# NORTH EAST TRANSPORT BEHAVIOUR AND ATTITUDE SURVEYS

## WAVE 16 REPORT (SURVEY UNDERTAKEN BETWEEN 21ST FEBRUARY AND 8TH MARCH 2022)

nestrans

SYSTRA

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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 16 of 16 Waves. The data was collected between 21st February and 8th March 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; 49% of respondents were from Aberdeenshire and 51% 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 16 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;
- A mixture of home and office working was allowed; and
- Some guidance on international travel remained.

1.2.5 On February 22nd 2022, a staged approach to easing protective measures[2] was announced, with removal of vaccine certificates introduced from Monday 28th February 2022.

[1] https://www.gov.scot/coronavirus-covid-19/
[2] https://www.gov.scot/news/living-safely-with-covid/

# 2. JOURNEYS IN THE LAST SEVEN DAYS

## 2.1 Frequency of journeys

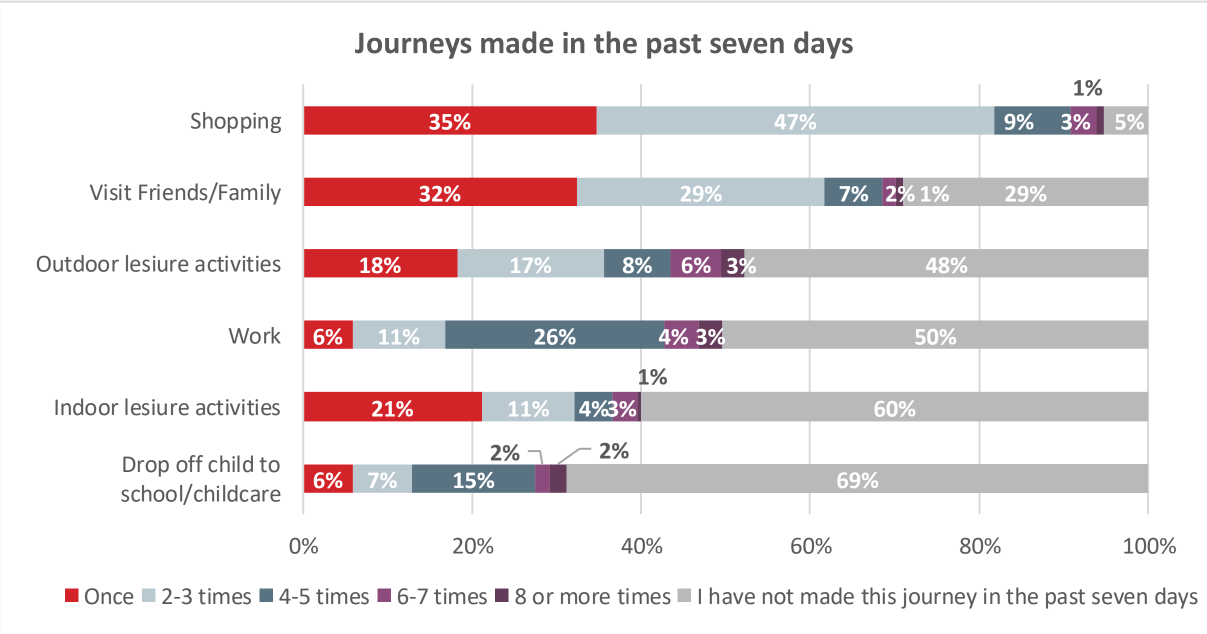
2.1.1 All respondents (100%) had made at least one journey in the last seven days.

2.1.2 In the past seven days, the most frequently made trip was for shopping, with the majority of respondents (95%) having made this trip at least once, and four fifths (82%) having made this trip between one and three times.

2.1.3 Around seven in ten respondents (71%) reported travelling to visit family and friends at least once in the last seven days. Around half made trips to outdoor leisure activities (52%) and two fifths (40%) had travelled to indoor leisure activities, an increase in the latter from Wave 15 (31%).

2.1.4 Half (50%) of respondents had travelled to work in the last seven days, similar with Wave 15 (47%). Just under a third (31%) had dropped off their child to school, nursery or childcare at least once in the last seven days.

2.1.5 Respondents in urban areas were more likely than those in rural areas to have travelled to drop off children to school or nursery (40% compared with 20%), visit friends and relatives (72% compared with 69%), and take part in indoor leisure activities (50% compared with 27%). In addition, respondents from Aberdeen City were more likely than those from Aberdeenshire to have travelled to indoor leisure activities (49% compared with 31%).




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 (68%);
- Travel to outdoor leisure activities (56%); and
- Visit friends and relatives (51%).

2.1.7 Fewer than half of respondents felt that they would have travelled at about the same frequency for travel to:

- Indoor leisure activities (44%);
- Work (44%); and
- Drop off children to school or nursery (29%); in fact, just over half would not have made this journey (58%).

2.1.8 This compares similarly to the previous wave.

2.1.9 If the Covid-19 pandemic had never happened, respondents from urban areas were more likely than those from rural areas to anticipate travelling at about the same frequency to work (50% compared with 36%), to drop off their child at school or nursery at (34% compared with 22%), and to take part in indoor leisure activities (50% compared with 36%).

## 2.2 Ways of travelling

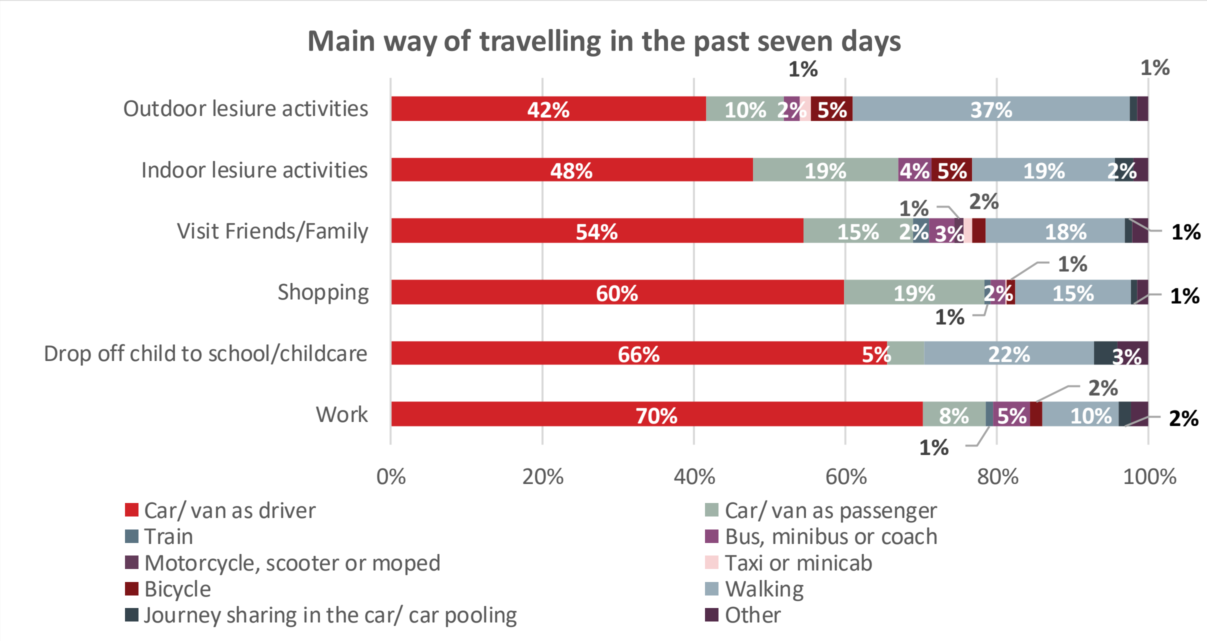
2.2.1 Similar to previous waves, travelling by car, as a driver or passenger or by carpooling/sharing, was most frequently cited as the main way of travelling, for all journey types in the last seven days (53%-80%).

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 visit friends and relatives (78% compared with 67%). 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 visit friends and relatives (81% compared with 67%).

2.2.3 Similarly to Wave 15, two fifths of respondents mainly walked to travel to outdoor leisure activities (37%).

2.2.4 Around a fifth of respondents or fewer walked to:

- Drop off children to school or nursery (22%) – a decrease from Wave 15 (38%);
- Travel to indoor leisure activities (19%);
- Visit friends and family (18%);
- Go shopping (15%) – a decrease from Wave 15 (20%); and
- Work (10%).




Base: Respondents who had undertaken a journey in the last seven days [95-287]

**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 (31%). This is similar to Wave 15.

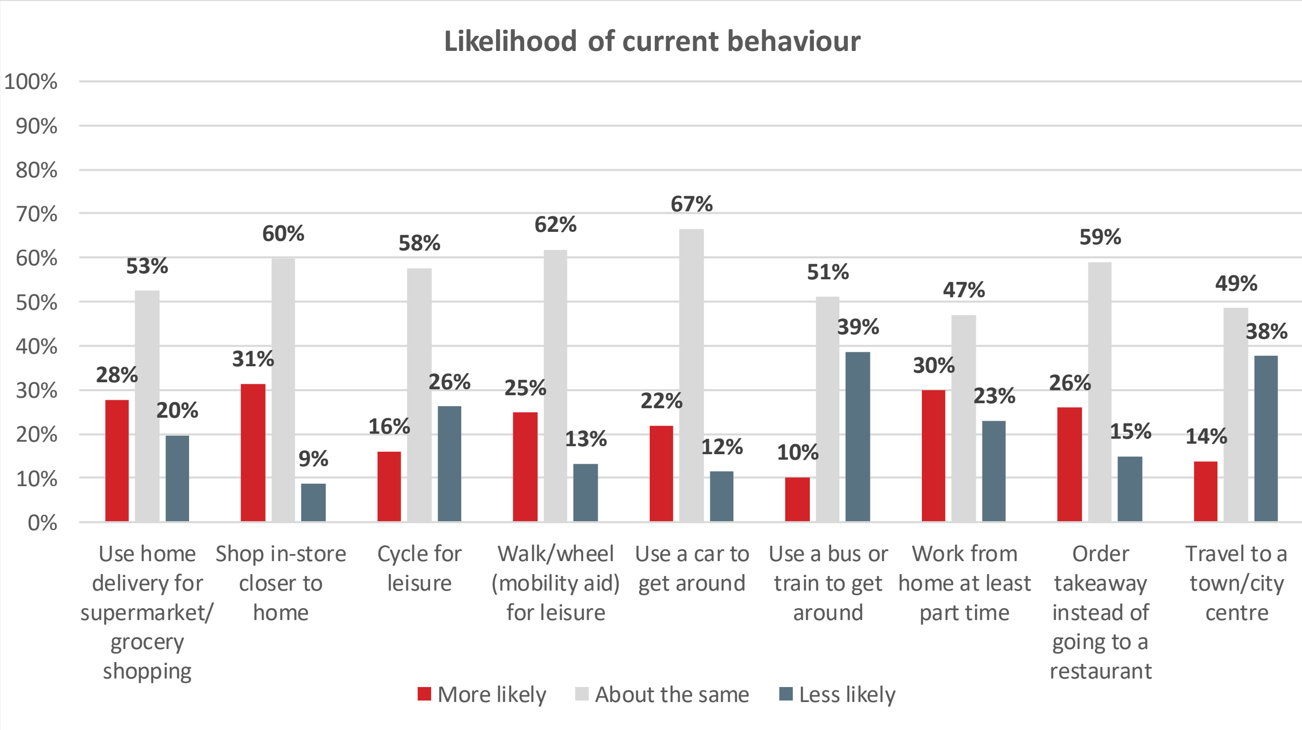
2.3.2 A quarter (25%) of respondents reported that they are more likely to walk for leisure now compared to before the pandemic, a higher proportion than those who say they are less likely (13%), but a slight decrease from Wave 15 (30%).

2.3.3 In contrast, around a fifth of respondents reported that they are more likely to cycle for leisure or exercise purposes (16%), a much lower proportion than those who stated they are less likely to (26%).

2.3.4 Two fifths of respondents (39%) 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, a similar finding to Wave 15 (41%).

2.3.5 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 (67%), and a fifth felt that they were more likely to use their car (22%), potentially explaining some of the decrease in use of public transport, outlined above.

2.3.6 Respondents from rural areas were more likely than those from urban areas to report a change in how often they travel to a town or city centre (60% compared with 45%).




Base: All respondents excluding those who answered 'Don't know' [258-292]

**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

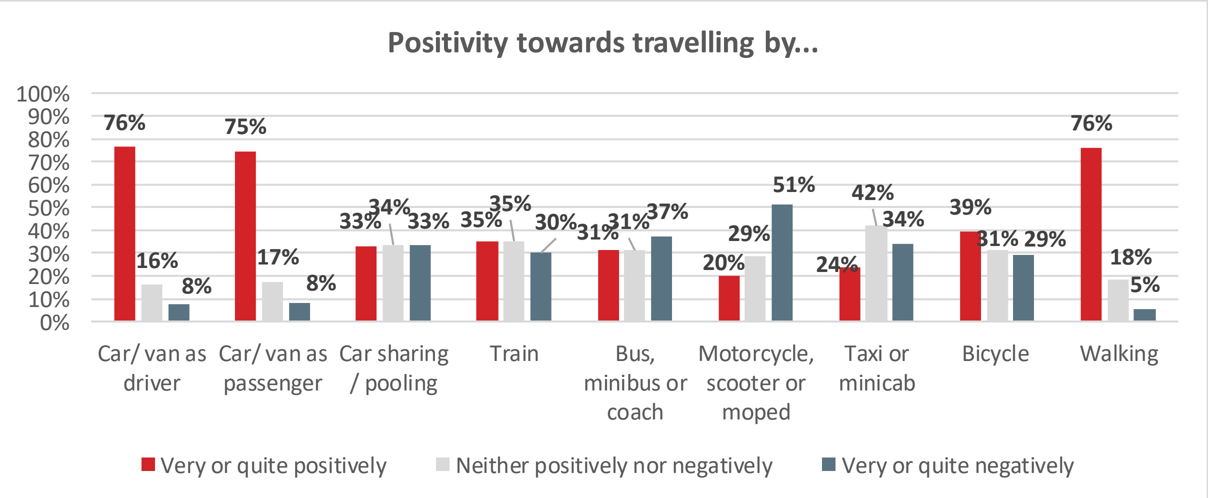
3.1.1 Around three quarters of respondents (76%) felt positively towards walking, while two fifths (39%) felt this way towards travelling by bicycle, consistent with Wave 15 (78% and 39% respectively).

3.1.2 Around three quarters of respondents reported that they felt positively towards travelling by car or van as a driver (76%) or as a passenger (75%), while a third (33%) felt positively towards car sharing/pooling. These findings are similar to Wave 15, with an increase in respondents feeling positively towards car sharing/pooling (25% in Wave 15).

3.1.3 In line with previous waves, more respondents reported feeling negatively than positively towards travelling by bus, minibus or coach (37% vs 31%), and by taxi or minicab (34% vs 24%). It should be noted that the percentage difference between these differing sentiments was less evident compared to previous waves. In contrast to previous waves, a high proportion of respondents reported feeling positively than negatively towards travelling by train (35% vs 30%; compared with Wave 15 – 30% vs 39%).

3.1.4 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 (47% compared with 26%) and bus travel (45% compared with 21%).

3.1.5 Those in urban areas were also more likely than those in rural areas to feel positively towards travel by taxi or minicab (28% compared with 18%). Similarly, respondents from Aberdeen City were more likely than respondents from Aberdeenshire to feel positively towards travel by taxi or minicab (28% compared with 20%) and car sharing/pooling (37% compared with 30%).




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

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

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

- Travelling by car is easier/more convenient (57%);
- Concern about overcrowding (45%);
- Frequency of service (39%);
- Takes too long (39%); and
- Concern over catching Covid-19/other illness (38%).

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

- Concern about overcrowding (54%);
- Cost/too expensive (52%);
- Travelling by car is easier/more convenient (46%);
- Concern over catching Covid-19/other illness (45%); and
- Behaviour of other passengers (41%).

3.1.8 The above reasons are a change from previous waves, where the main concerns tended to be catching Covid-19/other illnesses, in addition to the behaviour of other passengers, social distancing and overcrowding.

## 3.2 Current safety concerns and measures

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

- Public transport (62%);
- Taxis/minicabs (57%); and
- Shared transport methods, including car clubs or car sharing (55%).

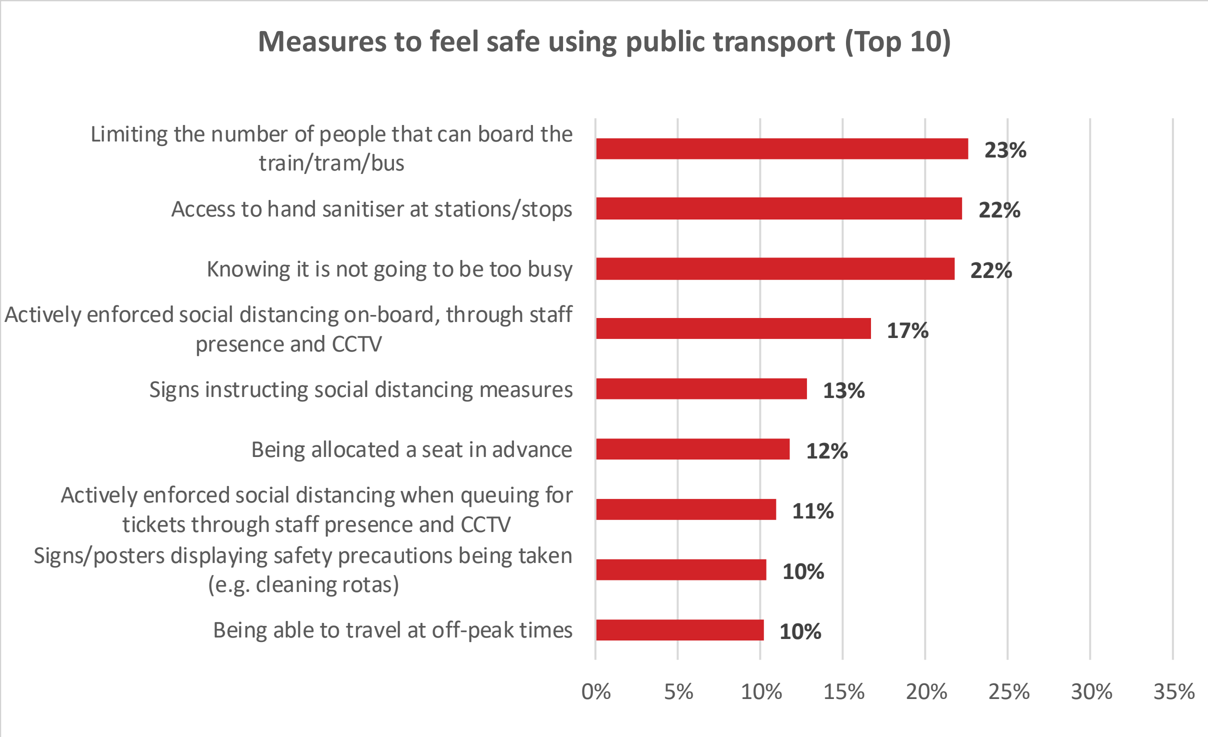
3.2.2 This is a decrease in concern across all modes since Wave 15.

3.2.3 Around seven in ten respondents agreed that the use of face coverings (69%) and social distancing (69%) makes them feel safer when using public transport. Two fifths (43%) 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. These findings are consistent with Wave 15.

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 (23%);
- Limiting the number of people that can board the train/tram/bus (23%);
- Access to hand sanitiser at stations/stops (22%);
- Knowing it is not going to be too busy (22%); and

- Actively enforced social distancing on-board, through staff presence and CCTV (17%).




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 A third (33%) of respondents suggested that they already felt safe using public transport, an increase from Wave 15 (28%). Less than a fifth (19%) 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

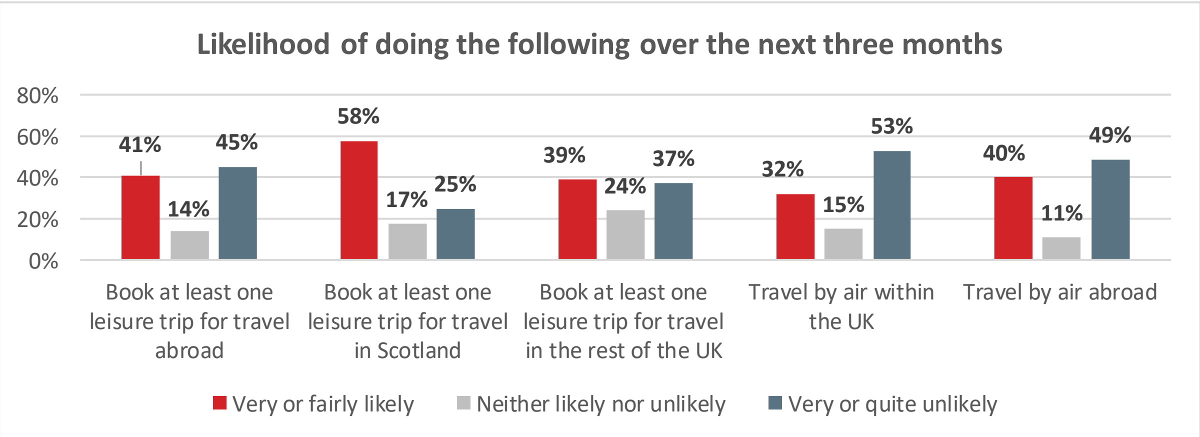
4.1.1 Since the Covid-19 restrictions, respondents reported an increase in their walking and cycling levels. The increase has primarily been for leisure/exercise purposes (48% and 30% for walking and cycling respectively), and respondents in Aberdeenshire were more likely than those in Aberdeen City to report an increase in their walking for leisure/exercise purposes (54% compared with 41%). Walking and cycling have also been used to replace some journeys that normally would have been made another way (26% and 25% respectively). This is a general increase compared to Wave 15, 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 (78%), and for cycling for leisure/exercise (85%).

## 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 (88%); Work (83%); Go shopping (82%); Indoor leisure activities (82%); Outdoor leisure activities (80%); and Visit friends and family (76%). This is in line with Wave 15.

4.2.2 Over half (58%) thought that they would book a leisure trip for travel in Scotland in the next three months, and two fifths thought they would book at least one leisure trip for travel in the rest of the UK (39%); both of these findings are in line with Wave 15. In contrast to Wave 15, more respondents thought they would book at least one leisure trip for travel abroad (41% compared with 33% in Wave 15), or that they would travel by air for travel abroad (41% compared with 31%).




Base: All respondents, excluding those who answered 'Don't know' [292-296]

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

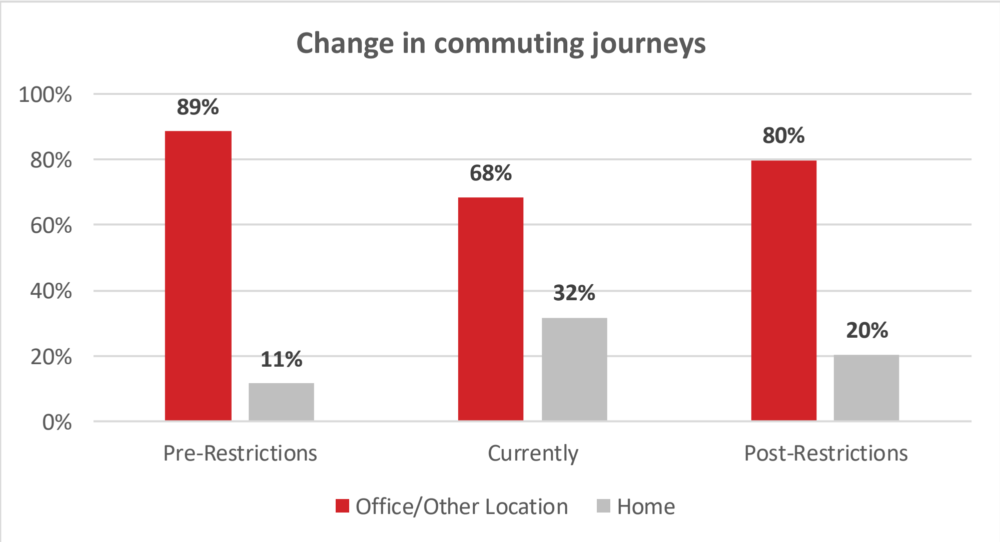
# 5. COMMUTE AND BUSINESS TRIPS

## 5.1 Commuting trips

5.1.1 Of the 65% of respondents who reported that they were working before Covid-19 restrictions, the majority (78%) were working full-time (i.e. five days a week or more) and around a fifth (22%) were working part-time. This is in line with Wave 15.

5.1.2 Respondents were making commuting journeys (i.e. not working from home) on 89% of their working days before the introduction of Covid-19 restrictions. Currently, this has decreased to 68% commuting on their working days, and respondents working from home on 32% of their working days. This is in line with Wave 15.

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 9%, from before Covid-19 restrictions, a smaller reduction than in Wave 15 (13%).




Base: Working respondents [175-196]

**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), half of working respondents (53%) would like to work more flexibly compared with how they worked before Covid-19, an increase from Wave 15 (46%). Specifically, around a quarter would like to be more flexible generally (24%), work the same hours over fewer days (24%), or change the time of day that they start/finish (22%).

5.1.5 Around two fifths of working respondents (37%) suggested that it was very or quite likely that their employer would allow them to change their working times, a similar proportion (44%) suggested it was very or quite unlikely, and around a fifth (19%) did not know how likely it was.

5.1.6 These findings are similar to Wave 15.

## 5.2 Commuting mode

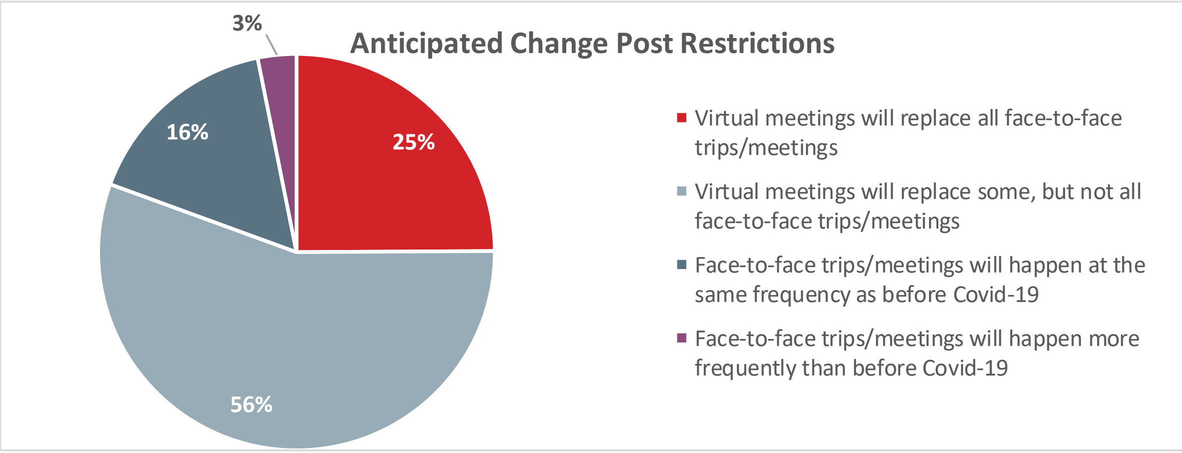
5.2.1 A higher proportion of respondents expected to mainly travel to work by car or van as either a passenger or driver, by motorbike, or by car sharing/pooling once restrictions are lifted, compared to before restrictions were in place (80% vs 77%), in line with Wave 15.

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 (6% vs 10%), in line with Wave 15.

## 5.3 Business trips

5.3.1 Before Covid-19 restrictions, around two fifths (41%) of working respondents took part in business meetings, in line with Wave 15.

5.3.2 Almost all (81%) 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' [77]

**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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