



Assessing Future Travel Behaviours

Journey4 in partnership with The Buzz

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Introduction

The Coronavirus pandemic has forced companies and their employees to operate differently under strict lockdown measures and after more than 15 weeks operating under these unprecedented conditions, UK businesses have learnt to adapt and change their business models.

These changes, and the response of individuals to the pandemic, will inevitably impact travel behaviour and journeys to and from work in particular for some time to come. As businesses prepare for a relaxation in lockdown restrictions and consider new ways of managing the process of work, now is the time to engage businesses and employees to understand their views of public transport as they are actively planning a return to work. In particular, the level of confidence felt by the travelling public as working life returns will be a key variable to understand and track over time.

Journey4 and The Buzzz have worked together to develop an employee survey to understand likely user behaviour and confidence in public transport in the short-term, (0-6 months) and responses to a couple of likely future scenarios over a 6 to 12-month horizon.

This survey, which will be of value to commissioners and operators of public transport services, adopts a 'wisdom of crowds' approach to provide a quick, cost-effective alternative to a full user survey with a similar degree of confidence in the findings. The survey could be easily repeated after 6 months to assess further likely changes in behaviour.

Context

The COVID-19 pandemic has seen many organisations embrace changes at speed, including the large-scale dispersal of workforces and teams operating from home locations during the lockdown period. Many social commentators and economists believe that this situation has simply brought forward several forces which were gaining traction and that the ability for many businesses to operate successfully under lockdown has underlined the potential benefits of home working to business owners and the advantages it can also bring for employees.

However, plans made under the duress of reacting to Government policy at speed do not necessarily lead to an optimum solution and we need to be mindful of the current context when assessing initial reactions to it. People reacting to surveys during the earliest 'honeymoon' period of working from home may well have changed their views by now, as the latest data from YouGov illustrates in terms of the potential scale of impacts on working from home and business-related travel, (see following page).

This data shows the measures the public admit to taking to protect themselves in Week 7 v Week 1 of the lockdown. Avoidance of travel has risen to the number 3 ranked precaution behind the avoidance of public places and improved personal hygiene. An indication of the reticence to travel and specifically through transport hubs has clearly been set and the Government's policy of recommending people avoid public transport where possible will only serve to increase this reticence.

The next chart from the week of 23 April shows reported changes to lifestyle as a result of Coronavirus, in which 25% of people say they will work from home more and 28% will modify the amount of travel they do for business.

Social distancing is now the number one measure the public is taking to protect themselves from the virus

Ranking of measures taken	Wave 1 12-Mar	Wave 7 23-Apr
1	Improve personal hygiene (e.g. washing hands)	Avoid crowded public places
2	Refrain from touching objects in public (e.g. door handle, lift buttons)	Improve personal hygiene (e.g. washing hands)
3	Avoid contact with people who have/ seem to have a flu	Avoid travelling

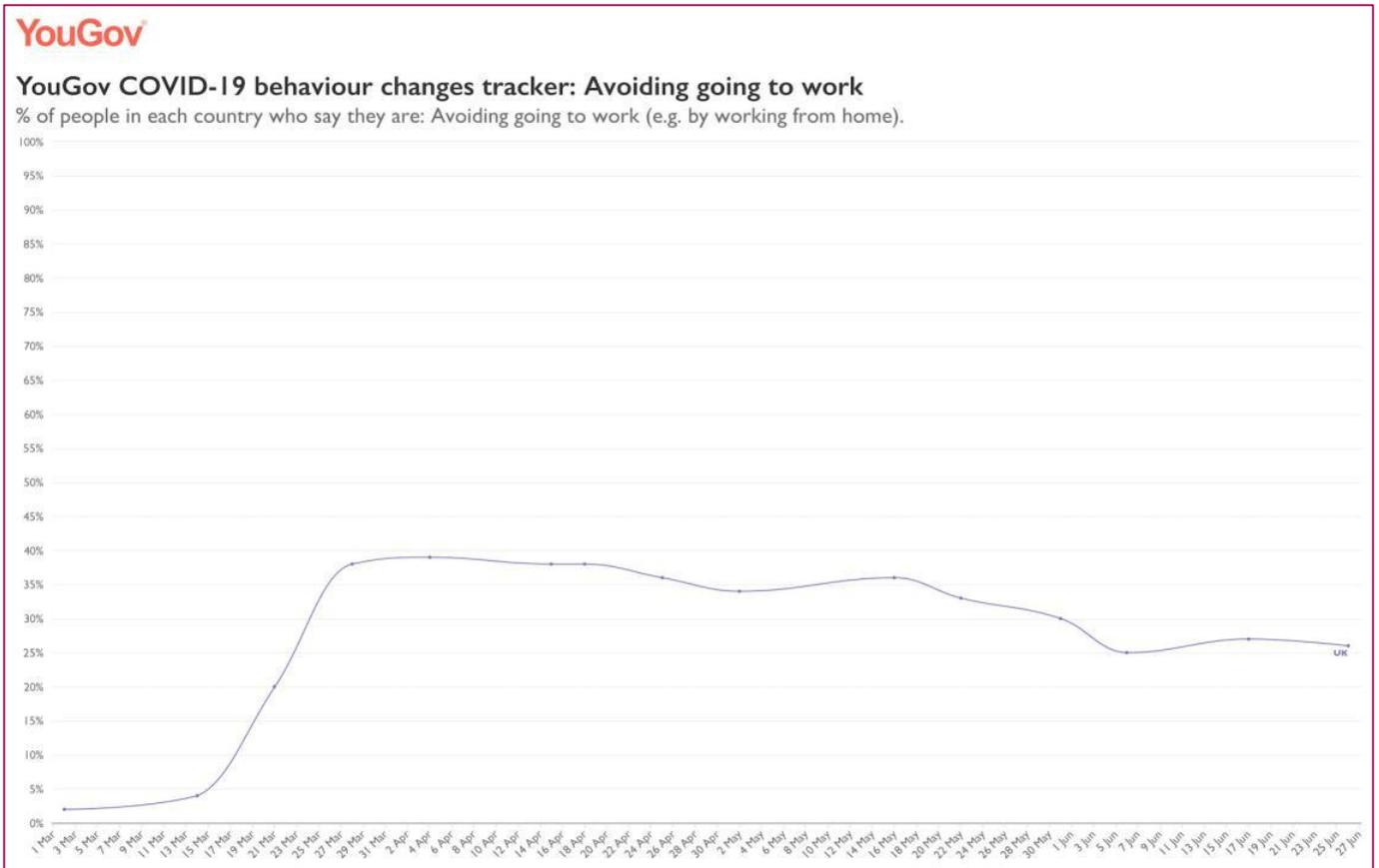
The biggest lifestyle change Brits plan to continue is to support local businesses

% Who Agree They Changed Their Lifestyle...



Whilst these changes are relatively low ranking compared to other lifestyle changes, these are still significant numbers and could have a noticeable impact on future travel behaviour.

The latest tracked data from You Gov shows that in late June the proportions still avoiding going to work by working from home in the UK were still around 1 in 4 (26%) – in late April this figure was tracked at 36%.



As we have seen, there are already clear indicators that travel behaviours, of commuters in particular, will change significantly in the short-term and it is not yet clear how long these changes will last.

Understanding these changes in behaviour and tracking them over the coming year to eighteen months will be essential for commissioners and operators of public transport services as they seek to deliver services that are perceived as safe to rebuild public confidence.

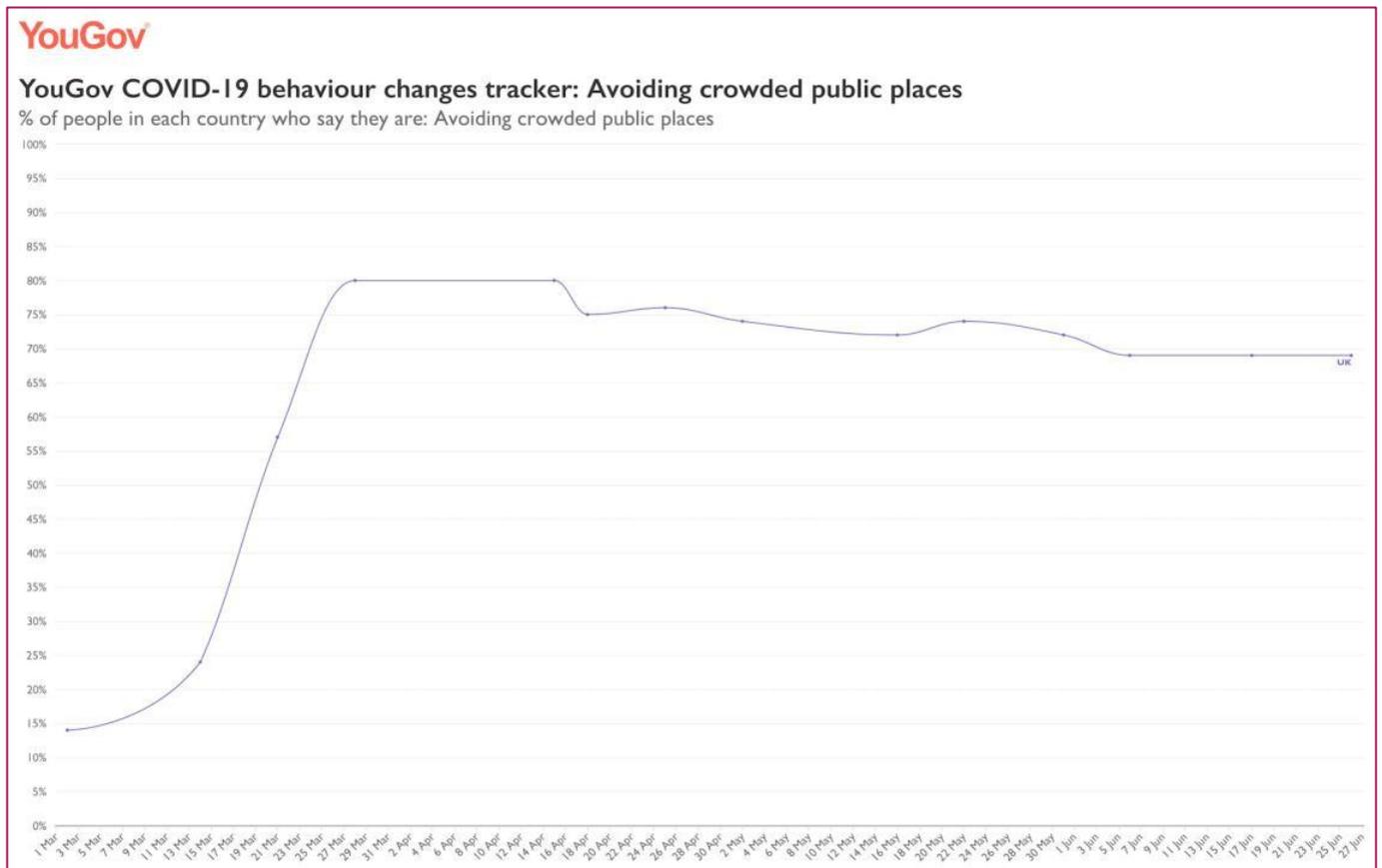
Timing

Whilst we are still in a period of uncertainty around public health, the Government is under pressure to restart the economy and is now starting to relax the restrictions we have all been operating under. From July 2020 many businesses are now able to trade, although workers are encouraged to remain working at home where possible. However, some businesses will need their employees to travel to their place of work and will encourage them to do so, with Government policy currently recommending walking and cycling where possible and avoiding public transport.

This is now a real choice that commuters and business travellers need to make and for many individuals who don't have other alternatives available, there will be a balance to be struck between the risk of travelling back to work using the public transport modes they did before and a desire to return to work with their colleagues.

We believe that is essential that public transport commissioners and operators gain a good understanding of these dynamics as soon as possible so that they know what to expect and how to rebuild confidence in public transport services. We also believe that now is the right time to ask commuters and business travellers how they are likely to behave, as the process of returning to work is real and has begun.

We can see from the chart below that confidence, particularly in avoiding crowded public places, is low with 69% saying they would avoid crowded places.



Approach

Journey4 and The Buzzz have developed an approach to surveying commuters and business travellers which is based on an adapted version of a 'Wisdom of Crowds' research methodology. This is based on the idea that large groups of people are collectively smarter than individual experts. For crowds to be wise, they must be characterized by a diversity of opinion and each person's opinion should be independent of those around him or her.

Our adaptation is that people with some knowledge of the problem or question being posed need to be active observers and have some basis for making an estimate. The principles required to make such an approach valid are:

- The crowd should be able to have a diversity of opinions.
- One person's opinion should remain independent of those around them (and should not be influenced by anyone else).
- Anyone taking part in the crowd should be able to make their own opinion based on their individual knowledge.
- The crowd should be able to aggregate individual opinions into one collective decision.

So, at a time when the UK economy is in the process of restarting, we believe an approach which asks business team leaders about the behaviour of their teams when it comes to returning to work is a more accurate way to understand the impact on travel behaviour than a large sample of the travelling public.

We propose to assess a representative sample of types, sizes and characteristics of businesses going back to work and ask people in those businesses responsible for a team of people to answer some simple questions such as:

- How many people are employed at the location where you are based?
- How many people in the entire organisation in the UK?
- How many people / what percentage of the workforce were furloughed?
- How many people were working remotely from the location where they are based?
- How many people / what percentage of the workforce does the company plan to bring back to work initially at your site/location?
- How many people do you have in your team?
- How many of your team use public transport to get to and from work each day?
- How many / what percentage of those do you believe will stop using public transport to get to and from work?
- How many of your team used to travel by public transport for business reasons? How frequently?
- What reductions do you estimate will there be for both the number of people travelling for business and the frequency of business travel?
- What do you estimate will be the fall in demand for public transport over the UK as a whole?
 - In Scenario 1 – lockdown restrictions are fully relaxed, (in 6 months)
 - Scenario 2 – after a Coronavirus vaccine is available, (in 12 months)

- How confident do you believe your team would be in public transport operator's ability to manage the risk of COVID19? (5 point scale)
- Which factors will be most important in rebuilding future public transport use? (ranking question)
 - The emphasis on public safety
 - The drive to get the economy working quickly again
 - The need for people to enjoy social activity again
 - The need to ensure maximum use of environmentally friendly modes of transport

With appropriate timing and a targeted audience, we are confident we have an approach which will provide realistic estimates of travel behaviour in the immediate future, and which can be used to track changes in behaviour on an ongoing basis as working practices are loosened, by applying the Wisdom of Crowds aggregated analysis.

Implementation

Typically, the survey will involve a diverse sample of 600 businesses, (with a target of 600 – 1,000 respondents) reflecting the mix of businesses in the area being considered, (i.e. a region or urban area) different size of business, (number of employees) activity and location. The survey is an online structured survey asked of people with management responsibility for a team of people.

An online survey reflecting the above questions and supplemented by a limited section of client-specific questions if needed, will be sent out to business user access panels. Only those with responsibility for a team of people will be screened into the survey and the length of interview should be no more than 10 minutes. The data collected will be rigorously checked for quality and analysed using specialised software to understand the impacts on public transport in terms of user behaviour. With a good sample size, we will be able to identify how confidence in public transport will be impacted and could be restored, which is likely to be different for different customer segments.

While an immediate assessment of behaviour is most important and likely to be more accurate by the proximity to restarting the economy and a return to work, we also believe the survey will be of greater value if the first wave is used as a benchmark and a subsequent wave in 3 or 6 months used to assess the speed of demand recovery.

About Journey4

Journey4 is a customer driven growth and business transformation consultancy that helps businesses achieve their potential, meet customers' expectations and gain an advantage over competitors. We engage key stakeholders and motivate people to implement effective change and deliver long-term profitable growth. Our unique growth and transformation framework, known as the 4E's, defines and guides the delivery of our services and underpins our operating philosophy.

For more information, visit www.journey4.co.uk or contact jonathan.booth@journey4.co.uk

About The Buzzz

The Buzzz is an insight consultancy spanning public service and commercial business. They believe the successful marketing of products and services requires an understanding of emotional context. Their approach to research focuses on 3 core areas to help make marketing or service delivery more effective, efficient and emotionally engaging: understanding your customers and users emotional responses to your product or service; establishing why and how far they trust your brand or organisation and finally understanding the nature of the relationship that develops between customers and you.

For more information, visit www.thebuzzz.co.uk or contact alan@thebuzzz.co.uk