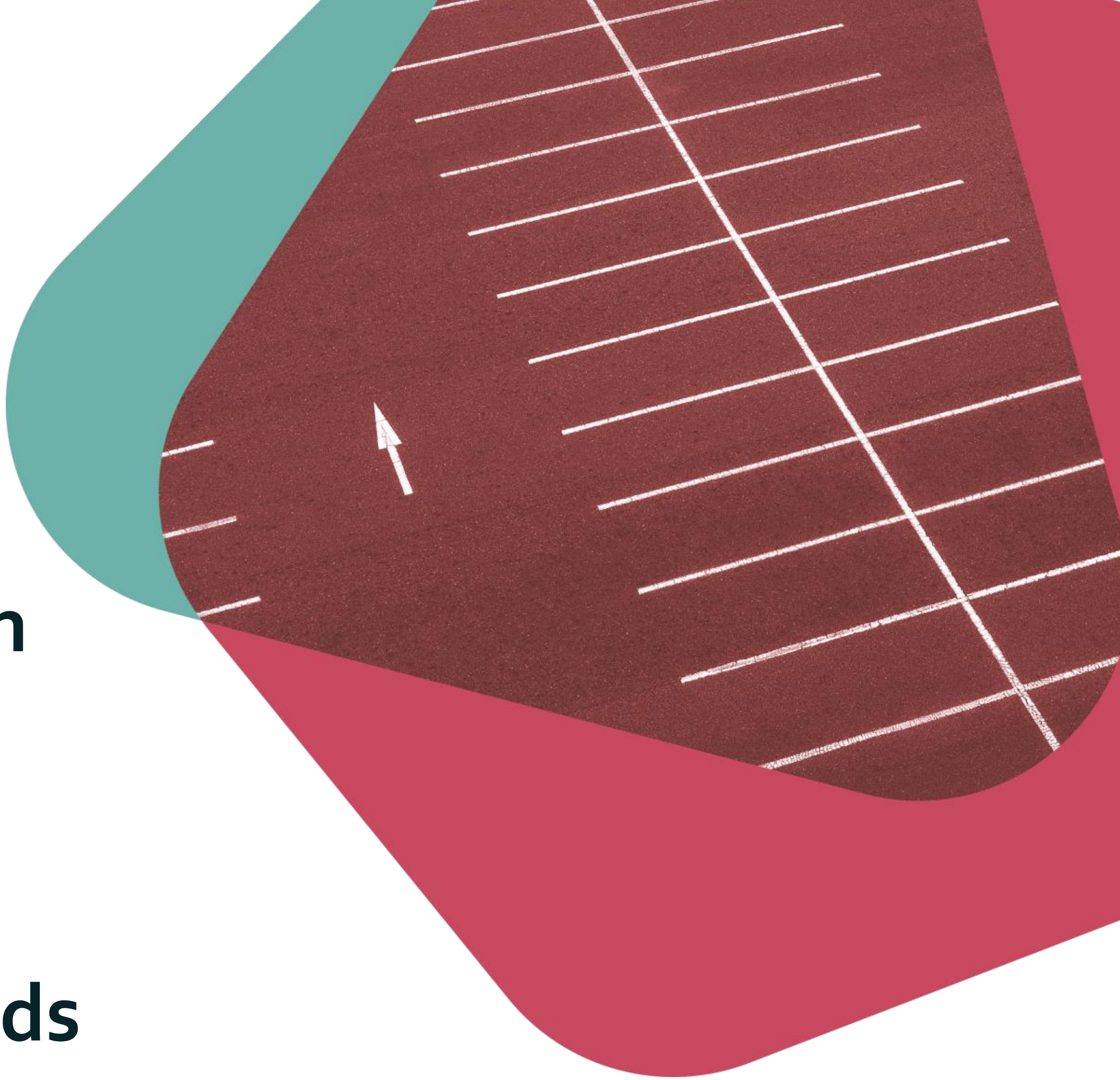
CENTRE FOR RESEARCH INTO ENERGY DEMAND SOLUTIONS



# UK Transport and Travel Adaptation Study (TRANSAS)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## Institute for Transport Studies, Leeds


7th June 2022

International Transport Forum Roundtable “Shaping Post-Covid Mobility in Cities

July 2020
**Wave 1**
Online Survey
10 city-regions in England/Scotland
N= 9362

Dec 2020
**Wave 2**
Online Survey
10 city-regions in England/Scotland
N=6209

July 2021
**Wave 3**
Online Survey
10 city-regions in England/Scotland
N=4808
+ top up
n = 2070

June 2021
**Wave 4**
Online Survey
10 city-regions in England/Scotland
N=~4600
+ top up
n = ~2400

Nov 2022
**Wave 5**
Online Survey
10 city-regions in England/Scotland
N=~4140
+ top up
n = ~2060

July 2020
**Wave 1**
Public Interviews
5 city-regions
N=107

Feb/March 2021
**Wave 2**
Public Interviews
5 city-regions
N=101

July 2020
**Wave 1**
Policy Interviews
N = 18

Dec 2020
**Wave 2**
Policy Interviews
N = 18

June/July 2021
**Wave 3**
Policy Interviews
N = 18

October 2021
**Wave 4**
Policy Interviews
N = 18

June 2021
Business Interviews
N = 14

## Online Survey Locations

**Scotland** – Aberdeen & Aberdeenshire, Edinburgh, Glasgow, Ayrshire

**England** – Bristol, Lancashire, Liverpool, London, Manchester, Newcastle

# TRANSAS – Methodology

# *Presentation Outline*

1. *WHAT* has changed?
2. *WHO* and *WHERE* have changed?
3. What does this mean for the future blend of modes and activities?


March 2021 | Sept 2021 | March 2022

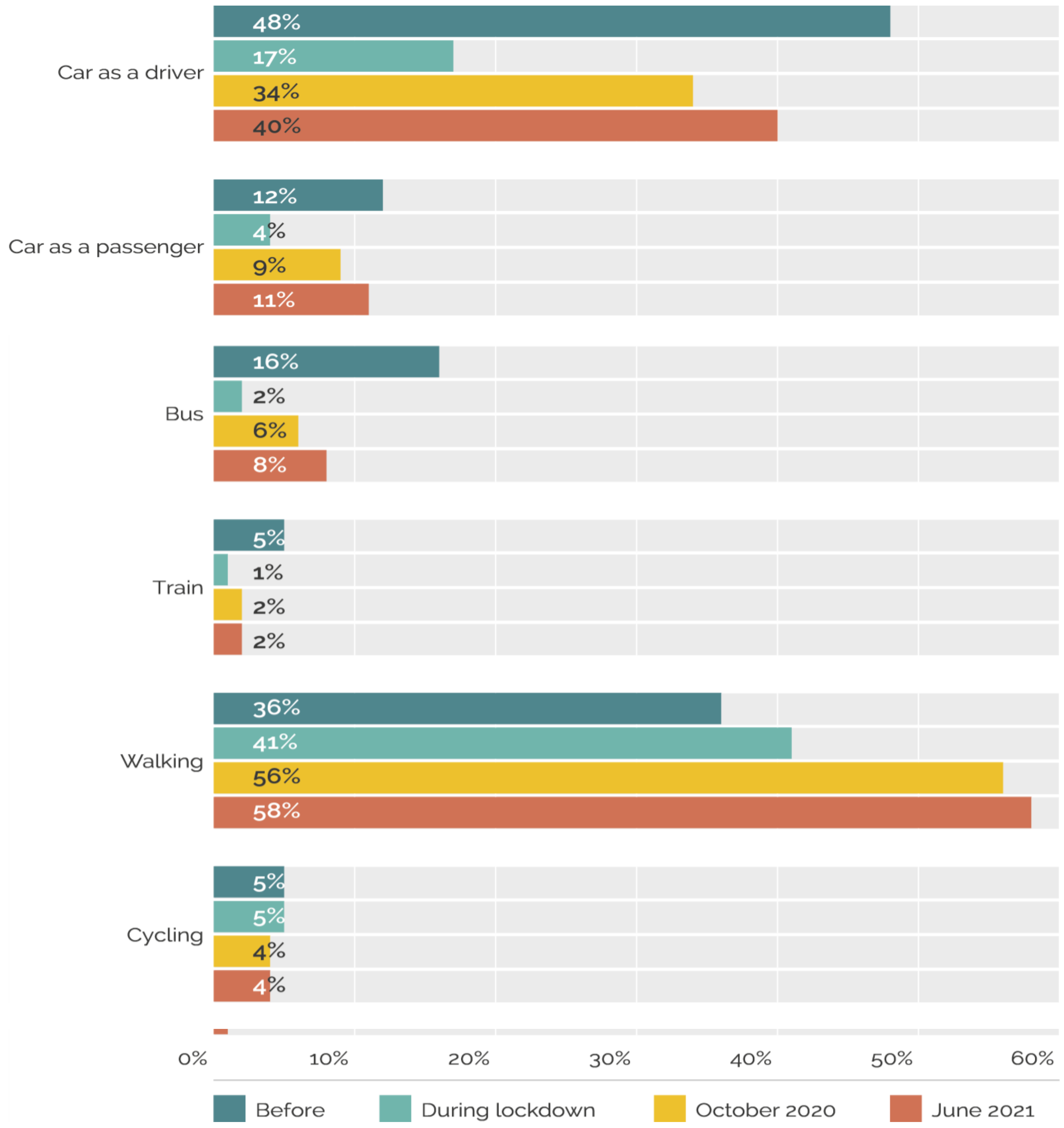
https://covid19transas.org/

TRANSAS – Key reports to-date

*1. WHAT* has changed?

- Absolute and relative usage of different modes
- Destinations, frequencies, timings of journeys
- Balance of time spent on activities
- Car ownership levels
- Choice and aspiration of where to live
- Attitudes to travel and travel modes

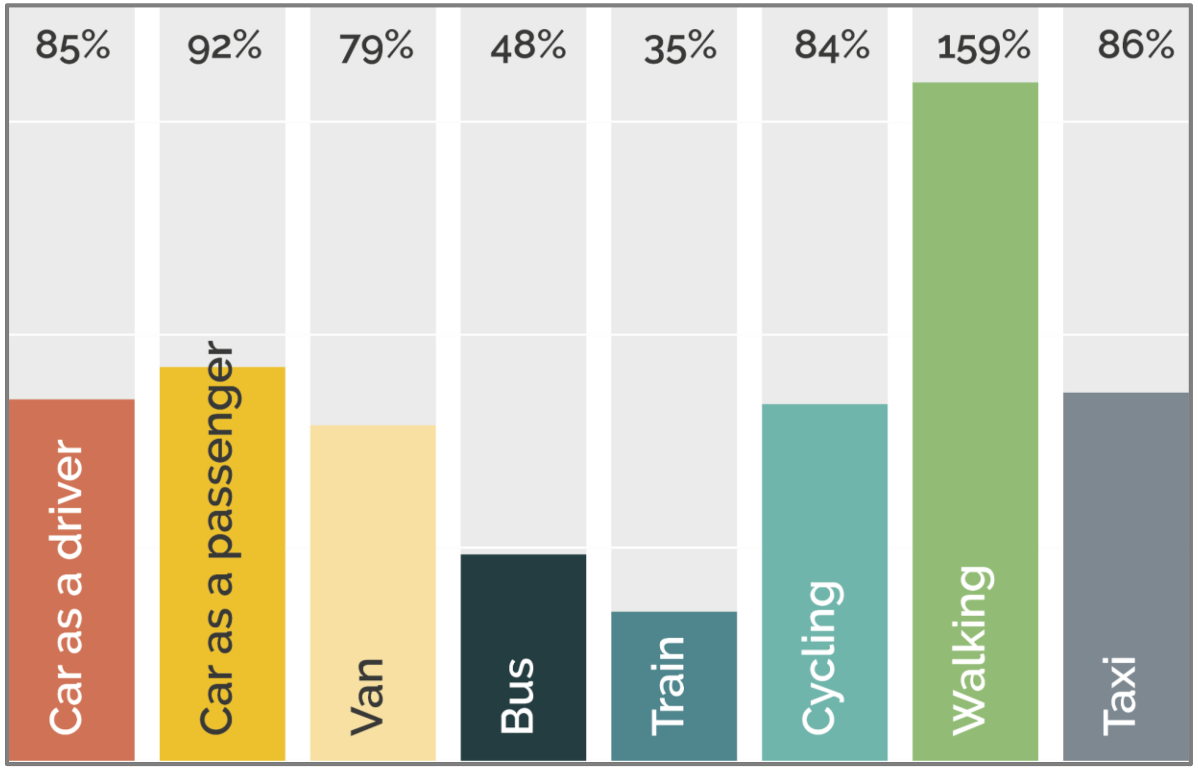
# *Mode use at least 3 days a week (W1-W4)*




**Weighted. Before N=9362; during lockdown N=9362; October 2020 N=6209; June 2021 N=6878**

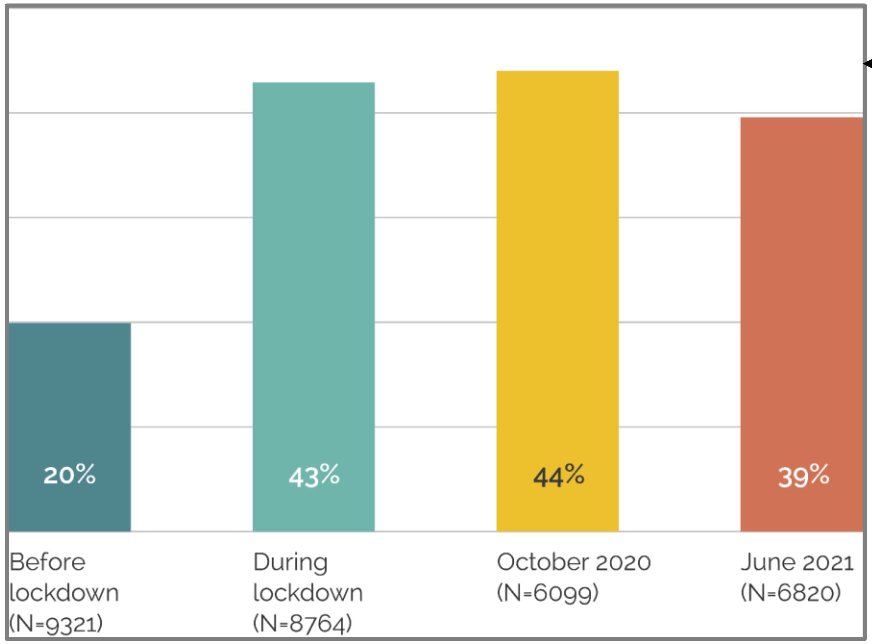
# *All modes - except for walking - are used less frequently than pre-pandemic levels*

**Weighted. Before N=9362; June 2021 N=6878.**



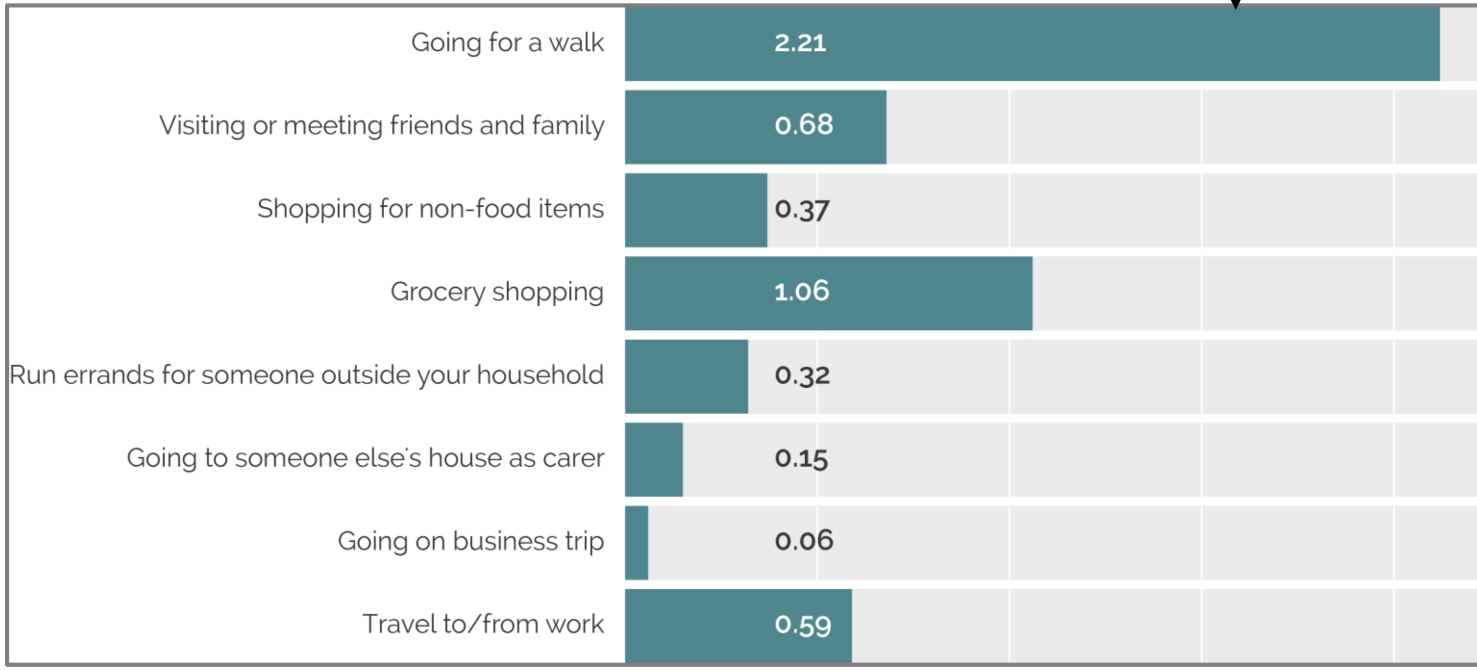

Mode use at least three days a week in June 2021 as a proportion of pre-Covid levels (N=6,878)

*Walking levels are higher for more than just leisure, and they have stayed up*

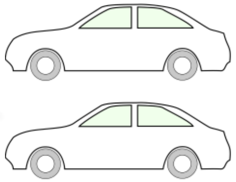



Average % journeys involving walking (N=4,808)

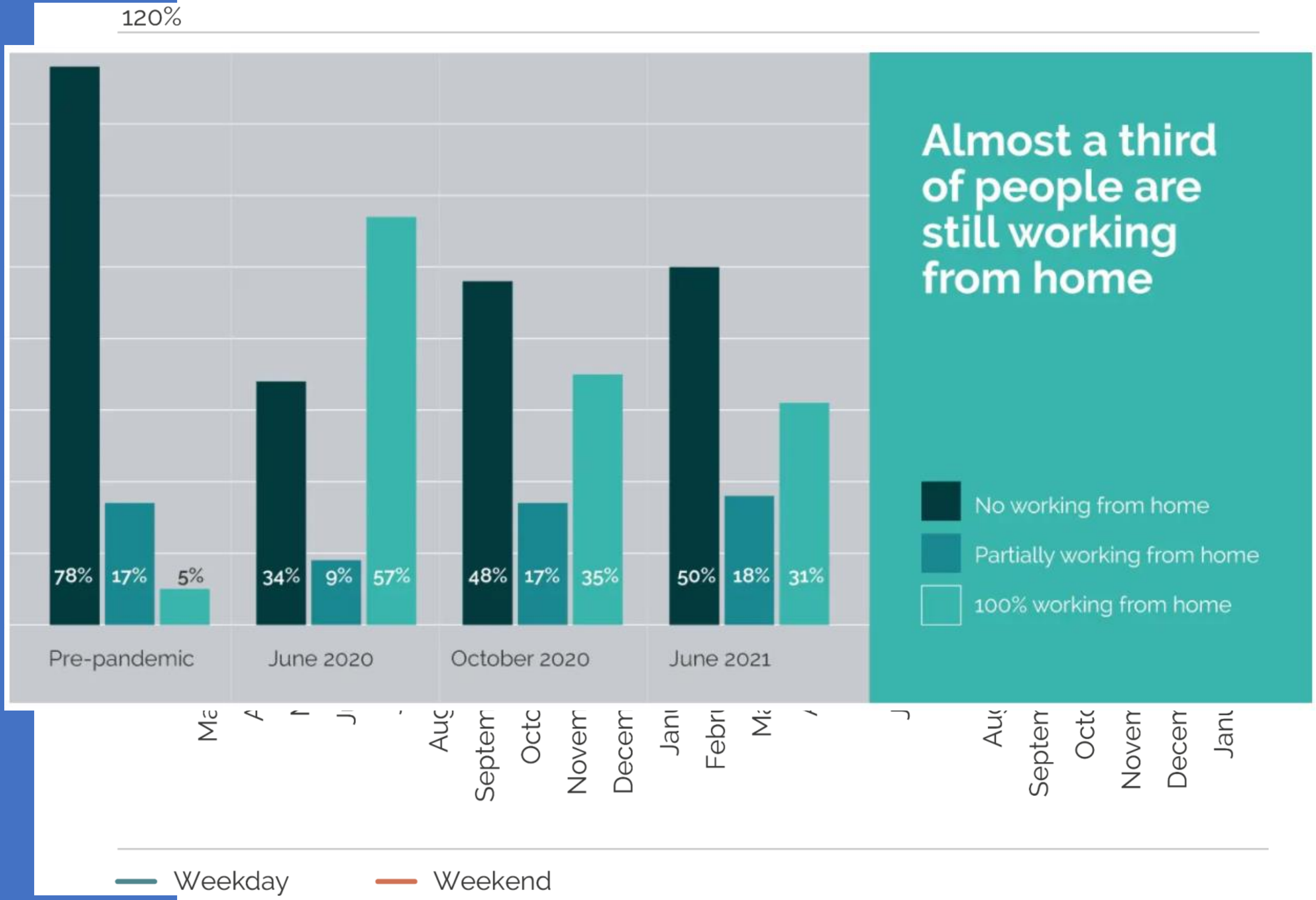
Mean days per week for each journey purpose in June '21 (N=6,878)



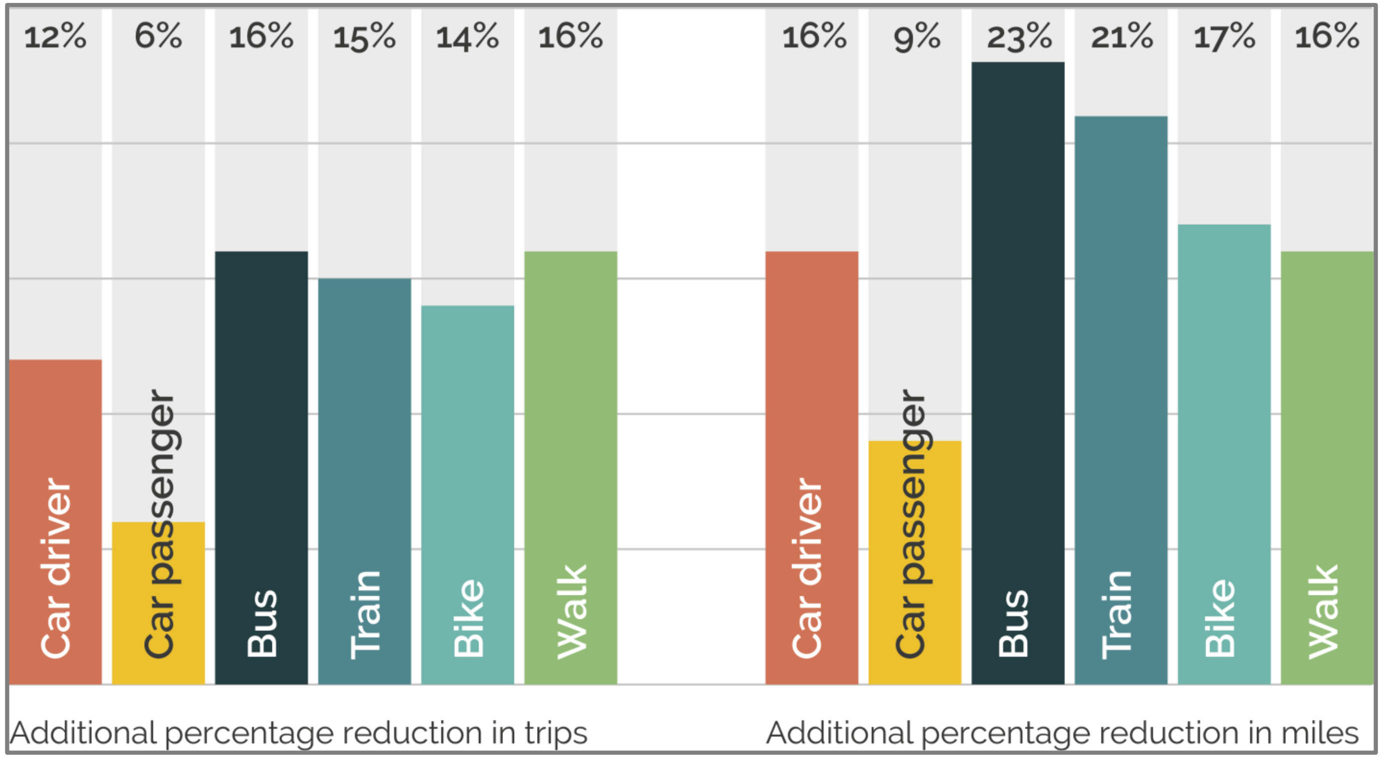
# Where are people spending their time?



# *Working from home (WFH) continues to be a key factor*



# *With 50% of June 2021's levels of WFH, car commuting will fall by ~16%*




% reduction in commute trips and miles saved per mode over and above pre-Covid levels if 50% of June '21's levels were maintained
(N=6,878)

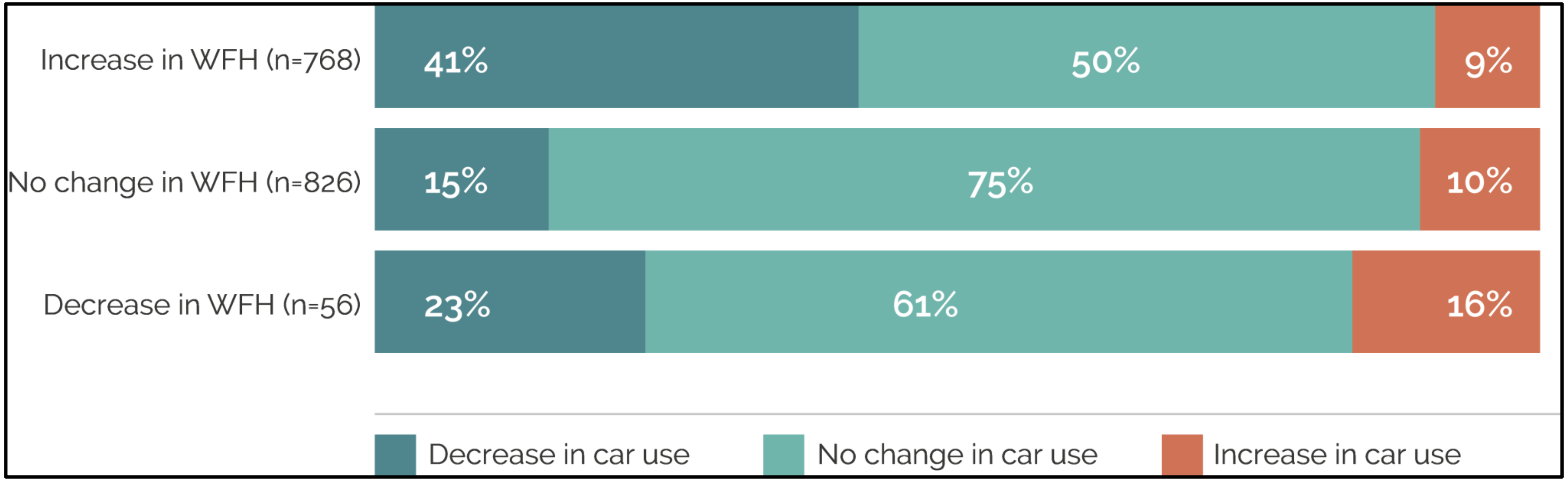
Plus our data shows that WFH leads to reductions in the use of the car for other journey purposes. (see next slide)

# *Those who increased their WFH also reduced their car use the most (for all purposes)*

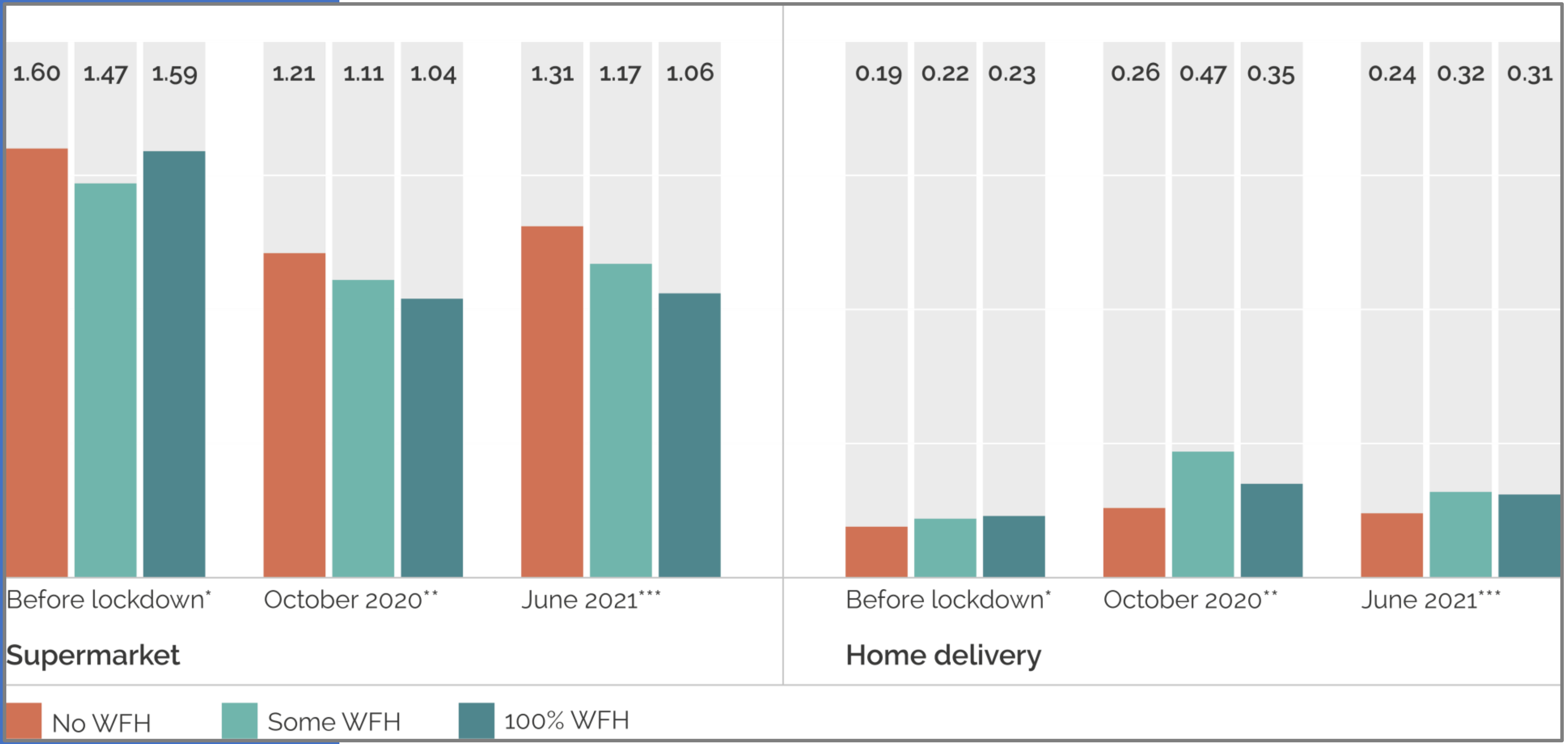
**Ave. days per week driven vs. amount worked from home. June 2021 (N=3495, W3 weighted, P ≤0.001)**

| | No WFH | Some WFH | 100% WFH |
|---|---|---|---|
| Ave days per week on which a car is driven | 2.83 | 2.47 | 165 |

**Proportion of people in each working from home change segment split by change in car use, for the time period pre-Covid-19 (February/early March 2020) to June 2021 (N=1650 P ≤0.001)**

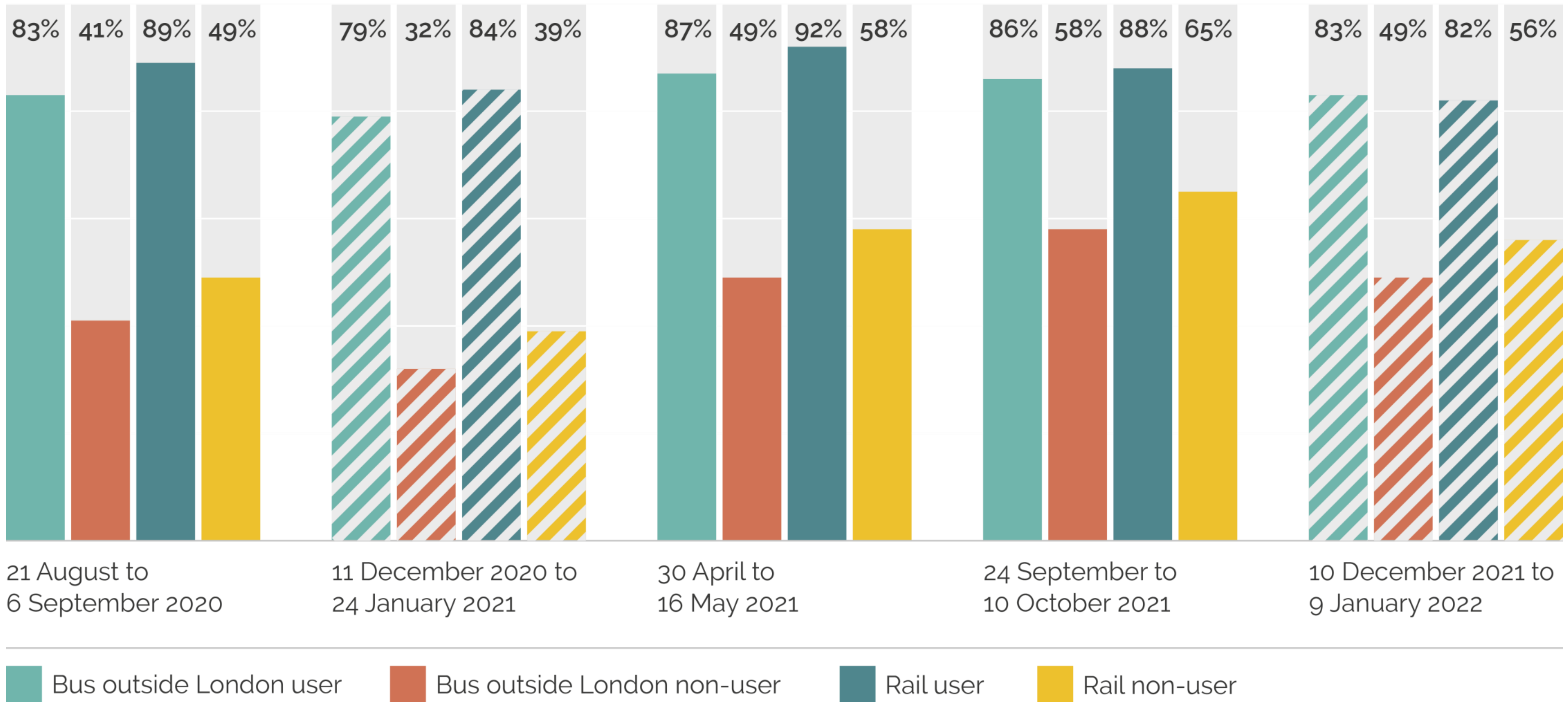


# The same retail spend has been achieved with less physical mobility

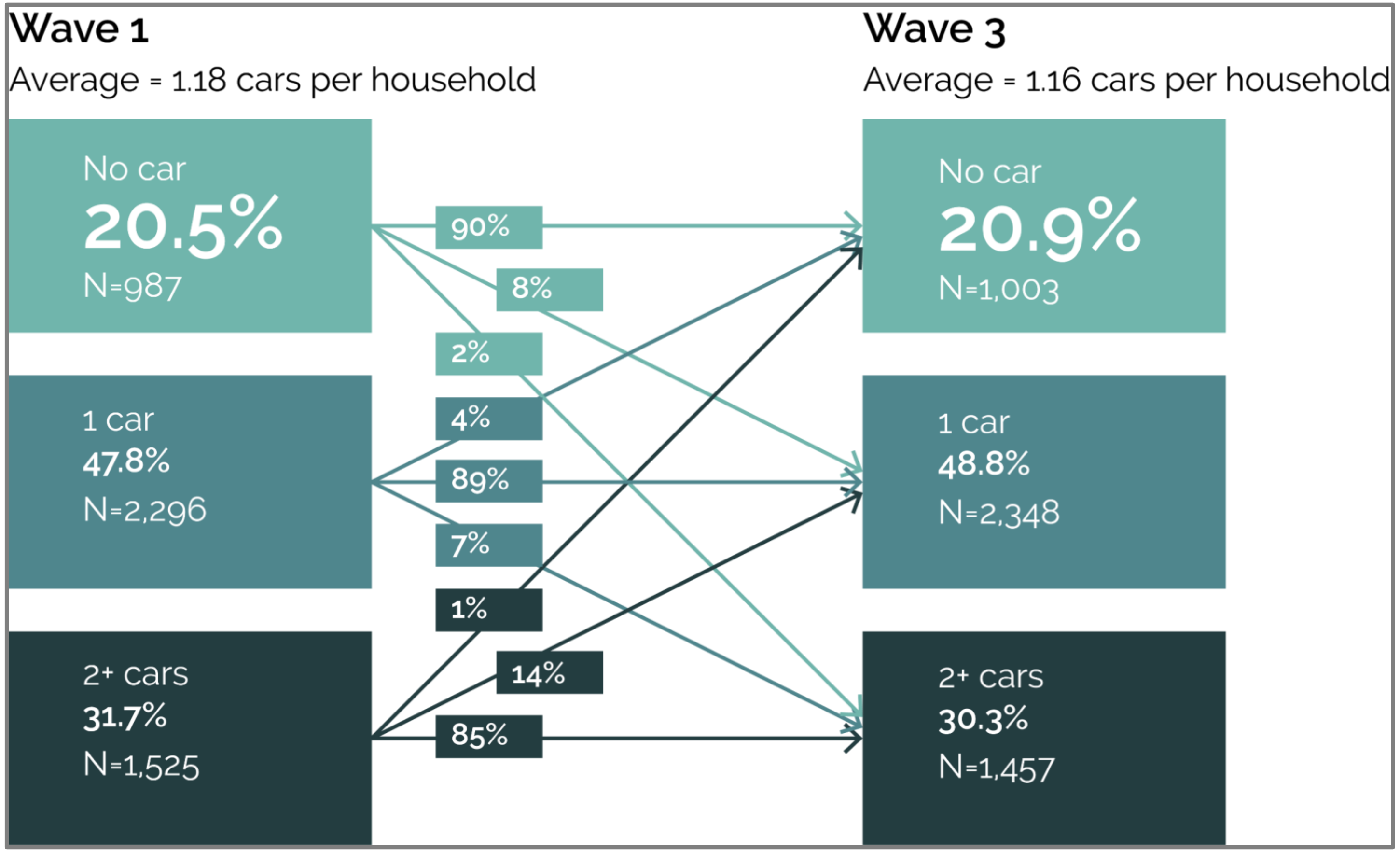



**Average (mean) days per week visiting supermarket or receiving a home grocery delivery at each time point split by level of WFH at that timepoint. Before lockdown N=2406; October 2020 N=2052; June 2021 N=2112. * not significant; **p <0.01; ***p<0.001**

# The implications for public transport will be significant



# *Average car ownership has fallen*




Changing patterns of household car ownership June '20 – July '21
(N=4,808)

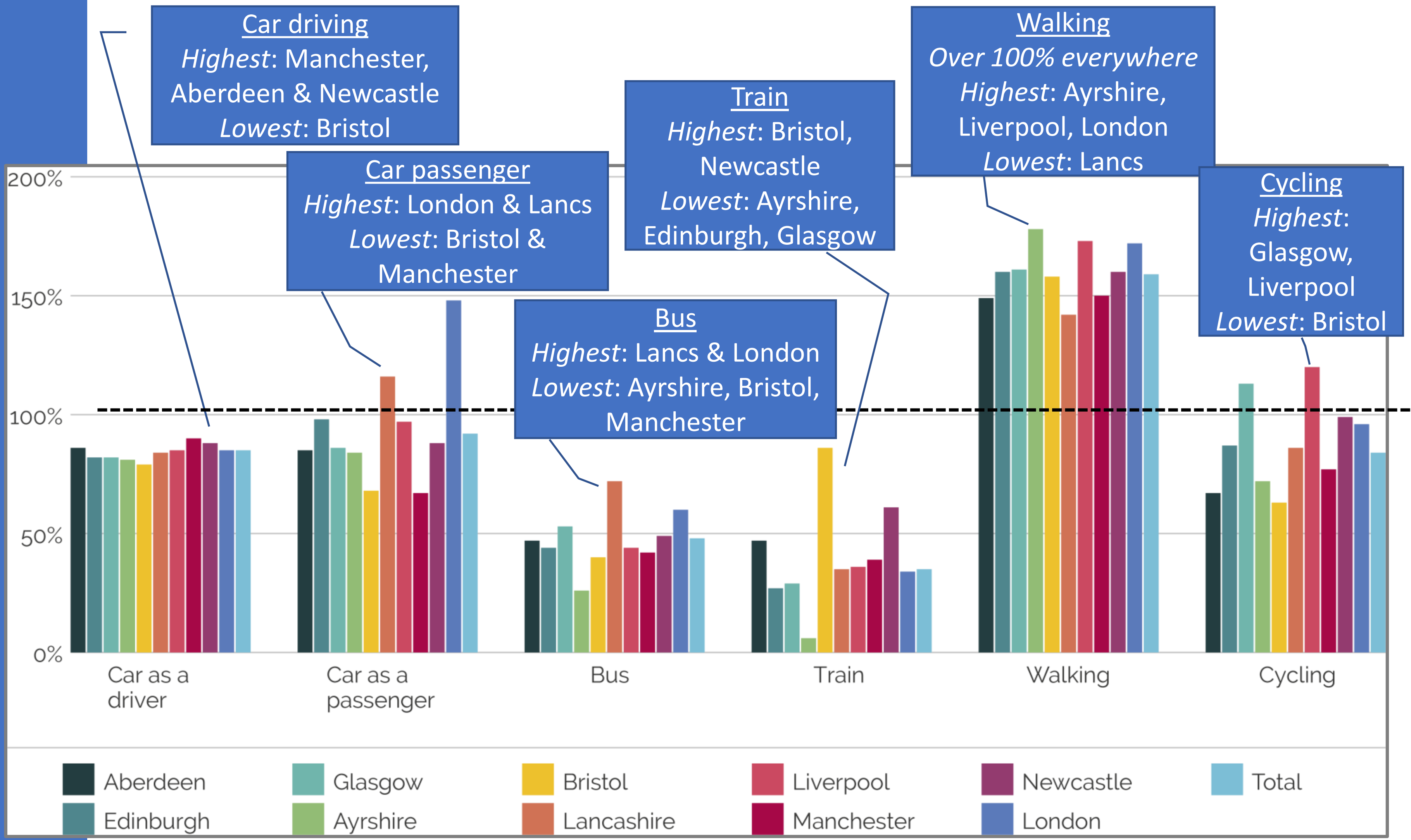
# *WHO & WHERE* has changed?

- Different responses in different places according to: demographics; labour market, public transport infrastructure; social norms
- Differences across demographic segments
- Differences according to individual health risk but not local pandemic restrictions
- Inequalities in ability/ capacity to change and adapt
- **Therefore policy responses will need to be different from place to place and investments need to be tailored to population segments**

# 10 locations - sample sizes

| | W1 | W2 | W3 |
|---|---|---|---|
| Aberdeen | 968 | 622 | 688 |
| Edinburgh | 973 | 655 | 711 |
| Glasgow | 982 | 665 | 697 |
| Ayrshire | 659 | 492 | 506 |
| Bristol | 966 | 604 | 664 |
| Lancashire | 960 | 647 | 722 |
| Liverpool | 968 | 659 | 730 |
| Manchester | 959 | 624 | 759 |
| Newcastle | 977 | 656 | 733 |
| London | 950 | 585 | 668 |
| ***Total*** | ***9362*** | ***6209*** | ***6878*** |
| ***Scotland*** | ***3582*** | ***2434*** | ***2602*** |
| ***England*** | ***5780*** | ***3775*** | ***4276*** |

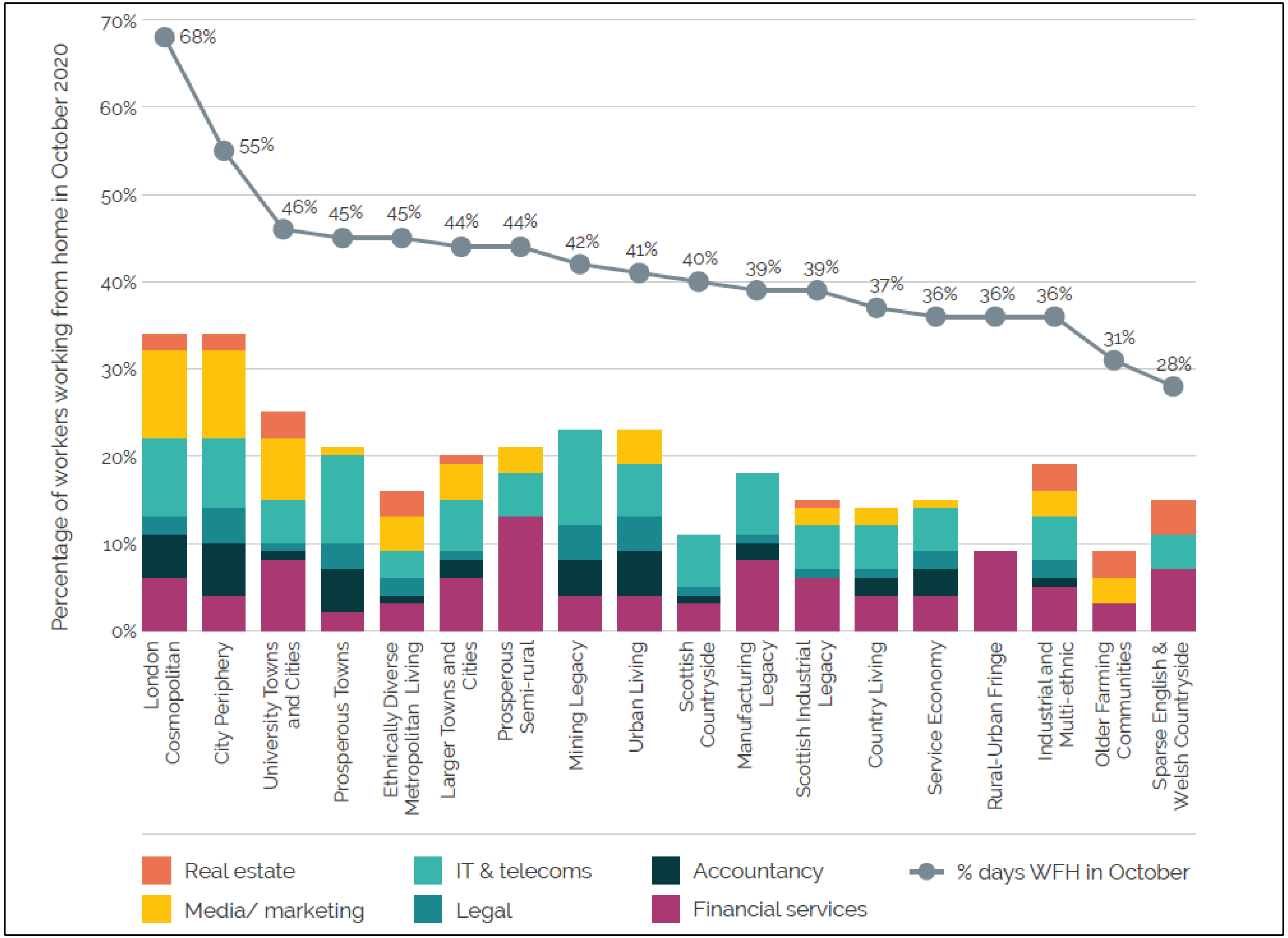
*Car traffic is not back to pre-pandemic levels - anywhere*




**Mode use at least three days a week in June 2021 as a proportion of pre-Covid levels (N=6,878)**

*Levels of WFH between locations were uneven before + during Covid*

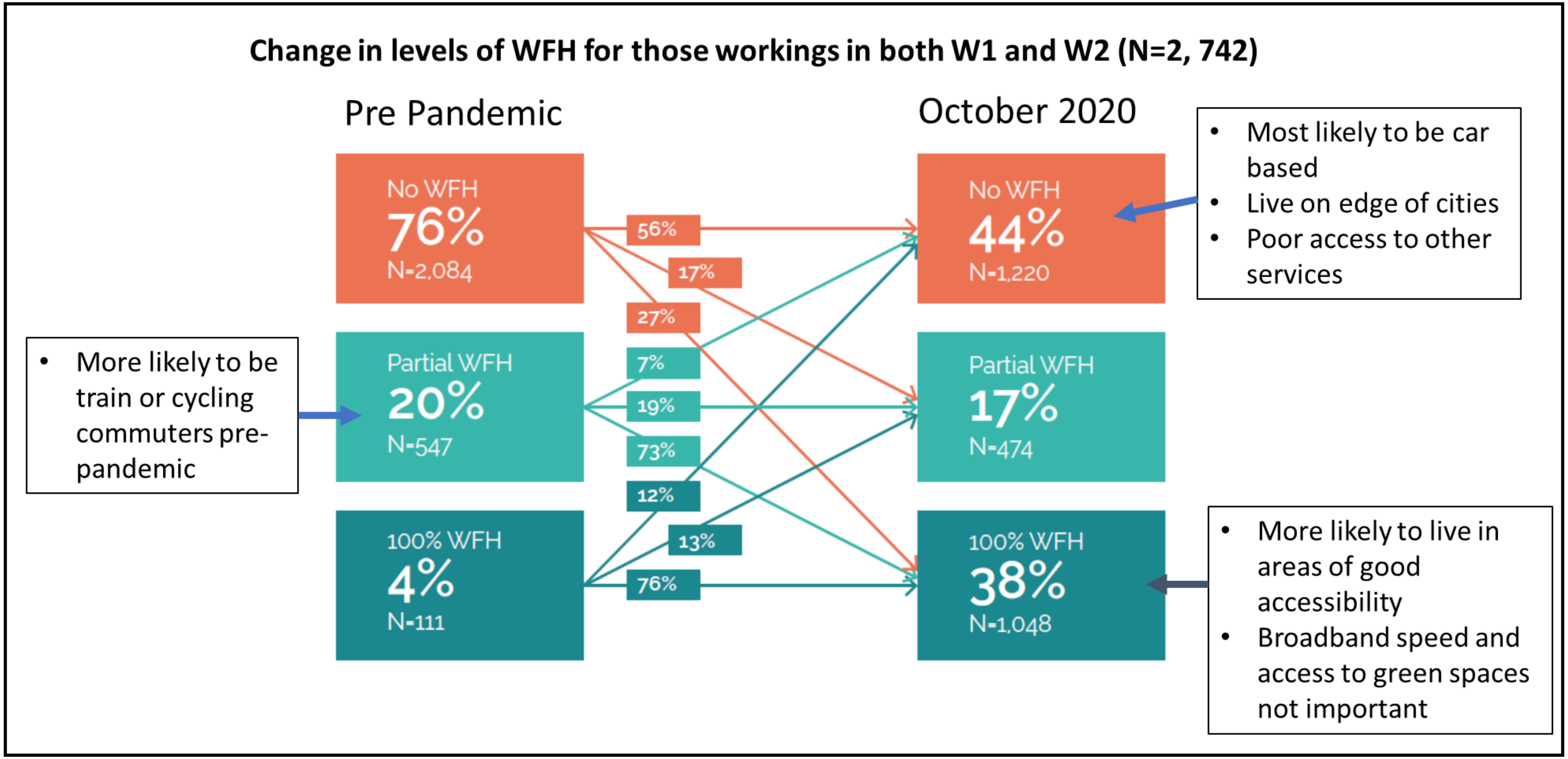
*Rates of workplace return have also been variable*




**Percentage of workers in each of the top six job sectors responsible for the most working from home in each Local Authority Subgroup. N=3,236**

# WFH increased among the least car dependent commuters and those already living in areas with accessible local services

>> The impact on car




n

>> Travel poverty could be exacerbated by

**Large differences among demographic characteristics including health risk:**

- ❖Shielding households were twice as likely to start online grocery shopping
- ❖Ethnic minorities were most likely to continue using buses
- ❖Males were still more likely to cycle than females
- ❖Walking became something that everyone did

# Concluding thoughts: What will the future blend be?

- The pandemic cannot be ‘unlearnt’ – avoid false dichotomies
- New working arrangements being established
  - Where people are based
  - What the yearly, monthly, weekly pattern is
  - What the flexibility of start and finish times is
- This is part of the employer-employee package
- Business travel is also part of these shifts
- People have also adapted – e.g. childcare routines, space in houses, boomerang children, pets, caring responsibilities
- Retail companies have adapted even further their on-line offer
- Service providers have developed new on-line markets

# Acknowledgements


- **The wider project team –** Dr Llinos Brown and Professor Iain Docherty
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- Strathclyde Partnership for Transport
- Liverpool City Region Combined Authority
- Transport for the North
- Department for Transport