Moving Beyond Covid-19

A collection of findings and insights from Nexus Covid-19 research

Introduction

This deck provides an overview of mobility and public transport use since lockdown supported by findings and insights from the various research activities undertaken by Nexus since the first lockdown in March 2020;

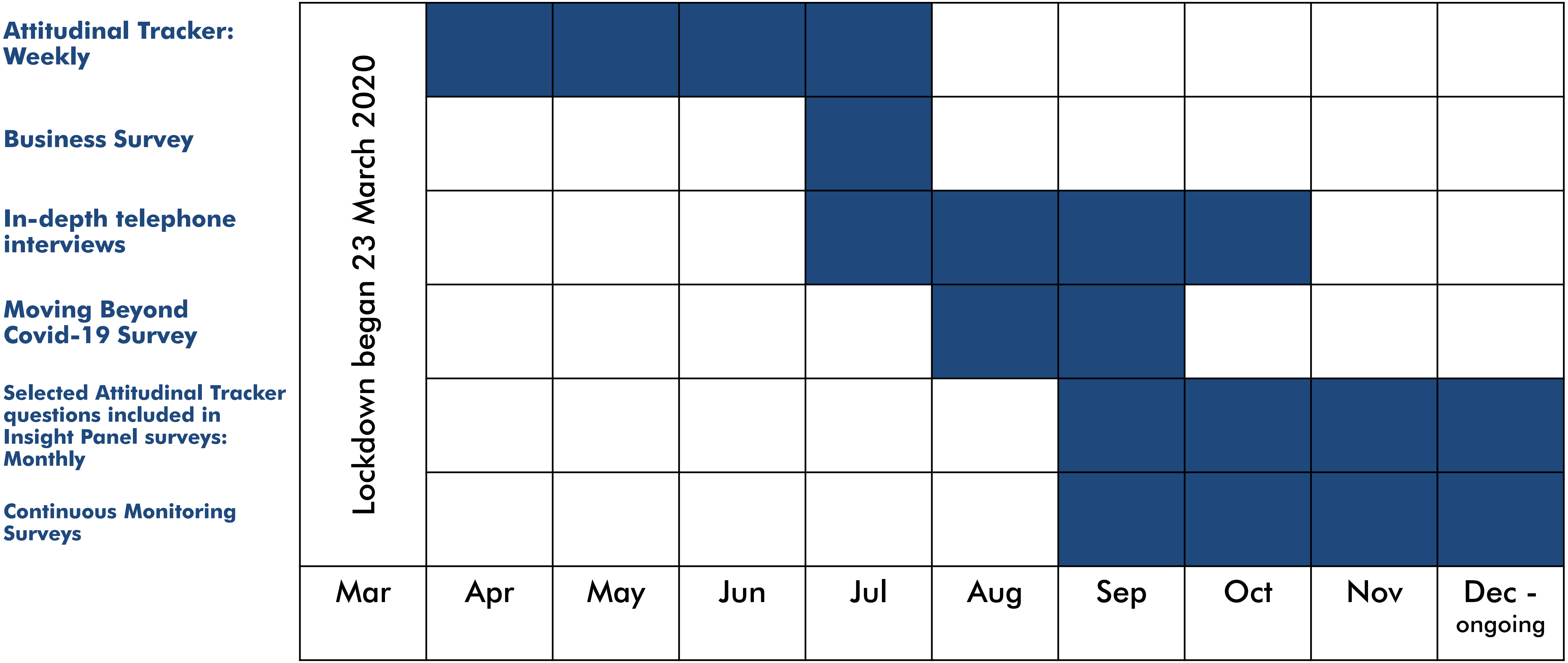
- Nexus research
- Background (mobility and transport use)
- Attitudinal changes
- Societal changes
- Looking ahead

Nexus Research

A timeline of research carried out during the Covid-19 pandemic

Nexus Research

Research relating to Covid-19 has been carried out by, or for, Nexus since lockdown with an unbroken chain of findings available through a range of online surveys and telephone interviews. The timeline below demonstrates how each component has contributed to Nexus Covid-19 research.



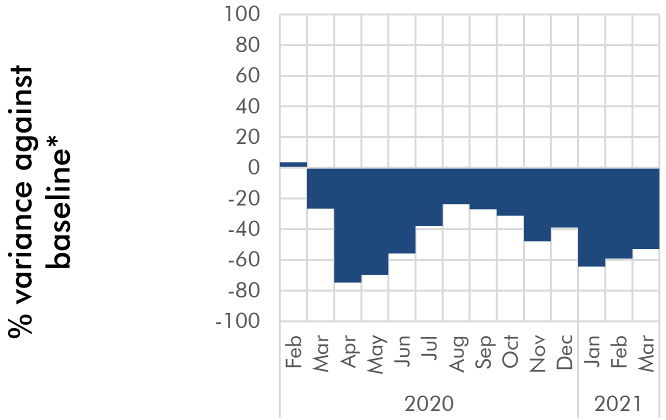
Mobility and transport use

A collection of statistics showing the impact of the pandemic on how people travel

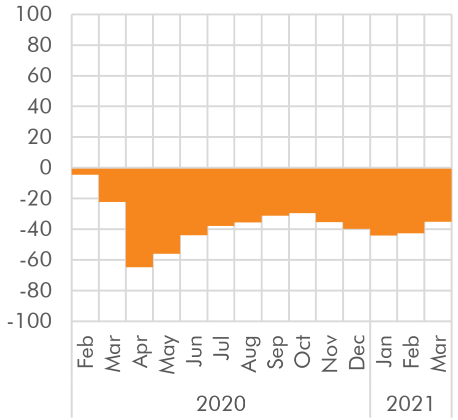
Average change in mobility

Google Mobility Report

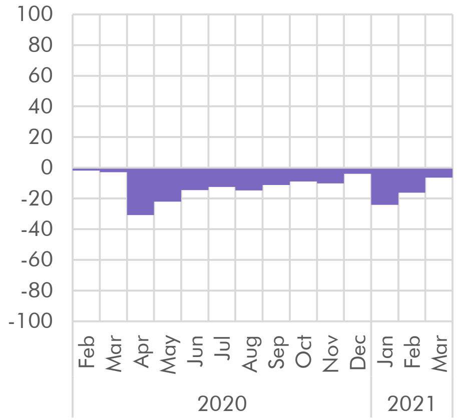
Retail and recreation



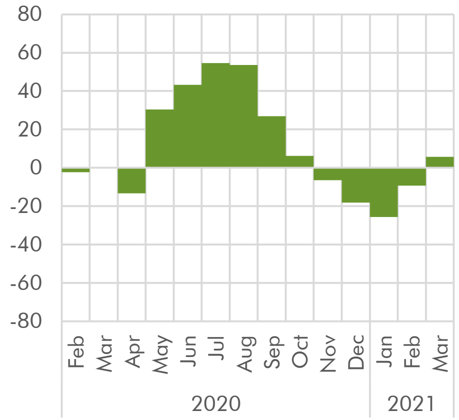
Workplaces



Supermarket and Pharmacy



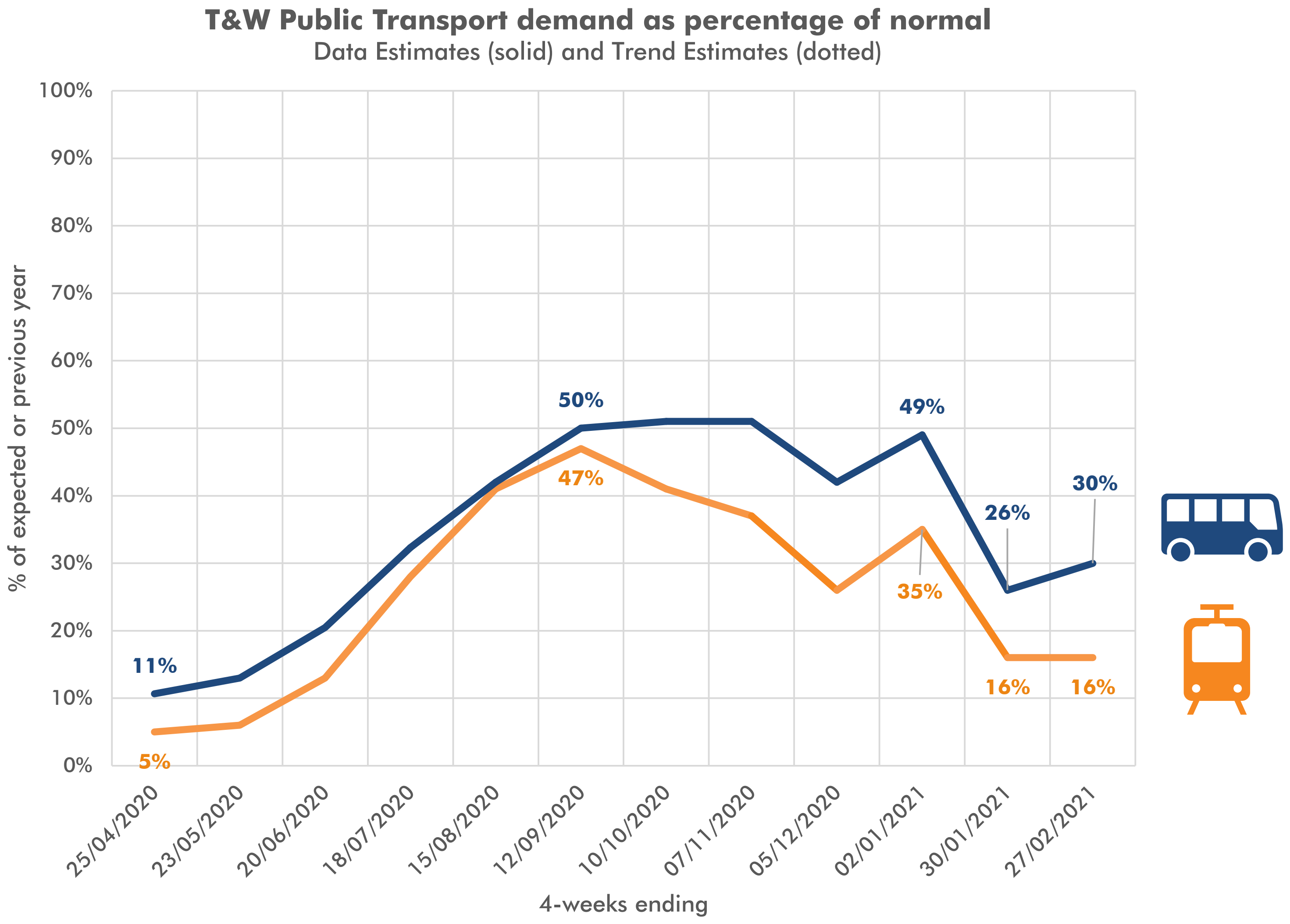
Parks



* 5 weeks during Jan/Feb 2020

Public Transport Demand

Percentage of normal



Metro patronage fell to just 5% of normal at the first lockdown, half the level seen on local bus services.

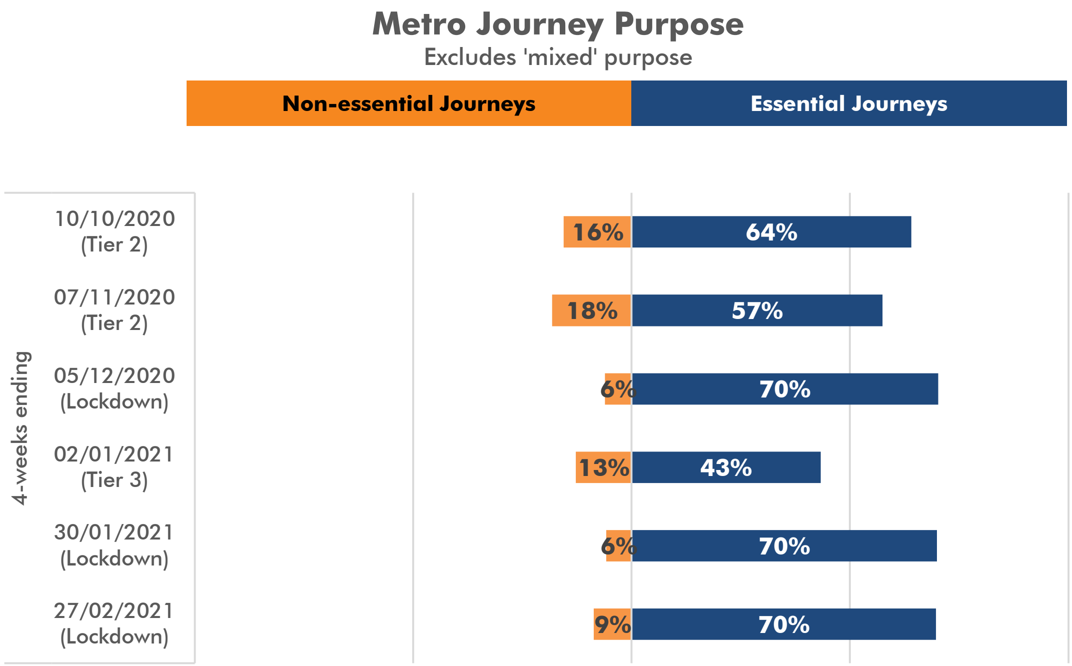
Prior to Covid-19, our User Profile research showed 30-35% of Metro passenger journeys could have been made by car compared to 10-15% of bus passenger journeys.

As restrictions were eased over the summer, public transport patronage recovered to around half of pre-Covid levels (and higher still towards the end of the 4-week period).

Since Autumn, various local restrictions and Tier levels followed which saw passenger demand respond accordingly.

Changes in Metro use

Reasons for travel (source: Nexus Continuous Monitoring)

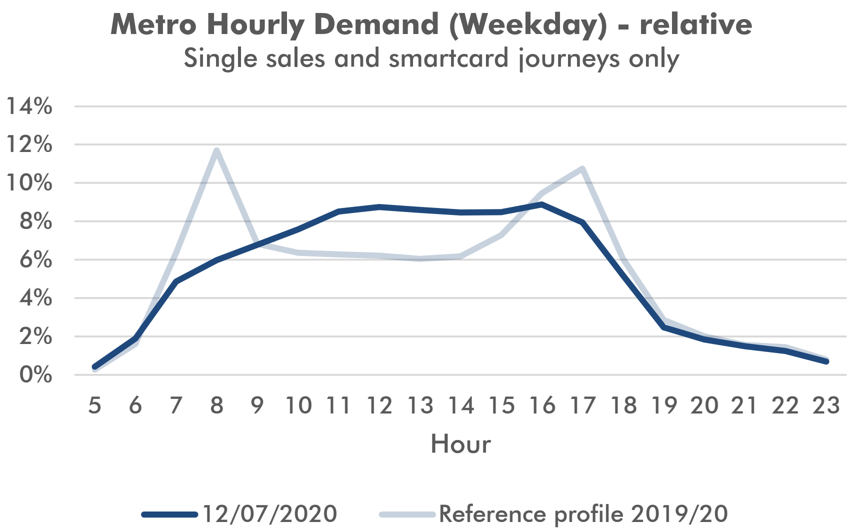


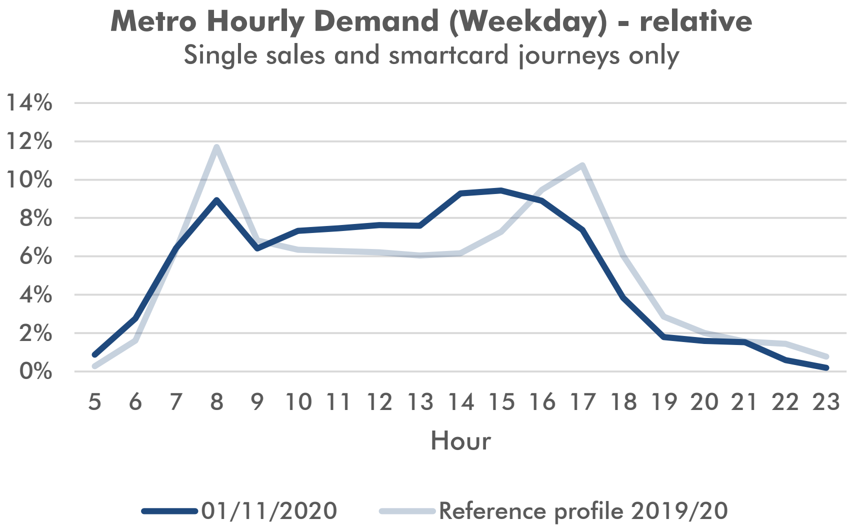
As the second lockdown took affect through November, the proportion of non-essential journeys fell to just 6%. The same period last year saw 20% of journeys classified as non-essential.

The 'mixed' category includes shopping and visiting friends/relatives. In the light of Covid-19 and those supporting vulnerable people by shopping on their behalf and visiting them, this category is excluded from the chart above.

Essential includes; work, education and personal business | Mixed includes; shopping, visiting friends & relatives | Non-essential includes; leisure, events

Times for travelling (weekday) (source: Nexus Sales)





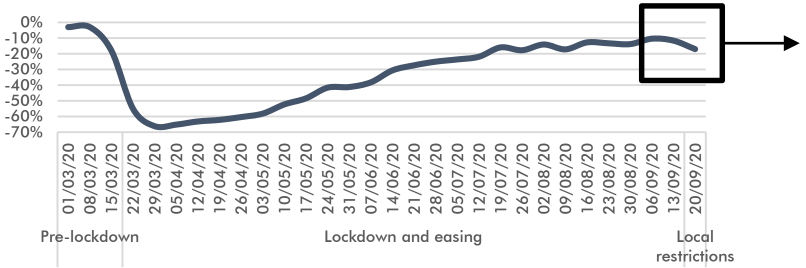
By mid July, the traditional morning and afternoon peaks observed on weekdays had been almost entirely replaced with a pattern of demand that saw the middle of the day carrying most journeys.

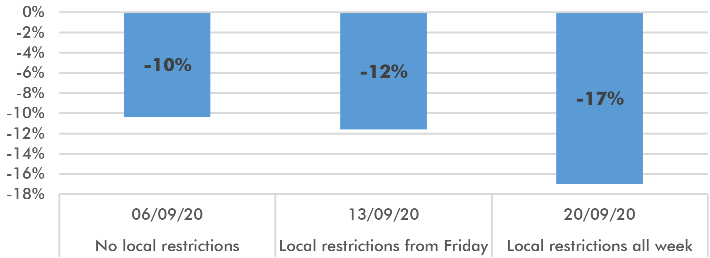
But by November, just prior to the second lockdown, we had moved towards the more traditional pattern albeit with an earlier shifted afternoon peak.

Transport use change following local Covid-19 restrictions from 18th September

Cars

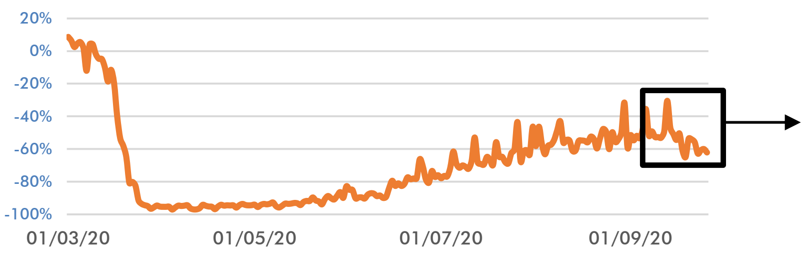
Traffic change on last year(source: UTMC)

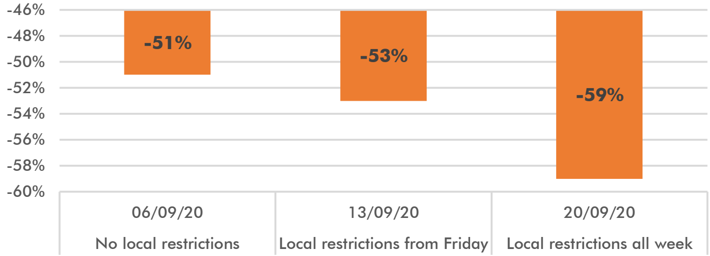




Public transport

Metro demand relative to normal (source: Nexus)





-52k journeys

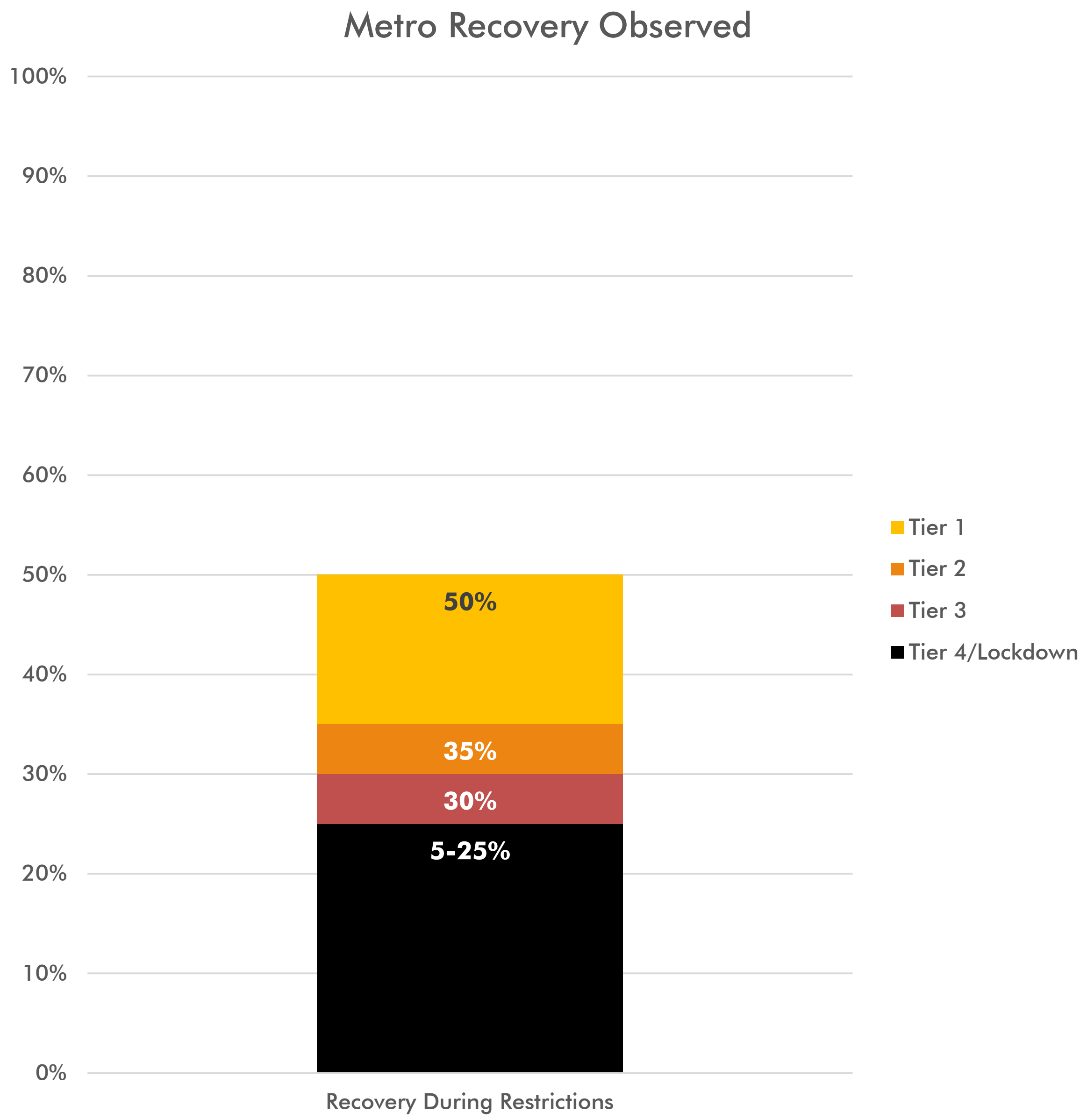
-17% change

Full week of restrictions compared to 2-weeks earlier

Prior to the Tier system, local restrictions introduced in mid-September saw a return of restricted activity. These restrictions were slightly stronger than the Tier 2 that replaced them with regards to rules on socialising at home and they introduced the closure of hospitality at 10pm and the requirement for table service only.

Immediately, travel demand on both roads and Metro reduced as the local population responded to these restrictions.

Recovery so far



Since the first lockdown in March, we have direct observations of the demand recovery in different states of restrictions.

The two lockdowns to date have been different in their scope with the November lockdown allowing much more activity than the original lockdown. We have observed that **lockdowns result in 5-25% of demand.**

Prior to local restrictions, the equivalent of **Tier 1, demand had increased to 50%** and was on an upward trajectory.

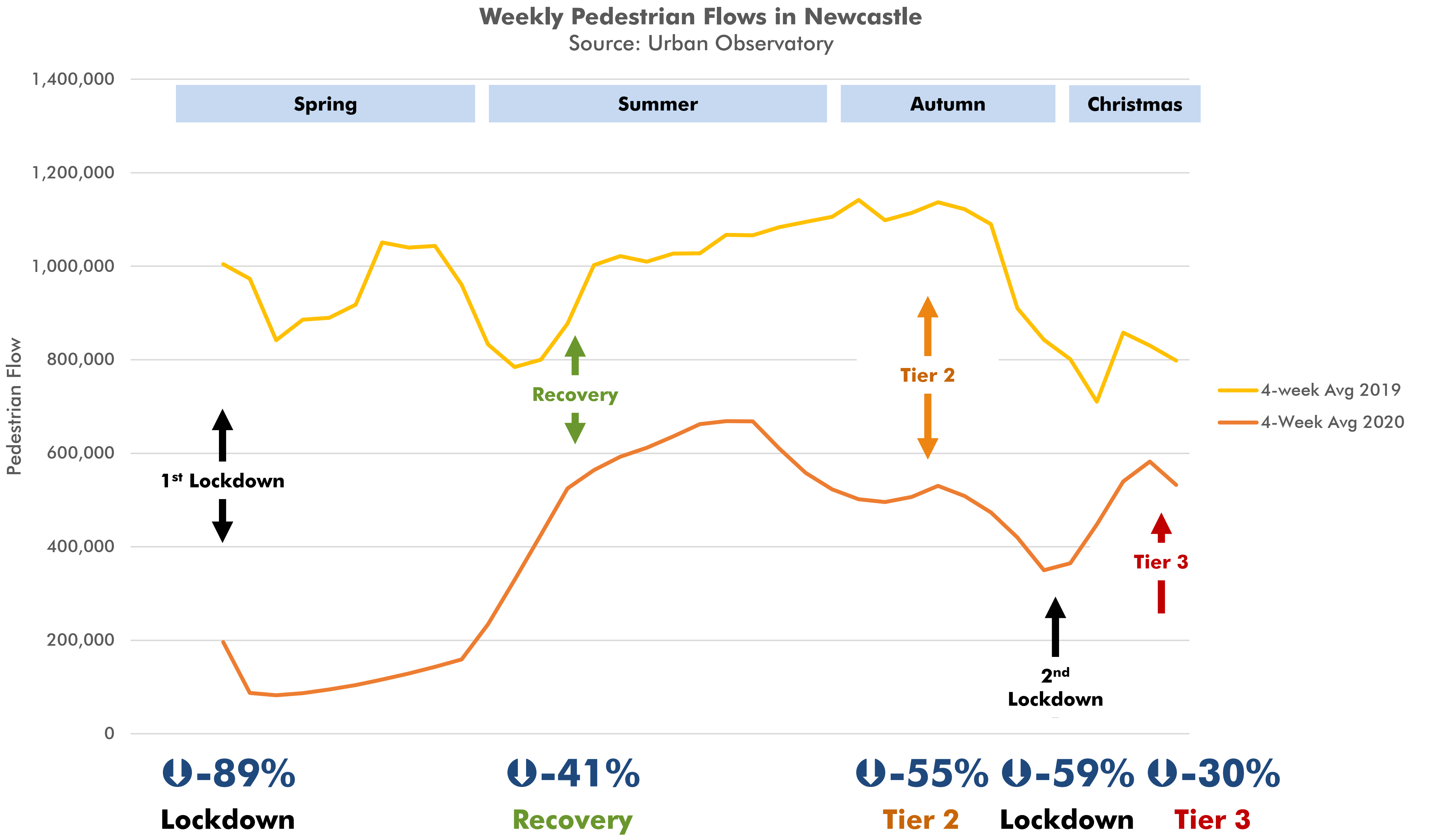
Local restrictions were subsumed into the subsequent tiered system at **Tier 2 where demand plateaued at 35%.**

We can assume Tier 3 would lie between lockdown and Tier 2. The Tier 3 status that began after the 2nd lockdown was artificially increased due to the Christmas period and saw demand around 35% of normal.

The area experienced Tier 4 restrictions for a only a few days before the 3rd national lockdown began in early January. Early indications are of demand around 15% of normal.

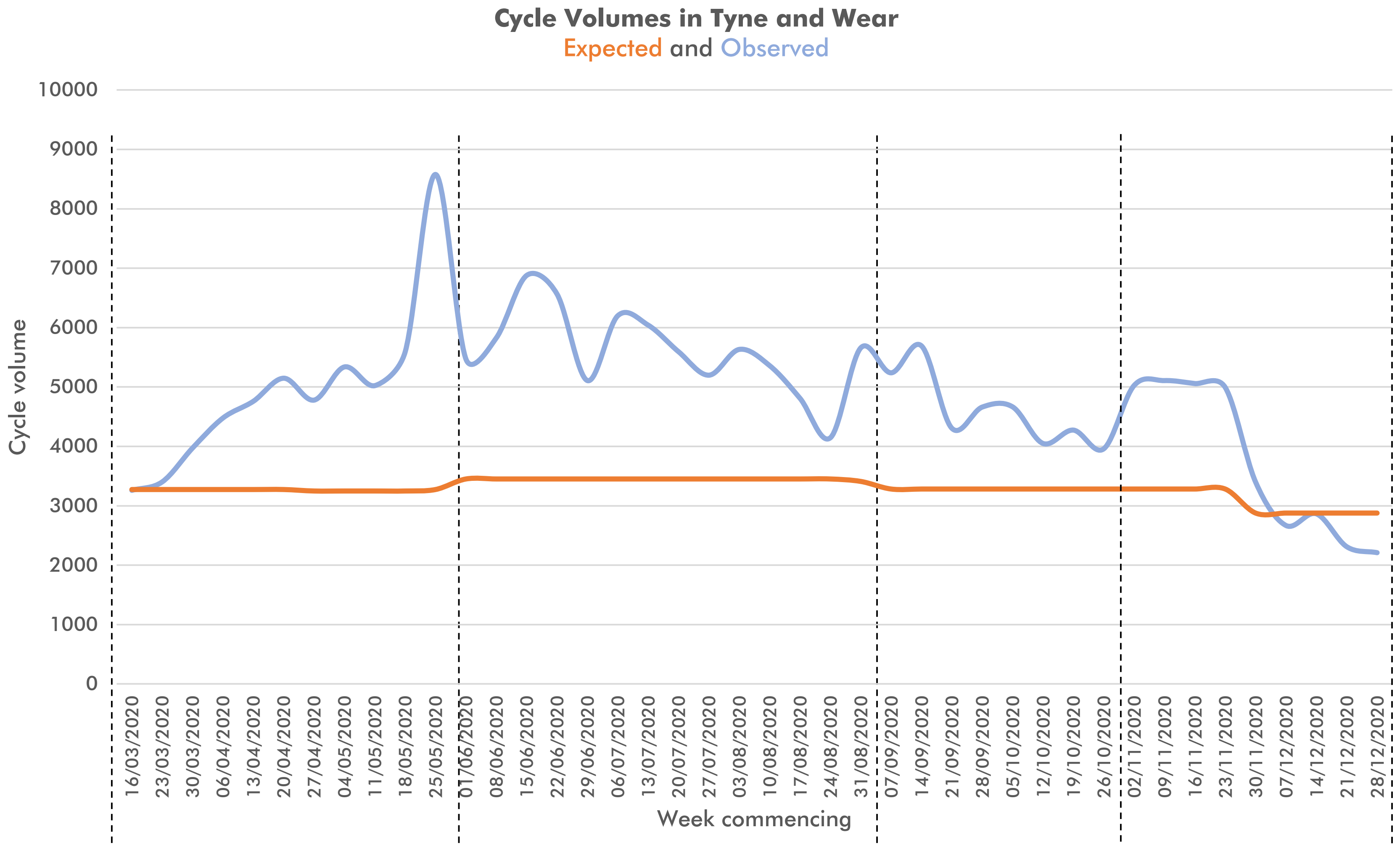
Pedestrian Flow in Newcastle

Source: Urban Observatory



Active Travel Use

Source: TADU



↑57% Mar to May

↑62% Jun to Aug

↑43% Sep to Oct

↑22% Nov to Dec

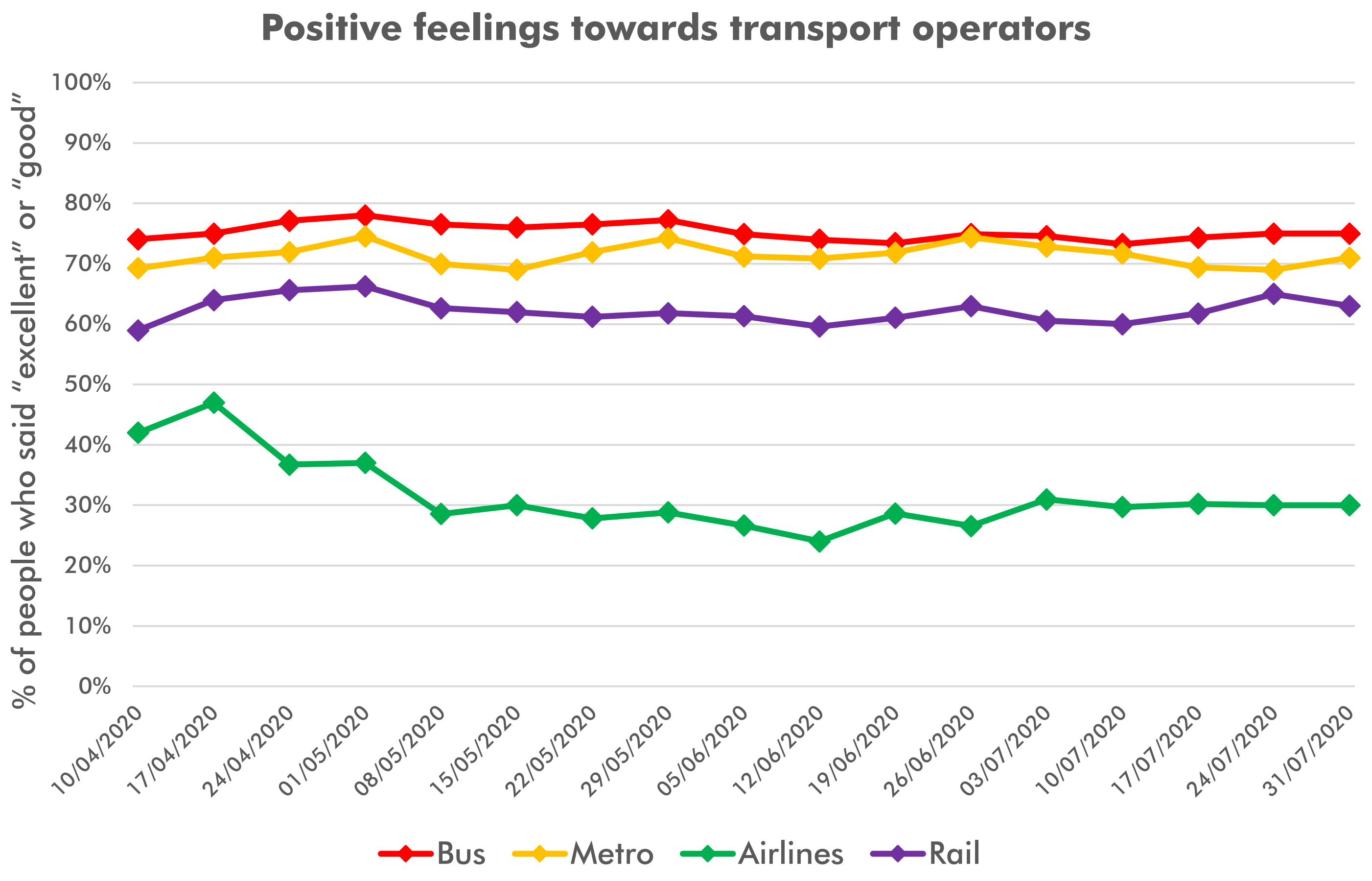
Attitudinal changes

A summary of findings from our 17-week Attitudinal Tracker from early in the pandemic

Full results from each wave of the tracker are available at www.nexus.org.uk/insight

Transport operators' handling of the pandemic

Source: Nexus Insight Panel, Covid-19 Attitudinal Tracker



During the 17 weeks of the attitudinal tracker, support for transport operators' handline of the pandemic was recorded.

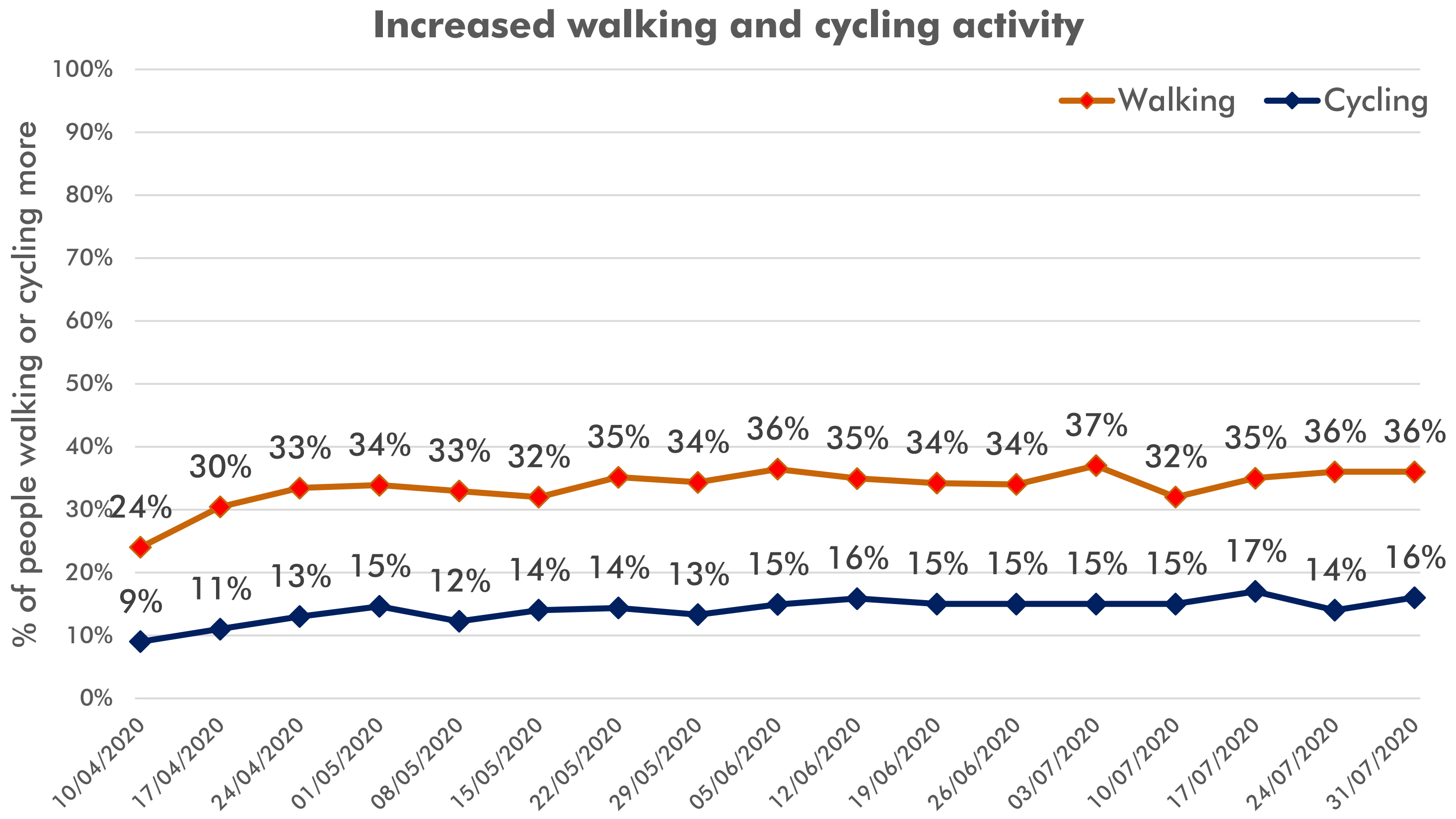
Airlines started from a low support base but fell considerably in the first months of the pandemic – holiday cancellations and delays receiving refunds were the key contributors to this. By the end of July, support was just 30%.

Local public transport operators saw higher levels of support

How do you think Bus/Metro/Airlines/Rail have responded to the pandemic? Base: All respondents (excludes don't knows)

Walking and Cycling

Source: Nexus



From the early days of lockdown, we saw increased levels of walking and cycling among respondents.

Throughout the 17 weeks the tracker was active, the levels of increased walking and cycling was consistent with just over 1 in 3 people walking more and 15% cycling more.

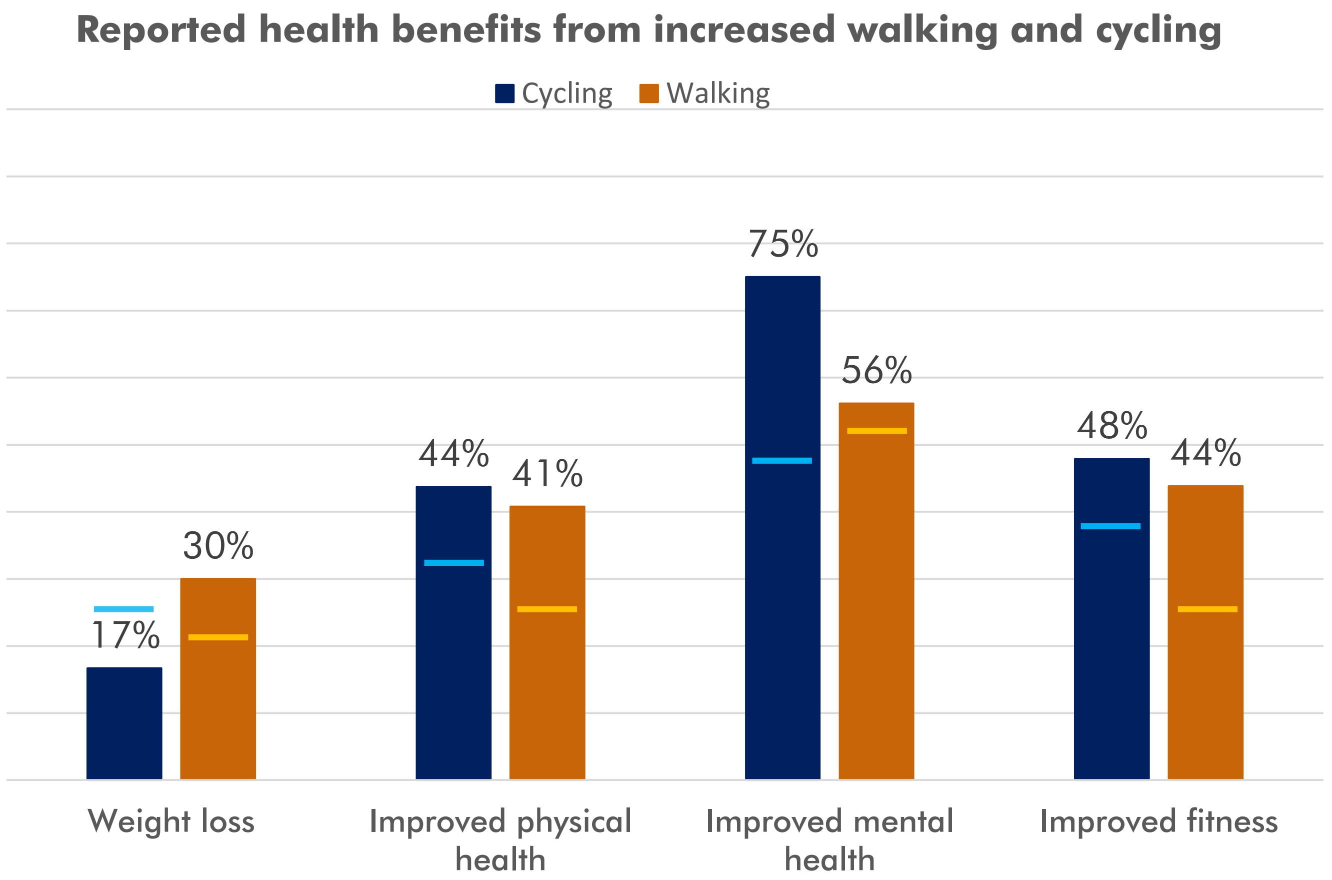
Much of this has become embedded behavioural change as the *Looking Ahead* section will show.

Walking and Cycling

Source: Nexus

Bar:
Week 8

Line:
Week 1

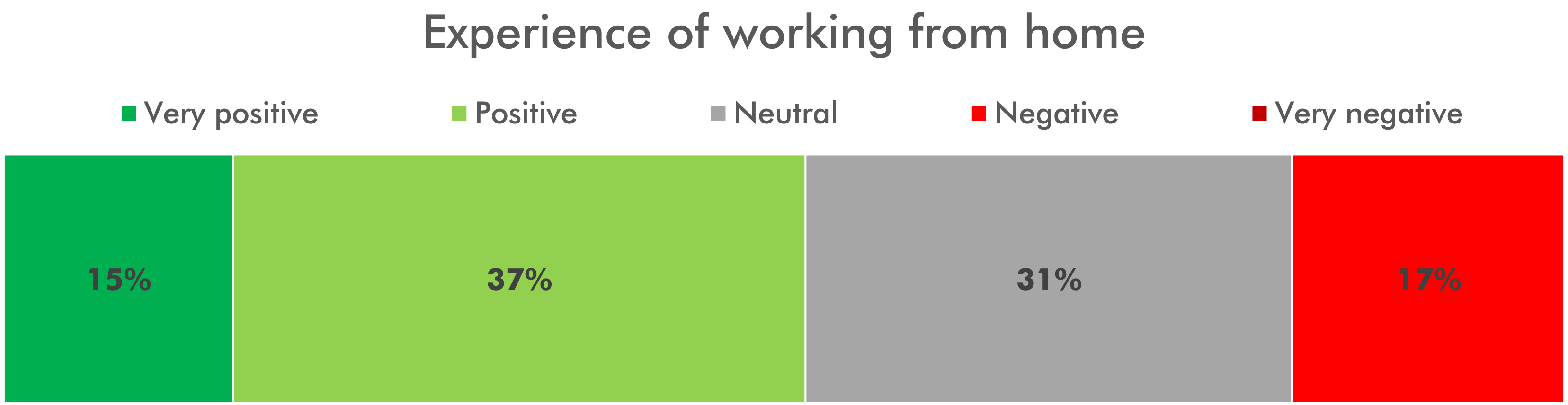


Perhaps the most positive finding from our tracker was the self-reported health benefits among those walking and cycling more.

With a significant proportion expecting to continue walking and cycling more in the future, this has long term benefits to public health.

Have you experienced any health benefits from walking or cycling more? Base: Respondents who said they are walking/cycling more (Walking n=130, Cycling n=48)

Embracing working from home
Source: Nexus



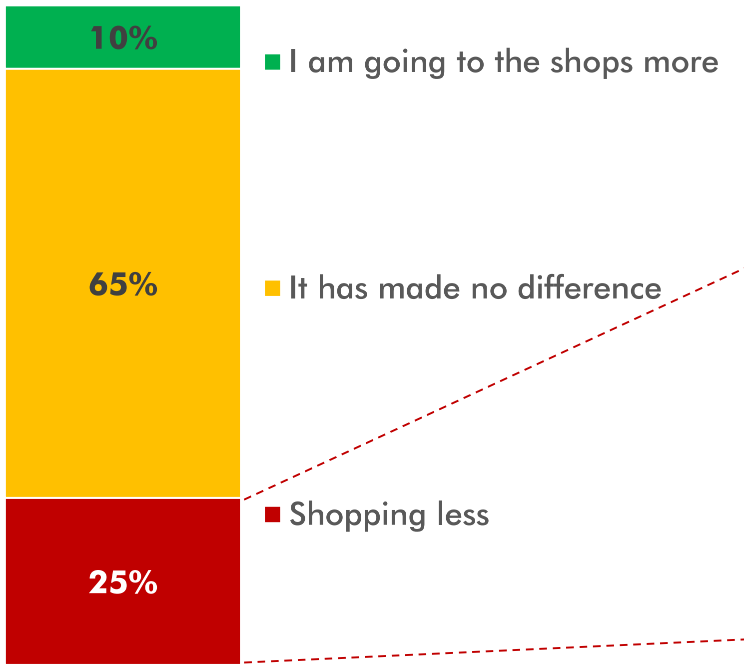
After 8 weeks of the first lockdown, the experience of working from home among those who previously didn't do this was very positive although was not universally welcomed. Overall more than half found the experience positive.

How have you found the experience of working from home?
Base: Respondents who are working from home that did not previously work from home n=119, Week 8 – 29th May 2020

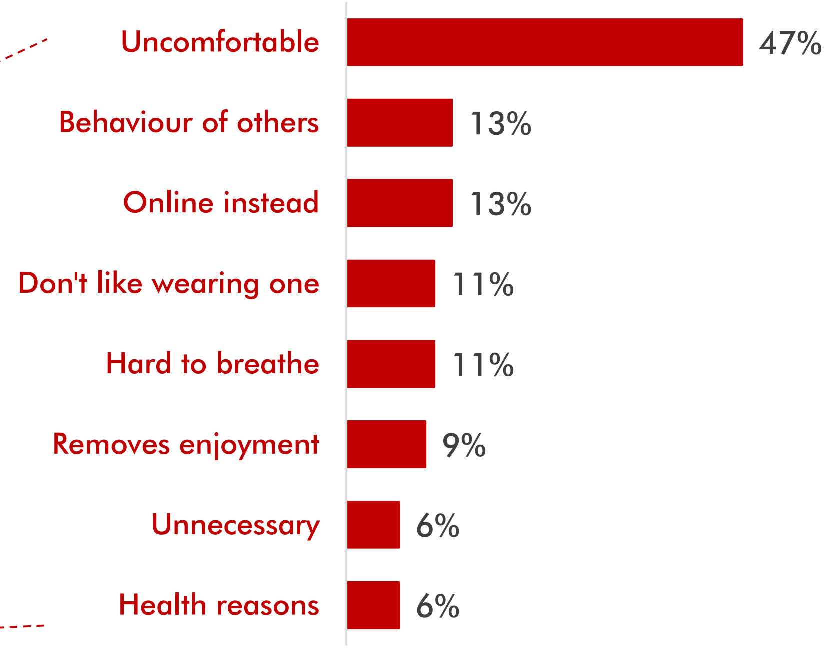
Early response to face coverings

Source: Nexus, July 2020

Impact of wearing face-coverings on shopping habits



Reasons face-coverings have made people shop less

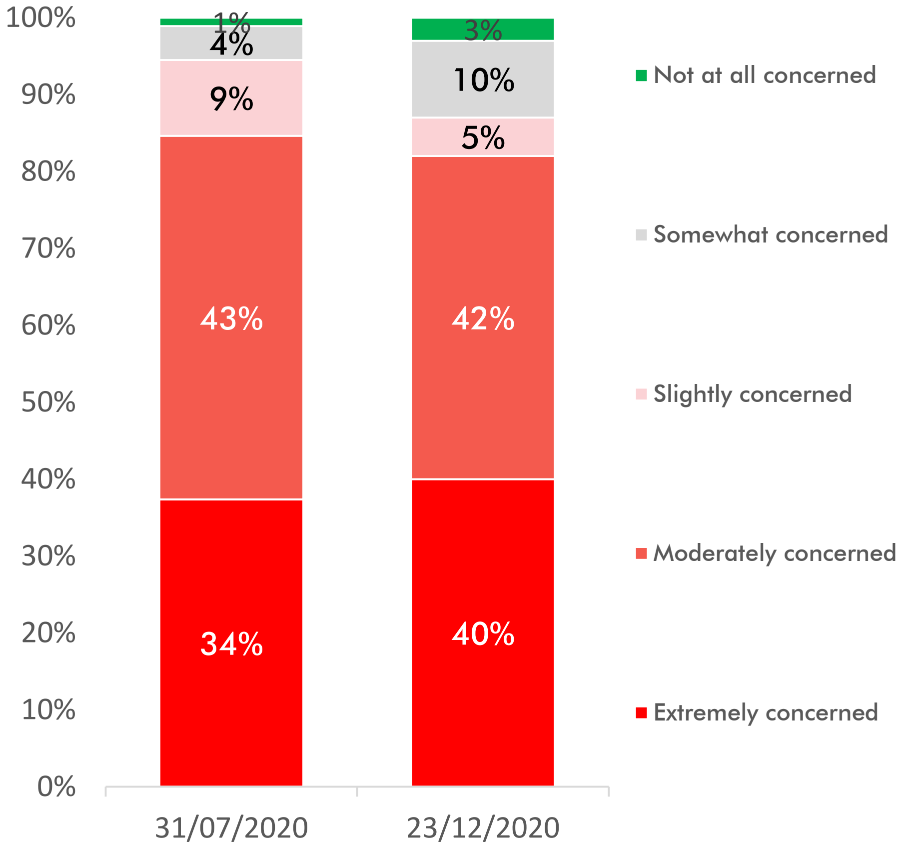


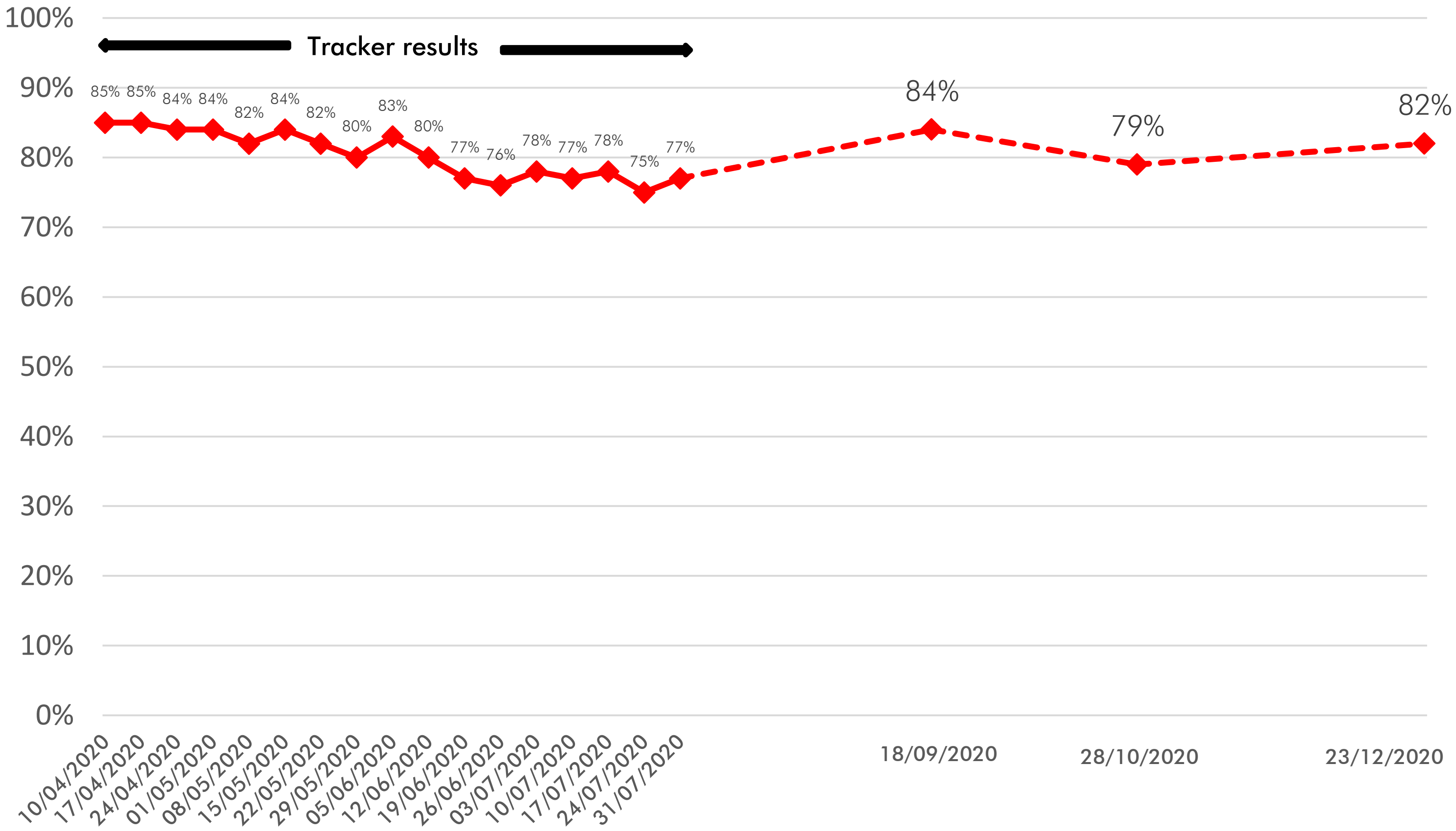
In July we covered the early response to face coverings. A quarter of respondents stated they were shopping less as a direct consequence of having to wear a face covering with discomfort being the primary driver.

How has wearing a face-covering in shops and supermarkets influenced how often you go shopping? Base: All respondents n=375
Please tell us why are you going to the shops less? Base: All respondents shopping less because of face-coverings=95

Levels of concern

Source: Nexus Insight Panel



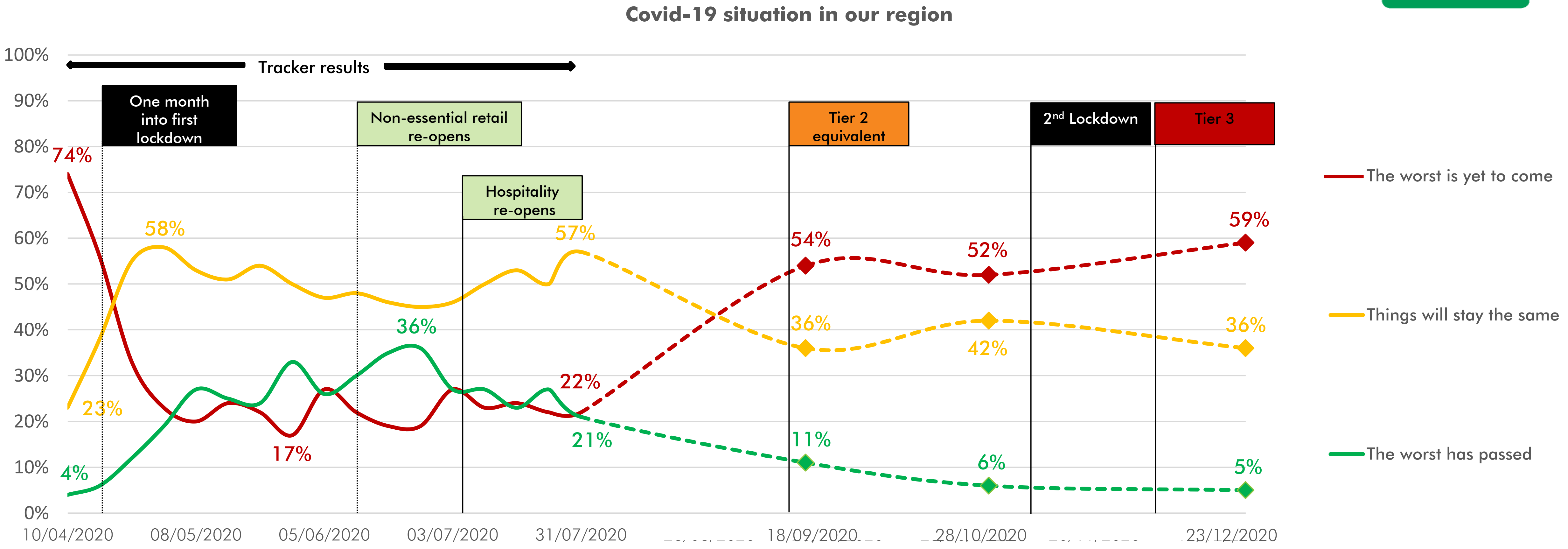


Throughout the pandemic, concern about Covid-19 has remained high among respondents. Even at the best time during the 17 week attitudinal tracker, 3 in 4 people were experiencing extreme or moderate levels of concern. Unsurprisingly, as additional restrictions were imposed by Christmas – including the creation of Tier 4 – concern had risen again to similar levels seen in March 2020.

How concerned are you about Covid-19?

Expectations of Covid-19 situation

Source: Nexus Insight Panel



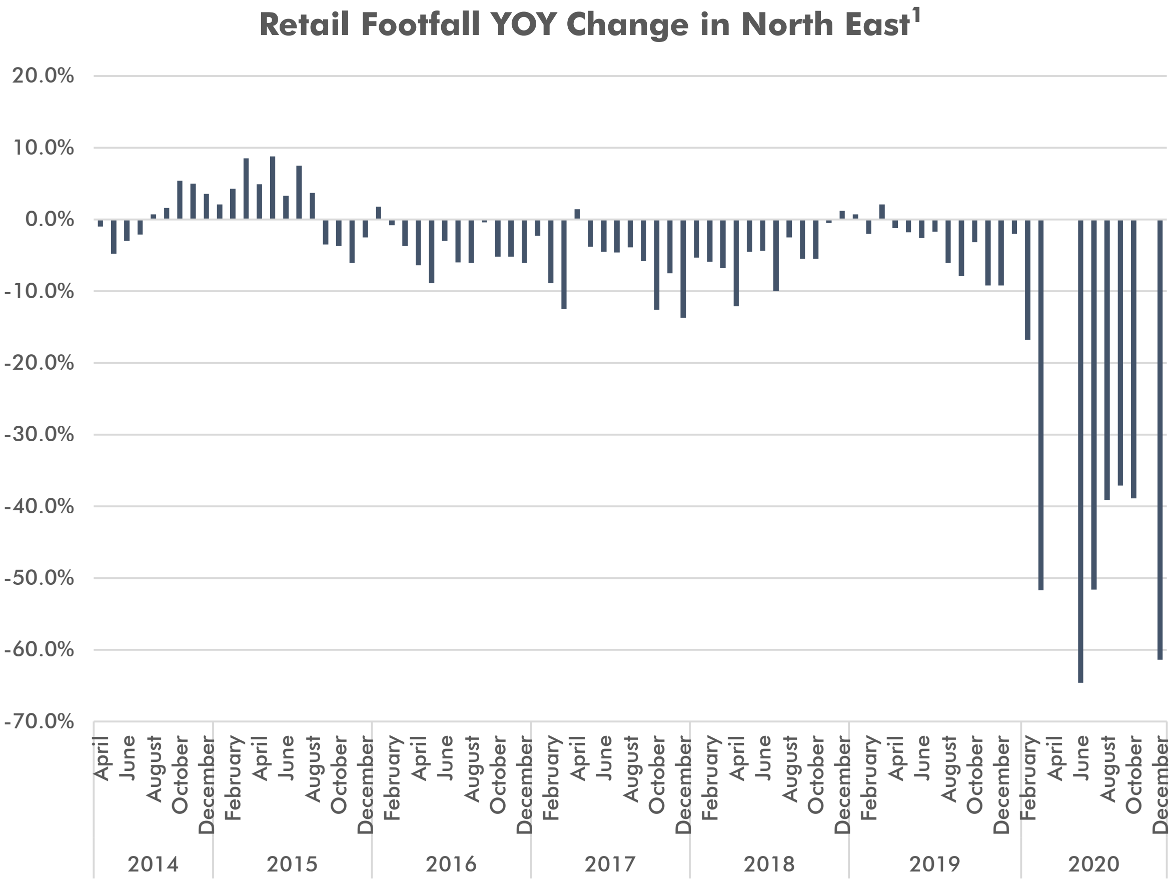
At the outset of the weekly Attitudinal Tracker, around 3 in 4 people believed the worst of the effects of the pandemic in our region were still to be felt. By the time summer arrived and the relaxation of restrictions that followed, we saw signs of optimism. Unfortunately this was temporary as Tier 2 equivalent restrictions were introduced in mid-September followed by a second lockdown in November which transitioned into Tier 3 restrictions. By Christmas, we saw the highest proportion believing the worst was still to come since the start of the pandemic. The impact of the 3rd national lockdown from January is not captured here.

Thinking about Covid-19 in our region and the way the situation is going to change over the next month, which of the following best describes your opinion?

Societal changes

A collection of statistics illustrating underlying pre-pandemic changes in society

Retail Footfall



Lockdown has come at a particularly challenging time for the high street. Retail footfall in the North East has been in decline since the end of 2015.

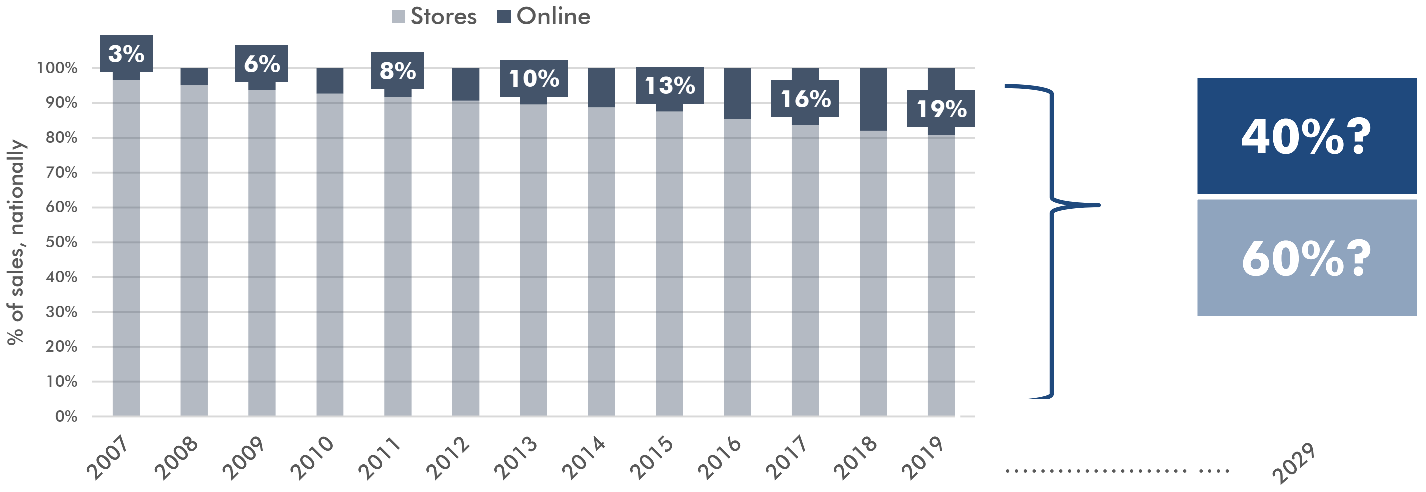
Research shows that one of the leading reasons for visiting the high street less is the lack of shops or shop closures[2].

This creates a causality spiral; as shops close, fewer people visit the high street making it less economically viable for remaining shops to trade.

[1] Ipsos UK Retail Traffic, North East
[2] Nexus Insight Panel, Retail Habits survey

Retail: from brick to click

Sales by location as a percentage of total retail[1]



Over the last decade, the market share of online retailing nationally increased from 6% to 19%. Had that trend continued, online retailing would have reached 40% by 2029.

In April, the first full month of lockdown, online market share reached 30% - 5 years earlier than the underlying trend. This fell back slightly to 27% during August.

Nexus research has consistently shown a high expectation among respondents that their physical retailing will reduce post-pandemic in favour of increased online use with ramifications on travel demand and local economies.

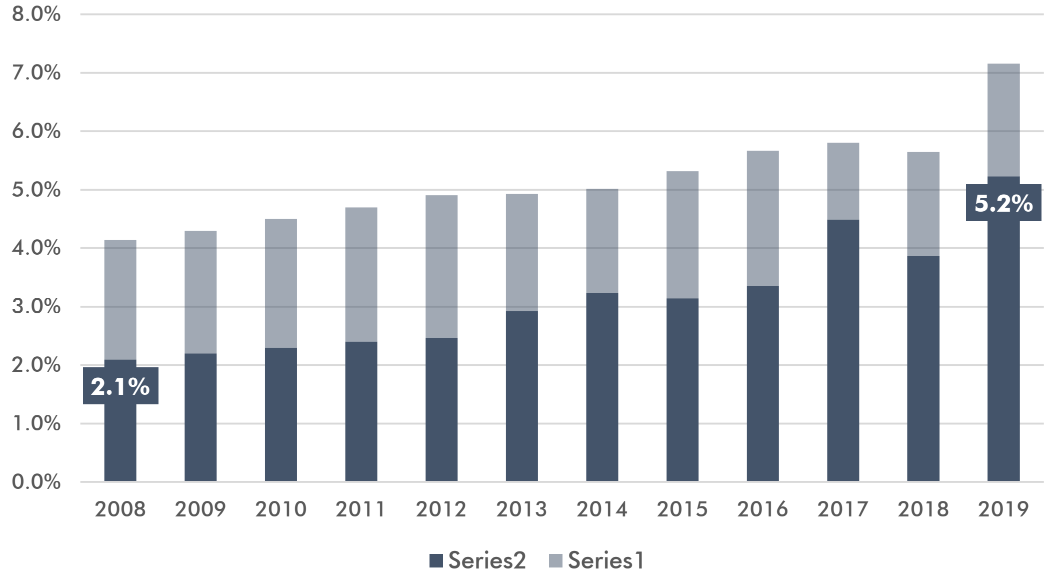
The **British Retail Consortium** predicted a 25% reduction in high street units by 2025.

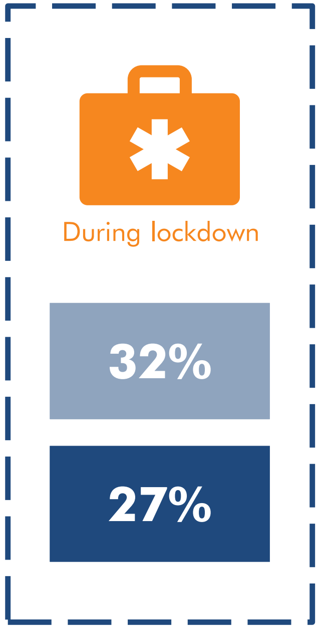
COVID-19 has accelerated this to within the next 1-2 years

[1] Office for National Statistics, Internet sales as percentage of total sales
[2] Office for National Statistics, Internet Access – Households and Individuals 2019
[3] Interview with BRC spokesperson on BBC Click
[4] Nexus Insight Panel, Attitudinal Tracker | Nexus Moving Beyond Covid survey

Working from home

Proportion of workers working from home[1]





Home working in the North East is rare with just over 5% working solely from home[1] in 2019, behind the rest of the UK on 7%.

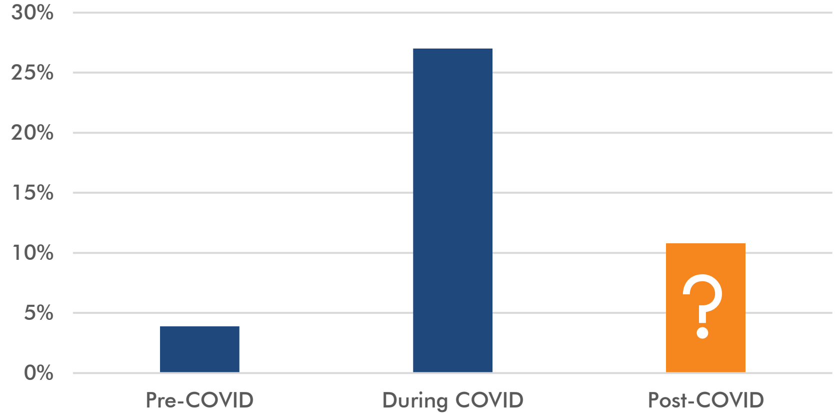
During the March lockdown we estimate 27%[2] of the local workforce were working from home, slightly behind the UK figure of 32%[3].

Post COVID-19 rates of working from home will fall back but certainly not to where they were.

In all likelihood we could see the rate double in a year as a result of the pandemic compared to the natural doubling over a decade – effectively leaping forward 15-20 years.

If the existing 27% continued working from home for 2 days a week it would amount to a working from home rate of just under 11%.

Where next?



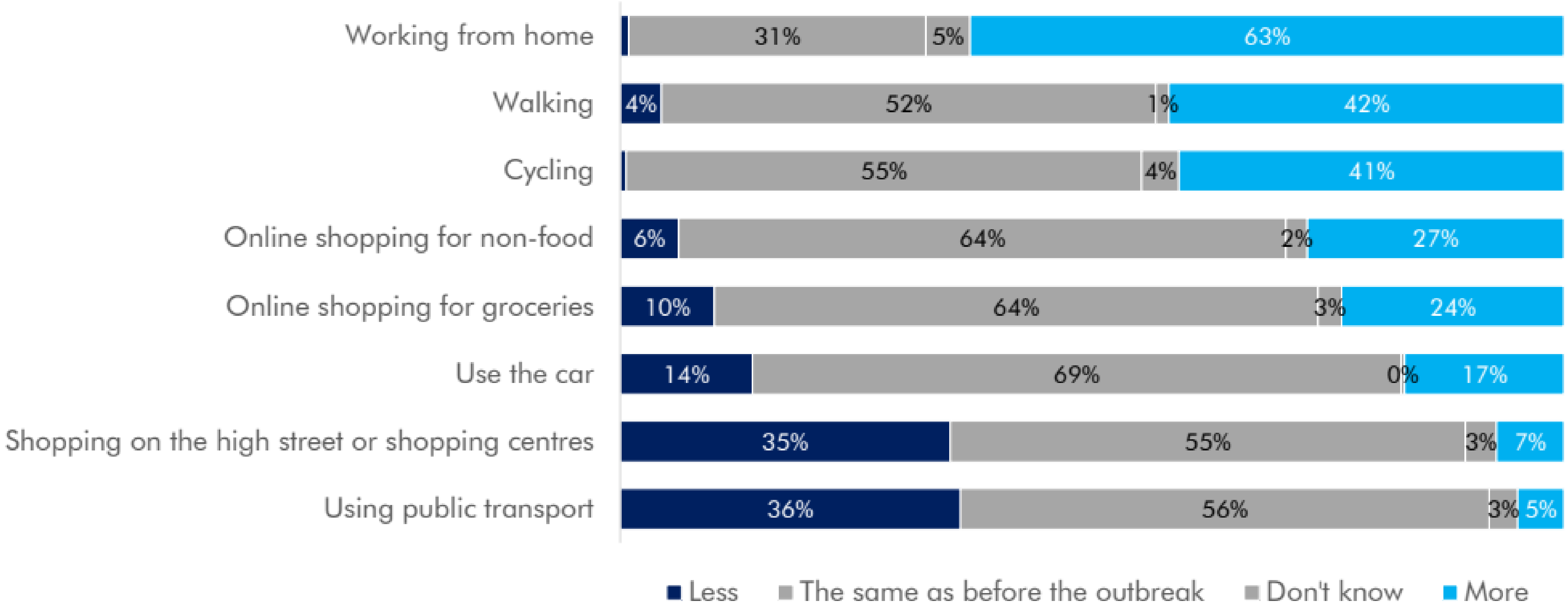
[1] Office for National Statistics, Labour Force Survey
[2] Nexus Insight Panel, COVID-19 Attitude Tracker
[3] Office for National Statistics, Opinions and Lifestyle Survey

Looking ahead

Highlighting some of the potential long lasting impacts of the pandemic

Expectations of post Covid-19 activity

Nexus Covid-19 Attitude Tracker Week 17 (end July 2020)



Expectations of post Covid-19 activity

Nexus *Moving Beyond Covid* Survey (September 2020)

After Covid-19

Since Covid-19	Increase	Stay the same	Reduce
Increased	7%	33%	11%
Stayed the same	5%	26%	2%
Reduced	11%	3%	1%

45% walking more after Covid compared to baseline

6% walking less after Covid compared to baseline

After Covid-19

Since Covid-19	Increase	Stay the same	Reduce
Increased	3%	12%	4%
Stayed the same	2%	9%	1%
Reduced	2%	1%	0%

17% cycling more after Covid compared to baseline

2% cycling less after Covid compared to baseline

65% of people don't cycle at all

As noted in the *Attitudinal Changes* section, increased walking and cycling was evident immediately within the first lockdown. In our *Moving Beyond Covid* survey in September 2020, we found embedded behavioural change in this regard.

Expectations of post Covid-19 activity

Nexus *Moving Beyond Covid* Survey (September 2020)

18% shopping on high street more

78% shopping on the high street less

4% shopping on high street the same

49% shopping online more

11% shopping online less

40% shopping online the same

27% use public transport less for work

Walking and cycling are not the only areas we're seeing potential embedded behavioural change. Expectations of retailing are of a significant shift towards online at the expense of physical shopping. We know many people have used, and relied, on online shopping for the first time as a result of the pandemic – many of whom are content to stay shopping this way.

A means to an end

Travel, regardless of the method, is largely a means to an end. There are six key determinants of travel on Metro;

Commuting	Leisure & Hospitality	Retail	Education	Socialising	Business
39%	27%	13%	10%	7%	1%

Changes to the drivers of demand on Metro

Highly likely to reduce

- Increased working from home
- Remote business meetings
- Move from 'Brick' to 'Click' retail

53% of pre-COVID demand

Possible to reduce

- Some businesses won't survive COVID-19 impacts
- But demand for travel could be maintained with remaining services

27% of pre-COVID demand

Less likely to reduce

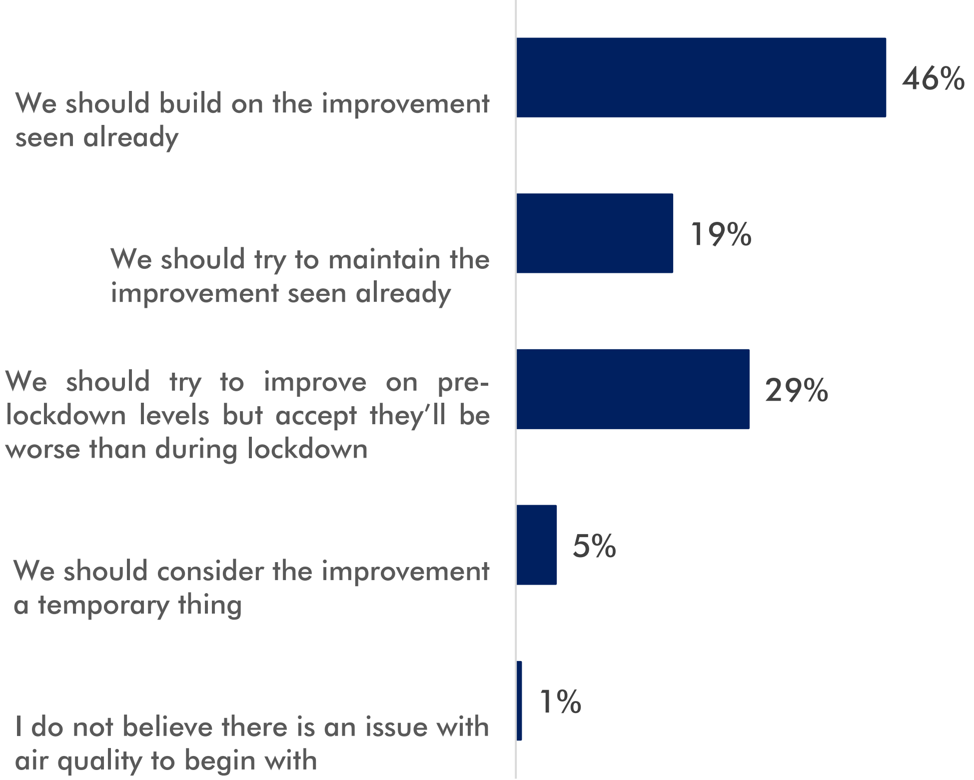
- Still some scope for education trips to be reduced – especially among university students
- Socialising likely to be the least affected

17% of pre-COVID demand

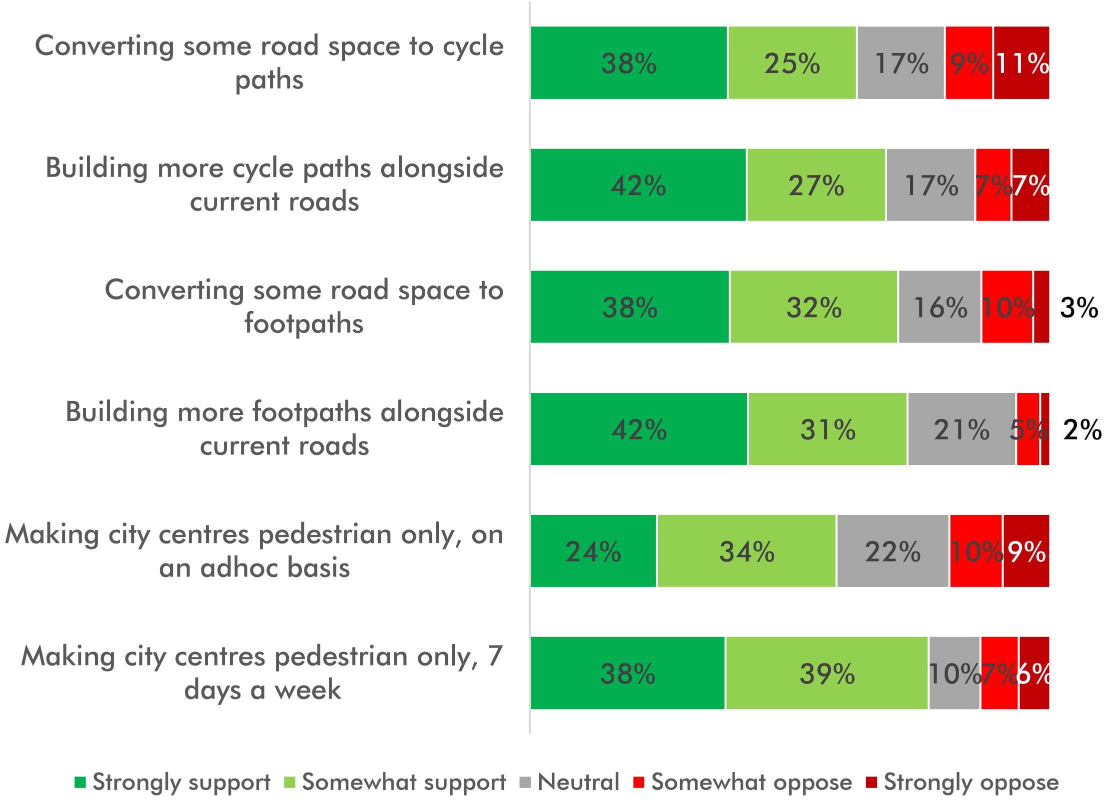
Strong support for improving air quality

Source: Nexus Weekly Covid-19 Attitude Tracker

Improving air quality



Support for initiatives



Evidence from around the world has shown improvements in air quality and reductions in CO_2 as a result of lockdown restrictions. What are your thoughts on this?
Base: All respondents n=437, Week 4 – 1st May 2020

To what extent do you support or oppose the following initiatives to at least maintain the air quality improvements we've seen once things return to normal?
Base: All respondents n= 443, Week 5 – 8th May 2020

For more information

An itemised list of topics covered since March 2020

Topics covered by the Insight Panel.

Tracker Topics	Results week number
Mood of the panel	Wk1 to Wk17 (10/04/20 to 31/07/20)
Outlook for the region regarding Covid	Wk1 to Wk17 (10/04/20 to 31/07/20)
Levels of concern around Covid	Wk1 to Wk17 (10/04/20 to 31/07/20)
Health benefits from walking and cycling	Wk1 to Wk17 (10/04/20 to 31/07/20)
How have transport providers handled the pandemic	Wk1 to Wk17 (10/04/20 to 31/07/20)
When will you next use public transport?	Wk1 to Wk17 (10/04/20 to 31/07/20)
Leisure activities	Wk1 to Wk17 (10/04/20 to 31/07/20)
Holiday booking	Wk1 to Wk17 (10/04/20 to 31/07/20)
Working from home.	Wk1 to Wk8 (10/04/20 to 29/05/20)
NHS Covid-19 contact tracing app	Wk2, Wk6 (17/04/20 & 15/05/20)
Financial wellbeing	Wk3, Wk9 (24/04/20 & 05/06/20)
Public transport, Covid-secure arrangements	Wk4 to Wk8 (01/05/20 to 29/05/20)
Cycling and walking improvements	Wk5 (08/05/20)
Air quality improvements	Wk5 (08/05/20)
Understanding of “Stay alert”	Wk6 (15/05/20)
Understanding of NHS test and trace scheme	Wk9 (05/06/20)
Willingness to self-isolate	Wk9 (05/06/20)
Passenger requirements for using public transport	Wk9 (05/06/20)
Propensity to wear a face covering	Wk10 (12/06/20)
UK holiday destinations	Wk10 (12/06/20)
Awareness of anti-microbial sanitiser on the Metro	Wk11 (19/06/20)
Number of passengers wearing face covering on the Metro	Wk11 (19/06/20)
Long haul or short haul overseas holidays?	Wk11 (19/06/20)
Social distancing	Wk12 (26/06/20)
Non-essential retail	Wk13 (03/07/20)
Cycling and walking improvements (revisited)	Wk13 (03/07/20)
Air quality improvements (revisited)	Wk13 (03/07/20)
Likelihood of local lockdown	Wk14 (10/07/20)
Nexus Researchers	Wk15 (17/07/20)
‘Eat Out to Help Out’ scheme	Wk15 (17/07/20)
Support or opposition to face coverings in shops	Wk16 (24/07/20)
Support or opposition to lockdown restrictions	Wk17 (31/07/20)

Panel Topics	Month
Attitudes towards group travel	March 2020
Mobile Phone connectivity on the Metro	September 2020
Is free Wi-Fi or a stable phone signal more important?	September 2020
Metro Travel app usage	October 2020
Attitude of passengers towards Nexus Researchers	October 2020
Christmas gift spending how much, on what and when?	November 2020
Internet shopping	November 2020
Covid-19 social distancing and masks, when will it end?	November 2020
Attitudes towards a Covid vaccine	November 2020
Lockdown fatigue	November 2020
Overseas travel and Covid tests	November 2020
Mood of the panel	December 2020
Outlook for the region regarding Covid	December 2020
Levels of concern around Covid	December 2020
Covid-19 social distancing and masks, when will it end?	December 2020
Perceived risk associated with different activities	December 2020
Shopping habits after Covid	December 2020
How have transport providers handled the pandemic	December 2020

Full results from each wave of the tracker are available at www.nexus.org.uk/insight or email business.intelligence@nexus.org.uk