

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 1 REPORT (SURVEY UNDERTAKEN BETWEEN 13TH AND 21ST JULY 2020)

nestrans

Smarter Choices, Smarter Places
Supporting Sustainable Travel

SYSTRA

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1. INTRODUCTION

1.1 Approach

1.1.1 Nestrans, in partnership with Aberdeen City and Aberdeenshire Council, with support from Paths for All, is conducting monthly travel behaviour and attitude surveys. The purpose of the research is to better understand changes occurring in the north east of Scotland during the current Covid-19 restrictions, and during the recovery period.

1.1.2 The travel behaviour and attitude surveys, administered by SYSTRA, are being delivered through an online panel, issued every month for 10 months, commencing July 2020, through to March 2021. Each survey wave will be with a different sample of respondents, however it is likely there will be overlap across the waves.

1.1.3 Comparisons made to the Scottish population are taken from Transport Scotland's Public Attitudes Survey.

1.2 This Report

1.2.1 This report covers the main findings from Wave 1 of 10 Waves. The data was collected between Monday 13th July to Tuesday 21st July 2020.

1.2.2 A total of 344 respondents took part in this survey wave. 52% of the sample were residents in Aberdeenshire and 48% residents of Aberdeen City. The data used in this report has been weighted to ensure the sample is representative of the Nestrans region by age and gender.

1.2.3 Any differences highlighted in the report between different demographic types and locations are statistically significant.

1.2.4 The guidelines for Covid-19 in the Wave 1 survey period included[1]:

- Mandatory face coverings on public transport and in shops;
- Outdoors: a household can meet up to 4 other households at a time, up to 15 people in total;
- Indoors: a household can meet up to 2 other households at a time, up to 8 people in total;
- Organised outdoor contact sports, play and physical activity, can resume for children and young people under 18 (subject to guidance);
- Non-essential shops inside shopping centres can re-open (following guidance and with physical distancing);
- Places of worship can re-open for congregational services, communal prayer and contemplation with physical distancing and limited numbers;
- Museums, galleries, monuments, libraries, various other visitor attractions, cinemas (including drive-ins and venues screening films) – with physical distancing and other measures;
- Easing of restrictions on attendance at funerals, marriage ceremonies and civil partnerships registrations, with physical distancing (limited numbers).

[1] Source: https://www.gov.scot/publications/coronavirus-covid-19-framework-decision-making-scotlands-route-map-through-out-crisis-phase-3-update/pages/8/

2. JOURNEYS IN THE LAST SEVEN DAYS

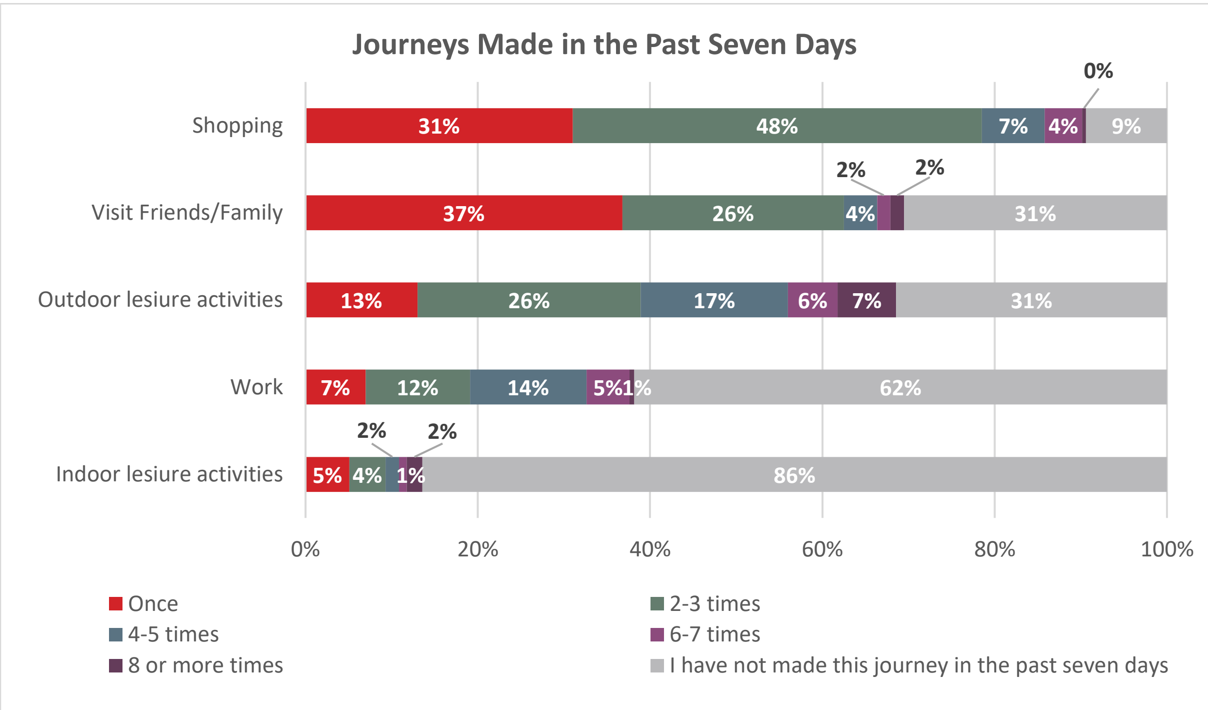
2.1 Journey Types

2.1.1 All respondents had made at least one journey in the last seven days. In the past seven days, the most frequently made trip was for shopping, with 91% of respondents making this trip, and four in five (79%) making this journey between one and three times.

2.1.2 Visiting friends and family, and taking part in outdoor leisure activities were journeys made by two-thirds of respondents (both 69%).

2.1.3 Around two in five respondents (38%) had made a journey to work in the last seven days. Respondents in Aberdeen City (25%) were more likely to have travelled for this purpose four or more times a week than those in Aberdeenshire (13%). Respondents in the Nestrans region were more likely to have made a journey to work compared to the Scottish population (20%).

2.1.4 Only 14% had taken part in an indoor leisure activity in the last seven days. This is unsurprising due to the current restrictions and guidelines around working from home, and ongoing closures of, for example, gyms.



2.1.5 If there were not any Covid-19 travel restrictions and guidance in place, respondents predicted that they would have made many more journeys in the past seven days. This includes:

- Double the number of average work trips;
- Double the number of average trips to visit friends and family; and
- Four times as many average trips for indoor leisure activities.

2.1.6 Respondents were similarly likely to predict shopping trips if restrictions were not in place, but predicted they would have made them more frequently. Predicted journeys for outdoor leisure activities were similar to those made.

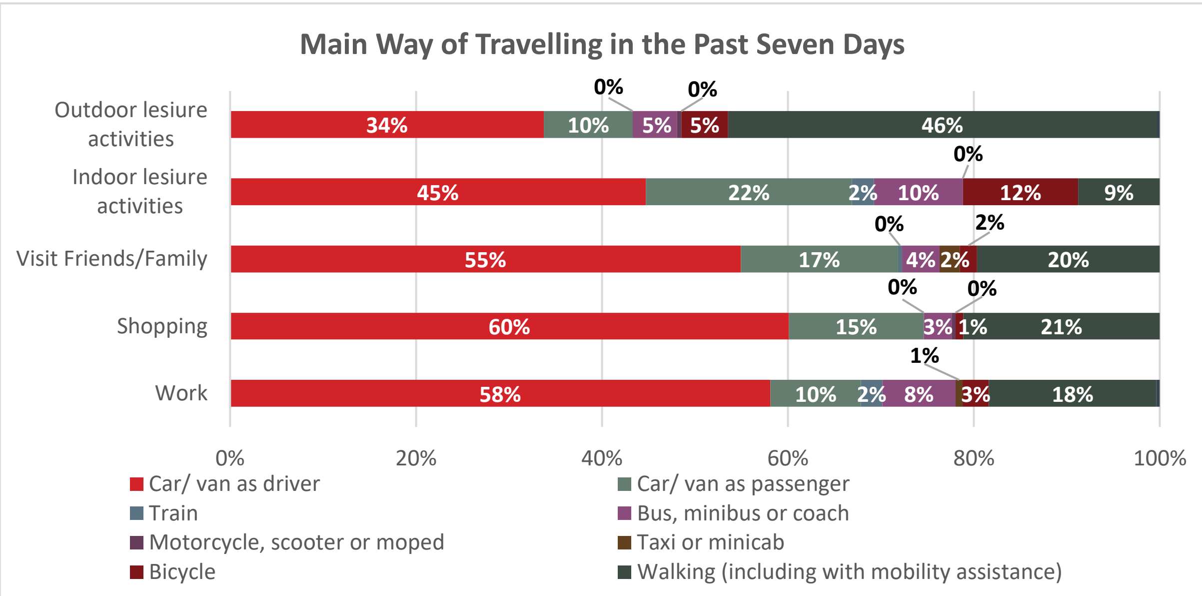
2.2 Ways of travelling

2.2.1 Travelling by car, as a driver or passenger, was the most frequently used way of travelling for all journey types, with the exception of journeys for outdoor leisure activities, where walking (41%) and cycling (5%) combined were more frequently used than the car (43%).

2.2.2 Respondents in the Nestrans region were similarly likely to have made their journey to work by car (68%) compared to the Scottish population (67%).

2.2.3 The main way of travelling does not vary much between the survey period and before Covid-19 restrictions were introduced. Differences include:

- A 3-5% drop in public transport use across commutes, shopping, visiting friends and family and indoor leisure activity trips;
- An increase in walking and cycling across all types of journeys from before Covid-19 restrictions, most noticeably for outdoor leisure activities (8% increase); visiting friends and family (5% increase) and for commutes (4% increase).



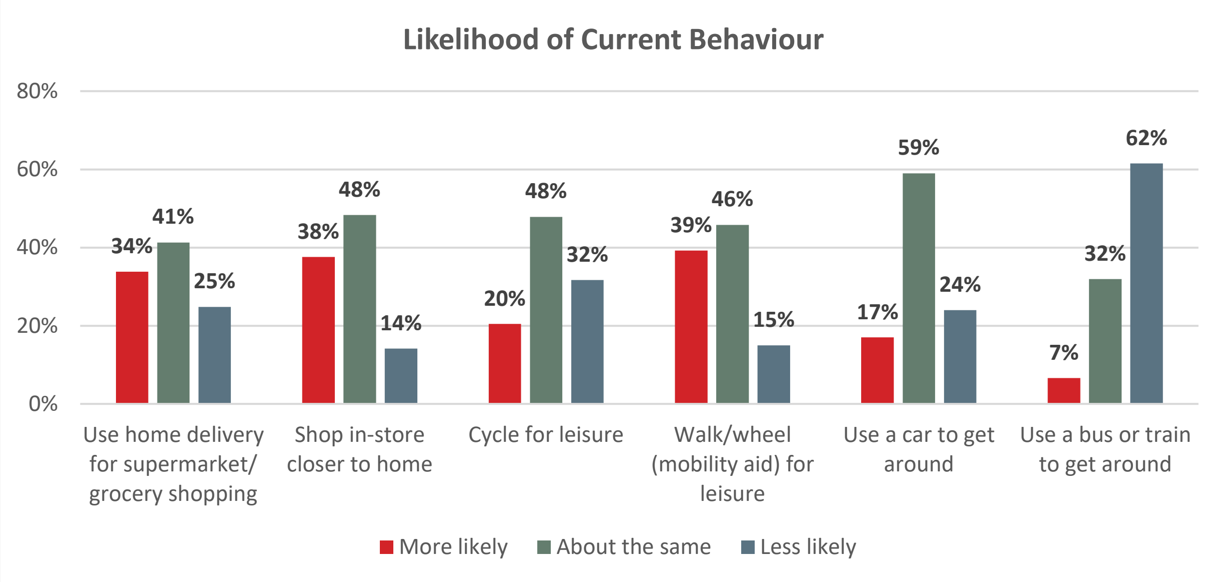
2.3 Changes in Current Behaviour

2.3.1 During the survey period, over a third of respondents reported that they were more likely to use home delivery for supermarket or grocery shopping (34%) and were more likely to shop closer to home (38%). This behaviour suggests a distinct change in shopping behaviour.

2.3.2 Respondents in the Nestrans region were more likely to use home delivery for supermarket shopping compared to the Scottish population (20%). Those in Aberdeen City (42%) were more likely to shop in a store closer to home than those in Aberdeenshire (33%).

2.3.3 Respondents also suggested they were more likely to engage in physical activity for leisure purpose than before the Covid-19 restrictions, with a fifth (20%) reporting that they were more likely to cycle for such purposes, and two fifths (39%) reporting they were more likely to walk or wheel.

2.3.4 Over three fifths (62%) of respondents reported that they were less likely to use a bus or train to get around, while only a quarter (24%) reported that they were less likely to use a car to get around.

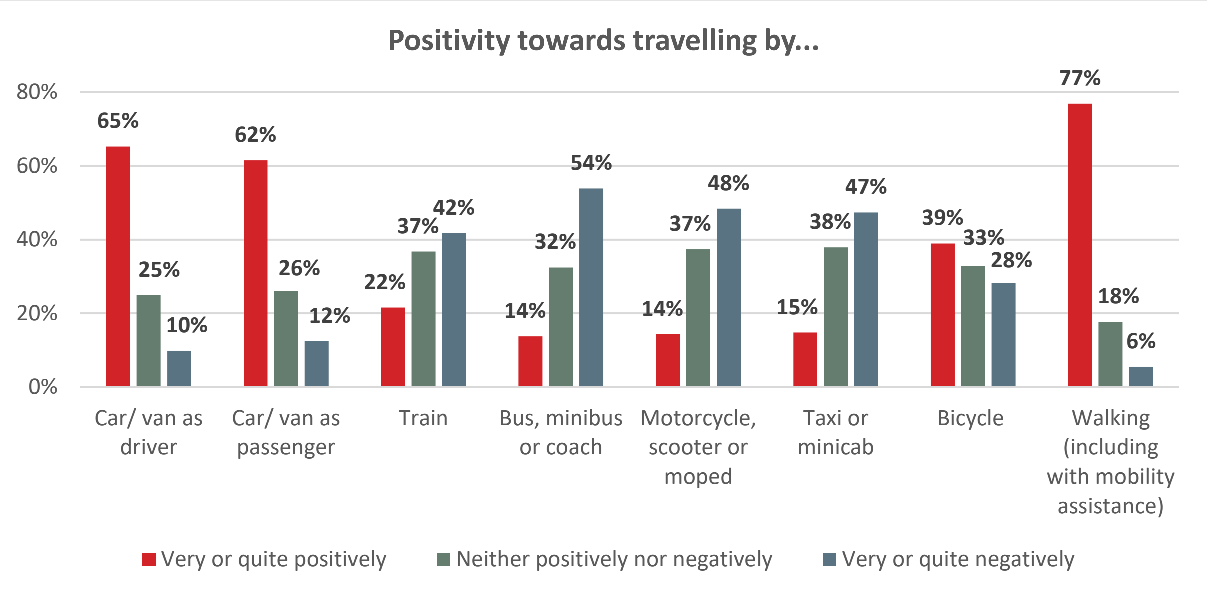


3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

3.1 Positivity and negativity towards travelling by different methods

3.1.1 Nearly two thirds of respondents felt positively towards travelling by car or van as a driver (65%) or passenger (62%). Over three quarters (77%) felt positively towards walking, while two fifths (39%) felt this way towards travelling by bicycle. Those in more urban areas (45%) were more likely to report feeling positive towards travelling by bicycle compared to those who live in more rural areas (32%).

3.1.2 Respondents generally reported that they felt negatively towards travelling by public transport. Over two fifths felt this way toward travelling by train (42%), while around half felt this way towards travelling by bus, minibus or coach (54%), and also by taxi or minicab (47%).



3.1.3 Of those who reported negative attitudes towards travelling by train, the most common reasons cited included:

- Concerns that social distancing may not be in place (53%);
- Concern over catching coronavirus/other illness (49%);
- Cost / too expensive (45%);
- Behaviour of other passengers (44%);
- Overcrowded (43%).

3.1.4 Of those who reported negative attitudes towards travelling by bus, reasons given included:

- Concern over catching coronavirus/other illness (54%);
- Concerns that social distancing may not be in place (52%);
- Behaviour of other passengers (47%);
- Travelling by car is easier / more convenient (45%);
- Lack of cleanliness on board (36%).

3.1.5 Almost two fifths (39%) of the Scottish population suggested that the risk of others still carrying Covid-19 was one of the reasons they will avoid using public transport and use their car instead.

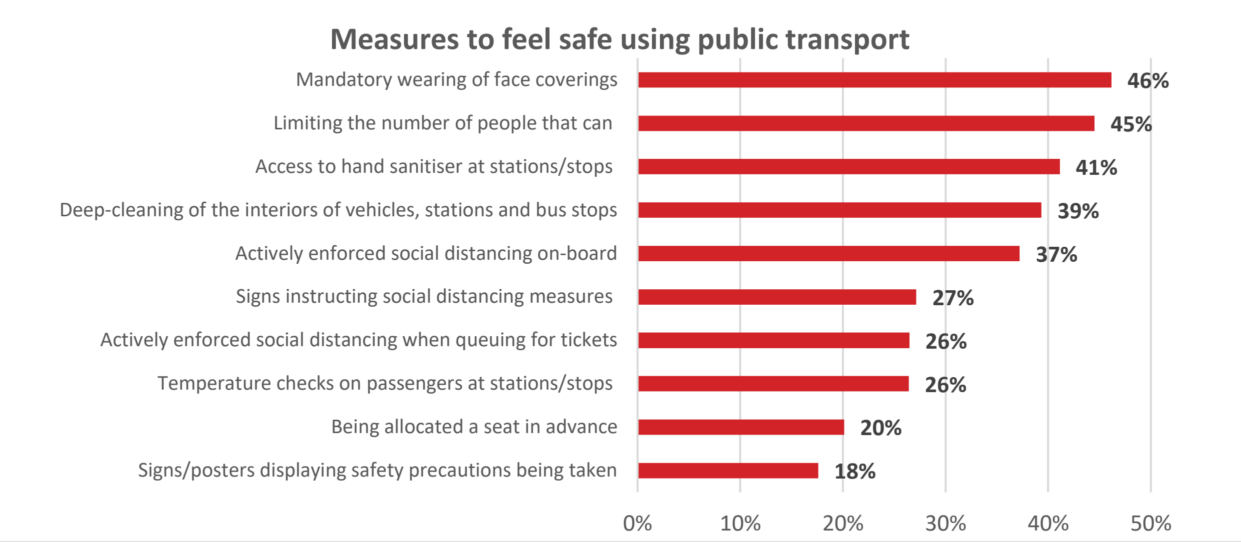
3.2 Current Safety Concerns and Measures

3.2.1 The majority of respondents were concerned about people spreading or contracting the virus whilst using:

- Public transport (72%);
- Taxis or minicabs (72%);
- Shared transport, including car clubs or car sharing (67%).

3.2.2 Almost half of all respondents reported that mandatory wearing of face coverings (46%) and limiting the number of people that can board public transport (45%) would make them feel safer when using public transport.

3.2.3 Two fifths reported that access to hand sanitiser (41%) and deep-cleaning of the interiors of vehicles, stations and bus stops (39%) would also make them feel safer.



3.2.4 Conversely, 17% suggested that no measures would make them feel safer to use public transport, while 10% reported that they already felt safe using public transport.

4. ANTICIPATED CHANGE IN BEHAVIOUR

4.1 Changes to walking and cycling

4.1.1 Since the Covid-19 restrictions, respondents reported increased levels of both walking and cycling. Whilst this increase has primarily been for leisure/exercise purposes (56% and 35% respectively), walking and cycling have also been used to replace journeys that normally would have been made another way (27% and 11% respectively).

4.1.2 Those in Aberdeen City (62%) were more likely to have increased the amount they walk for leisure/exercise purposed compared those in Aberdeenshire (50%).

4.1.3 Positively, the majority of respondents expect that they will maintain these increased levels of walking and cycling once Covid-19 restrictions are lifted. This would be primarily for leisure/exercise purposes (83% and 79% respectively) but also to replace journeys that could otherwise be made by another way (67% and 64% respectively).

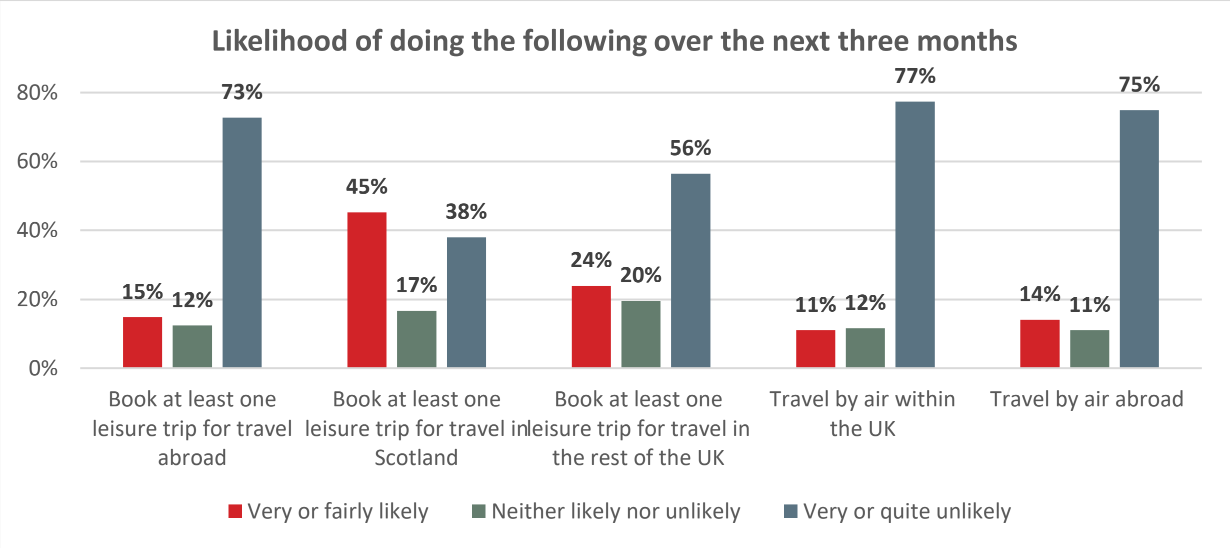
4.2 Travelling further afield

4.2.1 The majority of respondents did not anticipate changes to how much they travel in the next couple of weeks for: work (80%); shopping (71%); visiting friends and family (61%); indoor leisure activities (64%) or outdoor leisure activities (71%).

4.2.2 Similarly, respondents did not anticipate making journeys that would take them further afield. Around three quarters suggested that it was unlikely that they would book a leisure trip for travel abroad (73%); travel by air within the UK (77%); or travel by air abroad (75%).

4.2.3 There was more appetite for staying closer to home, however, as almost half (45%) did think it would be likely that they would book a leisure trip for travel in Scotland, compared to booking one in the rest of the UK (24%).

4.2.4 Similar results were found were found amongst the Scottish population.



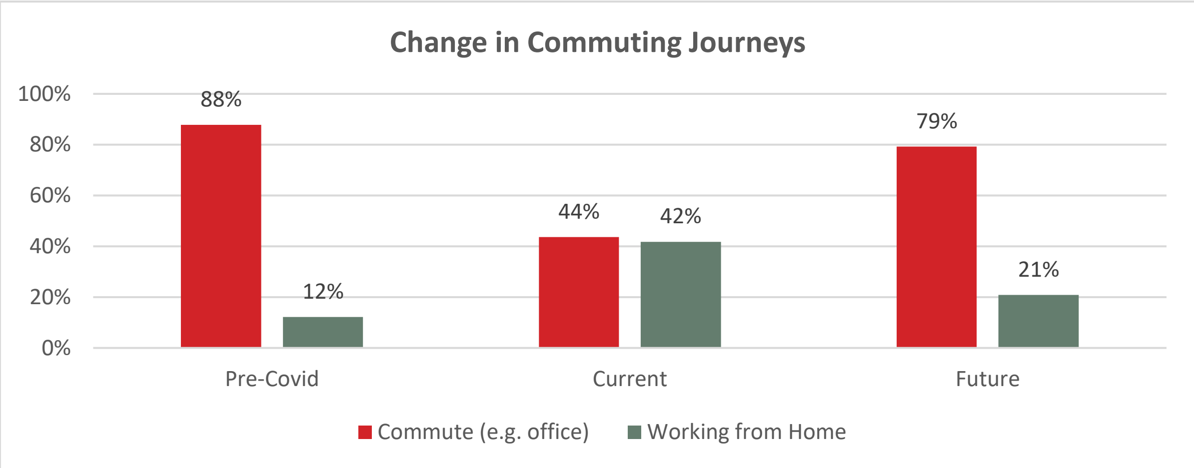
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting trips

5.1.1 Of respondents in work before Covid-19 restrictions, three-quarters (75%) were working full-time, (i.e. five days a week or more) and a quarter (25%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) 88% of their working days before the introduction of Covid-19 restrictions. Currently, this has halved to commuting 44% of their working time. Whilst 41% are currently working from home, 15% are furloughed.

5.1.3 Once all restrictions are lifted, respondents predict making commuting journeys on 79% of their working days, equivalent to about a 10% reduction in commuting journeys.



5.1.4 In addition to increased levels of working from home, 44% of respondents would like to work more flexibly, with more flexible working hours (20%), changing start/finish times (16%) and/or working the same hours over fewer days (13%).

5.2 Journey time and mode

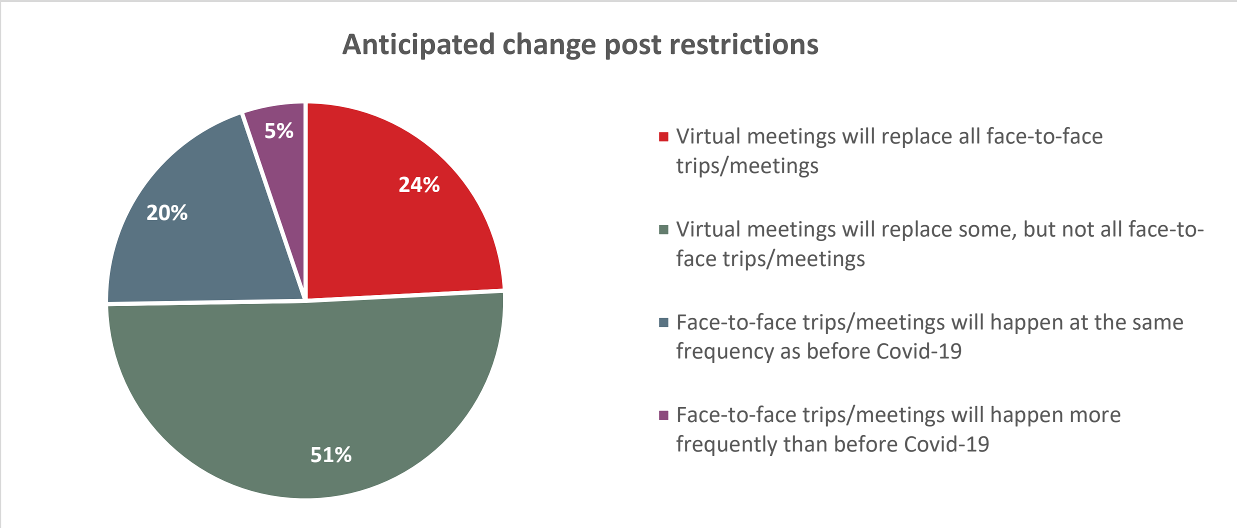
5.2.1 Typical journey time for commutes does not vary before Covid-19 restrictions, for those still commuting currently, and expected once restrictions are lifted. The average journey takes about 20 minutes, with the majority of journeys taking 11-30 minutes.

5.2.2 Respondents expect to travel to work by car or van as either a passenger or driver similar amounts once restrictions are lifted (69%), as to before restrictions were in place (67%). Respondents anticipate using public transport slightly less post restrictions for their commute (10%), compared to use before restrictions (15%).

5.3 Business trips

5.3.1 Before Covid-19 restrictions, 37% of working respondents took part in business meetings, with the vast majority of those (90%) travelling to attend between one and six business meetings in an average month.

5.3.2 Three quarters of respondents (75%) expect that virtual meetings will replace some, or all, face-to-face business meetings.



SYSTRA provides research and advice on transport, to central, regional and local government, agencies, developers, operators and financiers.

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