



the science of insight

# COVID-19



## TRANSPORTATION INSIGHTS PANEL

December 2, 2020

# Key Topics

- Survey Methodology
- Unweighted Data Representation and Weighting Methodology
- Survey Results and Trends
- Summary Observations and Data Applications
- Q & A



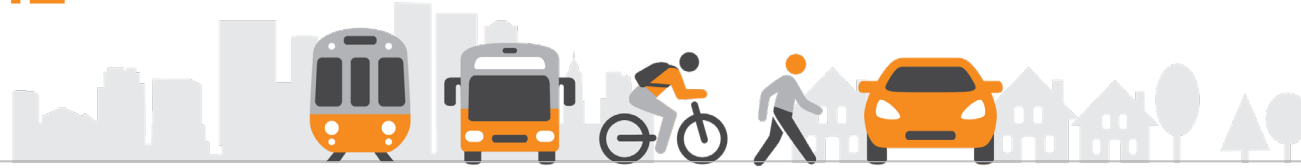


# Survey Methodology

## AN OVERVIEW OF THE

# COVID-19

## TRANSPORTATION INSIGHTS PANEL



Nationally representative repeated cross-sectional survey



Captures how travel behaviors and attitudes are changing with COVID-19



Powerful tool as conditions, sentiments, and choices continuously evolve in 2020–2021

**To-Date: Survey Fielded in May, July, August, October**

# Designed for Repeatable Implementation As COVID-19 Evolves

**COVID-19 TRANSPORTATION INSIGHTS PANEL**

Assuming that your employer allowed you to continue to work from home, how often would you choose to work from home when you are allowed to commute to work again?

- 6-7 days a week
- 5 days a week
- 4 days a week
- 2-3 days a week
- 1 day a week
- 1-3 days a month
- Less than monthly
- Never

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89%

Source: COVID-19 Transportation Insights Panel Survey

- Administered first survey in early May
- 3,000+ participants recruited each wave via national online panel and monitored for representation
- Data are weighted to ensure regional and demographic representation
- New survey waves every ~1-2 months as COVID-19 outbreak and response behavior evolves
- Collects demographics, including:
  - Household size, income, vehicles
  - Person race, ethnicity, education, age
  - Work and school locations / commuting

# More Than 100 Questions Measuring Both Baseline Behaviors and Ongoing Changes

- Travel behavior in the past week and in a typical before the COVID-19 outbreak including commuting choices, mode use, shopping decisions, and exercise habits
- Detailed questions on trip replacement behaviors in the past 30 days due to COVID-19
  - Changes to long-distance travel (e.g., business trips, attend university, family visits, vacation)
  - Current and future work and school plans (e.g., telework and remote school)
  - Attitudes about traveling in the current environment and in future scenarios (e.g., with and without vaccines or COVID-19 safety measures)



# Attitudes Towards Traveling in Current COVID-19 Situation

- “I think everyone should stay home as much as possible until there is a vaccine”
- “Shutting down businesses to prevent the spread of COVID-19 is not worth the economic damage that is resulting”
- “I would attend an outdoor sporting or cultural event if all spectators are seated at least six feet apart”
- “I would be willing to make a two-hour flight for a vacation/leisure trip by air if middle seats are kept empty”
- “I think schools should be all remote/online instead of in-person until the number of new COVID-19 cases in the area where I live is much lower than now”



# What Will Future Typical Travel Look Like?

- How often would you work from home if your employer continued to allowed it?
- Which factors are likely to influence transit travel resumption?
- How has COVID-19 influenced shared and active modes?
- Does current and future teleworking preferences vary by demographics?
- How do changes in school structures influence travel?



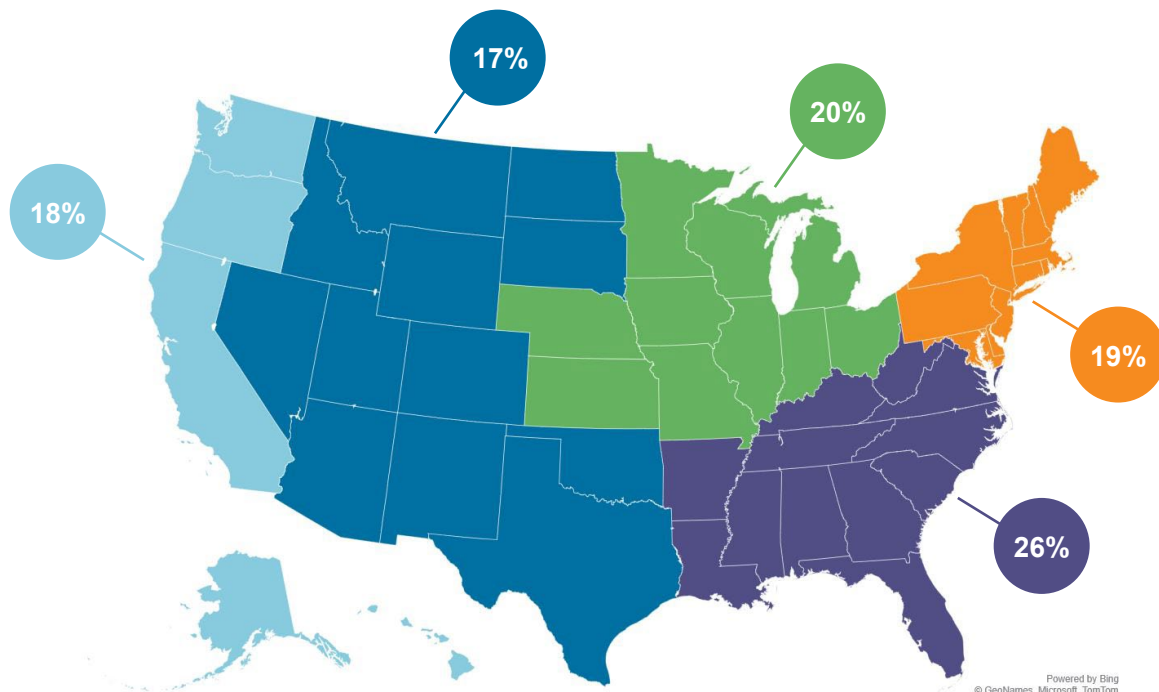




# Unweighted Data Representation and Weighting Methodology

# Representative Unweighted Demographic Composition

12,000+ Respondents Surveyed To-Date



Race	Sample	U.S. Population*
White	78%	73%
Black / African American	12%	13%
Asian	6%	5%
Other	1%	6%
Two or more races	3%	3%

Ethnicity	Sample	U.S. Population*
Hispanic or Latino	18%	18%

Age (Adults)	Sample	U.S. Population*
18 - 34	27%	30%
35 - 64	51%	50%
65 or older	22%	20%

Income	Sample	U.S. Population*
Under \$25,000	20%	20%
\$25,000 - \$49,999	25%	22%
\$50,000 - \$99,000	32%	30%
\$100,000 or more	23%	28%
Prefer not to answer	1%	--



# Weighting Methodology

Each wave is weighted individually to allow for cross-wave analysis.

## WEIGHTING CONTROLS:





- **Regions:** Northeast, Midwest, Southeast, Texas / Mountain, Pacific
- **Household-Level:** Income group, household size, workers, vehicle ownership, and type
- **Person-Level:** Age group, previous employment status, gender by presence / absence of children, race / ethnicity by income (under and over \$50,000)

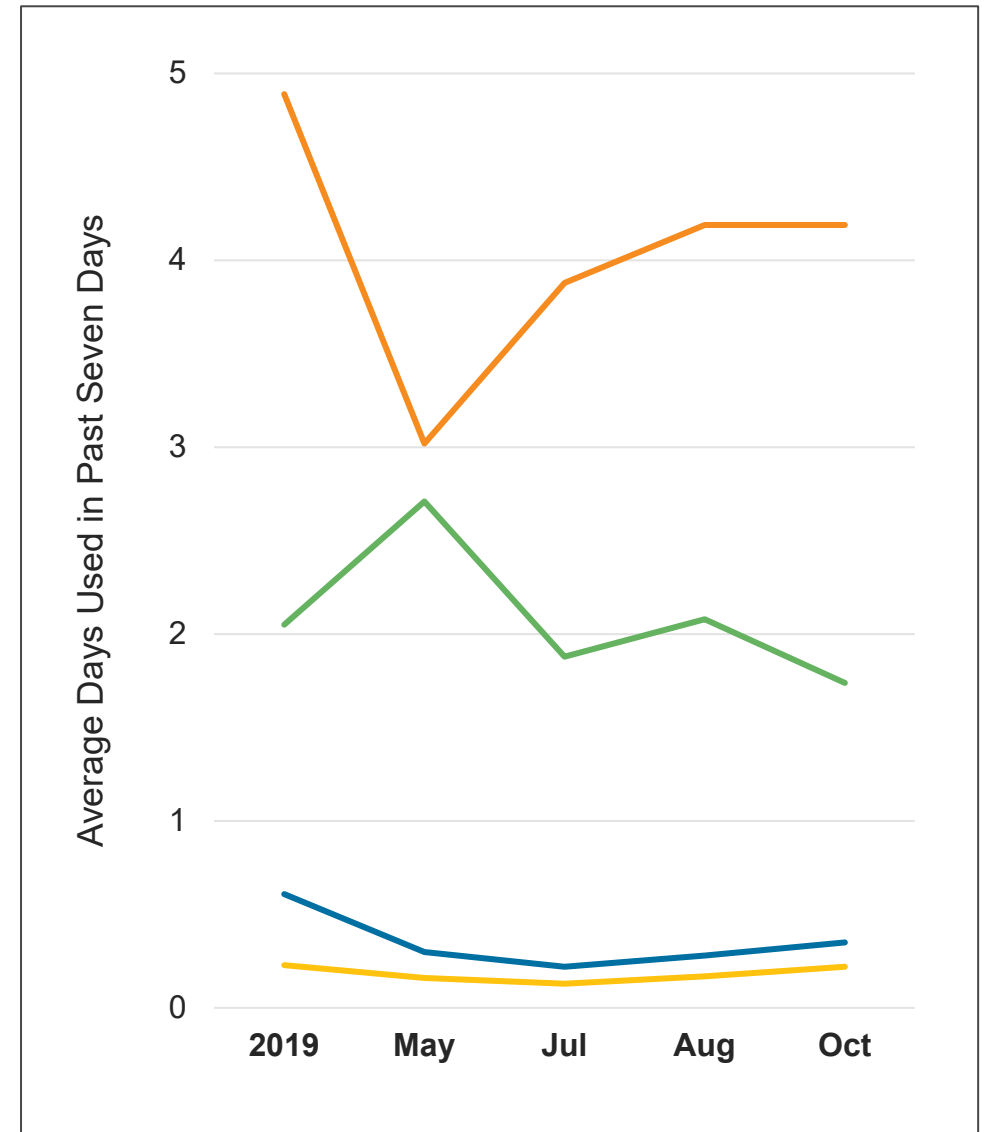




## Survey Results and Trends

# Personal / Active Travel Modes Replacing Shared Travel Modes

Average Number of Days Used Mode in Past Seven Days		2019	May	Jul	Aug	Oct
	Personal Vehicle	4.89	3.02	3.88	4.19	4.19
	Walk / Bike	2.05	2.71	1.88	2.08	1.74
	Transit	0.61	0.3	0.22	0.28	0.35
	Taxi / TNC	0.23	0.16	0.13	0.17	0.22



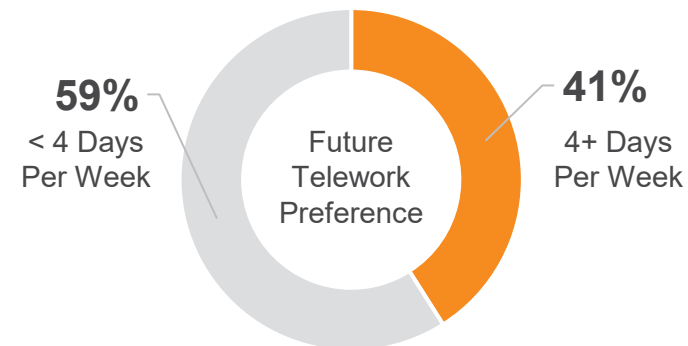
# Typical Transit Behavior May Change in the Future (October)



Among frequent transit users\*,  
**8 in 10** have used transit in  
the past week



**61%** of frequent transit  
commuters\*\* who currently  
travel to work do so by transit



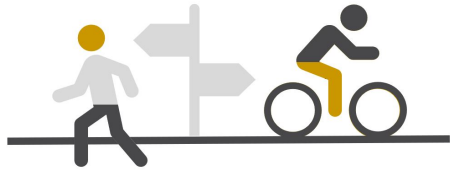
Among frequent transit commuters\*\*  
currently working from home, **41%**  
would like to work from home 4+  
days per week in the future

\*Used transit at least weekly before mid-March 2020

\*\*Commuted primarily by transit before mid-March 2020



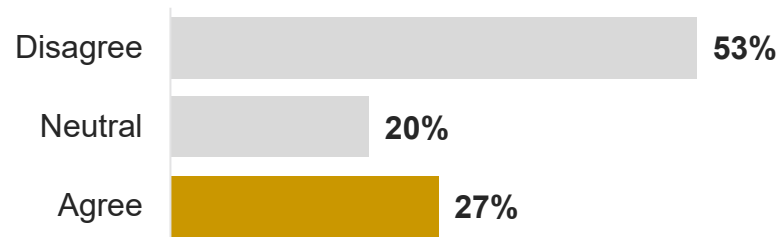
# Active Transportation Has Held Steady During COVID-19 (October)



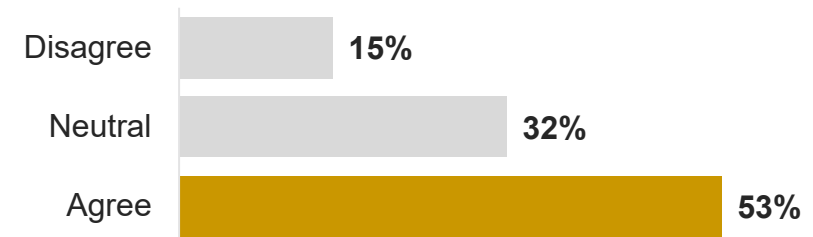
**73%** exercised outside at least once in the past seven days

**73%** exercised outside at least weekly during the same month in 2019

“If I had an electric bicycle available to use, I would use it in to make some trips I currently make by car or transit.”



“When walking or biking, I would prefer to use a designated Open Street that restricts vehicle traffic or provides widened sidewalks.”

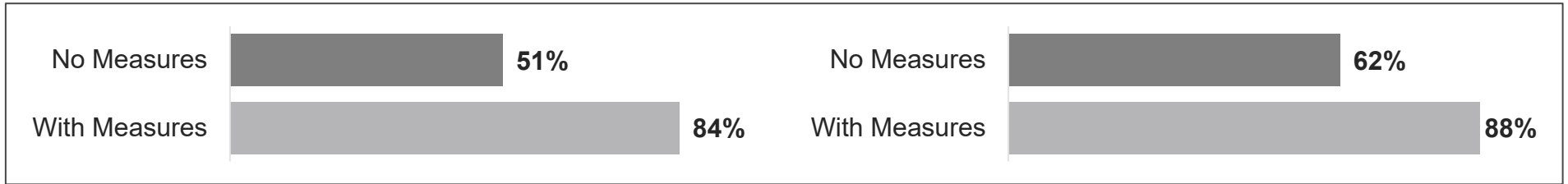


# Willingness to Travel Using Shared Modes in Future Varies by Health Measures, Even With a Vaccine

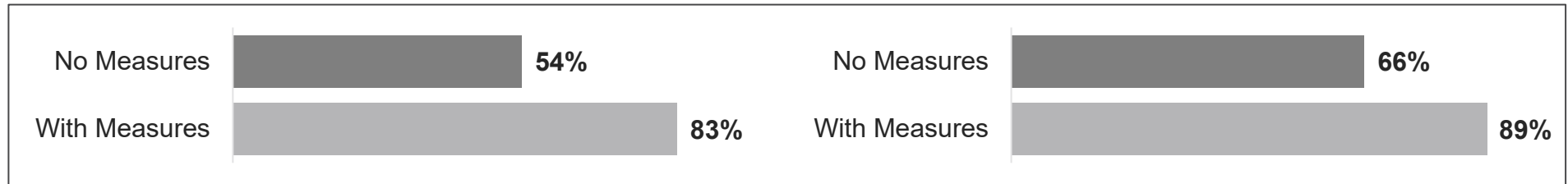
Vaccine Available, Cases Decreasing

Vaccine Widely Used, Few New Cases

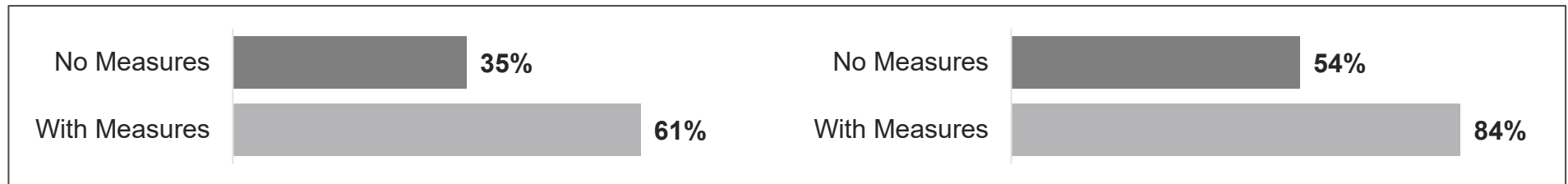
**Weekly Transit**  
(Among Previous Weekly Riders)



**Monthly Taxi / TNC**  
(Among Previous Monthly Riders)



**Yearly Air**  
(Among Previous Yearly Travelers)



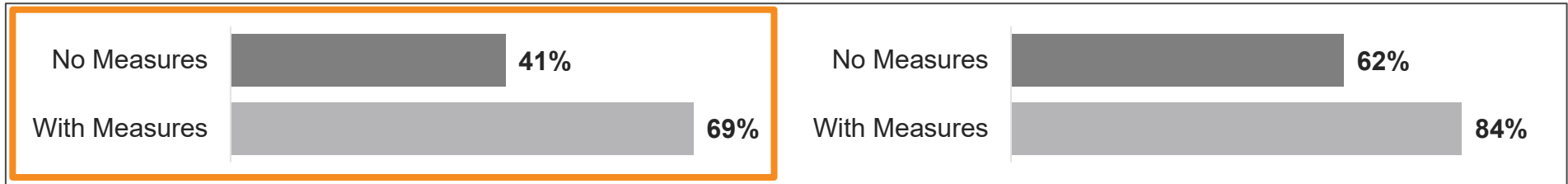


# Willingness to Travel Using Shared Modes in Future Varies by Health Measures, Even With a Vaccine **in Southeast**

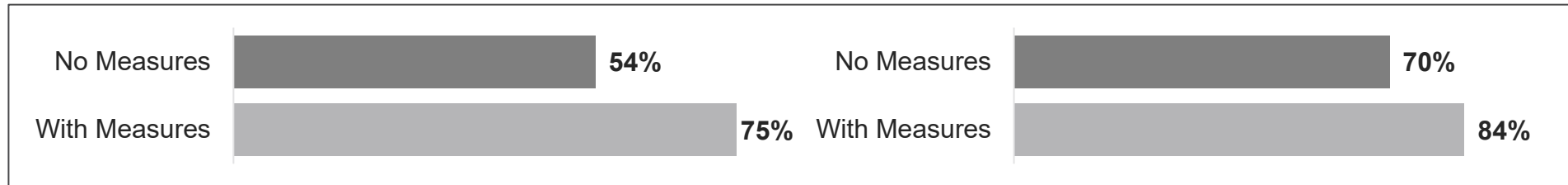
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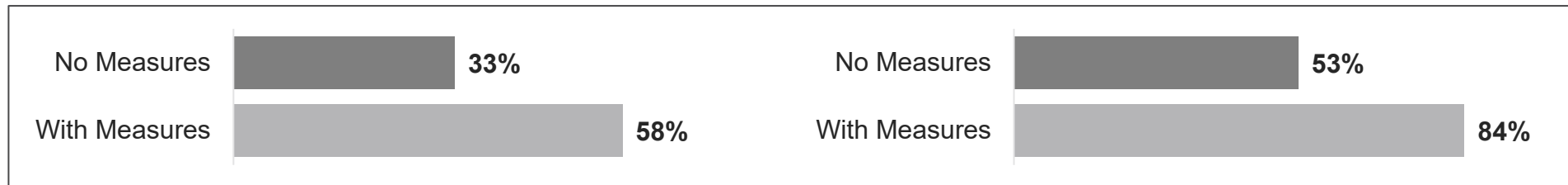
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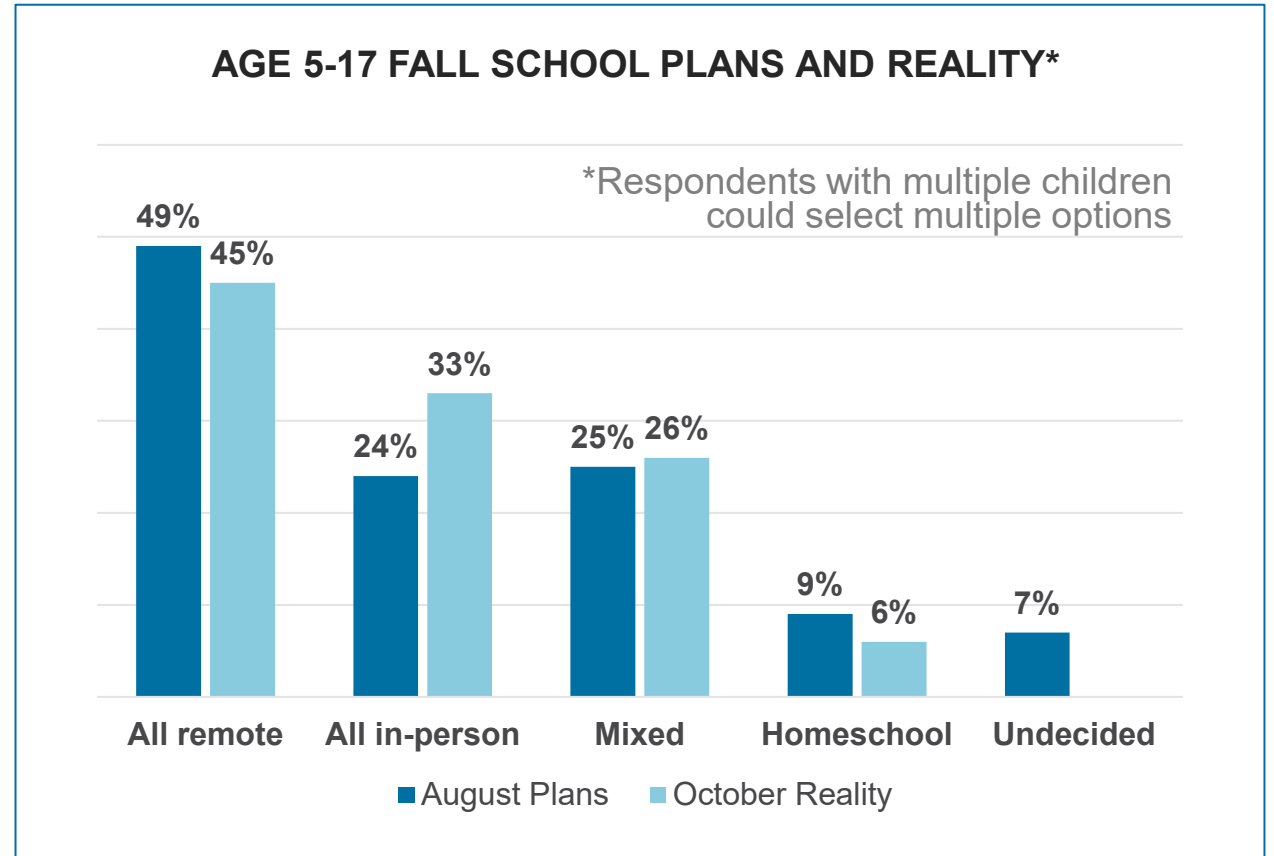
**Yearly Air**  
(Among Previous Yearly Travelers)



# Virtual School is the Current Norm (October)



**58%** think schools should stay remote until the number of COVID-19 cases where they live is much lower than now



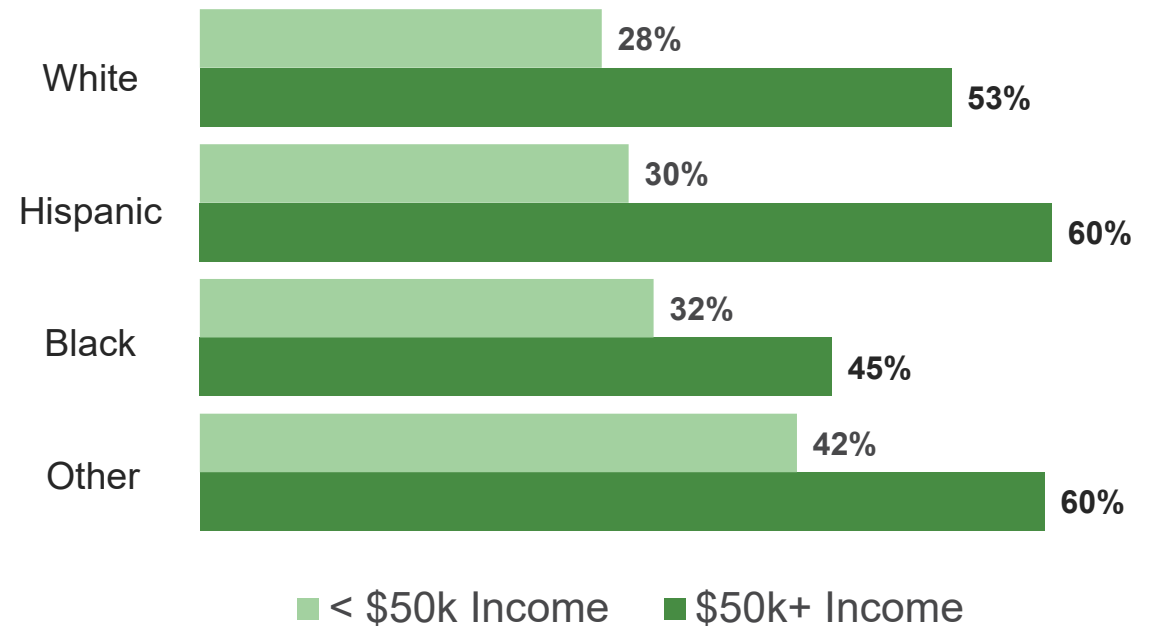
# Telework Plans Vary By Demographics (October)



**57%** of male respondents currently working at home would like to work from home four or more days per week in the future.

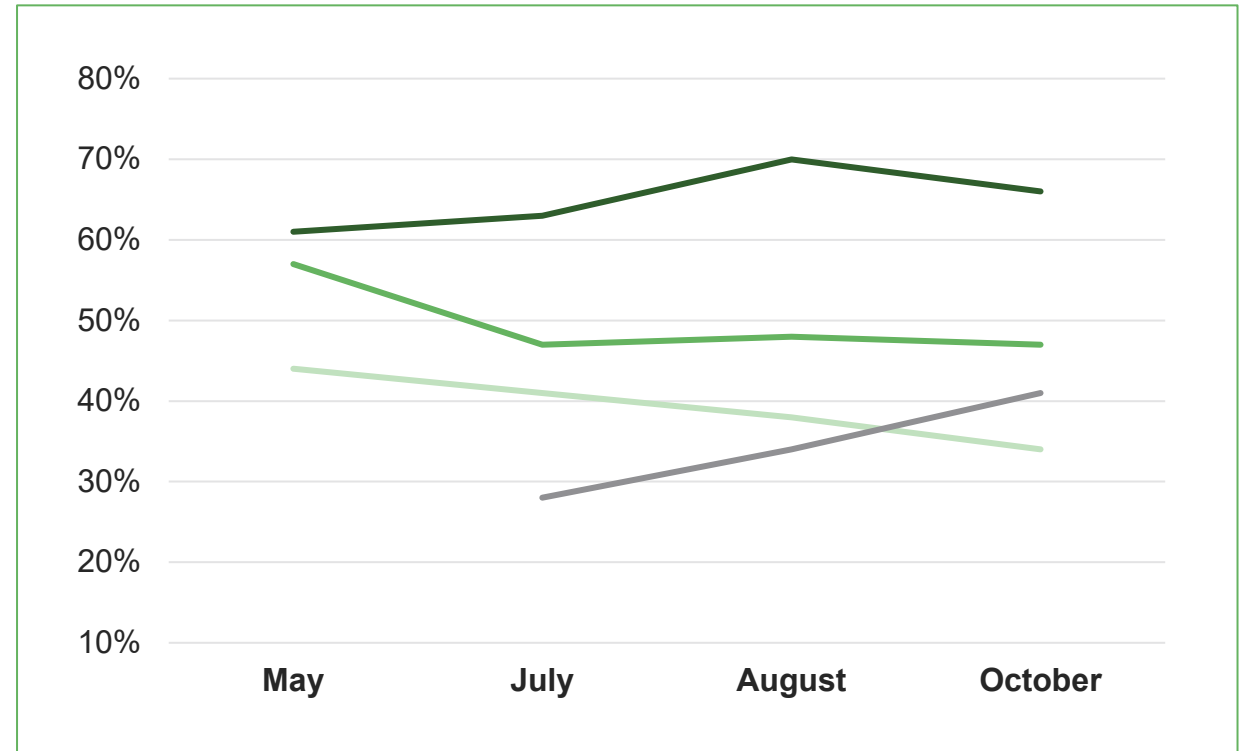
**65%** of female respondents currently working at home would like to work from home four or more days per week in the future.

EMPLOYED ADULTS TELEWORKING ALL OR PART-TIME BY DEMOGRAPHICS



# Teleworking Likely To Continue Well Into 2021

- 1 Employed adults currently working only at home
- 2 Teleworkers who want to continue working from home 4+ days / week
- 3 Employers of current teleworkers who are likely to continue to allow teleworking
- 4 Teleworkers who expect to return to an office 3+ months from now





## **Summary Observations & Data Applications**

# Summary Observations

- Though this data is different than travel data acquired through passive or other diary survey methods, the findings indicate how travel may change in the future based on current perceptions and behaviors.
- Active and non-shared modes have fared far better than other shared modes. This trend may or may not continue as travel returns to a steady state.
- Teleworking (current and future) varies significantly by demographics and those have continued teleworking into the fall expect to return to offices increasingly further into the future.
- The average U.S. resident is wary of travel, even with an available vaccine. Future surveys may indicate how vaccine use vs. vaccine availability will change travel perceptions. In the near term, other measures (like mask wearing) will remain key to travel resumption.



# Data Applications

- Informing future plans for travel data collection.
- Informing regional policies and priorities based on attitudes and perceptions.
- Indicating trends that may be more (or less) permanent -- e.g., will teleworking remain at high levels?
- Indicating how vaccine availability and usage will impact travel mode resumption.
- Underscoring that the future “typical” may be different than the pre-COVID-19 “typical.”





**Q&A**





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