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NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 13 REPORT (SURVEY UNDERTAKEN BETWEEN 4TH OCTOBER AND 11TH OCTOBER 2021)

nestrans

SYSTRA

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SYSTRA

TABLE OF CONTENTS

1. INTRODUCTION

1.1 Approach

1.1.1 Nestrans, in partnership with Aberdeen City and Aberdeenshire Council, 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 13 of 16 Waves. The data was collected between 4th October and 11th October 2021.

1.2.2 A total of 304 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 Any differences highlighted in the report between different locations are statistically significant.

1.2.4 In August 2021, the Scottish government announced that Scotland would move beyond level 0, and the legal requirement for physical distancing and limits on gatherings were removed, and all venues across Scotland could re-open on 9th August 2021[1].

1.2.5 The protective measures at the time of the Wave 13 survey included[2]:

- 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 over 18 who attended large events were required to show evidence that they were fully vaccinated or evidence that they are exempt;
- While a gradual return to offices was allowed, it was encouraged that employers should exercise caution and employees should work from home where possible; and
- Some boarder control remained, relating to international travel.

[1] https://www.gov.scot/news/scotland-to-move-beyond-level-0/
[2] https://www.gov.scot/publications/coronavirus-covid-19-staying-safe-and-protecting-others/

2. JOURNEYS IN THE LAST SEVEN DAYS

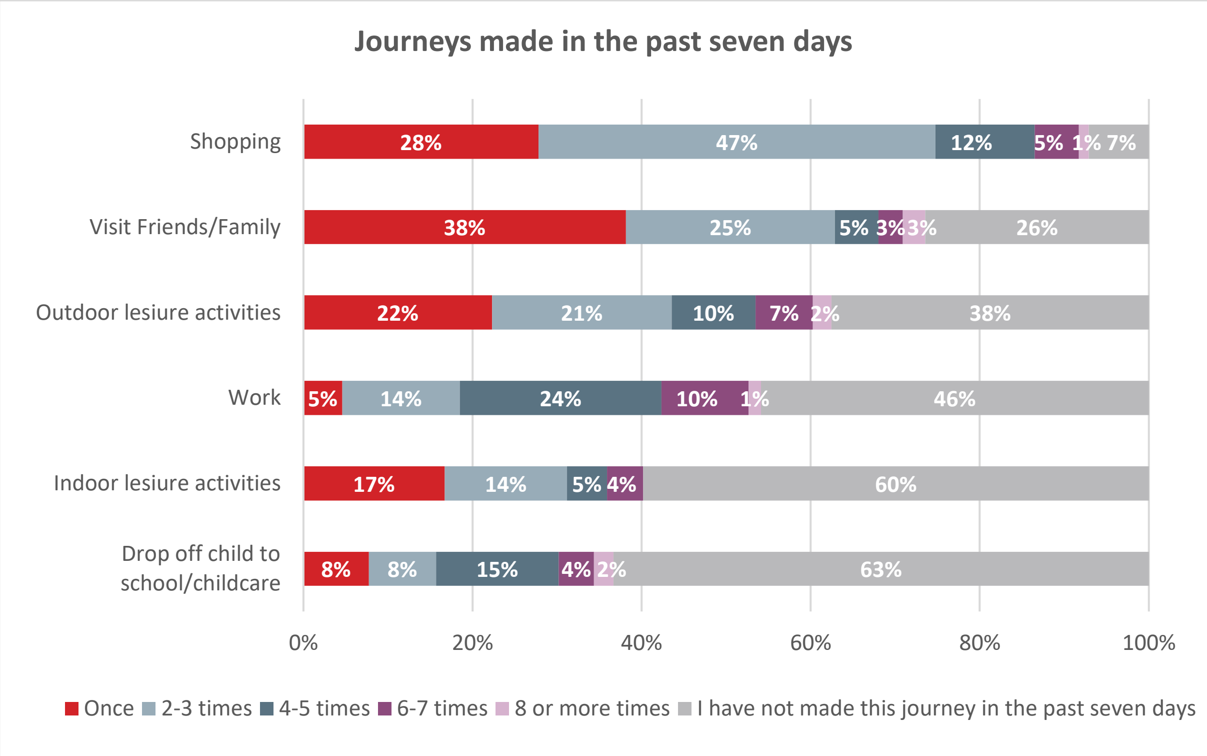
2.1 Frequency of journeys

2.1.1 All respondents (100%) had made at least one journey in the last seven days.

2.1.2 In the past seven days, the most frequently made trip was for shopping, with over nine in ten of respondents (93%) having made this trip at least once, and three quarters (75%) having made this trip between one and three times.

2.1.3 Around three quarters of respondents (74%) reported travelling to visit family and friends at least once in the last seven days, a slight increase from Wave 12 (68%). Around six in ten made trips to outdoor leisure activities (62%) and two fifths (40%) had travelled to indoor leisure activities. Respondents from Aberdeen City were more likely to have taken part in an indoor leisure activity in the last seven days compared to those from Aberdeenshire (48% vs 31%).

2.1.4 Over half of respondents (54%) had travelled to work in the last seven days. 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 (61% vs 43%). Around four in ten (37%) had dropped off their child to school, nursery or childcare at least once in the last seven days.



Base: All respondents [304]

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:

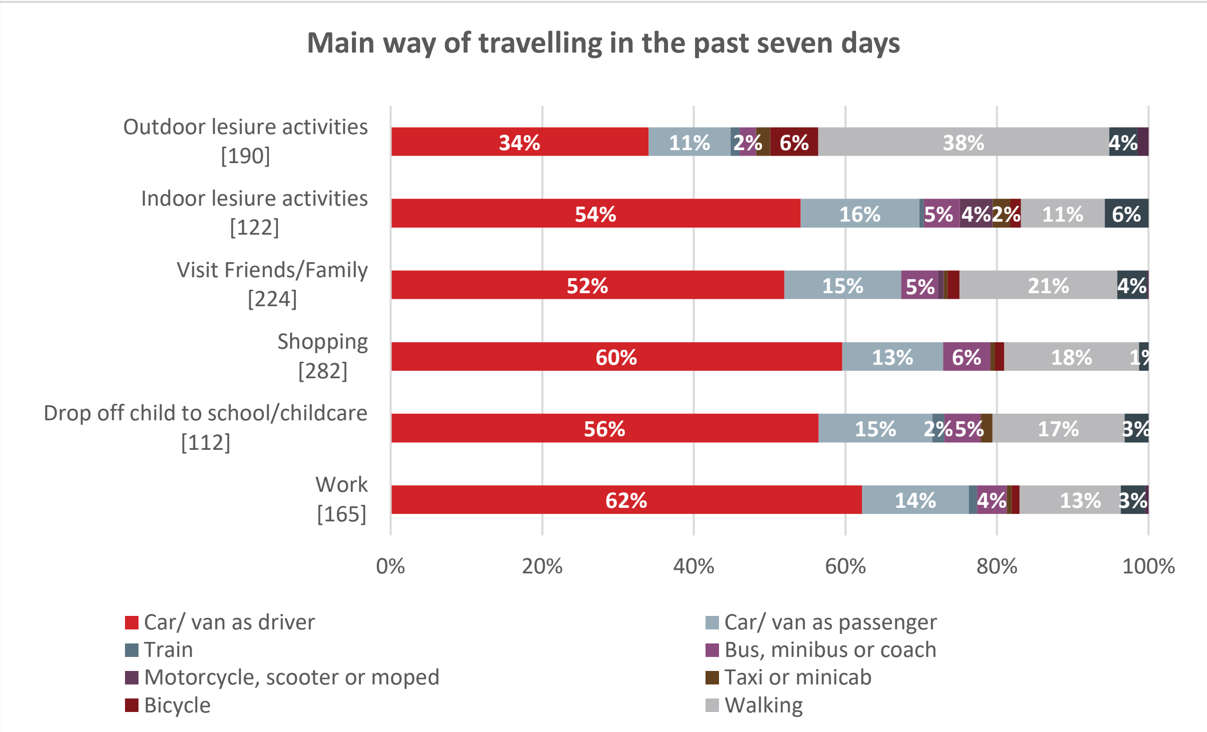
- Over three in ten predicted that they would have visited friends and family (39%) and travelled to indoor leisure activities (32%) more often; and
- Around a quarter predicted that they would have gone shopping (25%); travelled to work (24%); and travelled to outdoor leisure activities (21%) more often.

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 (49%-80%).

2.2.2 Almost four in ten (38%) respondents travelled by walking as their main way of travelling to undertake outdoor leisure activities. Around a fifth (21%) walked to visit friends and family and to go shopping (18%).

2.2.3 Respondents from Aberdeen City were more than twice as likely to have travelled to go shopping by bicycle or walking compared to those from Aberdeenshire (24% vs 12%).



Base: Respondents who had undertaken a journey in the last seven days [112-282]

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

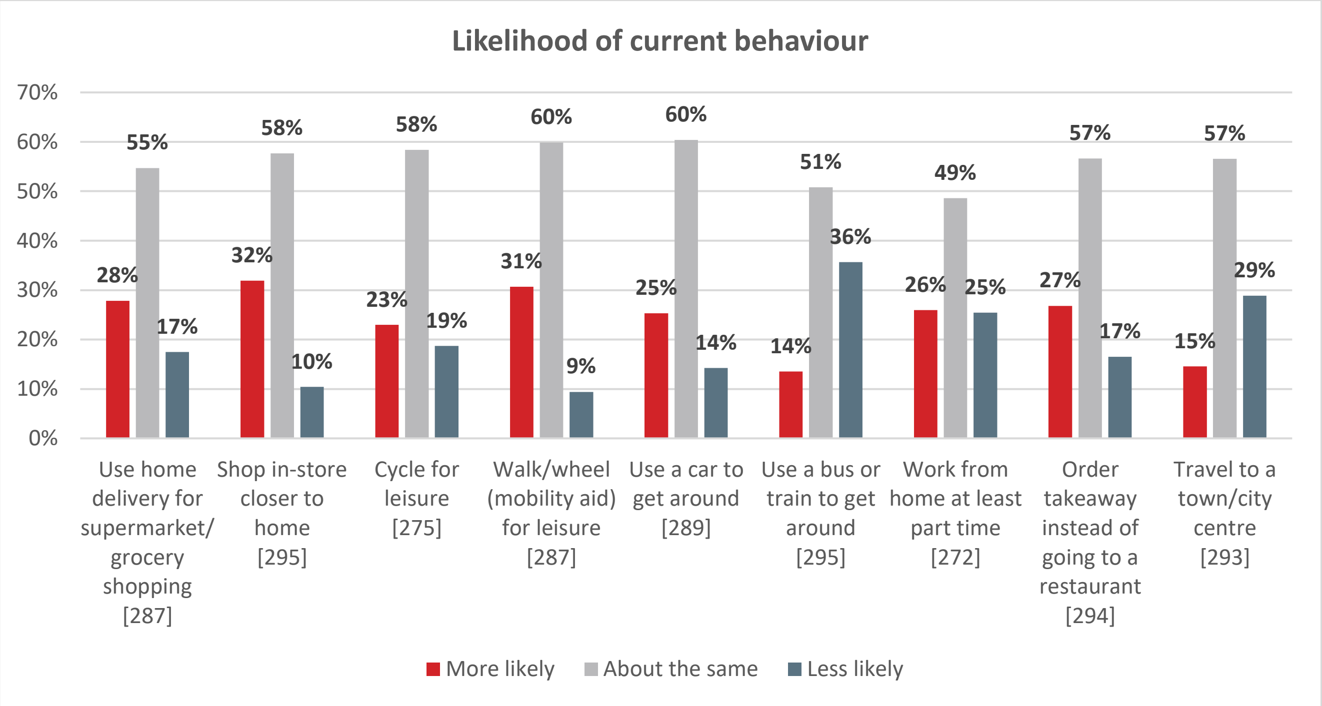
2.2.4 Respondents who had made journeys for specific purposes in the last seven days, were asked what their main way of travelling would be for the same journey purpose in the longer term, for instance in a year's time. There was little difference between their current main way of travelling and anticipated 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 quarter (28%) reported that they were more likely to use home delivery for supermarket shopping than before restrictions were put in place, while around a third (32%) reported that they were more likely to shop in-store closer to home. This is similar to Wave 12.

2.3.2 Just under a third (31%) of respondents reported that they are more likely to walk for leisure now compared to before the pandemic, a higher proportion than those who say they are less likely (9%). Around a quarter of respondents reported that they are more likely to cycle for leisure or exercise purposes (23%), also a higher proportion than those who stated they are less likely to (19%).

2.3.3 Over a third of respondents (36%) 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' [272-295]

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

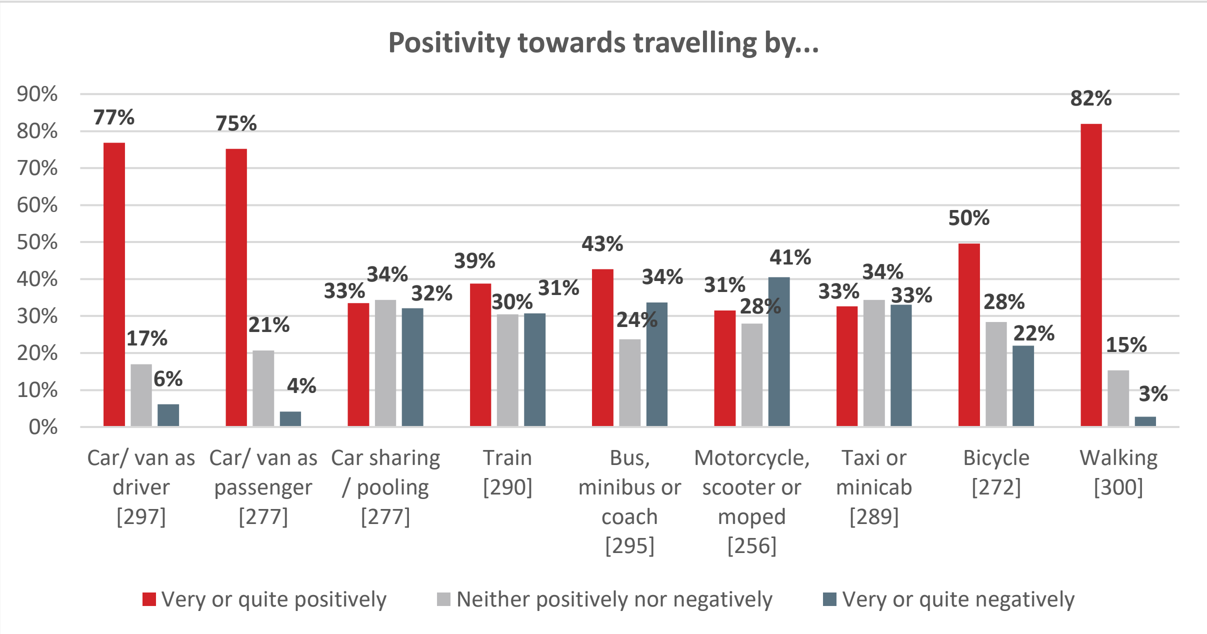
3.1 Positivity and negativity towards travelling by different methods

3.1.1 Around three quarters of respondents reported that they felt positively towards travelling by car or van as a driver (77%) or as a passenger (75%), while a third (33%) felt positively towards car sharing/pooling.

3.1.2 Around eight in ten (82%) felt positively towards walking, while around half (50%) felt this way towards travelling by bicycle.

3.1.3 More respondents reported feeling positively than negatively towards travelling by train (39% vs 31%) and by bus, minibus or coach (43% vs 34%). The same proportion of respondents felt positively as negatively towards travelling by taxi or minicab (both 33%). 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 bus (55%) than those who had not reported using the bus or train (31%).

3.1.4 These findings are similar to Wave 12.



Base: All respondents excluding those who answered 'Don't know' [256-300]

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 (50%);
- Behaviour of other passengers (47%);
- Concern about overcrowding (46%);

- Concerns that social distancing may not be in place (42%); and
- Concern over catching coronavirus/other illness (41%).

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

- 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%); and
- Travelling by car is easier/more convenient (41%).

3.2 Current safety concerns and measures

3.2.1 Seven in ten or fewer respondents strongly or somewhat agree that they were concerned about people spreading or contracting the virus whilst using:

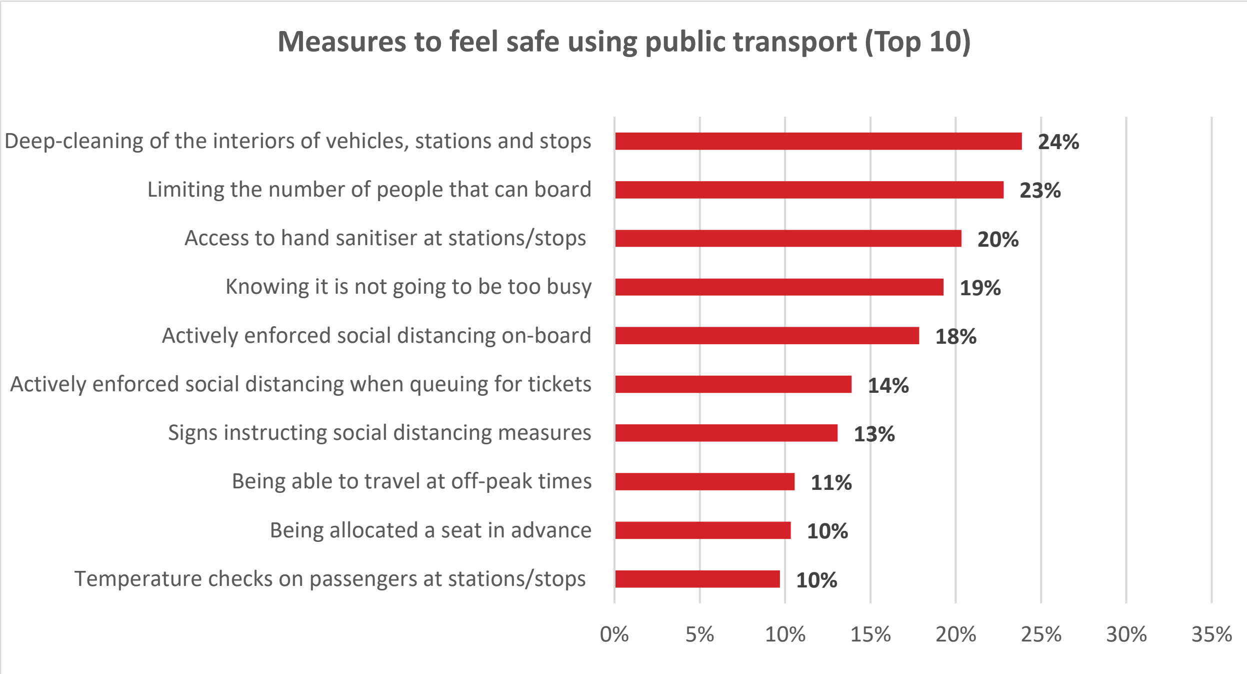
- Public transport (70%);
- Taxis/minicabs (68%); and
- Shared transport methods, including car clubs or car sharing (63%).

3.2.2 This is an overall slight decrease from Wave 12.

3.2.3 Around three quarters of respondents agreed that the use of face coverings (74%) and social distancing (76%) makes them feel safer when using public transport. About six in ten (57%) 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:

- 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%); and
- Actively enforced social distancing when queuing for tickets through staff presence and CCTV (14%).



Base: All respondents [304]

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 Over a third (37%) suggested that they already felt safe using public transport, an increase from Wave 12 (23%). Furthermore, less than a sixth (14%) suggested that nothing would make them feel safer using public transport in the next month or so, a continued decreased from Wave 12 (16%) and Wave 11 (20%).

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 (47% and 33% respectively). Walking and cycling have also been used to replace some journeys that normally would have been made another way (32% and 30% respectively). Respondents from Aberdeen City were more likely to report an increase in walking since Covid-19 travel restrictions compared to those from Aberdeenshire (53% vs 40%).

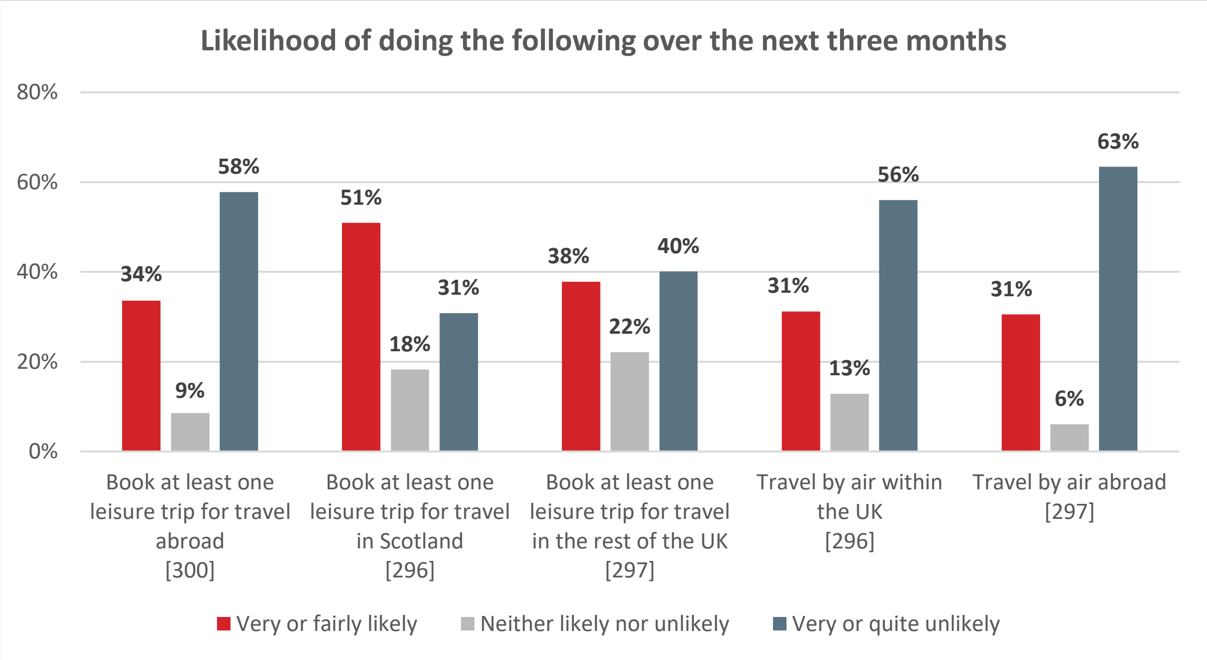
4.1.2 The majority of these respondents expect that they will maintain these reported increased levels once Covid-19 restrictions are lifted, mainly for walking (93%) and cycling (89%) for leisure/exercise purposes.

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 (82%), to go shopping (77%), to go to work (75%), to visit family and friends (73%), to go to indoor leisure activities (72%), or to go to outdoor leisure activities (71%). Notably, around a quarter anticipated an increase in travelling to outdoor leisure activities (24%) and visiting family and friends (23%) in the next two weeks.

4.2.2 Over half (51%) thought it likely that they would book a leisure trip for travel in Scotland in the next three months, and two fifths (38%) thought that they would book a trip in the rest of the UK. Three in ten thought that they would book a trip abroad (34%). 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 (39% vs 26%).

4.2.3 These findings are similar to Wave 12.



Base: All respondents, excluding those who answered 'Don't know' [296-300]

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

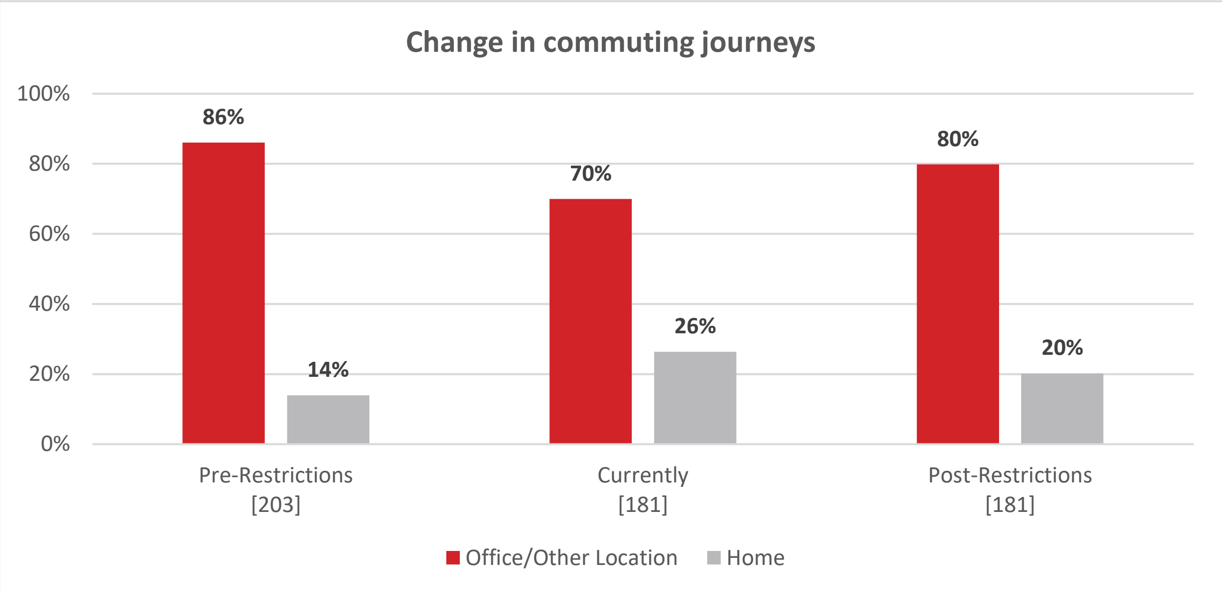
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting trips

5.1.1 Of the 67% of respondents who reported that they were working before Covid-19 restrictions, around three quarters (73%) were working full-time (i.e. five days a week or more) and around a quarter (27%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) on 86% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 70% commuting on their working days, a 10% increase from Wave 12. Furthermore, respondents are working from home on 26% of their working days and 4% are furloughed.

5.1.3 Once all restrictions are lifted, on average, respondents predict making commuting journeys on 80% of their working days. This is equivalent to an average reduction in commuting journeys of 6%, from before Covid-19 restrictions.



Base: Working respondents [181-203]

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 half of working respondents (54%) would like to work more flexibly, with changing start/finish times (31%), more flexible working hours (19%), and/or working the same hours over fewer days (15%), compared to before Covid-19. This is a decrease in those who would like to work more flexibly from Wave 12 (63%).

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 (41%) suggested it was very or quite unlikely, and around a sixth (14%) did not know how likely it was.

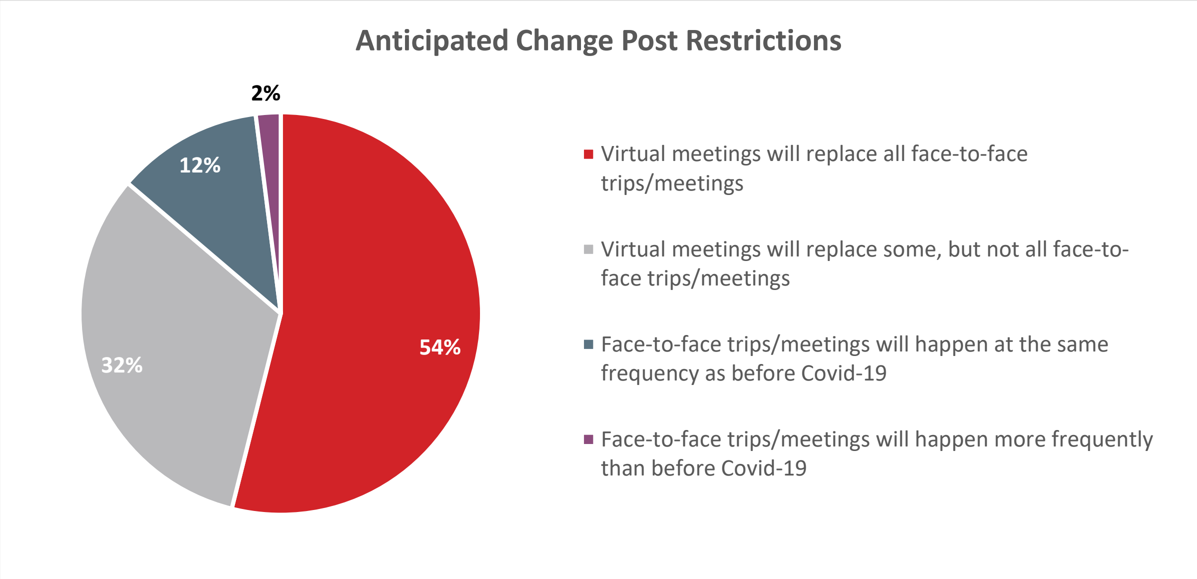
5.2 Commuting mode

5.2.1 Slightly more respondents expect to travel to work by car or van as either a passenger or driver, by motorbike or by car sharing/pooling as their main way of travelling once restrictions are lifted (80%) compared to before restrictions were in place (73%). Slightly fewer respondents anticipate using public transport, a train or a bus as their main way of travelling post restrictions for their commute (5%), compared to before restrictions were in place (10%).

5.3 Business trips

5.3.1 Before Covid-19 restrictions, around half (47%) of working respondents took part in business meetings, with the majority (51%) travelling to attend between one and four business meetings in an average month.

5.3.2 Just under nine in ten (86%) 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' [94]

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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