NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 3 REPORT (SURVEY UNDERTAKEN BETWEEN TUESDAY 1ST SEPTEMBER TO TUESDAY 8TH SEPTEMBER 2020)

nestrans

Smarter Choices, Smarter Places
Supporting Sustainable Travel

SYSTRA

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 3 REPORT (SURVEY UNDERTAKEN BETWEEN TUESDAY 1ST SEPTEMBER TO TUESDAY 8TH SEPTEMBER 2020)

IDENTIFICATION TABLE	
Project owner	Nestrans
Project	North East Transport Behaviour and Attitude Surveys
Study	Wave 3 Report (Survey undertaken between Tuesday 1st September to Tuesday 8th September 2020)
Type of document	Final Report
Date	28/09/2020
File name	20200928_Nestrans_Tracking Survey_W3 Final Report_v1.0.docx
Reference number	N13/6
Number of pages	15

APPROVAL

Version	Name		Position	Date	Modifications
1	Author	Marianne Woodyard	Project Manager	16/09/2020	
	Checked by	Evelyn Robertson	Project Director	17/09/2020	
	Approved by	Evelyn Robertson	Project Director	17/09/2020	
2	Author	Marianne Woodyard	Project Manager	28/09/2020	
	Checked by	Evelyn Robertson	Project Director	28/09/2020	
	Approved by	Evelyn Robertson	Project Director	28/09/2020	

TABLE OF CONTENTS

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].

1.2 This Report

1.2.1 This report covers the main findings from Wave 3 of 10 Waves. The data was collected between Tuesday 1st September to Tuesday 8th September 2020.

1.2.2 A total of 320 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. The sample is about evenly split between the two council areas; 47% of respondents were from Aberdeenshire and 53% were from Aberdeen City.

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 3 survey period, following the lockdown lift in Aberdeen, included[2]:

- Restrictions on travel, gatherings, and hospital and care home visits were lifted in Aberdeen City on 27th August 2020;
- Restaurants, pubs, casinos and other hospitality premises were permitted to re-open, subject to an assurance check;
- People living in Aberdeen were required to follow the general staying safe guidance.

1.2.5 In line with the Getabout adverts to encourage active travel, billboards and bus shelter advertisements launched on 10th August 2020 and are expected to be in place until 6th September 2020. Radio adverts were played on Original FM and North Sound radio stations from the end of July 2020 and are expected to continue until October 2020[3].

[1] https://www.transport.gov.scot/publication/covid-19-public-attitudes-survey-data-wave-7/
[2] https://www.gov.scot/publications/coronavirus-Covid-19-local-measures/
[3] https://www.getabout.org.uk/

2. JOURNEYS IN THE LAST SEVEN DAYS

2.1.1 All respondents had made at least one journey in the last seven days, compared to nine out of 10 (89%) of the Scottish population.

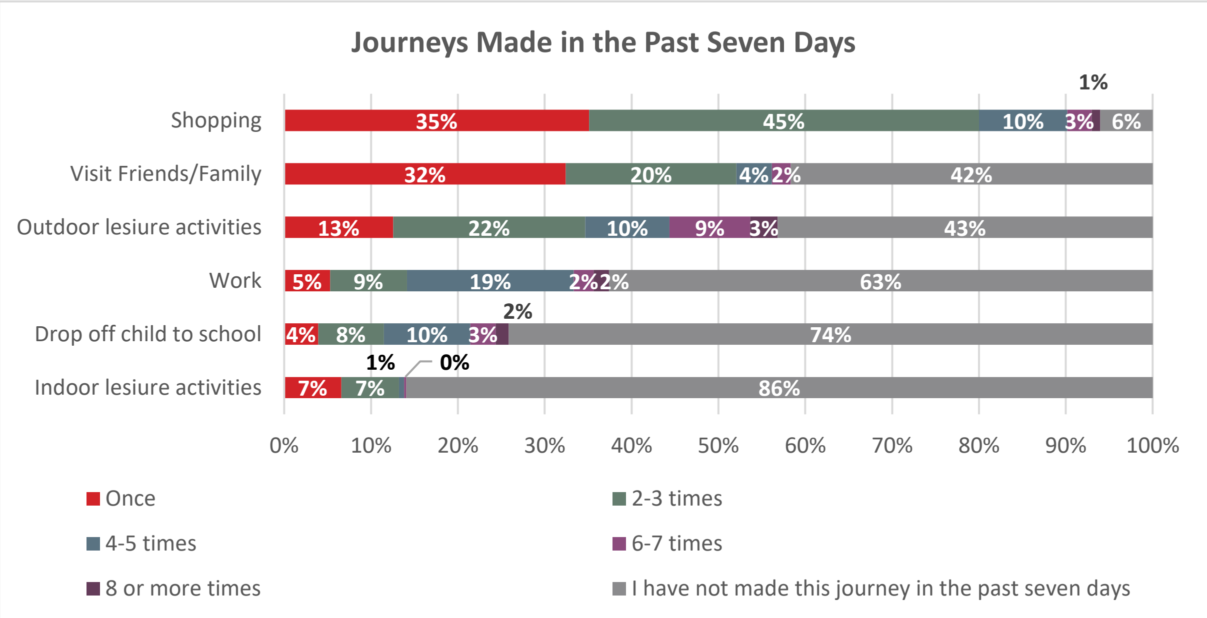
2.1.2 In the past seven days, the most frequently made trip was for shopping, with almost all (94%) respondents making this trip, and four fifths (80%) making this journey between one and three times a week. This is similar to both Wave 1 and Wave 2.

2.1.3 Respondents from a city or large town centre or suburb (98%) were more likely to have made a shopping trip in the last seven days compared to respondents from small towns, villages or rural areas (89%).

2.1.4 Almost three fifths visited family and friends (58%) and/or made journeys to take part in outdoor leisure activities (57%) at least once in the last seven days, similar to Wave 2. Respondents from Aberdeenshire (26%) were more likely to have left their home for outdoor leisure activities four or more times in the last seven days than respondents from Aberdeen City (18%).

2.1.5 The proportion of respondents undertaking a journey to work (37%) was slightly lower compared to Wave 2 (41% previously), while those dropping off a child to school or nursery in the last seven days (26%) increased by 5% from Wave 2.

2.1.6 The proportion of respondents who had travelled to work in the past seven days in the Nestrans region (37%) was slightly higher than that of the Scottish population (32%).



2.1.7 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:

- Almost double the number of average work trips;
- Over four times as many average trips for indoor leisure activities;
- One and a half times more average trips to visit friends and family.

2.1.8 Respondents predicted similar numbers of shopping trips and journeys to drop off their child to school if restrictions were not in place.

2.2 Ways of travelling

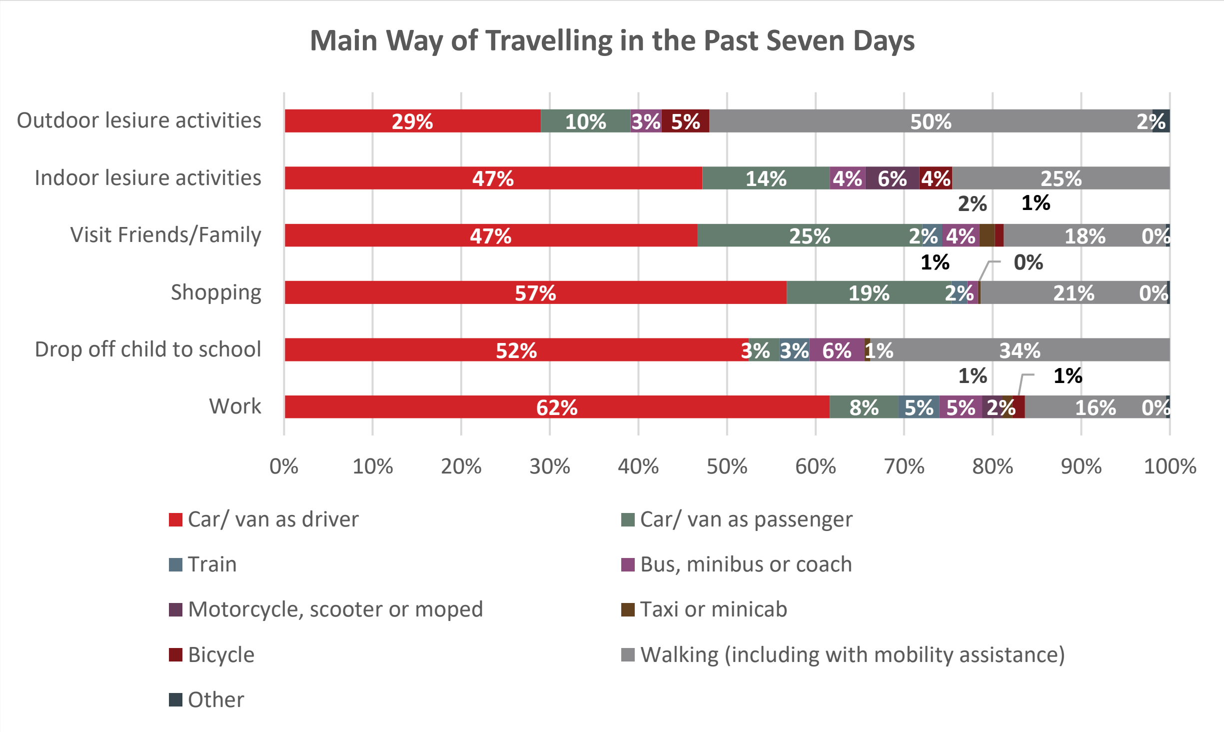
2.2.1 Travelling by car, as a driver or passenger, was the most frequently used main way of travelling for all journey types, with the exception of journeys for outdoor leisure activities, where walking (50%) was more frequently used than the car (39%).

2.2.2 Notably, a third (34%) of respondents travelled by walking as the main way to drop off their child to school; a quarter (25%) travelled this way to indoor leisure activities; and a fifth (21%) travelled this way to undertake shopping trips.

2.2.3 Respondents from Aberdeen City (24%) were twice as likely to undertake shopping trips by walking or cycling than respondents in Aberdeenshire (12%). Respondents from the Nestrans region were similarly like to have undertaken their shopping trip by walking as the Scottish population (21% and 19% respectively).

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

2.2.5 Most notable differences were in relation to journeys made to drop off a child at school. Fewer respondents reported using the car as their main way of travelling in the last seven days compared to before restrictions (12% decrease); whilst more respondents reported walking as their main way of travelling to drop off their child (11% increase).



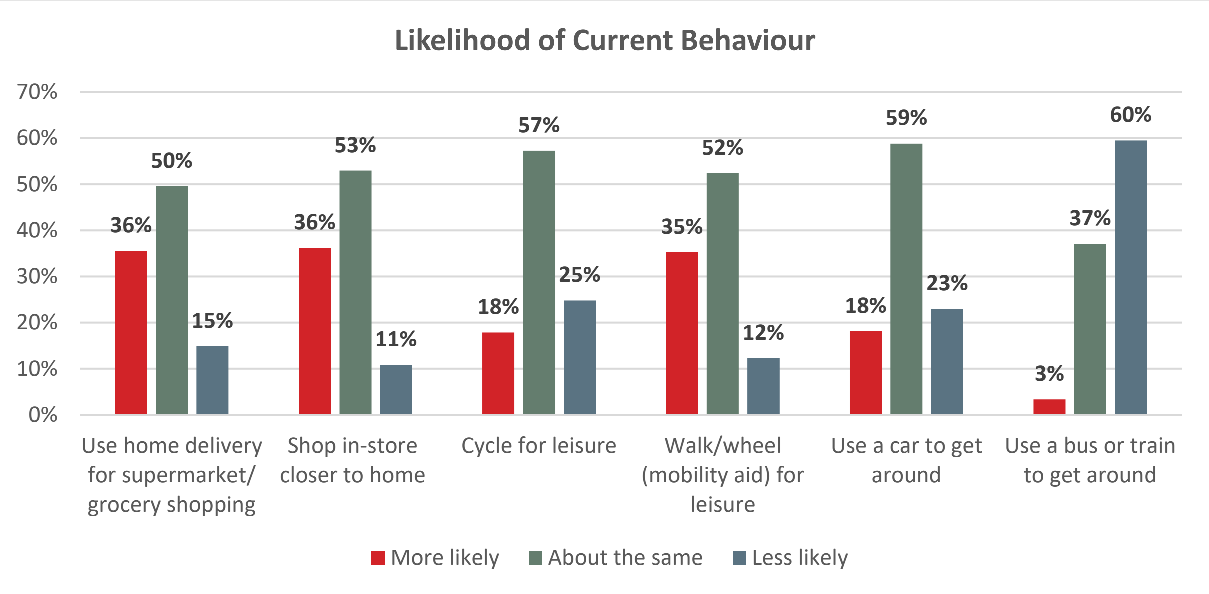
2.3 Changes in Current Behaviour

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 (36%) and were more likely to shop closer to home (36%) compared to before Covid-19 travel restrictions were put in place.

2.3.2 Respondents in the Nestrans region (36%) were less likely to shop in store closer to home compared to the Scottish population (48%). Respondents from Aberdeen City (42%) were more likely to shop in store closer to home than those in Aberdeenshire (30%).

2.3.3 Respondents also suggested that they were more likely to engage in physical activity for leisure purposes than before Covid-19 restrictions, with a just under a fifth (18%) reporting that they were more likely to cycle for such purposes, and over a third (35%) reporting they were more likely to walk or wheel. Three fifths (60%) were less likely to use a bus or train to get around.

2.3.4 This behaviour is similar to both Wave 1 and Wave 2 findings.



Likelihood of Current Behaviour
70%
60%
50%
40%
30%
20%
10%
0%
36%
50%
15%
36%
53%
11%
18%
57%
25%
35%
52%
12%
18%
59%
23%
3%
37%
60%
Use home delivery for supermarket/ grocery shopping
Shop in-store closer to home
Cycle for leisure
Walk/wheel (mobility aid) for leisure
Use a car to get around
Use a bus or train to get around
More likely
About the same
Less likely

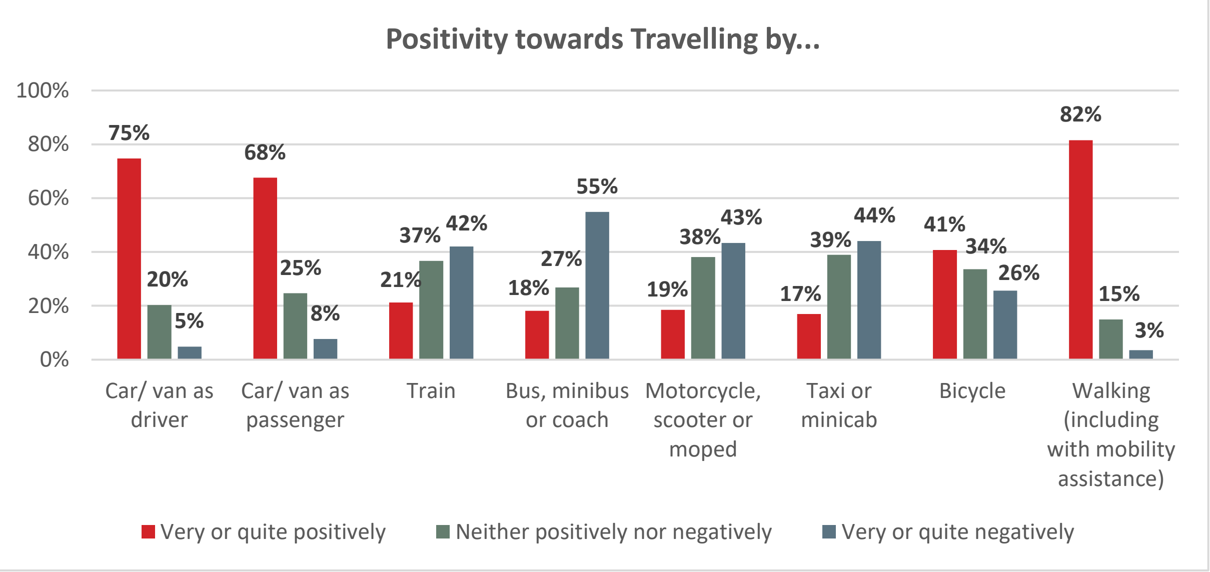
3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

3.1 Positivity and negativity towards travelling by different methods

3.1.1 Three quarters (75%) of respondents felt positively towards travelling by car or van as a driver, and over two thirds (68%) felt this way as a passenger. Over four fifths (82%) felt positively towards walking, while two fifths (41%) felt positively towards travelling by bicycle.

3.1.2 Respondents generally reported that they felt negatively towards travelling by public transport. Over half felt this way towards travelling by bus, minibus or coach (55%), while over two fifths felt negatively towards travelling by train (42%) and taxi or minicab (44%).

3.1.3 In general, fewer respondents reported feeling negatively towards travelling by train and taxi compared to Wave 1 and Wave 2, with a 6-7% decrease.



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

- Concern over catching coronavirus/other illness (61%);
- Concerns that social distancing may not be in place (45%);
- Cost/ too expensive (37%);
- Travelling by car is easier / more convenient (36%);
- Behaviour of other passengers (36%).

3.1.5 While more respondents cited concern over catching coronavirus or another illness as the reason they felt negatively towards the train than in Wave 2 (13% increase); the behaviour of others was cited less frequently (10% decrease).

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

- Concern over catching coronavirus/other illness (56%);
- Travelling by car is easier / more convenient (47%);
- Behaviour of other passengers (41%)
- Concerns that social distancing may not be in place (41%);
- Lack of cleanliness on board (31%).

3.1.7 Interestingly, concern that social distancing may not be in place (41%) was cited less commonly as a reason for feeling negatively towards travelling by bus, compared to Wave 2 (51%).

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 (77%);
- Shared transport, including car clubs or car sharing (70%);
- Taxis or minicabs (67%).

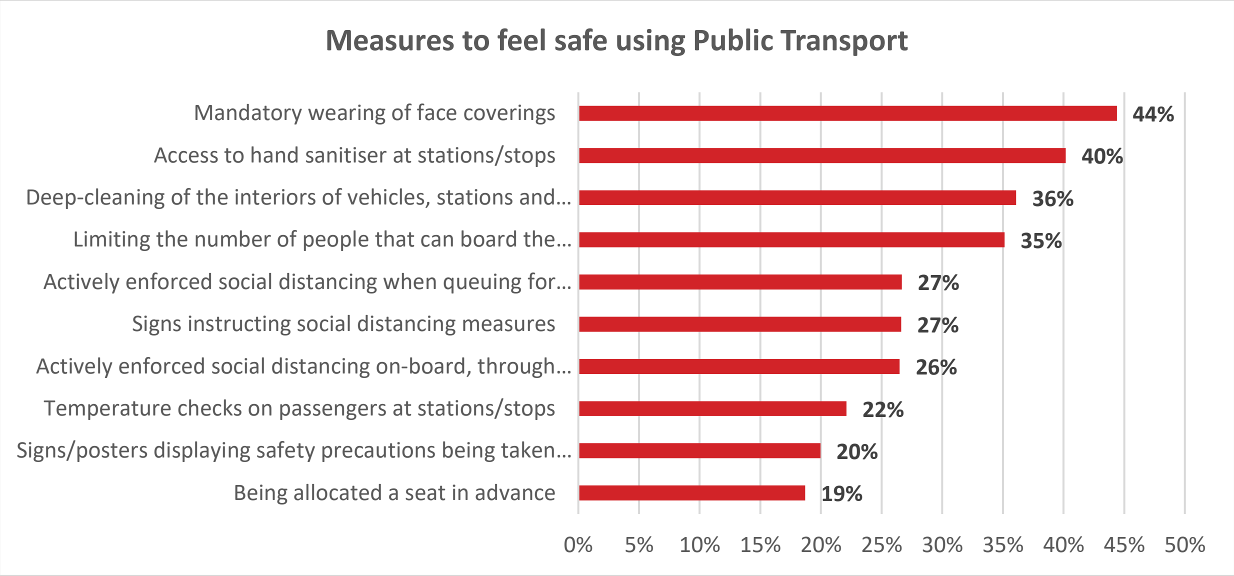
3.2.2 Respondents in the Nestrans region were more likely to have reported being concerned about people spreading or contracting the virus while on public transport (77%) compared to the Scottish population (68%).

3.2.3 Around two fifths of respondents reported that mandatory wearing of face coverings (44%) and access to hand sanitiser at stations and stops (40%) would make them feel safer when using public transport over the next month or so. Face coverings on public transport have been mandatory in Scotland since June 22nd 2020[4].

3.2.4 Over a third suggested that deep-cleaning of the interiors of vehicles, stations and bus stops (36%) and limiting the number of people that can board the train/tram/bus (35%) would make them feel safer.

3.2.5 Over a quarter suggested actively enforced social distancing when queuing for tickets through staff presence and CCTV (27%) and signs instructing social distancing measures (27%) would make them feel safer.

[4] https://www.gov.scot/news/face-coverings-mandatory-on-public-transport-from-22-june/#:~:text=Face%20coverings%20mandatory%20on%20public,scot



3.2.6 Conversely, over a fifth (22%) reported that nothing would make them feel safer, a 5% increase from Wave 2. One in ten (12%), however, suggested that they already felt safe.

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 (49% and 30% respectively). Walking and cycling have also been used to replace journeys that normally would have been made another way (30% and 16% respectively).

4.1.2 Positively, the majority of respondents expect that they will maintain these increased levels of walking and cycling once Covid-19 restrictions are lifted, mainly for leisure/exercise purposes (78% and 72% respectively).

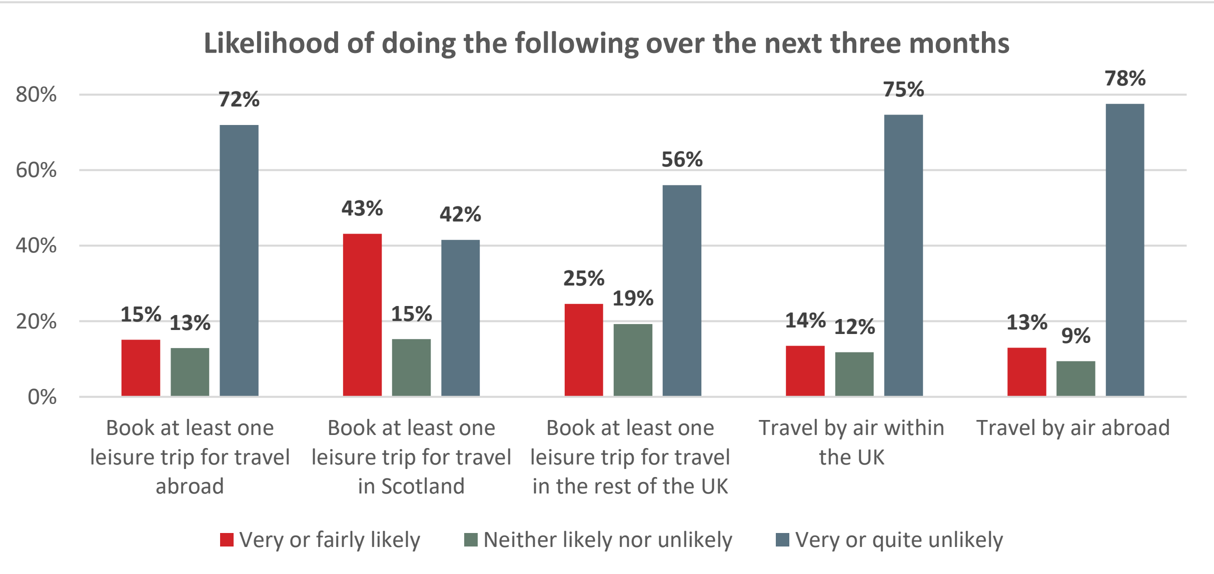
4.2 Travelling further afield

4.2.1 The majority of respondents did not anticipate changes to how much they travel in the next couple of weeks for: work (84%); to drop off their child to school (91%); shopping (77%); visiting friends and family (73%); indoor leisure activities (73%) or outdoor leisure activities (79%).

4.2.2 Between 14% and 17% of respondents did anticipate an increase in the amount they will travel for shopping; visiting friends and family and indoor leisure activities.

4.2.3 Similarly to both previous waves, respondents reported that they are more likely to stay closer to home, as over two fifths (43%) 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 (25%) or abroad (15%).

4.2.4 Respondents in the Nestrans region were slightly less likely to predict booking a leisure trip in Scotland (43%) compared to the Scottish population (47%).



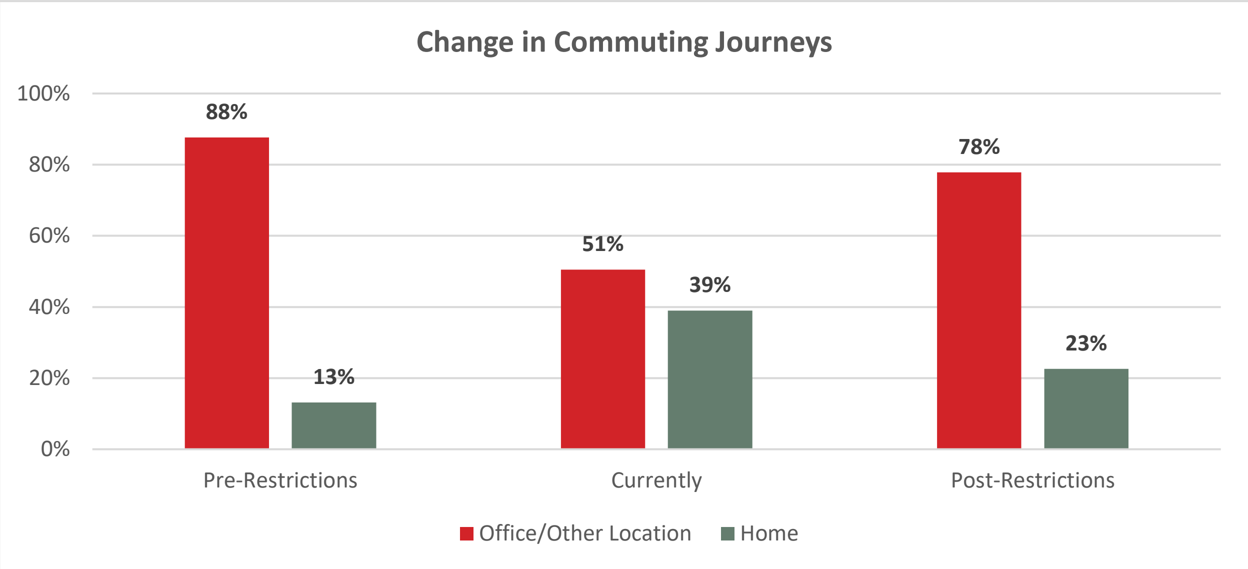
5. COMMUTE AND BUSINESS TRIPS

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, they are making commuting trips 51% of their working time. Whilst 39% are currently working from home, 11% are furloughed.

5.1.3 Once all restrictions are lifted, respondents predict making commuting journeys on 78% of their working days, equivalent to a 10% reduction in commuting journeys.



5.1.4 Almost half (45%) of respondents would like to work more flexibly, with more flexible working hours (24%), changing start/finish times (11%) and/or working the same hours over fewer days (8%). The proportion of respondents who reported that they would like work more flexibility is less than those in the Wave 2 (14% decrease).

5.2 Journey Time and Mode

5.2.1 The average journey time before Covid-19 restrictions was about 21 minutes, while the average journey time for current commutes was about 11 minutes. The majority of journeys both before restrictions and current commutes took 11-30 minutes.

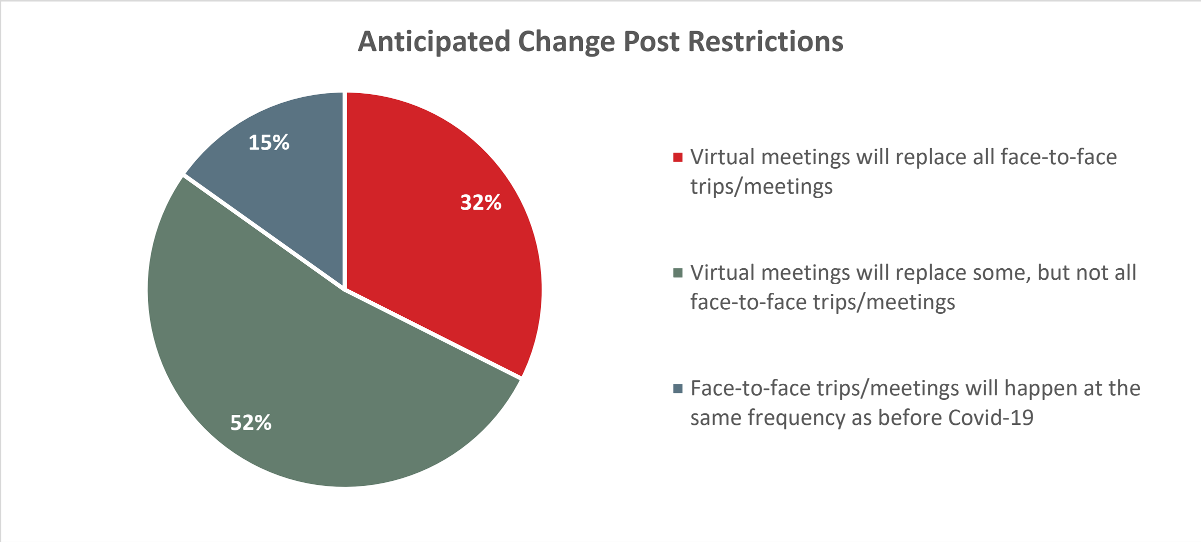
5.2.2 Respondents expect to travel to work by car or van as either a passenger or driver similar amounts once restrictions are lifted (74%), as to before restrictions were in place (73%).

Respondents anticipate using public transport similar amounts post restrictions for their commute (11%), compared to use before restrictions (12%).

5.3 Business Trips

5.3.1 Before Covid-19 restrictions, a third (34%) of working respondents took part in business meetings, with the majority (61%) travelling to attend between one and four business meetings in an average month.

5.3.2 Over four fifths of respondents (85%) expect that virtual meetings will replace some, or all, face to face business meetings. This is a continued increase from Wave 1 (75%) and Wave 2 (80%).



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

SYSTRA