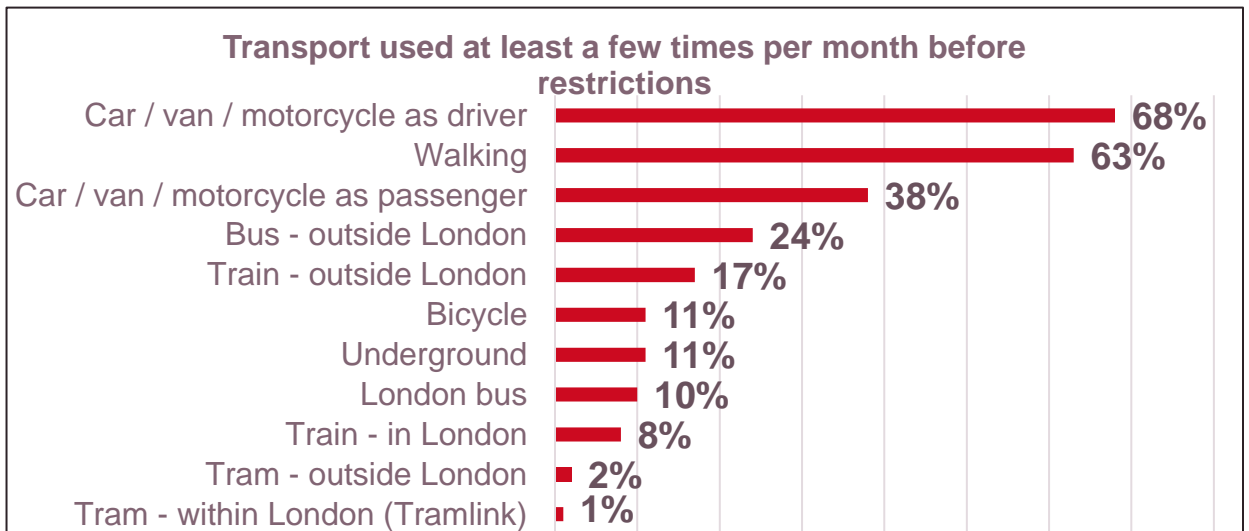


Travel during Covid-19: omnibus week 1

Travel patterns before outbreak

Before the outbreak 43% nationally used any public transport at least a few times per month and 80% used a car



Under 25's and those in London had highest use of public transport before Covid 19

| | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |
|---------------------------------------|-------|-------|-------|-------|-------|-----|
| Any use Public transport 43% total | 61% | 46% | 41% | 39% | 36% | 41% |
| Any use of car 80% total | 70% | 77% | 71% | 78% | 86% | 90% |

Any public transport use by region

| East Mids | Wales | Eastern | South West | West Mids | North West | South East | North East | Yorks & Humber | Scotland | London |
|-----------|-------|---------|------------|-----------|------------|------------|------------|----------------|----------|--------|
| 29% | 32% | 33% | 33% | 34% | 38% | 38% | 43% | 43% | 49% | 80% |

Travel during Covid-19: omnibus week 1

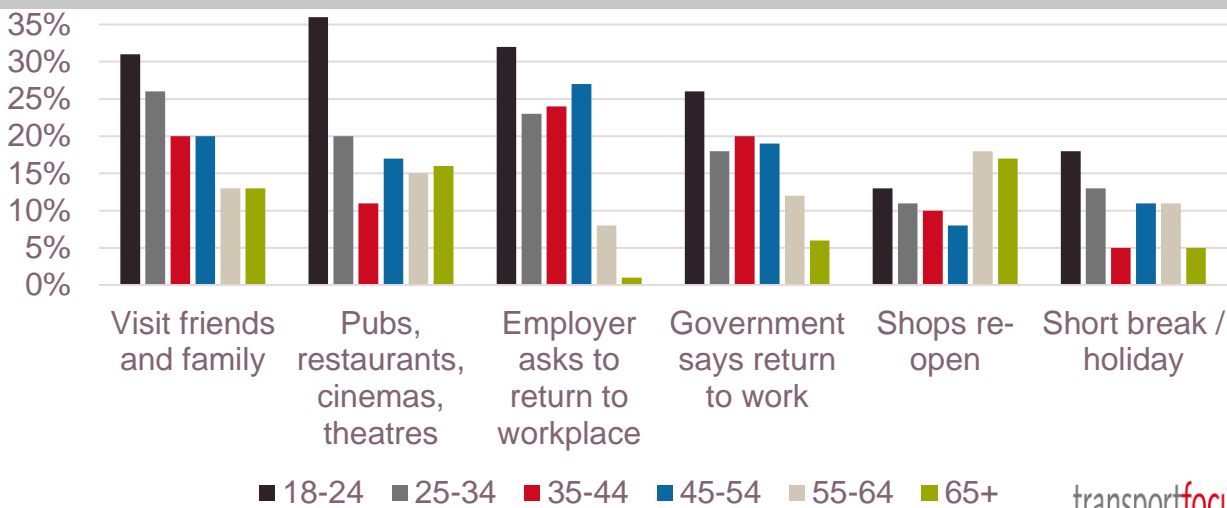
There is no single main prompt to future travel by public transport. Feeling safe is key

53% have not used public transport because they had no reason to and 39% were following government instructions

When those who previously used public transport and haven't in last 7 days will start to travel again....



Under 24's will travel for social reasons. Older groups more prompted by retail . Work reasons across all working ages



Travel during Covid-19: omnibus week 1

Attitudes to using public transport after the lockdown is eased

Overall there is hesitance around resuming public transport use and some plans to change how they travel. People have expectations there will be measures in place to protect them when using public transport.

Agreement (strongly + tend to agree) with statements

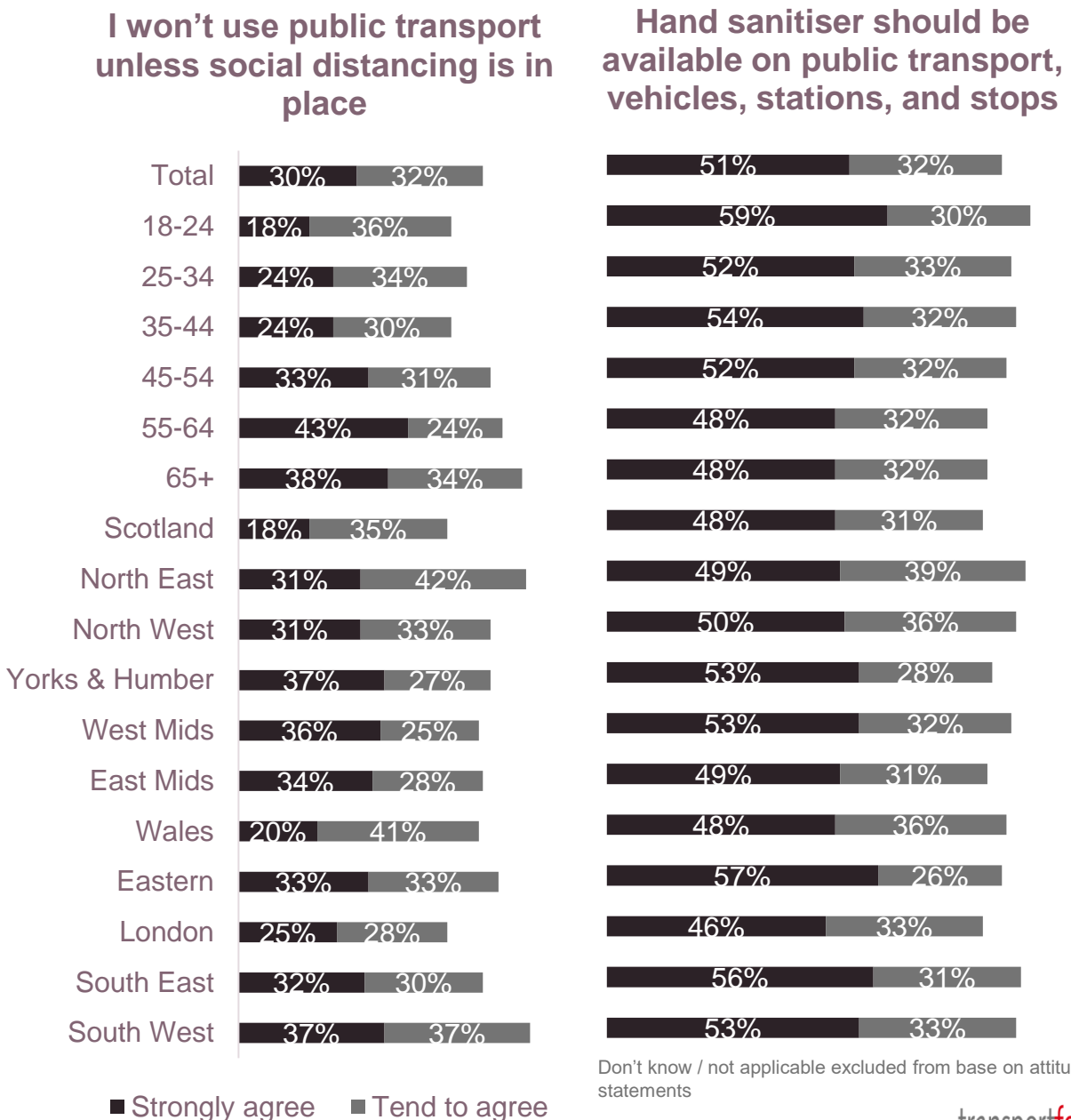
| | | | |
|--|------------|---|------------|
| Hand sanitiser should be available on public transport, on vehicles, at stations, and at stops | 83% | Once travel restrictions are relaxed, I will cycle and walk more rather than use public transport | 51% |
| I won't use public transport unless social distancing is in place | 62% | I expect to work from home more often in the future | 40% |
| Once travel restrictions are relaxed, I will drive more rather than use public transport | 60% | For my own and for others' safety I will be wearing a mask when I'm outside my home | 38% |
| I wouldn't be happy using public transport unless passengers are required to wear masks | 51% | As soon as travel restrictions are relaxed I'll be happy to travel by public transport again | 24% |

Don't know / not applicable excluded from base on attitude statements

Travel during Covid-19: omnibus week 1

Social distancing and hand sanitiser

In London there are lower expectations around social distancing and provision of hand sanitiser



Travel during Covid-19: omnibus week 1

Wearing masks

General mask wearing intentions are strongest in London and among those aged 65+. Older people are also more in support of mask wearing to be compulsory on public transport

I wouldn't be happy using public transport unless passengers are required to wear masks

For my own and for others' safety I will be wearing a mask when I'm outside my home



■ Strongly agree ■ Tend to agree

Don't know / not applicable excluded from base on attitude statements

Travel during Covid-19: Omnibus week 1

Changing behaviour by age

Greater intention to switch to cycling and walking and to work from home more often among younger respondents. Intention to drive more is broadly consistent

| Total agree (shown) | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |
|---|-------|-------|-------|-------|-------|-----|
| Once travel restrictions are relaxed, I will drive more rather than use public transport | 57% | 64% | 53% | 62% | 58% | 61% |
| I expect to work from home more often in the future | 46% | 49% | 42% | 35% | 27% | 36% |
| Once travel restrictions are relaxed, I will cycle and walk more rather than use public transport | 61% | 62% | 56% | 44% | 45% | 40% |

Current access to car impacts intentions. Although 29% of those without current access to a car intend to drive more in the future and 58% of this group will walk or cycle more rather than use public transport

Don't know / not applicable excluded from base on attitude statements

Travel during Covid-19: omnibus week 1

Changing behaviour by region

In all regions there is a high intention to switch from public transport. More working from home is anticipated across GB, but particularly in London where intention to cycle or walk is also highest

Once travel restrictions are relaxed, I will drive more rather than use public transport

| Scotland | North East | North West | Yorks & Humb | West Mids | East Mids | Wales | Eastern | London | South East | South West |
|----------|------------|------------|--------------|-----------|-----------|-------|---------|--------|------------|------------|
| 57% | 54% | 64% | 59% | 60% | 60% | 62% | 59% | 53% | 64% | 58% |

Once travel restrictions are relaxed, I will cycle and walk more rather than use public transport

| Scotland | North East | North West | Yorks & Humb | West Mids | East Mids | Wales | Eastern | London | South East | South West |
|----------|------------|------------|--------------|-----------|-----------|-------|---------|--------|------------|------------|
| 51% | 43% | 54% | 47% | 47% | 53% | 51% | 51% | 61% | 46% | 44% |

I expect to work from home more often in the future

| Scotland | North East | North West | Yorks & Humb | West Mids | East Mids | Wales | Eastern | London | South East | South West |
|----------|------------|------------|--------------|-----------|-----------|-------|---------|--------|------------|------------|
| 39% | 40% | 38% | 37% | 41% | 39% | 39% | 42% | 48% | 42% | 34% |

Don't know / not applicable excluded from base on attitude statements

Travel during Covid-19: omnibus week 1

Who is most comfortable in returning to public transport use?

18-24's are most comfortable in returning to public transport. People in Scotland and the West Midlands are the most likely, with those in the North West are least happy to return

As soon as travel restrictions are relaxed I'll be happy to travel by public transport again (total agreeing)

Total
24%

| Age and gender | |
|----------------|-----|
| 18-24 | 40% |
| 25-34 | 27% |
| 35-44 | 28% |
| 45-54 | 21% |
| 55-64 | 19% |
| 65+ | 16% |
| Male | 28% |
| Female | 21% |

| Region | |
|----------------|-----|
| Scotland | 32% |
| North East | 24% |
| North West | 19% |
| Yorks & Humber | 23% |
| West Mids | 29% |
| East Mids | 22% |
| Wales | 23% |
| Eastern | 20% |
| London | 27% |
| South East | 21% |
| South West | 26% |

Don't know / not applicable excluded from base on attitude statements

Travel during Covid-19: omnibus week 1

Who is most comfortable in returning to public transport use?

People who used public transport before the outbreak and those without vehicle access are feeling more comfortable about travelling again

As soon as travel restrictions are relaxed I'll be happy to travel by public transport again (+ agreeing)

Total
24%

| Disability | |
|------------------|-----|
| Any disability | 19% |
| No disability | 26% |
| Access to car | |
| Access to car | 22% |
| No access to car | 31% |

| Journeys made by modes before Covid-19 | |
|--|-----|
| NET: Car | 21% |
| NET: Bus | 29% |
| NET: Train | 35% |
| NET: Tram | 30% |
| NET: Any public transport | 31% |
| NET: London transport | 30% |

Travel during Covid-19: omnibus week 1

How do you think travelling will be different when the lockdown is eased?

*"I believe there will be **people who still won't want** to be travelling far and going places after lockdown like myself and there will be others who will choose to travel more because of the lockdown."*

"Maybe it will take a while for people to start trusting that transport is safe."

"I'm not sure; it will probably get busier than it ever has been as people are very eager to get out"

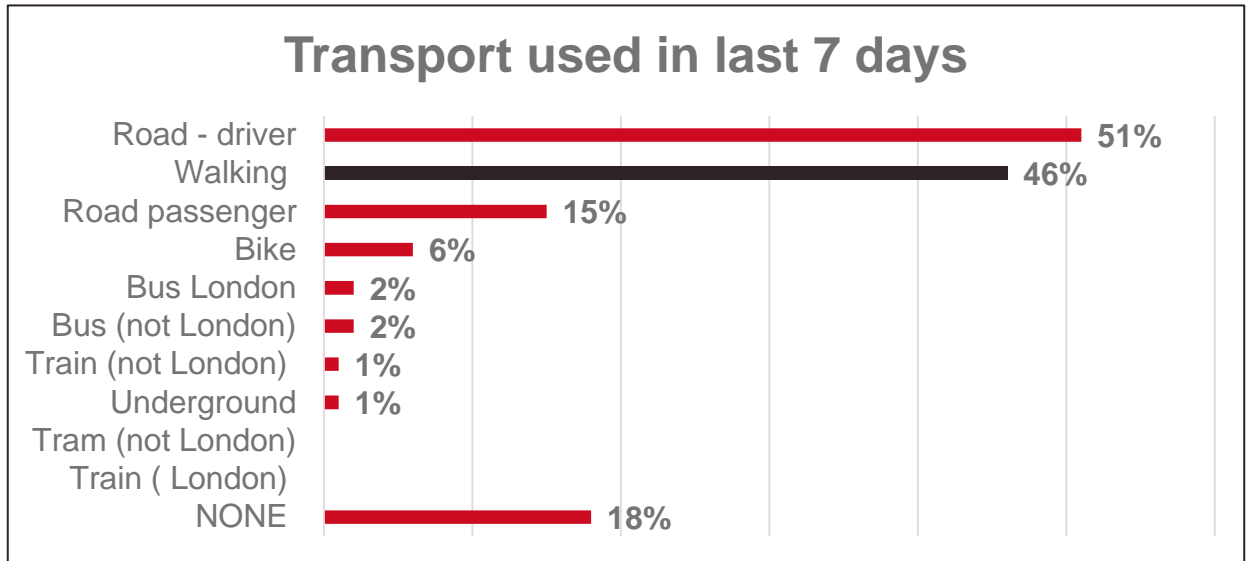
"People will respect social distancing and be scared to sit next to each other on tube or bus or train. People will want to wear masks and gloves. Still prefer to travel by car than public transport."

"I'm hoping there will be a lessening of the "rush hour crush" as employers will hopefully know by now that their employees can both work from home effectively and can stagger start/finish times with no negative effects to the business. As someone who suffers bad anxiety, panic attacks, and claustrophobia this would be very welcome!"

"Roads will become more congested, with people using their own vehicles more often because of worries over using public transport (risky infection)."

Travel during Covid-19: omnibus week 1

In the last 7 days, there has been minimal travel by public transport



Satisfaction with these aspects of the individual public transport modes is being collected. Will be reported in future as journeys increase and sample size therefore permits

- Ease of finding service running
- Ease of finding special arrangements to keep safe
- Service frequency
- Ability to socially distance
- Cleanliness
- Staff availability
- Journey time.

Travel during Covid-19: omnibus week 1

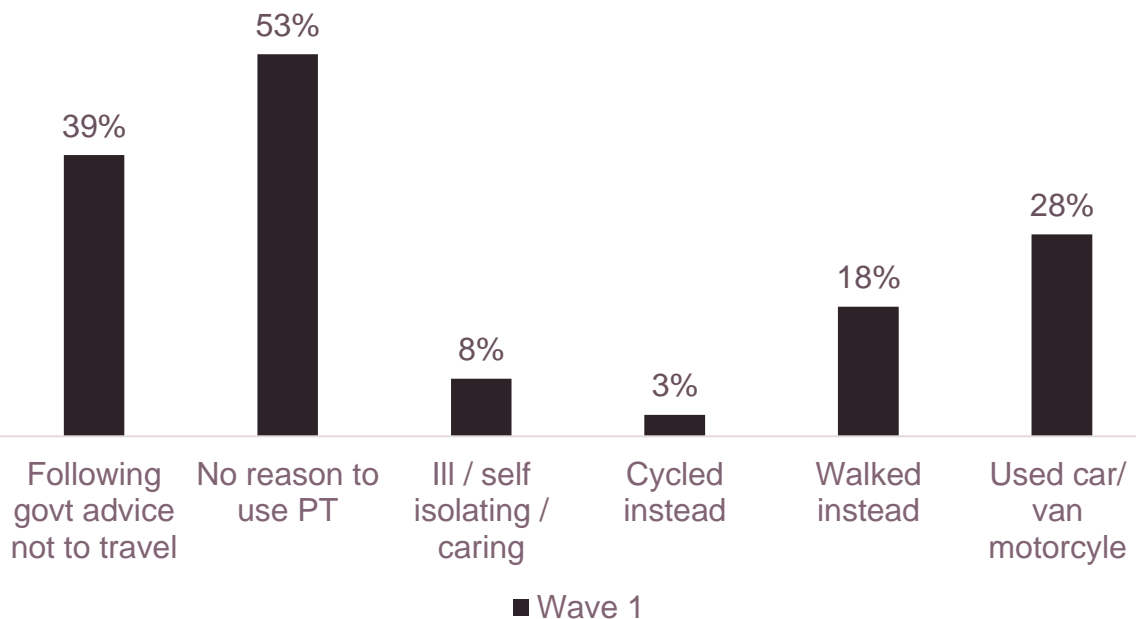
Reasons for making journeys and non-use of public transport

Reasons for making any journeys in last 7 days:

Work **22%**
Visiting / caring for friends / family **16%**
Shopping **83%**

Personal business (medical etc) **13%**
Other 14%
Prefer not to say **1%**

Reasons Public Transport not used in last 7 days



Survey method

- 2000 online interviews per week, nationally representative of Great Britain population
- Fieldwork 1-3 May 2020
- Using Populus weekly Omnibus
- To be repeated each week.

Any enquiries about this research should be addressed to:
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