North East Transport Behaviour and Attitude Surveys

Reference number N13/6

02/02/2021

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 8 REPORT (SURVEY UNDERTAKEN BETWEEN 14TH DECEMBER AND 23RD DECEMBER 2020)

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SYSTRA

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 8 REPORT (SURVEY UNDERTAKEN BETWEEN 14TH DECEMBER AND 23RD DECEMBER 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 overlap across the waves.

1.2 This Report

1.2.1 This report covers the main findings from Wave 8 of 10 Waves. The data was collected between Monday 14th December and Wednesday 23rd December 2020.

1.2.2 A total of 286 respondents took part in this survey wave. The sample is evenly split between the two council areas; 50% of respondents were from Aberdeenshire and 50% 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 2nd and 8th December[1].

1.2.5 Comparisons made to the UK population in this report are taken from Transport Focus: 'Travel during Covid-19 survey', in which fieldwork was undertaken between 11th and 13th December 2020[2].

1.2.6 At the beginning of the Wave 8 survey period, on Monday 14th December, both Aberdeenshire and Aberdeen City were under Protection Level 2 Covid-19 measures. On Tuesday 15th December, it was announced that both Aberdeen City and Aberdeenshire would move to protection Level 3 at 6pm on Friday 18th December.

1.2.7 The Covid-19 guidelines under Protection Level 2 included[3]:

- 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;

[1] https://www.transport.gov.scot/publication/covid-19-public-attitudes-survey-data-wave-11/
[2] https://www.transportfocus.org.uk/publication/travel-during-covid-19-survey-week-33/
[3] https://www.gov.scot/publications/coronavirus-covid-19-protection-levels/pages/protection-level-2/

- 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;
- 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;
- The maximum number of people Individuals can meet indoors and outdoors in a restaurant, café, pub or bar is six which can be from up to two separate households;
- All holiday accommodation 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;
- 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 a mix of 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.

1.2.8 The Covid-19 guidelines under Protection Level 3 included[4]:

- Individuals should not meet anyone who is not in their household indoors in their home;
- Individuals may meet another household indoors in a public place, such as in a restaurant;

[4] https://www.gov.scot/publications/coronavirus-covid-19-protection-levels/pages/protection-level-3/

- The maximum number of people who can meet indoors in a public place is six people which can be from two separate households;
- Individuals may go into another household to provide care and support for a vulnerable person;
- Restaurants, cafes, pubs and bars can open indoors and outdoors for the consumption of food and non-alcoholic drinks. Alcoholic drinks cannot be served;
- Table service and the wearing of face-coverings (unless exempt) when not seated by all customers is mandatory in all hospitality venues;
- All holiday accommodation can stay open in line with sector guidance for tourism and hospitality;
- Tourists should not travel into, or out off, a Level 3 area for holidays or visits;
- Individuals must not travel into or out of Level 3 and 4 local authority areas except for essential reasons;
- On public transport, face coverings are mandatory;
- Individuals should avoid sharing in a vehicle with people who are not members of their household or extended household as much as possible;
- Use of public transport should be for essential purposes only;
- All retailers can open providing they follow and have implemented Scottish Government guidance to ensure the safety of customers and staff;
- Mobile close contact service providers must not operate in level 3 with the exception of hairdressers and barbers;
- Stadia must be closed to spectators. No live events are permitted;
- Individuals are permitted to meet others outdoors, following the rules around meeting other households, for informal exercise or sport;
- All leisure and entertainment premises must be closed (except for use in limited circumstances);
- 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 a more restricted mix of face to face and distance learning;
- People are advised to work from home wherever that is practicable.

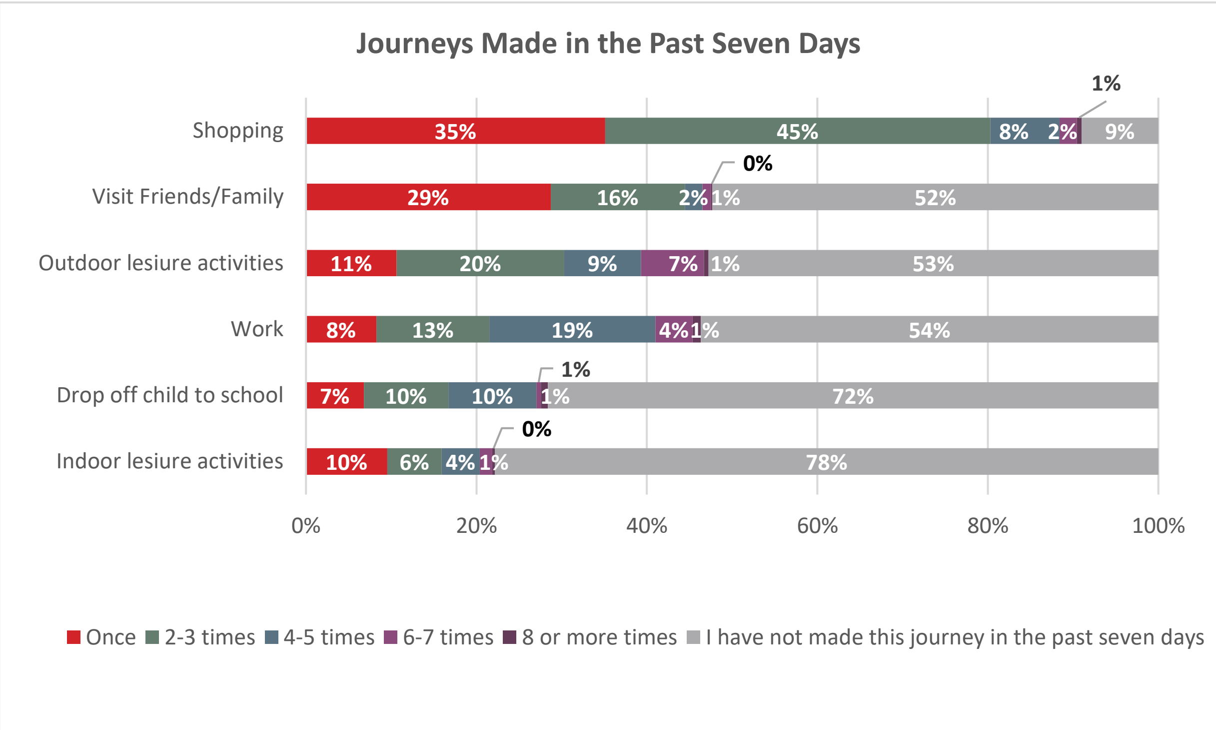
2. JOURNEYS IN THE LAST SEVEN DAYS

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

2.1.2 In the past seven days, the most frequently made trip was for shopping, with over nine in ten (91%) respondents having made this trip at least once, and four fifths (80%) making this trip between one and three times. This is slightly higher than the rest of the UK, in which 79% had made at least one shopping trip in the last seven days.

2.1.3 Just under half (48%) of respondents had reported travelling to visit friends or family at least once in the last seven days, almost twice the proportion than for the rest of the UK (25%), which may have been due to the geographical variation in Covid-19 restrictions/guidelines during the survey period. Similar numbers of respondents had traveled to outdoor leisure activities (47%), a decrease from Wave 7 (63%), while less than a quarter (22%) had travelled to indoor leisure activities.

2.1.4 Almost half (46%) of respondents had travelled to work in the last seven days, again higher than then the rest of Scotland (30%) and the UK (35%). Respondents from Aberdeen City were more likely to have travelled to work at least once in the last seven days, compared to those from Aberdeenshire (54% vs 39%).



2.1.5 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; and
- Almost three times as many average trips to indoor leisure activities.

2.1.6 Respondents predicted that they would have made similar numbers of shopping trips; outdoor leisure activities; and trips to drop off their child to school if there were not any Covid-19 travel restrictions and guidance in place.

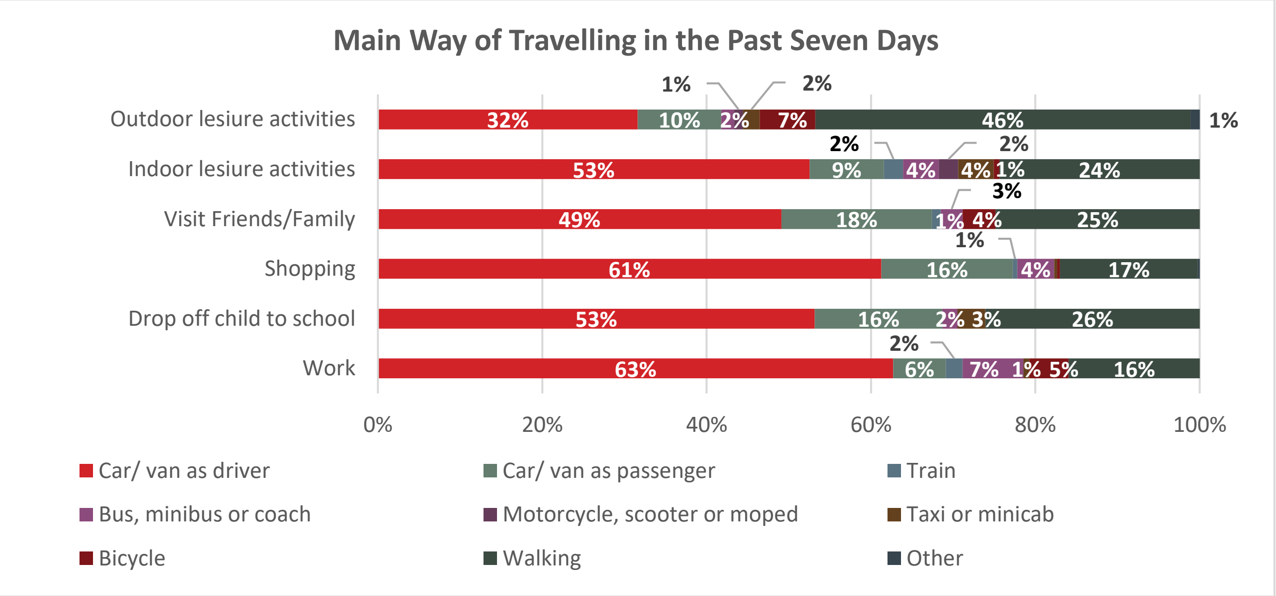
2.2 Ways of travelling

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 (46%) was slightly more frequently used than the car (42%). Car use for outdoor leisure trips increased by 9% since Wave 7 (33%), whereas walking for this purpose decreased by 12% (58%).

2.2.2 Around a quarter of respondents travelled by walking as the main way of travel to drop off their child to school (26%); to visit friends and family (25%) and to travel to indoor leisure activities (24%). Less than a fifth travelled by walking as their main way of travelling to go shopping (17%) and to work (16%).

2.2.3 Less than 7% travelled by bicycle as their main way of travelling for any of the specified journeys, while less than 11% has traveled by bicycle as their main way of travelling for any of the specified journeys.

2.2.4 Respondents from cities, large town centres or suburban areas were more likely to have travelled by walking or cycling when undertaking shopping trips, compared to those from small towns, villages or rural areas (20% vs 13%).



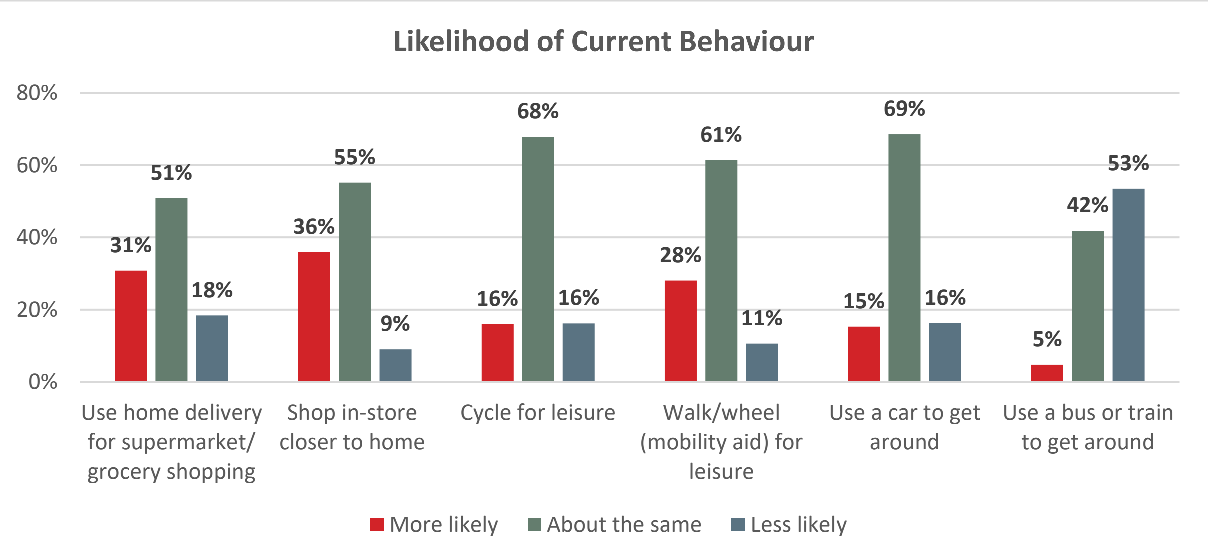
2.3 Changes in Current Behaviour

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. Just under a third (31%) reported that they were more likely to use home delivery for supermarket shopping than before restrictions were put in place, while around a third (36%) reported that they were 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 over a quarter (28%) reporting that they were more likely to walk or wheel (mobility aid) for such purposes, and almost a fifth (16%) reporting that they were more likely to cycle.

2.3.3 Respondents from cities, large town centres or suburban areas were more likely to have increased cycling for leisure activities, compared to those from small towns, villages or rural areas (23% vs 8%).

2.3.4 Over half of respondents (53%) 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.



3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

3.1 Positivity and negativity towards travelling by different methods

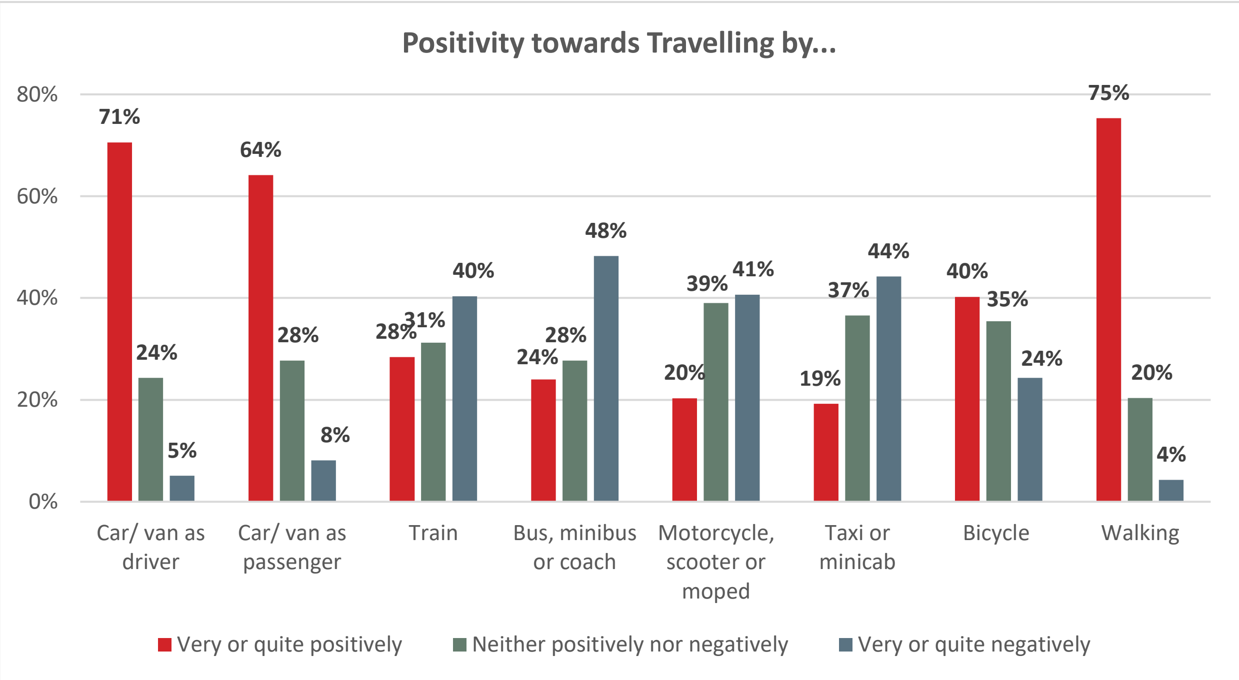
3.1.1 Around seven in ten (71%) respondents reported that they felt positively towards travelling by car or van as a driver, while over six in ten (64%) felt positively towards travelling as a passenger in a car or van.

3.1.2 Three quarters (75%) felt positively towards walking, while two fifths (40%) felt positively towards travelling by bicycle.

3.1.3 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%), train (40%) and motorcycle, moped or scooter (41%).

3.1.4 These figures are all very similar to Wave 7.

3.1.5 Public transport users, specifically those who had reported using the bus or train for any journey type, either before or since the Covid-19 guidelines, were less likely to feel negatively towards travelling by train (31% vs 45%) and bus (36% vs 55%) than those who had not reported using them.



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

- Travelling by car is easier/more convenient (48%);
- Concern over catching coronavirus/other illness (46%);

- Concerns that social distancing may not be in place (44%);
- Cost/too expensive (36%); and
- Behaviour of other passengers (34%).

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

- Travelling by car is easier/more convenient (53%);
- Concern over catching coronavirus/other illness (51%);
- Concerns that social distancing may not be in place (41%);
- Behaviour of other passengers (35%); and
- Overcrowded (28%).

3.2 Current Safety Concerns and Measures

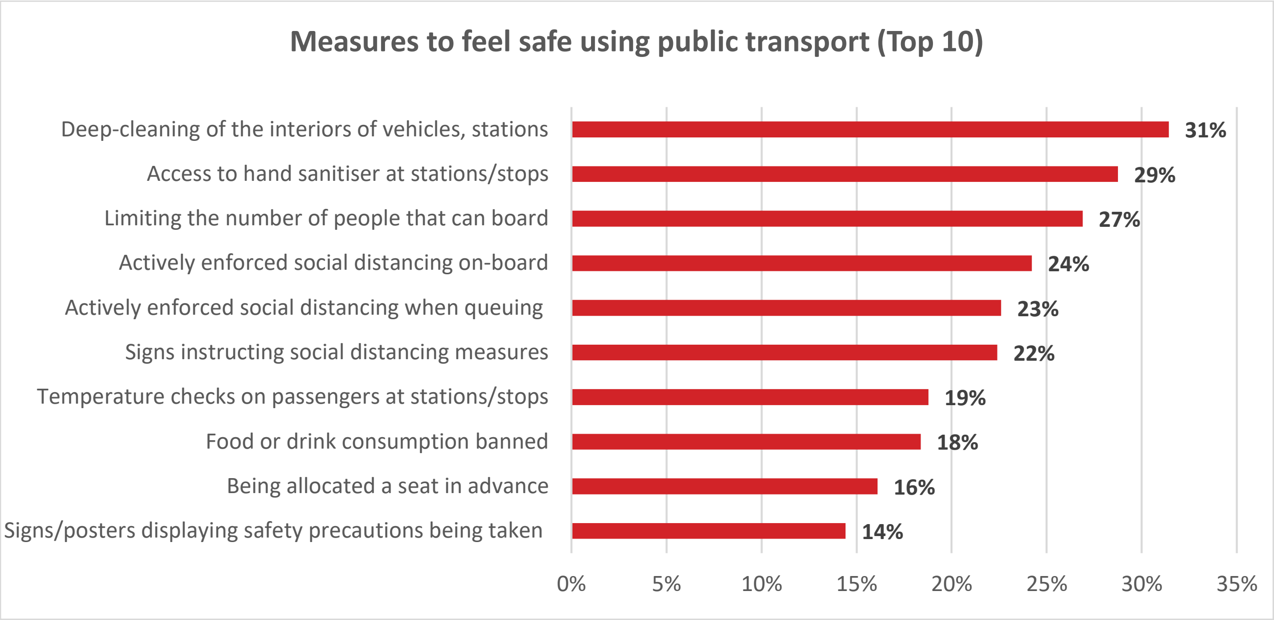
3.2.1 Around seven in ten respondents were very or fairly concerned about people spreading or contracting the virus whilst using:

- Public transport (74%);
- Shared transport methods, including car clubs or car sharing (73%); and
- Taxis/minicabs (70%).

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 Around two thirds (67%) felt that the use of face coverings on public transport makes them feel safer, similar to Wave 7 (65%). Respondents from cities, large town centers or suburban areas were more likely to have felt that the use of face coverings on public transport makes them feel safer, compared to those from small towns, villages or rural areas (73% vs 60%).

3.2.4 Around a third of respondents suggested that deep-cleaning of the interiors of vehicles, stations and bus stops (31%) and access to hand sanitiser at stations/stops (29%) would make them feel safer when using public transport over the next month or so. Around a quarter suggested that limiting the number of people that can board the train/tram/bus (27%) and actively enforced social distancing on-board, through staff presence and CCTV (24%) would make them feel safer.



3.2.5 Just under a quarter (23%) of respondents suggested that they already felt safe using public transport, while over a quarter (26%) suggested nothing would make them feel safer when using public transport in 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 an increase in their walking and cycling levels. The increase has primarily been for leisure/exercise purposes (38% and 23% respectively). Walking and cycling have also been used to replace journeys that normally would have been made another way (20% and 15% respectively). This is a general decrease (for walking and cycling, and for leisure/exercise and to replace journeys by other modes) from Wave 7.

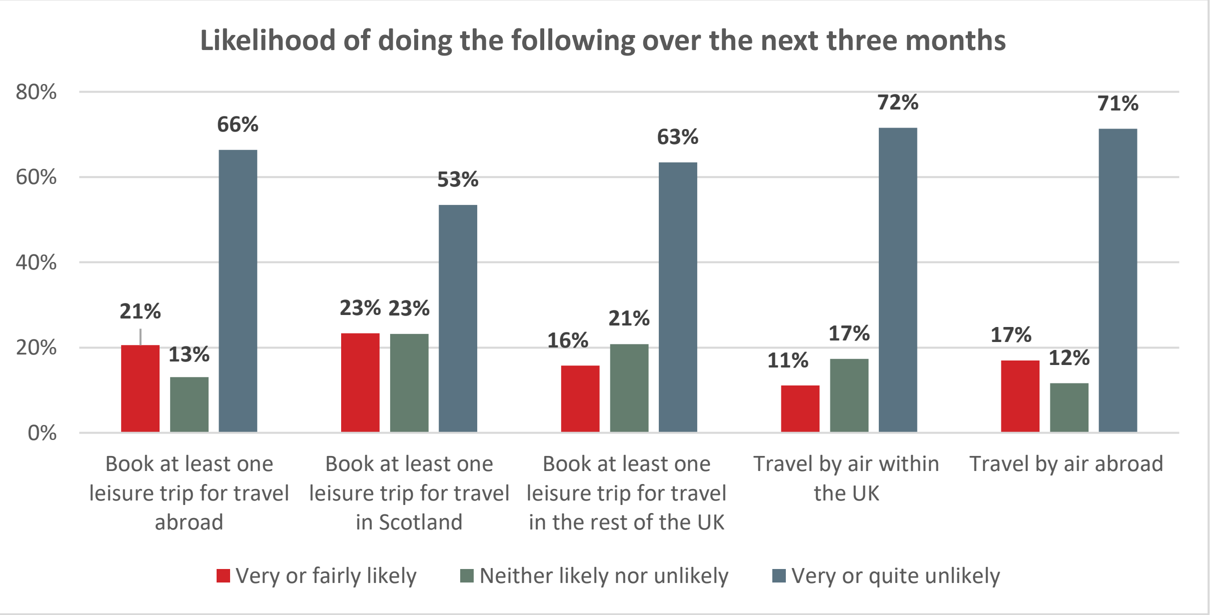
4.1.2 The majority of respondents expect that they will maintain these increased levels once Covid-19 restrictions are lifted, mainly walking for leisure/exercise purposes (83%).

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 work (88%); to drop off their child to school (87%); for outdoor leisure activities (81%); for indoor leisure activities (80%); to go shopping (77%); or to visit friends and family (75%).

4.2.2 Slightly fewer people anticipate no change to how much they will travel (all journey purposes) in the next couple of weeks compared to Wave 7. Around one in ten anticipate an increase in how much they will go shopping (13%); visit family and friends (12%); and travel to outdoor leisure activities (10%) in the next couple of weeks or so.

4.2.3 Less than a quarter (23%) thought it likely that they would book a leisure trip for travel in Scotland in the next three months. Few thought that they would book a trip abroad (21%) or in the rest of the UK (16%).



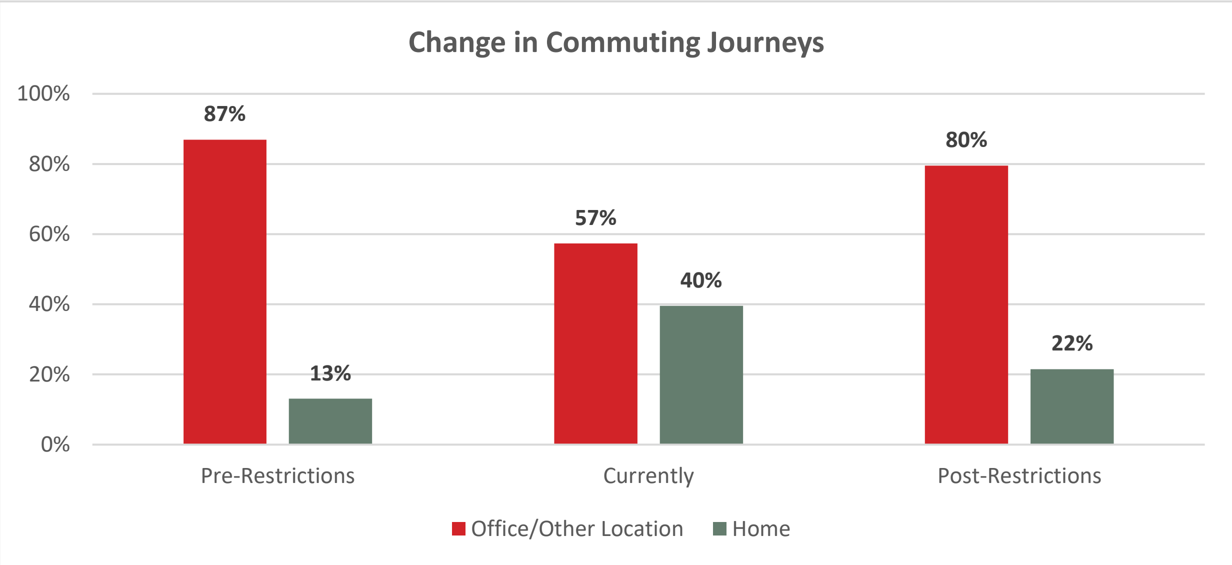
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting Trips

5.1.1 Of the 64% of respondents who reported that they were working before Covid-19 restrictions, four fifths (80%) were working full-time (i.e. five days a week or more) and two fifths (20%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) on 87% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 57% 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 80% of their working days. This is equivalent to an average reduction in commuting journeys of 7%, from before Covid-19 restrictions.



5.1.4 Just over a third (35%) of respondents would like to work more flexibly, with more flexible working hours (18%); changing start/finish times (12%); and/or working the same hours over fewer days (11%). This is a slight decrease in those who would like to work more flexibly from Wave 7 (39%).

5.2 Journey Time and Mode

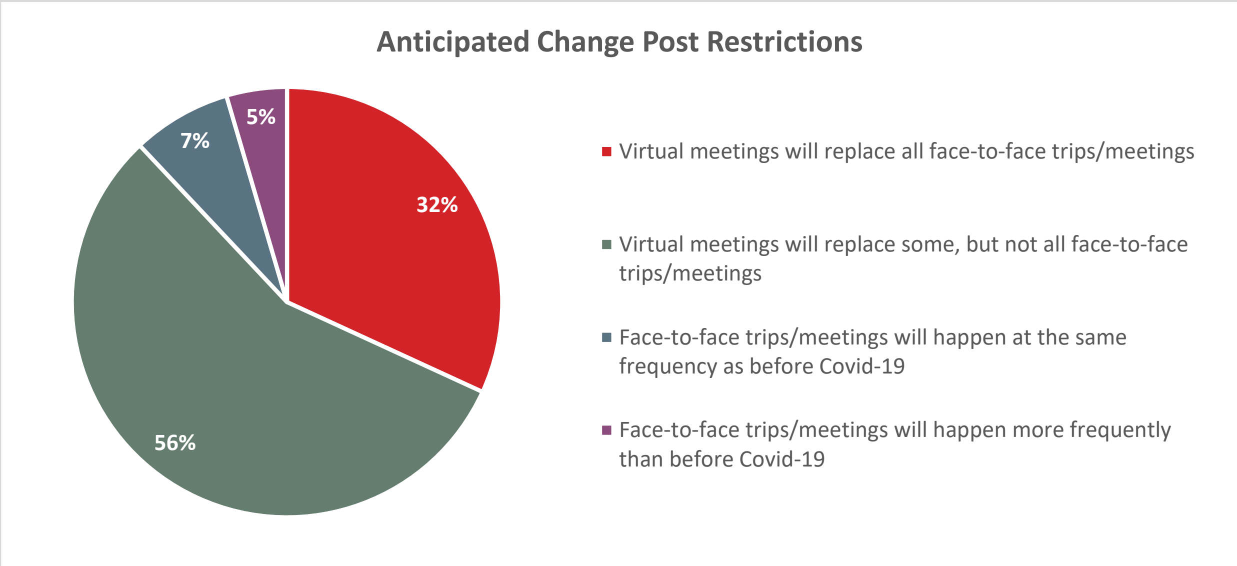
5.2.1 Typical journey times for commutes now (for those still commuting), does not vary much from journey times before Covid-19 restrictions, or expected journey times once restrictions are lifted. The majority of journeys were reported to take between 6-30 minutes.

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 (73%), as 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 (7%), compared to before restrictions were in place (8%).

5.3 Business Trips

5.3.1 Before Covid-19 restrictions, around a third (36%) of working respondents took part in business meetings, with the majority (73%) travelling to attend between one and four business meetings in an average month.

5.3.2 Almost nine in ten (88%) 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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