

# *All change?* **Part 2**

**Qualitative report Autumn 2021**

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Paul Carroll  
Holly Day  
Adam Behailu





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# Executive Summary

## Overview of approach

As part of the *All change?* study, Ipsos MORI conducted 10 online focus groups and 15 in-depth qualitative interviews exploring how a range of people in England made decisions about travelling.

Fieldwork took place between the 8th November and the 7th December 2021. These groups and interviews were qualitative with participants recruited via free-find methods and were designed to supplement the findings of the sixth and final survey within the *All change?* research programme.

Please note that the bulk of the fieldwork took place before the emergence of the Omicron variant, thus only a small number of the in-depth interviews captured rising concern about the implications for public health and travel guidance.

## Key research findings

### What's changed?

- There was an increase in journeys made for commuting and leisure travel upon the recent lifting of national Covid-19 restrictions between May and November 2021.
- Public transport – an enclosed space for lengthy periods without the ability to easily leave – was regarded as a less safe environment than other public settings.
- The pandemic has made people feel less accepting of heavy traffic and overcrowding, as well as heightened perceptions of what makes for unhygienic, enclosed spaces.
- Experiences with quieter, less crowded services and quieter roads during the pandemic may have shifted perceptions of what “good” (or, even, “acceptable”) looks like.
- Participants described being more selective about the types of journeys they made and the modes of transport they used as a result of the pandemic. In particular, personal cars or taxis were seen as more Covid-secure, more convenient, and more comfortable.

### Hybrid working and flexibility

- While there hadn't been a mass return to commuting, participants discussed how they had *begun* to return to work and commuting with varying frequency throughout the pandemic.
- For those who had returned to public transport, they felt safe, either wanted to or were required by employers to return to workplaces to some extent, and were happier with the travelling experience during quieter periods.

- For those who had not returned to public transport use for commuting, their employer had allowed them the choice and flexibility, there was unease around safety and hygiene (relating to Covid-19 as well as other issues) or they found different ways of travelling (by car or walking/cycling).
- There was a strong preference for hybrid working to remain in place, with a mix of working from home and commuting, enabling flexibility and autonomy in working patterns. Participants valued the mix of productive home-working and face-to-face time with colleagues.
- However, the ability to do this varied dependent on sector and employer guidance which has often changed – and continues to change – as the pandemic remains in flux.
- Flexibility in travel patterns and mode of transport was particularly limited for those in rural areas (due to limited local services) and those with childcare responsibilities (in part due to journey times being anchored to school times).

### Active and sustainable travel

- Since the pandemic began, participants described being more open to walking and / or cycling, especially as a means to help combat climate change and for shorter distances or local journeys.
- Key enablers for the uptake of walking and cycling included: the national Covid-19 lockdown restrictions; the (sometimes surprising) convenience of being able to walk from one's doorstep to local amenities; and the closure of gyms, which motivated participants to seek alternative forms of exercise.
- Perceptions of the quality and safety of infrastructure was important for participants' decisions to walk or cycle – there were numerous safety concerns associated with the uptake of walking and cycling.
- Cold winters, darker nights and changing work patterns could all potentially impact continued use of active travel modes.
- Consequently, there remained some uncertainty among participants about whether their adoption of walking and / or cycling would remain permanent, particularly if traffic levels were to increase or return to pre-pandemic levels.
- There were cases of the hybridisation of journeys, where participants had adopted multiple modes of transport for their journeys, with at least one transport mode being active / sustainable.

### The future

- The future of commuting and individual level travel behaviours remain in flux while uncertainty and changes to routines continue. Indeed, the context of Omicron

concern meant that participants were wary of further guidance changes and to their current routines.

- Commuting habits now tended to fit around personal lives, families, and hobbies, rather than vice versa.
- Participants had time to consider the amount of time and money saved when not commuting, and the possibilities with that saved time and money. This also included considering getting rid of cars in favour of public transport, active travel, or electric vehicles given upcoming regulations and environmental implications.
- Based on participants' preferences and expectations, the conventional five-day commute, as it once was, looks very unlikely to be a part of the "new normal". Yet what hybrid working and travel patterns will look like is yet to be settled given the interplay of shifting employer demands, employee desires, and a pandemic that is yet to run its course.

# Background and methodology

## Research Objectives

Ipsos MORI were commissioned by DfT to carry out a programme of qualitative research relating to changing travel and commuting behaviours, to complement the sixth and final wave of the longitudinal *All change?* Survey (which will be referenced throughout). There was a particular focus on how and why people may or may not have been returning to public transport or changing their transport mode and frequency at various stages throughout the pandemic, and the reasons driving these behaviours. The key research objectives for this programme were:

- Why are/aren't people returning to public transport (PT), and rail in particular?
- How and why are people changing how they travel to work?
- What are people's future intentions, for Jan-Mar 2022 and in 12 months' time?
- What are people's attitudes and behaviours relating to sustainable travel (public transport and active travel)?

## Methodology

The qualitative approach comprised ten online focus groups, designed to bring together groups of different types of transport users from across England to share and discuss their experiences of travelling over the past 18 months. These groups were segmented by transport mode, frequency of current commute, commuting length, urbanity and quotas on active travel (as shown in Table 1.1 below).

In addition to the focus groups, in-depth interviews with people in employment from across the country were conducted to supplement qualitative findings, and better understand individual experiences of how behaviour and attitudes to travel had changed since the pandemic began. This report also makes reference to quantitative findings from Wave 6 of the *All change?* series of surveys; which can be found here:

<https://www.gov.uk/government/publications/covid-19-travel-behaviour-during-the-lockdown>

## Online focus groups

Participants were recruited through free-find on-street and telephone recruitment via an external recruitment partner. For each 90-minute discussion, seven participants were recruited, with between five and seven in attendance across the groups. Conversations with participants were structured by a discussion guide covering several topics reflecting the project objectives. All groups were conducted online using Zoom and recorded for notetaking purposes with the consent of participants. Fieldwork was conducted between 11<sup>th</sup> November and 25<sup>th</sup> November 2021.

Groups were recruited with targets to achieve a mix of standard demographics such as gender, age, ethnicity and SEG, with each group representing a combination of two

English regions (for ease of recruitment). Quotas were set on parents of school aged children, and various commuting behaviours as shown in Table 1.1 below.

**Table 1.1: Focus group sampling**

Group	Travel behaviours
1	Rail commuters, already back to work, long distance commute & regular use
2	Rail commuters, already back to work, short distance commute & regular use
3	Rail commuters, already back to work, long distance commute & less regular use
4	Rail commuters, already back to work, short distance commute and less regular use
5	Reliant on public transport, back to work
6	Reliant on public transport, not back to work
7	Not back to work, not reliant on public transport, urban
8	Not back to work, not reliant on public transport, suburban/rural
9	Increase in active travel for commute
10	Increase in active travel for leisure

### In-depth interviews

The in-depth interviews were conducted by phone or over MS Teams, each lasting around 45 minutes using a discussion guide developed by our researchers. The 15 participants were recruited by free-find methods, with targets to achieve a mix of standard demographics such as age, gender, ethnicity, region, urbanity, and SEG. Quotas were set on parents of school children, employment, commuting frequency pre-pandemic and present, length of commute, and mode switching (table 1.2).

**Table 1.2: Depth interview sampling**

	Quota set	Commuting behaviour
1	X5 participants	mode switchers, who have returned to commuting
2	X5 participants	mode switchers, who have not returned to commuting
3	X5 participants	commuters who previously used public transport or active travel but no longer do so

### Context

The fieldwork period began on 8<sup>th</sup> November, ending a month later on 7<sup>th</sup> December. During this period, there were contextual factors concerning Covid-19 developments within the UK that may have impacted upon the responses and experiences of participants, such



as the emergence of the Omicron variant and changes in guidance on testing, face coverings, and travel.

The timeline below illustrates these developments alongside the timing of qualitative fieldwork:

**Table 1.3: Project timeline**

Date	Event	Description
14 September	Covid-19 Winter Plan	Prime Minister Boris Johnson and Health Secretary Sajid Javid introduce the Covid-19 Winter Plan for England, which includes a Plan A and a Plan B scheme.
16 September	Covid-19 Booster Vaccine	Covid-19 booster vaccination programme commences in England and Wales.
21 October	Covid-19 Cases	The UK records 52,009 new Covid-19 cases, a daily high since 17 July 2021.
29 October	Covid-19 booster vaccine programme	Department of Health and Social Care confirms that 7 million have received their booster vaccine since launch.
7 November	Covid-19 booster vaccine	More than 10 million people in the UK received their 3 <sup>rd</sup> dose of the Covid-19 vaccine.
8 November	<i>All change?</i> Qualitative Final Round	Start of fieldwork for focus groups.
9 November	Covid-19 vaccination	Health Secretary Sajid Javid confirms that frontline NHS staff in England must have both doses of the Covid-19 vaccine, with the deadline set for April 2022.
15 November	<i>All change?</i> Qualitative Final Round	Start of fieldwork for depth interviews.
22 November	Covid-19 booster vaccination	Those aged over 40 in England become eligible for their Covid-19 booster vaccination.
22 November	<i>All change?</i> Qualitative Final Round	End of fieldwork for focus groups.

25 November	New variant of concern	The Omicron variant was identified in South Africa and detected in countries around the world, including the UK.
29 November	Wave 6 survey	Completion of survey fieldwork.
30 November	Covid-19 rules	Face coverings in England and PCR tests for travellers arriving in the UK become mandatory.
3 December	New variant of concern	Confirmed Omicron cases in the UK exceeds 100.
5 December	New variant of concern	246 confirmed cases of Omicron in the UK.
6 December	New variant of concern	Health Secretary Sajid Javid confirms cases of Omicron in several communities across England, with the total UK cases rising to 336.
7 December	<i>All change?</i> Qualitative Final Round	End of fieldwork for depth interviews.
10 December	Plan B	Legal requirement to wear face masks in shops and on public transport extended to most other public venues such as cinemas and shops.
13 December	Plan B	People again urged by the government to work from home if they can.

## Reading this report

Qualitative research is illustrative, detailed, and exploratory. It offers insight into the perceptions, feelings, and behaviours of people. Evidence in this report is based on participants' perceptions. It is important to remember that even though some perceptions may not be factually accurate, they represent "the truth" to the participants and, as such, are vital in understanding their attitudes and views. The data presented here is intended to demonstrate the range and diversity of the views and experiences of the target sample, and not to be a statistically representative sample of the wider population.

At the beginning of each chapter there is a brief summary of the key findings. Throughout, we have referred to participants and provided supporting evidence through verbatim comments, which have not been directly attributed in order to protect anonymity.

# What's changed?

## Summary

- There was an increase in journeys made for commuting and leisure travel upon the recent lifting of national Covid 19 restrictions.
- Public transport was regarded as a less safe environment than other public settings, due to being in an enclosed space for often lengthy periods without the ability to easily leave.
- The pandemic has caused people to suggest they have a lower tolerance of heavy traffic and over crowding, as well as heightened perceptions of what makes for unhygienic, enclosed spaces.
- Experiences with quieter, less crowded services during the pandemic may have shifted perceptions of what “good” (or, even, “acceptable”) looks like.
- Participants described being more selective about the types of journeys they make and the modes of transport they are using post pandemic.
- In particular, personal cars or taxis seen as more Covid secure, more convenient, and more comfortable.

During the second half of 2021, there was an increase in travel across modes including public transport and personal vehicles. Alongside this, there has also been a change in what people deem to be acceptable when travelling, particularly when it comes to levels of traffic, tolerance of overcrowding, and perceptions of poor hygiene.

## Recent increase in journeys

The sixth *All change?* survey found that, as restrictions were lifted, there were more opportunities to travel and usage of public transport and some private modes (taxis and travelling by car as a passenger) increased significantly between May/June 2021 and November 2021 (although usage levels were behind those pre-pandemic). During this period, there were significant increases in travel to visit friends/ relatives, to meet up with people and to go out. On average, people travelled for five different reasons (selected from a list of 16) during November 2021, up from four in May/June 2021. In November, four in ten, 40%, said that they had changed the way they have made some journeys compared to before the pandemic including the use of different modes of transport.

The qualitative *All change?* findings suggest subtle changes to the types of journeys that the public made, especially at an individual level. Across the focus groups and in-depth interviews, participants told us how their personal and working circumstances influenced their changing travel patterns. Individual level changes included differences in transport modes for leisure travel and commuting, journey times, childcare duties, and whether participants worked from home, commuted, or had a mix of the two.

While discussing changes to their travel habits, participants shared a range of reasons behind their decision on whether or not to return to public transport. They reflected on their use of public transport compared to being in other public settings such as a cinema or

supermarket. Those who remained cautious about returning to public transport said that the lack of space in overcrowded buses and trains made them feel less able to remove themselves from the environment – and there was a distinct concern that levels of crowding felt as if they were approaching pre-pandemic levels. In this instance, participants felt that they were less able to socially distance, particularly from those not wearing masks, as they would do in other public spaces.

***“(I’ve) been uncomfortable about going out and being social, people don’t wear masks, and on a train you’re stuck and restricted and can’t avoid it.”***

*Rail commuters, already back to work, long distance commute & regular use, Focus Group 1*

The perceived lack of cleanliness of buses and trains compared to other public settings such as cinemas was another concern among participants using public transport in November 2021 as well as those not using it at that time – e.g. dirty windows and seats, as well as the amount of litter. Trains and buses were considered unhygienic, with little visible evidence of cleaning or sanitation measures to counter the risk of Covid-19 infection. This further emphasised that messaging about the importance of sanitation and cleaning of surfaces means these remain key factors in how the public assess their own risk.

***“I don’t imagine [public transport] it being particularly sanitised or Covid-friendly.”***

*Not back to work, not reliant on public transport, suburban/rural, Focus Group 8*

In contrast, those who had returned to public transport 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.

***“I’m a lot happier now I’ve been vaccinated so I feel a lot happier about going on the bus.”***

*Reliant on public transport, not back to work, Focus Group 6*

## **Changes in passenger tolerance**

Perceptions of what “good” travel looks like also appeared to have changed because of the pandemic. 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. As a result, participants discussed how they had become less accepting of travelling on crowded public transport, and began to associate “good” travel with fewer passengers and more space.

As restrictions eased at various points and more commuters returned to work, participants expressed their frustration with the return of rush hour crowds to public transport. Advice throughout the pandemic heightened public awareness of the increased risks of virus transmission in crowded and enclosed spaces, which also impacted perceptions of tolerable commuting conditions.

***“You were absolutely happy to get on the Tube in packed circumstances, but government restrictions raised more awareness of being surrounded by people and what you can catch [from them].”***

*Rail commuters, already back to work, short distance commute & regular use, Focus Group 2*

Car drivers also reflected on changes in traffic levels throughout the pandemic, particularly during the first national lockdown in March 2020 where there was very little traffic on the roads. The experience of driving on almost empty roads was a new experience for drivers who were used to high levels of traffic during commuting hours. They had enjoyed driving much more as a result, and the return to “normal” traffic levels as restrictions were lifted was met with frustration, prompting drivers to reassess what they felt was an acceptable level of traffic.

***“There was less traffic in lockdown, so when I was out and about driving it was actually quite nice.”***

*Mode switcher from the tube to walking/cycling for leisure travel, not returned to commuting, Interview 7*

Despite traffic levels returning following the easing of restrictions, those who used their car more frequently for commuting or leisure purposes felt that this mode of transport was more comfortable, Covid-19-secure, and reliable than public transport. Similarly, taxis were deemed to be a more convenient alternative to public transport, with shorter waiting times coupled with the safety and convenience of point-to-point transportation. The reduced waiting times for taxis was particularly a relief for those travelling at night or in the colder winter months. It was therefore suggested that taking taxis rather than public transport for journeys became a “treat”. Given the money saved from not having to regularly commute during lockdowns or spend on other things, the cost of a taxi journey compared with other modes, combined with the convenience, was deemed to be a more acceptable outlay.

***“[I am] treating myself to more taxis, rather than getting the bus, to avoid being out in the cold.”***

*Rail commuters, already back to work, short distance commute & regular use, Focus Group 2*

Taxis were also perceived to be a more Covid-secure means of travelling, given passenger numbers were restricted, there would be a driver with a face covering, and often a dividing screen between driver and passenger. Participants also became more familiar and comfortable with trusted local providers.

***“I feel safe in taxis - the taxis I use I’m quite familiar with and they’re quite known, they have trackers on. It’s convenience really, when taking a taxi.”***

*Commuter, previously used public transport/active travel but no longer does, Interview 15*

# Hybrid working and flexibility

## Summary

- While there hasn't been a mass return to commuting, participants discussed how they had begun to return to work and commuting.
- There was a strong preference for hybrid working to remain in place, with a mix of working from home and commuting, enabling employee choice and flexibility in working patterns.
- Participants valued the mix of productive home working and face to face time with colleagues.
- However, the ability to do this varied dependent on sector and employer guidance which has often changed as the pandemic remains in flux.
- Flexibility in travel patterns and mode of transport is particularly limited for those in rural areas and those with childcare responsibilities.

## Hybrid working

The experience of hybrid working during the pandemic (a first for some), gave participants the opportunity to work in a way that struck a better work/life balance. They 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. This balance enabled increased productivity, with the time saved by not commuting while still providing some form of routine and opportunity for interaction.

***“I find that working from home full time I'd get more admin tasks done, but in terms of being creative / collaborating with people I prefer going into office. I'd rather 2 days office, 3 days at home.”***

*Rail commuters, already back to work, short distance commute & regular use, Focus Group 2*

Flexibility also extended to choosing which days to work from home and which to travel to work. Participants said that they had more flexibility in the times that they could wake up in the mornings when home-working, to prepare for work, or to do other things such as do the school-run in good time.

***“I prefer working from home to save time when you don't have to commute.”***

*Rail commuters, already back to work, short distance commute & regular use, Focus Group 2*

While offering a degree of flexibility to working patterns, there were further pros and cons attributed to hybrid working. Associated cons included the lack of a fixed working routine, reduced opportunities for socialising with work colleagues, missing out on in person training at the office, and the feeling of staying indoors at home for too long. Alternative pros attached to hybrid working encompassed the feeling of being more relaxed after not having to rush for a full-time commute, flexibility for employees to choose the days to commute and working from home, and saving on travel costs.



Despite experiencing hybrid working first-hand, such working arrangements remain in flux for workers. Working patterns evolved over the course of the pandemic where the days per week of working from home and commuting continued to change. Hybrid working patterns would also change if workers felt the need to commute at a certain time point to complete particular tasks or to work in-person with colleagues.

### **Mode switching behaviours and the return to commuting**

As restrictions were eased throughout the year, people described returning to work and their commute. Reflecting on shifting work routines, participants discussed changes to their usual modes of transport, while others told us that they had reverted to their pre-pandemic travel habits. For example, participants who worked from home took up walking for leisure during lunchtime and / or work as an opportunity to change scenery while getting out of the house.

***“I started doing a walk at lunchtime, because I wasn’t even going out at lunchtime.”***

*Mode switcher, not returned to commuting, Interview 6*

For those who reverted to their pre-pandemic commute having trialled healthier or more sustainable alternatives, this came down to convenience, time savings, and moving into winter. One commuter reverted to using the tram rather than walking to work due to the onset of cold weather and length of time they were willing to spend travelling.

***“I get the tram now particularly cos it’s winter, I’ll do the twenty-minute tram ride rather than the hour and a quarter walk, the weather’s changed, there’s more traffic and there’s less free time cos there’s more to do now.”***

*Increase in active travel for leisure, Focus Group 10*

Survey findings similarly suggested an increase in travelling to work - and greater frequency of doing this – in November 2021 compared to May/June 2021, but there hasn’t been a ‘mass’ return to commuting. Just over a quarter, 27%, of those in employment said that they didn’t make a journey into the office during May/June 2021, and this dropped to a fifth, 20%, in November after restrictions were fully lifted. During the same period, the proportion travelling into work five days a week or more often increased but only modestly from 28% to 32%. This aggregate picture might mask variation in behaviour – people changing their commuting patterns over time and depending on personal circumstances – as suggested by the qualitative research.

## Case study switching to regular car use

- This participant commuted to work 5 days a week prior to the pandemic but has now switched to 3 4 days a week. They also switched from taking the bus and train to using the car for their commute.
- They decided to try something new for their commute by switching to car because of their concerns of contracting Covid 19 when using public transport.
- Travelling to work by car has saved a considerable amount of money compared to using the bus and train 5 days a week pre pandemic.
- Travelling by car has also saved them journey time on their commute. Their journey initially took an hour and a half each way when taking public transport as they had to walk half a mile for the buses which sometimes did not turn up and then get on the train. When using their car for the whole commute, however, their journey time was reduced to half an hour.
- Being in the car has also reduced anxiety over contracting Covid 19 and the risk of being subject to crime on buses and trains, which made the participant feel less stressed when arriving at work.
- They felt that commuting by car worked for them rather buses or trains, therefore they planned to continue using their car for commuting into work 3 4 days a week.

## Constraints on flexibility

Despite the flexibility associated with hybrid working, there were notable instances of travel patterns and routines remaining the same as prior to the start of the pandemic. Constraints on flexibility included: perceived poor reliability of public transport in rural areas, cost of public transport, and parental responsibilities. These constraints limited the choice of transport modes or the ability of individuals to take advantage of flexible working patterns

The in-depth interviews highlighted the limited modes of travel available to participants from rural areas. These participants told us about the lack of stops for trains and buses in more rural areas, as well as their lack of reliability, limiting travel options for both commuting and leisure purposes.

***“Trains don’t go to the stops where I need.”***

*Mode switcher, returned to commuting, Interview 4*

Another constraint on flexible journey patterns and routines was the financial cost of public transport, particularly buses and trains. The high costs of public transport in certain cases meant that participants felt they could not afford to use them as an alternative to driving.

***“The cost of [public transport] is almost prohibitive, it’s not an affordable alternative.”***

*Commuter, previously used public transport/active travel but no longer does, Interview 14*

Parents also faced constraints as their journey times remained centred around the morning drop-off and afternoon pick-up of children from school through much of the pandemic. Set school start and finish times limited options for how and when to travel.



They explained that using the car was much easier for point-to-point travel during these times, and was easier than taking children on public transport. Parents also described running errands such as shopping at these times, as they knew they would already be using the car, thus making things convenient. If they took their children to school using the car, they would then continue the drive to work, particularly if school was already on the way.

***“The car is all panned out and worked out, I know what time I got to get the girls to leave to get to school, know what time I have to get to work.”***

*Commuter, previously used public transport/active travel but no longer does, Interview 11*

### **Case study switching to regular car use**

- This participant has used the car much more since the pandemic began due mainly to safety concerns with trains and buses and is still commuting to work 5 days a week or more
- They live in the suburban South West and have a long commute, with the children going to school locally
- They acknowledged transport operators doing what they could to make things safe, but the convenience and privacy of the car was a better option for them and their children.
- The morning school run meant that journeys were anchored around these times, in order to ensure the children arrive on time.
- Consequently, they had only narrow flexibility around working patterns, as these in turn were anchored to school start times.
- Having this set routine with the children also allowed for a routine with work and start times there.
- Previously, they had the worry of potentially missing the train or experiencing delays post school run when commuted by train.
- Car for the whole set of journeys offers convenience of door to door, reliability, control and is less stressful.
- They felt they would need significant reassurance to return to train given how easy and stress free doing all trips in the car has been for the whole family.

# Active and sustainable travel

## Summary

- The public are open to walking and / or cycling more, especially those who viewed this as a means to help combat climate change.
- There remains a lack of certainty among participants about whether their adoption of walking and / or cycling will remain permanent.
- Key enablers for the uptake of walking and cycling include: the national Covid 19 lockdown restrictions; the (sometimes surprising) convenience of being able to walk from one's doorstep to local amenities; and the closure of gyms, which motivated participants to seek alternative forms of exercise.
- Perceptions of the quality and safety of infrastructure was important for participants decisions to walk or cycle – there were numerous safety concerns associated with the uptake of walking and cycling.
- There were cases of the hybridisation of journeys, where participants have adopted multiple modes of transport for their journeys, with at least one transport mode being active / sustainable.

During the course of fieldwork, there was a noticeable rise in public concern about the environment. And, across the pandemic, it was clear that people had at least tried out new ways of getting about, whether influenced by the various lockdowns or, once restrictions eased, their concerns about the safety and reliability of different modes.

## Context

Shortly before the COP26 climate conference in Glasgow, Ipsos MORI's November Issues Index – a monthly survey capturing spontaneous mentions of the most/other important issues facing the country – recorded the highest score for pollution and climate change since 1988 and just the third time it had topped the list of national concerns (the issue fell back during December partly because of the salience of the Omicron variant as an issue before Christmas). *All change?* surveys found that two-thirds considered climate change as serious a crisis as coronavirus as had been the case in the first survey in the series (April/May 2020). As previously, the majority said they wanted to travel sustainably – '56% agreed that 'In future, I am willing to do more walking and/or cycling to reduce my contribution to climate change' – but more expected to return to previous behaviours than don't and the proportion who agreed that in 12 months' time they would 'walk more than I did before the pandemic' fell from 57% in April/May 2020 to 43% in November 2021.

## A new and lasting experience?

The uptake of active travel constituted a new journey experience for participants who had switched to walking and / or cycling for the first time for leisure travel since the start of the pandemic. These switchers felt that walking and / or cycling for leisure gradually became habitual for them since the first lockdown. 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.

***“It was a complete pleasure to have time to do it (walking) and to be able to actually get out and exercise, so we weren’t stuck in doors all day.”***

*Commuter, previously used public transport/active travel but no longer does, Interview 12*

The uptake of walking and / or cycling also became more attractive for those who were more concerned about Covid-19. These modes of travel provided an opportunity to travel outdoors alone or in smaller groups away from mass crowds. The appeal of walking and / or cycling subsequently grew, particularly for participants seeking to make shorter journeys for leisure travel within their local area.

***“[I] walked more around my local area because of Covid.”***

*Rail commuters, already back to work, long distance commute & regular use, Focus Group 1*

Walking became more appealing given the ease of accessing local amenities, green spaces, and socialising on a doorstep. However, there were initial barriers toward walking which included limited fitness, general motivation, and the perceived inconvenience of walking in bad weather. For those who had enjoyed walking more despite having started out of necessity, it became habitual over time or an enjoyable activity for outdoor leisure.

***“[I] started walking while listening to my audiobook, and that got me enjoying walking more, and I tried to keep it up and I got more used to it.”***

*Rail commuters, already back to work, short distance commute & regular use, Focus Group 2*

For those who started to cycle, initial barriers included road safety concerns (i.e. being hit by a car), poor road conditions, lack of cycle lanes, and having to learn how to cycle on roads as a first-time cyclist. This made participants question their motivation to cycle in the longer term. Like walking, however, cycling gradually evolved among those most committed, from being seen as a chore to becoming an enjoyable hobby and routine the more that participants used their bikes. Cycling was seen as an opportunity for exercise and to get out of the house during lockdown when facilities were closed.

***“I’ve been doing a lot more cycling because the gyms were closed.”***

*Rail commuters, already back to work, short distance commute and less regular use, Focus Group 4*

Cycling and walking were also perceived to be beneficial for physical health and mental wellbeing. Participants felt that cycling and walking built up general fitness, especially for those who did not go to a gym or previously exercise regularly. There were further improvements to mental wellbeing as cycling and walking became a more social activity done with friends and

family. For instance, participants recalled how they took up cycling with in-laws and took walks after work with their partners to wind down their day.

Despite the physical and mental health benefits, the longer-term continuation of walking and cycling remains in question. While saying they were hopeful of continuing to walk and cycle permanently, participants expected that cold winters, darker nights, the return to more commuting, and changing work patterns could all potentially make this a temporary situation. There were also self-proclaimed “fair weather cyclists” who preferred to cycle in the spring and summer as opposed to the winter months.

***“I’m a fair weather cyclist, I won’t cycle again till spring.”***

*Commuter, previously used public transport/active travel but no longer does, Interview 14*

There were alternative instances of a more long-term commitment to walking and cycling. In such cases, these participants felt that active travel was a more environmentally friendly way of travelling in the longer-term, especially compared to using the car.

***“If I can cycle or walk somewhere, instead of taking the car, it’s preferable if I can, with the pollution side of things.”***

*Mode switcher, not returned to commuting, Interview 7*

## Case study switching to active travel

- Participant lives in a rural part of the South East and currently works full time entirely from home. They had previously commuted to work earlier on during the pandemic.
- They switched from using the car to cycling and walking for leisure travel, to visit family, and commuting to work.
- This participant borrowed a family member's bike and took up walking during national Covid 19 restrictions as nothing was open and their gym classes were cancelled. Participant also liked being outside in fresh air.
- After enjoying the use of their family member's bike, the participant first bought a second hand bike and then purchased a more expensive version with a lighter frame as their cycling increased.
- Walking and cycling was found to be a quicker alternative to solely driving to work, which was only 2 miles away from their home. Walking and cycling meant that the participant could avoid rush hour traffic on the roads, hence reducing their journey time from the previous 40 minutes that it took by car to arrive at their work during rush hour.
- Enablers included: the installation of showers, lockers, and storage facilities at their workplace when they previously commuted earlier during the pandemic, and new cycle routes on local roads.
- It was difficult for the participant to regularly cycle when they fully worked from home, which meant that they did not have an opportunity to cycle during the day.
- High traffic caused anxiety about safety while cycling, but this was overcome by re routing through quieter and more remote back streets, away from main roads.
- Hoped to be walking 80% and cycling 20% of the time when they return to full time commuting 5 days a week but may use the car occasionally during the wetter/colder days.

## The importance of infrastructure

During their reflections on cycling and walking, participants described how their use and confidence depended on a range of infrastructural factors. Confidence in cycling was notably dependent on the quality of cycle lanes, maintenance of the roads, and traffic rates.

***“Cycle lanes go into city centre, but don't go everywhere. I would have to go over multiple roundabouts and wouldn't feel safe doing so.”***

*Not back to work, not reliant on public transport, urban, Focus Group 7*

The decision to cycle to work also hinged on whether the workplace provided appropriate storage facilities for bikes, as well as showers and changing facilities. The prospect of investment in such facilities by places of work was welcomed and participants felt such initiatives would provide a major encouragement for them to cycle into work.

***“Facilities, we don’t have any showers or anything at work, but we are planning on getting an extension next year – they’re thinking of having showers.”***

*Reliant on public transport, not back to work, Focus Group 6*

## Safety

As well as the existence of infrastructural barriers, safety concerns were perceived to hinder participants’ confidence in adopting active travel. A key concern was walking and cycling in the dark. Participants were particularly fearful for their safety and felt vulnerable when walking during dark nights in remote places. There were also safety concerns associated with walking in streets with a lack of lighting and waiting at bus or tram stops alone in the dark which led to a perception of danger for participants. During the focus groups and depth interviews, the issue of walking in the dark was not particularly associated with post-pandemic times and was rather framed as a more general concern by participants for which they would seek alternative forms of transport.

***“When it’s the darker evening I do walk less, I use transport more cos it’s safer than walking.”***

*Reliant on public transport, back to work, Focus Group 5*

There were further concerns over cycling in traffic within city centres particularly among those new to cycling. Participants who cycled also stressed that the recent increase in traffic on the roads upon the easing of national lockdown restrictions, congestion in city centres and poor cycle lane infrastructure combined to heighten their safety concerns when travelling by bicycle. They were also anxious over the risk of them getting hit by another vehicle while cycling, hence making them feel less inclined to cycle for both leisure travel and returning home from work when roads were more congested. In such cases cyclists were more inclined to take alternative routes through more remote areas outside of a city centre.

***“It’s the traffic itself that poses the biggest danger to cyclists in the city.”***

*Reliant on public transport, not back to work, Focus Group 6*

## Hybridisation of journeys

Travelling has also changed due to more hybridisation, by which two or more different modes of transport are used to make one journey. Such hybridisation encompassed a switch to modes of transport that were not previously used before. As a result, there has been an increase in the incorporation of more active or sustainable travel into frequent journey routines.

The in-depth interviews provided a sense of how participants have found alternative modes of transport in their local area which were unknown to them prior to the pandemic. This was most clearly shown in an in-depth interview with a participant who grew frustrated with waiting in traffic while commuting to work solely by car. Seeking an alternative to travelling by car, the participant was shown a nearby train station to their house with free parking by a friend for the first time. The participant subsequently began to take a short drive to the train station, and then got on the train to travel to work. Since then, they have continued to combine their use of car and train when commuting.



## Case study new hybridisation of travel

- Participant lives in a suburban area and works full time, commuting into the office 3 days a week.
- Previously commuted by car which took an hour each way and paid for parking in Leeds City Centre.
- Since returning to work, was told by a colleague about a nearby train station which she began to use. This switch was made upon the easing of national lockdown restrictions when their employer requested they return to work for 2 3 set days per week.
- Participant grew frustrated with sitting in traffic when driving to work, the excessive roadworks and cost of parking. Colleague showed them a train station nearby to their house which they had not previously been aware of. The train station also has free parking.
- Upon discovering the nearby train station, the participant took a 5 minute drive from their house to the station, parked for free, and then jumped on a train that arrived at their station every 15 minutes and takes approximately 8 minutes to get to town.
- Participant believed that this switch was permanent given the cost savings (train fare half the price of parking) and amount of time they save commuting to work by train while avoiding heavy traffic on the roads.

## Lack of permanence with active travel

Despite the uptake of active and sustainable travel, participants acknowledged that changes to the Covid-19 pandemic situation could make this a less permanent state of affairs. These participants described how the gradual withdrawal of Covid-19 lockdown restrictions returned a sense of normality to their lives which, in turn, meant that they felt more comfortable reverting to their previous modes of transport and no longer had as much time to walk or cycle. There was an additional sense that the continued build-up of traffic on the roads in recent months would discourage the longer-term uptake of cycling due to safety concerns.

Participants also reflected on the potential for employer demands for working from home and commuting to change in response to the Covid-19 pandemic. They felt that the requirement to commute to the workplace for more days upon the easing of national restrictions had resulted in them having less readily available time for walking and cycling, compared to when they were required to fully work from home.

***“I was walking or cycling either an hour a day, and kept to the guidelines, but I’m back to working full time, I’m not doing any of that a week.”***

*Commuter, previously used public transport/active travel but no longer does, Interview 12*

The depth interviews further highlighted additional instances of switchers to sustainable travel reverting to their previous mode of transport. Participants in such cases discussed how the winter months had influenced their decision to return to their pre-pandemic mode of transport. For instance, cycling and walking was deemed to be less pleasant when in cold, wet, and dark

conditions associated with the winter months, hence making them feel more inclined to resort to public transport. Furthermore, increased vaccination rates constituted another reason behind the decision to use buses and trains more frequently. As national restrictions were eased, concerns over the risk of contracting Covid-19 on public transport were less evident. As a result of the winter months and vaccine uptake, therefore, participants would switch back to using the train rather than walking and / or cycling for their journeys.

***“More temporary as I haven’t been cycling much at all since I’ve been ok getting the train.”***

*Mode switcher, not returned to commuting, Interview 10*



# The future

## Summary

- The future commuting and individual level travel behaviours remains in flux while uncertainty and changes to routines continue.
- The context of Omicron concern meant that participants were wary of further guidance changes on commuting and yet further changes to their current routines.
- Commuting now tended to fit around personal lives, families, and hobbies, rather than vice versa.
- Participants had time to consider the amount of time and money saved when not commuting, and the possibilities with that saved time and money.
- Participants were considering getting rid of cars in favour of public transport, active travel, or electric vehicles given upcoming regulations and environmental implications.
- The conventional five day commute, as it once was, is no more. Yet what hybridisation will look like is yet to be settled given the interplay of shifting employer demands and employee desires.

## New normal hasn't settled

There remains uncertainty at an individual level about what the future of travel looks like, particularly for those in work who were commuting in some way prior to March 2020. Given the constantly changing environment, participants had not settled into their own “new normal” or, indeed, any truly consistent routine over the past 18 months. This, in turn, generated unpredictability in both travel and working patterns. Context is an important driver of behaviour. The *All change?* series of surveys have shown that restrictions being imposed and eased has strongly impacted on the modes of travel people use and the reasons for using them.

The most recent survey suggests some uncertainty – for example, 31% of people were unable to answer either way whether in 12 months' time 'I will go back to doing all of the things I did before, including holidays and travel'. Just under one in ten of those in employment (8%) said they didn't know whether they would be commuting during January-March 2022 while double this proportion (17% of adults) were not sure when they will next travel abroad.

At the time of qualitative fieldwork (November-December 2021), and particularly evident for those who were interviewed later in this timeframe, participants expressed concern and apprehension about the Omicron variant, increasing case numbers, and potential for a re-introduction of restrictions. Those in work were beginning to encounter further changes in guidance from either the government or their employer regarding whether or not to travel into work, and how frequently.

***“I don't know if I'm honest. It's difficult. Part of me did think it's settled but now you listen to the news on the new variant. At the moment, I'm more sticking to my own vehicle.”***

*South West, Suburban, Full-time employment, Commuting to Work 5 days a week or more,  
Interview 13*

There was concern about the potential to catch Covid-19 while commuting via public transport, with participants explaining that they had decided to opt for a car commute, instead of their previous public transport commute, in order to feel safer.

***“The only difference I can see is the worry about being in a closed space with other people, especially with this new variant. It's still the unknown.”***

*South West, Suburban, Full-time employment, Commuting to Work 5 days a week or more,  
Interview 11*

This unease was expressed more so by bus users than other modes. These participants referred to the enclosed spaces, proximity to other passengers who may be coughing, and perceived busyness of bus services at commuting times – as discussed above.

This wasn't the case for everyone. There was concern about the reliability of services as opposed to the risks of catching Covid-19, particularly moving into the winter months when cancellations could be driven by the weather, as well as reduced services for absence through illness.

***“My only option is the train. Trains get cancelled because of a little snow on the tracks, that's my only issue, not particularly concerned about the Covid-19 aspect. It's because of reliability.”***

*Rail commuters, already back to work, short distance commute & regular use, Focus Group 2*

Participants spoke of pandemic fatigue, of having to change their commuting routines constantly. They hoped to be able to settle into some sort of routine, whether that be home working, office working or a hybridisation of the two as soon as possible - in some cases regardless of the ongoing situation.

Having already changed travel patterns for work throughout the pandemic at various intervals since March 2020, (usually around government guidance on working from home or during lockdowns), participants expressed feelings of déjà vu and found it difficult to predict what their commute would look like in the coming months.

***“I'm not concerned about the pandemic anymore. I think we should get over it and move on.”***

*Yorkshire, Suburban, Full-time employment, Commuting to Work less than once a week,  
Interview 3*

## **Lives have changed**

Throughout the past 18 months, participants described how their lives had changed, with working patterns and their commute fitting into and adapting to these changes. There was an

expectation that this would likely continue to change and be dependent upon things such as face-to-face work meetings or travelling to meet clients becoming more frequent again at some point.

***“I think there will be more face-to-face events and meetings so I’ll need to travel more using the train and Tube...the pandemic might continue to influence how I travel next year.”***

*Increase in active travel for commute, Focus Group 9*

Participants expected that, at some point, those who did so before would return to some form of in-person working. Yet lives have changed and the structure of the working day for people looks very different compared to pre-pandemic. Home working had allowed those in work to consider relocating, with less dependence on convenient or practical commuting options.

***“Around work it’ll be much the same. We’re hoping to move more to the countryside...I’d be looking for somewhere with decent train or bus routes into the centre of Norwich.”***

*Not back to work, not reliant on public transport, suburban/rural, Focus Group 8*

Those who had moved house or changed jobs during the pandemic, reflected upon their priorities such as easy access to city centres or friends for socialising, and there was a preference for a short commute when going into the office, and proximity to friends and family.

***“I’m planning a big change. I’m planning to move to London for my job and want to start getting the Tube or cycling.”***

*Rail commuters, already back to work, long distance commute & regular use, Focus Group 1*

Aside from work, participants also felt that their priorities had changed, and their new routines reflected that. Flexibility to do other things and fit the commute or their working hours (if possible) around their personal lives was the “new normal”. Time with the family or for personal hobbies was seen to be an important thing to build into the day where possible instead of reverting to old, pre-pandemic habits.

***“The nature of work has changed so much...spending time with family or going to gym is more valuable than commute.”***

*Rail commuters, already back to work, long distance commute & regular use, Focus Group 1*

Given the length of time elapsed since the pandemic began, some parents discussed new situations – for example, a child being old enough to travel to and from school alone, meaning that they would have that additional time back in their day. For one participant, not needing to use the car to drop off his daughter meant that he considered cycling to work instead, something that would’ve have been impossible previously.

***“I’m going to look to cycle to work more as my daughter will be making her own way to school.”***

*Increase in active travel for commute, Focus Group 9*

Having experienced and gotten into the habit of these new routines, it was deemed easier to work from home, and use that time particularly where children were involved.

### The time and financial costs of commuting

Another factor discussed as potentially dissuading people from returning to public transport in general, but particularly for commuting, was the time saving. For large parts of the population, the lockdowns throughout 2020 and 2021 meant that they were advised to work from home wherever possible, with many people moving to permanent home working for the majority of that period. For those previously commuting to and from work 5 days a week, that meant saving the time of that daily commute over several months.

Longer distance commuters described saving time that they previously would have spent travelling. Having experienced being able to utilise this time differently, whether that be for an earlier start, time with family, or for leisure, they were reluctant to relinquish it and return to lengthy commutes.

***“Working from home is great. It cuts down my 25 hour [a week] commute to just 10.”***

*Rail commuters, already back to work, long distance commute & less regular use, Focus Group*

3

Even if that time wasn't earmarked for a particular purpose, simply having a later start in the morning or the extra rest was preferred to travelling.

Similarly, there were participants who had experienced substantial cost savings, given they were not having to pay for travel to and from work at all during parts of the pandemic. They explained how they had calculated how much they had saved over certain period where they had been home working 100% of the time and what that money could be better spent on.

***“I don't have to be in a lot, so I obviously prefer to stay at home, but cost is still quite a big factor in that it's cheaper to stay at home.”***

*Reliant on public transport, back to work, Focus Group 5*

In addition to this, participants thought that there would likely be a price increase on trains in the New Year (i.e. January 2022), so anticipated the commute becoming even more expensive than it had been previously- a further deterrent to their return.

### Future intentions about car reduction and purchase

As well as thinking about future intentions for public transport and sustainable travel overall, there were discussions around future purchase intentions of personal vehicles given the experiences of the pandemic.

For those who had either moved away from using their car very much for commuting or switched to public transport or more sustainable modes, participants discussed no longer needing a car. This was the case especially in big cities such as central London where participants felt that it was easier and more cost effective to travel using other modes.

***“I might have my car and not use it much, or will get rid of it completely. Want to start getting the Tube or cycle because its more convenient in London”.***

*Rail commuters, already back to work, long distance commute & regular use, Focus Group 1*

It was also the case that for some families with multiple cars, they would no longer need more than one vehicle, given one or both of the parents adopting hybrid working patterns, changes to the school run if children were older, or switching to more sustainable travel modes for commuting.

Another sustainable intention discussed by participants was around electric vehicle purchasing, with a number of participants expressing an interest or saying that they were considering buying an electric vehicle in the immediate or near future.

When discussing sustainable travel in particular, participants felt that replacing their current car or adding an additional electric (rather than petrol/diesel) car to the household would be beneficial to the environment.

***“We may go up to a 2 electric car household. It would be easier to not coordinate with partner. Electric car because is better for the environment. One reason we dropped the second car was not really financial, it was more of ecological factors”.***

*Rail commuters, already back to work, long distance commute & regular use, Focus Group 1*

This wasn't the case for everyone, as across multiple groups, the upcoming Clean Air Zones to be introduced in a number of major towns and cities across the UK were also flagged as contributing factors.

***“I'll be travelling to work by car and looking to buy an electric car because of environmental reasons and the talk of bans in city centre of diesel and petrol cars”.***

*Not back to work, not reliant on public transport, urban, Focus Group 7*

Electric vehicles also appealed to those who were aware of friends or family who had made recent purchases which had been a success, emphasising the importance of seeing real-life examples in persuading people to adopt newer, less familiar ways of travelling.

***“I hope I will go for the electric on my car. My next car I'm hoping to go electric, fully electric yeah. My mum and dad have had one for about several months now and they say it's fine”.***

*Reliant on public transport, back to work, Focus Group 5*

### **The five-day commute is no more**

It's clear that the pre-pandemic norm of commuting five days a week (or something close to that) is unlikely to return. Participants described how much they appreciated – and made use of – their new-found extra time. Nor did they expect employers to demand a full return to the previous status quo. The extent of commuting and hybrid working will be a careful balance between employer culture, employer demands, and employee desires.

Participants described how they, as employees, want to maintain some level of choice over how and when they work. And they expect employers to compromise on this with them – in essence, to allow what has worked so far to continue in some form. That said, there were those who were concerned about employers demanding a return to full time in-office work, largely driven by concerns about the extent to which home working is productive.

***“I’m hoping nothing changes and we are still allowed to have hybrid work from home and office system. I don’t want to be pressurized into going into the office 5 times a week.”***

*Rail commuters, already back to work, long distance commute & regular use, Focus Group 1*

Indeed, there were suggestions that employers need to be careful with employee desires and not to push too hard for greater in-office attendance. Participants described how they had gotten used to greater freedom and flexibility in their working patterns and would consider their options if employers did not continue to enable this.

***“Working from home is good, allows for hobbies, kids. People having been quitting if the push to return to the office is too strong.”***

*Rail commuters, already back to work, long distance commute & less regular use, Focus Group*

3

Overall, participants described being happy with a compromise hybrid approach. There was a distinct desire to return to some face-to-face contact with colleagues, collaborative working, development opportunities, and seeing colleagues to socialise. But this should be at their discretion rather than dictated to them.

***“Younger members of staff are missing out on intangible benefits from not being in the office such as training.”***

*Rail commuters, already back to work, long distance commute & less regular use, Focus Group*

3

How this plays out in terms of travel and, in particular, commuting remains to be seen. It’s clear that travel habits remain some way from settling into a fabled “new normal”, with seasonal variations and the potential disruption of new variants. Travel patterns remain in a state of flux at the individual level as people balance new modes of travel, new routes, and new ways of working against their personal circumstances and a pandemic that is not yet over.



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# For more information

3 Thomas More Square  
London  
E1W 1YW

t: +44 (0)20 3059 5000

[www.ipsosmori.com](http://www.ipsosmori.com)  
<http://twitter.com/IpsosMORI>

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