Transport for West Midlands

Covid-19 Note

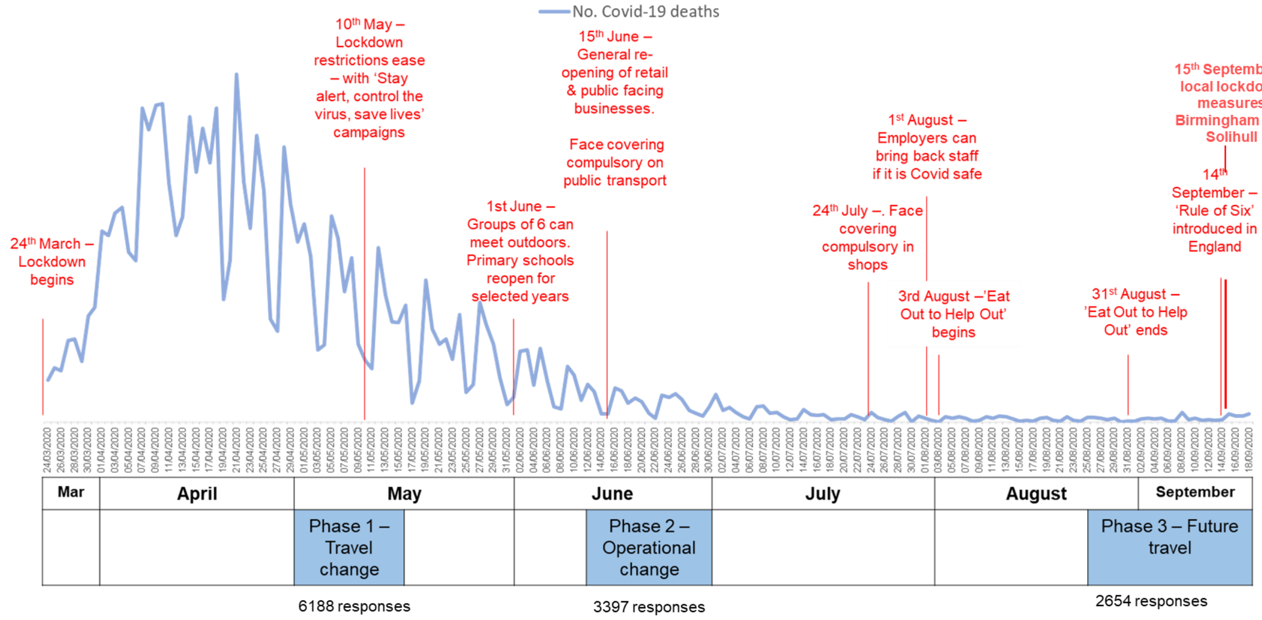
October 2020

Purpose

This note will reflect on the results of three public engagement surveys undertaken by TfWM's Human Intelligence Team since the initial lockdown until mid September. All three phase of Covid-19 Travel Surveys were online survey promoted via WMCA social media channels and emailed directly to members of WMCA/TfWM databases.

Phase 1 took place at the height of lockdown from 30th April to 11th May 2020. Phase 2 took place from 11th June to 1st July following the easing of restrictions around people socialising, doing non essential shopping and the introduction of mandatory face coverings on public transport. Phase 3 took place from 26th August when restrictions on foreign travel and domestic holidays were eased and workers were encouraged to return to work in Covid safe environments and through the 'Eat out to Help Out' scheme. The survey closed shortly after new restrictions, nationally and locally, were introduced. Collectively, over 12,000 responses were received.

Survey Timeline



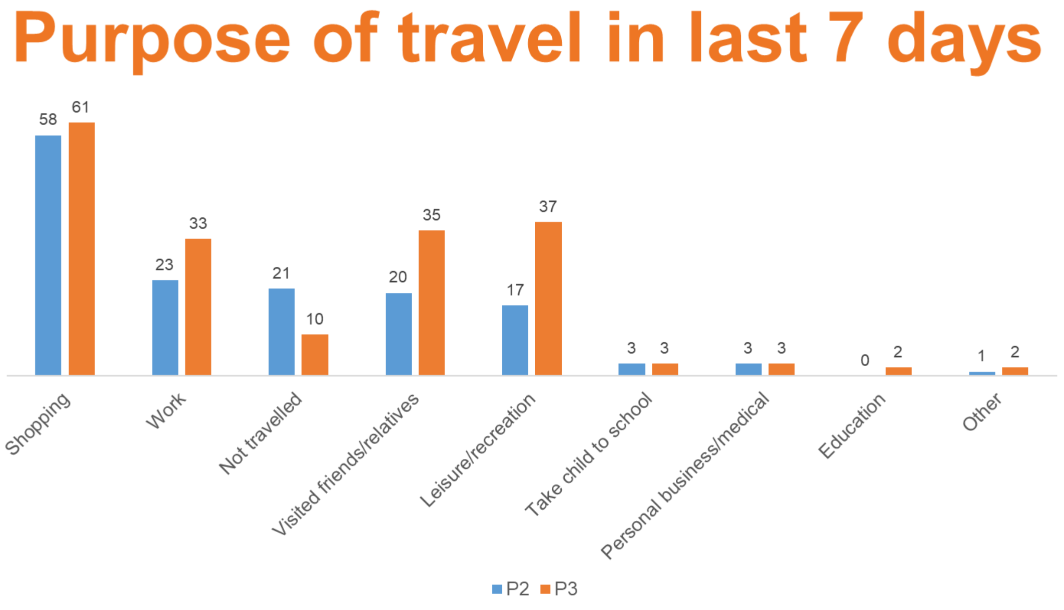
Introduction

The impact of Covid-19 on transport and travel behaviour has been significant. This note will explore, using data and evidence gathered by these surveys, along specific 3 key findings and their related themes.

Key Findings

Public transport has been significantly impacted as a result of the lockdown, and this is likely to continue; evidence demonstrates that modal shift to walking, cycling and driving, along with more working from home, is likely to result in fewer trips being taken by public transport in the future. This will potentially impact the long-term viability of public transport operations.

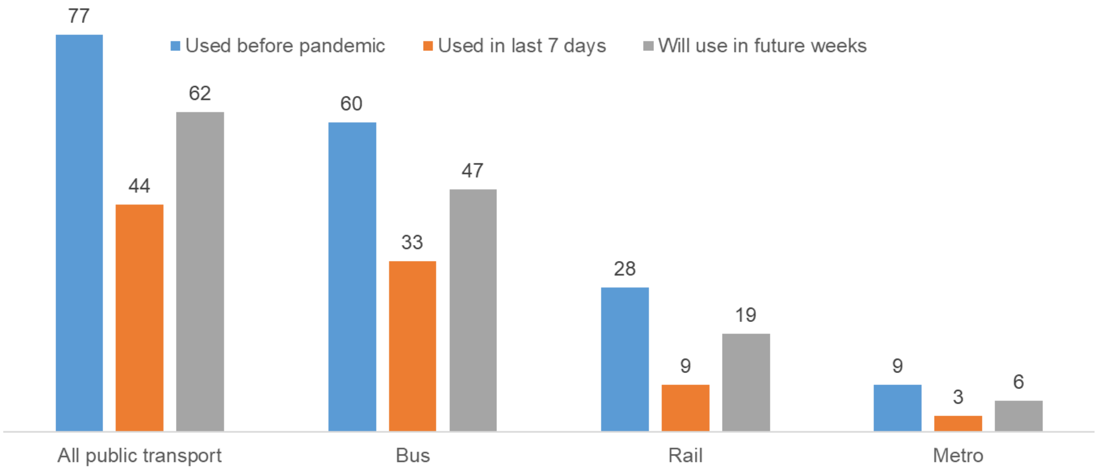
- In lockdown (P1) one in five respondents (22%) had self-isolated and not travelled at all in the complete two months since lockdown in March – 71% had been shopping (essentials only) whilst 22% had travelled to work.
- By mid June, (P2), travel demand was still subdued - 21% has not travelled in the past week – albeit that people were now visit friends and relatives (20%) and make leisure trips (17%) (NB in P1 56% reported that they had 'taken one form of exercise a day').



Question: Thinking about the last 7 days, have you travelled for any of the following reasons?

- By late August (P3) there was a noticeable increase in travel rates, and this was across all journey purposes – with leisure trips (37% v 17% in P2) seeing some of the biggest increases, followed by trips to see friends and relatives (up to 35% from 20%) and work trips (up from 23% in P2 to 33% in P3).
- Despite this upturn in travel witnessed during P3, all evidence suggests that supressed travel demand will be sustained - when comparing public transport use in the coming weeks to current travel and travel pre pandemic, it would seem that the use of public transport will not return to pre pandemic levels (77%).

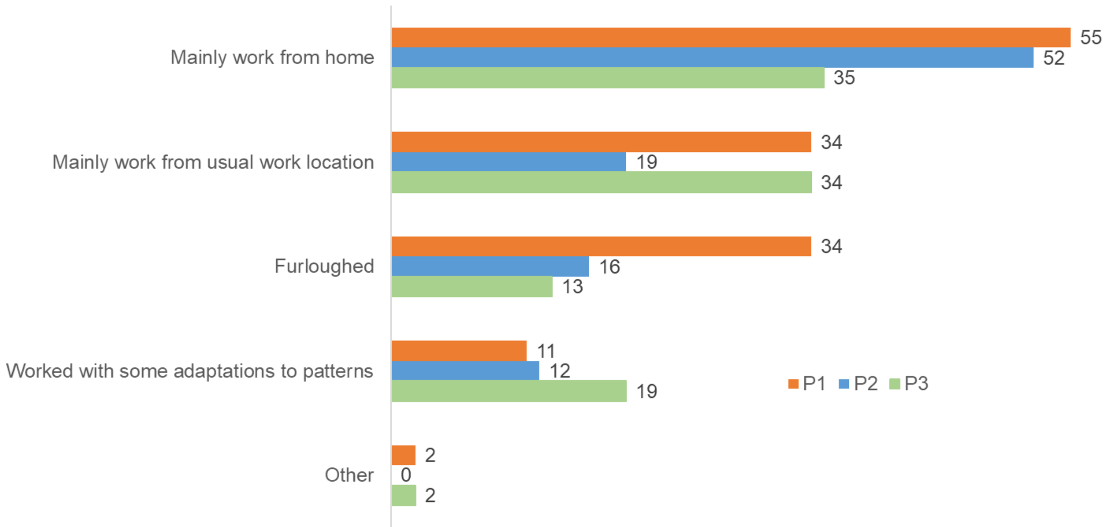
Public transport use prior, current, future



Question: How often did you travel by Bus/Rail/Metro prior to pandemic? Question how did you travel in last 7 days? Question: Over the coming weeks how you will mainly travel?. Base all 2654 respondents P3

- A major 'travel-supressing' factor has been the seismic movement towards home working. Even by September, only a third of workers were mainly working from their usual/pre-Covid-19 work location.

Change in work patterns

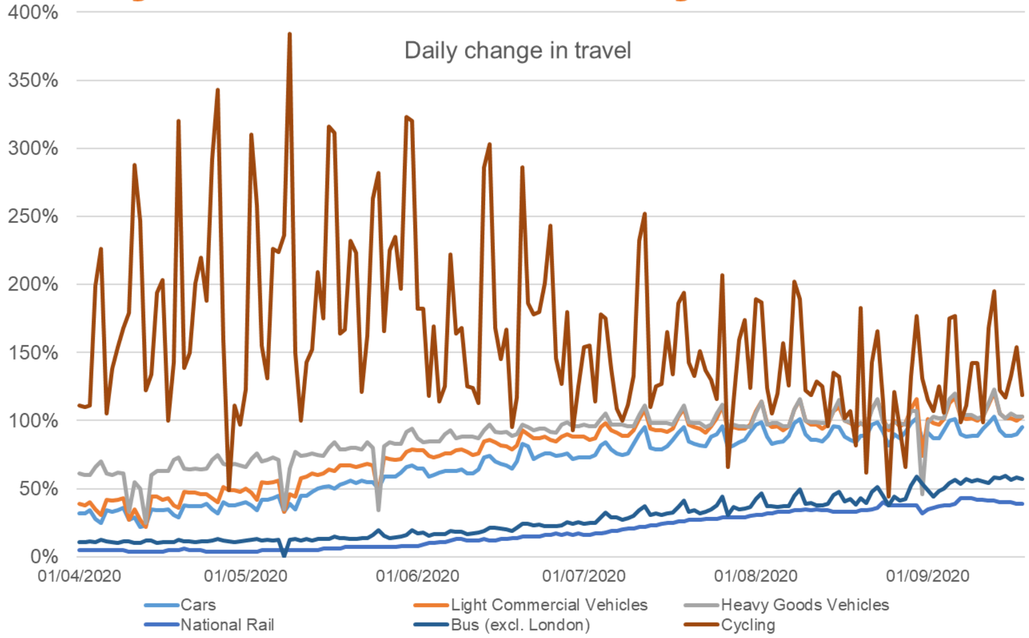


Question: Which of the following best describes your work situation since the Coronavirus (COVID-19) outbreak? Base respondents in full time/part time work

Secondly, as car use has almost recovered to pre-Covid 19 levels, there is a risk of a high carbon recovery as people retreat into their cars. This will not only risk achieving environmental goals, but will restrain economic recovery from the pandemic. If unchecked this trend could undermine the long term commercial viability of the public transport industry.

- At their lowest, car travel dropped to 32% of normal, rail to 4% and bus outside London to 10%. Car travel has grown back to approx. 90% of pre-Covid levels. Patronage on bus and rail has started to fall back mid September – with the latter seeing a much slower recovery than the former. Cycling is the only mode that has consistently recorded over 100% of pre-Covid-19 levels through the reporting period.

Daily movement data by mode.

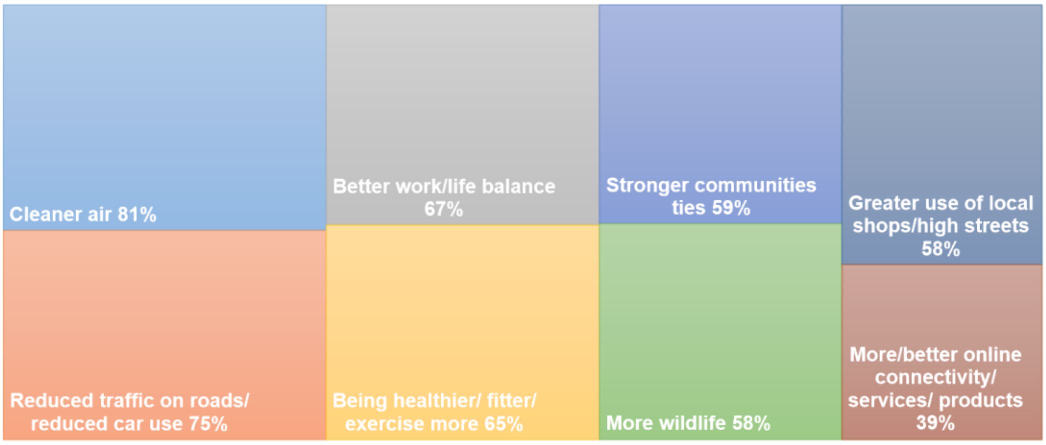


(Data is indexed to the first week of February and the comparison is to the same day of the week, i.e., 100 would mean that traffic is the same as the equivalent day in the first week of February).

Source Department for Transport https://www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic

- In May, during lockdown (P1), respondents were aspirational for the future, they want lesson to be learned and wanted cleaner air (81%) and reduced traffic (75%), they wanted a better work life balance (67%) and to be fitter/healthier (65%). Thereafter, they wanted stronger community ties (59%), more wildlife and busy local shops and high streets (both 58%).

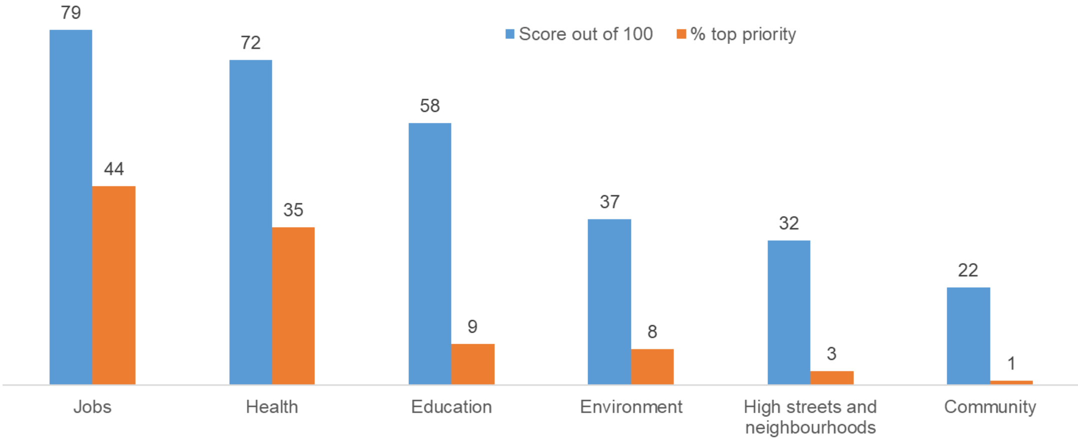
What would you like to see change as a result of the crisis?



Question: What, if anything, would you like to see change in your own life, and for the country as a whole to learn from the crisis? Base 6080

- By Summer (P2), fuelled perhaps by the increasing media attention on the economic impact of the pandemic/ changes to furlough scheme, when respondents were asked to rank priority areas for recovery post pandemic, Jobs was the top priority area (44% top priority) followed by Health (35% top priority) and Education (9% top priority). The Environment was ranked a lowly 4th.

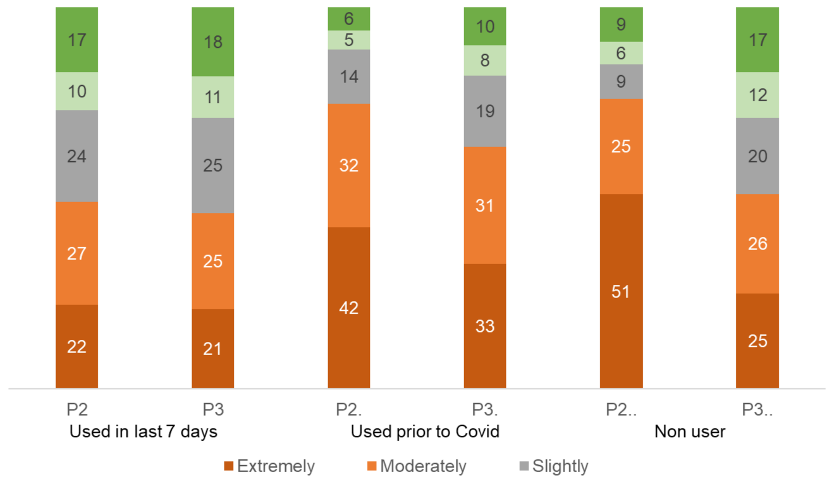
Priorities for recovery in West Midlands



Question: Which of the following do you consider to be a priority for the West Midlands recovery in the coming months? *Please drag each option into the grid on the right in order of its priority where rank 1 is the most important rank 6 the lowest. Base all respondents. A score out of 100 has been calculated for each area on the basis of 1st priority =100; 2nd priority = 80; 3rd priority=60; 4th priority =40, 5th priority =20; 6th priority=0)*

A key mitigation in stemming increased car dependence (and maintaining a commercially viable industry) is to maintain the public's confidence in the public transport network. The research illustrates how when comparing levels of concern regarding public transport use by actual use, those who *had* used public transport in the last 7 days had the lowest level of extreme concern. Positively, over the survey timeline, extreme concern levels seem to be subsiding even amongst non users.

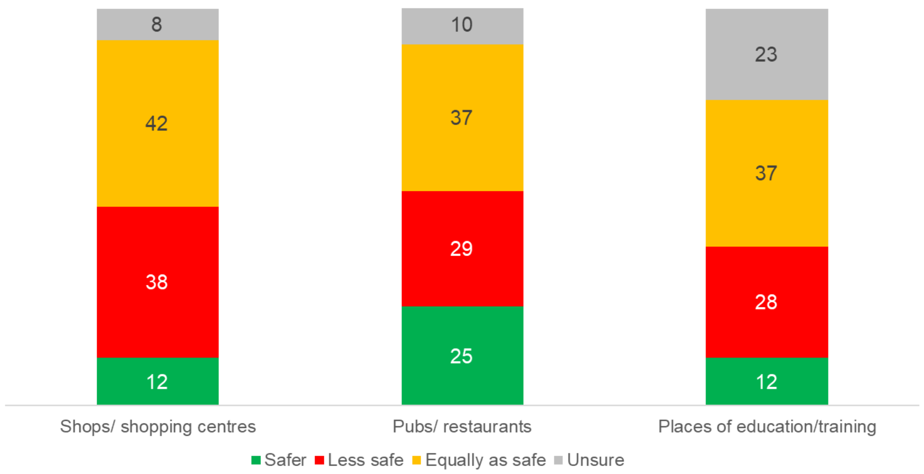
Concern about public transport use



Questions: How concerned are you about travelling by local public transport? Base all respondents

- The latest survey phase (P3) tried to place perceptions of public transport in context to other activities – such as shopping, going to schools and socialising in pubs and restaurants. Positively, around two fifths of respondents considered public transport to be equally as safe as shops, pubs/restaurants and places of education. However, a sizeable minority considered public transport to be less safe than shops (38%), pubs/restaurants (29%) or places of education (28%).

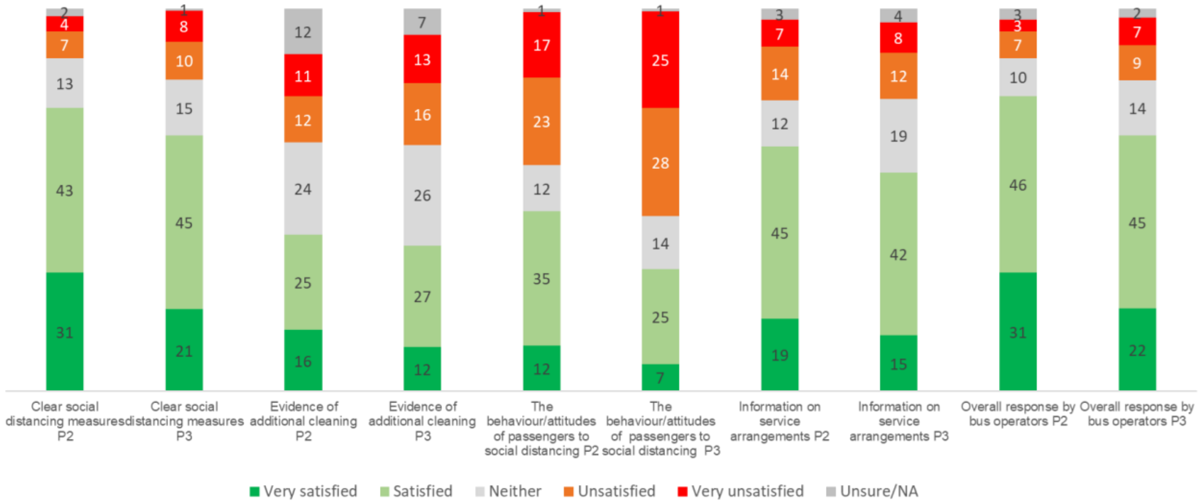
Relative safety of public transport



Question: Do you think that using public transport is more, less or equally as safe as? Base 2612 respondents

- Over late August/early September there was a general decline in satisfaction with the public transport experience in all aspects of service provision, albeit the overall response by operators remained highest rated.
- A key area of concern, paradoxically amongst respondents is the behaviour of their fellow passengers. Indeed, the biggest declines was noted with the behaviour/ attitudes of passengers to social distancing measures. This was evident across all modes, bus being the most popularly used mode, is shown below.

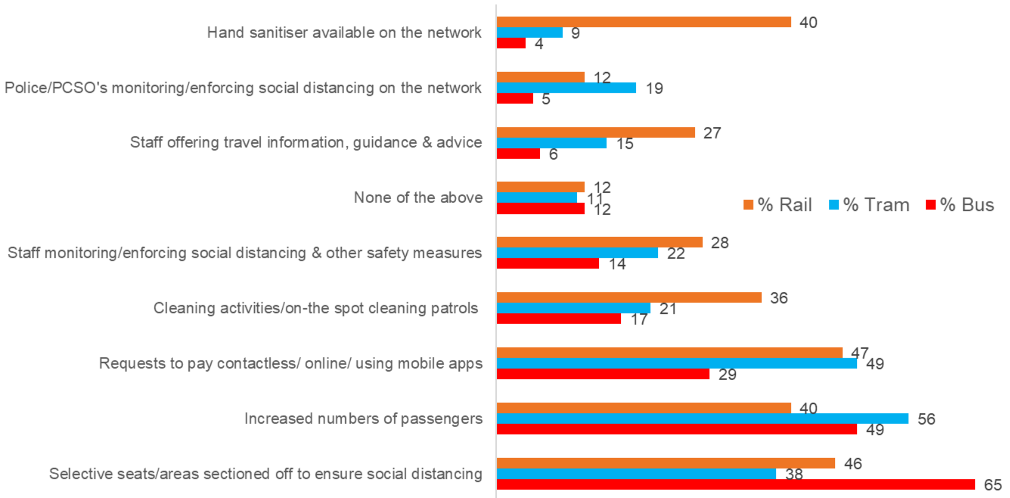
Satisfaction with bus travel



Question : Thinking about your experience of travelling by bus over the past 7 days, how satisfied or dissatisfied were you with? Base 876 respondents

- With 56% of metro, 49% of bus and 40% of rail users noting an increase in passenger numbers during late August to mid September P3, evidence of additional cleaning.
- Bus users were most aware of areas of bus being sectioned off (65%) – few were aware of cleaning activities (17%), staff-enforcement (14%) or hand sanitiser (4%) provision. This was contrasted by rail users who were most aware of requests to pay contactlessly (47%) and sectioned off areas to ensure social distancing (46%), they had high recall of the availability of hand sanitiser (40%), on-the-spot cleaning (36%), staff enforcing social distancing (28%) as well as offering advise/guidance (27%). Recall of Police/PSCO's enforcing social distancing was highest (19%) amongst tram users, as was the request for contactless payments (49%). Around one in ten of all modal users saw none of these things when travelling.

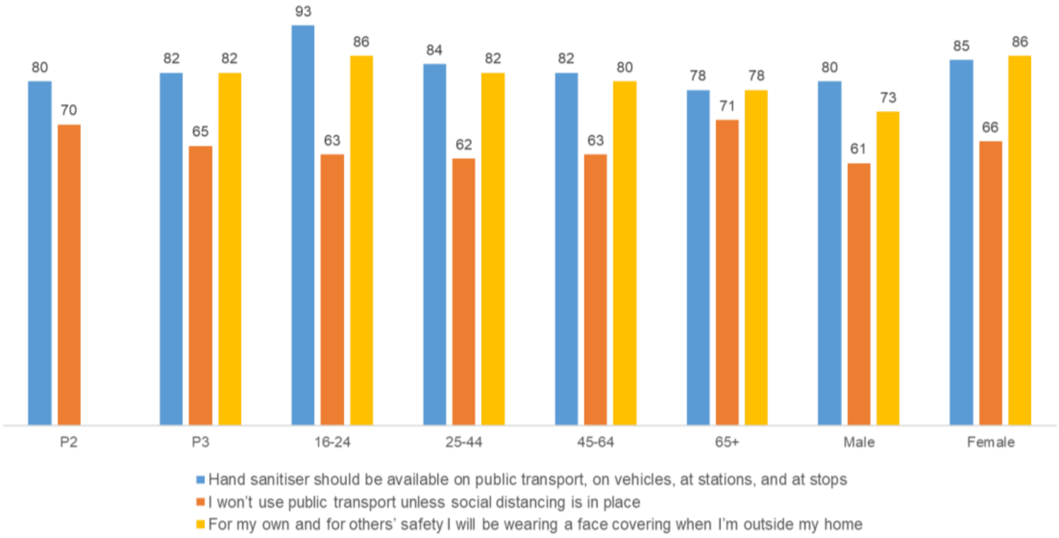
Awareness of safety measures/issues



Question: Thinking about your bus journeys in the last 7 days, which, if any, of the following have you noticed? Base 1212 public transport users

- There has been continued high level of support for the provision of hand sanitiser on the network and for taking responsibility to wear a face coverings when outside the home (82% equally). Support for all measures was highest amongst females, younger respondents and those from BAME groups, it was lowest amongst males – particularly with regards to wearing of face coverings (73%)
- Significantly, around two thirds (65%) agreed they won't use public transport without social distancing being in place.

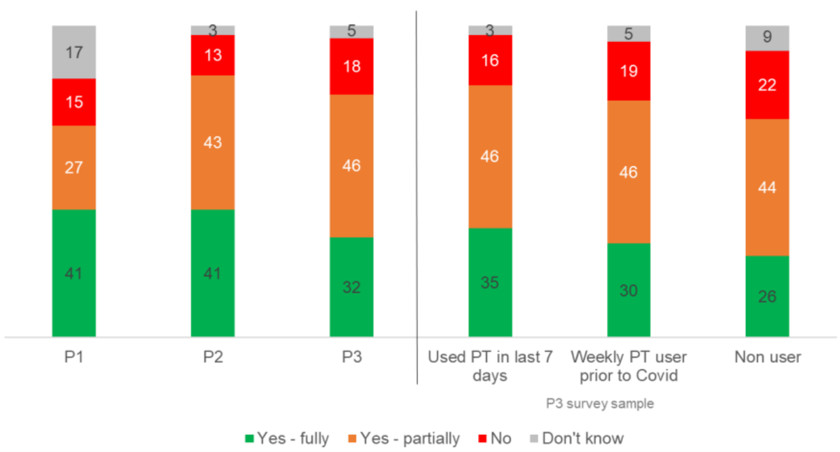
Agreement with safety measures



Question: To what extent do you agree or disagree with the following statements? Base 5953 respondents

- In addition, there is some evidence that there has been a decline in satisfaction with passenger information provision. In the latest survey wave, 35% of respondents who had used public transport in the last 7 days felt fully informed of changes to the transport network compared to 54% in P2.

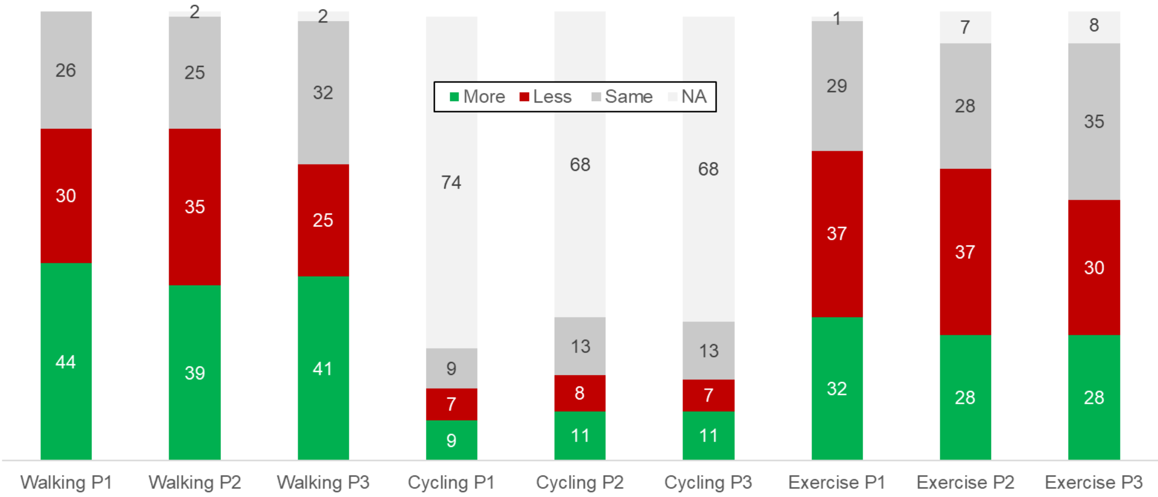
Opinion on information on changes to the transport network



Question: Do you feel you have been kept informed of changes to the transport network? Base 12122, P3 2612 respondents

- In lockdown (P1), nearly two fifths (37%) of season ticket holders had asked for a refund and a further 22% stated that their ticket had now expired. Only 15% were still using their season ticket.
- Positively, the public reacted well to most of the ticketing, payment and travel information initiatives implemented over this difficult period. Market testing in the second survey phase, showed a high interest in new ways of paying – 63% were likely to purchasing tickets via a mobile app, 59% were likely to purchase bundles of day tickets and 53% expressed interest in shorter duration season tickets.
- Overall 36% of tram users were aware of the MyMetro App and 47% felt they were likely to use the intention to travel App.
- When looking at potential use of e-scooters 28% stated they likely to do so - younger respondents aged 16-24 (50%) and 25-34 (41%), were most enthusiastic.
- Increased active travel has also been hailed as a positive trend to emerge and much attention has been placed on creating an opportunity to lock in this positive travel behaviour with the roll out of temporary and permanent measures to support walking and cycling.
- Most recently, there was a decline in the proportion of respondents who felt they were walking more (44% P1 v 41% P3) or exercising more (28% P1 v 28% P3) compared to before the pandemic.
- Consistently the numbers who thought they were exercising more continue to be outweighed by those who thought they were exercising less. However, since July, 11% thought they were cycling more.

Changes to active travel



Question : Overall, do you think you are doing more, less or about the same of the following types of exercise as you were doing before the Coronavirus (COVID-19) outbreak? Base all 12221 respondents

> Third, Covid-19 has exacerbated existing inequalities within the region, worsened by the significant disruption to public transport. It will be vital to develop the appropriate policies for ensuring that impacted groups are supported in the Covid-19 recovery period, and that transport interventions continue to focus on supporting the inclusive growth agenda.

- The pandemic has touched everyone's lives - respondents were most likely to feel they missed seeing friends/family (75%). Two in five (39%) had often felt lonely, over a third (35%) had experienced poor metal health and 30% a negative impact on their finances.

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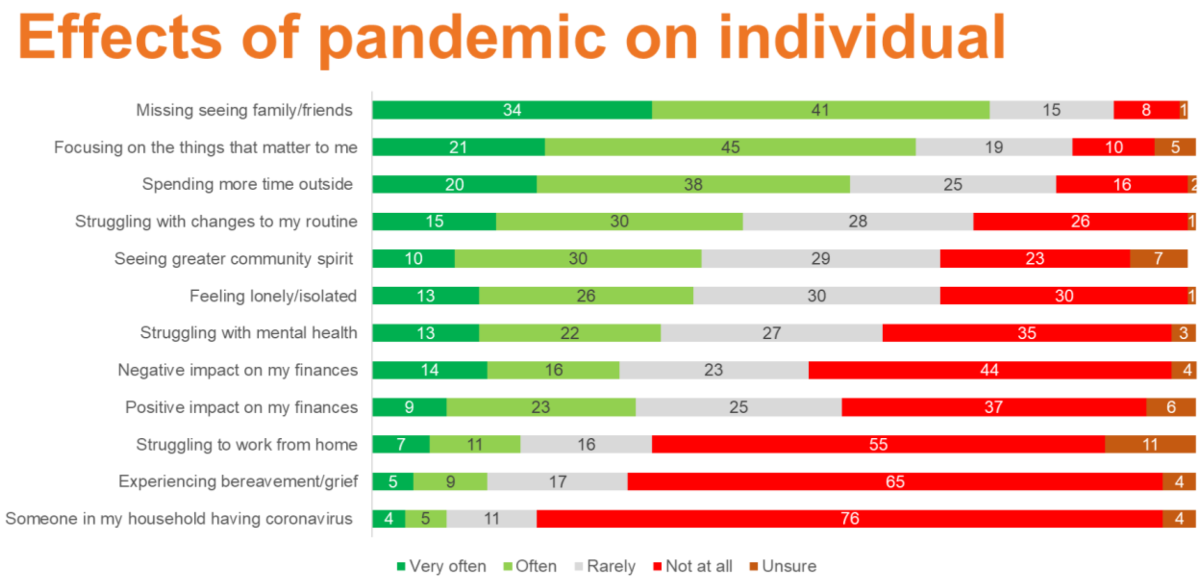
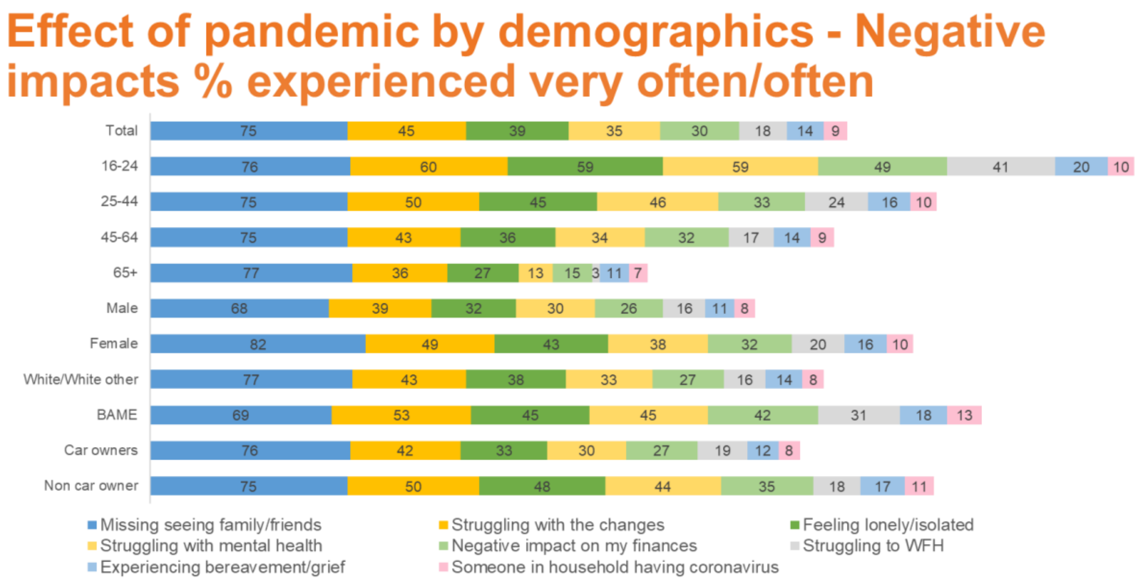
- There have been some positively with two thirds (66%) focusing on the things that matter to them, over half (58%) spending more time outside and two fifths (40%) feeling a greater community spirit.



Question: Since the Coronavirus (COVID-19) pandemic, how often, if at all, you have experienced each of the following? Base P3 all 2654 respondents

- In this analysis, younger respondents were more likely to state they felt the negative effects of the pandemic. This was particularly the case for feeling lonely/isolated (59%), struggling with changes (60%), struggling with metal health (59%) or feeling a negative impact on finances (49%).



Question: Since the Coronavirus (COVID-19) pandemic, how often, if at all, you have experienced each of the following? % experienced very often/often Base all P3 2654 respondents

- Yet young people 16-14 year olds have shown some amazing resilience during these times. Young people were the group most likely to be more active as a 'result' of the pandemic:-

51% were walking more (v 41% other age groups)

20% were cycling more (v 11% other age groups). This figure rose to 24% amongst male 16-24 year olds.

36% were exercising more (v 28% other age groups)

33% thought they would cycle more as things got back to normal (v 27% other ages). This figure rose to 37% amongst female respondents.

- Post lockdown, 16-24 year olds were the age group most likely to have returned to public transport use - particularly the bus.
- Higher levels of public transport use amongst young people was partly driven by the lower levels of driving licence holding/ car ownership – but their desires to learn to drive and/or buy a car are high.

Post lockdown, 16-24 year olds were most likely to have returned to public transport use (58% v 41%), particularly the bus (51% v 37%).

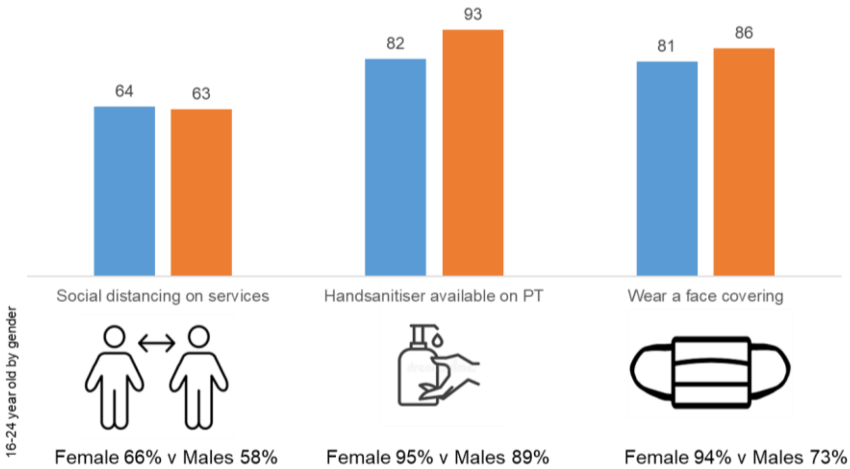
They were most likely to return to using public transport in the future. Only 14% would not consider future use (38% other age groups).

Higher levels of public transport was partly driven by the lower levels of driving licence ownership (23% v 58%).

However nearly half are considering learning to drive (47%) and a fifth are considering buying a car in next 6 months (19%).

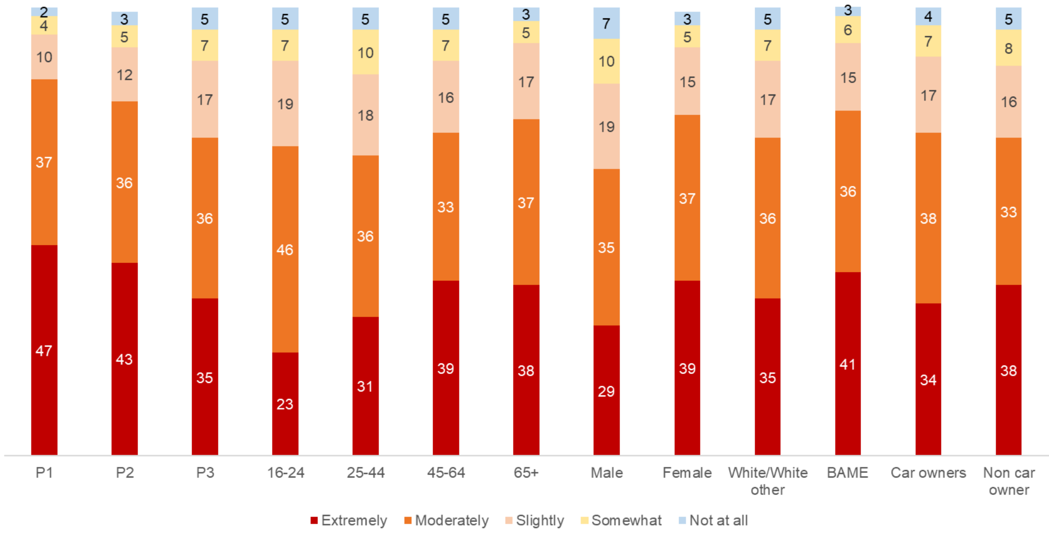
- Despite young people often being 'demonised' by the media as flouting social distancing rules and thereby spreading Coronavirus, compliance with all the guidelines is high amongst young people, perhaps with the except of wearing face covering amongst young males (73% v 81% overall).

Agreement with Covid safety measures (%)



- Levels of extreme concern about using public transport are highest amongst those aged 65+ (38%) and those from BAME backgrounds (41%).

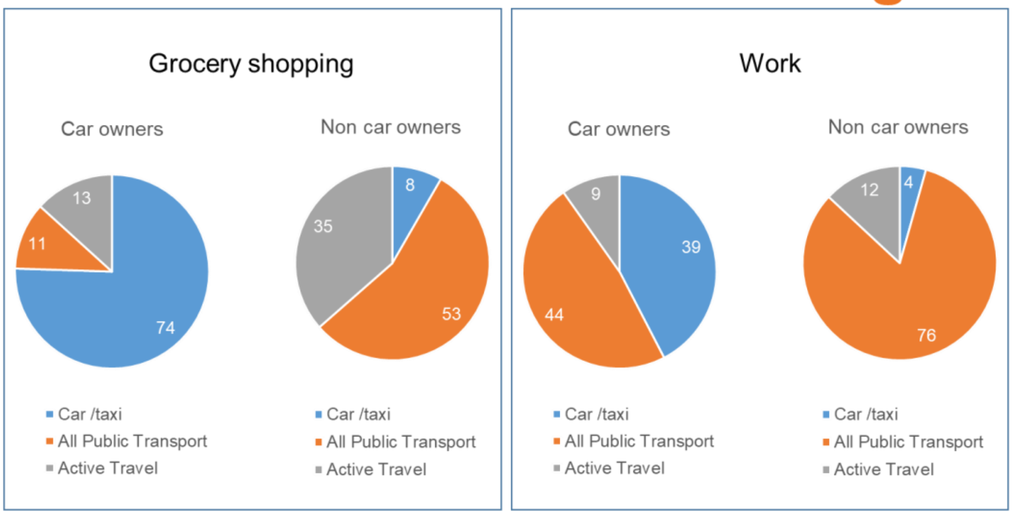
Level of Covid-19 Concern



Question: How concerned are you about Coronavirus (COVID-19)? Base 12122 respondents

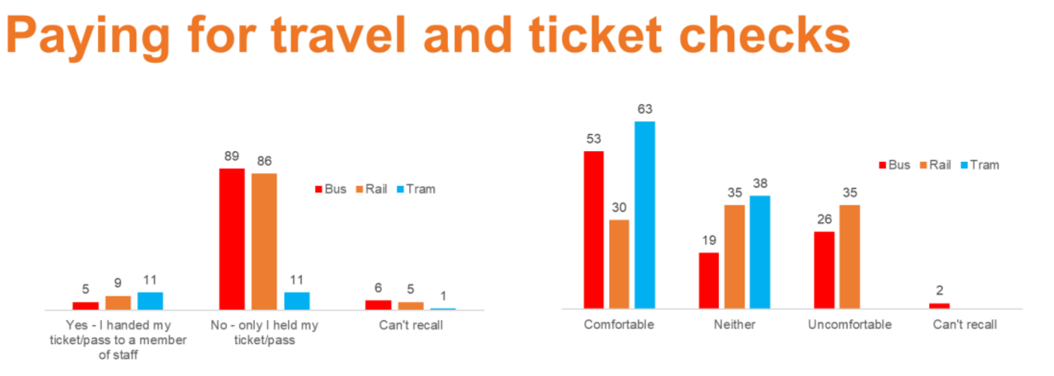
- For some, using public transport will be the only viable travel option even for essential trips such as work and shopping as the data from P3 shows.

Mode of travel over the coming weeks



Question: Over the coming weeks how you will mainly travel when making the following types of journeys in the West Midlands: Base all 2654 respondents.

- Maintaining passenger safety remains paramount whilst making services accessible to all. In P2 discussion focussed on removing cashless payments, - a move which for 21% (rising to 36% of non car owners) would have a big/moderate impact. In P3, we discovered that the majority of passengers did not need to hand over their ticket when it was checked and those that did so were comfortable in doing so.



Question: Did you hand your ticket or pass over to any member of staff to have it checked? Base 1213 public transport users

Question: How did this make you feel? Base 78 users who handed over ticket

Our Forward Research Plan

- The Coronavirus Covid-19 pandemic has culminated in the need for TfWM to revise its public engagement approach. Face to face, paper-based, self-completion, interceptor survey which have been suspended since March 2020 would be less effective due to suppressed travel demand /poorer 'hit rate' in. Online, such as that reported here, and telephone surveys have become increasingly important – but rely on having to recruit new respondents each time.
- HIT, in conjunction with Mustard Research, develop a Market Research Online Community (M.Roc) that will allow visual, interactive, and flexible interactive engagement with residents across the West Midlands. The Community will have a diverse audience (it can be aimed at niche or non user groups) and respondents can complete activities in own time in a safe and secure and environment.