NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 5 REPORT (SURVEY UNDERTAKEN BETWEEN 12TH OCTOBER AND 20TH OCTOBER 2020)

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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 some overlap across the waves.

1.2 This Report

1.2.1 This report covers the main findings from Wave 5 of 10 Waves. The data was collected between Monday 12th October 2020 and Tuesday 20th October 2020.

1.2.2 Comparisons made with the Scottish population use data from Transport Scotland's Public Attitudes survey, for which fieldwork was undertaken between 30th September 2020 and 6th October 2020[1].

1.2.3 Comparisons made to the UK population use data from Transport Focus: Travel during Covid-19 tracking research, for which fieldwork was undertaken between 16th October and 18th October 2020[2].

1.2.4 A total of 309 respondents took part in this survey wave. The sample is fairly evenly split between the two council areas; 44% of respondents were from Aberdeenshire and 56% 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.

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

1.2.6 The guidelines for Covid-19 during the Wave 5 survey period included[3]:

- Individuals should not meet people from any other households in their home or another person's home socially, unless they are in their extended household;
- Individuals can only meet people outside, in their garden or a public space in groups of up to six people from no more than two households;
- Individuals should limit the number of people they see a day;
- Individuals should continue to stay two meters apart from anyone not in their household;

[1] https://www.transport.gov.scot/publication/covid-19-public-attitudes-survey-data-wave-9/
[2] https://www.transportfocus.org.uk/research-publications/publications/travel-during-covid-19-survey-week-25/
[3] https://www.gov.scot/publications/coronavirus-covid-19-what-you-can-and-cannot-do/pages/overview/

- Individuals should minimise public transport use as much as possible, and are asked to walk, drive and cycle when possible to save space on public transport for those who need it;
- Individuals should not travel to Lothian, Lanarkshire; Forth Valley; Ayrshire & Arran; Greater Glasgow & Clyde unless they need to;
- Premises may only open indoors between 6am and 6pm, with no sale of alcohol;
- Premises may open outdoors until 10pm, including for the sale of alcohol, if licensed to do so;
- Individuals are advised to access goods, services and activities in their local area as much as possible;
- Customers must wear face covering in shops, other retail and public transport.

1.2.7 October half term for schools in Aberdeenshire and Aberdeen City took place between Monday 12 October to Friday 23 October 2020[4].

1.2.8 In line with the Getabout adverts to encourage active travel, radio adverts were played on Original FM and North Sound radio stations from the end of July 2020 until October 2020[5].

[4] https://www.mygov.scot/school-term-holiday-dates/
[5] https://www.getabout.org.uk/

2. JOURNEYS IN THE LAST SEVEN DAYS

2.1.1 All respondents had made at least one type of journey in the last seven days, compared to around one in ten of the wider Scottish population (9%) who had not left their home in the last seven day for any reason.

2.1.2 In the past seven days, the most frequently made trip was for shopping, with nine in ten respondents (92%) having made this type of journey at least once, and over three quarters (79%) having made it between one and three times. More shopping trips were made in the Nestrans region compared to the rest of the UK, in which three quarters (75%) had made a shopping trip at least once in the last seven days.

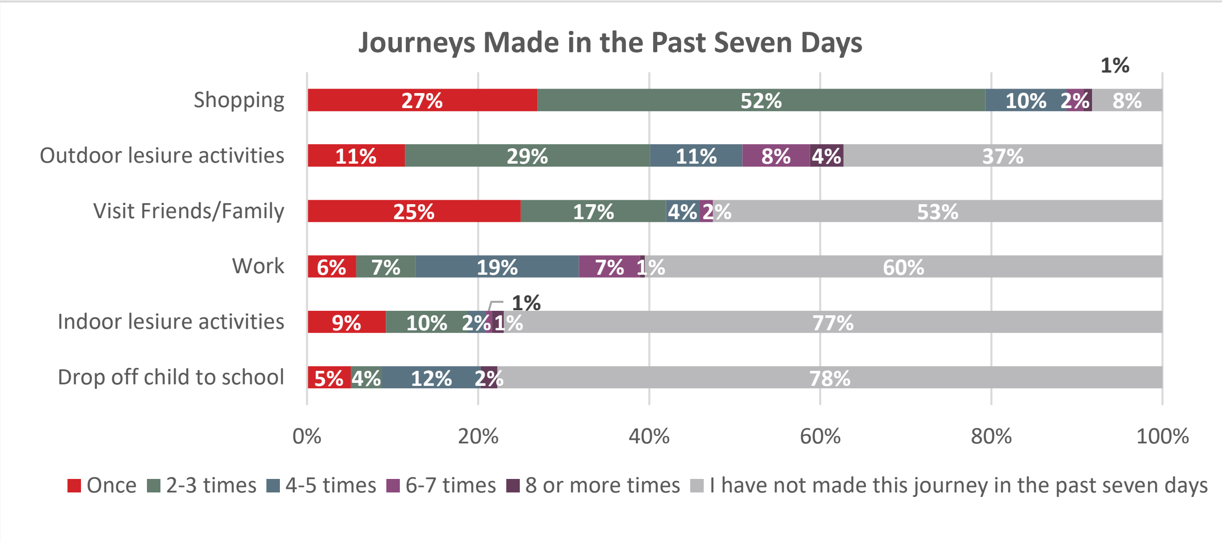
2.1.3 Almost two thirds of respondents (63%) had travelled at least once in the last seven days to undertake outdoor leisure activities, compared to just under a quarter (23%) who had travelled to indoor leisure activities. Just under half (47%) had made a journey to visit friends and family in the last seven days, a slight decrease from Wave 4 (54%), however higher than in the rest of the UK (34%).

2.1.4 Respondents from Aberdeen City were more likely to have reported making certain types of journeys at least once in the last seven days compared to those in Aberdeenshire. These journeys include dropping off a child to school (29% vs 14%); undertaking a shopping trip (95% vs 87%); and trips to indoor leisure activities (26% vs 19%).

2.1.5 Two fifths of respondents (40%) had undertaken a journey to work in the last seven days, a higher proportion than had done so in the wider Scottish population (30%) or the rest of the UK (35%).

2.1.6 Almost a quarter of respondents (22%) had dropped off a child at school or nursery in the last seven days, a slight decrease (6%) from the last wave, potentially reflective of half-term holidays.

2.1.7 The travel behaviour reported in this wave is, for most journey purposes, consistent with previous waves.



2.1.8 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, on average:

- Almost one and half times more work trips;
- Almost twice as many trips to visit family and friends;
- Almost three times as many trips for indoor leisure activities.

2.1.9 Respondents predicted similar numbers of trips for shopping, outdoor leisure activities and to drop off their child at school.

2.2 Ways of travelling

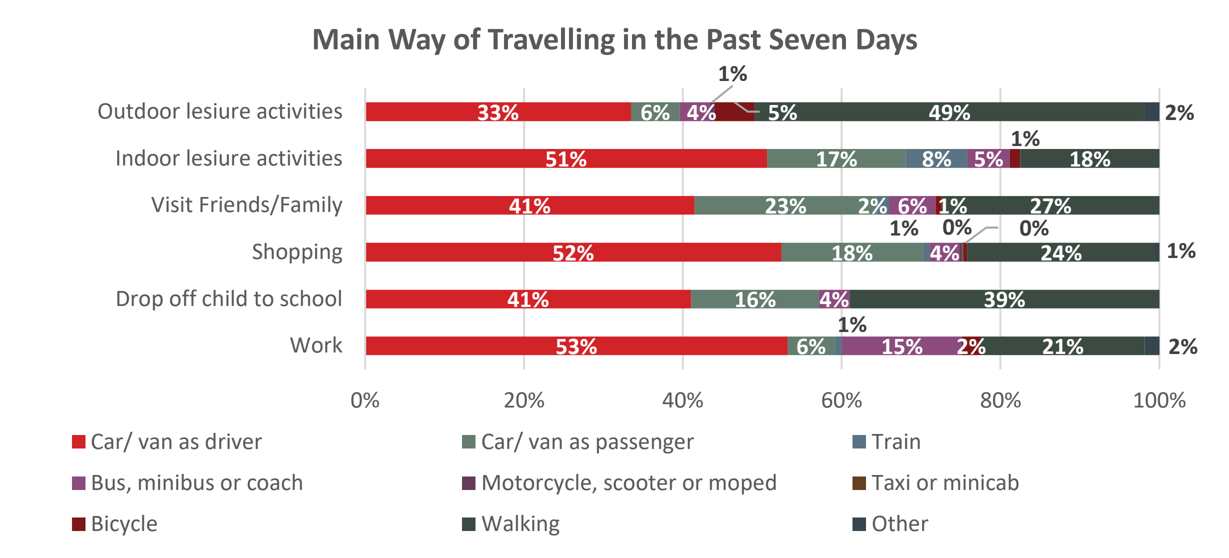
2.3 Similar to previous waves, travelling by car, as a driver or passenger, was the most frequently used main way of travelling for all journey types, with the exception of journeys for outdoor leisure activities, where walking (49%) was more frequently used than the car (40%). Notably, seven in ten (70%) of the wider Scottish population travelled to outdoor exercise by walking.

2.3.1 Almost two fifths of respondents (39%) walked as their main way to drop off their child at school; around a quarter travelled this way to visit friends and family (27%) and to undertake shopping trips (24%); and around a fifth walked as their main way to travel to work (21%) and indoor leisure activities (18%).

2.3.2 Notably, less than 6% travelled by bicycle as their main way of travelling for each specified journey purpose, similar to the rest of the UK in which only 5% had made a journey by bicycle in the last seven days.

2.3.3 When travelling to work in the last seven days, those in Aberdeenshire were more likely to have reported travelling by a private vehicle than those in Aberdeen City (74% vs 51%). Those in Aberdeen City, however, were more likely to have travelled to work by public or shared transport (21% vs 8%) and by bicycle or by walking (27% vs 17%) than those in Aberdeenshire.

2.3.4 In general, the main way of travelling does not vary much between this survey period and before Covid-19 restrictions were introduced

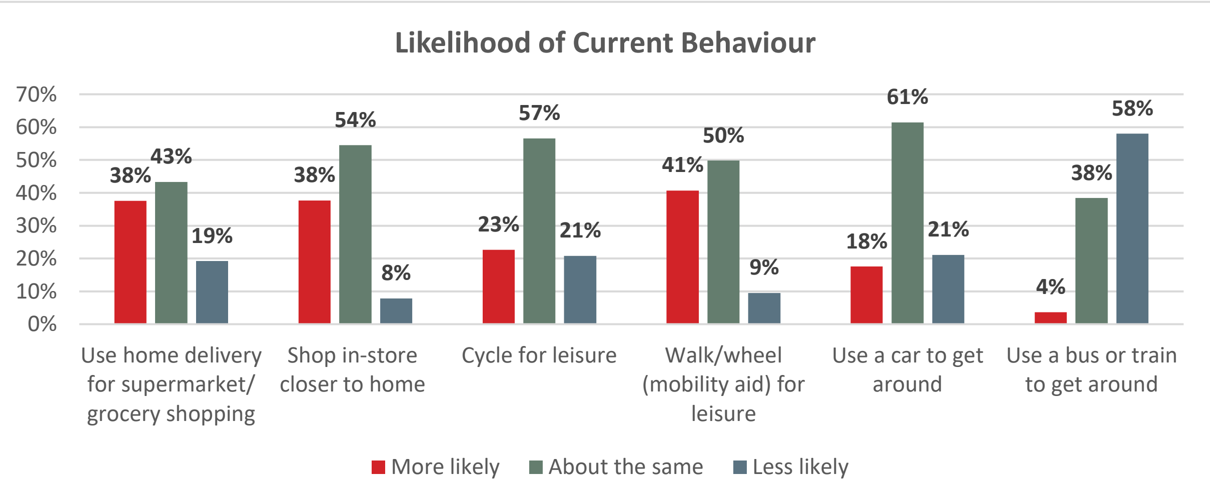


2.4 Changes in Current Behaviour

2.4.1 During the survey period, respondents have continued to report changes to the way they shop, compared to before Covid-19 travel restrictions were put in place. Almost two fifths (38%) reported that they were more likely to use home delivery for supermarket shopping, as well as shop in-store closer to home, than before restrictions were put in place.

2.4.2 Respondents also suggested that they were more likely to engage in physical activity for leisure purposes than before Covid-19 restrictions, with almost a quarter (23%) reporting that they were more likely to cycle for such purposes, and over two fifths (41%) reporting that they were more likely to walk or wheel. This is a slight increase from Wave 4 (19% and 37% respectively).

2.4.3 Over half of respondents (58%) reported that they were less likely to use a bus or train to get around than before Covid-19 travel restrictions were put in place, slightly fewer than in the previous wave (62%).



3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

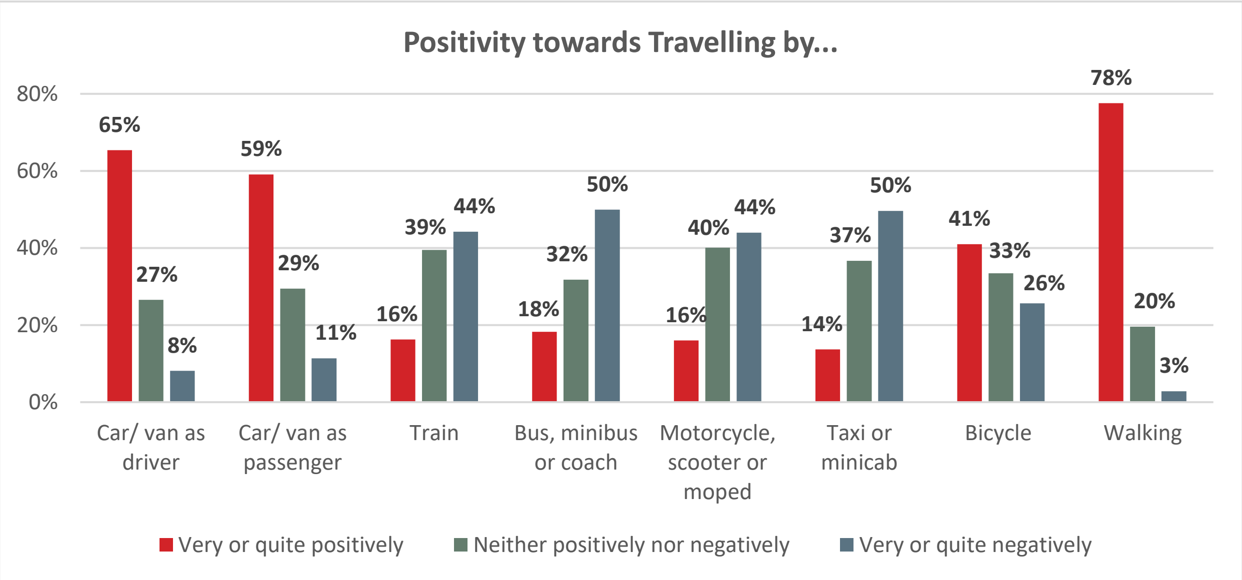
3.1 Positivity and negativity towards travelling by different methods

3.1.1 Almost two thirds of respondents reported that they felt positively towards travelling by car or van as a driver (65%) and slightly fewer as a passenger (59%). Over three quarters (78%) felt positively towards walking, while less than half (41%) felt positively towards travelling by bicycle.

3.1.2 More than twice as many respondents felt negatively towards travelling by public and shared transport, than felt positively. Half felt negatively towards travelling by taxi or minicab (50%) and by bus, minibus or coach (50%), while slightly fewer (44%) felt negatively towards travelling by train.

3.1.3 These feelings of positivity and negativity towards different ways of travelling are identical to Wave 4, and are largely similar to previous waves.

3.1.4 Respondents from Aberdeenshire were more likely to feel positively towards travelling by car or van as a driver than those form Aberdeen City (72% vs 60%). Respondents from Aberdeen City were more likely to feel positively towards travelling by bus than those from Aberdeenshire (23% vs 12%).



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

- 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%).

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

- 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%).

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 (75%);
- Shared transport methods, including car clubs or car sharing (78%).

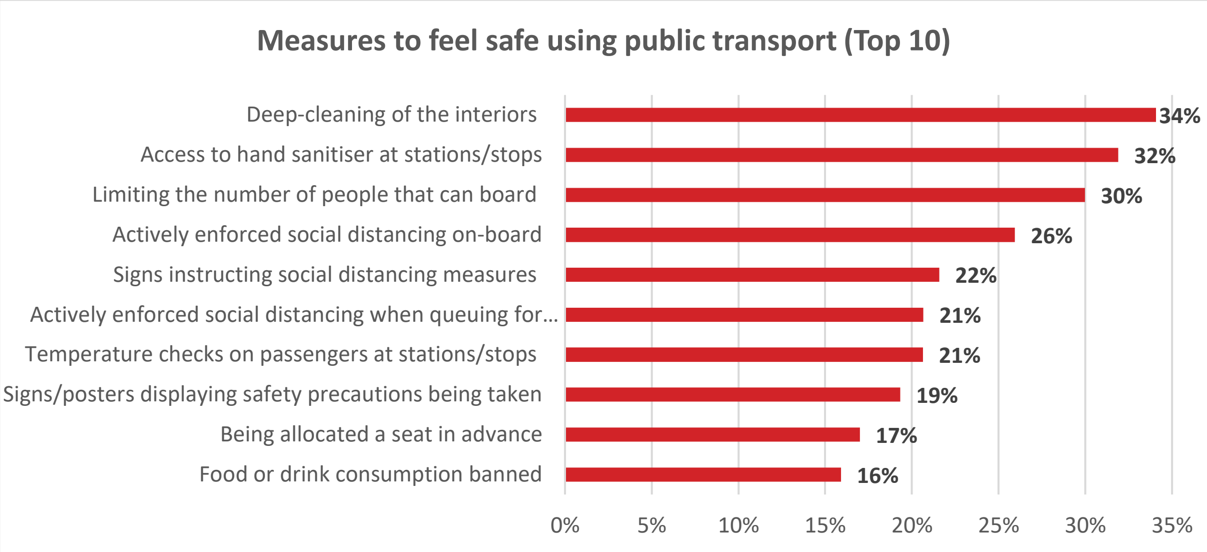
3.2.2 A higher proportion of respondents in the Nestrans region reported concern about contracting or spreading the virus while on public transport compared to respondents in the wider Scottish population (75% vs 68%).

3.2.3 Respondents in Aberdeen City were more likely to be concerned about people spreading or contracting the virus whilst using a taxi, than those in Aberdeenshire (81% vs 68%).

3.2.4 Over two thirds of respondents (67%) felt that the use of face coverings on public transport makes them feel safer. Notably, respondents from cities or large town centres/suburbs were more likely to agree with this notion than those from a small towns, villages or rural areas (73% vs 60%).

3.2.5 Around a third of respondents suggested deep cleaning of the interiors of vehicles, stations and bus stops (34%), access to hand sanitiser at stations and stops (32%), and limiting the number of people that can board the train/tram/bus (30%), would make them feel safer.

3.2.6 Around a quarter of respondents suggested actively enforced social distancing on-board, through staff presence and CCTV (26%), and signs instructing social distancing measures (22%) would also make them feel safer.



3.2.7 One in five respondents (20%) suggested that they already felt safe using public transport. Conversely, almost a quarter (23%) reported that no measures would make them feel safer when using public transport over the next month or so.

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 (46% and 28% respectively). Walking and cycling have also been used to replace journeys that normally would have been made another way (29% and 16% respectively). This is a slight decrease in respondents who have reported walking and cycling more from Wave 4.

4.1.2 Respondents in Aberdeen City were more likely than those in Aberdeenshire to report an increase in walking to replace a journey that they would otherwise have made another way since Covid-19 travel restriction (35% vs 20%).

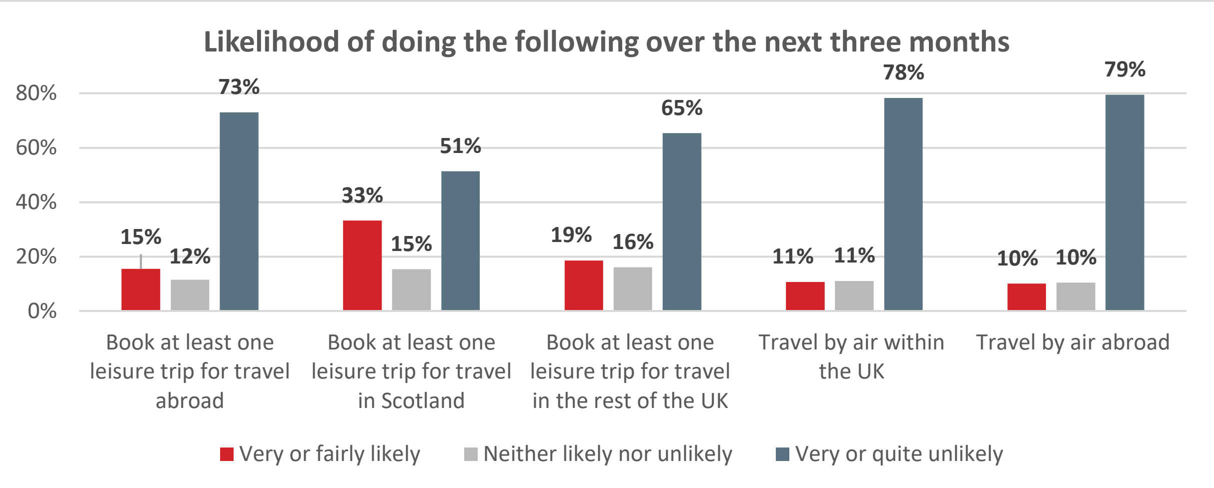
4.1.3 The majority of respondents expect that they will maintain these increased levels of walking and cycling once Covid-19 restrictions are lifted, mainly for leisure/exercise purposes (85% and 84% respectively).

4.2 Travelling further afield

4.2.1 The majority of respondents did not anticipate changes to how much they will travel in the next couple of weeks for: work (87%); to drop off their child to school (90%); shopping (79%); visiting friends and family (74%); indoor leisure activities (70%) or outdoor leisure activities (75%). These findings are similar to the previous waves.

4.2.2 Almost a quarter of respondents (23%), however, anticipated a decrease in how much they will travel for indoor leisure activities, while a just under a one in five (19%) anticipated a decrease in how much they will visit friends and family.

4.2.3 A third of respondents (33%) thought it likely that they would book a leisure trip for travel in Scotland in the next three months, many more thought they would book one in the rest of the UK (19%) or abroad (15%). Interestingly this is a slight increase in the proportion of respondents who anticipate booking a trip outside of Scotland compared to Wave 4, either in the rest of the UK (19% vs 16%) or abroad (15% vs 9%).



5. COMMUTE AND BUSINESS TRIPS

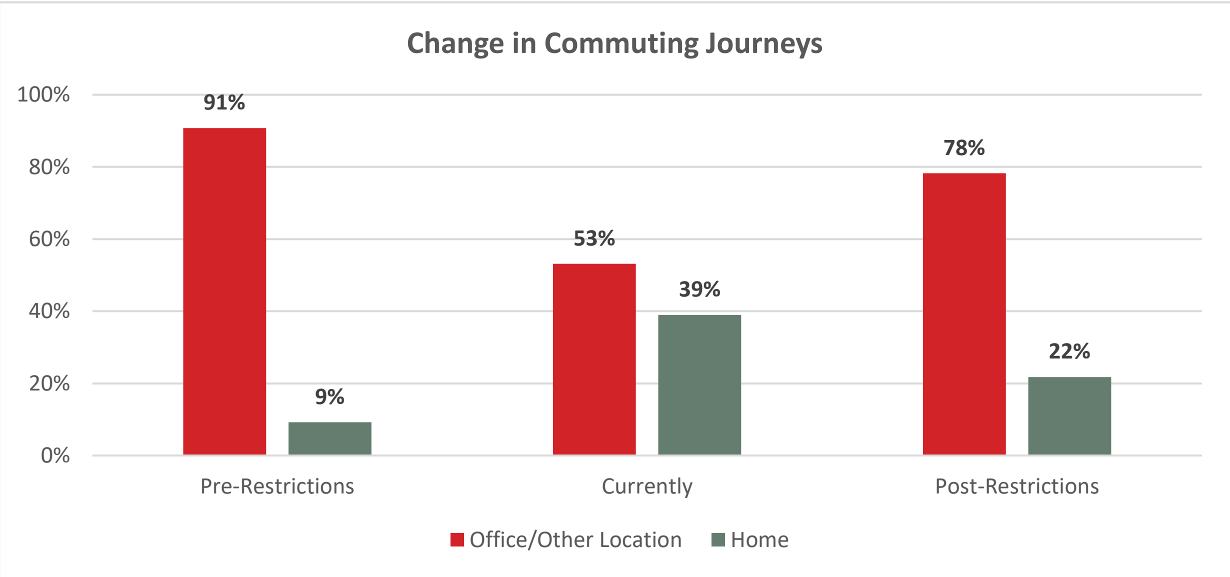
5.1 Commuting Trips

5.1.1 Of the 64% of respondents who reported that they were working before Covid-19 restrictions, around three-quarters (76%) were working full-time (i.e. five days a week or more) and around a quarter (24%) were working part-time.

5.1.2 On average, respondents were making commuting journeys (i.e. not working from home) on 91% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 53% of their working days, while 39% of their days are working from home and 8% are furloughed.

5.1.3 Once all restrictions are lifted, respondents, on average, predict making commuting journeys on 78% of their working days. This is equivalent to an average reduction in commuting journeys of 13%, from before Covid-19 restrictions. This reduction has been consistent across the waves.

5.1.4 Once all restrictions due to Covid-19 have been lifted, fewer than half of respondents (44%) would like to work more flexibly. Specifically, around a quarter (26%) would like to work with more flexible working hours, and fewer would like to change their start/finish times (17%) and work the same hours over fewer days (14%).



5.2 Journey Time and Mode

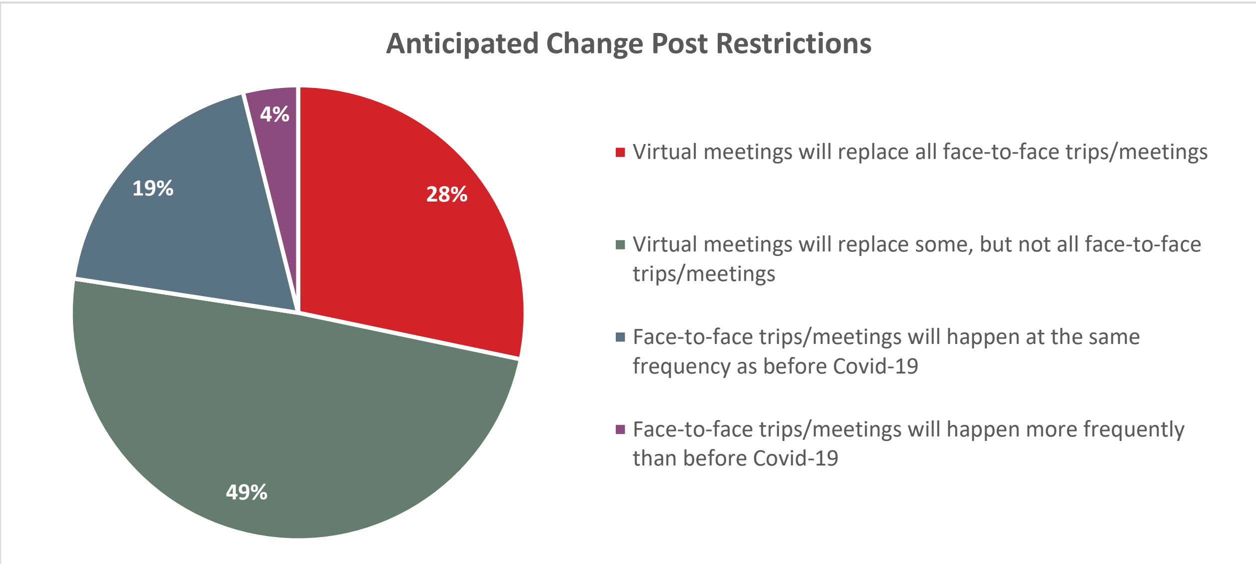
5.2.1 For respondents who are still commuting, their typical journey time has not changed much since the Covid-19 restrictions, and they do not expect journey times to change much after restrictions are lifted. The majority of journeys take between 11-30 minutes.

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 (60%), as to before restrictions were in place (61%). Respondents also anticipate using public transport a similar amount post restrictions for their commute (14%), compared to use before restrictions (14%). In contrast, over a quarter of respondents (29%) in the rest of the UK anticipate undertaking journeys by car, instead of public transport after Covid-19 restrictions are lifted.

5.3 Business Trips

5.3.1 Before Covid-19 restrictions, over a third of working respondents (38%) took part in business meetings, with the majority (64%) travelling to attend between one and four business meetings in an average month.

5.3.2 Over a quarter of working respondents (77%) expect that virtual meetings will replace some, or all face to face business meetings. This is a slight decrease from the previous two waves.



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