



## COVID19 Pandemic – Impact on Transport Trends and Travel Behaviours

**Date of meeting** 11 December 2020

**Date of report** 17 November 2020

### Report by Chief Executive

#### 1. Object of report

The object of this report is to provide an update on the impacts of the COVID19 pandemic on transport trends and travel behaviours.

#### 2. Background

- 2.1 SPT continues to monitor the impacts of COVID19 on transport trends and travel behaviours across the region and beyond, including through participating and supporting research activities such as the on-going COVID19 Transport, travel & social adaptation study being led by the Institute for Transport Studies at the University of Leeds. The information and data gathered through this monitoring provides essential input to both operational decision-making as well as informing development of plans looking to the longer-term, such as Regional Transport Strategy.
- 2.2 Drawing upon the range of sources below, this report outlines key transport and travel behavioural impacts, and summarises future uncertainties around personal travel demand:
  - Transport Scotland - COVID19 Transport Statistics<sup>1</sup>;
  - Transport Scotland - COVID19 Public Attitudes Survey<sup>2</sup>;
  - Department for Transport - COVID19 Transport Statistics<sup>3</sup>;
  - Transport Focus - Travel during COVID19 Weekly Omnibus survey<sup>4</sup>;
  - Institute for Transport Studies, University of Leeds - COVID19 Transport, travel & social adaptation study; and
  - Office of National Statistics Coronavirus and social impacts tracking survey<sup>5</sup>.

#### 3. Update

##### 3.1 Overview of Transport Demand in Scotland

Following the onset of the COVID19 pandemic and subsequent lockdown, transport demand in Scotland fell by over 50% overall, and by 90% for public transport. Demand has been increasing gradually since removal of lockdown in the summer,

<sup>1</sup> <https://www.transport.gov.scot/coronavirus-covid-19/analysis/>

<sup>2</sup> <https://www.transport.gov.scot/coronavirus-covid-19/analysis/>

<sup>3</sup> <https://www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic>

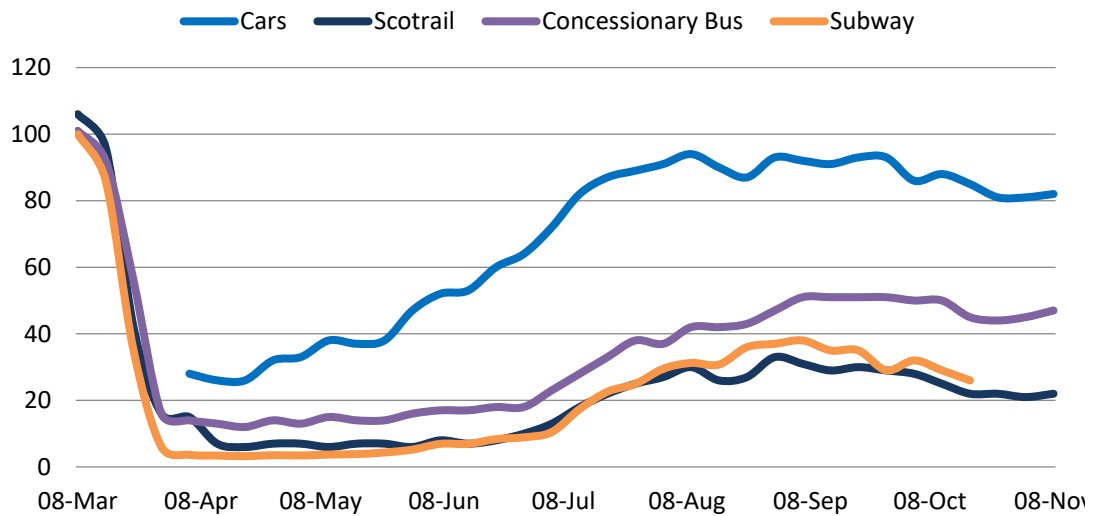
<sup>4</sup> <https://www.transportfocus.org.uk/>

<sup>5</sup> <https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandwellbeing/bulletins/coronavirusandthesocialimpactsongreatbritain/13november2020>

with overall demand nearing early 2020 (pre-COVID19) levels by September. However, more recently demand has fallen in parallel with new restrictions introduced in response to increasing case numbers.

In terms of demand by mode, as shown in Figure 1, travel by car was nearing 2019 levels by August and September but has fallen back to around 80% of 2019 levels by early November. At the same time, public transport demand has continued to trend well below equivalent periods in 2019, although there has been a stronger demand for bus travel when compared with rail.

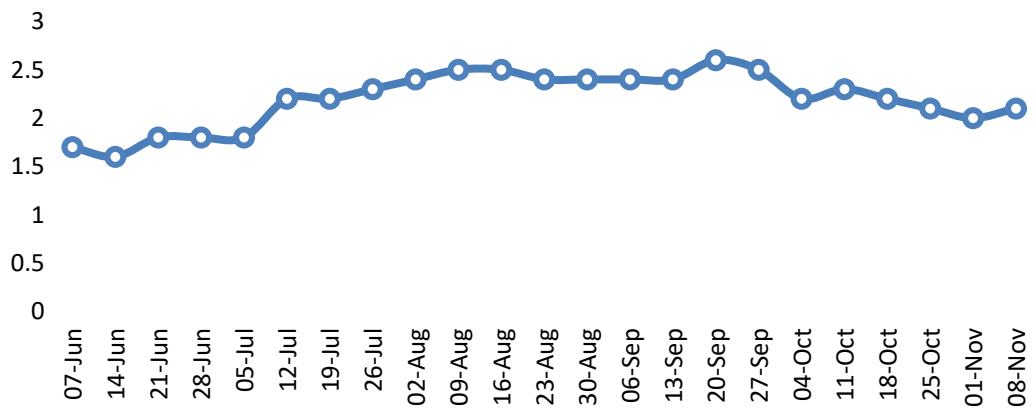
**Figure 1: Transport demand in Scotland**  
**Indexed volumes by mode**  
 100 = Equivalent week in 2019



Source: Transport Scotland COVID19 Statistics and SPT

This pattern is mirrored in the average number of journeys made per day per person in Scotland, as shown in Figure 2. Journeys had been increasing to a peak of 2.6 journeys per person per day by mid-September; however, this has fallen back to 2.1 journeys by the second week of November.

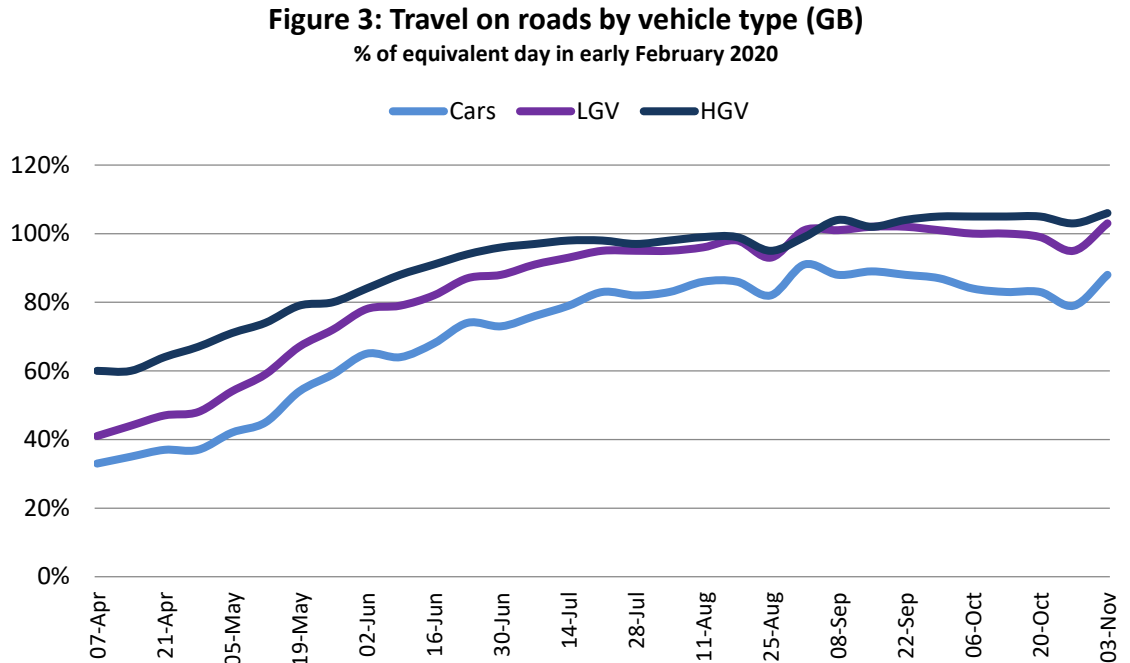
**Figure 2: Average no. of journeys per person per day**



Source: Transport Scotland - COVID19 Transport Statistics

### 3.2 Cars and roads freight (Great Britain)

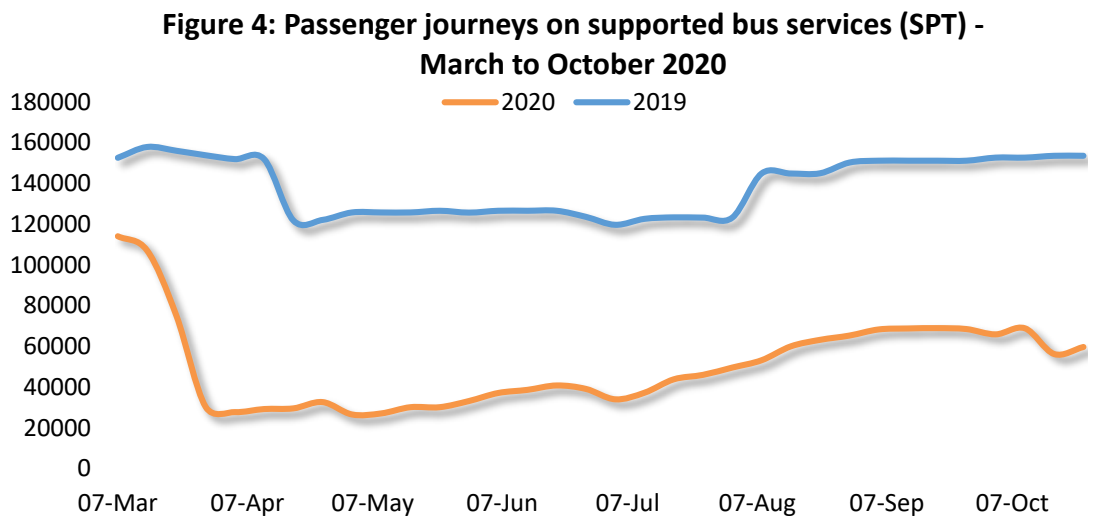
At a GB-wide level, Figure 3 shows car travel peaked (to date) in early September at 91% of equivalent weekday traffic in February 2020, but, like Scotland, has fallen back more recently. Light Goods and Heavy Goods traffic returned to pre-lockdown levels in July and broadly has remained stable since that time.



Source: Department for Transport - COVID19 Transport Statistics

### 3.3 Bus

Current patronage on SPT-supported bus services is around 40% of 2019 figures, as shown in Figure 4, and has generally been slightly below the national concessionary bus figures shown in Figure 1, although these use different methods and data sources. At GB-level, bus usage outside London has been higher with patronage broadly remaining around 60% of 2019 levels since early September.



Source: SPT

### 3.4 Rail

ScotRail passenger numbers across Scotland were around 30% of the equivalent period in 2019 throughout September, but have fallen back to 22% of 2019 levels during November. In Strathclyde, numbers were slightly higher at around one-third of the 2019 equivalent during August and September, but are now similar to the national figures. At GB-wide level, National Rail passenger numbers reached a high of 43% of pre-lockdown levels in early September, but have fallen back to 24% in mid-November.

### 3.5 Subway

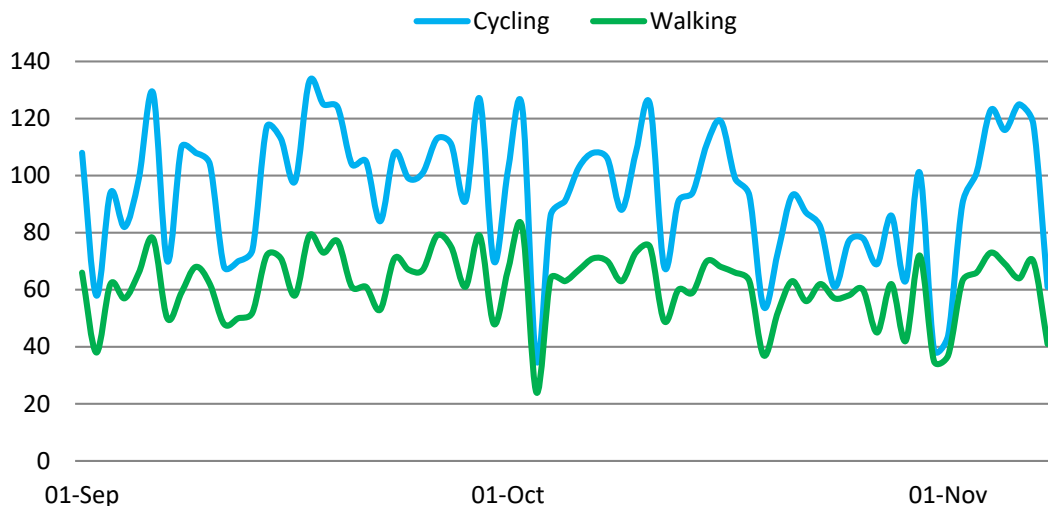
Subway passenger numbers had been increasing steadily from a low of around 3% during the first lockdown earlier in 2020 to circa 30-35% towards September and October. Since then, and likely heavily compounded by the impact of the relatively new 'Level 4' restrictions, the daily number has fallen back to around 20% of the pre-COVID19 levels of 2019.

### 3.6 Walking and Cycling

Recent cycling volumes are broadly above 2019 levels, although there is significant variance day to day as shown in Figure 5, partially due to weather conditions. Walking volumes are mostly below the 2019 equivalent levels; however, since many counters used to collect the data are located in high pedestrian flow areas such as town and city centres, any increased walking behaviours within outlying communities may not be counted. Behavioural surveys continue to report increased walking levels compared to pre-COVID19.

**Figure 5: Walking and Cycling volumes (Scotland)  
2020 compared to 2019 (daily)**

100 = equivalent 2019 time period



Source – Transport Scotland COVID19 Transport Statistics

### 3.7 Future uncertainties

This section highlights some of the future uncertainties for transport policy and planning arising from the disruption caused by the impacts of COVID19.

#### 3.7.1 Demand for personal travel

COVID19 has had substantial impacts on personal demand for travel and, although trips at Scotland-wide level were recovering towards pre-lockdown conditions for a period in September, there remains a high degree of uncertainty over future travel demand, and to what extent and in what ways COVID19 impacts or accelerates existing long term trends.

By far, pre-COVID19, commuting to work and shopping were the most significant drivers of personal travel demand in the region, with at least half of all journeys made for these purposes<sup>6</sup>. Further, there was an existing trend towards more home working in the region – with the proportion of employed adults working mainly from home doubling from 5% in 2001 to 10% in 2011.<sup>7</sup> The extent to which home working will continue at present levels is not clear, but the findings from a range of different research activities demonstrate the potential for substantial change over the longer term:

- According to Office of National Statistics Coronavirus and social impacts tracking survey, as shown in Figure 6, 27% of UK employed adults worked from home exclusively during the first week of November and a further 11% worked partly from home and partly at another workplace away from home. Only about a quarter of people who were working from home, wholly or in part, normally did so prior to COVID19.
- According to the most recent Public Attitudes Survey by Transport Scotland<sup>8</sup>, 70% of respondents had not left home to go to work over the previous 7 days and 39% agree or strongly agree that they expect to work from home more often in future.
- At the end of September, according to the Transport Focus COVID19 weekly tracker survey, 53% of people in Scotland who are in employment expect to work from home more often in future.
- During the initial lockdown, only three in every ten employed persons in the SPT region reported that their job could not be carried out from home at least in part, according to the ITS COVID19 Transport, Travel and Social Adaptation study.<sup>9</sup>

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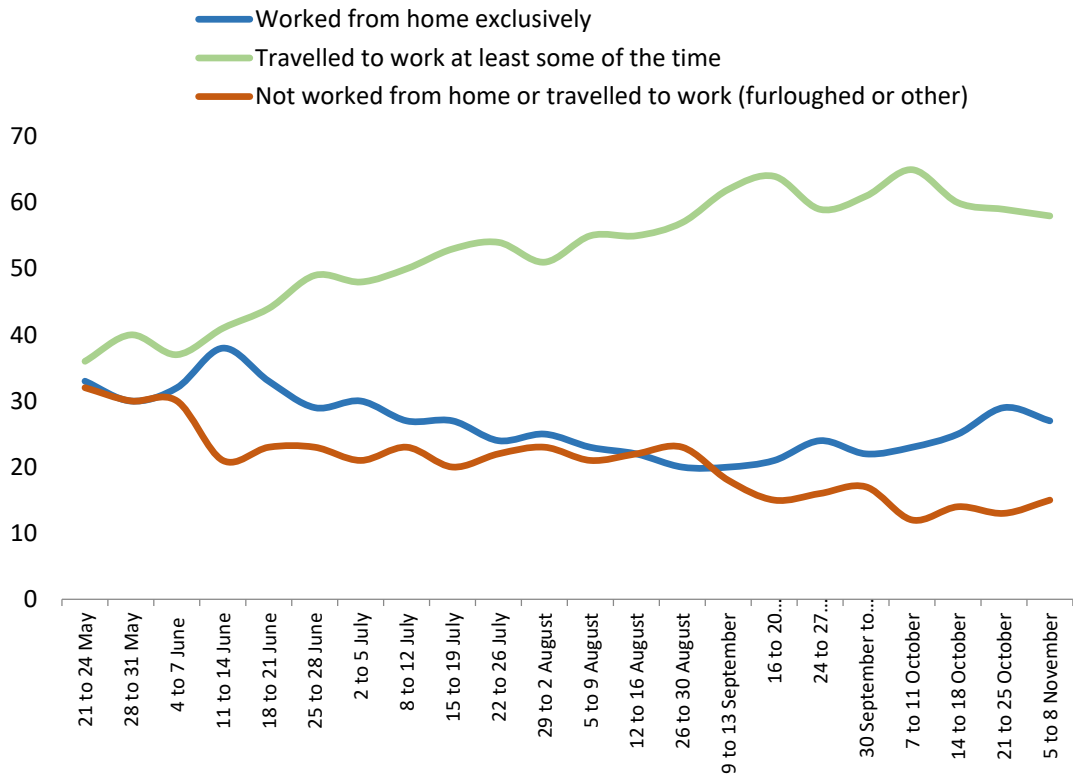
<sup>6</sup> Travel and Transport In Scotland, Local Area Tables, Transport Scotland

<sup>7</sup> Scotland Census 2001 and 2011; National Records of Scotland

<sup>8</sup> COVID19 Public Attitudes Survey, Transport Scotland – Wave 9 (30 Sept – 6 Oct)

<sup>9</sup> Institute for Transport Studies, University of Leeds – COVID19 Transport, travel & social adaptation study

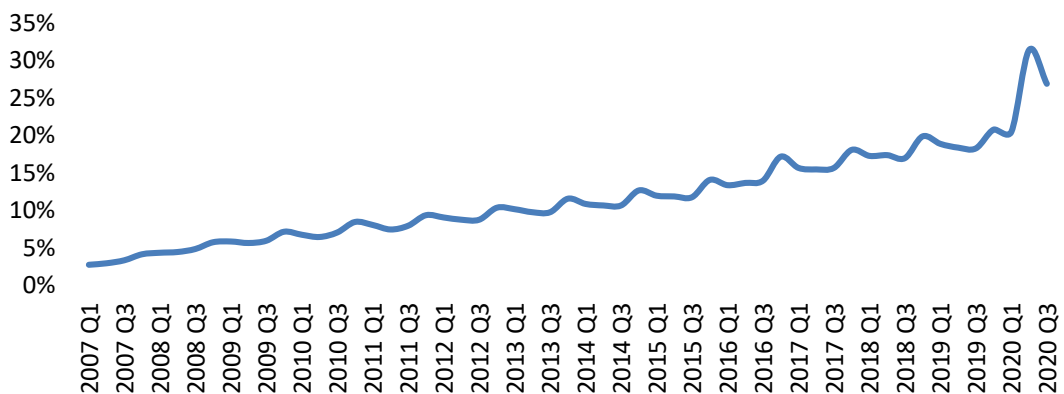
**Figure 6: Working from home, travel to work, and on furlough: Proportion of adults (Great Britain) per week**



Source: Office of National Statistics Coronavirus and social impacts tracking survey

Retail markets were already undergoing structural change prior to COVID19, with shopping behaviours increasingly moving towards online purchases, evidenced by the percentage of sales made online increasing from 6% to 19% in the 10 years to 2019. COVID19 has had a substantial further impact on this with nearly one-third of retail sales made online during the second quarter of 2020, as shown in Figure 7.

**Figure 7: Internet sales as percentage of total retail sales (UK)**



Source: Office of National Statistics Coronavirus and social impacts tracking survey

There is also evidence that residents of the SPT area anticipate that their experiences this year will continue to shape their future shopping behaviours, with a quarter of residents stating that they will shop online more often for food in future compared to pre-lockdown, and nearly three in ten residents will shop online more often for non-food items in future, according to ITS Leeds as shown in Figure 8.

**Figure 8: % of residents who will shop online more often after lockdown compared to before**



Source: Institute for Transport Studies, University of Leeds – COVID19 Transport, travel & social adaptation study

It is worth emphasising that these factors affect more than travel demand, including the demand for office and retail space, and the vitality of town and city centres. At the same time, the nature and trajectory of the wider economic recovery will have a large impact on travel demand too.

### 3.7.2 Changes to travel by mode

In the SPT area, public transport usage has been decreasing overall over the past decade and longer, whilst demand for car travel has been increasing, particularly in terms of the rising number of multi-vehicle households and single occupancy trips. However, the share of public transport as a proportion of all commuter travel has remained consistent over the past decade, albeit with different trajectories for bus and rail demand.

COVID19 has had substantial impacts on demand by mode of transport, influenced by a range of factors including: government advice; changes in trip making purpose and patterns; perceptions of safety; and reduced capacities on vehicles and carriages. According to a recent Transport Focus weekly COVID19 tracker survey,<sup>10</sup> a majority of people who are not currently using buses or trains say they would not feel safe doing so at this time, with 57% saying they would feel not very safe or not at all safe on trains and 65% saying the same of buses. At the same time, most people who are currently

<sup>10</sup> Travel during COVID19 survey – Tracking research Week 28 (13 November); Transport Focus

using buses or trains broadly feel safe doing so (specifically in relation to the coronavirus) with 76% of bus users and 85% of train users saying they feel very or fairly safe travelling by these modes.

The extent to which these current changes in modal share will continue is highly uncertain, but there is evidence of the potential for medium or long term change:

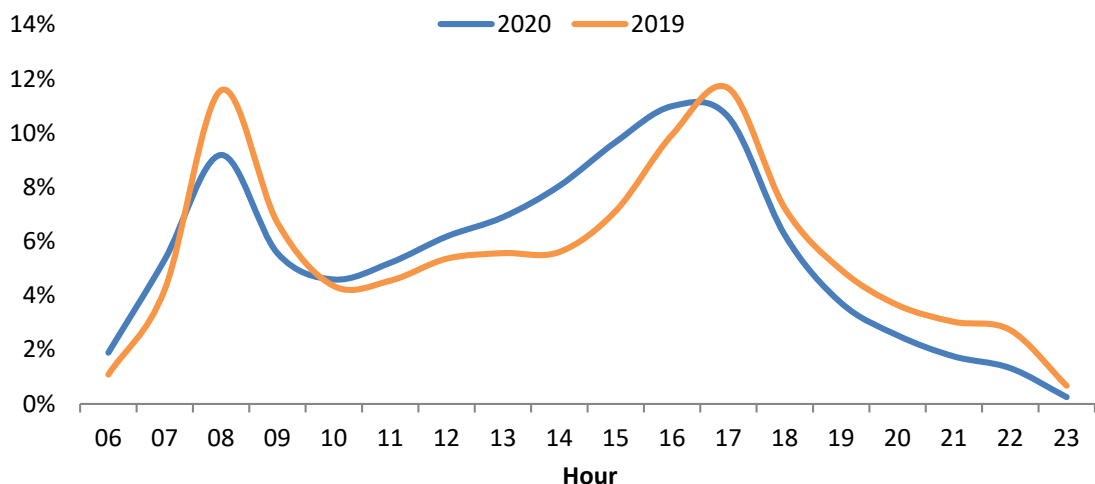
- 19% of Scottish respondents said they will use a car more often in future for journeys than they would have otherwise made by public transport, according to a recent Transport Focus weekly COVID tracker survey; and
- 48% of respondents agree with the statement “I will avoid public transport and use my car or other vehicle more than I did before when restrictions on transport are lifted”, according to the latest wave of Transport Scotland’s Public Attitudes Survey.

However, according to the ITS Leeds research, a smaller proportion of residents in the region say they are likely to get a driving licence or purchase a car in the next 12 months compared to their pre-lockdown intentions. Additionally, people who have a car are not necessarily using it as often as in the past due to their reduced need to travel, with many people expressing positive attitudes about this reduction in use, according to ITS Leeds research.

### 3.7.3 Travel by time of day

There is also uncertainty around demand for travel at traditional peak periods. Off-peak travel on rail has been recovering more quickly, proportionately, than peak travel, whilst Subway peak demands have changed, proportionate to last year, as shown in Figure 9. This also shows that the AM peak hour has lowered proportionately to 2019 and the PM peak has spread and begins earlier than in 2019.

**Figure 9: Subway hourly boardings as % of total daily boardings (w/c 26 Oct)**



Source: SPT



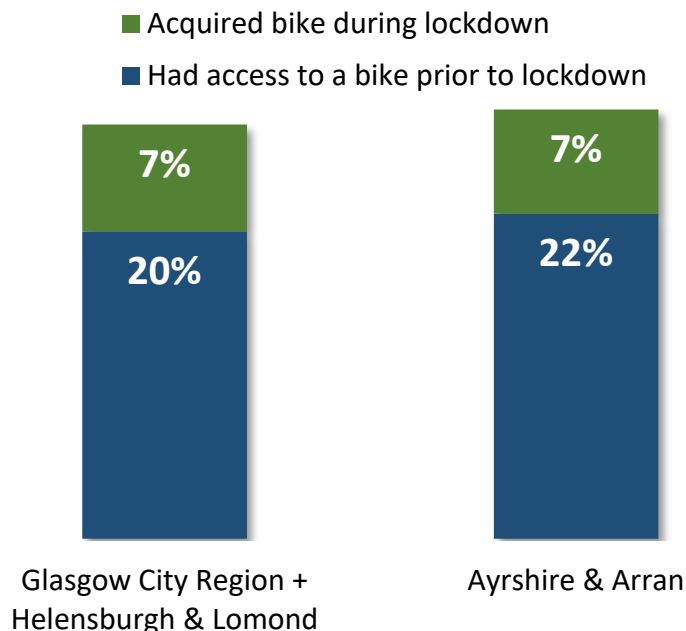
The extent to which peak period travel on public transport services will recover in the longer term is almost certainly highly linked to the extent to which office occupation returns to pre-COVID19 levels, and to the nature of the economic recovery of town and city centres.

### 3.7.4 Sustaining uplifts in Walking, Cycling and Wheeling

Another future uncertainty is the extent to which increases in walking, cycling and wheeling activity and bike ownership over the past year can be sustained and bring about longer term change to healthier and more sustainable behaviours.

According to ITS Leeds, 7% of people in the region acquired a bike during the initial COVID19 lockdown earlier in 2020 as shown in Figure 10. This is a substantial increase in a short period of time. Additionally, according to Transport Scotland's latest Public Attitudes Survey, 3% of people in Scotland are travelling by bike more often and 30% are walking more often compared to pre-COVID19 behaviours whilst two-thirds (63%) either strongly or somewhat agree that they will walk or cycle more often than in the past, once travel restrictions are lifted. It is worth highlighting however, that growth in cycling and walking during and after the initial lockdown could be in regard to leisure trips, not travel to work, thereby creating another uncertainty about the sustainability of the recent growth in active travel. Further, nearly three-quarters (74%) of people are travelling by car as their main mode for key trip purposes such as work and shopping (food and non-food).

**Figure 10: % of residents with access to a bike for private use and when acquired**



Source: Institute for Transport Studies, University of Leeds – COVID19 Transport, travel & social adaptation study

### 3.7.5 Inequalities of access to transport

The reduction in capacity and usage of public transport during COVID19 is likely to have had disproportionate impacts on people and groups that are dependent upon public transport for travelling to work, reaching essential services and goods, and carrying out activities important to wellbeing, although more evidence is required to understand these impacts. At the same time, there are existing inequalities of access to alternative modes and methods of travel; for example, financial barriers to car ownership or taxi usage that may be further exacerbated by COVID19, including economic hardship faced by individuals and households. Any future reductions in public transport networks or services resulting from a sustained revenue loss may further reduce accessibility for disadvantaged individuals and communities.

Further, reductions in the need to travel due to the ability to be able to remotely digitally access work, goods and services will not be equally distributed across the regional population. At the same time, improvements to digital access and changes to flexible working policies may benefit some people or groups who have reduced access to transport or reduced mobility. More evidence is required to ensure existing socio-economic and health outcomes and inequalities are not further reinforced.

COVID19 has also brought increased attention to problems of access to safe and high quality walking and cycling infrastructure particularly for disabled persons, children and disadvantaged communities. The outcomes of processes to understand, mitigate and address these problems are likely to have long term positive impacts for the delivery of active travel policy and outcomes.

## 4. Conclusion

The long-term impact of the COVID19 pandemic on transport trends and travel behaviours remain uncertain. However, as can be seen from this report, there is significant work going into the gathering of data and the undertaking of research and analysis to better understand the impacts to inform transport policy and strategy-making. For SPT, this research and analysis is vital in relation to operational readiness and in developing the new Regional Transport Strategy, and officers will continue to keep the Partnership informed in relation to the impact of COVID19 on trends and behaviours in the future.

## 5. Partnership action

The Partnership is recommended to note the contents of this report.

## 6. Consequences

Policy consequences	<i>The development of the new RTS will need to take into account changing trends and behaviours arising from COVID19.</i>
Legal consequences	<i>None at present.</i>
Financial consequences	<i>None at present.</i>

Personnel consequences	<i>None at present.</i>
Equalities consequences	<i>The impacts of COVID19 on transport as it affects equalities groups will continue to be closely monitored.</i>
Risk consequences	<i>None at present.</i>

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