

Technical Appendix: Wave 5

1. RESEARCH METHODOLOGY

1.1 Research Objectives

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.

1.2 Survey

1.2.1 The travel behaviour and attitude surveys are being delivered through an online panel, issued every month for 10 months, from July 2020, through to March 2021. The survey covers the following topic areas:

- Travel behaviour in the past seven days;
- Predicted travel behaviour if no restrictions were in place;
- Recalled travel behaviour before restrictions were implemented;
- Attitudes towards different ways of travelling;
- Anticipated travel behaviour over the next couple of weeks;
- Changes to walking and cycling habits;
- Anticipated changes to commutes and business meetings.

2. DEMOGRAPHICS

2.1 Data Tables

2.1.1 The following data tables reflect the demographic composition of the Wave 5 survey sample. These data tables are unweighted.

| Age and Gender | | | |
|----------------|------|--------|-------|
| | Male | Female | Total |
| 16-44 | 29 | 70 | 99 |
| 45-64 | 52 | 76 | 128 |
| 65+ | 57 | 25 | 82 |
| Total | 138 | 171 | 309 |

| Which region do you live in? | |
|------------------------------|-----|
| Aberdeenshire | 153 |
| Aberdeen City | 156 |
| Total | 309 |

3. KEY FINDINGS

3.1 Data Tables

3.1.1 The following data tables underpin the key findings in the Wave 5 Survey report. Small weighting factors have been applied to ensure the data is representative of the age and gender of residents in the Nestrans region.

| Age and Gender | | | |
|----------------|------|--------|-------|
| | Male | Female | Total |
| 16-44 | 77 | 77 | 155 |
| 45-64 | 49 | 49 | 99 |
| 65+ | 28 | 28 | 56 |
| Total | 155 | 155 | 309 |

| Which region do you live in? | |
|------------------------------|-----|
| Aberdeenshire | 136 |
| Aberdeen City | 173 |
| Total | 309 |

| In the past seven days, how many times have you left your home to go.... | | | | | | |
|--|------|--------------------------|----------|----------------------|---------------------------|----------------------------|
| | Work | Drop off child to school | Shopping | Visit Friends/Family | Indoor leisure activities | Outdoor leisure activities |
| Once | 6% | 5% | 27% | 25% | 9% | 11% |
| 2-3 times | 7% | 4% | 52% | 17% | 10% | 29% |
| 4-5 times | 19% | 12% | 10% | 4% | 2% | 11% |
| 6-7 times | 7% | 0% | 2% | 2% | 1% | 8% |
| 8 or more times | 1% | 2% | 1% | 0% | 1% | 4% |
| I have not made this journey in the past seven days | 60% | 78% | 8% | 53% | 77% | 37% |

| If there were not any Covid-19 travel restrictions and guidance in place, how many times do you think you would have left your home to go to the following places in the past seven days? | | | | | | |
|---|------|--------------------------|----------|----------------------|---------------------------|----------------------------|
| | Work | Drop off child to school | Shopping | Visit Friends/Family | Indoor leisure activities | Outdoor leisure activities |
| Once | 3% | 3% | 17% | 29% | 24% | 18% |
| 2-3 times | 8% | 7% | 57% | 46% | 33% | 33% |
| 4-5 times | 38% | 12% | 17% | 8% | 6% | 14% |
| 6-7 times | 7% | 2% | 4% | 3% | 3% | 9% |
| 8 or more times | 1% | 1% | 2% | 1% | 0% | 3% |
| I would not have made this journey | 43% | 74% | 3% | 13% | 33% | 23% |

| In the past seven days, when undertaking trips for going to the following, which way have you travelled most often? | | | | | | |
|---|------|--------------------------|----------|----------------------|---------------------------|----------------------------|
| | Work | Drop off child to school | Shopping | Visit Friends/Family | Indoor leisure activities | Outdoor leisure activities |
| Car/ van as driver | 53% | 41% | 52% | 41% | 51% | 33% |
| Car/ van as passenger | 6% | 16% | 18% | 23% | 17% | 6% |
| Train | 1% | 0% | 1% | 2% | 8% | 0% |
| Bus, minibus or coach | 15% | 4% | 4% | 6% | 5% | 4% |
| Motorcycle, scooter or moped | 0% | 0% | 0% | 0% | 0% | 1% |
| Taxi or minicab | 0% | 0% | 0% | 0% | 0% | 0% |
| Bicycle | 2% | 0% | 0% | 1% | 1% | 5% |
| Walking (including with mobility assistance) | 21% | 39% | 24% | 27% | 18% | 49% |
| Other | 2% | 0% | 1% | 0% | 0% | 2% |

Thinking about before Covid-19 travel restrictions and guidance, when undertaking trips for the following, which way did you travel most often?

| | Work | Drop off child to school | Shopping | Visit Friends /Family | Indoor leisure activities | Outdoor leisure activities |
|--|------|--------------------------|----------|-----------------------|---------------------------|----------------------------|
| Car/ van as driver | 55% | 53% | 57% | 51% | 54% | 34% |
| Car/ van as passenger | 5% | 5% | 16% | 21% | 14% | 14% |
| Train | 3% | 1% | 0% | 2% | 1% | 2% |
| Bus, minibus or coach | 10% | 4% | 6% | 7% | 11% | 0% |
| Motorcycle, scooter or moped | 0% | 1% | 1% | 1% | 0% | 0% |
| Taxi or minicab | 0% | 1% | 0% | 0% | 0% | 0% |
| Bicycle | 3% | 0% | 0% | 1% | 1% | 3% |
| Walking (including with mobility assistance) | 22% | 35% | 19% | 18% | 17% | 45% |
| Other | 2% | 0% | 0% | 0% | 0% | 2% |

Currently, are you more likely, or less likely to do each of the following compared to before Covid-19 travel restrictions were put in place?

| | More likely | About the same | Less likely |
|---|-------------|----------------|-------------|
| Use home delivery for supermarket/ grocery shopping | 38% | 43% | 19% |
| Shop in-store closer to home | 38% | 54% | 8% |
| Cycle for leisure | 23% | 57% | 21% |
| Walk/wheel (mobility aid) for leisure | 41% | 50% | 9% |
| Use a car to get around | 18% | 61% | 21% |
| Use a bus or train to get around | 4% | 38% | 58% |

Currently, how positively or negatively do you feel about following ways of travelling?

| | Very or quite positively | Neither positively nor negatively | Very or quite negatively |
|--|--------------------------|-----------------------------------|--------------------------|
| Car/ van as driver | 65% | 27% | 8% |
| Car/ van as passenger | 59% | 29% | 11% |
| Train | 16% | 39% | 44% |
| Bus, minibus or coach | 18% | 32% | 50% |
| Motorcycle, scooter or moped | 16% | 40% | 44% |
| Taxi or minicab | 14% | 37% | 50% |
| Bicycle | 41% | 33% | 26% |
| Walking (including with mobility assistance) | 78% | 20% | 3% |

| Why do you feel negatively towards travelling by train? (Top 5) | |
|---|-----|
| Concern over catching coronavirus/other illness | 51% |
| Concerns that social distancing may not be in place | 50% |
| Behaviour of other passengers | 45% |
| Cost/ too expensive | 41% |
| Overcrowded | 39% |

| Why do you feel negatively towards travelling by bus? (Top 5) | |
|---|-----|
| Concern over catching coronavirus/other illness | 55% |
| Behaviour of other passengers | 50% |
| Concerns that social distancing may not be in place | 48% |
| Travelling by car is easier / more convenient | 47% |
| Lack of cleanliness on board | 38% |

| Thinking about travelling over the next month or so, which of the following would make you feel safer to use public transport? (Top 5) | |
|--|-----|
| Deep-cleaning of the interiors of vehicles, stations and bus stops | 34% |
| Access to hand sanitiser at stations/stops | 32% |
| Limiting the number of people that can board the train/tram/bus | 30% |
| Actively enforced social distancing on-board, through staff presence and CCTV | 26% |
| Signs instructing social distancing measures | 22% |

| Currently, how positively or negatively do you feel about following ways of travelling? | | | |
|--|----------------------------|----------------------------|-------------------------------|
| | Strongly or somewhat agree | Neither agree nor disagree | Strongly or somewhat disagree |
| I am concerned about people spreading or contracting the virus whilst using public transport | 75% | 15% | 9% |
| I am concerned about people spreading or contracting the virus whilst using taxis/minicabs | 75% | 17% | 8% |
| I am concerned about people spreading or contracting the virus whilst using shared transport methods, including car clubs or car sharing | 78% | 15% | 6% |
| The use of face coverings on public transport makes me feel safer | 67% | 24% | 9% |

| Do you think you will change how much you travel for the following reasons, over the next couple of weeks or so? | | | |
|--|----------|-----------|----------|
| | Increase | No change | Decrease |
| Work | 2% | 87% | 11% |

| | | | |
|-----------------------------------|-----|-----|-----|
| Drop off child to school | 3% | 90% | 7% |
| Shopping | 9% | 79% | 12% |
| Visit Friends/Family | 6% | 74% | 19% |
| Indoor leisure activities | 7% | 70% | 23% |
| Outdoor leisure activities | 12% | 75% | 14% |

| How likely, or unlikely, are you to do the following, over the next three months? | | | |
|--|-----------------------|-----------------------------|------------------------|
| | Very or fairly likely | Neither likely nor unlikely | Very or quite unlikely |
| Book at least one leisure trip for travel abroad | 15% | 12% | 73% |
| Book at least one leisure trip for travel in Scotland | 33% | 15% | 51% |
| Book at least one leisure trip for travel in the rest of the UK | 19% | 16% | 65% |
| Travel by air within the UK | 11% | 11% | 78% |
| Travel by air abroad | 10% | 10% | 79% |

| Since the Covid-19 travel restrictions, has the average amount of time you spend walking and cycling per week for the following purposes changed? | | | |
|--|----------|-----------|----------|
| | Increase | No change | Decrease |
| Walking: for leisure/exercise | 46% | 43% | 11% |
| Walking: for commute/business/education | 16% | 67% | 18% |
| Walking: to replace a journey I would normally make another way | 29% | 64% | 6% |
| Cycling: for leisure/exercise | 28% | 62% | 11% |
| Cycling: for commute/business/education | 15% | 74% | 11% |
| Cycling: to replace a journey I would normally make another way | 16% | 75% | 9% |

| How likely are you to continue the increase after the Covid-19 travel restrictions are lifted? | | | |
|---|-----------------------|-----------------------------|------------------------|
| | Very or fairly likely | Neither likely nor unlikely | Very or quite unlikely |
| Walking: for leisure/exercise | 85% | 11% | 4% |
| Cycling: for leisure/exercise | 84% | 14% | 2% |

| Working Location | | | |
|------------------------------|------------------|-----------|-------------------|
| | Pre-Restrictions | Currently | Post-Restrictions |
| Office/Other Location | 91% | 53% | 78% |
| Home | 9% | 39% | 22% |

| Before Covid-19 travel restrictions, on average, how long did a typical journey to/from work take? | |
|---|-----|
| 5 mins or less | 7% |
| 6-10 mins | 14% |

| | |
|------------|-----|
| 11-20 mins | 30% |
| 21-30 mins | 24% |
| 31-40 mins | 9% |
| 41+ mins | 15% |

| Currently, on average, how long does a typical journey to/from work take? | |
|---|-----|
| 5 mins or less | 12% |
| 6-10 mins | 22% |
| 11-20 mins | 25% |
| 21-30 mins | 24% |
| 31-40 mins | 8% |
| 41+ mins | 10% |

| Once all restrictions due to Covid-19 have been lifted, and assuming you stay in the same or similar role, on average, how long do you think a typical journey to/from work will take? | |
|--|-----|
| 5 mins or less | 8% |
| 6-10 mins | 16% |
| 11-20 mins | 26% |
| 21-30 mins | 24% |
| 31-40 mins | 11% |
| 41+ mins | 15% |

| Once all restrictions due to Covid-19 have been lifted, and assuming you stay in the same or similar role, which way of travelling to/from work do you think you will use most often? | |
|---|-----|
| Car/ van as driver | 53% |
| Car/ van as passenger | 6% |
| Train | 4% |
| Bus, minibus or coach | 10% |
| Bicycle | 4% |
| Walking (including with mobility assistance) | 21% |
| Other | 3% |

| Once all restrictions due to Covid-19 have been lifted, do you want to make changes to the times that you work, compared with before Covid-19? | |
|--|-----|
| Yes – I would like to change the time of day that I start/finish work | 17% |
| Yes – I would like to work the same hours over fewer days | 14% |
| Yes – I would like my hours to be more flexible generally | 26% |
| Yes – other | 1% |
| No – I do not want to make changes | 56% |

| Before Covid-19 travel restrictions, in an average month, about how many business meetings did you travel to attend outside of your regular workplace? | |
|---|------------|
| 1-2 | 14% |
| 3-4 | 11% |
| 5-6 | 9% |
| 7-8 | 2% |
| 9-10 | 2% |
| More than 10 a month | 1% |
| Not applicable – did not travel for business meetings | 62% |

| Once all restrictions have been lifted after Covid-19, do you think there will be changes to how often you travel outside of your regular workplace to conduct business trips/meetings? | |
|--|------------|
| Virtual meetings will replace all face-to-face trips/meetings | 28% |
| Virtual meetings will replace some, but not all face-to-face trips/meetings | 49% |
| Face-to-face trips/meetings will happen at the same frequency as before Covid-19 | 19% |
| Face-to-face trips/meetings will happen more frequently than before Covid-19 | 4% |

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