COVID19 Trends in Sub-National Travel

January Report

Monthly Change Headlines

- **January Travel Summary (4 January to 31 January)** – January has seen a general decrease in volumes across most modes of travel, with the exception of active travel and public transport modes in some areas, which may be due to a combination of many parts of the country still being under strict lockdown restrictions for the month as well as less favourable weather and colder conditions. There was a noticeable decline in activity around Edinburgh for most modes likely due to snowfall in the east of the country.
- **Active Travel** – Walking showed some growth whilst cycling volumes fell in most local authorities over the month of January, with the most notable change being in city or urbanised regions recording significant declines in cycling. Weather conditions and high COVID-19 Protection Level restrictions are likely to have contributed to the relatively low volumes observed.
- **Bus Concessionary Travel** – Bus concessionary travel recorded growth in January, increasing from 25% of 2020 levels during week ending 10 January to 28% of 2020 levels in week ending 31 January.
- **Rail Stations (Glasgow Central and Edinburgh Waverley)** – Glasgow Central and Edinburgh Waverley railway stations footfall was below levels observed over the equivalent 2019 and 2020 period, with 18% of typical activity recorded at Edinburgh Waverley, and 12% at Glasgow Central on average for the last week in January (WE 31).
- **Glasgow Subway and Edinburgh Trams** – Subway patronage increased while Tram decreased through January, with month on month changes of 17% and -22% respectively. Both remained well below baseline levels recorded in the equivalent 2019/2020 period at 6% (Trams) and 12% (Subway).
- **Ferries** – Month on month changes in ferries traffic saw significant regional variation for Passenger and Car traffic, with increases in some areas and declines in others. Commercial Vehicle volumes increased in all areas but ranged from 17% growth in Firth of Clyde to 67% growth on NorthLink routes. Passenger and Car volumes remained below equivalent 2019/20 levels in all areas and for Commercial Vehicles volumes in Outer Hebrides and Argyll and Lochaber. However, Commercial Vehicles volumes increased compared to the equivalent 2019/20 levels in Firth of Clyde and on NorthLink routes.
- **Trunk Road Traffic** – January traffic volumes declined month on month across most of the country. Where rare growth was observed this tended to be individual, mainly in the vicinity of urban areas. Compared to the March 2020 pre-COVID-19 baseline period, traffic generally remained below baseline levels. There is a decline in traffic volumes on all major trunk road corridors around Scotland.
- **Cross-Border Traffic** – On average over the month of January cross-border traffic decreased by 24% compared to December levels, lower than the national average decrease of 25%. Average traffic levels remained below those recorded in the equivalent 2019 and 2020 period.
- **Google Mobility Data** – Over January, Grocery and Pharmacy movements declined compared to the previous month, ranging between -15% and -25%. Parks movements saw significant regional variation of -8% to 9% across most areas, though Falkirk and Midlothian were clear outliers, with increases of 21% and 36% respectively. Retail and Recreation and Workplace activity declined in all areas on average over the month. With the exception of Parks, where some regions saw above baseline activity, mobility remains below baseline levels in each category. Average Mobility in the month of January was below baseline in all areas.

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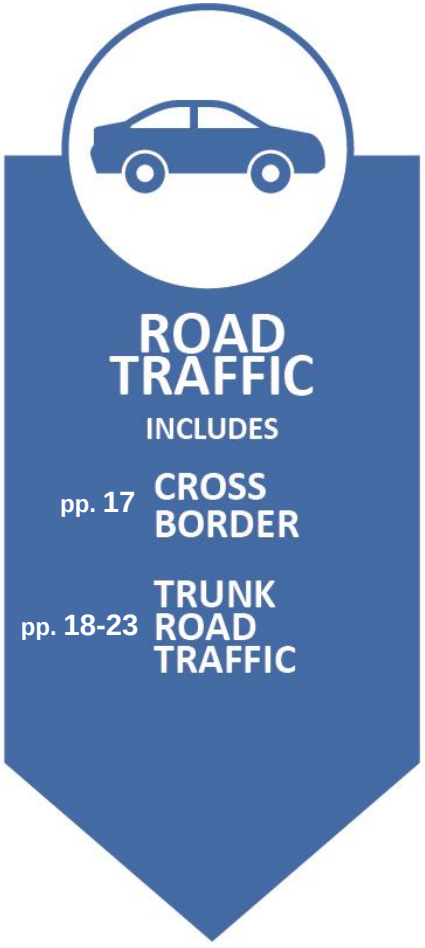
COVID19 Trends in Sub-National Travel

January Report

Monthly Report Contents



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Monthly Change Report Contents

COVID19 Trends in Sub-National Travel

January Report

ACTIVE TRAVEL Monthly Change (1)

City Local Authorities(3)	% Change(2)
Walking	-2% ↓
Cycling	-33% ↓

Rest of Scotland LA Average(4)	% Change(2)
Walking	10% ↑
Cycling	-4% ↓

(1) Monthly Change compares the whole of December (week ending 6 Dec to week ending 27 Dec) with the whole of January (week ending 10 Jan to week ending 31 Jan) due to the variability of movement data in each week of the months assessed

(2) Baseline comparison refers to December 2019 and January 2020

(3) City Local Authorities (LAs) includes Glasgow City and Edinburgh City

(4) Rest of Scotland Local Authorities includes Argyll and Bute, East Dunbartonshire, North Ayrshire, Perth and Kinross, and Stirling

Summary

- **Walking Trips** – From the sample data for walking, activity increased across most of the country in the month of January. The average monthly walking changes observed in Local Authorities ranged between 1% and 39%. Edinburgh and Stirling were the only authorities to record decreases in activity, -14% and -10% respectively, possibly influenced by snowfall in the east of the country. Levels of activity fluctuated throughout the month, likely influenced by less favourable weather conditions, prevailing colder temperatures and snowfall. Walking movements in Edinburgh and Glasgow were consistently lower than the equivalent 2019 and 2020 period. This was similarly the case in Stirling and Perth and Kinross (on average), whereas activity in other non-City Local Authorities was above baseline levels and significantly higher in some areas, particularly North Ayrshire and East Dunbartonshire.
- **Cycling Trips** – On average, cycling activity varied across all regions in January compared to December. The largest monthly growth was observed in Argyll and Bute (42%), with East Dunbartonshire and North Ayrshire also reporting increases. The largest decline was recorded in Edinburgh (-45%), closely followed by Perth and Kinross (-43%). Activity recorded in the more urbanised areas of Edinburgh, Stirling and Glasgow remained below baseline levels (December 2019 and January 2020) on average, but higher in the non-city Local Authorities for the same period. There was a notable drop in cycling activity from 18 January in Edinburgh, likely influenced by more prevalent snowfall in the east of the country.

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COVID19 Trends in Sub-National Travel

January Report

ACTIVE TRAVEL – Walking

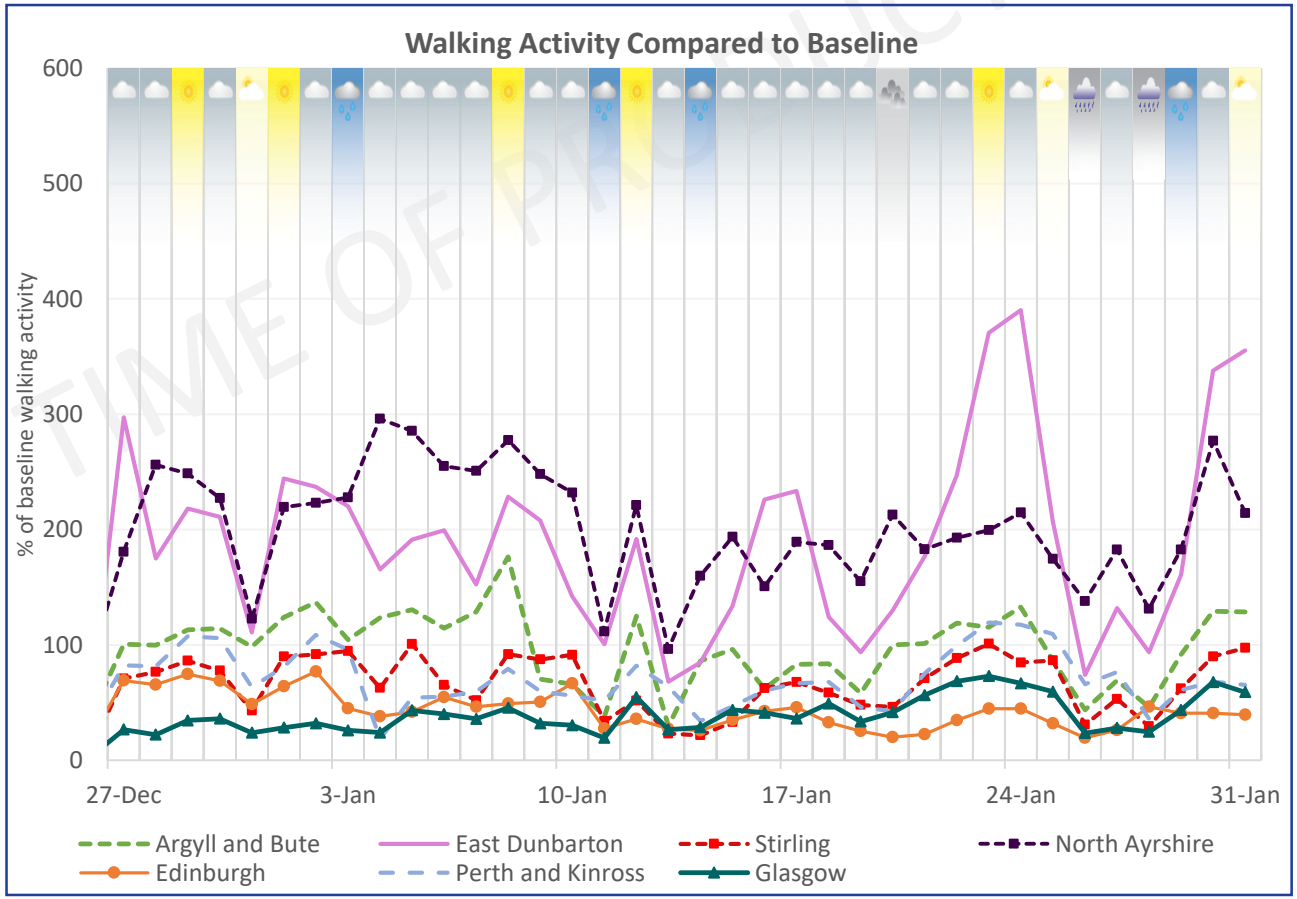
Key Points

- Most Local Authorities recorded an increase in walking activity comparing the month of January (3 to 31 Jan) with December (30 Nov to 27 Dec). However, decreases were recorded in Edinburgh and Stirling, with declines of 14% and 10% respectively. The largest growth in activity was recorded in East Dunbartonshire (39%), followed by North Ayrshire (38%), Glasgow (36%) and Perth and Kinross (12%), with Argyll and Bute largely unchanged (1%).
- Walking activity in January was higher than the equivalent period the previous year in North Ayrshire, East Dunbartonshire, and also Argyll and Bute at the start of the month. Activity in other areas was generally below baseline levels.
- Relatively significant fluctuations in activity were seen outside the major cities, particularly North Ayrshire and East Dunbartonshire. Volumes in Glasgow were the lowest compared to baseline of all areas through the end of December and start of January, however, Edinburgh was further below other authorities from mid January (18 Jan) onwards, possibly due to snowfall which was more prevalent in the east of the country.

Walking: Monthly Comparison

Source: Local Authorities and Cycling Scotland
Confidence: Medium

Baseline: Index 100 = December 2019 & January 2020



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COVID19 Trends in Sub-National Travel

January Report

ACTIVE TRAVEL – Walking Urban Rural Classification

Key Points

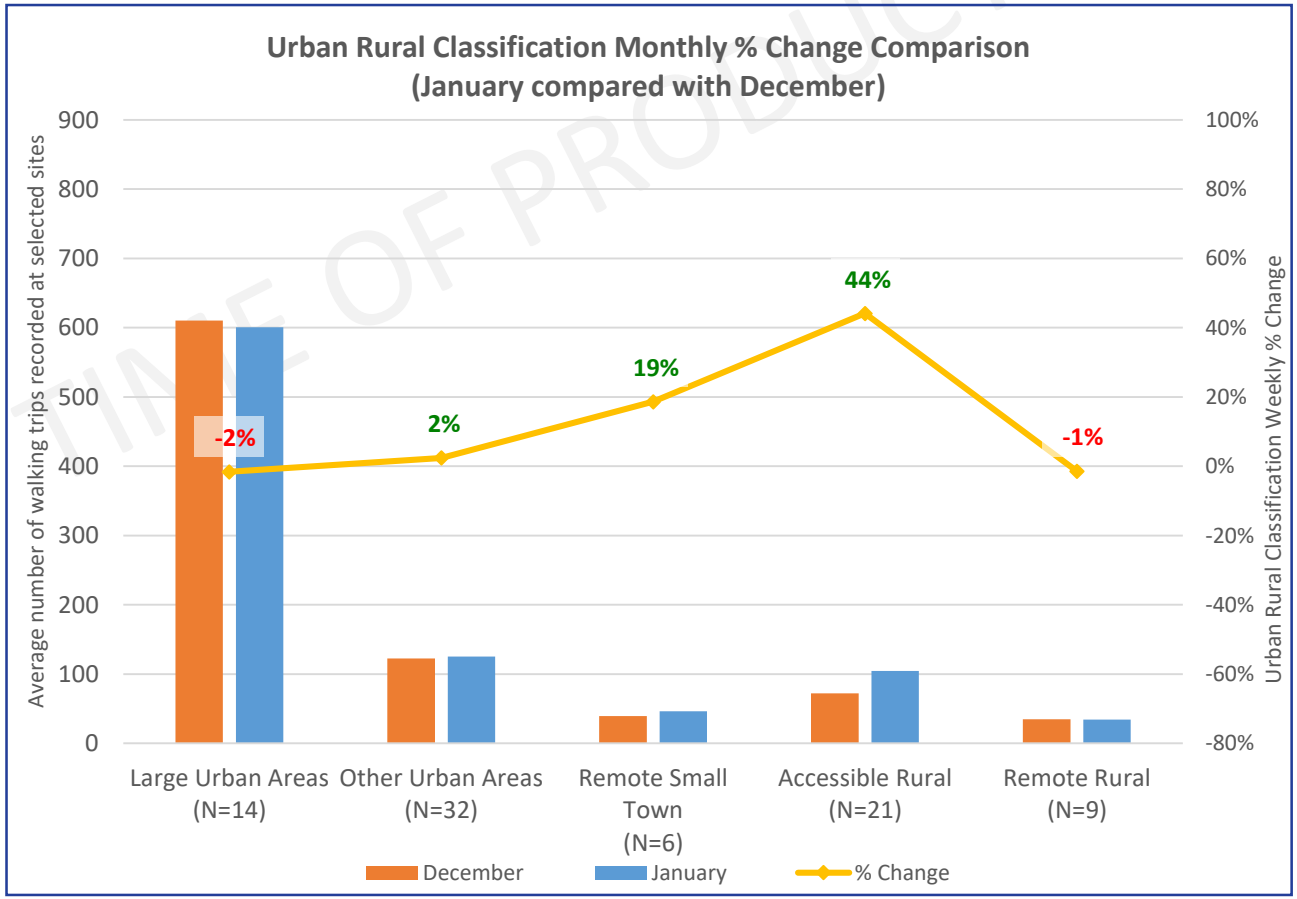
- Compared to the previous month, walking activity over January (4 to 31 Jan) period varied between urban, rural and remote regions.
- Activity in Accessible Rural locations recorded the largest change, with an average growth of 44% compared to December.
- Large Urban Areas saw an increase of 2% in activity whereas Other Urban Areas recorded a decrease of 2%.
- Remote Small Towns saw a significant increase of 19% while Remote Rural recorded minimal change with a 1% drop in activity.

DATA NOTE: Accessible Small Towns excluded as no count sites present. Average number of trips are calculated as per counter values for each category.

Walking: Urban Rural Walking Activity

Source: Local Authorities and Cycling Scotland
Confidence: Medium

Monthly Change Comparison



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COVID19 Trends in Sub-National Travel

January Report

ACTIVE TRAVEL – Cycling

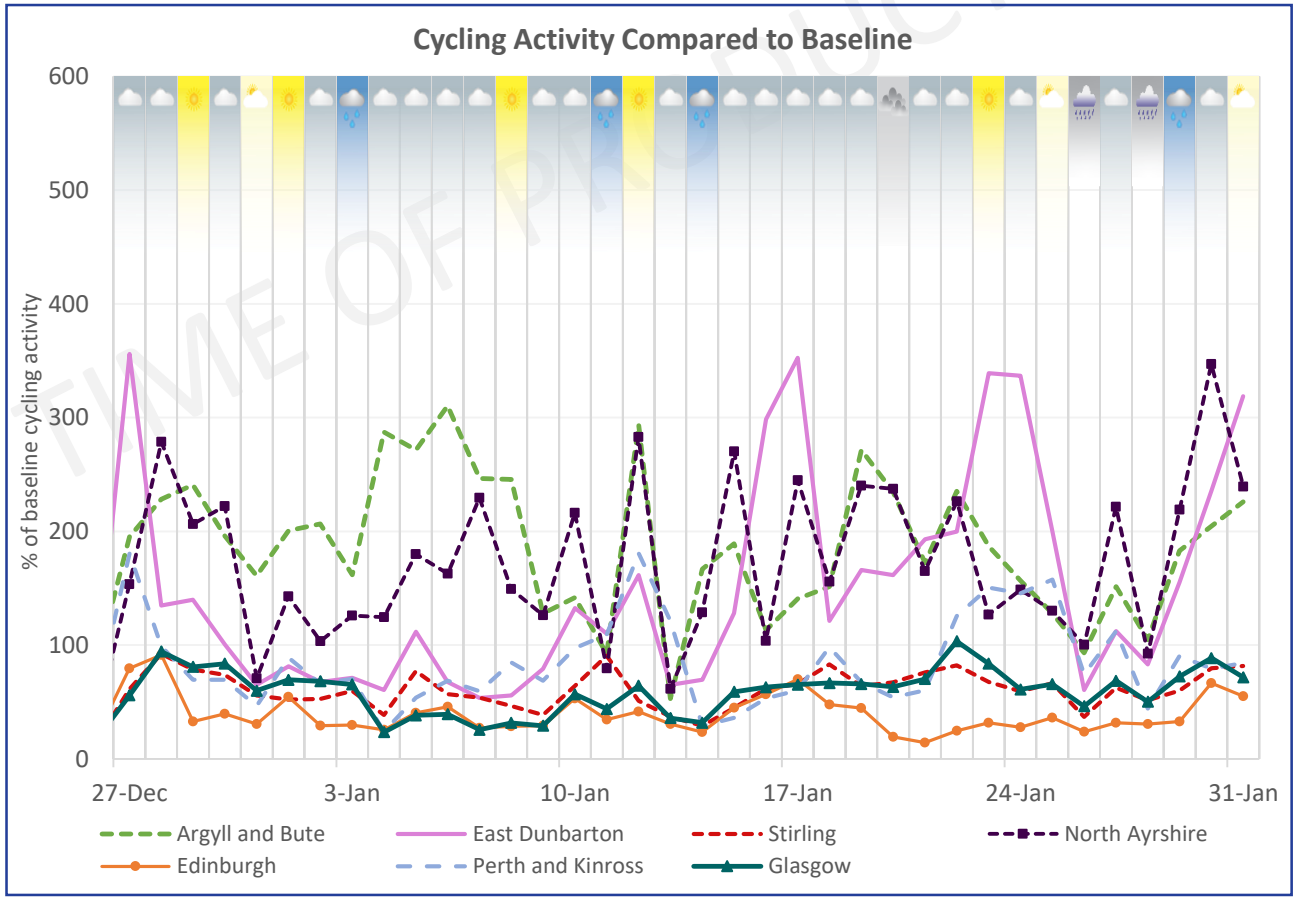
Key Points

- Cycling activity varied across Local Authorities in January (4 to 31 Jan) period compared to the previous month.
- Some non-city Local Authorities recorded increases including East Dunbartonshire (10%), North Ayrshire (8%) and most notably Argyll and Bute (42%).
- The greatest decline was recorded in Edinburgh, with a -46% decrease, and was similar to decline in Perth and Kinross (-43%). Both Glasgow and Stirling saw slightly lower declines of -15% and -21% respectively.
- North Ayrshire, East Dunbartonshire and Argyll and Bute recorded considerable fluctuations in cycling, which were generally significantly higher than baseline. Perth and Kinross generally remained below baseline volumes, though occasionally rose above baseline levels.
- In the more urbanised areas of Glasgow Edinburgh and Stirling, activity was below baseline levels on average over the period.
- Similar to walking, cycling activity in Edinburgh declined significantly towards the end of the month, possibly due to snowfall which was more prevalent in the east of the country.

Cycling: Monthly Comparison

Source: Local Authorities and Cycling Scotland
Confidence: Medium

Baseline: Index 100 = December 2019 & January 2020



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COVID19 Trends in Sub-National Travel

January Report

ACTIVE TRAVEL – Cycling Urban Rural Classification

Key Points

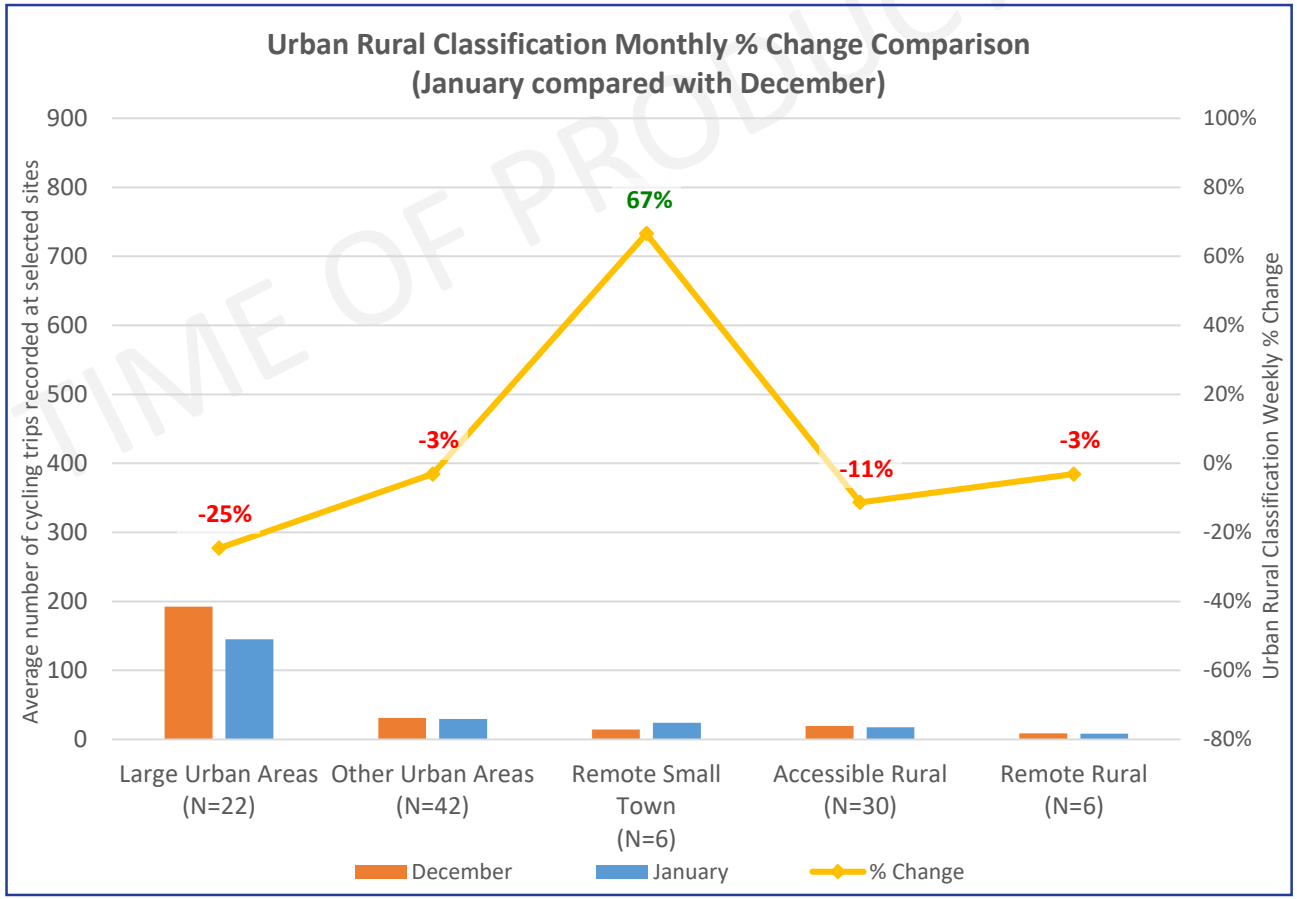
- Cycling activity over the January period (4 to 31 Jan) compared to December declined across most geographic categories from the sample sites available.
- Large Urban Areas reported the largest decrease in activity, with a decline of -25%. Similarly, Other Urban Areas showed a decline, although much less pronounced, with a -3% decrease.
- Accessible Rural and Remote Rural areas, also recorded a decline in cycling activity throughout the month, with decreases of -11% and -3% respectively.
- The exception to the general declines observed was Remote Small Towns, where a significant increase of 67% was recorded. However, the number of sample sites is low.

DATA NOTE: Accessible Small Towns excluded as no count sites present. Average number of trips are calculated as per counter values for each category.

Cycling: Urban Rural Cycling Activity

Source: Local Authorities and Cycling Scotland
Confidence: Medium

Monthly Change Comparison



COVID19 Trends in Sub-National Travel

January Report

PUBLIC TRANSPORT Monthly Change (1)

Bus and Train Monthly Change(1)	% Change
Bus Concessionary Travel(2)	14% ↑
Rail Stations (Central and Waverley)	3% ↑

Other Modes Monthly Change(1)	% Change
Glasgow Subway	17% ↑
Edinburgh Tram	-22% ↓
CalMac and NorthLink Passenger & Cars(3)	17% ↑
CalMac and NorthLink Commercial Vehicles(3)	37% ↑

(1) The Monthly Change Comparison compares first full week in January (week ending 10 Jan) with last week in January (week ending 31 Jan)

(2) Percentage change includes all local authorities of Scotland

(3) CalMac and NorthLink Ferries data is provided from Friday to Friday therefore Monthly Change compares week of the 2 Jan to 8 Jan with the 23 Jan to 29 Jan

Summary

- **Bus Concessionary Travel** – Bus concessionary travel recorded growth in January, increasing from 25% of 2020 levels during week ending 10 January to 28% of 2020 levels in week ending 31 January.
- **Rail Stations (Glasgow Central and Edinburgh Waverley)** – Glasgow Central (8%) reported an increase in monthly footfall while Edinburgh Waverley (-2%) recorded a decrease. Footfall was below baseline levels recorded in March 2020 at both locations, with 18% of typical activity recorded at Edinburgh Waverley, and 12% at Glasgow Central on average for the last week in January (WE 31).
- **Glasgow Subway and Edinburgh Trams** – Subway patronage increased while Tram decreased through January, with month on month changes of 17% and -22% respectively. Both remained well below baseline levels recorded in the equivalent 2019/2020 period at 6% (Trams) and 12% (Subway).
- **CalMac and Northlink Ferries** – The monthly change in Passenger traffic ranged from -5% to 21% on CalMac routes, while Northlink volumes were down -7%. Monthly changes in Car volumes also varied, with no change in Outer Hebrides, increases for Firth of Clyde (26%) and Argyll and Lochaber (34%), and a decline for Northlink routes (-18%). Commercial Vehicles volumes increased in all regions, with Calmac volumes up 17% to 55%, and Northlink routes up 67%. Passenger and Car volumes remained below baseline levels in all areas. While Commercial Vehicle volumes were also below baseline in Outer Hebrides and Argyll and Lochaber, they were above baseline in Firth of Clyde (13%) and on Northlink routes (12%).

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COVID19 Trends in Sub-National Travel

January Report

PUBLIC TRANSPORT – Bus Concessionary Travel

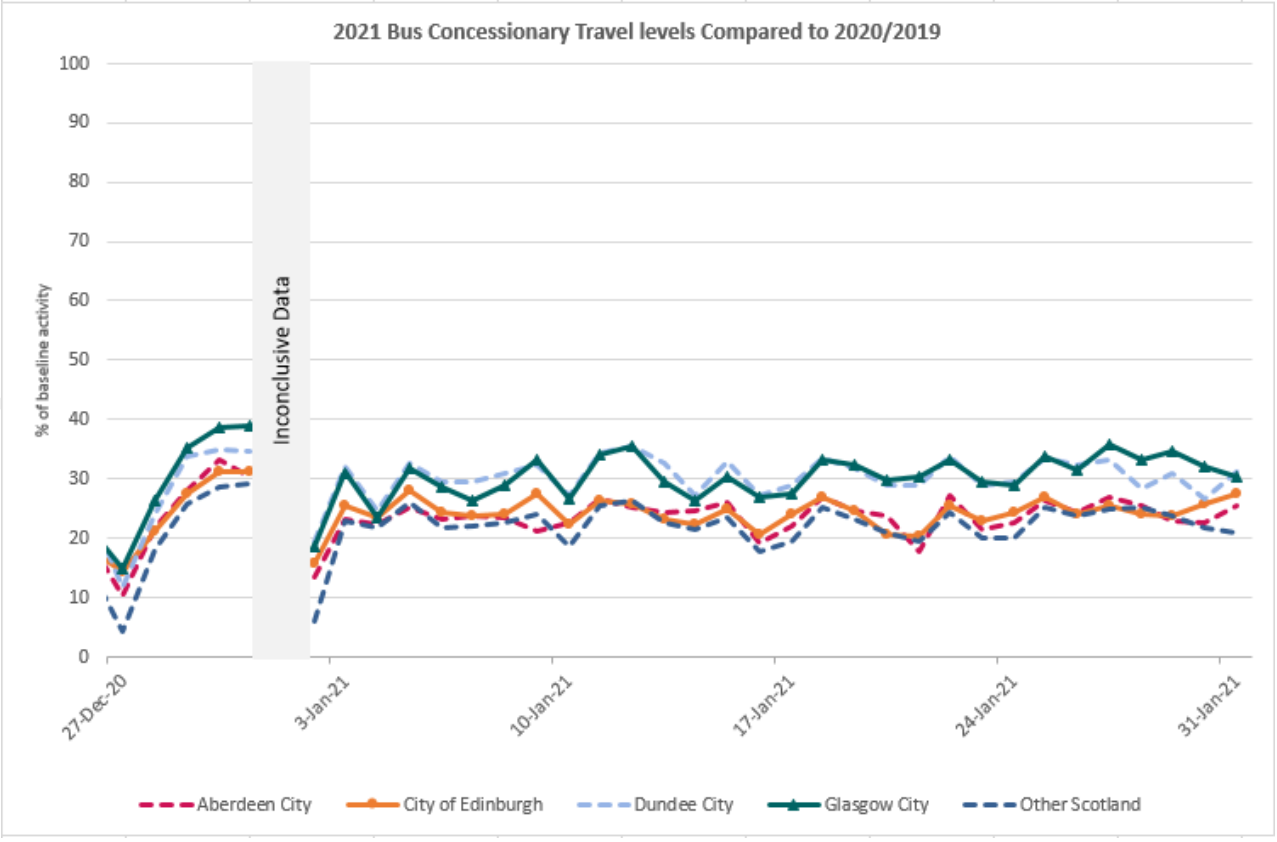
Key Points

- Throughout the month of January Bus Concessionary Travel activity remained significantly below levels recorded over the equivalent period in 2020. Travel increased from 25% of 2020 levels during week ending 10 January to 28% of 2020 levels in week ending 31 January.
- Midweek levels were broadly consistent throughout the month of January in each region.
- Activity in the 4 major cities remained low during week ending 31 January, likely related to still being under the highest COVID-19 Protection Level restrictions.
- Bus Concessionary travel levels in Dundee and Glasgow were closer to 2020 demand than Edinburgh and Aberdeen. During week ending 31 January 2021, levels in Dundee and Glasgow were 31% and 33% of baseline respectively. Edinburgh travel was 29% of the equivalent period in 2020, while Aberdeen was at 25%.

Bus Concessionary Travel

Source: ITSO Electronic Transactions Data (Excludes Manual Transactions)
Confidence: Medium

Baseline: Index 100 = Equivalent Period in 2020



***DATA NOTE**: Bus concessionary travel data captures the issuing Local Authorities rather than where the journeys have taken place. The data has been used here as an estimation of Local Authority concessionary travel.*

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COVID19 Trends in Sub-National Travel

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PUBLIC TRANSPORT – Train Station

Key Points

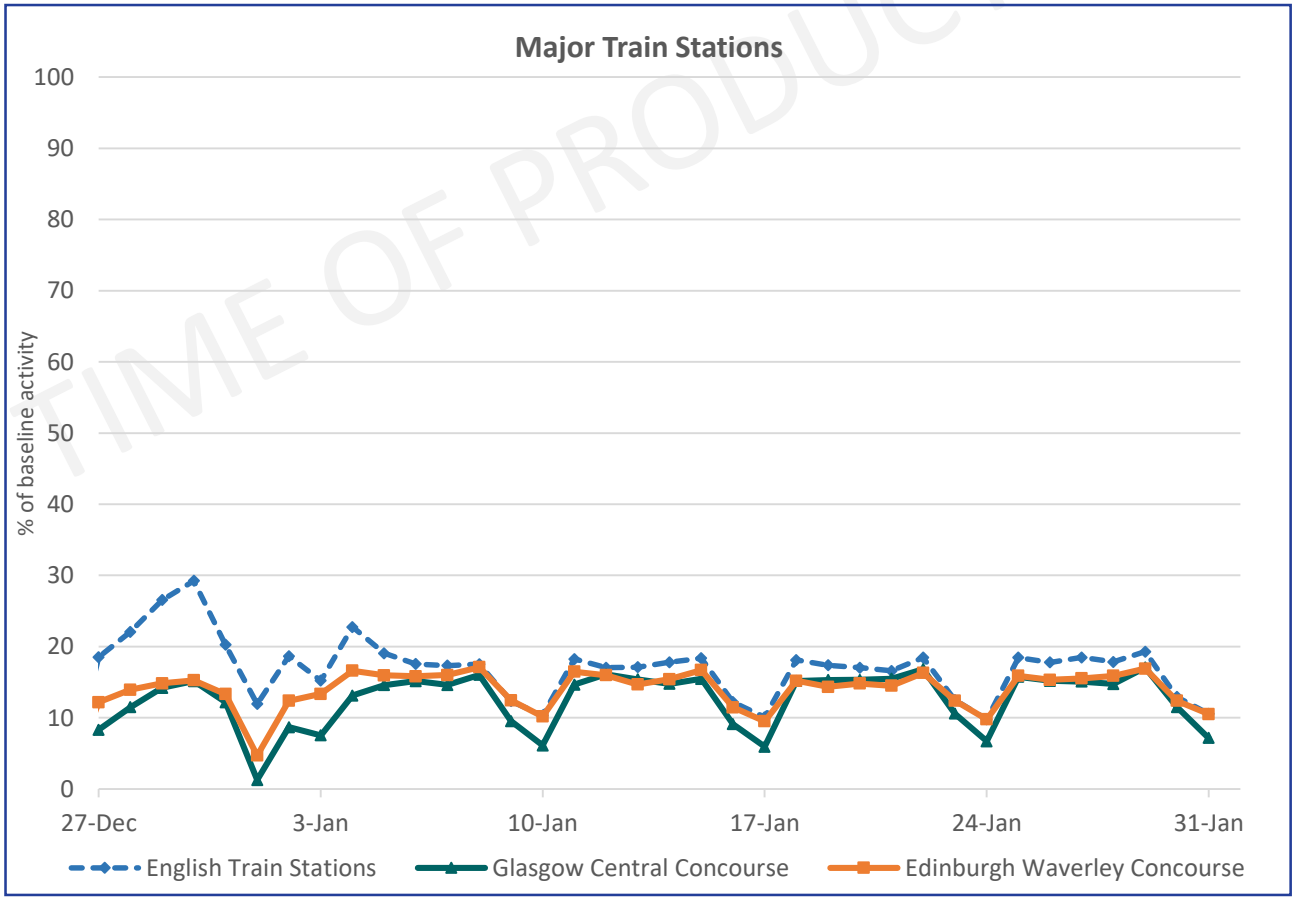
- Observed footfall in Edinburgh Waverley decreased by -2% whilst Glasgow Central increased by 8% comparing week ending 31 January to the first week of January (week commencing 4). Similar to Waverley Station, sample English stations saw a decline over this period, with footfall decreasing by -3% on average.
- Footfall was below baseline levels recorded in March 2020 at both locations, with 18% of typical activity recorded at Edinburgh Waverley, and 12% at Glasgow Central on average for the last week in January (week ending 31 January).
- Notwithstanding the low volumes observed around New Year's Day, footfall remained at a low level through the month, likely due to Protection Level 4 restrictions remaining in place from 26 December.
- Rail passenger volumes remain significantly below baseline levels for all stations, reflecting the continuation of high COVID-19 Protection Levels.

DATA NOTE: Data shown represents the level of footfall at station concourses. English Train Stations include: Birmingham New Street, Bristol, Leeds Central, Liverpool Lime Street, Manchester Piccadilly and Reading.

Major Train Stations

Source: Network Rail
Confidence: High

Baseline: Index 100 = 2 March to 15 March 2020



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COVID19 Trends in Sub-National Travel

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PUBLIC TRANSPORT – Glasgow Subway and Edinburgh Tram

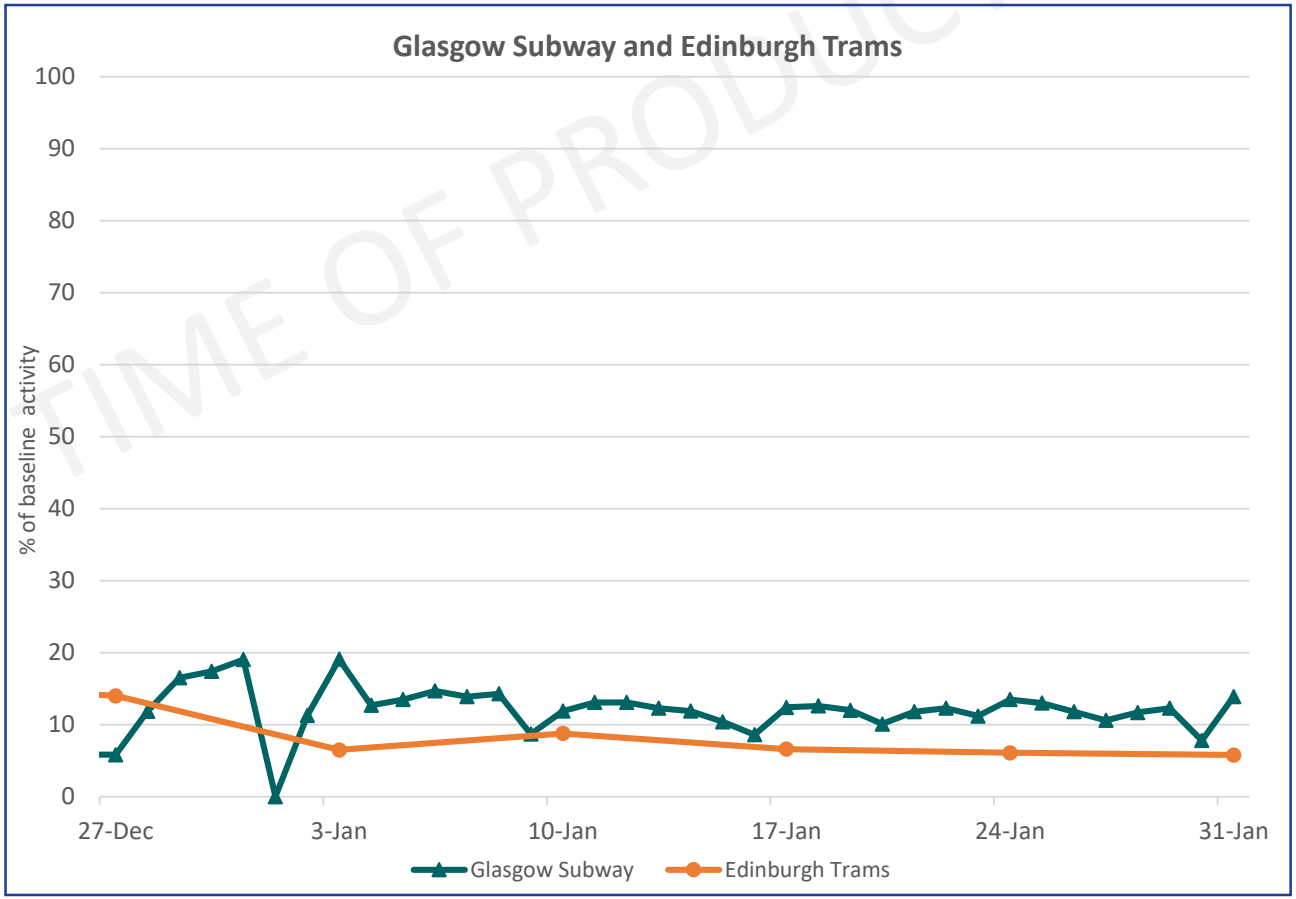
Key Points

- Through the month of January, Glasgow Subway volumes increases by 17% comparing the last week of the month (week ending 31 January) with the first week (week commencing 4 January), while Edinburgh Trams volumes saw a decrease of -22%.
- Compared to baseline levels, Edinburgh Trams volumes gradually decreased on average in each week through January, reducing to 6% of baseline levels in the last week of the month.
- Patronage on the Glasgow Subway remained steady through the month compared with the previous year, excluding the period around New Year, with volumes around 12% of baseline levels.

Glasgow Subway and Edinburgh Tram

Source: SPT and Edinburgh Trams
Confidence: High

Baseline: Index 100 = Equivalent Period in 2019 & 2020



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COVID19 Trends in Sub-National Travel

January Report

PUBLIC TRANSPORT – Ferries CalMac (Monthly Change)

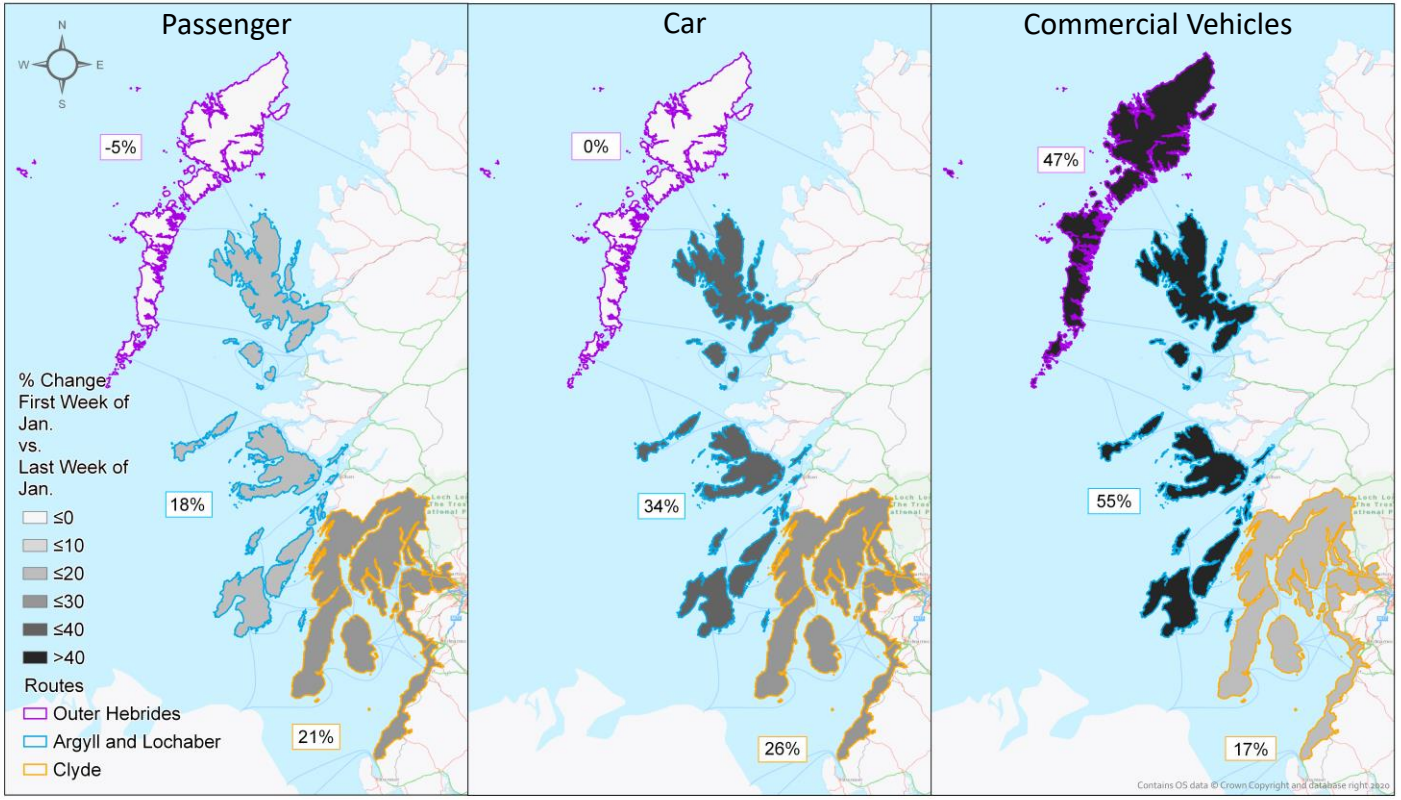
Key Points

- In the period from week ending 8 January (2 Jan to 8 Jan) to week ending 29 January (23 Jan to 29 Jan), CalMac passenger volumes decreased by 5% in 'Outer Hebrides', while 'Argyll and Lochaber' and 'Firth of Clyde' increased by 18% and 21% respectively.
- Car volumes increased in 'Firth of Clyde' (26%) and 'Argyll and Lochaber' (34%) compared to start of January levels, while 'Outer Hebrides' volumes remained consistent over the same period.
- Commercial vehicle volumes increased in all regions, with increases of 55% in 'Argyll and Lochaber', 17% in 'Firth of Clyde' and 47% in 'Outer Hebrides'.

CalMac Ferries Data

Source: CalMac
Confidence: High

Monthly Change Comparison



DATA NOTE: 'Outer Hebrides' includes: Outer Hebrides. 'Argyll and Lochaber' includes: Skye, Raasay, Small Isles, Southern Hebrides and Inner Hebrides. 'Clyde' includes: Firth of Clyde. All data within this report is unaudited and provisional. The figures are for guidance only and should not be regarded as exact or quoted *period*.

COVID19 Trends in Sub-National Travel

January Report

PUBLIC TRANSPORT – Ferries CalMac (Change from Baseline)

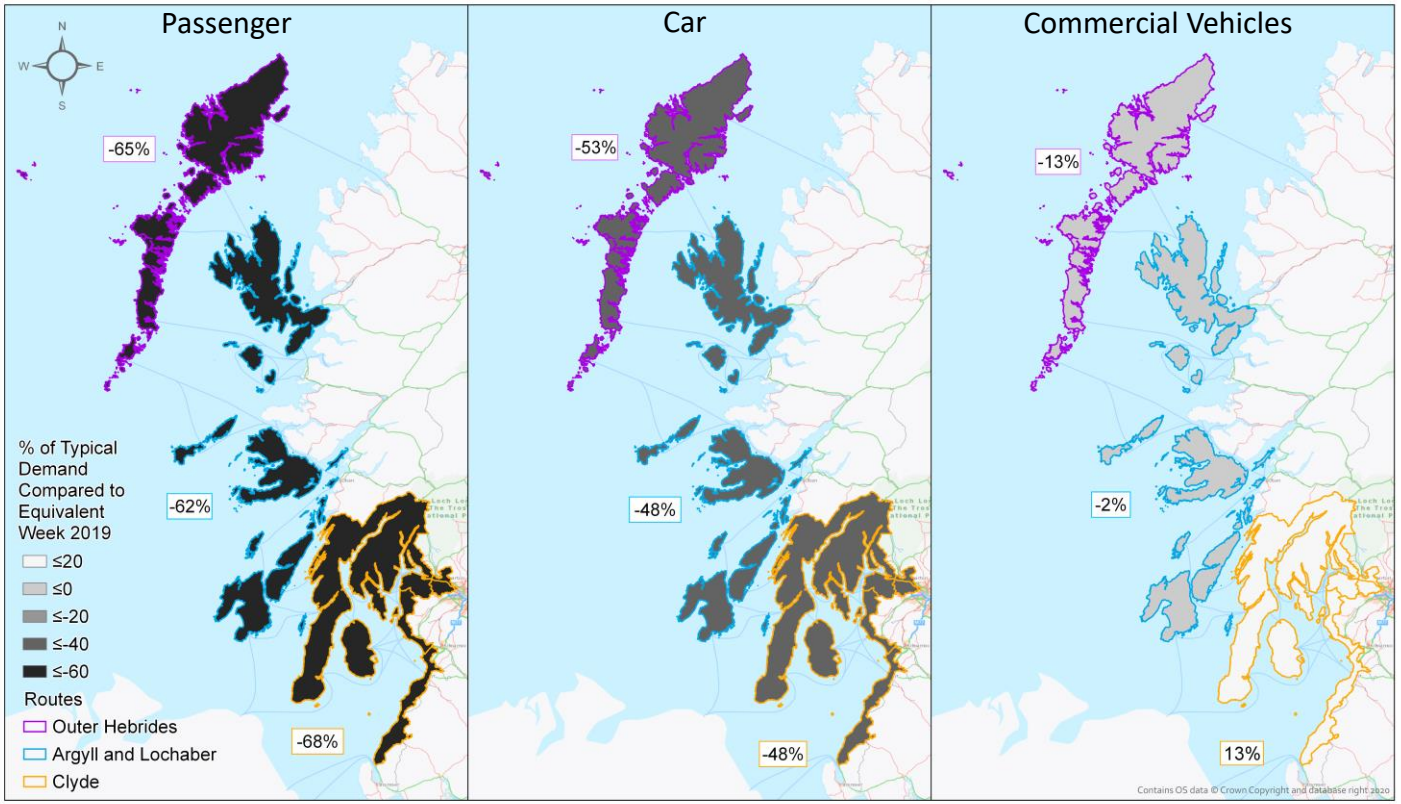
Key Points

- In week ending 29 January, CalMac passenger and car volumes remained considerably below levels recorded in the equivalent week in 2020.
- Passenger volumes were down -68% compared to baseline in 'Firth of Clyde', -65% in 'Outer Hebrides', and -62% in 'Argyll and Lochaber'.
- For car volumes, 'Firth of Clyde' and 'Argyll and Lochaber' levels were down -48% compared to baseline, while the change in car volumes in 'Outer Hebrides' was slightly greater, at -53%.
- Commercial vehicle volumes were lower than 2020 baseline levels by -13% in 'Outer Hebrides' and -2% in 'Argyll and Lochaber' but, there was an increase of 13% in 'Firth of Clyde'.

CalMac Ferries Data

Source: CalMac
Confidence: High

Baseline: Index 100 = Equivalent Period in 2019 & 2020



DATA NOTE: 'Outer Hebrides' includes: Outer Hebrides. 'Argyll and Lochaber' includes: Skye, Raasay, Small Isles, Southern Hebrides and Inner Hebrides. 'Clyde' includes: Firth of Clyde. All data within this report is unaudited and provisional. The figures are for guidance only and should not be regarded as exact or quoted *period*.

COVID19 Trends in Sub-National Travel

January Report

PUBLIC TRANSPORT – Ferries Northlink (Monthly Change)

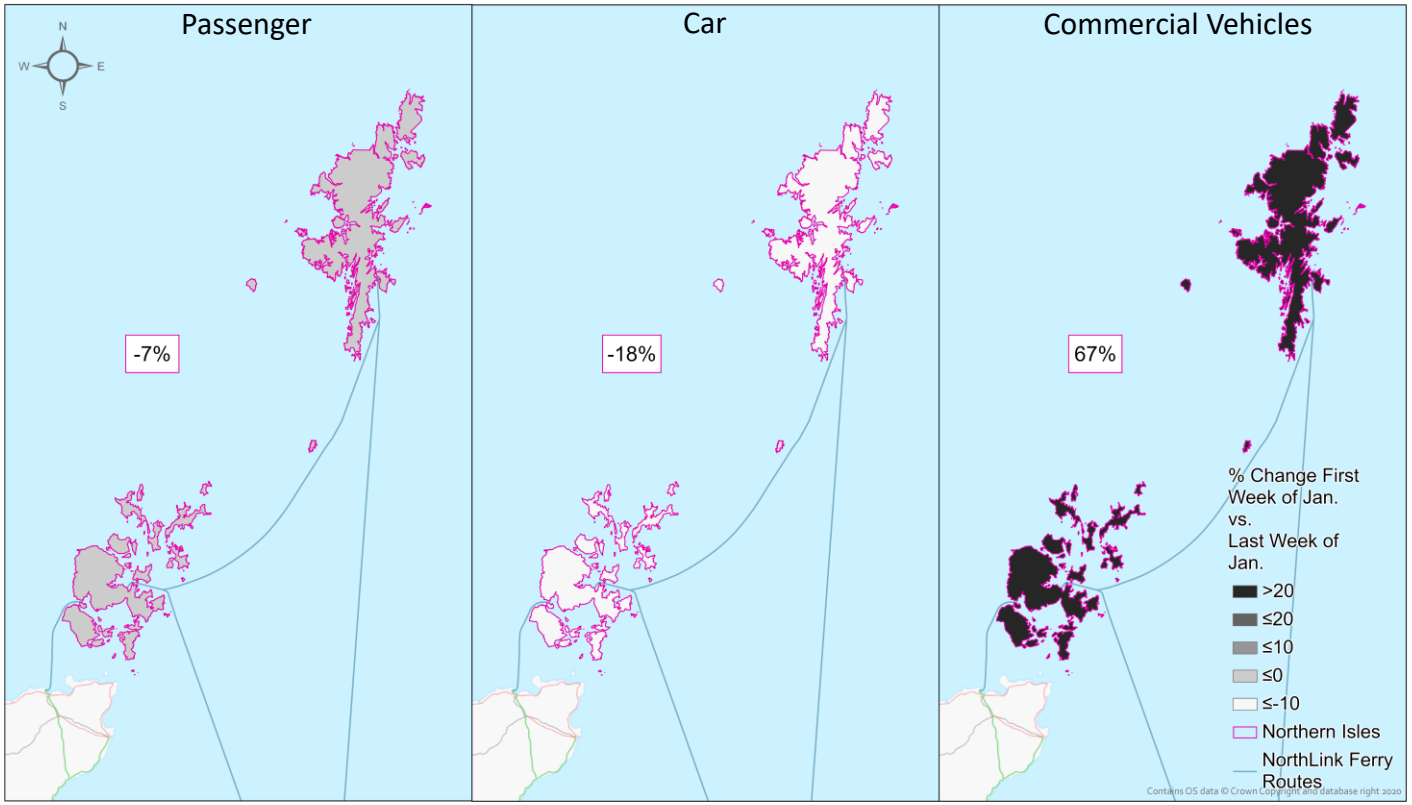
Key Points

- In the period from week ending 8 January (1 Jan to 8 Jan) to week ending 29 January (23 Jan to 29 Jan), NorthLink passenger volumes decreased by 7%.
- Similarly, Car volumes also decreased by 18% compared to start of January levels.
- Commercial vehicle volumes increased however, with a growth of 67% in the Northern Isles.

NorthLink Ferries Data

Source: NorthLink
Confidence: High

Monthly Change Comparison



DATA NOTE: 'Northern Isles' includes Shetland Islands and Orkney Islands. All data within this report is unaudited and provisional. The figures are for guidance only and should not be regarded as exact or quoted *period*.

COVID19 Trends in Sub-National Travel

January Report

PUBLIC TRANSPORT – Ferries Northlink (Change from Baseline)

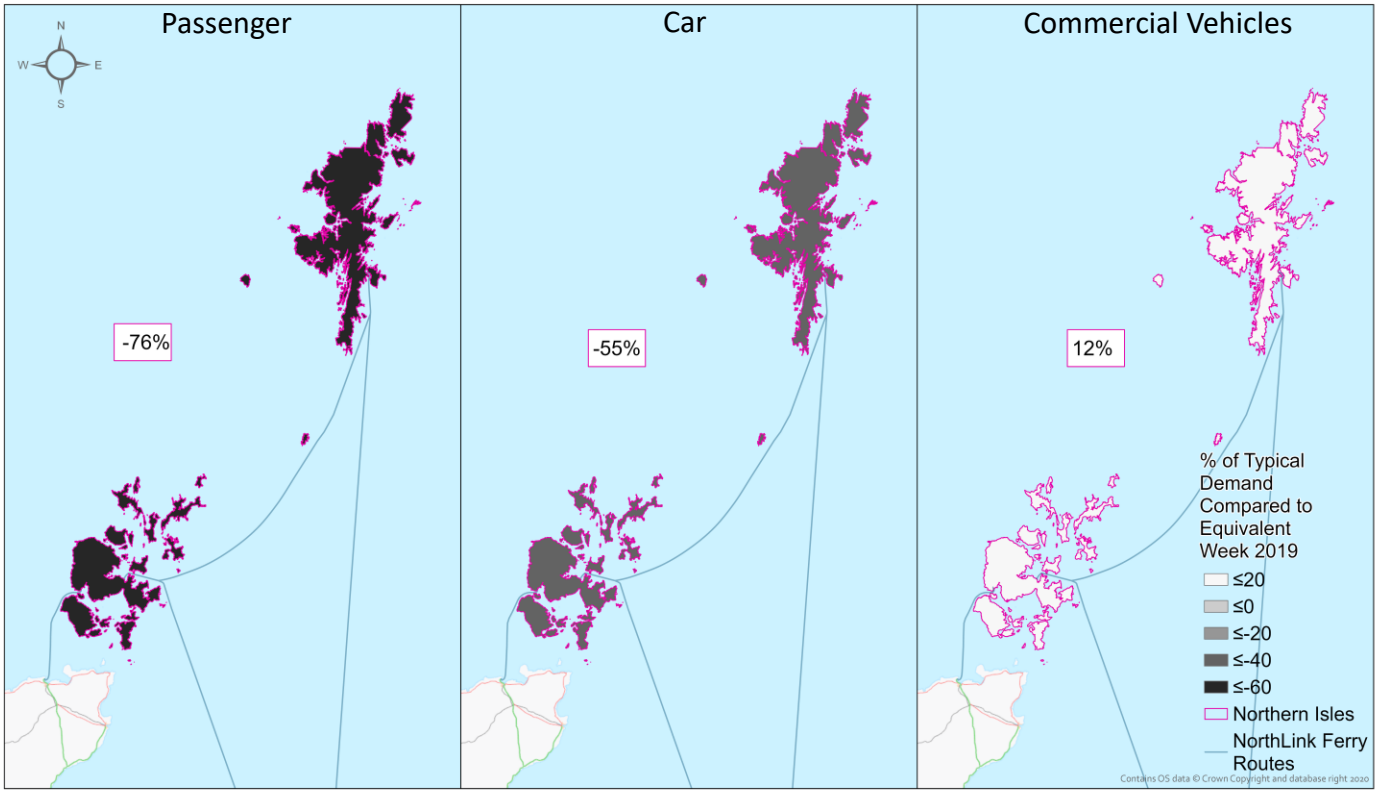
Key Points

- In week ending 29 January, passengers and car volumes on NorthLink ferries in the Northern Isles remained considerably below levels recorded in the equivalent week in 2020. Passenger volumes were down -76% compared to baseline, with car volumes down -55% for the same period.
- Whilst Commercial vehicle volumes were above 2020 baseline levels by 12% in Northern Isles.

NorthLink Ferries Data

Source: NorthLink
Confidence: High

Baseline: Index 100 = Equivalent Period in 2019 & 2020



DATA NOTE: 'Northern Isles' includes Shetland Islands and Orkney Islands. All data within this report is unaudited and provisional. The figures are for guidance only and should not be regarded as exact or quoted *period*.

COVID19 Trends in Sub-National Travel

January Report

ROAD TRAFFIC Monthly Change (1)

City Local Authorities(2)	% Change
Road Traffic (Car + Mcl)(4)	-23% ↓
Road Traffic (LGV + HGV)(4)	-32% ↓

Rest of Scotland LA Average(3)	% Change
Road Traffic (Car + Mcl)(4)	-27% ↓
Road Traffic (LGV + HGV)(4)	-27% ↓

Monthly Change(1)	% Change
Cross-Border Trunk Road	-24% ↓

(1) The Monthly Change Compares the average daily value for the whole of December (30 November to 27 December) with an average daily value for the whole of January (4 to 31 January)

(2) City Local Authorities include Glasgow, Edinburgh, Aberdeen and Dundee except for Active Travel which only includes Glasgow and Edinburgh

(3) Rest of Scotland Local Authorities (LAs) include all authorities excluding the four mentioned city local authorities above except for Active Travel which includes Argyll & Bute, East Dunbartonshire, North Ayrshire, Perth & Kinross and Stirling

(4) Small traffic counter sample size for Glasgow

Summary

- **Cross Border Traffic (Trunk Roads)** – On average over the month of January cross-border traffic decreased by 24% compared to December levels, lower than the national average decrease of 25%. Average traffic levels remained below those recorded in the equivalent 2019 and 2020 period.
- **Trunk Road Traffic** – January traffic volumes declined month on month across most of the country. Individual sites saw some growth, mainly in the vicinity of Edinburgh and Aberdeen. Compared to the March 2020 pre-COVID-19 baseline period, observed traffic generally remained below baseline levels. Traffic volumes around large urban centres were below baseline levels and declines on the A9, A90, A92 and A82 were particularly notable.

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COVID19 Trends in Sub-National Travel

January Report

ROAD TRAFFIC – Cross-Border Trunk Road Traffic

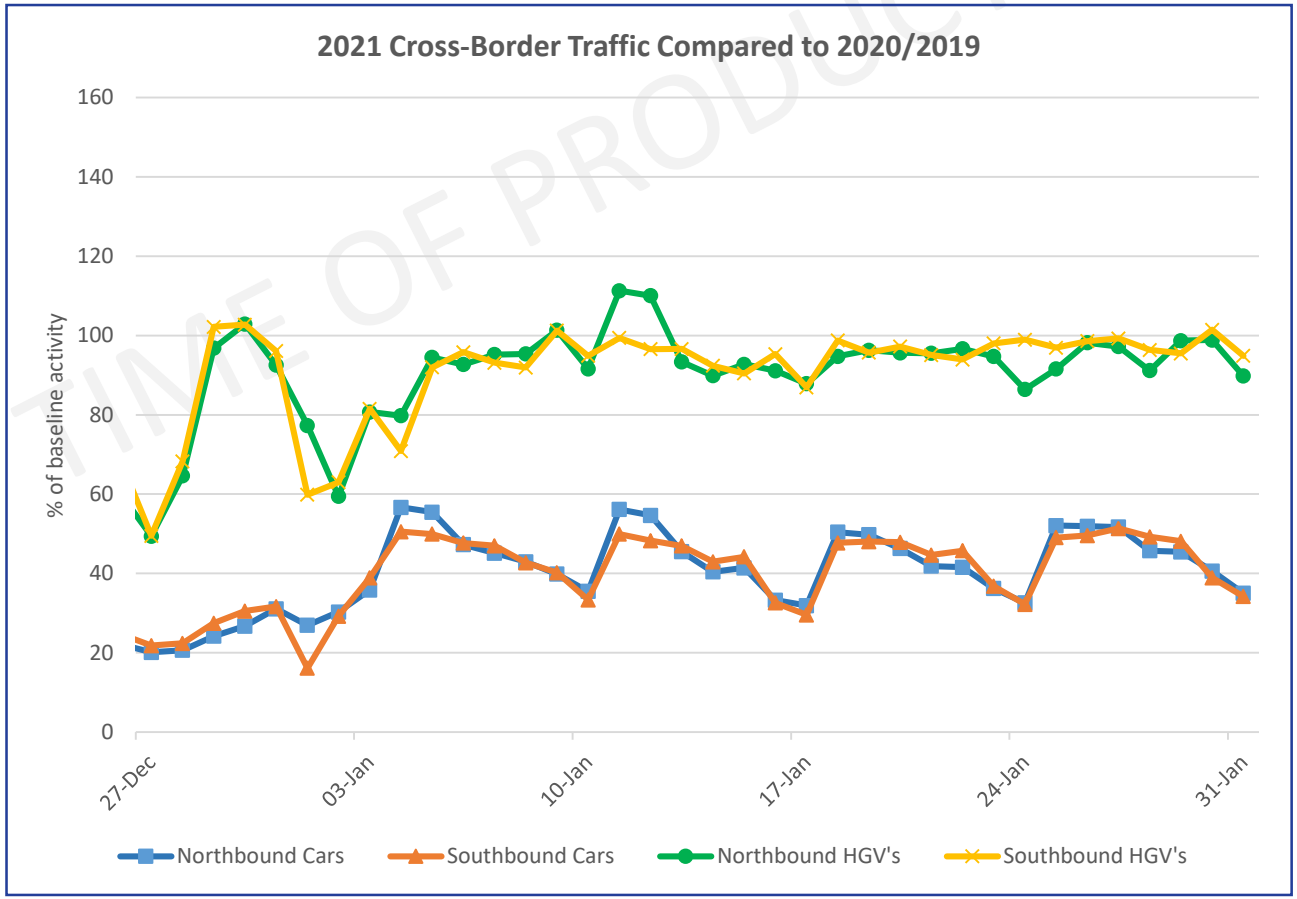
Key Points

- The month of January saw an overall decrease in cross-border traffic. An average decline of 24% in traffic was recorded compared to December.
- January saw traffic volumes 41% lower than baseline levels on average, representing a decrease compared to December, when cross-border traffic was 30% lower than the previous year.
- After the dip in traffic levels on 1 and 2 January, car cross-border traffic returned to a pattern where Mondays see the highest level of activity and Sundays usually record the lowest levels.
- HGV levels remained broadly consistent through the month of January nearing baseline levels in both directions.

Cross-Border Trunk Road Traffic

Source: Road Counters
Confidence: Medium

Baseline: Index 100 = Equivalent Period in 2019 & 2020



NOTE: *Data obtained from four count sites located on key routes along the Scottish border to provide an estimate of cross-border activity. Sites include: A1 Burnmouth; A68 Carter Bar; A7 South of Cannonbie; and M6 South of Gretna (northbound and southbound).*

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COVID19 Trends in Sub-National Travel

January Report

ROAD TRAFFIC – Country-Wide Traffic (Compared to Prior Month)

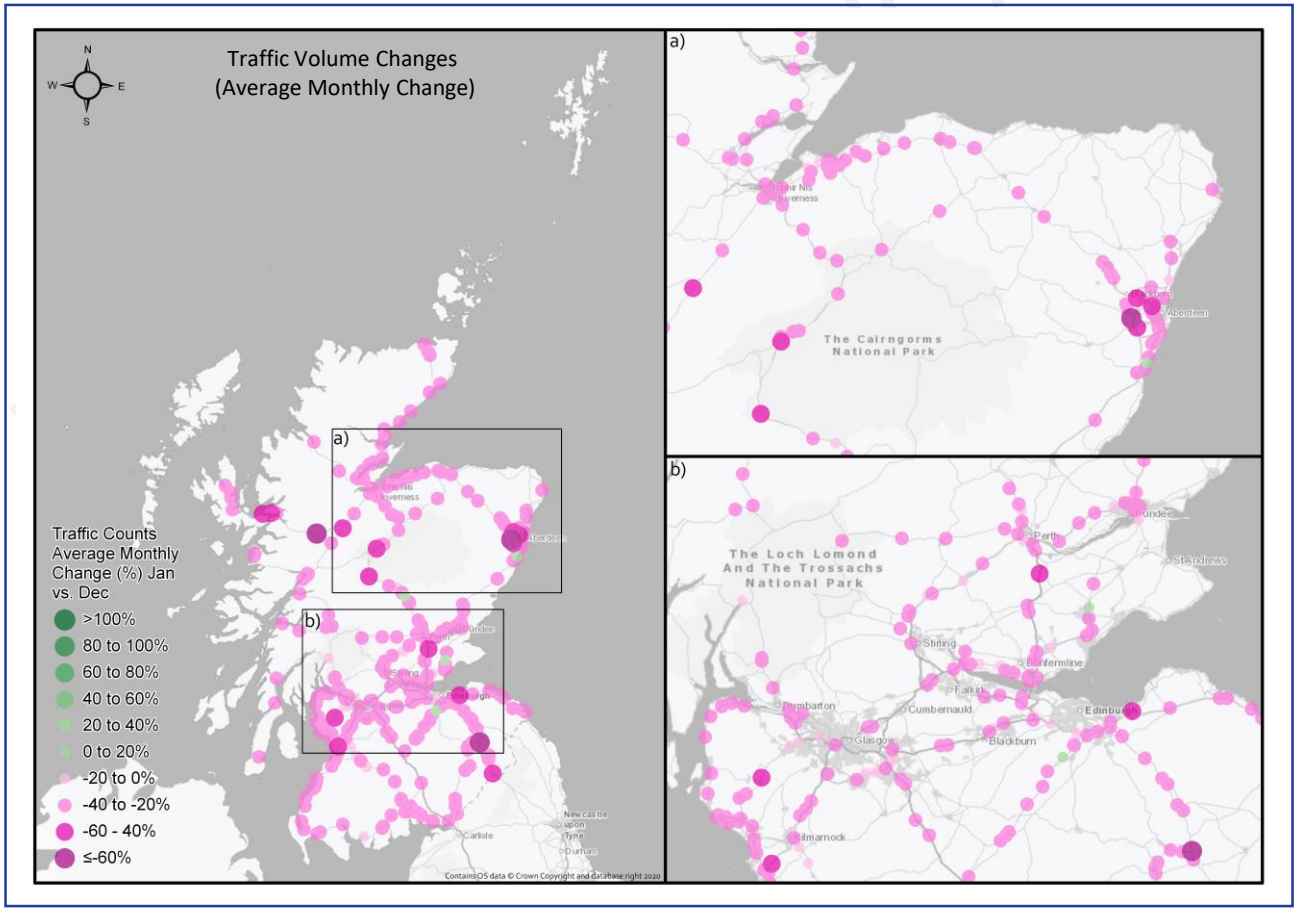
Key Points

- In the month of January compared to December, the majority of count sites experienced declines. However, a limited number of sites saw slight growth.
- Monthly declines were particularly evident on sections of the A9, the A90 and A96, particularly in the vicinity of Aberdeen, the M74, and in rural areas. Observed reductions tended to range between -1% and -60%, with several other sites seeing greater declines.
- Where growth was observed, it tended to be at individual sites and not in growth clusters. Some increases were observed around Edinburgh and Aberdeen.
- Comparing January volumes to the baseline period (first two weeks of March 2020), the majority of sites recorded a decrease in traffic, with a decline in traffic volumes on all major trunk road corridors around Scotland.
- Volumes in cities generally remain below baseline levels. Declines on the A9, A90, A92 and A82 were particularly notable.

Country-Wide Road Traffic

Source: Road Counters
Confidence: Medium

Monthly Change Comparison



DATA NOTE: Data is informed by trunk road traffic counters only and does not include the local road network.

COVID19 Trends in Sub-National Travel

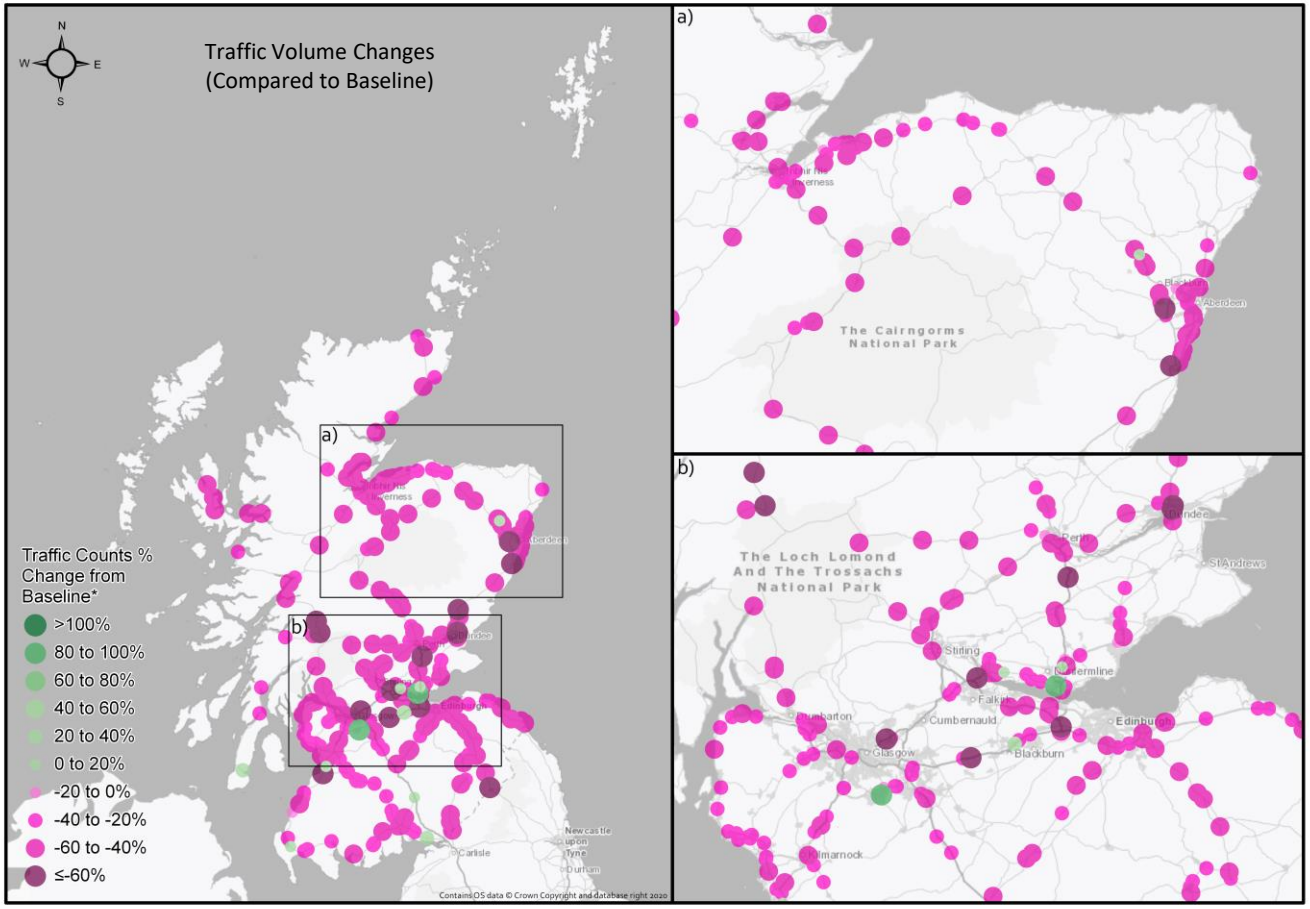
January Report

ROAD TRAFFIC – Country-Wide Traffic (Compared to Baseline)

Country-Wide Road Traffic

Source: Road Counters
Confidence: Medium

Baseline: 2 March to 15 March 2020



COVID19 Trends in Sub-National Travel

January Report

ROAD TRAFFIC – Urban Rural Trunk Road Traffic

Key Points

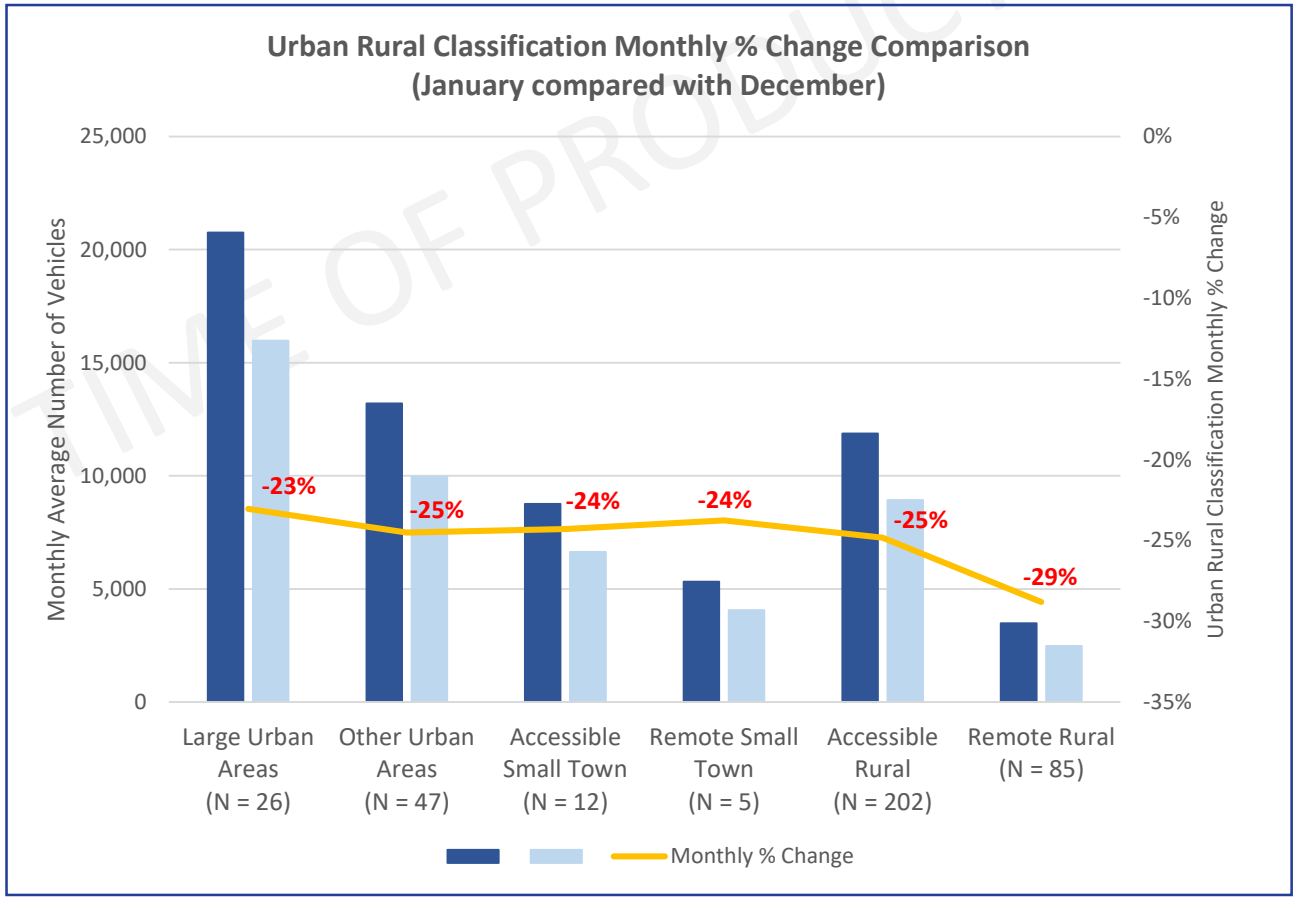
- On average over January, all categories across the Urban Rural 6 Fold Classification (representing selected sites) saw a decline in the number of vehicles recorded compared to December.
- The lowest reduction in traffic was recorded in the 'Remote Rural' category, with a decrease of 29%.
- 'Other Urban Areas' and 'Accessible Rural' categories saw a decrease in line with the national average of 25%.
- 'Large Urban Areas', 'Accessible Small Town' and 'Remote Small Towns' categories observed decreases of 23%, 24% and 24% respectively compared to December.

DATA NOTE: Average number of trips are calculated as per counter values for each category.

Urban Rural Trunk Road Traffic

Source: Road Counters
Confidence: Medium

Monthly Change Comparison



Prepared on behalf of Transport Scotland's COVID-19 Support Hub, any enquires should be made to TS.Covid19Support@gov.scot. If this data is used in any ministerial (or other) briefings, please contact the same email address to check it is still accurate.

COVID19 Trends in Sub-National Travel

January Report

ROAD TRAFFIC – INRIX Trunk Road Speeds (Cities)

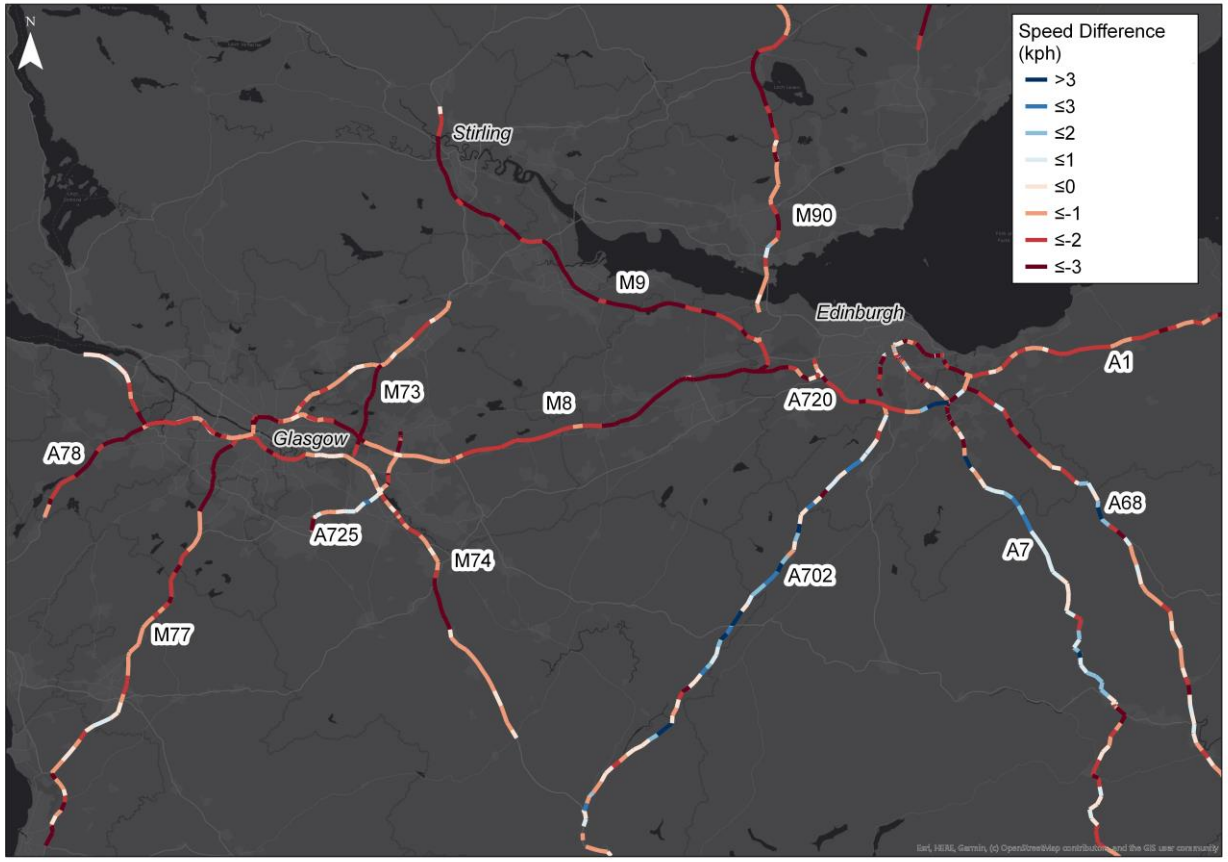
Key Points

- The Trunk Road Traffic Speeds map shows the difference in observed traffic speeds through January compared to December on key trunk road corridors around the Central Belt (Glasgow – Edinburgh). INRIX provides data on a link by link basis for corridors, allowing data to be visualised for each road section. The map compares the average speed observed on a weekday in December and January between 09:00 and 10:00 (most congested hour in morning period) and inbound movements for each city.
- For Edinburgh, compared with December there was a visible decrease in speeds on approach to the city on trunk corridors, particularly the M90, M9, A1, A720 and sections of the A68. The A702 and A7 saw comparable speeds to the previous month generally, suggesting consistent traffic volumes and profile patterns.
- Similar to Edinburgh, Glasgow recorded a reduction in speeds on all trunk road corridors on approach to the city.
- Slower vehicle speeds experienced on most trunk corridors in the Central Belt through January may have been influenced by poorer weather rather than congestion. This is supported by the Drakewell data, which indicates no monthly growth in traffic levels, resulting in slower speeds.

Trunk Road Traffic Speeds – Central Belt

Source: INRIX
Confidence: Medium

Monthly Change Comparison



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COVID19 Trends in Sub-National Travel

January Report

ROAD TRAFFIC – INRIX Trunk Road Speeds (Cities)

Key Points

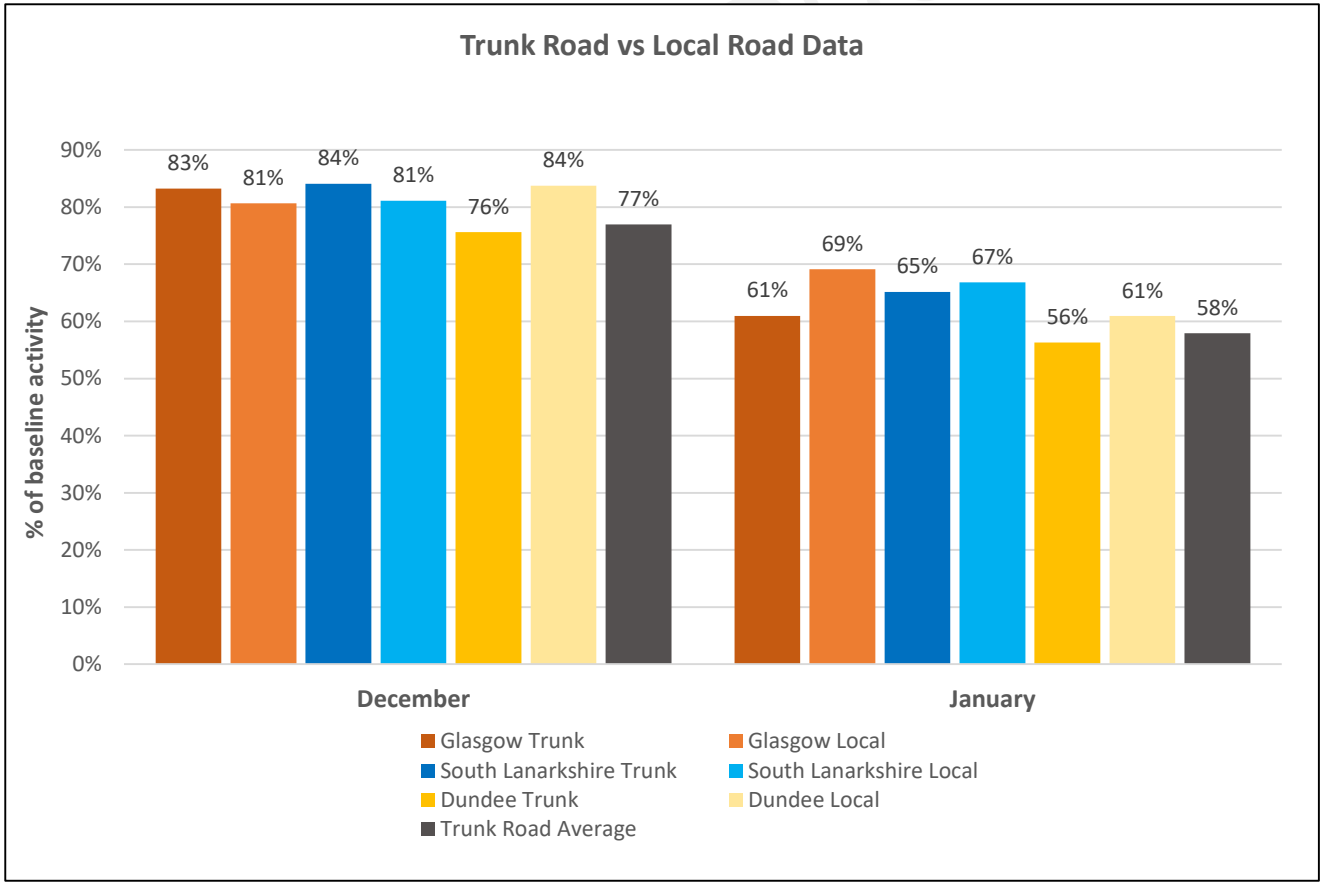
- Local road traffic observed over January showed decreases across the board compared to December
- Most local roads saw similar decreases against their baselines to those of nearby trunk roads, with the exception of Glasgow City Council that saw a greater decline in Trunk Road traffic compared to the local road use.
- Local road traffic has mirrored the trunk road network throughout most of the COVID-19 pandemic with only a few notable exceptions
- In the first stage of lockdown, Glasgow City Council saw a smaller decline in levels than the trunk road and other council areas, but converged with the other local authorities by Phase 3.
- From Phase 3 until the Strategic Framework levels were introduced the trunk road levels were closer to pre-COVID levels than those seen on the local roads.

Local and Trunk Road Traffic Data (Dec 2020 and Jan 2021)

Baseline Change Comparison

Source: Glasgow Council Local Authority, Dundee Council Local Authority, South Lanarkshire Council Local Authority, Stirling Council Local Authority, Road Counters

Baseline: Index 100 = Fortnight beginning March 2, 2020



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COVID19 Trends in Sub-National Travel

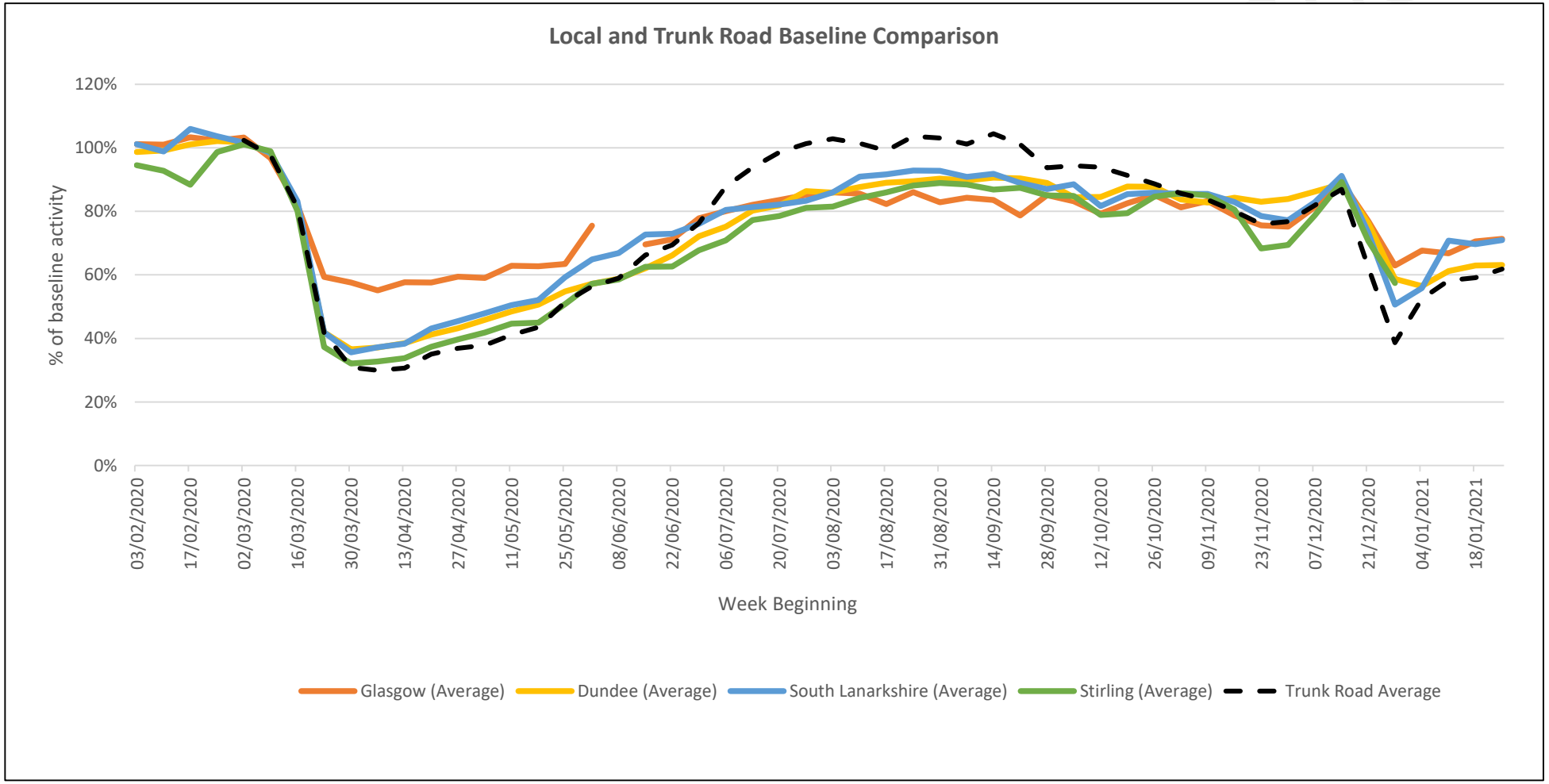
January Report

Local and Trunk Road Traffic Data (Feb 2020 to Jan 2021)

Baseline Change Comparison

Source: Glasgow Council Local Authority, Dundee Council Local Authority, South Lanarkshire Council Local Authority, Stirling Council Local Authority, Road Counters

Baseline: Index 100 = Fortnight beginning March 2, 2020



COVID19 Trends in Sub-National Travel

January Report

GOOGLE TRENDS Monthly Change (1)

City Local Authorities(2)	% Change
Grocery & Pharmacy(4)	-16% ↓
Retail & Recreation(4)	-26% ↓
Parks(4)	3% ↑
Workplace(4)	-13% ↓
Overall Mobility(4)	-13% ↓

Rest of Scotland LA Average(3)	% Change
Grocery & Pharmacy(4)	-18% ↓
Retail & Recreation(4)	-34% ↓
Parks(4)	4% ↑
Workplace(4)	-15% ↓
Overall Mobility(4)	-15% ↓

(1) Monthly Change compares the whole of January with the whole of December

(2) City Local Authorities (LAs) include Glasgow, Edinburgh, Aberdeen and Dundee

(3) Rest of Scotland Local Authorities includes all regions except the four City Local Authorities

(4) Latest full week of available data for Google movements trends: Week ending 29 January

Summary – Google Mobility Data

- Grocery and Pharmacy movements saw a decrease in January compared to the previous month, ranging between -20% (Aberdeen) and -15% (Edinburgh) in city regions, and between -25% (Renfrewshire) and -15% (East Renfrewshire and North Lanarkshire) in non-city regions.
- Workplace movements decreased in all regions, with monthly declines ranging from 9% (Orkney) and 21% (Highland and Argyll and Bute).
- Retail and Recreation also declined in all regions compared to the previous month. Glasgow saw the lowest decline (-22%) and Midlothian saw the highest (-46%).
- Average Mobility declined across all regions in January. Excluding the island regions due to limited data, the largest decrease was in Highland (-22%). Glasgow, Edinburgh and Aberdeen all saw declines of 13%, while the decrease in Dundee was slightly higher at 14%.

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COVID19 Trends in Sub-National Travel

January Report

GOOGLE TRENDS – 'Grocery and Pharmacy' and 'Retail and Recreation'

'Grocery and Pharmacy' Key Points

- Grocery and Pharmacy movements declined in all areas on average in January compared to the previous month. City regions experienced changes ranging from -20% (Aberdeen) to -15% (Edinburgh), while in non-city regions, monthly changes ranged from -25% (Renfrewshire) to -15% (East Lothian and East Renfrewshire).
- Compared to baseline, volumes in city regions ranged between -25% (Aberdeen) and -28% (Glasgow), while the largest reductions seen in non-city regions were in Perth and Kinross and Highland, which both recorded declines of 30%.

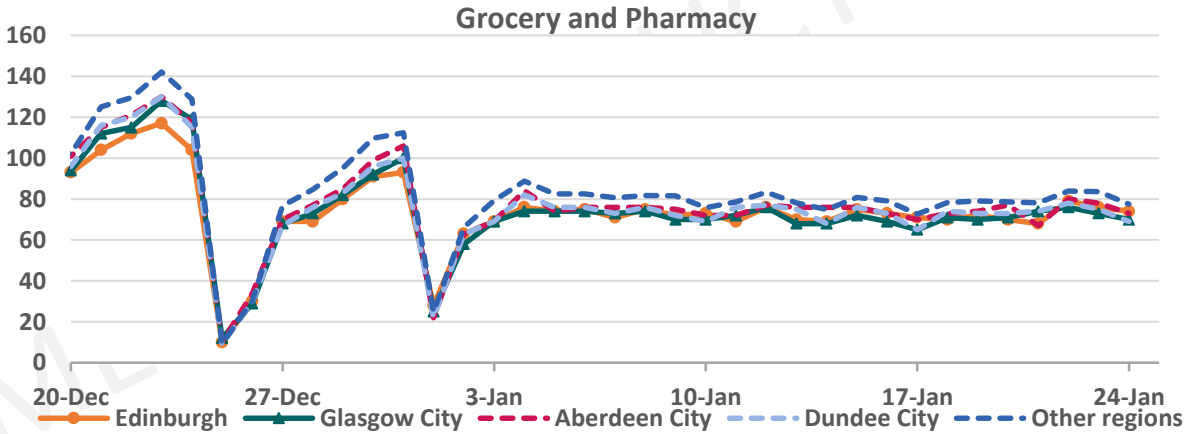
'Retail and Recreation' Key Points

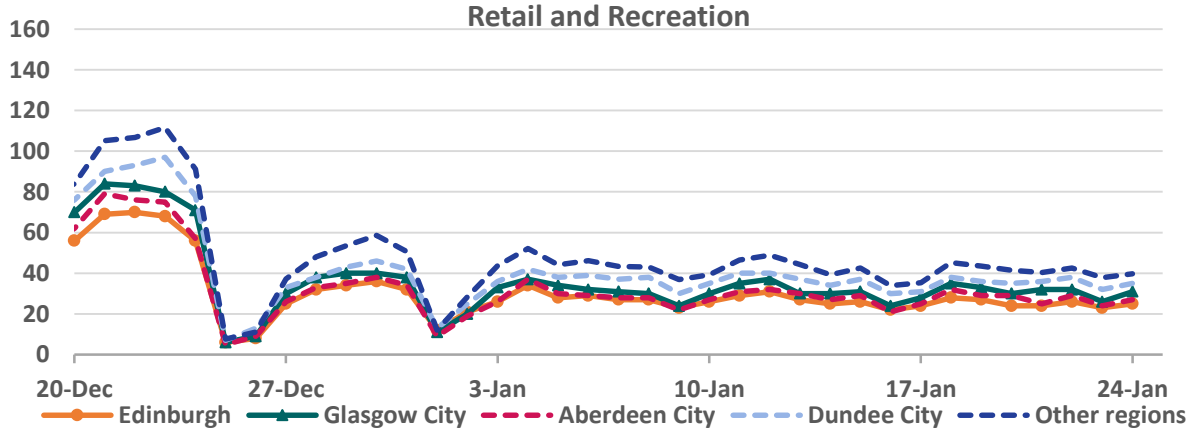
- Retail and Recreation activity also declined in all areas on average in January compared to December. Non-city regions saw more significant decreases than city regions, with the most pronounced being in Midlothian (-46%), Moray (-45%) and Highland (-44%). Changes in city regions ranged between -22% (Glasgow) and -34% (Dundee).
- Compared to baseline, activity in city regions was lower than most non-city regions, ranging from -64% (Dundee) to -74% (Edinburgh). All non-city regions also remained below baseline levels, with changes ranging from -46% (East Renfrewshire) to -70% (Perth and Kinross).

Google Movement Data for Scottish Cities

Source: Google Community Mobility Report 31 January 2021
Confidence: Low

Latest available data:
Week Ending 24 January 2021
Baseline: Index 100 = February 2020





***NOTE**: Values have been calculated using a weighted population factor for Local Authorities. Other regions refers to all Scotland LAs (where data is available) excluding Edinburgh, Glasgow, Aberdeen and Dundee.*

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COVID19 Trends in Sub-National Travel

January Report

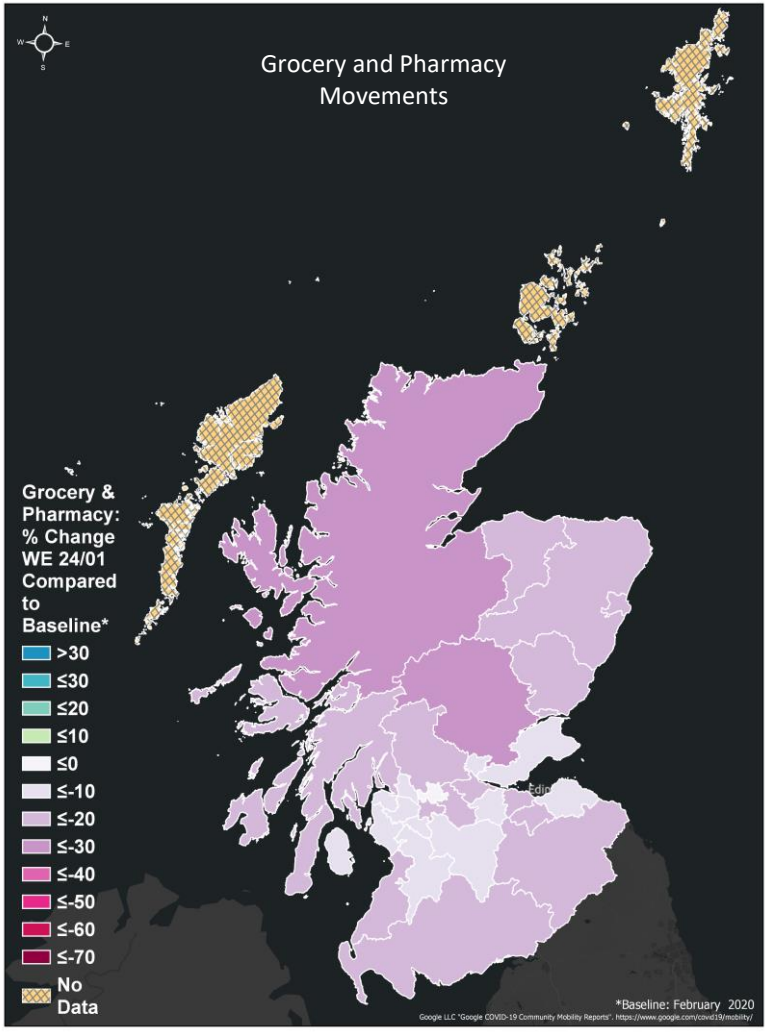
GOOGLE TRENDS – 'Grocery & Pharmacy' and 'Retail & Recreation'

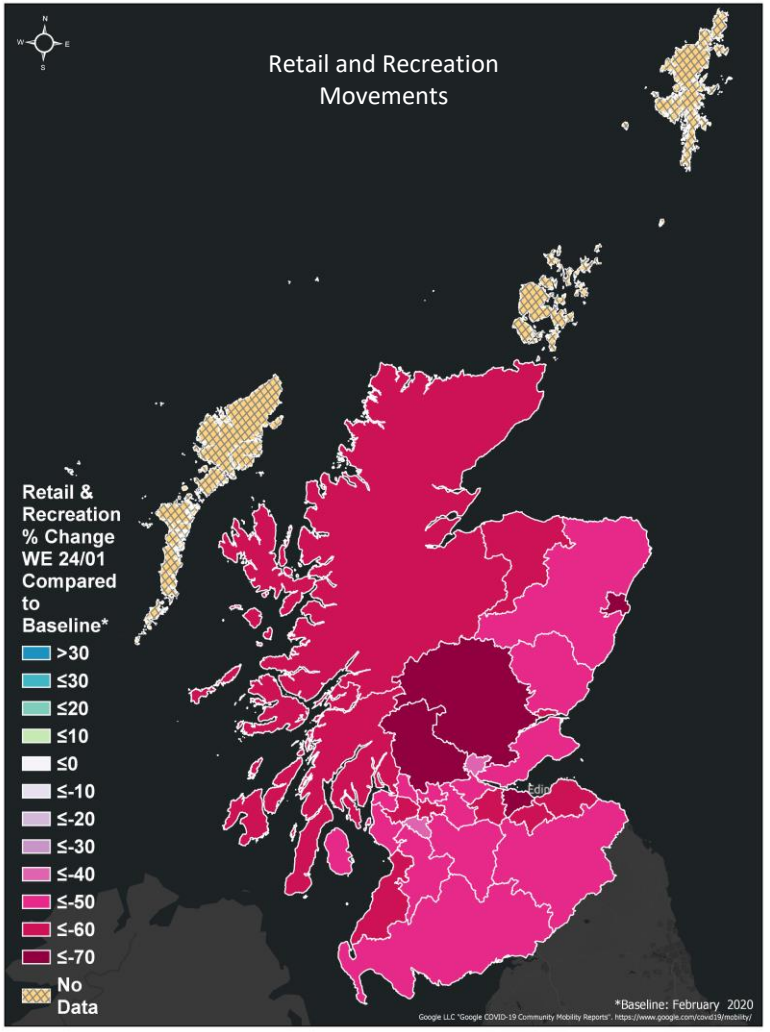
Google Movement Data for Scottish Cities

Source: Google Community Mobility Report
31 January 2021
Confidence: Low

Latest Available Data:
Week Ending 24 January 2021

Baseline: Index 100 = February 2020





DATA NOTE: Data not available for Na h-Eileanan Siar, Orkney Islands and Shetland Islands.

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COVID19 Trends in Sub-National Travel

January Report

GOOGLE TRENDS – 'Parks' and 'Workplace'

'Parks' Key Points

- There were significant data gaps for Parks movements over the month of January, with no data recorded for several non-city regions. Where data is available it shows some regional variation over the period. The majority of non-city regions recorded changes of between -8% (Highland) and 9% (North Ayrshire). However, Falkirk and Midlothian were significant outliers with increases of 21% and 36% respectively. With the exception of Glasgow (-2%), all city regions saw an increase in activity compared to December, with growth of 2% in Edinburgh, 10% in Dundee and 16% in Aberdeen.
- Parks activity in most areas was below baseline levels. The exceptions to this were Renfrewshire (12%), Falkirk (1%), South Lanarkshire (30%), and Midlothian (22%),. The most pronounced declines were in Edinburgh (-27%) and Stirling (-26%).

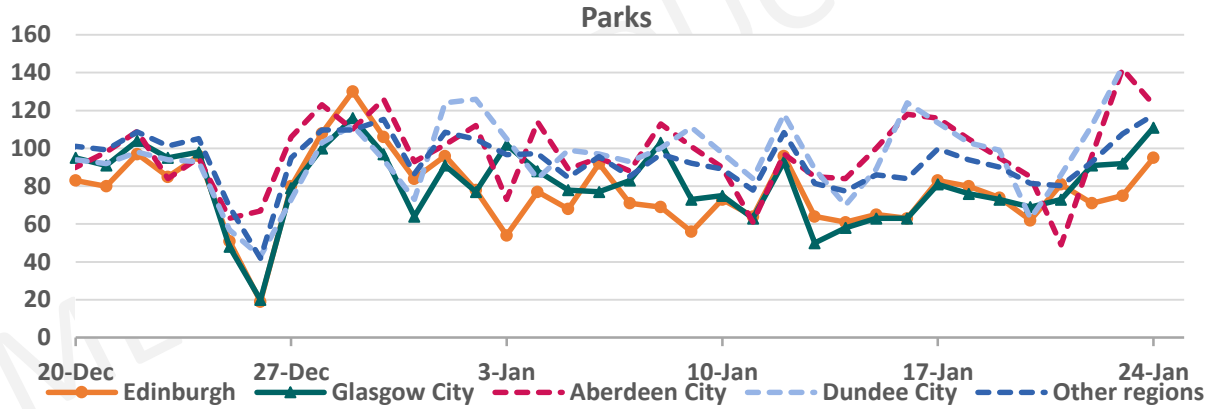
'Workplace' Key Points

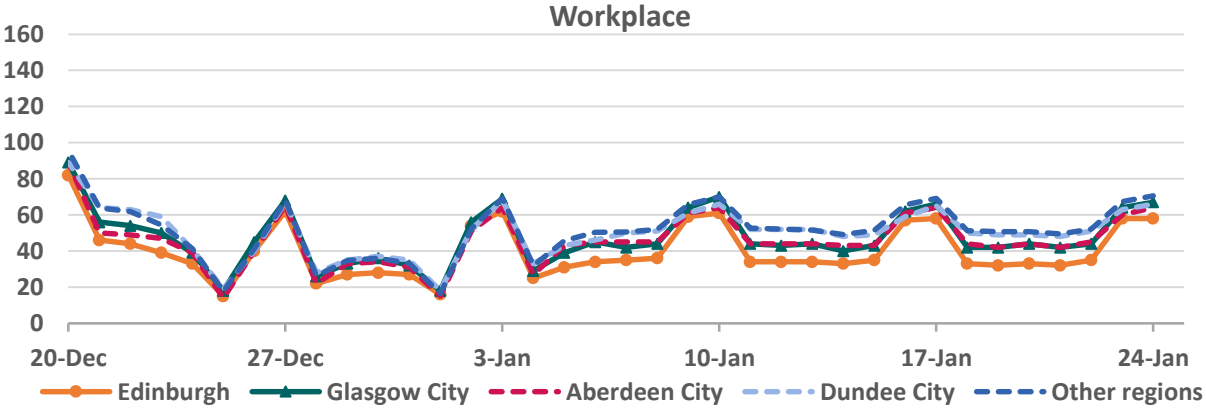
- In January, Workplace movements decreased in all areas compared to the previous month. Similar decreases were seen across most of the country and ranged between -21% (Argyll and Bute and Highland) and -9% (Orkney)
- Workplace movements also remained below baseline levels in all regions. Declines in city regions ranged between 47% (Dundee) and 60% (Edinburgh), while non-city regions recorded declines of between 35% (Orkney) and 52% (East Renfrewshire and Stirling).

Google Movement Data for Scottish Cities

Source: Google Community Mobility Report 31 January 2021
Confidence: Low

Latest available data:
Week Ending 24 January 2021
Baseline: Index 100 = February 2020





***NOTE**: Values have been calculated using a weighted population factor for Local Authorities. Other regions refers to all Scotland LAs (where data is available) excluding Edinburgh, Glasgow, Aberdeen and Dundee.*

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COVID19 Trends in Sub-National Travel

January Report

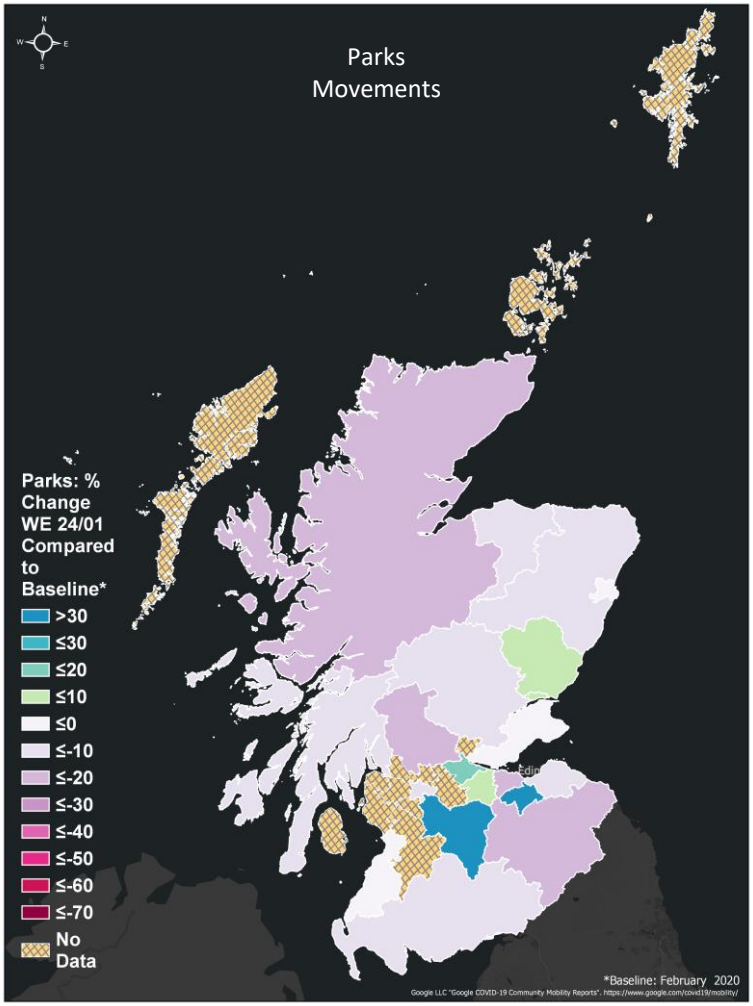
GOOGLE TRENDS – 'Parks' and 'Workplace'

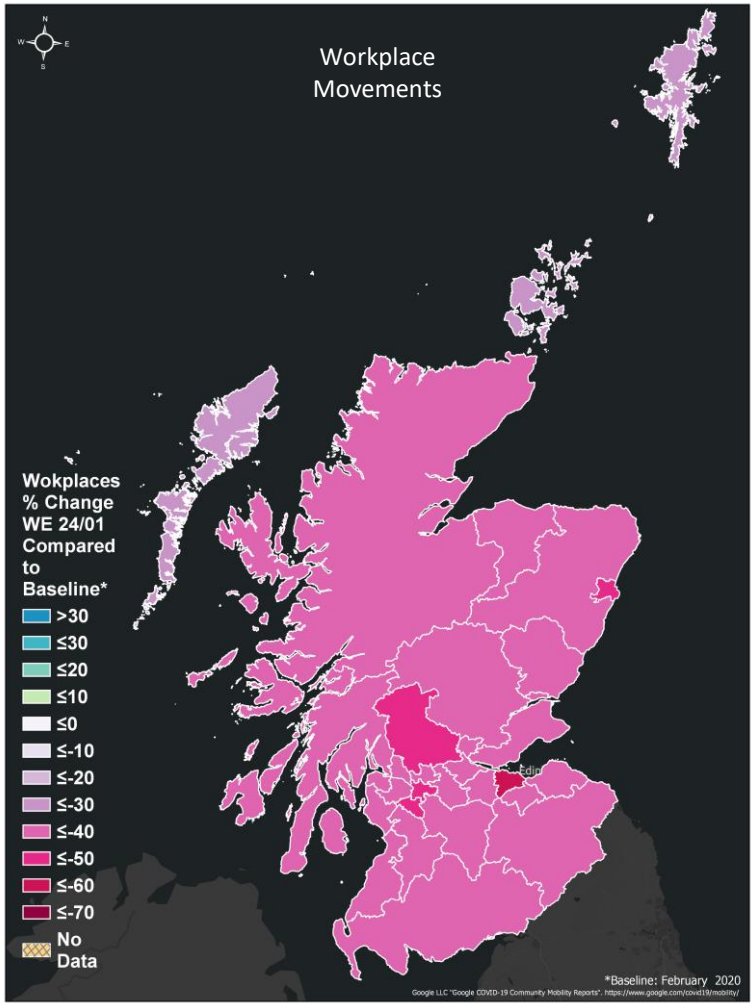
Google Movement Data for Scottish Cities

Source: Google Community Mobility Report
31 January 2021
Confidence: Low

Latest Available Data:
Week Ending 24 January 2021

Baseline: Index 100 = February 2020





DATA NOTE: Data not available for Na h-Eileanan Siar, Orkney Islands, Shetland Islands and several other Local Authorities.

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COVID19 Trends in Sub-National Travel

January Report

GOOGLE TRENDS – Mobility

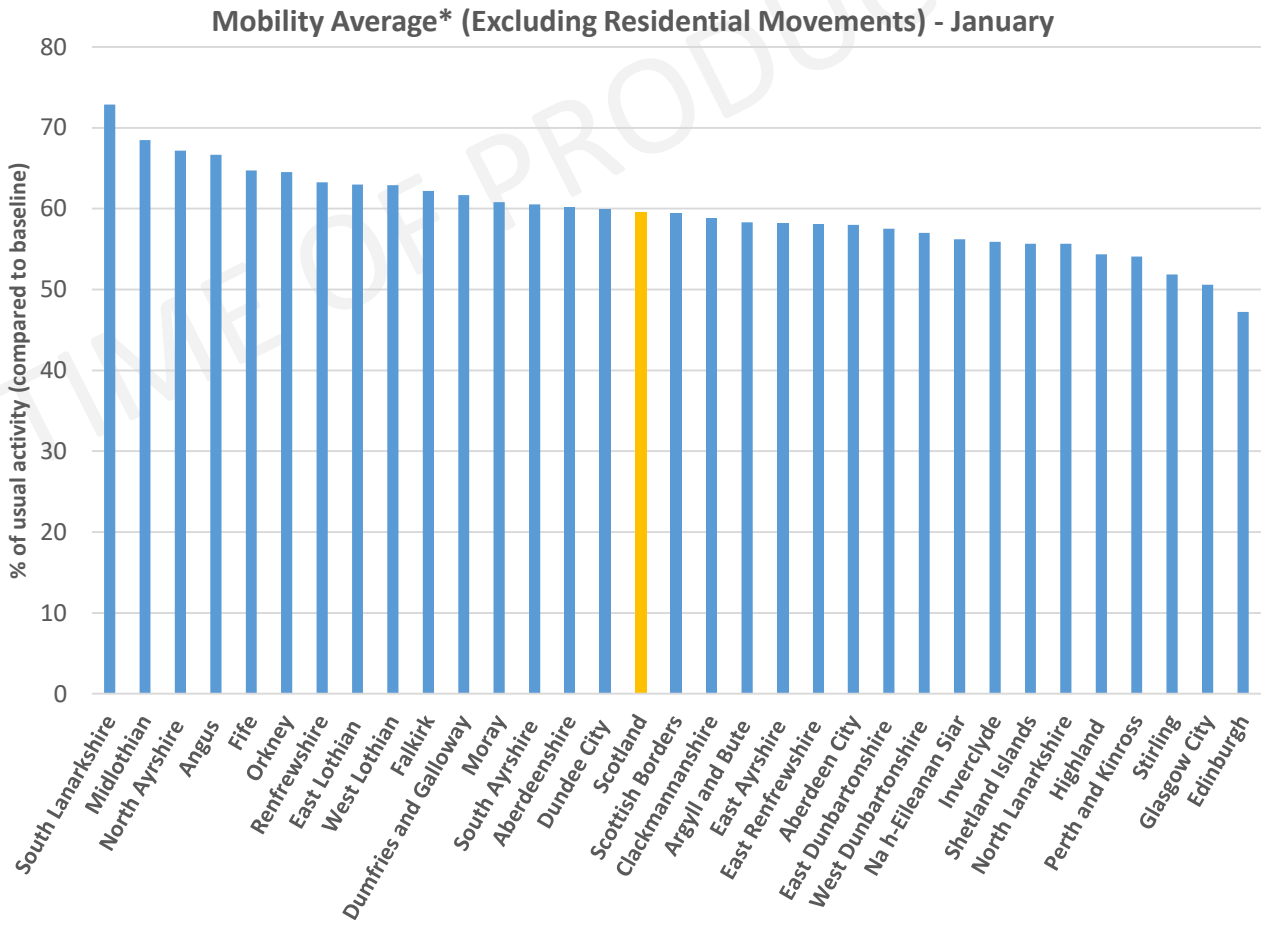
Key Points

- Excluding island regions due to limited data, all areas recorded a decline in average mobility over the month of January compared to December, with values ranging between -10% (West Dunbartonshire) and -22% (Highland).
- Comparing the mobility average for January to the baseline period of February 2020, all areas remained below baseline levels. In City regions, average mobility ranged from -40% in Dundee, to -53% in Edinburgh.
- Values significantly below baseline were also seen in all non-city regions, ranging from -27% in South Lanarkshire to -48% in Stirling.

Google Movement Data for Scottish Cities

Source: Google Community Mobility Report 31 January 2021
Confidence: Low

Latest available data: Week Ending 24 January 2021
Baseline: Index 100 = February 2020



DATA NOTE: Average mobility for island Local Authorities is based on transit and workplace movements. Data for other categories has not been published for these regions.

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COVID19 Trends in Sub-National Travel

January Report

The Small Print

Purpose and Baseline

The data in this report has been collated at short notice from a variety of sources. The data itself does not directly measure the actions promoted by the Government to address the COVID-19 pandemic such as:

- Stay at home.
- Only go outside for essential food, health and work reasons.
- Stay 2 metres (6 feet) away from other people.
- Only meet up with another household outdoors, in small numbers (max 8), including in gardens, but with physical distancing required.
- Only travel short distances for outdoor leisure and exercise with the advice to stay within a short distance of your local community (broadly within 5 miles) and travel by walk, wheel and cycle where possible.

The outcomes reported are derived from a combination of the data and professional knowledge of travel behaviours.

The baseline reflects normal conditions based on available data as follows:

- The equivalent day in 2019 and 2020 for concessionary bus, cross border traffic, subway, tram.
- The equivalent week in 2019 and 2020 for ferry passenger and vehicle carryings.
- A fixed baseline of June 2019 and 2020 for walking and cycling.
- A fixed baseline of 2-15 March for railway station footfall and the road traffic counters.
- The median of the equivalent day from 3rd January to 6th February for the Google data.

Walking and Cycling

For the walking and cycling data, available data is from counters predominantly located in Central Scotland, Tayside and Argyll & Bute and should be treated as an approximate estimate and not an accurate count for each area. The data has not been weighted to account for the difference in true populations between different locations.

Where counters do not have 2019 and 2020 data (in full or where only a partial dataset is available) figures were estimated using available information. This was achieved by averaging the change seen in other counters in that Local Authority to determine a multiplier to convert current week figures to an equivalent month in 2019 and 2020 figure.

COVID19 Trends in Sub-National Travel

January Report

The Small Print – Cont.

Train Station Data
Data is provided by Network Rail and reports the concourse footfall at Glasgow Central and Edinburgh Waverley stations.

Glasgow Subway Data
Glasgow subway data has been provided by SPT and patronage derived from ticket barriers.

Edinburgh Tram Data
Edinburgh tram have provided data on patronage derived from journey numbers.

CalMac Data
Ferries data provided by CalMac. All data within this report is unaudited and provisional. The figures within are for guidance only and should NOT be regarded as exact or quoted.

Traveline
Data is the percentage of services operating compared to the September 2018 baseline, with data coming from Traveline.

Trunk Road Traffic Data (Drakewell)
Trunk road traffic data has been provided by Drakewell. It is comprised of traffic count readings at about 400 JTC and ATC sites across Scotland.

Urban Rural Classification 2016
The Scottish Government Urban Rural Classification 2016 provides a consistent way of defining urban and rural areas across Scotland. The classification is based upon two main criteria: (i) population, as defined by the National Records of Scotland (NRS), and (ii) accessibility, based on drive time analysis to differentiate between accessible and remote areas in Scotland.

Google Movement Data

For the Google movement data this is taken from reports published by Google (https://www.google.com/covid19/mobility/). The data and methodology cannot be quality assured directly. Data has been extracted from a Google CSV file and provided on an 'as-is' basis (again it is not possible to compare directly against the source data).