

Covid-19 Phase 4 - Travel Intentions Post November lockdown

Travel intentions post the second national lockdown in November and potential plans for Christmas related travel

Methodology

As a result of rising Covid-19 cases a second national lockdown was put in place in England from November 5th to the 2nd December, this lockdown replaced more localised Tier restrictions. During the second lockdown people living in England, must stay at home and avoid travel unless it was for work, education or other legally permitted reasons. Non essential shops and hospitality were closed (with the exception of takeaway services). Essential shops, schools/colleges and universities remained open.

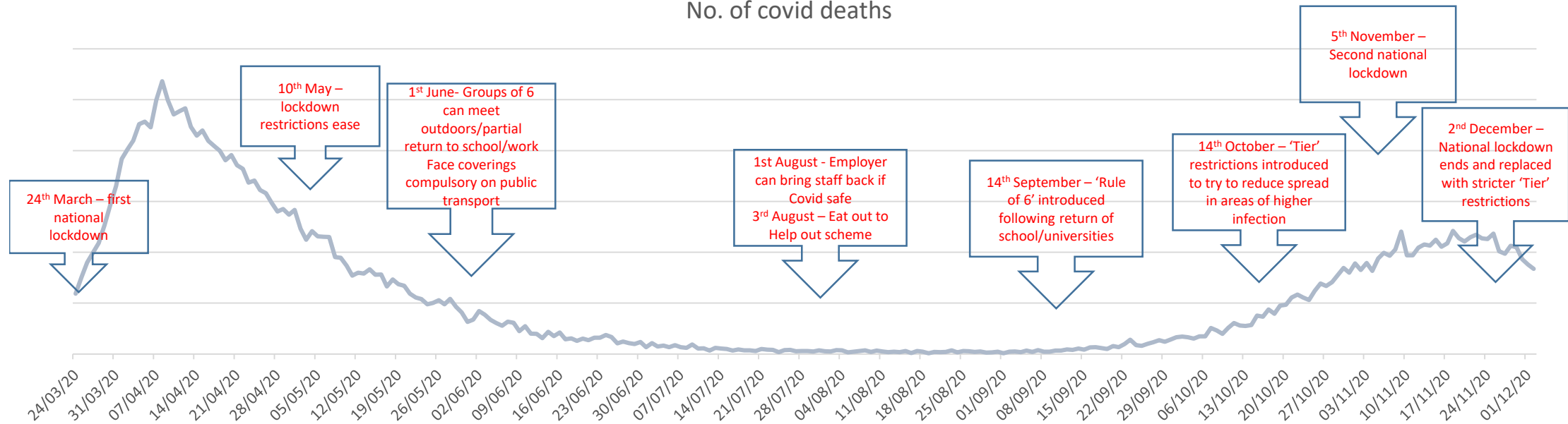
TfWM has tracked travel behaviour throughout the Covid-19 pandemic in the P1 – P3 Covid-19 Travel Surveys. The P4 Covid-19 travel survey looks at travel patterns during the second lockdown period and travel intentions post lockdown as restrictions are lifted, including any potential Christmas related travel. The results will be used to support transport planning as the lockdown is lifted and ensure that the west midlands transport network continues to meet the needs of its residents.

The survey was live from the 11th November to 30th November 2020. It was emailed to members of the Human Intelligence Teams's respondent database as well as being promoted on social media. All completed surveys were eligible to be entered into a prize draw with a chance to win one of 3 prizes of £50 in Amazon Vouchers.

In total 916 responses were received, where relevant results are compared to previous Covid-19 survey phases.

Survey timeline

No. of covid deaths



March	April	May	June	July	August	September	October	November
		P1	P2			P3		P4
		Travel Change	Operational change			Future Travel		Travel Post Lockdown

Key findings

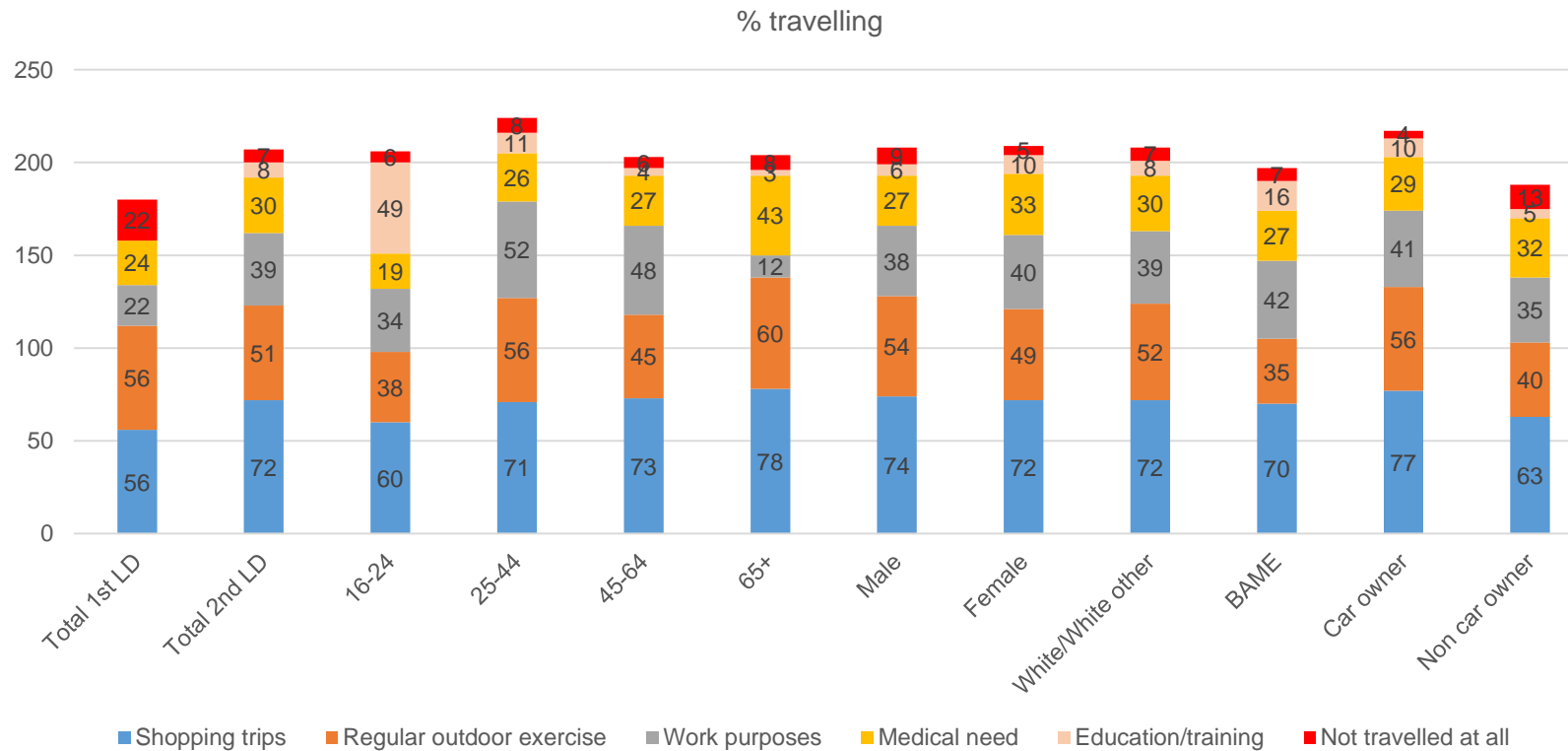
- More people were travelling during the second lockdown compared to the first, shopping and outdoor exercise were the main reasons for travel, with car owners more likely to make trips than non car owners.
- Car was the main way to travel during lockdown, particularly for shopping trips (55%), however, just under a third were travelling to work or education by bus.
- During the second lockdown, car owners had become more reliant on car travel and less reliant on public transport, especially for work trips where car use increased from 42% to 53%. Non car owners had reduced bus use and replaced it with more walking trips, particularly for shopping purposes where bus use decreased (from 65% to 51%) and walking increased (from 21% to 40%).
- The vast majority of respondents would continue to travel by the same mode post lockdown, this rose to 92% amongst commuters; dipping to 86% amongst scholars. Of the 44 respondents who would change mode 56% would return to using the bus, 11% to rail.
- Similar proportions (two fifths) were found to be working from home or working from their usual location. The proportion working at their usual location was at its highest level since monitoring began, and while home working had increased from the last survey wave, it had not returned to levels seen at the start of the pandemic. That said, home working seemed likely to continue with 80% of those working from home thinking they would do so post-lockdown.
- Over a third of those not currently travelling by public transport would return when the second lockdown eases - public transport use was effected by the current restrictions on meeting friends/families and access to leisure facilities. A third, however, would not return to public transport until there was a vaccine.
- Post 2nd lockdown, respondents were most likely to want to visit friends/family in their own home (73%), only half intended on going Christmas shopping. Younger respondents were most likely to take part in leisure and shopping activities post lockdown.
- While trips post lockdown would mainly be made by car; particularly those made to meet friends/family at home, over a third would make Christmas shopping trips by bus. Birmingham City centre and Merry Hill would be the main shopping locations, with bus being the most popular mode of travel to Birmingham City centre and car the most popular way to get to Merry Hill.
- Christmas shopping plans this year would see an increase in online shopping for gifts (50%) and food (26%). A third would shop more at local retailers, while a fifth would give more cash/vouchers as presents. 1 in 10 people commented that they had already done their Christmas shopping prior to lockdown.
- Further restrictions would affect two thirds of people's Christmas plans, however, 38% of respondents realised Christmas would be restrictive/not a normal Christmas this year.

Travel during 2nd Lockdown

Type of journeys made during the 2nd lockdown and any changes in travel patterns

Reasons for travelling

More people were travelling during the second lockdown compared to the first, shopping and outdoor exercise remained the main reasons for travel, with car owners more likely to make trips than non car owners

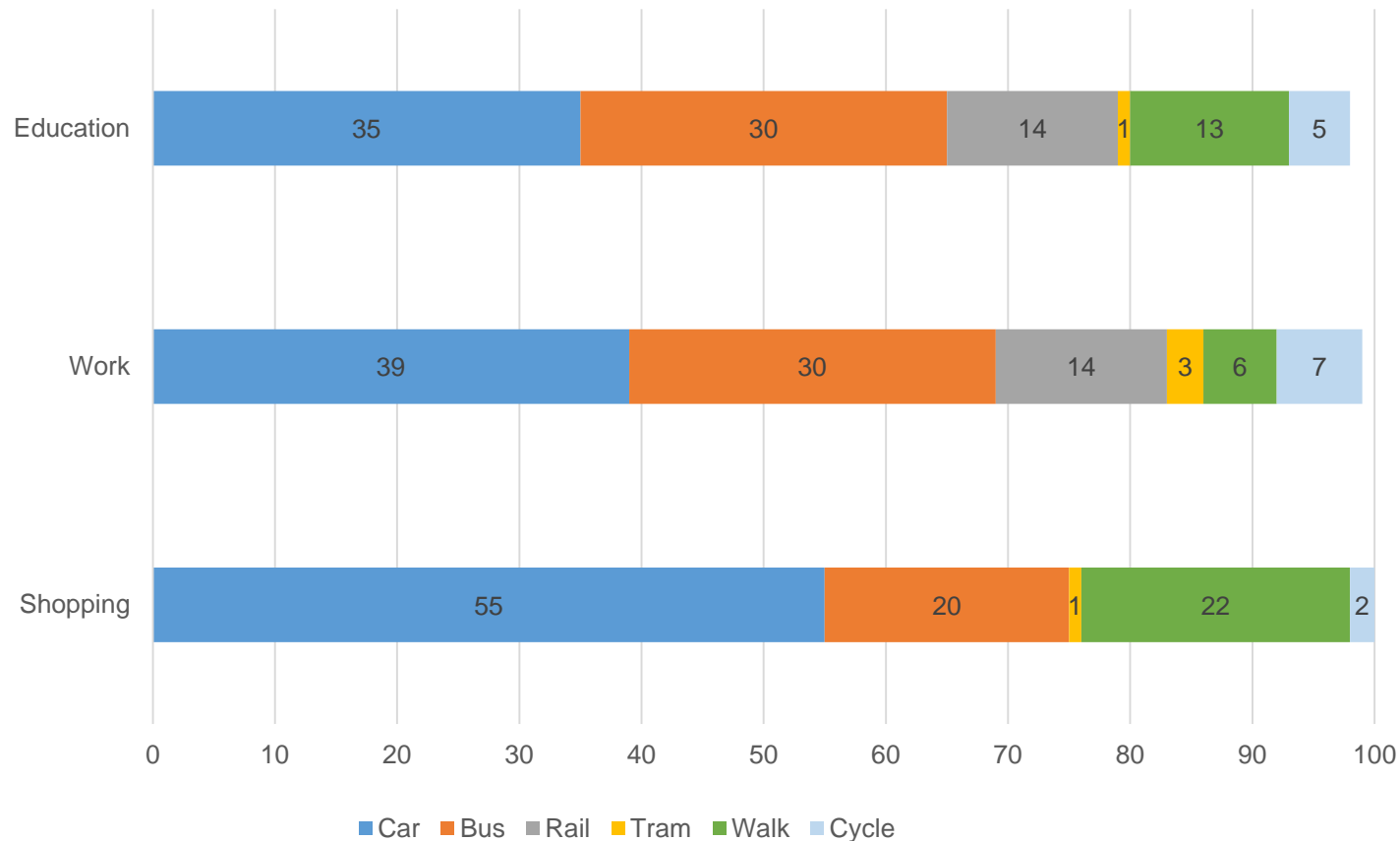


- The main reasons for travel during the 2nd lockdown were shopping (72%) and exercise (51%).
- 39% travelled to work, 30% for medical needs and 8% for education.
- 7% had not travelled - a much lower figure than the 22% reported during the 1st lockdown.
- Car owners were more likely to have made trips than non car owners – 13% of non car owners hadn't travelled compared to 4% of car owners.

Question: Since the start of the second lockdown, which of the following journeys, if any, have you made? Base 902 respondents; % exceed 100 due to multiple travel reasons

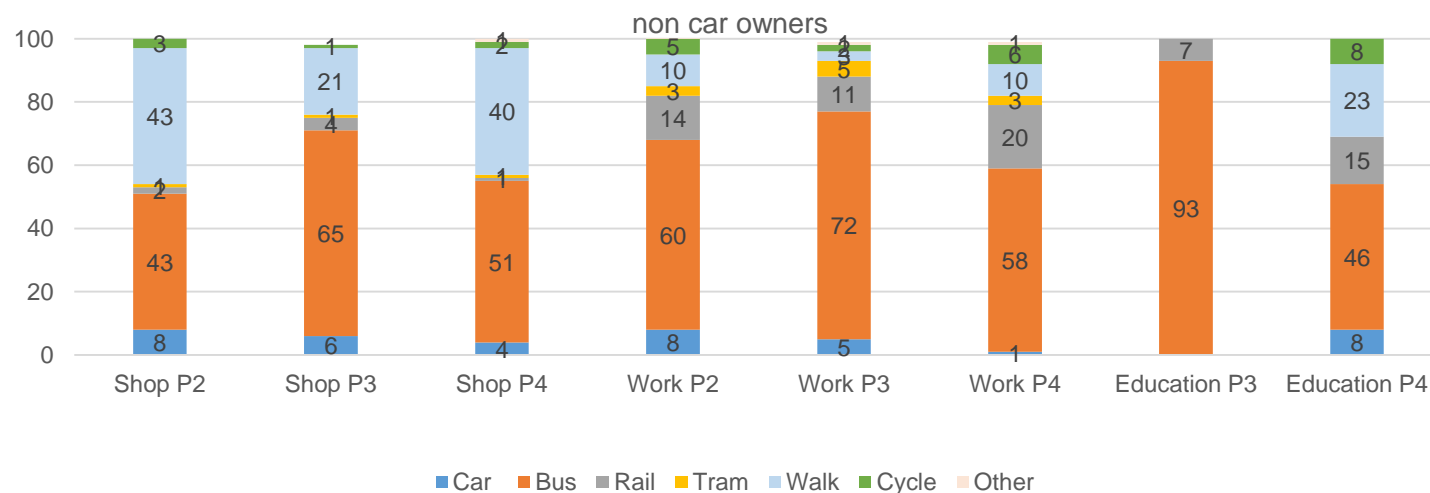
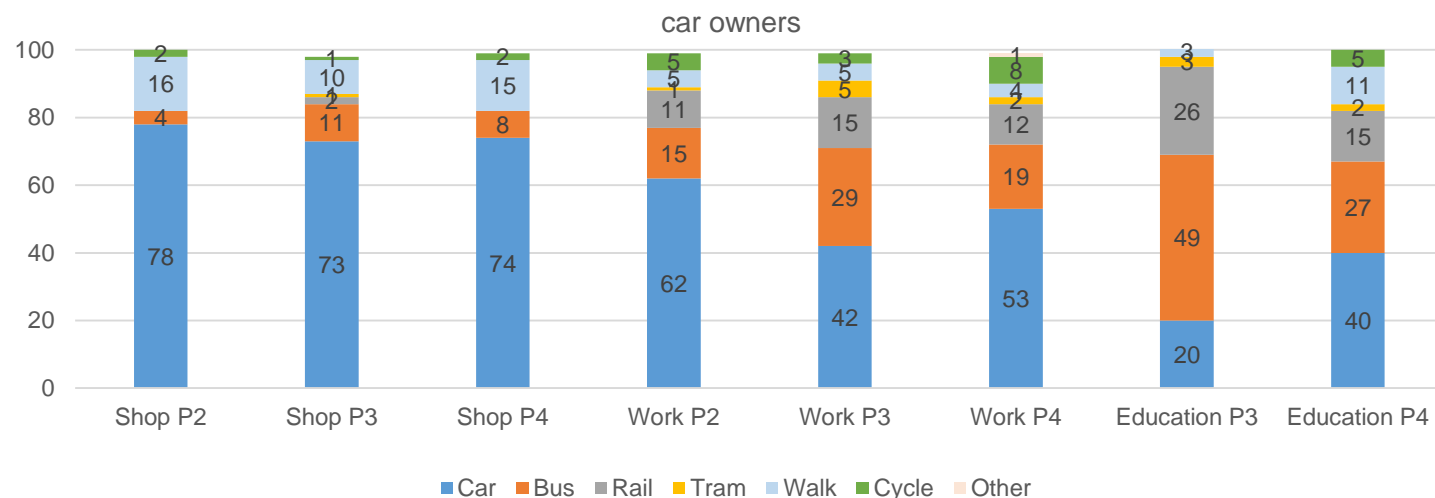
Mode of travel

Car was the main way to travel during lockdown, particularly for shopping trips, however just under a third were travelling to work or education by bus



- Car was the main mode of travel during the second lockdown particularly for shopping (55%). Two fifths travelled by car to work and just over a third to education.
- Bus use peaked at 30% for work and education trips, while 14% of commuters and scholar travelled by rail.
- 7% of commuters were cycling.

Trends in Mode of travel



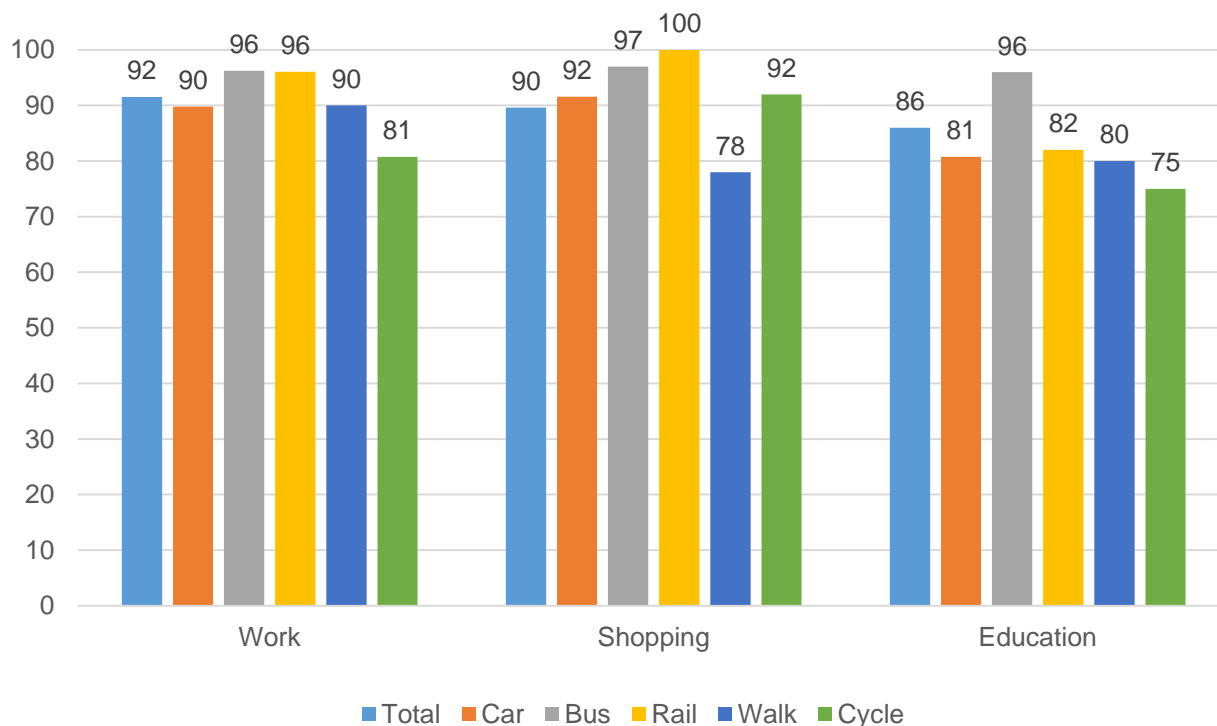
During lockdown car owners had resumed their reliance on car travel while non car owners had reduced bus use and replaced it with more walking trips

- Compared to P3 survey results, car owners were more likely to travel by car and less likely to use public transport. This was especially apparent for trips to work (car use increased from 42% to 53%) and education (car use increased from 20% to 40%).
- Amongst non car owners, although bus remained the main mode of travel during lockdown there was a decline in use compared to P3. This was particularly so for shopping (bus use decreased from 65% to 51%) whilst walking saw an increased share of these trips (21% to 40%).

Travel intentions post lockdown

The majority of respondents would continue to travel by the same mode post lockdown, particularly those travelling for work and shopping purposes.

% who will travel by same mode



- 92% of commuters and 90% of shoppers will travel by the same mode following lockdown, this figure dipped to 86% amongst those making education trips.
- Those travelling currently by bus were least likely to change mode; while walkers and cyclists were more likely to change particularly those walking to shops (78%) and those cycling to school (75%) or work (81%).
- Amongst the 44 respondents who would change mode, the most likely change would be to travel by bus (56%), or walk (20%). 11% would return to train.

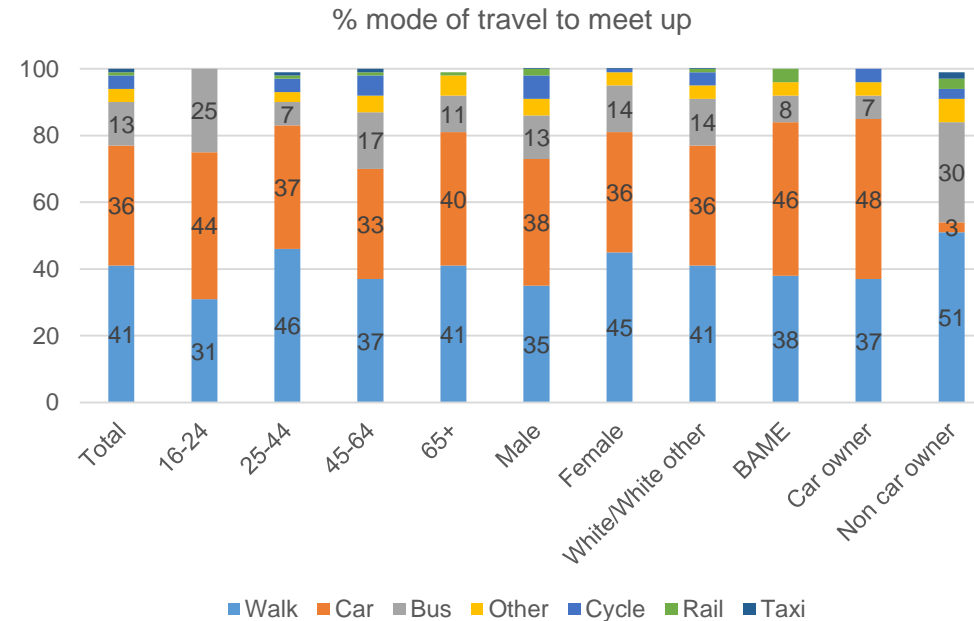
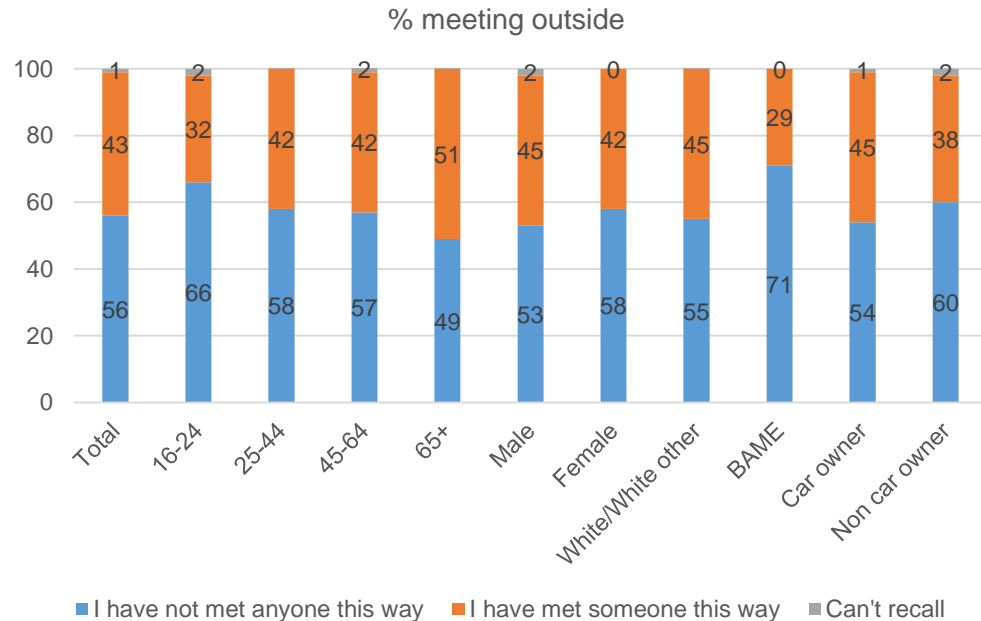
Change of mode	All	Work*	Education*	Shopping*
Bus	25 (56%)	7	5	13
Rail	5 (11%)	3	1	1
Cycle	6 (14%)	2	2	2
Walk	9 (20%)	0	0	9
Taxi	3 (7%)	0	0	3
Tram	1 (2%)	0	0	1
Base	44	10	5	29

Question: Will this be your main method of travel to/from work as the second lockdown travel restrictions are eased? Base 650 Shopping; 355 work; 76 education.

Question: How do you think you will mainly travel when making these journeys to/from as the second lockdown travel restrictions ease? Base work 10; Education 5; shopping 29 *NB caution advised when looking at numbers by journey purpose due to low base

Meeting people during lockdown

Only around half of people had met up outside during lockdown, most people walked or travelled by car when making these trips

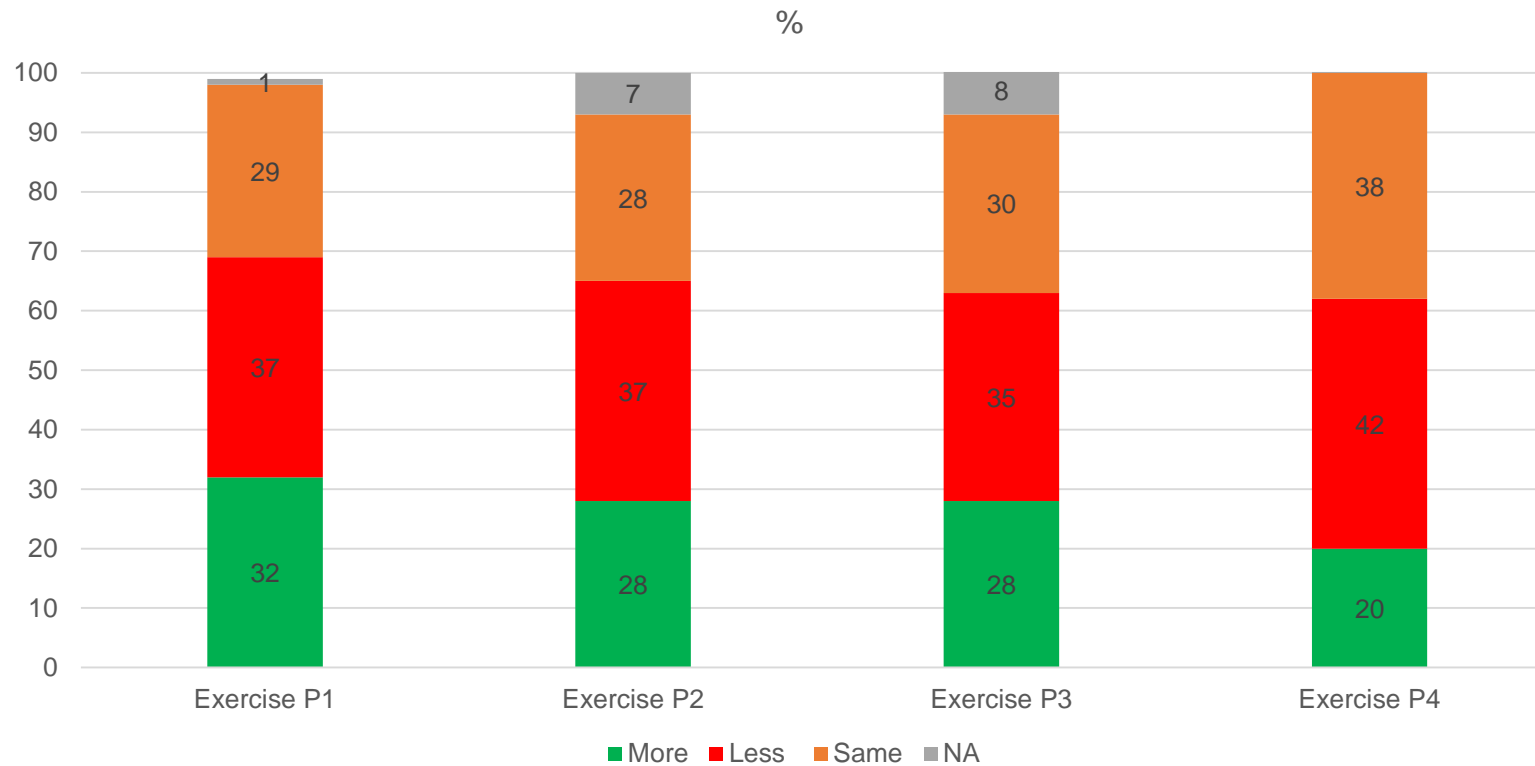


- Just over half of respondents had met one person from another household outside during the lockdown. This rose to 66% amongst those aged 16-24 and to 71% amongst those from BAME backgrounds.
- When meeting up, respondents tended to walk (41%) or travel by car (36%) to their meet-up location. Only 13% would travel by bus, albeit this rose to 30% amongst non car owners and to 25% amongst those aged 16-24.

Question: Since the second lockdown, you are allowed to meet one person from another household as you long as you are outside and two metres apart. Have you met with anyone in this way? Base 837 respondents; Question: How did you mainly travel when making these journeys? Base 361 respondents who had met up with people.

Exercise level during lockdown

Over two fifths or respondents thought they were exercising less since the start of the pandemic, with this figure being at its highest level since the Covid monitoring surveys started.



- The second lockdown illustrates the detrimental effect of lockdown on people's exercise levels. [NB Some of this may be seasonality as other waves were conducted in Spring/Summer]
- Nevertheless, 42% considered they were exercising less since the start on the pandemic.
- In this phase, the proportion who thought they were exercising more was at its lowest level (20%).
- Those most likely to be exercising less were female (44%) and those from the youngest and oldest age groups (45% equally).

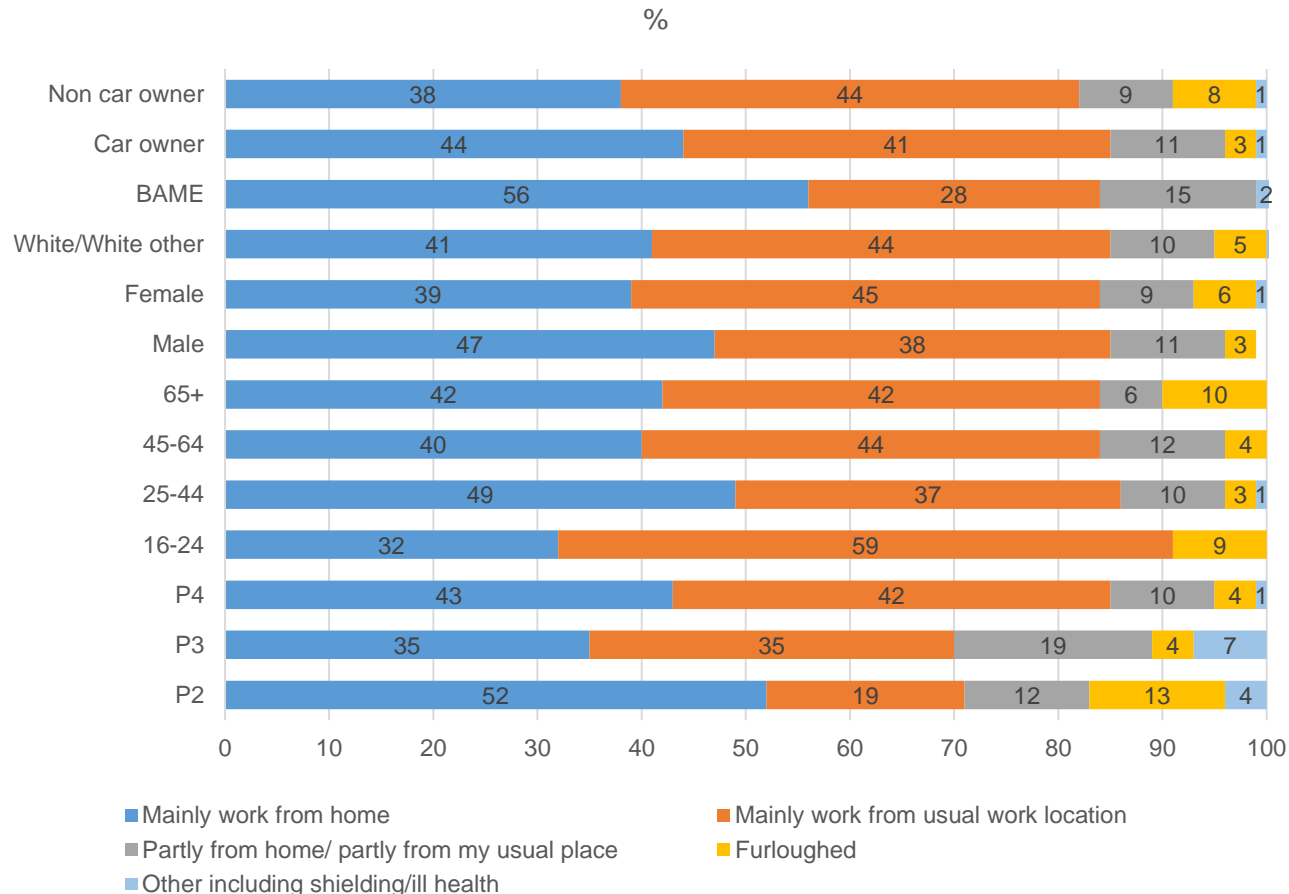
Question: Overall, do you think you are doing more, less or about the same amount of exercise as you were doing before the Coronavirus (COVID-19) outbreak? Base 900

Working patterns during lockdown

Level of home working during lockdown and potential changes post lockdown

Work patterns

During lockdown similar proportions were working from home or working from their usual location. The proportion working at their usual location was at its highest level since monitoring began

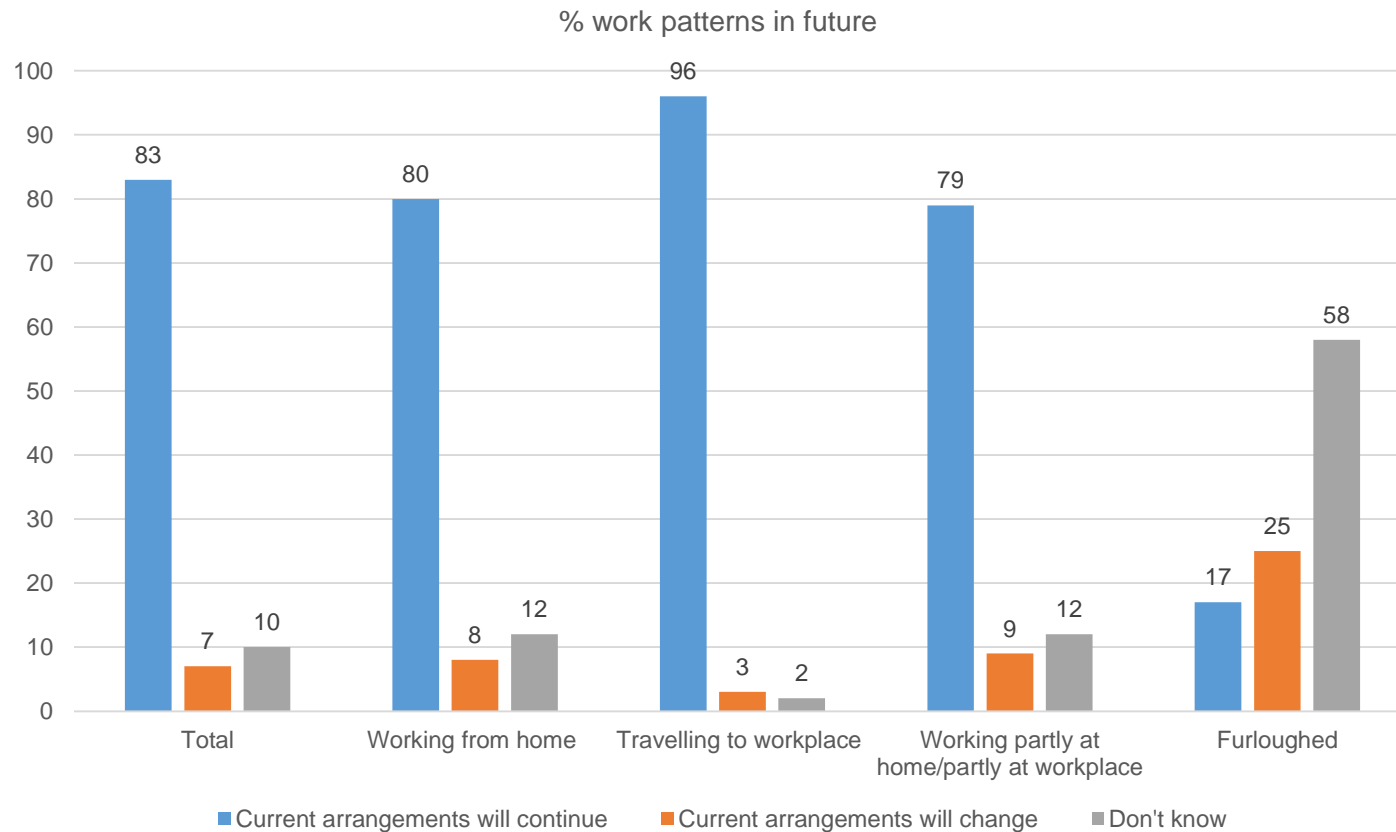


- 43% were working from home, this had increased from the last wave of surveys (35%), albeit it wasn't as high as figure reported at the start of the pandemic (52%).
- 42% were working at their usual location with this figure being at its highest reported level since the surveys began.
- Fewer respondents were working partly at home/partly at usual location (10% from 19%), while there was also a decline in the proportion shielding.
- Younger people (59%) were most likely to be working from their usual location.
- Male respondents (47%) and car owners (44%) were more likely to be working from home.

Question: Which of the following best describes the way you work currently? Base 558 respondents in employment

Work patterns post lockdown

80% of those working from home thought this would continue post lockdown; as did 79% of those doing a mix of work from home/work at usual location



- Working from home seemed to be likely to continue for many post lockdown with 80% thinking this arrangement would continue.
- 79% working partly from home partly at work also thought that this arrangement would continue.
- Those on furlough were most uncertain about their future (58%, don't know)

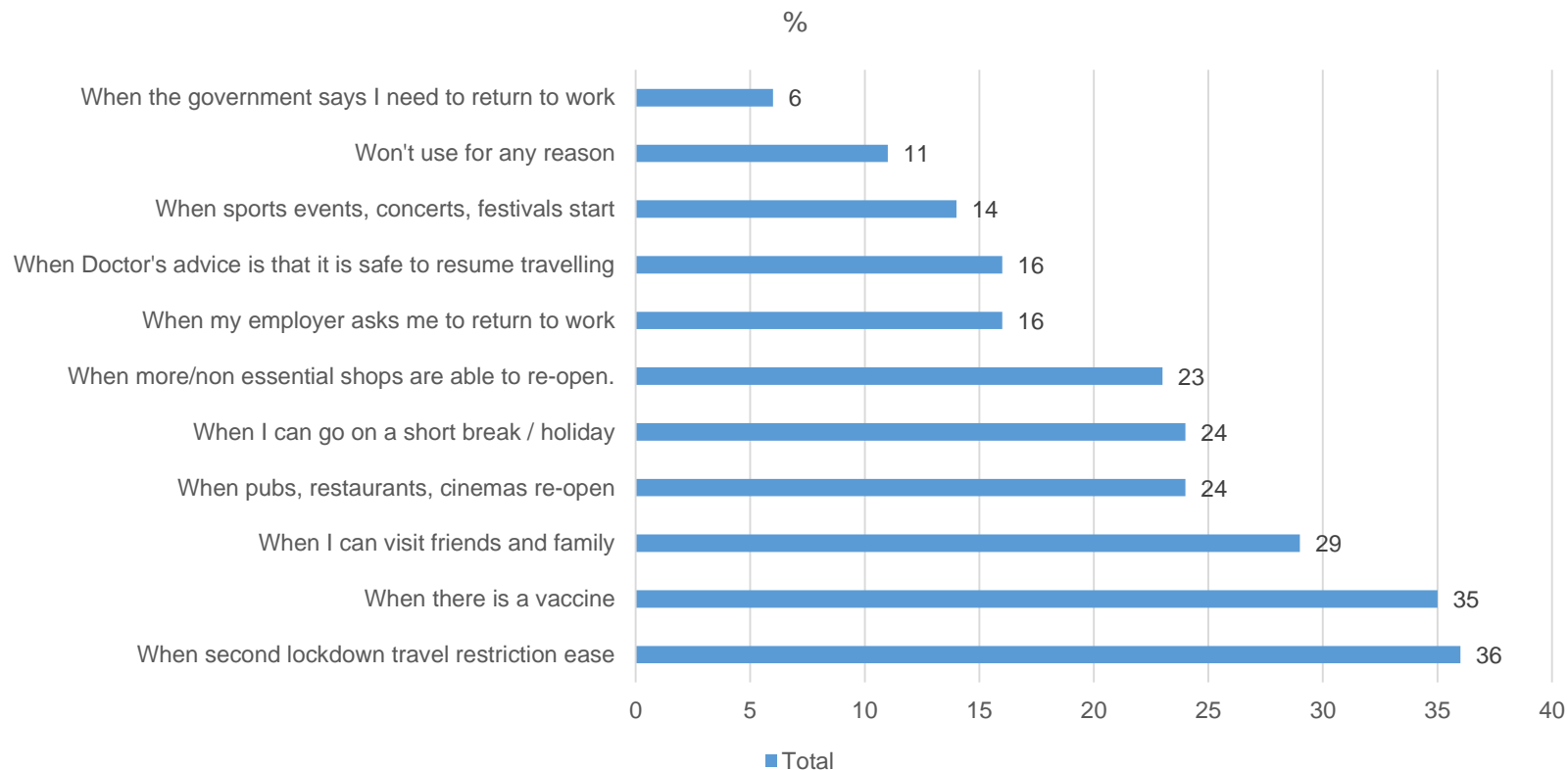
Question: Do you think this arrangement will continue after the second lockdown travel restrictions are eased? Base 557 respondents in employment

Travel intentions post lockdown

Return to public transport use and travel intentions post lockdown

Future public transport use

Over a third of those not currently travelling by public transport would return when the second lockdown eases. Restrictions around leisure activities and visiting friends/family were also stopping some from returning to public transport. A third would not return until there was a vaccine.

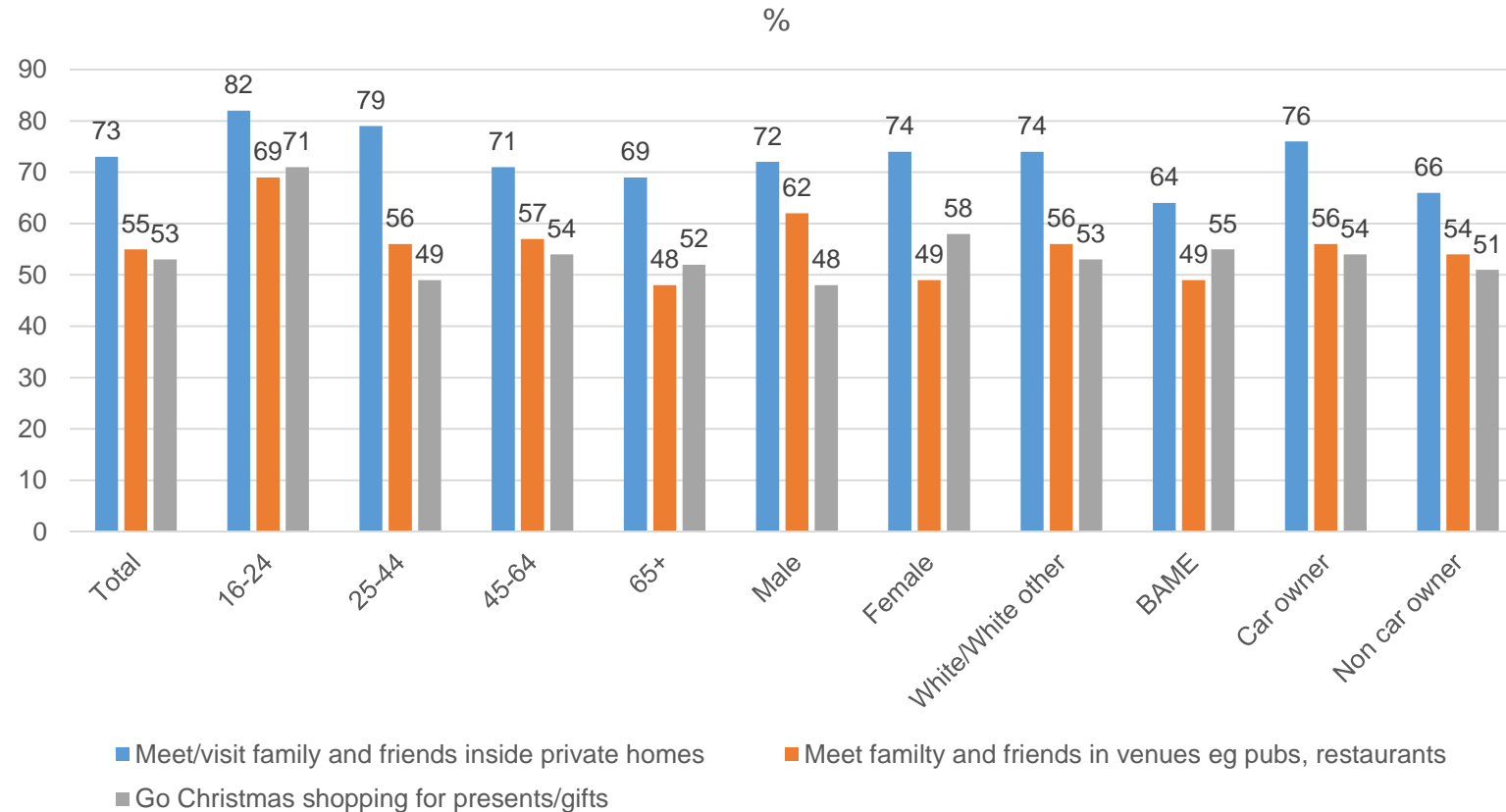


- Over a third (36%) would start to travel by public transport again as lockdown restrictions ease. However, a similar proportion (35%) will only return to public transport when there is a vaccine.
- 29% would return when restrictions around visiting friends and family are removed – this figure rose to 47% amongst non car owners.
- A quarter would reuse when restrictions around leisure facilities, holidays and non essential shops are lifted.
- 16% would return to public transport use when their employer asks them to return to work.

Question: Under which of the following circumstances, if any, would you consider using public transport? Base 607 respondents who had not travelled by public transport during lockdown. % exceed 100 due to multiple responses

Return to leisure activities

Respondents were most likely to want to visit friends/family in private homes post lockdown, particularly younger respondents. Only half intended to go Christmas shopping.

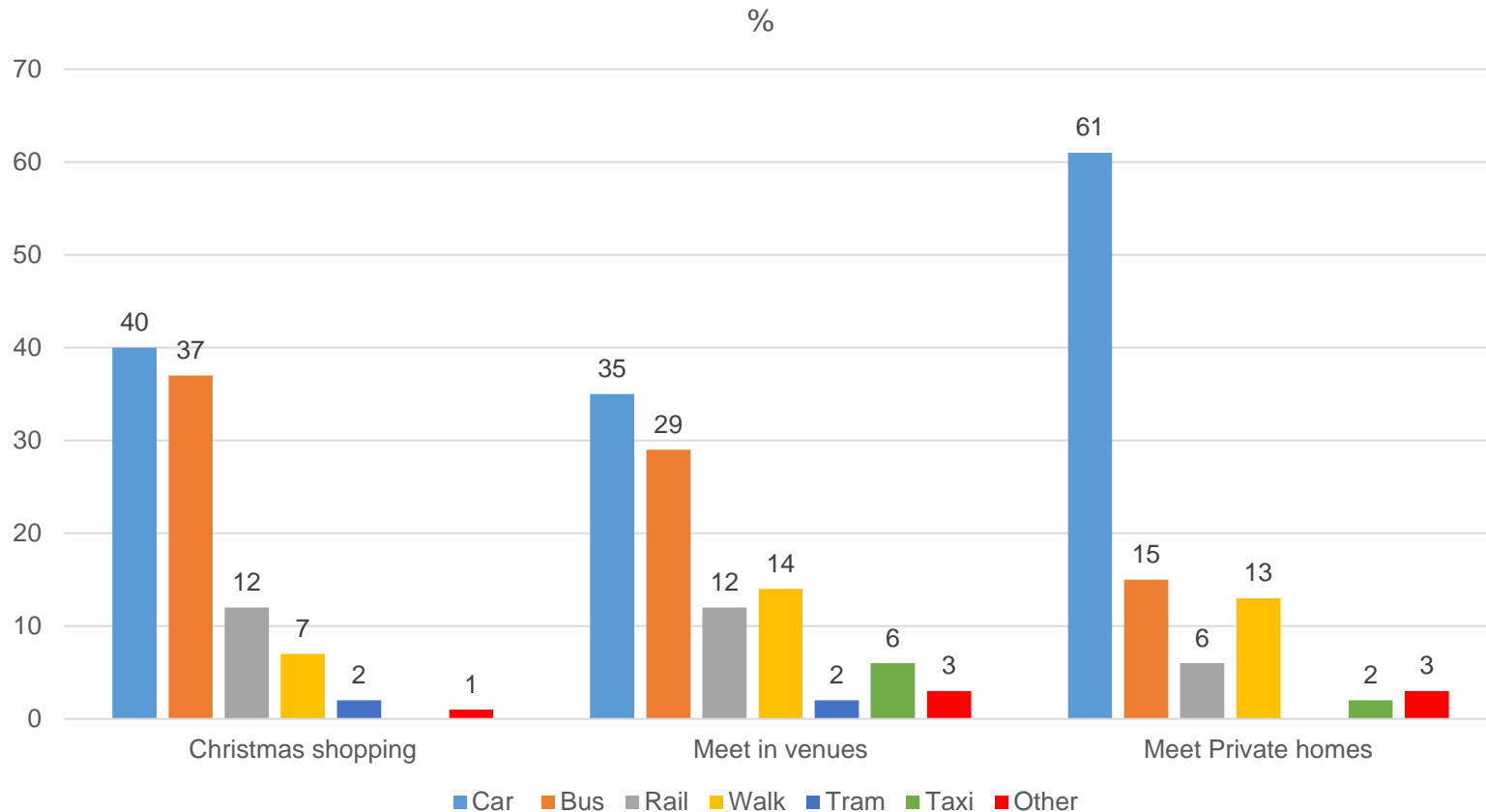


- 73% of respondents intended to return to meeting friends/family in private homes.
- Only just over half intended to meet friends and families in leisure venues (55%) or go Christmas shopping (53%).
- Respondents aged 16-24 were most likely to take part all activities after lockdown – as 82% would visit friends and 71% would go Christmas shopping.

Question: Which of the following do you intend to do after December 2nd (assuming restrictions are eased sufficiently to allow these activities)? Base 819 respondents

Potential mode of travel for trips

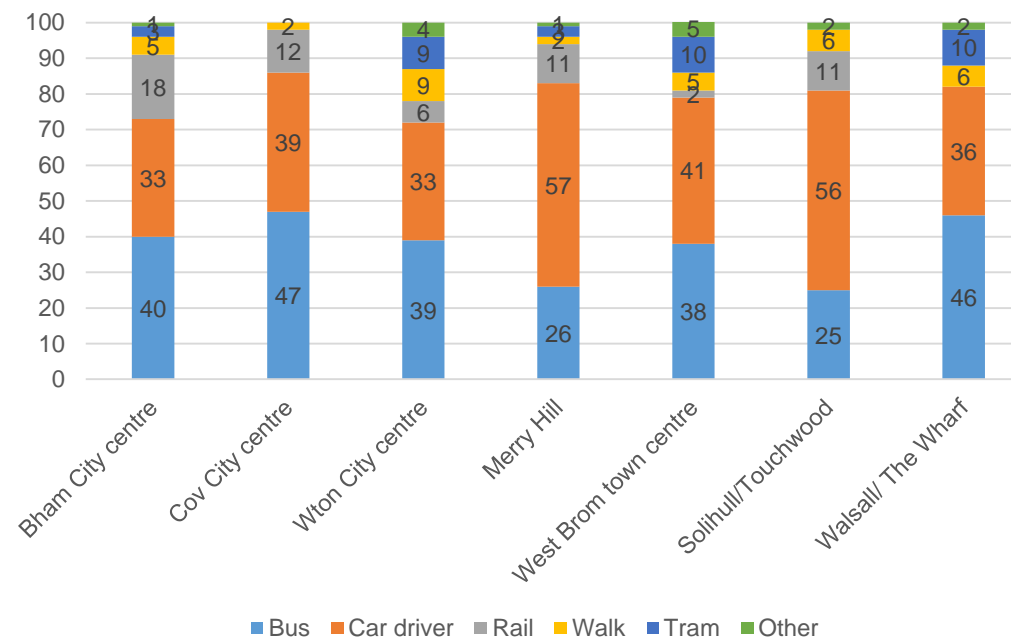
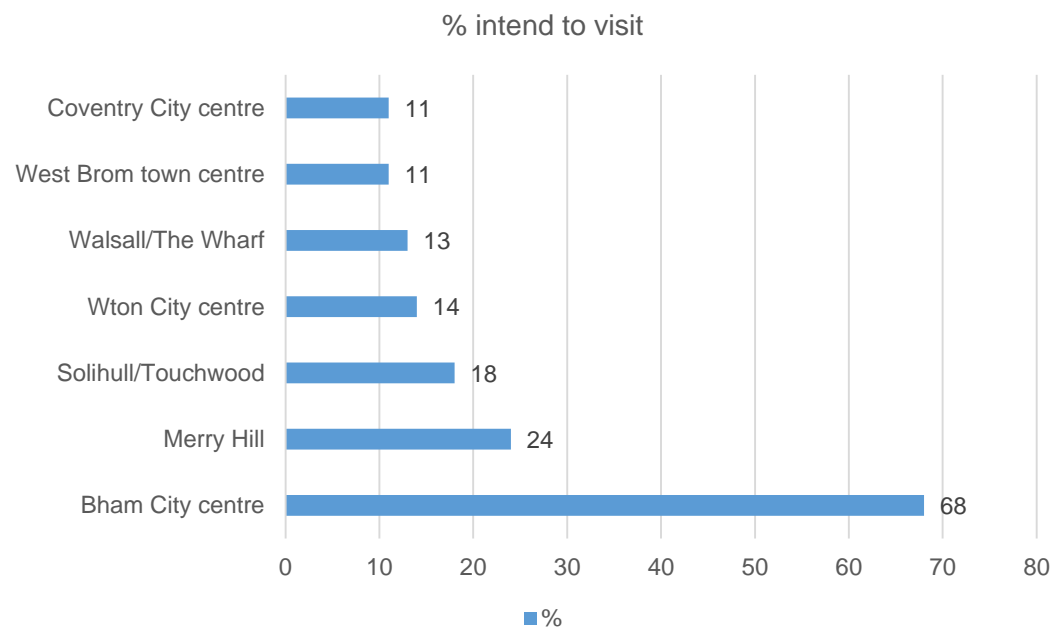
While trips post lockdown would mainly be made by car; particularly those to meet friends/family in private homes, over a third would make Christmas shopping trips by bus



- Car would be the main mode of travel for all journeys, particularly to meet in private homes (61%), while two fifths (40%) would travel by car for Christmas shopping.
- However, 37% would travel by bus for Christmas shopping and 29% would do so to meet up in leisure venues.
- Roughly 1 in 10 would consider making shopping trips or meeting friends in venues by rail.

Christmas shopping venue

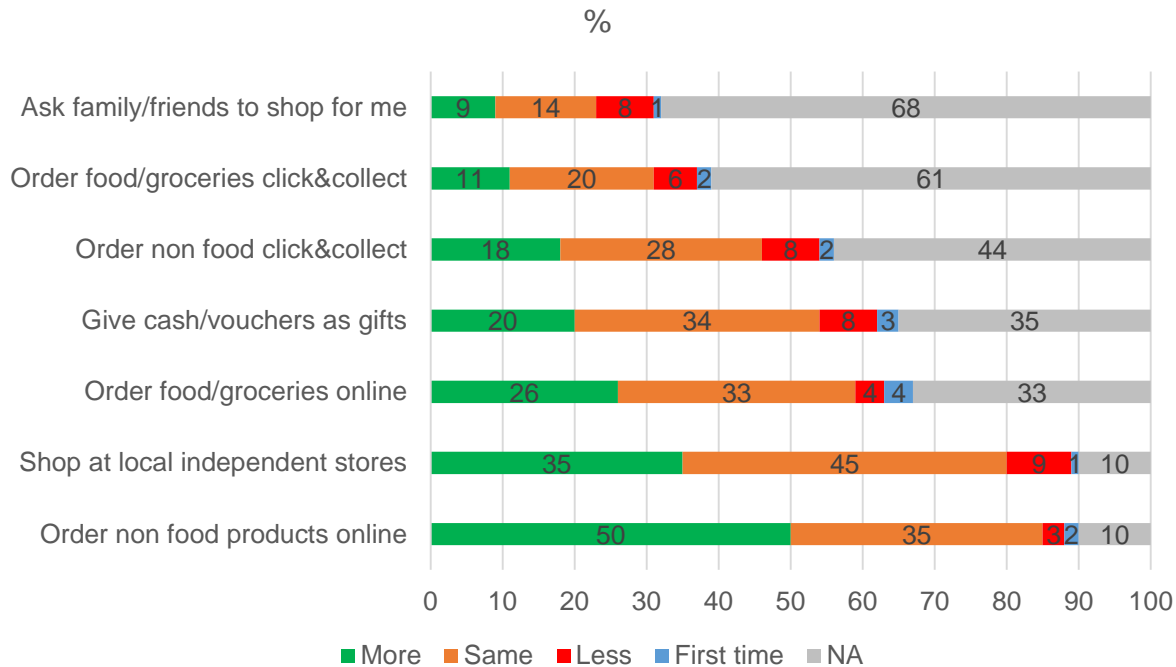
Birmingham and Merry Hill were the most popular Christmas shopping locations. Bus would be the main mode of travel to Birmingham, while car would be the main mode to Merry Hill



- Birmingham City Centre (68%) and Merry Hill (24%) would be the most popular shopping locations, followed by Solihull (18%).
- Bus would be the main mode of travel to Birmingham, Coventry and Wolverhampton City centres; while Merry Hill and Solihull were most likely to be accessed by car

Christmas shopping habits

**This year respondents felt they were likely to shop online more for gifts and groceries.
Shopping at local independent retailers would also be more popular**



	16-24	25-45	45-65	65+	Male	Female	White/ White other	BAME	Car owner	Non car owner
Order non food products online	57	61	49	37	46	54	50	46	53	43
Shop at local independent stores	53	38	35	29	31	39	35	36	37	32
Order food/groceries online	25	30	28	18	25	27	25	26	25	28
Give cash/vouchers as gifts	19	17	22	23	18	22	21	16	21	20
Order non food click&collect	26	26	17	11	17	21	18	25	22	10
Order food/groceries click&collect	15	16	9	8	12	11	11	19	13	8
Ask family/friends to shop for me	15	8	8	9	8	9	8	17	8	10

- This year respondents felt they were more likely to buy gifts (50%) and groceries (26%) online. 35% would shop more at local independent stores, particularly respondents aged 16-24, females and car owners.
- A fifth were more likely to give cash or vouchers this year.
- Fewer were more likely to use Click&Collect services or get friends and family to shop for them. Click&Collect appealed most to younger respondents and those from BAME backgrounds.

Question: Thinking about the following types of preparations and activities surrounding Christmas and the New Year this year, which are you intending to do more of, less of or do for the first time this year? Base all respondents

Further comments on Christmas shopping

A third stated they will shop more online this year, while 1 in 10 felt they had done most of their shopping before lockdown

	%
Will shop more via Internet/online	32
Have done most of it already/all done before lockdown	11
Will go to high st as usual/back to shops when able/prefer shops to online	11
Will shop more locally/independent retailers	11
Will be buying less/fewer gifts	10
Will be avoiding shops with lots of people	9
Don't know/difficult to make plans	6
Will food shop as usual/fresh food shop as normal	6
Do not/will not celebrate Christmas	5
Will try to visit shops less/be more focused when shopping	5
Shop as usual/same as other years	5
Will be sending cash/vouchers	4
Will be stopping at home over Christmas/less visiting	3
Don't feel safe on Public transport	3

- When giving further details on their Christmas shopping plans 32% re-emphasised they will shop more online this year.
- 11% felt they had done most of their shopping before lockdown.
- A further 11% equally would go back to the high street when the shops opened or would be shopping more locally.
- 10% would be buying less this year.

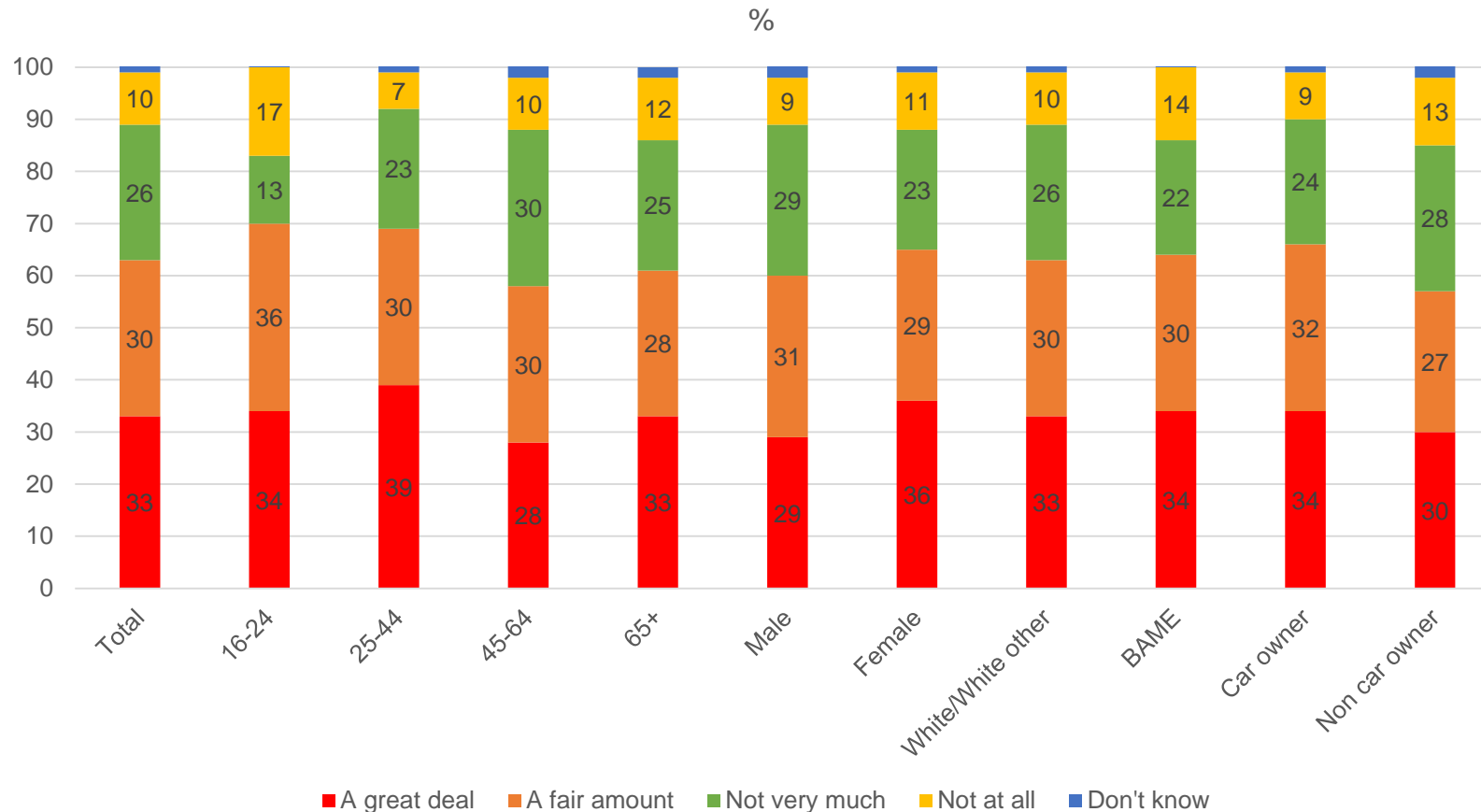
As much as possible will be done on line. Ultimately there will be much less purchased

Hoping to be able to get to shops when restrictions are lifted but likely to be in one big trip rather than several

Did it on my way home from work before shops shut. Doing last bit online

Effect of further restrictions

**Two thirds felt that further restrictions would affect their usual Christmas celebrations.
Only 1 in 10 would be unaffected.**



- 63% of respondents felt that if restrictions were still in place over Christmas that it would have a great/fair amount of effect on their usual celebrations.
- Only 1 in 10 respondents felt that restrictions would have no effect at all.
- Respondents aged 25-44 would be most effected (39%, effected a great deal); those aged 16-24 thought they would be least effected (17%, effected not at all).

Question: If there are restrictions still in place over the Christmas period (eg rule on how many people can meet together or visit each other's home etc), how much, if at all, would it effect your usual Christmas celebrations? Base 902 respondents

Further comments about Christmas plans

People by and large realised that Christmas this year was going to be restrictive/not a normal Christmas

	%
Will be limiting contact over Christmas/won't be a normal Christmas/restricted Christmas	38
Waiting and seeing what restrictions will be/can't plan until know what new guidelines are	13
Christmas will be lonely/will miss seeing people	8
Concern over lack of adherence to rules on Public transport	8
Planning to meet up with family/friends for Christmas	7
No change - Always spend Christmas at home with own household/always have quiet day	6

- 38% felt that Christmas this year was going to be restrictive in some ways (38%).
- A further 1 in 10 felt they can't make plans as they don't know what the guidelines will be at Christmas.
- A significant minority felt Christmas could be lonely this year (8%).

Christmas plans are still very up in the air given we don't know what regulations will be in place

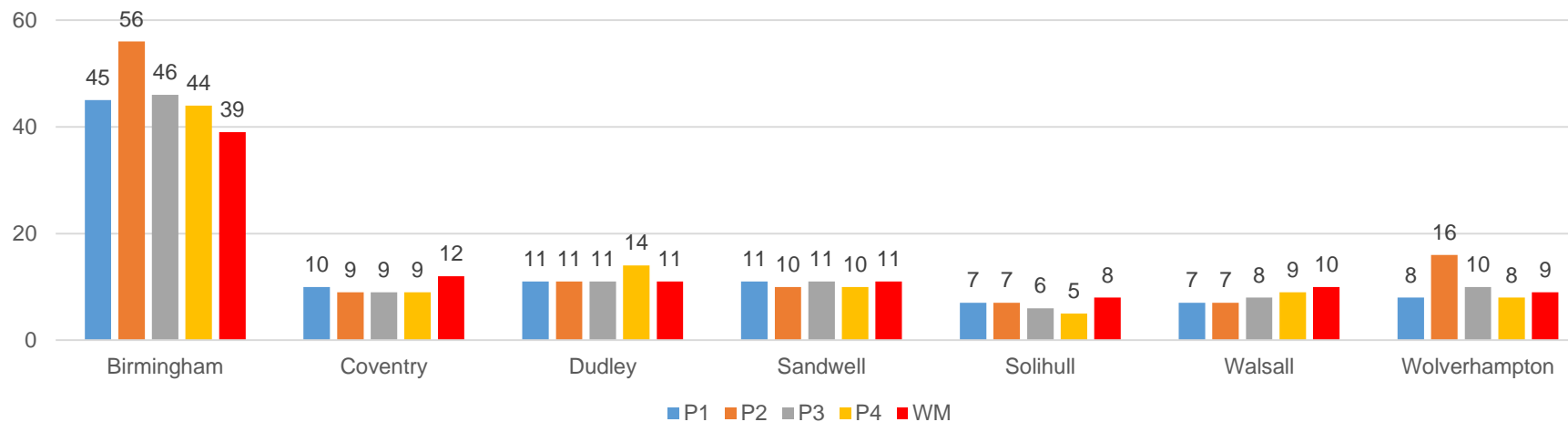
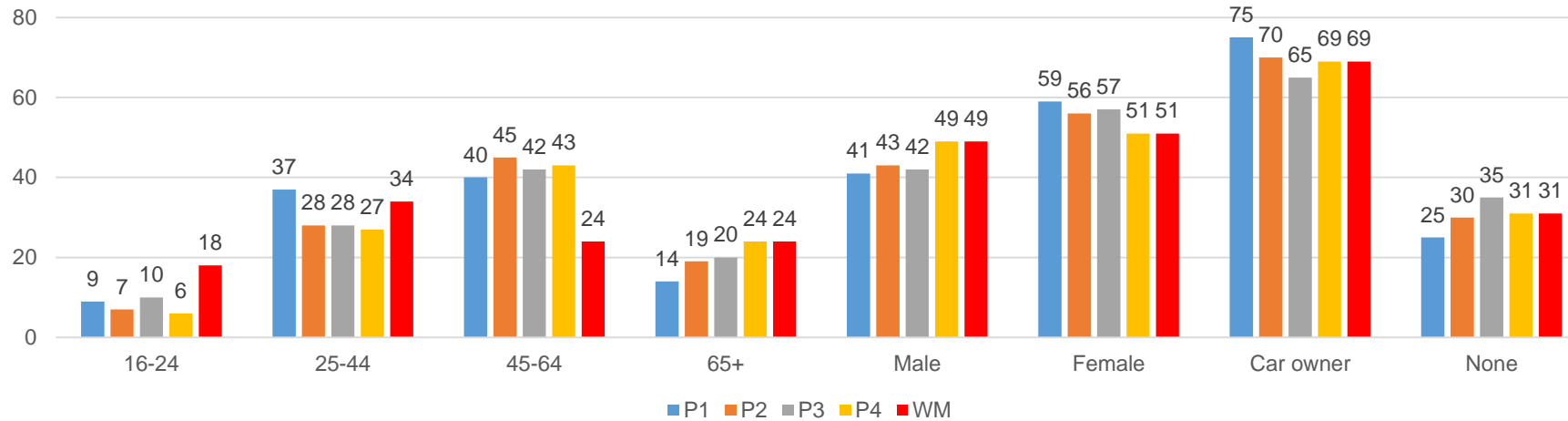
Even when we could meet up with another household, we haven't because the threat of Covid is still high and we don't want to put ourselves or our loved ones at risk

As a single person, it will be a lonely xmas if I can't mix with other households

Respondent Profile

Respondents demographics

Respondent Profile



- As with previous survey phases there was a tendency for respondents to be aged 45-64 (43%) and from car owning households (69%).
- However in this survey phase there was less of a bias towards female respondents (51%).
- As one would expect most respondents came from Birmingham (44%). Dudley had the next highest response rate at 14%.

Home Postcode

