NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 10 REPORT (SURVEY UNDERTAKEN BETWEEN 8TH FEBRUARY AND 15TH FEBRUARY 2021)

nestrans

Smarter Choices, Smarter Places
Supporting Sustainable Travel

SYSTRA

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IDENTIFICATION TABLE	
Project owner	Nestrans
Project	North East Transport Behaviour and Attitude Surveys
Study	Wave 10 Report (Survey undertaken between 8th February and 15th February 2021)
Type of document	Final Report
Date	10/03/2021
File name	20210310_Nestrans_Tracking Survey_W10 Final Report_v1.1.docx
Reference number	N13/6
Number of pages	15

APPROVAL

Version	Name		Position	Date	Modifications
1	Author	Marianne Woodyard	Project Manager	24/02/2021	
	Checked by				
	Approved by				
2	Author	Marianne Woodyard	Project Manager	03/03/2021	
	Checked by				
	Approved by				

TABLE OF CONTENTS

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 10 of 10 Waves. The data was collected between Monday 8th February and Monday 15th February 2021.

1.2.2 A total of 301 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; 48% of respondents were from Aberdeenshire and 52% 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 10th and 19th February[1] 2021.

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 5th and 7th February 2021[2].

1.2.5 The stay at home protection level continued to be in place for the majority of Scotland, including Aberdeenshire and Aberdeen City, after coming into effect on 5th January. The Covid-19 guidelines for the Stay at Home protection level during this survey period included[3]:

- 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;
- 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;

[1] https://www.transport.gov.scot/publication/covid-19-public-attitudes-survey-data-wave-13/
[2] https://www.transportfocus.org.uk/publication/week-36-travel-during-covid-19-survey/
[3] https://www.gov.scot/publications/coronavirus-covid-19-stay-at-home-guidance/

- 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.

2. JOURNEYS IN THE LAST SEVEN DAYS

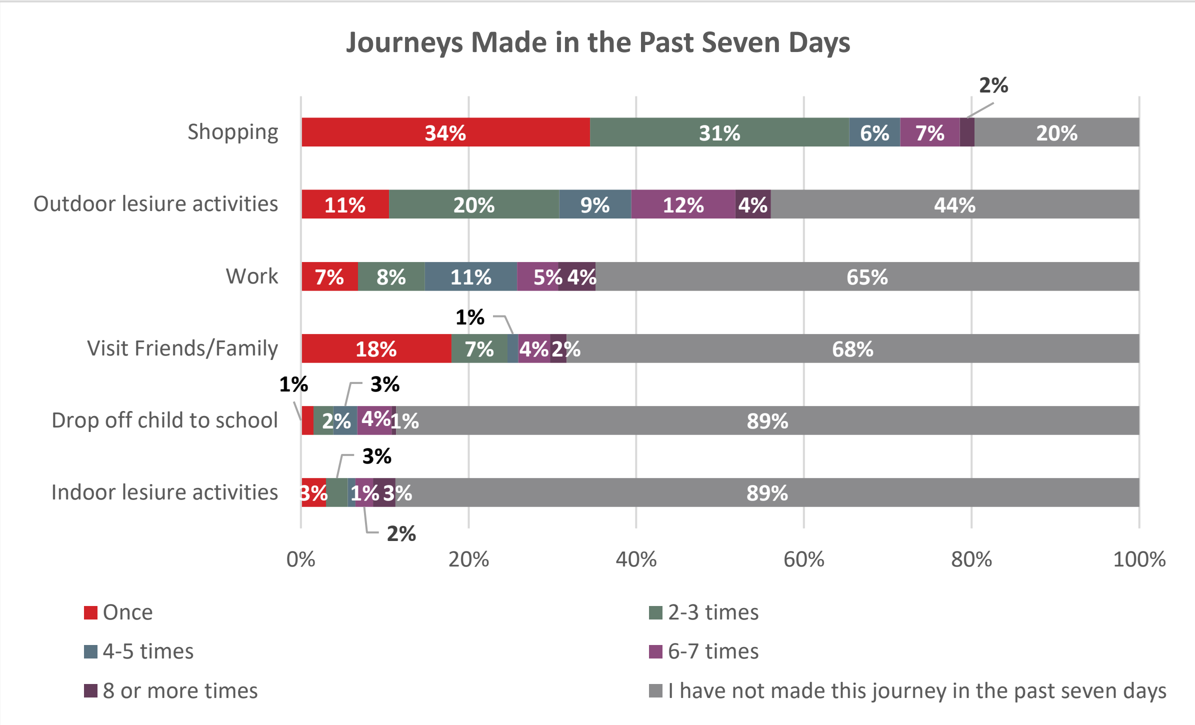
2.1.1 The majority of respondents (99%) had made at least one journey in the last seven days, higher than the wider Scottish population, for which around nine in ten (89%) had left their home in the last seven days

2.1.2 In the past seven days, the most frequently made trip was for shopping, with eight in ten (80%) respondents having made this trip at least once, and (65%) making this trip between one and three times. This is a decrease in respondents who travelled at least once to go shopping from Wave 9 (87%).

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, similar to Wave 9 (32%) and higher than the wider UK population (16%). Over twice as many had made trips to outdoor leisure activities (56%), lower than the wider Scottish population (75%). Only around one in ten (11%) had travelled to indoor leisure activities.

2.1.4 Over a third (35%) had travelled to work in the last seven days, similar to Wave 9 (33%) and the wider Scottish population (33%) as well as the rest of the UK (33%). Around one in ten (11%) had dropped of their child to school or nursery at least once in the last seven days.

2.1.5 Respondents from Aberdeen City were more likely than those from Aberdeenshire to have made at least one trip in the last seven days to go shopping (85% vs 76%) or to visit family and friends (38% 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 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.

2.1.7 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.

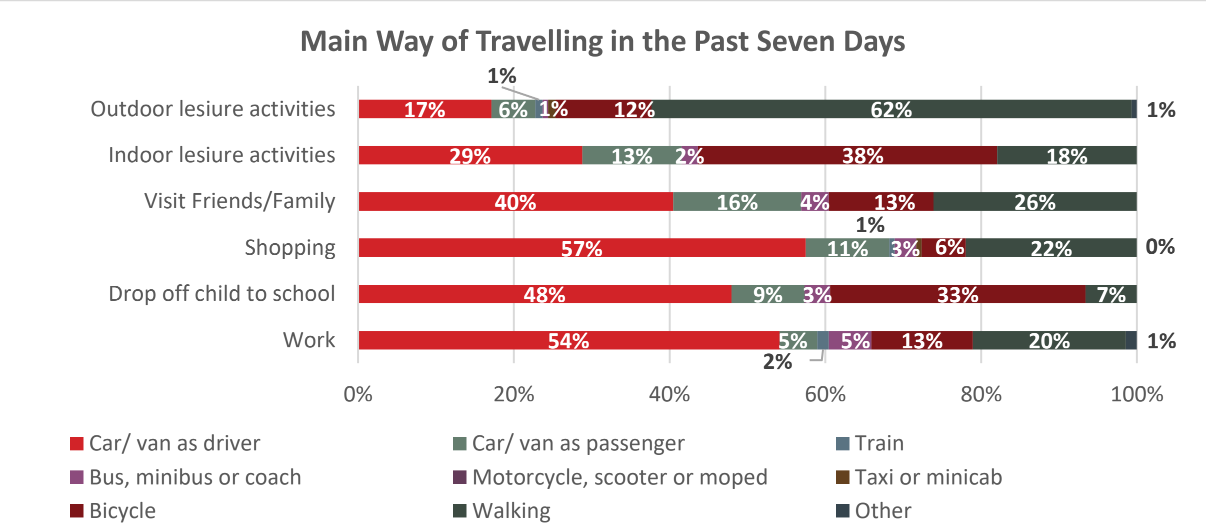
2.2 Ways of travelling

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 respondents reported walking (62%) as their main way of travelling almost three times as much as those who reported travelling by car (23%) as their main way of travelling.

2.2.2 Over a quarter (26%) of respondents travelled by walking as their main way of travelling to visit friends and family, while around a fifth walked to go shopping (22%), to work (20%); and to go to indoor leisure activities (18%).

2.2.3 Just under six in ten (59%) travelled by car or van as a driver or passenger to go to work, compared to 85% of the wider Scottish population.

2.2.4 Respondents from Aberdeen City were twice as likely as respondents from Aberdeenshire to undertake a journey for shopping by walking or cycling as their main way of travel (36% vs 18%).



2.3 Changes in Current Behaviour

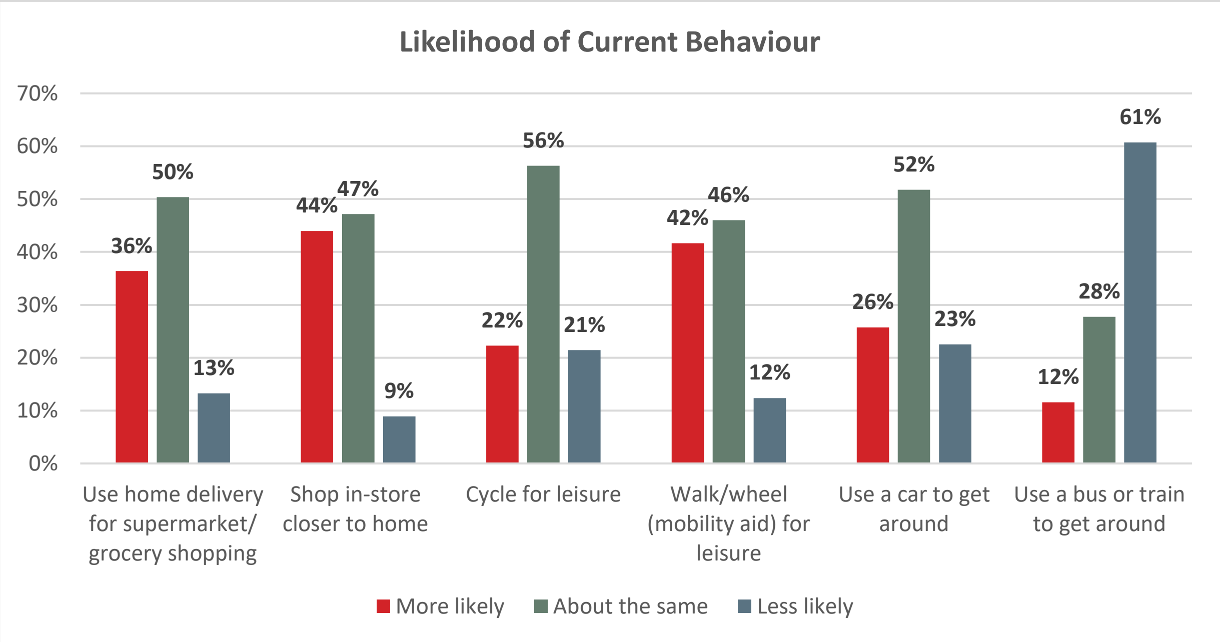
2.3.1 During the survey period, respondents have continued to report changes to the way they shop, compared to before Covid-19 travel restrictions were put in place. Just over a third (36%) reported that they were more likely to use home delivery for supermarket shopping than before restrictions were put in place, higher than the wider Scottish population (25%). Over two fifths (44%) reported that they were more likely to shop in-store closer to home, slightly lower than the wider Scottish population (52%). This is similar to Wave 9.

2.3.2 Respondents from cities, large town centers or suburbs were more likely than those from small towns, villages or rural areas to have reported that they are more likely to shop in-store close to home (50% vs 36%).

2.3.3 Respondents also suggested that they were more likely to engage in physical activity for leisure purposes than before Covid-19 restrictions, with over two fifths (42%) reporting that they were more likely to walk or wheel (mobility aid) for such purposes, and over a fifth (22%) reporting that they were more likely to cycle. This is an increase from Wave 9 (38% and 14% respectively).

2.3.4 Respondents from cities, large town centers or suburbs were almost twice as likely as those from small towns, villages or rural areas to have reported that they are more likely to cycle for leisure (28% vs 15%).

2.3.5 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

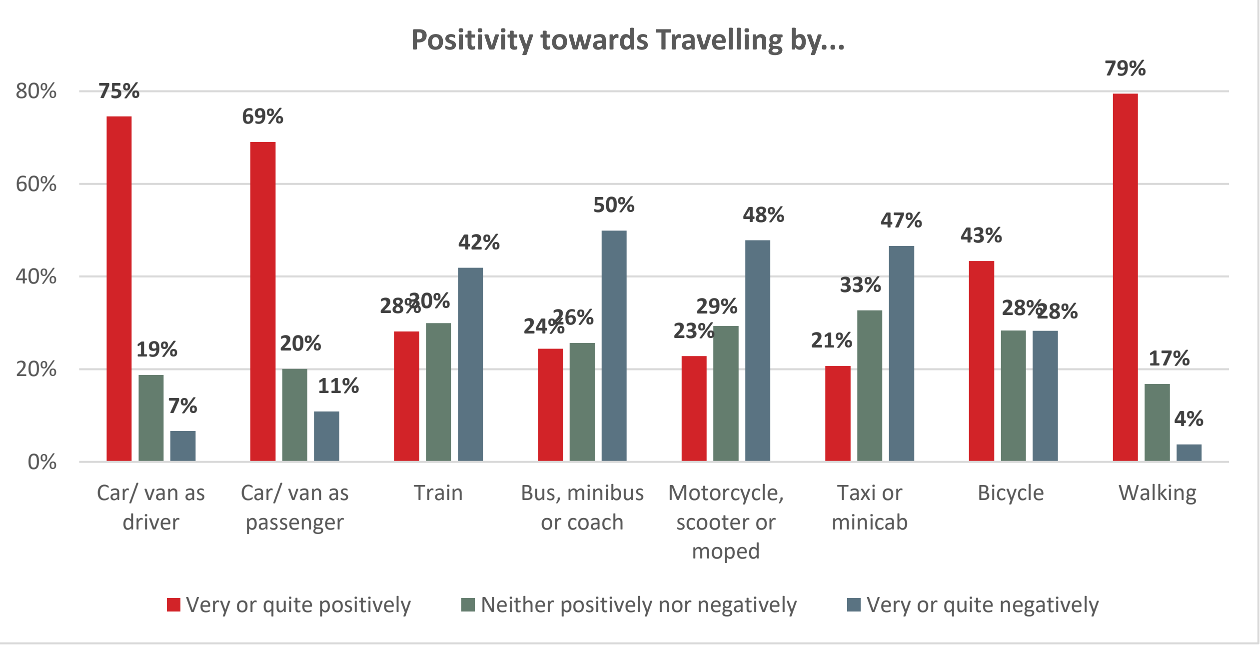
3.1.1 Three quarters (75%) of respondents reported that they felt positively towards travelling by car or van as a driver, while almost seven in ten (69%) felt positively towards travelling as a passenger in a car or van.

3.1.2 Just under eight in ten (79%) felt positively towards walking, while over two fifths (43%) felt positively towards travelling by bicycle.

3.1.3 Respondents from cities, large town centers or suburbs were more likely than those from small towns, villages or rural areas to have reported feeling positively towards travelling by bicycle (49% vs 35%).

3.1.4 Around half felt negatively towards travelling by bus, minibus or coach (50%); motorcycle, scooter or moped (48%); taxi or minicab (47%); and train (42%).

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 more likely to feel positively towards travelling by train (42% vs 18%) and bus (39% vs 13%) 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:

- Concern over catching coronavirus/other illness (53%);
- Cost/too expensive (46%);

- Concerns that social distancing may not be in place (46%);
- Travelling by car is easier/more convenient (44%); and
- Behaviour of other passengers (30%).

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

- Concern over catching coronavirus/other illness (51%);
- Concerns that social distancing may not be in place (44%);
- Travelling by car is easier/more convenient (43%);
- Behaviour of other passengers (37%); and
- Lack of cleanliness on board (37%).

3.2 Current Safety Concerns and Measures

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

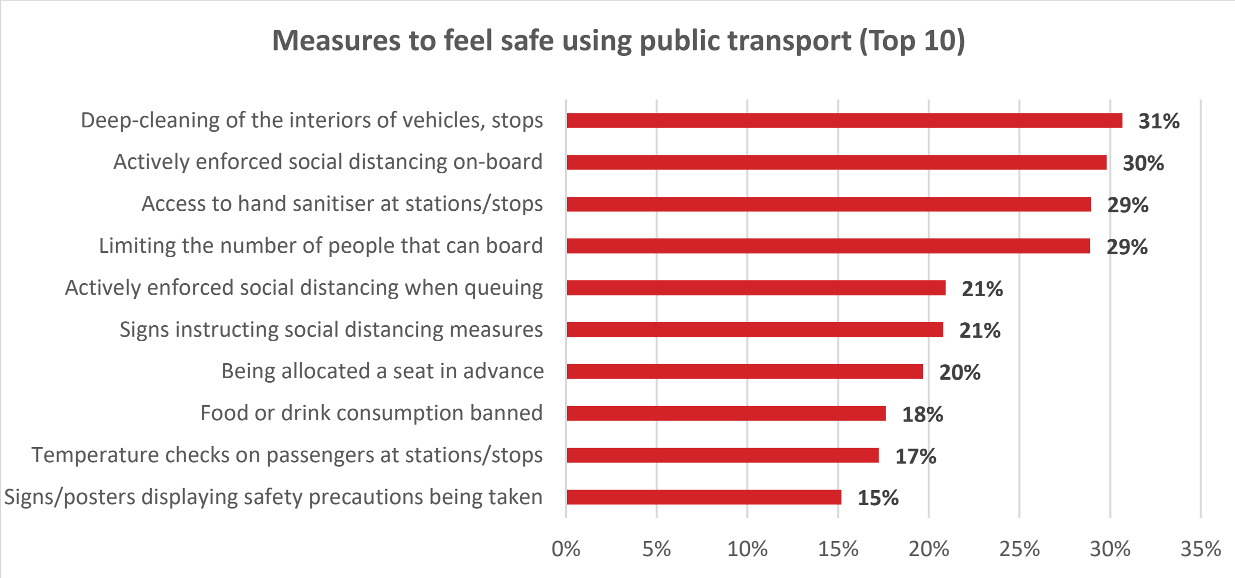
- Taxis/minicabs (81%);
- Public transport (79%); and
- Shared transport methods, including car clubs or car sharing (78%).

3.2.2 Similarly, three quarters of the wider Scottish population reported being concerned about spreading or contracting the virus whilst using public transport (75%) and taxis or minicabs (75%).

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:

- Deep-cleaning of the interiors of vehicles, stations and bus stops (31%);
- Actively enforced social distancing on-board, through staff presence and CCTV (30%);
- Access to hand sanitiser at stations/stops (29%);
- Limiting the number of people that can board the train/tram/bus (29%); and
- Actively enforced social distancing when queuing for tickets through staff presence and CCTV (21%).



3.2.5 Around a fifth (21%) of respondents suggested that they already felt safe using public transport, while a quarter (25%) 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 (57% and 30% respectively). Walking and cycling have also been used to replace journeys that normally would have been made another way (34% and 24% respectively). This is an overall increase from Wave 9.

4.1.2 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 (84%).

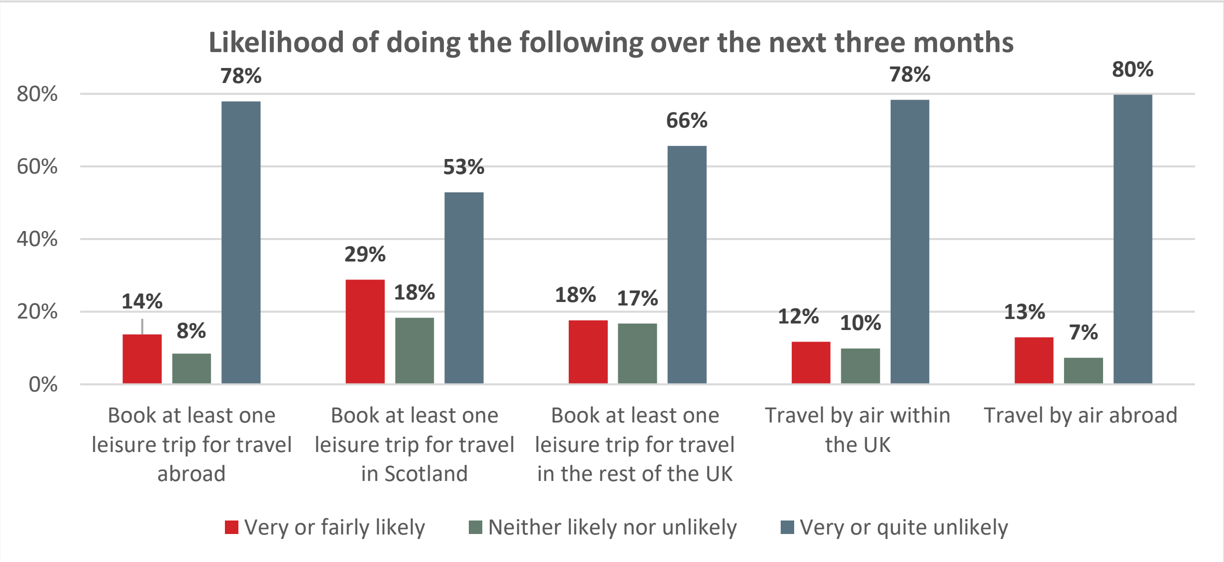
4.2 Travelling further afield and future travel

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 (85%); to work (84%); to go shopping (79%); to indoor leisure activities (72%); to outdoor leisure activities (74%); or to visit family and friends (70%).

4.2.2 Less than a sixth anticipate an increase in outdoor leisure activities (15%), while just over one in ten anticipate an increase in shopping (12%) and visits to family and friends (11%).

4.2.3 Around a fifth anticipate a decrease in trips to indoor leisure activities (21%) and to visit friends and family (20%).

4.2.4 Almost three in ten (29%) 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%). This is similar to previous waves.



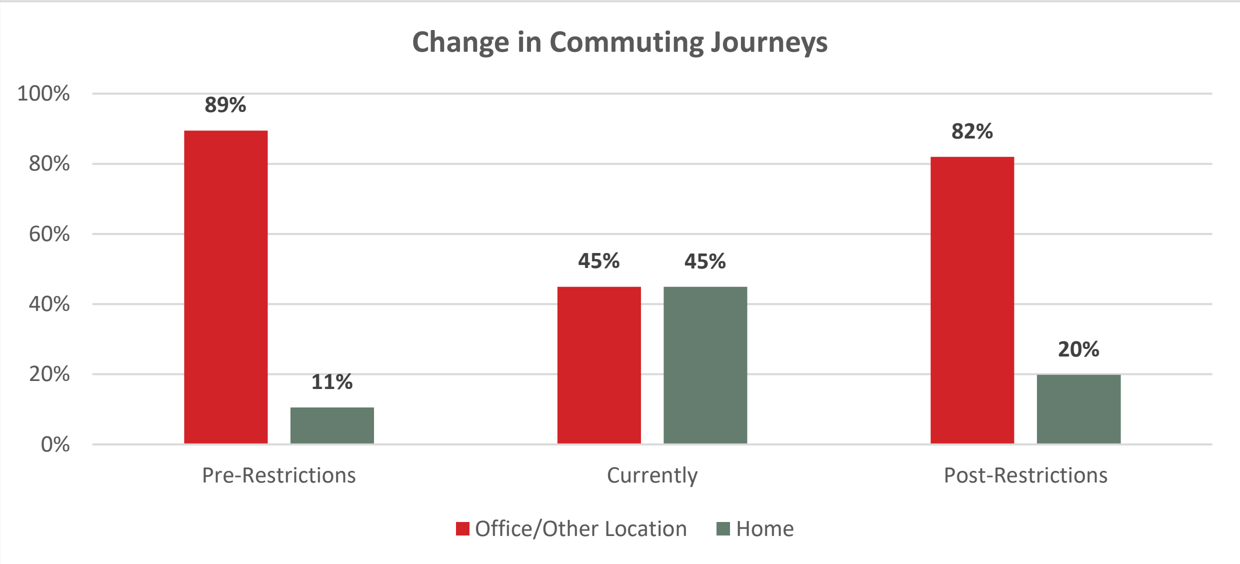
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting Trips

5.1.1 Of the 63% of respondents who reported that they were working before Covid-19 restrictions, just under three quarters (73%) were working full-time (i.e. five days a week or more) and just over a quarter (27%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) on 89% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 45% commuting of their working time, while 45% are working from home and 12% are furloughed.

5.1.3 Once all restrictions are lifted, on average, respondents predict making commuting journeys on 82% of their working days. This is equivalent to an average reduction in commuting journeys of 7%, from before Covid-19 restrictions. This is a smaller reduction than seen in previous waves.



5.1.4 Just under five in ten (48%) respondents would like to work more flexibly, with more flexible working hours (24%); changing start/finish times (21%); and/or working the same hours over fewer days (16%). This is a slight increase in those who would like to work more flexibly from Wave 9 (40%).

5.2 Journey Time and Mode

5.3 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.

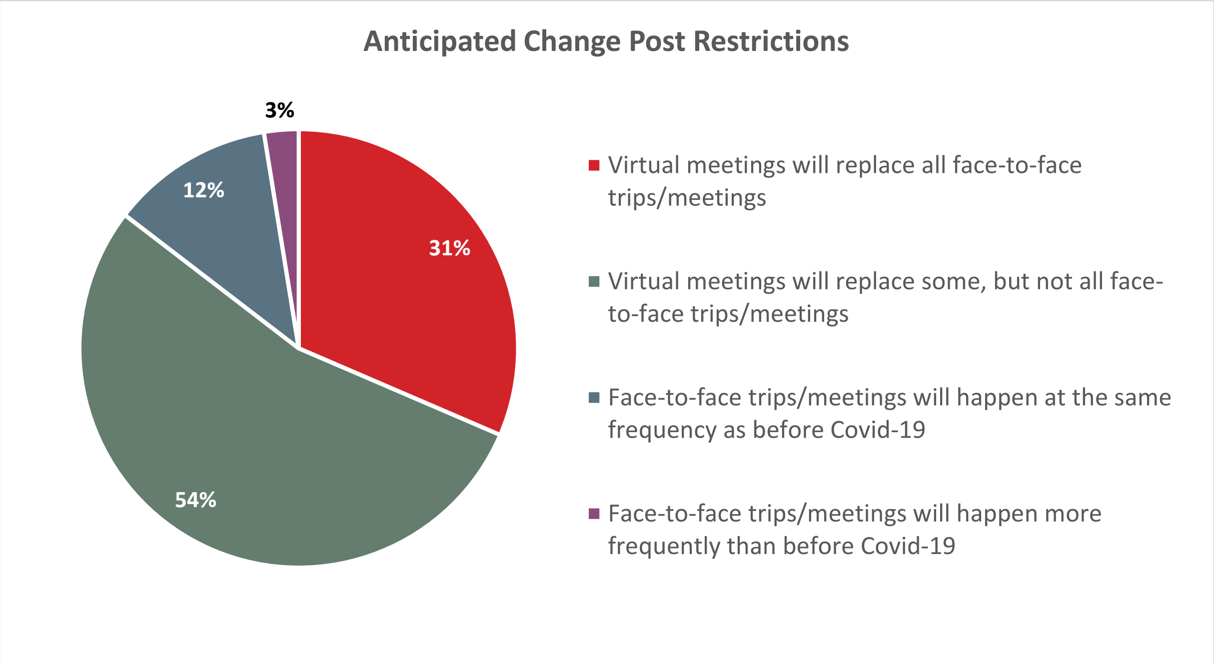
5.3.1 Respondents expect to travel to work by car or van as either a passenger or driver, or by motorbike, similar amounts once restrictions are lifted (62%), as to before restrictions were in place (64%). Respondents anticipate using public transport, a train or a bus, slightly less post restrictions for their commute (10%), compared to before restrictions were in place (16%).

5.3.2 Respondents from Aberdeenshire are more likely than those from Aberdeen City to anticipate travelling to work by car (77% vs 53%) and less likely to anticipate travel by walking or cycling (19% vs 32%) after Covid-19 restrictions are lifted.

5.4 Business Trips

5.4.1 Before Covid-19 restrictions, around four in ten (39%) of working respondents took part in business meetings, with the majority (66%) travelling to attend between one and four business meetings in an average month.

5.4.2 Almost nine in ten (85%) 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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