

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 2 REPORT: SURVEY UNDERTAKEN BETWEEN MONDAY 10TH AUGUST AND TUESDAY 18TH AUGUST 2020



nestrans



SYSTRA

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 2 REPORT: SURVEY UNDERTAKEN BETWEEN MONDAY 10TH AUGUST AND TUESDAY 18TH AUGUST 2020

IDENTIFICATION TABLE

Project owner	Nestrans
Project	North East Transport Behaviour and Attitude Surveys
Study	Wave 2 Report: survey undertaken between Monday 10 th August and Tuesday 18 th August 2020
Type of document	Draft Report
Date	04/09/2020
File name	20200903_Nestrans_Tracking Survey_W2 Report_Final_v1.1.docx
Reference number	N13/6
Number of pages	16

APPROVAL

Version	Name		Position	Date	Modifications
1	Author	Marianne Woodyard	Project Manager	25/08/2020	
	Checked by	Evelyn Robertson	Project Director	26/09/2020	
	Approved by	Evelyn Robertson	Project Director	27/08/2020	
2	Author				
	Checked by				
	Approved by				

TABLE OF CONTENTS

1.	INTRODUCTION	4
1.1	APPROACH	4
1.2	THIS REPORT	4
2.	JOURNEYS IN THE LAST SEVEN DAYS	6
2.2	WAYS OF TRAVELLING	7
2.3	CHANGES IN CURRENT BEHAVIOUR	8
3.	FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING	9
3.1	POSITIVITY AND NEGATIVITY TOWARDS TRAVELLING BY DIFFERENT METHODS	9
3.2	CURRENT SAFETY CONCERNS AND MEASURES	10
4.	ANTICIPATED CHANGE IN BEHAVIOUR	12
4.1	CHANGES TO WALKING AND CYCLING	12
5.	COMMUTE AND BUSINESS TRIPS	14
5.1	COMMUTING TRIPS	14
5.2	JOURNEY TIME AND MODE	14
5.3	BUSINESS TRIPS	15

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 2 of 10 Waves. The data was collected between Monday 10th August to Tuesday 18th August 2020.
- 1.2.2 A total of 308 respondents took part in this survey wave. 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 2 survey period, following an outbreak linked to bars in Aberdeen, included¹:
 - Closure of indoor and outdoor hospitality in the Aberdeen City local authority area;
 - People in Aberdeen City asked not to travel more than 5 miles for leisure, recreation or non-essential purchases;
 - Non-essential overseas travel continues to be advised against;
 - People are advised not to travel to Aberdeen City for leisure purposes or to visit friends and family, unless part of an extended household, while the restrictions are in place;
 - People in Aberdeen City are asked not to meet other households indoors for leisure or recreational purposes, unless part of an extended household. You can still meet people outdoors.
- 1.2.5 In line with the Getabout adverts to encourage active travel, billboards and bus shelter advertisements were launched on 10th August and are expected to be in place until 6th

¹ <https://www.gov.scot/publications/coronavirus-covid-19-local-measures/>

September. Radio adverts were played on Original FM and North Sound radio stations from the end of July through August and are expected to continue until October².

- 1.2.6 On 12th August, during the survey period, a passenger train derailment occurred near Carmont, Aberdeenshire. The accident resulted in three individuals suffering fatal injuries³. Train services to the south of Aberdeen were suspended, with coaches providing replacement connections along the line to Dundee⁴.

² <https://www.getabout.org.uk/>


³ <https://www.gov.uk/government/news/passenger-train-derailment-near-carmont-updated-21082020>

⁴ https://www.nationalrail.co.uk/service_disruptions/253790.aspx

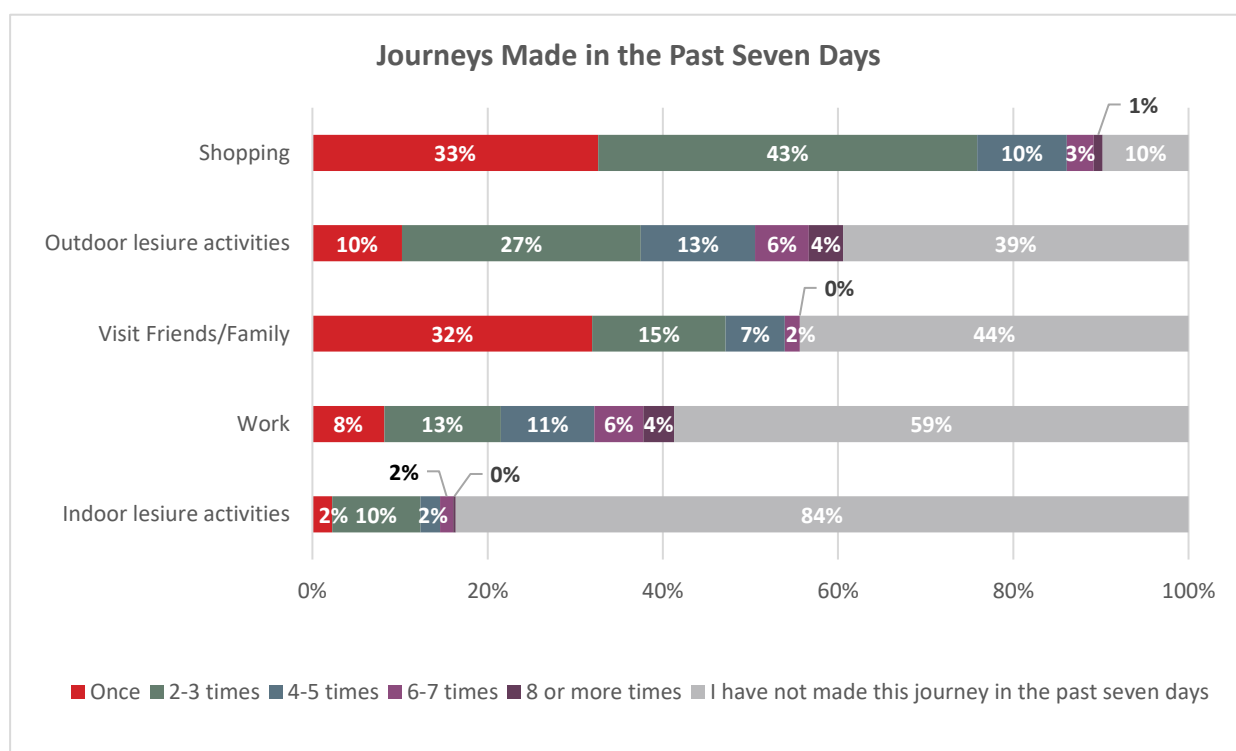
2. JOURNEYS IN THE LAST SEVEN DAYS

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 nine out of ten (90%) respondents making this trip, and three quarters (76%) making this journey between one and three times. This is similar to the Wave 1 results.

2.1.2 Travelling to take part in outdoor leisure activities was undertaken by 61% of respondents, while over half (56%) had travelled to visit family and friends. The proportion of respondents making these types of journeys was lower compared to Wave 1. The reason behind these journeys being reported less may have been due to the poor weather as well as the local restrictions affecting Aberdeen City.

2.1.3  The proportion of respondents making journeys to work (41%) and to taking part in indoor leisure activities (16%) remained similar to Wave 1. Respondents in the Nestrans region were more likely to have made a journey to work compared to the Scottish population (21%).

2.1.4 Around one fifth of respondents (21%) had made a journey to drop off or accompany a child to school or nursery. This is double the proportion of respondents who reported making this journey in Wave 1, and is as expected due to the school year beginning on 10th August.



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;

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

2.1.6 Respondents were similarly likely to predict shopping trips if restrictions were not in place.

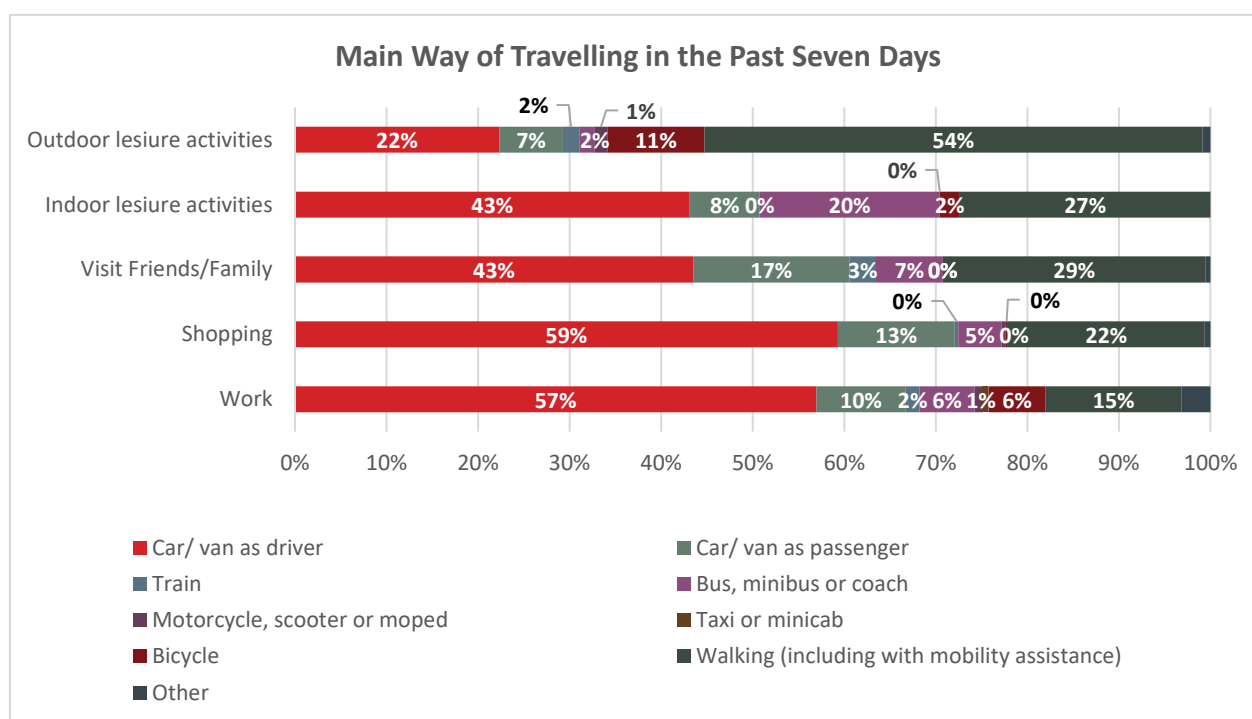
2.1.7 Respondents in Aberdeen City were more likely to predict that they would have made more journeys to visit friends and family if restrictions were not in place (91%), compared to respondents in Aberdeenshire (80%). This could be due to the local lockdown in Aberdeen City.

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 (54%) was much more frequently used than the car (29%).

2.2.2 The main way of travelling does not vary much between the survey period and before Covid-19 restrictions were introduced. Most notable differences are in relation to car use and travel by walking and cycling. Differences include:

- An increase in walking and cycling across all journey types, most notably for outdoor leisure activities (18% increase); visiting friends and families (12% increase) and travelling to indoor leisure activities (8% increase); and
- A 15-19% drop in car use when visiting friends and families and travelling to indoor leisure activities as well as outdoor leisure activities.



2.2.3 When undertaking a shopping trip, those in Aberdeenshire (83%) were more likely to have reported travelling by private vehicle in the last seven days, compared to those in Aberdeen City (64%), while those in Aberdeen City were more than twice as likely to have walked or cycled (30% compared to 13% respectively).

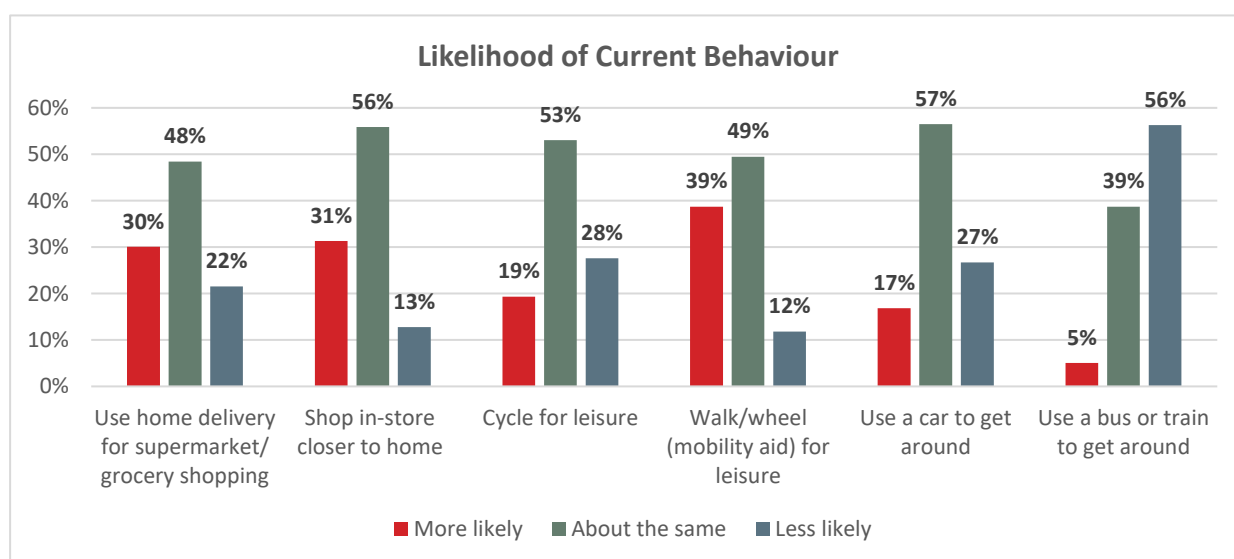
2.3 Changes in Current Behaviour

2.3.1 During the survey period, around a third of respondents reported that they were more likely to use home delivery for supermarket or grocery shopping (30%) and were more likely to shop closer to home (31%) compared to before Covid-19 travel restrictions. This behaviour suggests a continued change in shopping behaviour, with results similar to Wave 1.

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

2.3.3 Almost three fifths (56%) were less likely to use a bus or train to get around, while over a quarter (27%) reported that they were less likely to use a car to get around.

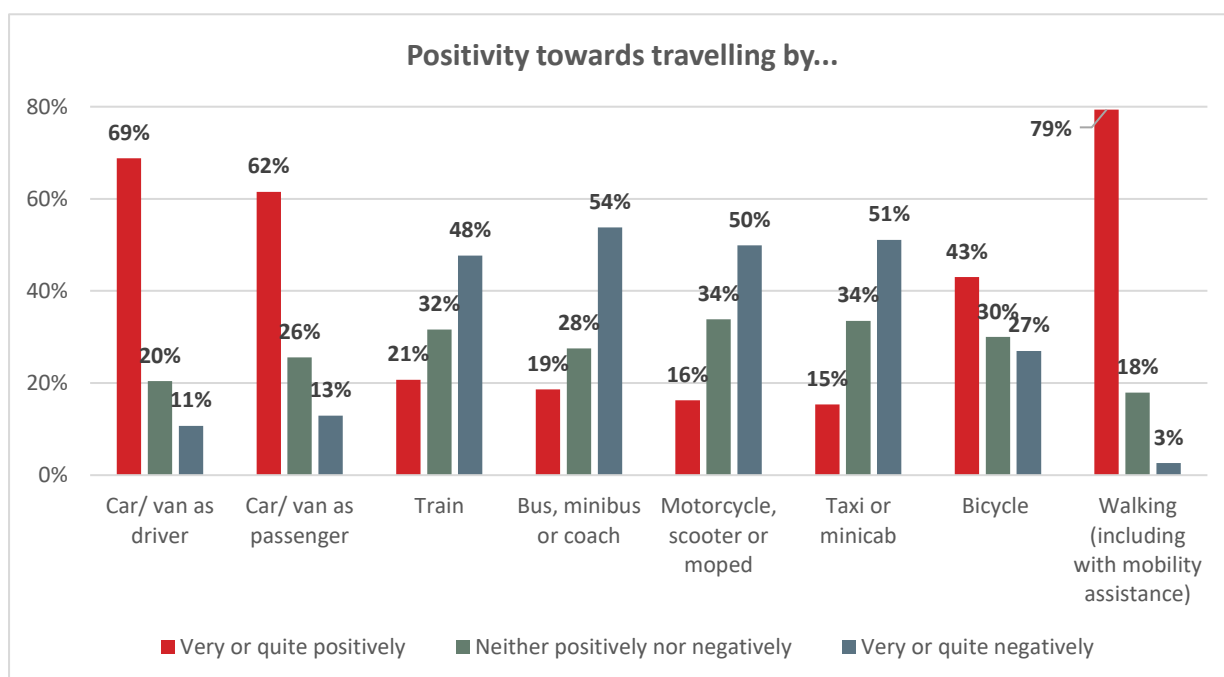
2.3.4 This behaviour suggests continued changes in likelihood of current behaviour compared to before Covid-19 travel restrictions were put in place, with results similar to Wave 1.



3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

3.1 Positivity and negativity towards travelling by different methods

3.1.1 Around two thirds of respondents felt positively towards travelling by car or van as driver (69%) or passenger (62%). Four fifths (79%) felt positively towards walking, while over two fifths (43%) felt positively towards travelling by bicycle.



3.1.2 Respondents in Aberdeenshire (74%) were more likely to report feeling positively towards travelling by car or van as a driver compared to those in Aberdeen City (64%).

3.1.3 Respondents generally reported that they felt negatively towards travelling by public transport. Around half felt this way towards travelling by bus, minibus or coach (54%), taxi or minicab (51%) and also train (48%). This is a 6% increase in negative attitudes towards travelling by train compared to Wave 1, and may be as a result of the train derailment in Aberdeenshire.

3.1.4 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 (51%);
- Cost/ too expensive (48%);
- Concern over catching coronavirus/other illness (48%);
- Behaviour of other passengers (46%);
- Travelling by car is easier / more convenient (45%).

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

- Concern over catching coronavirus/other illness (55%);
- Concerns that social distancing may not be in place (51%);
- Travelling by car is easier / more convenient (44%);
- Behaviour of other passengers (39%);
- Overcrowded (32%).

3.1.6 Interestingly, lack of cleanliness on board was cited less commonly as a reason for feeling negatively towards travelling by bus (29%), compared to Wave 1 (36%).

3.1.7 Nearly a third (31%) 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.

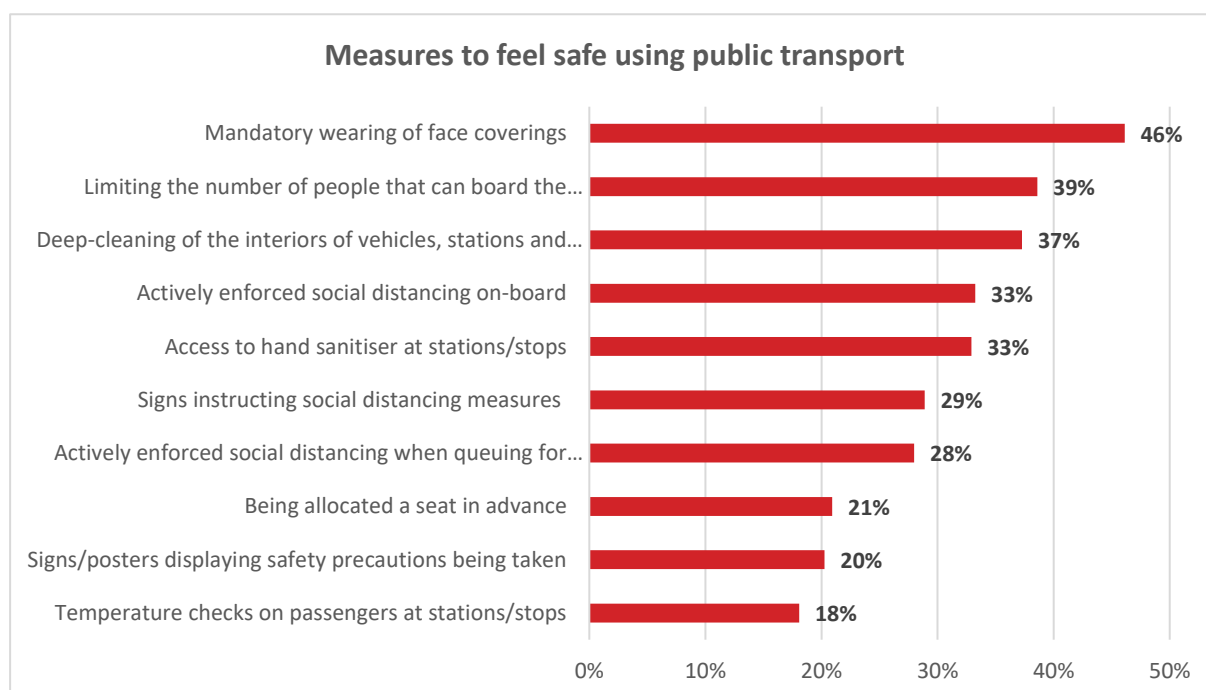


3.2 Current Safety Concerns and Measures

3.2.1 Around three quarters of respondents were concerned about people spreading or contracting the virus whilst using:

- Public transport (77%);
- Taxis or minicabs (74%);
- Shared transport, including car clubs or car sharing (75%).

3.2.2 Almost half of respondents reported that mandatory wearing of face coverings (46%) would make them feel safer when using public transport, while around two fifths reported that limiting the number of people that can board public transport (39%) and deep cleaning the interiors of vehicles, stations and bus stops (37%) would also make them feel safer.



3.2.3 Conversely, 17% suggested that no measures would make them feel safer to use public transport, while 14% reported that they already felt safe using public transport.

4. ANTICIPATED CHANGE IN BEHAVIOUR

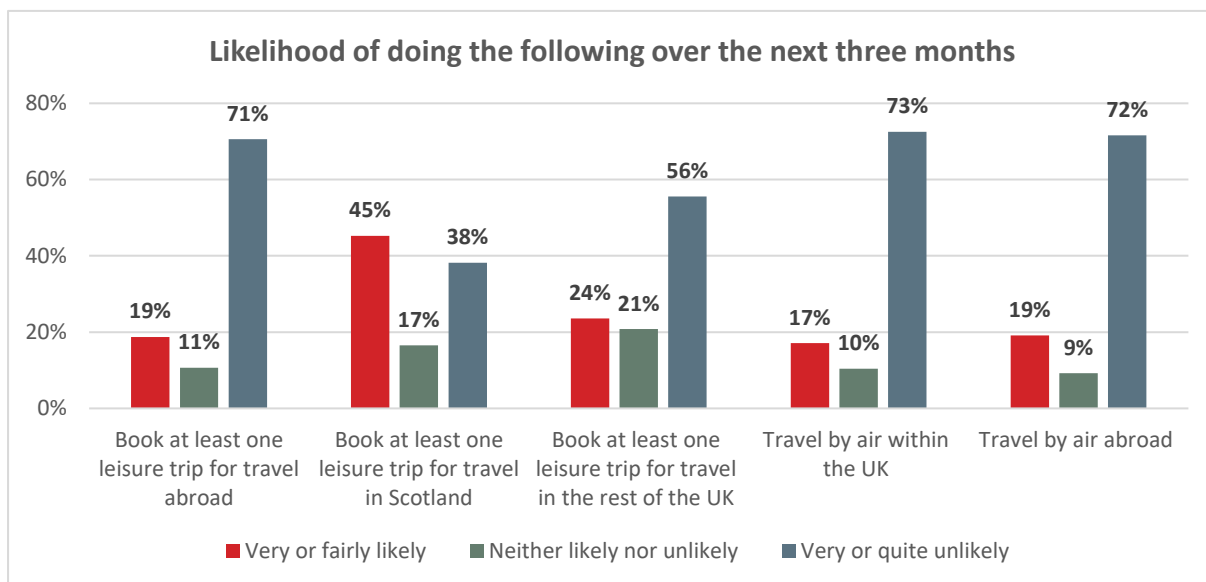
4.1 Changes to walking and cycling

- 4.1.1 Since the Covid-19 restrictions, respondents reported increased levels of both walking and cycling. The increase has primarily been for leisure/exercise purposes (54% and 31% respectively). Walking and cycling have also been used to replace journeys that normally would have been made another way (31% and 21% respectively), which is a slight increase compared to Wave 1.
- 4.1.2 Those in Aberdeen City were more likely to have reported an increase in their walking and cycle behaviour compared to those in Aberdeenshire, specifically in relation to walking for leisure/exercise purposes (61% vs 45%); walking to replace a journey normally made another way (37% vs 22%); cycling to replace a journey normally made another way (32% vs 8%).
- 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 includes for leisure/exercise purposes (83% and 74% 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 (81%); shopping (77%); visiting friends and family (74%); indoor leisure activities (73%) or outdoor leisure activities (77%).
- 4.2.2 Respondents also did not anticipate making journeys that would take them further afield in the next three months. Around seven in ten respondents suggested that it was unlikely that they would book a leisure trip for travel abroad (71%); travel by air within the UK (73%); or travel by air abroad (72%).
- 4.2.3 Identically to Wave 1, respondents reported that they are more likely to stay closer to home, as almost half (45%) thought 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 There was more appetite for travel for respondents living in Aberdeen City, than Aberdeenshire, with City respondents more likely to anticipate booking a leisure trip for travel in Scotland (53%) and travelling by air abroad (25%) compared to Aberdeenshire respondents (37% and 12% respectively).



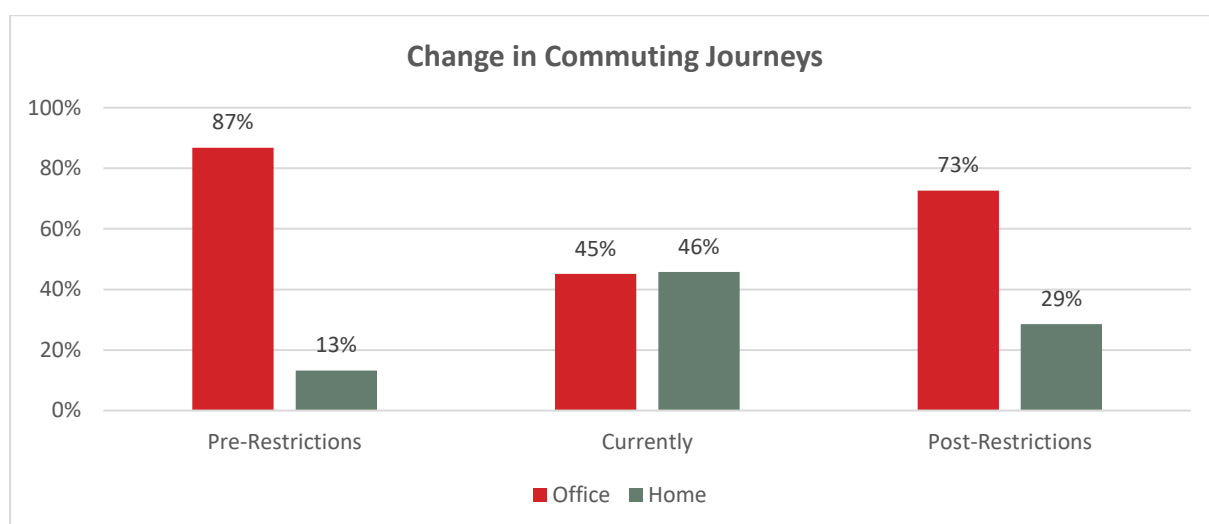
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting Trips

5.1.1 Of respondents in work before Covid-19 restrictions, just under three-quarters (71%) were working full-time (i.e. five days a week or more) and over a quarter (29%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) 87% of their working days before the introduction of Covid-19 restrictions. Currently, this has halved to commuting 45% of their working time. Whilst 46% are currently working from home, 11% are furloughed; this is a slight decrease from Wave 1.

5.1.3 Once all restrictions are lifted, respondents predict making commuting journeys on 73% of their working days, equivalent to about a 14% reduction in commuting journeys.



5.1.4 Almost three fifths (59%) of respondents would like to work more flexibly, with more flexible working hours (21%), changing start/finish times (20%) and/or working the same hours over fewer days (17%).

5.2 Journey Time and Mode

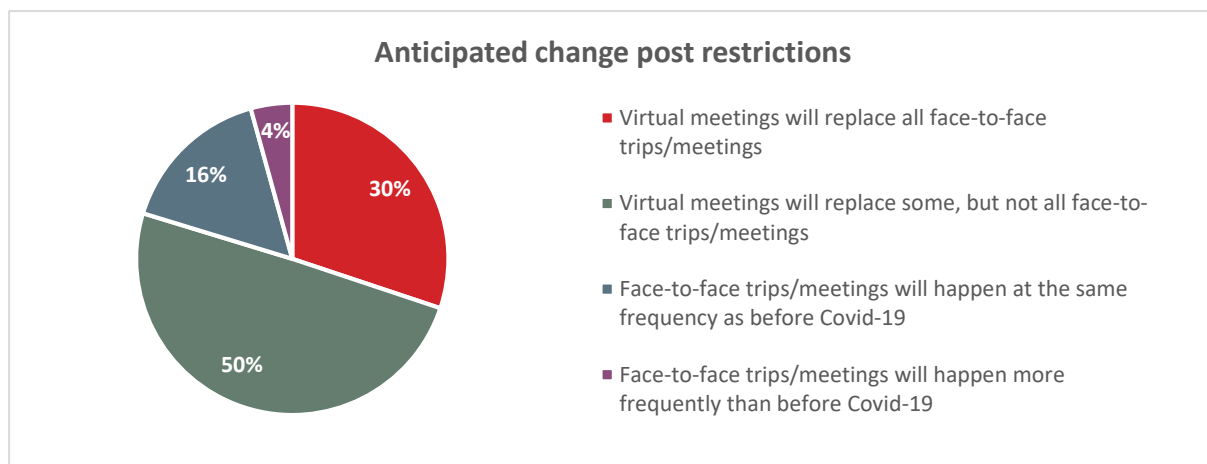
5.2.1 Typical journey time for commutes does not vary before Covid-19 restrictions, for those still commuting currently, and expected once restrictions are lifted. The average journey takes about 20 minutes, with the majority of journeys taking 11-30 minutes.

5.2.2 Respondents expect to travel to work by car or van as either or a passenger or driver slightly more once restrictions are lifted (73%) compared to before restrictions were put in place (67%). Respondents anticipate using public transport slightly less post restrictions for their commute (8%) compared to use before restrictions (11%).

5.3 Business Trips

5.3.1 Before Covid-19 restrictions, two fifths (39%) of working respondents took part in business meetings, with the majority (76%) travelling to attend between one and four business meetings in an average month.

5.3.2 Interestingly, four fifths (80%) 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.

A diverse group of results-oriented people, we are part of a strong team of professionals worldwide. Through client business planning, customer research and strategy development we create solutions that work for real people in the real world.

For more information visit www.systra.co.uk

Birmingham – Newhall Street

5th Floor, Lancaster House, Newhall St,
Birmingham, B3 1NQ
T: +44 (0)121 393 4841

Birmingham – Edmund Gardens

1 Edmund Gardens, 121 Edmund Street,
Birmingham B3 2HJ
T: +44 (0)121 393 4841

Dublin

2nd Floor, Riverview House, 21-23 City Quay
Dublin 2, Ireland
T: +353 (0) 1 566 2028

Edinburgh – Thistle Street

Prospect House, 5 Thistle Street, Edinburgh EH2 1DF
United Kingdom
T: +44 (0)131 460 1847

Glasgow – St Vincent St

Seventh Floor, 124 St Vincent Street
Glasgow G2 5HF United Kingdom
T: +44 (0)141 468 4205

Glasgow – West George St

250 West George Street, Glasgow, G2 4QY
T: +44 (0)141 468 4205

Leeds

100 Wellington Street, Leeds, LS1 1BA
T: +44 (0)113 360 4842

London

3rd Floor, 5 Old Bailey, London EC4M 7BA United Kingdom
T: +44 (0)20 3855 0079

Manchester – 16th Floor, City Tower

16th Floor, City Tower, Piccadilly Plaza
Manchester M1 4BT United Kingdom
T: +44 (0)161 504 5026

Newcastle

Floor B, South Corridor, Milburn House, Dean Street, Newcastle, NE1
1LE
United Kingdom
T: +44 (0)191 249 3816

Perth

13 Rose Terrace, Perth PH1 5HA
T: +44 (0)131 460 1847

Reading

Soane Point, 6-8 Market Place, Reading,
Berkshire, RG1 2EG
T: +44 (0)118 206 0220

Woking

Dukes Court, Duke Street
Woking, Surrey GU21 5BH United Kingdom
T: +44 (0)1483 357705

Other locations:

France:

Bordeaux, Lille, Lyon, Marseille, Paris

Northern Europe:

Astana, Copenhagen, Kiev, London, Moscow, Riga, Wroclaw

Southern Europe & Mediterranean: Algiers, Baku, Bucharest,

Madrid, Rabat, Rome, Sofia, Tunis

Middle East:

Cairo, Dubai, Riyadh

Asia Pacific:

Bangkok, Beijing, Brisbane, Delhi, Hanoi, Hong Kong, Manila,
Seoul, Shanghai, Singapore, Shenzhen, Taipei

Africa:

Abidjan, Douala, Johannesburg, Kinshasa, Libreville, Nairobi

Latin America:

Lima, Mexico, Rio de Janeiro, Santiago, São Paulo

North America:

Little Falls, Los Angeles, Montreal, New-York, Philadelphia,
Washington

The SYSTRA logo is rendered in a bold, red, sans-serif typeface. The letters are thick and closely spaced, with a distinctive design where the 'S' and 'Y' have a slightly irregular, hand-drawn quality. The 'A' is also bold and blocky. The overall appearance is modern and professional.