

# NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

## WAVE 6 REPORT (SURVEY UNDERTAKEN BETWEEN 2ND NOVEMBER AND 9TH NOVEMBER 2020)



nestrans



SYSTRA

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## IDENTIFICATION TABLE

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1	Author	Marianne Woodyard	Project Manager	18/11/2020	
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## TABLE OF CONTENTS

<b>1.</b>	<b>INTRODUCTION</b>	<b>4</b>
<b>1.1</b>	<b>APPROACH</b>	<b>4</b>
<b>1.2</b>	<b>THIS REPORT</b>	<b>4</b>
<b>2.</b>	<b>JOURNEYS IN THE LAST SEVEN DAYS</b>	<b>5</b>
<b>2.2</b>	<b>WAYS OF TRAVELLING</b>	<b>7</b>
<b>2.3</b>	<b>CHANGES IN CURRENT BEHAVIOUR</b>	<b>7</b>
<b>3.</b>	<b>FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING</b>	<b>10</b>
<b>3.1</b>	<b>POSITIVITY AND NEGATIVITY TOWARDS TRAVELLING BY DIFFERENT METHODS</b>	<b>10</b>
<b>3.2</b>	<b>CURRENT SAFETY CONCERNS AND MEASURES</b>	<b>11</b>
<b>4.</b>	<b>ANTICIPATED CHANGE IN BEHAVIOUR</b>	<b>11</b>
<b>4.1</b>	<b>CHANGES TO WALKING AND CYCLING</b>	<b>13</b>
<b>4.2</b>	<b>TRAVELLING FURTHER AFIELD</b>	<b>13</b>
<b>5.</b>	<b>COMMUTE AND BUSINESS TRIPS</b>	<b>13</b>
<b>5.1</b>	<b>COMMUTING TRIPS</b>	<b>14</b>
<b>5.2</b>	<b>JOURNEY TIME AND MODE</b>	<b>14</b>
<b>5.3</b>	<b>BUSINESS TRIPS</b>	<b>15</b>

# 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.

## 1.2 This Report

1.2.1 This report covers the main findings from Wave 6 of 10 Waves. The data was collected between Monday 2<sup>nd</sup> November to Monday 9<sup>th</sup> November 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 4<sup>th</sup> November and 9<sup>th</sup> November<sup>1</sup>.

1.2.3 Comparisons made to the UK population in this report are taken from Transport Focus: Travel during Covid-19 tracking research, fieldwork undertaken between 6<sup>th</sup> November and 8<sup>th</sup> November 2020<sup>2</sup>.

1.2.4 A total of 321 respondents took part in this survey wave. The sample is about evenly split between the two council areas; 49% of respondents were from Aberdeenshire and 51% 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 During the Wave 6 survey period, both Aberdeenshire and Aberdeen City were under Protection Level 2 Covid-19 measures. The guidelines included<sup>3</sup>:

- Individuals should not meet anyone who is not in their household indoors in their home;
- Individuals can meet another household indoors in a public place such as a café;
- The maximum number of people who can meet indoors in a public (not a home) place are six which can be from up to two separate households;

<sup>1</sup> <https://www.transport.gov.scot/publication/covid-19-public-attitudes-survey-data-wave-10/>

<sup>2</sup> <https://www.transportfocus.org.uk/research-publications/publications/travel-during-covid-19-survey-week-28/>

<sup>3</sup> <https://www.gov.scot/publications/coronavirus-covid-19-protection-levels/>

- Individuals can meet people from other households outdoors in a private garden or in a public place such as a park or an outdoor area of a pub.
- The maximum number of people who can meet outdoors is six which can be from up to two separate households;
- Restaurants, cafes, pubs and bars can open indoors for the consumption of food and non alcoholic drinks. Alcoholic drinks can only be served with the purchase of a main meal;
- Last entry is 19:00 and all venues must be closed by 20:00;
- Restaurants, cafes, pubs and bars can open outdoors for the consumption of food and alcoholic drinks. Last entry is 21:30 and all venues must be closed and all customers off the premises by 22:30;
- All holiday accommodation (Hotels, B&Bs, self-catering, caravan and camping sites) can stay open, in line with sector guidance for tourism and hospitality;
- All retailers can open providing they follow and have implemented Scottish Government guidance to ensure the safety of customers and staff;
- Individuals must wear a face covering when Individuals go into any retail premises including any indoor area of a shopping centre, unless exempt;
- Individuals are permitted to meet others outdoors, following the rules around meeting other households, for informal exercise or sport;
- The following businesses must be closed, with very limited exceptions: soft play; funfairs; indoor bowling; theatres; snooker/pool halls; concert halls; comedy clubs; casinos; nightclubs; adult entertainment;
- Cinemas and bingo halls can be open, and should operate in line with guidance, physical distancing duties, face covering regulations and other hygiene measures;
- Public buildings such as libraries or community centres can open to the public;
- All indoor and outdoor visitor attractions such as museums, zoos and aquariums can open providing there are physical distancing and hygiene measures in place.
- Schools can remain open;
- Colleges and universities can operate using blended learning;
- Essential travel only to/from level 3 or 4 areas in Scotland, and to/from rest of UK;
- Unnecessary journeys between areas in different levels must be minimised.

1.2.7 Following the Stonehaven rail derailment on 12<sup>th</sup> August, the line between Aberdeen and Dundee reopened on 3<sup>rd</sup> November<sup>4</sup>.

1.2.8 As part of the Spaces for People measures implemented in Aberdeen, a cycle lane at Aberdeen beach was introduced earlier in the year. Following criticism and safety concerns, a decision was made in October at an Aberdeen City Council meeting to remove the cycle lane<sup>5</sup>.

1.2.9 On 25<sup>th</sup> October, Daylight Saving Time ended<sup>6</sup>.

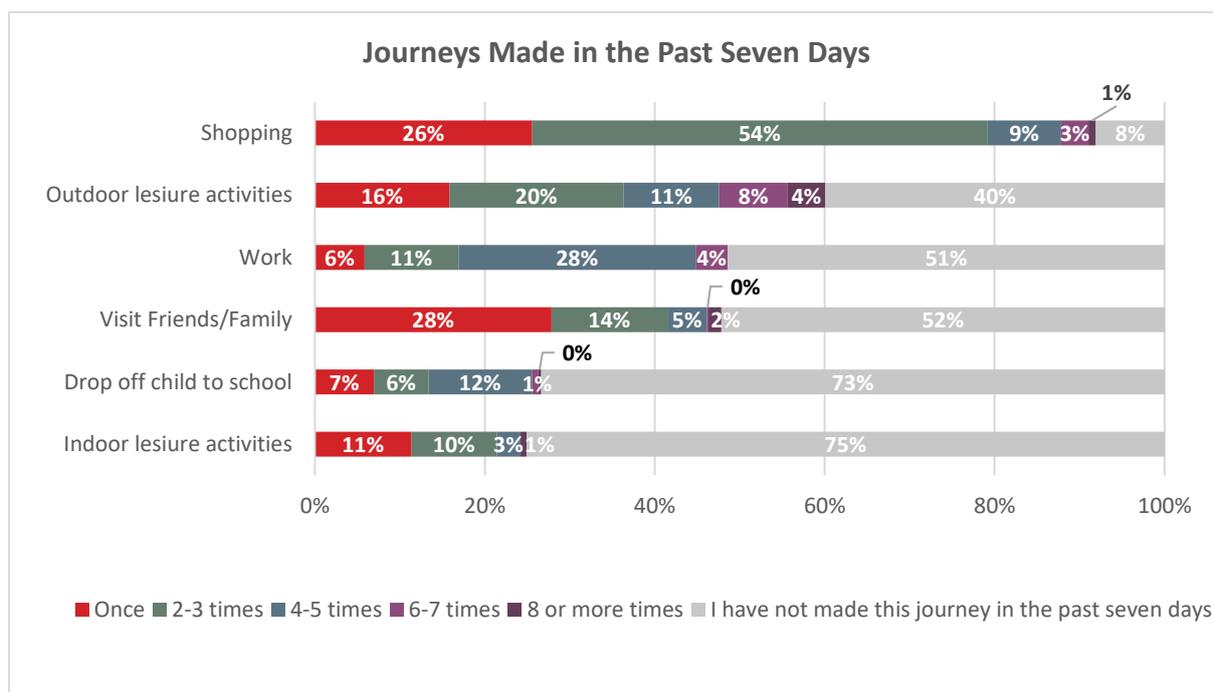
<sup>4</sup> <https://www.bbc.co.uk/news/uk-scotland-north-east-orkney-shetland-54778702>

<sup>5</sup> <https://www.eveningexpress.co.uk/fp/news/local/excessive-social-distancing-measures-at-aberdeen-beach-will-be-scrapped/>

<sup>6</sup> <https://www.timeanddate.com/time/change/uk/edinburgh#:~:text=Sunday%2C%20October%2025%2C%2020%2C%201%3A00%3A00,2020%20than%20the%20day%20before.>

## 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 around one in ten of the wider Scottish population (8%) 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 trip at least once, and four in five (79%) making this journey between one and three times.
- 2.1.3 Respondents from Aberdeen City were more likely to have undertaken at least one shopping trip in the last seven days, compared to those from Aberdeenshire (96% vs 87%).
- 2.1.4  Three out of five (60%) respondents had travelled at least once to undertake outdoor leisure activities, compared to a quarter (25%) who had travelled to indoor leisure activities. Just under half (48%) had made a journey to visit friends and family in the last seven days, which is higher than the rest of the UK (29%).
- 2.1.5 Almost half (49%) had travelled to work in the last seven days. This is an increase from Wave 5 (40%), and also higher than the wider Scottish population (28%). 
- 2.1.6 Over a quarter (27%) had travelled to drop off a child to school or nursery in the last seven days, higher than the Scottish population (10%). 
- 2.1.7 Respondents from a city, large town centre or suburb were more likely to have reported making certain types of journeys compared to those from a small town, village or rural area. These journeys included to drop off a child to school (32% vs 19%); travel to work (57% vs 38%); and undertake trips to indoor leisure activities (31% vs 17%).



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:

- Almost twice times as many average trips to visit family and friends;
- Almost three times as many average trips for indoor leisure activities.

2.1.9 Respondents predicted similar numbers shopping trips; outdoor leisure activities; and trips to drop off their child to school.

## 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 (56%) was more frequently used than the car (32%).

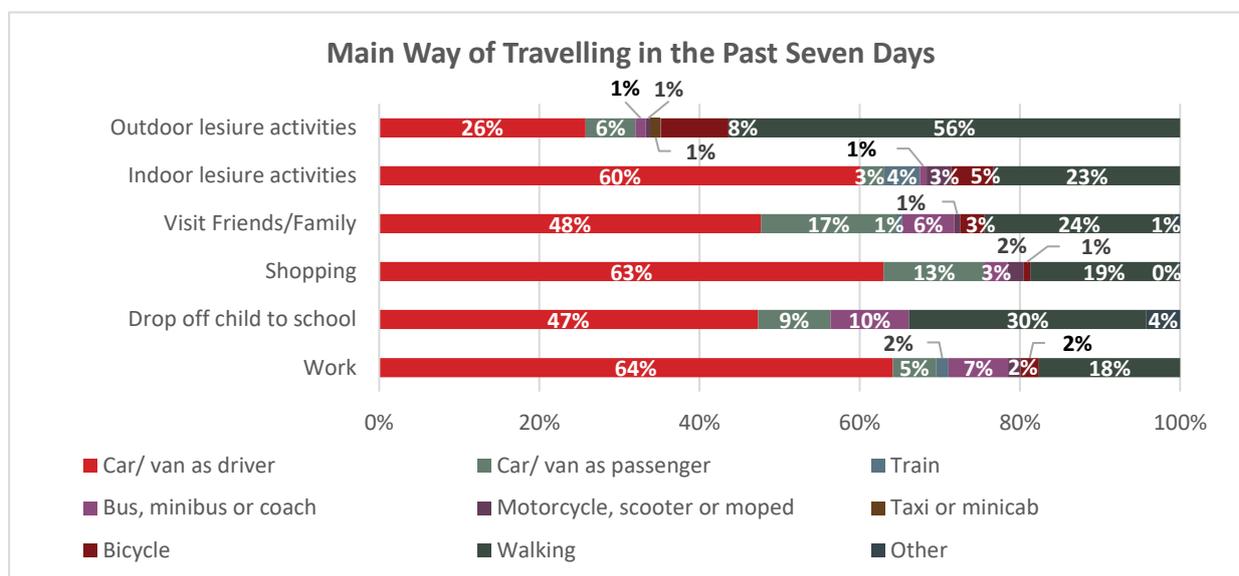
2.2.2 Almost a third (30%) of respondents travelled by walking as the main way to drop off their child to school; almost a quarter travelled this way to visit friends and family (24%); and to indoor leisure activities (23%). Almost a fifth travelled this way to undertake shopping trips (19%) and journeys to work (18%).

2.2.3 Less than 9% travelled by bicycle as their main way of travelling for the specified journeys, which is slightly more than the wider Scottish population (less than 5%).



2.2.4 More respondents reported walking as their main of travelling in the last seven days when undertaking journeys to visit friends and family (9% increase) and outdoor leisure

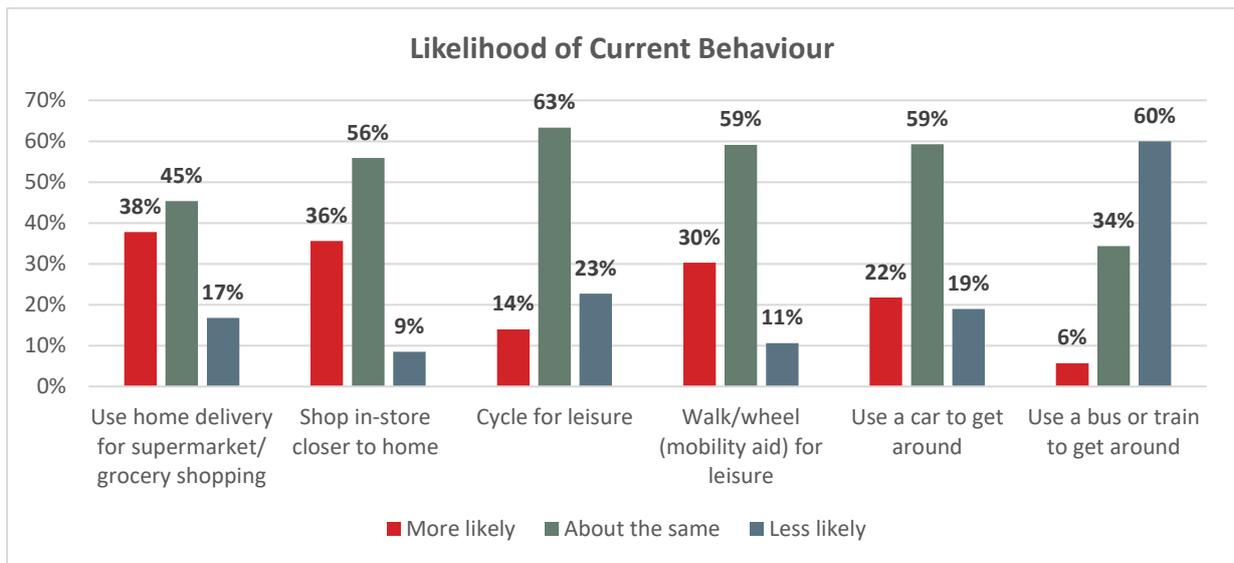
activities (10% increase), compared to before Covid-19 restrictions. Conversely, travelling by car or van as the driver was used less frequently as the main way of travelling for these two journey types compared to before Covid-19 restrictions (9% decrease and 11% decrease respectively).



## 2.3 Changes in Current Behaviour

- 2.3.1 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 than before restrictions were put in place, slightly more than the wider Scottish population (24%). Over a third (36%) reported that they are more likely to shop in-store closer to home, slightly less than the wider Scottish population (52%).
- 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 over one in ten (14%) reporting that they were more likely to cycle for such purposes, and three in ten (30%) reporting that they were more likely to walk or wheel. This is a decrease from Wave 5 (23% and 41% respectively) and may reflect the change in seasons.
- 2.3.3 Six in ten respondents (60%) 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, which is similar to previous waves.





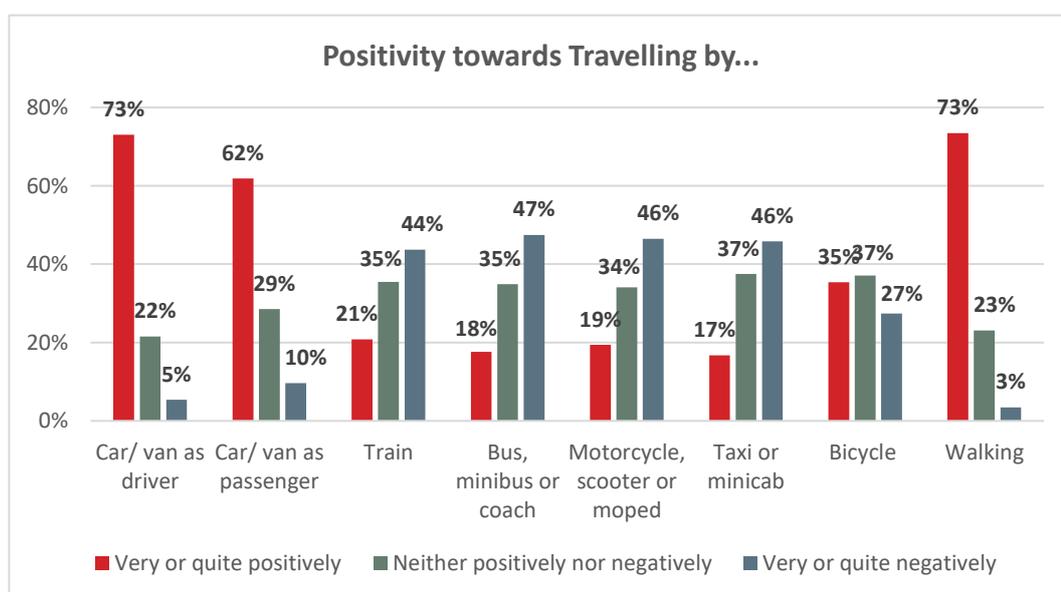
### 3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

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

3.1.1 Almost three quarters of respondents reported that they felt positively towards travelling by car or van as a driver (73%) and slightly fewer as a passenger (62%). This is a slight increase in positivity towards travelling by car from Wave 5 (65% and 59% respectively).

3.1.2 Almost three quarters (73%) felt positively towards walking, while over a third (35%) felt positively towards travelling by bicycle. This is a slight decrease from Wave 5 (78% and 41% respectively).

3.1.3 More than twice as many respondents felt negatively towards travelling by public and shared transport, than felt positively. Almost half felt negatively towards travelling by bus, minibus or coach (47%) and by taxi or minicab (46%), while slightly fewer (44%) felt negatively towards travelling by train.



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 (53%);
- Concern over catching coronavirus/other illness (50%);
- Travelling by car is easier/more convenient (49%);
- Behaviour of other passengers (41%);
- Overcrowded (36%).

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

- Travelling by car is easier/more convenient (54%);

- Concerns that social distancing may not be in place (50%);
- Concern over catching coronavirus/other illness (49%);
- Behaviour of other passengers (44%);
- Overcrowded (34%).

## 3.2 Current Safety Concerns and Measures

3.2.1 Around seven in ten respondents were very or fairly concerned about people spreading or contracting the virus whilst using:

- Public transport (72%);
- Shared transport methods, including car clubs or car sharing (71%); and
- Taxis/minicabs (69%).

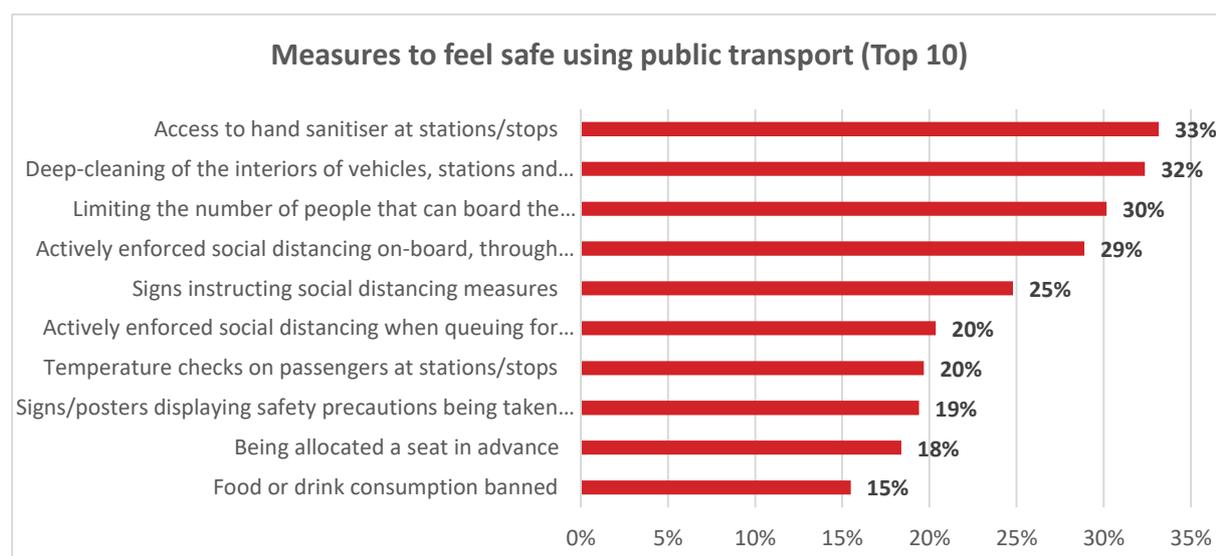
3.2.2 A similar proportion of respondents in the Nestrans region reported concern about contracting or spreading the virus while on public transport compared to respondents in the wider Scottish population (72% vs 75%).



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 (73% vs 68%).

3.2.4 Almost two thirds (62%) felt that the use of face coverings on public transport makes them feel safer. This is a slight decrease from Wave 5 (67%).

3.2.5 Around a third of respondents suggested access to hand sanitiser at stations/stops (33%), deep-cleaning of the interiors of vehicles, stations and bus stops (32%), and limiting the number of people that can board the train/tram/bus (30%) would make them feel safer when using public transport over the next month or so.



3.2.6 Over one in five respondents (22%) suggested that they already felt safe using public transport, while conversely the same amount (22%) 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 (48% and 24% respectively). Walking and cycling have also been used to replace journeys that normally would have been made another way (26% and 16% respectively).

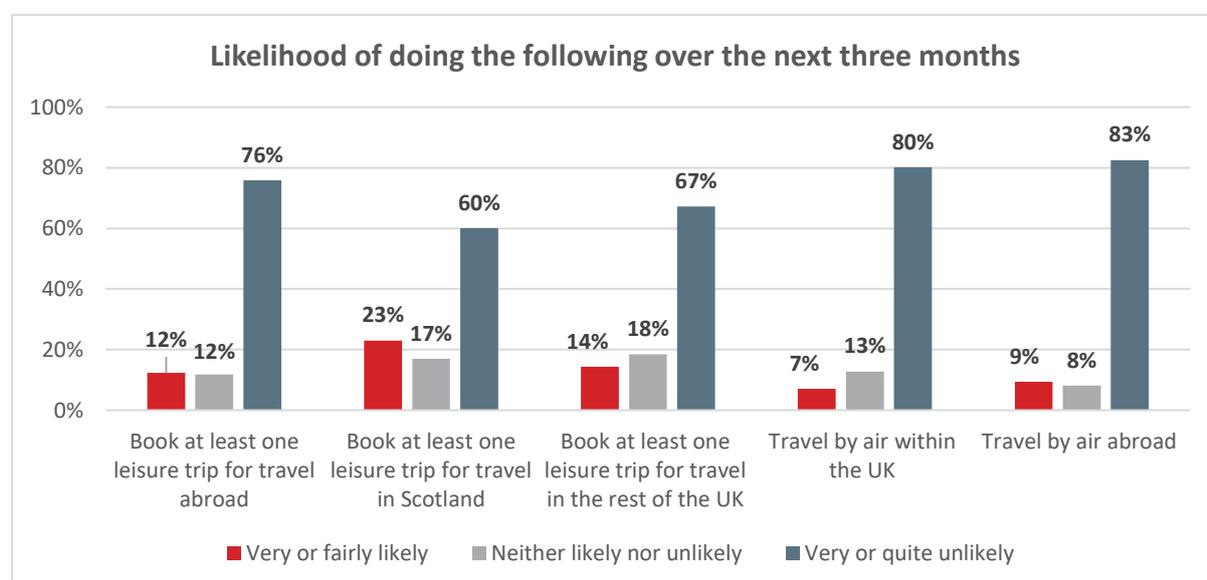
4.1.2 The majority of respondents expect that they will maintain these increased levels of walking and cycling once Covid-19 restrictions are lifted, mainly for leisure/exercise purposes (87% and 66% respectively).

### 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 (90%); to drop off their child to school (89%); shopping (81%); indoor leisure activities (77%); outdoor leisure activities (76%); visiting friends and family (72%). These findings are similar to the previous waves.

4.2.2 Around a fifth anticipated a decrease in how much they will visit friends and family (22%) and travel to indoor leisure activities (21%) in the next couple of weeks.

4.2.3 Just under a quarter (23%) thought it likely that they would book a leisure trip for travel in Scotland in the next three months, and fewer thought they would book one in the rest of the UK (14%) or abroad (12%).



## 5. COMMUTE AND BUSINESS TRIPS

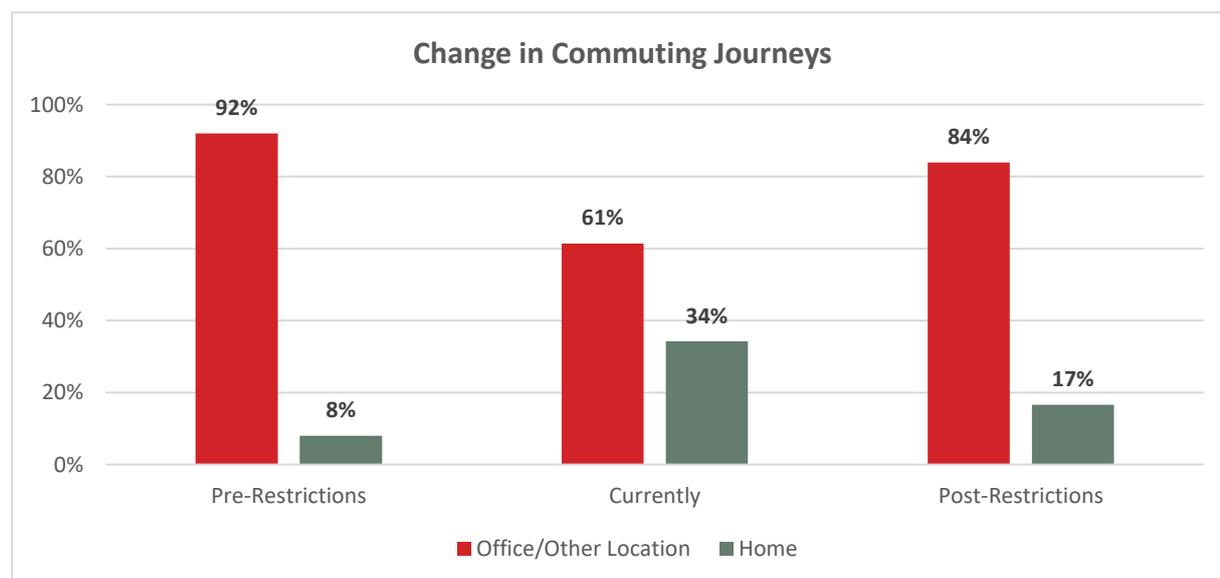
### 5.1 Commuting Trips

5.1.1 Of the 65% of respondents who reported that they were working before Covid-19 restrictions, around three-quarters (77%) were working full-time (i.e. five days a week or more) and around a quarter (23%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) 92% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 61% of their working time, while 34% are working from home and 5% are furloughed.

5.1.3 Once all restrictions are lifted, on average, respondents predict making commuting journeys on 84% of their working days. This is equivalent to an average reduction in commuting journeys of 8%, from before Covid-19 restrictions.

5.1.4 A third (33%) of respondents would like to work more flexibly, with more flexible working hours (19%); changing start/finish times (11%); and/or working the same hours over fewer days (10%). This is a decrease from Wave 5, where 44% of respondents reported wanting to work more flexibly.



### 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 or expected journey times once restrictions are lifted. The majority of journeys were reported to take between 6-30 minutes.

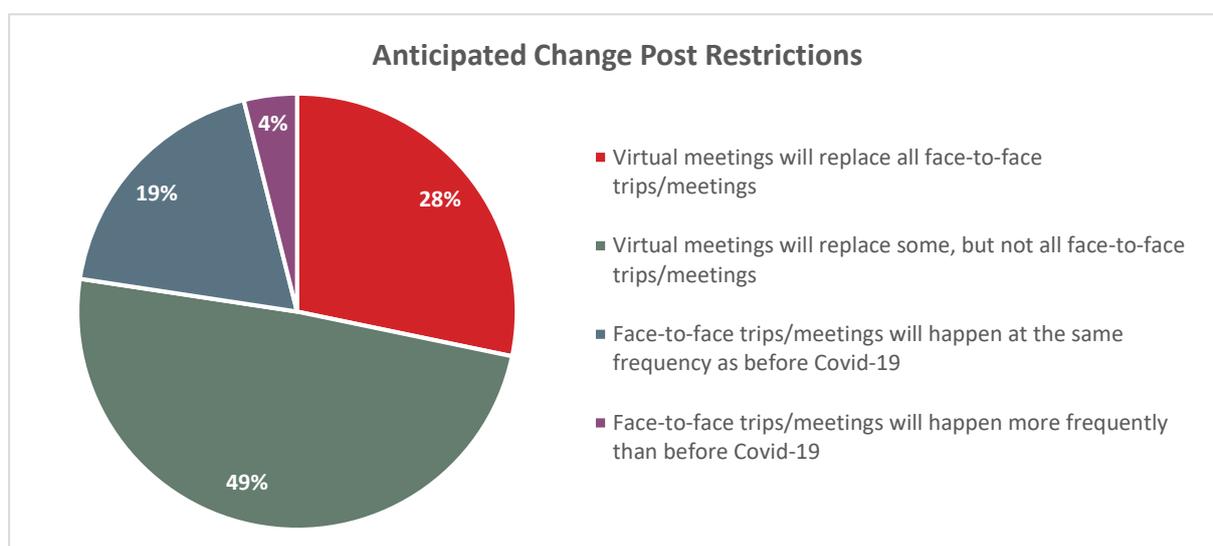
5.2.2 Respondents expect to travel to work by car or van as either a passenger or driver, or by motorbike similar amounts once restrictions are lifted (65%), as to before restrictions

were in place (65%). Respondents also anticipate using public transport, a train or a bus, a similar amount post restrictions for their commute (10%), compared to use before restrictions (12%).

## 5.3 Business Trips

5.3.1 Before Covid-19 restrictions, a third (32%) of working respondents took part in business meetings, with the majority (75%) travelling to attend between one and four business meetings in an average month.

5.3.2 Almost eight in ten respondents (79%) of working respondents who take part in business meetings expect that virtual meetings will replace some, or all, face to face business meetings.



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**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**

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

**Manchester – 16<sup>th</sup> 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

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