

A photograph of a bicycle's handlebars and front wheel, with a city street and buildings in the background. The image is overlaid with a semi-transparent white banner containing text.

**Cycling Back**  
transport options after COVID-19  
**An Amárach Briefing**  
May 2020

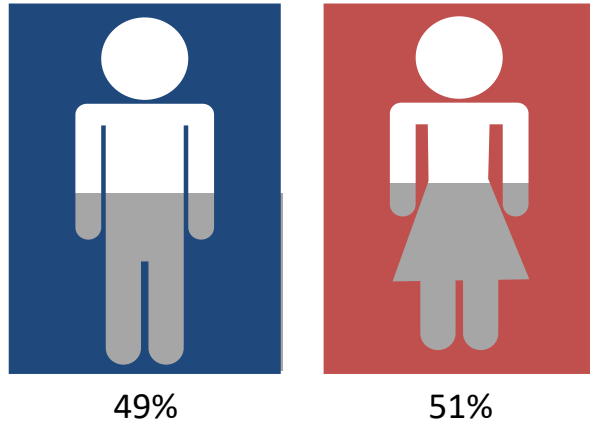
# Purpose of the Research

- We undertook a quick snapshot of Consumers' Journey to Work at the end of May.
- We asked some straightforward questions of our mobile panel on Monday 25<sup>th</sup> May 2020. Fieldwork was completed on the same day.
- The survey findings have been weighted to be representative of the national population.
- As a country we are beginning to plan for the gradual easing of Lockdown. The duration of lockdown has meant that a large majority of the workforce have not been commuting to work. As the lockdown eases and the journey to work returns, one key challenge will be how will people get to work.
- The short poll gives a useful initial snapshot of some of the challenges that people will face and the issues that will need to be resolved if the return to work is to happen smoothly.

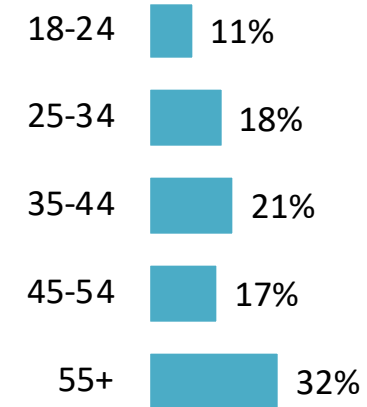
# Sample Profile

(BASE : All respondents – 2,043)

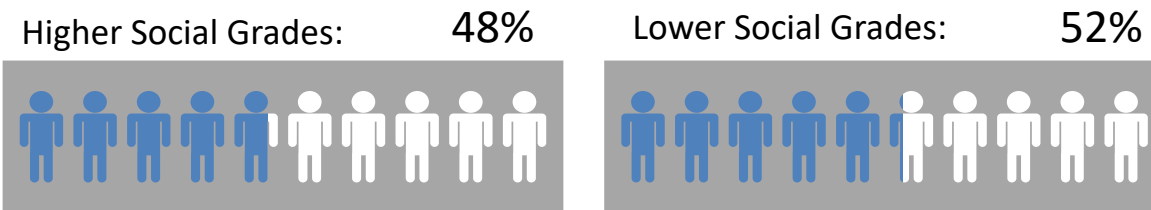
## GENDER



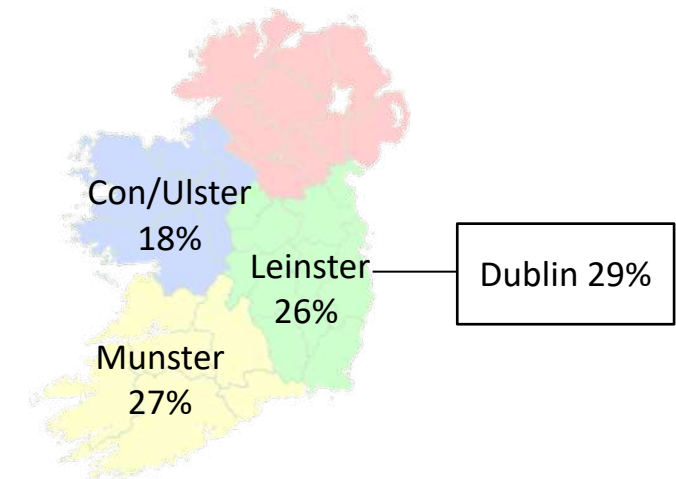
## AGE



## SOCIAL CLASS



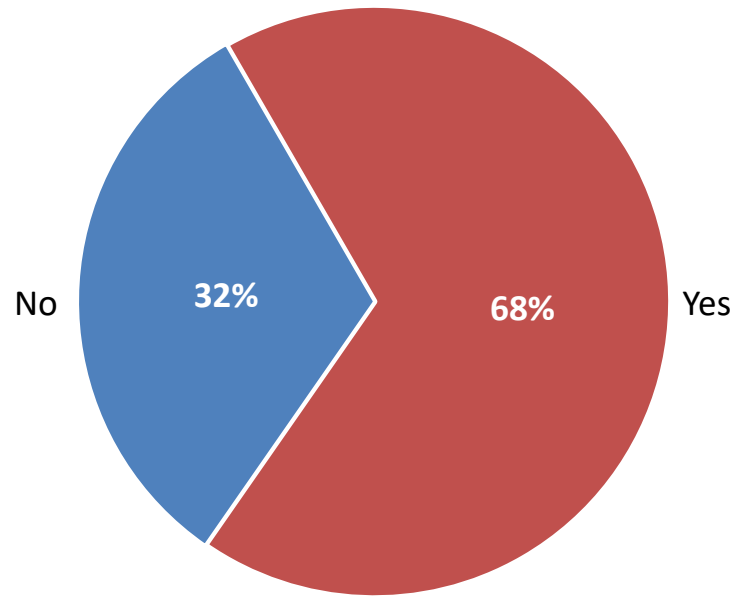
## REGION



Data gathering took place on Monday 25<sup>th</sup> May 2020.

# Two thirds of our sample worked outside the home before the Covid crisis

(BASE : All respondents – 2,043)

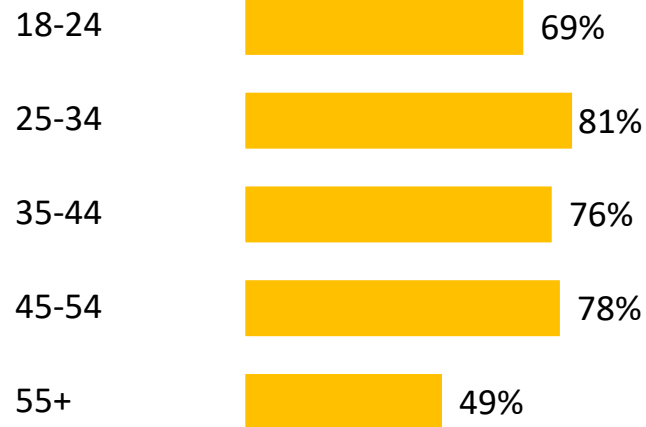


## DEMOGRAPHICS FOR YES

### Gender



### Age



### Region



### Social Class



# With just under half (48%) commuting less than 10km to work

(BASE : All that worked outside the home – 1388)

|                          | GENDER |        | AGE   |       |       |       |     | REGION |          |         |             | SOCIAL CLASS |           |
|--------------------------|--------|--------|-------|-------|-------|-------|-----|--------|----------|---------|-------------|--------------|-----------|
|                          | Male   | Female | 18-24 | 25-34 | 35-44 | 45-54 | 55+ | Dublin | Leinster | Munster | Conn/ulster | ABC1 F50+    | C2DE F50- |
| 0 or less than 1 KM   1% | 1%     | 2%     | 5%    | *     | *     | 1%    | 2%  | *      | 2%       | 1%      | 3%          | 1%           | 1%        |
| 1 to 5 KM   27%          | 25%    | 29%    | 36%   | 29%   | 22%   | 23%   | 29% | 28%    | 22%      | 28%     | 32%         | 27%          | 27%       |
| 6 to 10 KM   20%         | 18%    | 22%    | 24%   | 19%   | 19%   | 21%   | 21% | 32%    | 15%      | 17%     | 14%         | 22%          | 19%       |
| 11 to 20 KM   20%        | 21%    | 20%    | 21%   | 23%   | 21%   | 23%   | 15% | 23%    | 15%      | 26%     | 15%         | 19%          | 21%       |
| 21 to 30 KM   9%         | 9%     | 8%     | 0     | 8%    | 14%   | 9%    | 8%  | 7%     | 10%      | 11%     | 7%          | 10%          | 8%        |
| 31 to 40 KM   7%         | 6%     | 8%     | 14%   | 6%    | 6%    | 6%    | 7%  | 2%     | 14%      | 6%      | 6%          | 6%           | 8%        |
| 41 to 50 KM   4%         | 6%     | 3%     | 0     | 4%    | 5%    | 3%    | 7%  | 2%     | 9%       | 3%      | 4%          | 5%           | 3%        |
| 51 to 60 KM   1%         | 2%     | 1%     | 0     | 3%    | 1%    | 1%    | 1%  | 1%     | 2%       | *       | 3%          | 2%           | *         |
| 61 to 70 KM   1%         | 1%     | 1%     | 0     | 1%    | 1%    | 2%    | 1%  | *      | 2%       | 1%      | 2%          | 1%           | 2%        |
| 71 to 80 KM   1%         | 1%     | 1%     | 0     | 1%    | 1%    | *     | 2%  | 0      | 2%       | 0       | 3%          | 1%           | 1%        |
| 81 to 90 KM   0          | *      | *      | 0     | 0     | 1%    | 1%    | 0   | 0      | 1%       | *       | *           | *            | 0         |
| 91 to 100 KM   2%        | 3%     | 1%     | 0     | 3%    | 2%    | 2%    | 1%  | 1%     | 2%       | 2%      | 2%          | 1%           | 2%        |
| 101 + KM   2%            | 3%     | 1%     | 0     | 1%    | 3%    | 4%    | 1%  | *      | 2%       | 2%      | 5%          | 2%           | 1%        |
| NA or DK   3%            | 4%     | 2%     | 0     | 2%    | 4%    | 5%    | 3%  | 3%     | 2%       | 3%      | 4%          | 1%           | 5%        |



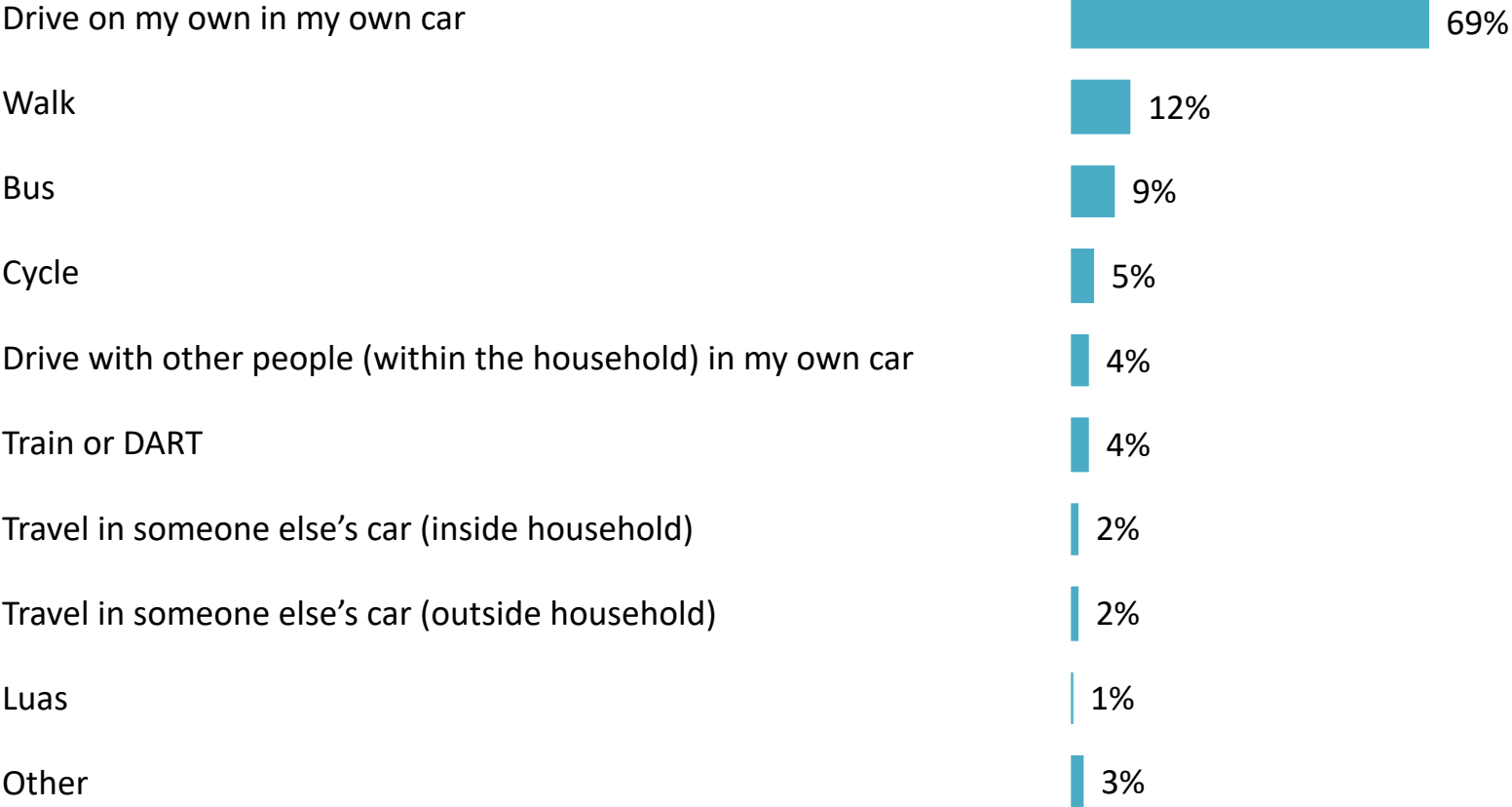
# Sixty percent of those working outside the home commute for 30 minutes or less. The comparable figure for Dublin is 51%.

(BASE : All that worked outside the home – 1388)

|                   |     | GENDER |        | AGE   |       |       |       |     | REGION |          |         |                 | SOCIAL CLASS |              |
|-------------------|-----|--------|--------|-------|-------|-------|-------|-----|--------|----------|---------|-----------------|--------------|--------------|
|                   |     | Male   | Female | 18-24 | 25-34 | 35-44 | 45-54 | 55+ | Dublin | Leinster | Munster | Conn/<br>ulster | ABC1<br>F50+ | C2DE<br>F50- |
| 0 minutes         | 0   | *      | 0      | 0     | 0     | 0     | 1%    | 0   | *      | 0        | 0       | 0               | 0            | *            |
| 1 to 5 minutes    | 10% | 9%     | 11%    | 16%   | 9%    | 7%    | 12%   | 11% | 4%     | 13%      | 11%     | 17%             | 8%           | 13%          |
| 6 to 10 minutes   | 10% | 10%    | 11%    | 12%   | 6%    | 13%   | 10%   | 12% | 8%     | 10%      | 14%     | 11%             | 10%          | 11%          |
| 11 to 20 minutes  | 25% | 22%    | 27%    | 42%   | 25%   | 22%   | 24%   | 20% | 23%    | 24%      | 30%     | 23%             | 23%          | 27%          |
| 21 to 30 minutes  | 15% | 15%    | 16%    | 8%    | 18%   | 16%   | 16%   | 15% | 18%    | 12%      | 20%     | 9%              | 17%          | 13%          |
| 31 to 40 minutes  | 11% | 10%    | 11%    | 7%    | 12%   | 13%   | 10%   | 10% | 12%    | 9%       | 11%     | 10%             | 11%          | 11%          |
| 41 to 50 minutes  | 8%  | 8%     | 7%     | 2%    | 10%   | 7%    | 6%    | 10% | 13%    | 6%       | 4%      | 5%              | 10%          | 5%           |
| 51 to 60 minutes  | 6%  | 6%     | 6%     | 5%    | 7%    | 7%    | 6%    | 7%  | 8%     | 8%       | 3%      | 8%              | 8%           | 5%           |
| 61 to 70 minutes  | 3%  | 3%     | 2%     | 6%    | 2%    | 3%    | 2%    | 1%  | 1%     | 4%       | 2%      | 4%              | 2%           | 3%           |
| 71 to 80 minutes  | 3%  | 3%     | 2%     | 2%    | 2%    | 2%    | 3%    | 4%  | 3%     | 4%       | *       | 4%              | 4%           | 2%           |
| 81 to 90 minutes  | 4%  | 5%     | 2%     | 0     | 4%    | 3%    | 4%    | 5%  | 4%     | 6%       | 1%      | 2%              | 4%           | 4%           |
| 91 to 100 minutes | 1%  | 1%     | 1%     | 0     | 1%    | 1%    | 1%    | 1%  | 1%     | 1%       | 0       | 1%              | 1%           | 1%           |
| 101+ minutes      | 2%  | 2%     | 1%     | 0     | 2%    | 2%    | 2%    | 1%  | 1%     | 2%       | 2%      | 2%              | 2%           | 1%           |
| NA or DK          | 3%  | 4%     | 2%     | 0     | 2%    | 4%    | 2%    | 3%  | 3%     | 1%       | 3%      | 4%              | 2%           | 4%           |

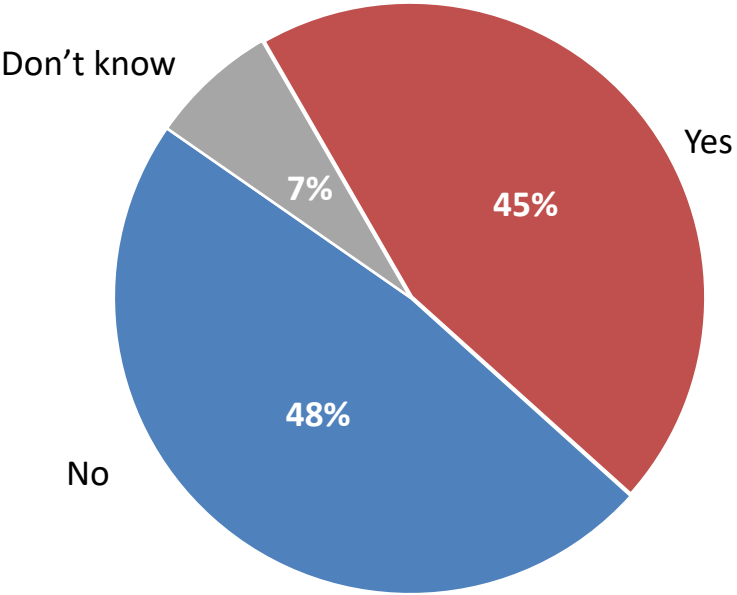
# Pre crisis – most workers commuted to work by car on their own

(BASE : All that worked outside the home – 1388)



# Almost half don't have an alternative means of getting to work

(BASE : All that worked outside the home – 1388)



### DEMOGRAPHICS FOR YES

Gender

Male 47%

Female 43%

Age

18-24 48%

25-34 47%

35-44 43%

45-54 42%

55+ 47%

Region

Dublin 54%

ROL 40%

Munster 43%

Conn/Ulster 41%

Social Class

ABC1F50+ 47%

C2DEF50- 43%



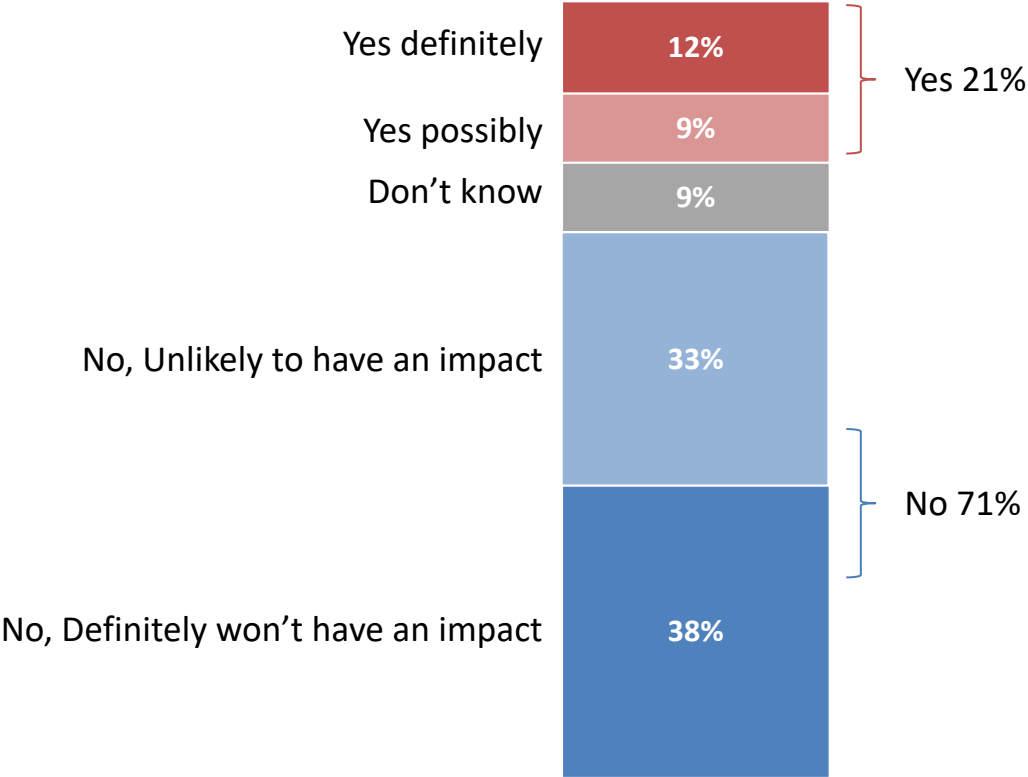
# Public Transport is vital for key demographic groups, particularly in Dublin

(BASE : All that worked outside the home – 1388)

|  | GENDER    |      |            | AGE        |            |       |       |     | REGION     |           |           |                 | SOCIAL CLASS |              |
|--|-----------|------|------------|------------|------------|-------|-------|-----|------------|-----------|-----------|-----------------|--------------|--------------|
|  | TOTAL     | Male | Female     | 18-24      | 25-34      | 35-44 | 45-54 | 55+ | Dublin     | Leinster  | Munster   | Conn/<br>ulster | ABC1<br>F50+ | C2DE<br>F50- |
| Drive on my own in my own car                                | 69%       | 74%  | 65%        | 34%        | 69%        | 72%   | 77%   | 77% | 55%        | 74%       | 75%       | 77%             | 67%          | 72%          |
| Walk   | 12%       | 10%  | 15%        | 19%        | 12%        | 10%   | 10%   | 13% | 13%        | 12%       | 13%       | 10%             | 13%          | 12%          |
| Bus  | <b>9%</b> | 6%   | <b>12%</b> | <b>26%</b> | <b>13%</b> | 5%    | 6%    | 4%  | <b>17%</b> | <b>7%</b> | <b>5%</b> | <b>3%</b>       | <b>9%</b>    | <b>9%</b>    |
| Cycle  | 5%        | 6%   | 4%         | 12%        | 3%         | 4%    | 5%    | 3%  | 7%         | 3%        | 5%        | 3%              | 5%           | 4%           |
| Drive with other people (within the household) in my own car | 4%        | 2%   | 6%         | 9%         | 3%         | 4%    | 3%    | 3%  | 2%         | 3%        | 8%        | 3%              | 5%           | 3%           |
| Train or DART  | <b>4%</b> | 3%   | 4%         | <b>5%</b>  | <b>6%</b>  | 3%    | 3%    | 2%  | <b>7%</b>  | 4%        | *         | 2%              | 5%           | 3%           |
| Travel in someone else's car (inside household)              | 2%        | 1%   | 2%         | 5%         | 2%         | 1%    | 1%    | *   | <b>1%</b>  | 1%        | 1%        | 4%              | 2%           | 1%           |
| Travel in someone else's car (outside household)             | 2%        | 2%   | 3%         | 8%         | 2%         | 2%    | 1%    | 2%  | 2%         | 3%        | 3%        | 3%              | 2%           | 3%           |
| Luas   | <b>1%</b> | 1%   | 1%         | 0          | 2%         | 2%    | 1%    | 1%  | <b>4%</b>  | <b>1%</b> | 0         | 0%              | 2%           | *            |
| Other  | 3%        | 5%   | *          | 0          | *          | 4%    | 4%    | 5%  | 4%         | 2%        | 2%        | 3%              | 1%           | 5%           |

# One in five workers believe that they will be impacted by travel restrictions after Covid

(BASE : All that worked outside the home – 1388)



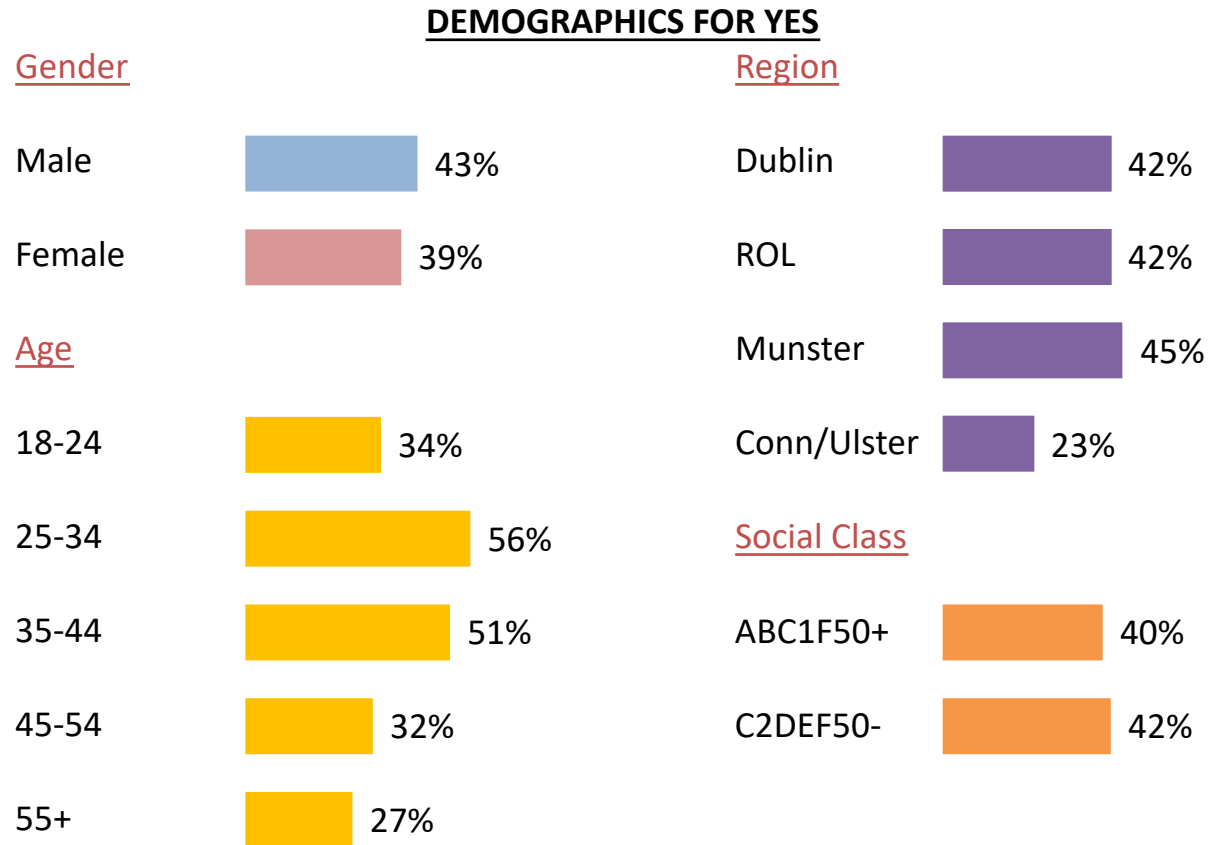
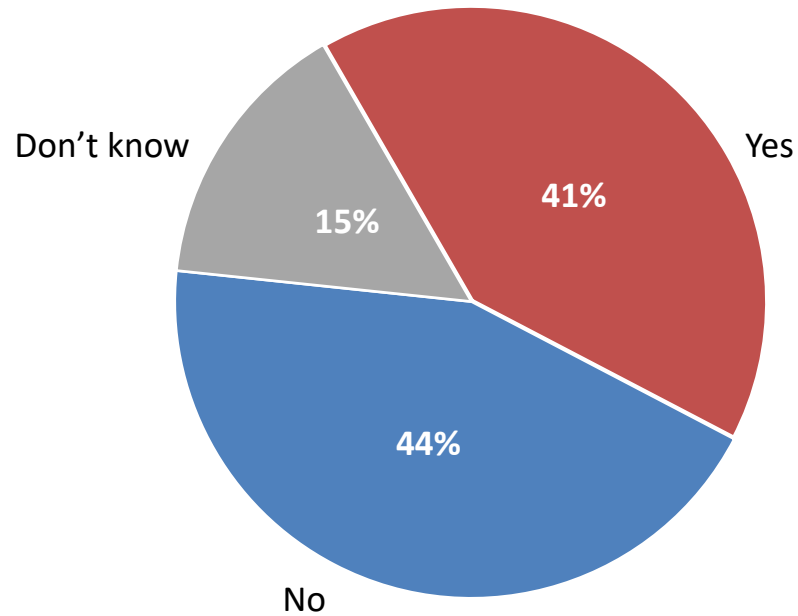
## ... with a very strong impact in Dublin

(BASE : All that worked outside the home – 1388)

|                                     | GENDER |      |        | AGE        |       |       |       |     | REGION     |          |         |                 | SOCIAL CLASS |              |
|-------------------------------------|--------|------|--------|------------|-------|-------|-------|-----|------------|----------|---------|-----------------|--------------|--------------|
|                                     | TOTAL  | Male | Female | 18-24      | 25-34 | 35-44 | 45-54 | 55+ | Dublin     | Leinster | Munster | Conn/<br>ulster | ABC1<br>F50+ | C2DE<br>F50- |
| Yes definitely                      | 12%    | 12%  | 11%    | <b>18%</b> | 12%   | 10%   | 11%   | 12% | <b>18%</b> | 13%      | 7%      | 6%              | 12%          | 11%          |
| Yes possibly                        | 9%     | 9%   | 10%    | <b>17%</b> | 11%   | 8%    | 11%   | 5%  | <b>15%</b> | 7%       | 9%      | 5%              | 11%          | 8%           |
| Dont know                           | 9%     | 8%   | 9%     | 17%        | 8%    | 8%    | 4%    | 10% | 6%         | 10%      | 10%     | 9%              | 6%           | 12%          |
| No, Unlikely to have an impact      | 33%    | 35%  | 30%    | 9%         | 33%   | 35%   | 36%   | 37% | 34%        | 30%      | 32%     | 35%             | 33%          | 32%          |
| No, Definitely won't have an impact | 38%    | 36%  | 39%    | 40%        | 36%   | 39%   | 38%   | 36% | 28%        | 40%      | 42%     | 44%             | 38%          | 37%          |

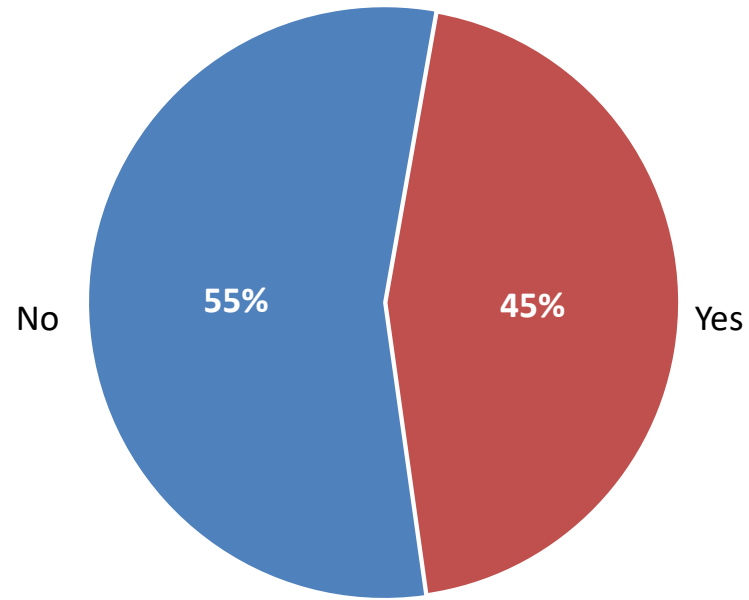
# And it will impact on return to work plans for a significant minority

(BASE : All those who said restrictions will have an impact – 295)



# Just under half of all respondents own a bicycle.

(BASE : All respondents – 2,043)

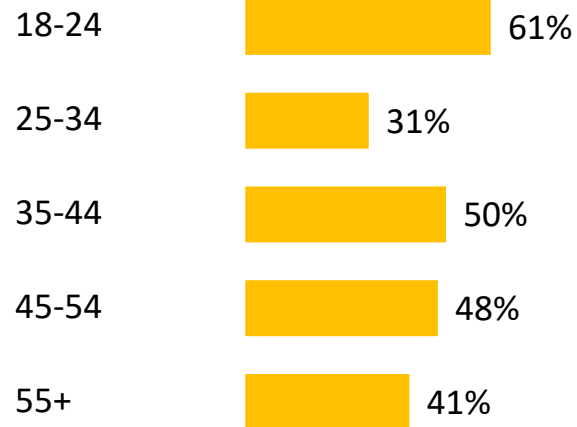


## DEMOGRAPHICS FOR YES

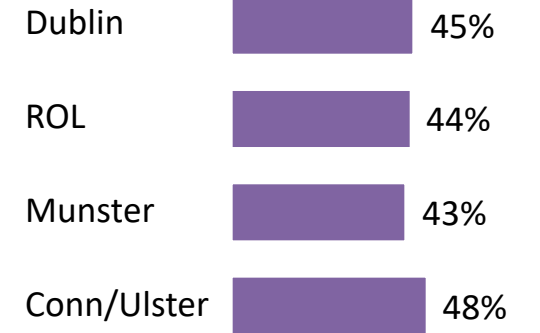
### Gender



### Age



### Region

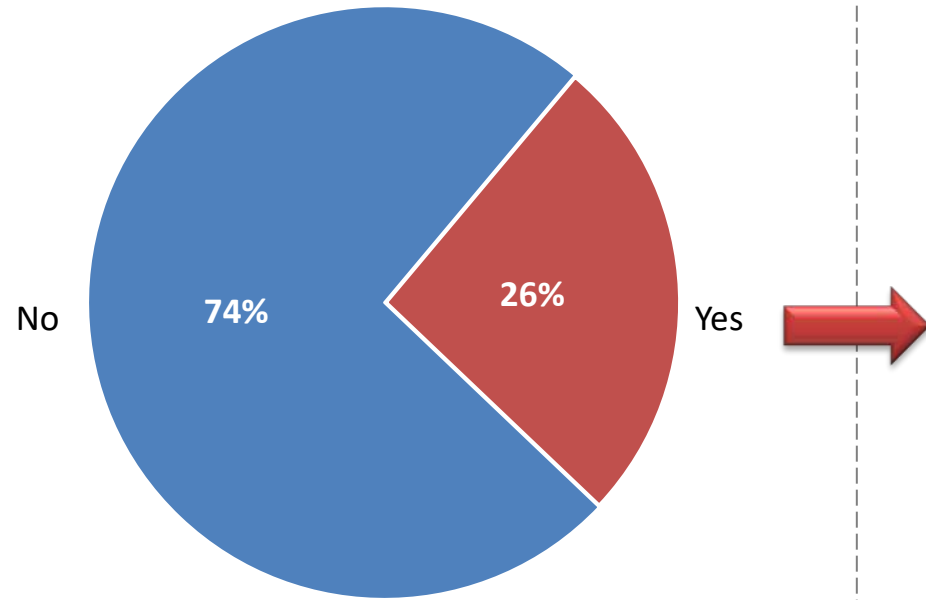


### Social Class



# And a quarter of those who don't own a bike are now considering buying one.

(BASE : All that do not own a bicycle – 1131)

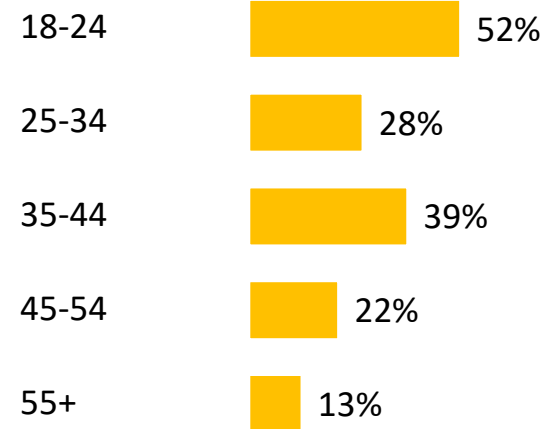


## DEMOGRAPHICS FOR YES

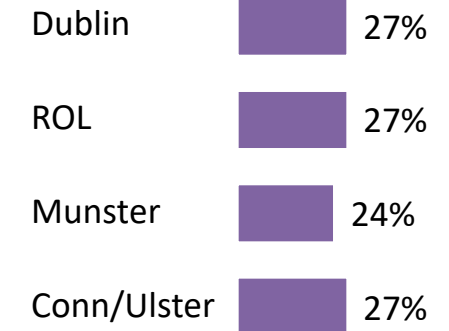
### Gender



### Age



### Region

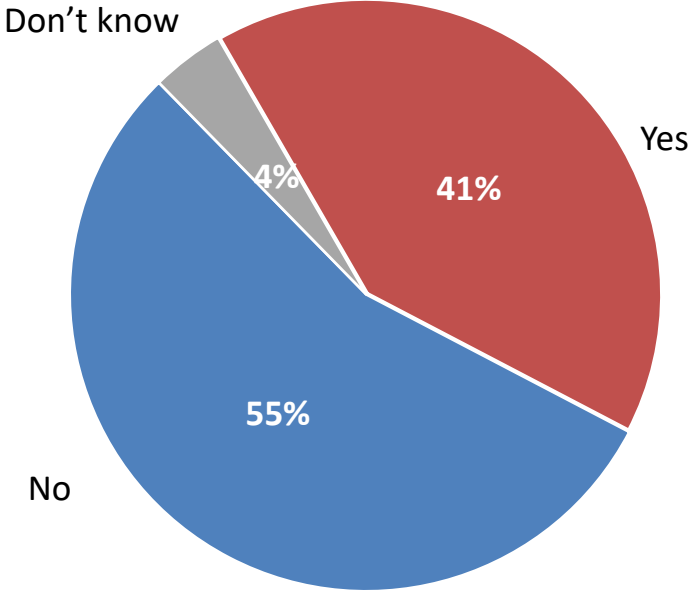


### Social Class



# Four in ten say that they could cycle to work.

(BASE : All that worked outside the home – 1388)

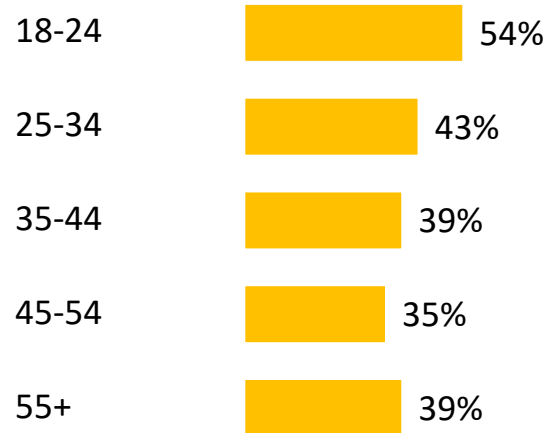


## DEMOGRAPHICS FOR YES

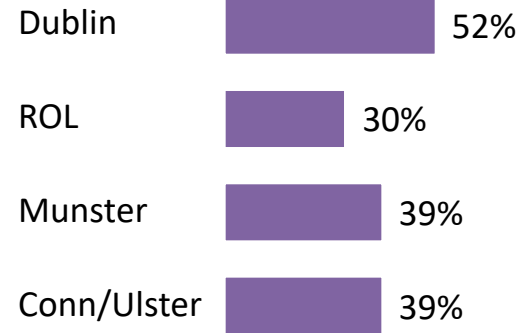
### Gender



### Age



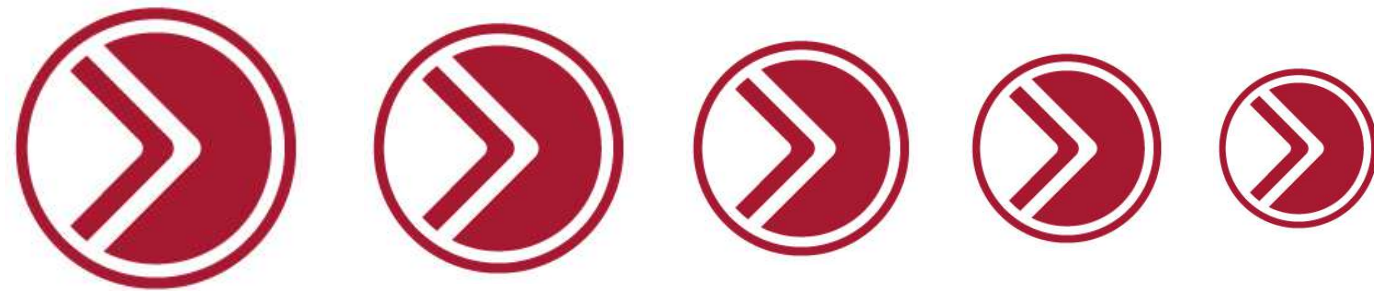
### Region



### Social Class



# Insights and Implications





# Implications – in a Covid context

- The vast majority of those working outside the home are commuting on their own by car to work. The challenge of infrastructure pressures remains – as the switch to public transport will be paused by reasons of risk and availability.
- There remains a key challenge in a post lockdown phase
  - Those who use public transport will have limited options available.
  - For many in Dublin (one third) restrictions will have an impact on the return to work.
- Unsurprisingly there is also an impact on younger members of the workforce. We know from previous work that we have done on attitudes to working from home that this age cohort are among those who are most keen to return to the workplace.
- We asked the questions on bicycle ownership because of anecdotal stories and personal experience of trying to buy one for a family member last weekend. For some with a shorter commute, it may be a solution. But it will require some recalibration of transport infrastructure.

S T A Y

S A F E

e. [info@amarach.com](mailto:info@amarach.com)

t. 01 410 5200

w. [www.amarach.com](http://www.amarach.com)

b. [www.amarach.com/blog](http://www.amarach.com/blog)

Tw. [twitter.com/AmarachResearch](https://twitter.com/AmarachResearch)

s. [slideshare.net/amarach/](https://slideshare.net/amarach/)