

# NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

## WAVE 4 REPORT (SURVEY UNDERTAKEN BETWEEN 21ST AND 28TH SEPTEMBER 2020)



nestrans



SYSTRA

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## IDENTIFICATION TABLE

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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<sup>1</sup>.

## 1.2 This Report

1.2.1 This report covers the main findings from Wave 4 of 10 Waves. The data was collected between Monday 21<sup>st</sup> September to Monday 28<sup>th</sup> September 2020.

1.2.2 A total of 323 respondents took part in this survey wave. The sample is about evenly split between the two council areas; 46% of respondents were from Aberdeenshire and 54% were from 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 4 survey period, following an increase in Covid-19 cases across the UK, included stricter rules<sup>2</sup>:

- Individuals must not make indoor social visits to other households;
- Pubs, bars and restaurants must close at 10pm;
- Individuals may meet outside, in gardens or public spaces, in groups of up to 6 people from no more than 2 households (not counting under-12s);
- Individuals must stay 2 metres apart from anyone not in their household;
- A maximum of 6 people from 2 households can meet in public indoor spaces such as cafes, pubs and restaurants;
- Individuals should only car share with members of their own, or extended, household;
- Customers must wear a face covering in shops and other retail premises;
- Primary, secondary and special schools re-opened in August;

<sup>1</sup> <https://www.transport.gov.scot/publication/covid-19-public-attitudes-survey-data-wave-8/>

<sup>2</sup> <https://www.gov.scot/publications/coronavirus-Covid-19-local-measures/>

- To support physical distancing, colleges and universities will deliver blended learning;
- Everyone who can work from home should continue to do so;
- Sports and leisure facilities such as gyms, swimming pools, skating rinks and dance studios can re-open, with physical distancing and enhanced hygiene.

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

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<sup>3</sup> <https://www.getabout.org.uk/>

## 2. JOURNEYS IN THE LAST SEVEN DAYS

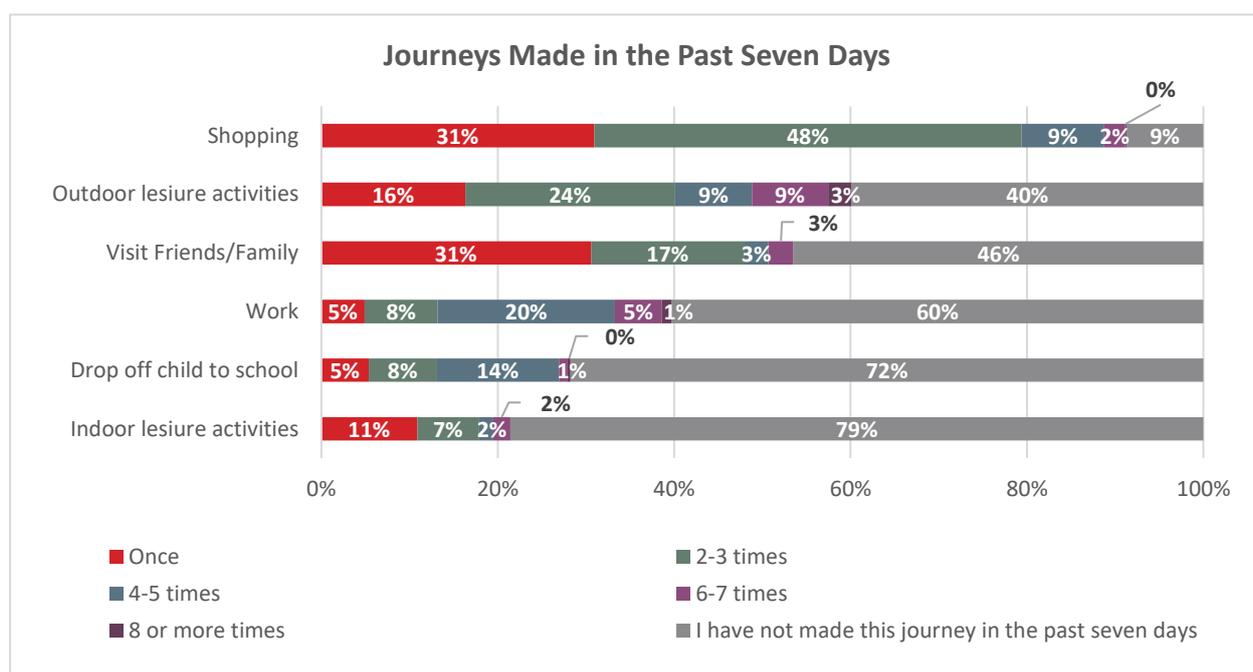
2.1.1 Only one respondent reported that they had not made any of the specified journeys in the last seven days, compared to 8% of the Scottish population. 

2.1.2 In the past seven days, the most frequently made trip was for shopping, with nine in ten respondents (91%) making this trip, and four in five (79%) making this journey between one and three times.

2.1.3 Three out of five (60%) respondents had travelled at least once to undertake outdoor leisure activities, compared to just over a fifth (21%) who had travelled to indoor leisure activities. Over half (54%) had made a journey to visit friends and family in the last seven days. These findings are similar to those of previous waves.

2.1.4  Two fifths (40%) had undertaken a journey to work in the last seven days, compared to less than a third (30%) of the wider Scottish population. More respondents in Aberdeen City had undertaken a journey to work in the last seven days compared to those in Aberdeenshire (42% vs 37%).

2.1.5 Over a quarter (28%) had a dropped off a child to school in the last seven days, demonstrating a continued increase across the waves.



2.1.6 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:

- One and half times more average work trips;
- One and half times more average visits to friends and family;

- Almost triple the number of average trips for indoor leisure activities.

2.1.7 Respondents predicted similar numbers of shopping trips; journeys to drop off their child to school and trips to outdoor leisure activities if restrictions were not in place.

## 2.2 Ways of travelling

2.2.1 Similar to previous waves, 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 (51%) was more frequently used than the car (37%).

2.2.2 Almost two fifths (37%) of respondents travelled by walking as the main way to drop off their child to school; a quarter (24%) travelled this way to visit friends and family; and over a fifth (22%) travelled this way to undertake shopping trips.

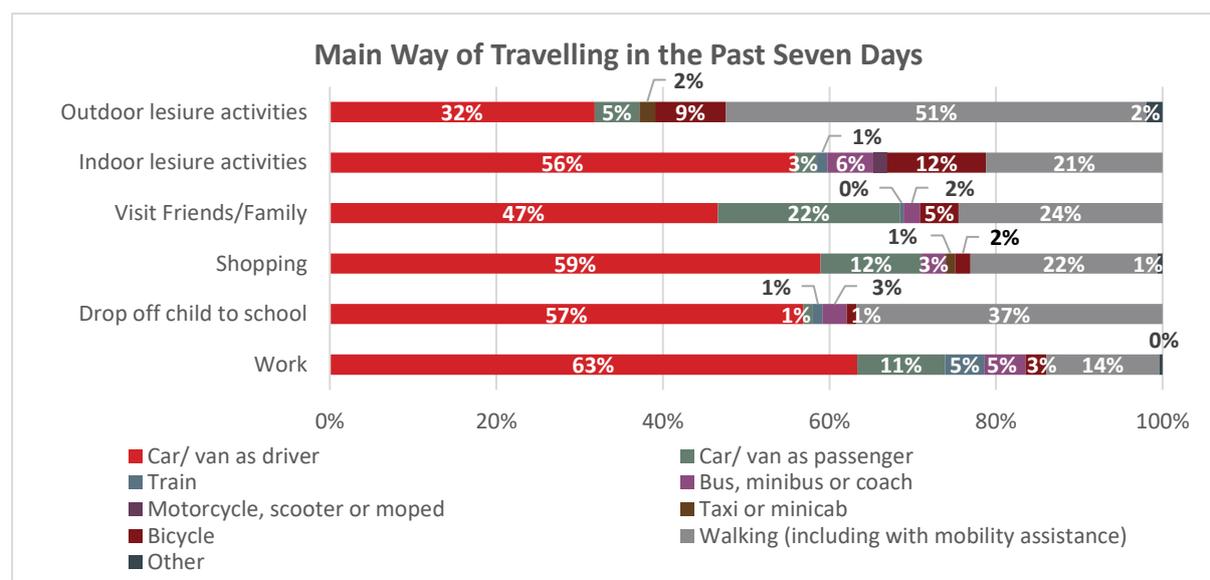
2.2.3 Compared to the Nestrans population, a smaller proportion of the Scottish population reported that they undertook journeys by walking to drop off a child at school (29%).



2.2.4 Respondents in Aberdeen City were over twice as likely (32%) to travel by bicycle or walking to undertake shopping trips compared to those in Aberdeenshire (15%).

2.2.5 Around one in ten respondents travelled by bicycle to indoor leisure activities (12%) and outdoor leisure activities (9%).

2.2.6 The main way of travelling does not vary much between the survey period and before Covid-19 restrictions were introduced. There was however an increase in respondents who travelled by bicycle for indoor leisure activities in the last seven days (12%) compared to before restrictions were in place (2%).



## 2.3 Changes in Current Behaviour

2.3.1 During the survey period, over a third of respondents reported that they have changed the way they shop compared to before Covid-19 travel restrictions were put in place.

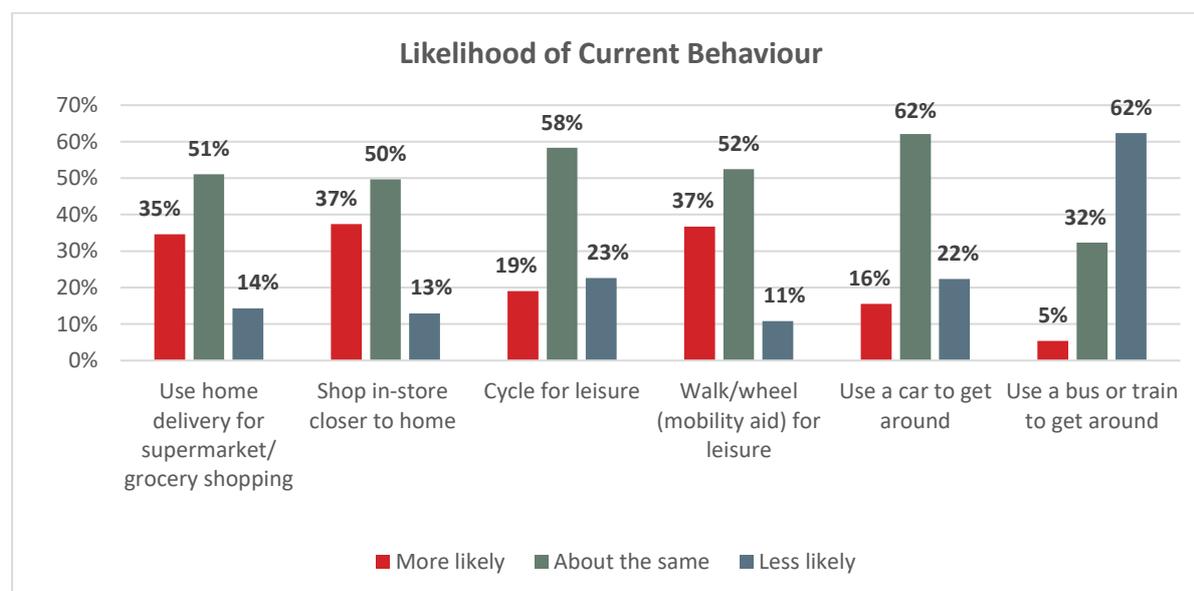
2.3.2 Respondents reported that they were more likely to use home delivery for supermarket or grocery shopping (35%) than before restrictions were put in place, and were more likely to do so compared to the Scottish population (22%). A third of respondents also reported that they were more likely to shop closer to home (37%), however they were less likely to report this compared to the rest of the Scottish population (50%).



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 (19%) reporting that they were more likely to cycle for such purposes, and over a third (37%) reporting that they were more likely to walk or wheel.

2.3.4 Three fifths (62%) of respondents reported that they were less likely to use a bus or train to get around.

2.3.5 This change in behaviour is consistent with findings of the previous waves.

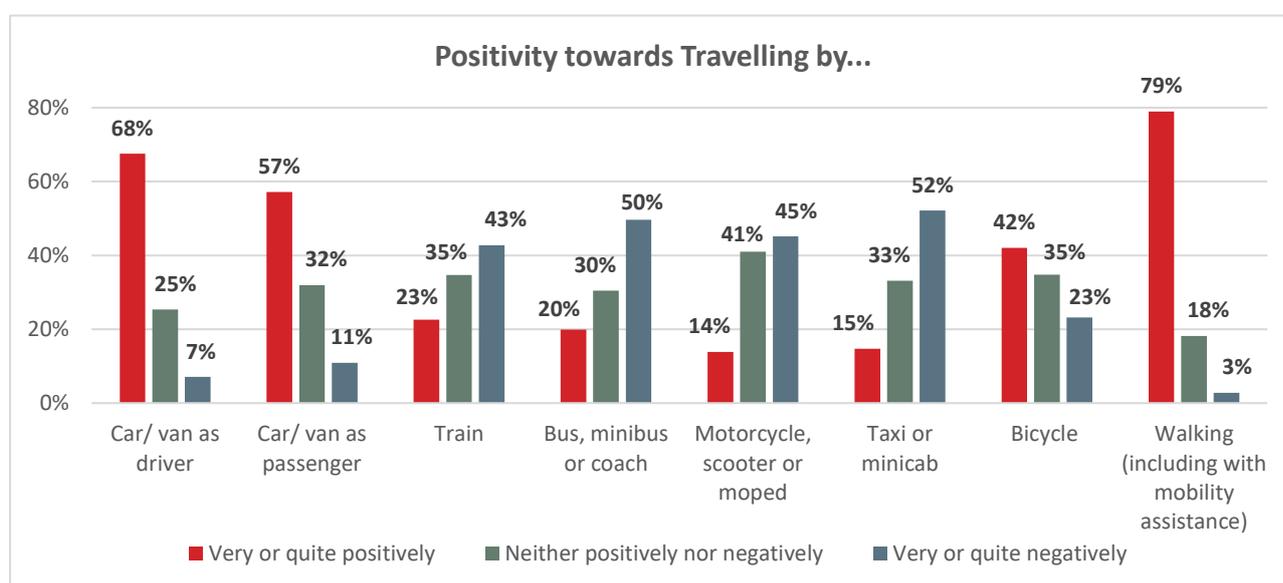


### 3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

#### 3.1 Positivity and negativity towards travelling by different methods

3.1.1 Over two thirds (68%) of respondents reported that they felt positively towards travelling by car or van as a driver, and over half (57%) felt this way as a passenger. Almost four fifths (79%) felt positively towards walking, while over two fifths (42%) felt positively towards travelling by bicycle.

3.1.2 Respondents generally reported that they felt negatively towards travelling by public transport. Around half felt this way towards travelling by taxi or minicab (52%) and by bus, minibus or coach (50%), while over two fifths (43%) felt negatively towards travelling by train.



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

- Concern over catching coronavirus/other illness (54%);
- Concerns that social distancing may not be in place (49%);
- Cost/ too expensive (42%);
- Behaviour of other passengers (40%);
- Travelling by car is easier / more convenient (39%).

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

- Concern over catching coronavirus/other illness (59%);
- Concerns that social distancing may not be in place (52%);
- Travelling by car is easier / more convenient (44%);
- Behaviour of other passengers (43%);
- Lack of cleanliness on board (30%).

## 3.2 Current Safety Concerns and Measures

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

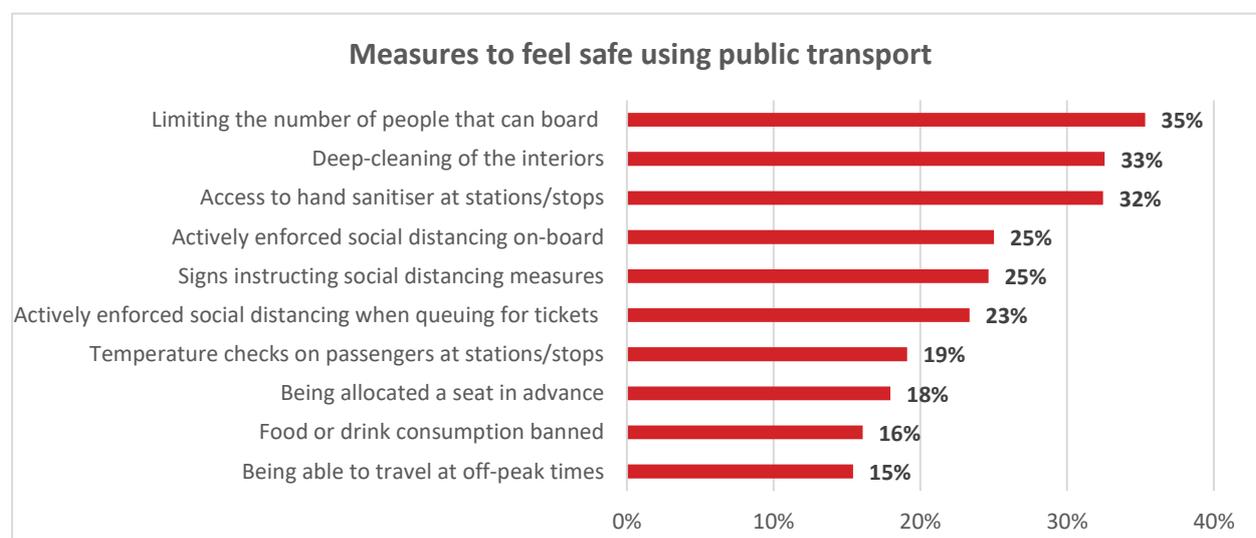
- Public transport (75%);
- Taxis/minicabs (72%);
- Shared transport methods, including car clubs or car sharing (72%).

3.2.2  Compared to the Scottish population, respondents in the Nestrans region were more likely to report being concerned about people spreading or contracting the virus whilst using public transport (75% vs 68%) and travelling by taxi or minicab (72% vs 47%).

3.2.3 Almost seven in ten respondents (69%) did however agree that the use of face coverings on public transport makes them feel safer.

3.2.4 Over a third of respondents (35%) reported that limiting the number of people that can board the train, tram or bus would make them feel safer using public transport when travelling over the next month.

3.2.5 Around a third cited deep cleaning of the interiors of vehicles, stations and bus stops (33%) and access to hand sanitiser at stations and stops (32%) would make them feel safer. A quarter cited actively enforced social distancing on-board (25%) and signs instructing social distancing measures (25%) would make them feel safer.



3.2.6 Conversely, over a quarter (28%) reported that no measures would make them feel safer to use public transport over the next month or so. This is a continued increase from Waves 1 and 2 (both 17%) and Wave 3 (22%). Whilst around a fifth (18%) of respondents 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 (51% and 32% respectively). Walking and cycling have also been used to replace journeys that normally would have been made another way (31% and 15% respectively).

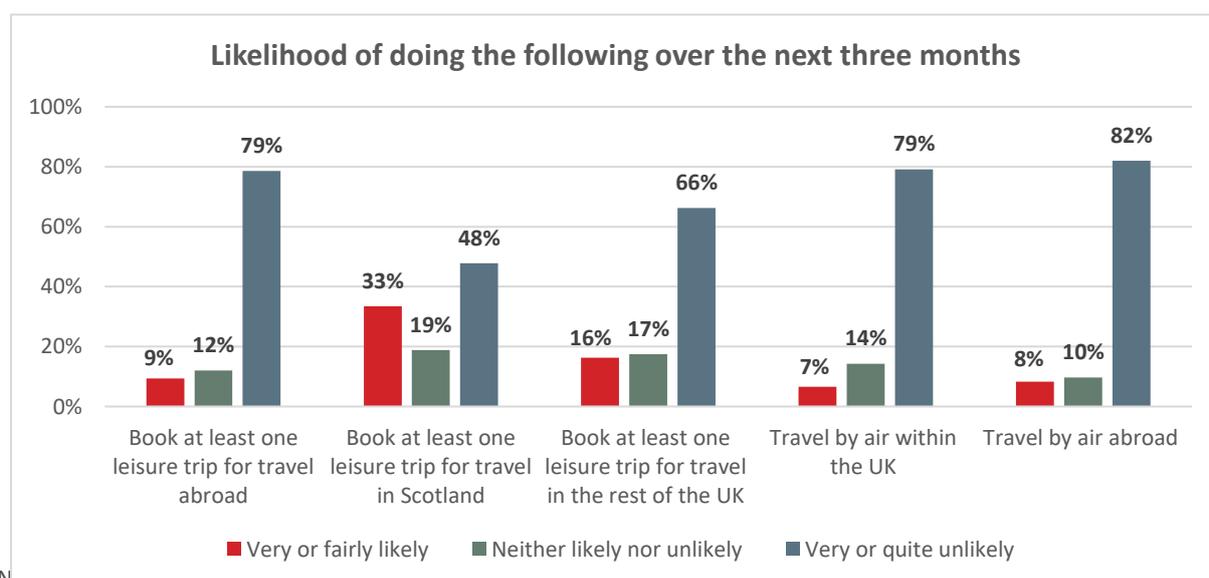
4.1.2 Positively, the majority of respondents expect that they will maintain these increased levels of walking and cycling once Covid-19 restrictions are lifted, mainly for leisure/exercise purposes (85% and 92% respectively).

### 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 (94%); shopping (77%); visiting friends and family (68%); indoor leisure activities (69%) or outdoor leisure activities (76%). These findings are similar to the previous waves.

4.2.2 Over a quarter did anticipate a decrease in how much they would visit friends and family (28%) and travel to indoor leisure activities over the next two weeks (26%). Around a fifth (18%) anticipated a decrease in how much they would shop. This anticipated decrease is likely due to the new Covid-19 measures which were implemented during the survey period, specifically new rules meaning individuals would not be allowed to make indoor social visits to other households.

4.2.3 A third (33%) 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 (16%) or abroad (8%) over the next three months. While this is a decrease in the proportion of respondents who reported that they would undertake a leisure trip in the next three months, this could be due to the changing seasons, but may also be due to the stricter measures which have been implemented.



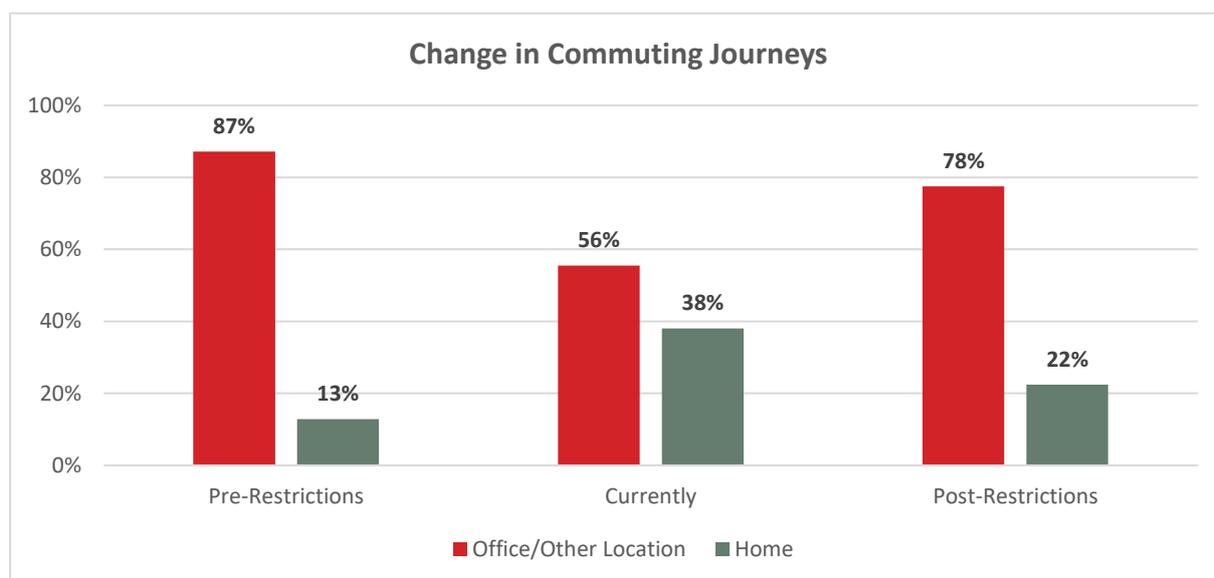
## 5. COMMUTE AND BUSINESS TRIPS

### 5.1 Commuting Trips

5.1.1 Of the 64% of respondents who reported that they were working before Covid-19 restrictions, three-quarters (77%) were working full-time (i.e. five days a week or more) and a quarter (24%) 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 decreased to 56% of their working time, while 38% are working from home and 9% are furloughed.

5.1.3 Once all restrictions are lifted, respondents predict making commuting journeys on 78% of their working days, equivalent to about a 9% reduction in commuting journeys. This reduction has been consistent across the waves.



5.1.4 Over two fifths (42%) of respondents would like to work more flexibly, with more flexible working hours (21%); changing start/finish times (17%); and/or working the same hours over fewer days (11%).

### 5.2 Journey Time and Mode

5.2.1 Typical journey time for commutes does not vary much from before Covid-19 restrictions, for those still commuting currently, and expected journey times once restrictions are lifted. The majority of journeys were reported to take 11-30 minutes.

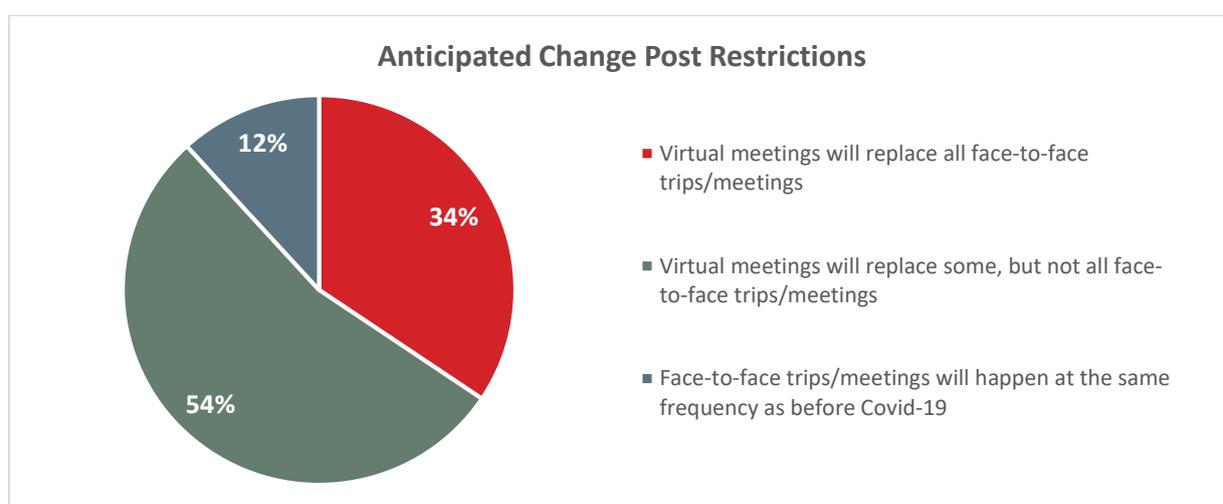
5.2.2 Respondents expect to travel to work by car or van as either a passenger or driver similar amounts once restrictions are lifted (72%), as to before restrictions were in place (70%).

Respondents anticipate using public transport slightly less post restrictions for their commute (9%), compared to use before restrictions (12%).

## 5.3 Business Trips

5.3.1 Before Covid-19 restrictions, over a third (36%) of working respondents took part in business meetings, with the majority (77%) travelling to attend between one and four business meetings in an average month.

5.3.2 Almost nine in ten respondents (88%) 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%) and Wave 3 (85%).



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