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NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 14 REPORT (SURVEY UNDERTAKEN BETWEEN 29TH NOVEMBER AND 6TH DECEMBER 2021)

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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 14 of 16 Waves. The data was collected between 29th November and 6th December 2021.

1.2.2 A total of 307 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 not evenly split between the two council areas; 39% of respondents were from Aberdeenshire and 61% were from Aberdeen City.

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

1.2.4 The protective Covid-19 measures at the time of the Wave 14 survey included[1]:

- Encouragement for individuals to get the vaccine or vaccine booster when offered continued;
- Individuals were encouraged to take regular lateral flow tests before socialising and mixing with other households;
- 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;
- Coronavirus vaccine certificates (or passports) were needed to attend certain events;
- 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/coronavirus-covid-19/

1.2.5 In addition, whilst measures in response to the Omicron variant of Covid-19 had not yet come into place, during the fieldwork period, concerns about the newly identified variant were present in the media[2].

1.2.6 Finally, towards the end of November 2021, and at the start of the fieldwork period, Storm Arwen had a large impact on the UK, in particular in Aberdeenshire. Many homes were left without power for multiple days, schools were closed and there was significant damage to the area, with many trees falling and damaging infrastructure due to high winds[3,4,5].

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[2] https://www.bbc.co.uk/news/world-59468155
[3] https://www.bbc.co.uk/news/uk-scotland-highlands-islands-59416262
[4] https://www.bbc.co.uk/news/uk-scotland-north-east-orkney-shetland-59488296
[5] https://www.nts.org.uk/stories/the-aftermath-of-storm-arwen

2. JOURNEYS IN THE LAST SEVEN DAYS

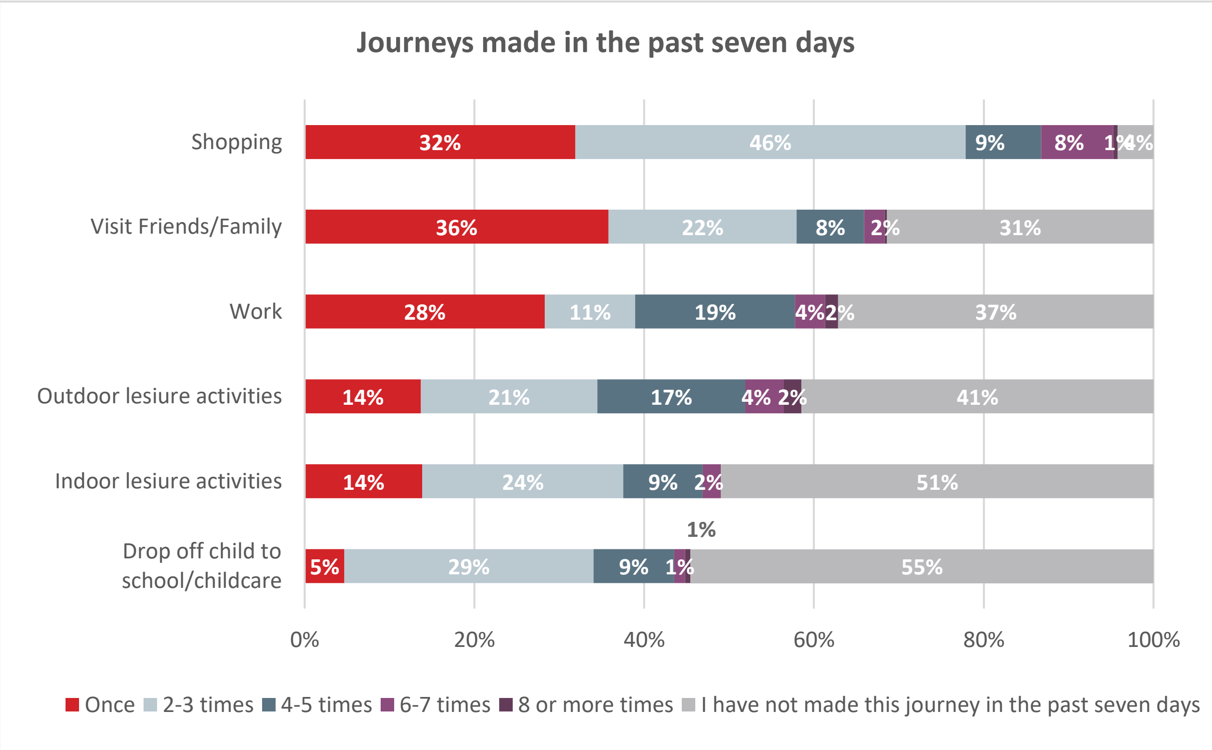
2.1 Frequency of journeys

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 (95%) having made this trip at least once, and over three quarters (78%) having made this trip between one and three times.

2.1.3 Around seven in ten of respondents (68%) reported travelling to visit family and friends at least once in the last seven days. Around six in ten made trips to outdoor leisure activities (58%) and around half (49%) had travelled to indoor leisure activities, an increase from Wave 13 (40%).

2.1.4 Around six in ten (64%) had travelled to work in the last seven days. Over four in ten (45%) had dropped off their child to school, nursery or childcare at least once in the last seven days. Respondents from Aberdeen City were more likely than those from Aberdeenshire to have travelled to work (72% vs 47%) and dropped off a child to school or nursery of childcare (60% vs 22%) in the last seven days, with the disparity likely reflective of the impacts of storm Arwen.



Base: All respondents [307]

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:

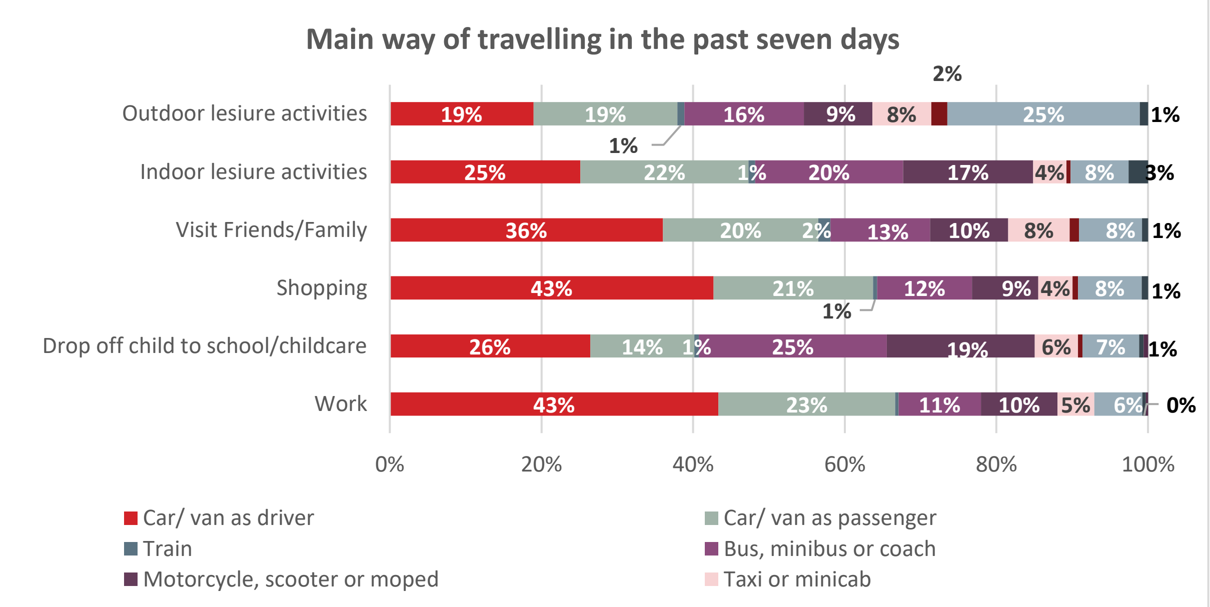
- Over four in ten predicted that they would have visited friends and family (45%) and a third (33%) predicted they would have travelled to indoor leisure activities more often; and
- Around a quarter predicted that they would have gone shopping (26%) and dropped of their child to school or childcare more often (23%).

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 (39%-67%).

2.2.2 A quarter (25%) of respondents travelled by walking as their main way of travelling to undertake outdoor leisure activities. Between 6%-8% reported walking as their main way of travelling for the remaining journey types, a decrease seen from previous waves.

2.2.3 Contrastingly, there was an increase in those who reported travelling by bus to drop off their child to school or childcare (25%); to travel to indoor leisure activity (20%); and outdoor leisure activity (16%). Furthermore, between 9% and 19% reported travelling by motorcycle, scooter or moped across the journey purposes. It should be noted, that these figures are much higher than the percentages of those travelling by motorcycle, scooter or moped from previous waves and there does not appear to be an explanation as to why this is the case.



Base: Respondents who had undertaken a journey in the last seven days [140-294]

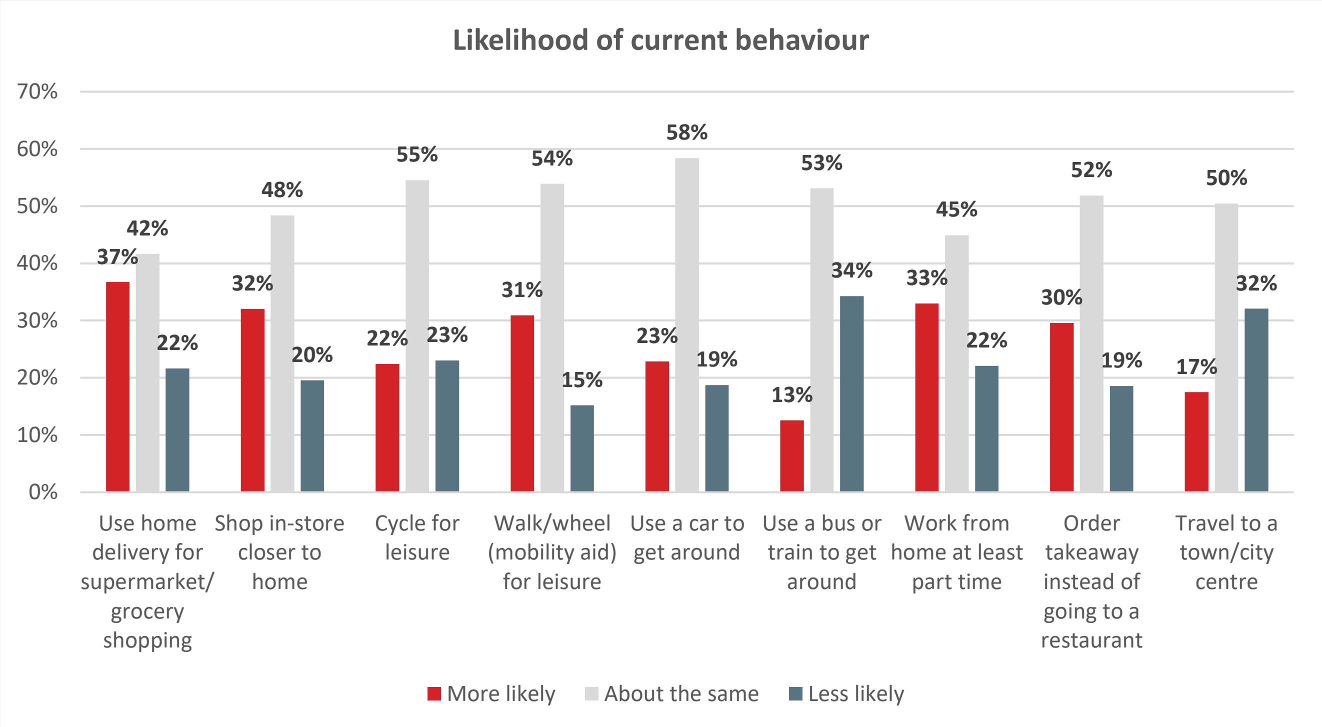
Figure 2. In the past seven days, when undertaking trips for going to work, which way have you travelled most often?

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. Over a third (37%) 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 13.

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 (15%). Around a quarter of respondents reported that they are more likely to cycle for leisure or exercise purposes (22%), and a similar proportion state they are less likely to (23%).

2.3.3 Over a third of respondents (34%) 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' [281-302]

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?

SYSTRA

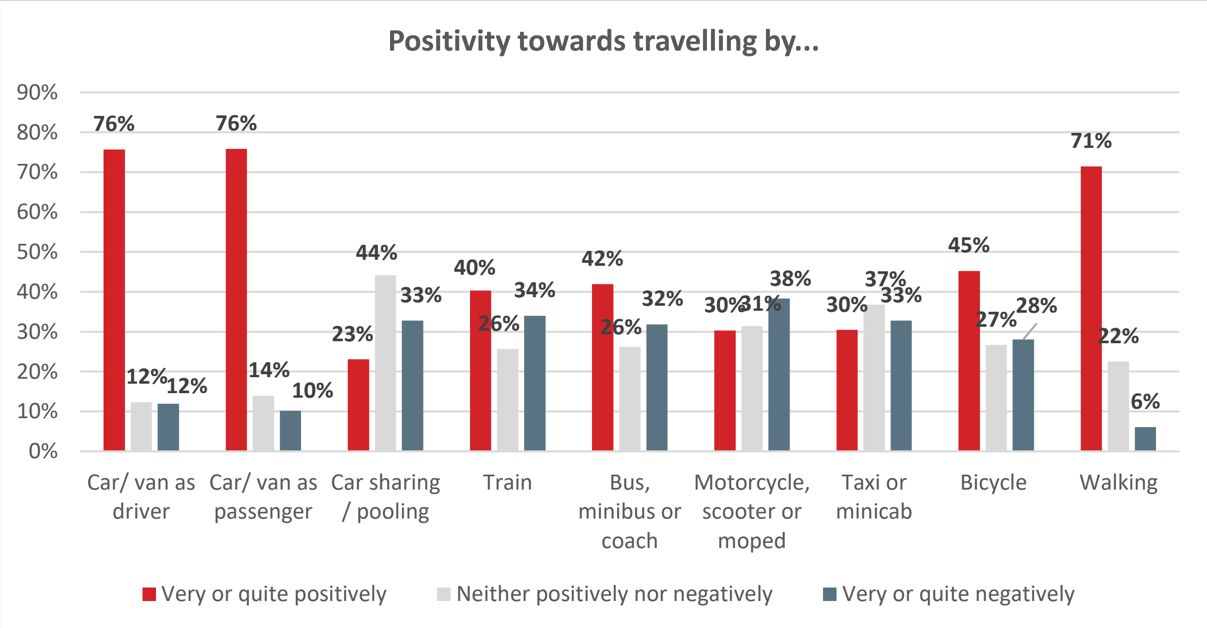
3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

3.1 Positivity and negativity towards travelling by different methods

3.1.1 Around three quarters (both 76%) of respondents reported that they felt positively towards travelling by car or van as a driver or as a passenger, while less than a quarter (23%) felt positively towards car sharing/pooling, a decrease from Wave 13 (33%).

3.1.2 Around eight in ten (71%) felt positively towards walking, while around half (45%) felt this way towards travelling by bicycle, a decrease from Wave 13 (82% and 50% respectively).

3.1.3 More respondents reported feeling positively than negatively towards travelling by train (40% vs 34%) and by bus, minibus or coach (42% vs 32%). A similar proportion of respondents felt positively or negatively towards travelling by taxi or minicab (30% vs 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 more likely to feel positively toward travel by train than non-users (54% vs 23%), and the same pattern was seen for feelings toward bus travel (58% vs 22%).



Base: All respondents excluding those who answered 'Don't know' [277-304]

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

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

- Concern over catching coronavirus/other illness (47%);
- Travelling by car is easier/more convenient (47%);
- Behaviour of other passengers (44%);
- Cost/too expensive (42%); and

- Concerns that social distancing may not be in place (41%).

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

- Travelling by car is easier/more convenient (48%);
- Concern over catching coronavirus/other illness (45%);
- Concern about overcrowding (43%);
- Behaviour of other passengers (39%); and
- Concerns that social distancing may not be in place (35%).

3.2 Current safety concerns and measures

3.2.1 Over seven in ten respondents strongly or somewhat agreed that they were concerned about people spreading or contracting Covid-19 whilst using:

- Public transport (83%); and
- Taxis/minicabs (78%).

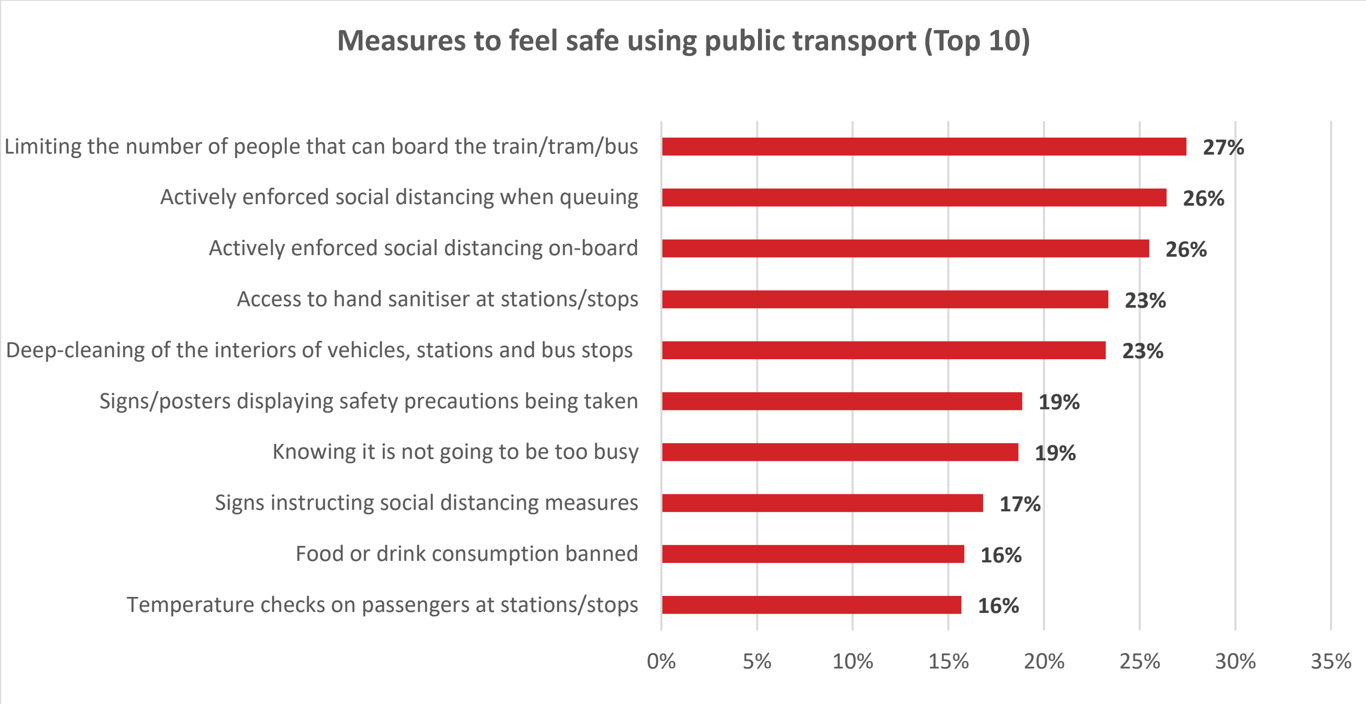
3.2.2 This is an increase in concern from Wave 13 (70% and 68%, respectively), and could be reflective of increasing concern around the Omicron variant at the time of fieldwork.

3.2.3 Concern about people spreading or contracting Covid-19 whilst using shared transport methods, including car clubs or car sharing (56%) was slightly decreased from Wave 13 (63%).

3.2.4 Over three quarters of respondents agreed that the use of face coverings (79%) and social distancing (82%) makes them feel safer when using public transport. About six in ten (64%) were concerned that they will not be allowed to board a train by the time it reaches them as it will be full. These findings show an increase from Wave 13.

3.2.5 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 (27%);
- Actively enforced social distancing when queuing for tickets through staff presence and CCTV (26%);
- Actively enforced social distancing on-board, through staff presence and CCTV (26%);
- Access to hand sanitiser at stations/stops (23%); and
- Deep-cleaning of the interiors of vehicles, stations and bus stops (23%).



Base: All respondents [307]

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 Over a fifth (22%) of respondents suggested that they already felt safe using public transport, a decrease from Wave 13 (36%). Furthermore, less than a sixth (15%) suggested that nothing would make them feel safer using public transport in the next month or so, a similar finding to Wave 13

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 (35% and 21% respectively). Walking and cycling have also been used to replace some journeys that normally would have been made another way (27% and 19% respectively). This is a general decrease compared to Wave 13, likely a reflection of the weather and time of year.

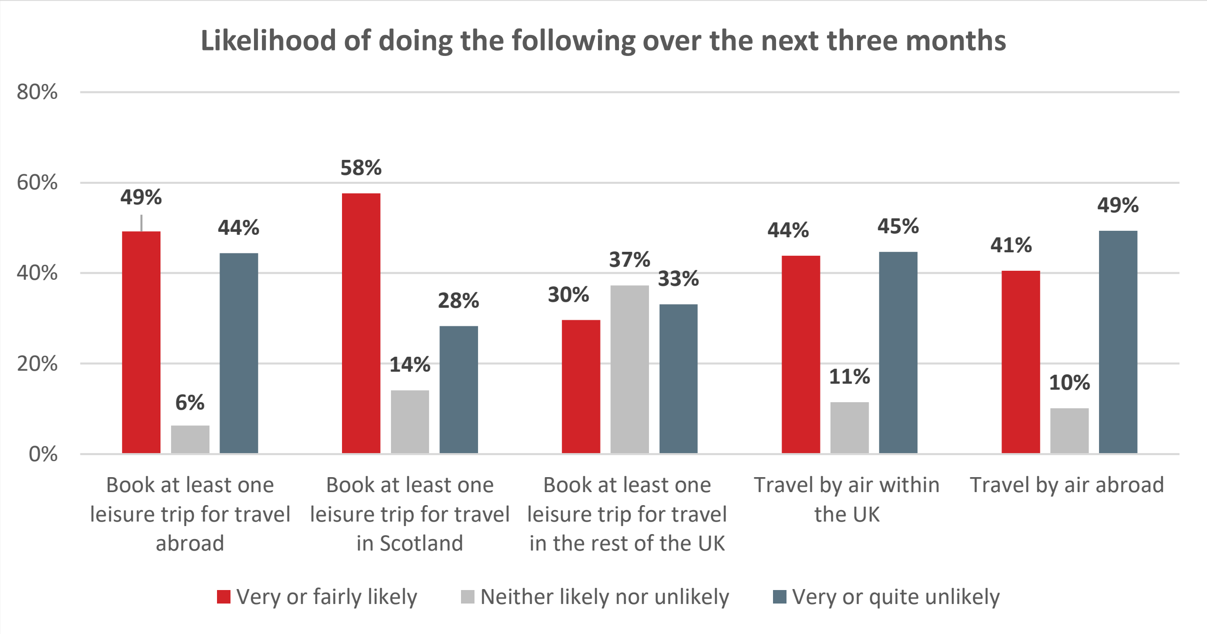
4.1.2 The majority of these respondents expect that they will maintain these reported increased levels once Covid-19 restrictions are lifted, mainly for walking (93%) and cycling (89%) for leisure/exercise purposes.

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 go to indoor leisure activities (76%) or outdoor leisure activities (70%), or to drop off their child to school (70%).. Notably, around a quarter (28%) anticipated an increase in travelling to visit family and friends, while a quarter (25%) anticipated a decrease in travelling to work or to go shopping (21%) in the next two weeks.

4.2.2 Over half (58%) thought it likely that they would book a leisure trip for travel in Scotland in the next three months, and three in ten (30%) thought that they would book a trip in the rest of the UK. Around half (49%) thought that they would book a trip abroad. Respondents from Aberdeen City were more likely to report that they would be twice as likely to book a leisure trip abroad in the next three months compared to those from Aberdeenshire (61% vs 30%).

4.2.3 These findings are similar to Wave 13.



Base: All respondents, excluding those who answered 'Don't know' [300-303]

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

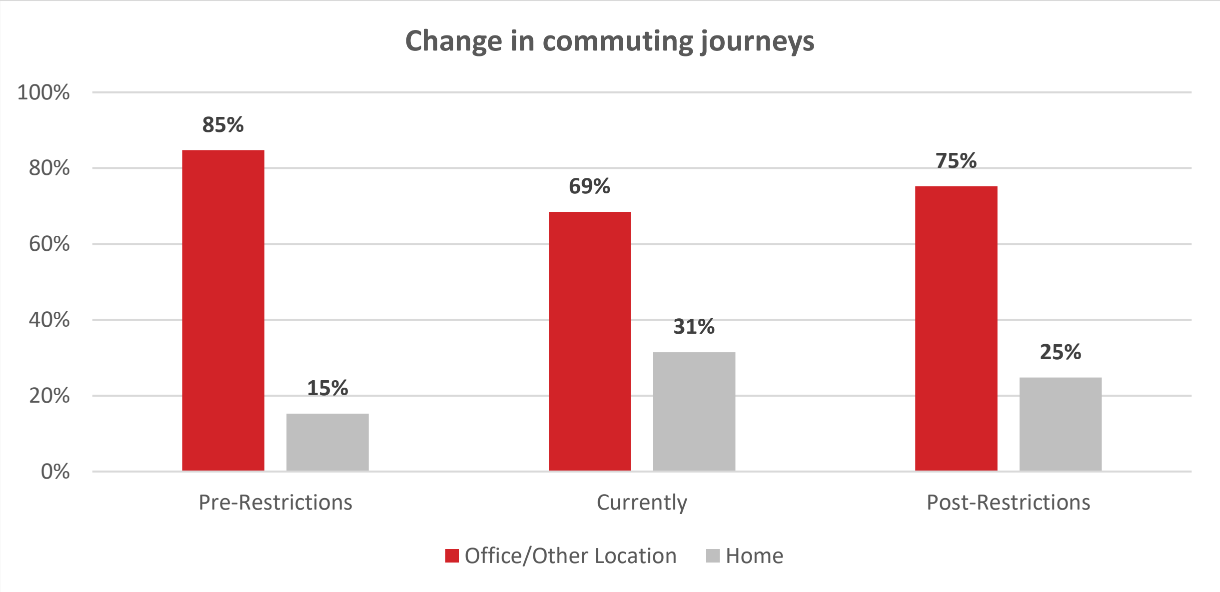
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting trips

5.1.1 Of the 73% of respondents who reported that they were working before Covid-19 restrictions, the majority (83%) were working full-time (i.e. five days a week or more) and around a sixth (17%) were working part-time.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) on 85% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 69% commuting on their working days, and respondents working from home on 31% of their working days. These findings are similar to Wave 13.

5.1.3 Once all restrictions are lifted, on average, respondents predict making commuting journeys on 75% of their working days. This is equivalent to an average reduction in commuting journeys of 10%, from before Covid-19 restrictions. This shows a further reduction in commuting journeys from Wave 13, where there was a 6% reduction in anticipated commuting journeys.



Base: Working respondents [216-223]

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), seven in ten of working respondents (70%) would like to work more flexibly, an increase from Wave 13 (54%). Specifically, around half would like to change the time of day that they start/finish (51%) and would like their hours to be more flexible generally (48%). Just one in ten (9%) would like to work the same hours over fewer days.

5.1.5 Around two thirds of working respondents (63%) suggested that it was very or quite likely that their employer would allow them to change their working times, while around a quarter (27%) suggested it was very or quite unlikely, and around a tenth (10%) did not know how likely it was.

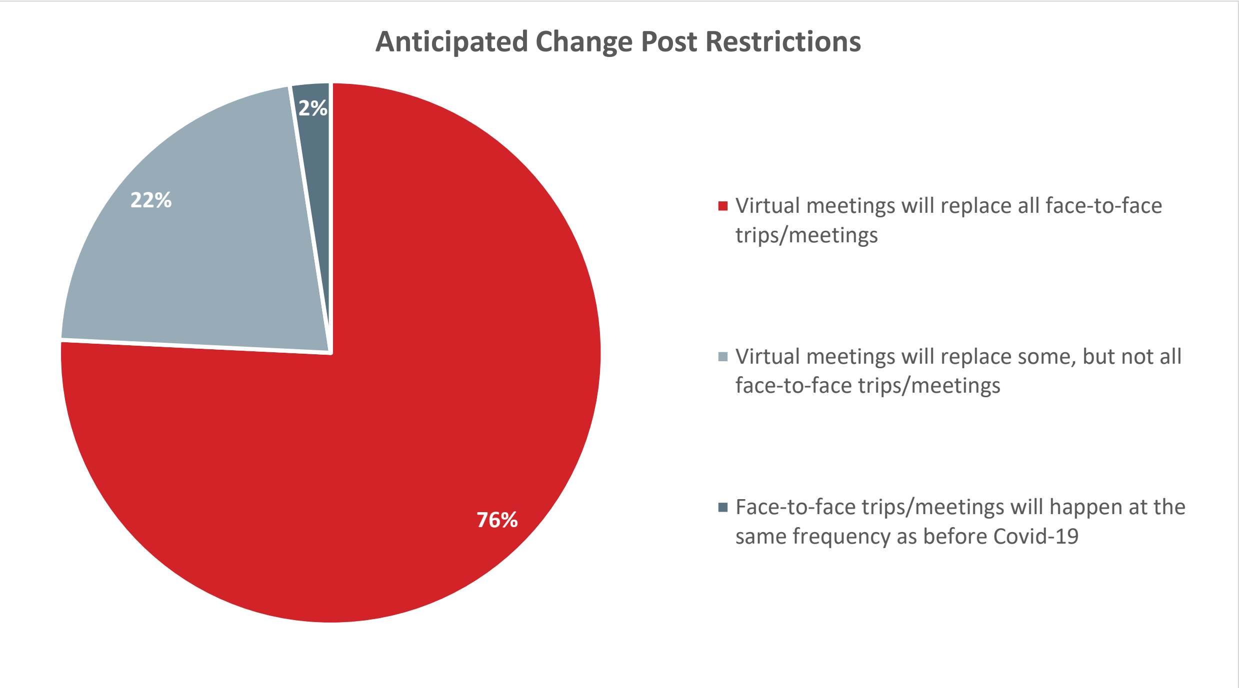
5.2 Commuting mode

5.2.1 A similar proportion of respondents expected 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 (71%) compared to before restrictions were in place (69%). Likewise, a similar proportion of respondents anticipated using public transport, a train or a bus, to travel to work once restrictions are lifted (17%), than before restrictions were in place (17% vs 13%).

5.3 Business trips

5.3.1 Before Covid-19 restrictions, around two thirds (65%) of working respondents took part in business meetings.

5.3.2 Almost all (98%) of working respondents who take part in business meetings expected that virtual meetings will replace some, or all, face to face business meetings in the longer term (such as a year from now). This is an increase from Wave 13.



Base: Working respondents who take part in business meetings, excluding those who answered 'Don't know' [146]

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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