November 2021

All Change?

longitudinal travel tracker

Wave 6

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Ipsos MORI

Contents

Executive summary

Ipsos MORI conducted a UK-wide online survey of the public during November 2021 on behalf of the Department for Transport as part of the *All change?* research programme. The survey was the sixth and final in a series, designed in response to the COVID-19 pandemic to measure and explore the reasons for current and intended changes in behaviour.

The first *All change?* survey took place during the full, UK-wide national lockdown period while wave 2 came after the easing of restrictions. Wave 3 was conducted over a four-week period during which tighter restrictions were in place, while wave 4 took place during another period of lockdown. Fieldwork for the penultimate survey, wave 5, started on 17th May 2021 after Step 3 of the Roadmap for easing lockdown restrictions in England had come into effect, and restrictions were also being eased during this period in Scotland, Wales and Northern Ireland.

Fieldwork for the sixth wave started on 4th November 2021, several months after the UK Government removed all legal limits on social contact in England on 19th July and restrictions had also been lifted in other nations within the UK, although some variation remained. At the point that wave 6 fieldwork was completed, 68% of the population had received a second dose of the COVID-19 vaccine. Concerns about a new variant of COVID-19 (subsequently called Omicron), were covered in the media on 25th November shortly before the end of fieldwork for wave 6 finished on 29th November.

The surveys were supplemented with two phases of qualitative research. The first phase took place in autumn 2020 and the second was conducted between 8th November and 3rd December 2021. The most recent qualitative research involved 10 online focus group discussions which brought together different types of transport users to share and discuss their experiences of travelling during the pandemic, and 15 in-depth interviews which explored how a range of people in England made decisions about travelling.

The *All change?* programme was designed to meet four objectives, covered below:

1. To track changes in travel behaviour in response to COVID-19 and to understand whether changes are maintained in the medium to longer-term

Overall, as most restrictions were lifted, people travelled more during November 2021 compared to May/June 2021. Use of public transport reached levels not previously seen during the *All change?* series but remained significantly lower than they were during the pre-pandemic period.

The pandemic has been an extraordinary 'moment of change' in travel behaviour, particularly in terms of the use of public transport. Having increased in June/July 2020 as lockdown restrictions were eased, use of buses, trains and underground/metro services fell in November/December 2020 and again in February/March 2021 as restrictions were re-introduced. Overall and frequent use of these modes (once a week or more often) increased between February/March 2021 and May-June 2021 but, at that point, overall use of buses and trains was significantly lower than it had been in June/July 2020.

November 2021 saw the highest levels of use of public transport recorded during *All change?*

- Overall, 39% of people travelled by bus compared to 31% in May/June 2021 and 63% immediately before the pandemic.
- 32% travelled by train, an increase from 21% but lower than 63% pre-pandemic.
- 20% travelled by underground/metro, an increase from 14%, but lower than 40% pre-pandemic.

The profile of public transport users during the pandemic became markedly different in comparison to the period before it, and this remained the case in November 2021.

- Younger age groups, those from ethnic minority communities and those living in London formed a greater share of those who recently travelled by bus, train, underground and metro compared to the period before the pandemic (people with a disability formed a smaller share than before).
- For example, those aged 16-34 years old constituted 39% of train users before the pandemic but their share had grown to 59% by May/June 2021. It fell to 49% in November 2021 as more middle-aged and older age groups travelled by train.

As has been consistent throughout *All change?* the most common ways to make journeys during November 2021 were by car as a driver or passenger (alongside walking all the way to a destination). These were the most frequently used modes too. Levels of frequent car travel were higher in November 2021 than they were in May/June 2021.

In November 2021, overall levels of car travel were in line with levels during the easing of the first UK-wide lockdown in June/July 2020 but lower than the period immediately before the pandemic. Frequent use, however, was in line with the pre-pandemic period:

- During November 2021, just under two-thirds of people, 64%, travelled frequently (once a week or more often) as a car driver compared to 63% before the pandemic.
- A little over half of people, 51%, travelled frequently as a car passenger compared to 49% before the pandemic.

Overall levels of car driving were more mostly static, ranging from a low point of 63% of people during the first UK-wide lockdown in 2020 to a high of 68% in May/June 2021 and again in November 2021. By comparison, car passenger travel varied more substantially from a low of 43% of people during the first UK-wide lockdown, to 69% in June/July 2020 when restrictions were eased, and 70% in November 2021 after the lifting of restrictions.

The use of taxi/mini-cab services and app-based minicab services fell sharply during the first lockdown and again in winter 2020-21 having picked-up in June/July 2020.

- A higher proportion of 16-34-year-olds used taxi/mini-cabs before the pandemic (55%) than app-based minicab services (46%), but usage levels of these modes were very similar during the pandemic. In November 2021, a third of 16-34-year-olds used taxi/mini-cabs (33%) and a similar proportion used app-based minicab services (34%).

Levels of walking or wheeling all the way to a destination and cycling increased between February/March 2021 and May/June 2021, and again in November 2021, but remained significantly lower than they had been in June/July 2020, a potential effect of the weather being unseasonably poor in May 2021 and the onset of winter in November 2021. The seasonal influences on active travel were evident in the qualitative research which found a sense that some cycling and walking is "fairweather" by participants' own admission.

- 68% of people walked/wheeled all the way to a destination in November 2021 compared to 65% in May/June 2021 and 72% in June/July 2020.
- 17% cycled in November 2021,18% did this in May/June 2021 and 27% in June/July 2020.

In November 2021, just over a quarter of the public, 27%, said they had walked or wheeled all the way to a destination more during the previous four weeks than in the period immediately before the pandemic and 8% reported having cycled more (15% and 14% respectively said they had cycled and walked less).

- 61% said they had walked or cycled for pleasure or exercise in November 2021, 47% had travelled this way for essential journeys such as travel to work or shopping.
- In April/May 2020 during the first UK-wide lockdown, a third, 33%, said they had walked all the way to a destination more than they had done during the pre-pandemic period. By November 2021, the proportion had fallen to just over a quarter, 27%.

In general, the evidence continues to suggest that people increased their travel across all modes as restrictions were eased in May/June 2021 and again as they were fully lifted before November 2021, but the frequency of travel remained lower than pre-pandemic levels. Analysis shows that individuals' behaviour changed in several different ways; some changes were small and transient, others more substantial.

While a majority did *not* change how often they travelled by different modes when comparing November 2021 with the pre-pandemic period, the largest changes in frequency of use were car passenger travel and walking all the way to a destination. Use of some modes appeared to be complementary - for example, people who drove a car more frequently in November 2021 compared to the period immediately before the pandemic, were also more likely to have increased their car passenger travel over the period.

Analysis of the extent to which people either stopped or started using transport mode(s) for a selection of journey purposes shows a substantial degree of behaviour-change between the period immediately before the pandemic and November 2021. This was the case for 46% of UK adults including 15% who started *and* stopped using a mode(s).

In November 2021, 40% of UK adults said they had changed the way they made some journeys in the previous four weeks compared to before the pandemic, with qualitative research indicating that several types of change were likely to have been in respondents'

minds; changes in journey times, childcare duties, mixing working at home and commuting, working from home on different days to previously, commuting at different times/on different days, as well as changes in the modes used for commuting and leisure travel.

Women were significantly more likely than men to agree that they had changed how they made journeys, as were younger age groups and people in urban areas. Those who changed how they made journeys were more likely than average to have avoided public transport due to concerns about COVID-19 and to recall walking or cycling for pleasure/exercise during November 2021.

As restrictions were eased, there was an increase in people taking part in activities they were unable to do during lockdown. Motivations and opportunities to travel increased, especially those relating to leisure.

The increase in the average number of reasons for making journeys between May/June and November 2021 was driven more by travelling to access leisure than travelling to a workplace:

- Between May/June 2021 and November 2021, there was a 19-percentage point increase - from 17% to 36% - in the proportion of people who recalled travelling to go to a pub/bar/restaurant to sit inside (reflecting greater opportunity to do so after restrictions were lifted).
- Over the same period, there was a 17-percentage point increase for travelling to access arts/entertainment, from 7% to 24%, a 13-point increase for travelling to meet up with people indoors, from 19% to 32% and a 9 point-increase from 44% to 53% in the proportion who travelled to visit relatives/friends.
- 39% said they travelled (commuted) to a place of work, a modest 3-percentage point increase compared to May/June 2021.

2. To understand the public's perception of confidence in transport and their future travel planning

In November 2021, and for the first time in our series, higher proportions of UK adults were either very or fairly confident travelling by bus or train in the next four weeks than were not very confident or not at all confident.

Following an increase in levels of comfort travelling by public transport over the summer months during 2020, there was little change during the period between November/ December 2020 and February/March 2021. In May/June 2021, *All change?* found that levels of comfort would increase significantly *'if all restrictions are lifted'* and the prospect of all adults having been offered first and second dose vaccination boosted comfort levels even further.

In the event, people's comfort travelling by bus, train and underground/metro did not reach these levels in November 2021 - a period in which most restrictions had been lifted for several months (with a few exceptions) and during which all adults had been offered both doses of the COVID-19 vaccine. There was, however, a clear 'cross-over' in opinion for

bus and train travel between May/June 2021 and November 2021, with higher proportions of people positive rather than negative in November for the first time in our series. This trend did not happen for underground/metro travel although the proportion who said they would be not very or not at all comfortable travelling did fall.

- In November 2021, half of UK adults said they would be either very or fairly comfortable travelling by train in the next four weeks, higher than the 35% of people who said they would be not very or not at all comfortable.
- Similar proportions were comfortable with travelling by taxi; 47% were very or fairly comfortable and 33% were not very or not at all comfortable.
- Opinion was more polarised for travelling by bus; 45% said they would be comfortable travelling this way but 42% said they would not be comfortable. Comfort levels were significantly lower for travel by underground/metro and by aeroplane; 46% and 45% of people said they would be either not very or not at all comfortable travelling by these modes.
- Levels of comfort travelling by bus, by train and by underground/metro were higher among frequent users of each mode during the pre-pandemic period (January-March 2020) and among those who had travelled by each mode in the previous four weeks. Reflecting this, and as in May/June 2021, they tended to be higher among younger people, those with no access to a car or bicycle and those living in London.
- Geographical differences were less pronounced in November 2021 than they had been in May/June 2021 at the prospect of "all restrictions being lifted". For example, people in the North East of England and in Scotland were as comfortable travelling by bus as those in London in November 2021.
- For bus travel, differences in levels of comfort between those who had and had not been vaccinated were statistically significant - the unvaccinated group were relatively more comfortable (reflecting their younger age and other characteristics) - but no significant differences were found for these groups for train and underground/metro travel.

The qualitative research suggested that "comfort" had multiple meanings - for example, it could mean a comfortable seat or relate to familiarity with the mode - and it is possible that avoidance may have encompassed certain times of travelling or days of the week, as well as particular modes. Qualitative insights also underline the importance of necessity and habit in shaping people's knowledge, perceptions, and uses of modes.

There were significant falls in positive ratings of experiences among those who travelled by bus, by train and by underground/metro during November 2021 compared to May/June 2021. Face coverings being a mandatory requirement was considered important in encouraging public transport use, but more frequent and reliable services were also important.

While levels of bus travel were significantly below pre-pandemic levels, 14% of bus users in November 2021 reported that on their last journey passengers were standing with the service being crowded or very crowded. This experience was recalled by the same proportion of train users and by 24% of those who travelled by underground/metro. The

qualitative research found a perception that levels of crowding were approaching pre-pandemic levels.

The qualitative research also found the perceived lack of space to retain social distancing (particularly from those not wearing masks) in “overcrowded” buses and trains was an important salient concern among those who remained cautious about returning to public transport. Exposure to quieter trains and buses particularly during periods with tighter COVID-19 restrictions provided a first-hand experience of public transport without daily rush hour crowds. This contributed to a sense that people’s perceptions of what counts as “over-crowding” had changed; they associated “good” travel with fewer passengers and more space.

Face coverings being a mandatory requirement was top-mentioned among requirements considered important in encouraging public transport use, selected by 25%, reflecting findings from previous waves that the public were, on balance, positive about retaining mask-wearing.

- The proportion selecting financial incentives to use public transport (e.g. cheaper fares) as offering encouragement increased by three percentage points from 15% to 18% between May/June 2021 and November 2021. Qualitative research discussions found that participants had experienced substantial cost savings during the pandemic, and expected price rises for train travel in the New Year.
- There was an increase in the proportion of people who mentioned more frequent services between May/June 2021 and November 2021 (an increase from 14% to 18%) and services that run on time (an increase from 13% to 17%).

These changes highlight the growing importance of more frequent and reliable services in November 2021 compared to May/June 2021 - a point at which several restrictions remained in place. Lapsed users of public transport (people that had used public transport pre-pandemic but not in the previous four weeks, and constituting 9% of UK adults), were more likely than the wider public to identify mandatory face coverings and cases remaining low as motivating factors to use public transport.

3. To understand how social and attitudinal changes in response to COVID-19 (e.g. working from home) are impacting travel behaviour

Enforced working from home during the pandemic has led to a change in attitudes and preferences. There was not a ‘mass’ return to commuting after the lifting of restrictions in summer 2021 and the incidence of working from home varied according to sector and employer guidance as well as flexibility constraints. The qualitative research undertaken in November/December 2021 found uncertainty with commuting and travel patterns in a state of flux.

Before the full lifting of restrictions in summer 2021, *All change?* indicated a clear expectation among those in employment that they would continue commuting by the same mode they used pre-pandemic, although less frequently than before the pandemic. Qualitative research highlighted people’s continued preference for hybrid working to

remain in place (a mix of working from home and commuting), and the survey showed a modest increase in the proportion of those in employment travelling to a place of work.

- There was a seven-percentage point increase in the proportion of people in full- or part-time employment who travelled to a place of work at all in November 2021 (79%) compared to May/June 2021 (72%), when restrictions were still in place and people were still being discouraged from going into work in some parts of the UK.
- The proportion who worked from home 5 days a week in November 2021 (17%) was more than double the equivalent proportion in the period before the pandemic (8%).
- Those who travelled to a workplace by train immediately before the pandemic were more likely to have worked from home three or more days a week during November 2021; 42% compared to 26% of those who travelled by bus, 25% of those who travelled by car.
- 53% of those who worked 5 days a week or more often during November 2021, travelled to a place of work this frequently and 47% did not (including 19% who never did this). Among those who worked 3-4 days a week, 65% travelled to a place of work this frequently, while 55% of those who worked 2 days a week travelled to a place of work both days.

Despite the flexibility associated with hybrid working, qualitative research found that working from home varied according to industry/sector and employer guidance as well as flexibility constraints. These included perceptions of unreliable public transport in rural areas, the high cost of public transport, and parental responsibilities centred around school start and finish times. They limited the choice of transport modes or the ability of individuals to take advantage of flexible working patterns.

There was less evidence of change in terms of online shopping behaviours and home delivery of supermarket shopping between May/June 2021 and November 2021. Both were more common behaviours during November than they had been in the period immediately before the pandemic whereas the pattern of shopping close to home (within 15-20 minutes' walk) changed since the pre-pandemic period.

While there were some increases in willingness to travel more sustainably during the pandemic, levels of reliance on cars did not fundamentally change during 2020-2021.

In November 2021, many people said they wanted to travel sustainably in the future which had also been the case 18 months earlier during the first UK-wide lockdown. However, over the same period there was very little change in the proportion who agreed that 'I couldn't get by without using my car', as well as a significant increase in people's expectation of returning to doing all the things they did before the pandemic including holidays and travel. For example, in November 2021 - a month in which the COP26 conference was held in Glasgow[1] - there were some increases in willingness to travel more sustainably:

[1] The COP26 summit was held in Glasgow between 31 October 2021-12 November 2021. It brought parties together to accelerate action towards the goals of the Paris Agreement and the UN Framework Convention on Climate Change.

- Two-thirds of UK adults (67%) thought that climate change is as serious a crisis as Coronavirus, a statistically significant increase from 63% in April/May 2020.
- Four in ten (43%) said they were willing to limit flying, or switch modes to reduce flying and their contribution to climate change – a significant increase from 39% in April/May 2020.
- Willingness to use public transport more to reduce climate change increased from 34% to 40% over the same period.

However, over the same period there were decreases in willingness and expectations to do more active travel:

- 56% were willing to do more active travel to reduce climate change, a decrease from 62% in April/May 2020.
- 43% anticipated walking more in 12 months' time than they did before the pandemic, a decrease from 57% in April/May 2020.
- 15% anticipated cycling more in 12 months' time than they did before the pandemic, a decrease from 21% in April/May 2020.

Attitudes towards avoiding public transport softened; in the early stages of the pandemic, 39% of people said that they would be avoiding public transport in 12 months' time, but this had fallen to 34% by November 2021, a period when more people were travelling this way. However, some hesitancy remained and in November 2021 a third (32%) *disagreed* that 'the pandemic will make no difference to how often I use public transport in the future'.

In November 2021, the proportion of people expecting to 'go back' to doing all the things they did before the pandemic (43%), was higher than it had been in April/May 2020 (40%).

- In November 2021, the expectation to 'go back' to all pre-pandemic activities was higher among those who had used public transport in the past four weeks (49%), and lower among those who had not (36%).
- Half of lapsed public transport users (people who had used public transport pre-pandemic but not in the previous four weeks) expected to avoid public transport in 12 months' time, twice the proportion who didn't (26%).

In April/May 2020, 54% of UK adults, and 66% of people with access to a car or van, agreed that 'I couldn't get by without using my car'. This changed little as restrictions eased, reaching 56% of adults in May/June 2021, and 55% in November 2021. Consistent levels of perceived reliance reflect mostly static trends in the frequency of car driver travel during the course of the pandemic.

4. To identify how lower carbon emission behaviours (e.g. travelling off-peak and active travel) can be maintained

As had been the case throughout *All change?,* a majority of people in November 2021 said that they wanted to travel sustainably. However, evidence suggests that they also want, and expect, to return to previous behaviours and there are several impediments to lower carbon emission behaviours.

Earlier in the pandemic there was an increase in cycling and walking particularly for recreation[2] and qualitative research found that high levels of compliance with lockdown restrictions were instrumental in participants' decisions to walk more. According to the qualitative research, the sometimes-surprising convenience of being able to walk to local amenities also helped as well as the closure of gyms which motivated people to seek alternative forms of exercise. Participants recalled the incorporation of more active or sustainable travel into frequent journey routines. In November 2021, 62% said they would like to do more walking and or cycling in future for pleasure/ exercise.

Despite the physical and mental health benefits, the longer-term continuation of walking and cycling was doubted. Participants expected that cold winters, darker nights, the return to more commuting, and changing work patterns could potentially make this a temporary situation.

All Change? found "a pervasive use of and attachment to the car" evident in previous research.[3] While the overall proportion of people travelling by car - as a driver and as a passenger - had not reached pre-pandemic levels by November 2021, levels of frequent (once a week or more often) and very frequent use (5 days a week or more often) were in line.

According to longitudinal analysis, an equal proportion of people increased as reduced the number of vehicles they owned between April/March 2020 and November 2021 (there was a change in ownership among an estimated 12% of the population) and the qualitative research found evidence of people questioning the necessity of more than one car in their household now that commuting patterns were in flux. There was also some interest in options around purchasing or leasing an electric vehicle in the immediate or near future, with government-led support and policy such as Clean Air Zones flagged by participants as potential factors contributing to changes in behaviour and ownership.

Use of public transport increased between May/June and November 2021 but remained lower than pre-pandemic levels and many people avoided public transport.

- In November 2021, around 9% of UK adults were lapsed users of public transport, having travelled by any one of four public transport modes at least once in the pre-pandemic period but not during November.
- Those who travelled to a place of work in November 2021 were relatively less likely to have travelled by bus, train and as a car passenger compared to those who commuted before the pandemic (by comparison, the incidence of using private modes and active travel to travel to a place of work in November 2021 was in line with May/June 2021).
- Seven in ten lapsed users, 70%, said that they had avoided public transport during November 2021 because of concerns about Coronavirus, and 54% said they had avoided travelling by public transport at peak times for the same reasons.

[2] See, for example, https://www.sportengland.org/news/sport-and-physical-activity-must-be-used-level-and-tackle-inequalities

[3] *Decarbonising Transport Deliberative Research*, Britain Thinks for Department for Transport, December 2020.

- 29% of those who travelled to a place of work during November 2021 said that they had avoided public transport at peak times.

Necessity and habit remain important factors shaping people's travel and choice of modes. Efforts to increase the uptake of public transport will face additional, Coronavirus-related challenges, at least in the short-term.

Findings from *All change?* echo those of other research for DfT highlighting that convenience, comfort and cost, underpinned by habit, are by far the most important factors influencing travel decisions.[4] The reasons why many people do not feel able to travel more sustainably included the relative convenience, comfort and cost-effectiveness of driving as well as several barriers to active travel for some groups and geographies, including insufficient infrastructure and numerous safety concerns associated with the uptake of walking and cycling.

While the public are open to walking and/or cycling more, particularly when framed as a means of helping combat climate change, the environment was not an especially salient consideration. Similarly, other research by Ipsos MORI has found that the public support Net Zero policies when they are outlined initially, but support falls dramatically when they are presented with the possible lifestyle and financial cost implications for them personally.[5] Consequently, there remains some uncertainty about whether their adoption of walking and/or cycling will remain permanent, particularly if traffic levels were to increase.

Previous research for DfT has identified a number of potential interventions that would be most effective at encouraging use of more sustainable alternatives to travel (based on the 'Capability Opportunity Motivation – Behaviour' model, COM-B[6]). These options are supported by evidence generated by *All change?* which also confirms several inhibitors of sustainable, greener ways to travel which had pre-dated the pandemic, but we highlight three other areas for attention and, potentially, further research:

- **Addressing negative perceptions of public transport as a safe environment when concerns about Coronavirus or winter illnesses are heightened.** Participants made unfavourable comparisons between public transport and other modes including the lack of space making it harder to socially distance. The pandemic seems to have amplified a pre-existing sense of buses and trains being dirty and unhygienic. This further emphasised the value in messaging about the importance of sanitation and cleaning of surfaces - a message which has stuck in people's consciousness as key factors in how they assess their risk in travelling by public transport - particularly as the number of passengers increases.
- **The emergence of new social and business norms.** The behaviour of other passengers was often mentioned in qualitative research about travelling by public transport and influenced conceptions of safety. Passengers' experiences deteriorated during a period of increasing numbers of passengers following the

[4] See, for example, *Decarbonising Transport Deliberative Research*, Britain Thinks for Department for Transport, December 2020.
[5] https://www.ipsos.com/ipsos-mori/en-uk/almanac/public-support-majority-net-zero-policies-unless-there-is-a-personal-cost
[6] *'The Behaviour Change Wheel: A Guide to Designing Interventions'*, Susan Michie, Lou Atkins & Robert West, 2014, p. 59-60.

lifting of restrictions. Analysis shows a correlation between discomfort and the level of crowdedness with quieter, less crowded services during the pandemic probably shifting perceptions and tolerance levels. Norms around commuting have yet to settle given the interplay of shifting employer demands and employee preferences.

- **Offering greater flexibility and responding to expectations that transport should fit around people's personal lives.** *All change?* suggests people have become more discerning about why, when and how they make journeys; the pandemic has been disruptive and forced people out of default behaviours. People are keen to exercise more choice and to benefit from more flexible service arrangements and ticketing.

All change? Tracking travel during the pandemic

There was a significant change in travel behaviours during the pandemic. Principally, people reduced their travel at the onset of the pandemic with the introduction of restrictions which then increased as restrictions were eased. Travelling for leisure reasons was a particularly important reason for the increase in journey-making throughout 2021. Continued working from home played an important role constraining the use of public transport, particularly in the case of train travel.

While overall use of public transport remained much lower than it had been immediately before the pandemic, the proportions who travelled as a car driver and as a passenger were close to pre-pandemic levels in November 2021. There is, though, little evidence to suggest that large proportions of people have switched from using public transport to using a car, or more generally, between modes.

All change? found some movement in individual-level behaviour between the pre-pandemic period and November 2021 underneath an apparently unchanged aggregate picture – for example, 18% of the longitudinal cohort reduced the frequency they travelled as a car driver while 15% travelled this way more often, 6% acquired a car, 6% got rid of one. Four in ten people recalled changes to the way they had made some journeys compared to before the pandemic, including changing modes.

Alongside change, however, *All change?* found considerable continuity particularly in terms of the factors shaping people's travel and choice of modes. Moreover, in November 2021 there was uncertainty about the extent to which new habits would endure, particularly given the impact of seasonal variations and the potential disruption of new variants. There was also some ongoing hesitancy about using public transport which looked set to continue being important in Coronavirus' endemic phase.

Introduction

This report presents findings from analysis of a UK-wide survey commissioned by the Department for Transport (DfT) and undertaken during November 2021. It also draws on qualitative research conducted during November-December 2021 (further detailed findings from the qualitative research are available in a separate report).

The *All change?* survey was part of a longitudinal programme of research for DfT which included qualitative and quantitative components. Since spring 2020, Ipsos MORI has tracked changes in behaviour among the same group of people over time, using qualitative research to explore behaviours and attitudes in more depth. Findings from the first, second, third, fourth and fifth surveys, and from qualitative research, have been published by DfT[7].

All change? has informed DfT's response to COVID-19, its planning for infrastructure investment and strategic priorities including lower carbon behaviours and the 'levelling-up' agenda. Insights have been used to identify how different groups of people in different types of areas including rural areas and different parts of the UK have been impacted, how they have responded to COVID-19, and how they can be best supported.

All change? was designed to address several key research objectives. These form the structure of the Executive summary of this report and are listed below:

- To track changes in travel behaviour in response to COVID-19 and to understand whether changes are maintained in the medium to longer-term
- To understand the public's perception of confidence in transport and their future travel planning
- To understand how social and attitudinal changes in response to COVID-19 (such as working from home) have impacted travel behaviour
- To identify how lower carbon emission behaviours (such as travelling off-peak and active travel) can be maintained

Survey methodology

Ipsos MORI conducted the first online survey of the *All change?* research programme during spring 2020. The survey involved 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 people from ethnic minority groups (securing a sample of 455 among this group). Data was weighted to the known UK population profile by age, gender, working status, ethnicity and social grade.

As at waves 2, 3, 4 and 5, respondents at wave 6 were drawn from those that 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'

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

sample (meaning that there is no 'cross-sectional' analysis this wave). At wave 4, a targeted '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). Waves 5 and 6 also involved a full top-up exercise to secure samples of over 4,000.

At each wave, the survey questionnaire was translated into the Welsh language with respondents in Wales given the choice of whether to complete the survey in Welsh or in English.

Of the 4,163 respondents who took part at wave 6, 2,720 had previously participated in wave 5, and 926 had taken part at all five of the previous waves. Throughout this report, we present results from analysis involving all respondents but also a more detailed longitudinal look at changes in behaviour among the 2,198 respondents who took part at waves 5 and 6 in order to understand the extent of most recent change and to describe how behaviour has 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 (which can mask change).

Further detail regarding the profile of the overall sample at Wave 6, covering particular demographic groups and nations of the UK, is provided in Appendix A.

Survey fieldwork dates, restrictions and reference periods

Wave 6 survey fieldwork was undertaken between **4-29 November 2021** in England, Scotland, Wales and Northern Ireland. This followed fieldwork for previous waves 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**
5	**17 May-8 June 2021**
6	**4-29 November 2021**

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 defined as "between January and March 2020". Reflecting the fieldwork dates for previous waves, our report describes behaviours relating to:

- **April/May 2020** – Wave 1

- **June/July 2020** – Wave 2
- **November/December 2020** – Wave 3
- **February/March 2021** – Wave 4
- **May/June 2021** – Wave 5
- **November 2021** – Wave 6

Several important developments occurred between the survey waves. These are summarised in Table 2 and described in more detail below.

Table 2: Survey waves and restrictions/context during reference periods

Wave	Summary of reference period and restrictions/context
1	The four weeks prior to wave 1 fieldwork coincided with the first UK-wide lockdown.
2	A four-week period during which restrictions were eased.
3	A four-week period during which tighter restrictions were in place.
4	Another period of lockdown and the roll-out of the vaccination programme; the Roadmap for England was announced just before the start of fieldwork.
5	A period during which restrictions were eased; Step 3 of the Roadmap was reached but Step 4 was postponed; during fieldwork there was media coverage of the Delta variant.
6	A period following the lifting of all legal limits to social contact (with some exceptions and variation across the UK); there was media coverage of rising case numbers and what became known as the Omicron variant towards the end of fieldwork.

While wave 1 took place during the full, UK-wide national lockdown period, wave 2 followed the easing of restrictions including the opening of pubs, restaurants and hairdressers on 4th July 2020 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 3rd July, in Wales (outside only) on 13th July and Scotland on 15th July.

On 24th July 2020, 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 15th June) and restrictions were placed on Greater Manchester and parts of East Lancashire and Yorkshire (30th July) following the introduction of local lockdown restrictions in Leicester on 29th June.

Wave 3 fieldwork was conducted during a second lockdown in England which started on Thursday 5th November 2020 and finished on Wednesday 2nd December 2020. 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 (although clinically vulnerable groups and over-60s were advised to limit social contacts and follow rules carefully).

The Prime Minister announced the third lockdown in England on 4th January 2021 (which took effect on 6th January), with Wales, Scotland and Northern Ireland also using lockdown restrictions. The UK Government's Roadmap for England was announced just before the start of wave 4 fieldwork on 22nd February.

Fieldwork for wave 5 started on 17th May - after Step 3 of the Roadmap for easing lockdown restrictions in England had come into effect - and finished on 8th June 2021. Restrictions were also being eased during this period in Scotland, Wales, and Northern Ireland, although following a different timetable to England. The survey was completed before Step 4 was postponed and asked about behaviours relating to the past 4 weeks as well as likely behaviour *"…if all restrictions are lifted (this is currently scheduled to be no earlier than 21st June)"*. It took place at a time when the Delta variant was receiving increasing national attention.

In between the fifth and sixth waves of fieldwork, the NHS started delivering COVID-19 booster jabs to people in eligible groups and started rolling out vaccination to include school children aged 12-15. At the point that wave 6 fieldwork was completed, 68% of the population had received a second dose of the COVID-19 vaccine. An identical proportion of our (entirely adult) sample had received two doses; 19% had received a booster jab.

Fieldwork for the sixth wave started on 4th November 2021, several months after the UK Government removed all legal limits on social contact in England on 19th July. Restrictions had also been lifted in other nations within the UK although some variation remained – for example:

- On 19th July, employers in Wales were encouraged to let people work from home where possible. Face masks remained mandatory on public transport, at indoor venues etc.
- On 9th August, Scotland moved to "beyond level 0". The advice remained that people should work from home and face masks remained mandatory on public transport, at indoor venues etc.
- On 19th November, the Health minister in Northern Ireland advised working from home due to rising rates of transmission.

Concerns about a new variant of COVID-19 (subsequently called Omicron), were covered in the media on 25th November, shortly before the end of fieldwork on the 29th, and its rapid spread prompted the announcement on 8th December of Plan B in England involving several restrictions being re-introduced. Similar action was taken in Scotland, Wales and Northern Ireland.

Modes of transport covered by surveys

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 survey 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 6 survey overall, we can expect an overall sampling tolerance of +/- 1.5 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 6 data, and the longitudinal cohort (the sub-sample of respondents who took part at waves 5 and 6), reflecting attrition between waves and the difference in profile between the achieved sample at wave 6 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 who took part in waves 1 and 2 involving ‘top-up’ samples.

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.

Qualitative research and interpretation

The qualitative research involved 10 online focus group discussions and 15 in-depth interviews exploring how a range of people in England made decisions about travelling. Fieldwork took place between 8th November and 3rd December 2021. Participants were recruited via free-find methods.

The group discussions were designed to bring together different types of transport users to share and discuss their experiences of travelling during the pandemic. These groups were segmented by transport mode, frequency of current commute, commuting length, urbanity and quotas were set on active travel. Recruitment for the in-depth interviews focused on people in employment with targets to achieve a mix of standard demographics such as age, gender, ethnicity, region supplemented with quotas to sample parents of school children, different commuting frequency (pre-pandemic and present), length of commute, and mode switching.

Qualitative research is illustrative, detailed, and exploratory. It offers insight into the perceptions, feelings, and behaviours of people. The insights presented here are intended to demonstrate the views and experiences of the target sample and the reasons for their behaviour, and not to be a statistically representative sample of the wider population.

Throughout the report, we sometimes indicate findings from the qualitative research by referring to ‘participants’ and from the survey by referring to ‘respondents’.

1 How often and why did people travel in November 2021?

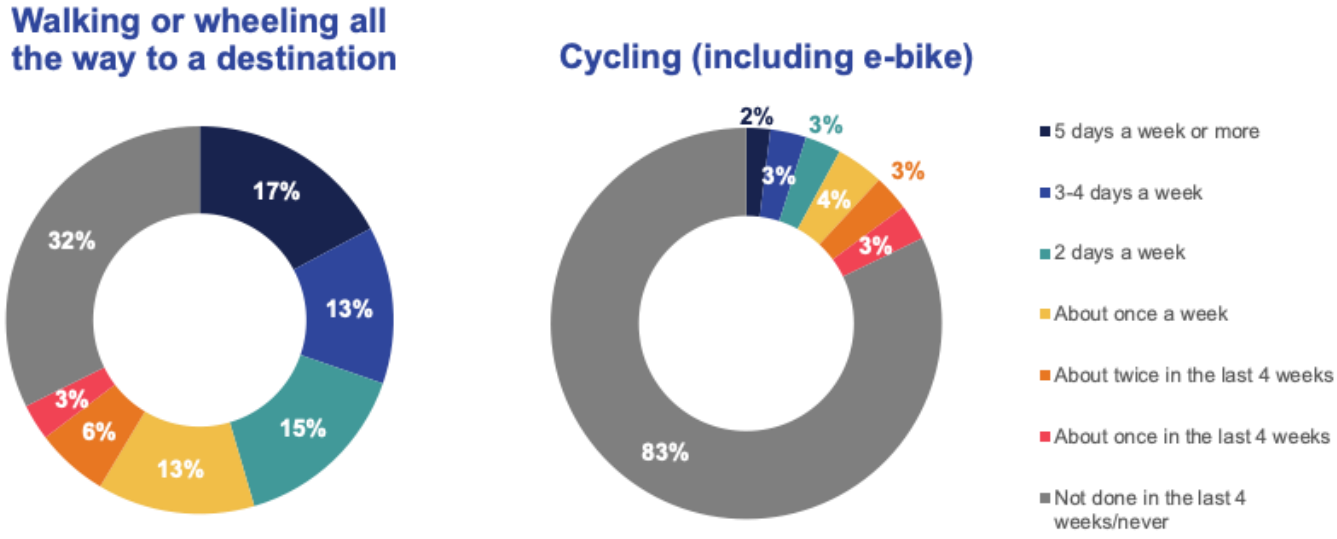
As with previous waves of *All change?*, travelling by car and walking or wheeling a wheelchair or motorised scooter all the way to a destination were the most commonly used modes of transport across the UK during November 2021. In the previous four-week period, around seven in ten (68%) of the UK public walked or wheeled all the way to a destination at least once, travelled by driving a car (68%) or as a car passenger (70%).

In this section, we provide details of transport use across the most frequently used modes during November, and we also describe the main reasons people gave for using each mode.

1.1 Active travel

Just under seven in ten (68%) of the UK public walked or wheeled all the way to a destination at least once during the past four weeks in November 2021 including 59% who did this once a week or more often, split between 17% who did this five days a week or more often, 13% who did this 3-4 days a week and 15% two days a week or more (shown in Figure 1). A third, 32%, said they did *not* walk or wheel a wheelchair or motorised scooter all the way to a destination in the previous four weeks in November 2021, compared to 83% who said they did *not* cycle during this period.

Figure 1: Frequency of active travel during November 2021



Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021
Q1a. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport? It does not matter how long the journey was, or why you made it.

A majority, 56%, of those who travelled for recreation reasons or to keep fit, walked all the way to their destination while 13% cycled for this reason.

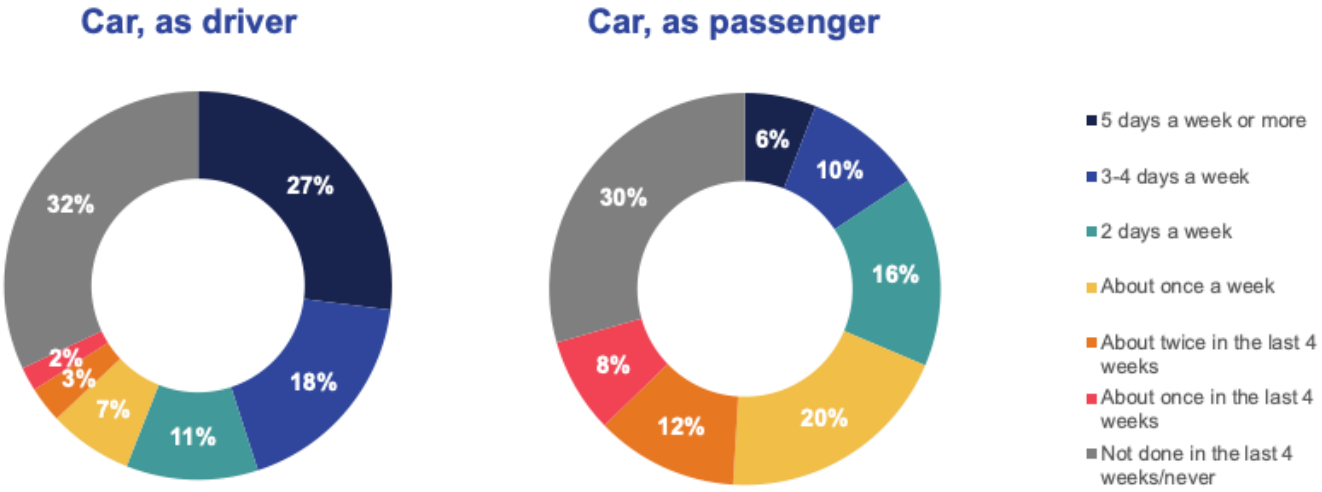
Walking or wheeling all the way to a destination was done for a variety of reasons; notably, 37% of those who travelled to access services (such as hairdressers, libraries, estate agents and banks) walked there, as did 35% of those who went to a pub/bar/restaurant to sit outside and 32% of those who went shopping and of those travelling to a place of education (as a pupil/student). Similarly, 30% of those who travelled to meet up with people outdoors walked there, as did 27% of those who travelled to pick up or drop off children at a school/place of education/nursery etc.

1.2 Travel by car and taxi

Alongside walking or wheeling all the way to a destination, travelling by car as a driver and as a car passenger were among the most common ways of travelling during November 2021. Just under seven in ten, 68%, said they travelled by driving a car at least once in the previous four weeks, and 70% of people travelled as a car passenger.

In November 2021, 64% said they drove a car at least once a week in the previous four weeks while 51% travelled this frequently as a car passenger (shown in Figure 2). Just over a quarter, 27%, said they drove a car five days a week or more often, 18% drove 3 or 4 days a week, and 7% once a week. One in five (20%) of those who travelled as a car passenger did this about once a week, and 31% travelled this way 2 days a week or more frequently.

Figure 2: Frequency of driving or travelling as a car passenger during November 2021



Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021
Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport? It does not matter how long the journey was, or why you made it.

In November 2021, 86% of those who gave a lift(s) to friends/relatives for reasons other than to a school/place of education did so by driving, 14% as a fellow passenger in a car. Driving by car was also a common mode among those who picked up or dropped off children at school/place of education/nursery etc. (66%) and those who ran errands for people (62%). A similar proportion of those commuting to a place of work (60%), visiting friends or relatives (59%) and shopping (58%) also drove.

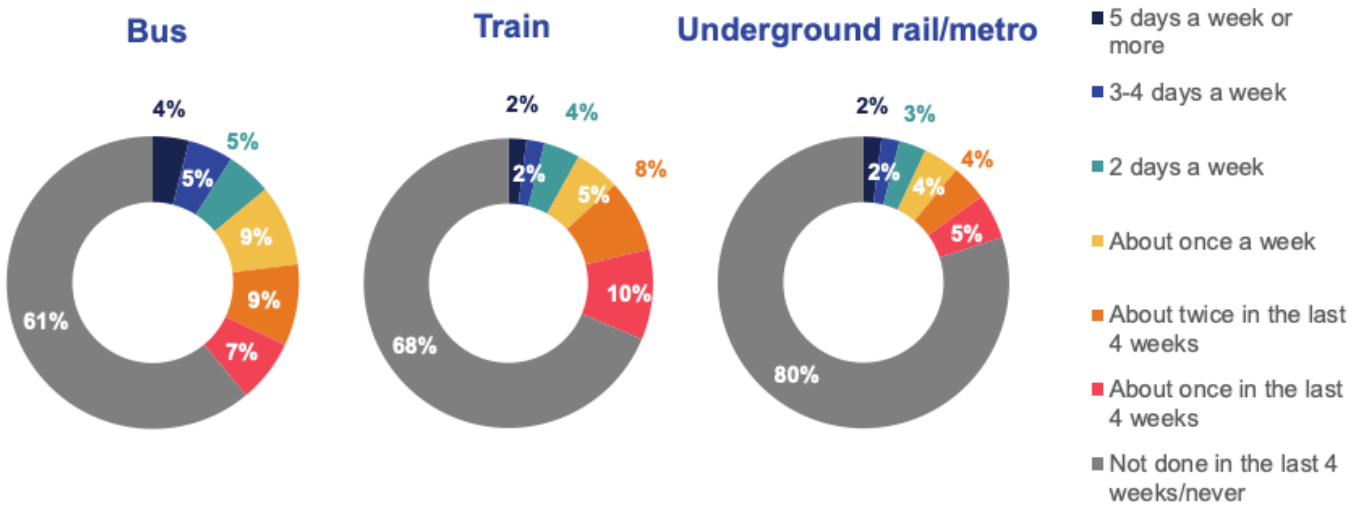
During November, 36% of those who travelled for a holiday, or a day trip, somewhere travelled as a car passenger (37% drove there), as did 33% of those who travelled to visit friends/relatives, 32% of those who went to a pub/bar/restaurant to sit inside and 31% of those who travelled to meet up with people indoors.

Just under a quarter, 23%, used a taxi/black cab at least once in the previous four weeks in November 2021 while 17% used app-based minicab services such as Uber during this period. Taxis were used for a variety of reasons during November 2021 e.g. 9% of those that went to a pub/bar/restaurant to sit outside travelled there by taxi/black cab while 8% travelled by using an app-based minicab service; 6% and 5% respectively used these modes to go to a pub/bar/restaurant to sit inside.

1.3 Travel by public transport

Four in ten people, 39%, said they travelled by bus at least once in the previous four weeks in November, higher than the proportion who travelled by train (32%) and by underground/metro (20%). This included 22% who travelled by bus once a week or more, and 9% that did so three days a week or more often (shown in Figure 3). By contrast, fewer people who travelled by train or underground/metro did so frequently: just 4% used these modes at least three times per week.

Figure 3: Frequency of underground rail/metro, bus and train use during November 2021



Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021
Q1a. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport? It does not matter how long the journey was, or why you made it.

Reflecting the age profile of bus users during November 2021, 24% of those who travelled to a place of education did so by bus. Among those commuting to a place of work, 14% travelled by bus, 10% by train and 8% by underground/metro.

Among those who travelled to access entertainment, arts and events, 16% did this by bus, 14% by train and the same proportion travelled by underground/metro. However, travelling for a holiday or day trip somewhere was much more commonly done by train (24%) than by bus (11%), coach (7%) or underground/metro (7%).

Travel by train accounted for a larger proportion of business travel; 19% of those who travelled for this reason did so by train, compared with 15% by underground/metro and 13% by bus.

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. We compare behaviours during November 2021 (wave 6) with May/June 2021 (wave 5). In May/June 2021, England was at Step 3 of the Roadmap out of lockdown and restrictions were also being eased during this period in Scotland, Wales, and Northern Ireland. By contrast, November 2021 was several months after the UK Government removed all legal limits on social contact in England on 19th July and restrictions had also been lifted in other nations within the UK (although some variation remained).

Concerns about a new variant of COVID-19 (subsequently called Omicron), were covered in the media on 25th November shortly before the end of fieldwork for wave 6 which finished on 29th November. The rapid spread of the Omicron variant prompted the announcement on 8th December of Plan B in England and a similar reintroduction of some restrictions in Scotland, Wales and Northern Ireland.

We also compare travel behaviour in November 2021 with January-March 2020, the pre-pandemic period before the start of the first UK-wide lockdown. We 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 trends in travel behaviour

The frequency of travel across modes had previously increased between February/March 2021 (wave 4) and May/June 2021 (wave 5), a period when restrictions were being eased across the UK. Restrictions were lifted in July 2021 and travel continued to increase until the sixth *All change?* survey in November 2021.

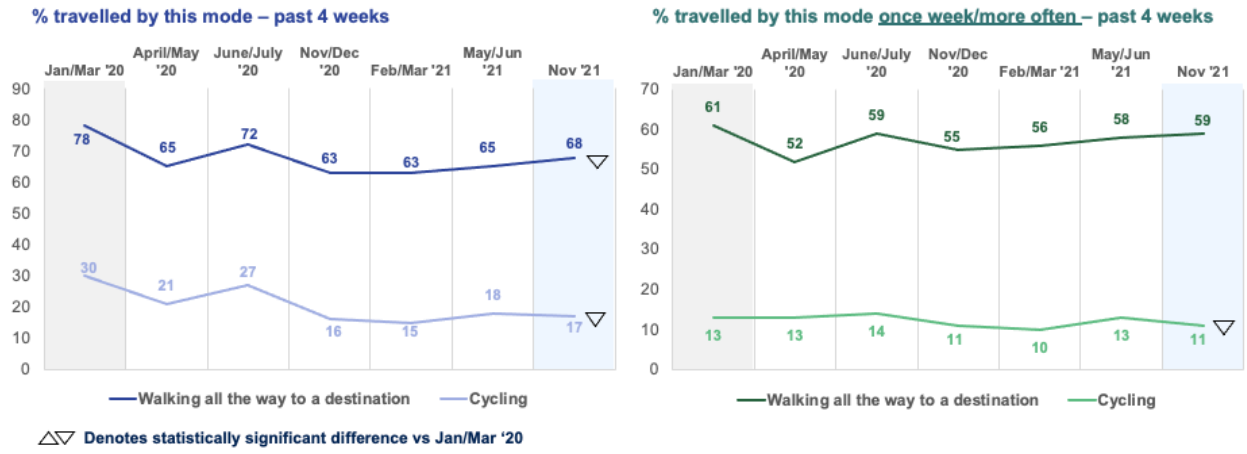
Public transport saw particularly large increases in levels of use which reached their highest point across the series of *All change?* surveys. Nevertheless, the most common ways to make journeys remained by car as a driver and as a car passenger, alongside walking all the way to a destination - these were also the most frequently used methods – and use of public transport remained significantly lower than pre-pandemic levels.

As shown in Figure 4, levels of walking or wheeling all the way to a destination increased to 65% in May/June 2021, and again in to 68% in November 2021, but remained significantly lower than they had been in June/July 2020 (72%). The proportion cycling (17%) was in line with May/June 2021 (18%) but, again, significantly lower than June/July 2020 (27%).

In November 2021, 61% said they had walked or cycled for pleasure or exercise in the previous four weeks and 47% said they had travelled this way for essential journeys such as travelling to work or shopping. Fewer than one in ten, 8%, reported having cycled more during the past four weeks compared to the period immediately before the pandemic (15% said they had cycled less).

Just over a quarter, 27%, said they had walked all the way to a destination more than they had done during the pre-pandemic period (14% said they had done this less), a smaller proportion than the third (33%) who said the same during April/May 2020 - the first UK-wide lockdown. These findings may be a potential effect of the weather as well as the restrictions in place at the time; the weather was unseasonably good in April 2020 and poor in May 2021 while November 2021 saw the onset of winter. Seasonal influences on active travel were evident in the qualitative research too; this found a sense that some cycling and walking is "fairweather" and seasonal.

Figure 4: Frequency of active travel during November 2021 compared to the five previous *All change?* surveys and January-March 2020

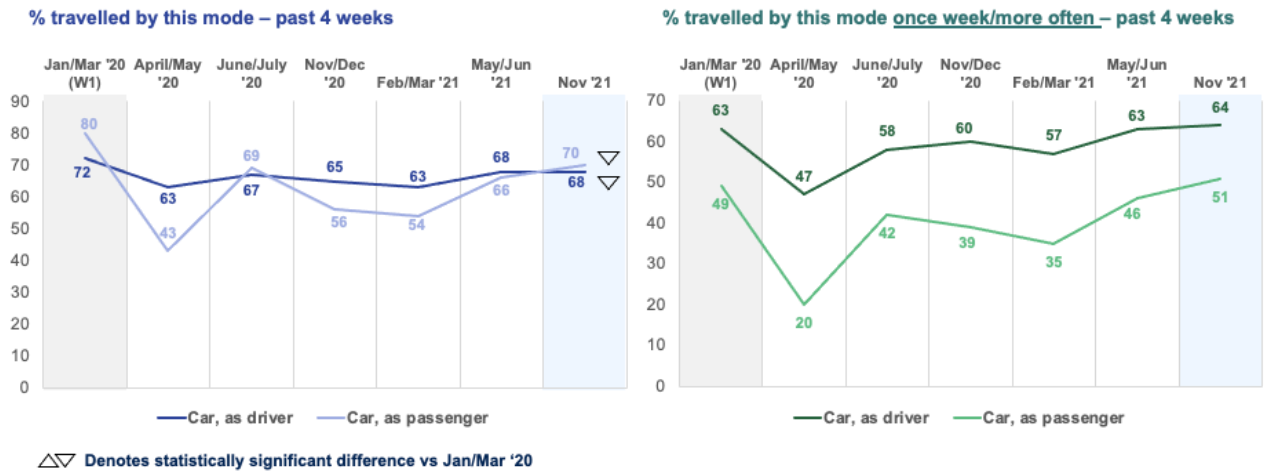


Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021; 4,700 UK adults (Wave 5), 17 May-8 June 2021; 3,388 UK adults, 23 Feb-9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown).
Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport?
Q7. Now thinking back to the period immediately before the 'lockdown', that is the period between 1st January 2020 and the 23rd March, how often, if at all, would you say you personally travelled by the following modes of transport?

Overall levels of car driving have been mostly static throughout the *All change?* series of surveys, shown in Figure 5, ranging from a low point of 63% of people during the first UK-wide lockdown to a high of 68% in May/June 2021 and 68% again in November 2021. Similarly, frequent travelling by car as a driver (at least once per week) was 64% in November 2021, in line with before the pandemic (63%). By comparison, the incidence of travelling as a car passenger varied more substantially; it was as low as 43% during the first UK-wide lockdown, to 69% in June/July 2020 when restrictions were eased, and 70% in November 2021 after the lifting of restrictions.

The use of taxi/mini-cab services and app-based minicab services also fell sharply during the first lockdown and again in winter 2020-21 having picked-up during June/July 2020.

Figure 5: Frequency of car use (as driver or passenger) during November 2021 compared to the five previous *All change?* surveys and January-March 2020

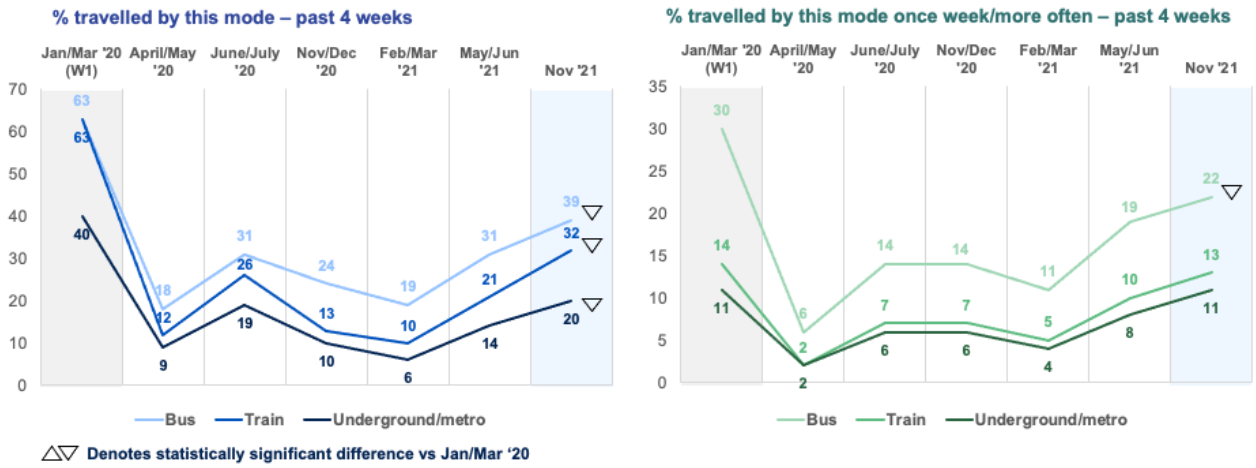


Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021; 4,700 UK adults (Wave 5), 17 May-8 June 2021; 3,388 UK adults, 23 Feb-9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3); 4,061 UK adults, 21 July-3 August 2020 (wave 2); 4,059 UK adults, 15-22 May 2020 in England, Scotland and Northern Ireland, 28 May-4 June 2020 in Wales (wave 1), January-March 2020 (pre-lockdown).
Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport?
Q7. Now thinking back to the period immediately before the 'lockdown', that is the period between 1st January 2020 and the 23rd March, how often, if at all, would you say you personally travelled by the following modes of transport?

Use of public transport increased significantly between May/June 2021 and November 2021. In May/June 2021, 38% of the UK public travelled by at least one public transport mode - bus, train, underground/metro tram - at least once, but this increased to 51% in November 2021 in line with 52% before the pandemic. The proportion that had travelled by each mode had also increased, as shown in Figure 6; bus use increased from 31% in May/June 2021 to 39% in November 2021, train use from 21% to 32% over the same period, and underground/metro use from 14% to 20%.

The proportion that travelled frequently by bus, train and underground/metro during November 2021 - once a week or more often - was also higher than it had been in May/June 2021, by three percentage points in each case. In November 2021, 22% travelled by bus once a week or more often (up from 19% in May/June 2021), 13% by train (up from 10%) and 11% by underground/metro (up from 8%).

Figure 6: Frequency of public transport use during November 2021 compared to the five previous *All change?* surveys and January-March 2020



Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021; 4,700 UK adults (Wave 5), 17 May-8 June 2021; 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).
Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport?
Q7. Now thinking back to the period immediately before the 'lockdown', that is the period between 1st January 2020 and the 23rd March, how often, if at all, would you say you personally travelled by the following modes of transport?

2.2 Travel behaviour among selected groups and geographies

Tables C.1 to C.9 included in Appendix C show the proportion of people within various subgroups and geographies who travelled at least once by each mode in the period before the first UK-wide lockdown (January-March 2020), followed by equivalent behaviours in the previous four weeks for each of the six survey waves.

Cycling

Table C.1 shows that the incidence of cycling in November 2021 was in line with May/June 2021 - despite the onset of winter in November 2021 and the lifting of restrictions - having previously increased from February/ March 2021 to May/June 2021. The proportion who cycled in November 2021 was also in line with that 12-months earlier in November/December 2020 but remained significantly lower than it had been in June/July 2020, in April/May 2020, and before the pandemic.

The incidence of cycling in November 2021 was in line with May/June 2021 for all age groups, among ethnic minority groups and in different parts of the UK. The largest change in the incidence of cycling was among low-income households (earning up to £16,106 per annum); cycling was more common in November 2021 - this increased from 10% to 19% among this group.

Walking or wheeling all the way to a destination

As shown in Table C.2, across the UK, the proportion of those who walked or wheeled all the way to a destination in the previous four weeks increased between May/June 2021 and November 2021; consequently, this way of travelling was higher in November 2021 than it

had been in any survey since last summer (June/July 2020) but remained significantly lower than pre-pandemic levels.

Those from ethnic minority groups (71%), younger adults aged 16-34 (71%) and those who don't own a car or a bicycle (80%) remained the groups most likely to have walked all the way to a destination in November 2021. After a steady increase since February/March 2021, men were also more likely than women to have walked all the way to a destination in November 2021 - 71% compared to 65% (both genders had been equally likely to travel this way before the pandemic).

The incidence of walking all the way to a destination increased sharply between May/June 2021 and November 2021 among those who don't own a car or a bicycle (from 73% to 80%). Walking had also become more common among all but the youngest age group and increased by four percentage points among those in full- or part-time employment (64% to 68%) although incidence remained below that before the pandemic for each of these groups.

In England, more people walked all the way to a destination than in May/June 2021 (68% compared to 65%) and there was a similar scale of increase in Scotland (from 63% to 68%). After a drop of nine percentage points in incidence in Northern Ireland over the period between February/March 2021 and May/June 2021, there was a seven-point increase between May/June and November 2021.

Car as a driver

The proportion of those who travelled as a car driver at least once in November 2021 (68%) matched that in May/June 2021 (also 68%) and the highest incidence during the *All change?* series but was, nonetheless, below pre-pandemic levels (72%).

In November 2021, the proportion who had travelled by car as a driver in the previous four weeks remained lowest among low-income households (53% travelled this way), ethnic minority groups (59%) and adults aged 16-34 (62%), as shown in Table C.3. For most groups and geographies, the incidence of travelling this way at least once during November 2021 was in line with that in May/June 2021. However, incidence increased by eight percentage points in Northern Ireland from 72% to 80%.

Car as a passenger

A higher proportion travelled as a car passenger in November 2021 (70%) than in May/June 2021 (66%) and during June/July 2020 when restrictions were eased (69%). While November saw the highest levels of car passenger travel, this was lower than pre-pandemic levels of use (80%).

Car passenger travel during November 2021 was most common among younger adults aged 16-34 years old (80%) - as it had been in May/June 2021 (81%) - but incidence increased more among those aged 35-54 and 55-75; up eight percentage points (to 69%) and six points (to 62%) respectively.

In Scotland, travelling this way increased eight points from 61% in May/June 2021 to 69% in November 2021, bringing it in line with England (70%) and Wales (70%). There was a six-point increase in Northern Ireland - from 73% to 79%.

Car passenger travel increased most significantly among those from low-income households; by 14 percentage points from 52% in May/June 2021 to 66% in November 2021. It also became more common among people with a disability, those in full- or part time employment and those who don't own a car or bicycle. There were increases of five percentage points for each of these groups, as shown in Table C.4.

Taxi and app-based minicab services

The use of taxi/black cab services (shown in Table C.5) and app-based minicab services such as Uber (Table C.6) continued to increase between May/June 2021 and November 2021. A higher proportion travelled using these services in November 2021 than at any time since June/July 2020, although usage levels remained significantly below those before the pandemic.

From a low base in May/June 2021, there was a particularly large increase in use of both taxi/black cab services and app-based minicab services among low-income households. Use increased by 13 percentage points among this group, from 11% to 24%, and by 14 points from 5% to 19% for app-based minicab services.

Similarly, in Scotland, the proportion travelling by taxi/black cab services almost doubled between May/June 2021 and November 2021 from 16% to 31%, and the proportion using app-based minicab services increased from 6% to 16%.

Usage of taxi/black cab and app-based minicab services was highest among 16-34-year-olds, as it had been before the pandemic. Over half, 55%, of 16-34-year-olds travelled by taxi/black cabs before the pandemic. While use increased among this group after falling sharply during the first UK-wide lockdown and reached 37% in June/July 2020, it fell again before increasing to 33% in November 2021.

A higher proportion of this age group used taxi/black cabs before the pandemic (55%) than app-based minicab services (46%) but usage levels of these modes were very similar during the pandemic. In November 2021, a third of 16-34-year-olds used taxi/black cabs (33%) and the same proportion used app-based minicab services (34%).

Public transport

As shown in Table C.7, 39% of adults travelled by bus in November 2021, an eight-percentage point increase since May/June 2021. In November 2021, travelling by bus was most common among the same groups as it had been in May/June 2021 and the incidence of use increased among all of these.

Seven in ten (70%) of those who don't own a car or a bicycle, travelled by bus at least once during November 2021, a 10-percentage point increase from 60% in May/June 2021. There was a similar increase among ethnic minority groups (from 49% to 59%) and among older adults aged 55-75 (from 23% to 35%) but younger age groups remained the most

common users; half, 50%, travelled by bus during November 2021, although 72% did so before the pandemic.

As shown in Table C.8, travel by train increased from 21% in May/June 2021 to 32% in November 2021, reaching its highest level since the pandemic started although still only around half of levels immediately before the pandemic (63%). As with buses, travel by train increased consistently across sub-groups and geographies with the highest rates of use in November 2021 among younger adults aged 16-34 (47%), ethnic minority groups (49%) and those who don't own a car or bicycle (41%). For several groups, the incidence of travelling by train at least once doubled between May/June 2021 and November 2021 including those living in Scotland (from 15% to 31%), in low-income households (from 14% to 28%) and older adults aged 55-75 (from 10% to 20%).

Across the UK, travelling by underground/metro increased from 14% to 20%, the highest level recorded during *All change?* but far lower than the period before the pandemic (40%). As shown in Table C.9, in London, where travel by underground/metro is far more common, travel by this mode increased from 52% in May/June 2021 to 67% in November 2021, lower than pre-pandemic (84%) but much higher than it had been in February/ March 2021 (26%). Usage also increased in the North East of England during November 2021 (26%) but was half its pre-pandemic level (50%).

Travel by underground/metro remained particularly common among younger and ethnic minority groups and increased significantly between May/June 2021 and November 2021 for the latter, from 35% to 46%. There were also large increases among those that do not own a car or bicycle (from 18% to 27%), those in full- or part-time employment (from 17% to 26%) and low-income households (from 7% to 17%).

The profile of public transport users during the pandemic became markedly different in comparison to the period before it, and this remained the case in November 2021. Younger age groups, those from ethnic minority communities and those living in London formed a greater share of those who recently travelled by bus, train, and underground/ metro compared to the period before the pandemic. As an example, those aged 16-34 years old made up 39% of train users immediately before the pandemic but their share had grown to 59% by May/June 2021 and fell to 49% in November 2021 as more middle-aged and older age groups travelled by train. Similarly, younger age groups, those from ethnic minority communities and those living in London continued to constitute a greater share of those who recently travelled by bus, by train, and by underground/metro services compared to the period before the pandemic, while those with a disability make up a smaller share than they did previously.

Overall, the profile of those who travelled by any form of public transport during November 2021 was younger - 42% of this group were aged 34 or less - and disproportionately concentrated in urban areas, particularly London (22%) with no access to a car/van (31%).

Lapsed users of public transport - people that had used public transport pre-pandemic but not in the previous four weeks - accounted for 9% of UK adults in November 2021. They were reflective of the wider population and had a similar profile in terms of their vaccination

status, but they were also older; 37% were aged 55-75 years old. Associated with this, lapsed users were less likely to be in full-time employment and more likely to have access to a car, a van, or a bicycle.

3 What journeys did people make, how and why?

This section describes the reasons why people travelled during November 2021 and what modes of transport they used for these journeys. It also provides an overview of why and how people travelled throughout the *All Change?* programme and a comparison to the period before the start of the pandemic (between January-March 2020). It finishes with a more detailed look at patterns in behaviour in terms of travelling to a place of work and shopping.

Fieldwork for the sixth survey took place between 4-29 November, a period in which there were relatively few restrictions in place across the UK. With a few exceptions and some variation across the UK, restrictions had been lifted in England on 19th July, in Wales on 7th August, in Scotland 9th August and Northern Ireland on 16th August. Emerging concerns about the Omicron variant started appearing in the media towards the end of the fieldwork period, on 25th November.

3.1 Why did people travel?

Following the lifting of restrictions during the summer of 2021, people made more journeys for more reasons in November 2021. They recalled an average of 4.8 reasons for travelling in November 2021, a higher number than in May/June 2021 when people travelled for an average of 4.1 reasons. In February/March 2021 and November/December 2020 - two periods of lockdown - people travelled for just over two reasons on average as shown in Table 3.

Table 3: Average number of reasons people made journeys at waves 3-6 compared to the pre-pandemic period (January-March 2020)

Wave	Period	Average no. of reasons
-	January-March 2020*	6.0
3	November/December 2020	2.5
4	February/March 2021	2.2
5	May/June 2021	4.1
6	November 2021	4.8

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 3,388 UK adults, 23 Feb-9 March 2021 (Wave 4); 3,178 UK adults, 27 Nov-7 Dec 2020 (Wave 3)
* January-March 2020 recall from Wave 6 survey
Q2aNEW. Still thinking again about the last 4 weeks, for which of these reasons, if any, have you made a journey of any kind. It does not matter which mode(s) of transport you used.
Q2cNEW. Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, for which of these reasons, if any, did you make a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.
Respondents were shown a list of 16 reasons at waves 3 and 4, and 17 reasons at waves 5 and 6.

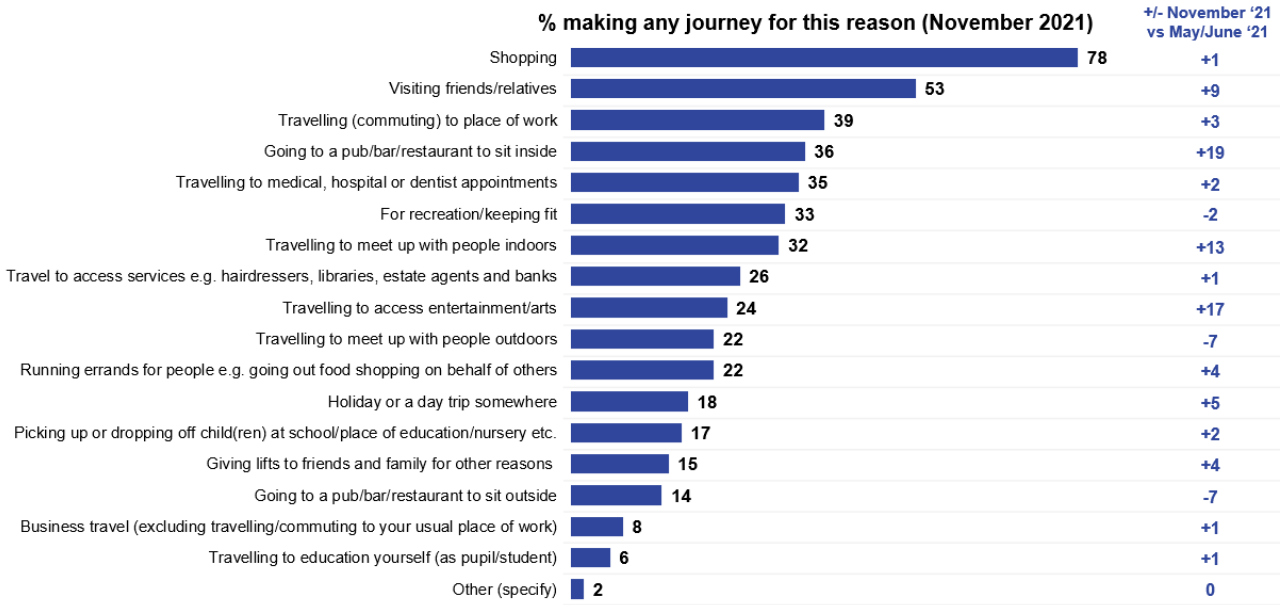
In November 2021, the average number of reasons selected was higher among women and younger adults aged 16-34-year-old (both 5.1), and those in employment (5.2) compared to men (4.6), older age groups - it was 4.8 among 35-54-year-olds and 4.6 among those aged 55-75-years old - and those who were not in employment (4.2).

Figure 7 shows the proportion of people who travelled (by any mode and at least once) for different reasons during November 2021, compared to May/June 2021. Travelling for shopping was the most common reason people travelled in November 2021; this was done by 78% of people, in line with the proportion in May/June 2021 (77%) and an increase from 72% in February/March 2021. The second most common reason why people made journeys in November 2021 was visiting friends and relatives; over half (53%) said they travelled for this reason.

Other common reasons people travelled in November 2021 were commuting to a place of work (39%), going to a pub/bar/restaurant to sit inside (36%), travelling to medical, hospital or dentist appointments (35%), for recreation and keeping fit (33%) and to meet up with people indoors (32%).

As shown in Figure 7, travelling for leisure reasons was a particularly important reason for the increase in the journey-making between May/June 2021 and November 2021. The proportion of those going to a pub/bar/restaurant to sit inside increased by 19 percentage points during this period while the proportion visiting to sit outside decreased by 7 points, likely due to the change in weather. Travelling to access entertainment and arts increased by 17 percentage points, travelling to meet up with people indoors by 13 percentage points and visiting friends and relatives by 9 percentage points. By contrast, commuting to a place of work increased by 3 percentage points from 36% in May/June 2021 to 39% in November 2021.

Figure 7: Reasons for travelling – November 2021 vs. May/June 2021



Source: Ipsos MORI/DfT; Base: All users of any transport mode at least once in the past four weeks (4,146) among 4,163 UK adults (Wave 6), 4-29 November 2021; 4,650 among 4,700 UK adults (Wave 5), 17 May-8 June; (3,299)

among 3,338 UK adults (Wave 4), 23 February-9 March; (3,139) among 3,178 UK adults (Wave 3), 27 November-7 December
Q2aNEW. Still thinking again about the last 4 weeks, for which of these reasons, if any, have you made a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.
Respondents were shown a list of 16 reasons at waves 4, and 17 reasons at waves 5 and 6.

3.2 Which modes did people use for different types of journey?

Commuting

There was a significant increase in the proportion of people who travelled to a place of work between February/March 2021 - a period of lockdown - and May/June 2021; from 26% to 36%. As restrictions eased in May/June 2021 and were lifted by November 2021, the proportion of people who travelled for this reason increased by 3 percentage points. In November 2021, a fifth of those in employment (20%) said they had not travelled to a place of work in the previous four weeks.

Older adults aged 55-75 years old who travelled to a place of work during November 2021 were more likely to have driven by car (69%) compared to those aged 16-34 (52%). The latter were more likely to travel to a place of work as a car passenger (19%) compared with 11% of 35-54-year-olds and 5% of 55-75-year-olds. This was also the case in terms of using app-based minicab services such as Uber; 6% of 16-34-year-olds who travelled to a place of work travelled this way, compared to 1% of those aged 35-54.

Almost a quarter, 24%, of the youngest age group (16-24-year-olds) who travelled to a place of work, travelled by bus compared to an average of 13% across older age groups. In November 2021, men were more likely to have travelled to work by train and underground or metro - 13% and 10% - compared to 7% and 6% of women. A higher proportion of women, 20%, walked all the way to a workplace; 13% of men travelled this way.

People living in Northern Ireland (87%) and Wales (68%) who travelled to a place of work were significantly more likely to travel to work by car as a driver compared to those living in England (59%) and Scotland (57%), as were people living in rural areas (76%) compared to those in urban areas (57%). Similarly, people from higher income households (earning over £40,000) were more likely to have driven to work in November 2021 than those from lower income households (earning up to £16,106); 65% against 49%.

Car use was lower among people from ethnic minority backgrounds; with 37% of those who travelled to a place of work during November 2021, travelling as a car driver, compared to 64% of those from other backgrounds. People from ethnic minority backgrounds were more likely to travel to a place of work using public transport modes; 30% travelled by bus services, 21% by train and 21% by underground or metro compared to 12%, 8% and 6% of those from other backgrounds. They were also more likely to use app-based minicab services or taxis.

Two-thirds, 66%, of those in employment who travelled to work during November 2021 said they used the same modes of transport as they had before the pandemic. Those aged

35-54 and 55-75 were more likely to have done this - 71% and 77% respectively - compared to 57% of those aged 16-34 years old. The younger age group (31%) were more likely to have said that they did not travel to work in November 2021 using the same modes of transport as before the pandemic compared to UK adults (23%). Across all age groups, those who had used public transport frequently before the pandemic (once a week or more often) were also more likely to have said they changed the mode they used (28% did this) as were those who cycled frequently (29%).

Qualitative research participants discussed the ways that habits had changed during the pandemic, as well as the ways in which some old habits had begun to reassert themselves. They explained how their choices were influenced by convenience, time savings, and the onset of winter. The survey found almost three in ten (29%) of those who travelled to work in November 2021 recalled that they avoided using public transport because of concerns about the Coronavirus and a similar proportion (28%) said they had avoided travelling on public transport at peak times because of concerns about the Coronavirus and other winter illnesses such as flu, coughs and colds.

Shopping

During November 2021, 58% of those who went shopping drove a car. This was twice the proportion who travelled as a car passenger (28%) while 32% of those who travelled for this reason, walked all the way to a destination and 13% travelled by bus.

Among those aged 55-75 who travelled to go shopping during November 2021, 68% drove a car for this reason, a higher proportion than the 59% of those aged 35-54 and 44% of those aged 16-34. When travelling for this reason, younger adults were more likely than older age groups to walk or wheel all the way to a destination (38%), to travel as a car passenger (35%), or by bus (17%).

People living in rural areas were more likely than those in urban areas to have driven by car to go shopping during November 2021 - 72% compared to 56% - and to travel as a car passenger - 35% compared to 26%. Conversely, those in urban areas were more likely to have travelled to go shopping by bus (15% compared to 4%) and to have walked all the way (36% compared to 17%). Those from ethnic minority backgrounds who travelled for shopping were more likely than average to have used public transport modes - 20% travelled by bus, 6% by train (5% travelled by app-based minicab services).

Visiting friends/relatives

Almost six in ten, 59%, of those who travelled to visit friends/relatives in November 2021 drove a car, 33% travelled as a car passenger and 19% walked all the way to a destination.

Those aged 55-75 years old who travelled for this reason were more likely than average to travel by car as a driver (66% did this) while 16-34-year-olds were significantly more likely to travel as a car passenger (39%), by public transport modes (14% travelled by train and 12% by bus) and by app-based minicab services (6%).

Those living in rural areas who travelled to visit friends/relatives were significantly more likely to have travelled by car as a driver (69%) compared to those living in urban areas (57%). Those from ethnic minority groups who travelled to visit friends/relatives were more likely than those from other backgrounds to have travelled by bus (26%), by train (18%), by underground or metro (9%) and app-based minicab services (7%).

Recreation and keeping fit

In line with May/June 2021, 56% of those who travelled for recreation and keep-fit purposes or to go to a place to walk/cycle, to a gym or to play sport, did this in November 2021 by walking all the way to a destination while 13% cycled. A third, 34%, drove a car and 15% travelled by as a car passenger.

Men (60%) and those living in urban areas (59%) who travelled for these reasons, were more likely than average to have walked or wheeled all the way. By contrast, older adults aged 55-75 years old were significantly more likely to have driven; 38% compared to 28% of those aged 16-34 years old. The younger age group was much more likely than older age groups to have used public transport modes – 10% travelled by bus for this reason, 6% by train and 5% by underground and metro. This was also the case for people from ethnic minority groups – 25% travelled by bus, 12% by train and 13% by underground or metro.

Travelling to medical, hospital and dentist appointments

Reflecting the roll-out of the vaccination programme, the proportion of people who reported travelling for a medical, hospital or dentist appointment increased from 23% in November/December 2020 to 30% in February/March 2021, 33% in May/June 2021 and 35% in November 2021.

Just under half, 49%, of those who travelled for a medical, hospital or dentist appointment during November 2021 did so by driving a car, while 22% travelled as a car passenger. Across the UK, 12% made these journeys by bus and 18% walked or wheeled all the way but those living in urban areas were more likely than those in rural areas to have walked (19%) or travelled by bus (14%).

Driving to an appointment by car was the preferred mode for 53% of older people aged 55-75, 64% of people living in Wales, 61% of people living in Northern Ireland, and 65% of those living in rural areas. Younger adults aged 16-34 years old who travelled for this reason were significantly more likely to have travelled as a car passenger - 29% compared to 18% of those aged 55-75 - or to have travelled by app-based minicab services such as Uber - 6% compared to less than 1% of the older age group.

People from ethnic minority backgrounds who travelled to an appointment during November 2021 were significantly less likely than other groups to have driven by car (33%), but more likely than average to have travelled by public transport - 27% travelled by bus and 9% by underground or metro - and to have used taxis or app-based minicab services.

3.3 Journey purpose, modes and how these changed

The *All Change?* series of surveys has captured people's reasons for travelling in each wave since November/December 2020 (wave 3) and the mode they used to make different types of journeys. For comparison, the final survey also asked people why and how they travelled before the pandemic, during January-March 2020.

Eight in ten, 81%, said they travelled to go shopping before the beginning of pandemic. Shopping remained the most common reason why people made journeys during the pandemic but the proportion who travelled for this reason was lower during the two periods of lockdown (waves 3 and 4 - November/December 2020 and February/March 2021) - down to 74% and 72% respectively. Higher proportions - 77% and 78% - travelled for this reason during May/June 2021 and November 2021.

The proportion of people who reported travelling to visit friends or relatives changed substantially according to the restrictions in place; 19% travelled for this reason in November/December 2020 and 13% February/March 2021 but this increased to 44% in May/June 2021 and 53% in November 2021. It was the second most common reason people travelled during May/June 2021 and November 2021 but was much lower than the pre-pandemic period when two-thirds (66%) travelled for this reason.

While half, 51%, of people recalled travelling to a place of work at least once before the pandemic, the incidence fell to a range between 26% in November/December 2020 and 39% during November 2021. Similarly, almost half (46%) of the UK public made journeys to access medical, hospital or dentist appointments before the pandemic, double the proportion who said they travelled for this reason during lockdown in November/December 2020 (23%). Reflecting the roll-out of the vaccination programme, the proportion of people travelling for this reason subsequently increased to 30% in February/March 2021, 33% in May/June 2021 and 35% in November 2021.

As Table 4 shows, compared to November 2021, higher proportions of people made journeys to go on holiday or day trips before the pandemic, to access medical appointments and services such as hairdressers, libraries, etc., to commute and for leisure purposes.

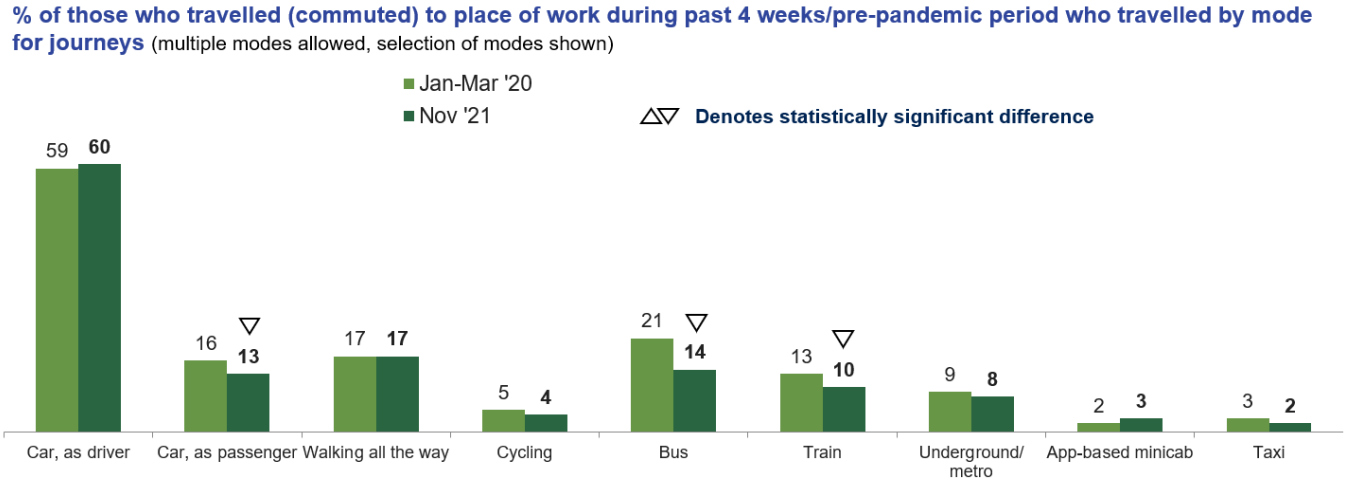
Table 4: % travelled for each journey purpose during January-March 2020 and November 2021

Journey purpose	January-March 2020*	November 2021	± Difference
Shopping	81	78	-3
Visiting friends/relatives	66	53	-13
Going to a pub/bar/restaurant to sit inside/outside	48	41	-7
Travelling to meet up with people indoors/outdoors	46	41	-5
Travelling (commuting) to place of work	51	39	-12
Travelling to medical, hospital or dentist appointments	46	35	-11
For recreation/keeping fit	34	33	-1
Travel to access services e.g. hairdressers, libraries, estate agents and banks	40	26	-14
Travelling to access entertainment/arts	36	24	-12
Running errands for people e.g. going out food shopping on behalf of others	21	22	+1
Holiday or a day trip somewhere	37	18	-19
Picking up or dropping off child(ren) at school/place of education/nursery etc.	16	17	+1
Giving lifts to friends and family for other reasons	21	15	-6
Business travel (excluding travelling/commuting to your usual place of work)	13	8	-5
Travelling to education yourself (as pupil/student)	9	6	-3
Other	1	2	+1

Source: Ipsos MORI/DfT; Base: All users of any transport mode at least once in the past four weeks (4,146) among 4,163 UK adults (Wave 6), 4-29 November 2021
Q2aNEW. Still thinking again about the last 4 weeks, for which of these reasons, if any, have you made a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.
* January-March 2020 recall from Wave 6 survey; Q2cNEW. Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, for which of these reasons, if any, did you make a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.

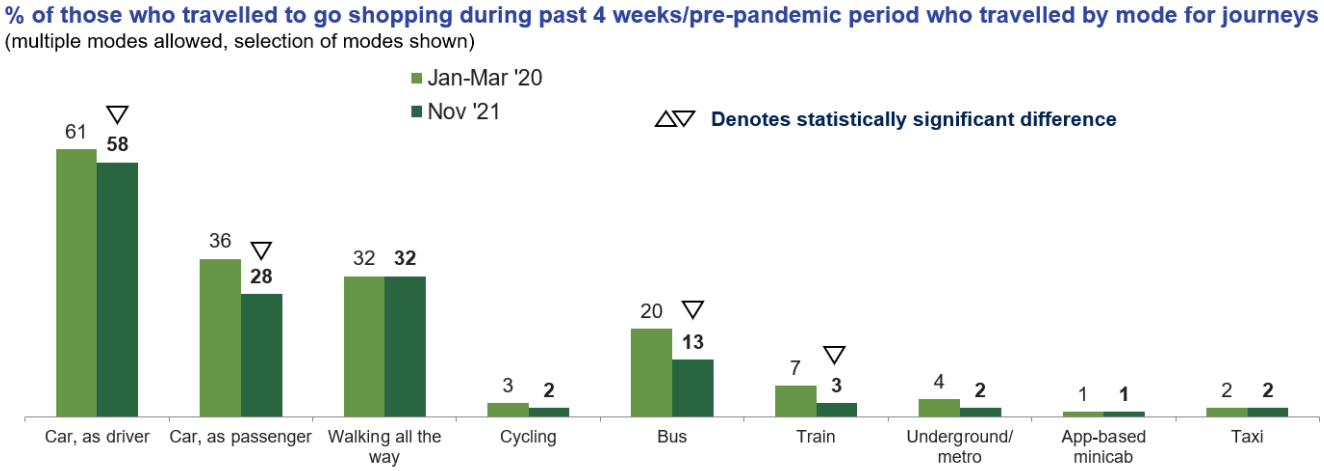
Figures 8-10 compare the modes used by people who made three types of journey during the period immediately before the pandemic and in November 2021. They show that smaller proportions of people made journeys by bus, by train and travelled as a car passenger in November 2021. The share accounted for by walking remained relatively constant and travelling by car as a driver remained the most commonly used mode for each journey purpose.

Figure 8: Modes used for travelling to a place of work - January-March 2020, and November 2021



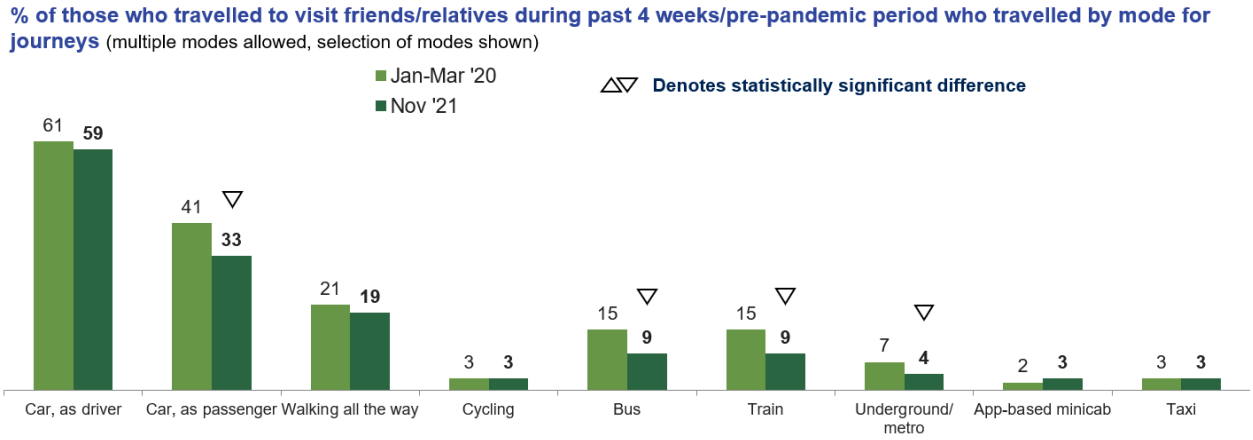
Source: Ipsos MORI/DfT; Base: 1,422 (past 4 weeks/W6) and 2,000 (pre-pandemic) travelled to place of work among 4,163 UK adults (Wave 6), 4-29 November 2021
Q2bNEW. Still thinking about the last 4 weeks, which, if any, of these modes of transport did you use when…? Please indicate all that apply.
Q2dNEW. Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, which, if any, of these modes of transport did you use when…?

Figure 9: Modes used for travelling to go shopping - January-March 2020, and November 2021



Source: Ipsos MORI/DfT; Base: 3,324 (past 4 weeks/W6) and 3,566 (pre-pandemic) travelled to go shopping among 4,163 UK adults (Wave 6), 4-29 November 2021
W6Q2bNEW. Still thinking about the last 4 weeks, which, if any, of these modes of transport did you use when…? Please indicate all that apply.
W6Q2dNEW. Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, which, if any, of these modes of transport did you use when…?

Figure 10: Modes used for travelling to visit friends/relatives - January-March 2020, and November 2021



Source: Ipsos MORI/DfT; Base: 2,233 (past 4 weeks/W6) and 2,906 (pre-pandemic) visited friends/relatives among 4,163 UK adults (Wave 6), 4-29 November 2021
W6Q2bNEW. Still thinking about the last 4 weeks, which, if any, of these modes of transport did you use when…? Please indicate all that apply.
W6Q2dNEW. Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, which, if any, of these modes of transport did you use when…?

3.4 Working from home and commuting

During November 2021, advice to work from home where possible remained in place in Scotland and Wales and on 19 November Northern Ireland's Health minister advised working from home. In England, advice to work from home had ended with the completion of Step 4 of the Roadmap and when reporting on wave 5 of *All change?,* we anticipated that autumn 2021 would be a pivotal period as restrictions were eased, and people and employers developed 'return' routines and policies.

During November 2021, half of adults in the UK were in paid employment three days a week or more while 14% worked less frequently than this, and a third (34%) said they did not work at all. The majority, 51%, of those in employment worked from home - introduced to respondents as 'doing paid employment from where you live' - at least once in November 2021. This was an increase of 10 percentage points compared to the period immediately before the pandemic (41%). Over the same period, there was a doubling in the proportion of those in employment who worked from home 5 days a week - this increased from 8% before the pandemic to 17% in November 2021 – and a trebling of the proportion who worked from home 3-4 days a week over the same period (from 5% to 14%).

Those who travelled to a workplace by train immediately before the pandemic were more likely to work from home during November 2021 compared to those made this type of journey by bus or car - 65% did this at least once, compared to 47% of those who travelled by bus and 42% who travelled by car. They were also more likely to have worked at home 3 or more days a week during November 2021; 42% compared to 26% of those who travelled by bus, 25% of those who travelled by car.

The corollary to the increase in working at home was a significant fall in the proportion who travelled to a place of work between the period immediately before the pandemic and May/June 2021, shown in Table 5 below. Between May/June 2021 and November 2021, however, there was a modest increase in the proportion of those in employment travelling to a place of work at least once, from 71% in May/June 2021 to 78% in November 2021, and an even smaller increase in the proportion travelling to work 5 days a week or more often (from 28% to 32%). The profile of those travelling to work less frequently than 5 days a week remained largely in line with that of May/June 2021.

During May/June and November 2021, people travelled to a place of work much less frequently than they had done before the pandemic. The occasional nature of travelling to a place of work was also evident in comparisons of the number of days people were working per week and how often they travelled to a place of work. For example, 53% of those who worked 5 days a week or more often, travelled to a place of work this frequently meaning that 47% did not, including 19% who never did this during November 2021. Among the smaller group who worked 3-4 days a week, 65% travelled to a place of work this frequently, 35% did not, including 13% who never did this.

Table 5: Frequency of travelling to a workplace in the previous 4 weeks among those in employment – January-March 2020, May/June 2021 and November 2021

	January-March 2020*	May/June 2021	November 2021
5 days a week or more	47	28	32
3-4 days a week	20	19	19
2 days a week	8	9	11
About once a week	6	7	8
About twice	2	4	4
About once	2	5	5
(Less often)	2	n/a	n/a
Never	11	27	20
Don't know	2	2	2

Source: Ipsos MORI/DfT; Base: 2,427 UK adults in employment (Wave 6), 4-29 November 2021, 2,582 (Wave 5), 17 May-8 June 2021

* Asked at Wave 6; Q63aNEW (Wave 6) How often, if at all, did you typically do each of the following during the period immediately before the first UK-wide 'lockdown', that is the period between 1st January 2020 and 23rd March 2020? Travel to a place of work

Q63bNEW. (Wave 5 and Wave 6) How often, if at all, did you typically do each of the following during the last 4 weeks?

Patterns in the frequency of travelling to a place of work during November 2021 contrast with those before the pandemic; for example, while 53% of those who worked 5 days a week or more often travelled to a place of work this frequently, the equivalent was 83% before the pandemic.

There was also little change in the average number of modes used in November 2021 compared to the period immediately before the pandemic. More than nine in ten, 93%, of those who travelled to a workplace by car prior to the pandemic and then travelled for this reason during November 2021, did so by driving a car too. This repeated mode use was also the case for six in ten (61%) who travelled to a workplace by bus and a similar proportion of those who travelled for this reason by train (63%).

Qualitative research highlighted people's continued preference for hybrid working to remain in place. Participants described how much they appreciated - and made use of - their new-found extra time and reflected on the greater sense of flexibility that they felt when having the option to have a mix of working from home and commuting into work across the week. The new balance between home-working and travelling to a workplace provided some form of routine and opportunity for interaction with colleagues while enabling increased productivity given the time saved by not commuting.

As Table 6 shows, *All change?* surveys showed an increase during the pandemic in the proportion who strongly agreed and a decrease in those who strongly disagreed that they 'could do all my work from home just as easily as I could at my place of work before the pandemic' (although don't knows also increased). Qualitative research participants expected employers to compromise; in essence, to allow what has worked so far to continue in some form.

Table 6: Agreement/disagreement that 'I can do all my work from home just as easily as I could at my place of work before the pandemic' among those in employment – April/May 2020, May/June 2021 and November 2021

	April/May 2020	May/June 2021	November 2021
Strongly agree	16	18	20
Tend to agree	17	17	17
Neither agree nor disagree	8	10	9
Tend to disagree	15	13	11
Strongly disagree	33	29	25
Don't know/not applicable	11	13	17

Source: Ipsos MORI/DfT; Base: 2,427 UK adults in employment (Wave 6), 4-29 November 2021, 2,582 (Wave 5), 17 May-8 June 2021, 2,613 (Wave 1), 15-22 May 2020 (28 May-4 June in Wales)
Q24AMENDED To what extent do you agree or disagree with each of the following statements? - I can do all my work from home just as easily as I could at my place of work before the pandemic

3.5 Shopping

Online shopping was more common during November 2021 compared to the pre-pandemic period (January-March 2020). Almost half (48%) of people shopped online to purchase products at least once a week in November 2021 compared to around one third (35%) pre-pandemic. Despite this, the small proportion who had not shopped online at all

in November 2021 was almost twice as many that had not shopped online immediately before the pandemic in January-March 2020 (11% compared to 6%).

Women (52%) were more likely than men (45%) to have shopped online to purchase products weekly or more often in November 2021, while 16-34-year-olds (53%) and 35-54-year-olds (52%) were more likely than those aged 55-75 (39%) to have shopped online weekly or more often. Those in higher income households of £40,000+ tended to shop online more often than those in lower income households of up to £16,106 (55% compared with 41%).

The proportion of people using home delivery for supermarket shopping was also higher in November compared with the pre-pandemic period (January-March 2020), though the increase between the two periods was smaller than for online shopping. Around one quarter (23%) used home delivery for supermarket shopping in November 2021 compared with 17% in the period before the pandemic. Demographic variation followed similar patterns for supermarket home delivery as for online shopping, with adults aged 16-34 and higher income households of £40,000+ among those more likely than average to use supermarket shopping weekly.

While online shopping was done more frequently in the past four weeks compared to pre-pandemic, people broadly expected to return to their pre-pandemic behaviour in January-March 2022 – for example, 40% of people expected to shop online about once a week or more often in the first few months of 2022 while 35% recalled doing this before the pandemic, much lower than the 47% during November 2021.

The frequency of anticipated use of home delivery for supermarket shopping in early 2022 very closely matched the frequency of this in November 2021; 22% of people expected to shop online about once a week or more often in the first few months of 2022, in line with the 23% who did this in November 2021, both higher than the 17% who recalled doing this immediately before the pandemic.

While there were differences in past and anticipated behaviour by gender, age and income with regard to online shopping, there was very little variation in terms of shopping locally. Men and women were just as likely as each other to have shopped locally at least once a week (both 69%), while there were no significant differences by age with the exception of those aged 16-24 who were less likely to have shopped close to home than average (59% compared to 69%). Household income made no difference to people's propensity to shop close to home in November 2021.

In November 2021, the pattern of shopping close to home - defined to respondents as "within 15-20 minutes' walk of where you live" - was similar to that in the period immediately before the pandemic. Two-thirds of people, 69%, shopped close to home about once a week or more often, compared to the 70% who did so before the pandemic. The frequency of shopping close to home was also similar. For example, the proportions shopping close to home 5 days a week or more pre-pandemic and in November 2021

were 5% and 4% respectively, and the same proportion shopped close to home 3-4 days a week in both periods (both 13%).

Two-thirds of people, 67%, expected to shop close to home about once a week or more often in the first few months of 2022, similar to the 69% who did this in November 2021 and 70% immediately before the pandemic.

4 Did people change the modes they used?

As in previous *All change?* reports, this section uses analysis to allow us to look at behaviour change at an individual level as well as an aggregate level. It shows us how often people used different modes of travel in November 2021 compared to January-March 2020, the period immediately before the pandemic.

Firstly, we analyse the extent to which people changed their frequency of using transport modes in November 2021 compared with January-March 2020 (section 4.1). Then we look at how increases or decreases in the use of one mode, impacts the use of other transport modes over the same period (section 4.2).

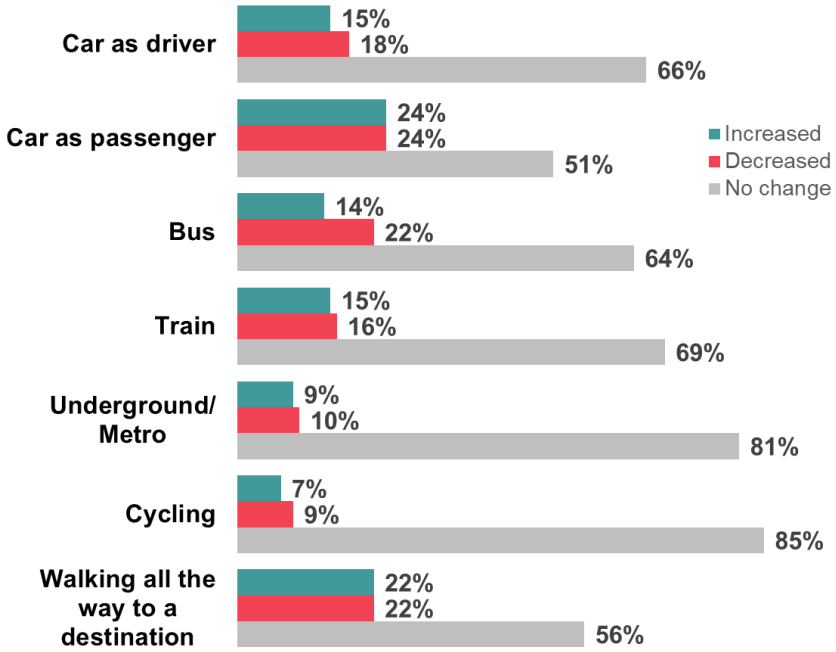
We also explore the extent to which people stopped or started using particular modes in November 2021 compared to the period before the pandemic (section 4.3) and analyse whether people recall changing their travel behaviour during the pandemic (section 4.4), profiling those who said they changed behaviour, and using qualitative research to examine how behaviour changed. Additional analysis of the frequency of using transport modes in November 2021 compared to May/June 2021 is available in Appendix D, but our focus here is change relative to the pre-pandemic period.

4.1 How did the frequency of using transport modes in November 2021 compare to January-March 2020?

Figure 12 shows analysis based on responses given by 4,163 wave 6 survey respondents about their frequency of travel by different modes in November 2021 and before the pandemic (in January-March 2020). Analysis is based on recall of pre-pandemic behaviour collected in November 2021 (the wave 6 survey) rather than April/May 2020 (the wave 1 survey). While not longitudinal, this analysis is more robust because it involves a larger sample size of 4,163 (this approach was informed by analysis of differences in recall between waves 1 and wave 6 which found considerable similarity in patterns of recall over time).

Figure 12 shows that while a majority did *not* change how often they travelled by different modes, the largest changes in frequency of use were for car passenger travel and walking all the way to a destination. Further analysis, summarised below, shows how the frequency of use of different modes changed for different population subgroups.

Figure 12: Changes in travel frequency for selected modes between January-March 2020 and November 2021



Source: Ipsos MORI/DfT; Base: 4,163 UK adults who participated in Wave 6 (4-29 November 2021)

Travel by car

Figure 12 shows that two-thirds of people (66%) drove a car in November 2021 as often as they did during the period immediately before the pandemic, however, 18% drove less frequently in November 2021 and 15% drove more frequently.

Young people were more likely than other age groups to have driven a car more frequently in November 2021 than before the pandemic; one in five, 19%, compared to 15% among all age groups. Conversely, older age groups, were more likely to be driving less frequently in November 2021; with 22% of 55-75-year-olds driving less frequently. People in employment were more likely to have increased driving in November 2021 compared to those who were not in employment - 18% compared with 12% - while those who commuted 3-5 days per week before the pandemic were more likely than average to have driven less frequently (20% compared with 18%).

A higher proportion of people changed the frequency they travelled as a car passenger in November 2021 compared to before the pandemic. While there was no change in frequency for just over half (51%), this increased for 24% and decreased for 24%.

Women were more likely than men to have travelled as a car passenger less often (26% compared to 22%) while younger people were more likely than other age groups to have increased how frequently they did this; a third (34%) of 16-34-year-olds compared with 24% overall.

Those living in London (31%) and from ethnic minority backgrounds (33%) were more likely than average to have travelled as a car passenger more frequently compared to before the pandemic while the opposite was true for those in employment and those from

higher social grade households; 26% and 27% respectively decreased how frequently they travelled this way. Those who commuted 1-2 days prior to the pandemic were more likely to have increased the frequency they travelled as a car passenger (33%) compared to those who commuted 3-5 days per week (23%).

Public transport

As shown in Figure 12, most people travelled as frequently on public transport modes in November 2021 as they did immediately before the pandemic – there was 'no change' for 64% of people in terms of travelling by bus, 69% for train travel and 81% for travel by underground/metro. However, while just over one in five individuals travelled by bus less frequently in November 2021 compared to before the pandemic (22%), a smaller proportion travelled less frequently by train (16%) and by underground/metro (10%).

Younger age groups were more likely to have changed their frequency of train travel in November 2021 compared with the period before the pandemic. Just over one in five (22%) 16-34-year-olds travelled by train more frequently (compared with 15% of all age groups) while this decreased for 21%.

People in employment (17%) were more likely to have travelled by train more frequently than those not in employment (12%). Although equal proportions of people in employment (18%) and those not in work (18%) had reduced train travel in November 2021.

Those from ethnic minority backgrounds were more likely to have changed their frequency of train travel, with 22% increasing use (compared to 14% of other groups) and 26% reducing train use (compared with 14% of other groups). People living in London were most likely to have travelled by train less frequently in November 2021 than they had prior to the pandemic - 34% compared with 16% across the UK - but it was also the case that 23% of Londoners had increased their frequency of train travel.

The decline in the frequency of travelling by bus was more evident among people in London (36%) and younger people - 29% of 16-34-year-olds used the bus less frequently in November 2021 (compared to 22% among all age groups). The frequency of bus travel increased among 28% of people from ethnic minority backgrounds but it also decreased among 27% of this group.

Active travel

While a fifth (22%) walked/wheeled all the way to a destination more frequently in November 2021 than before the pandemic, a further 22% reduced their frequency of walking over the same period. While 7% cycled more frequently in November 2021 then they had done before the pandemic, frequency decreased for 9%.

Younger age groups were most likely to have changed the frequency they walked/wheeled to a destination. The frequency of walking increased for three in ten 16-24-year-olds (29%) and decreased for a quarter (25%). Similarly, this age group exhibited more change in cycling; 10% increased how frequently they travelled this way and 12% did this less frequently compared to the period before the pandemic.

Those from an ethnic minority background were more likely than other groups to have walked/wheeled all the way to a destination less frequently in November 2021 (27% compared with 21%) and to have cycled less frequently - 13% - but the frequency of cycling increased for 11% of those from an ethnic minority background.

People in employment were more likely than those not in work to change their frequency of cycling; 10% increased while 8% decreased the frequency they cycled. People in London were more likely to have increased their frequency of cycling (10%) compared to 7% overall.

4.2 Did changes to the frequency of using one mode affect other modes?

Previous waves of *All change?* have 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; there was limited evidence suggesting switching between modes. *All change?* surveys cannot tell us definitively if people have switched - for that we would need detailed studies of individual journeys over time - but we can glean some useful indications of behaviour by comparing survey responses at an individual level, rather than aggregate level.

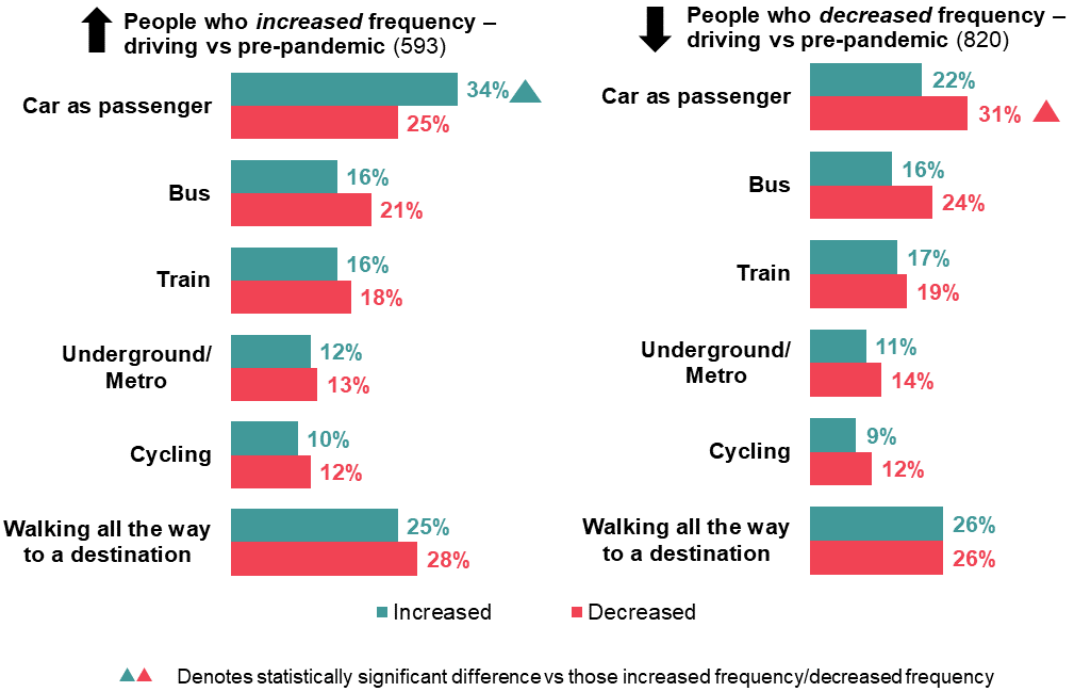
This section uses a similar approach to previous *All change?* reports, comparing changes in the frequency of using modes among those who have increased/decreased their frequency of using a particular mode.

Figure 13 shows that people who drove a car more frequently in November 2021 compared to the period immediately before the pandemic, were also more likely to have increased their car passenger travel over the period. People who had decreased their frequency of driving were also more likely to have decreased car passenger travel.

Figure 14 summarises changes in the frequency of bus travel between November 2021 and prior to the pandemic. It shows that people that increased their bus use were also more likely to increase their use of other modes over the period, with the exception of car driving. Conversely, people that reduced how often they travelled by bus were more likely to have also decreased their frequency of car passenger travel, train, underground and metro use.

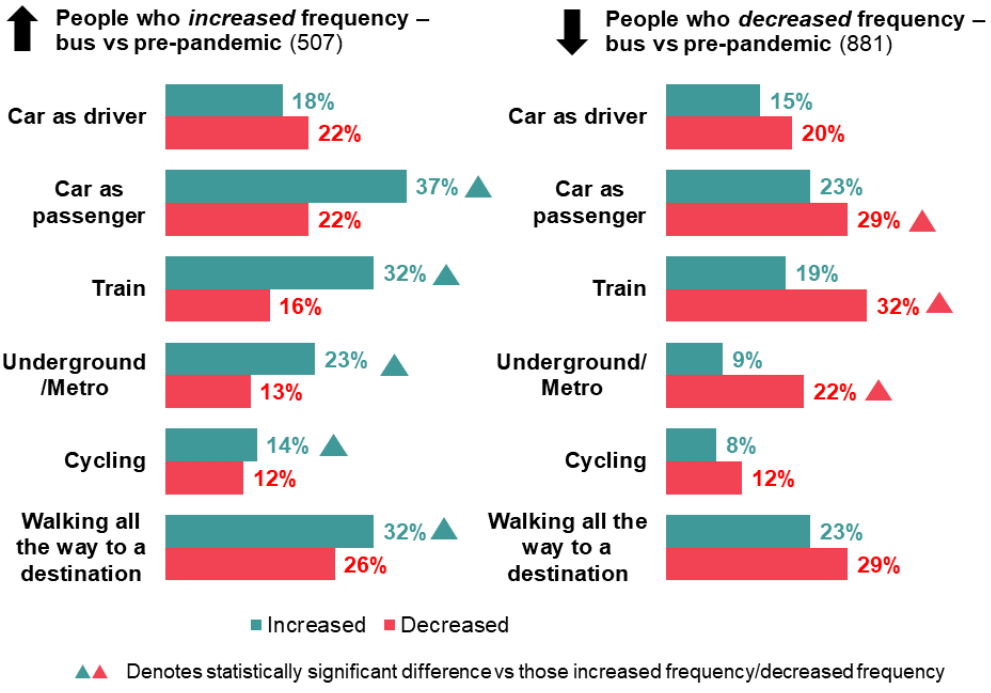
Figure 15 shows changes in travel behaviour for those who either increased or decreased the amount they travelled by train in November 2021 compared with before the pandemic. Those who increased the frequency they travelled by train were also significantly more likely to have increased how often they travelled by bus and underground/metro, while those who decreased the frequency they travelled by train were more likely to have also decreased how often they travelled by underground/metro.

Figure 13: Mode increase/decrease among those who increased/decreased driving in a car – November 2021 vs. January-March 2020



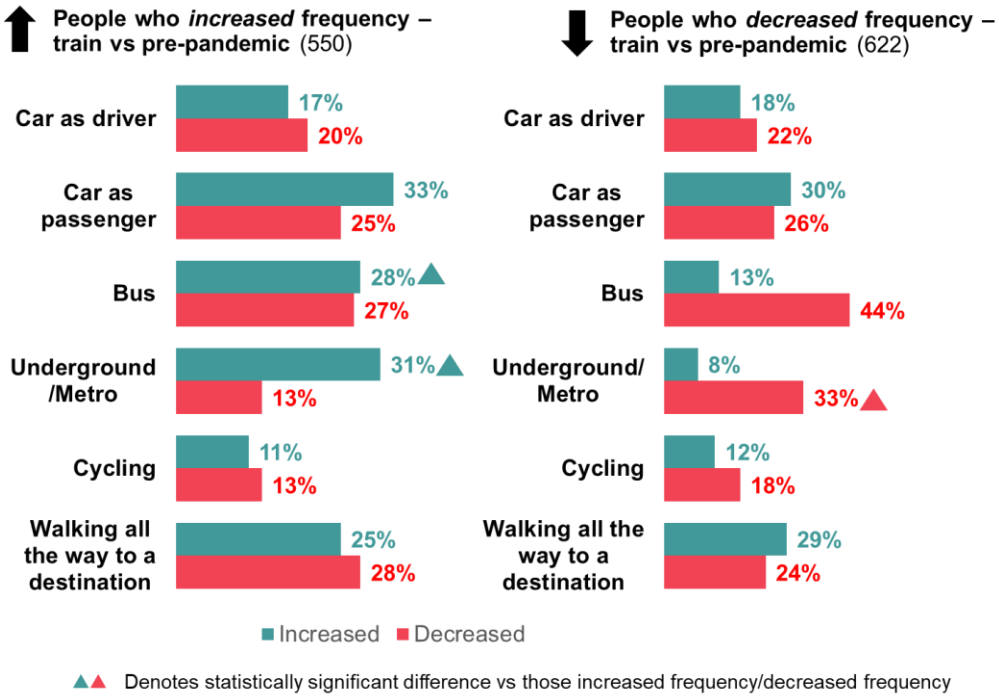
Source: Ipsos MORI/DfT; Base: 4,163 UK adults who participated in Wave 6 (4-29 November 2021)

Figure 14: Mode increase/decrease among those who increased/decreased bus use – November 2021 vs. January-March 2020



Source: Ipsos MORI/DfT; Base: 4,163 UK adults who participated in Wave 6 (4-29 November 2021)

Figure 15: Mode increase/decrease among those who increased/decreased train use – November 2021 vs. January-March 2020

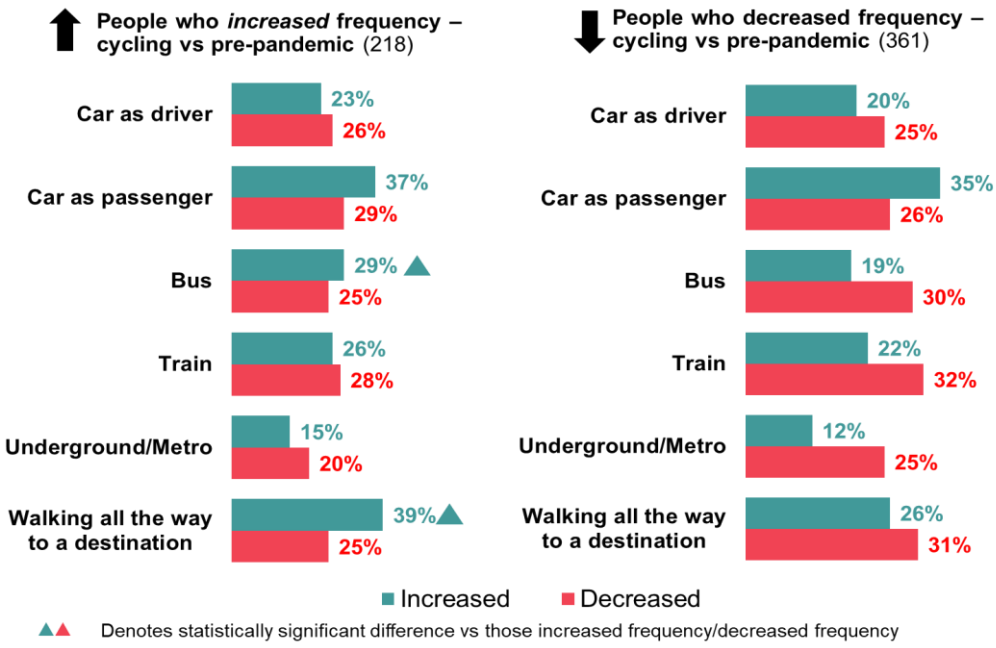


Source: Ipsos MORI/DfT; Base: 4,163 UK adults who participated in Wave 6 (4-29 November 2021)

As shown in Figure 16, those who cycled more often in November 2021 compared to before the pandemic also travelled more frequently by bus and by walking all the way to a destination.

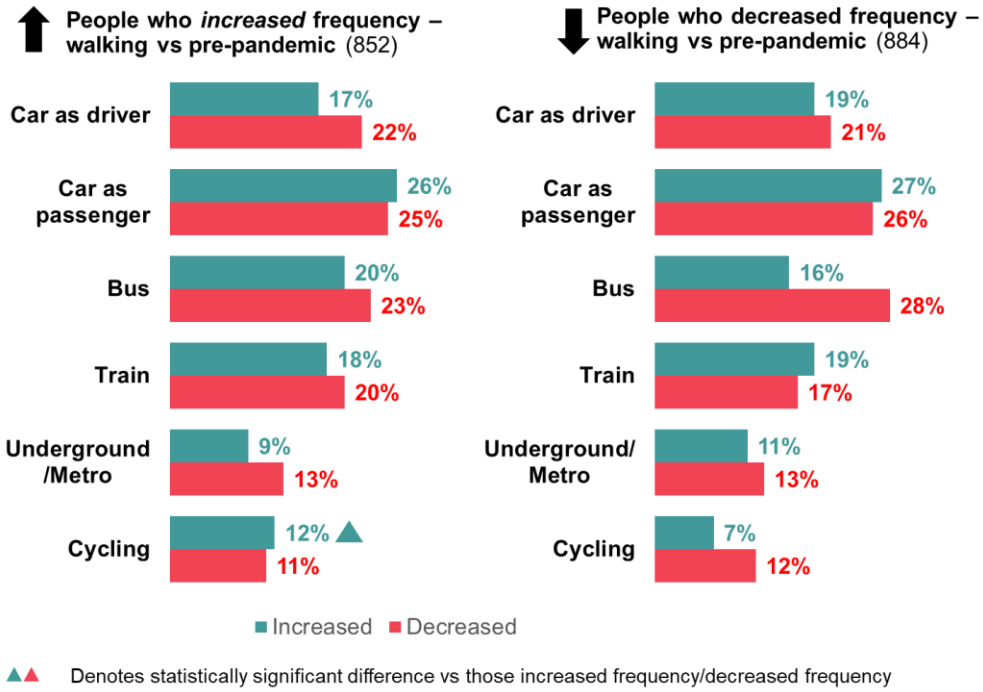
Figure 17 shows that people who increased how frequently they walked/wheeled all the way to a destination were also more likely to have increased how often they cycled.

Figure 16: Mode increase/decrease among those who increased/decreased cycling to a destination – November 2021 vs. January-March 2020



Source: Ipsos MORI/DfT; Base: 4,163 UK adults who participated in Wave 6 (4-29 November 2021)

Figure 17: Mode increase/decrease among those who increased/decreased walking to a destination – November 2021 vs. January-March 2020



Source: Ipsos MORI/DfT; Base: 4,163 UK adults who participated in Wave 6 (4-29 November 2021)

4.3 Did people stop/start using modes in November 2021 compared with January-March 2020?

Section 4.2 described changes in the frequency people used specific modes, comparing November 2021 with the period immediately before the pandemic. Section 4.3 does something else, investigating whether people stopped or started using six transport modes between the pre-pandemic period and November 2021, focusing on particular journeys made for six specific purposes.

Table 16 summarises analysis of the proportion of people in November 2021 who made journeys for six particular reasons, who had either stopped using a specific mode they had used to make journeys before the pandemic, or who had started using a new mode in November 2021. Taking travel to a workplace as an example, 'Stopped' denotes respondents selected a mode they used to travel to a workplace before the pandemic but did not select this mode as one used to make this journey in November 2021 (see base of Table 16 for details of questions). 'Started' was derived from the opposite behaviour. In this example, 2% of those who travelled to a workplace as a car driver immediately before the pandemic stopped using this mode when making this type of journey during November 2021.

The analysis shows that relatively few people stopped or started using modes for specific journey purposes in November 2021 compared to before the pandemic. The most substantial change occurred in terms of shopping; 6% stopped walking when travelling for this reason and 6% started, while 7% stopped travelling by bus for shopping and 2% started.

Table 16: % UK adults who stopped/started using each mode (comparing January-March 2020 with November 2021), for each journey purpose

Transport mode	Travel to a workplace		Shopping		Visiting friends	
	Stopped	Started	Stopped	Started	Stopped	Started
Driving a car	2	2	5	2	4	2
Bus	3	1	7	2	4	1
Train	1	1	3	1	4	1
Underground/ metro	1	1	3	*	2	1
Cycle	1	*	1	1	1	1
Walk/wheel	2	2	6	6	4	3

Transport mode	A medical appointment		Recreation/ keep-fit		Dropping off/picking up kids from school	
	Stopped	Started	Stopped	Started	Stopped	Started
Driving a car	3	1	3	1	*	1
Bus	3	1	1	1	*	0
Train	1	*	1	*	*	*
Underground/ metro	1	*	1	*	*	*
Cycle	*	*	1	1	0	*
Walk/wheel	3	1	2	2	1	*

Note: An asterisk (*) denotes a percentage greater than 0% but less than 0.5%

Source: Ipsos MORI/DfT; Base: all making each type of journey between 1 January-23 March 2020 and also the last 4 weeks (November 2021) - travel to a workplace (1,264), shopping (3,076), visiting friends and relatives (1,993), a medical appointment (921), recreation/keep-fit (986), dropping off/picking up kids from school (498) - among 4,163 UK adults, 4-29 November 2021 (Wave 6). Percentages shown above are based on all respondents, but confidence intervals are based on the samples making each type of journey and the associated percentages; these range from +0.4 to 2.2.

Q2aNEW. Still thinking again about the last 4 weeks, for which of these reasons, if any, have you made a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.

Q2cNEW. Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, for which of these reasons, if any, did you make a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.

The analysis described above looked at the extent to which people stopped or started using modes for particular journeys and analyses these in isolation. Further analysis, shown in Table 17, assessed whether people started or stopped using particular modes for any of the six journey purposes. It shows that larger proportions of people either stopped or started using some modes for *any* of the six journey purposes. For example, 13% stopped travelling by car as a driver for at least one of the six journey purposes while 6% started travelling this way for at least one type of journey.

Table 17: % who used each mode for one or more of six journey purposes during January-March 2020 and November 2021 who either stopped or started using each mode for *any* journey purpose

	Stopped	Started
Driving a car	13	6
Bus	13	4
Train	8	3
Underground/metro	5	2
Cycle	3	2
Walk/wheel	14	12

Note: Includes respondents who started and stopped using a mode for different journey types
Source: Ipsos MORI/DfT; Base: all using each mode for any of the six journey purposes between 1 January-23 March 2020 or the last 4 weeks (November 2021) - driving a car (2,595), bus (989), train (585), underground/metro (264), cycle (279), walk/wheel all the way to a destination (1,668) - (among 4,163 UK adults, 4-29 November 2021 (Wave 6)). Percentages shown above are based on all respondents, but confidence intervals are based on the samples using each mode and the associated percentages; these range from +1.2 to 6.0.
Q2aNEW. Still thinking again about the last 4 weeks, for which of these reasons, if any, have you made a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.
Q2cNEW. Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, for which of these reasons, if any, did you make a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.

Table 18 shows the proportion of people - 46% - that either stopped or started using *any* of the six modes for *any* of the six journey purposes between the pre-pandemic period and November 2021. This analysis does not tell us definitively about mode switching but shows a substantial degree of behaviour-change between the period immediately before the pandemic and November 2021. It also highlights that the proportion who stopped travelling by at least one mode and did not start using another, 22%, was higher than the proportion who started but did not stop using a mode(s), 9%, and the 15% that started *and* stopped using a mode(s).

Table 18: % UK adults who stopped/started using *any* mode (comparing November 2021 with January-March 2020) for *any* of six journey purposes

Behaviour	%	Behaviour	%
Started and/or stopped	46	Started but did not stop	9
Didn't start or stop	55	Stopped but did not start	22
		Started and stopped	15

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6)
Q2aNEW. Still thinking again about the last 4 weeks, for which of these reasons, if any, have you made a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.
Q2cNEW. Still thinking about the period immediately before the first UK 'lockdown', that is the period between 1st January and 23rd March 2020, for which of these reasons, if any, did you make a journey of any kind. It does not matter which mode(s) of transport you used. Please indicate all that apply.

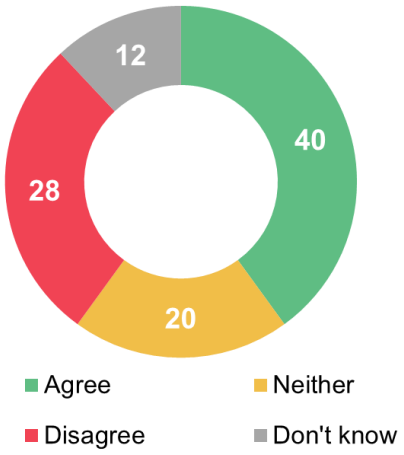
Women were more likely than men to have stopped and/or started using a mode(s) across these journey purposes - 50% compared to 42%. While 36% of 16-24-year-olds stopped and/or started using a mode(s) across these journey purposes, the equivalent proportion was 51% among those aged 25-34. The proportion of those who started and/or stopped using a mode(s) was highest in Scotland and London (both 50%) and lowest in Wales and the East of England (both 40%). People living in urban areas were much more likely to

have started or stopped using a mode(s) compared to those in rural areas; 48% compared to 36%.

4.4 Do people recall changing behaviour?

Another way of measuring changes in behaviour is to ask respondents. This differs from the measurements described previously which allow us to derive behaviour-change. It is subject to respondents' judgements as well as recall; where Tables 16-18 present the prevalence of people who stopped or started to make a journey using a mode(s), the survey question shown in Figure 18 will include people's interpretation of the term 'change' (as such, this measurement may well have picked up different types of change although respondents may have ruled out some behaviour as change because it was one-off or occasional). Four in ten (40%) agreed that they had changed the way they made some journeys in the previous four weeks compared to before the pandemic.[8]

Figure 18: % agree/disagree "I have changed the way I have made some journeys compared to before the pandemic, using different modes of transport"



Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6)
Q68NEW. Again, thinking about your travel in the last 4 weeks, to what extent do you agree or disagree with each of the following? Please indicate if the statement is not applicable.

Women were significantly more likely than men to agree that they had changed the way they made some journeys compared to before the pandemic (43% compared to 37%) as were younger age groups with 47% of 16-34-year-olds agreeing compared with 39% of 35-54-year-olds and 35% of 55-75-year-olds. People in urban areas were also more likely to have said they changed the way they travelled compared to those in rural areas (41% compared to 33%.)

Those who changed the way they made some journeys in the previous four weeks compared to before the pandemic, were more likely to report walking or cycling for pleasure, exercise or essential journeys. Their use of public transport was more mixed

[8] Among this group, 43% did not start and/or stop using a mode(s) across these journey purposes potentially reflecting the difference between these measures of behaviour and the ways in which respondents have interpreted key terms such as 'change' and 'some'.

though – some said they travelled by public transport less often in November 2021 compared to before the pandemic while others used it more often:

- 74% reported walking or cycling for pleasure/exercise during November 2021 (compared with 54% of those who said they had not changed the way they made some journeys compared with before the pandemic)
- 64% reported walking or cycling for essential journeys (compared with 38%)
- 52% said they had travelled a lot or a little *less often* by bus (compared with 23%)
- 51% travelled a lot or a little *less* often by train (compared with 22%)
- 13% said that they travelled a lot or a little *more* by bus during November 2021 (compared with 5%).

Qualitative research participants described major changes to their travel modes while others told us that changes had been more subtle and marginal. Participants told us how their own unique personal and working circumstances influenced their changing travel patterns. Personal changes included differences in transport modes for leisure travel and commuting, journey times, childcare duties, working from home on different days to previously, commuting at different times/on different days, and mixing working at home and commuting.

In the qualitative research, some participants said that they had reverted to their pre-pandemic travel habits while others said they were continuing to walk for leisure during their lunch break and after work as an opportunity to change scenery and to get out of the house. While others lamented a decline in recreational walking, some were ‘treating’ themselves with taxis occasionally. The sometimes-subtle changes in transport behaviour mentioned by participants did not necessarily mean this was their “new normal”. Participants had not settled into new or consistent routines and anticipated some further volatility in working and travel patterns.

5 What were people's short-term travel plans?

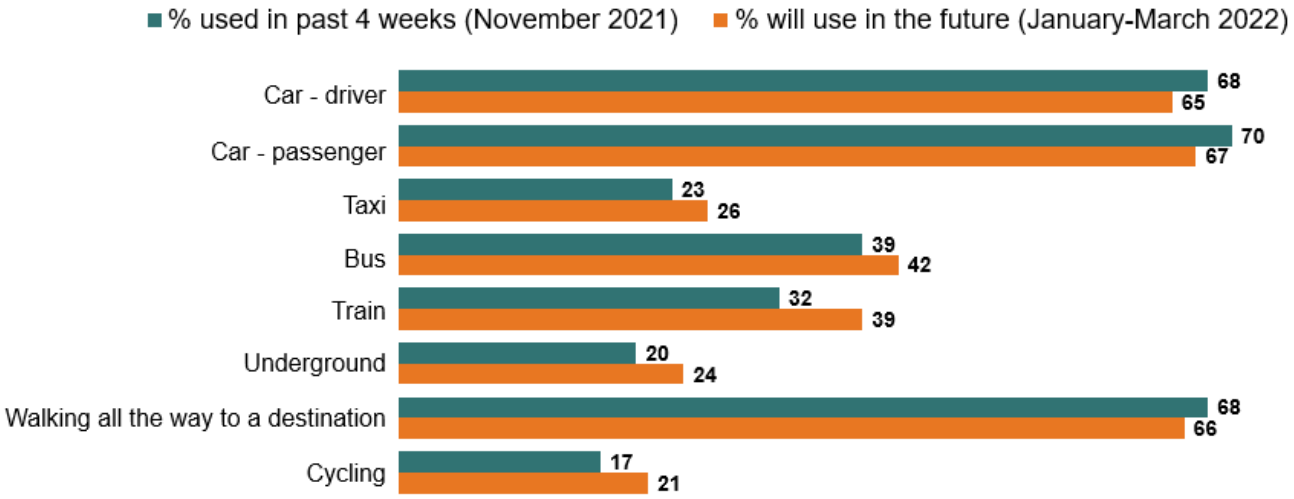
In this section, we report on findings from questions asking respondents to anticipate their use of different modes of transport, including public transport, in the first few months of 2022. We also look in detail at lapsed users of public transport and which modes they intended to travel by.

5.1 Propensity to travel in the short-term

As in the previous three waves – in November/December 2020 (wave 3), February/March 2021 (wave 4), and May/June 2021 (wave 5) – there was some expectation in November 2021 of increased travel in the short-term. While previous surveys asked about expectations in terms of the next four weeks, respondents at wave 6 were asked about "the first few months of next year, that is January-March 2022" (for the most part, a period of winter after Christmas and exactly two years after the pre-pandemic reference period used for *All change?*).

As Figure 19 shows, the proportion of people who expected to travel by car as a driver, by car as a passenger, and to walk all the way to a destination in the first few months of 2022 was lower than the proportion who travelled these ways during November 2021. However, levels of expected cycling and use of public transport modes in early 2022 – bus, train and underground/metro – exceeded those of past use. This was particularly the case for train travel; while 32% of people travelled by train during November 2021, 39% expected to do so during the first few months of 2022.

Figure 19: % used each mode in the past 4 weeks (November 2021) and % expected to use in January-March 2022



Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021
Q1. Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport? It does not matter how long the journey was, or why you made it.
Q12. Please now think about what you will be likely to do in the future. Please think about the first few months of next year, that is January-March 2022. How often, if at all, do you think you will be to travel using these modes during that time? It does not matter how long you think the journeys would be, or why you will make them

The use of public transport and taxis increased sharply during May/June 2021 and November 2021 when restrictions (with some exceptions) were lifted across the UK. During the same period, there were also increases in expected use of modes in the short-term. For example, as Table 18 shows, in May/June 2021 26% of people expected to travel by train in the next four weeks but, in November 2021, a higher proportion, 39%, expected to travel this way in the first few months of 2022. There were similar increases in expected travel between May/June 2021 and November 2021 for bus (9 points), underground/metro (8 points) and taxi (also 9 points).

Table 18: % expected to travel by each mode in the next 4 weeks in May/June 2021 compared with the proportion, in November 2021, expected to travel in the first few months of 2022 (any frequency)

	Next 4 weeks (May/June 2021)	January-March 2022 (November 2021)	± Difference
Car driver	66	65	-1
Car passenger	64	67	+3
Taxi	17	26	+9
Bus	33	42	+9
Train	26	39	+13
Underground/metro	16	24	+8
Cycling	21	21	0
Walking or wheeling all the way to a destination	65	66	+1

Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021, 4,700 UK adults (Wave 5), 17 May-8 June 2021
Q12. (Wave 5) 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.
Q12. (Wave 6) Please now think about what you will be likely to do in the future. Please think about the first few months of next year, that is January-March 2022. How often, if at all, do you think you will be to travel using these modes during that time? It does not matter how long you think the journeys would be, or why you will make them.

While there were increases between May/June 2021 and November 2021 in expected future travel, as Table 19 shows, actual behaviour and levels of usage of modes during November 2021 was lower than people had expected them to be in May/June 2021 in advance of all restrictions being lifted (this was introduced to respondents as *"scheduled to be no earlier than 21 June"*).

While allowance should be made for seasonal factors - respondents at wave 5 were asked about expected travel in a summer period while those at wave 6 were asked to recall mode use during November – this analysis further underlines the difficulty people have predicting their own future behaviour. This is likely to be related to the uncertainty and state of flux at the individual level highlighted by the *All change?* qualitative research; in

November/ December 2021, people were balancing new modes of travel, new routes, changes to routines and new ways of working given their own circumstances and a pandemic that has yet to run its course.

Table 19: % expected to travel by each mode in May/June 2021 'if all restrictions are lifted' compared with % who did travel by each mode in November 2021 (any frequency)

	…if all restrictions are lifted (May/June 2021)	Past 4 weeks (November 2021)	± Difference
Car driver	68	68	0
Car passenger	74	70	-4
Taxi	36	23	-13
Bus	51	39	-12
Train	53	32	-21
Underground/metro	34	20	-14
Walking or wheeling all the way to a destination	70	68	-2
Cycling	28	17	-11

Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021, 4,700 UK adults (Wave 5), 17 May-8 June 2021
Q62NEW (Wave 5). Please now think about what you will be likely to do if all restrictions are lifted (this is currently scheduled to be no earlier than 21 June). How often, if at all, do you think you will travel using these modes?
Q1./Q1a. (Wave 6) Thinking about the last 4 weeks, how often, if at all, did you personally travel by the following modes of transport?

Table 20 shows expected travel in the first few months of 2022 by bus, train and underground/metro for a selection of different groups. Levels of expected use were higher than average among those from ethnic minority backgrounds, those without access to a car or bicycle and among those living in London, reflecting more frequent use of public transport during November 2021 and greater dependency on these modes. For example, 68% of people living in London expected to travel by bus in the first few months of 2022, 61% by train and 64% by underground/metro.

Expected use of each mode was significantly higher among people who used the mode during the previous four weeks compared with the average. It was also higher among those who had used these modes once a week or more pre-pandemic (during the period January-March 2020); 80% of this group expected to use buses, 82% expected to use trains and 86% expected to travel by underground/metro. As was the case in May/June 2021, people who said they would feel comfortable travelling by the mode in the next four weeks were also more likely to expect to travel this way in the first few months of 2022, although relatively less so for underground/metro; 42% of those comfortable with using this

mode expected to travel this way in the first few months of 2022 compared with an equivalent 55% in terms of travelling by train and 62% in terms of travelling by bus.

Table 20: % of each group expected to travel by bus/train/underground/metro in the first few months of 2022, November 2021 (any frequency)

Group (base size)	Bus	Train	Underground/ metro
All adults (4,163)	42	39	24
16-34-year-olds (826)	51	52	34
55-75-year-olds (1,973)	41	32	16
Ethnic minority background (423)	57	50	47
Long-standing mental or physical health condition or illness (1,402)	44	40	22
Vaccinated – 1st and 2nd doses (2,778)	40	40	23
Not vaccinated - no doses (251)	38	30	19
No access to car/bicycle (533)	63	46	26
London (346)	68	61	64
Used mode pre-pandemic (any frequency)	65	59	56
Comfortable travelling by mode next 4 weeks	62	55	42
Used mode pre-pandemic once a week/ more often	80	82	86
Used mode in past 4 weeks	82	78	77

Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021 - table shows base sizes for groups where uniform across modes

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 future. Please think about the first few months of next year, that is January-March 2022. How often, if at all, do you think you will be to travel using these modes during that time? It does not matter how long you think the journeys would be, or why you will make them.

5.2 Lapsed public transport users and short-term travel plans

As mentioned previously, expected use of each mode of transport in the first few months of 2022 was significantly higher among people who used the mode during the previous four weeks in November 2021 compared with the average. Conversely, expected travel by bus, by train and by underground/metro in early 2022 was lower than average among lapsed users of public transport - people that had used public transport pre-pandemic but not in the previous four weeks. For example, 31% of lapsed users expected to travel by bus in the first few months of 2022, compared to 42% among the wider population but the proportions who expected to travel as a car driver were identical - 65% of both groups expected to travel this way in early 2022.

As shown in Table 21, in November 2021 lapsed users were less likely than average to expect to travel by public transport in early 2022, by taxi/mini-cab services and by app-based minicab services, but more likely than average to expect to travel as a car passenger in early 2022 - 73% expected to do this. They were no more likely to expect to walk all the way to a destination in the first few months of 2022 (although they were, however, more likely to expect to travel this way *frequently* i.e. once a week or more often). Lapsed users were less likely than average to expect to cycle in the first few months of 2022 - 16% compared to 21%.

Expected behaviours were potentially a reflection of the profile of lapsed users of public transport who were older than average in November 2021, more likely to be in full-time employment and to have access to a car or van. This group were relatively more likely than average to make a journey to go shopping and for recreation during November 2021 but less likely to travel to a workplace, to access entertainment, arts and events, or to go to pubs/bars/restaurants. Only 6% of lapsed users said they used public transport more often in November 2021 than earlier in the year and 70% reported having avoided using public transport because of concerns about infection through Coronavirus and winter illnesses.

Table 21: % of each group expected to travel by each mode in the first few months of 2022, November 2021 (any frequency)

Mode	All UK (4,163)	Lapsed users (454)	± Difference
Car driver	65	65	0
Car passenger	67	73	+7
Taxi	26	19	-7
App-based minicab services	18	8	-10
Bus	42	31	-11
Train	39	32	-7
Underground/metro	24	12	-12
Walking or wheeling all the way to a destination	66	69	+3
Cycling	21	16	-5

Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021
Q12. Please now think about what you will be likely to do in the future. Please think about the first few months of next year, that is January-March 2022. How often, if at all, do you think you will be to travel using these modes during that time? It does not matter how long you think the journeys would be, or why you will make them.

6 Were people comfortable travelling?

In this section, we report on findings from questions asking respondents to indicate how comfortable they felt they would be travelling using different modes of transport. *All change?* surveys have collected the experience of public transport users since February/March 2021 and we describe the main changes over time in this section, as well as summarising survey findings and qualitative research insights into what would encourage people to use public transport.

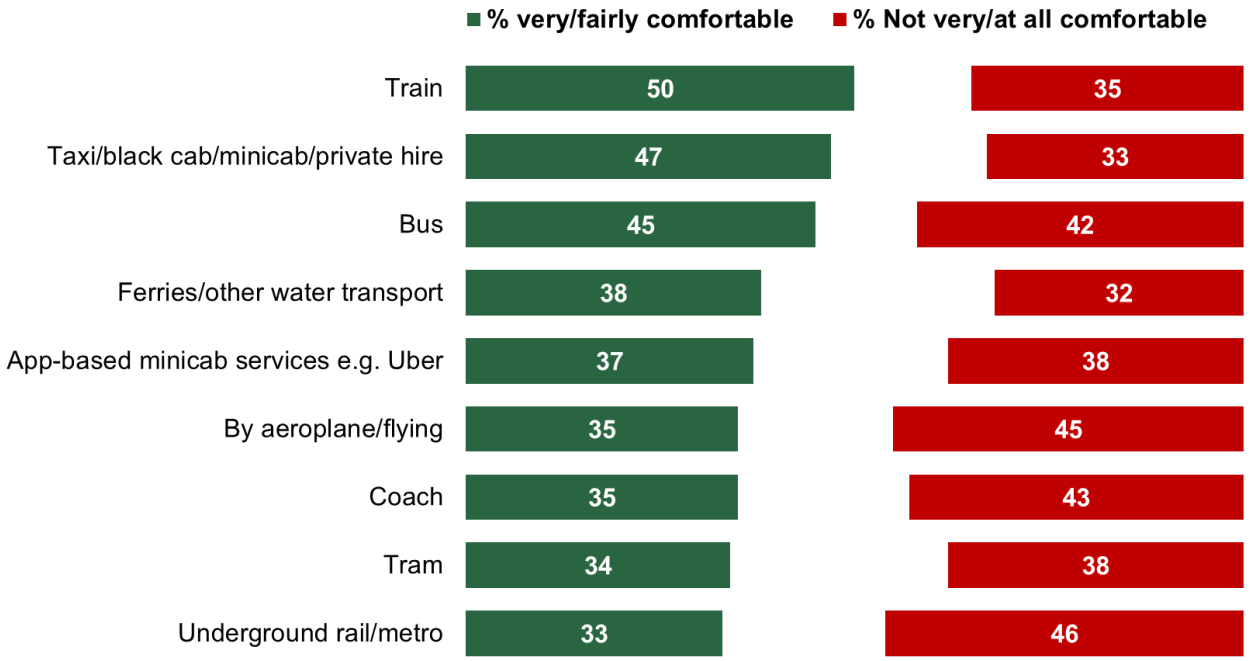
6.1 Comfort in using public and shared transport

Following an increase in levels of comfort travelling by public transport over the summer months during 2020 as restrictions were eased, there was little change over the subsequent period between November/December 2020 and February/March 2021. However, alongside an expected increase in travelling in the next four weeks following May/June 2021, levels of comfort with using public transport increased significantly *'if all restrictions are lifted'*. For example, 30% of people said they would be either very or fairly comfortable travelling by bus in the next four weeks after February/March 2021, but this increased to 49% in May/June 2021 in the event of restrictions being lifted.

In November 2021, levels of comfort travelling in the next four weeks were higher for train travel and by taxi compared with other modes, and more mixed for travelling by bus (shown in Figure 20 below). Half of UK adults said they would be either very or fairly comfortable travelling by train in the next four weeks, higher than the 35% who said they would be not very or not at all comfortable. Similar proportions were comfortable travelling by taxi (47%) as were *not* comfortable travelling this way (33%), while opinion was more polarised for travelling by bus - 45% said they would be comfortable travelling this way but 42% said they would be not very or not at all comfortable. Comfort levels were significantly lower for travel by underground/metro (46%) and by aeroplane (45%); only 33% and 35% respectively said they would be either very or fairly comfortable travelling by these modes.

The prospect of all adults having been offered first and second dose vaccination boosted comfort levels in May/June 2021; 46% said they were comfortable travelling by public transport "if all restrictions are lifted" (derived as an average across respondents' levels of comfort for individual modes bus, train and underground/metro services), but this reached 74% if all adults had been offered both doses. However, people's comfort did not reach these expected levels in November 2021 - a period after most restrictions had been lifted for several months (with a few exceptions) and during which all adults had been offered both doses. The average level of comfort across the three modes of public transport was 43%.

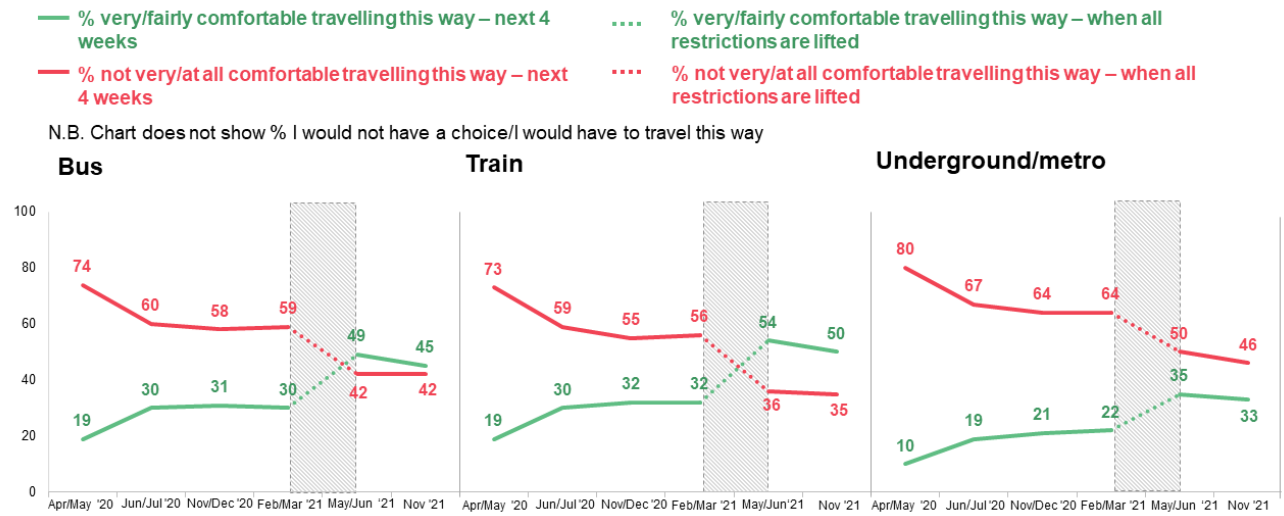
Figure 20: % very/fairly comfortable and not very/not at all comfortable with different modes of travel, November 2021



Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021
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.

Figure 21 shows that there was a clear 'cross-over' between May/June 2021 and November 2021 in levels of comfort and discomfort for bus and train travel. At the end of the period, higher proportions of people were positive than were negative for the first time in our series, but this did not happen for underground/metro travel. However, the proportion who said they would be not very or not at all comfortable travelling by underground/metro in the next four weeks fell from 64% in February/March 2021 to 46% in November 2021.

Figure 21: Trends - comfort levels for using public transport in the next 4 weeks/'if all restrictions are lifted'



Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021, 3,000-4,000 all other waves (Waves 1-4, 6) 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.
(Wave 5) Q14. Still thinking about what you will do *if all restrictions are lifted* (currently scheduled to be 21 June at the earliest), how comfortable, if at all, do you think you would feel choosing to travel by the following modes of transport?

As shown in Table 20, levels of comfort travelling by bus, by train and by underground/metro were higher among frequent users of each mode during the pre-pandemic period (January-March 2020). For example, 63% of frequent bus users before the pandemic - those who had travelled this way once a week or more often – said in November 2021 that they would be very or fairly comfortable travelling by bus in the next four weeks. A similar proportion, 65%, of those who had travelled by bus in the previous four weeks said they were either very or fairly comfortable doing so in the next four weeks, with equivalent proportions higher among recent train users (69%) but lower among underground/metro users (57%).

Table 20: % of each group very/fairly comfortable travelling by bus/train/ underground/metro in the next four weeks, November 2021

Group	Bus	Train	Underground/ metro
All adults (4,163)	45	50	33
16-34-year-olds (826)	46	54	41
55-75-year-olds (1,973)	45	47	25
Ethnic minority background (423)	45	51	39
Long-standing mental or physical health condition or illness (1,402)	42	46	30
Vaccinated – 1st and 2nd doses (2,778)	43	51	34
Not vaccinated - no doses (251)	52	49	39
No access to car/bicycle (533)	53	54	34
London (346)	52	56	45
Used mode pre-pandemic (any frequency)	55	60	47
Used mode pre-pandemic once a week/ more often	63	66	56
Used mode in past 4 weeks	65	69	57

Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021 - table shows base sizes for groups where uniform across modes
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.

As in May/June 2021, 16-24-year-olds (54%) and those with no access to a car or bicycle (53%) were more comfortable than average (45%) using a bus in the next four weeks in

November 2021. This was also the case for people living in London (52%) but geographical differences were less pronounced in November 2021 than they had been in May/June 2021 at the prospect of “all restrictions being lifted”. For example, people in the North East of England (56%) and in Scotland (52%) were equally comfortable using a bus in November 2021 as those in London (52%). People living in London and the North East were also more comfortable travelling by underground/metro - 45% and 43% respectively compared with an average of 33% across the UK; so too were younger age groups, reflecting greater use of, and familiarity with, these modes.

Among those aged 16-34 years old, 41% were very or fairly comfortable travelling by underground/metro in the next four weeks and 54% were comfortable travelling by train; levels of comfort were particularly high among those aged 16-24-year-olds (46% and 58% of this age group were comfortable travelling by underground/metro and train respectively). In terms of travelling by bus, those who had been vaccinated were relatively more comfortable (43%) than those that had not been vaccinated (52%), reflecting their younger age and other characteristics. However, in the case of travelling by train and by underground/metro, the attitudes of those who had been vaccinated were in line with those who had not.

An average of 46% said they had avoided public transport in the last four weeks because of concerns about Coronavirus. A similar 48% of those who *had not* used public transport during November 2021, said that they had avoided public transport in the last four weeks because of concerns about Coronavirus, meaning that more than half (52%) had other reasons for not using public transport. This included 22% who regarded this question as not applicable and a fifth, 22%, of those attributing their public transport avoidance to concerns about Coronavirus, did not use public transport before the pandemic.

The *All change?* qualitative research provides some useful context about the term “comfort” which has multiple meanings - for example, it could mean a comfortable seat or relate to familiarity with the mode - and it is also possible that avoidance of public transport may have encompassed certain times of travelling or days of the week rather than blanket avoidance, as well as choosing not to use particular modes while using others. Importantly, qualitative insights also underline the importance of necessity and habit as forces shaping people’s use of modes; travel will have been influenced by factors other than comfort.

It is also possible that attitudes are partly explained by confirmation bias - ‘I had to travel this way, so I was comfortable’ - and some academic studies have shown that behaviours can drive attitudes as much, if not more than, attitudes driving behaviours. In November 2021, 64% of those who recognised themselves as being reliant on public transport said they would be comfortable travelling by bus in the early months of 2022, much higher than the 39% of those who did *not* consider themselves as reliant on travelling this way (this group were older than average and drawn from higher income groups).

6.2 Experiences of travelling during November 2021

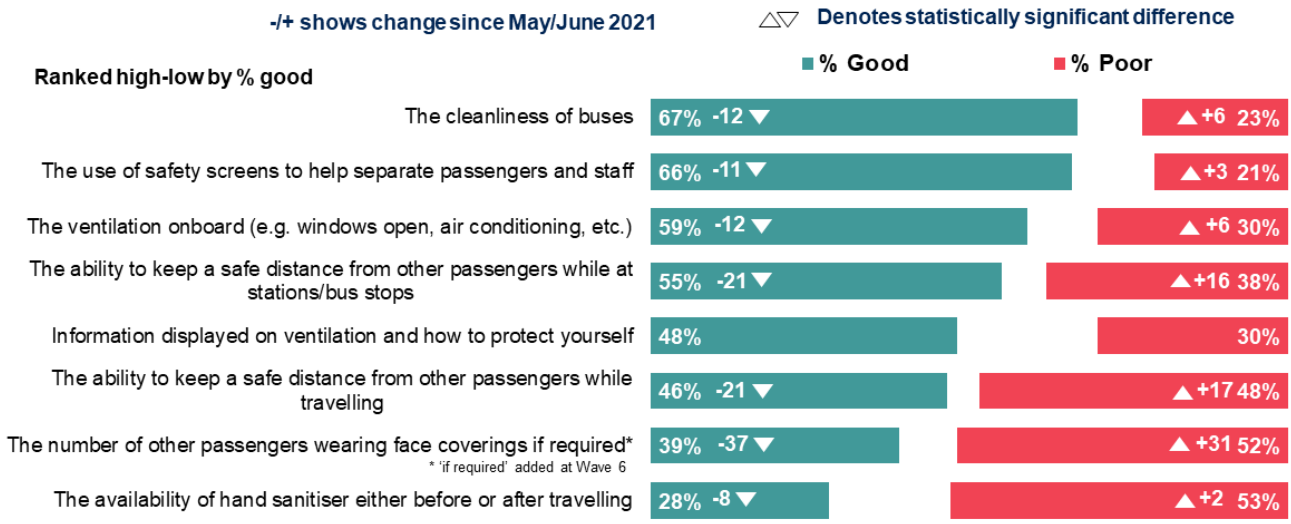
In November/December 2021, the qualitative research with those who had returned to public transport, found that they thought that other passengers had generally improved their etiquette as a result of the pandemic, by wearing face masks, socially distancing, and attempting to avoid overcrowding. This had helped them to feel more comfortable on trains in particular, with people respecting the space of others when boarding and choosing seats. Participants also felt more reassured about returning to public transport after being vaccinated, which eased anxiety towards catching anything while travelling.

The sixth *All change?* survey asked about the experiences of those travelling by bus, train and underground/metro and, specifically, ratings of COVID-related safety measures, shown in Figure 21, Figure 22 and Figure 23. Respondents were asked to rate the last journey they made.

As was the case in May/June 2021, people who made journeys by public transport in the previous four weeks during November 2021 were positive about their experience in terms of cleanliness and being able to keep a safe distance from other passengers at bus stops and train stations. However, there were significant falls in positive ratings of experiences among those who travelled by these modes between May/June 2021 and November 2021. While negative ratings fell between February/March 2021 and May/June 2021, they rose again in November 2021, all by statistically significant degrees (highlighted in Figures 23-25).

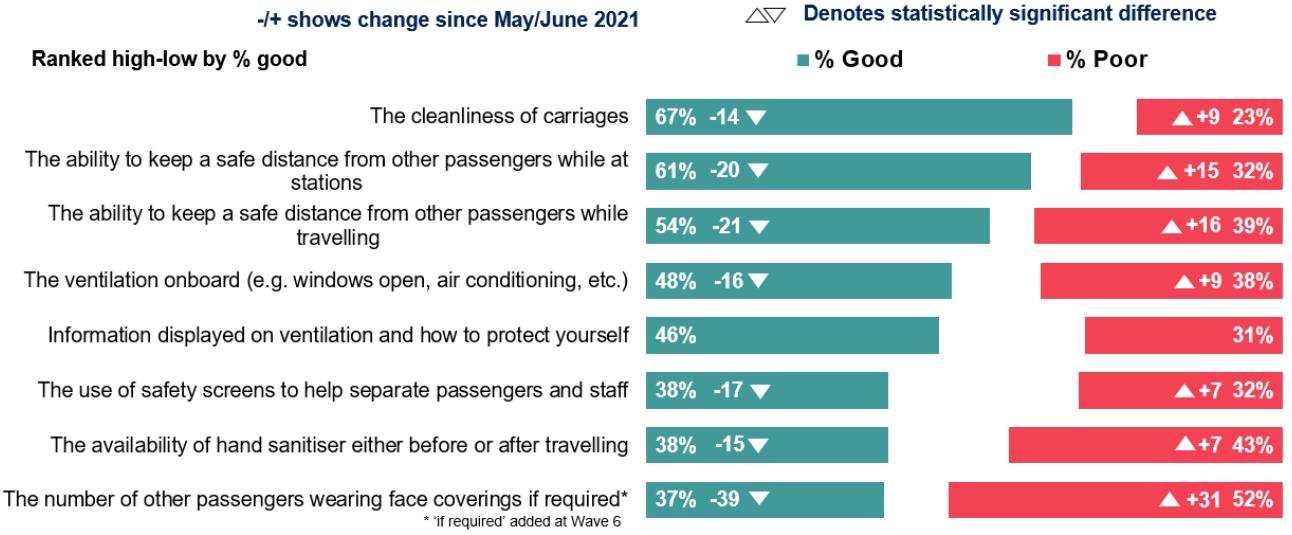
Some of the largest increases in negative ratings occurred in terms of the number of other passengers wearing face coverings – for example, 52% of bus passengers rated this as very or fairly poor, an increase from 21% in May/June 2021. This trend likely reflects the removal of the mandated wearing of face coverings in some parts of the UK (the question asked about these being worn "…if required", reflecting variation across nations) as well as, potentially, pro-mask sentiment identified by previous surveys; in May/June 2021, 65% supported the retention of face covering requirements for public transport. A similar proportion, 63%, supported social distancing requirements and ratings of this also deteriorated among public transport users between May/June 2021 and November 2021. For example, 54% of train passengers rated the ability to keep a safe distance from other passengers while travelling, down from 75% in May/June 2021.

Figure 21: Ratings of COVID-19-related safety measures among bus users



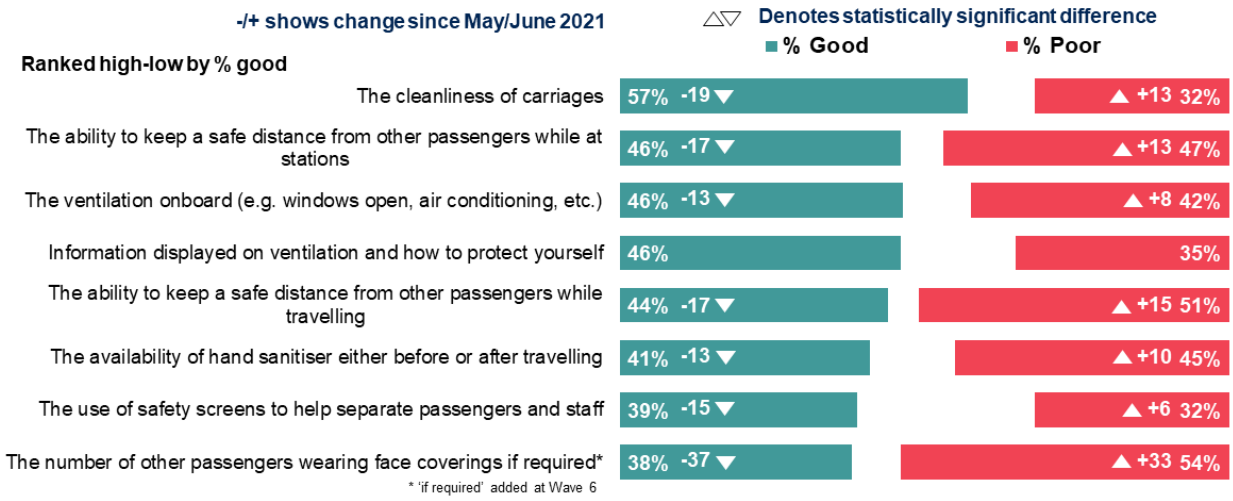
Source: Ipsos MORI/DfT; Base: 1,472 who travelled by bus in the last four weeks among 4,163 UK adults (Wave 6), 4-29 November 2021 (Wave 5: 1,232)
NEWQ48_5. You said earlier that you travelled by bus in the last 4 weeks. Thinking back to the last journey you made by bus, how would you rate it in terms of the following…?

Figure 22: Ratings of COVID-19-related safety measures among train users



Source: Ipsos MORI/DfT; Base: 1,104 who travelled by train in the last four weeks among 4,163 UK adults (Wave 6), 4-29 November 2021 (Wave 5: 731)
NEWQ48_8. You said earlier that you travelled by train in the last 4 weeks. Thinking back to the last journey you made by train, how would you rate it in terms of the following…?

Figure 23: Ratings of COVID-19-related safety measures among underground/ metro users



Source: Ipsos MORI/DfT; Base: 605 who travelled on the underground/metro in the last four weeks among 4,163 UK adults (Wave 6), 4-29 November 2021 (Wave 5: 440)
NEWQ48_10. You said earlier that you travelled by underground/metro in the last 4 weeks. Thinking back to the last journey you made by underground/metro, how would you rate it in terms of the following…?

The significant falls in positive ratings of experiences between May/June 2021 and November 2021 occurred during a period of increasing numbers of passengers. For example, the proportion of people travelling by bus at any point in the previous four weeks increased from 31% in May/June 2021 to 39% in November 2021, by train from 21% to 32% and by underground/metro from 14% to 20%. While overall levels of use of these modes were significantly below pre-pandemic levels, 14% of those who travelled by bus during November 2021 reported passengers standing on their last journey with the service being either crowded or very crowded. This experience was recalled by the same proportion of train users and by 24% of those who travelled by underground/metro.

The qualitative research found that the perceived lack of space in unhygienic and "overcrowded" buses and trains, impairing the ability to retain social distancing (particularly from those not wearing masks), was a salient concern among those who remained cautious about returning to public transport. There was also a sense that levels of crowding were approaching pre-pandemic levels; exposure to quieter trains and buses particularly during periods with tighter COVID-19 restrictions had provided people with a first-hand experience of public transport without daily rush hour crowds. This contributed to a sense that people's conceptions of "over-crowding" had changed and that they associated "good" travel with fewer passengers and more space.

Table 21 compares ratings of the ability to keep a safe distance from other passengers with perceptions of crowding while travelling by bus during November 2021. On balance, those who reported seats being available or usually available throughout their last journey, were more positive than negative, although 41% rated the ability to keep a safe distance as fairly or very poor. The proportion of users who were negative on this measure was higher among those who recalled some passengers standing - 58% - and was especially

high - 81% - among those who recall passengers standing while travelling on a crowded or very crowded service.

Table 21: ratings of the ability to keep a safe distance from other passengers while travelling among bus users during November 2021, analysed by recall of the level of crowding

	Seats available/ usually available throughout the journey (1,132)	**People were standing and there was enough space** (108)	**People were standing and it was crowded/ very crowded** (180)
% very good	16	18	4
% fairly good	40	21	12
% fairly poor	30	43	37
% very poor	11	15	43
% very/fairly good	**56**	**39**	**16**
% very/fairly poor	**41**	**58**	**81**

Source: Ipsos MORI/DfT; Base: 1,472 who travelled by bus in the last four weeks among 4,163 UK adults, 4-29 November 2021
Q48_5. You said earlier that you travelled by bus in the last 4 weeks. Thinking back to the last journey you made by bus, how would you rate it in terms of the following…?
Q69. Still thinking back to the last journey you made by bus/train/underground/metro in the last 4 weeks, overall, how crowded was the bus/train/underground/metro you travelled on then…? Please select one of these.

6.3 What would encourage people to use public transport?

The proportion of people who travelled by public transport modes – bus, train, underground/metro and tram – during November 2021, increased relative to May/June 2021 but usage levels remained significantly behind those before the pandemic (during January-March 2020). In May/June 2021, 38% of the UK public used any one of these modes at least once, or travelled by tram, but this increased to 51% in November 2021 after the lifting of most restrictions across the UK.

In November 2021 around 9% of people counted as lapsed users of public transport, having travelled by any one of the four modes in the pre-pandemic period but not during November 2021. Seven in ten of this group, 70%, said that they had avoided public transport during November 2021 because of concerns about Coronavirus, and 66% said they had avoided travelling by public transport at peak times for the same reasons.

As a group, lapsed users were reflective of the wider population and had a similar profile in terms of their vaccination status, but they were older; 37% were aged 55-75 years old. Associated with this, lapsed users were less likely to be in full-time employment and more likely to have access to a car, a van, or a bicycle. They were also less likely than average to have said they were comfortable travelling by public transport modes in the next four weeks.

As was the case among the wider population, higher proportions of lapsed users, reported having avoided public transport because of Coronavirus (70%) than said the same about winter illnesses such as flu, coughs and colds (62%); the equivalent proportions among the wider public were 46% and 40% respectively.

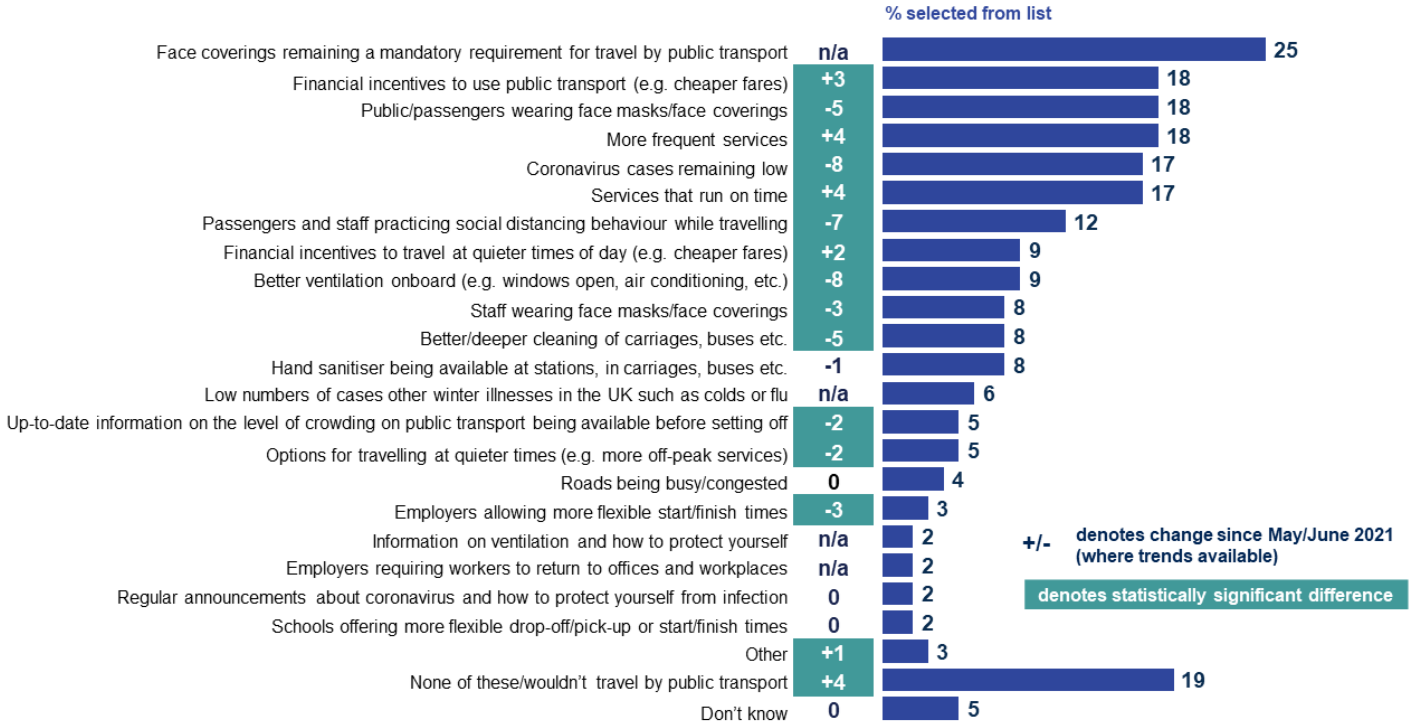
In the qualitative research, participants who remained cautious about returning to public transport or who had avoided it entirely, shared a range of reasons behind their decisions, and tended to reflect on travelling by public transport compared with being in other public settings during the pandemic such as a cinema or supermarket. The pandemic had amplified pre-existing unfavourable comparisons including the lack of space making public transport harder to socially distance, particularly from those not wearing masks, and the relative lack of cleanliness e.g. dirty windows and seats, and the amount of litter. This further emphasised that messaging about the importance of sanitation and cleaning of surfaces as key factors in how the public assess their own risk.

Since the outset, *All change?* surveys have asked people which two or three factors from a list would encourage them personally to consider travelling by some form of public transport. As shown in Figure 26 below, face coverings being a mandatory requirement was a top-mentioned requirement, selected by 25%, reflecting findings from previous surveys and qualitative research highlighting that the public were more positive than not about retaining mask-wearing. The proportion of people selecting financial incentives to use public transport (e.g. cheaper fares) increased by three percentage points from 15% to 18% between May/June 2021 and November 2021.

Qualitative research discussions found that participants had experienced substantial cost savings during parts of the pandemic given that they were not having to pay for travel to and from work. They explained that they had calculated how much they had saved over certain periods of the pandemic where they had been home working 100% of the time and had worked out what that money could be better spent on. There was also a sense that there would likely be a price increase on trains early in 2022, creating an expectation that commuting would become even more expensive than it had been previously - a further disincentive to travelling this way.

Between May/June 2021 and November 2021 there was an increase in the proportion of people who said more frequent services (an increase from 14% to 18%) and services that run on time (an increase from 13% to 17%) would encourage them to consider using public transport, shown in Figure 24. Passengers wearing face masks/face coverings and Coronavirus cases remaining low were also among the top-mentioned factors providing encouragement. However, salience of these fell between May/June 2021 and November 2021; by five percentage points from 23% to 18% in terms of mask-wearing and by eight percentage points from 25% to 17% in terms of low numbers of Coronavirus cases.

Figure 24: Considered requirements/compliances offering encouragement to travel on public transport – November 2021



Source: Ipsos MORI/DfT; Base: 4,163 UK adults aged 16-75 (Wave 6), 4-29 November 2021; 4,700 UK adults aged 16-75 (Wave 5), 17 May-8 June 2021
Q15. Still thinking about what you will do in the next 4 weeks or so, which two or three, if any, of these would encourage you personally to consider travelling by some form of public transport – that is by bus, train, tram or underground/metro railway?

While these changes highlight the growing importance of more frequent and reliable services in November 2021 compared with May/June 2021 (a point at which several Coronavirus-related restrictions remained in place), lapsed users of public transport were more likely than the wider public to identify mandatory face coverings and cases remaining low as offering encouragement – 36% and 26% mentioned these. Similarly, a higher proportion of those who travelled to work during November 2021 at least once and had avoided public transport because of concerns about Coronavirus, identified face coverings (31%) remaining a mandatory requirement for travel and passengers wearing face coverings (25%), compared with 25% and 18% respectively, among the public as a whole.

A third of those who had not travelled by public transport at all during November 2021 said that none of the possibilities offered would encourage them to travel by public transport, while those who had travelled by public transport were more likely than average to choose most of the options. However, face coverings remaining a mandatory requirement for travel by public transport was also selected by the highest proportion of this group (28%) as it was for those who travelled by bus (27%), underground/metro (27%) and by train (24%).

The focus on making public transport a safer environment was also evident in the qualitative research which suggested changing perceptions and expectations as a result of the pandemic. Participants described being more selective about the types of journeys

they make and the modes of transport they had been using since the outset of the pandemic. Travelling by car or taxi was seen as being more COVID-secure, more convenient, and more comfortable. Public transport will also need to offer flexibility – participants felt that their priorities had changed meaning greater expectations that transport should fit around their personal lives rather than vice versa.

7 How sustainable are behaviours?

In this section, we provide details of attitudes and behaviours in respect of active and sustainable travel and travelling overseas, drawing on surveys and qualitative research conducted as part of the *All change?* programme. We focus on November 2021 - a month in which the COP26 conference was held in Glasgow[9] - while also considering changes in attitudes and behaviours across the *All change?* series of surveys.

7.1 Active travel

By November 2021, 61% said they had walked or cycled for pleasure/exercise in the past four weeks and a similar proportion, 62%, said they would like to do more walking and or cycling in future for pleasure/exercise. Earlier in the pandemic there was an increase in cycling and walking particularly for recreation[10] and qualitative research found that high levels of compliance with lockdown restrictions were instrumental in participants' decisions to walk more. People took the opportunity to explore their local area beyond their tried-and-tested routes, and the sometimes-surprising convenience of being able to walk to local amenities also helped as well as the closure of gyms which motivated people to seek alternative forms of exercise. Participants recalled the incorporation of more active or sustainable travel into frequent journey routines.

Since April/May 2020, however, there was a significant drop in the proportion of people who said they were willing to cycle or walk more to reduce their contribution to climate change – from 63% to 56% in May/June 2021 and the same in November 2021. Women (61%) were more likely to agree with this statement compared to men (52%), as were younger adults aged 16-34 (62%) compared to older adults aged 55-75 (49%). Similarly, people in London (63%), those who own or have access to a bicycle (65%), who don't own a car or van (63%) and who identified themselves as being reliant on public transport (72%), were more likely than average to have said they were willing to do more active travel for this reason.

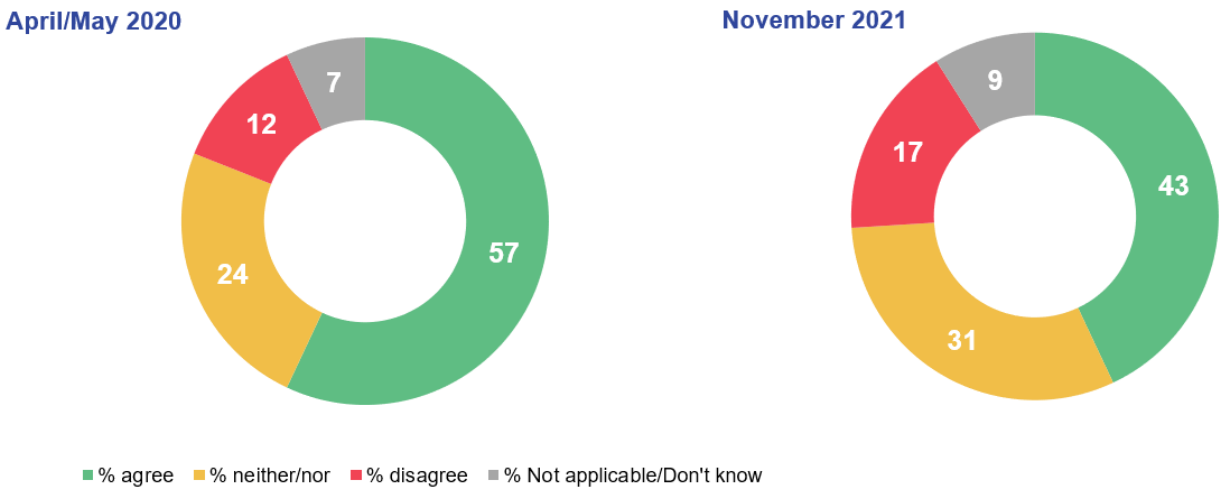
Changes in attitudes between Spring 2020 and November 2021 were likely to reflect changes in behaviours during the first UK-wide lockdown in 2020. Qualitative research found high levels of compliance with lockdown restrictions were key in the decision to walk more given that people were only permitted to go out of their house for a limited time to exercise and to mix in limited numbers. Participants therefore initially took up more walking as an opportunity to get outdoors and exercise in line with government guidance.

Despite the physical and mental health benefits, the longer-term continuation of walking and cycling was doubted and, as Figure 25 shows, there was a decline in the proportion of

[9] The COP26 summit was held in Glasgow between 31 October 2021-12 November 2021. It brought parties together to accelerate action towards the goals of the Paris Agreement and the UN Framework Convention on Climate Change.
[10] See, for example, https://www.sportengland.org/news/sport-and-physical-activity-must-be-used-level-and-tackle-inequalities

people who expected to be walking more than they were before the pandemic (from 57% in April/May 2020 to 43% in November 2021).

Figure 25: % agreed/disagreed 'I will walk more than I did before the pandemic' – April/May 2020 vs. November 2021



Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6) 4-29 November
Q20AMENDED. Let's think ahead to about 12 months from now and imagine that no restrictions are in place. To what extent do you agree or disagree with each of the following? Please indicate if the statement is not applicable.

The qualitative research found a lack of certainty among participants about whether their adoption of walking and/or cycling would remain permanent. Participants expected that darker nights, the return to more commuting, and changing work patterns could all potentially disrupt active travel behaviours. The weather was important too; "fairweather cyclists" preferred to cycle in the spring and summer as opposed to the winter months. According to the survey, 15% agreed that they will cycle more in 12 months' time than they did before the pandemic, while almost 3 in 10 disagreed (27%).

7.2 Sustainable travel

Shortly after the COP26 conference in Glasgow, pollution and climate change topped the list of national concerns in Ipsos MORI's November Issues Index. This monthly survey captures spontaneous mentions of the most/other important issues facing the country and, in November, the highest score for pollution and climate change was recorded since 1988. Levels of concern about pollution and climate change declined during December partly because of the salience of the Omicron variant as an issue before Christmas, before rising in January 2022.

There was a significant increase in the proportion of people who agreed that climate change was as serious as Coronavirus – 67% took this view in November 2021 compared with 65% in May/June 2021. Women (70%), those who had used public transport in the previous four weeks and before the pandemic (69%), and those who cycled frequently (once a week or more) before the pandemic (67%), were more likely than average to agree.

Four in ten said they were willing to limit flying, or switch modes to reduce flying and their contribution to climate change, and since April/May 2020 the proportion of people taking this view increased significantly from 39% to 43%. There was an even sharper increase in terms of stated willingness to use public transport more to reduce climate change - from 34% to 40% over the same period.

Willingness to limit flying, or switch modes to reduce flying, was higher among younger age groups (16-34-year-olds) and also among those aged 35-54 - 49% and 42% respectively - compared to 37% of those aged 55-75. People living in ABC1 households (44%) and those in employment (46%) were also more likely than average to have taken this view as were those who used public transport during November 2021 (50% said they would).

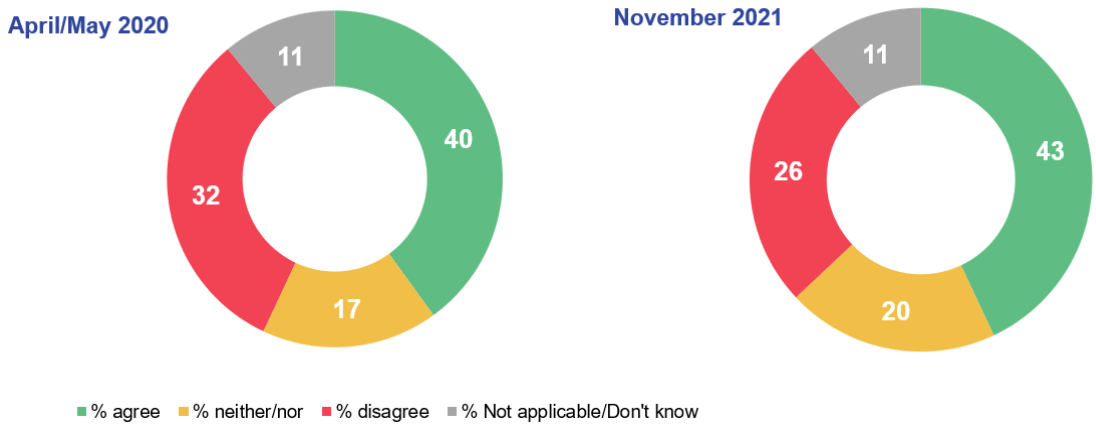
In November 2021, three in ten UK adults, 30%, disagreed that ‘I prefer to travel by ferry more rather than by plane’, a proportion in line with 29% in April/May 2020. There was, though, a decrease in the proportion who agreed; this fell by two percentage points over the same period from 18% to 16% in November 2021. While a quarter (26%) of UK adults indicated that they did not travel by these modes, there was a similar pattern in sentiment when 'not applicable' responses were excluded from the analysis: 40% agreed in April/May 2020 and again in November 2021, and the proportion who disagreed fell from 24% to 21%.

Similarly, the proportion of UK adults who said they would avoid going on a cruise in 12 months’ time (assuming the absence of restrictions) fell four percentage points to 40%. In April/May 2020, there was some media coverage of cruise ships having to return to dock so that passengers could isolate. Then, 11% disagreed they would avoid going on a cruise, but this increased significantly to 17% in November 2021.

In line with May/June 2021, 38% of people in November 2021 agreed that they will take more of their holidays in the UK than abroad and just over four in ten (43%) said they were willing to limit their flying or replace some flights with train or bus journeys to reduce their contribution to climate change. Women (43%), those aged 55-75 years old (41%), and from higher income households (earning over £40,000) (42%) were more likely than average (38%) to say they would opt for more staycations than holidays abroad in future.

However, following the lifting of restrictions, the proportion of people expecting to ‘go back’ to doing all the things they did before the pandemic including holidays and travel, was higher than it had been in April/May 2020; 40% of people took this view during the first UK-wide lockdown and 43% in November 2021, shown in Figure 26, but the proportion had been higher in May/June 2021 at 46%.

Figure 26: % agreed/disagreed 'I will go back to doing all of the things I did before the pandemic including holidays and travel' – April/May 2020 vs. November 2021



Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6) 4-29 November
Q20AMENDED. Let's think ahead to about 12 months from now and imagine that no restrictions are in place. To what extent do you agree or disagree with each of the following? Please indicate if the statement is not applicable.

The survey research found willingness and interest among the public in travelling more sustainably, and qualitative research participants were also open to walking and/or cycling more, especially when framed as a means to help combat climate change. However, the environment was not an especially salient consideration and *All change?* echoed other research highlighting that convenience, comfort and cost, underpinned by habit, are the most important factors influencing travel decisions.[11]

These factors featured in the reasons participants gave for not feeling able to travel more sustainably. There were also several barriers for some groups and geographies including insufficient infrastructure and numerous safety concerns associated with the uptake of walking and cycling. Similarly, other research by Ipsos MORI has found that while the public support Net Zero policies when they are outlined initially, that support falls dramatically when they are presented with the possible lifestyle and financial cost implications for them personally.[12]

7.3 Car dependency

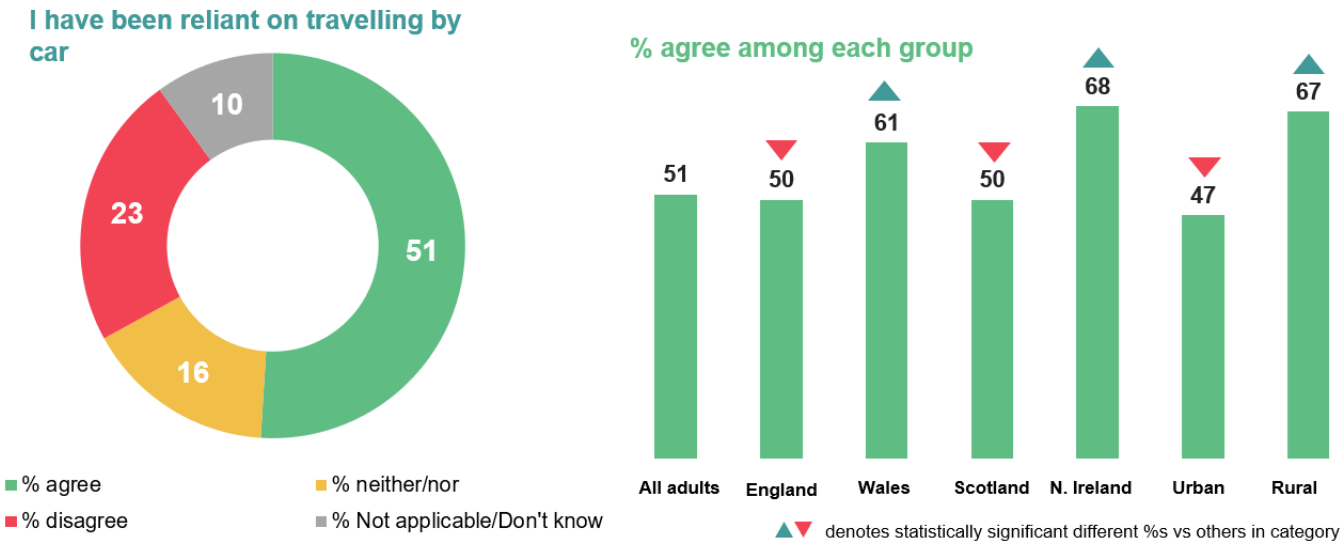
Car dependency also impacts on people's ability to travel more sustainably. *All Change?* found a strong attachment to the car evident in previous research.[13] While the overall proportion of people travelling by car - as a driver and as a passenger - had not reached pre-pandemic levels by November 2021, levels of frequent (once a week or more often) and very frequent use (5 days a week or more often) were in line with those in January-March 2020.

While four in ten (40%) people agreed that they would be willing to use public transport more to reduce their contribution to climate change in November 2021, a majority (55%)

[11] *Decarbonising Transport Deliberative Research*, Britain Thinks for Department for Transport, December 2020.
[12] https://www.ipsos.com/ipsos-mori/en-uk/almanac/public-support-majority-net-zero-policies-unless-there-is-a-personal-cost
[13] *Decarbonising Transport Deliberative Research*, Britain Thinks for Department for Transport, December 2020.

also said they could not get by without using their car. This was twice the proportion of those who are reliant on using public transport (27%). Perceived car-dependency was higher in some parts of the UK, as shown in Figure 27; it was highest in Northern Ireland and Wales where 68% and 61% said they had been 'reliant' on travelling by car in the previous four weeks compared with 50% in both England and Scotland. In rural areas, 67% of people said they had been reliant on travelling by car, much higher than in urban areas (47%).

Figure 27: Overall reliance on car and differences by geography



Source: Ipsos MORI/DfT; Base: 4,163 UK adults (Wave 6), 4-29 November 2021
Q68NEW. Again, thinking about your travel in the last 4 weeks, to what extent do you agree or disagree with each of the following? Please indicate if the statement is not applicable.

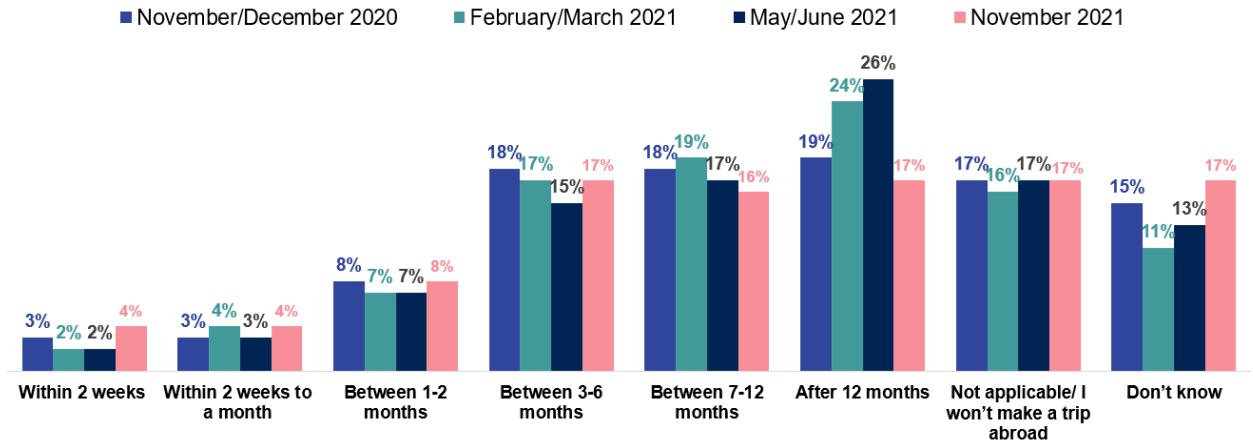
According to longitudinal analysis among 925 respondents who participated in the first and final *All change?* surveys, 12% of UK adults changed their ownership of a car in some way between April/May 2020 and November 2021. Half this proportion, 6%, obtained a car/another car and the same proportion had sold/given up a car (6%). The most common changes were obtaining a car having not had one previously (2%) and reducing ownership from two cars to one (4%). The qualitative research found some discussions about changes in commuting patterns prompting a rethink about the need to own a second car, even any car (in larger cities). There was also some interest in options around purchasing or leasing an electric vehicle in the immediate or near future, with participants considering government-led support and policy such as Clean Air Zones as potentially important too.

7.4 Overseas travel

Figure 28 shows how intentions to travel abroad have changed since the outset of the pandemic. In November/December 2020 and February/March 2021 - two periods with various restrictions in place across the UK - half of the public expected to travel abroad within a year of restrictions being lifted. This declined from 49% to 44% between February/March 2021 and May/June 2021. In November 2021, when most restrictions had

been lifted across the UK, the proportion of people who expected to travel abroad within a year increased back to 49%.

Figure 28. Expectations of intention to travel abroad once travel restrictions have ended



Source: Ipsos MORI/DfT; Base: 4,163 UK adults aged 16-75 (Wave 6), 4-29 November 2021
W6NEWQ49. Let's think ahead to a time when travel restrictions have ended, how long after that time do you think it will be before you go on a trip abroad? It could be for any reason – a holiday, a short trip, a business trip or something else.

Between May/June 2021 and November 2021, there was an increase in the proportion of people who expected to travel abroad in the short-term (within the next 6 months). Younger adults aged 16-34 were more likely to expect to travel abroad within 1-2 months (13%) - compared with adults aged 35-54 (7%) and older adults aged 55-75 (6%). Those from ethnic minority backgrounds, those in higher income households (earning over £40,000), and those who had at least one dose of the vaccine, were also more likely to expect to travel abroad within 6 months.

People were, however, more uncertain about travelling abroad in November 2021, with a significant decrease (nine percentage points) in the proportion of people who expected to travel abroad in the long-term (after 12 months) and an increase in the proportion who answered don't know – from 13% in May/June 2021 to 17% in November 2021.

When thinking about holiday destinations, a higher proportion of people expected to travel closer to home; for example, a third (33%) said they would travel on holiday to Europe in the next 6 months or had already done so, compared to 17% for a holiday outside of Europe.

Appendices

Appendix A – Sample profile

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

Population group	Sample size (unweighted)	Unweighted %	Weighted %
UK adults aged 16-75	4,163	100	100
England	2,271	55	84
Scotland	1,008	24	8
Wales	681	16	5
Northern Ireland	203	5	3
Urban	2,817	77*	82*
Rural	833	23*	18*
Male	1,922	46	49
Female	2,228	54	50
16-24	216	5	10
25-34	610	15	23
35-44	651	16	17
45-54	713	17	19
55-75	1,973	47	31
Working full-time/part-time	2,427	58	63
Not working	1,736	42	37
Ethnic minority groups	423	10	14
Up to £16,106 ('lower')	973	23*	26*
£16,106-£39,999 ('medium')	1,821	44*	44*
£40,000+ ('higher')	1,369	33*	30*
Long-standing mental or physical health condition or illness	1,402	34*	31*

Source: Ipsos MORI/DfT, 4,163 UK adults (Wave 6), 4-29 November 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
4,163	0.9	1.4	1.5

For example, with a sample size of 4,163 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 ±1.4 percentage points from the survey result (i.e. between 28.6% and 31.4%).

The following table illustrates the sampling tolerances when comparing different sub-samples of Wave 6 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%
826 vs. 1,973 (16-34-year olds vs. 55-75-year olds)	3	4	5
2,817 vs. 833 (Urban vs. Rural)	3	4	4
2,975 vs. 1,188 (pre-pandemic public transport user vs. non-user)	2	4	4

For example, if 30% of 16-34-year-olds give a particular answer compared to 34% of those aged 55-75 (assuming sample sizes in the table above), then the chances are 19 in 20 that this four-point difference is statistically significant.

Appendix C – Mode use - selected groups and geographies

Table C.1: % who cycled during the last 4 weeks* – selected groups and geographies
(across whole of UK unless stated otherwise) (highlighted +/- indicates statistically significant change)

	January-March 2020*	Apr/May 2020	June/July 2020	Nov/Dec 2020	February/ March 2021	May/June 2021	November 2021	+/- Change: May/June 2021 – Nov 2021	+/- Change: Jan-March 2020 – Nov 2021
All UK	30	21	27	16	15	18	17	-1	-13
England	31	21	27	17	15	19	17	-2	-14
Scotland	26	18	27	13	11	13	14	+1	-12
Wales	27	18	24	14	14	16	15	-1	-12
Northern Ireland	27	17	25	8	9	13	15	+2	-12
Urban	30	22	28	17	15	19	17	-2	-13
Rural	28	15	20	12	13	13	13	0	-15
16-34	38	29	38	21	21	27	24	-3	-14
35-54	31	21	25	17	14	17	16	-1	-15
55-75	20	12	18	10	10	11	10	-1	-10

Men	39	26	33	22	18	24	21	-3	-18
Women	21	16	21	10	11	13	13	0	-8
People with a disability	24	17	22	13	11	16	16	0	-8
Ethnic minority groups	36	26	38	22	19	27	24	-3	-12
Working full/part-time	32	23	30	18	16	22	20	-2	-12
Low income household	27	20	26	13	12	10	19	+9	-8
Don't own a car/bicycle	12	6	10	5	2	3	3	0	-9

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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).

* January-March 2020 recall from Wave 1 survey (also asked at Wave 6)

Table C.2: % who walked or wheeled all the way to a destination during the last 4 weeks* – selected groups and geographies
(across whole of UK unless stated otherwise) (highlighted +/- indicates statistically significant change)

	January-March 2020*	Apr/May 2020	June/July 2020	Nov/Dec 2020	February/ March 2021	May/June 2021	November 2021	+/- Change: May/June 2021 – Nov 2021	+/- Change: Jan-March 2020 – Nov 2021
All UK	78	65	72	63	63	65	68	+3	-10
England	79	66	73	64	65	65	69	+4	-10
Scotland	76	61	69	61	63	63	68	+5	-8
Wales	75	62	68	57	50	61	60	-1	-15
Northern Ireland	71	51	63	50	56	47	54	+7	-17
Urban	80	68	74	66	66	67	71	+4	-9
Rural	67	52	59	47	53	53	54	+1	-13
16-34	84	71	76	64	67	72	71	-1	-13
35-54	78	64	73	62	61	62	67	+5	-11
55-75	74	62	68	61	62	60	66	+6	-8

Men	79	67	73	64	62	65	71	+6	-8
Women	78	63	72	62	65	64	65	+1	-13
People with a disability	79	68	71	60	61	63	66	+3	-13
Ethnic minority groups	77	61	73	60	60	67	71	+4	-6
Working full/part-time	78	64	71	63	62	64	68	+4	-10
Low income household	75	66	76	63	63	65	68	+3	-7
Don’t own a car/bicycle	84	81	82	75	71	73	80	+7	-4

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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).

* January-March 2020 recall from Wave 1 survey (also asked at Wave 6)

Table C.3: % drove a car during the last 4 weeks* – selected groups and geographies
(across whole of UK unless stated otherwise) (highlighted +/- indicates statistically significant change)

	January-March 2020*	Apr/May 2020	June/July 2020	Nov/Dec 2020	February/ March 2021	May/June 2021	November 2021	+/- Change: May/June 2021 – Nov 2021	+/- Change: Jan-March 2020 – Nov 2021
All UK	72	63	67	65	63	68	68	0	-4
England	71	63	67	65	62	67	68	+1	-3
Scotland	68	61	67	65	66	68	66	-2	-2
Wales	76	72	74	72	71	71	70	-1	-6
Northern Ireland	82	80	75	74	69	72	80	+8	-2
Urban	70	61	65	63	62	65	67	+2	-3
Rural	84	78	82	79	79	81	77	-4	-7
16-34	64	53	63	60	52	61	62	+1	-2
35-54	71	65	65	63	63	67	67	0	-4
55-75	80	72	76	75	75	75	77	+2	-3

Men	74	66	70	68	67	72	70	-2	-4
Women	69	60	65	63	59	64	67	+3	-2
People with a disability	68	60	62	58	59	62	61	-1	-7
Ethnic minority groups	64	57	60	58	54	59	59	0	-5
Working full/part-time	79	71	75	74	73	75	75	0	-4
Low income household	57	49	52	49	49	50	53	+3	-4
Don't own a car/bicycle	15	3	12	7	5	8	9	+1	-6

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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).

* January-March 2020 recall from Wave 1 survey (also asked at Wave 6)

Table C.4: % travelled as a car passenger during the last 4 weeks* – selected groups and geographies
(across whole of UK unless stated otherwise) (highlighted +/- indicates statistically significant change)

	January-March 2020*	Apr/May 2020	June/July 2020	Nov/Dec 2020	February/ March 2021	May/June 2021	November 2021	+/- Change: May/June 2021 – Nov 2021	+/- Change: Jan-March 2020 – Nov 2021
All UK	80	43	69	56	54	66	70	+4	-10
England	80	43	69	56	54	66	70	+4	-10
Scotland	78	41	68	55	50	61	69	+8	-9
Wales	81	44	70	65	56	68	70	+2	-11
Northern Ireland	79	54	78	66	60	73	79	+6	0
Urban	80	43	69	55	53	65	69	+4	-11
Rural	78	46	69	58	57	69	72	+3	-6
16-34	86	56	83	66	67	81	80	-1	-6
35-54	79	38	64	51	47	61	69	+8	-10
55-75	73	35	61	51	47	56	62	+6	-11

Men	74	36	61	47	45	58	63	+5	-11
Women	85	51	77	65	62	74	77	+3	-8
People with a disability	77	43	69	55	51	67	72	+5	-5
Ethnic minority groups	82	51	74	62	54	69	74	+5	-8
Working full/part-time	81	42	70	58	53	66	71	+5	-10
Low income household	70	37	61	47	42	52	66	+14	-4
Don’t own a car/bicycle	66	28	49	36	27	50	55	+5	-11

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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).

* January-March 2020 recall from Wave 1 survey (also asked at Wave 6)

Table C.5: % travelled by taxi/black cab services during the last 4 weeks* – selected groups and geographies
(across whole of UK unless stated otherwise) (highlighted +/- indicates statistically significant change)

	January-March 2020*	Apr/May 2020	June/July 2020	Nov/Dec 2020	February/ March 2021	May/June 2021	November 2021	+/- Change: May/June 2021 – Nov 2021	+/- Change: Jan-March 2020 – Nov 2021
All UK	46	11	26	12	10	17	23	+6	-23
England	46	12	26	11	10	18	22	+4	-24
Scotland	51	10	27	14	8	16	31	+15	-20
Wales	37	9	23	16	10	12	17	+5	-20
Northern Ireland	44	11	33	12	6	15	28	+13	-16
Urban	49	12	27	13	11	19	25	+6	-24
Rural	31	5	16	6	4	7	12	+5	-19
16-34	55	18	37	18	15	30	33	+3	-22
35-54	45	10	23	9	8	13	23	+10	-22
55-75	36	6	18	7	6	9	13	+4	-23

Men	45	14	28	14	11	19	23	+4	-22
Women	46	8	24	10	9	16	23	+7	-23
People with a disability	45	13	26	14	13	20	25	+5	-20
Ethnic minority groups	55	22	39	20	21	31	38	+7	-17
Working full/part-time	48	12	29	12	11	20	27	+7	-21
Low income household	44	15	27	16	11	11	24	+13	-20
Don't own a car/bicycle	57	16	32	21	16	26	33	+7	-24

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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).

* January-March 2020 recall from Wave 1 survey (also asked at Wave 6)

Table C.6: % travelled by app-based minicab services (e.g. Uber) during the last 4 weeks* – selected groups and geographies
(across whole of UK unless stated otherwise) (highlighted +/- indicates statistically significant change)

	January-March 2020*	Apr/May 2020	June/July 2020	Nov/Dec 2020	February/ March 2021	May/June 2021	November 2021	+/- Change: May/June 2021 – Nov 2021	+/- Change: Jan-March 2020 – Nov 2021
All UK	28	8	17	9	8	13	17	+4	-11
England	29	8	17	10	8	15	18	+3	-11
Scotland	23	5	13	5	5	6	16	+10	-7
Wales	17	5	11	7	6	8	7	-1	-10
Northern Ireland	21	4	14	4	1	7	9	+2	-12
Urban	30	5	17	10	8	14	17	+2	-13
Rural	14	3	8	4	3	5	6	+1	-8
16-34	46	15	34	18	16	30	34	+4	-12
35-54	26	6	11	6	6	7	13	+6	-13
55-75	12	3	5	3	1	2	3	+1	-9

Men	28	6	18	9	7	15	16	+1	-12
Women	28	3	16	9	8	12	18	+6	-10
People with a disability	24	8	13	9	8	14	17	+3	-7
Ethnic minority groups	50	19	38	24	24	31	41	+10	-9
Working full/part-time	32	9	20	10	9	16	21	+5	-11
Low income household	24	10	16	11	8	5	19	+14	-5
Don’t own a car/bicycle	36	9	17	12	8	16	22	+6	-14

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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). Ipsos MORI/DfT, Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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).
* January-March 2020 recall from Wave 1 survey (also asked at Wave 6)

Table C.7: % travelled by bus during the last 4 weeks* – selected groups and geographies
(across whole of UK unless stated otherwise) (highlighted +/- change indicates statistically significant change)

	January-March 2020*	Apr/May 2020	June/July 2020	Nov/Dec 2020	February/ March 2021	May/June 2021	November 2021	+/- Change: May/June 2021 – Nov 2021	+/- Change: Jan-March 2020 – Nov 2021
All UK	63	18	31	24	19	31	39	+8	-24
England	63	19	31	24	19	32	39	+7	-24
Scotland	66	16	32	29	16	31	43	+12	-23
Wales	50	11	26	16	15	20	30	+10	-20
Northern Ireland	57	19	25	13	8	18	30	+12	-27
Urban	67	20	32	26	21	34	42	+8	-25
Rural	43	8	19	11	8	14	19	+5	-24
16-34	72	25	42	31	23	45	50	+5	-22
35-54	58	17	26	20	17	25	32	+7	-26
55-75	58	12	25	20	16	23	35	+12	-23

Men	63	21	33	24	19	33	40	+7	-23
Women	63	16	29	23	18	29	38	+9	-25
People with a disability	61	18	28	23	20	34	40	+6	-21
Ethnic minority groups	75	32	53	39	38	49	59	+10	-16
Working full/part-time	61	18	32	23	19	30	39	+9	-22
Low income household	63	27	37	29	26	34	45	+11	-18
Don’t own a car/bicycle	89	38	52	49	44	60	70	+10	-19

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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).

* January-March 2020 recall from Wave 1 survey (also asked at Wave 6)

Table C.8: % travelled by train during the last 4 weeks* – selected groups and geographies
(across whole of UK unless stated otherwise) (highlighted +/- indicates statistically significant change)

	January-March 2020*	Apr/May 2020	June/July 2020	Nov/Dec 2020	February/ March 2021	May/June 2021	November 2021	+/- Change: May/June 2021 – Nov 2021	+/- Change: Jan-March 2020 – Nov 2021
All UK	63	12	26	13	10	21	32	+11	-31
England	64	12	26	14	10	23	33	+10	-31
Scotland	64	9	12	12	6	15	31	+16	-33
Wales	52	7	12	10	5	12	19	+7	-33
Northern Ireland	47	9	11	4	4	7	17	+10	-30
Urban	66	12	27	15	10	22	32	+10	-34
Rural	48	4	17	6	6	11	20	+9	-28
16-34	73	19	38	23	16	38	47	+9	-26
35-54	59	10	20	10	8	15	27	+12	-32
55-75	55	6	19	6	5	10	20	+10	-35

Men	62	14	29	16	11	24	32	+8	-30
Women	63	9	22	11	9	18	31	+13	-32
People with a disability	57	10	22	11	9	19	30	+11	-27
Ethnic minority groups	71	24	45	13	21	40	49	+9	-22
Working full/part-time	65	13	18	15	11	24	37	+13	-28
Low income household	56	14	18	14	11	14	28	+14	-28
Don’t own a car/bicycle	72	14	34	20	13	28	41	+13	-31

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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).

* January-March 2020 recall from Wave 1 survey (also asked at Wave 6).

Table C.9: % travelled by underground/metro during the last 4 weeks* – selected groups and geographies
(across whole of UK unless stated otherwise) (highlighted +/- indicates statistically significant change)

	January-March 2020*	Apr/May 2020	June/July 2020	Nov/Dec 2020	February/ March 2021	May/June 2021	November 2021	+/- Change: May/June 2021 – Nov 2021	+/- Change: Jan-March 2020 – Nov 2021
All UK	40	9	19	10	6	14	20	+6	-20
London	84	19	44	40	26	52	67	+15	-17
North East England	50	11	23	9	4	18	26	+8	-24
Urban	42	9	21	11	7	15	20	+5	-22
Rural	28	3	10	2	2	4	8	+4	-20
16-34	50	16	31	16	9	25	30	+5	-20
35-54	38	7	14	8	6	11	18	+7	-20
55-75	32	4	13	4	4	6	12	+6	-20
Men	41	11	21	11	7	15	20	+5	-21
Women	40	7	17	8	5	12	19	+7	-21

People with a disability	35	8	16	8	7	13	16	+3	-19
Ethnic minority groups	60	20	39	30	19	35	46	+11	-14
Working full/part-time	44	10	22	12	8	17	26	+9	-18
Low income household	32	9	20	6	5	7	17	+10	-15
Don’t own a car/bicycle	45	8	22	14	8	18	27	+9	-18

Source: Ipsos MORI/DfT; Base: 4,163 UK adults, 4-29 November 2021 (Wave 6); 4,700 UK adults, 17 May-8 June 2021 (Wave 5); 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).
* January-March 2020 recall from Wave 1 survey (also asked at Wave 6).

Appendix D – Changes between May/June 2021 and November 2021 in the frequency of using transport modes

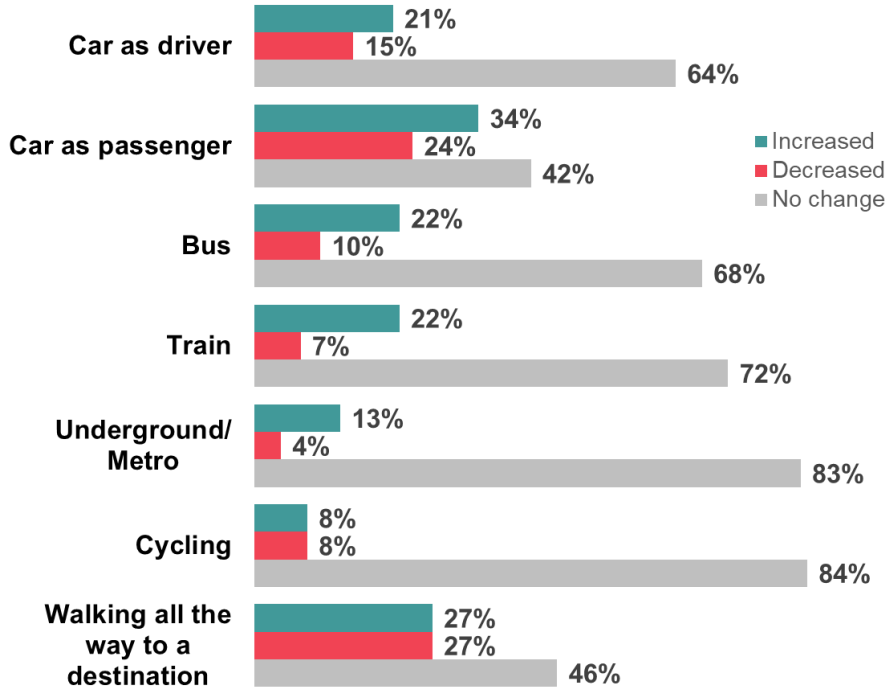
Figure D1 shows that the majority of the longitudinal group - respondents who took part in both the May/June 2021 and November 2021 surveys (waves 5 and 6) - did *not* change how often they travelled by the different modes with the exception of walking all the way to a destination and travelling by car as a passenger; in both cases, a majority of the cohort either increased or decreased the frequency they travelled this way during the period.

This analysis allows us to understand individual-level change but does not capture the extent of changes in frequency for example, there will have been some modest changes in frequency for some of the cohort, and more significant change for others. Moreover, some of the cohort included within the 'no change' category will have been habitual non-users of a mode – e.g. those who did not travel by bus at all in May/June 2021 and again in November 2021.

Travel by car

Just under two-thirds, 64%, of the longitudinal group did *not* change how often they travelled as a car driver between May/June 2021 and November 2021 however, just over one in five (21%) increased how often they travelled this way while 15% decreased the frequency they did this. By comparison, car passenger travel changed more substantially; nearly a third (34%) increased how often they travelled this way while frequency decreased for 24%.

Figure D1: Frequency of travel by selected modes among the longitudinal cohort – November 2021 vs. May/June 2021



Source: Ipsos MORI/DfT; Base: 2,720 UK adults who participated in Wave 5 (17 May-8 June 2021) and Wave 6 (4-29 November 2021)

As at previous waves of *All change?* when we have compared frequency with previous periods (wave-on-wave), older people were the most likely age group to have increased how often they drove a car between May/June 2021 and November 2021. Nearly a quarter (23%) of those aged between 55-75 increased the frequency they drove a car during this period. A similar proportion of those in higher social grade households (23%) also increased the frequency they drove compared with 18% of those in other households.[14]

Changes in the frequency of travelling by car were less pronounced where there was higher dependency on car use. For example, 82% of those living in Northern Ireland did not change the frequency they drove a car - compared with 64% across the UK as a whole.

There were no significant differences in changes to the frequency of driving by car (for any reason) between May/June 2021 and November 2021 between those who drove a car to a place of work 1-2-days per week before the pandemic and those who did this on 3 or more days a week. However, those who commuted to a place of work 3 or more days a week before the pandemic, were more likely than average to have driven to work less frequently in November 2021 compared to May/June 2021. They drove less frequently to work in May/June 2021 compared to the pre-pandemic period and, again, in November 2021.

Those from ethnic minority backgrounds were most likely to have increased the frequency they travelled as a car passenger; 45% did this compared with 32% of other groups – and to have travelled less frequently this way (24% compared with 21%). Women were more likely than men to have travelled as a car passenger less frequently (27% compared with 21%).

Public transport

Just over one in five, 22%, of the longitudinal group increased how often they travelled by train between May/June 2021 and November 2021 while 7% did this less often, and 72% did not change the frequency they did this. The increase in the frequency of travelling by train over this period was larger than the equivalent 13% increase between February/March 2021 and May/June 2021.

Among the longitudinal cohort, younger age groups were most likely to have increased how frequently they travelled by train between May/June 2021 and November 2021; this increased for 27% of 16-34-year-olds compared with 22% of 35-54-year-olds and 16% of those aged 55-75.

Higher social grade households were more likely to have travelled by train more frequently compared to others (24% compared to 17%) as were those from ethnic minority backgrounds (31% compared to 20% among other groups). However, this group was also

[14] These classifications are based on the occupation of the Chief Income Earner in the household. Higher social grades include ABC1 grades (managers, professionals, administration/clerical), lower social grades are C2DE (skilled and unskilled manual/long-term dependent on state benefit).

more likely to have decreased the frequency they travelled by train (15% compared to 5%).

Those who commuted to work 1-2 days per week before the pandemic were more likely to have travelled by train more frequently over this period compared to those who commuted 3-5 days per week (32% compared to 23%) while increased frequency was also above average among those living in London (35%), the North West (25%) and South East (25%) of England.

Overall, the frequency of bus use increased for 22% of our group between May/June 2021 and November 2021, double the 10% whose frequency of use decreased, with 'no change' for 68%. In contrast to the frequency of travelling by train, an increase in the frequency of travelling by bus was more prevalent among older age groups; frequency increased among 24% of 55-75-year-olds compared with 22% among all ages.

Higher social grade households were also more likely than others to have increased how often they used the bus during November 2021 compared to May/June 2021; this increased for 24% of this group. Frequency increased most in London (34%) and urban areas (23% compared to 16% in rural areas). However, there were also larger decreases in the frequency of bus use in London and other urban areas.

Women were more likely than men to have decreased how often they travelled by bus during the period - 12% compared with 9% of men - as were ethnic minorities (24% compared to 8% among other groups).

Active travel

An equal proportion of our cohort increased how often they walked or wheeled all the way to a destination between May/June 2021 and November 2021 as decreased how often they did this (both 27%). There was 'no change' for just under half (46%). There was a similar pattern for cycling; 8% increased and 8% decreased how often they travelled this way but, compared to walking, a much larger proportion - 84% - did not change how often they cycled.

Younger age groups were most likely to have decreased the frequency they walked/wheeled all the way to a destination; a third (33%) did this compared with a quarter (25%) of 35-54-year-olds and those aged 55-75 (24%). There were also decreases among higher social grade households; three in ten (29%) compared with 23% of other households. Decreases were also more prevalent in London and the West Midlands; 36% in both places compared with 27% overall.

Men were more likely than women to have both increased how often they cycled between May/June 2021 and November 2021 (12% compared to 5%) and decreased the frequency they travelled this way (10% compared with 6%). Younger people were also more likely than older age groups to have changed the frequency they cycled over this period; frequency increased for 15% (compared with 8% among all age groups) and decreased for

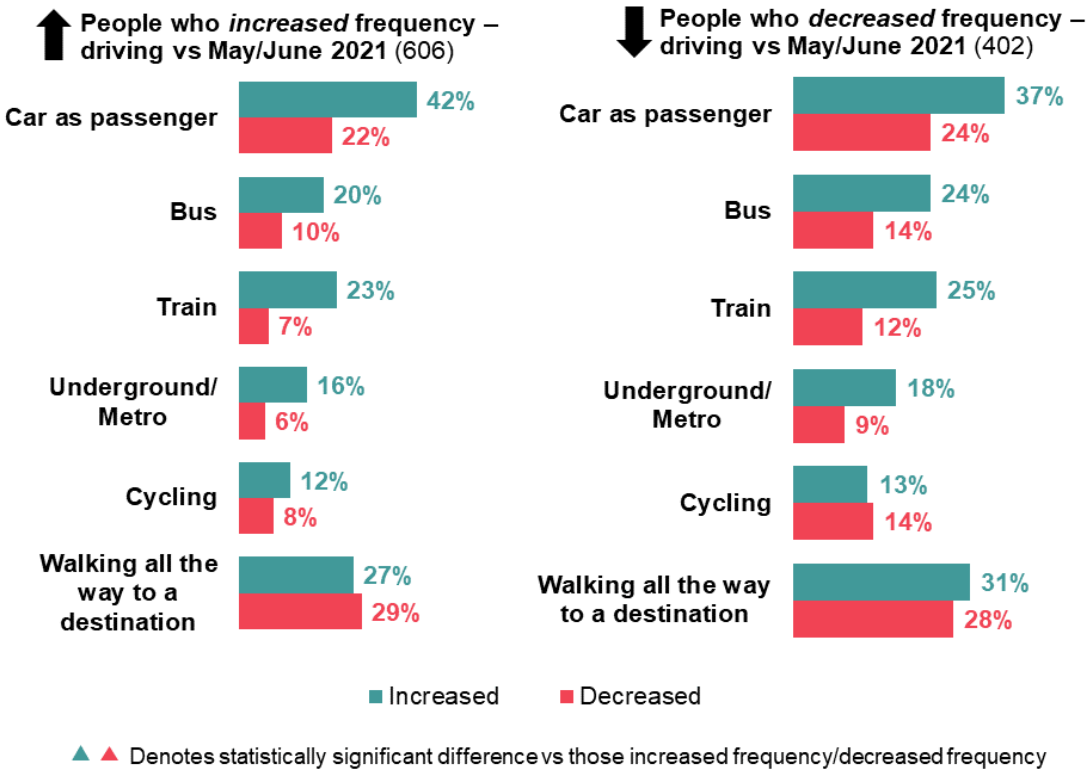
10% (also 8% overall). An increase in the frequency of cycling occurred to a higher degree among lower social grade households; 12% compared with 7% in other households.

A higher proportion increased the frequency they cycled in the East of England - 14% compared with 8% across the UK - while the largest decrease was in the West Midlands 15% compared with 8%.

Figure D1 shows changes in the frequency of using modes between May/June 2021 and November 2021 for individuals who changed how often they travelled by driving a car. Those who increased how often they travelled this way (on the left-hand side of the figure) were also more likely to have increased, rather than decreased, the frequency they used other transport modes during this period (the exception being walking/wheeling all the way to a destination). People who decreased how often they drove (on the right-hand side) were also more likely to have increased than decreased the frequency they used other modes of transport.

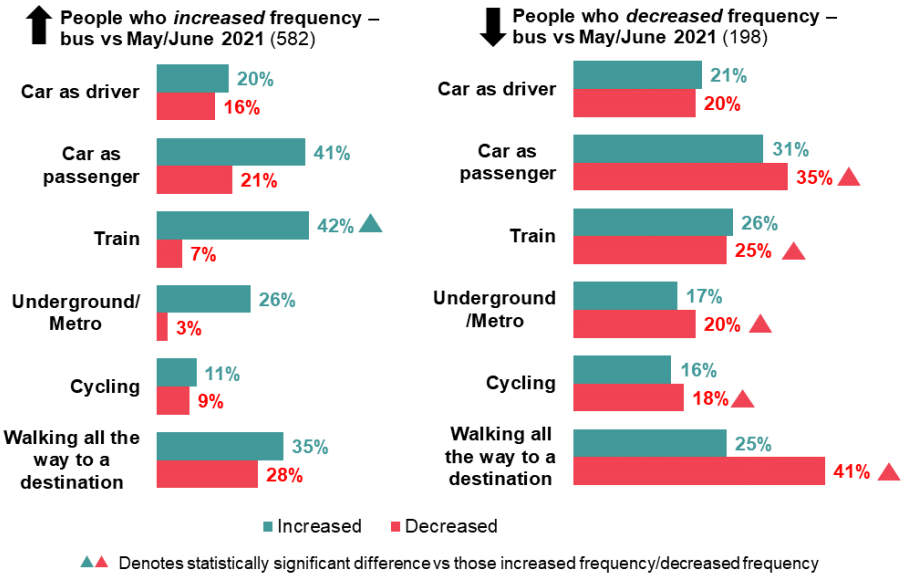
People who had increased how often they travelled by bus between May/June 2021 and November 2021 (on the left-hand side of the Figure D2) were also likely to have increased how often they used other modes of transport as well (with the exception of walking). However, the association between modes for those who reduced their bus use (on the right-hand side of Figure D3) was more mixed. For example, 35% also reduced car passenger travel (31% increased this) while 25% reduced the frequency they travelled by train (26% increased this) and 41% reduced how often they walked (25% increased this).

Figure D2: Mode increase/decrease among those who increased/decreased driving a car – May/June 2021 vs. November 2021



Source: Ipsos MORI/DfT; Base: 2,720 UK adults who participated in Wave 5 (17 May-8 June 2021) and Wave 6 (4-29 November 2021)

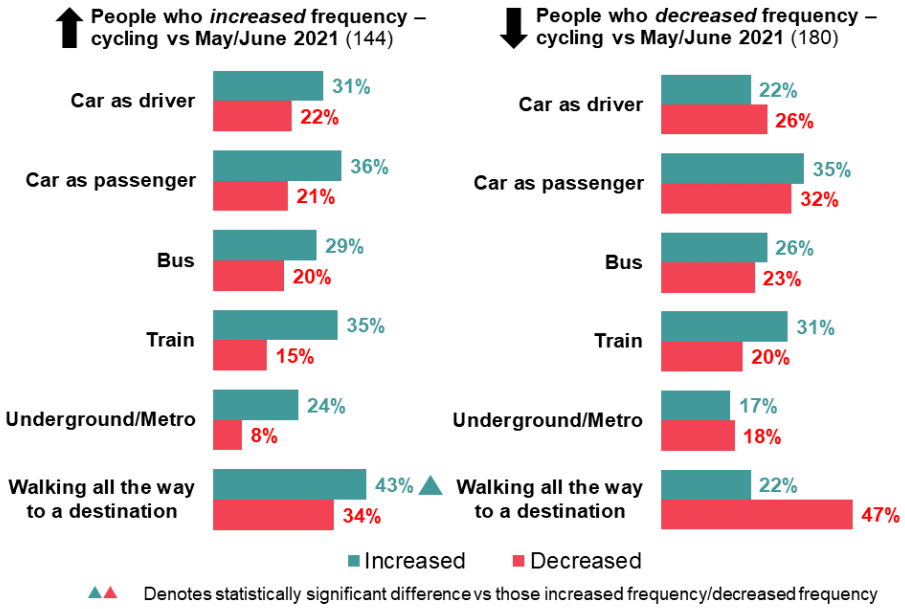
Figure D3: Mode increase/decrease among those who increased/decreased bus use – May/June 2021 vs. November 2021



Source: Ipsos MORI/DfT; Base: 2,720 UK adults who participated in Wave 5 (17 May-8 June 2021) and Wave 6 (4-29 November 2021)

Figure D4 summarises changes in the frequency of cycling between May/June 2021 and November 2021. As with other modes, those who increased how often they cycled during this period were also more likely to have increased how often they travelled in other ways as well. Most notably, 43% of those whose frequency of cycling increased, also walked or wheeled all the way to a destination more often; this was significantly higher than the incidence of this behaviour among those who cycled less frequently (22%).

Figure D4: Mode increase/decrease among those who increased/decreased cycling – May/June 2021 vs. November 2021



Source: Ipsos MORI/DfT; Base: 2,720 UK adults who participated in Wave 5 (17 May-8 June 2021) and Wave 6 (4-29 November 2021)

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