

Technical Appendix: Wave 13

1. RESEARCH METHODOLOGY

1.1 Research Objectives

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.

1.2 Survey

1.2.1 The travel behaviour and attitude surveys are being delivered through an online panel, issued every six to eight weeks, from June 2021, through to March 2022. The survey covers the following topic areas:

- Travel behaviour in the past seven days;
- Predicted travel behaviour if no restrictions were in place;
- Recalled travel behaviour before restrictions were implemented;
- Attitudes towards different ways of travelling;
- Anticipated travel behaviour over the next couple of weeks;
- Changes to walking and cycling habits;
- Anticipated changes to commutes and business meetings.

2. DEMOGRAPHICS

2.1 Data Tables

2.1.1 The following data tables reflect the demographic composition of the Wave 13 survey sample. These data tables are unweighted.

Age and Gender			
	Male	Female	Total
16-44	29%	28%	86
45-64	32%	48%	123
65+	39%	24%	95
Total	149	155	304

Which region do you live in?	
Aberdeenshire	49%
Aberdeen City	51%
Total	304

3. KEY FINDINGS

3.1 Data Tables

3.1.1 The following data tables underpin the key findings in the Wave 13 Survey report. Small weighting factors have been applied to ensure the data is representative of the age and gender of residents in the Nestrans region.

Age and Gender			
	Male	Female	Total
16-44	50%	50%	152
45-64	32%	32%	97
65+	18%	18%	55
Total	152	152	304

Which region do you live in?	
Aberdeenshire	45%
Aberdeen City	55%
Total	304

Which of the following best describes where you live?	
City or large town centre	33%
City or large town suburb	29%
Small town	16%
Village	14%
Rural	9%
Total	304

In the past seven days, how many times have you left your home to go....						
	Work	Drop off child to school/childcare	Shopping	Visit Friends/Family	Indoor leisure activities	Outdoor leisure activities
Once	5%	8%	28%	38%	17%	22%
2-3 times	14%	8%	47%	25%	14%	21%
4-5 times	24%	15%	12%	5%	5%	10%
6-7 times	10%	4%	5%	3%	4%	7%
8 or more times	1%	2%	1%	3%		2%
I have not made this journey in the past seven days	46%	63%	7%	26%	60%	38%
Base	304	304	304	304	304	304

If the Covid-19 pandemic had never happened, do you think you would have travelled to the following places more or less often, compared to the past seven days?						
	Work	Drop off child to school/childcare	Shopping	Visit Friends/Family	Indoor leisure activities	Outdoor leisure activities
Less often	4%	5%	8%	7%	6%	7%
About the same	40%	32%	64%	50%	40%	56%
More often	24%	8%	25%	39%	32%	21%
I would not have made this journey	32%	54%	3%	4%	22%	16%
Base	304	304	304	304	304	304

In the past seven days, when undertaking trips for going to the following, which way have you travelled most often?						
	Work	Drop off child to school/childcare	Shopping	Visit Friends/Family	Indoor leisure activities	Outdoor leisure activities

Car/ van as driver	62%	56%	60%	52%	54%	34%
Car/ van as passenger	14%	15%	13%	15%	16%	11%
Train	1%	2%			1%	1%
Bus, minibus or coach	4%	5%	6%	5%	5%	2%
Motorcycle, scooter or moped				1%	4%	
Taxi or minicab	1%	2%	1%	1%	2%	2%
Bicycle	1%		1%	2%	1%	6%
Walking	13%	17%	18%	21%	11%	38%
Journey sharing in the car/ car pooling	3%	3%	1%	4%	6%	4%
Other	0%			0%		1%
Base	165	112	282	224	122	190

In the longer-term (for instance, about a year from now), when undertaking trips, which way of travelling do you think you will use most often?

	Work	Drop off child to school /childcare	Shopping	Visit Friends/Family	Indoor leisure activities	Outdoor leisure activities
Car/ van as driver	63%	49%	61%	53%	50%	39%
Car/ van as passenger	7%	14%	14%	13%	20%	9%
Train	2%		1%	2%	1%	1%
Bus, minibus or coach	3%	3%	8%	4%	4%	2%
Motorcycle, scooter or moped		3%	1%	1%	4%	1%
Taxi or minicab	1%	2%		0%	2%	1%
Bicycle	1%	2%	1%	2%	4%	5%
Walking	13%	20%	14%	18%	10%	38%
Journey sharing in the car/ car pooling	6%	2%		5%	4%	1%
Other			1%	1%		1%
I will not make this journey	2%	5%				2%
Base	165	112	282	224	122	190

Thinking about before Covid-19 travel restrictions and guidance, when undertaking trips for going to work, which way did you travel most often?

	Work	Drop off child to school /childcare	Shopping	Visit Friends/Family	Indoor leisure activities	Outdoor leisure activities
--	------	-------------------------------------	----------	----------------------	---------------------------	----------------------------

Car/ van as driver	62%	62%	60%	53%	57%	46%
Car/ van as passenger	9%	12%	17%	22%	17%	12%
Train	1%			2%	1%	0%
Bus, minibus or coach	10%		7%	6%	9%	3%
Motorcycle, scooter or moped						
Taxi or minicab	2%		0%	2%	1%	1%
Bicycle	0%	1%	1%	1%	1%	3%
Walking	13%	19%	13%	13%	10%	31%
Journey sharing in the car/ car pooling	2%	6%	2%	1%	3%	2%
Other	0%					1%
Base	223	144	296	294	246	252

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?

	More likely	About the same	Less likely	Base
Use home delivery for supermarket/ grocery shopping	28%	55%	17%	287
Shop in-store closer to home	32%	58%	10%	295
Cycle for leisure	23%	58%	19%	275
Walk/wheel (mobility aid) for leisure	31%	60%	9%	287
Use a car to get around	25%	60%	14%	289
Use a bus or train to get around	14%	51%	36%	295
Work from home at least part time	26%	49%	25%	272
Order takeaway instead of going to a restaurant	27%	57%	17%	294
Travel to a town/city centre	15%	57%	29%	293

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

	Very or quite positively	Neither positively nor negatively	Very or quite negatively	Base
Car/ van as driver	77%	17%	6%	297

Car/ van as passenger	75%	21%	4%	299
Car sharing / pooling	33%	34%	32%	277
Train	39%	30%	31%	290
Bus, minibus or coach	43%	24%	34%	295
Motorcycle, scooter or moped	31%	28%	41%	256
Taxi or minicab	33%	34%	33%	289
Bicycle	50%	28%	22%	272
Walking	82%	15%	3%	300

Why do you feel negatively towards travelling by train? (Top 5)

Cost/ too expensive	50%
Behaviour of other passengers	47%
Concern about overcrowding	46%
Concerns that social distancing may not be in place	42%
Concern over catching coronavirus/other illness	41%
Base	89

Why do you feel negatively towards travelling by bus? (Top 5)

Behaviour of other passengers	45%
Concern over catching coronavirus/other illness	44%
Concerns that social distancing may not be in place	44%
Concern about overcrowding	44%
Travelling by car is easier/more convenient	41%
Base	99

Thinking about travelling over the next month or so, which of the following would make you feel safer to use public transport? (Top 10)

Deep-cleaning of the interiors of vehicles, stations and bus stops	24%
Limiting the number of people that can board the train/tram/bus	23%
Access to hand sanitiser at stations/stops	20%
Knowing it is not going to be too busy	19%
Actively enforced social distancing on-board, through staff presence and CCTV	18%
Actively enforced social distancing when queuing for tickets through staff presence and CCTV	14%
Signs instructing social distancing measures	13%
Being able to travel at off-peak times	11%
Being allocated a seat in advance	10%
Temperature checks on passengers at stations/stops	10%
Base	304

To what extent do you agree, or disagree, with the following statements:

	Strongly or somewhat agree	Neither agree nor disagree	Strongly or somewhat disagree	Base
I am concerned about people spreading or contracting the virus whilst using public transport	70%	18%	12%	302
I am concerned about people spreading or contracting the virus whilst using taxis/minicabs	68%	20%	12%	298
I am concerned about people spreading or contracting the virus whilst using shared transport methods, including car clubs or car sharing	63%	26%	11%	294
The use of face coverings on public transport makes me feel safer	74%	14%	12%	299
Social distancing on public transport makes me feel safer	76%	17%	7%	298
I am concerned that I will not be allowed to board the bus/train by the time it reaches me as it will be full	57%	30%	14%	293

Do you think you will change how much you travel for the following reasons, over the next month or so?

	Increase	No change	Decrease	Base

Work	15%	75%	10%	304
Drop off child to school	10%	82%	8%	304
Shopping	20%	77%	3%	304
Visit Friends/Family	23%	73%	5%	304
Indoor leisure activities	16%	72%	12%	304
Outdoor leisure activities	24%	71%	6%	304

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

	Very or fairly likely	Neither likely nor unlikely	Very or quite unlikely	Base:
Book at least one leisure trip for travel abroad	34%	9%	58%	300
Book at least one leisure trip for travel in Scotland	51%	18%	31%	296
Book at least one leisure trip for travel in the rest of the UK	38%	22%	40%	297
Travel by air within the UK	31%	13%	56%	296
Travel by air abroad	31%	6%	63%	297

Since the Covid-19 travel restrictions, has the average amount of time you spend walking and cycling per week for the following purposes changed?

	Increase	No change	Decrease	Base
Walking: for leisure/exercise	47%	46%	7%	287
Walking: to replace a journey I would normally make another way	32%	59%	9%	251
Cycling: for leisure/exercise	33%	57%	11%	201

Cycling: to replace a journey I would normally make another way	30%	61%	9%	193
--	-----	-----	----	-----

How likely are you to continue the increase after the Covid-19 travel restrictions are lifted?

	Walking: for leisure/exercise	Cycling: for leisure/exercise
Very or fairly likely	93%	89%
Neither likely nor unlikely	7%	11%
Very or quite unlikely	0%	0%
Total	170	66

Thinking about days spent working at the following locations in an average month...

	Pre-Restrictions	Currently	Post-Restrictions
Office/Other Location	86%	70%	80%
Home	14%	26%	20%

Which way of travelling do you think you will use most often?

Car/ van as driver	69%
Car/ van as passenger (with your household)	4%
Train	1%
Bus, minibus or coach	4%
Taxi or minicab	0%
Bicycle	1%
Walking (including with mobility assistance)	12%
Journey sharing in the car/ car pooling	6%
Other	2%
Base	174

In the longer-term (such as a year from now), would you like to be able to make changes to the times that you work, compared with before Covid-19?

Yes – I would like to change the time of day that I start/finish work	31%
Yes – I would like to work the same hours over fewer days	15%
Yes – I would like my hours to be more flexible generally	19%
Yes – other	1%

No – I do not want to make changes	46%
Base	203

To what extent do you think it is likely or unlikely that your employer will allow you to change your working times?	
Very or quite likely	44%
Very or quite unlikely	41%
Don't know	14%
Base	203

Before Covid-19 travel restrictions, in an average month, about how many business meetings did you travel to attend outside of your regular workplace?	
1-2	13%
3-4	11%
5-6	10%
7-8	5%
9-10	1%
More than 10 a month	7%
Not applicable – did not travel for business meetings	53%
Base	203

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?	
Virtual meetings will replace all face-to-face trips/meetings	54%
Virtual meetings will replace some, but not all face-to-face trips/meetings	32%
Face-to-face trips/meetings will happen at the same frequency as before Covid-19	12%
Face-to-face trips/meetings will happen more frequently than before Covid-19	2%
Base	88

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

A diverse group of results-oriented people, we are part of a strong team of professionals worldwide. Through client business planning, customer research and strategy development we create solutions that work for real people in the real world.

For more information visit www.systra.co.uk

Birmingham – Newhall Street

5th Floor, Lancaster House, Newhall St,
Birmingham, B3 1NQ
T: +44 (0)121 393 4841

Birmingham – Edmund Gardens

1 Edmund Gardens, 121 Edmund Street,
Birmingham B3 2HJ
T: +44 (0)121 393 4841

Dublin

2nd Floor, Riverview House, 21-23 City Quay
Dublin 2, Ireland
T: +353 (0) 1 566 2028

Edinburgh – Thistle Street

Prospect House, 5 Thistle Street, Edinburgh EH2 1DF
United Kingdom
T: +44 (0)131 460 1847

Glasgow – St Vincent St

Seventh Floor, 124 St Vincent Street
Glasgow G2 5HF United Kingdom
T: +44 (0)141 468 4205

Glasgow – West George St

250 West George Street, Glasgow, G2 4QY
T: +44 (0)141 468 4205

Leeds

100 Wellington Street, Leeds, LS1 1BA
T: +44 (0)113 360 4842

London

3rd Floor, 5 Old Bailey, London EC4M 7BA United Kingdom
T: +44 (0)20 3855 0079

Manchester – 16th Floor, City Tower

16th Floor, City Tower, Piccadilly Plaza
Manchester M1 4BT United Kingdom
T: +44 (0)161 504 5026

Newcastle

Floor B, South Corridor, Milburn House, Dean Street, Newcastle, NE1
1LE
United Kingdom
T: +44 (0)191 249 3816

Perth

13 Rose Terrace, Perth PH1 5HA
T: +44 (0)131 460 1847

Reading

Soane Point, 6-8 Market Place, Reading,
Berkshire, RG1 2EG
T: +44 (0)118 206 0220

Woking

Dukes Court, Duke Street
Woking, Surrey GU21 5BH United Kingdom
T: +44 (0)1483 357705

Other locations:

France:

Bordeaux, Lille, Lyon, Marseille, Paris

Northern Europe:

Astana, Copenhagen, Kiev, London, Moscow, Riga, Wroclaw

Southern Europe & Mediterranean: Algiers, Baku, Bucharest,

Madrid, Rabat, Rome, Sofia, Tunis

Middle East:

Cairo, Dubai, Riyadh

Asia Pacific:

Bangkok, Beijing, Brisbane, Delhi, Hanoi, Hong Kong, Manila,
Seoul, Shanghai, Singapore, Shenzhen, Taipei

Africa:

Abidjan, Douala, Johannesburg, Kinshasa, Libreville, Nairobi

Latin America:

Lima, Mexico, Rio de Janeiro, Santiago, São Paulo

North America:

Little Falls, Los Angeles, Montreal, New-York, Philadelphia,
Washington

The SYSTRA logo is displayed in a large, bold, red, sans-serif font. The letters are thick and closely spaced, with a slightly irregular, hand-drawn appearance. The 'S' and 'Y' are particularly prominent, with the 'S' having a large, rounded top and the 'Y' having a wide, flat base. The 'T' is also very thick, and the 'R' and 'A' are similarly bold and blocky. The overall impression is one of strength and stability.