North East Transport Behaviour and Attitude Surveys
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30/07/2021

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 11 REPORT (SURVEY UNDERTAKEN BETWEEN 10TH JUNE AND 23RD JUNE 2021)

Smarter Choices, Smarter Places
Supporting Sustainable Travel

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 11 REPORT (SURVEY UNDERTAKEN BETWEEN 10TH JUNE AND 23RD JUNE 2021)

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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, conducted ten monthly online travel behaviour and attitude surveys, between July 2020 and February 2021. The purpose of the research was to better understand changes occurring in the north east of Scotland during Covid-19 restrictions.

1.1.2 Nestrans have now commissioned an extension to the research, to help gain an understanding of continued changes during the ongoing pandemic and easing of Covid-19 restrictions. This involves six further online travel behaviour and attitude surveys (one every six to eight weeks), over nine months, between June 2021 and March 2022, bringing the total number of waves to 16. Each survey wave will primarily 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 11 of 16 Waves. The data was collected between 10th June and 23rd June 2021.

1.2.2 A total of 293 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 approximately evenly split between the two council areas; 51% of respondents were from Aberdeenshire and 49% 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 26th May to 3rd June 2021[1].

1.2.4 Any differences highlighted in the report between different locations are statistically significant.

1.2.5 Aberdeenshire and Aberdeen City were in Covid-19 protection Level 1 at the time of the survey, as was the majority of Scotland[2]. The Covid-19 guidelines for this protection level included[3]:

- Individuals were able to meet socially:
  - In groups of up to 6 people from 3 households in their home and were able to stay overnight (without the need to physically distance);
  - In groups of up to 8 people from 3 households in indoor public places;
  - In groups of up to 12 people from 12 households in outdoor spaces;

[1] https://www.transport.gov.scot/publication/covid-19-public-attitudes-survey-data-wave-18/
[2] https://www.gov.scot/publications/coronavirus-covid-19-protection-levels/
[3] https://www.gov.scot/publications/coronavirus-covid-19-protection-levels/pages/protection-level-1/

- Individuals were able to travel to areas of Scotland that were in Level 0, 1 or 2, but were unable to enter areas of Level 3 or 4,without a valid reason, such as work or education;
- Individuals were able to travel anywhere in England, Wales and Northern Ireland;
- Individuals were advised to work from home where possible, however trades people were able to carry out any work in homes, and informal childcare could take place;
- Everyone was encouraged to get tested;
- The majority of businesses and places could open under protection Level 1, including restaurants, pubs, retail, softplay and leisure and entertainment centres, with some exceptions including nightclubs;
- Restaurants, cafés, pubs and bars could open indoors until 23:00 and outdoors within local licensing conditions for the consumption of food and alcoholic drinks;
- Face coverings had to be worn in retail premises unless exempt;
- Individuals were able to form an extended household with another household of any size, if the individual was living alone, a single parent, or part of a couple who live apart;
- All holiday accommodation (hotels, B&Bs, self-catering, hostels, caravan and camping sites) could open in line with sector guidance for tourism and hospitality;
- All organised outdoor sports, personal training and coaching for adults was permitted, provided appropriate safety measures were followed. Indoor contact sports were not permitted, except for professional sport;
- Schools and childcare were open;
- Individuals were advised to reduce the need to travel where possible i.e. working from home, using local shops and services and to choose active travel where possible;
- Individuals were required to wear face coverings when travelling on public transport unless exempt;
- Individuals were advised not to share a vehicle with anyone from another household unless it was absolutely necessary.

2. JOURNEYS IN THE LAST SEVEN DAYS

2.1 Frequency of journeys

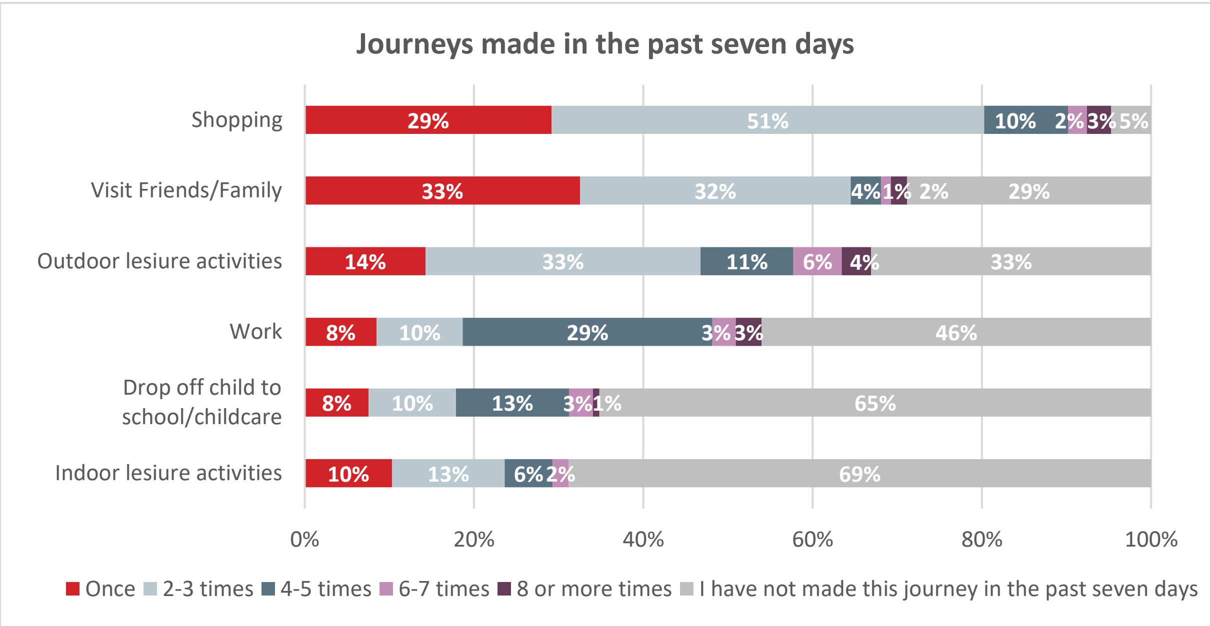
2.1.1 All respondents (100%) had made at least one journey in the last seven days, similar to the wider Scottish population (95%).

2.1.2 In the past seven days, the most frequently made trip was for shopping, with the vast majority of respondents (95%) having made this trip at least once, and four in five (80%) having made this trip between one and three times.

2.1.3 Around seven in ten respondents (71%) reported travelling to visit family and friends at least once in the last seven days. A similar proportion had made trips to outdoor leisure activities (67%), while around three in ten (31%) had travelled to indoor leisure activities.

2.1.4 Over half (54%) had travelled to work in the last seven days, higher than the wider Scottish population (33%). Around a third (35%) had dropped off their child to school, nursery or childcare at least once in the last seven days. Respondents from cities, large towns or suburbs were more likely than those from small towns, villages or rural areas to have made at least one trip in the last seven days to drop off a child to school or nursery or childcare (45% vs 22%).

2.1.5 For all journey purposes a higher proportion of respondents reported undertaking at least one journey in the last seven days in this wave, compared to Wave 10 and previous waves.



Base: All respondents [293]

Figure 1. In the past seven days, how many times have you left your home to go….

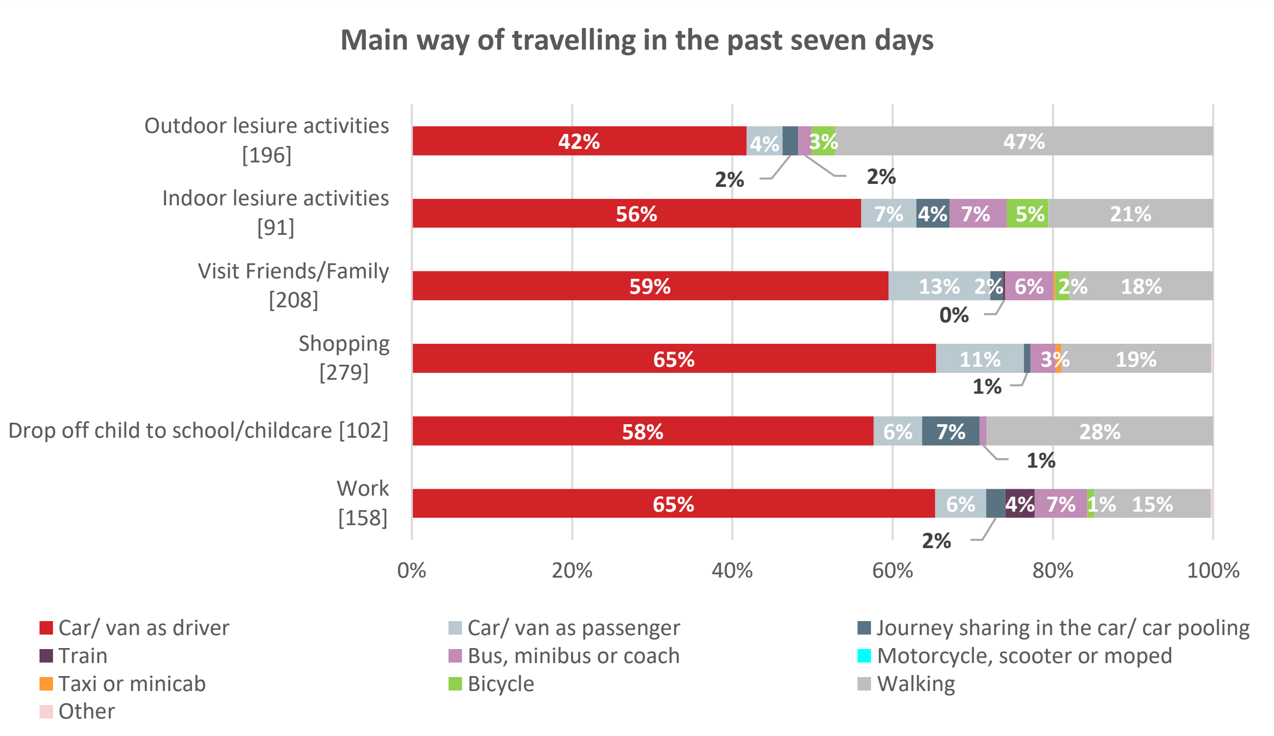
2.1.6 If the Covid-19 pandemic had never happened, respondents predicted that they would have made specific journeys more often in the past seven days. This includes:

- Around four in ten predicted that they would have visited friends and family (43%) and travelled to indoor leisure (40%) more often; and
- Over a quarter predicted that they would have undertaken outdoor leisure activities (28%), gone shopping (27%) and gone to work (26%) more often.

2.2 Ways of travelling

2.2.1 Similar to previous waves, travelling by car, as a driver or passenger or by carpooling/sharing, was most frequently cited as the main way of travelling, for all journey types, in the last seven days (48%-77%).

2.2.2 Almost half (47%) of respondents travelled by walking as their main way of travelling to undertake outdoor leisure activities, and over a quarter (28%) walked to drop off a child to school, nursery or childcare. Around a fifth walked to undertake indoor leisure activities (21%), go shopping (19%) and visit friends and family (18%).



Base: Respondents who had undertaken a journey in the last seven days [91-279]

Figure 2. In the past seven days, when undertaking trips for going to work, which way have you travelled most often?

2.2.3 Respondents who had made journeys for specific purposes in the last seven days, were asked what their main way of travelling would be for the same journey purpose in the longer term, for instance in a year's time. There was little difference between their current main way of travelling and anticipated main way of travelling in the future. The most notable differences were:

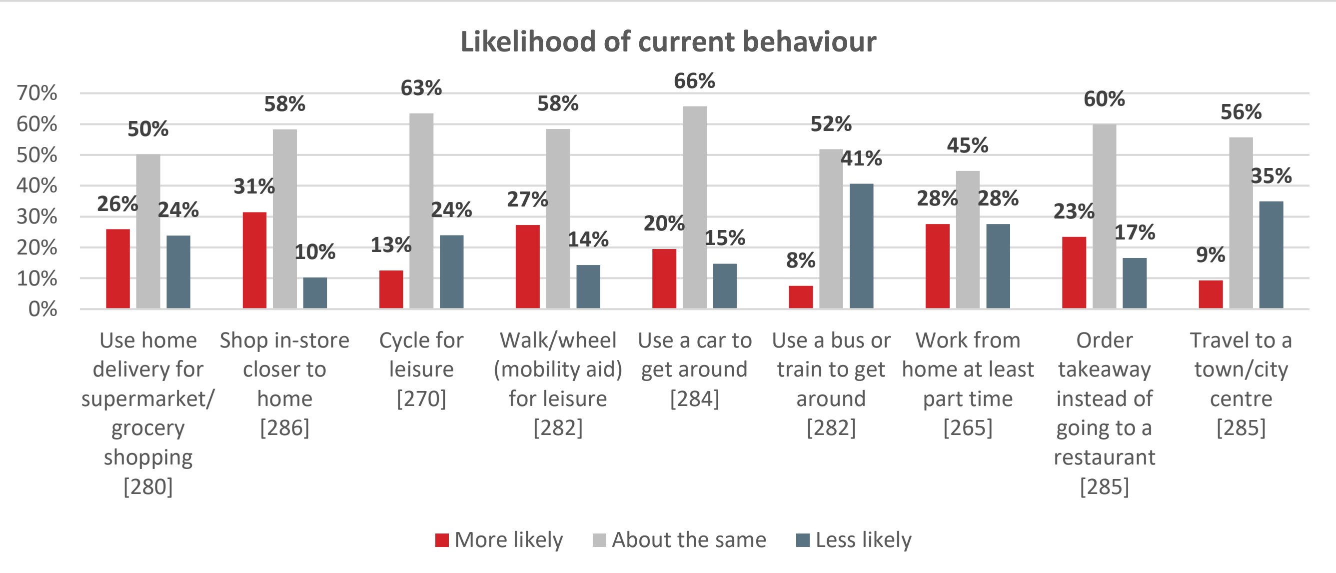
- 18% fewer anticipated walking to get to indoor leisure activities in the future compared to at present; and
- 14% more anticipated travelling by car pooling/sharing to get to indoor leisure activities in the future compared to at present.

2.3 Changes in current behaviour

2.3.1 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 quarter (26%) reported that they were more likely to use home delivery for supermarket shopping than before restrictions were put in place, while around three in ten (31%) reported that they were more likely to shop in-store closer to home. This is a decrease from previous waves.

2.3.2 Respondents also suggested that they were more likely to engage in physical activity for leisure purposes now, than before Covid-19 restrictions, including by walking (27%) and cycling (13%) for leisure, a decrease from previous waves.

2.3.3 Four in ten respondents (41%) reported that they were less likely to use a bus or train to get around now, than before Covid-19 travel restrictions were put in place, a smaller proportion compared to Wave 10 (61%).



Base: All respondents excluding those who answered 'Don't know' [265-286]

Figure 3. Currently, are you more likely, or less likely to do each of the following compared to before Covid-19 travel restrictions were put in place?

3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

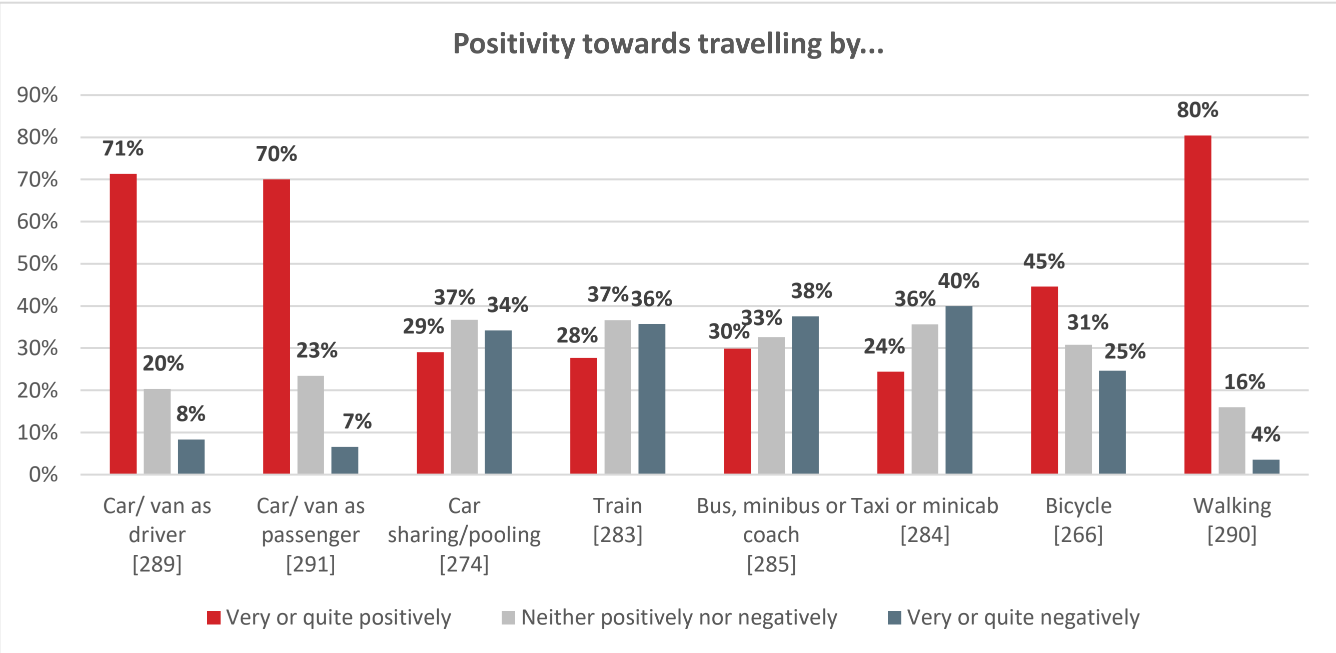
3.1 Positivity and negativity towards travelling by different methods

3.1.1 Around seven in ten respondents reported that they felt positively towards travelling by car or van as a driver (71%) or as a passenger (70%), while less than three in ten (29%) felt positively towards car sharing/pooling.

3.1.2 Eight in ten (80%) felt positively towards walking, while over two fifths (45%) felt positively towards travelling by bicycle.

3.1.3 Just over a third felt negatively towards travelling by bus, minibus or coach (38%), taxi or minicab (40%) and train (36%), which is somewhat less negative compared to previous waves. 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 have felt positively towards travelling by bus than those who had not reported using the bus or train (41% vs 21%).

3.1.4 Respondents from Aberdeen City were more likely than respondents from Aberdeenshire to have felt positively towards travelling by train (33% vs 23%). Those from cities, large towns or suburbs were more likely to have felt positively towards car sharing/pooling compared to those from small towns, villages or rural areas (33% vs 24%).



Base: All respondents excluding those who answered ‘Don’t know’ [266-291]

Figure 4. Currently, how positively or negatively do you feel about following ways of travelling?

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

- Cost/ too expensive (43%);
- Travelling by car is easier/more convenient (41%);
- Concern over catching coronavirus/other illness (35%);
- Behaviour of other passengers (33%); and
- Concern about overcrowding (33%).

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

- Travelling by car is easier/more convenient (46%);
- Concern over catching coronavirus/other illness (45%);
- Concern about overcrowding (40%);
- Concerns that social distancing may not be in place (40%); and
- Behaviour of other passengers (36%).

3.2 Current safety concerns and measures

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

- Public transport (68%);
- Taxis/minicabs (67%); and
- Shared transport methods, including car clubs or car sharing (67%).

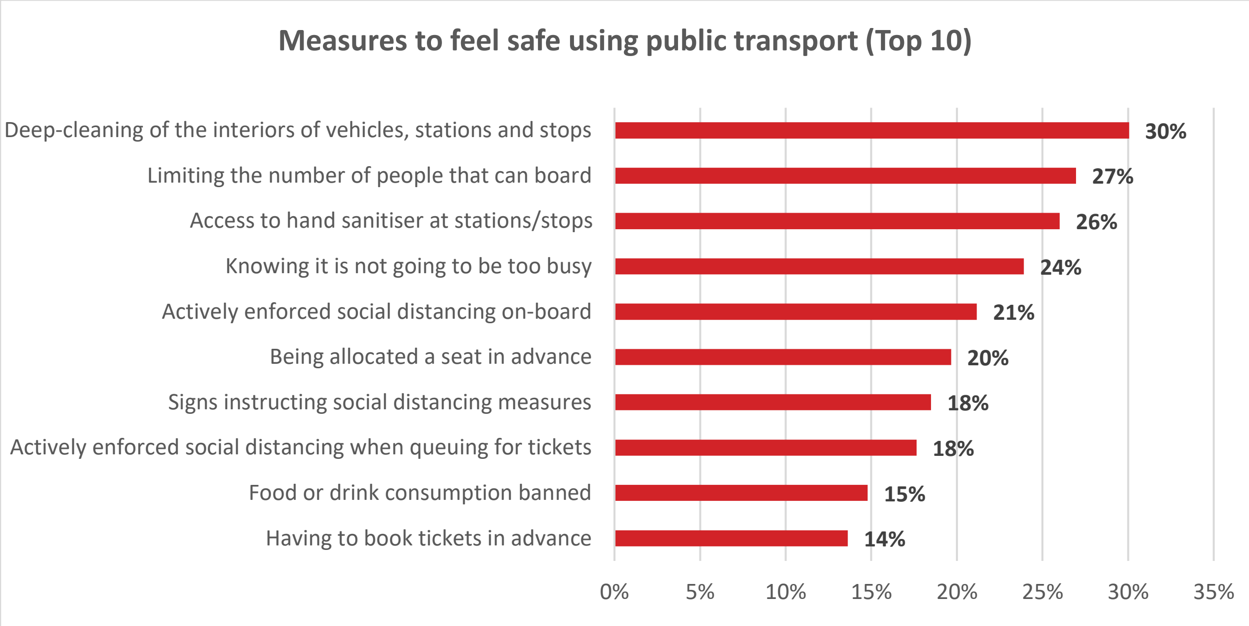
3.2.2 This is around 10% less than reported during the previous survey wave.

3.2.3 Similar proportions of the wider Scottish population felt concerned about travelling on public transport (71%), while less than half (47%) felt concerned about travelling by taxi or minicab.

3.2.4 Around seven in ten respondents agreed that the use of face coverings (71%) and social distancing (69%) makes them feel safer when using public transport. Over half (54%) were concerned that they will not be allowed to board a train by the time it reaches them as it will be full.

3.2.5 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 (30%);
- Limiting the number of people that can board the train/tram/bus (27%);
- Access to hand sanitizer at stations/stops (26%);
- Knowing it is not going to be too busy (24%); and
- Actively enforced social distancing on-board, through staff presence and CCTV (21%).



Base: All respondents [293]

Figure 5. Thinking about travelling over the next month or so, which of the following would make you feel safer to use public transport?

3.2.6 Around a quarter of respondents (27%) suggested that they already felt safe using public transport, while a fifth (20%) 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

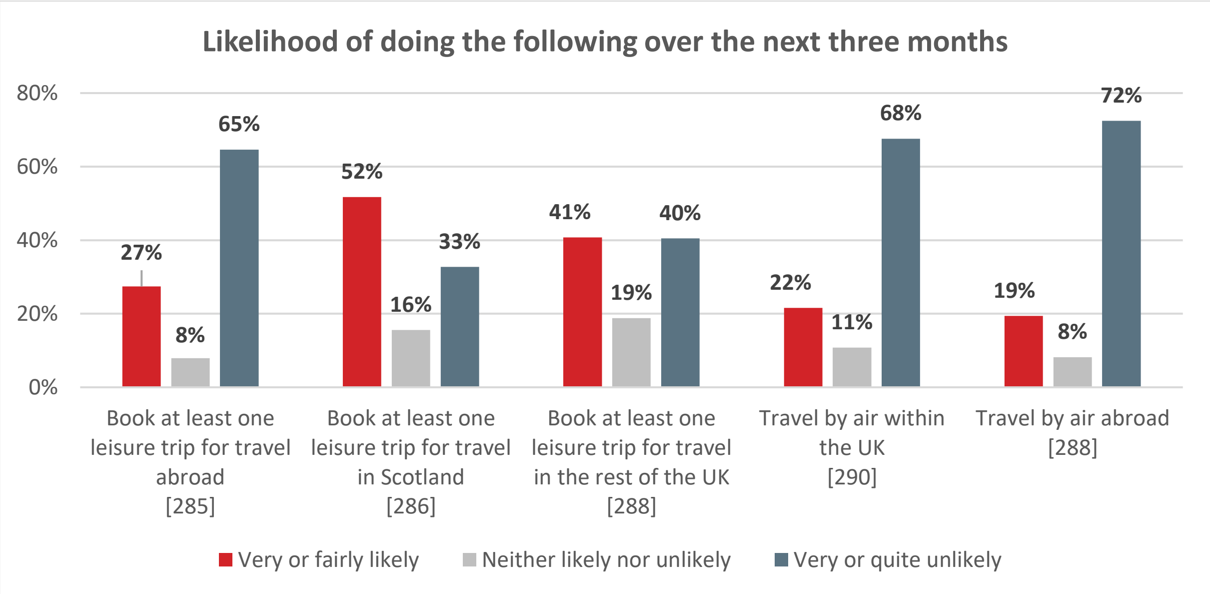
4.1.1 Since the Covid-19 restrictions, respondents reported an increase in their existing walking and cycling levels. The increase has primarily been for leisure/exercise purposes (48% and 27% respectively). Walking and cycling have also been used to replace some journeys that normally would have been made another way (23% and 20% respectively). This is an overall decrease from Wave 10 and previous waves.

4.1.2 The majority of these respondents expect that they will maintain these reported increased levels once Covid-19 restrictions are lifted, mainly for walking (84%) and cycling (87%) for leisure/exercise purposes.

4.2 Future travel and travelling further afield

4.2.1 The majority of respondents did not anticipate changes to how much they will travel in the next couple of weeks to drop off their child to school or nursery (86%), to go to work (83%), to go shopping (79%), to go to indoor leisure activities (74%), to go to outdoor leisure activities (74%), or to visit family and friends (68%). Notably, over a quarter (28%) anticipated an increase in visiting family and friends in the next two weeks.

4.2.2 Over half (52%) thought it likely that they would book a leisure trip for travel in Scotland in the next three months, around two fifths (41%) thought that they would book a trip in the rest of the UK, while over a quarter thought that they would book a trip abroad (27%).



Base: All respondents, excluding those who answered 'Don't know' [285-290]

Figure 6. How likely, or unlikely, are you to do the following, over the next three months?

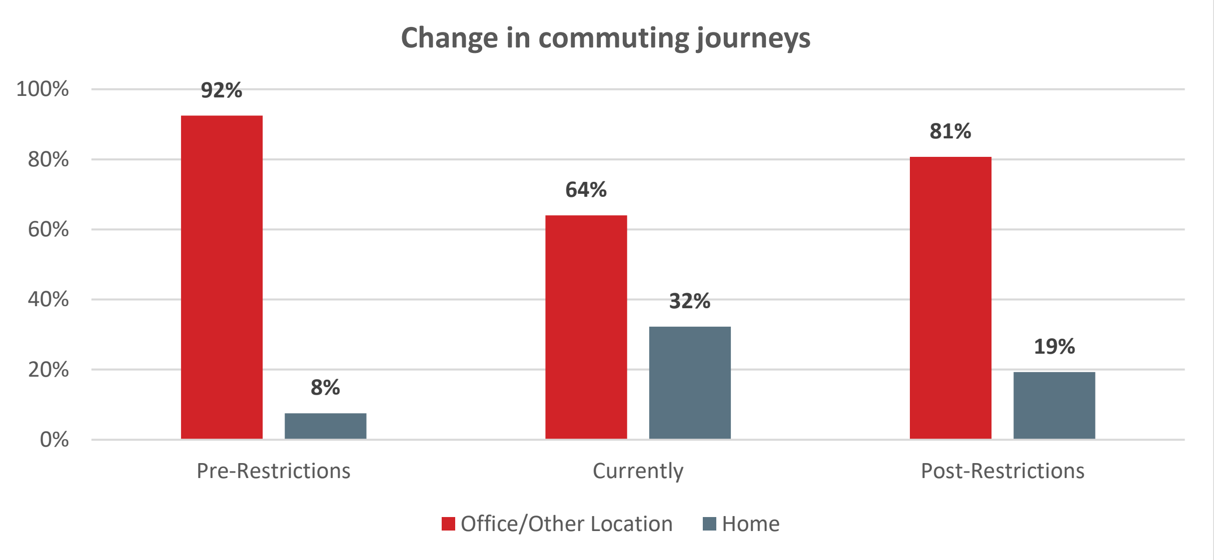
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting trips

5.1.1 Of the 72% respondents who reported that they were working before Covid-19 restrictions, around three quarters (76%) were working full-time (i.e. five days a week or more) and around a quarter (24%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) on 92% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 64% commuting of their working time, while 32% are working from home and 4% are furloughed.

5.1.3 Once all restrictions are lifted, on average, respondents predict making commuting journeys on 81% of their working days. This is equivalent to an average reduction in commuting journeys of 11%, from before Covid-19 restrictions.



Base: Working respondents [212]

Figure 7. Working location before Covid-19, currently, and predicted after Covid-19

5.1.4 When considering the longer term (such as a year from now), just under half of respondents (49%) would like to work more flexibly, with more flexible working hours (25%), changing start/finish times (25%), and/or working the same hours over fewer days (14%), compared to before Covid-19.

5.1.5 Four in ten respondents (40%) suggested that it was very or quite likely that their employer would allow them to change their working times, the same amount (40%) suggested it was very or quite unlikely, and a fifth (20%) did not know how likely it was.

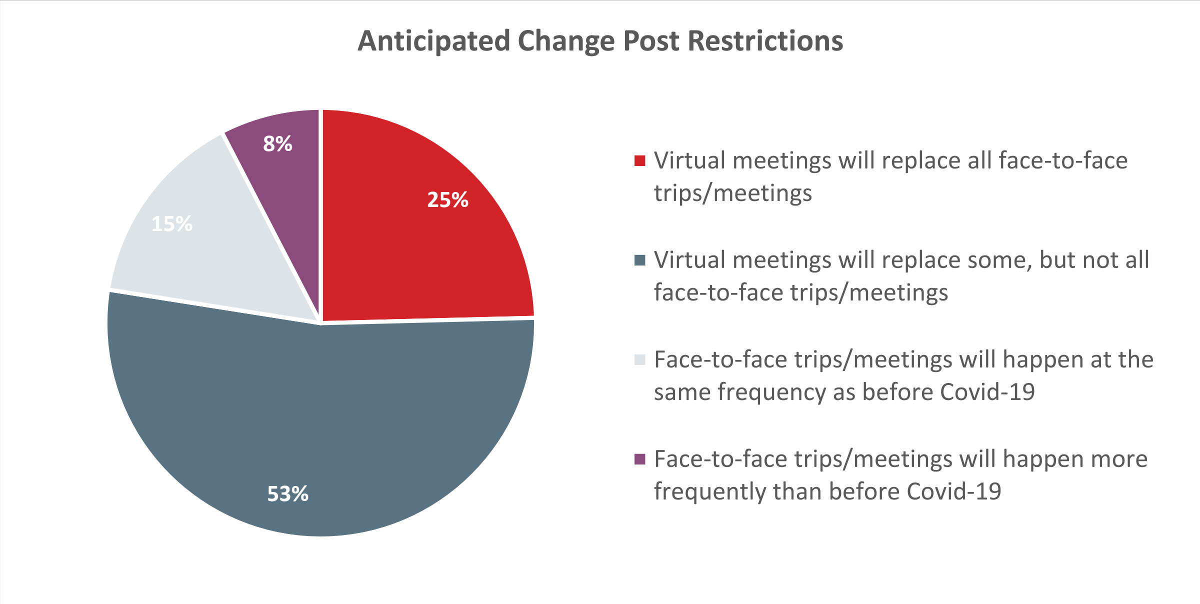
5.2 Commuting mode

5.2.1 Respondents expect to travel to work by car or van as either a passenger or driver, by motorbike or by car sharing/pooling, similar amounts once restrictions are lifted (72%), as to before restrictions were in place (71%). Respondents anticipate using public transport, a train or a bus, slightly less post restrictions for their commute (8%), compared to before restrictions were in place (12%).

5.3 Business trips

5.3.1 Before Covid-19 restrictions, over four in ten (43%) of working respondents took part in business meetings, with the majority (61%) travelling to attend between one and four business meetings in an average month.

5.3.2 Over three quarters (77%) of working respondents who take part in business meetings expect that virtual meetings will replace some, or all, face to face business meetings in the longer term (such as a year from now).



Base: Working respondents who take part in business meetings, excluding those who answered 'Don't know' [80]

Figure 8. In the longer-term (such as a year from now), do you think there will be changes to how often you travel outside of your regular workplace to conduct business trips/meetings?

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