

# NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

## WAVE 7 REPORT (SURVEY UNDERTAKEN BETWEEN 23RD NOVEMBER AND 1ST DECEMBER 2020)



nestrans



SYSTRA

# NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

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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.

## 1.2 This Report

1.2.1 This report covers the main findings from Wave 7 of 10 Waves. The data was collected between Monday 30<sup>th</sup> November to Tuesday 1<sup>st</sup> December 2020.

1.2.2 A total of 302 respondents took part in this survey wave. The sample is about evenly split between the two council areas; 48% of respondents were from Aberdeenshire and 52% 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 Comparisons made with the Scottish population use data from Transport Scotland’s Public Attitudes survey, for which fieldwork was undertaken between 2<sup>nd</sup> and 8<sup>th</sup> December<sup>1</sup>.

1.2.5 Comparisons made to the UK population in this report are taken from Transport Focus: ‘Travel during Covid-19 survey’, fieldwork undertaken between 27<sup>th</sup> November and 29<sup>th</sup> November 2020<sup>2</sup>.

1.2.6 During the Wave 7 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 or restaurant;
- 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-11/>

<sup>2</sup> <https://www.transportfocus.org.uk/research-publications/publications/travel-during-covid-19-survey-week-31/>

<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 and all customers off the premises 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 can stay open, in line with guidance;
- 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;
- Driving lessons are permitted;
- 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, galleries, educational and heritage attractions, 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 face to face and distance learning;
- Essential travel only to/from level 3 or 4 areas in Scotland, and to/from rest of UK;
- Minimise unnecessary journeys between areas in different levels.

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>. Consequently, week commencing 16th November, work was undertaken to start the removal of the cycle lane<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.eveningexpress.co.uk/fp/news/local/work-to-remove-cycle-lanes-at-aberdeen-beach-gets-under-way/>

## 2. JOURNEYS IN THE LAST SEVEN DAYS

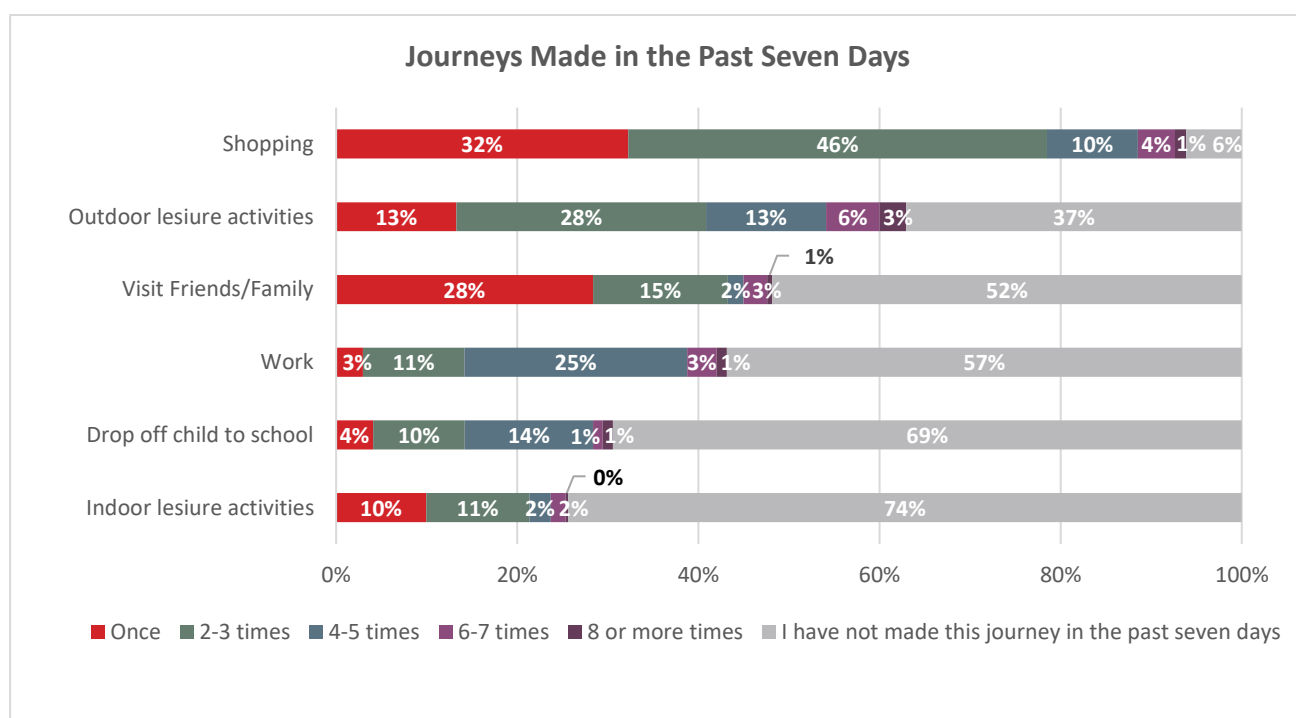
2.1.1 All respondents had made at least one journey in the last seven days, compared to around one in ten of the wider Scottish population (8%) who had not left their home in the last seven day for any reason. 

2.1.2 In the past seven days, the most frequently made trip was for shopping, with over nine in ten (94%) respondents having made this trip at least once, and over three quarters (78%) making this trip between one and three times.

2.1.3  Over three in five (63%) respondents had travelled at least once to undertake outdoor leisure activities, compared to around a quarter (26%) 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 (18%).

2.1.4  Just over two fifths (43%) had travelled to work in the last seven days, a slight decrease from Wave 6 (49%). This is, however, higher than the rest of the UK (33%) and wider Scottish population (30%). 

2.1.5 Just under a third (31%) had travelled to drop off a child to school or nursery in the last seven days, consistent with previous waves. Respondents from Aberdeen City were more likely to have made at least one trip to drop off their child to school or nursery, than respondents from Aberdeenshire (37% vs 24%).



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:

- Almost one and half times as many average trips to work;
- Almost twice as many average visits to family and friends;
- Over two and half times as many trips to indoor leisure activities.

2.1.7 Respondents predicted that they would have made similar numbers of shopping trips; outdoor leisure activities; and trips to drop off their child at school or nursery as their actual behaviour in the last seven days, if Covid-19 restrictions were not in place.

## 2.2 Ways of travelling

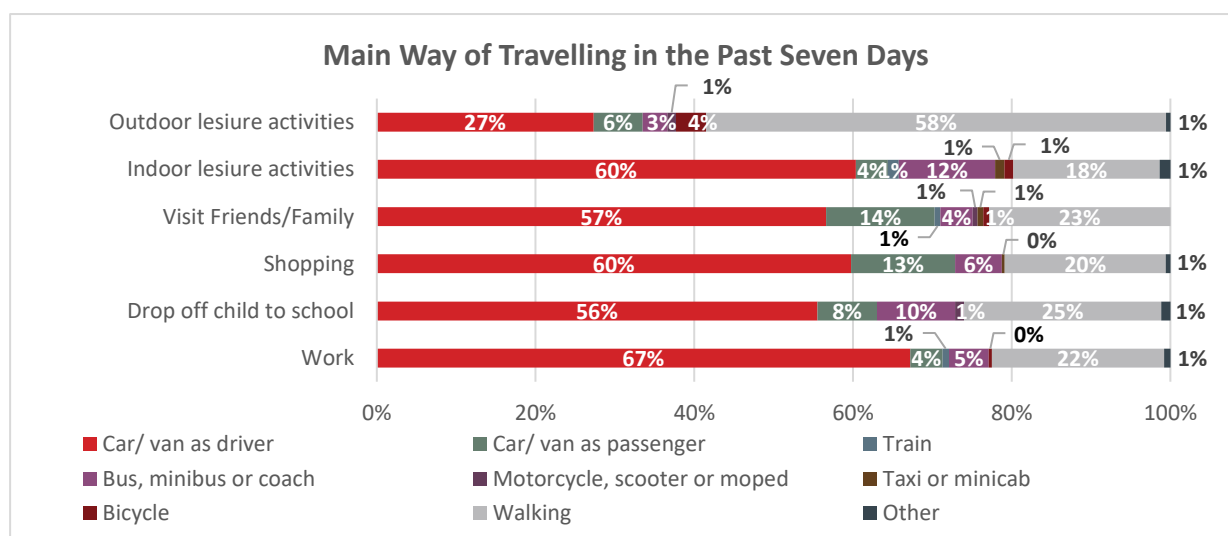
2.2.1 Similar to previous waves, travelling by car, as a driver or passenger, was the most frequently used main way of travelling for all journey types, with the exception of journeys for outdoor leisure activities, where walking (58%) was more frequently used than the car (33%).

2.2.2 Around a quarter of respondents travelled by walking as the main way to drop off their child to school (25%) and to visit friends and family (24%). Around a fifth travelled by walking as the main way of travelling to work (22%); shopping (20%); and to indoor leisure activities (18%).

2.2.3 Less than 5% travelled by bicycle as their main way of travelling for any of the specified journeys, compared to the wider Scottish population, in which less than 11% had travelled by bicycle.



2.2.4 Respondents from Aberdeenshire were more likely to walk or cycle to drop off their child to school or nursery, compared to those from Aberdeen City (33% vs 21%). Conversely, respondents from Aberdeen City were over twice as likely as respondents from Aberdeenshire to walk or cycle when undertaking shopping trips (28% vs 11%).



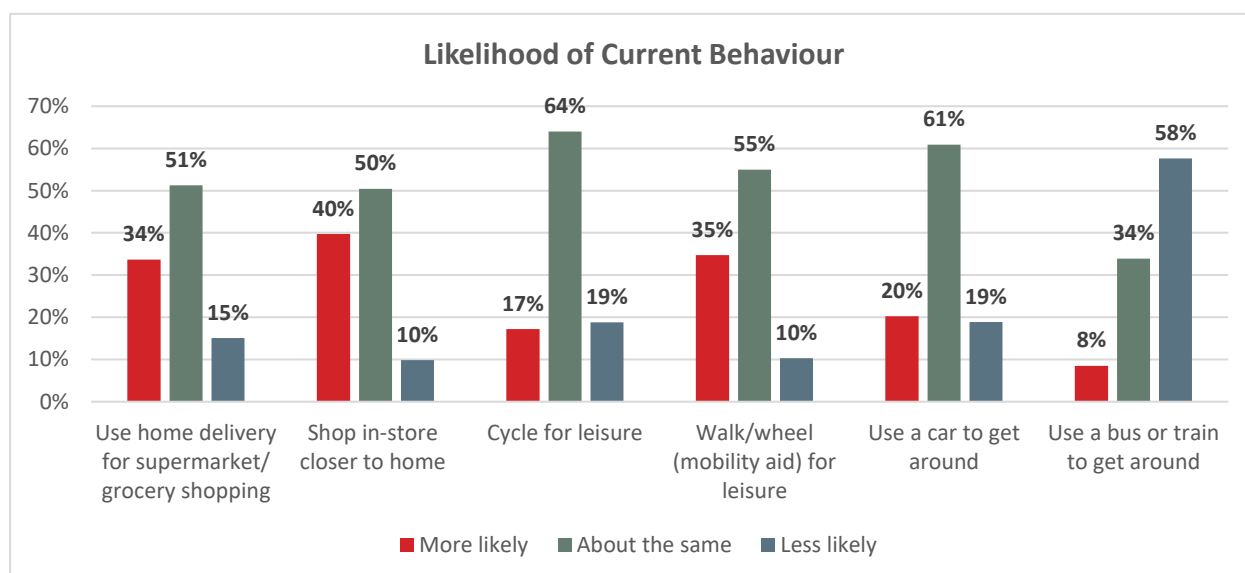
## 2.3 Changes in Current Behaviour

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. Around a third (34%) reported that they were more likely to use home delivery for supermarket shopping than before restrictions were put in place, while two fifths (40%) reported that they are more likely to shop in-store closer to home.

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 almost a fifth (17%) reporting that they were more likely to cycle for such purposes, and over a third (35%) reporting that they were more likely to walk or wheel.

2.3.3 Around six in ten 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.

2.3.4 These findings are largely similar to Wave 6 and previous waves.





### 3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

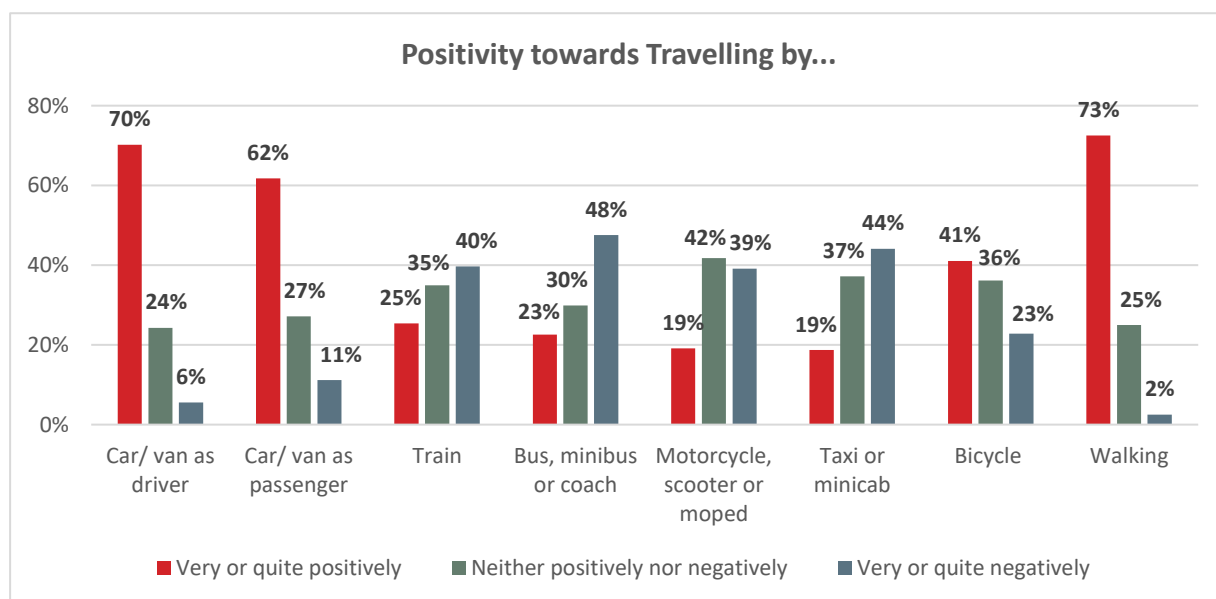
#### 3.1 Positivity and negativity towards travelling by different methods

3.1.1 Seven in ten (70%) respondents reported that they felt positively towards travelling by car or van as a driver, while around six in ten (62%) felt positively towards travelling as a passenger in a car or van. This is similar to Wave 6.

3.1.2 Almost three quarters (73%) felt positively towards walking, while around two fifths (41%) felt positively towards travelling by bicycle.

3.1.3 Around twice as many respondents felt negatively towards travelling by public and shared transport, than felt positively. Almost half (48%) felt negatively towards travelling by bus, minibus or coach, while slightly fewer felt this way towards travelling by taxi or minicab (44%) and train (40%).

3.1.4 Respondents from Aberdeen City were more likely to feel positively towards travelling by bus, minibus or coach, compared to those from Aberdeenshire (28% vs 16%). Respondents from small towns, villages or rural areas were more likely to feel positively towards travelling by car or van as a driver, compared to those from cities, large town centres or suburban areas (78% vs 64%).



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 (54%);
- Behaviour of other passengers (46%);
- Concerns that social distancing may not be in place (44%);
- Travelling by car is easier/more convenient (42%); and
- Cost/too expensive (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 (58%);
- Concerns that social distancing may not be in place (49%);
- Behaviour of other passengers (44%);
- Travelling by car is easier/more convenient (40%); and
- Overcrowded (36%).

## 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:

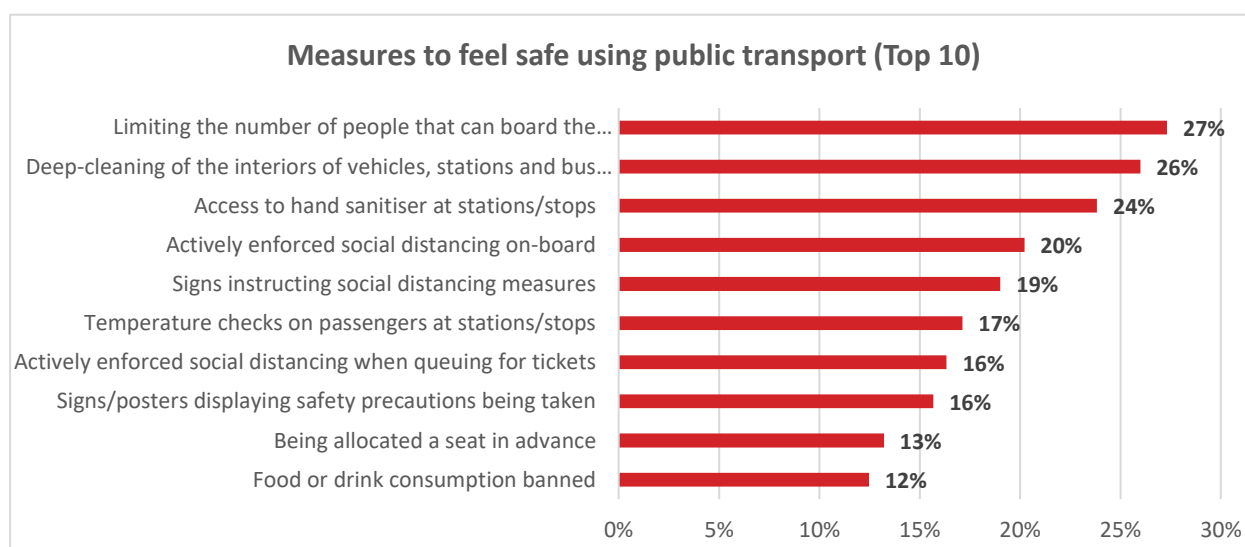
- Public transport (73%);
- Shared transport methods, including car clubs or car sharing (73%); and
- Taxis/minicabs (69%).

3.2.2 A similar proportion of the wider Scottish population (69%) reported feeling concerned about people spreading or contracting the virus whilst using public transport.



3.2.3 Almost two thirds (65%) felt that the use of face coverings on public transport makes them feel safer, similar to Wave 6 (62%).

3.2.4 Around a quarter of respondents suggested that limiting the number of people that can board the train/tram/bus (27%); deep-cleaning of the interiors of vehicles (26%) and access to hand sanitizer at stations/stops (24%) would all make them feel safer when using public transport over the next month or so.



3.2.5 While around a quarter (26%) suggested that they already felt safe using public transport, three in ten (30%) people suggested nothing would make them feel safer when using public transport in the next month or so, an increase from Wave 6 (22%).

## 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 in existing behavior has primarily been for leisure/exercise purposes (48% and 28% respectively). Walking and cycling have also been used to replace journeys that normally would have been made another way (27% and 20% 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 (89% and 85% respectively).

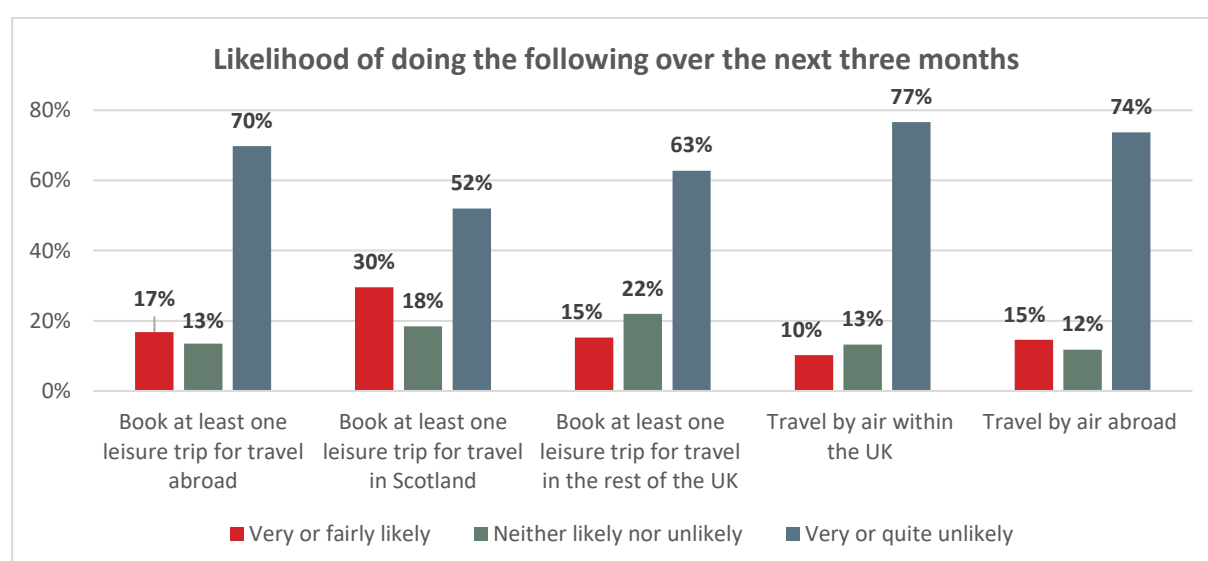
### 4.2 Travelling further afield

4.2.1 The majority of respondents did not anticipate changes to how much they will travel in the next couple of weeks: to drop off their child to school (93%); to work (92%); to go shopping (85%); for outdoor leisure activities (83%); for indoor leisure activities (81%); and to visit friends and family (80%).

4.2.2 Around one in ten anticipate an increase in how much they will go shopping (10%); visit family and friends (9%); and travel to outdoor leisure activities (9%) in the next couple of weeks or so.

4.2.3 Around one in ten anticipate a decrease in how much they will travel to indoor leisure activities (13%); and visit friends and family (11%).

4.2.4 Almost a third (30%) thought it likely that they would book a leisure trip for travel in Scotland in the next three months, a slight increase from Wave 6 (23%). Few thought that they would book a trip abroad (17%) or in the rest of the UK (15%).



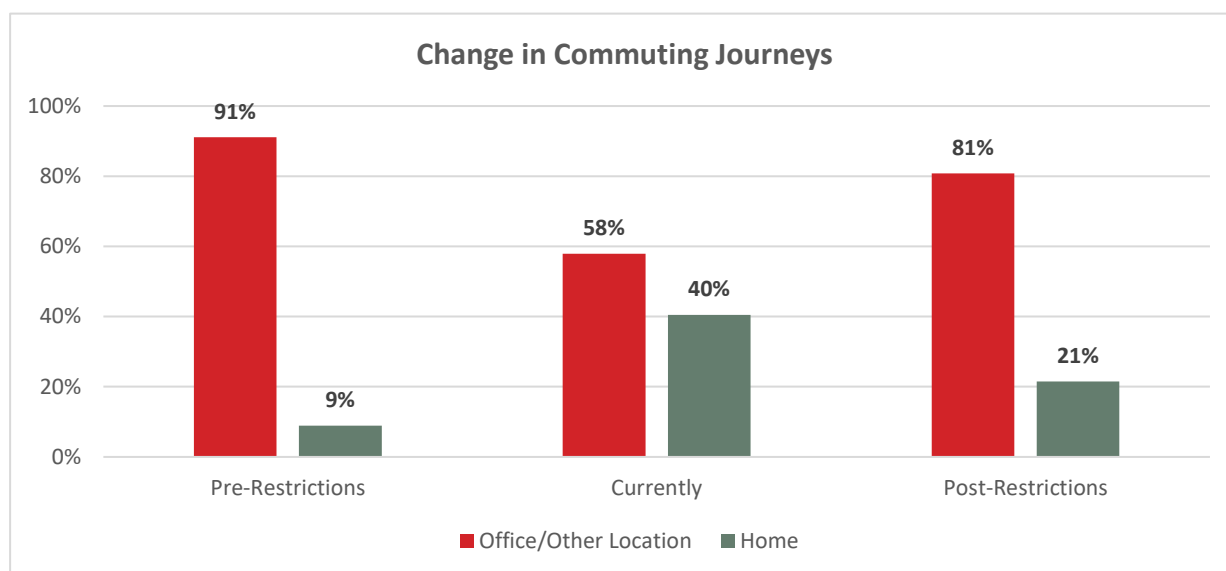
## 5. COMMUTE AND BUSINESS TRIPS

### 5.1 Commuting Trips

5.1.1 Of the 62% of respondents who reported that they were working before Covid-19 restrictions, three-quarters (75%) were working full-time (i.e. five days a week or more) and around a quarter (25%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) 91% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 58% of their working time, while 40% are working from home and 4% are furloughed.

5.1.3 Once all restrictions are lifted, on average, respondents predict making commuting journeys on 81% of their working days. This is equivalent to an average reduction in commuting journeys of 10%, from before Covid-19 restrictions.



5.1.4 Just under two fifths (39%) of respondents would like to work more flexibly, with more flexible working hours (21%); changing start/finish times (18%); and/or working the same hours over fewer days (11%). This is an increase in those who would like to work more flexibly from Wave 6 (33%).

### 5.2 Journey Time and Mode

5.2.1 Typical journey time for commutes now (for those still commuting), does not vary much from before Covid-19 restrictions, or expected journey times once restrictions are lifted. The majority of journeys were reported to take between 6-30 minutes.

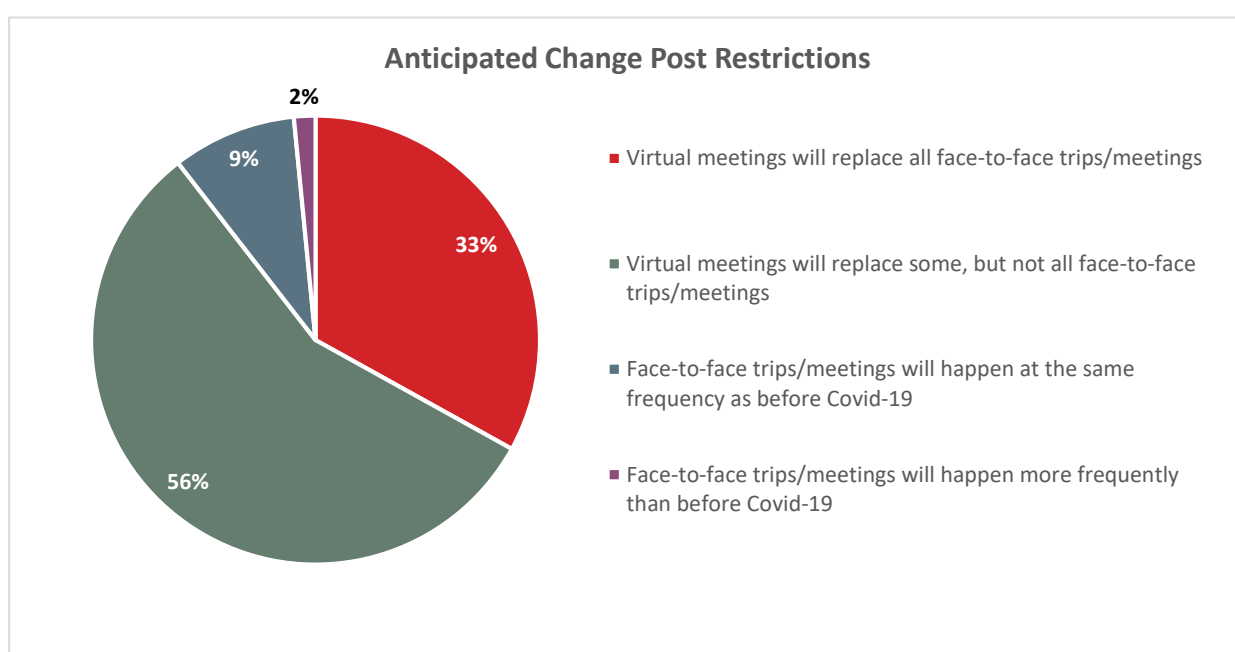
5.2.2 Respondents expect to travel to work by car or van as either a passenger or driver, or by motorbike similar amounts once restrictions are lifted (75%), as to before restrictions

were in place (72%). Respondents also anticipate using public transport, a train or a bus, a similar amount post restrictions for their commute (4%), compared to use before restrictions (8%).

## 5.3 Business Trips

5.3.1 Before Covid-19 restrictions, around a third (35%) of working respondents took part in business meetings, with the majority (65%) travelling to attend between one and four business meetings in an average month.

5.3.2 Almost nine in ten (89%) 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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The SYSTRA logo is displayed in a bold, red, sans-serif font. The letters are thick and closely spaced, with a modern, slightly rounded appearance. The 'S' and 'Y' are particularly prominent due to their size and the way they connect to the following letters.