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COVID-19
TRANSPORTATION INSIGHTS SURVEY

The Mother of Invention?

How COVID-19 Necessities Have (and Haven't) Changed the Way People Travel

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AN OVERVIEW OF THE

COVID-19

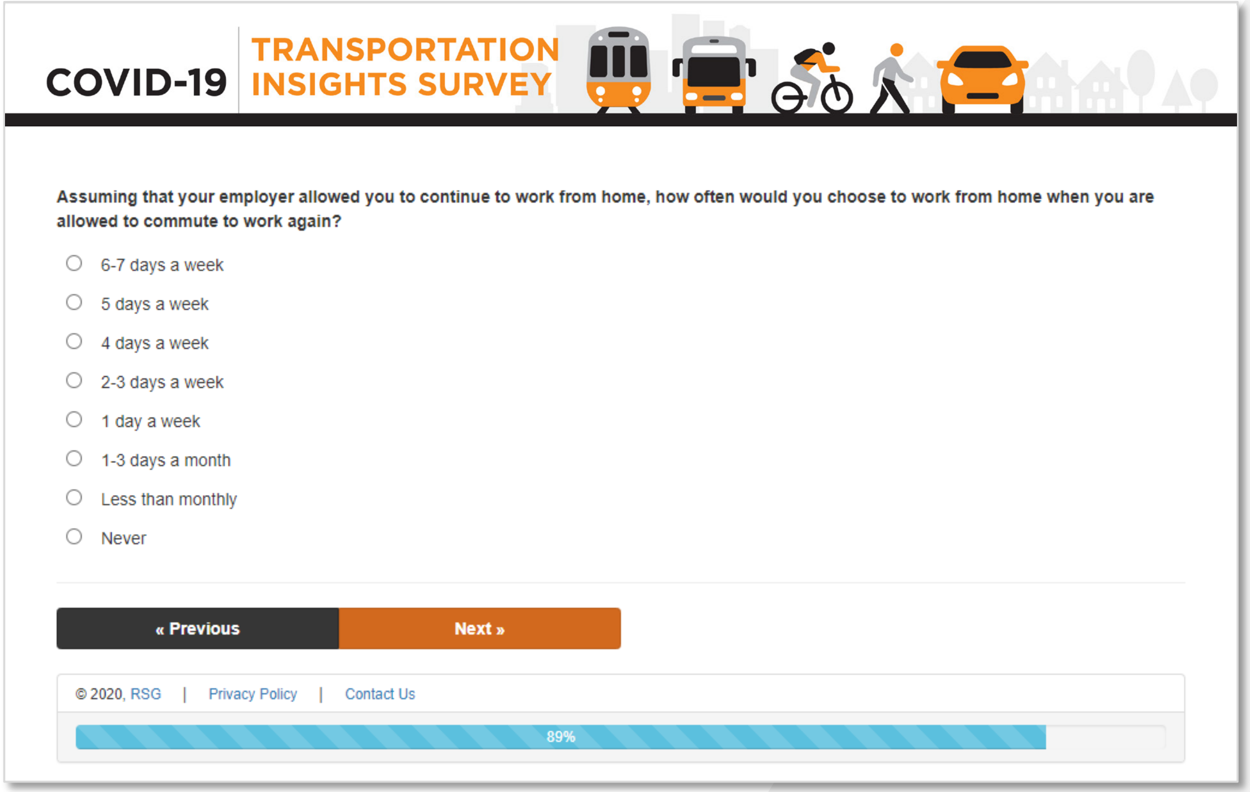
TRANSPORTATION INSIGHTS SURVEY

- Nationally representative, repeated, cross-sectional survey
- Captures how travel behaviors and attitudes are changing
- Powerful tool as conditions, sentiments, and choices evolve

To-Date: Survey fielded **9 times** from May 2020 to September 2021

Survey Methodology & Composition

Designed for Repeatable Implementation



Source: COVID-19 Transportation Insights Survey

- First administered in **May 2020**
- New survey waves every ~2-3 months as pandemic conditions and response behavior changes
- **3,000+ participants recruited each wave** via national online panel (Full Circle) and monitored for representation
- Data are weighted to ensure regional and demographic representation

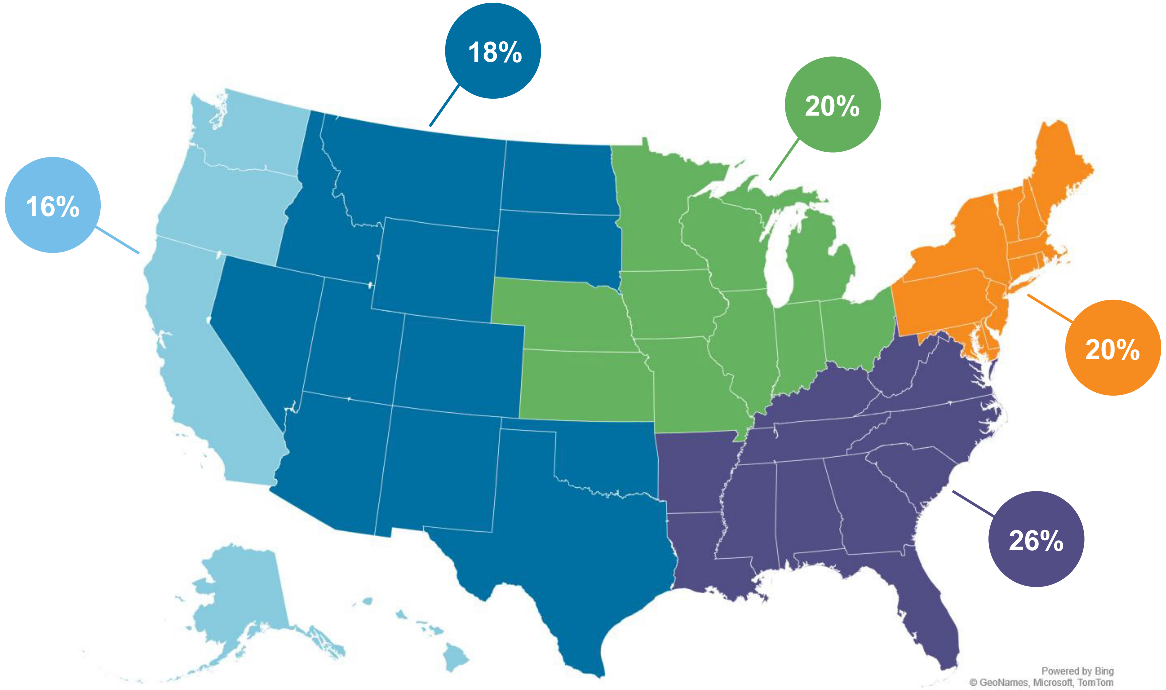
Questionnaire with 100+ questions measures baseline behaviors and changes over time.

Wide Range of Topics

- **Travel mode use** (now & pre-March 2020)
- **Travel replacement** (now & pre-March 2020)
- **Long-distance travel** (now & pre-March 2020)
- **Teleworking** (now & pre-March 2020)
- Perceptions about **COVID-19 risk** to self, household, & US population as a whole
- Current & future **school plans**
- **Future teleworking** expectations
- Attitudes about **current & future travel**
- Detailed **demographics & employment** information

Unweighted and Weighted Demographic Composition

27,500+ Respondents Surveyed



Race/Ethnicity	Sample	Weighted*
White	64%	64%
Black / African American	11%	12%
Hispanic	16%	15%
Other / multiple	9%	9%

Age (Adults)	Sample	Weighted*
18 - 34	27%	30%
35 - 64	51%	49%
65 or older	22%	21%

Income	Sample	Weighted*
Under $25,000	20%	13%
$25,000–$49,999	25%	18%
$50,000–$99,000	33%	32%
$100,000 or more	22%	37%

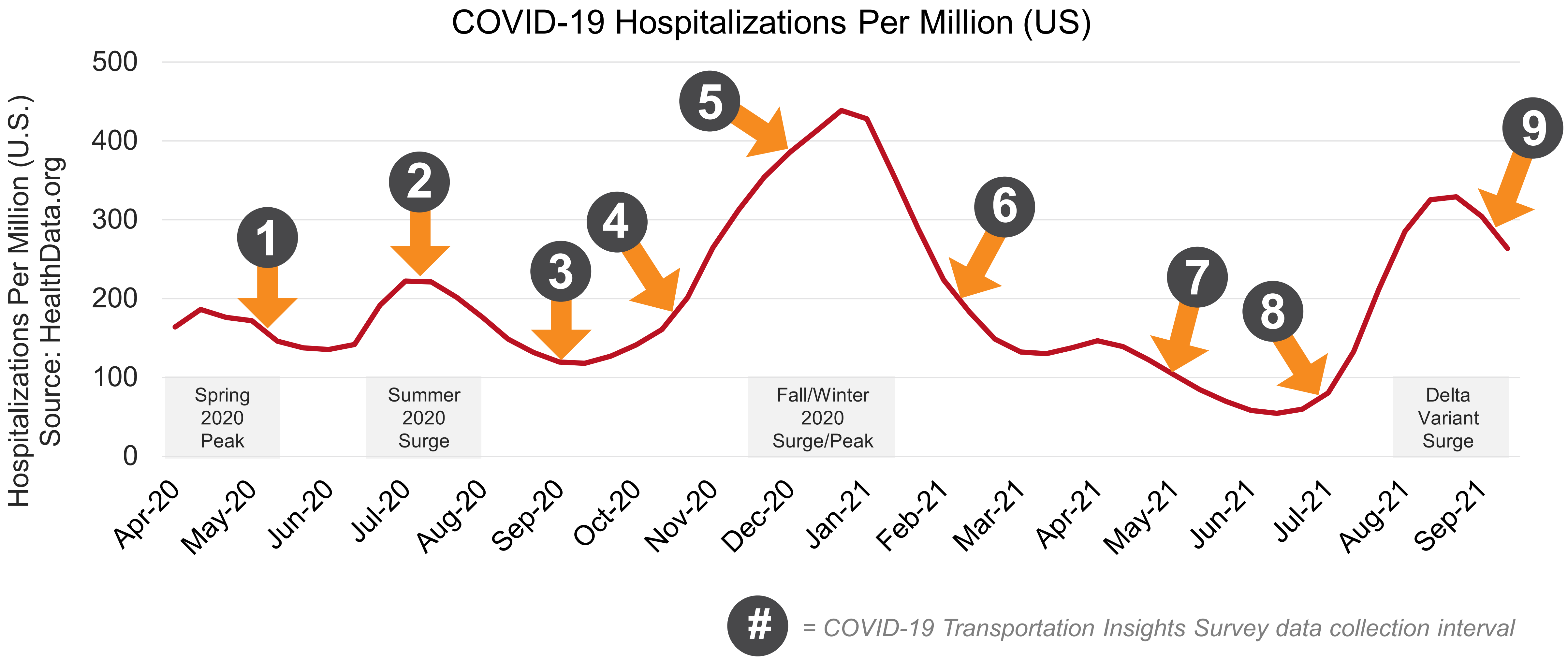
**Based on 2019 ACS PUMS*

Each wave is weighted individually to ACS 2019 to allow cross-wave analysis.

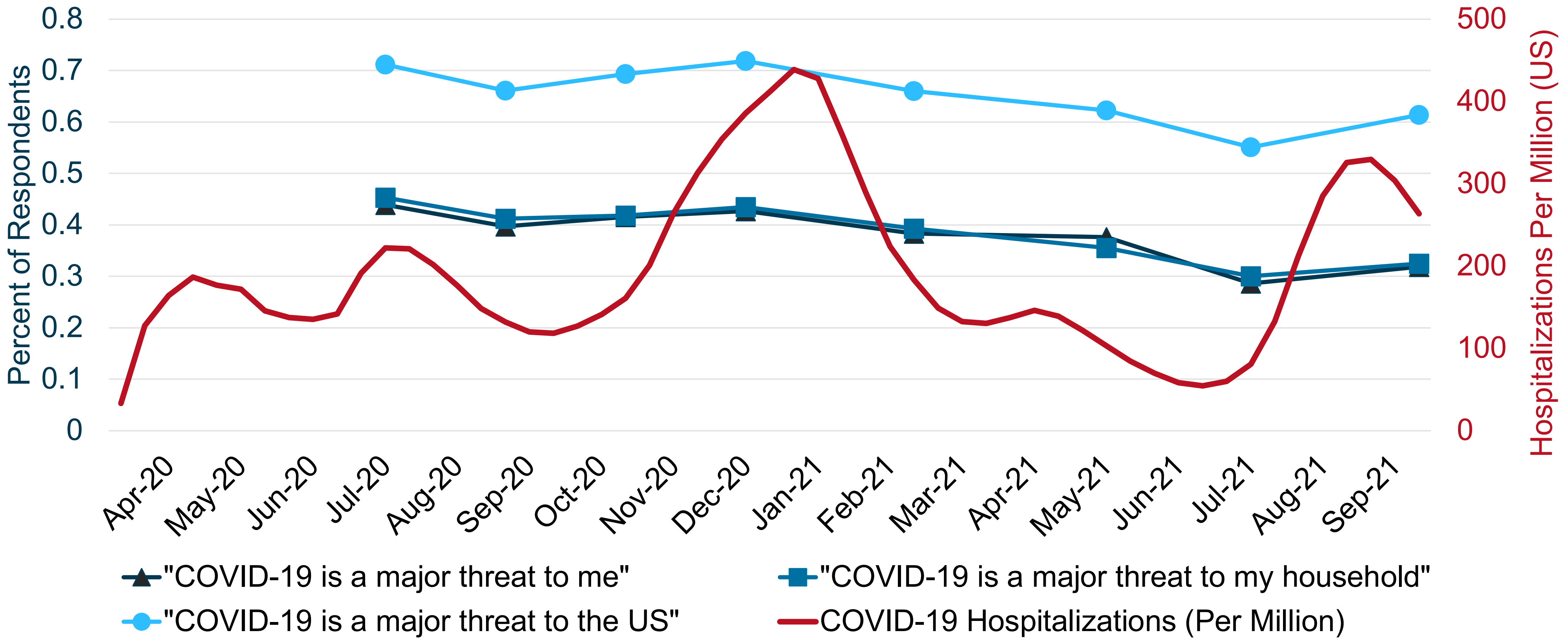
Weighting Controls

- **Regions:** Northeast, Midwest, Southeast, Texas/Mountain, Pacific, and specific major states
- **Household-Level:** Income in 2019, household size, number of workers, vehicle ownership, and family/nonfamily by presence/absence of children
- **Person-Level:** Age group, 2019 employment status, gender by presence/absence of children, race/ethnicity by income (under and over $50,000), and college degree or not

Survey Data Collection Through Outbreak's Peaks and Valleys



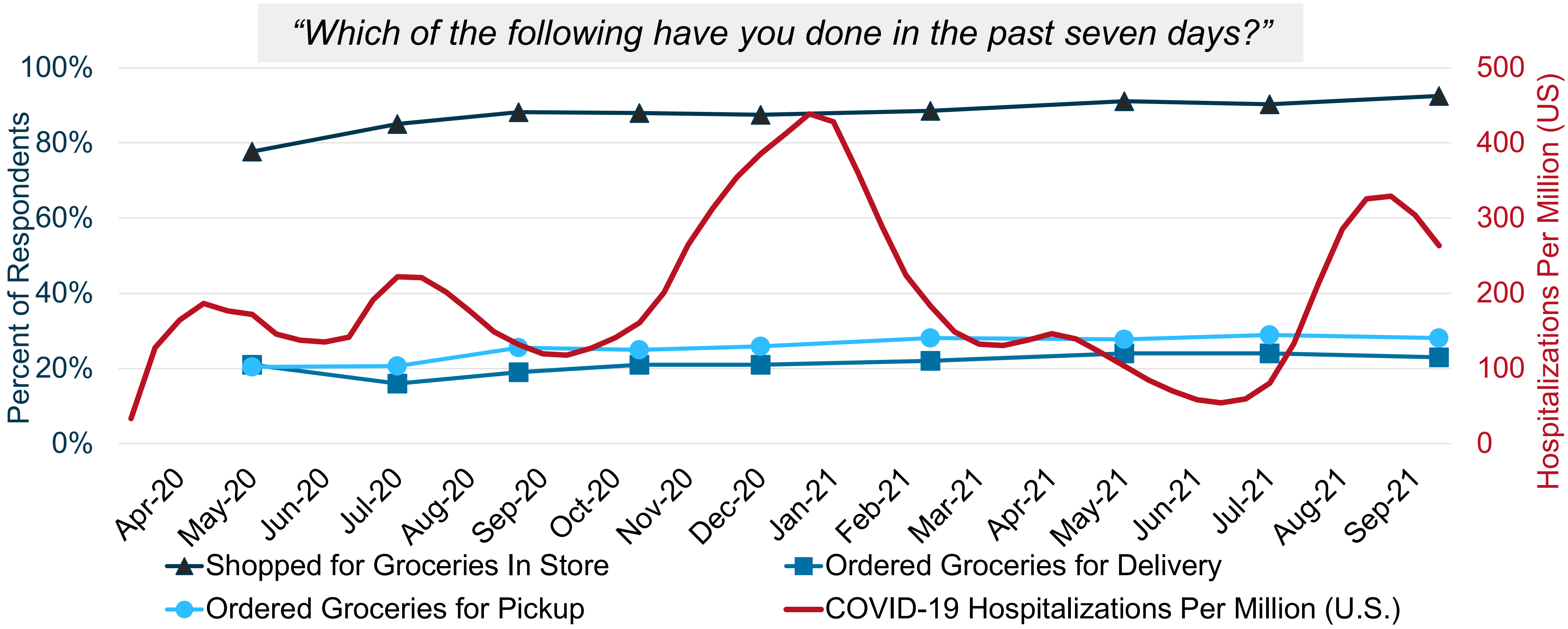
US residents have consistently viewed risk to others as higher than risk to themselves, despite hospitalizations.



TREND 1

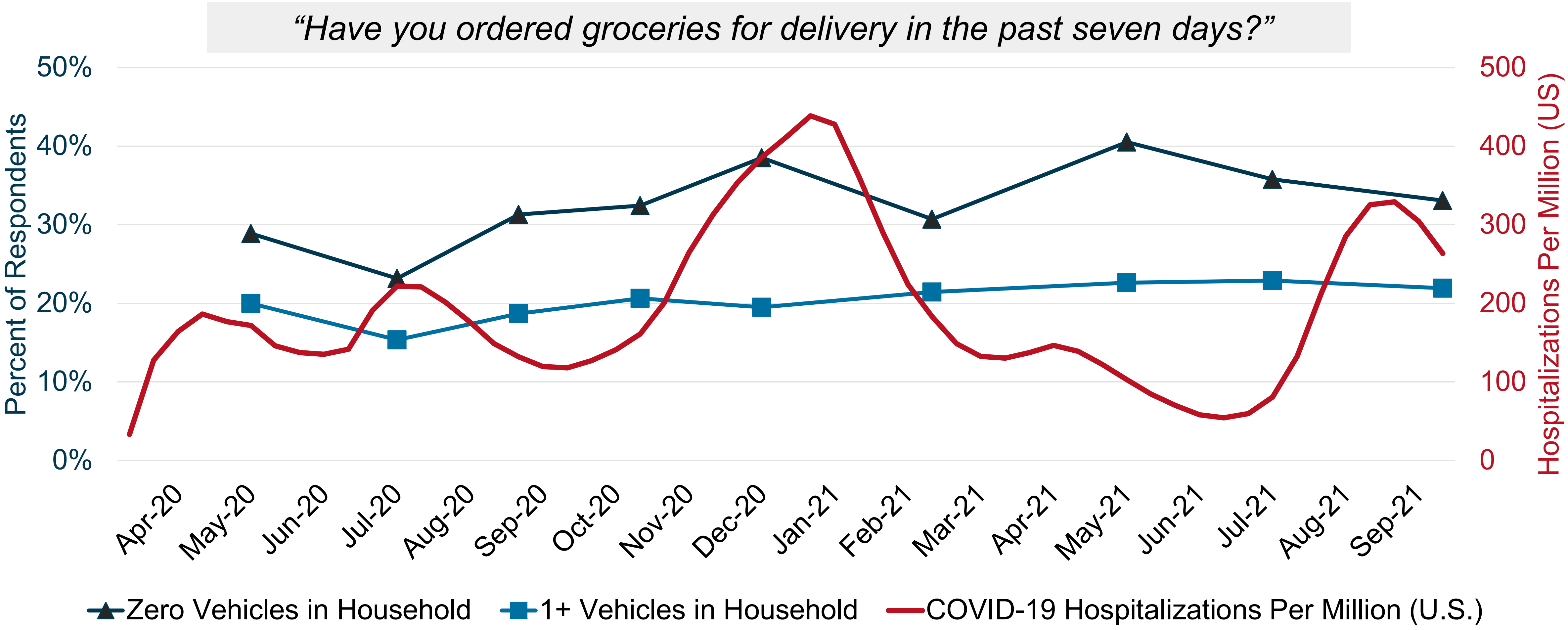
Grocery Shopping Alternatives

Grocery delivery and pickup have remained steady, even as shoppers return to grocery stores in person.*

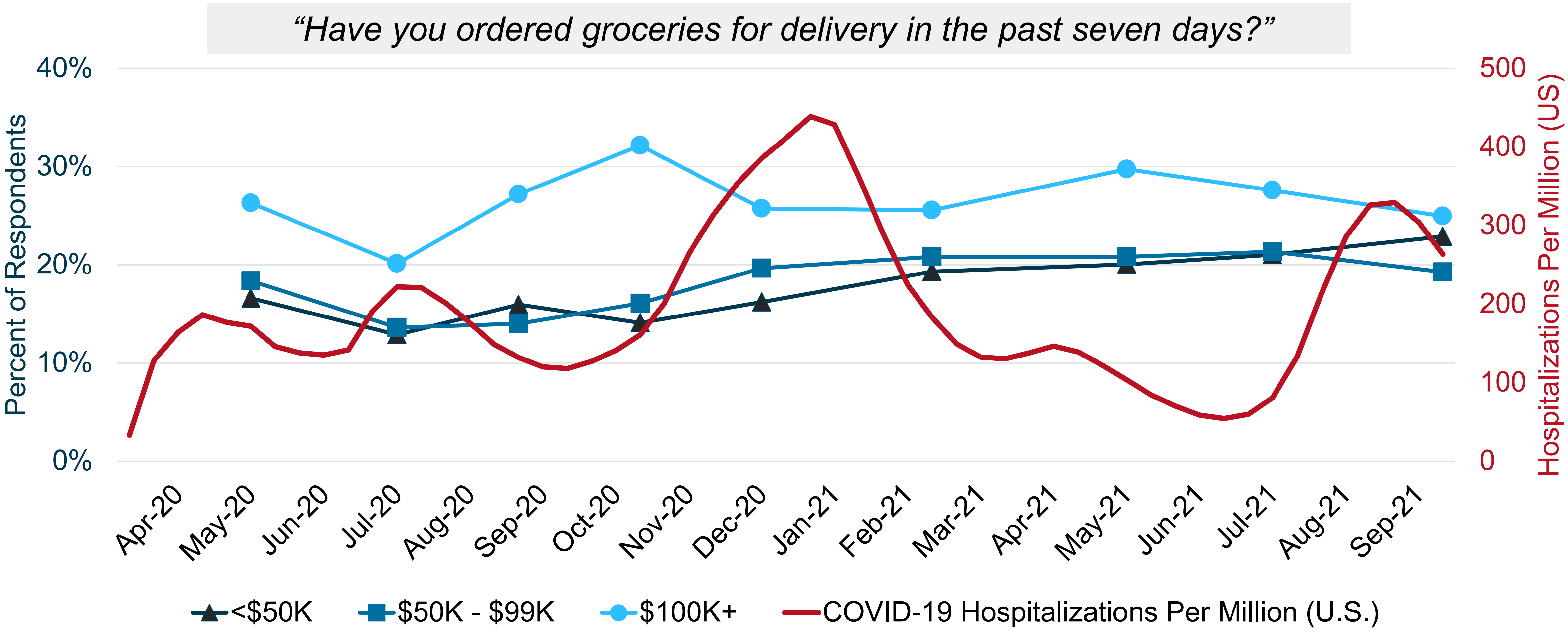


*Less than 15% of respondents reported ordering groceries for pickup or delivery prior to March 2020.

Zero-vehicle households are more likely than vehicle households to order groceries for delivery.



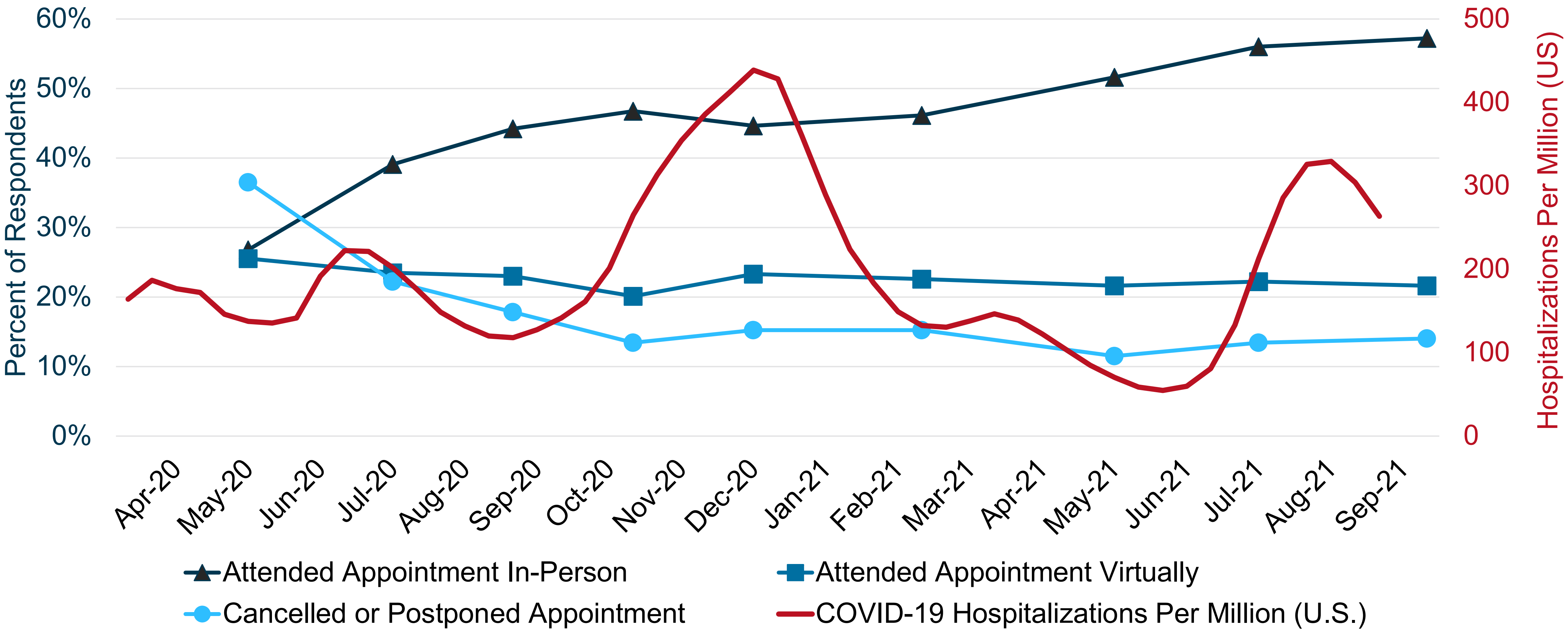
Higher-income groups are more likely than lower-income groups to order groceries for delivery.



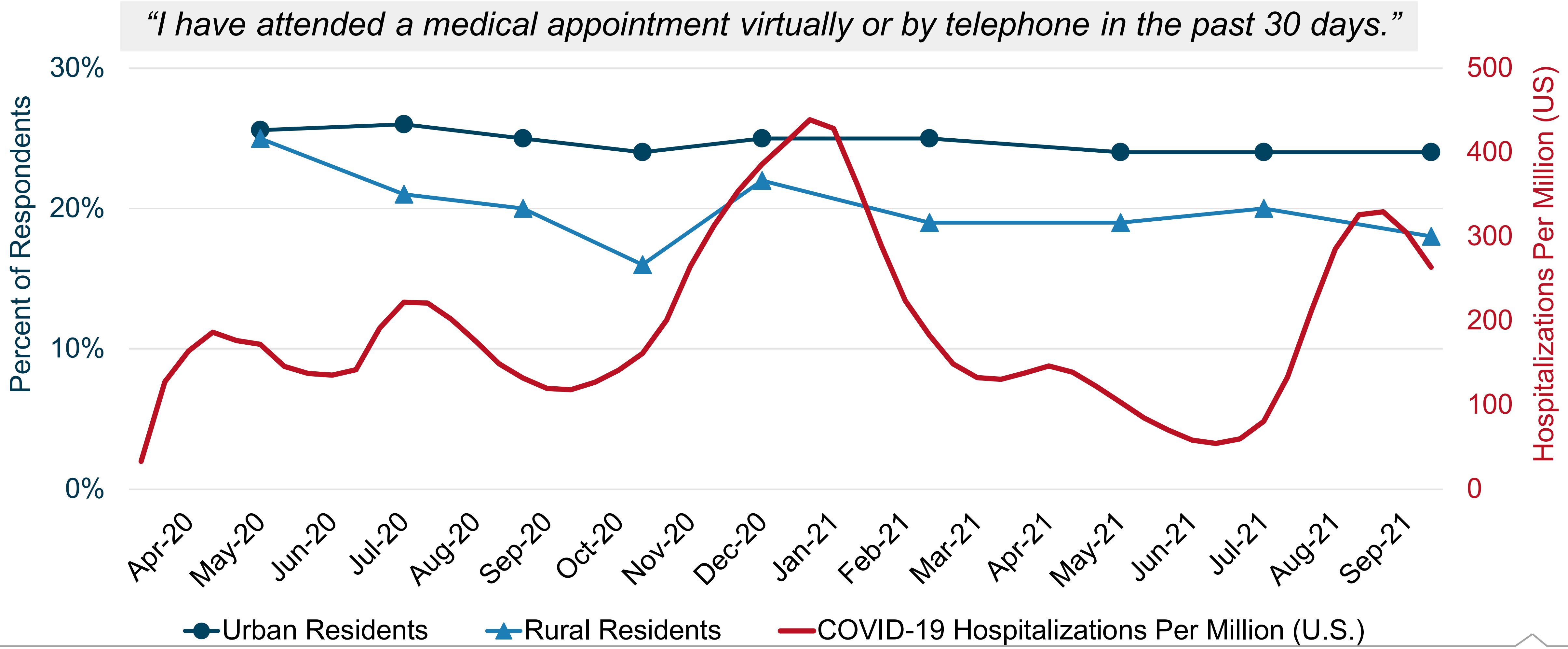
TREND 2

Medical Appointment Alternatives

Use of telehealth services has remained stable throughout pandemic while in-person appointments steadily increase.

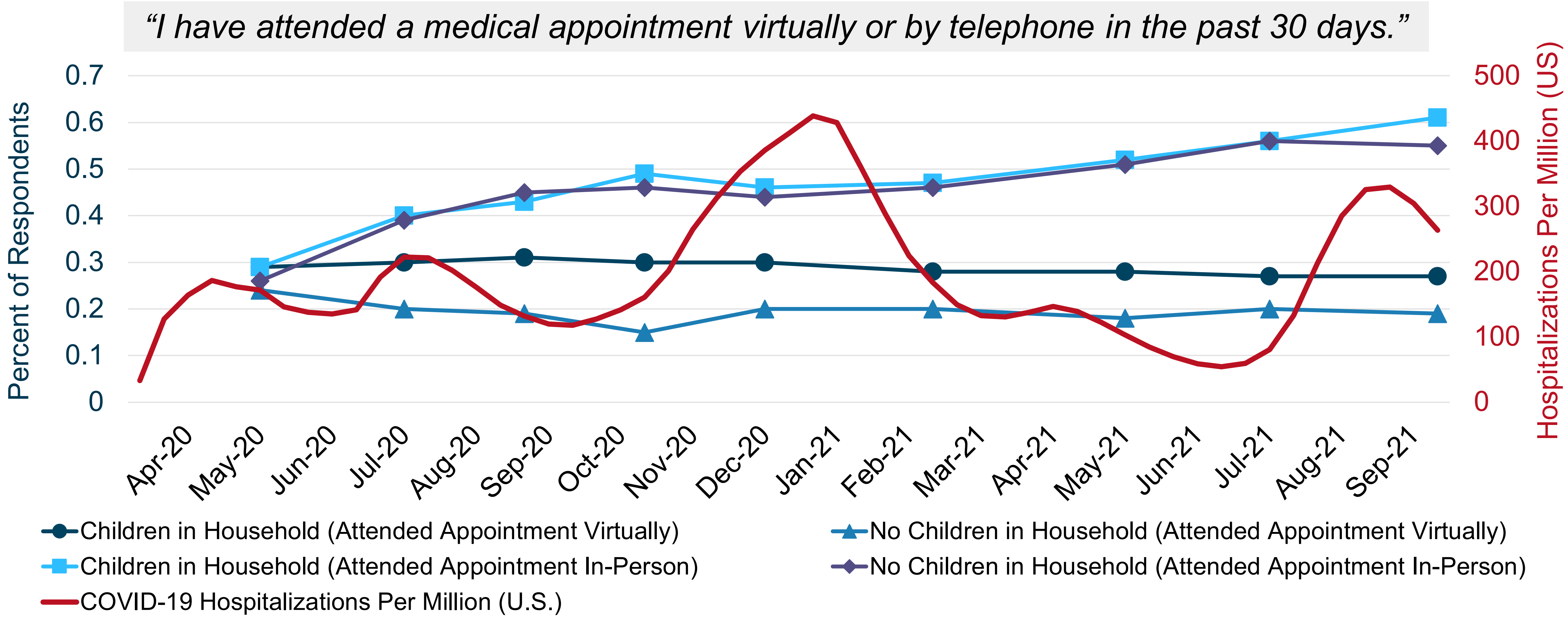


Rural telehealth use peaked at pandemic outset and winter ‘20 – ‘21 surge while urban telehealth use remained steady.*



*Urban residents are those who live in zip codes with densities greater than 1,000 people per square mile.

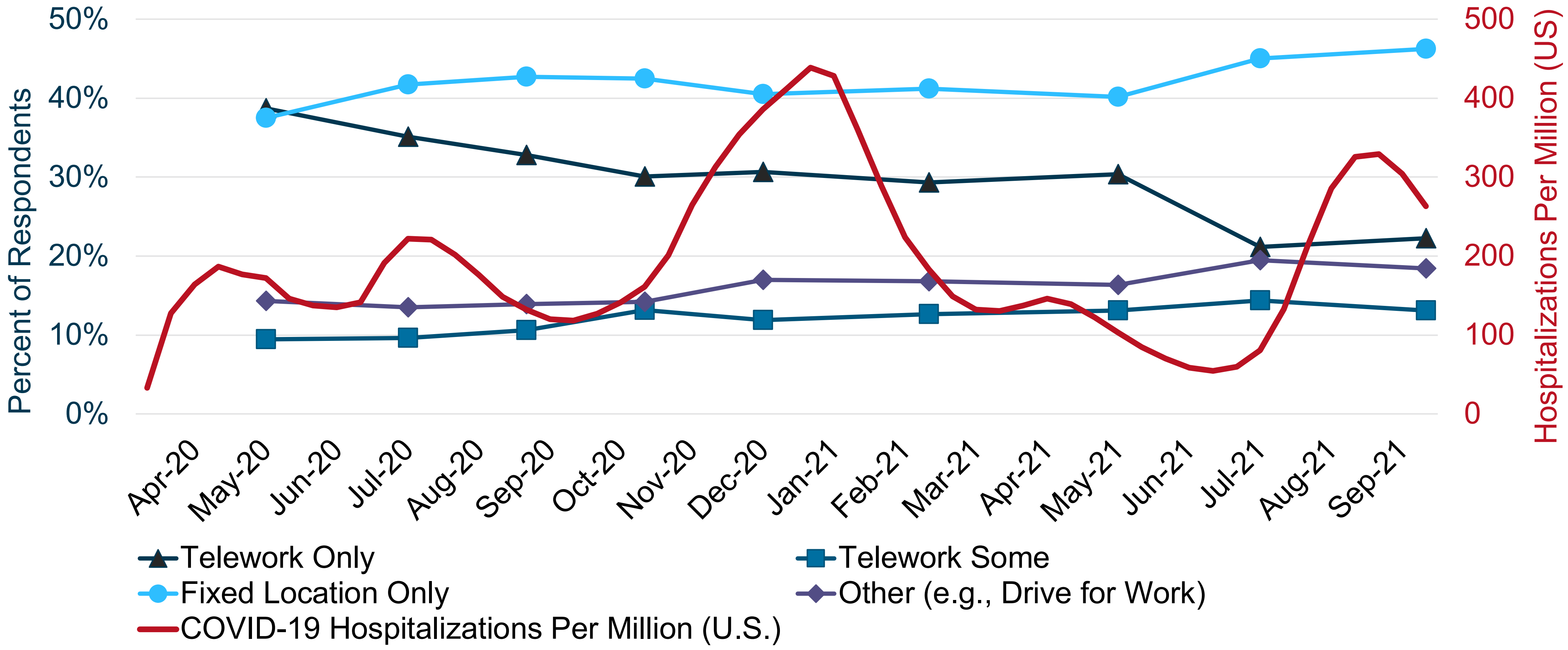
Households with children are more likely to use telehealth (while being equally likely to attend in-person appointments).



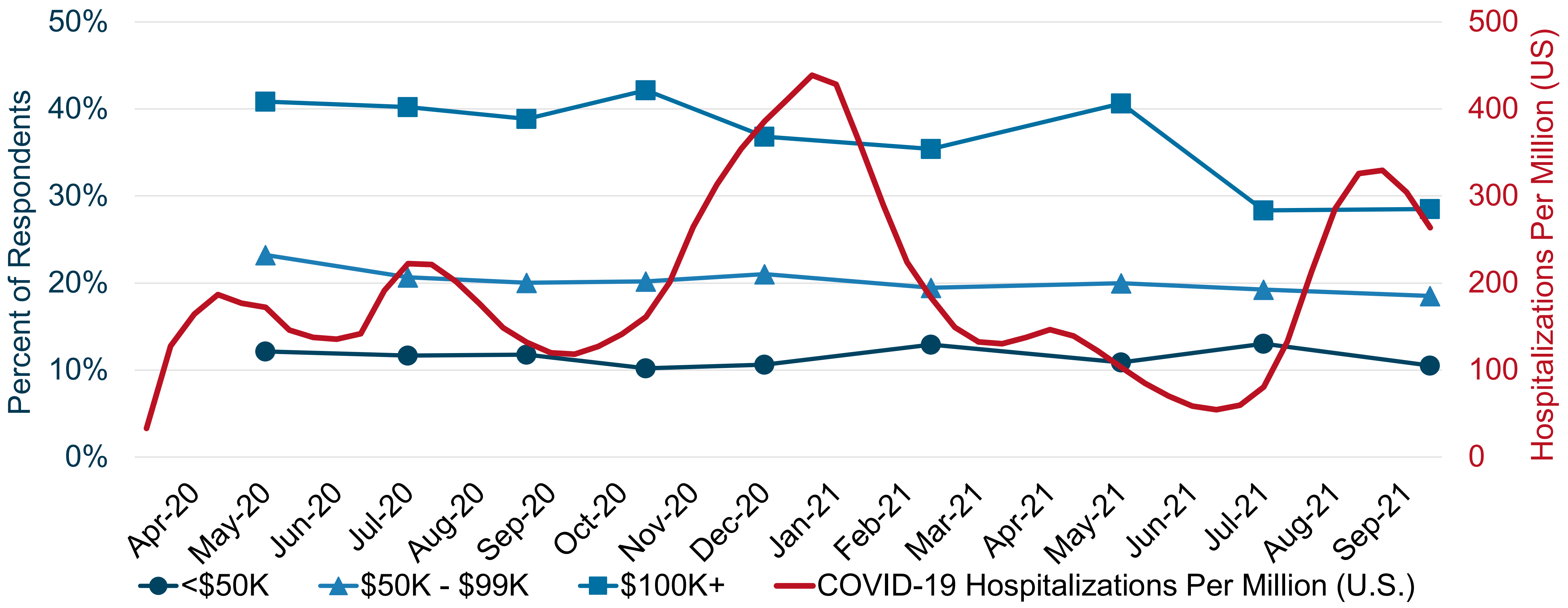
TREND 3

Working from Home

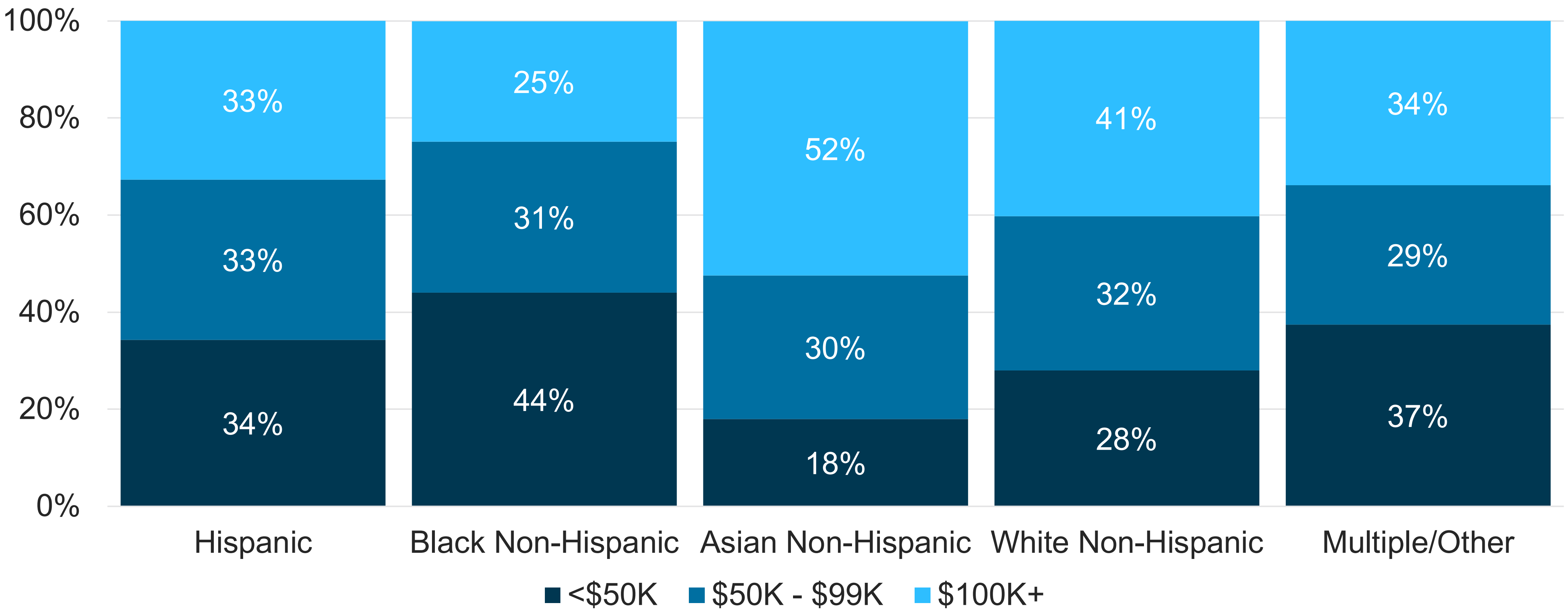
Partial telework has remained steady while full telework has declined throughout course of pandemic.



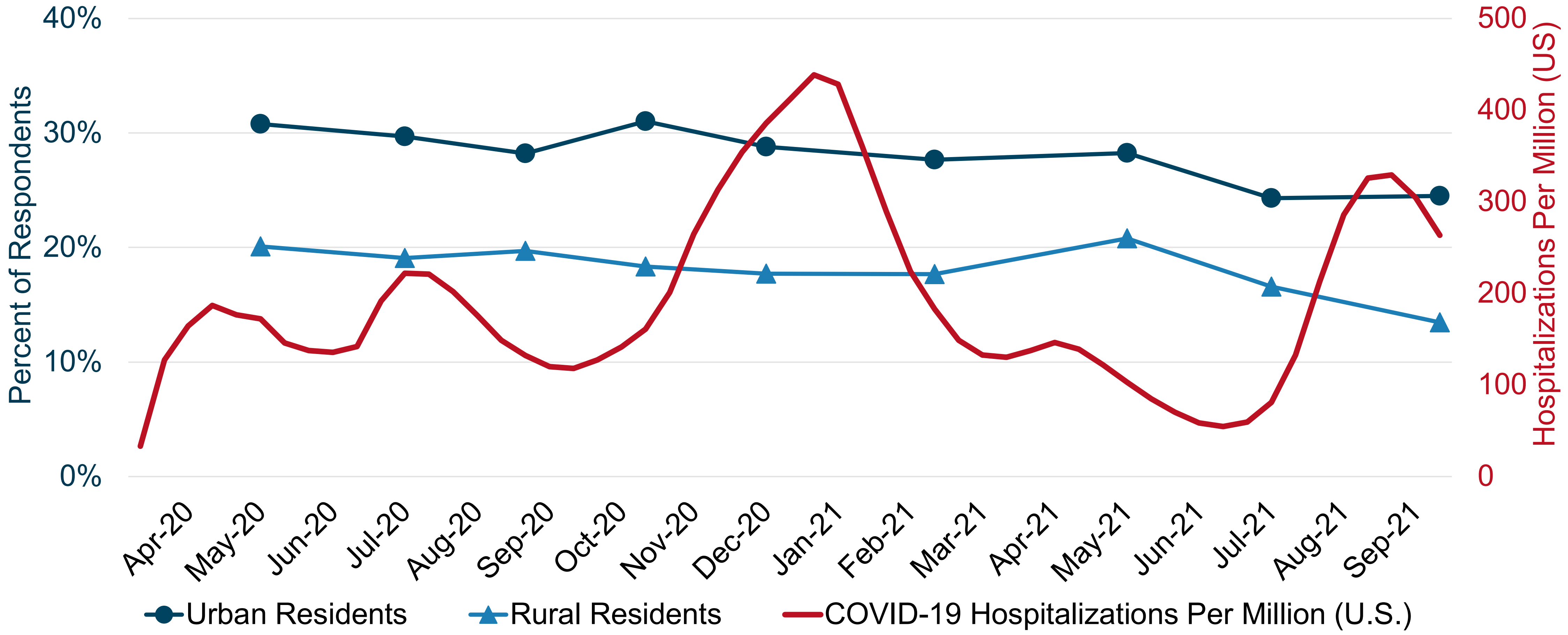
High-income groups are consistently more likely to telework (including partial teleworking) than low-income groups.



Income proportions vary greatly by race/ethnicity, significantly influencing share of teleworkers by race/ethnicity.



Urban residents are more likely to telework than those in rural settings.



**Urban residents are those who live in zip codes with densities greater than 1,000 people per square mile.*

Conclusions

COVID-19 necessities have driven lasting trends among some groups much more than others.

Key Takeaways

- **Grocery pickup and delivery** will likely continue to supplement in-store shopping, particularly among high-income and zero-vehicle households.
- Similarly, **telehealth** will likely continue to supplement in-person appointments, especially among adults in households with children.
- Income continues to significantly influence **telework access**, which in turn impacts telework access among Black and Hispanic residents.

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Want to learn more?

Join us for our upcoming webinar.

January 26 from 1–2PM ET

rsginc.com/covid-19-webinar