NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 12 REPORT (SURVEY UNDERTAKEN BETWEEN 23RD AUGUST AND 31ST AUGUST 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, 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 subsequently 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 12 of 16 Waves. The data was collected between 23rd August and 31st August 2021.

1.2.2 A total of 310 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; 45% of respondents were from Aberdeenshire and 55% were from Aberdeen City.

1.2.3 Comparisons which are made with the Scottish population as a whole, use data from Transport Scotland's Public Attitudes survey, for which fieldwork was undertaken between 18th August to 24th August 2021[1].

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

1.2.5 In August 2021, the Scottish government announced that Scotland would move beyond level 0, and the legal requirement for physical distancing and limits on gathering were removed, and all venues across Scotland could re-open on 9th August 2021[2].

1.2.6 The protective measures at the time of the survey included[3]:

- Encouragement for individuals to get the vaccine when offered continued;
- Individuals were told to wear face coverings where required;
- Individuals were encouraged to keep distance, and meet outside if possible or with the windows open if inside;
- Individuals were encouraged to work from home if possible, or to do a mixture of home and office working;

[1] https://www.transport.gov.scot/publication/covid-19-public-attitudes-survey-data-wave-20/
[2] https://www.gov.scot/news/scotland-to-move-beyond-level-0/
[3] https://www.gov.scot/publications/coronavirus-covid-19-staying-safe-and-protecting-others/

- Some boarder control remained, relating to international travel.

2. JOURNEYS IN THE LAST SEVEN DAYS

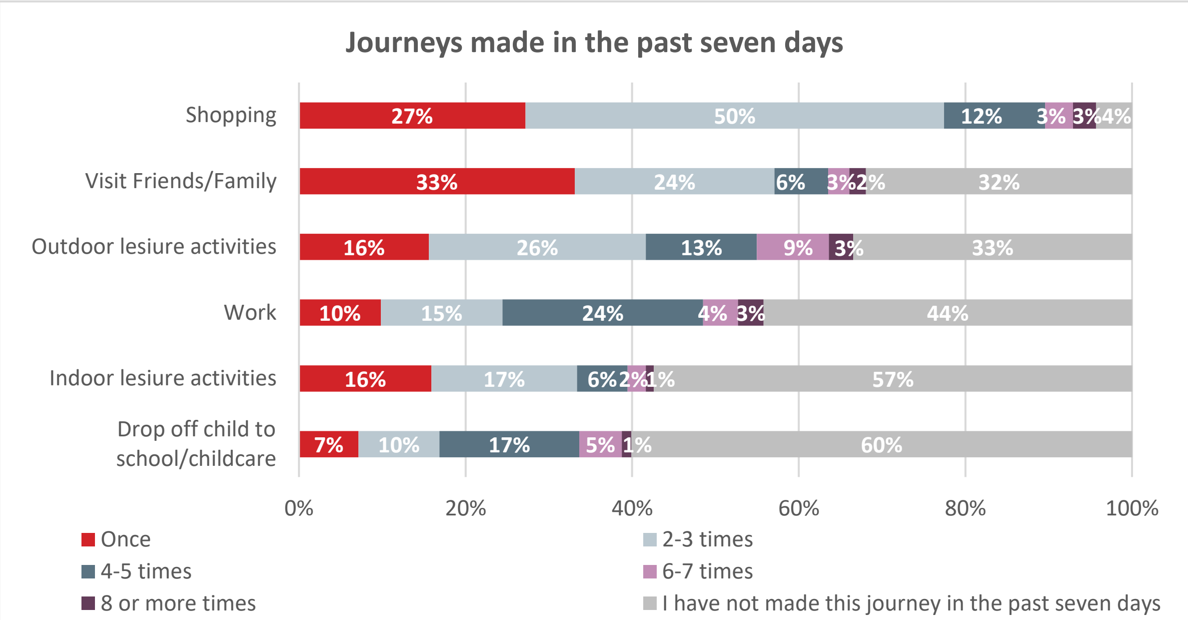
2.1 Frequency of journeys

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 (96%) having made this trip at least once, and over three quarters (77%) having made this trip between one and three times.

2.1.3 Around seven in ten respondents (68%) reported travelling to visit family and friends at least once in the last seven days and a similar proportion had made trips to outdoor leisure activities (67%). Around two fifths (43%) had travelled to indoor leisure activities. This is an increase from Wave 11 (31%), which is likely to be a reflection of the reduction in restrictions. Respondents from cities, large towns or suburban areas were more likely to have taken part in an indoor leisure activity in the last seven days compared to those from small towns, villages or rural areas (50% vs 32%).

2.1.4 Over half of respondents (56%) had travelled to work in the last seven days, higher than the wider Scottish population (31%). Respondents from cities, large towns or suburban areas were more likely than those from small towns, villages or rural areas to have travelled to work at least once in the last seven days (62% vs 46%). Four in ten (40%) had dropped off their child to school, nursery or childcare at least once in the last seven days.



Base: All respondents [310]

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

2.1.5 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:

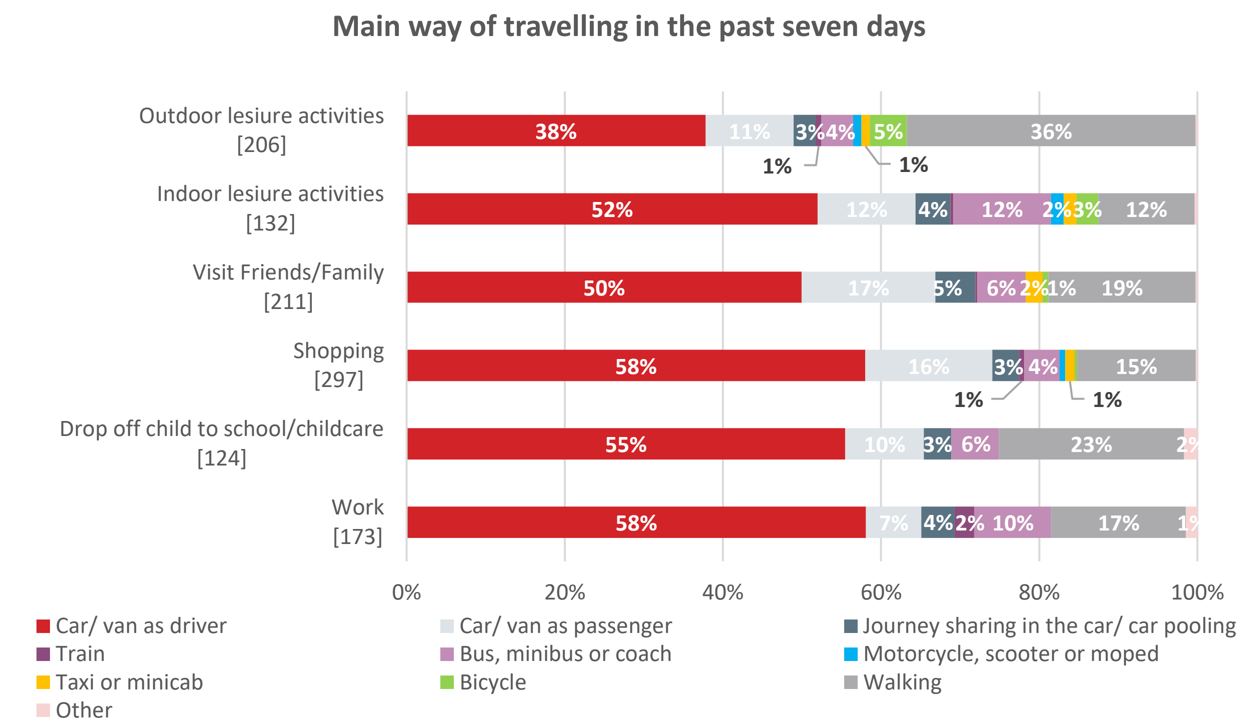
- Around four in ten predicted that they would have visited friends and family (43%) more often; and
- Around a third predicted that they would have undertaken indoor leisure activities (34%), outdoor leisure activities (32%), gone to work (31%) and gone shopping (30%) more often.

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 (52%-77%).

2.2.2 Respondents from cities, large towns or suburban areas were more likely to have travelled to work by train, bus or taxi, compared to those from small towns, villages or rural areas (17% vs 3%).

2.2.3 Over a third (36%) of respondents travelled by walking as their main way of travelling to undertake outdoor leisure activities. Just under a quarter (23%) walked to drop off a child at school, nursery or childcare, and around a fifth walked to visit friends and family (19%) and to work (17%).



Base: Respondents who had undertaken a journey in the last seven days [124-297]

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

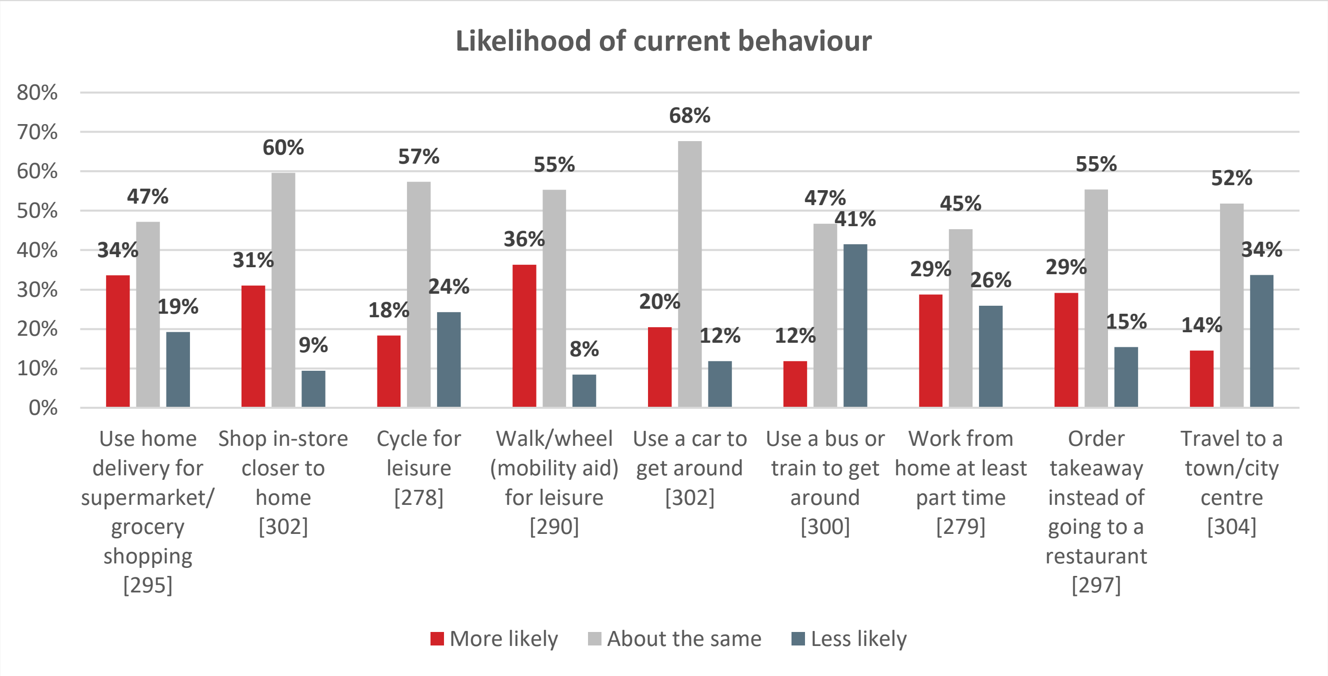
2.2.4 Respondents who had made journeys for specific purposes in the last seven days, were asked what their main way of travelling would be for the same journey purpose in the longer term, for instance in a year's time. There was little difference between their current main way of travelling and anticipated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

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 third (34%) 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 similar to Wave 11.

2.3.2 More people say they are likely to walk for leisure now compared to before the pandemic (36%) than say they are less likely to do so (8%), slightly higher than Wave 11 (36% compared to 27%). Similar to Wave 11, the opposite is true for cycling. More people say they are less likely to cycle for leisure now compared to before the pandemic (24%) than say they are more likely to do so (18%).

2.3.3 Around 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.



Base: All respondents excluding those who answered 'Don't know' [278-304]

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

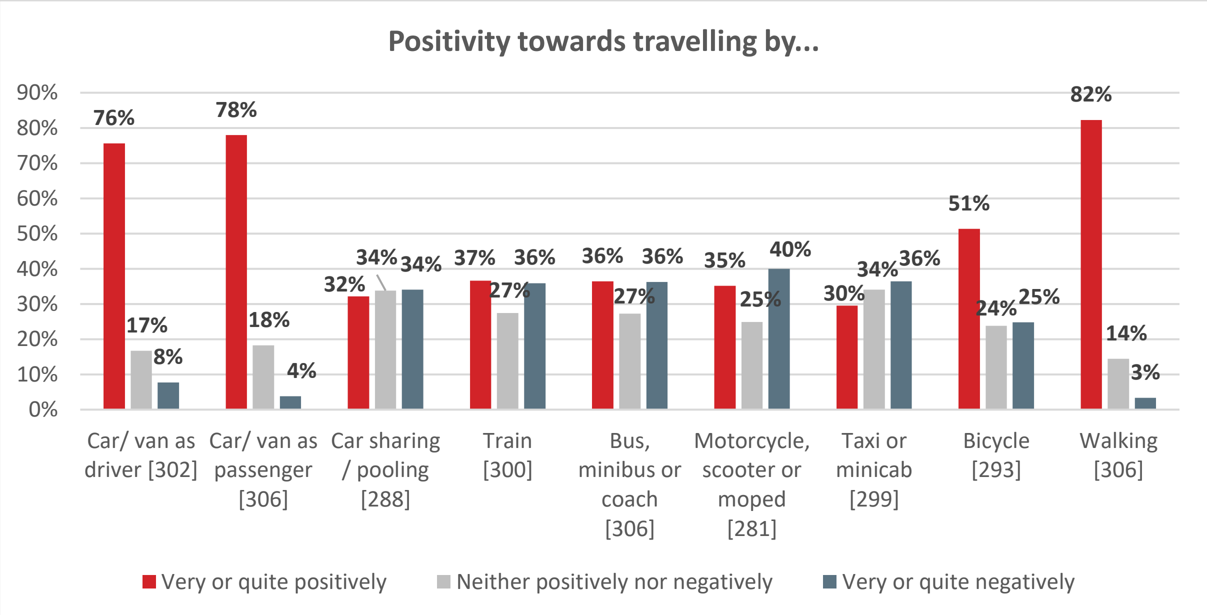
3.1 Positivity and negativity towards travelling by different methods

3.1.1 Over three quarters of respondents reported that they felt positively towards travelling by car or van as a driver (76%) or as a passenger (78%), while around a third (32%) felt positively towards car sharing/pooling.

3.1.2 Around eight in ten (82%) felt positively towards walking, while around half (51%) felt positively towards travelling by bicycle. Respondents from Aberdeen City were more likely to feel positively towards walking compared to respondents from Aberdeenshire (88% vs 75%).

3.1.3 Over a third (36%) felt negatively towards travelling by bus, minibus or coach, taxi or minicab and train, similar to Wave 11. 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 much more likely to have felt positively towards travelling by train (52% vs 21%) and by bus (59% vs 14%) than those who had not reported using the bus or train.

3.1.4 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 (39% vs 22%).



Base: All respondents excluding those who answered 'Don't know' [281-306]

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:

- Concern about overcrowding (56%);
- Cost/too expensive (50%);

- Concerns that social distancing may not be in place (46%);
- Concern over catching coronavirus/other illness (46%); and
- Behaviour of other passengers (43%).

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 (50%);
- Concerns that social distancing may not be in place (50%);
- Behaviour of other passengers (44%);
- Travelling by car is easier/more convenient (43%); and
- Lack of cleanliness on board (37%).

3.2 Current safety concerns and measures

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

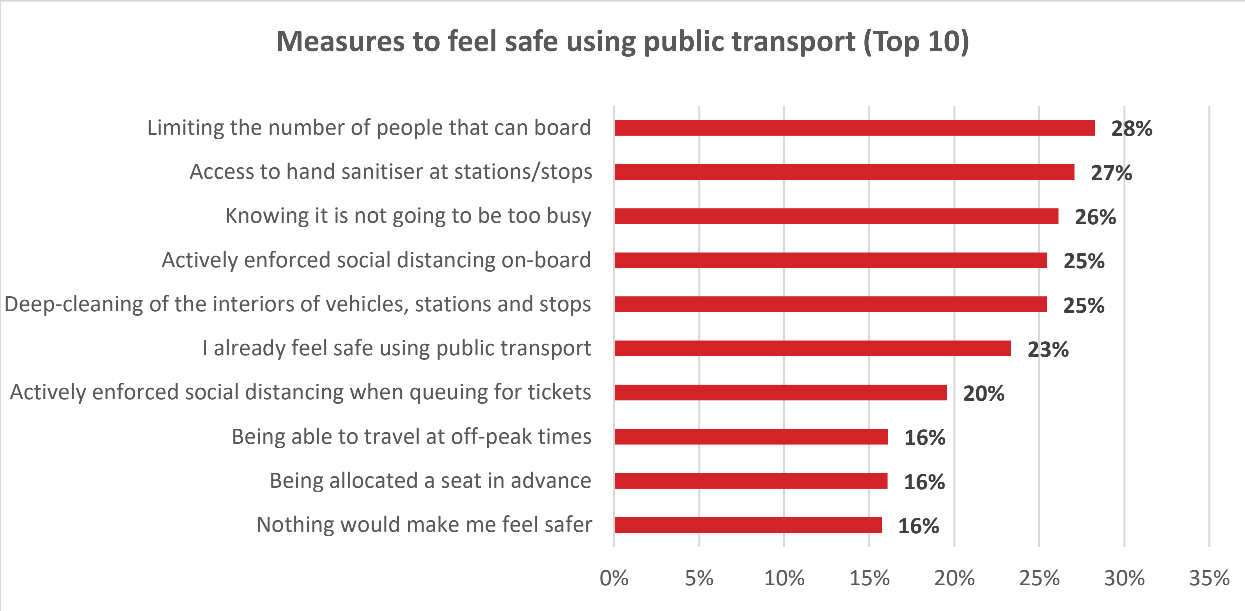
- Public transport (76%);
- Taxis/minicabs (73%); and
- Shared transport methods, including car clubs or car sharing (72%).

3.2.2 Notably smaller proportions of the wider Scottish population felt concerned about travelling on public transport (61%), while less than half (48%) felt concerned about travelling by taxi or minicab.

3.2.3 Around three quarters of respondents agreed that the use of face coverings (77%) and social distancing (75%) makes them feel safer when using public transport. Six in ten (60%) were concerned that they will not be allowed to board a train by the time it reaches them as it will be full.

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

- Limiting the number of people that can board the train/tram/bus (28%);
- Access to hand sanitizer at stations/stops (27%);
- Knowing it is not going to be too busy (26%);
- Actively enforced social distancing on-board, through staff presence and CCTV (25%); and
- Deep-cleaning of the interiors of vehicles, stations and bus stops (25%).



Base: All respondents [310]

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

3.2.5 Around a quarter of respondents (23%) suggested that they already felt safe using public transport, while around a sixth (16%) 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 (54% and 35% respectively). Walking and cycling have also been used to replace some journeys that normally would have been made another way (35% and 35% respectively).

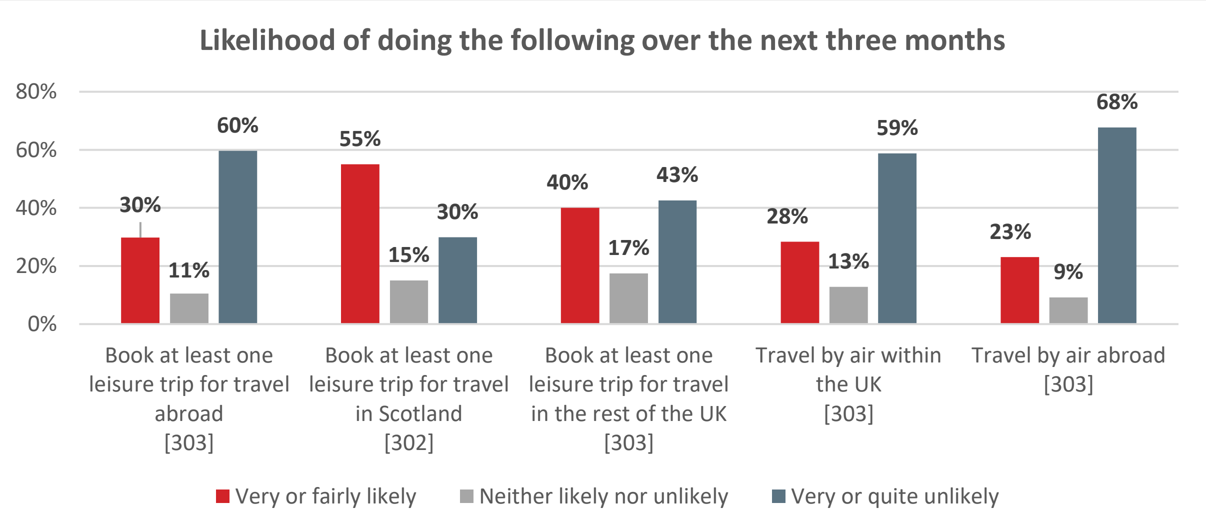
4.1.2 The majority of these respondents expect that they will maintain these reported increased levels once Covid-19 restrictions are lifted, mainly for walking (83%) and cycling (88%) for leisure/exercise purposes.

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 (79%), to go to work (77%), to go shopping (76%), to go to outdoor leisure activities (72%), to go to indoor leisure activities (70%), or to visit family and friends (68%). Notably, a quarter (24%) anticipated an increase in visiting family and friends in the next two weeks.

4.2.2 Over half (55%) thought it likely that they would book a leisure trip for travel in Scotland in the next three months, and two fifths (40%) thought that they would book a trip in the rest of the UK. Three in ten thought that they would book a trip abroad (30%). Respondents from cities, large towns or suburban areas were more likely to report that they would be likely to book a leisure trip abroad in the next three months compared to those from small towns, villages or rural areas (36% vs 20%).

4.2.3 These findings are similar to Wave 11.



Base: All respondents, excluding those who answered ‘Don’t know’ [302-303]

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

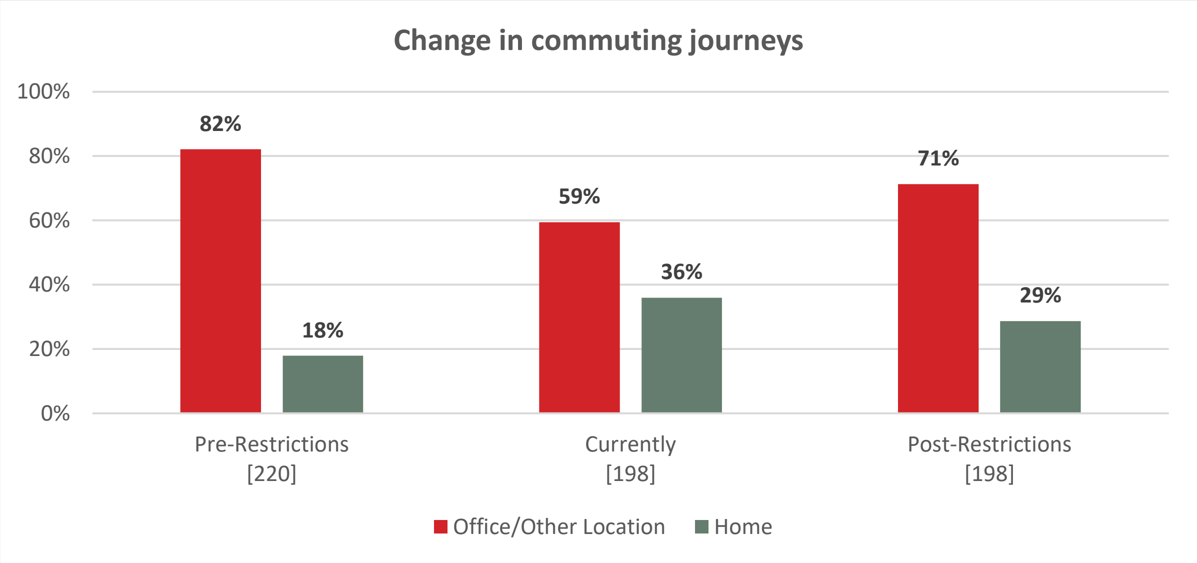
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting trips

5.1.1 Of the 71% respondents who reported that they were working before Covid-19 restrictions, around three quarters (77%) were working full-time (i.e. five days a week or more) and around a quarter (23%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) on 82% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 59% commuting of their working time, while 36% are working from home and 5% are furloughed.

5.1.3 Once all restrictions are lifted, on average, respondents predict making commuting journeys on 71% of their working days. This is equivalent to an average reduction in commuting journeys of 11%, from before Covid-19 restrictions.



Base: Working respondents [198-220]

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), over six in ten of working respondents (63%) would like to work more flexibly, with more flexible working hours (27%), changing start/finish times (33%), and/or working the same hours over fewer days (24%), compared to before Covid-19. This is an increase in those who would like to work more flexibly from Wave 11 (63% compared to 49%)

5.1.5 Around four in ten working respondents (44%) suggested that it was very or quite likely that their employer would allow them to change their working times, a similar amount (40%) suggested it was very or quite unlikely, and around a sixth (16%) did not know how likely it was.

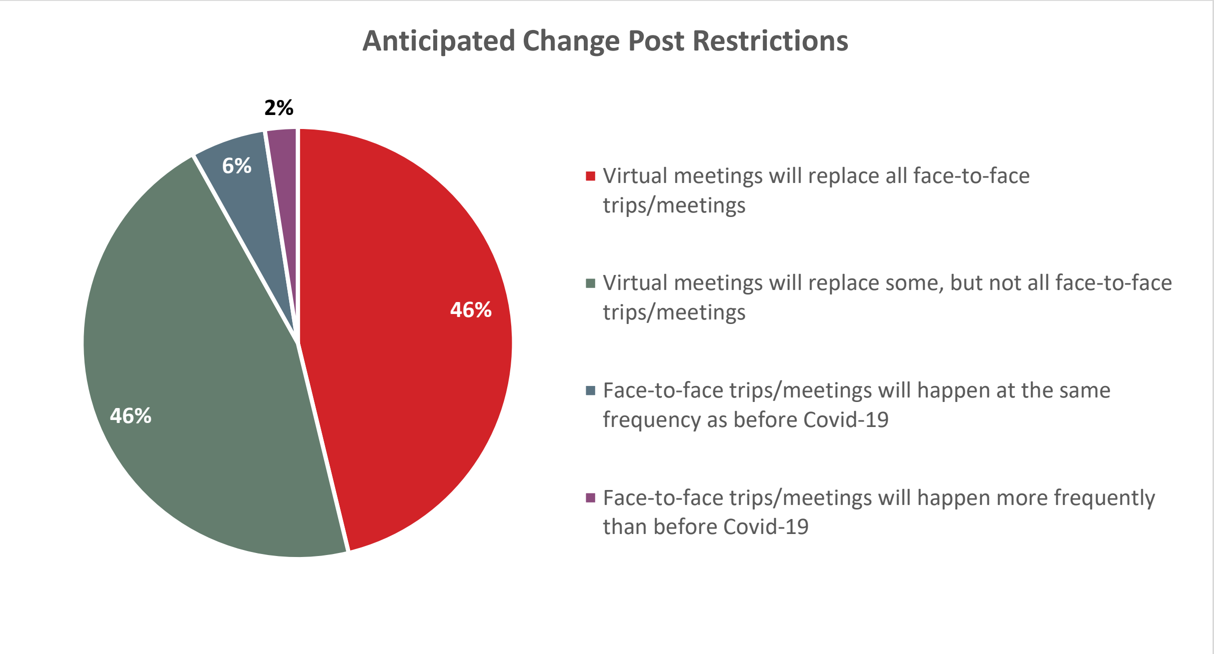
5.2 Commuting mode

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 (75%), as to before restrictions were in place (72%). Respondents anticipate using public transport, a train or a bus, slightly less post restrictions for their commute (6%), compared to before restrictions were in place (9%).

5.3 Business trips

5.3.1 Before Covid-19 restrictions, around half (48%) of working respondents took part in business meetings, with the majority (58%) travelling to attend between one and four business meetings in an average month.

5.3.2 Over nine in ten (92%) 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' [100]

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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