GWI

Coronavirus Research | March 2020

Series 2: Travel & Commuting

Contents

Introduction

As the coronavirus outbreak continues, more and more communities, industries, and businesses are feeling its effects. Staying informed at this time is crucial.

At GlobalWebIndex, we're tracking these effects across different sectors through a focused content series. In this whitepaper, we're releasing our second series dataset, collected between March 13-16th in the U.S. and UK, dedicated to the travel and transportation industries. Recent recommendations – as well as restrictions – by both local and national governments have made these industries some of the hardest hit by this crisis in the immediate term.

In this research we explore how consumers are feeling, reacting, and changing their behaviors for both routine travel, such as commuting, and leisure-based travel.

We'll be following this with further releases, exploring the impact of Coronavirus on additional sectors and on consumer behaviors more generally, as well as keeping track of how sentiments and concerns are shifting.

NOTE: All stats in this report are from a GlobalWebIndex March 2020 custom survey among 1,628 (U.S.) and 1,509 (UK) internet users aged 16-64.

Audience Definitions:

Generations:

- **Gen Z – 16-23 years-old**
- **Millennials – 24-37 years-old**
- **Gen X – 38-56 years-old**
- **Baby boomers – 57-64 years-old**

Income (based on annual household income):

- **Lower income (U.S.) – $32,000 or less**
- **Higher income (U.S.) – $85,000 or more**

- **Lower income (UK) – £24,000 or less**
- **Higher income (UK) – £60,000 or more**

General perceptions on outbreak

Most consumers in the U.S. and UK are taking a more grounded approach to their overall perceptions of the outbreak and health crisis. **Staying informed and up-to-date with global news** are considered the most important steps to take. **40% of consumers across the U.S. and UK are maintaining a positive outlook** on the situation, despite the doom and gloom that often dominates the media landscape. Positivity increases with age, and as concern is higher among younger people, having a positive outlook is higher among older people. About **1 in 5 people trust their government to handle the situation**, but dips as low as **11% for Gen Zs**. Those who travel, especially abroad, place a **higher trust in their government** when it comes to this crisis.

Urban context has a major impact on how people perceive the crisis. Generally speaking, the less urban the surroundings, the less concerned people are – 27% of rural internet users are worried that people and governments are overreacting, compared to 21% of urban dwellers.

% who agree with the following statements

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
It's important to be well informed about things	57%	58%	53%	45%	55%	64%	60%
I'm maintaining a positive attitude on the situation	40%	41%	36%	36%	36%	43%	49%
I'm more health-conscious now	35%	37%	26%	33%	39%	37%	26%
I'm now more aware of global news / events	34%	34%	30%	31%	37%	38%	18%
I regularly stay in touch with friends and family	32%	33%	26%	19%	30%	40%	29%
I worry about other people more than myself	29%	27%	39%	28%	31%	30%	27%
I'm worried that people / governments are overreacting to the virus	24%	24%	22%	31%	20%	23%	27%
It's already too late to stop the spread of the virus	21%	18%	36%	21%	21%	19%	25%
I trust my government to handle the situation	20%	21%	16%	11%	23%	22%	20%
I'm now more anxious about going outside	19%	18%	26%	20%	20%	19%	20%
I now appreciate my friends / family more	18%	19%	11%	16%	23%	17%	10%
I don't know what to think	5%	5%	5%	5%	4%	7%	4%

	Vacation Abroad	Vacation Domestically	Urban	Suburban	Rural	Public Transit Users	Drivers
It's important to be well informed about things	55%	60%	56%	60%	52%	53%	59%
I'm now more aware of global news / events	42%	40%	35%	36%	25%	37%	35%
I'm more health-conscious now	42%	40%	39%	35%	27%	41%	36%
I'm maintaining a positive attitude on the situation	40%	41%	38%	43%	39%	35%	41%
I regularly stay in touch with friends and family	37%	36%	30%	37%	24%	29%	34%
I trust my government to handle the situation	28%	24%	23%	21%	13%	22%	21%
I worry about other people more than myself	28%	28%	26%	32%	29%	23%	30%
I now appreciate my friends / family more	26%	22%	23%	14%	17%	22%	19%
I'm now more anxious about going outside	20%	20%	20%	19%	19%	20%	19%
I'm worried that people / governments are overreacting to the virus	20%	22%	21%	25%	27%	21%	25%
It's already too late to stop the spread of the virus	20%	20%	19%	22%	23%	21%	21%
I don't know what to think	2%	3%	4%	5%	8%	4%	4%

Question: Which of the following statements best describe you / your feelings on COVID-19?

Disruptions to travel

At the time of research, about **50% of U.S. consumers and 38% of UK consumers report that they voluntarily cancelled, voluntarily delayed, or were forced to cancel vacation plans** due to the coronavirus and ensuing crisis. 35% of consumers in both markets reported not planning for any travel to begin with, and only 15% in the U.S. and 27% in the UK said that their travel plans were not actually disrupted.

Expectedly, those who travel abroad frequently faced the greatest level of disruption of their plans. Among millennials, **the number of people who report they were forced to change their travel plans because of government or airline restrictions is nearly as high as the number who voluntarily cancelled.** This is not the case for Gen Zs or Gen Xs, who are more likely to take it upon themselves to cancel travel, and may be reflective of the "cheap holiday" trend that many millennials on social media were jumping on in the early days of the outbreak.

% who say the coronavirus outbreak led them to do the following

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
Voluntarily cancel a vacation you'd already booked	24%	27%	8%	26%	32%	21%	7%
Delay booking a vacation	21%	20%	27%	22%	19%	24%	19%
Forced you to cancel a vacation you'd already booked	18%	20%	11%	16%	29%	15%	5%

	Vacation Abroad	Vacation Domestically	Higher Income	Lower Income
Voluntarily cancel a vacation you'd already booked	41%	32%	34%	17%
Delay booking a vacation	32%	28%	21%	19%
Forced you to cancel a vacation you'd already booked	38%	25%	26%	19%

Question: Has the coronavirus outbreak led you to do any of the following?

Alternative expenditure of travel funds

The majority of consumers are being frugal with their travel funds, with **over 4 in 10 of both U.S. and UK internet users** reporting that they are opting to save the money they would have spent on traveling. Frugality is especially important for millennials and Gen Xs, while Gen Zs are seeking to shift that money into other purchases. A promising result for the travel and tourism industries is that, after saving some cash, the second most popular way to shift these funds is into re-booking travel at a later date. **A recovery of the industry is not out of the question, as demand for travel will still be there.**

% of vacation cancelers/delayers who say they'll use the freed-up vacation money in the following ways

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers*
Save it	43%	43%	46%	34%	43%	50%	-
Re-book my vacation to another date	33%	33%	33%	17%	40%	33%	-
Spend it on other purchases	25%	27%	15%	51%	24%	13%	-
Spend it on a vacation in my own country ("staycation")	14%	13%	15%	12%	17%	9%	-
Spend it on day trips	12%	12%	10%	12%	12%	11%	-
I haven't decided yet	10%	10%	9%	9%	4%	16%	-
Spend it on a wellness / spa day	10%	10%	8%	14%	14%	4%	-
Other	3%	2%	3%	3%	1%	4%	-

	Vacation Abroad	Vacation Domestically	Higher Income	Lower Income
Save it	41%	44%	46%	39%
Re-book my vacation to another date	35%	34%	25%	35%
Spend it on other purchases	28%	26%	19%	29%
Spend it on a vacation in my own country ("staycation")	16%	13%	18%	9%
Spend it on day trips	15%	12%	13%	7%
Spend it on a wellness / spa day	12%	10%	14%	5%
I haven't decided yet	8%	9%	15%	7%
Other	2%	2%	3%	2%

Question: Which of the following will you be doing with the money you were planning to invest in your vacation?

*Insufficient sample size

Sources of information for travel planning (UK)

Among UK internet users, the NHS emerges as the top source of information around the coronavirus for travel planning. **Younger consumers are especially trusting of this public health body, while older consumers prefer more traditional news outlets like the BBC**. The NHS is also favored by those with a lower income level, while traditional news sources top the list for international travelers and those with a higher income.

% in the UK who say they use the following sources for advice on foreign travel during the coronavirus outbreak

	All (UK)	Gen Z	Millennials	Gen X	Boomers
NHS	31%	38%	36%	29%	17%
News sources / outlets (e.g. BBC)	29%	22%	30%	32%	27%
World Health Organization	23%	26%	29%	20%	15%
Public Health England	20%	20%	24%	20%	15%
Foreign & Commonwealth Office	15%	20%	16%	15%	10%
Medical websites	11%	16%	13%	11%	2%
Airlines (e.g. via their social media / website / app)	11%	12%	13%	10%	9%
Health professional(s)	11%	11%	12%	11%	5%
Trending posts on social media	10%	18%	10%	7%	5%
Travel guides / websites (e.g. Lonely Planet)	7%	10%	8%	6%	5%
Travel agents	6%	5%	5%	7%	7%
Booking websites (e.g. Booking.com / Expedia / Skyscanner)	6%	6%	7%	5%	7%
Hotels / resorts (e.g. via their social media / website / app)	6%	6%	6%	6%	5%
Social media influencers	5%	8%	7%	4%	2%
Other	2%	2%	2%	3%	0%
None of the above	34%	25%	28%	38%	49%

	Vacation Abroad	Vacation Domestically	Higher Income	Lower Income
News sources / outlets (e.g. BBC)	38%	32%	46%	25%
NHS	35%	33%	39%	30%
World Health Organization	31%	28%	41%	21%
Public Health England	25%	24%	33%	20%
Foreign & Commonwealth Office	24%	19%	32%	12%
Airlines (e.g. via their social media / website / app)	19%	13%	26%	7%
Medical websites	14%	14%	17%	9%
Health professional(s)	14%	13%	16%	10%
Trending posts on social media	12%	11%	10%	9%
Travel guides / websites (e.g. Lonely Planet)	11%	9%	8%	6%
Travel agents	10%	7%	12%	5%
Booking websites (e.g. Booking.com / Expedia / Skyscanner)	10%	8%	8%	6%
Hotels / resorts (e.g. via their social media / website / app)	9%	8%	13%	5%
Social media influencers	8%	7%	7%	5%
Other	2%	3%	0%	3%
None of the above	18%	26%	16%	38%

Question: Which of the following sources, if any, have you looked at specifically for advice on foreign travel during the coronavirus outbreak?

Sources of information for travel planning (U.S.)

Unlike in the UK, **U.S. consumers are primarily looking toward an international health organization** – rather than their own governmental bodies – for travel advice around the coronavirus. This is especially evident among younger people, who are **looking to the WHO for guidance vs. the CDC**, while older consumers still primarily trust the CDC. This is a near-opposite effect to the trust in governmental health advice among young people in the UK, **and is reflective of larger issues of government credibility.**

% in the U.S. who say they use the following sources for advice on foreign travel during the coronavirus outbreak

	All (U.S.)	Gen Z	Millennials	Gen X	Boomers
World Health Organization	33%	31%	36%	38%	13%
CDC (Centers for Disease Control)	28%	23%	26%	34%	25%
News sources / outlets (e.g. CNN)	26%	24%	26%	31%	20%
Health professional(s)	25%	27%	31%	25%	5%
Medical websites	20%	19%	23%	21%	8%
The U.S. State Department	19%	11%	23%	23%	10%
NIH (National Health Institute)	15%	13%	20%	14%	4%
Trending posts on social media	13%	17%	17%	10%	6%
Airlines (e.g. via their social media / website / app)	10%	11%	15%	9%	2%
Social media influencers	10%	10%	15%	7%	2%
Travel agents	8%	8%	10%	8%	4%
Hotels / resorts (e.g. via their social media / website / app)	7%	6%	11%	5%	2%
Booking websites (e.g. Booking.com / Expedia / Skyscanner)	6%	8%	7%	6%	2%
Travel guides / websites (e.g. Lonely Planet)	6%	4%	8%	6%	3%
Other	4%	4%	4%	3%	7%
None of the above	31%	22%	23%	34%	53%

	Vacation Abroad	Vacation Domestically	Higher Income	Lower Income
World Health Organization	50%	40%	43%	31%
Health professional(s)	39%	31%	19%	28%
CDC (Centers for Disease Control)	34%	32%	35%	25%
News sources / outlets (e.g. CNN)	34%	31%	40%	23%
The U.S. State Department	30%	24%	30%	17%
Medical websites	29%	25%	18%	24%
NIH (National Health Institute)	24%	19%	11%	18%
Airlines (e.g. via their social media / website / app)	18%	14%	12%	9%
Trending posts on social media	17%	15%	13%	13%
Social media influencers	17%	12%	13%	9%
Travel agents	14%	11%	8%	8%
Booking websites (e.g. Booking.com / Expedia / Skyscanner)	11%	8%	9%	4%
Hotels / resorts (e.g. via their social media / website / app)	11%	9%	8%	4%
Travel guides / websites (e.g. Lonely Planet)	10%	8%	10%	5%
Other	4%	4%	2%	6%
None of the above	5%	19%	20%	33%

Question: Which of the following sources, if any, have you looked at specifically for advice on foreign travel during the coronavirus outbreak?

Influences for considering new travel

More than half of consumers in both the U.S. and UK could not be persuaded to travel at the time of research, and understandably so. However, the distribution of this attitude differs. **The older people get, the more likely they are to stay put**. For some Gen Zs, providing a comprehensive travel insurance policy may be enough to get them to reconsider their vacation plans, should restrictions lift in the near-term. Discounting and flexibility are also crucial. While not a consideration in the immediate term of the crisis, providing **discounting and flexibility on bookings may help the travel industry recover more quickly in the aftermath of the crisis**.

% who say the following would persuade them to book a vacation during the coronavirus outbreak

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
A travel insurance policy that covered disruption caused by the virus	17%	17%	20%	30%	16%	12%	17%
Flight discounts	16%	15%	20%	26%	17%	14%	7%
Flexibility	15%	14%	16%	17%	15%	12%	16%
Accommodation discounts	14%	13%	16%	19%	15%	12%	11%
Having a trip within my own country instead	13%	13%	16%	17%	15%	11%	12%
If the situation in my own country became worse	12%	13%	8%	12%	13%	11%	12%
No change fees	11%	11%	14%	14%	14%	9%	8%
Attraction discounts	11%	11%	9%	16%	13%	9%	4%
Being able to speak to an agent about safest / most effective travel plans	10%	11%	8%	16%	11%	5%	12%
I could not be persuaded to book a vacation during this time	**52%**	**53%**	**48%**	**33%**	**48%**	**62%**	**61%**

	Vacation Abroad	Vacation Domestically	Higher Income	Lower Income
A travel insurance policy that covered disruption caused by the virus	26%	21%	20%	16%
Flight discounts	19%	17%	24%	12%
Flexibility	19%	17%	20%	11%
If the situation in my own country became worse	16%	14%	13%	11%
Accommodation discounts	16%	15%	18%	10%
Being able to speak to an agent about safest / most effective travel plans	15%	12%	13%	10%
No change fees	14%	12%	17%	9%
Having a trip within my own country instead	13%	15%	18%	12%
Attraction discounts	12%	12%	14%	8%
I could not be persuaded to book a vacation during this time	**36%**	**46%**	**39%**	**56%**

Question: Which of the following, if any, would persuade you to book a vacation during the coronavirus outbreak?

Plans to revive travel

A crucial question for those in the travel industry is around when consumers are looking to revive their travel plans. On a positive note, **70% of consumers whose travel has been disrupted would look to plan another vacation within the next year**. While the global crisis is making near-term travel unlikely, people are still quite hopeful. **Over 40% of consumers in both markets want to try and book a vacation within the next six months**. **Millennials and international travelers are the most aggressive in their timeline**. Gen Zs are the group most likely to wait a year or longer, but likely for very different reasons. While boomers are likely to wait due to more serious health considerations of the virus, **travel planning may be a more volatile luxury for the young Gen Zs**, whose disposable income and job security is not what it is for older people. There is a sense of lost opportunity among them.

% of vacation cancelers/delayers who anticipate traveling again in the following time periods

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers*
In the next month	7%	8%	4%	5%	12%	2%	-
In 1-3 months	16%	15%	20%	17%	22%	8%	-
In 4-6 months	20%	18%	28%	14%	24%	19%	-
In 7-9 months	11%	11%	9%	6%	14%	10%	-
In 10-12 months	16%	17%	10%	14%	16%	21%	-
A year or more	16%	17%	9%	27%	8%	18%	-
Whenever restrictions are lifted	5%	4%	12%	6%	2%	8%	-
I don't know	9%	9%	9%	11%	3%	14%	-

	Vacation Abroad	Vacation Domestically	Higher Income	Lower Income
In the next month	9%	8%	14%	4%
In 1-3 months	19%	17%	12%	21%
In 4-6 months	21%	19%	24%	16%
In 7-9 months	9%	11%	10%	13%
In 10-12 months	14%	17%	17%	9%
A year or more	16%	16%	15%	17%
Whenever restrictions are lifted	4%	4%	6%	4%
I don't know	8%	8%	3%	16%

Question: You've said that you've cancelled or delayed a booking. How long do you think it will be before you look into having a vacation again?

*Insufficient sample

Changing public transportation behavior

Among consumers who take public transportation regularly (defined as multiple times a week or more), **over a third report having reduced or stopped this behavior entirely at the time of research**. For urbanites, who rely on public transit more heavily, this is higher. For Gen Zs and for U.S. consumers, this is higher, as well. We expect this behavior to have declined even further at this point in time.

% of public transportation users who say they're using it more often/the same/less often since the coronavirus outbreak

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers*
A lot more often	12%	14%	3%	6%	18%	10%	-
A little more often	9%	10%	8%	10%	12%	6%	-
About the same as before	42%	38%	58%	38%	35%	44%	-
A little less often	16%	16%	18%	24%	14%	19%	-
A lot less often	13%	13%	9%	10%	16%	10%	-
I have stopped using public transportation entirely	8%	9%	4%	13%	5%	11%	-
NET reduced or stopped taking public transportation	**37%**	**38%**	**31%**	**47%**	**35%**	**40%**	-

	Urban	Suburban	Rural*	Higher Income	Lower Income
A lot more often	14%	11%	-	19%	4%
A little more often	7%	13%	-	17%	12%
About the same as before	38%	46%	-	24%	47%
A little less often	18%	16%	-	13%	19%
A lot less often	17%	7%	-	20%	9%
I have stopped using public transportation entirely	7%	7%	-	8%	10%
NET reduced or stopped taking public transportation	**42%**	**30%**	-	**40%**	**38%**

Question: Are you choosing to use public transportation less often, more often, or about the same as you did before the coronavirus outbreak?

*Insufficient sample

Alternatives to public transportation

Walking and driving alone are the main alternatives that are replacing public transportation for those who have cut back. **Carpooling is significantly less popular, though more so for the eco-conscious millennial cohort. Older consumers, as well as suburbanites, are more likely to report that they are reducing their travel overall** – and likely staying in more. This presents interesting questions as to **how much travel can realistically be reduced by necessity.** Younger people and those living in urban areas – groups that often overlap – may have less flexibility to stay put due to jobs that cannot be done remotely, or have shared living spaces and apartments that cannot support stockpiling. The other side of the equation, however, is the willingness of young, urban people to reduce travel due **to the detriment to their lifestyle**.

% of those using public transportation less often who say they're doing the following instead

	All	U.S.	UK	Gen Z*	Millennials	Gen X	Boomers*
Walking	43%	42%	51%	-	52%	39%	-
Driving alone	42%	45%	23%	-	50%	49%	-
Reducing my need to travel overall	39%	39%	37%	-	34%	46%	-
Riding a bike I own	30%	33%	13%	-	44%	24%	-
Carpooling	17%	18%	10%	-	29%	9%	-
Choosing to visit places more local to me	16%	16%	19%	-	15%	15%	-
Using a rideshare service	13%	13%	15%	-	11%	16%	-
Using a bike / scooter hiring service	11%	12%	6%	-	7%	21%	-
Taking a traditional taxi	10%	9%	14%	-	9%	10%	-
Other	5%	6%	5%	-	5%	5%	-
None of these	3%	2%	6%	-	3%	4%	-

	Urban	Suburban	Rural*	Higher Income*	Lower Income
Walking	49%	34%	-	-	37%
Driving alone	48%	29%	-	-	30%
Reducing my need to travel overall	37%	46%	-	-	38%
Riding a bike I own	34%	22%	-	-	22%
Carpooling	18%	15%	-	-	4%
Choosing to visit places more local to me	13%	26%	-	-	14%
Using a bike / scooter hiring service	12%	8%	-	-	14%
Using a rideshare service	12%	17%	-	-	13%
Taking a traditional taxi	11%	7%	-	-	11%
Other	3%	10%	-	-	7%
None of these	3%	3%	-	-	3%

Question: You mentioned you're taking public transportation less often than before. Which alternatives, if any, are you using rather than taking public transportation as you normally would?

*Insufficient sample

Changing driving behavior

Reducing driving is not nearly as high as reducing taking public transit, understandably so. **Only 1 out of 4 consumers across both markets report reducing or stopping their reliance on driving** in response to the health crisis. Urbanites, who likely rely on driving less, are more likely to stop doing so, while suburbanites and rural residents still very much need driving to get around.

% of drivers who say they're doing it more often/the same/less often since the coronavirus outbreak

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
A lot more often	8%	8%	5%	7%	14%	4%	0%
A little more often	8%	8%	8%	9%	9%	8%	6%
About the same as before	60%	57%	75%	45%	47%	71%	79%
A little less often	13%	14%	7%	23%	11%	11%	11%
A lot less often	10%	11%	4%	12%	17%	4%	2%
I have stopped driving entirely	2%	2%	2%	5%	2%	2%	2%
NET reduced or stopped driving	**24%**	**27%**	**13%**	**39%**	**30%**	**17%**	**15%**

	Urban	Suburban	Rural	Higher Income	Lower Income
A lot more often	12%	6%	2%	14%	5%
A little more often	9%	9%	5%	8%	9%
About the same as before	45%	69%	72%	55%	57%
A little less often	15%	12%	11%	14%	12%
A lot less often	17%	3%	9%	8%	14%
I have stopped driving entirely	3%	2%	2%	1%	3%
NET reduced or stopped driving	**35%**	**17%**	**22%**	**23%**	**30%**

Question: You mentioned that you travel by car frequently as part of your typical routine. Are you choosing to drive less often, more often, or about the same as you did before the coronavirus outbreak?

Alternatives to driving

For urbanites, it looks like **walking has replaced both public transit and driving as the main form of alternative travel** – aside from staying put overall. This presents interesting questions as to the geographic shift in patterns of movement and, therefore, consumption and purchasing, that may have lasting effects after the crisis. People may discover and find preference in businesses that are closer to their homes, and **there may be a revival in "staying local"** long after the practical need to do so wears away.

% who are driving less often who say they're doing the following instead

	All	U.S.	UK	Gen Z*	Millennials	Gen X	Boomers*
Reducing my need to travel overall (i.e. working from home or not going to events)	54%	54%	48%	-	59%	61%	-
Walking	32%	31%	36%	-	37%	37%	-
Riding a bike I own	19%	20%	8%	-	25%	25%	-
Choosing to visit places more local to me	11%	11%	6%	-	7%	8%	-
Using a rideshare service	10%	10%	8%	-	7%	8%	-
Taking a traditional taxi	8%	8%	4%	-	7%	4%	-
Using a bike / scooter hiring service	5%	5%	5%	-	3%	11%	-
Taking public transportation	3%	3%	7%	-	5%	3%	-
Other kind of transport	9%	9%	3%	-	15%	2%	-
None of the above	14%	14%	19%	-	7%	16%	-

	Urban	Suburban	Rural*	Higher Income	Lower Income
Reducing my need to travel overall	61%	45%	-	38%	56%
Walking	39%	25%	-	33%	18%
Riding a bike I own	29%	9%	-	20%	7%
Choosing to visit places more local to me	9%	10%	-	7%	9%
Using a rideshare service	8%	15%	-	14%	10%
Using a bike / scooter hiring service	8%	1%	-	3%	4%
Taking a traditional taxi	8%	6%	-	9%	8%
Taking public transportation	4%	4%	-	4%	2%
Other kind of transport	12%	5%	-	7%	3%
None of the above	9%	20%	-	16%	16%

Question: You mentioned you're driving less often than before. Which alternatives, if any, are you using rather than driving as you normally would?

*Insufficient sample size

Attitudes toward halting public transportation

At the time of research, the most extreme attitude of halting public transportation entirely has very limited support – **only about 1 out of 5 consumers across the U.S. and UK** feel that their local authorities should be taking this measure to curb the outbreak. The difference among income groups is most telling here. **About 1 out of 4 higher income consumers support halting public transit, while only 17% of lower income consumers think this way**. This points to the stark inequalities that outbreak measures such as this emphasize; public transportation is more essential to the way of life of lower income people, who often cannot rely on driving, working from home, or other alternatives for everyday living. Any shifts in sentiment toward halting public transportation are therefore most likely to have occurred among higher income groups.

% who say the following measures should be taken as part of a response to the coronavirus outbreak

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
Increase the cleaning of public transportation facilities	65%	65%	65%	61%	61%	69%	70%
Encourage people to reduce their use of public transportation	38%	38%	41%	36%	40%	39%	37%
Run public transportation on limited or modified schedules	21%	21%	17%	22%	24%	16%	22%
Stop running public transportation lines entirely	19%	20%	13%	27%	22%	15%	9%
I don't know	11%	11%	13%	7%	11%	11%	18%
None of these	6%	6%	6%	3%	5%	8%	6%

	Urban	Suburban	Rural	Higher Income	Lower Income
Increase the cleaning of public transportation facilities	63%	70%	59%	64%	61%
Encourage people to reduce their use of public transportation	36%	40%	39%	37%	33%
Stop running public transportation lines entirely	22%	14%	21%	22%	17%
Run public transportation on limited or modified schedules	22%	21%	19%	24%	17%
I don't know	12%	10%	14%	8%	16%
None of these	4%	5%	8%	6%	5%

Question: Which of the following measures, if any, do you think should be taken as part of a response to the coronavirus outbreak?

Increased at-home behaviors: media and commerce

With less travel and more time at home, **about two-thirds of consumers in both the U.S. and UK feel that their behavior toward media consumption and ecommerce has changed at least in some ways**. News dominates these behaviors, as we have seen in other questions. Entertainment is next, with linear TV being more popular than streaming at the moment. The difference here is more pronounced among older consumers, who are watching more linear TV at nearly double the rates as they're watching more online TV.

Millennials and Gen Z are using social media more and exercising more. **Millennials in particular are hitting the online stores and ordering takeout food at about nearly twice the rate of any other cohort.**

In terms of leisure and interest behaviors, household cleaning is what nearly all age groups are doing the most of. More so than individual hobbies or activities, **people are inclined to spend time with others and check-up on friends/family, emphasizing how the seriousness of the situation has rallied people around each other**. Music is an important outlet for younger consumers, especially Gen Zs, while **older consumers are more likely to report that they haven't changed much about their day-to-day living**.

The gaming trend among youth is evident here, as well, as more Gen Zs are reporting gaming more frequently than before vs. those who are reading, cooking, and dedicating time to learning.

% who say they are doing the following activities more often than before while at home

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
Reading more online news	38%	39%	31%	39%	47%	37%	16%
Watching more TV	36%	39%	25%	32%	42%	39%	23%
Cleaning my home more often	34%	36%	25%	35%	39%	35%	18%
Spending more quality time with my family	30%	33%	17%	26%	40%	29%	12%
Communicating with my friends / family more often	29%	32%	15%	27%	35%	30%	15%
Using social media more often	27%	29%	16%	32%	37%	23%	6%
Listening to more music	26%	28%	15%	35%	30%	23%	12%
Watching more online TV	24%	26%	14%	21%	34%	22%	10%
Buying more items online	20%	22%	13%	12%	26%	24%	3%
Cooking more	20%	22%	11%	18%	29%	16%	14%
Exercising more	17%	19%	7%	20%	22%	16%	5%
Reading more books	16%	17%	12%	20%	19%	14%	11%
Gaming more often	14%	15%	11%	21%	21%	8%	8%
Reading more print news	12%	13%	9%	8%	20%	11%	4%
Dedicating more time to learning	12%	13%	8%	20%	15%	9%	5%
Ordering more takeaways	11%	12%	5%	7%	20%	8%	1%
Working more often (longer than my expected hours)	8%	9%	5%	7%	12%	6%	4%
Other	6%	7%	3%	5%	6%	10%	3%
My behavior at home hasn't changed significantly	33%	30%	48%	28%	21%	36%	63%

Question: In light of the coronavirus outbreak, are you doing any of the following activities more often than before while at home?

www.globalwebindex.com

E hello@globalwebindex.com