

New insights into mobility and the coronavirus crisis

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Research background and objective

The COVID-19 virus has had a worldwide impact on our daily lives and mobility, also in the Netherlands. In mid-March 2020, the Dutch government implemented measures aimed at halting the spread of the infectious disease. The government has since lifted or relaxed many of these measures and the streets are getting busier. In late March the KiM Netherlands Institute for Transport Policy Analysis used the Netherlands Mobility Panel (MPN) to conduct an initial measurement, relating changes in mobility to personal characteristics, changes in activities outside of the home, and changes in work situations. The research also examined peoples' expectations for the future. In late June and early July, KiM conducted a new measurement among the same respondents, assessing the current state of their mobility and the degree to which their future expectations had changed.

Research approach

The research was conducted among a sample of some 2,000 panel members of the Netherlands Mobility Panel (MPN). The MPN is a longitudinal panel survey in which a representative group of Dutch residents are questioned about their travel behaviour during consecutive years. For this study, KiM invited all the MPN members who had also participated in the earlier measurement in late March/early April; consequently, it was possible to compare the current travel behaviour with the travel behaviour of the same group of Dutch people at both the start of the coronavirus crisis and during the period prior to the crisis.

Panel members were asked to keep a 'travel diary' covering three consecutive days during the period June 22 to July 4, 2020. Moreover, the diary was supplemented by a personal questionnaire, which aimed to identify the causes for changes in travel behaviour, any aspects of experiences relating to this, and expectations for the future. By repeating many of the questions from the previous measurement, the researchers could examine how these varying aspects had changed during the past months.

At the time when this data was collected, the government had already relaxed many of the measures it had implemented to limit the spread of COVID-19. Schools, restaurants and professions involving physical contact (hairdressers, physiotherapists, etc.) had reopened and (small-scale) events were again permitted, although people still had to stay at least 1.5m away from other people. The governmental advisory to work from home also remained in force.

KiM explicitly asked the participants about their behaviour at that time; additionally, in some cases, the participants were asked to compare this behaviour to how they had behaved prior to the coronavirus crisis impacting their personal lives (retrospective questions). We also asked certain participants about their expectations for both the near future, should the measures remain in place, and for the future once all measures were lifted. The response rate amounted to 2,051 completed diaries, and 2,252 completed questionnaires, or a net response of 81% and 88%, respectively.

This report contains a summary of the key insights. The full brochure - [available in Dutch](#) - presents the key insights derived from the research, which mainly consists of results from descriptive analyses. We occasionally made distinctions according to relevant background characteristics, such as age or region. Moreover, we sometimes compared the present situation to the situation prior to or at the start of the coronavirus crisis: to this end, the researchers relied on data from measurements conducted among the same respondents in September 2019 (prior to the coronavirus crisis) and in late March/early April (at the start of the coronavirus crisis). The respondents from the late March/early April measurement who did not participate in the new measurement were excluded from the analyses. Consequently, the percentages pertaining to the start of the coronavirus crisis do not always wholly align with the previous measurement's published data. The supposition is that many of changes in behaviour occurring between the time periods were due to the coronavirus crisis. However, there could also be other reasons for the differences between time periods, including the weather, life events and non-weather related seasonal effects. Corrections have not (yet) been made for such effects.

Highlights

The main insights derived from the research are:

Outdoor activities

- Dutch people of all ages continue to engage in fewer activities outside of the home than prior to the coronavirus crisis. When compared to the onset of the coronavirus crisis, we observe an increase in activities, yet the elderly pursue even fewer activities. In terms of changes in activities, we observed no significant differences among regions;

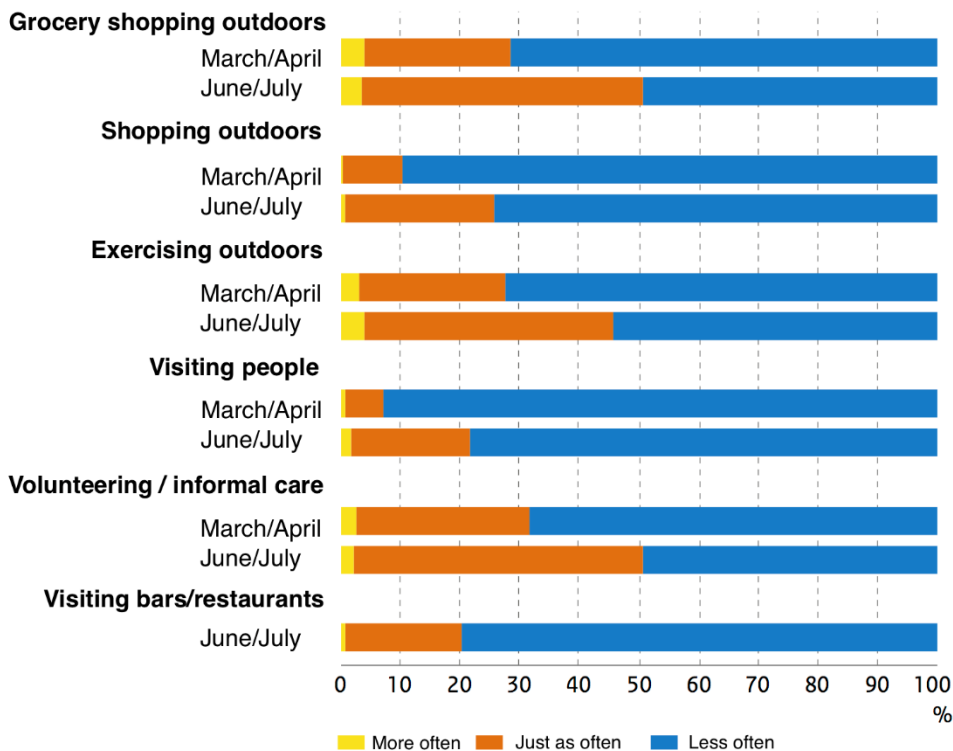


Figure 1. Change in outdoor activities compared to before the coronavirus crisis

- The majority of people presently engaging in fewer activities outside the home do not expect this trend to continue once the coronavirus crisis ends. The group of people who expect this trend to continue has increased, however (from less than 10% for all activities at the start of the coronavirus crisis to 8% to 30% presently, depending on the activity);
- Compared to the onset of the coronavirus crisis, people are now more satisfied with their opportunities for socialising;
- One in five Dutch people cancelled vacation plans due to the coronavirus crisis. This year, some 60% of all planned (summer) vacations are in the Netherlands. According to the *Continu Vakantie Onderzoek* (CVO [Continuous Vacation Panel]), that figure was approximately 42% in 2018;
- Of those planning to vacation abroad, approximately 64% expect to travel by car and 28% by plane. According to the CVO, the percentages in 2018 for traveling to destinations abroad were 53% by car and 37% by plane.

Work and education

- The number of home workers has decreased slightly since the start of the coronavirus crisis. Presently, some 48% of all employed people work (partly) at home, compared to 54% at the onset of the crisis;

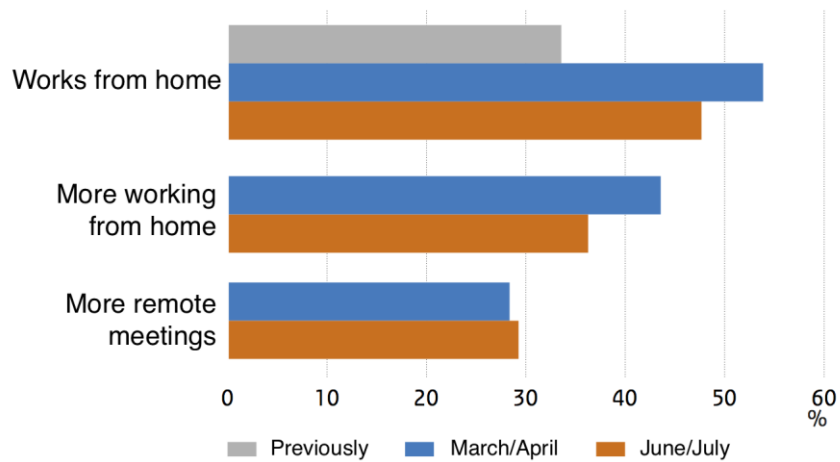


Figure 2. Changes in work situation

- People are still largely positive about their experiences with working from home and meeting remotely; however, some home workers also experience negative effects of working at home, including a poorer work-life balance (36%) and physical (17%) and psychological (10%) ailments;
- More than 60% of home workers expect to work from home more frequently in the coming months than prior to the coronavirus crisis. The percentage of home workers expecting to also work from home more frequently after the crisis ends increased from approximately 25% to 45%;

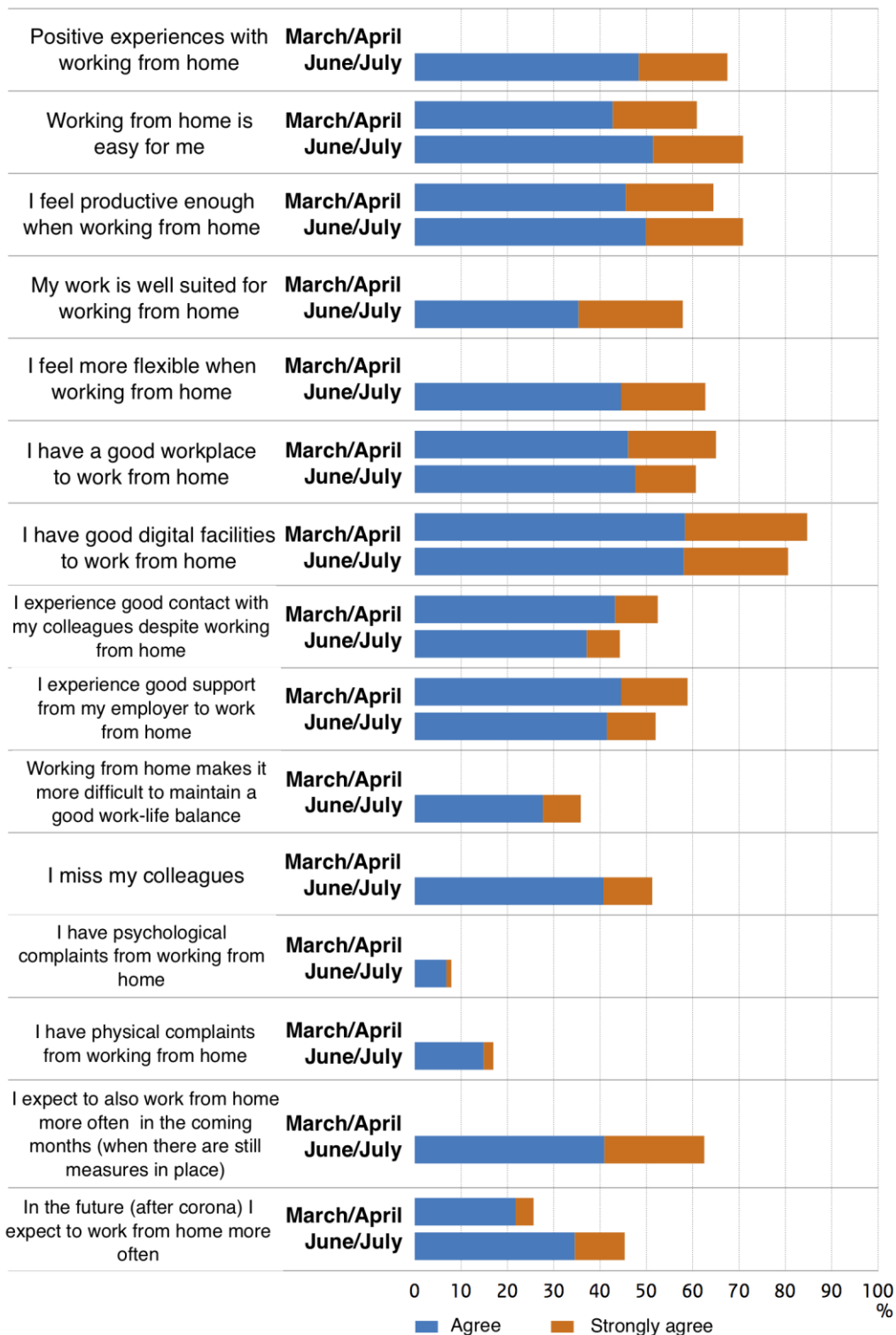


Figure 3. Experiences and expectations with working from home (not all items were part of the survey in March/April)

- People expect that their working more frequently from home will account for only a part of their working hours. The majority (around 60%) of home workers expect that in future they will work from home for one to two days per week. Less than 10% of teleworkers expect to work from home for more than 25 hours per week;

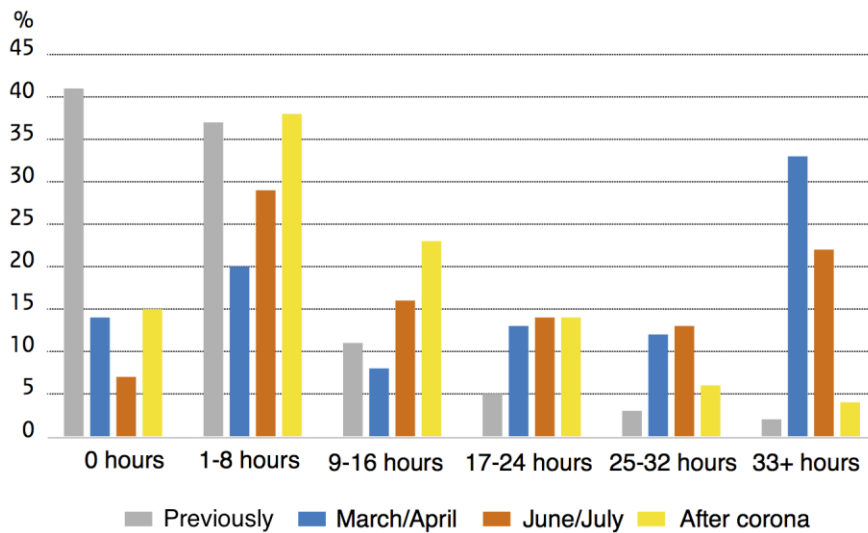


Figure 4. Number of hours per week working from home (only respondents who are currently working from home or indicated to have increased their hours working from home)

- Only a small percentage (8%) of students are once again pursuing their educational courses completely on-site. Students who were allowed to (partially) return to their educational institutions were positive about the experience;

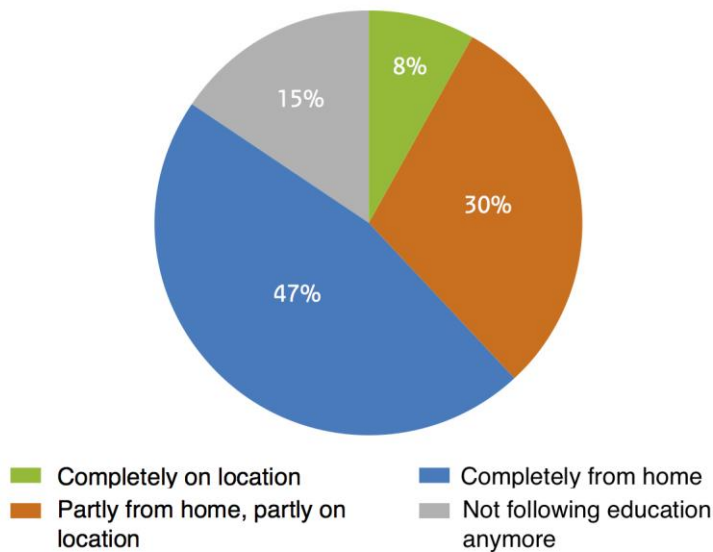


Figure 5. Location where students and school pupils follow education

- Compared to people who work remotely from home, students were significantly less positive about their experiences with remote learning; however, since the start of the coronavirus crisis, students have become somewhat more positive.

Travel behaviour

- Dutch people are going out more than at the start of coronavirus crisis. Presently, around one-third of Dutch people do not leave their homes on an average day; that figure was 20% prior to the corona crisis, and 50% at the start of the crisis;
- The number of trips and total distance travelled are once again increasing, as compared to the start of the coronavirus crisis, yet they remain lower than prior to the crisis. Currently, people take 29% fewer trips than before the crisis, and travel 37% fewer kilometres. Bicycles claim a greater share of mobility than prior to the crisis, with this increase partly attributed to the growth of e-bike use, among other factors;

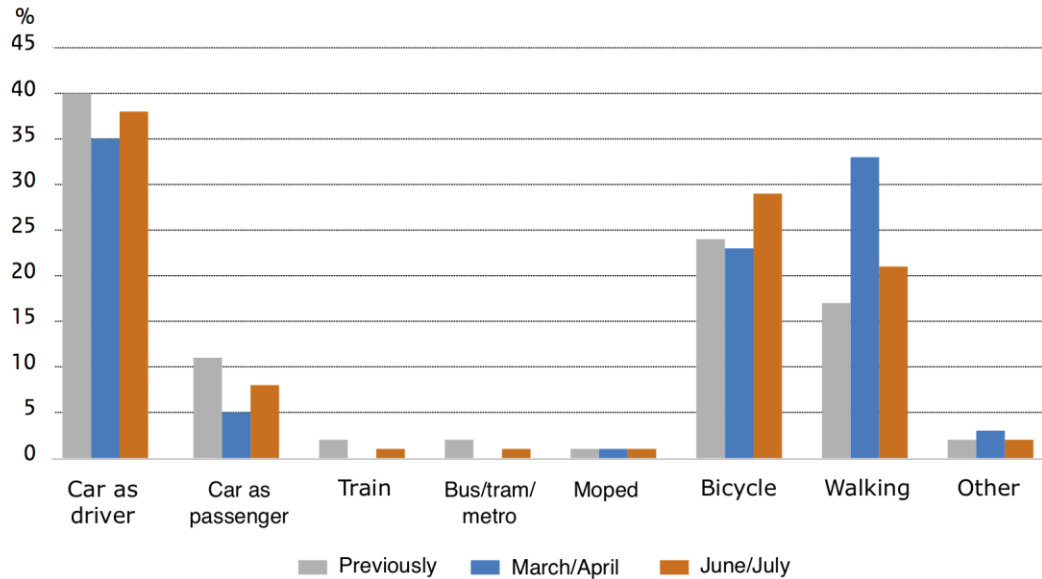


Figure 6. Share of travel modes (in trips)

- Compared to the situation prior to the coronavirus crisis, people now hold a much more negative view of public transport: the majority of people (84%) currently (still) prefer to use individual transport;

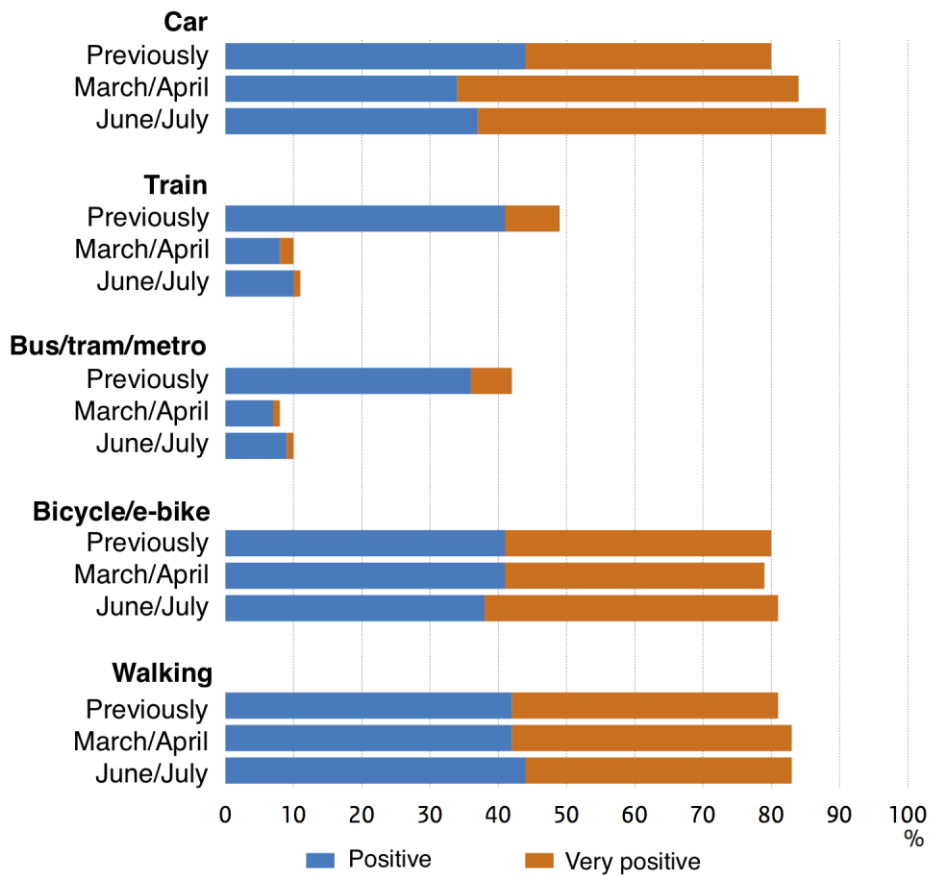


Figure 7. Attitudes towards travel modes

- Of the people who now travel less by train, 46% use cars more frequently, while 14% more often use bicycles as replacements for train trips. As replacements for BTM trips, 41% more frequently use cars, 37% bicycles, 5% mopeds/scooters, and 17% walk more frequently;

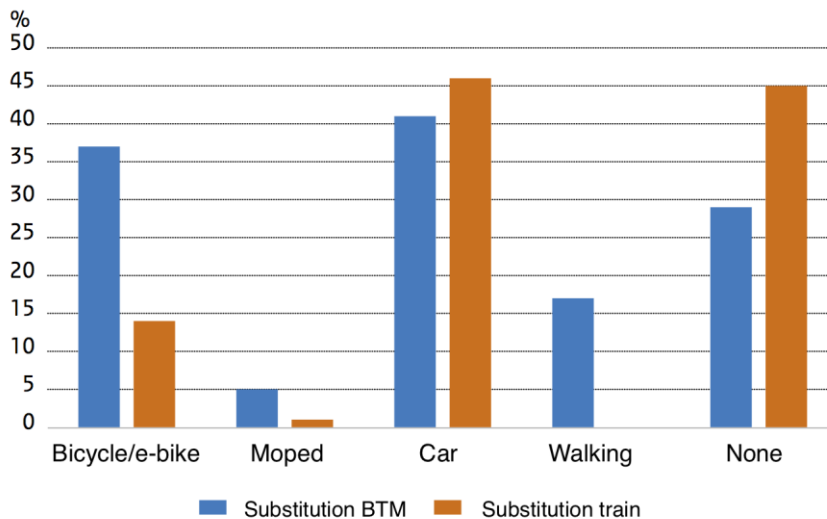
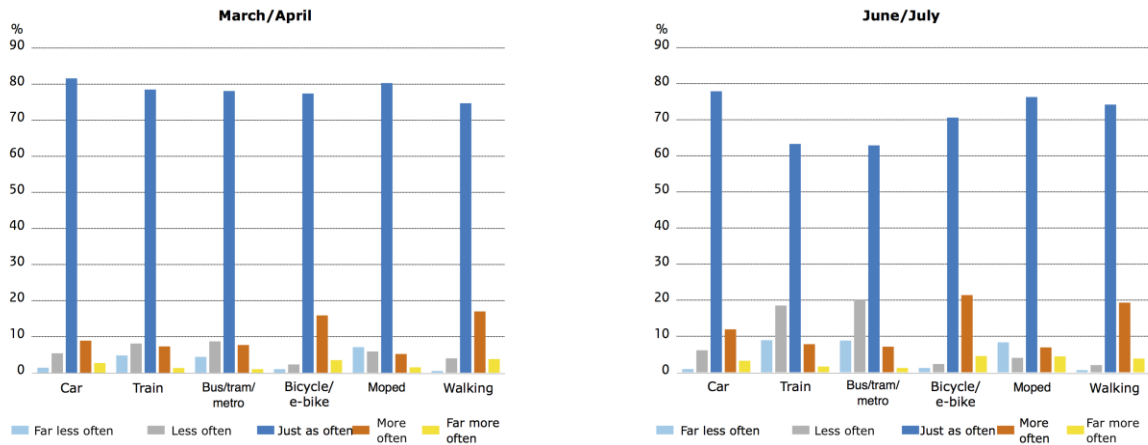


Figure 8. Use of alternative travel modes to replace public transport (only respondents who are currently using public transport less often compared to before the coronavirus crisis)

- Even after all the coronavirus measures have been lifted, some people still expect to use alternative modes of transport. Of the people now using bicycles more

frequently as replacements for public transport, 52% expect to continue doing so after the crisis has ended, while the additional corresponding shares are 47% for mopeds, 34% for cars, and 40% for walking;

- At the start of the coronavirus crisis, some 80% of people expected to use the same transport modes after coronavirus crisis as they did prior to the crisis. Some 20% expected to cycle and walk more. Presently, approximately 28% expect that when the crisis ends they will use public transport less than prior to the crisis, compared to 8% who expect to increase their public transport use. 26% believe they will cycle more frequently, and 23% that they will walk more, while only 4% and 3%, respectively, expect to do so less frequently. As for cars, 14% of people expect to increase their car use, while 7% expect it will decrease;



- Increasing numbers of people expect to fly less. Presently, 38% of people who fly frequently expect to fly less after the coronavirus crisis; this percentage was 20% at the start of the coronavirus crisis.

Perceived impact of the coronavirus

- The percentage of people who fear they will be infected has decreased from 35% to 20% since the start of the coronavirus crisis. Among the elderly, the percentage of people fearing infection remained higher than average, at 36%, but here, too, there was a decrease;
- The majority of Dutch people (approx. 83%) expect the coronavirus crisis to have a long-term impact on society; this percentage is slightly lower than at the start of the crisis (approx. 89%).