hours' in the afternoon/evening (i.e. outside 4pmto 7pm)?

Flexibility – the choice of home working

37% of workers expect, in a year's time, to always or very often, be able to work from home whenever they choose to. In contrast, 39% of workers said they never expect to work at home when then choose.

Although there were no differences in responses by gender overall, its notable that a greater proportion (48%) of part-time workers said they never expect to work at home when then choose to, compared to full time workers (36%), and 71% of part-time workers on the survey sample were women.

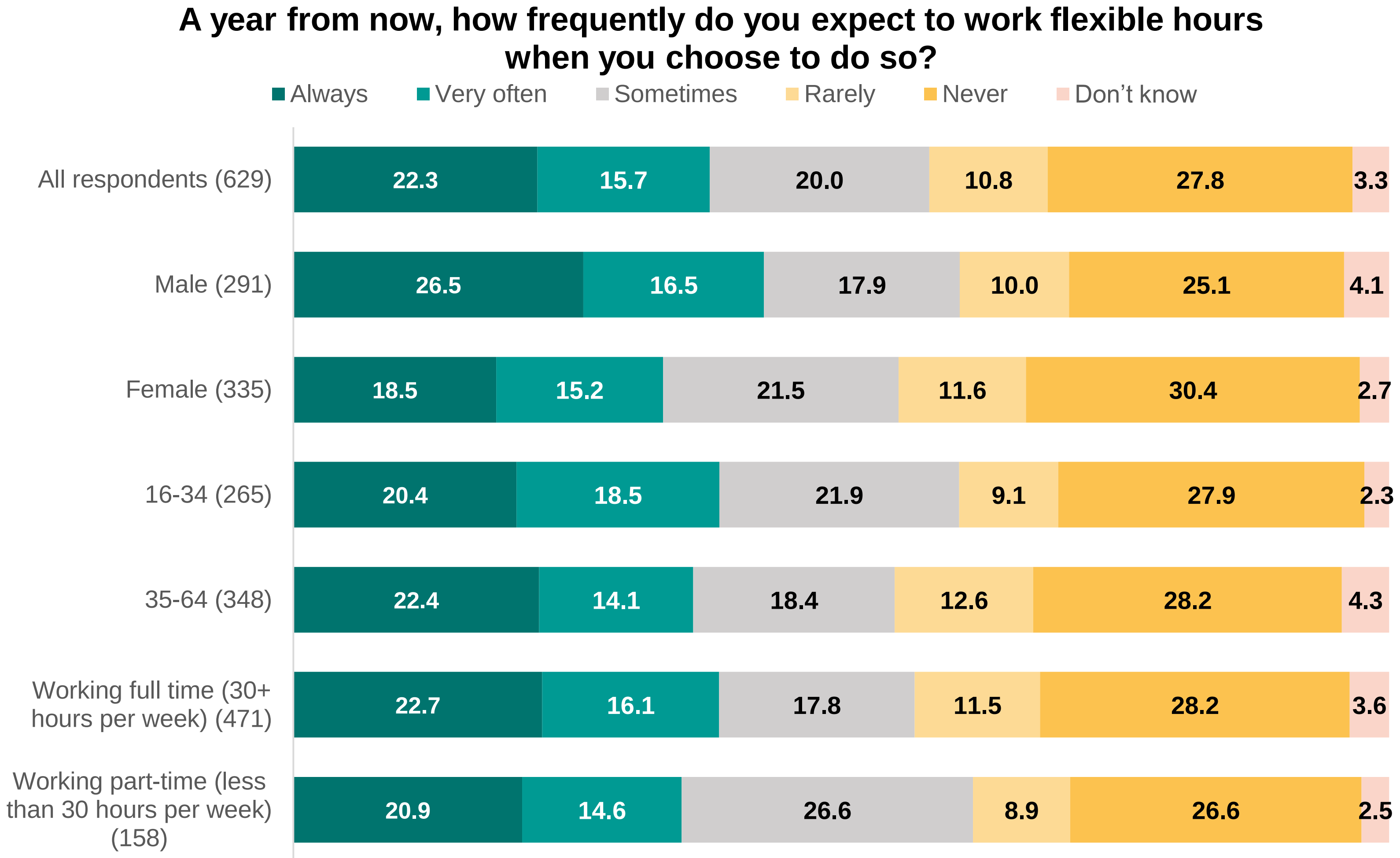


Q: A year from now, how frequently do you expect to be able to work from home when you choose to do so? Wave 8 base shown in brackets.

Flexibility – the choice flexible hours

38% of workers expect, in a year's time, to always or very often, be able to work flexible hours whenever they choose to. In contrast 28% of workers said they never expect to work flexible hours.

More than 1 in 4 men say they aways expect to work flexible hours, whilst fewer than 1 in 5 women reported the same flexibility.

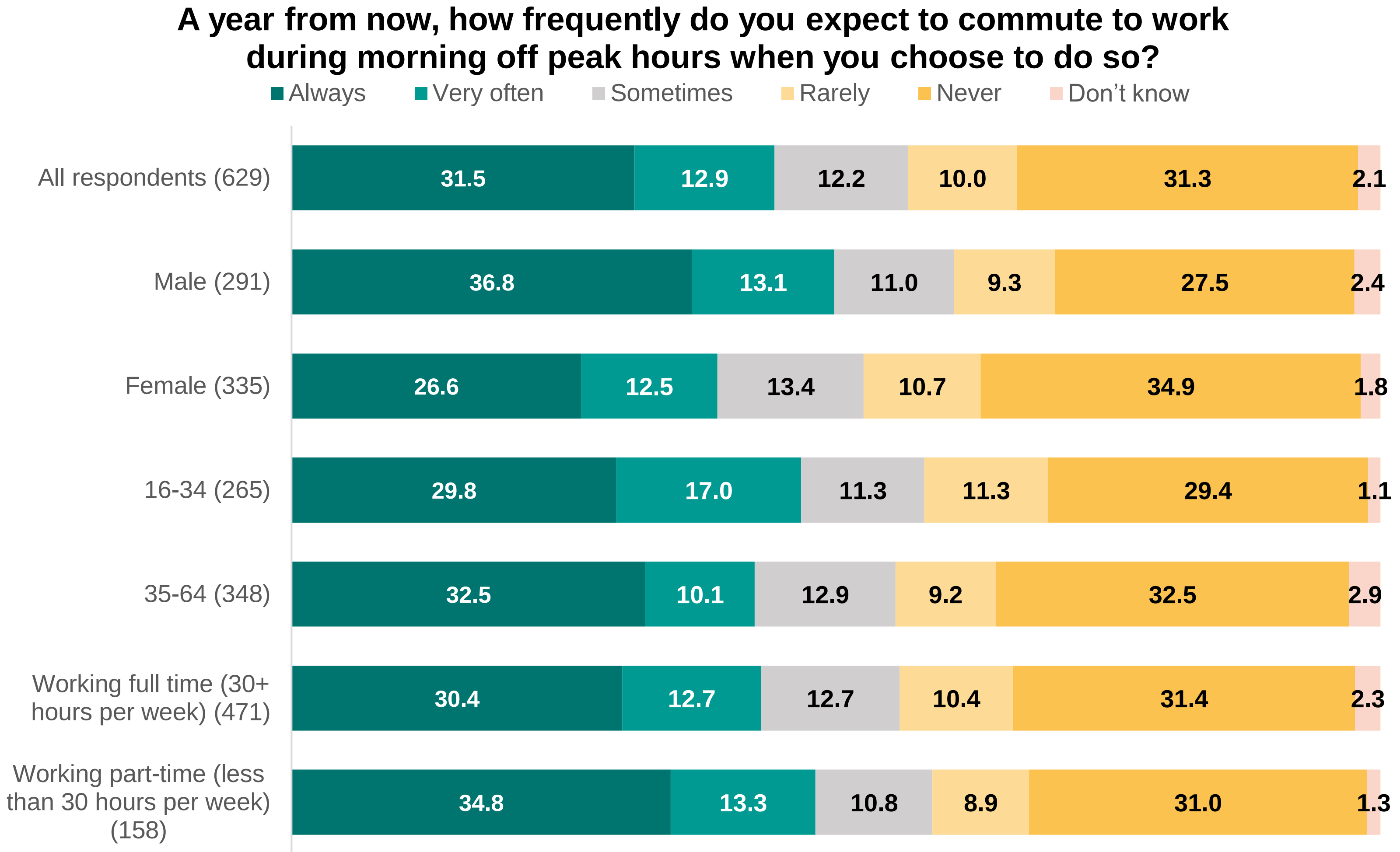


Q: A year from now, how frequently do you expect to be able to work flexible hours when you choose to do so? Wave 8 base shown in brackets.

Flexibility – morning commute during off-peak hours

44% of workers expect, in a year's time, to always or very often, be able to commute during off-peak hours in the morning (outside of 7am-10am) whenever they choose to. In contrast 31% of workers said they never expect to be able to do this.

A greater proportion of men than women expect to have always or very often be able to commute during off-peak hours in the morning.



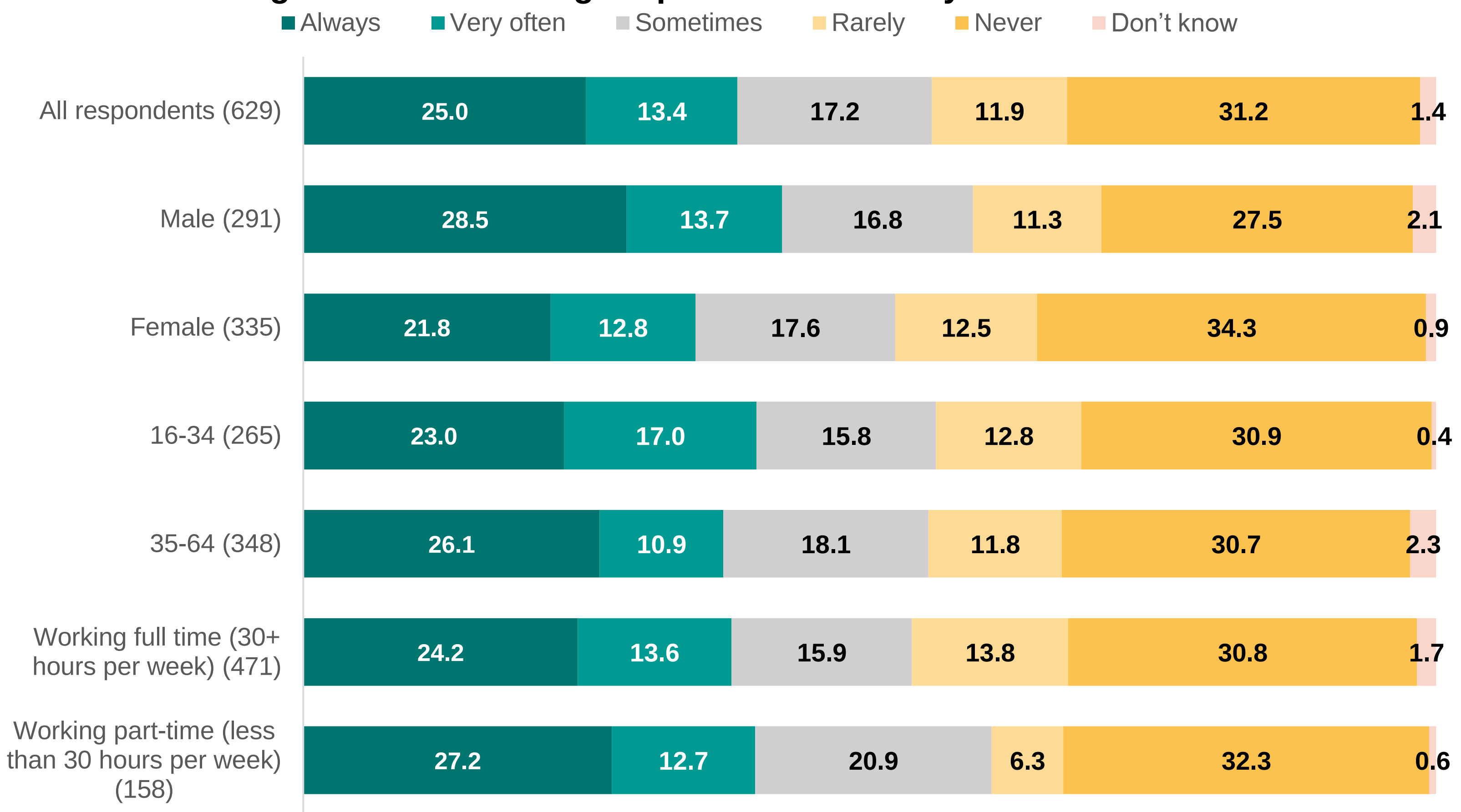
Q: A year from now, how frequently do you expect to be able to commute to or from your place of work during 'off-peak hours' in the morning (i.e. outside 7am to 10am)? Wave 8 base shown in brackets.

Flexibility – evening commute during off-peak hours

38% of workers expect, in a year's time, to always or very often, be able to commute during off-peak hours in the evening (outside of 4pm-7pm) whenever they choose to.

Whilst the share of workers who say they never expect flexibility over commuting times is the same in the morning and evening, expectations of flexibility is greater in the morning than the evening.

A year from now, how frequently do you expect to commute to work during afternoon/evening off peak hours when you choose to do so?



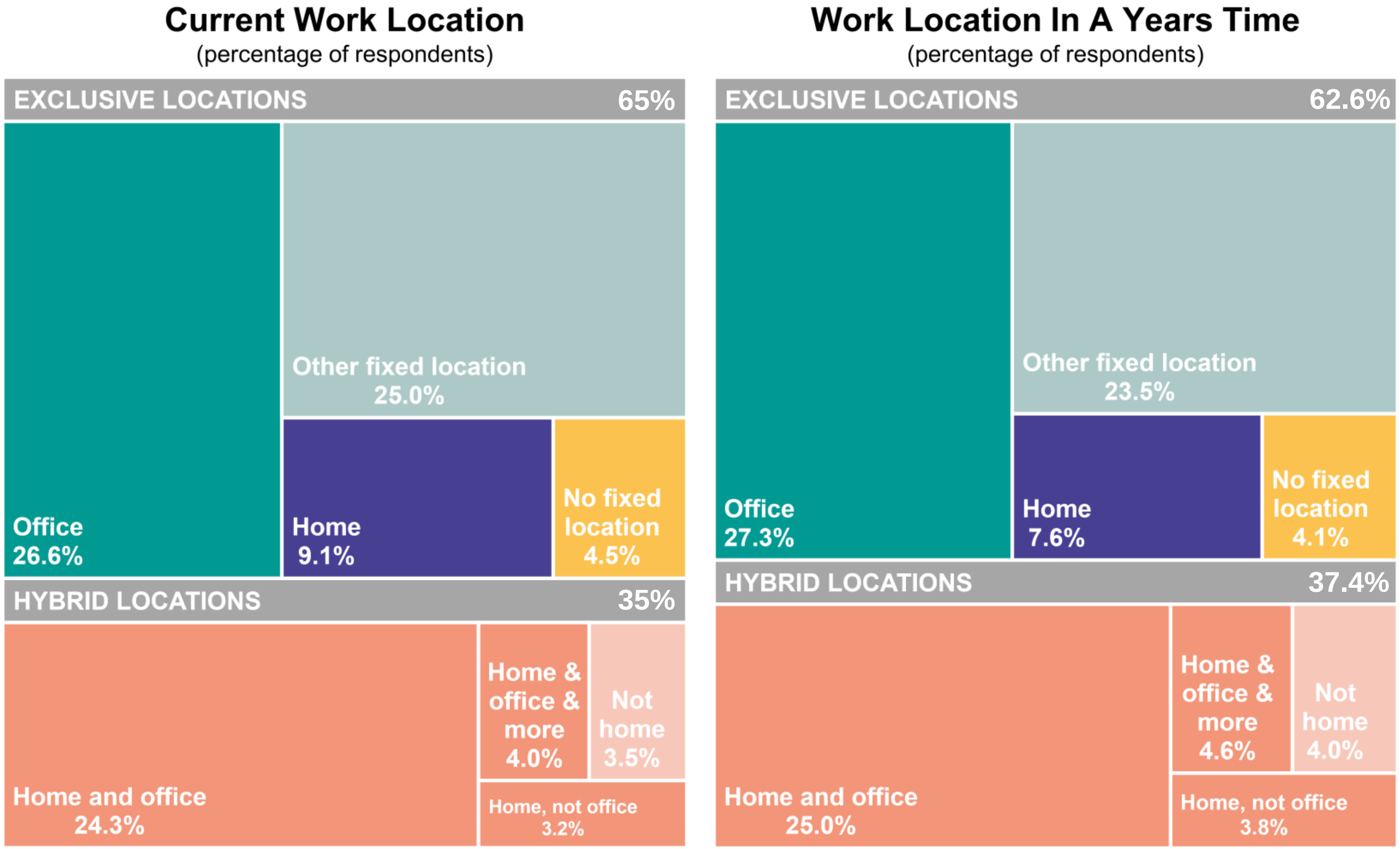
Q: A year from now, how frequently do you expect to be able to commute to or from your place of work during 'off-peak hours' in the afternoon/evening (i.e. outside 4pm to 7pm)? Wave 8 base shown in brackets.

Working Locations – now and anticipated in a year's time

The treemaps (right) illustrate the proportionate share of working locations based the number of days respondents said currently and expect to work (in a year's time) at various types of location.

Just over half of workers reported exclusively working in either an office or other fixed location (e.g., school or hospital).

Under one third of workers opt for hybrid working locations which includes their home, although the majority of these are people who split their time between the office and their home.

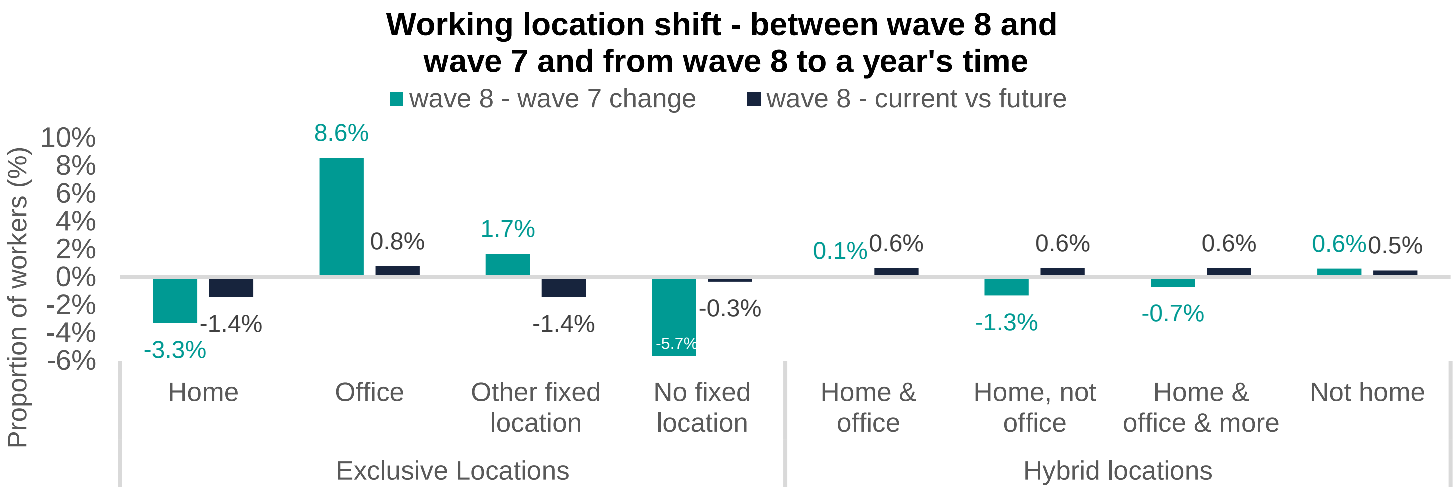


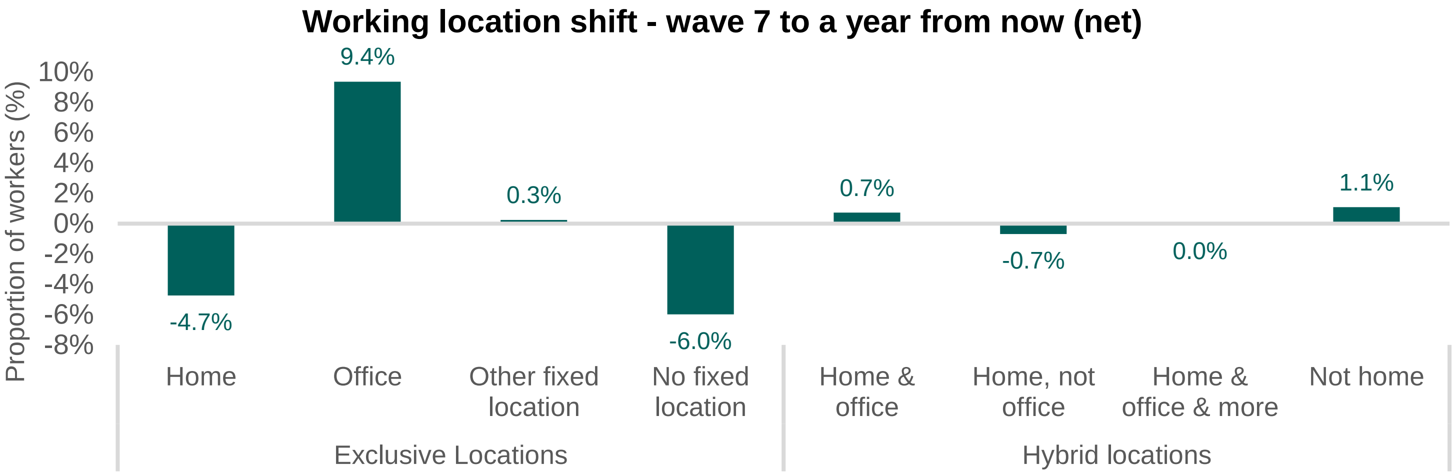
Q. In an average month, where do you spend your time working?
Q. A year from now, assume there are no Covid-related restrictions that affect you and that you stay in the same/ similar role, where do you think you will spend your time working? (Base = 629, each respondent treated equally regardless of the number of days worked)

Working Locations – now and anticipated in a year's time

Between survey wave 7 (April/May 2022) and wave 8 (October 2022), 3.3% fewer workers reported exclusively working from home, whilst 8.6% more workers reported exclusively working in the office.

Respondents were asked to anticipate working locations a year from now (with status quo maintained), and overall, they reported a limited degree of further change; a further slight reduction in exclusive home working (-1.4%) and small increase in hybrid working (2.4%).



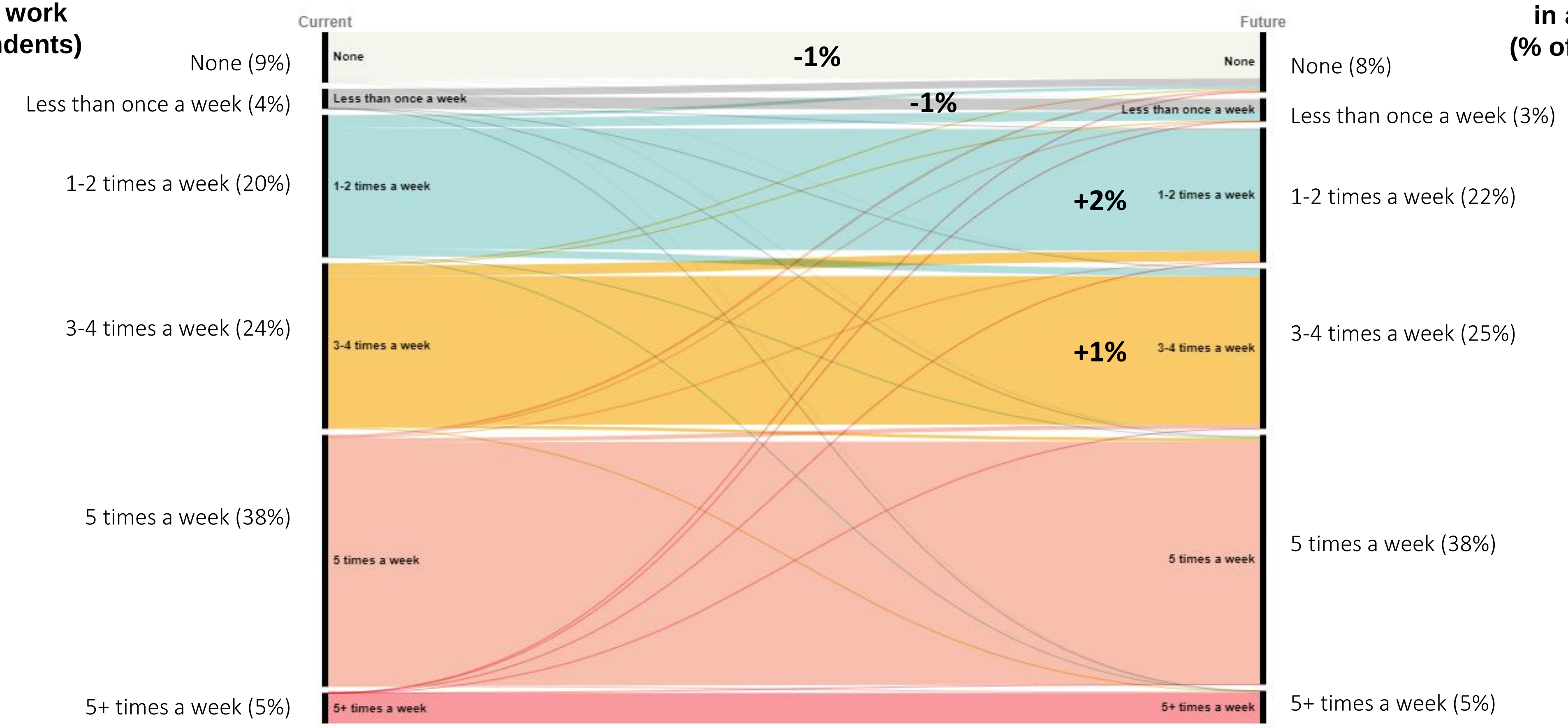


Q. In an average month, where do you spend your time working?
Q. A year from now, assume there are no Covid-related restrictions that affect you and that you stay in the same/ similar role, where do you think you will spend your time working? (Base = 629, each respondent treated equally regardless of the number of days worked)

Frequency of commuting - Now & in a year's time

Current days travelled to work (% of respondents)

Days travelled to work in a year's time (% of respondents)



Q: How many days a week do you travel to work?
Q. A year from now, assume there are no Covid-related restrictions that affect you and that you stay in the same/ similar role, where do you think you will spend your time working? (Base = 629, each respondent treated equally regardless of the number of days worked)

West Yorkshire Combined Authority

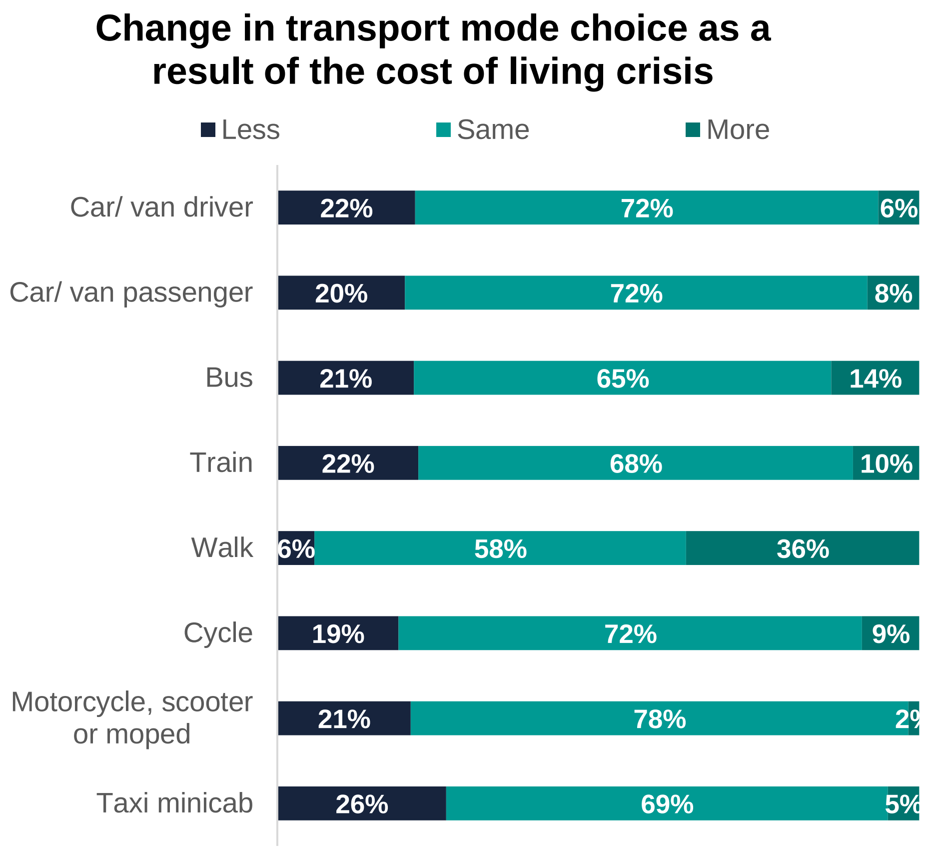
Tracy Brabin Mayor of West Yorkshire

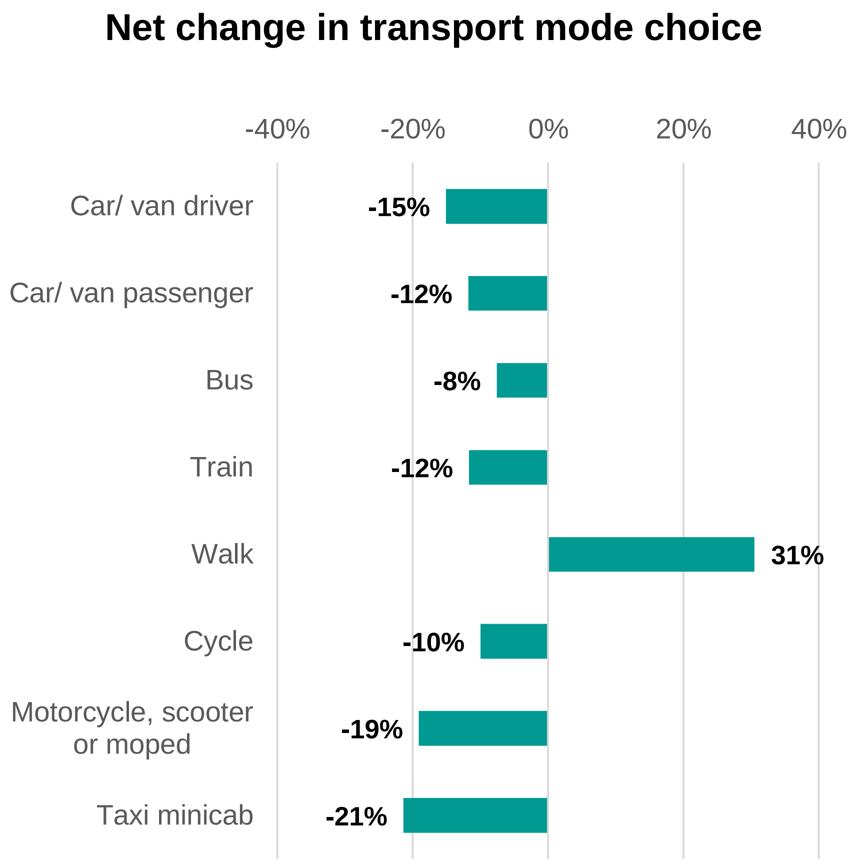
Cost of Living Crisis

Cost of living crisis - mode choice

In response to the cost-of-living crisis 36% of respondents intend to walk more. Around 20% of respondents intend to use motorised modes less, while 14% intend to use the bus more and 10% train. Almost 20% will cycle less. Taxi usage is the most reduced.

This results in a net increase in walking with a decline in all other modes.





Q: In response to the current cost-of-living crisis, do you expect to use any of the following modes of transport more/same/less (base 1,000)

Cost of living crisis - focus on walking

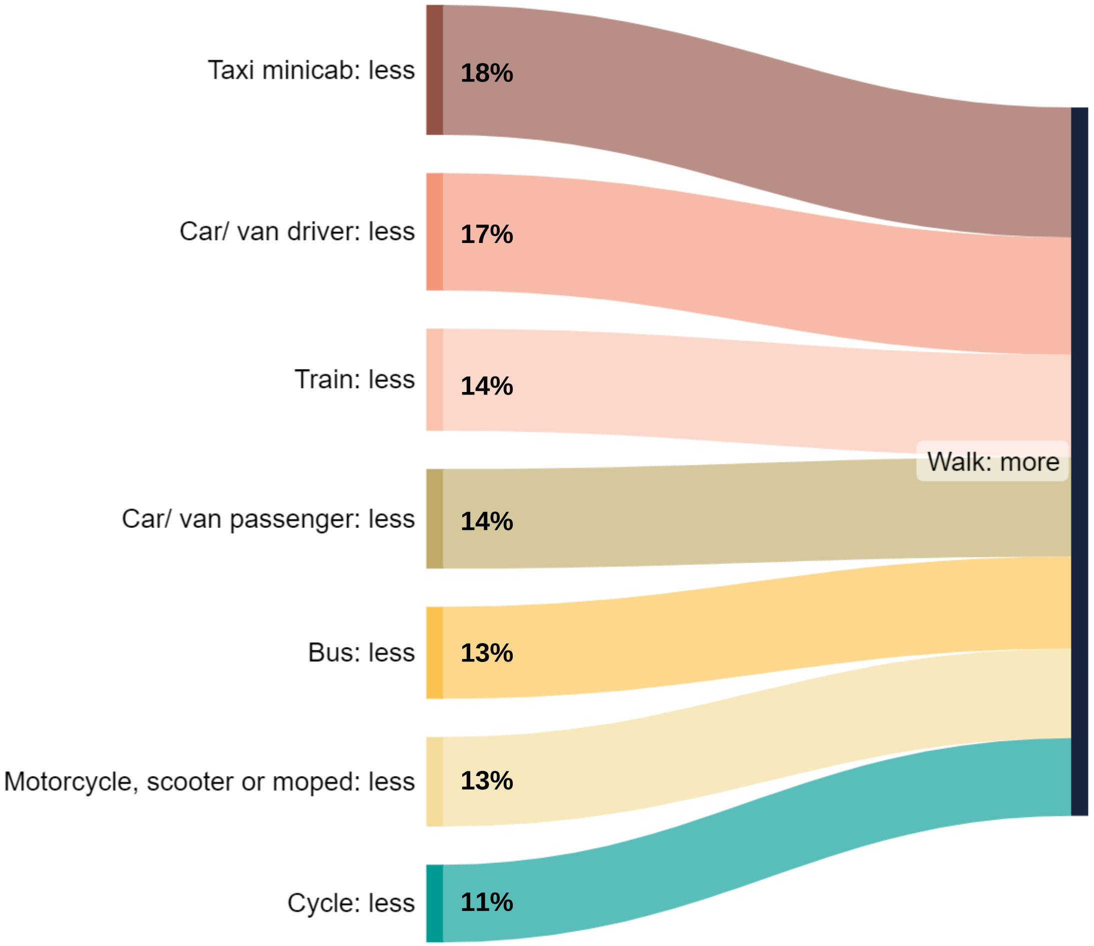
363 respondents said they intended to walk more in response to the cost of living crisis.

Of these, 839 “less” answers were given against other modes – this is because respondents could choose different answers against each mode.

For example, someone could be using the car and bus less, in favour of walking more.

Proportionally, of the 839 answers which indicated a mode would be used less in favour of walking more, most movement was away from taxi use.

Combining car/van driving and passenger use would show a 31% shift from private car to walking in response to the cost of living crisis.



Q: In response to the current cost-of-living crisis, do you expect to use any of the following modes of transport more/same/less (base 1,000)

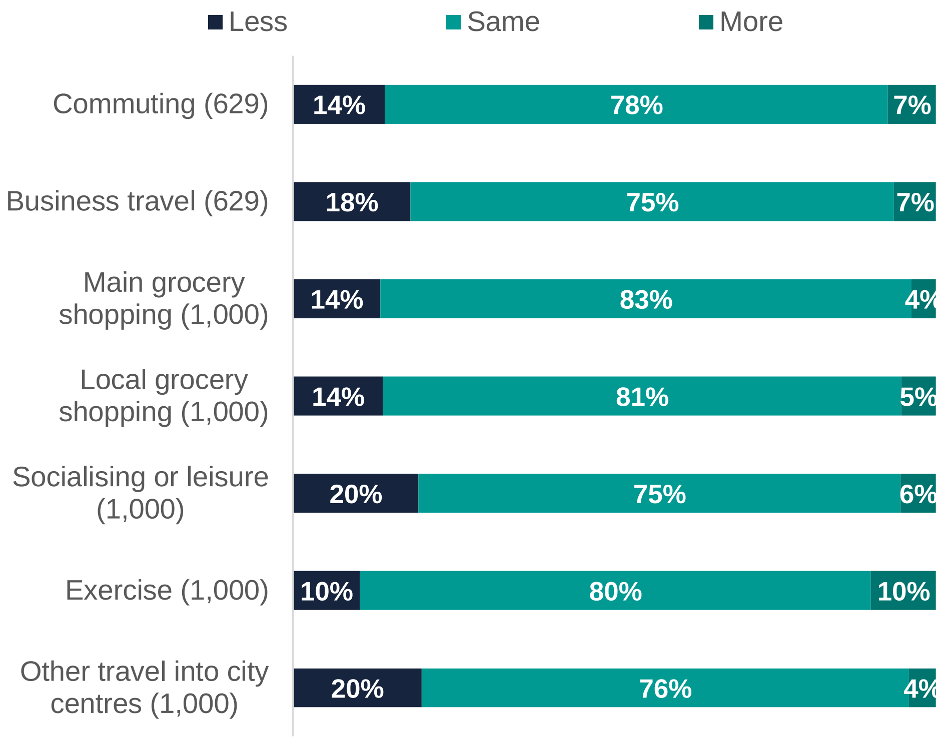
Cost of living crisis - journey purpose

In response to the cost-of-living crisis the majority of respondents said they wouldn't make changes to their reasons for travel.

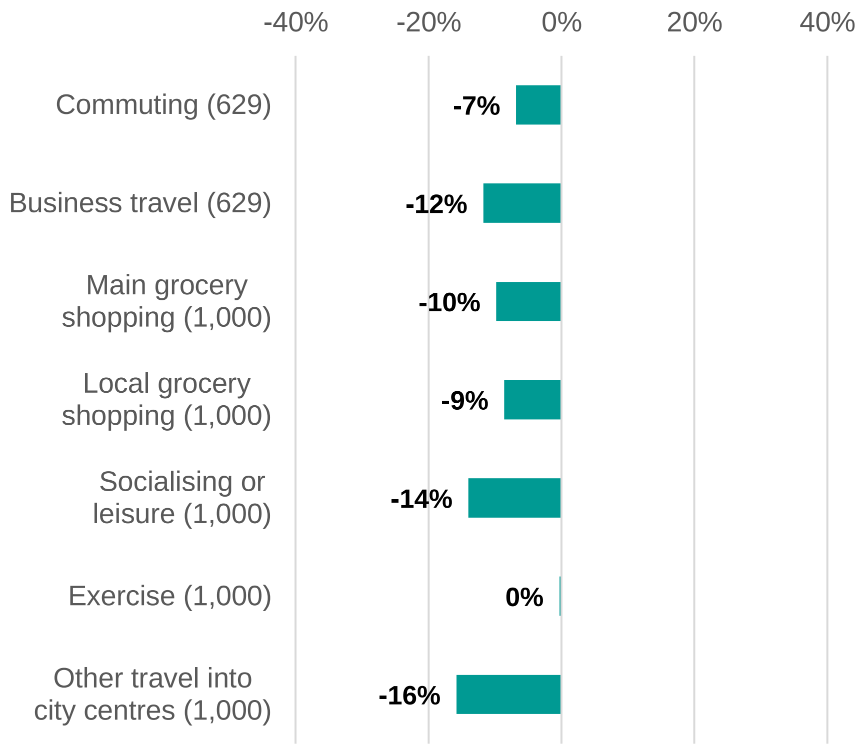
However, of those that would make changes, respondents said they were more likely to reduce journeys for socialising or leisure and trips into city centres (excluding work).

Exercise was both the least likely to be reduced and the most likely to be done more.

Change in journey purpose as a result of the cost of living crisis



Net change in journey purpose



Q: Still thinking about the cost-of-living crisis, do you expect to travel for any of the following reasons more/same/less: commuting/ business travel/drop children at school/main grocery/local grocery/social or leisure/exercise/other travel into city centres

Demographics

Survey respondent demographics

Age	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
16-34	319	31.9	32.4
35-64	464	46.4	46.8
65+	210	21.0	20.8
Prefer not to say	7	0.7	-
Total	**1000**	**100.0**	**100.0**

Sex	Survey responses (count)	Survey responses (%)	West Yorkshire Population (%)
Male	483	48.3	49.2
Female	512	51.2	50.8
Other	2	0.2	-
Prefer not to say	3	0.3	-
Total	**1000**	**100.0**	**100**

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**

The tables here allow comparison of the demographic profile of survey respondents with population data published by the Office of National Statistics (ONS).

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	805	80.5	81.8
Ethnic Minority	180	18.0	18.2
Prefer not to say	15	1.5	
Total	**1000**	**100.0**	**100.0**