All change?
Travel tracker

Wave 4 report

February-March 2021

Ben Marshall, Lore Bizgan, Glenn Gottfried

Department for Transport

Ipsos MORI

Contents

Executive Summary

Ipsos MORI conducted a UK-wide online survey during February and March 2021 on behalf of the Department for Transport as part of the *All change?* Research programme. The survey was the fourth in a series, designed in response to the Covid-19 pandemic to measure and explore the reasons for current and future changes in behaviour. *All change?* involves longitudinal analysis allowing us to detect change at the level of individual people as well as at the aggregate level.

Fieldwork for the fourth wave of *All change?* was undertaken between 23 February and 9 March 2021, following the Prime Minister's announcement of a Roadmap for easing lockdown restrictions in England. The third survey took place during November-December 2020, the second survey was undertaken during July-August 2020, and the first between May and June 2020. The latest survey asked about behaviours relating to the past 4 weeks which for most respondents was a period covering most of the month of February and the start of March 2021.

1. Did behaviours change?

Overall, as restrictions had tightened, people travelled less during February/March 2021 than they had during November/December 2020. While levels of car driving and car passenger travel in February/March were similar to those in November/December; frequent car use (of once a week or more) decreased during this period. The incidence of car driving was in line with levels during the first UK-wide lockdown in April/May 2020, but car passenger travel was significantly higher at 54% compared to 43%.

Having increased last summer, use of buses, trains and underground/metro services were lower in November/December 2020 and February/March 2021. Usage levels were significantly lower than they were in January-March 2020, before the pandemic. For example, 10% of adults travelled by train during February/March 2021, compared to 63% 12 months earlier.

As was the case during November/December 2020, car and walking all the way to a destination were the most common and most frequently used travel modes during February-March 2021. Patterns in walking and cycling also changed little between November/December 2020 and February/March 2021, and were lower than in January-March 2020, before the pandemic. However, when asked directly, respondents were more likely to have said they walked all the way to a destination more in the last four weeks (31%) compared to the period before the pandemic, than to think this had decreased (22%).

To date, the main changes in behaviour we have observed via *All change?* at the aggregate level across the UK have been how often people have travelled, and why, rather than how they have travelled. Similarly, longitudinal analysis - allowing us to analyse changes in behaviour among the group of individuals who took part in waves 3 and 4 and explore mode switch - found that most did not change how often they used different modes of transport in February/March 2021 compared to November/December 2020. For example, 65% of UK adults drove as frequently, i.e. no more and no less frequently, as they did during November/December 2020. (The equivalent proportions for those who did not change their frequency of use was 78% for travel by bus, 86% by bicycle and 88% by train.)

During the period between November/December 2020 and February/March 2021, the frequency of car driving increased among 24% of our longitudinal group and decreased for 11% of the group. People who did less driving in February/March 2021 compared to November/December 2020 were more likely to use the bus more frequently than those who did more driving (17% compared to 9%). While this is not definitive evidence of mode switch, it points to a potential association between driving less and using public transport more for a small group of our longitudinal cohort.

2. Why did behaviours change?

In February/March, shopping was the most common reason people travelled with 72% saying they travelled for this reason, significantly higher than any other reason and at a similar level to the number saying they travelled for shopping in November/December (74%).

There was an increase in travel to medical appointments – from 23% of those who travelled during November/December 2020 to 30% in February/March 2021 – likely reflecting the commencement of the vaccination programme in January. Traveling to a place of work (26%), travelling for recreation (25%) and running errands for people were the three next most frequent types of journeys – each at a similar level to November/December. Among those making journeys, the proportion of people travelling to visit friends/relatives fell compared to November/December 2020, as did those making school journeys and travelling to access services.

The latest survey shows continued low levels of comfort using public transport; 30% of the public said they would be comfortable travelling by bus in the four weeks following their completion of the survey in February/March 2021 (similar to 31% during November/December 2020) and 32% would be comfortable travelling by train (also 32% during November/December 2020). Levels of comfort in using public transport were higher among those who had used public transport frequently before the pandemic, and particularly among those who used the mode in the previous four weeks.

As at previous waves, compliance with wearing face masks/face coverings (32%), and passengers and staff following social distancing rules while travelling (27%) provide potentially important reassurance for using public transport in the next four weeks. As was the case during November-December 2020, claimed compliance was high during February/March 2021; the percentage of bus, train and underground/metro users who admitted to *not* wearing a face mask or covering while travelling ranged from 4% of bus users, to 7% of train users, and 8% of underground/metro users.

Levels of working from home influenced commuting patterns and 83% of those who had worked at home all of the time in the past 4 weeks expected to do the same in the next four weeks. Among all UK adults, 29% reported working at home all of the time in the preceding four weeks, with 13% having done so some of the time. The incidence of exclusively working from home was higher in England (30%) compared to Wales (19%) and Scotland (25%). In England, working from home exclusively was highest in London (40%) and lowest in the West Midlands (23%). Working from home exclusively during February/March 2021 was also more common

among higher income groups (and 42% among households with an income exceeding £40,000) and among those who, before the pandemic, had travelled by train once a week or more often (40%) those who had used underground/metro services this often (45%), and those who cycled (36%) once a week or more pre-pandemic. In contrast, 28% of those who drove a car once a week or more before the pandemic worked from home exclusively in February/March.

New ways of shopping developed during the first UK lockdown have continued. During April/May 2020, 59% said they shopped online more than they had done before the pandemic, 29% used home delivery more, and 60% shopped closer to home. During February/March 2021, 6% of people said that they expected to shop closer to home *less often* in the next four weeks compared to 'now', 8% expected to shop online less, and 12% expected to use a home delivery for supermarket less. In the case of shopping closer to home and online shopping, higher proportions of people expected to do this more often.

3. What next?

As in November/December 2020, there was some expectation of increased travel in the next four weeks during February/March 2021 including more frequent use of public transport. The most pronounced expected shift was for bus and train use; while 19% of people travelled by bus during February-March 2021, levels of expected use over the four week-period following the survey was six points higher, at 25%. There was an expected increase of seven points for train travel; 10% travelled by train in the previous four weeks and 17% expected to travel this way in the next four weeks. Those that had travelled by bus or train in the previous four weeks, those who had travelled these ways frequently before the pandemic (once a week or more often), and people living in London, were more likely to expect to travel by bus and train in the next four weeks.

New questions indicated the potentially significant and positive impact that the Covid-19 vaccination roll-out could have on people's willingness to use public transport. While the latest survey indicated low levels of comfort using public transport, it also showed that the majority of UK adults would feel comfortable using public transport once they (61%) and members of their household (60%) had been vaccinated, and comfort levels were even higher at the point when all adults have been offered their second dose (75%).

The majority (61%) of UK adults supported retaining the requirement to wear face coverings on public transport, even when all UK adults have been offered both vaccine doses. This also applies to social distancing, with 58% supporting retention. A majority (54%) said they would feel comfortable travelling overseas when all adults have been offered their second dose compared to 75% in the case of public transport. Four in ten (40%) said that a requirement that all those travelling overseas had to have a Coronavirus vaccine would make them more likely to travel abroad.

Introduction

This report presents findings from analysis of a UK-wide survey commissioned by the Department for Transport (DfT) and undertaken during February-March 2021. The survey is part of a longitudinal programme of research for DfT including qualitative and quantitative components; Ipsos MORI will follow-up and track changes in behaviour among the same group of people over time.

Findings from the first, second and third surveys, and from qualitative research conducted during September-October 2020, have been published by DfT[1].

The *All change?* research programme will inform DfT's response to COVID-19, planning for infrastructure investment and strategic priorities including lower carbon behaviours and the 'levelling-up' agenda. It will do this by identifying how different groups of people in different types of areas including rural areas and different parts of the UK, have been impacted, how they are responding to COVID, and how they can be best supported.

All change? has been designed to address several key research questions which form the structure of this report:

1. How often and why did people travel?
2. How has behaviour changed?
3. Why did this behaviour change?
4. What are likely behaviours in the next 4 weeks and why?
5. What are levels of confidence in travelling in the next 4 weeks?
6. What are people's longer-term travel plans?
7. Will longer-term behaviours be active and sustainable?

New questions relating to the Covid-19 vaccination programme included at Wave 4 were designed to address the extent to which roll-out would improve confidence levels in terms of travelling by public transport.

Survey methodology

During spring 2020, Ipsos MORI conducted the first online survey involving 4,059 UK adults aged 16-75 years old. Sampling was structured to secure at least 2,000 completed surveys in England, 1,000 in Scotland, 650 in Wales and 200 in Northern Ireland to allow for more robust comparisons between different countries within the UK, supplemented by a booster sample of ethnic minority groups.

As at waves 2 and wave 3, wave 4 respondents were drawn from those who had taken part in previous waves and agreed to be recontacted. While waves 1 and 2 involved 'top-up' sampling to boost the overall sample to 4,000, this was not the case at wave 3 when the sample was drawn exclusively from our longitudinal cohort and contained no 'fresh' sample (meaning that

[1] COVID-19 travel behaviour during the lockdown: https://www.gov.uk/government/publications/covid-19-travel-behaviour-during-the-lockdown

there is no ‘cross-sectional’ analysis this wave). At wave 4, a ‘top-up’ exercise was undertaken to bolster the numbers among a selection of groups and geographies available for recontact at wave 5 (this reached 564 respondents).

Of the 3,388 taking part at wave 4, 1,742 had previously taken part at wave 1, wave 2 and wave 3 (52%), 550 had taken part at waves 2 and 3, and 205 at waves 1 and 3.

We present results from analysis involving all respondents but also a more detailed longitudinal look at changes in behaviour among the 2,497 respondents who took part at wave 3 and wave 4 in order to understand the extent of most recent change. In particular, sections 2.5 and 2.6 of this report focus on longitudinal analysis in order to address the second research question - h*ow has behaviour changed?*

Longitudinal analysis allows us to analyse changes in behaviour over time with the same people, permitting the detection of individual, participant-level changes between waves rather than aggregate-level changes (the latter can mask change e.g. some people switching from one mode to another and a similar proportion doing the opposite would have a neutral net effect overall).

Further detail regarding the profile of the overall sample, particular demographic groups and nations of the UK, is provided in Appendix A.

Fieldwork dates, ‘lockdown’ restrictions and reference periods

Wave 4 survey fieldwork was undertaken between **23 February-9 March 2021** in England, Scotland, Wales and Northern Ireland. This followed fieldwork as shown in Table 1 below:

Table 1: Survey waves and fieldwork dates

Wave	Fieldwork dates
1	**15-22 May 2020** (England, Scotland and Northern Ireland) **28 May-4 June 2020** (Wales)
2	**21 July-3 August 2020**
3	**27 November-7 December 2020**
4	**23 February-9 March 2021**

Several important developments occurred between the survey waves. While wave 1 took place during the full, UK-wide national lockdown period, wave 2 came after the easing of restrictions including the opening of pubs, restaurants and hairdressers on 4 July and many people returning to places of work. Two households were allowed to meet up and social distancing relaxed from 2 metres to ‘1 metre plus’ in England. Northern Ireland allowed the opening of

pubs, restaurants and hairdressers a day earlier, on 3 July, in Wales (outside only) on 13 July and Scotland on 15 July.

On 24 July, face coverings/masks became compulsory in shops and most other enclosed public places in England during the wave 2 fieldwork period (having already been mandatory on public transport since 15 June) and restrictions were placed on Greater Manchester and parts of East Lancashire and Yorkshire (30 July) following the introduction of 'local lockdown' restrictions in Leicester on 29 June.

Wave 3 fieldwork was conducted during a second 'lockdown' in England which started on Thursday 5 November and finished on Wednesday 2 December. There were some important similarities and differences compared to the first, UK-wide, lockdown – for example, mixing with other households inside homes was not allowed, except for childcare and other support, but people who shielded in March did not have to shield again in late 2020 (although clinically vulnerable groups and over-60s were advised to limit social contacts and follow rules carefully).

In advance of fieldwork for wave 4, the Prime Minister announced the third lockdown in England on the 4th of January 2021 (which took effect on 6 January), with Wales, Scotland and Northern Ireland also using lockdown restrictions. The Government's Roadmap for England was announced just before the start of fieldwork on 22 February. At the point that fieldwork was completed, 22.8 million people had received first doses of the Covid-19 vaccine.

At some questions, respondents were asked about behaviours, particularly the frequency of using different modes of travel, relating to the *past 4 weeks* as well as the period before the UK-wide lockdown (this reference period was defined as "between January and March 2020").

Reflecting the fieldwork dates for previous waves, our report describes these behaviours as pertaining to **April/May 2020** (the 4 weeks prior to wave 1 fieldwork coinciding with the first UK-wide lockdown), **June/July 2020** (a four-week period during which restrictions had been eased), **November/December 2020** (a four-week period during which tighter restrictions were in place) and **February/March 2021** (another period of lockdown with the roll-out of the vaccination programme). Otherwise, we describe findings as relating to wave 3 and wave 4 surveys where retrospective reference periods were not used.

Modes of transport

The survey covered the following modes (some of these are abbreviated within our commentary). These were presented to respondents at the first question in the survey (and at subsequent questions). To note, 'car as a passenger' was not defined any further but did sit separately from taxi and shared transport modes.

Car as a driver

Car as a passenger

Van/lorry

Motorbike/moped

Informal car-pooling (e.g. individuals that know each other and share a similar journey route)

Car club (e.g. ZipCar, Co-wheels) or ride-sharing apps (e.g. liftshare.com, blablacar.com)

App-based minicab services e.g. Uber

Taxi/black cab/minicab/private hire

Bus

Aeroplane/flying

Ferry/other water-based transport

Train

Tram

Underground rail/metro

Cycling (including e-bike)

Walking all the way to a destination or wheeling by a wheelchair or motorised scooter

Interpretation of data and statistical reliability

When interpreting survey results, we should be mindful that samples for Scotland, Wales and Northern Ireland are derived from initial *booster samples* designed to generate larger sample sizes than would otherwise have been achieved. As such, they allow for comparison with other parts of the UK rather than providing stand-alone survey datasets.

For the wave 4 survey overall, we can expect an overall sampling tolerance of +/- 1.7 percentage points for a 50% finding at the '95% confidence interval'. This will vary for sub-groups and geographies according to their sample sizes. Our commentary on changes in behaviour between waves and among groups and geographies focuses on statistically significant changes and differences, but not exclusively so and we have identified potentially important findings that are not statistically significant. Further detail is provided in Appendix B.

As at wave 3, we applied a bespoke weighting scheme to the wave 4 data, and the longitudinal cohort (the sub-sample of respondents who took part at waves 3 and 4), reflecting attrition between waves and the difference in profile between the achieved sample at wave 4 and the original 3,866 who agreed to be recontacted after completing the wave 1 survey as well as the (matched) profile of the overall, UK-wide samples of 4,059 and 4,061 who took part in waves 1 and 2 respectively.

This accounts for any differences in 'return' rates among the various groups within the sample and allows us to draw conclusions about the incidence of behaviours among the UK adults within sampling tolerances.

Where percentages do not sum to 100 this may be due to multi-code responses or rounding. This is also the case in terms of combinations not summing to their constituent parts e.g. the percentage who said they were comfortable travelling by public transport summing to the percentage who said they were very comfortable and the percentage who said they were fairly comfortable.

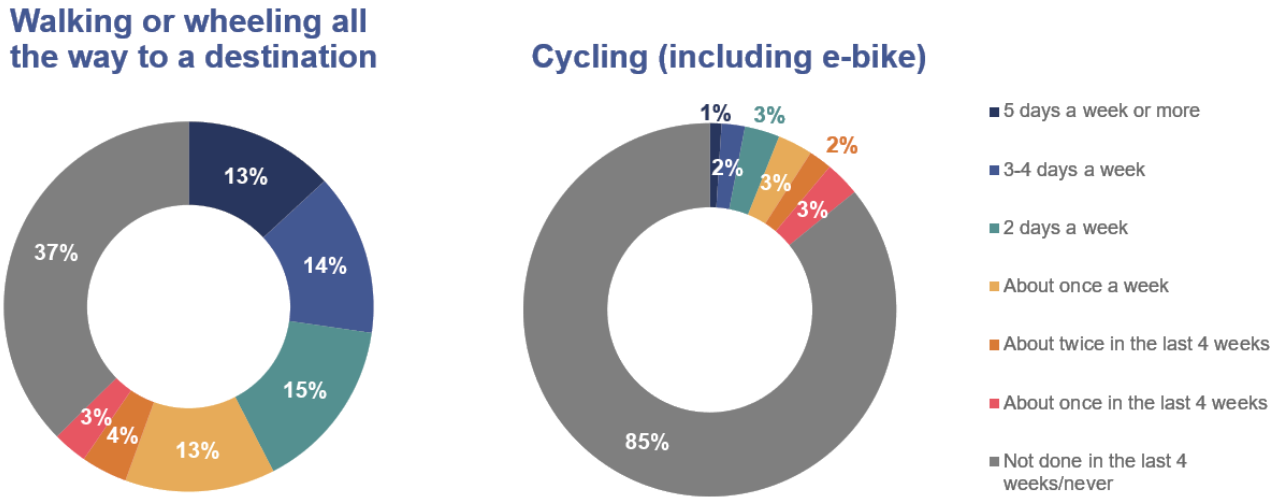
1. How often and why did people travel?

As with previous waves of *All change?*, driving and walking or wheeling a wheelchair or motorised scooter all the way to a destination were the most commonly used modes of transport during February/March 2021. The frequency of travel across all modes was very similar to that in November/December 2020, reflecting the lockdown in England and similar restrictions in other parts of the UK. In this section, we provide details of transport use across the most frequently used modes during February/March 2021, and we also describe the main reasons people gave for using each mode.

1.1. Active travel

Almost two-thirds (63%) of the UK public walked or wheeled a wheelchair or motorised scooter all the way to a destination at least once during the past four weeks in February/March 2021 and 56% did this once a week or more often. Weekly travel frequency was split between 13% travelling this way five days a week or more, 14% did this 3-4 days a week, and 15% said they did this two days a week or more. Just over a third (37%) said they did not travel by this mode in the last four weeks compared with a majority (85%) who said they did not cycle in the previous four weeks.

Figure 1: Frequency of active travel during February/March 2021



Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021

A majority (62%) of those who travelled for recreation reasons or to keep fit, walked all the way to a destination while 12% cycled for this reason. Cycling was also a popular mode of choice among students who travelled to a place of education (15%).

Walking all the way to a destination was done for a variety of reasons; notably, 36% of those who met up with people walked to their destination, as did 35% of those who went shopping and 32% of those going on holiday or a day trip somewhere. Similarly, 29% of those who travelled to access services such as hairdressers, libraries, estate agents and banks, walked to their destination, and so did 36% of those who travelled to a place of education (students).

1.2. Travel by car and taxi

Travelling by car as a driver and as a car passenger were among the most common ways of travelling during February/March 2021, along with walking. Just over six in ten, 63%, said they drove a car or walked all the way to a destination at least once in the last four weeks of February/March 2021, 54% were a passenger in a car as often.

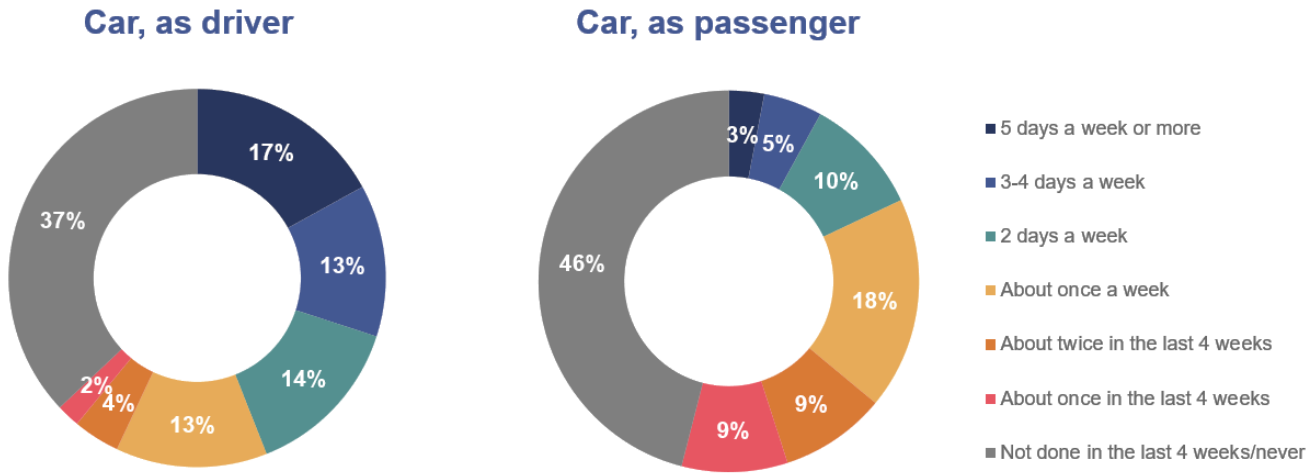
Over half, 57%, said they drove a car at least once a week while 35% travelled as often as a passenger in a car. While 17% said they drove a car five days a week or more, 13-14% did this between once a week and 3-4 days a week. Most of those travelling as a car passenger did this about once a week (18%) with one in ten (10%) 2 days a week or more.

Driving was the mode of choice for those picking up or dropping off children to school or nursery (done by 71% travelling for this reason), for those giving lifts to friends and family for reasons other than school drops/pick-ups (68%) and for two thirds of those who commuted to a place of work (66%). Over half drove for shopping (58%) and for visiting friends and family (53%).

Around a third of those who travelled to medical, hospital or dentist appointments (32%) travelled as a passenger in a car, and 30% of those who travelled for shopping and to a place of education as students travelled this way.

One in ten (10%) said they used a taxi/black cab at least once in the last four weeks while 8% used app-based minicab services such as Uber as often.

Figure 2: Frequency of driving or travelling as a car passenger during February/March 2021



Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021

Sharing journeys

Six in ten UK adults (60%) said they shared a journey in a car or van with someone else on at least one occasion during February/March 2021, excluding all journeys by taxi/black cab/minicab/private hire vehicle as well as any journeys made using app-based minicab services. This was higher among younger adults aged 16-34 years old (65%) compared with the UK average (60%).

Of those who shared a journey in a car or van with someone else, almost eight in ten (79%) said they did this with members of their household; around a quarter (24%) said they shared at

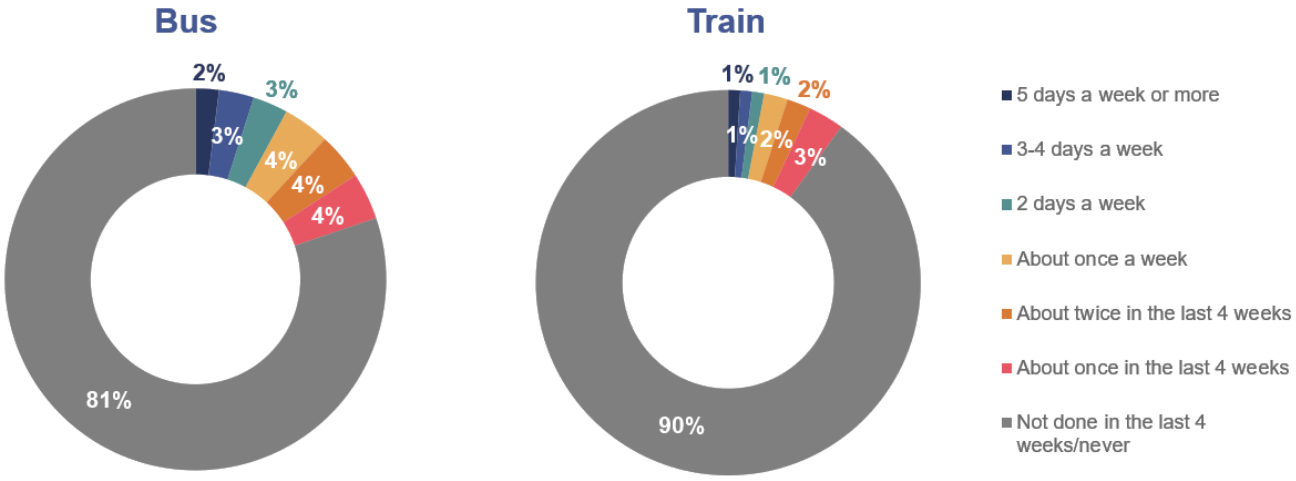
least one journey with someone in their support bubble and 6% said they did this with a person they didn't live with/was not part of their support bubble.

1.3. Travel by public transport

One in ten, 10%, said they travelled by train at least once in the last four weeks and twice as many (19%) said they did this by bus, and 6% used the underground/metro.

Similar to previous waves, non-use was high across the UK – the majority (94%) reported *not* using the underground/ metro at all in the previous four weeks, the train (90%) and just over eight in ten (81%) said they did not travel by bus.

Figure 3: Frequency of bus and train use during February/March 2021



Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021

One in four (20%) students who travelled to a place of education did so by bus while one in eight (12%) of those commuting to a place of work travelled by this mode.

Among those who travelled to access entertainment, arts and events, 28% did this by bus, 15% by train and 3% travelled by underground/metro. Of the 1% of the UK public, who travelled for a holiday or day trip somewhere, 14% did this by train.

2. How has behaviour changed?

This section presents the extent and nature of the changes in travel behaviour based on cross-sectional and longitudinal analysis, as lockdown restrictions were present in England and similar restrictions applied across the UK. We compare behaviours during February/March 2021 (wave 4) with November/December 2020 (wave 3) when similar, although not identical, lockdown restrictions were in place. The lifting of lockdown restrictions was planned across the UK after the fieldwork period for the fourth survey, starting with the return to school on 8th March in England.

We also compare travel behaviour in February/March 2021 with January-March 2020, the period before the start of the first UK-wide lockdown and describe the main differences among selected demographic sub-groups and geographies, starting with active travel and car and taxi travel, before finishing with public transport.

2.1. Overall change

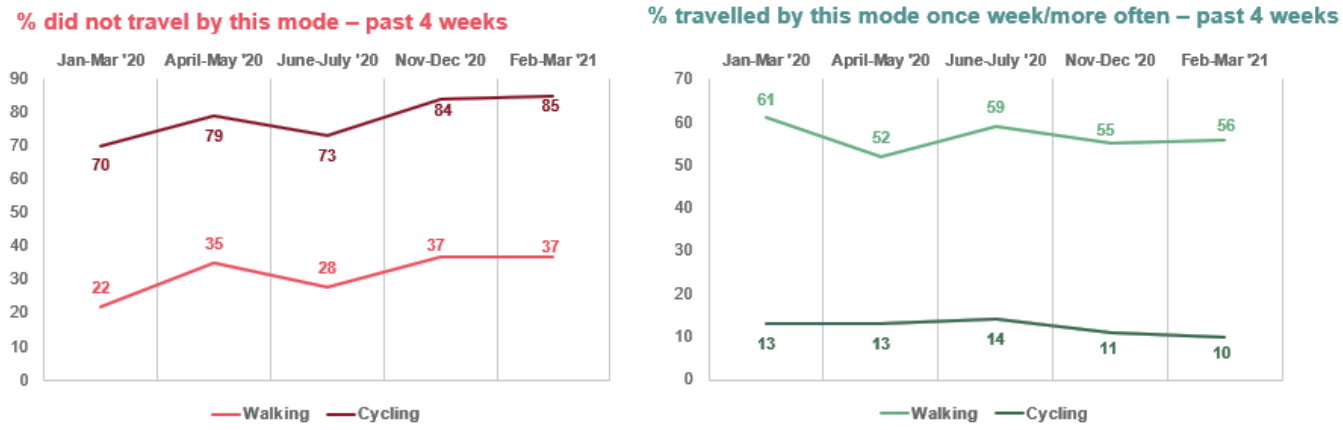
The frequency of travel across all modes during February/March 2021 broadly reflected a continuation of behaviours from November/December 2020; during both periods, lockdowns or similar restrictions were in place across the UK, limiting travel to help reduce the spread of Coronavirus.

Following a small increase in active travel modes used during June/July 2020, travel by these modes decreased again during the tightening of restrictions and winter months (November/December 2020). Levels of active travel reported for February/March 2021 were in line with those for November/December 2020. As shown in Figure 4 below, 56% of people walked at least once a week during the previous four weeks in February/March 2021, in line with 55% in November/December and lower than 59% in June/July 2020. The figures for cycling followed a similar pattern; while 10% said they cycled once a week or more often during February/March 2021, this was in line with the 11% who did this in November/December but below 14% in June/July 2020.

Reflecting the restrictions in place at the time when fieldwork was conducted, more people, 37%, reported *not* travelling by car as a driver in February/March 2021 in line with 35% in November/ December and higher than 33% in June/July 2020. The figures for travel as a car passenger were similar for February/March 2021 and November/December 2020 - 46% and 44%, respectively – with incidence of non-use much higher during these time-periods compared to 31% in June/July.

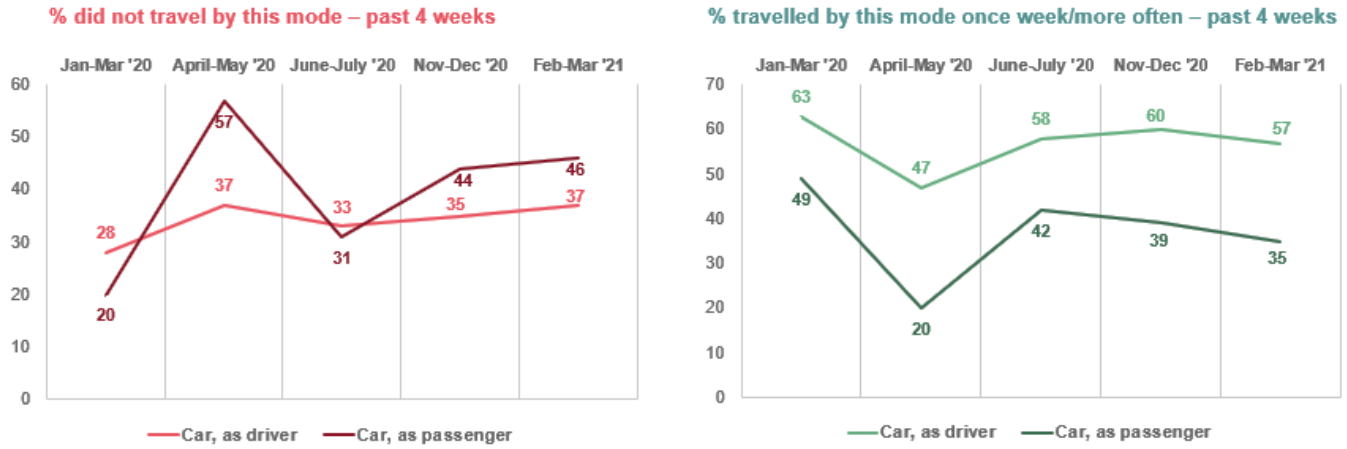
Driving by car and being driven remained among the three most frequently used modes during February/March 2021. Furthermore, the frequency of driving and being driven as a passenger in a car was also higher compared to the first UK-wide national lockdown – 57% and 35% in February/March 2021 travelled these ways once a week or more often respectively, compared with 47% and 20%, in April/May 2020 (Figure 5).

Figure 4: Frequency of active travel use during February/March 2021 compared with November/December 2020, June/July 2020, April/May 2020 and January-March 2020



Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown).

Figure 5: Frequency of car use (as driver or passenger) during February/March 2021 compared with November/December 2020, June/July 2020, April/May 2020 and January-March 2020



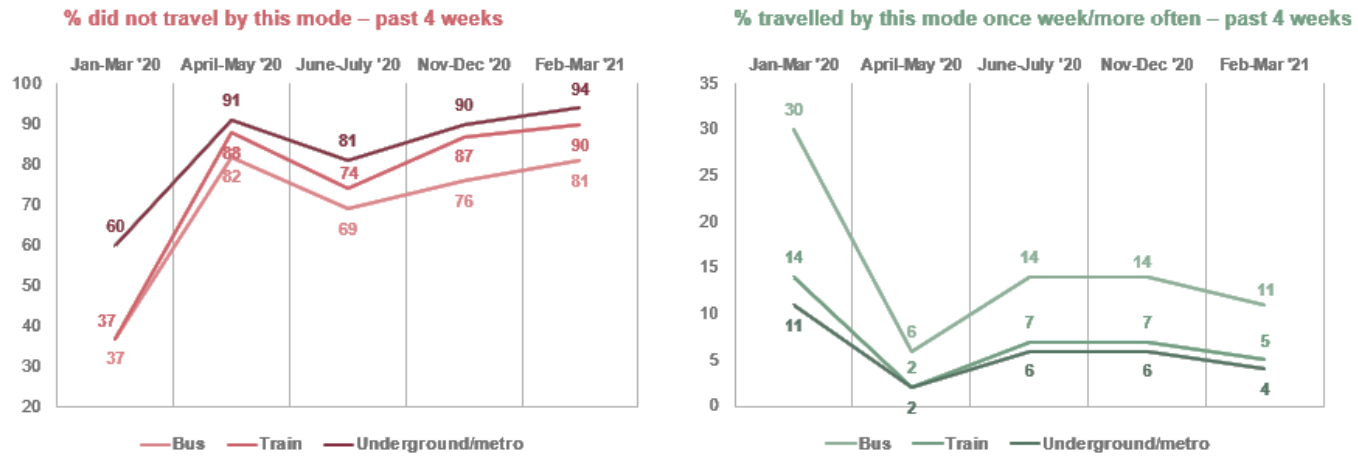
Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown).

The frequency of using public transport modes increased during June/July 2020 following the easing of the first UK-wide lockdown restrictions. This was also evident in the significant decrease in the proportion of people saying they did *not* travel by this mode in the last four weeks in June/July compared to April/May 2020; 69% compared with 82% for bus, 74% against 88% for train, and 81% versus 91% for underground/metro. In November/December 2020, the proportion of people who said they did not travel by public transport in the last four weeks increased to 76% for bus, 87% for train and 90% for underground/metro.

This downward trend continued in February/March 2021 in terms of use of train and underground/metro services with non-use surpassing levels reached during the first national

lockdown - 90% compared with 88% for train in April/May 2020, and 94% compared with 91% for underground/metro. In February/March 2021, only 4% of the UK public reported using underground/metro services once a week or more often in the last four weeks, 5% used the train this often, and 11% used a bus at least once in the last four weeks.

Figure 6: Frequency of public transport use during February/March 2021 compared with November/December 2020, June/July 2020, April/May 2020 and January-March 2020



Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown)

2.2. Active travel

There was little change between November/December 2020 and February/March 2021 in the proportion of people saying they walked/wheeled all the way to a destination or cycled - 63% walked during November/December 2020 and, again, in February/March 2021; 15% cycled during November/December 2021 and 16% did so in February/March 2021.

Table 2 shows the proportion of people within various subgroups who walked or used a wheelchair all the way to a destination in the period before the first UK-wide lockdown i.e. January-March 2020, followed by equivalent behaviours in the previous four weeks for each of the four survey waves covering April/May 2020, June/July 2020, November/December 2020 and February/March 2021. It shows that the incidence of walking was similar in April/May 2020, November/December 2020 and February/March 2021. In June/July, walking or wheeling all the way to a destination increased significantly, but was below pre-pandemic levels (January-March 2020).

The incidence of walking all the way to a destination during February/March 2021 among subgroups of interest was similar to that during November/December 2020.

Walking decreased in Wales between the last two waves – 50% of people did this in February/March compared with 57% in November/December.

Table 2: % who walked/wheeled all the way to a destination during the last 4 weeks* – selected groups and geographies

	January -March 2020	April/ May 2020	June/ July 2020	November/ December 2020	February /March 2021	+/- Change: Nov/Dec 2020 – Feb/ Mar 2021
All UK	78	65	72	63	63	+0
England	79	66	73	64	65	+1
Scotland	76	61	69	61	63	+2
Wales	75	62	68	57	50	-7
Northern Ireland	71	51	63	50	56	+6
16-34	84	71	76	64	67	+3
35-54	78	64	73	62	61	-1
55-75	74	62	68	61	62	+1
People with a disability	79	68	71	60	61	+1
Ethnic minority groups	77	61	73	60	60	0
Working full/part-time	78	64	71	63	62	-1
Low income household	75	66	76	63	63	0
Don’t own a car/bicycle	84	81	82	75	71	-4

Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown).

The proportion of those who said they cycled in the last four weeks in February/March 2021 was in line with November/December 2020. Notably, those aged 35-54 years old reduced their cycling between the last two waves from 17% to 14%, and those who don’t own a car or a bicycle from 5% to 2% (see Table 3).

Overall, the incidence of cycling was higher during the first UK-wide lockdown (21% in April/May 2020) compared to November/December 2020 (16%) and February/March 2021 (15%) when similar restrictions were in place. During these periods, cycling was significantly lower than the immediate pre-pandemic period (30% in January/March 2020) and in June/July 2020 (27%), when restrictions were eased; levels of cycling in winter February/March 2021 were half those of 12-months earlier in January-March 2020. These trends suggest that cycling may have been influenced by several factors including working and commuting patterns, Covid-19 restrictions and the changing seasons.

Table 3: % who cycled during the last 4 weeks* – selected groups and geographies

	January -March 2020	April/ May 2020	June/ July 2020	November/ December 2020	February /March 2021	+/- Change: Nov/Dec 2020 – Feb/ Mar 2021
All UK	30	21	27	16	15	-1
England	31	21	27	17	15	-2
Scotland	26	18	27	13	11	-2
Wales	27	18	24	14	14	0
Northern Ireland	27	17	25	8	9	+1
16-34	38	29	38	21	21	0
35-54	31	21	25	17	14	-3
55-75	20	12	18	10	10	0
People with a disability	24	17	22	13	11	-2
Ethnic minority groups	36	26	38	22	19	-3
Working full/part-time	32	23	30	18	16	-2
Low income household	27	20	26	13	12	-1
Don’t own a car/bicycle	12	6	10	5	2	-3

Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown).

2.3. Travel by car

Tables 4 and 5 show the proportion of people who drove a car and travelled in a car as a passenger, in the previous four weeks before each of the four waves. The proportions of those who travelled by car as driver (65%) and by car as passenger (56%) during February/March 2021 were similar to those in November/December 2020 – 56% to 54% respectively.

Table 4 shows the largest decrease in car driving was among younger adults aged 16-34 – down from 60% in November/December 2020 to 52% in February/March 2021.

Across the four UK nations, driving was most common in Wales (71%) and Northern Ireland (69%). Levels of car driving in Scotland in February/March 2021 were in line with those during November/December 2020 - (66% and 65%) - which was also the case in England (62% and 65%).

Table 4: % drove a car during the last 4 weeks* – selected groups and geographies

	January-March 2020	April/ May 2020	June/ July 2020	November/ December 2020	February/ March 2021	+/- Change: Nov/Dec 2020 – Feb/ Mar 2021
All UK	72	63	67	65	63	-2
England	71	63	67	65	62	-3
Scotland	68	61	67	65	66	+1
Wales	76	72	74	72	71	-1
Northern Ireland	82	80	75	74	69	-5
16-34	64	53	63	60	52	-8
35-54	71	65	65	63	63	0
55-75	80	72	76	75	75	0
People with a disability	68	60	62	58	59	+1
Ethnic minority groups	64	57	60	58	54	-4

	January-March 2020	April/ May 2020	June/ July 2020	November/ December 2020	February/ March 2021	+/- Change: Nov/Dec 2020 – Feb/ Mar 2021
Working full/part-time	79	71	75	74	73	-1
Low income household	57	49	52	49	49	0
Don't own a car/bicycle	15	3	12	7	5	-2

Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown).

Travelling by car as a passenger decreased across the board between November/December 2020 and February/March 2021. Travelling this way was least common in Scotland where it was done by 50% of people compared with 54% in England, 56% in Wales and 60% in Northern Ireland. Reductions were most significant in Wales - from 65% in the previous wave to 56% - with Northern Ireland and Scotland following a similar trend, down from 66% to 60% and 55% to 50% respectively.

Those who don't own a car or bicycle and those from ethnic minority groups significantly reduced how often they travelled as a car passenger between November/December 2020 and February/March 2021. Over this period, the proportion of those who don't own a car or bicycle who travelled as a car passenger fell from 36% to 27% and, among ethnic minority groups, from 47% to 42%.

There were similar declines over this period among people with disabilities and those in employment; from 55% to 50% and 58% to 53% respectively.

Table 5: % travelled as a car passenger during the last 4 weeks* – selected groups and geographies

	January -March 2020	April/ May 2020	June/ July 2020	November/ December 2020	February /March 2021	+/- Change: Nov/Dec 2020 – Feb/ Mar 2021
All UK	80	43	69	56	54	-2
England	80	43	69	56	54	-2
Scotland	78	41	68	55	50	-5
Wales	81	44	70	65	56	-9
Northern Ireland	79	54	78	66	60	-6
16-34	86	56	83	66	67	1
35-54	79	38	64	51	47	-4
55-75	73	35	61	51	47	-4
People with a disability	77	43	69	55	51	-4
Ethnic minority groups	82	51	74	62	54	-8
Working full/part-time	81	42	70	58	53	-5
Low income household	70	37	61	47	42	-5
Don’t own a car/bicycle	66	28	49	36	27	-9

Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown).

2.4. Public transport

As shown in Table 6, bus use in February/March 2021 was higher than average among those who don't own a car or a bicycle (44%), among those from ethnic minority groups (38%), and those from low-income households (26%), reflecting a higher reliance on public transport among these groups.

Across the UK, bus use decreased from 24% in November/December 2020 to 19% in February/March 2021. Use of this mode was most common in Scotland - 29% compared with 24% in England, 16% in Wales and 13% in Northern Ireland - but by February/March 2021, the incidence of bus use in Scotland was lower than that in England (16% versus 19%).

Levels of bus use decreased among younger adults aged 16-34 by 8 percentage points, from 31% in November/December 2020 to 23% in February/March 2021 - however, this age group used the bus more often compared with older age groups. Nearly a quarter, 23%, did so, compared to 16% of those aged 55-75 years old and 17% of those aged 35-54.

Bus use decreased during this period among several groups; the fall among those in work was statistically significant (from 23% to 19%).

Table 6: % travelled by bus during the last 4 weeks* – selected groups and geographies

	January -March 2020	April/ May 2020	June/ July 2020	November/ December 2020	February /March 2021	+/- Change: Nov/Dec 2020 – Feb/ Mar 2021
All UK	63	18	31	24	19	-5
England	63	19	31	24	19	-5
Scotland	66	16	32	29	16	-13
Wales	50	11	26	16	15	-1
Northern Ireland	57	19	25	13	8	-5
16-34	72	25	42	31	23	-8
35-54	58	17	26	20	17	-3
55-75	58	12	25	20	16	-4
People with a disability	61	18	28	23	20	-3

	January -March 2020	April/ May 2020	June/ July 2020	November/ December 2020	February /March 2021	+/- Change: Nov/Dec 2020 – Feb/ Mar 2021
Ethnic minority groups	75	32	53	39	38	-1
Working full/part-time	61	18	32	23	19	-4
Low income household	63	27	37	29	26	-3
Don't own a car/bicycle	89	38	52	49	44	-5

Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown).

2.5. Longitudinal analysis

As restrictions tightened, people travelled less during February/March 2021 than they had during November/December 2020. Car driving and car passenger travel both decreased, as did the proportion of frequent car users – that is, those who travelled by car once a week or more often.

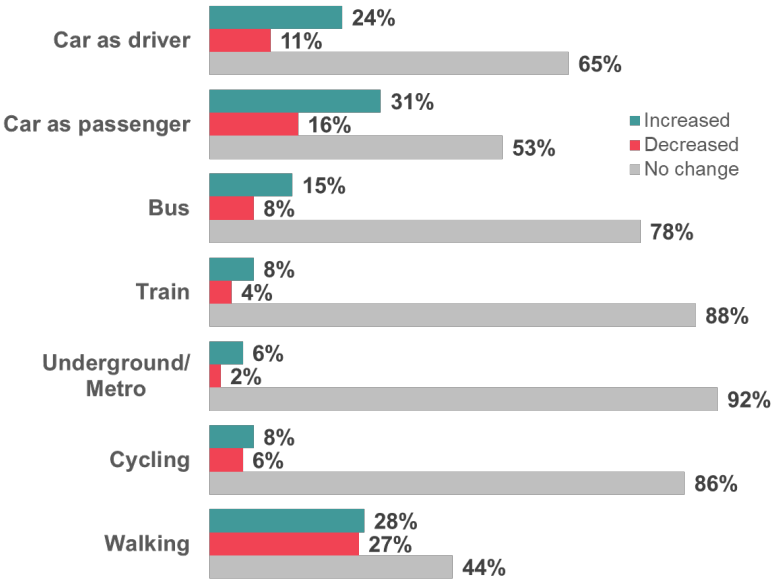
As found in previous *All change?* reports, longitudinal analysis allows us to look at behaviour change at an individual level; showing us how often people used different modes of travel in February/March 2021 compared to how often the same people used these modes previously. This section focuses on the longitudinal group and changes individuals made between November/December 2020 and February/March 2021 in frequency of travelling by car, public transport and active travel.

Travel by car

Figure 7 shows that the majority (65%) of the longitudinal group (survey participants in both the November/December 2020 and February/March 2021 survey waves) did not change how often they travelled as a car driver. While one in ten (11%) of this longitudinal group decreased their frequency of car driving, over this period nearly a quarter (24%) increased how often they drove. There are similar patterns for car passenger travel; for the majority (53%) it did not change, nearly a third (31%) increased how often they did this, and it decreased for 16% during this period.

Figure 7: Travel frequency by selected modes among the longitudinal cohort – February/March 2021 vs November/December 2020

The chart shows the % of our longitudinal group who increased, decreased or did not change how often they travelled by each mode in February-March 2021 compared to November-December 2021.



Source: Ipsos MORI/DfT 2,497 UK adults who participated in Wave 3 and Wave 4

Older people - those aged 55-75 - were among those who were most likely to have increased how often they drove a car between November/December and February/March (29%) compared with 24% among adults overall. Those in Wales were also more likely than average to have increased how often they drove during this period; 31% did this compared with 24% overall. Three in ten (30%), of those who had received a vaccine increased car driving, in line with the proportion. 27%, among those who had not yet been invited.

Men and those from ethnic minority backgrounds were most likely to have decreased their driving between November/December and February/March. One in eight, 13%, of men decreased their driving compared with 9% of women, as did 17% of those from ethnic minorities.

There is some overlap between car driving and car passenger travel between November/December and February/March. For example:

- A third (32%) of people who increased their frequency of car driving during this period also increased the frequency they travelled as a car passenger (while frequency decreased for 16% and remained the same for 52%).
- Similarly, 38% of people who decreased how often they drove a car, increased the frequency they travelled as a car passenger (while frequency decreased for 26% and remained the same for 37%).
- Among those who increased how often they travelled as a car passenger, a quarter (25%) also increased how often they drove, 14% decreased driving, and the majority (62%) did not change how often they drove.

Public transport

Between November/December compared with February/March, 8% of the longitudinal group increased their frequency of train travel while 4% decreased their use, and 78% did not change the frequency of train travel.

Young people and those within London were the most likely to have changed the frequency they used train services. Those aged 16-34 were the most likely to have increased the amount they used the train (13% versus 8% of adults overall) while they were also the most likely age group to have decreased train use as well (7% versus 4% overall). Similar changes were found for those living in London when compared to the national average; one in five Londoners (20%) increased their train use (compared with 8% nationally) while 9% decreased their train travel (compared with 4% nationally). Those who had not yet been invited to be vaccinated were more likely than average to have increased their train use (9%) compared to the national average (7%) although this may have reflected their age and greater likelihood to be in employment.

Overall, 15% increased their use of the bus between November/December and February/March while use decreased for 8%. As with train use, it was young people (aged 16-34) and those in London who were most likely to have changed how often they used buses. This increased for 19% of those aged 16-34 compared with 15% nationally while 10% decreased their bus use (8% nationally). Levels of bus use were similar among those who had received the vaccine and those who had not.

Changes in bus use were most significant in London and Scotland when compared to the national average. In London, a quarter (25%) increased their use (compared to 15% nationally) while it decreased for 17% (8% nationally), while in Scotland bus use increased among 22% and decreased for 6%.

Active travel

Among our longitudinal cohort, a similar proportion increased (8%) as reduced (6%) how often they cycled between November/December and February/March. A similar pattern was seen with walking; 28% increased how often they walked all the way to a destination, while 27% decreased this. Those in London were most likely to have increased their walking compared to the national average; two in five Londoners (38%) increased the frequency they walked all the way to a destination (compared to 28% nationally).

Men were more likely than women to have increased their cycling (11% versus 5%) while young people aged 16-34 were more likely to have decreased their cycling compared to the national average (9% versus 6%). Those in the North West of England were also most likely to have increased their cycling (13%) while those in social grade ABC1 were also more likely to have increased the frequency they cycled (9% versus 6% overall). There were no significant differences between vaccine recipients and those who had not had the vaccine.

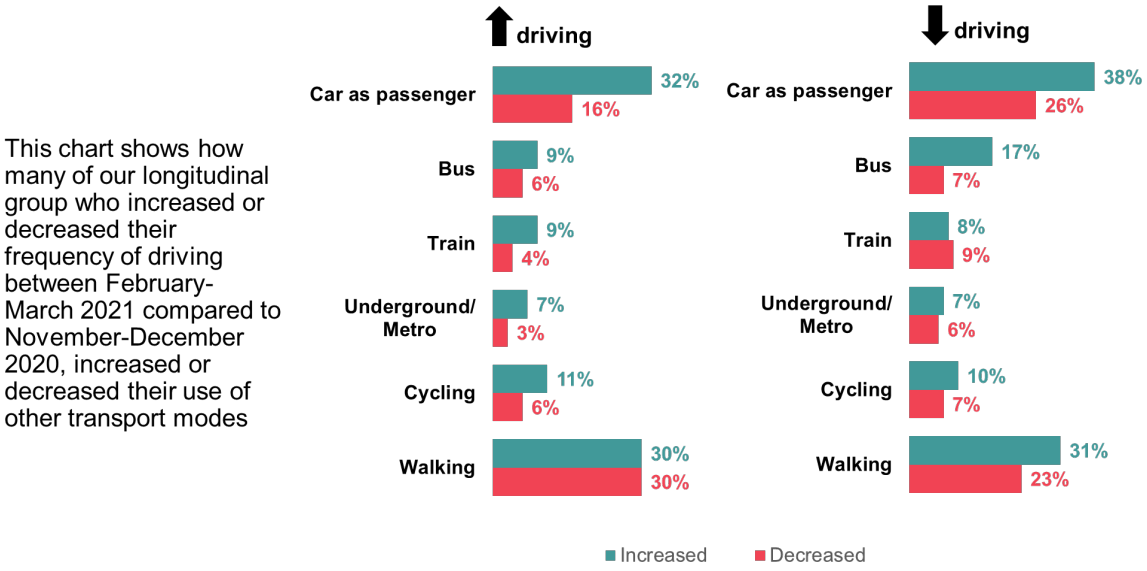
2.6. Was there 'mode switch'?

Longitudinal analysis from the previous waves of *All change?* and again in February/March 2021, found that if an individual increased their use of one mode of travel, they were likely to have increased their use of any other modes they used rather than switching between modes.

This is demonstrated in the example in Figure 8 which shows changes in travel between November/December 2020 and February/March 2021. People who increased how often they travelled as a car driver, were also more likely to have increased, rather than decreased, the frequency they used other transport modes during this period.

People who did *less* driving during this period were more likely to use the bus more frequently (17%) than those who did more driving (9%). While this is not definitive evidence of mode switch, it points to a potential association between driving less and using public transport more for a small group of our longitudinal cohort.

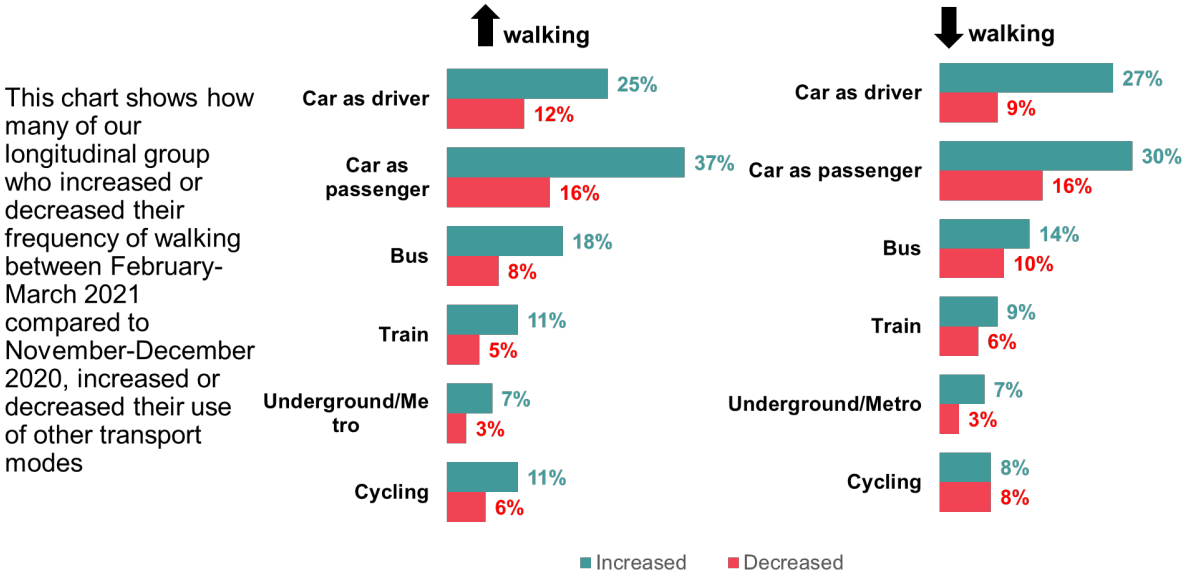
Figure 8: Mode increase/decrease among those who increased/decreased driving in car – February/March 2021 vs. November/December 2020



Source: Ipsos MORI/DfT 2,497 UK adults who participated in Wave 3 and Wave 4

Figure 9 below shows that people who had increased their walking all the way to a destination between November/December 2020 and February/March 2021, were also likely to have increased how often they used other modes of transport. People who had *decreased* their walking over this period were also more likely to have increased their car use (as driver, 27%, or passenger, 30%) than decrease car travel.

Figure 9: Mode increase/decrease among those who increased/decreased walking February/March 2021 vs. November/December 2020



Source: Ipsos MORI/DfT 2,497 UK adults who participated in Wave 3 and Wave 4

3. Why did behaviour change?

After having various restrictions re-introduced or put in place across the UK at the time of the wave 3 survey (covering November/December 2020), more stringent restrictions were introduced in January 2021. For example, schools were required to close as were non-essential shops such as clothing and electronic shops and hospitality venues, such as pubs and restaurants.

This section describes evidence on why and how people travelled during February/March, and then compares behaviours with the previous two lockdowns - the first in April/May 2020 and the second in November/December 2020 in England - as a way of exploring the impact of things we know are likely to have been important; especially the restrictions to travel and people's motivations to travel including seasonal factors, particularly the winter weather, and the roll-out of the Covid-19 vaccination programme.

3.1. Why did people travel?

During February/March 2021, 97% of UK adults travelled (for any reason) compared to 99% during November/December 2020. On average, respondents identified 2.2 reasons for travelling in February/March 2021, slightly down from 2.5 in November/December 2020. This average was higher among middle age groups (those aged 35-44) (2.30), those in work (2.30), and those living in Scotland (2.30) and Northern Ireland (2.60).

Figure 10 below presents the various reasons people travelled (by any mode) in the four weeks prior to taking part in the survey. In February/March, shopping was the most common reason people travelled with 72% saying they travelled for this reason, significantly higher than any other reason and at a similar level to the number saying they travelled for shopping in November/December (74%).

Shopping was followed by travelling to a medical, hospital or dentist appointment (30%), an increase of 7 percentage points since November/December and likely reflecting attendance at vaccination centres. Travelling to a place of work (26%), travelling for recreation (25%) and running errands for people were the three next most frequented types of journeys – each at a similar level to November/December. Thirteen percent said they travelled to visit friends/relatives, down from 19% in November/December.

Figure 10: Reasons people travelled in February/March 2021

Source: Ipsos MORI/DfT; Base: All users of any transport mode at least once in the past four weeks (3,299) among 3,388 UK adults (Wave 4), 23 Feb – 9 March

3.2. Which modes did people use?

Shopping

The most commonly used mode among those who travelled to go shopping was driving a car (used by 58%), followed by walking (35%), travelling as a car passenger (30%) and by bus (8%). These figures are similar to those for November/December 2020.

People who went shopping and travelled as a car driver were more likely to be middle aged or older; 62% of those aged 35-54 who went shopping, drove there, as did 69% of those aged 55-75, with a lower proportion (40%) of younger adults aged 16-34 driving for this reason. Young people were more likely to have travelled as a passenger in a car for shopping; done by 44%, compared to 25% of those aged 35-54 and 24% of older adults aged 55-75.

Those from an ethnic minority background were less likely to have driven by car to go shopping (45% compared to 60% of those from other backgrounds) and were more likely to have travelled by bus (13% against 7%).

Travelling to medical, hospital and dentist appointments

The proportion of people traveling to a medical, hospital or dentist appointment has increased since November/December 2020 which is likely to be related to the roll-out of the vaccination programme (from 23% to 30% in February/March 2021).

Driving a car was the most popular mode (51%) among those who travelled for medical, hospital and dentist appointments during February/March, followed by travelling as a car passenger (32%), walking (15%) and taking the bus (6%).

Of those that had been vaccinated (30% of our sample), nearly three in five (59%) drove a car to a medical appointment followed by 27% who travelled in a car as a passenger. Among all (who travelled for a medical appointment, a significantly higher proportion of older adults aged 55-75 (62%) drove by car for this reason, compared with 28% of younger adults aged 16-34.

Those aged 16-34 were more likely to have travelled as a car passenger; 47% compared with 28% of 35-54 year olds and 26% of 55-75 year olds.

People from ethnic minority backgrounds were more likely to have travelled by an app-based minicab service (10% compared to 2% of adults overall). However, there was no statistically significant differences in car and bus travel between those from an ethnic minority background and those from other backgrounds.

Commuting

Around a quarter of UK adults (26%) said they travelled to a place of work in February/March 2021. Most of those who travelled to their place of work drove by car (66%), 15% travelled as a car passenger and the same proportion walked, while 12% travelled by bus to work, 6% travelled by train and 3% cycled.

Older commuters - those aged 55-75 - were more likely than average to have driven a car to work with three-quarters (76%) having done so compared with 59% of 16-34 year olds.

Commuters from ethnic minority backgrounds were less likely to have driven compared to those from other backgrounds (50% versus 69%) and were more likely to have commuted by bus (21% versus 11%) and underground/metro (12% against 3%).

Recreation and keep-fit

A majority (62%) of those who travelled for recreation and keep-fit purposes did so on foot, an increase from 55% in November/December 2021. Such journeys included walking for recreation/keeping fit or going to a gym or venue to play sport. This was followed by driving a car (33%), travelling as a car passenger (23%) and cycling (12%).

There was little variation among groups in terms of walking for recreational reasons or to go to a gym/somewhere to play sport, however younger people (those aged 16-34) were more likely to have walked for this purpose than the oldest age group (67% compared to 56%).

Older people were much more likely to have driven for this purpose with 40% having done so compared with a quarter (25%) of younger people aged 16-34. The 16-34-year old age group were more likely to have travelled as a car passenger (35% compared to 23% overall). People in Scotland were more likely than any other nation in the UK to have driven for recreational reasons; 46% compared with 33% across the UK.

While those from an ethnic minority background were less likely to have driven a car for recreation and keep-fit purposes than those from other backgrounds (15% compared to 35%), they were more likely to have used the bus (9% vs. 3%).

3.3. Comparing lockdowns

The four previous waves of *All change?* surveys have taken place against different UK-wide national lockdown restrictions. England, however, was in ‘full’ lockdown during fieldwork and survey reference periods for wave 1 (April/May 2020), wave 3 (November/December 2020) and wave 4 (February/March 2021). Although there were some important differences between the

lockdowns, we can compare behaviours and investigate the possible impact of seasonal factors.

Compared to the first lockdown period of April/May 2020, people in England travelled a similar degree by most transport modes during February/March 2021. An exception to this was travelling as a car passenger where 54% in England did this in February/March 2021, compared with 43% in April/May 2020. Travel as a car passenger in February/March 2021 was at a similar level to the second lockdown in England, in November/December 2020, when 56% said they travelled as a car passenger.

There were small increases in use of some public transport modes in November/December 2020 relative to the first lockdown period, followed by small reductions in February/March 2021. For example, bus use increased from 19% to 24% between the first and second lockdowns in England however this fell back to 19% in February/March 2021. The incidence of walking all the way to a destination remained more consistent during each of the three lockdowns in England. In contrast, wave four (February/March 2021) recorded the lowest proportion of people cycling; 15% compared with 21% in April/May 2020 and 17% in November/December 2020, and a likely reflection of the colder winter months.

The proportion driving to go shopping also remained consistent over the three lockdown periods, and driving to commute to work in February/March 2021 was in line with November/December 2020 (20% and 22%respectively). Incidence of commuting? was significantly higher however in second and third lockdowns than during the first lockdown in April/May 2020 when it was 13%. The incidence of driving to visit friends and relatives decreased in February/March 2021 such that it was lower than in November/December 2020 (7% compared to 11%) but higher than during the first lockdown (when it was 3%).

The proportion of people who said that they would feel uncomfortable travelling by bus or train changed little between November/December 2020 and February/March 2021 with both much lower than levels recorded at wave 1 (April/May 2020). For example, nearly three in five (58%) said they would be uncomfortable taking the bus in both February/March 2021 and November/December 2020 compared to 74% in April/May 2020.

Table 7: Overview comparison of travel behaviour during lockdowns in England

	April-May 2020	November-December 2020	February-March 2021
% travelled in a car as a driver past 4 weeks	63	65	62
% travelled in a car as a passenger past 4 weeks	43	56	54
% used bus past 4 weeks	19	24	19
% used train past 4 weeks	12	14	10
% walked to destination past 4 weeks	66	64	65
% cycled past 4 weeks	21	17	15
% used taxi past 4 weeks	12	11	10
% drove to go shopping[2]	47	48	47
% drove to commute	13	22	20
% drove to visit friends/relatives	3	11	7
% uncomfortable using bus next 4 weeks	74	58	58
% uncomfortable using train next 4 weeks	73	55	56

Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1)

[2] Asked as 'Shopping for food' at W1 (data shown here) with 'Shopping 'non-food' asked separately at W1; these were combined at W3

4. What were likely behaviours in the next 4 weeks?

All waves throughout *All change?* have included questions asking respondents to anticipate their use of different modes of transport in the subsequent four weeks. This means that it is important to consider the reference period for both the *All change?* wave 3 (November/ December 2020) and wave 4 (February/March 2021) surveys given our comparison between the two throughout this report and in this section in particular.

Wave 3 took place just prior to the Christmas holidays, meaning that the four weeks following the survey would have included December and the Christmas period. Importantly, fieldwork was conducted before the discovery of new Coronavirus strains and the introduction of Tier 4 restrictions across parts of England, and before the withdrawal of the 'Christmas bubble' policy.

The wave 4 survey took place during the third lockdown in England (which came into effect on 6 January), with Wales, Scotland and Northern Ireland also using lockdown restrictions, and shortly after the Government's Roadmap for England was announced (on 22 February). The Roadmap identified four steps with step one due to fall *within* the forthcoming four-week period (step 2 was not scheduled to start until 12 April at the earliest, after the four-week period). Step 1 included the return of all children and students to face-to-face education in schools and colleges (8 March), allowing some outdoor social contact for recreation and exercise outdoors (8 March), 'rule of six' gatherings outdoors (29 March), the opening of outdoor sports facilities (29 March) and an end to the 'stay at home' rule (also 29 March).

The successful roll-out of the Covid-19 vaccination programme was another notable difference between fieldwork periods. At the start of fieldwork for the wave 4 survey (23 February), 17.9 million people across the UK had received their first dose vaccinations as part of Phase 1 (targeting the nine priority groups) and, at its completion (9 March), 22.8 million had received their first dose.[3] The wave 4 survey contained several new questions about the vaccination programme, its phases and their perceived impact on confidence travelling by public transport, covered in the sections which follow.

[3] Source: Government data on people who have received first dose vaccinations, by report date: https://coronavirus.data.gov.uk/details/vaccinations

4.1. Propensity to travel during next four weeks

As in November/December 2020, there was some expectation of increased travel in the next four weeks during February/March 2021 including more frequent use of public transport. As shown in Table 8 below the most pronounced expected shift was for bus and train use; while 19% of people travelled by bus during February-March 2021 and 10% by train, levels of expected use over the four week-period following the survey was six points higher, at 25% and 17% respectively.

Table 8: Proportion of people that travelled by each mode in past four weeks compared with proportion that expected to travel in the next four weeks – February-March 2021

	Past 4 weeks	Next 4 weeks	± Difference
Walking	63	66	+3
Car driver	63	62	-1
Car passenger	54	57	+3
Bus	19	25	+6
Cycling	15	20	+5
Train	10	17	+7
Taxi	10	11	+1
Underground	6	11	+5

Source: Ipsos MORI/DfT, 3,388 UK adults (Wave 4), 23 Feb – 9 March 2021
Q1./Q1a. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport?
Q12. Please now think about what you will be likely to do in the weeks ahead as some restrictions are eased. How often, if at all, do you think you will be to travel using these modes in the next 4 weeks or so? It does not matter how long you think the journeys would be, or why you will make them.

Table 9 below shows expected bus and train travel for different groups. Expected use of buses and trains to travel was significantly higher among people who used the mode during the previous four weeks compared to the average. Levels of expected use were also higher than average among people who had used buses or trains pre-pandemic, with higher levels of expected use also among those from ethnic minority backgrounds, those without access to a car or bicycle and among people who had used these modes once a week or more pre-pandemic (57% of this group expected to use buses and 52% expected to use trains). Levels were also higher for people who would feel comfortable travelling that way (48% bus, 33% train), and among those living in London (51%, 37%).

Table 9: % expected to travel by bus/train - next four weeks – February-March 2021

Group	Bus	Train
All adults	25	17
16-34 year olds	30	25
Used pre-Covid (any frequency)	36	21
Ethnic minority background	39	31
Comfortable travelling by mode next 4 weeks	48	33
No access to car/bicycle	49	24
London	51	37
Used mode pre-Covid once a week/ more often	57	52
Used mode in past 4 weeks	79	77

Source: Ipsos MORI/DfT, 3,388 UK adults (Wave 4), 23 Feb – 9 March 2021

4.2. Propensity to travel – key factors

As was the case in November/December 2020, shopping was the most common reason for travel during February/March 2021. Seven in ten (72%) of those who travelled at all during the previous four weeks, travelled for shopping (equivalent to 71% of all adults).

There was an increase in travel to medical appointments – from 23% of those who travelled during November/December 2020 to 30% in February/March 2021 – likely reflecting the commencement of the vaccination programme in January. Travelling to a place of work (26%), travelling for recreation (25%) and running errands for people were the three next most frequent types of journeys – each at a similar level to November/December. Among those making journeys, the proportion of people travelling to visit friends/relatives fell compared to November/December 2020 (from 19% to 13%), as did those making school journeys (from 11% to 6%) and travelling to access services (from 11% to 5%).

Levels of working from home influenced commuting patterns and 83% of those who had worked at home all of the time in the past 4 weeks expected to do the same in the next four weeks. Among all UK adults (including those outside employment), 29% reported working at home all of the time in the proceeding four weeks while less than half this proportion did so some of the time (13%). The incidence of working exclusively from home was higher in England (30%)

compared to Wales (19%) and Scotland (25%). In England, working from home exclusively was highest in London (40%) and lowest in the West Midlands (23%).

Working exclusively from home during February/March 2021 was also more common among higher income groups across the UK (42% among households with an income exceeding £40,000) and among those who, before the pandemic, had travelled by train once a week or more often (40%), those who had used underground/metro services this often (45%), those who cycled (36%) once a week or more pre-pandemic. In contrast, 28% of those who drove a car once a week or more before the pandemic worked from home exclusively in February/March.

Table 10 shows levels of working from home in the past for weeks together with expected levels of working from home in the next four weeks., A quarter of UK adults (25%) expected to work at home all of the time in the next four weeks (compared to 29% in the previous four weeks), and 15% expected to work from home some of the time, an increase of two points. There was also a little more uncertainty about the future period - don't know responses increased by two points.

While this suggests relatively little change at the aggregate level, when asked directly, 9% of UK adults said they expected to travel to a place of work in the next four weeks more often 'compared to now'. Anticipated levels of commuting are higher among the 16-24 year old age group (21%) but also among those who had become unemployed (24%), worked reduced hours (15%) or been furloughed during the pandemic (16%), and those who had travelled by bus, train and underground/metro in the past four weeks (12%, 18% and 19% respectively).

Table 10: Working at home – past four weeks/next four weeks – February-March 2021

	% past 4 weeks	% next 4 weeks	± Change
All of the time	29	25	-4
Some of the time	13	15	+2
Didn't/won't be working/none	57	56	-1
Don't know	1	3	+2

Source: Ipsos MORI/DfT, 3,388 UK adults (Wave 4), 23 Feb – 9 March 2021

New ways of shopping developed during the first UK lockdown have continued. During April/May 2020, 59% said they shopped online more than they had done before the pandemic, 29% used home delivery more, and 60% shopped closer to home. During February/March 2021, 6% of people said that they expected to shop closer to home *less often* in the next four weeks compared to 'now', 8% expected to shop online less, and 12% expected to use a home delivery for supermarket less. In the case of shopping closer to home and online shopping, higher proportions of people expected to do this more often.

5. What are levels of confidence in travelling?

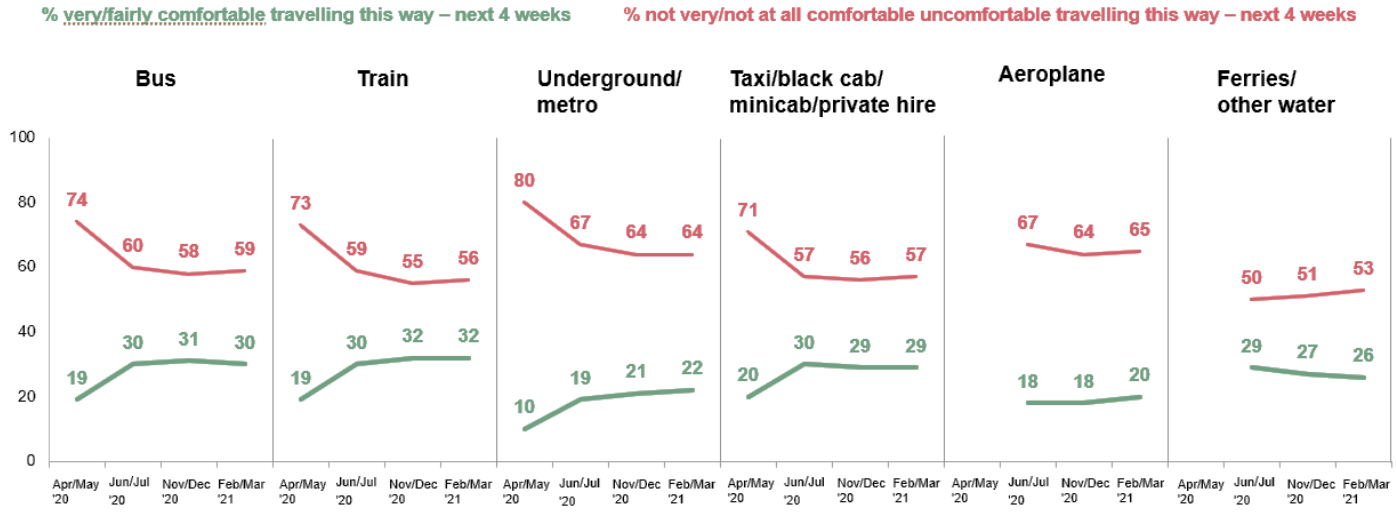
The February/March 2021 survey (wave 4) repeated previous questions about the UK public's levels of comfort in travelling by several public transport modes. Respondents were asked whether they would be comfortable using each mode in the next four weeks regardless of "whether you think you actually will travel this way, or how often you have travelled this way in the past".

5.1. Comfort in using public and shared transport

Following an increase in levels of comfort travelling by public transport over the summer months during 2020 - these improved from 19% in April/May 2020 to 30% in June/July 2020 for both bus and train, and from 10% to 19% for underground/metro - they were similar in February/March 2021 as they were in November/December 2020 (shown in Figure 11). During the same period, levels of discomfort fell and then stabilised.

There was little change between November/December 2020 and February/March 2021; levels of comfort increased a little, between 1-2 percentage points, although fell back a similarly small degree for travelling by bus and ferries/other water transport. Ferries and other water transport is the only mode for which we have seen a continuously declining trend in levels of comfort since summer 2020.

Figure 11: Trends - comfort levels for using public transport in the next 4 weeks



Source: Ipsos MORI/DfT, Base: 3,388 UK adults, 23 Feb – 9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1)
Q14. Thinking about the next 4 weeks or so, how comfortable, if at all, do you think you would feel choosing to travel by the following modes of transport? It does not matter whether you think you actually will travel this way, or how often you have travelled this way in the past, it's your impressions we are interested in.

Overall, men were more likely than women to have said they would feel very or fairly comfortable travelling on public transport in the next 4 weeks. For example, a third (33%) of men said they would feel comfortable travelling by bus in the next four weeks compared with 28% of women. Levels of comfort were similar among ABC1 and C2DE households (32% and 28%), and among those working and not working (30% and 31%), while those from ethnic

minority backgrounds were much less likely than average to have said they would be not very or not at all comfortable (48% compared to 59%).

Those living in Greater London (45%), in urban areas (33%), as well as those from lower income households (38%) and those with no access to a car or bicycle (46%) were more comfortable using a bus relative to the UK average (30%), reflecting the availability of, and higher reliance on, public transport. Over half (59%) of those who used any public transport modes, and 63% of those who said they travelled by bus in the last four weeks, said they would be comfortable travelling by bus in the next four weeks.

5.2. Compliance and experiences of travelling during February/March 2021

As we found in November/December 2020, the public/passengers wearing face masks/face coverings (32%), and passengers and staff following social distancing rules while travelling[4] (27%) remain the two most encouraging measures when considering making a journey by public transport in the next four weeks. The third most encouraging measure was ensuring 'better/deeper cleaning of carriages, buses, etc.', chosen by 17%. Almost a third (31%) said that none of these measures encouraged them to use public transport or that they would not travel by public transport at all.

Levels of reported personal compliance with wearing face masks/coverings among those who travelled by public transport in the previous 4 weeks were high in February/March 2021 – the majority of public transport users said they wore a face mask/covering when using the bus (93%), the train (91%) and the underground/metro (90%). The equivalent figures for November/December were 91%, 92% and 89% respectively.

Levels of non-compliance were in line with those in November/December 2020 for underground/metro, train and bus (shown in Figure 12).

Figure 12: Levels of reported personal compliance with wearing face masks/coverings on public transport

Source: Ipsos MORI/DfT; Base: Wave 4: All using mode at least once in past 4 weeks 535 (bus), 267 (train), 171 (underground), 23 Feb – 9 March 2021; Wave 3: All using mode at least once in past 4 weeks 656 (bus), 366 (train), 232 (underground), 27 Nov-7 Dec 2020

[4] This was defined in the survey as 'staying a set distance apart, including at bus stops, on platforms, and in stations'

The two most commonly cited reasons for not wearing a face mask/covering when travelling by underground/metro and bus were:

- There were no other people near me (other than those from my own household) – 22% (bus) and 24% (underground/metro)
- I don't think the requirement to wear them is being enforced – 19% (bus) and 20% (underground/metro)

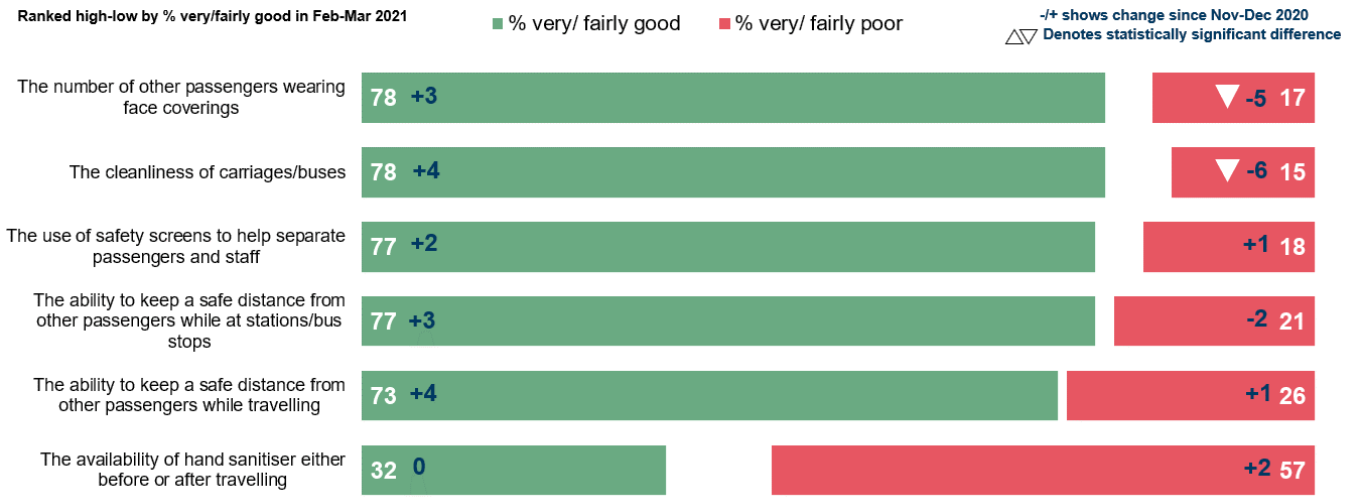
The two most commonly chosen reasons for not wearing a face mask/covering when travelling by train were:

- I don't think I'm at risk from coronavirus – 35%
- Nobody else on public transport was wearing one – 13%

As seen in November/December 2020 (Figures 13-15 below), the majority of those using each public transport mode were positive about Covid-19 safety measures based on their experience of travelling during February/March 2021. The only exception to this was the availability of hand sanitiser either before or after travelling by bus.

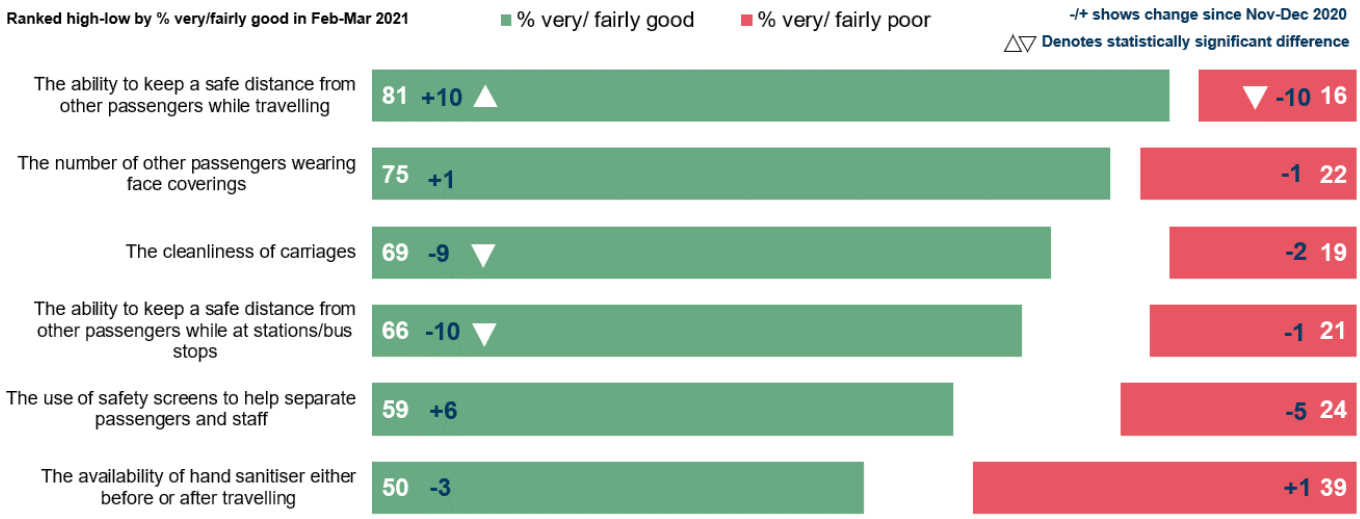
While generally positive, train and underground/metro users rated the ability to keep a safe distance from other passengers higher in February/March 2021 compared with November/December 2020 - 81% vs 71% for train and 68% vs 58% for underground/metro), perhaps reflecting low levels of passengers travelling during this period. The charts show the change since November-December 2020 with statistically significant changes highlighted.

Figure 13: Ratings of Covid-related safety measures among bus users



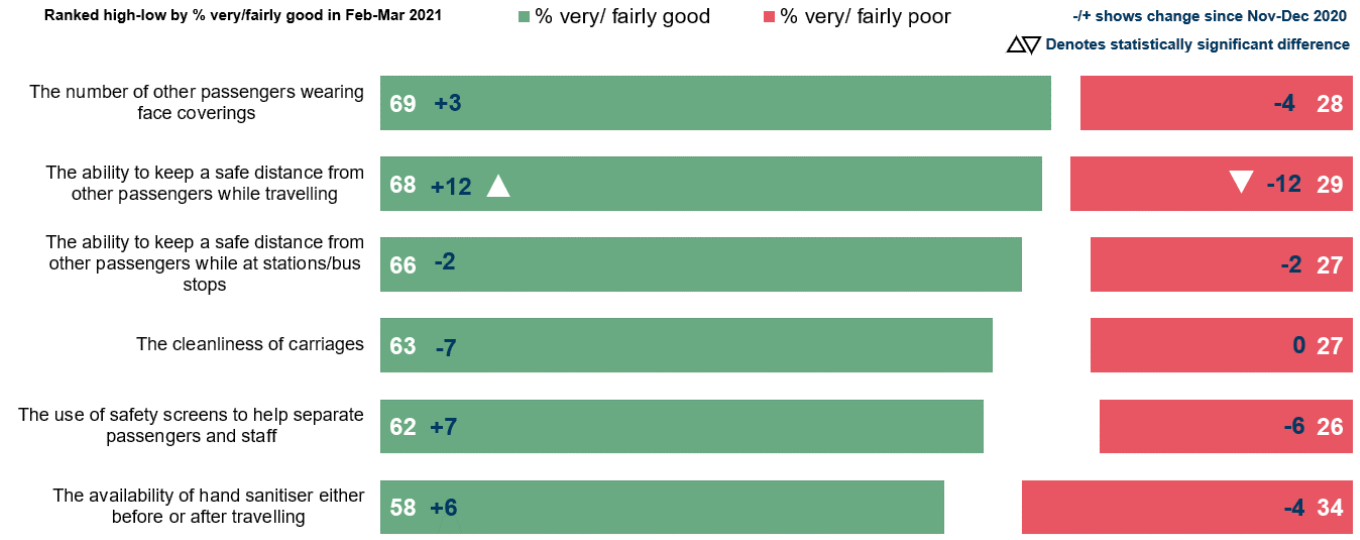
Source: Ipsos MORI/DfT; Base: All using a bus at least once in past 4 weeks (535) among 3,388 adults, 23 Feb – 9 March 2021 (656 in Nov-Dec 2020)

Figure 14: Ratings of Covid-related safety measures among train users



(Source: Ipsos MORI/DfT; Base: All using a train at least once in past 4 weeks (267) among 3,388 adults, 23 Feb – 9 March 2021 (366 in Nov-Dec 2020)

Figure 15: Ratings of Covid-related safety measures among underground/ metro users



(Source: Ipsos MORI/DfT; Base: All using underground/metro at least once in past 4 weeks (171) among 3,388 adults, 23 Feb – 9 March 2021 (366 in Nov-Dec 2020)

5.3. Confidence in travelling by public transport – vaccination roll-out

New questions were designed to understand whether the prospect of vaccination increases levels of comfort in using public transport, and the impact it makes on these among specific groups including frequent users of public transport before the pandemic. Respondents were asked whether they would be comfortable choosing to travel by some form of public transport - by bus, train, tram or underground/metro services - at five different points in the vaccination programme:

(1) Phase 1 of the vaccination programme had been completed – i.e. all of the priority groups had been offered their first dose of the vaccine

(2) If you had personally received your first dose of the vaccine

(3) If all adults in your household or support bubble had been offered their first dose of the vaccine

(4) If all adults in the UK had been offered their first dose of the vaccine

(5) If all adults in the UK had been offered their first and second dose of the vaccine

At the completion of survey fieldwork (9 March), 22.8 million UK adults had received their first dose of vaccination. Among our sample which was confined to 16-75 year olds (but will have also included care home, frontline health and social care workers as well as clinically extremely vulnerable individuals), 38% reported having received an invitation to be vaccinated and 79% of this group had received the vaccination at the point they completed the survey, equating to 30% of our sample. Some will have been invited and/or received first or second dose vaccinations subsequent to completing the survey.

The results in Table 11 show the potentially significant and positive impact that vaccination roll-out could have on people's willingness to use public transport. The findings indicate that the proportion saying they would be very or fairly comfortable travelling by public transport increase as the vaccination programme rolls out, compared to a baseline derived from averaging comfort levels of travelling by bus, by train and by underground/metro in the next four weeks (these questions were asked about specific modes rather than public transport generically).

As shown in Table 12 below, the baseline among all adults is 28% who are very or fairly comfortable travelling by public transport in the next four weeks, and there was an improvement of 20 percentage points to 48% at the completion of Phase 1 of the programme. This increased to a majority, 65%, if all adults in the UK had been offered their first dose (this is a little higher than the 60-61% for vaccination of the respondent/other household members) and 75% when second dose vaccinations have been offered.

Table 11: Comfort at travelling by public transport "if the following had happened before you wanted to make a journey"

	% very/fairly comfortable	% not very/not at all comfortable	± Change % very/fairly comfortable
Baseline* – next four weeks	28	60	n/a
(1) Phase 1 of the vaccination programme had been completed – i.e. all of the priority groups had been offered their first dose of the vaccine	48	40	+20
(2) If you had personally received your first dose of the vaccine	61	28	+33
(3) If all adults in your household or support bubble had been offered their first dose of the vaccine	60	28	+32
(4) If all adults in the UK had been offered their first dose of the vaccine	65	24	+37
(5) If all adults in the UK had been offered their first and second dose of the vaccine	75	15	+47

Source: Ipsos MORI/DfT, 3,388 UK adults (Wave 4), 23 Feb – 9 March 2021

* Baseline derived from averaging % very/fairly comfortable travelling by bus, by train and by underground/metro in the next four weeks

There were similar shifts in opinion among different demographic and geographic groups. Older age groups (those aged 55-75) were less comfortable than younger people (aged 16-24) about travelling by public transport at the of end of Phase 1 (45% compared to 55%). However, those aged 55-75 had lower levels of 'baseline' comfort - (28%) than those aged 16-24 (33%).

Table 12 presents changes in the proportion that would feel comfortable using public transport among different groups. It shows that improvements in levels of comfort across the main phases of the vaccination programme are similar for each of these groups. More frequent users of public transport before the pandemic and those who had used public transport in the past four weeks were more positive at the outset. However, at the point that all adults have been offered their first and second dose of the vaccine, comfort levels are very high across all groups, ranging from 75% of all adults to 82% of those that have used public transport in the last four weeks.

Table 12: Proportion that would feel very/fairly comfortable travelling by public transport "if the following had happened before you wanted to make a journey" – selected groups

	Baseline – next four weeks	Phase 1 (1)	All adults offered first dose (4)	All adults offered first/second dose (5)
All adults	28	48	65	75
'Lapsed' public transport users (used pre-pandemic but not February/March 2021)	22	42	64	78
Invited and had vaccine	31	51	66	77
Public transport users pre-pandemic (any frequency)	32	50	68	79
Public transport frequent users pre-pandemic (once week/more often)	38	54	69	79
Used public transport – past four weeks	52	71	80	82

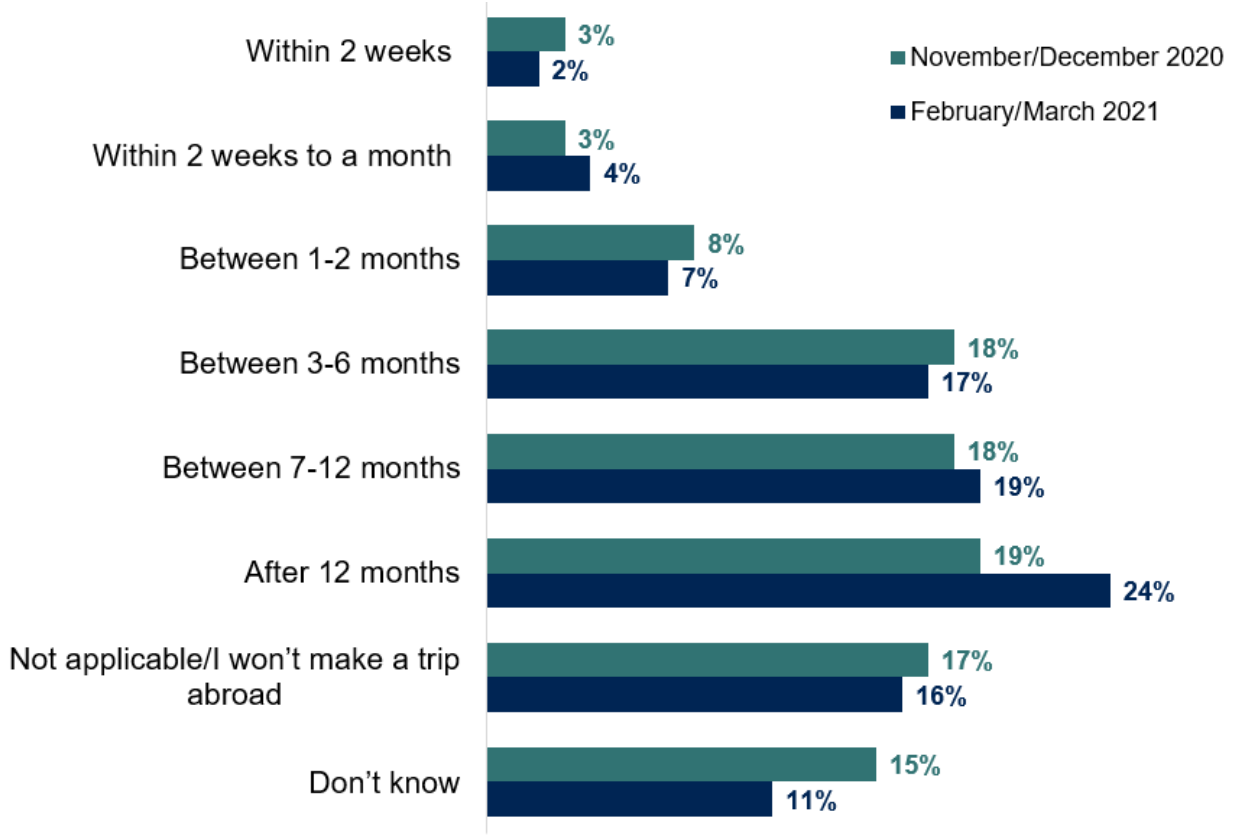
Source: Ipsos MORI/DfT, 3,388 UK adults (Wave 4), 23 Feb – 9 March 2021; Base sizes: 1,168 invited/had vaccine; 1,643 public transport users pre-pandemic (any frequency); 723 frequent users of public transport pre-pandemic (once week/more often); 1,261 'lapsed' public transport users; 639 used public transport – past four weeks

6. What are people's longer-term travel plans?

The proportion of people who expected to travel abroad within 12 months of restrictions being lifted was very similar in February/March 2021 compared to November/December 2020 - 50% and 49% respectively. There has been a significant increase in the proportion of people who said they would wait until a year has passed before travelling abroad; this was 24% in February/March 2021 compared with 19% in November/December 2020.

Older adults were more likely to expect to travel abroad after 12 months; 27% compared with 21% of those aged 16-34 years old. By contrast, younger adults were more likely to expect to travel abroad between 1-2 months of the lifting of travel restrictions; 11% compared with 6% of those aged 35-54 and just 4% of older adults.

Figure 16: Expectation of waiting period before travelling abroad after the lifting of travel restrictions

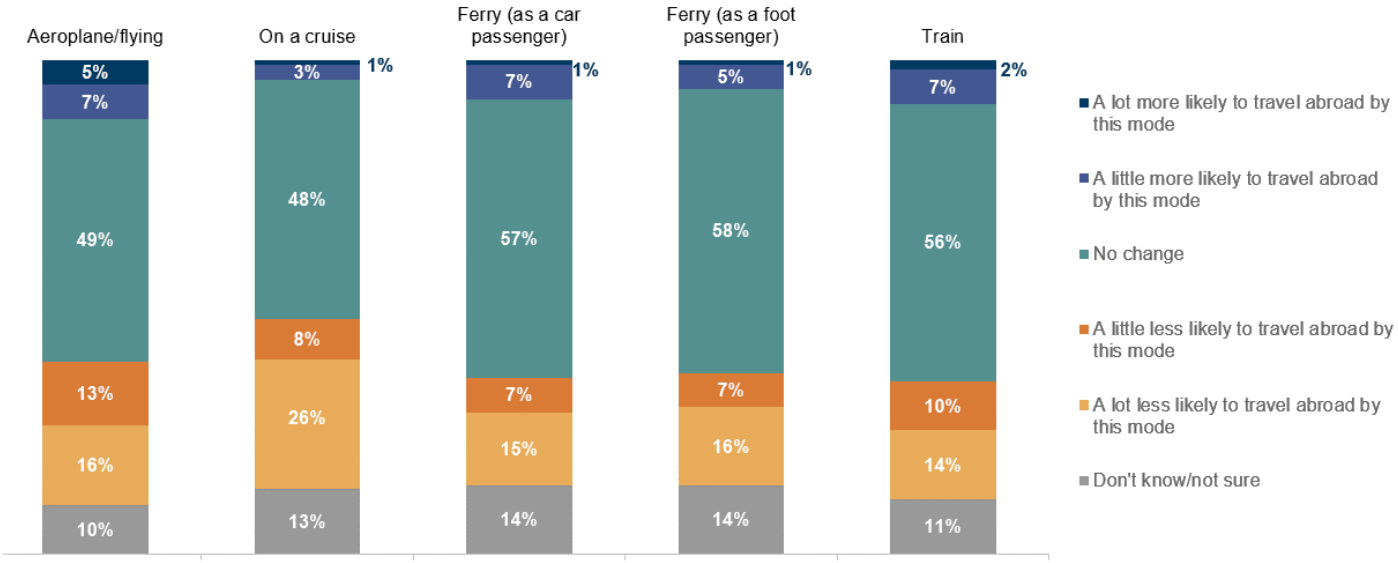


Source: Ipsos MORI/DfT; Base: 3,388 UK adults (Wave 4) 23 Feb – 9 March; 3,178 UK adults (Wave 3) 27 Nov-7 Dec

Almost one in five said they would go on a trip abroad between the next 3-6 months (17%) and between 7-12 months (19%) following the lifting of travel restrictions. Those in employment were more likely to expect to go on a trip or holiday abroad between 1-2 months (8%), 3-6 months (18%) and 7-12 months (20%) after the lifting of travel restrictions, compared with the UK average (7%, 17% and 19% respectively). Similarly, those from higher-income households (earning over £40,000/year) were more likely to expect to travel abroad within 2 weeks (5%), between 1-2 months (10%) and between 3-6 months (24%) of travel restrictions being lifted, relative to the UK average (2%, 7% and 17% respectively).

Thinking about a time when restrictions had been lifted and international travel resumed, around a half or more said in February/March 2021 that they did not expect a change in their likelihood of travelling abroad by each mode shown in Figure 17. However, a quarter, 26%, thought that they were a lot less likely to travel abroad by cruise.

Figure 17: Likelihood to travel abroad using mass-transit modes once restrictions are lifted than they did previously because of coronavirus.



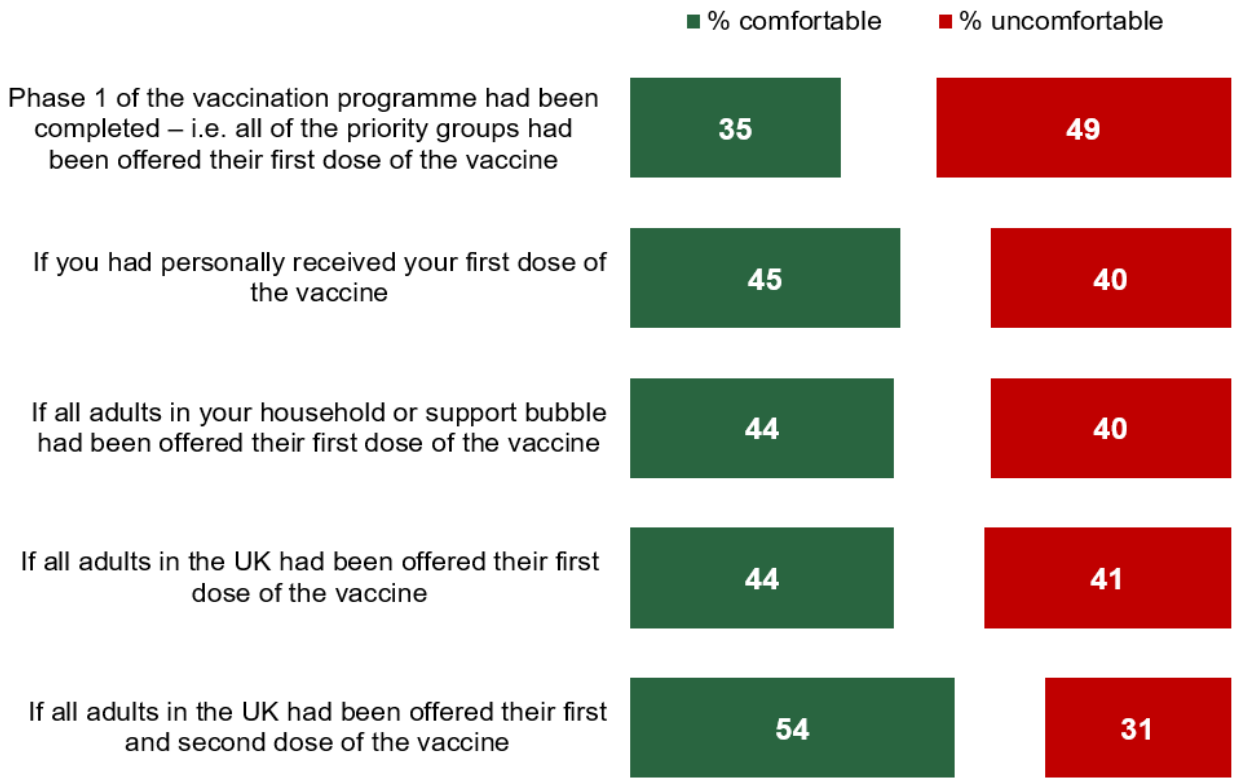
Source: Ipsos MORI/DfT; Base: 3,388 UK adults (Wave 4) 23 Feb – 9 March

Younger people were more likely to travel by all the modes in Figure 14 compared with older age groups – for example, 16% of those aged 16-34 years old said they were more likely to travel by aeroplane once restrictions are lifted than they did previously because of coronavirus, compared with 10% of those aged 55-75. The respective figures for going on a cruise were 7% and 4%. In addition, those from ethnic minority backgrounds were more likely than average to have said that they would be more likely to travel by aeroplane because of coronavirus – 23% compared to 12% (although 31% said they were les likely to do so).

As with future use of public transport, although to a lesser extent, the vaccination programme boosts potential confidence levels in travelling abroad, as shown in Figure 18. For example, 54% said they would feel comfortable travelling overseas when all adults have been offered their second dose (lower than 75% in the case of public transport). Just over a third (35%) said they would feel comfortable travelling abroad when Phase 1 of the vaccination programme had been completed, while almost half (49%) remained uncomfortable at this stage.

Requiring all those travelling overseas to have a Coronavirus vaccine provided further reassurance for 40% of the UK public who said this would make them a lot or a little more likely to travel abroad. While 13% said it would make them a little or a lot less likely to travel abroad, 34% said it would make no difference.

Figure 18: Levels of comfort for travelling abroad at different stages of the vaccination programme



Source: Ipsos MORI/DfT; Base: 3,388 UK adults (Wave 4) 23 Feb – 9 March

Wave 4 – Appendices

Appendix A – Sample profile

Table A.1: Wave four sample size, unweighted and weighted %s for selected population groups

Population group	Sample size (unweighted)	Unweighted %	Weighted %
UK adults aged 16-75	3,388	100	100
England	1,906	56	84
Scotland	746	22	8
Wales	536	16	5
Northern Ireland	200	6	3
Urban	2,399	80*	83*
Rural	609	20*	17*
Male	1,528	45	49
Female	1,844	54	50
16-24	372	11	16
25-34	437	13	17
35-44	615	18	17
45-54	638	19	18
55-75	1,326	39	31
Working full-time/part-time	2,056	61	63
Not working	1,332	39	37

Population group	Sample size (unweighted)	Unweighted %	Weighted %
Ethnic minority groups	356	11	13
Up to £16,106 ('lower')	470	19*	23*
£16,106-£39,999 ('medium')	1,087	45*	45*
£40,000+ ('higher')	872	36*	33*
Long-standing mental or physical health condition or illness	1,086	39*	36*

Source: Ipsos MORI/DfT, 3,388 UK adults (Wave 4), 23 Feb – 9 March 2021
Where percentages do not sum to 100, this may be due to computer rounding *indicates percentages of all those answering/data available

Appendix B – Statistical reliability

It is important to note that, strictly speaking, confidence intervals relate only to samples that have been selected using strict probability sampling methods but, in practice, it is reasonable to assume that these calculations provide a good indication of the confidence intervals relating to this survey given the approach used.

Table B.1 shows that we can expect an overall sampling tolerance (this refers to the upper and lower limit of error) of up to +/- 1.7 percentage points at the '95% confidence interval' for a 50% finding the survey overall.

Table B.1: Survey sampling tolerances: overall level

Size of sample on which survey result is based and approximate sampling tolerances applicable to percentages at or near these levels.

	10% or 90%	30% or 70%	50%
1,000	1.9	2.8	3.1
2,000	1.3	2.0	2.2
3,388	1.0	1.6	1.7

For example, with a sample size of 3,388 where 30% say that they have travelled by car, then the chances are 19 in 20 that the 'true' value (i.e. the one which would have been obtained if the whole population of UK adults had been interviewed) will fall within the range of +1.6 percentage points from the survey result (i.e. between 28.4% and 31.6%).

The following table indicates the sampling tolerances when comparing different sub-samples of respondents. If we once again assume a ‘95% confidence interval’, the differences between the results of two separate groups must be greater than the values given in the following table in order to be deemed ‘statistically significant’:

Table B.2: Survey sampling tolerances: sub-group level (rounded)

Sample sizes and differences required for significance at or near these percentage levels.

	10% or 90%	**30% or 70%**	**50%**
1,906 vs. 746 (England vs. Scotland)	3	4	5
2,399 vs. 609 (urban vs rural)	3	5	5

For example, if 30% of people in urban areas give a particular answer compared with 35% of those in rural areas (assuming sample sizes in the table above), then the chances are 19 in 20 that this five-point difference is statistically significant.

Ipsos MORI's standards and accreditations

Ipsos MORI's standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.

ISO 20252

This is the international market research specific standard that supersedes BS 7911/MRQSA and incorporates IQCS (Interviewer Quality Control Scheme). It covers the five stages of a Market Research project. Ipsos MORI was the first company in the world to gain this accreditation.

ISO 27001

This is the international standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos MORI was the first research company in the UK to be awarded this in August 2008.

ISO 9001

This is the international general company standard with a focus on continual improvement through quality management systems. In 1994, we became one of the early adopters of the ISO 9001 business standard.

Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos MORI endorses and supports the core MRS brand values of professionalism, research excellence and business effectiveness, and commits to comply with the MRS Code of Conduct throughout the organisation.

Data Protection Act 2018

Ipsos MORI is required to comply with the Data Protection Act 2018. It covers the processing of personal data and the protection of privacy.

For more information

Ben Marshall, Research Director, Ipsos MORI
Ben.Marshall@ipsos.com

Glenn Gottfried, Research Manager, Ipsos MORI
Glenn.Gottfried@ipsos.com

Lore Bizgan, Senior Research Executive, Ipsos MORI
Lore.Bizgan@ipsos.com

3 Thomas More Square
London
E1W 1YW

t: +44 (0)20 3059 5000

www.ipsos-mori.com
http://twitter.com/IpsosMORI

About Ipsos MORI Public Affairs

Ipsos MORI Public Affairs works closely with national governments, local public services and the not-for-profit sector. Its c.200 research staff focus on public service and policy issues. Each has expertise in a particular part of the public sector, ensuring we have a detailed understanding of specific sectors and policy challenges. Combined with our methods and communications expertise, this helps ensure that our research makes a difference for decision makers and communities.

Ipsos MORI