08/02/2022

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

WAVE 15 REPORT (SURVEY UNDERTAKEN BETWEEN 10TH JANUARY AND 25TH JANUARY 2022)

nestrans

SYSTRA

NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

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IDENTIFICATION TABLE	
Project owner	Nestrans
Project	North East Transport Behaviour and Attitude Surveys
Study	Wave 15 Report (Survey undertaken between 10th January and 25th January 2022)
Type of document	Final Report
Date	08/02/2022
File name	20220208_Nestrans_Tracking Survey_W15 Final Report_vFinal.docx
Reference number	109975/13
Number of pages	15

APPROVAL

Version	Name		Position	Date	Modifications
1	Author	Emma Salter	Project Manager	27/01/2022	
	Checked by	Evelyn Robertson	Associate	28/01/2022	
	Approved by	Evelyn Robertson	Associate	31/01/2022	
2	Author	Emma Salter	Project Manager	08/02/2022	
	Checked by	Evelyn Robertson	Associate	08/02/2022	
	Approved by	Evelyn Robertson	Associate	08/02/2022	

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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 15 of 16 Waves. The data was collected between 10th January and 25th January 2022.

1.2.2 A total of 303 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 The protective Covid-19 measures at the start of the Wave 15 survey included[1]:

- Encouragement for individuals to get the vaccine or vaccine booster;
- 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;
- Social contact was limited to up to three households gathering at one time, with suggestions in place to avoid crowded places;
- Coronavirus vaccine certificates (passports) were required to attend some events;
- Employees were asked to work from home, where possible; and
- Some border control remained, relating to international travel.

1.2.5 From January 24th 2022, guidance was updated[2] to lift limits on social contact, re-open nightclubs and relax restrictions for indoor public events, hospitality and indoor sports.

[1] https://www.gov.scot/coronavirus-covid-19/
[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

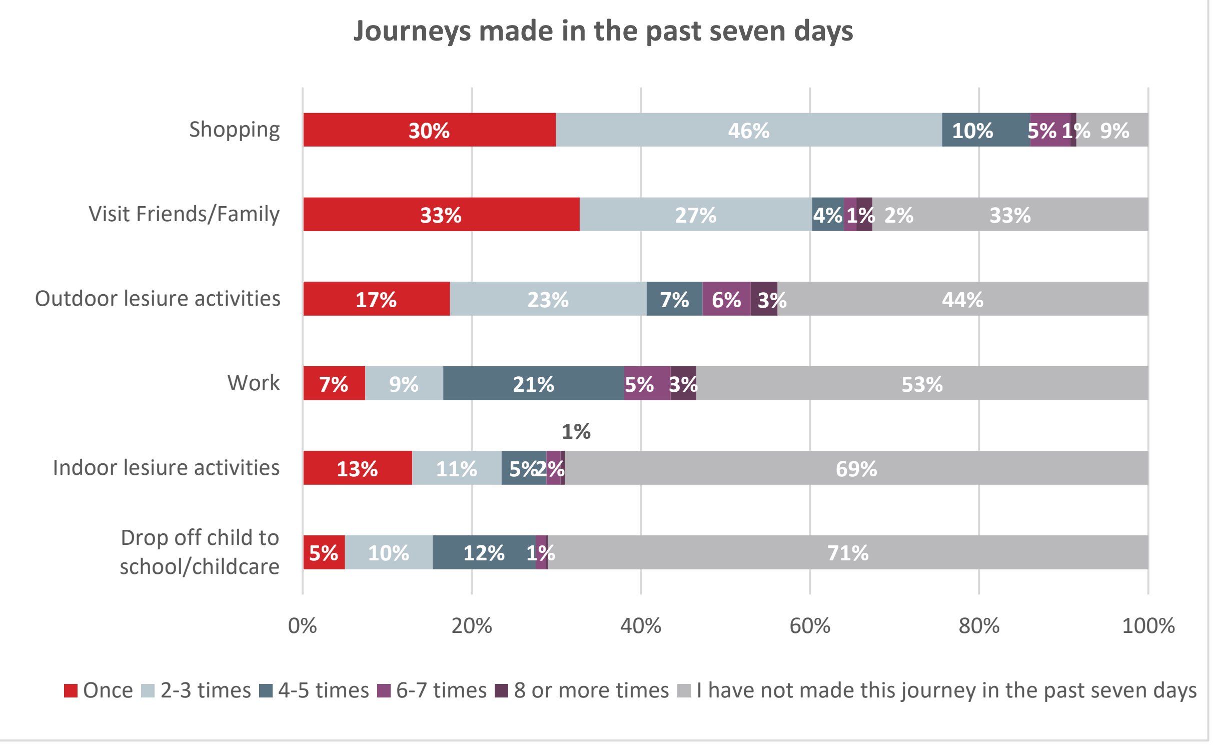
2.1.1 All respondents (100%) had made at least one journey in the last seven days.

2.1.2 In the past seven days, the most frequently made trip was for shopping, with nine in ten respondents (91%) having made this trip at least once, and three quarters (76%) having made this trip between one and three times.

2.1.3 Around seven in ten respondents (67%) 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 (56%) and around a third (31%) had travelled to indoor leisure activities, a decrease in the latter from Wave 14 (49%).

2.1.4 Respondents in urban areas were more likely to have travelled to indoor leisure activities in the last seven days than those in rural areas (37% compared with 23%).

2.1.5 Around half (47%) had travelled to work in the last seven days, a decrease from Wave 14 (64%), potentially due to changes in guidance to work from home. Just under a third (29%) had dropped off their child to school, nursery or childcare at least once in the last seven days, also a decrease from Wave 14 (45%), likely reflecting the end of the holiday period.



Base: All respondents [303]

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 journeys at about the same frequency. Specifically, half or more of respondents felt that they would have travelled at about the same frequency to:

- Go shopping (60%);
- Travel to outdoor leisure activities (53%); and
- Visit friends and relatives (47%).

2.1.7 Two fifths or fewer respondents felt that they would have travelled at about the same frequency for travel to:

- Indoor leisure activities (40%);
- Work (36%); and
- To drop off children to school or nursery (31%).

2.1.8 This compares similarly to the previous wave.

2.1.9 Respondents from Aberdeen City were more likely than those from Aberdeenshire to predict that they would have travelled more often to indoor leisure activities (39% compared with 27%). A similar difference was also found across urban and rural areas (37% and 27%).

2.1.10 In addition, respondents from urban areas were more likely than those from rural areas to report that they would have travelled to drop off their child at school or nursery at about the same frequency if the Covid-19 pandemic had never happened (32% compared with 29%).

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 (45%-76%).

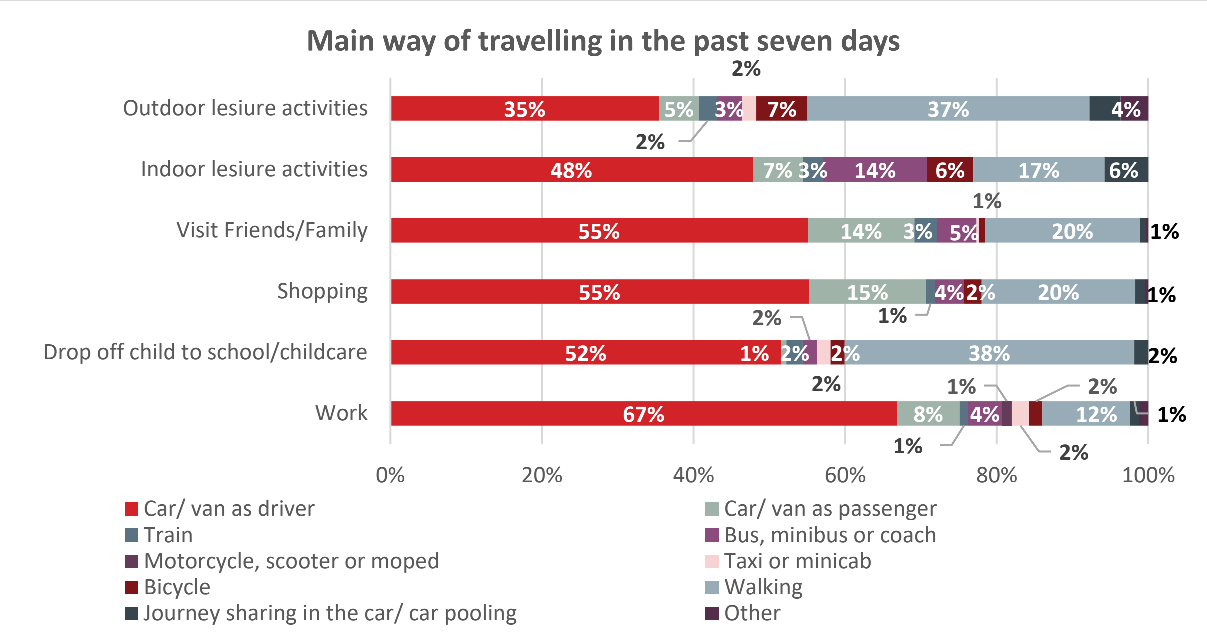
2.2.2 Respondents from Aberdeenshire were more likely than those from Aberdeen City to report mainly travelling by car, van, carpooling or motorbike for travel to:

- Go shopping (84% compared with 63%); and
- Visit friends and relatives (79% compared with 63%).

2.2.3 Similarly, respondents from rural areas were more likely than those from urban areas to report mainly travelling by car, van, carpooling or motorbike for travel to go shopping (83% compared with 65%).

2.2.4 By way of contrast, respondents from urban areas were more likely than those from rural areas to report mainly travelling by car, van, carpooling or motorbike for travel to work (85% compared with 68%).

2.2.5 Two fifths of respondents mainly walked to drop off their child at school / nursery (38%) or to travel to outdoor leisure activities (37%). A fifth walked to visit friends and family and to go shopping (both 20%). Between 12%-17% reported walking as their main way of travelling for the remaining journey types, an increase seen from previous waves.



Base: Respondents who had undertaken a journey in the last seven days [88-303]

Figure 2. In the past seven days, which way have you travelled most often?

2.3 Changes in current behaviour

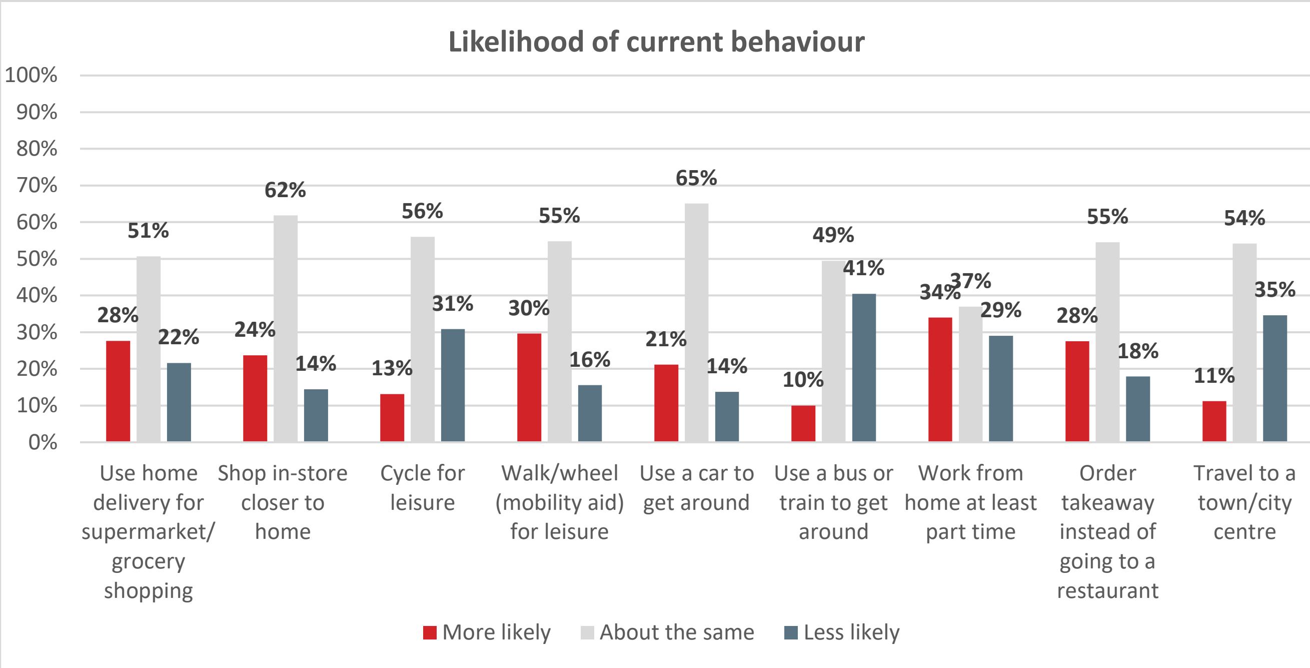
2.3.1 Respondents have continued to report changes to the way they shop, compared to before Covid-19 travel restrictions were put in place. Around a quarter reported that they were more likely to use home delivery for supermarket shopping than before restrictions were put in place (28%), or that they were more likely to shop in-store closer to home (24%). This is a decrease from Wave 14.

2.3.2 Just under a third (30%) 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 (16%). In contrast, around a tenth of respondents reported that they are more likely to cycle for leisure or exercise purposes (13%), a much lower proportion than those who stated they are less likely to (31%), and a lower proportion than in Wave 14 (22%).

2.3.3 Two fifths of 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, an increase from Wave 14 (34%).

2.3.4 Two thirds of respondents felt that there was no change in their use of a car to get around now, compared to before Covid-19 restrictions (65%), and a fifth felt that they were more likely to use their car (21%), potentially explaining some of the decrease in use of public transport, outlined above.

2.3.5 Respondents from rural areas were more likely than those from urban areas to report no change in their car use (70% compared with 62%).



Base: All respondents excluding those who answered 'Don't know' [264-293]

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?

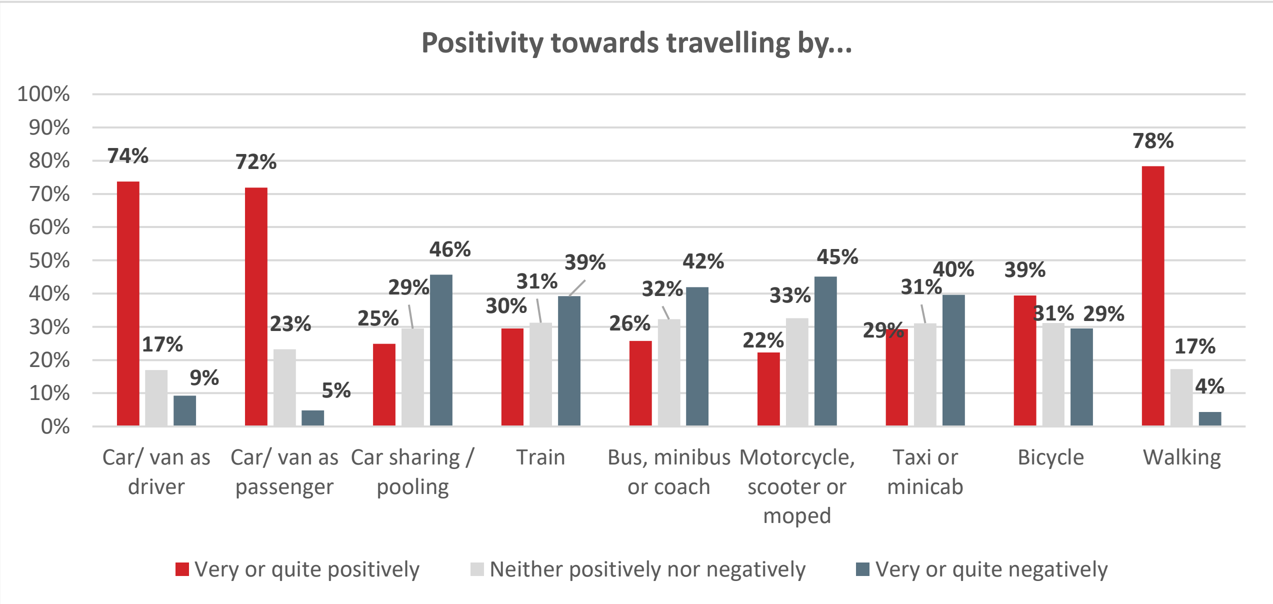
3. FEELINGS TOWARDS DIFFERENT WAYS OF TRAVELLING

3.1 Positivity and negativity towards travelling by different methods

3.1.1 Around eight in ten (78%) felt positively towards walking, while two fifths (39%) felt this way towards travelling by bicycle, which is a slight change since Wave 14 (71% and 45% respectively).

3.1.2 Around three quarters of respondents reported that they felt positively towards travelling by car or van as a driver (74%) or as a passenger (72%), while a quarter (25%) felt positively towards car sharing/pooling. These findings are similar to Wave 14.

3.1.3 In line with previous waves, more respondents reported feeling more negatively than positively towards travelling by train (39% vs 30%), by bus, minibus or coach (42% vs 26%), and by taxi or minicab (40% vs 29%). 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 than non-public transport users to report feeling positively towards train travel (37% compared with 23%) and bus travel (33% compared with 19%).



Base: All respondents excluding those who answered 'Don't know' [277-297]

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%);
- Concerns that social distancing may not be in place (42%);
- Cost/ too expensive (40%);
- Concern about overcrowding (39%); and

- Behaviour of other passengers (39%).

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

- Concern over catching coronavirus/other illness (48%);
- Behaviour of other passengers (45%);
- Travelling by car is easier / more convenient (43%);
- Concern about overcrowding (42%); and
- Concerns that social distancing may not be in place (41%).

3.2 Current safety concerns and measures

3.2.1 Between six and seven in ten respondents strongly or somewhat agree that they were concerned about people spreading or contracting the virus whilst using:

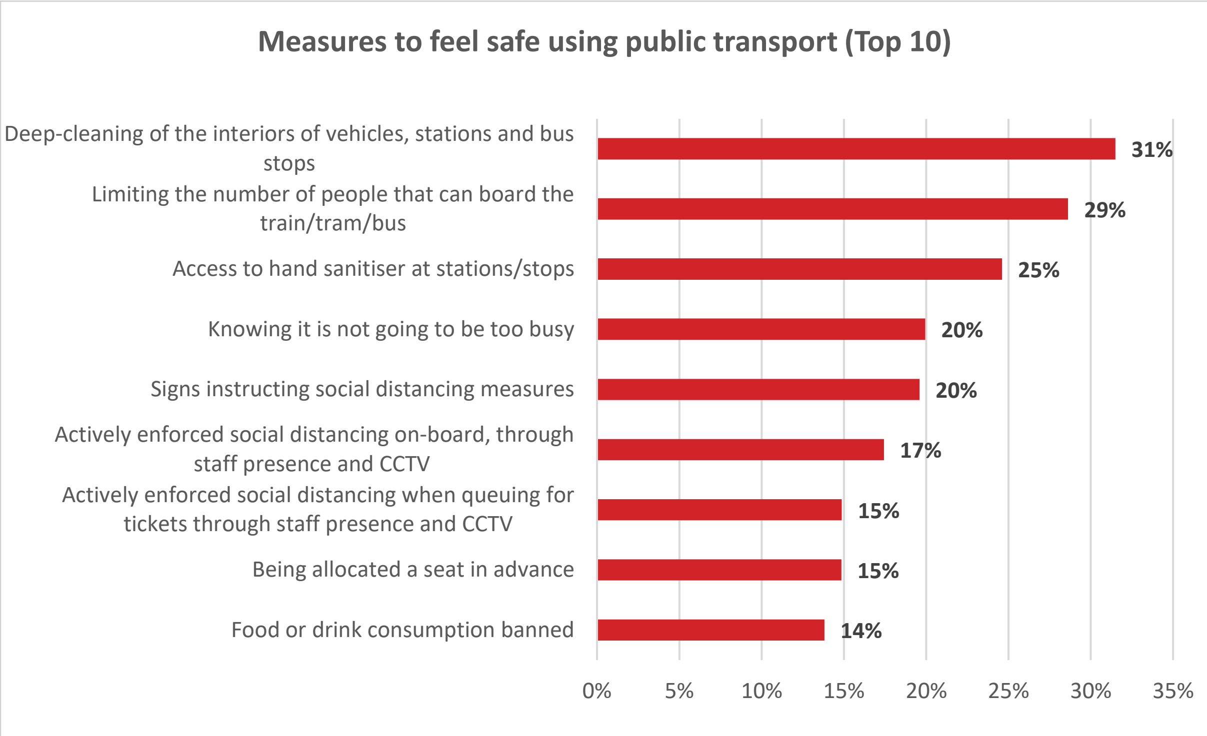
- Shared transport methods, including car clubs or car sharing (69%);
- Public transport (68%); and
- Taxis/minicabs (62%).

3.2.2 This is a decrease in concern across all modes since Wave 14.

3.2.3 Around seven in ten respondents agreed that the use of face coverings (69%) and social distancing (68%) makes them feel safer when using public transport. Around half (47%) were concerned that they will not be allowed to board a bus or train by the time it reaches them as it will be full. Again, these findings show a decrease compared to Wave 14.

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 (31%);
- Limiting the number of people that can board the train/tram/bus (29%);
- Access to hand sanitiser at stations/stops (25%);
- Knowing it is not going to be too busy (20%); and
- Signs instructing social distancing measures (20%).



Base: All respondents [303]

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 fifth (28%) suggested that they already felt safe using public transport, an increase from Wave 14 (22%). Less than a fifth (18%) 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

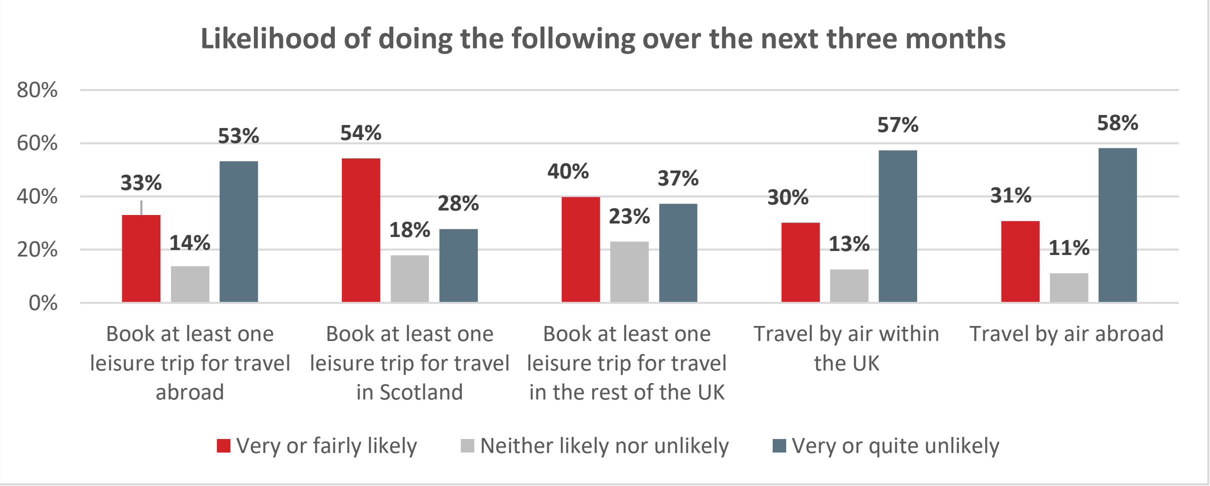
4.1.1 Since the Covid-19 restrictions, respondents reported an increase in their walking and cycling levels. The increase has primarily been for leisure/exercise purposes (43% and 23% for walking and cycling respectively). Walking and cycling have also been used to replace some journeys that normally would have been made another way (28% and 18% respectively), with respondents in Aberdeen City more likely than those in Aberdeenshire to report an increase in this walking behaviour (34% compared with 21%). This is a general increase compared to Wave 14, possibly a reflection of the time of year.

4.1.2 The majority of these respondents expected that they will maintain these reported increased levels once Covid-19 restrictions are lifted, mainly for walking leisure/exercise purposes (80%), and for cycling to replace a journey that normally would have been made another way (89%). Anticipation to maintain cycling for leisure/exercise (85%) and for commuting (84%) was also high.

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 for all journey purposes. Specifically, no changes were expected for travel to: Drop off their children at school or nursery (91%); Work (85%); Go shopping (83%); Indoor leisure activities (77%); Visit friends and family (76%); and Outdoor leisure activities (76%). This is a general increase compared to Wave 14.

4.2.2 Over half (54%) thought that they would book a leisure trip for travel in Scotland in the next three months. In addition, four in ten (40%) thought that they would book a trip in the rest of the UK, an increase from Wave 14 (30%) which could explain the decrease in respondents who thought that they travel abroad (33% compared to 40% in Wave 14).



Base: All respondents, excluding those who answered ‘Don’t know’ [285-393]

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

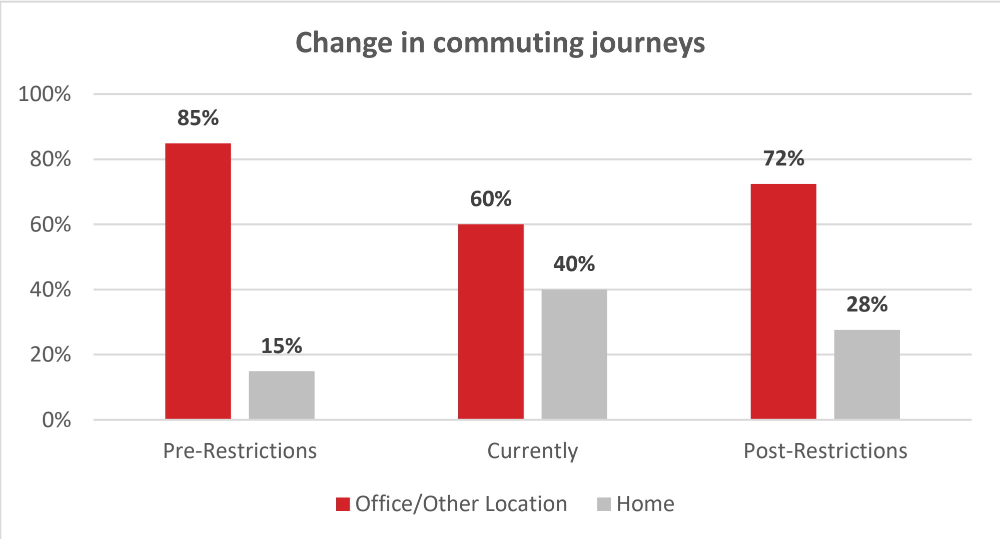
5. COMMUTE AND BUSINESS TRIPS

5.1 Commuting trips

5.1.1 Of the 65% of respondents who reported that they were working before Covid-19 restrictions, the majority (71%) were working full-time (i.e. five days a week or more) and around a sixth (29%) were working part-time. This is a general reduction in respondents working since Wave 14 (73%), as well as an increase in those reporting working part-time (17% in Wave 14).

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 60% commuting on their working days, and respondents working from home on 40% of their working days. This is a slight increase in home working since Wave 14 (31%).

5.1.3 Once all restrictions are lifted, on average, respondents predict making commuting journeys on 72% of their working days. This is equivalent to an average reduction in commuting journeys of 13%, from before Covid-19 restrictions, a further reduction from Wave 14.



Base: Working respondents [285-196]

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 working respondents (46%) would like to work more flexibly, a decrease from Wave 14 (70%). Specifically, around a quarter would like to change the time of day that they start/finish (22%) and would like their hours to be more flexible generally (24%). One in ten (11%) would like to work the same hours over fewer days.

5.1.5 Around two fifths of working respondents (42%) suggested that it was very or quite likely that their employer would allow them to change their working times, while around a third

(35%) suggested it was very or quite unlikely, and around a quarter (23%) did not know how likely it was.

5.1.6 These findings are different from previous waves, and could potentially be due to the difference in those working part-time compared to full-time, in comparison. Alternatively, respondents may be working as flexibly as they want to now.

5.2 Commuting mode

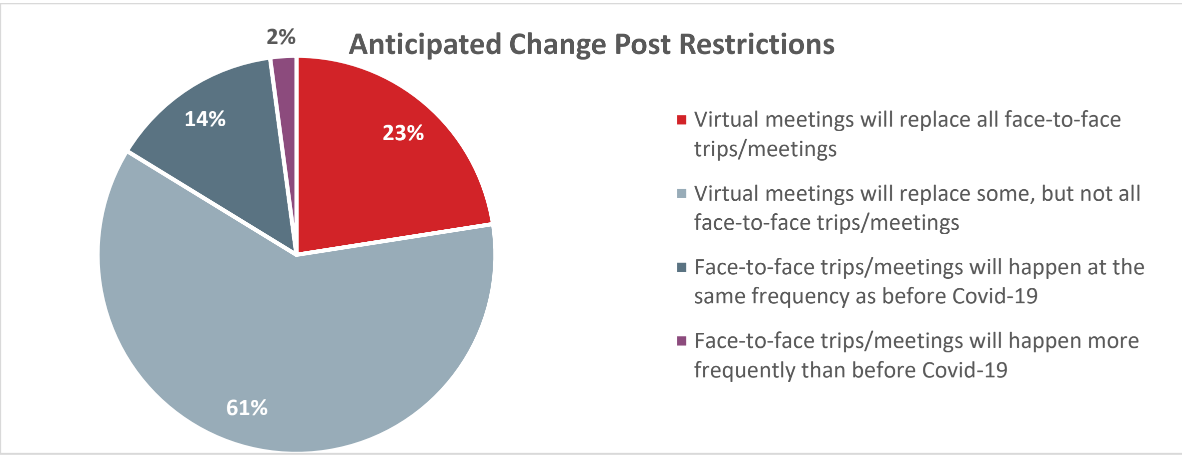
5.2.1 A higher proportion of respondents expected to mainly travel to work by car or van as either a passenger or driver, by motorbike, or by car sharing/pooling once restrictions are lifted, compared to before restrictions were in place (78% vs 65%), in line with Wave 14.

5.2.2 Respondents anticipated using public transport, a train or a bus, as their main way of travelling post restrictions less than before restrictions were in place (7% vs 11%), with an overall decrease compared to Wave 14.

5.3 Business trips

5.3.1 Before Covid-19 restrictions, around two fifths (42%) of working respondents took part in business meetings. This is a large reduction from Wave 14, where two thirds of working respondents took part in business meetings (65%). This difference could potentially be due to the difference in those working part-time compared to full-time, in comparison to the previous wave.

5.3.2 Almost all (84%) 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' [76]

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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