NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

REPORT ON KEY TRENDS OVER 10 SURVEY WAVES

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Smarter Choices, Smarter Places
Supporting Sustainable Travel

SYSTRA

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EXECUTIVE SUMMARY

In March 2020 travel restrictions were introduced in Scotland as a result of the Covid-19 pandemic. To understand any changes in travel attitudes and behaviour in the north east of Scotland during the restrictions, Nestrans, in partnership with Aberdeen City and Aberdeenshire Council, and with support from Paths for All, commissioned monthly travel behaviour and attitude surveys.

Attitudinal and behavioural surveys were undertaken each month, between July 2020 and February 2021, delivered through an online panel. Half the sample were from Aberdeen and half from Aberdeenshire. The data used in the reports was weighted to ensure the sample was representative of the Nestrans region by age and gender. Due to the evolution of the Covid-19 pandemic across the ten months, results show how the population has reacted to the different elements of lockdown, rather than the progressive recovery, as had been anticipated at the point at which the study was commissioned.

Following each of the ten survey waves, individual survey reports were completed and published, allowing stakeholders to closely track changes in attitudes and behaviours. This report presents key results looking at key changes across that eight month period, allowing the identification of key trends and other substantive findings.

Some key findings from the work, across the ten survey waves, are as follows:

- The impact of Covid-19 travel restrictions reduced journeys to work, visits to friends and family, and trips to indoor leisure activities. If Covid-19 travel restrictions were not in place, respondents predicted that they would have made, on average, and depending on survey wave, approximately:
  - 1.5-2 times as many journeys to work;
  - 1.5-3 times as many trips to visit family and friends; and
  - 3-6 times as many trips to indoor leisure activities.
- The changing Covid-19 travel restrictions also influenced the frequency with which journeys for essential purposes were undertaken, such as for work or shopping. For those making journeys to work, around 50% were making four or more trips at the beginning of lockdown, compared to around 65% during late Summer and early Autumn. This then fell back to around 50% just after Christmas when stricter restrictions were in place;
- Positivity towards travelling by foot and bicycle remained consistently high across the waves with, on average, over 70% feeling positive towards walking, and around 40% towards travelling by bike. Positivity towards travelling by car (either as driver or passenger) also remained high at around 60%.
- By contrast, positivity towards shared ways of travelling, including bus, train and taxi, remained low across the survey waves, at less than 30%, although there has been a discernible increase in positivity apparent from late Autumn which has been sustained;
- Around a third of respondents were more likely to walk for leisure currently than they did before the pandemic restrictions, and around fifth of respondents were more likely to cycle for leisure purposes;

- Working respondents predict an average reduction in commuting journeys of around a tenth in the future, compared to before the pandemic, as they anticipate a greater occurrence of working from home;
- Around two fifths of working respondents suggested that they would like to work more flexibly in the future than they did before the pandemic; and
- The majority of respondents who previously took part in business meetings predict that virtual meetings will replace some or all face to face business meetings once all restrictions have been lifted.

This study forms an important component, alongside other data sources, in understanding changes in travel behaviour and attitudes during the pandemic. It is also a signpost towards what changes might remain into the future. However, whilst Covid-19 restrictions continue to remain in place, and as they begin to reduce, it will be important to continue to monitor changing patterns in attitudes and behaviour in order to successfully target guidance to promote active and sustainable modes, and to build a long-term regional transport strategy which suits current and anticipated future demand for travel.

1. INTRODUCTION

1.1 Objectives

1.1.1 This report provides the findings of research undertaken by SYSTRA on behalf of Nestrans, in partnership with Aberdeen City and Aberdeenshire Council, and with support from Paths for All.

1.1.2 The research has been undertaken to better understand changes in travel attitudes and behaviour in the north east of Scotland during the current Covid-19 restrictions.

1.1.3 Further waves may be commissioned to understand changes during the recovery period.

1.2 Approach

1.2.1 Travel behaviour and attitude surveys, administered by SYSTRA, were delivered through an online panel, issued every month between July 2020 and February 2021. Each of the ten survey waves were undertaken with a different sample of respondents. However it is likely there was some overlap across the waves. Between 280-350 respondents took part in each survey wave, with approximately half from Aberdeen and half from Aberdeenshire.

1.3 This Report

1.3.1 A full report of findings was provided following each survey wave, and key changes in attitudes and behaviour from the previous wave were highlighted.

1.3.2 This report focusses on the longitudinal findings in the Nestrans region over the ten survey waves, highlighting any significant changes over time.

1.3.3 The data used in this report has been weighted to ensure the sample is representative of the Nestrans region by age and gender.

1.3.4 Throughout the report relevant external factors that could have influenced the research results have been highlighted. A timeline of these factors is provided in Chapter Two. These include:

- Tightening and relaxing of Covid-19 guidelines and legislation;
- Public transport incidents; and
- Changes in school openings/closures.

2. TIMELINE OF EXTERNAL EVENTS

3. JOURNEYS IN THE LAST SEVEN DAYS

3.1 Introduction

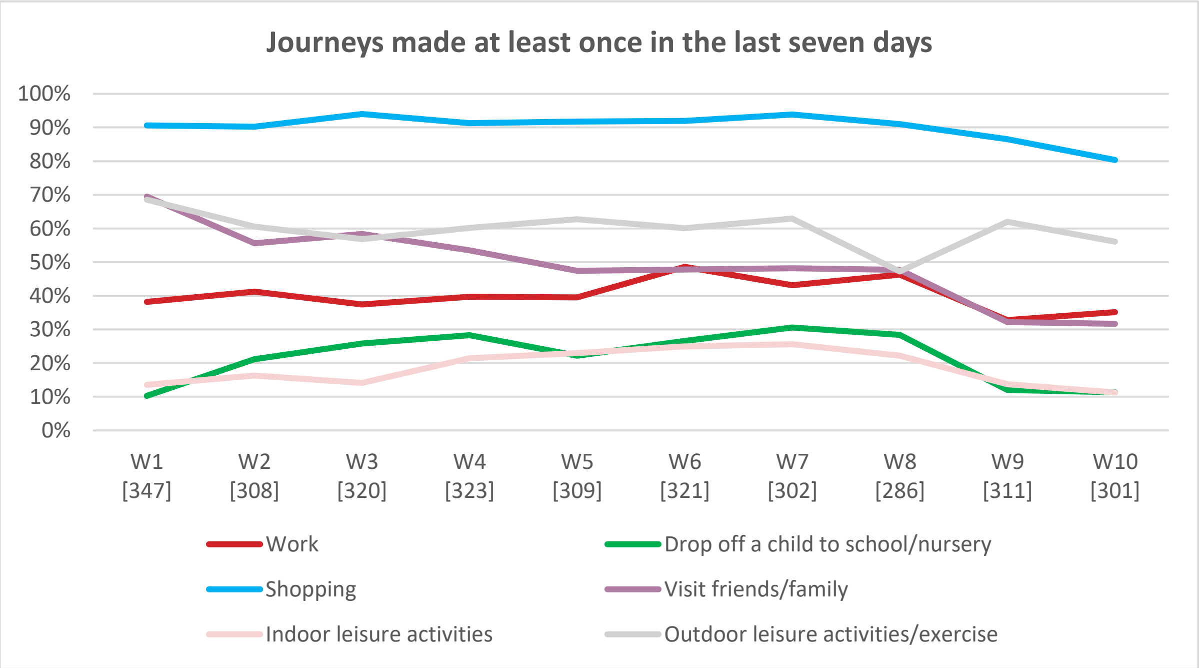
3.1.1 This chapter explores journeys made by survey respondents in the last seven day. In particular it describes how the following have changed over the ten month research period:

- Frequency of journeys made for different purposes;
- Main mode of transport used for different journey purposes; and
- Changes in shopping, leisure and travel behaviour.

3.2 Frequency of journeys made for different purposes

3.2.1 Figure 1 shows an overview of the types of journeys made at least once in the last seven days, across the ten survey waves. In all waves, at least 99% of respondents made at least one trip during the last seven days; for 9 waves, this was 100%.

3.2.2 The frequency of journeys being made at least once in the last seven days remained broadly consistent across the ten waves, with the largest changes occurring from Wave 8 onwards. Around this time, frequency of all trips (except outdoor leisure journeys) began to decline. This coincided with increased Covid-19 cases and stricter guidelines being introduced across Scotland, which is likely to have resulted in people making fewer journeys than seen in the summer and autumn months.

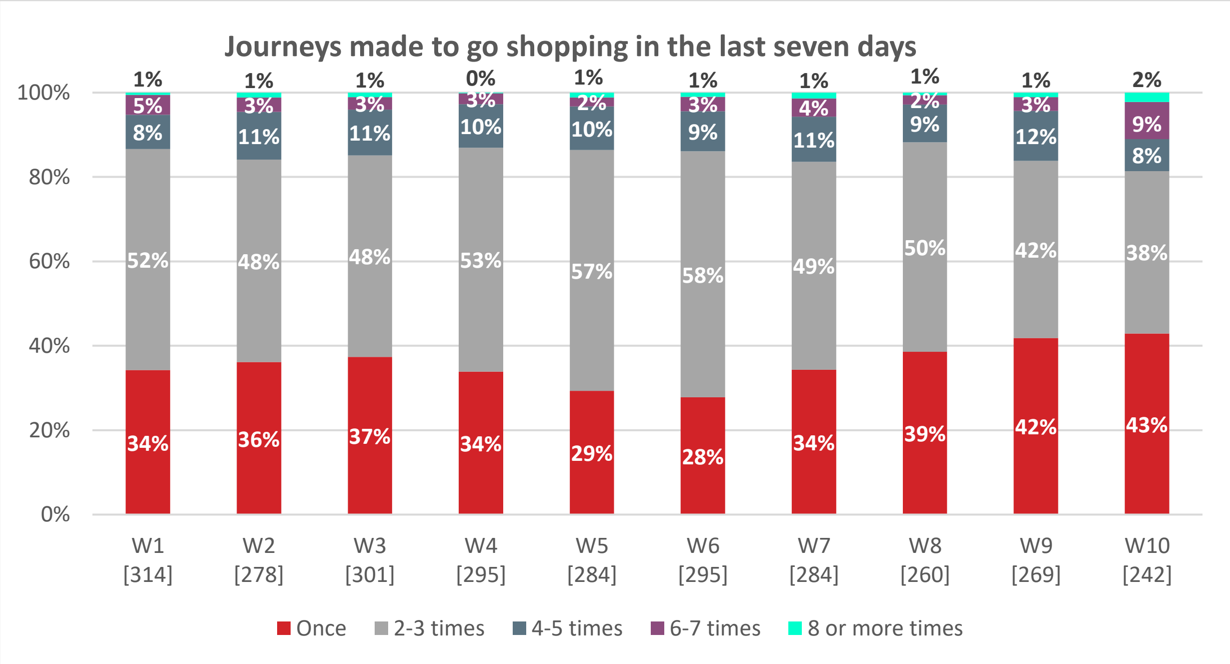


Base: All respondents (varies by wave: 286-347)

Figure 1. **Journeys made at least once in the last seven days**

3.2.3 Shopping was the most consistently undertaken trip, with around nine in ten undertaking this trip in the last seven days across the ten waves. The highest proportion of reported shopping trips were made in Wave 3 (94%), and the lowest was in Wave 10 (80%), which reflect the points in time at which restrictions were most relaxed, and subsequently tightened again.

3.2.4 Figure 2 provides a further breakdown of journey frequency for shopping trips over the ten survey waves. Of the respondents who made a shopping trip, the majority did so between one and three times in the last seven days. During Waves 5 and 6, over 70% (71% and 72%) made a shopping trip more than once. This reduced to just over half (58% and 57%) in Waves 9 and 10 when restrictions tightened, and in the winter months.

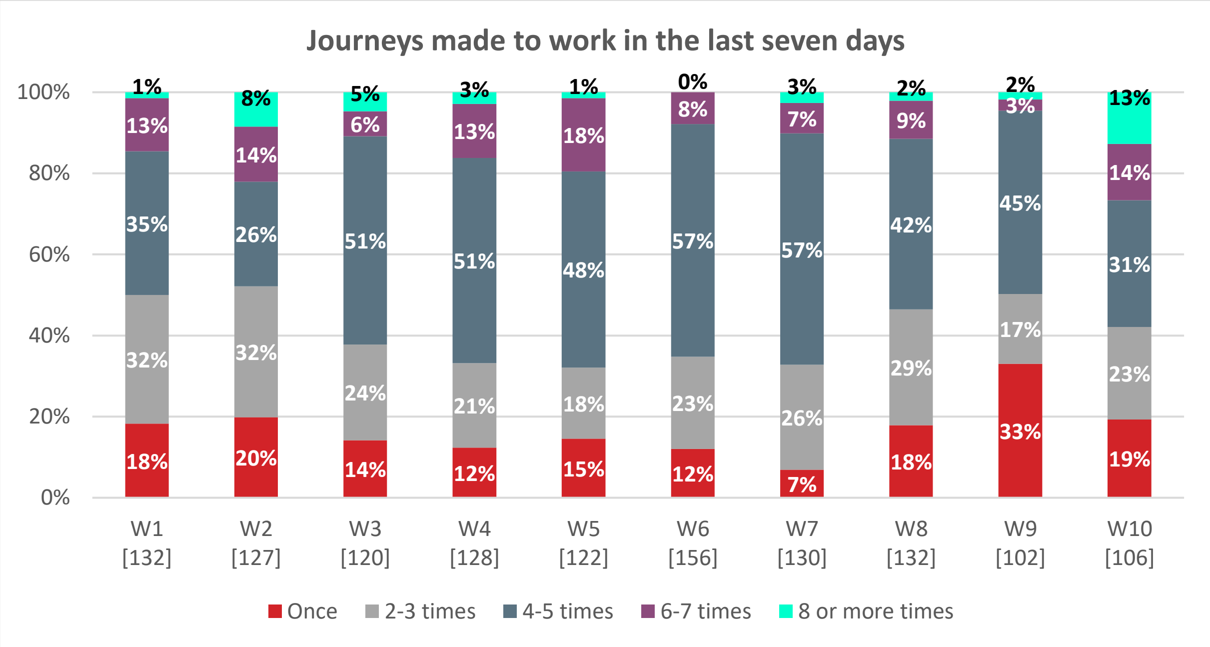


Base: Respondents who made a shopping trip in the last seven days (varies by wave: 242-314)

Figure 2. **Frequency of Shopping Journeys in the Last Seven Days**

3.2.5 Journeys to work have varied somewhat across the waves. Figure 1 shows that commuting journeys made at least once a week remained constant over the first five waves, followed by a slight increase in Waves 6 to 8, and a decrease in waves 9 and 10, when there was an increase in Covid-19 cases, and stricter guidelines were introduced.

3.2.6 Figure 3 provides a further breakdown of journey frequency for commuting over the ten survey waves. Of those commuting to work, from Wave 3, respondents who were making at least four commuting journeys in the last seven days increased, from around half in Waves 1 to 2, to between 60% and 70% in Waves 3 to 7, possibly reflecting attempts to return to more normal working patterns. Frequency of journeys decreased however from Wave 8 during the Christmas period, through to the tighter Covid-19 restrictions during Wave 9 and Wave 10.

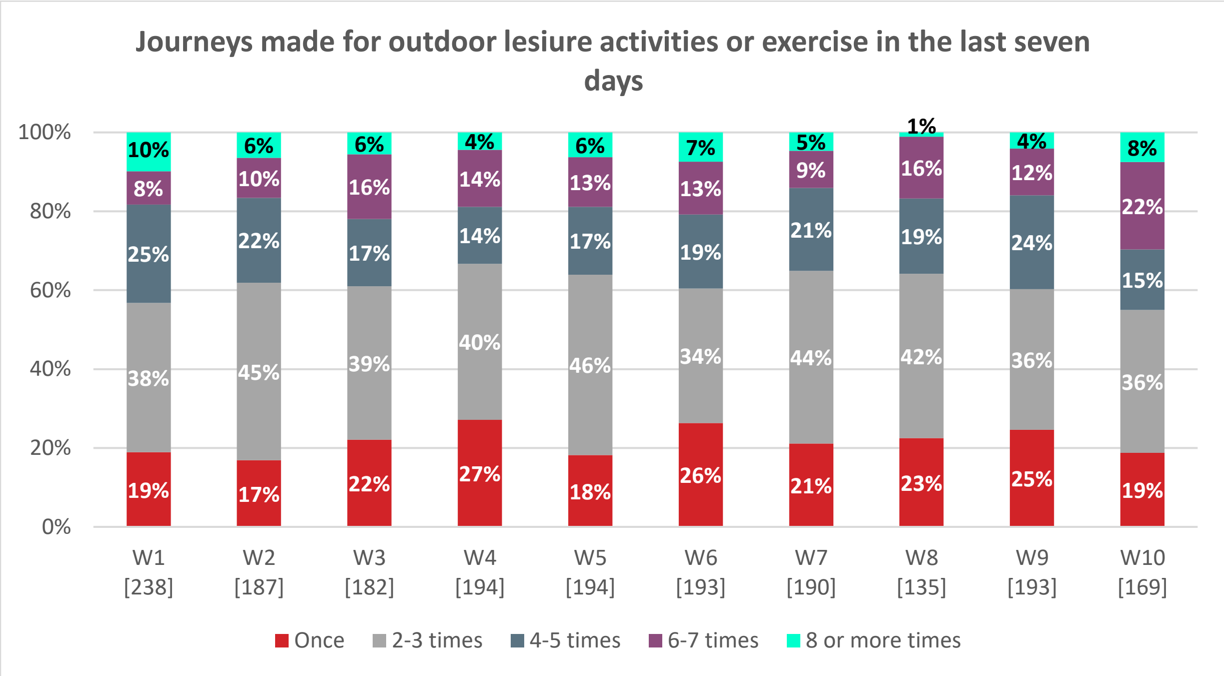


Base: Respondents who made a journey to work last seven days (varies by wave: 102-156)

Figure 3. **Frequency of Journeys to Work in the Last Seven Days**

3.2.7 For the majority of waves, around six in ten respondents undertook at least one outdoor activity journey or exercise in the last seven days. Figure 1 shows that this has remained fairly constant across waves, other than in Wave 1 where it was around 70%, and Wave 8 where it was just under 50%.

3.2.8 Figure 4 provides a further breakdown of journey frequency for outdoor leisure and exercise over the ten survey waves. The proportion of respondents who reported making these types of journeys more than once a week remained consistent (between 73% and 83%) across all waves.



Base: Respondents who made outdoor activity journeys for exercise in last seven days (varies by wave: 242-314)

Figure 4. **Frequency of Journeys to Outdoor Leisure Activities or Exercise in the Last Seven Days**

3.2.9 If there were not any Covid-19 travel restrictions and guidance in place, respondents across the waves predicted that they would have made many more journeys in the past seven days. This includes, on average, and depending on survey wave, approximately:

- 1.5–2 times as many journeys to work;
- 1.5–3 times as many trips to visit family and friends; and
- 3-6 times as many trips to indoor leisure activities.

3.2.10 Respondents generally 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.

3.3 Main modes of travel

3.3.1 Travelling by car was consistently the most frequently used main way of travelling for all journey purposes, with the exception of outdoor leisure activities.

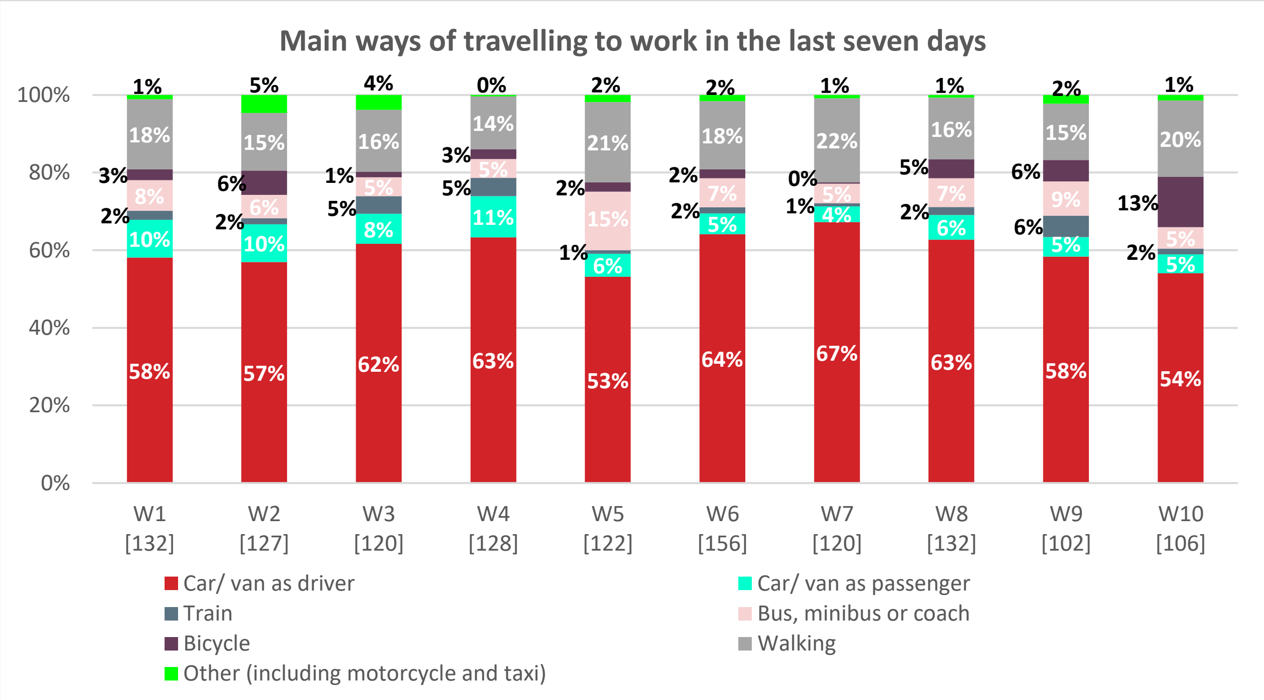
3.3.2 Consistently, across all waves, the main way of travelling to outdoor leisure activities was walking, with the gap between walking and driving varying across waves, depending on the time of year.

Travelling to work

3.3.3 Across all ten survey waves, for those who had commuted in the last seven days, travelling by car or van as a driver was the most common main way of travelling (53%-67%). The proportion of respondents travelling to work by car or van as a passenger was higher in the first four waves (8%-11%), however this dropped marginally in the most recent six waves (4%-6%).

3.3.4 Travelling to work by bus, minibus or coach was much more varied across the waves. Commuting via bus peaked during Wave 5 (15%), however for the rest of the waves, less than 10% commuted this way as their main way of travel.

3.3.5 Around a sixth of respondents consistently walked as their main way of travel for their commute to work, with slightly more walking to work during the warmer Waves 5 and 7 (21%-22%) before decreasing during the colder months, and appearing to pick up during Wave 10, which took place in February 2021.



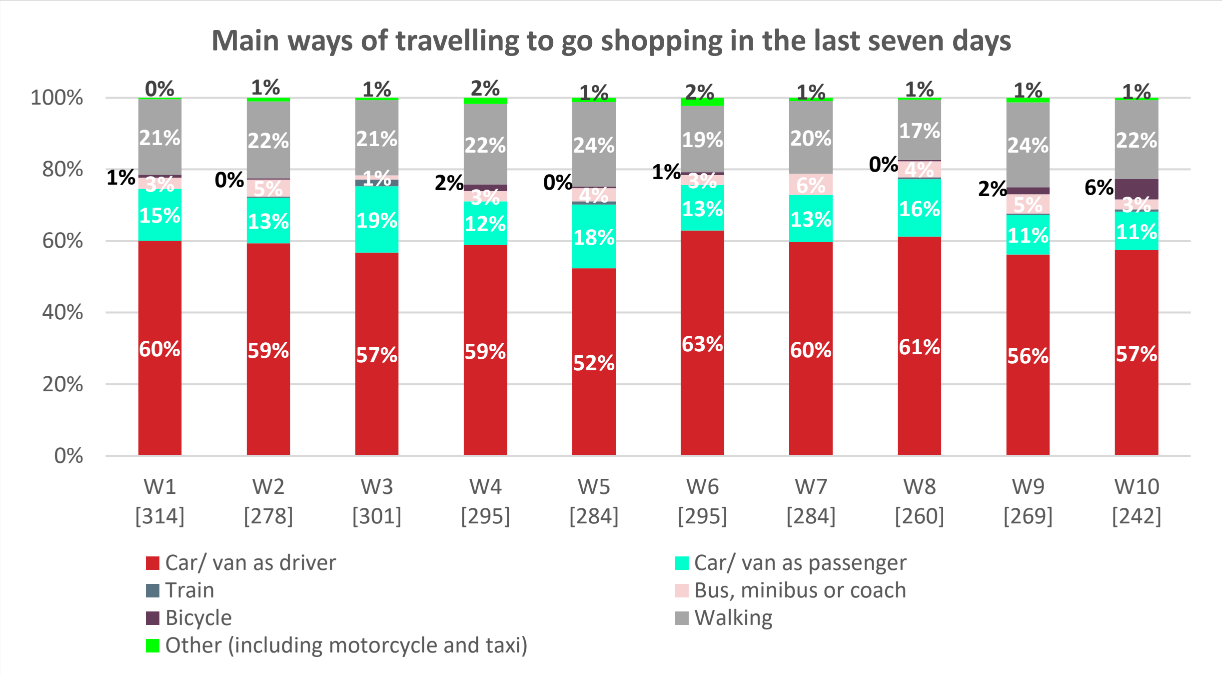
Base: Respondents who travelled to work in the last seven days (varies by wave 102-156)

Figure 5. **Main ways of Travelling to Work in the Last Seven Days**

Travelling to go shopping

3.3.6 Similar to other journey purposes, travelling by car was the most commonly used main way of travelling for those who had gone shopping, with consistently over half travelling by car or van as a driver (52%-63%).

3.3.7 Generally between a fifth and quarter of respondents who reported that they had gone shopping, undertook this journey on foot (17%-24%). This was the second most common way of travelling.

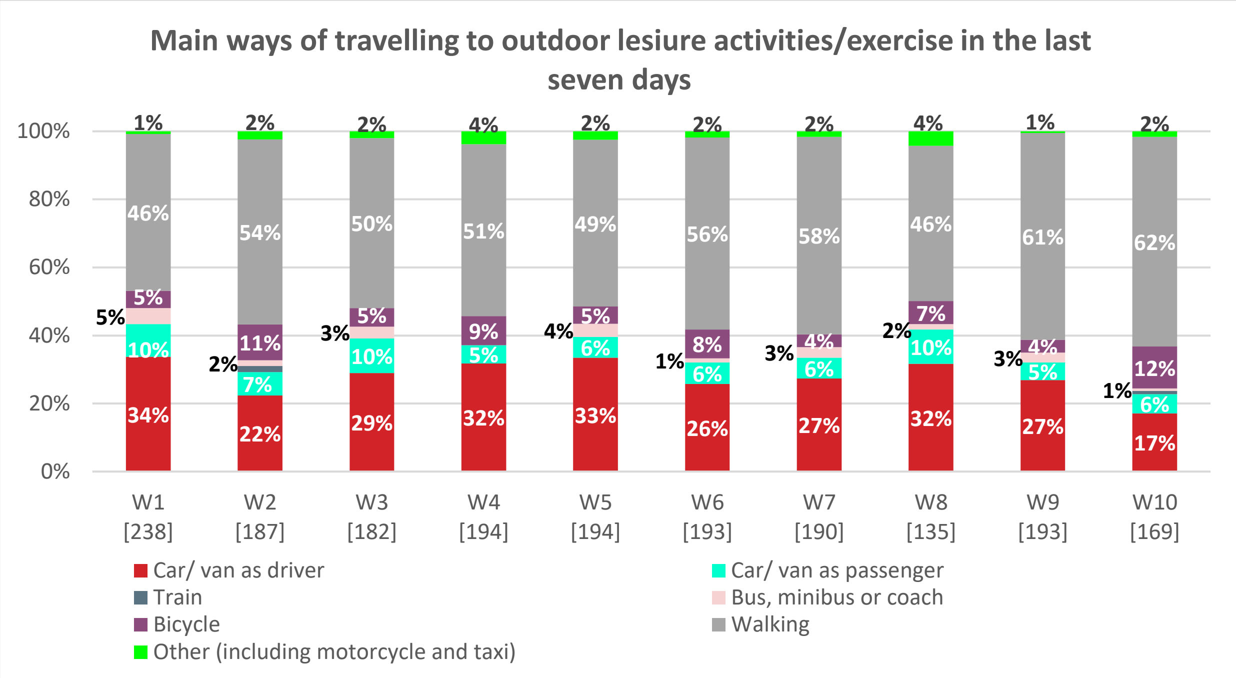


Base: Respondents who made shopping trips in the last seven days (varies by wave: 242-314)

Figure 6. Main way of travelling to go shopping in the last seven days

Travelling to go outdoor leisure activities and exercise

3.3.8 For all ten waves, walking was the most common way of travelling to outdoor leisure activities or for exercise. Whilst walking accounted for around 50% of respondents' main way of travel for this purpose in most months, it rose to over 60% in the last two waves. Around one in ten cycled during certain waves to access outdoor leisure or for exercise.



Base: Respondents who made outdoor leisure activities journeys or exercised in the last seven days (varies by wave 135-238)

Figure 7. **Main ways of travelling to outdoor leisure activities/exercise in the last seven days**

3.4 Changes in behaviour since before Covid-19

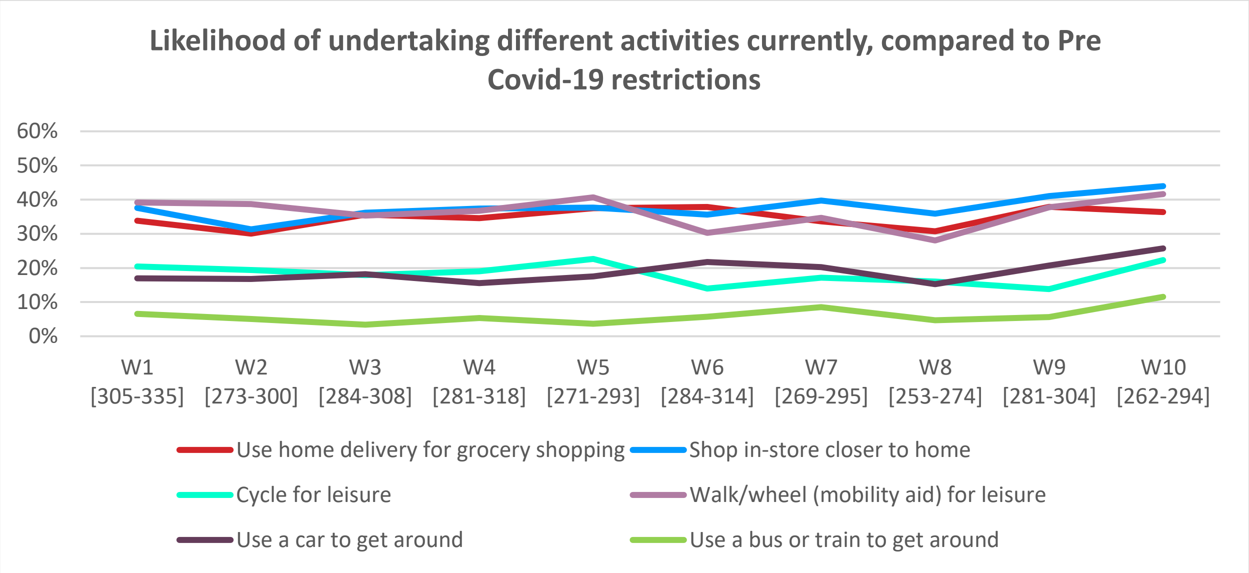
3.4.1 Figure 8 provides an overview of changes in behaviour during the survey waves, compared to behaviour before Covid-19.

3.4.2 Around a third of respondents consistently reported that they were more likely to use home delivery for grocery/supermarket shopping, shop in-store closer to home and walk/wheel for leisure purposes, now, compared to before Covid-19. While this behaviour somewhat decreased between Wave 6 and Wave 8, it started to increase for the remaining waves. This is likely to be reflective of the stricter Covid-19 guidelines in place during Waves 9 and 10.

3.4.3 Around a fifth of respondents reported that there were more likely to cycle for leisure now, compared to before Covid-19, and this proportion was slightly lower during the waves which coincided with autumn/winter months.

3.4.4 Around a fifth of respondents consistently reported that they were more likely to use a car to get around now, compared to before Covid-19 restrictions were introduced, with the proportion rising towards the end of the survey waves.

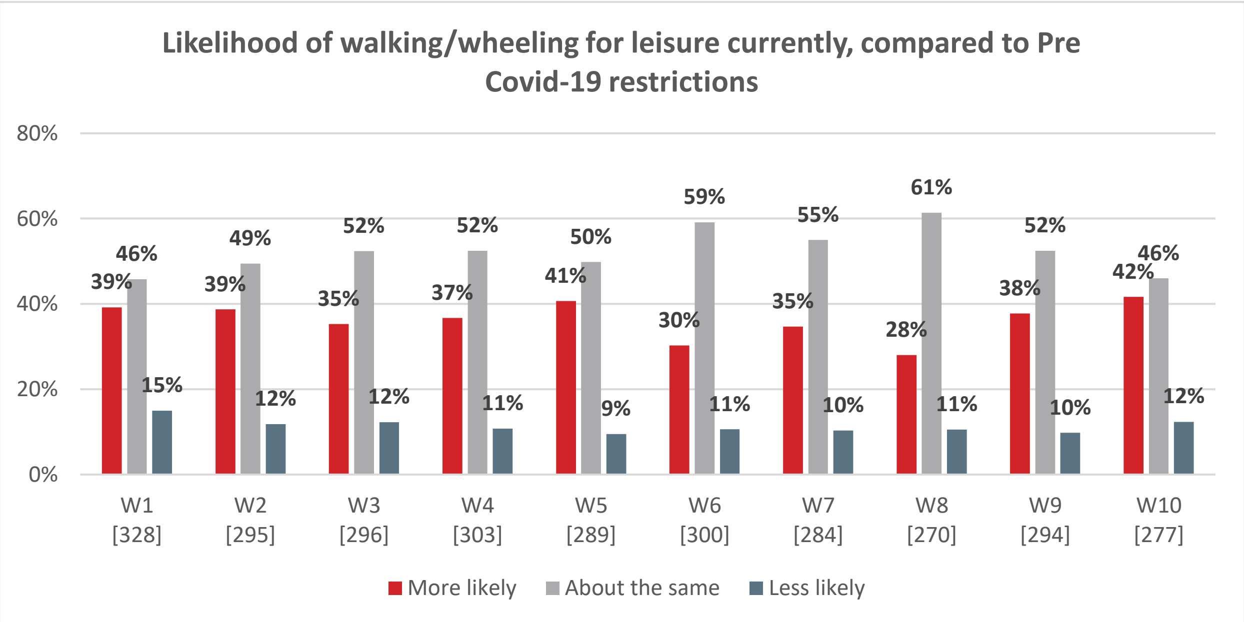
3.4.5 Less than one in ten respondents reported that they were more likely to use a bus or train to get around now, compared to before Covid-19, as would be expected, under the continued guidelines and restrictions. However the proportion has been rising slightly towards the end of the survey period.



Base: All respondents excluding those who answered 'Don't know' (varies by wave 253-335)

Figure 8. Likelihood of undertaking different activities currently, compared to Pre Covid-19 restrictions

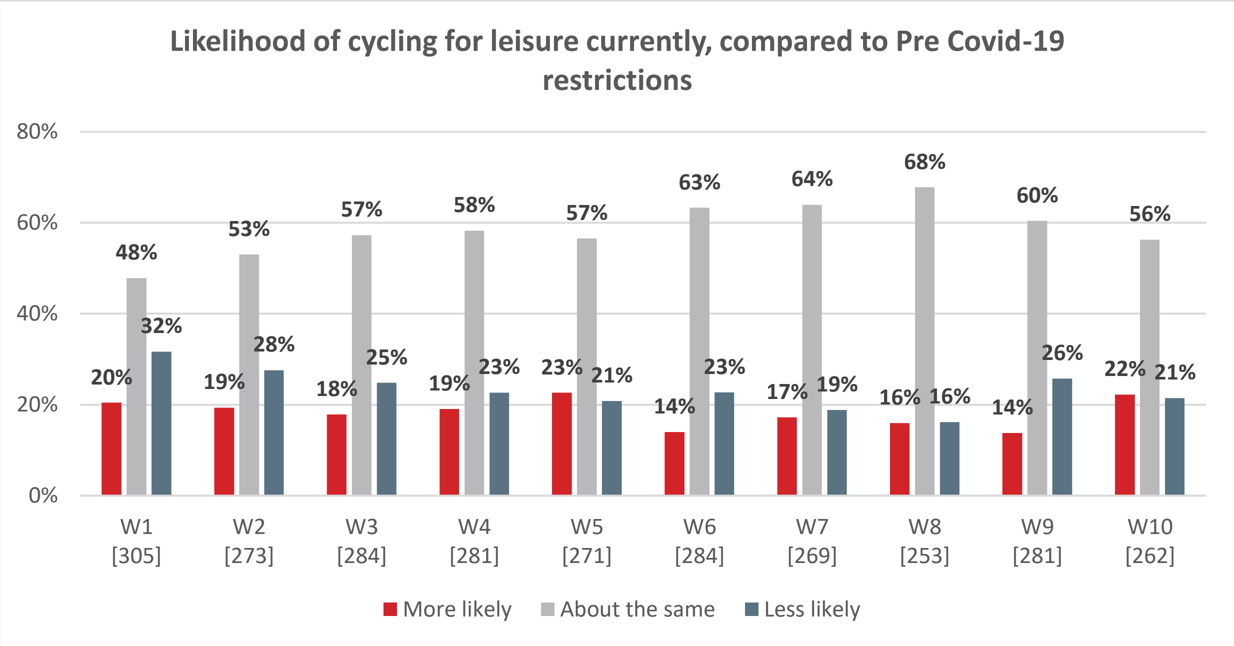
3.4.6 Around half of respondents consistently reported that the likelihood of them walking or wheeling since Covid-19 restrictions was about the same. In most months over a third reported that they would be more likely to walk or wheel compared to pre Covid-19 restrictions and less than a sixth reported that they would be less likely to. While likeliness to walk decreased during the autumn/winter months, it has begun to increase again over the most recent waves.



Base: All respondents excluding those who answered 'Don't know' (varies by wave: 270-328)

Figure 9. Likelihood of walking/wheeling for leisure currently, compared to Pre Covid-19 restrictions

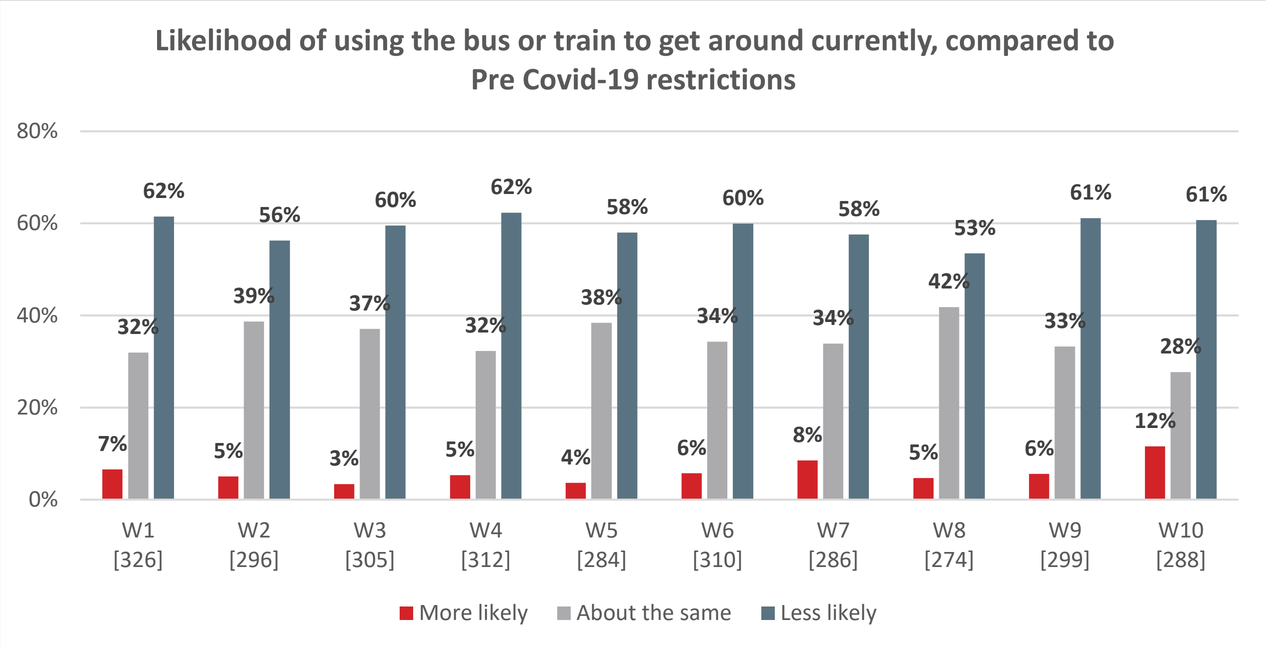
3.4.7 Figure 10 shows that between 14% and 23% reported that they would be more likely to cycle for leisure currently, compared to before Covid-19 restrictions. While this figure was higher during Waves 1 to 5, which coincided with warmer months, compared to subsequent waves, it picked up again in Wave 10.



Base: All respondents excluding those who answered ‘Don’t know’ (varies by wave: 253-305)

Figure 10. **Likelihood of cycling to get around currently, compared to Pre Covid-19 restrictions**

3.4.8 Figure 11 provides further detail on how likely respondents are to use the bus or train to get around now, compared to before Covid-19. While few respondents reported that they were more likely to use a bus or train to get around now, compared to before Covid-19 restrictions (and this figure was at its highest level in the last wave, 12%), around six in ten consistently reported that they would be less likely to do so.



Base: All respondents excluding those who answered ‘Don’t know’ (varies by wave: 274-236)

Figure 11. **Likelihood of using the bus or train to get around currently, compared to Pre Covid-19 restrictions**

4. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

4.1 Introduction

4.1.1 This chapter explores respondents' feelings towards different ways of travelling, in particular their positivity and negativity towards different modes, their concerns about safety, and their views on how safety concerns can be mitigated.

4.2 Feelings towards travelling by different modes of transport

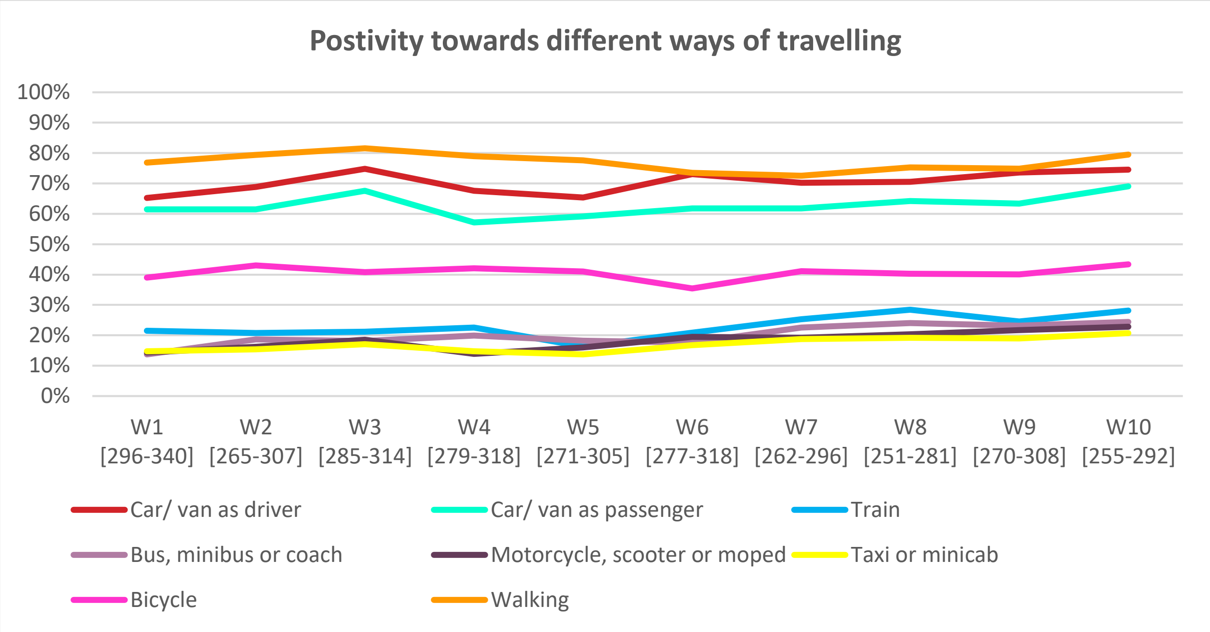
4.2.1 Positivity towards different ways of travelling remained relatively consistent across the ten waves, as shown in Figure 12.

4.2.2 Around eight in ten felt positively towards walking for the first five waves (77%-82%). While the level of positivity towards walking decreased to around seven in ten for subsequent waves, coinciding with colder months, positivity increased again in the most recent waves to a similar level seen in at the start.

4.2.3 Similar to walking, there was a slight decrease in positivity towards cycling during Wave 6 (35%) as the weather turned colder, compared to previous waves and later where positivity was relatively consistent at around four in ten. Like other modes, there appears to be a slight increase in positivity towards cycling in the most recent wave.

4.2.4 There has been some variation in positivity towards travelling by train. For the first four waves, around a fifth (21%-23%) felt positively towards this way of travelling. Positivity however decreased to a low of 16% during Wave 5, which coincided with October 2020 half-term. Positivity was however on the increase for the four most recent waves (25%-28%).

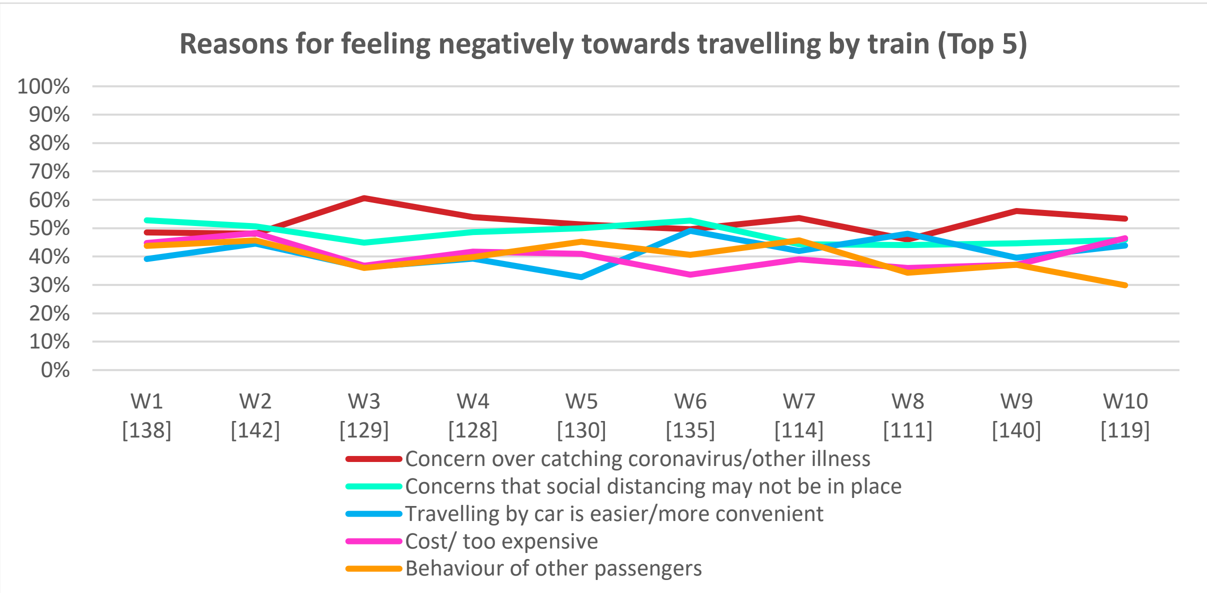
4.2.5 Positivity towards travelling by bus followed a similar pattern to travelling by train. Around a fifth or less felt positively towards travelling by bus for the first five waves (14%-20%), while this increased marginally to just under quarter for the later four waves (23%-24%).



Base: All respondents excluding those who answered 'Don't know' (varies by wave: 251-340)

Figure 12. **Positivity towards different ways of travelling**

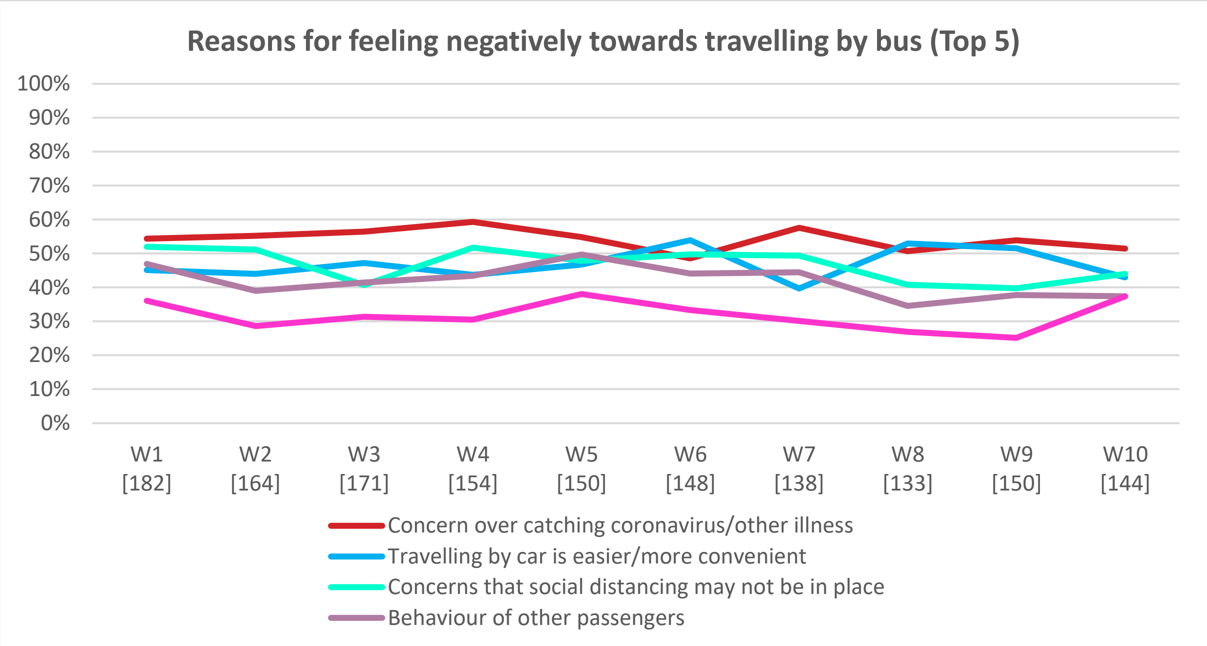
4.2.6 Figure 13 shows the most common reasons for feeling negatively towards travelling by train across the ten waves. For the majority of waves, the most common reasons were related to Covid-19 concerns, including concern about catching Covid-19 itself (which peaked in Wave 3), and passengers not following Covid-19 guidelines of social distancing, with around half citing these reasons. Notably, however, non-Covid-19 related concerns consistently were also cited across the waves with almost the same frequency, including simply that travelling by car is more convenient, and the cost of rail travel.



Base: Respondents who reported feeling negatively towards travelling by train (varies by wave: 111-142)

Figure 13. **Reasons for feeling negatively towards travelling by train (Top 5)**

4.2.7 Reasons attributed for feeling negatively towards travelling by bus were similar to those of travelling by train, as shown in Figure 14. Notably, a slightly higher proportion of respondents cited concerns over catching Covid-19. Interestingly, a higher proportion of respondents also cited lack of cleanliness on board as a reason for feeling negatively towards travelling by bus, and this may have been related to concerns about Covid-19.

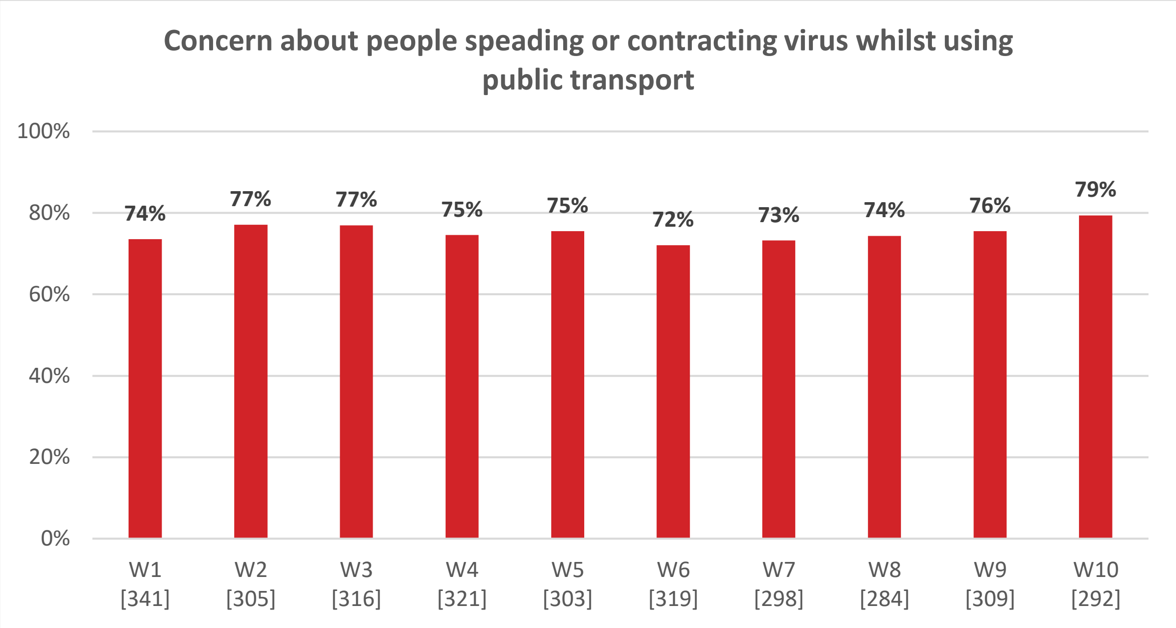


Base: Respondents who reported feeling negatively towards travelling by bus (varies by wave:133-182)

Figure 14. **Reasons for feeling negatively towards travelling by bus (Top 5)**

4.3 Current Safety Concerns and Measures

4.3.1 Figure 15 shows levels of concern over people spreading or contracting the virus whilst using public transport over the ten survey waves. In each wave, at least seven in ten respondents reported that they strongly or somewhat agreed that they were concerned about people contracting or spreading the Covid-19 virus whilst using public transport. While the proportion of people who expressed this concern remained consistent for the most part, level of concern briefly decreased a little during the autumn months of Wave 6 and Wave 7 (72%-73%), but has increased a little again over the latest two waves (76-79%).

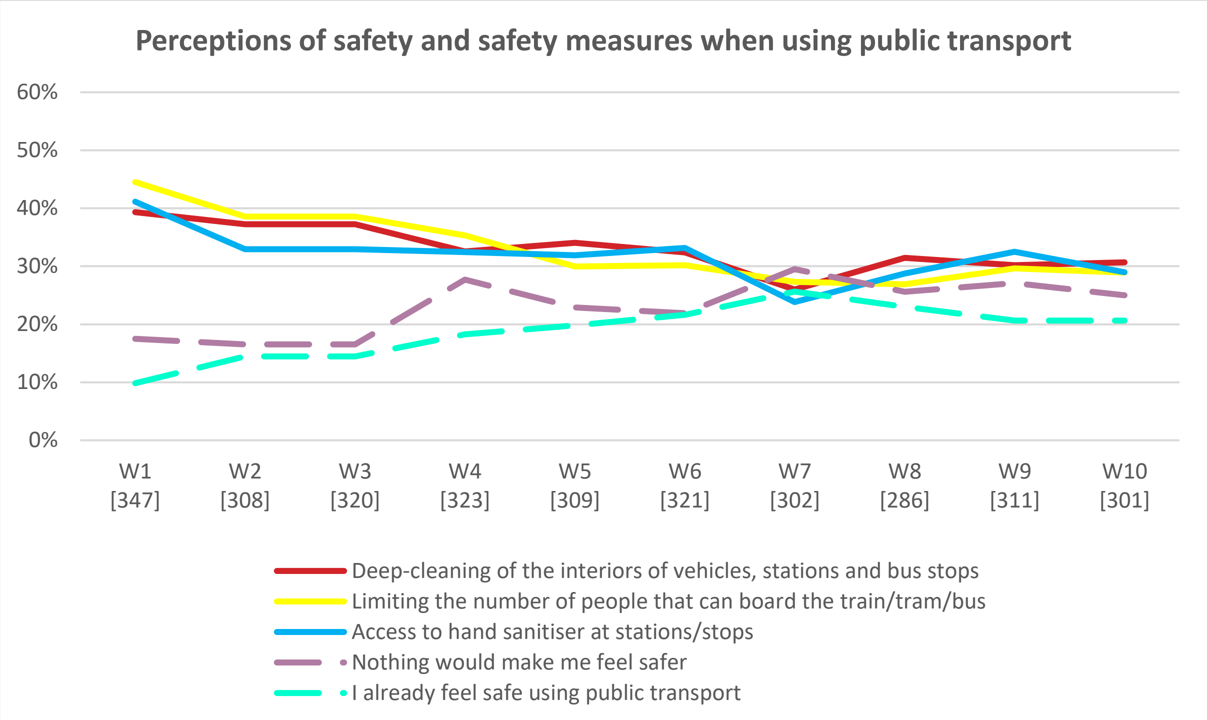


Base: All respondents excluding those who answered 'Don't know' (varies by wave: 284-341)

Figure 15. **Concern about people spreading or contracting virus whilst using public transport**

4.3.2 All respondents were asked what would make them feel safer using public transport over the next month or so. The findings are provided in Figure 16. Consistently, the most common suggestions were deep-cleaning the interiors of vehicles, stations and stops (26%-39%); limiting the number of people that can board the train, tram or bus (27%-45%); and access to the hand santiser at stations and stops (24%-41%). Notably, the proportion of respondents who suggested that these measures would make feel safer steadily decreased over time.

4.3.3 Correspondingly, the proportion of respondents who said that nothing would make them feel safer (17%-30%), and who said that they already felt safe using public transport (10%-26%), has steadily increased over time.



Base: All respondents (varies by wave: 286-347)

Figure 16. **Perceptions of safety and safety measures when using public transport**

5. OTHER CURRENT AND ANTICIPATED CHANGES IN BEHAVIOUR

5.1 Introduction

5.1.1 This chapter explores respondents' changes in walking and cycling habits for leisure, and to replace other journeys, since the Covid-19 restrictions. It also examines anticipated behaviour in relation to travelling further afield for leisure in the near future.

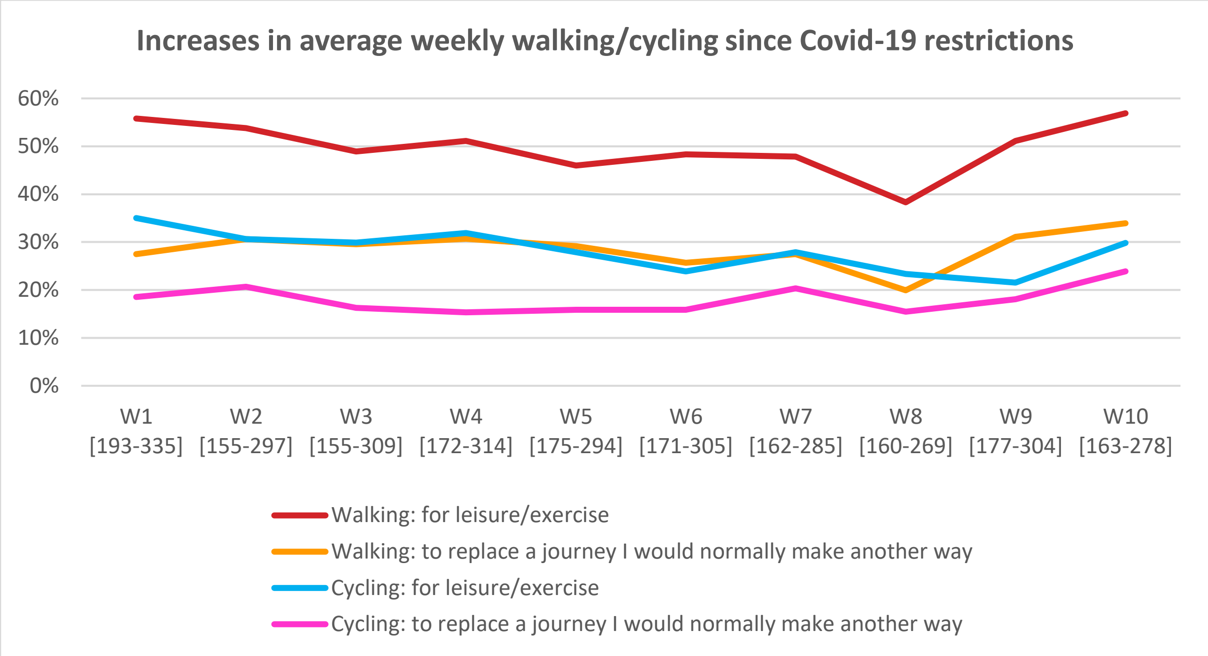
5.2 Changes to walking and cycling

5.2.1 Respondents were asked about changes in their frequency of walking and cycling for leisure/exercise, and to replace journeys they would normally make another way. Changes in all these behaviours remained reasonably consistent over the ten survey waves.

5.2.2 Of respondents who undertook walking for leisure/exercise, around half reported an increase in the average amount they spent doing so per week since the Covid-19 restrictions, for almost all waves. While there was a slight decrease in Wave 8 (38%), this increased again during the festive period, and continued into the New Year, with 51% in Wave 9 and 57% in Wave 10 reporting an increase in their walking for leisure/exercise reasons.

5.2.3 Of those who undertook cycling for leisure/exercise, around a third reported an increase in the average amount of time they spent doing so per week since the Covid-19 restrictions, from Wave 1 to Wave 4 (30%-35%). The proportion of respondents who reported this increase was not as high from Wave 5 to Wave 9 (22%-28%), however increases did pick back up in the most recent Wave 10 (30%).

5.2.4 The proportion of respondents who reported an increase in walking to replace another journey normally made another way, followed a similar pattern, with fluctuations of between a third and fifth of respondents reporting an increase since Covid-19 restrictions. Around a sixth of respondents consistently reported an increase in cycling to replace a journey normally made another way, since Covid-19 restrictions. These proportions have both increased slightly in the last two waves.



Base: Respondents who walked and cycled pre-Covid restrictions for the specified reasons (varies by wave: 155-335)

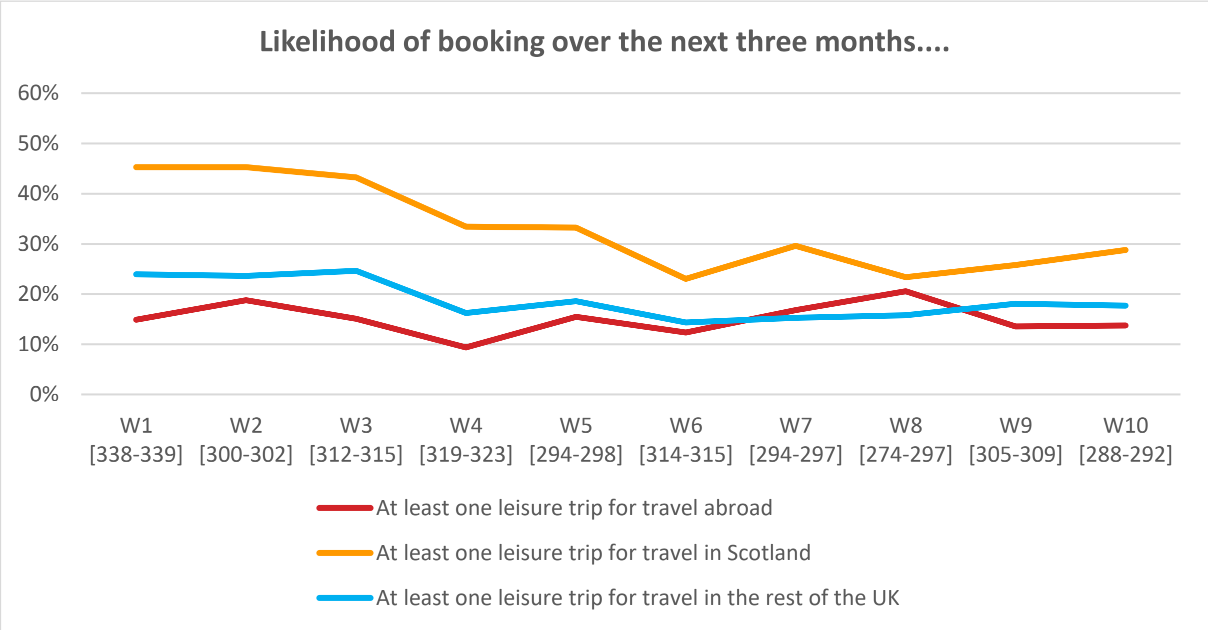
Figure 17. **Increases in average weekly walking/cycling since Covid-19 restrictions**

5.3 Travelling further afield and future travel

5.3.1 All respondents were asked about the likelihood of them booking a leisure trip over the next three months. Consistently, respondents reported that it was more likely that they would book a leisure trip for travel in Scotland, compared to booking a leisure trip abroad or in the rest of the UK.

5.3.2 Almost half of respondents reported that they would book a leisure trip in Scotland during Wave 1 to Wave 3 (43%-45%). Likeliness however continued to decrease over subsequent waves, with a slight increase in the latter two waves (26-29%).

5.3.3 Similarly, the reported likeness of booking at least one leisure trip for travel in the rest of the UK or abroad was higher in the first three waves (24%-25% and 15%-19% respectively), and remained steadily low for the remaining waves.



Base: All respondents excluding those who answered 'Don't know' (varies by wave: 274-339)

Figure 18. **Likelihood of booking a trip over the next three months**

6. COMMUTE AND BUSINESS TRIPS

6.1 Introduction

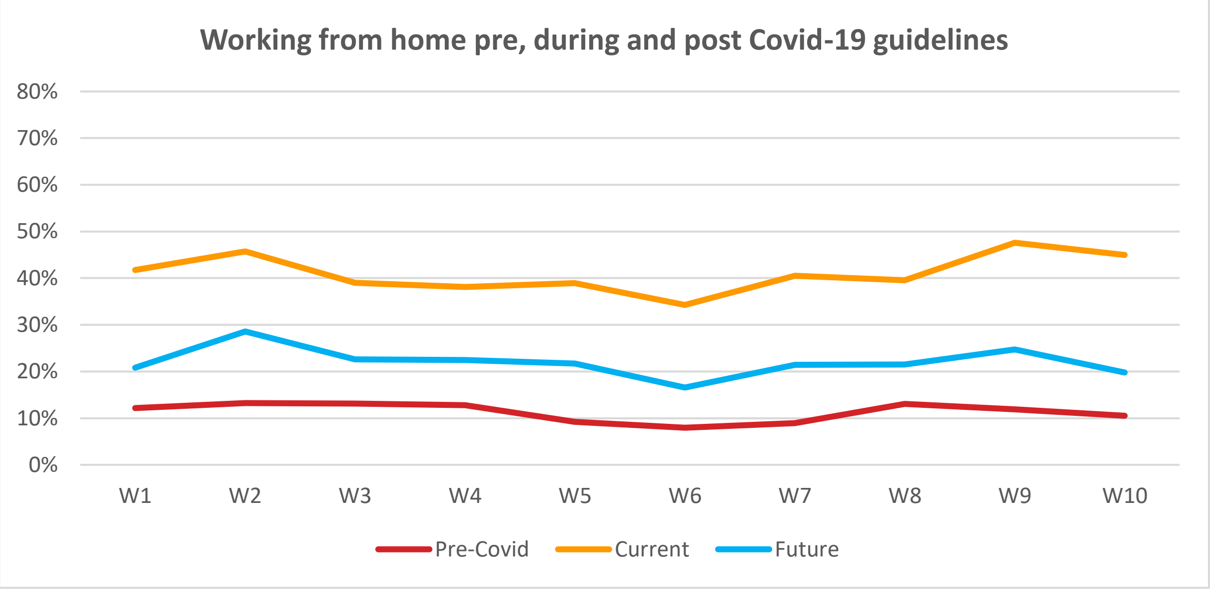
6.1.1 This chapter explores working respondents' changes in commuting and working patterns from before Covid-19 restrictions, and what commuting behaviour may look like in the future. It also examines anticipated changes in business trips.

6.2 Commuting Trips

6.2.1 Respondents who reported that they were working either full-time (i.e. five days a week or more) or part time before Covid-19 (on average 64%), were asked about their working patterns.

6.2.2 Specifically, respondents were asked how their working location was divided between their home and office/other location before Covid-19 guidelines, their current location, and how they anticipate working in the future, after all Covid-19 restrictions lifted.

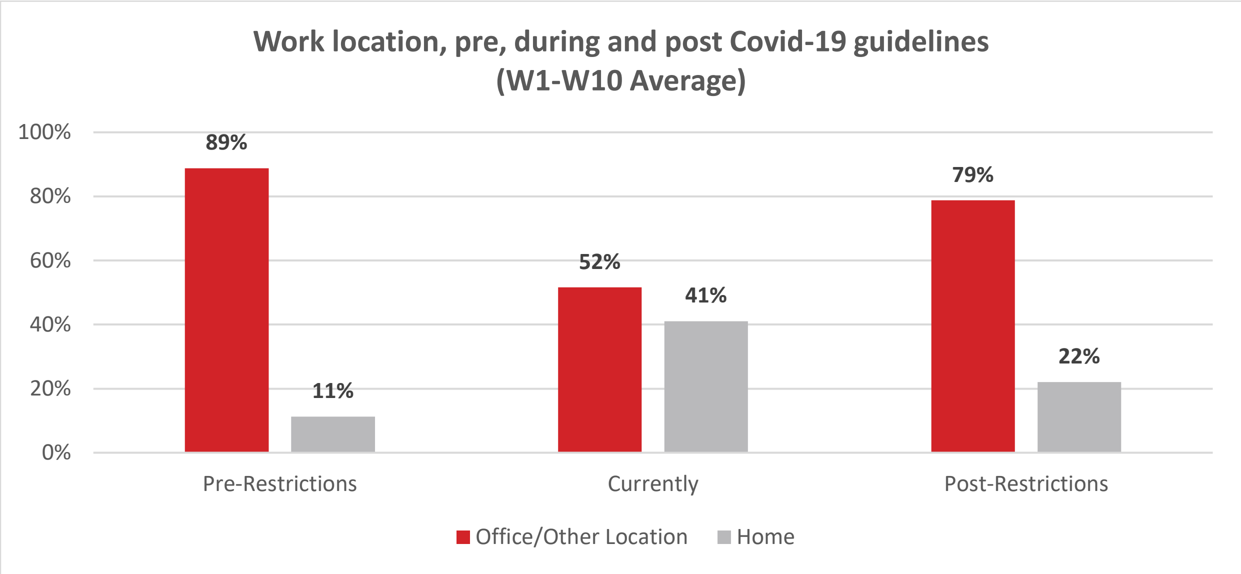
6.2.3 As shown in Figure 19, before Covid-19 restrictions, working respondents were working at home less than a sixth of their working days. Currently, respondents have been working at least a third (34%) of their working days at home, and as many as half of their working days (48%) during Wave 10, coinciding with stricter guidelines advising working from home as the default position where possible.



Base: Working respondents' average working days, (varies by wave: 183-225)

Figure 19. Working from home pre, during and post Covid-19 guidelines

6.2.4 As shown in Figure 20, on average, before the Coid-19 restrictions, 11% of working respondent's work days were undertaken at home. Double the number of working days (22%) were anticipated to be from home after all Covid-19 restrictions are lifted. This is equivalent to an average reduction in commuting journeys of 11%.



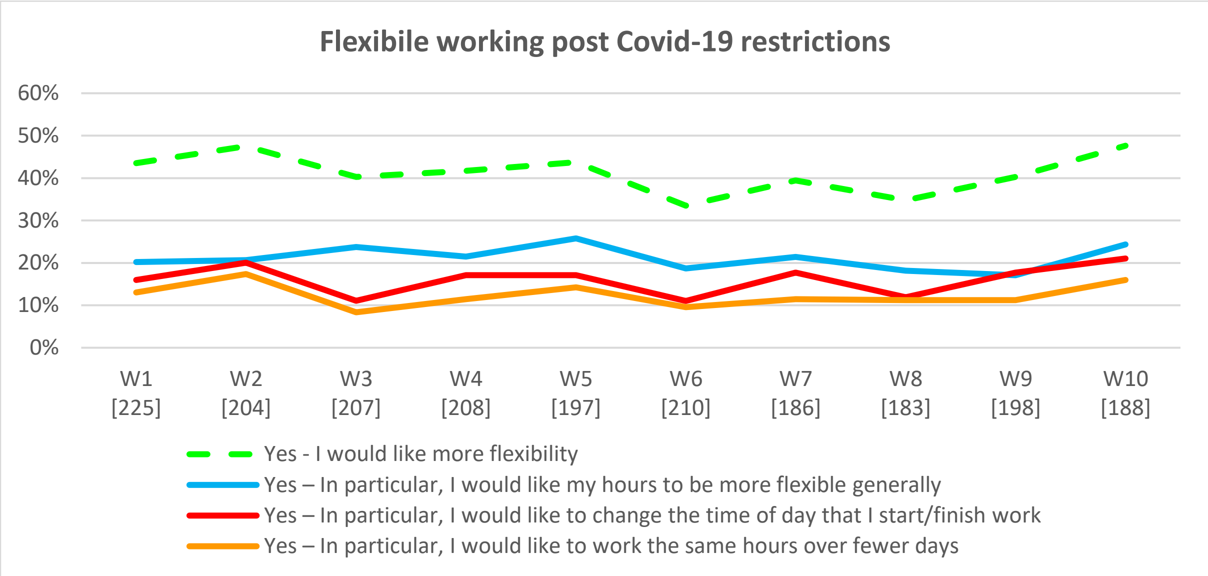
Base: Working respondents (varies by wave: 183-225)

Figure 20. **Work location, pre, during and post Covid-19 guidelines (W1-W10 Average)**

6.3 Flexible working

6.3.1 Across the ten waves, on average, over two fifths of respondents (41%) said they would like to work more flexibly, with the proportion increasing in Waves 9 (40%) and 10 (48%). More specifically, of working respondents:

- Around a fifth (17%-26%) reported that they would like their hours to be generally more flexible;
- Around a sixth (11%-21%) reported that they would like to change the time of day they start or finish work;
- Around a sixth (11%-17%) reported that they would like to work the same hours over fewer days.



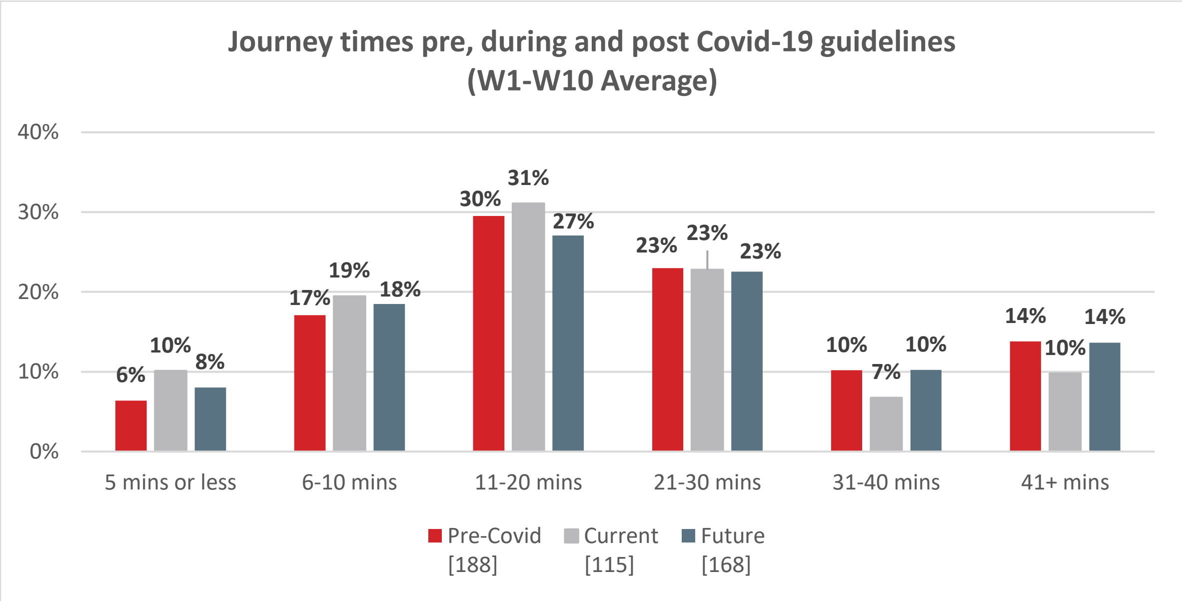
Base: Working respondents (varies by wave: 183-225)

Figure 21. **Flexibile working post Covid-19 restrictions**

6.4 Journey Time and Mode

6.4.1 Typical journey times for current commutes (for those who were still commuting during the waves), does not vary much from journey times before Covid-19 restrictions, or expected journey times once restrictions are lifted.

6.4.2 While there is very little difference between average journey times before Covid-19 restrictions and once all restriction are lifted, on average, fewer respondents reported making longer commutes (31 minutes or more) compared to pre and post Covid-19 guidelines.

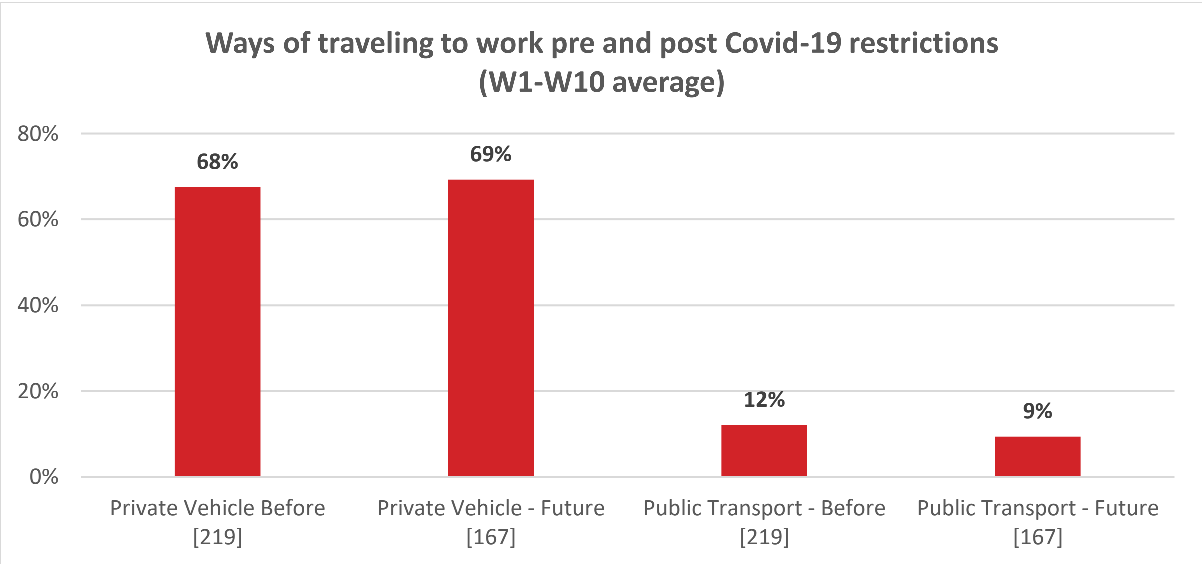


Base: Working respondents, (varies by wave: 115-188)

Figure 22. **Journey times pre, during and post Covid-19 guidelines (W1-W10 Average)**

6.4.3 On average, respondents expect to travel to work by car or van as either a passenger or driver, or by motorbike, as their main way of travelling, similar amounts once restrictions are lifted (69%), as before restrictions were in place (68%).

6.4.4 On average, respondents anticipate using public transport (a train or a bus), slightly less as their main way of travelling post restrictions for their commute (9%), compared to before restrictions were in place (12%).



Base: Working respondents, (varies by wave: 167-219)

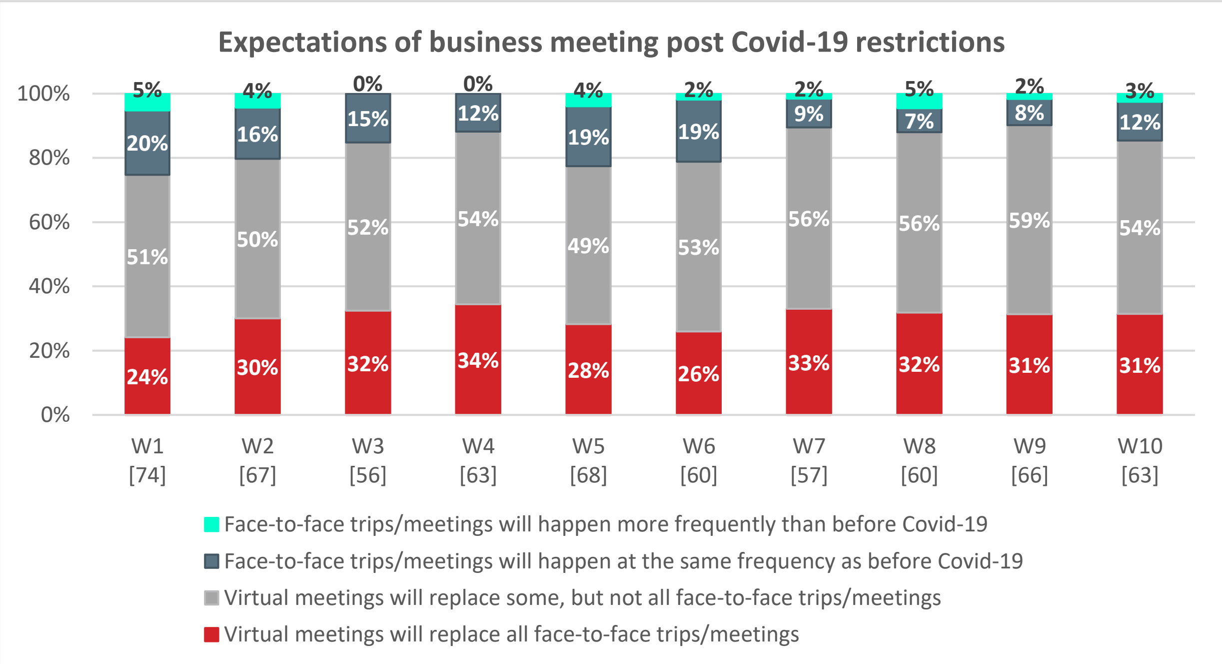
Figure 23. **Ways of traveling to work pre and post Covid-19 restrictions (W1-W10 average)**

6.5 Business Trips

6.5.1 Before Covid-19 restrictions, on average, around a third (32%) of working respondents took part in business meetings.

6.5.2 Across all ten waves, at least three quarters (75%) anticipated that virtual meetings will replace some, or all, face to face business meetings once all restrictions have been lifted. As many as nine in ten (90%) anticipated this would be the case during Wave 9, with the figure generally increasing across the ten waves.

6.5.3 Notably, the proportion of respondents who thought that business meetings will happen at the same frequency as before Covid-19, was generally higher during the first six waves (12%-20%), compared to during the last four waves (7%-12%).



Base: Working respondents who took part in business meetings, excluding those who answered 'Don't know' (varies by wave: 56-74)

Figure 24. **Expectations of business meeting post Covid-19 restrictions**

7. SUMMARY OF KEY FINDINGS

7.1 Introduction

7.1.1 In March 2020 travel restrictions were introduced in Scotland as a result of the Covid-19 pandemic. To understand changes to travel attitudes and behaviour in the north east of Scotland during the restrictions, Nestrans, in partnership with Aberdeen City and Aberdeenshire Council, and with support from Paths for All, commissioned monthly travel behaviour and attitude surveys.

7.1.2 The first survey wave was undertaken in July 2020 and the last was undertaken in February 2021, therefore the research does not show changes from 'pre-Covid' travel behaviour, nor does it reflect change 'post-Covid', as travel restrictions were still in place during the last survey wave.

7.1.3 Due to the progression of Covid-19 across the timeframe of the surveys, results show how the population has reacted to the different elements of lockdown, rather than the progressive recovery, as had been anticipated at the point at which the study was commissioned.

7.2 Key findings

7.2.1 Whilst the frequency of journeys made remained broadly consistent across the ten waves, the largest changes coincided with increased Covid-19 cases and stricter guidelines being introduced across Scotland, which is likely to have been the cause of fewer journeys than in the summer and autumn months.

7.2.2 Shopping was the most consistently undertaken trip, with the majority of respondents making such trips between one and three times a week. In October and early November, the majority were making more than one weekly shopping trip, and this reduced significantly when restrictions tightened, around Christmas and into the new year.

7.2.3 Journeys to work have varied somewhat across the waves. From September onwards the frequency of commutes increased, possibly reflecting attempts to return to more normal working patterns. However this journey type then reduced from the Christmas period, through to the tighter Covid-19 restrictions in the new year.

7.2.4 Travelling by car was consistently the most frequently used main way of travelling for all journey purposes, with the exception of outdoor leisure activities. Consistently, across all waves, the main way of travelling to outdoor leisure activities was walking, with the gap between walking and driving varying across waves, depending on the time of year.

7.2.5 Around a fifth of respondents consistently reported that they were more likely to use a car to get around now, compared to before Covid-19 restrictions were introduced, with the proportion rising towards the end of the survey waves. However, similar proportions also reported that they there were more likely to cycle for leisure now, compared to before Covid-19, with this proportion slightly lower during the waves which coincided with autumn/winter months.

7.2.6 Positivity towards different ways of travelling remained relatively consistent across the ten survey waves. Positivity towards walking remained high, with slight dips coinciding with colder weather; this pattern was also seen for cycling. Positivity towards travelling by bus or train has remained low, as would be expected during the travel restriction guidance, but has increased slightly over time since October. There was concern expressed over catching Covid-19 itself and passengers not following Covid-19 guidelines of social distancing when travelling by public transport.

7.2.7 Of respondents who undertook walking for leisure/exercise, around half reported an increase in the average amount they spent doing so per week since the Covid-19 restrictions, for almost all waves. Of those who undertook cycling for leisure/exercise, around a third reported an increase in the average amount of time they spent doing so per week since the Covid-19 restrictions.

7.2.8 Before Covid-19 restrictions, working respondents were typically working at home very infrequently. This has increased considerably and remained high throughout the research period, with further increases coinciding with stricter guidelines advising working from home as the default position where possible.

7.2.9 In the future, respondents predict an average reduction in commuting journeys of around a tenth, compared to before the pandemic. Across the ten waves, two fifths of working respondents suggested that they would like to work more flexibly. Around three quarters of respondents who take part in business meetings predict that virtual meetings will replace some, or all, face to face business meeting once all restrictions have been lifted.

7.3 Going forwards

7.3.1 This study forms an important component, alongside other data sources, in understanding both changes in behaviour and attitudes during the pandemic. It is also a signpost towards what changes might remain into the future.

7.3.2 However, whilst Covid-19 travel restrictions continue to remain in place, and as they begin to reduce, it is essential to understand these changing behaviours and attitudes to successfully target guidance to promote active and sustainable modes, and to build a long-term regional transport strategy which suits current and anticipated future demand for travel.

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