

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 9 REPORT (SURVEY UNDERTAKEN BETWEEN 18TH JANUARY AND 25TH JANUARY 2021)



nestrans



SYSTRA

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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, between July 2020 and 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 9 of 10 Waves. The data was collected between Monday 18th January and Monday 25th January 2021.

1.2.2 A total of 311 respondents took part in this survey wave. The data used in this report has been weighted to ensure the sample is representative of the Nestrans region by age and gender. The sample is about evenly split between the two council areas; 49% of respondents were from Aberdeenshire and 51% were from Aberdeen City.

1.2.3 Comparisons made with the Scottish population use data from Transport Scotland’s Public Attitudes survey, for which fieldwork was undertaken between 13th and 19th January 2021¹.

1.2.4 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 22nd and 24th January 2021².

1.2.5 On the 5th January 2021, following a continued increase in Covid-19 cases, Stay at Home Protection level guidance came into effect for the majority of Scotland, including Aberdeenshire and Aberdeen City, and was in place for the entirety of survey period³.

1.2.6 The Covid-19 guidelines for the Stay at Home protection level during this survey period included⁴:

- Individuals were told to stay at home as much as possible to minimise the risk of spreading Covid-19;
- By law, individuals in a level 4 area could only leave their home for essential purposes;

¹ <https://www.transport.gov.scot/publication/covid-19-public-attitudes-survey-data-wave-12/>

² <https://www.transportfocus.org.uk/publication/week-35-travel-during-covid-19-survey/>

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

⁴ <https://www.gov.scot/publications/coronavirus-covid-19-stay-at-home-guidance/>

- Individuals were encouraged to shop online or use local shops and services where possible, and to avoid all unnecessary travel;
- Non-essential click and collect retail services were prohibited;
- Working from home was the default position for businesses and services;
- Businesses providing takeaway food also had to operate on a 'non-entry' basis only;
- Restrictions banned the consumption of alcohol in public places;
- Essential reasons for leaving homes included:
 - For work/employment, or to provide voluntary or charitable services, where it cannot be done from home;
 - For education including, school, college, university;
 - For essential shopping, including essential shopping for a vulnerable person;
 - To obtain or deposit money, where it is not possible to do so from home;
 - For healthcare;
 - For childcare or support services for parents or expectant parents;
 - For essential services, including services of a charitable or voluntary nature such as food banks, alcohol or drug support services;
 - To access public services where it is not possible to do so from home;
 - To provide care, assistance, support to or respite for a vulnerable person;
 - To provide or receive emergency assistance;
 - To meet a legal obligations;
 - For essential animal welfare reasons;
 - Local outdoor recreation, sport or exercise, walking, cycling, golf, or running that starts and finishes at the same place (which can be up to 5 miles from the boundary of an individual's local authority area) as long as the individual can abide by the rules on meeting other households;
 - To attend a marriage ceremony or registration of a civil partnership
 - To attend a funeral or for compassionate reasons which relate to the end of a person's life;
 - Whilst it was permitted to leave the house for activities in connection with moving home (including viewing a property), or for activities in connection with the essential maintenance, purchase, sale, letting, or rental of residential property that the person owns or is otherwise responsible for, it was advisable at the time to postpone, if possible;
 - To avoid injury, illness or to escape a risk of harm;
 - For those involved in professional sports, for training, coaching or competing in an event;
 - To visit a person receiving treatment in a hospital, staying in a hospice or care home, or to accompany a person to a medical appointment; and
 - To register or vote in a Scottish or UK Parliament, Local Government or overseas election or by-election, including on behalf of someone else by proxy.

1.2.7 During the survey period, Aberdeen City and Aberdeenshire experienced very cold weather, with snow and ice in some areas⁵.

⁵ <https://www.pressandjournal.co.uk/fp/news/aberdeen/2795167/freezing-weather-to-continue-with-snow-expected-as-temperatures-plunge-as-low-as-15c/>

2. JOURNEYS IN THE LAST SEVEN DAYS

2.1.1 All respondents (100%) had made at least one journey in the last seven days, higher than the wider Scottish population, in which around nine out of ten (89%) had left their home in the last seven days.



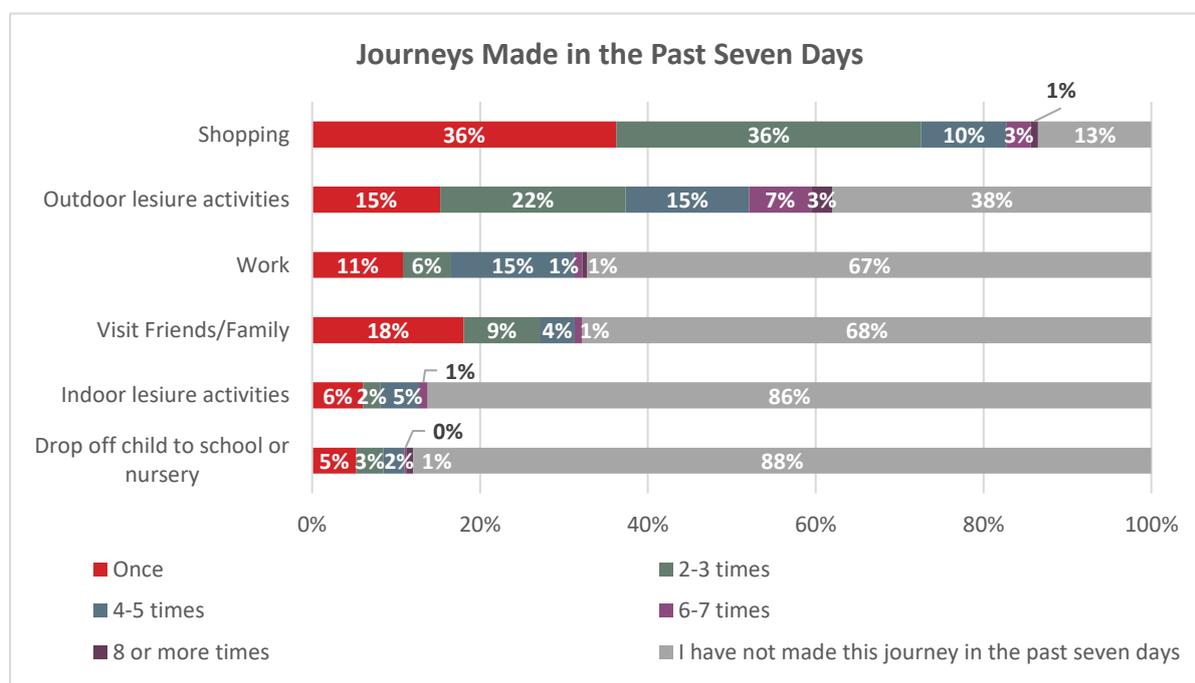
2.1.2 In the past seven days, the most frequently made trip was for shopping, with (87%) respondents having made this trip at least once, and (73%) making this trip between one and three times. This is similar to the rest of the Wider Scottish population, in which 83% had made at least one shopping trip for groceries in the last seven days. Respondents from Aberdeen City were more likely to have made at least one shopping trip in the last seven days compared to those from Aberdeenshire (92% vs 81%).



2.1.3 Almost a third (32%) of respondents had reported travelling to visit friends or family at least once in the last seven days, a decrease from Wave 8 (48%) but still higher than the rest of the UK (12%). Similar numbers of respondents had traveled to outdoor leisure activities (62%), an increase from Wave 8 (47%), while less than a sixth (14%) had travelled to indoor leisure activities.



2.1.4 A third (33%) of respondents had travelled to work in the last seven days. This is a decrease from Wave 8 (46%), and lower than the rest of the UK (34%), but still higher than the wider Scottish population (23%). Just over one in ten (12%) dropped off their child to school or nursery in the last seven days.



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 twice as many average journeys to work;
- Almost two and half times as many average journeys to drop off their child to school or nursery;
- Almost three times as many average visits to family and friends; and
- Five times as many average trips to indoor leisure activities.

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

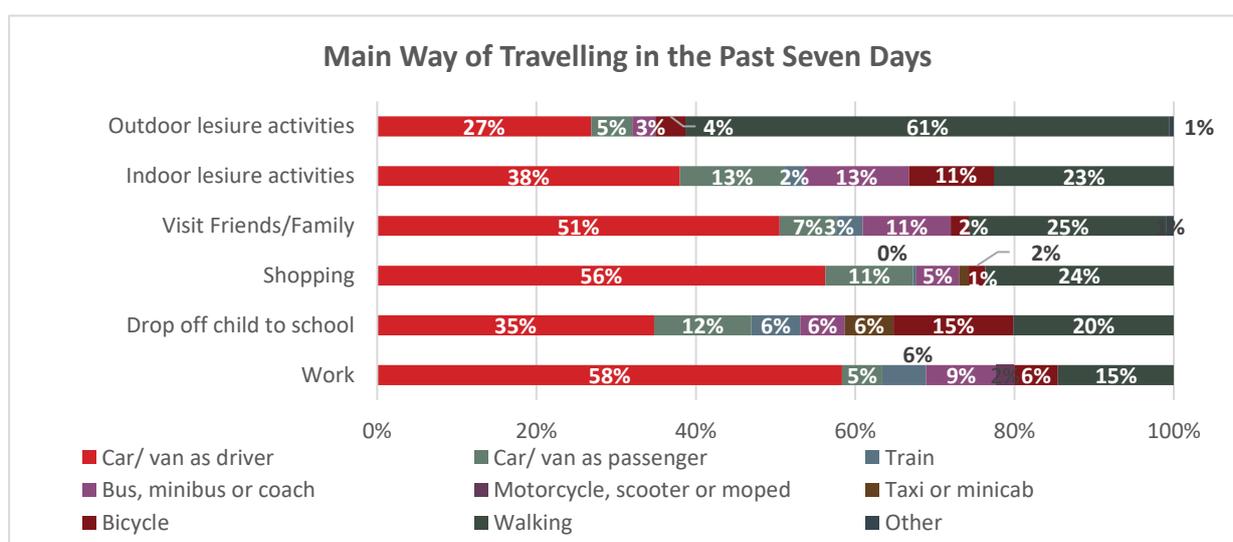
2.2 Ways of travelling

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 (61%) was almost twice as frequently used as the car (32%).

2.2.2 Around a quarter of respondents travelled by walking as their main way of travelling to visit friends and family (25%); go shopping (24%); and to indoor leisure activities (23%). A fifth or less walked to drop off their child to school or nursery (20%) and to travel to work (15%).

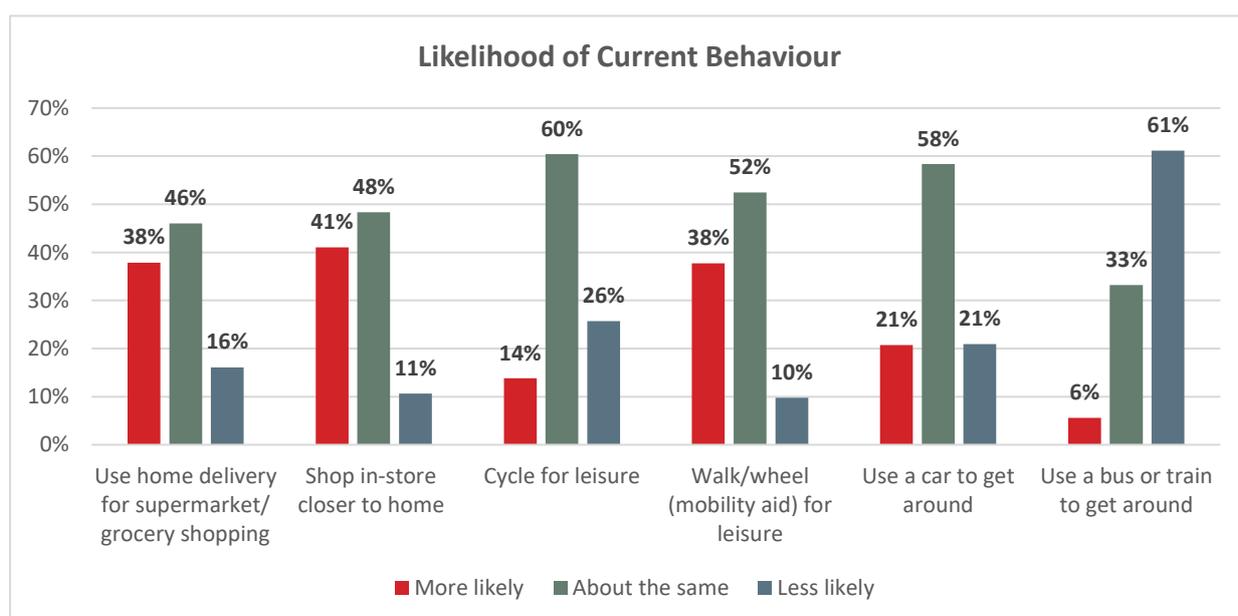
2.2.3 Respondents from cities, large town centres or suburbs were more likely to have made the journey to go shopping by bicycle and walking than those from small towns, villages or rural areas (32% vs 17%).

2.2.4 15% travelled by bicycle as their main way of travelling to drop off their child to school or nursery, while one in ten (11%) travelled to indoor leisure activities by bicycle. Fewer respondents travelled by bicycle as their main way of travelling for the other journey purposes (between 2% and 6%). This is similar to the wider Scottish population, in which less than 4% had travelled by bicycle as their main way of travelling for any other specified journey types.



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 over a third (38%) reported that they were more likely to use home delivery for supermarket shopping than before restrictions were put in place, while over two fifths (41%) reported that they were more likely to shop in-store closer to home. This is a slight increase from Wave 8.
- 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 third (38%) reporting that they were more likely to walk or wheel (mobility aid) for such purposes, and over one in ten (14%) reporting that they were more likely to cycle.
- 2.3.3 Respondents from Aberdeen City were more likely than those from Aberdeenshire to have reported an increase in cycling for leisure purposes since Covid-19 restrictions (17% vs 10%).
- 2.3.4 Over six in ten respondents (61%) 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

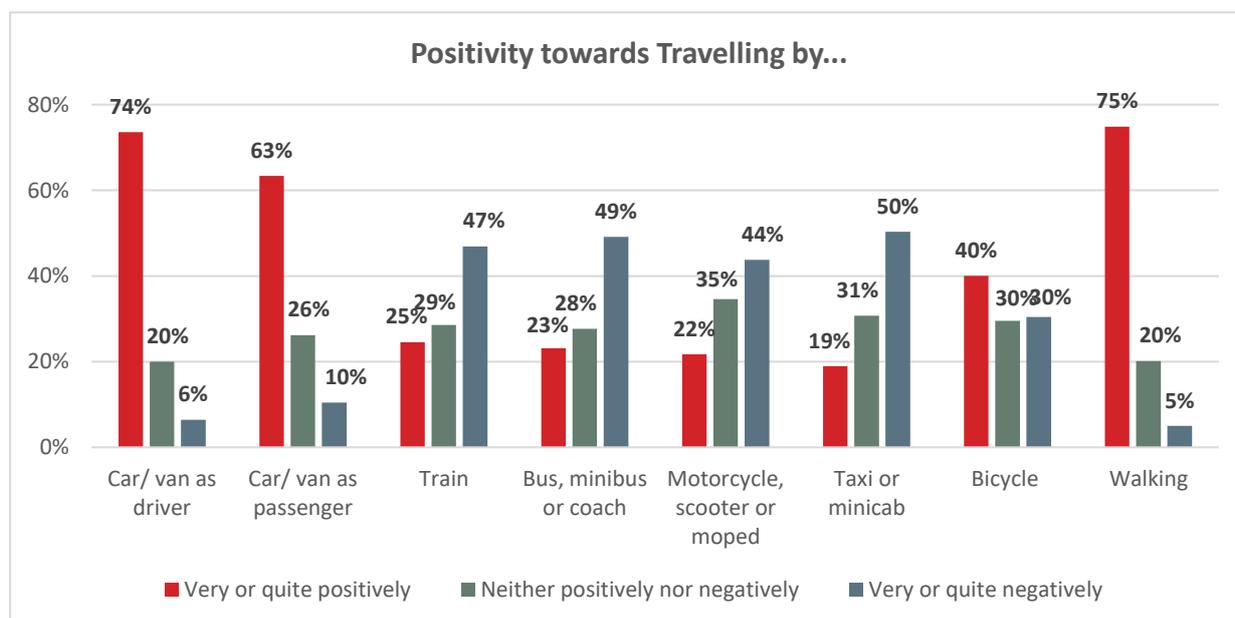
3.1 Positivity and negativity towards travelling by different methods

3.1.1 Just under three quarters (74%) of respondents reported that they felt positively towards travelling by car or van as a driver, while over six in ten (63%) 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, identical to Wave 8. Respondents from Aberdeen City were more likely to feel positively towards travelling by bike compared to those from Aberdeenshire (46% vs 34%).

3.1.3 Half (50%) felt negatively towards travelling by taxi or minicab, while slightly fewer felt this way towards travelling by bus, minibus or coach (49%) and train (47%). Over four in ten felt negatively towards travelling by motorcycle (44%).

3.1.4 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 (39% vs 52%) and bus (37% vs 57%) than those who had not reported using them.



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 (56%);
- Concerns that social distancing may not be in place (45%);
- Travelling by car is easier/more convenient (40%);
- Behaviour of other passengers (37%); and

- Cost/too expensive (37%).

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 (54%);
- Travelling by car is easier/more convenient (52%);
- Concerns that social distancing may not be in place (40%);
- Behaviour of other passengers (38%); and
- Frequency of service (28%).

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:

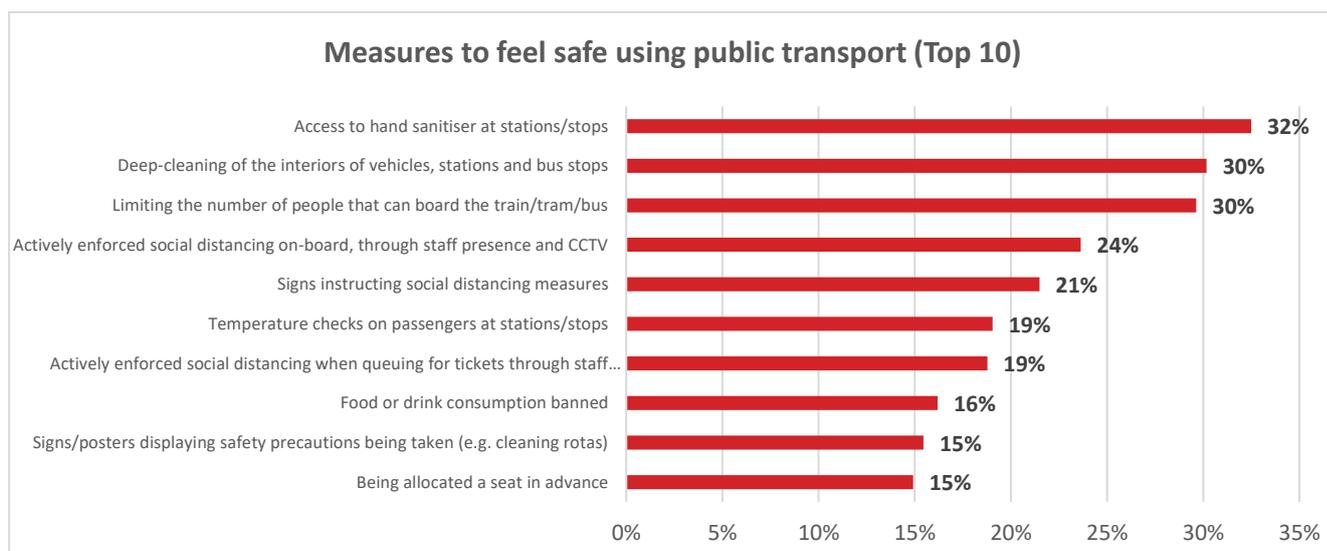
- Public transport (76%);
- Shared transport methods, including car clubs or car sharing (75%); and
- Taxis/minicabs (75%).

3.2.2  Levels of concern is slightly higher compared to Wave 8, and similar to the wider Scottish population's concerns about public transport (77%). Respondents from cities or large town centers or suburban areas were more likely to report feeling concerned about spreading or contracting the virus whilst using public transport compared to those from small towns, villages and rural areas (81% vs 69%).

3.2.3 Around seven in ten (69%) suggested that the use of face coverings makes them feel safer when using public transport.

3.2.4 All respondents were asked what could done to make them feel safer when using public transport. The most common measures were:

- Access to hand sanitiser at stations/stops (32%);
- Deep-cleaning of the interiors of vehicles, stations and bus stops (30%);
- Limiting the number of people that can board the train/tram/bus (30%);
- Actively enforced social distancing on-board, through staff presence and CCTV (24%); and
- Signs instructing social distancing measures (21%).



3.2.5 Around a fifth (21%) of respondents suggested that they already felt safe using public transport, while over a quarter (27%) suggested that nothing would make them feel safer 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 existing walking and cycling levels. The increase has primarily been for leisure/exercise purposes (51% and 22% respectively). Walking and cycling have also been used to replace journeys that normally would have been made another way (31% and 18% respectively).

4.1.2 This is an increase from Wave 8, specifically in walking for leisure purposes (51% vs 38%) and for walking to replace another way of travelling (31% vs 20%).

4.1.3 The majority of respondents expect that they will maintain these increased levels once Covid-19 restrictions are lifted, mainly for walking for leisure/exercise purposes (75%).

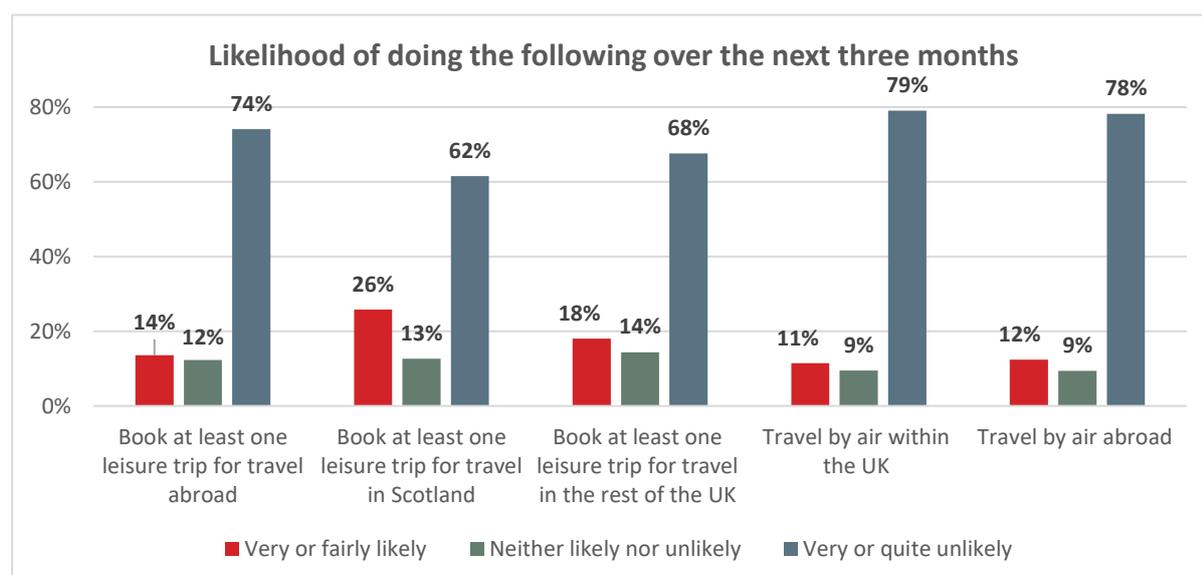
4.2 Travelling further afield and future travel

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 or nursery (88%); to work (87%); to go shopping (79%); to indoor leisure activities (72%); to outdoor leisure activities (71%); or to visit family and friends (68%).

4.2.2 Almost a fifth (17%) anticipate an increase in travel to outdoor leisure activities.

4.2.3 Just under a quarter anticipate an decrease in visiting friends and family (23%) and travel to indoor leisure activities (23%) in the next week or so.

4.2.4 Just over a quarter (26%) 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 (14%) or in the rest of the UK (18%).



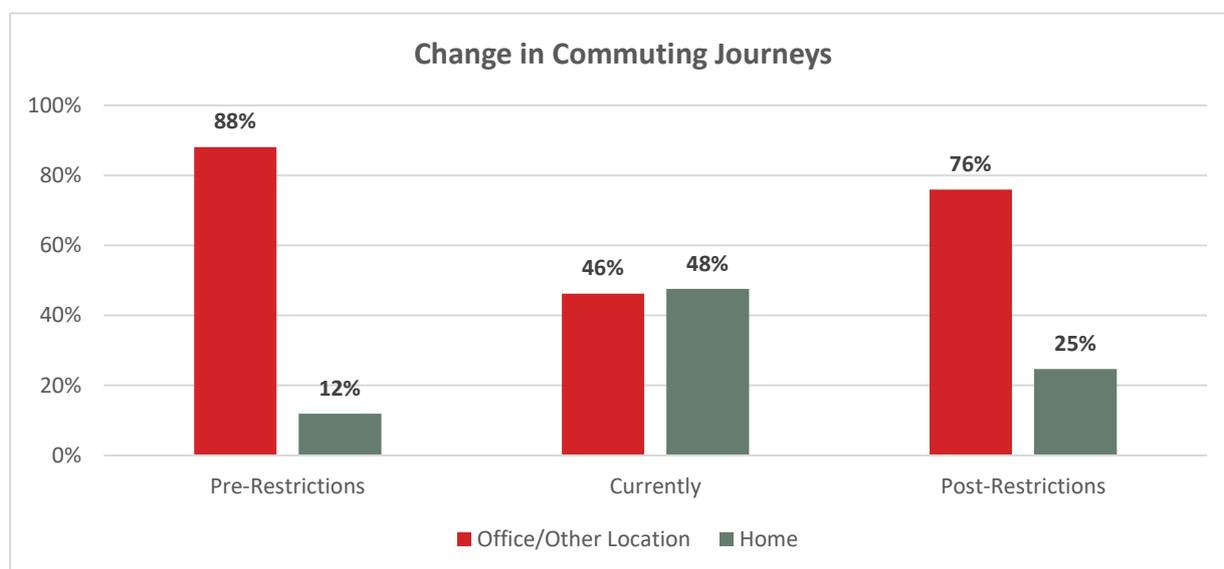
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting Trips

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

5.1.2 Respondents were making commuting journeys (i.e. not working from home) on 88% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 46% commuting of their working time, while 48% are working from home and 7% are furloughed.

5.1.3 Once all restrictions are lifted, on average, respondents predict making commuting journeys on 76% of their working days. This is equivalent to an average reduction in commuting journeys of 12%, from before Covid-19 restrictions.



5.1.4 Four in ten (40%) of respondents would like to work more flexibly, with more flexible working hours (17%); changing start/finish times (18%); and/or working the same hours over fewer days (11%). This is a slight increase in those who would like to work more flexibly from Wave 8 (35%).

5.2 Journey Time and Mode

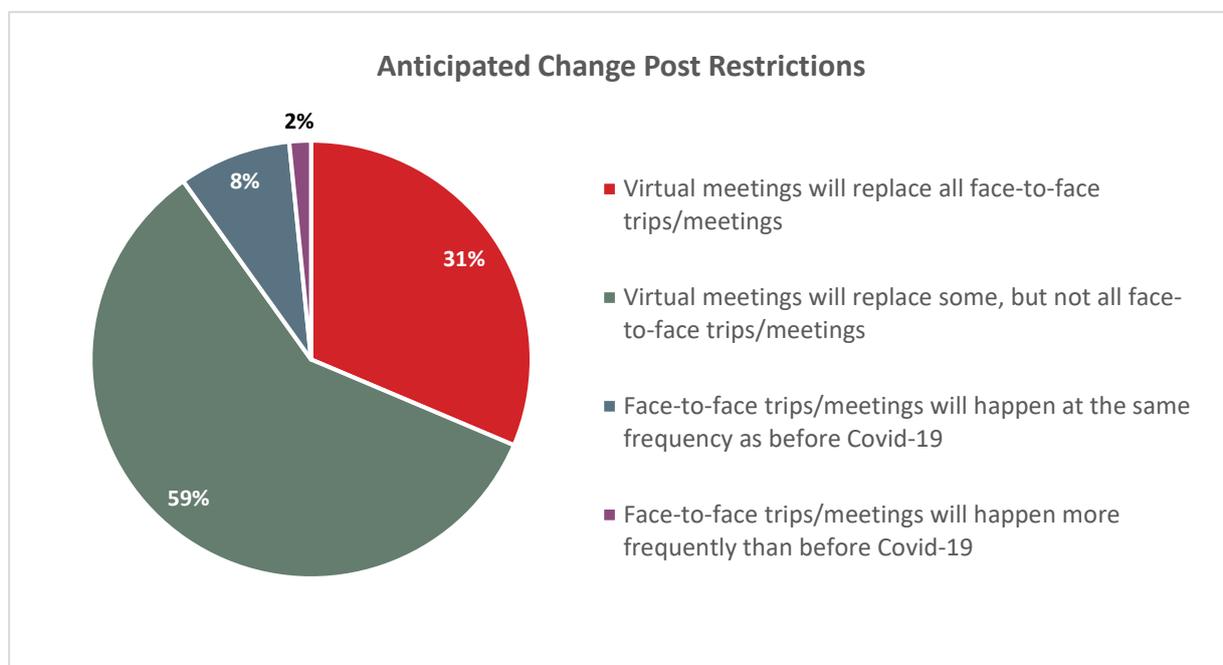
5.2.1 Typical journey times for commutes now (for those still commuting), does not vary much from journey times before Covid-19 restrictions, or expected journey times once restrictions are lifted. The majority of journeys were reported to take between 6-30 minutes.

5.2.2 Respondents expect to travel to work by car or van as either a passenger or driver, or by motorbike, slightly more once restrictions are lifted (73%), as to before restrictions were in place (65%). Similarly, respondents anticipate using public transport, a train or a bus, slightly less post restrictions for their commute (10%), compared to before restrictions were in place (15%).

5.3 Business Trips

5.3.1 Before Covid-19 restrictions, around a third (37%) of working respondents took part in business meetings, with the majority (78%) travelling to attend between one and four business meetings in an average month.

5.3.2 Nine in ten (90%) of working respondents who take part in business meetings expect that virtual meetings will replace some, or all, face to face business meetings.



SYSTRA provides research and advice on transport, to central, regional and local government, agencies, developers, operators and financiers.

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The SYSTRA logo is rendered in a bold, red, sans-serif typeface. The letters are thick and closely spaced, with a distinctive design where the 'S' and 'Y' have a slightly irregular, hand-drawn quality. The 'A' is also bold and blocky. The overall appearance is clean, modern, and authoritative.