

**August 2022**

# **COVID-19 business travel survey December 2021**

**Summary report for the Department for  
Transport**



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# 1 Introduction and key findings

## 1.1 Survey objectives and method

The Department for Transport (DfT) commissioned Ipsos UK to conduct an online survey of decision-makers in UK companies that undertook domestic business travel before the COVID-19 pandemic. It focussed on the impact of the pandemic on demand for non-commuting domestic and international business trips, and on their companies' decarbonisation plans.

Survey fieldwork took place between 7-15 December 2021. The sample comprised 555 company managers / executives with influence over business travel decisions for employees within their organisation.

## 1.2 Definitions

In this report and in the survey, **domestic business trips** are defined as 'any journey made within the UK for business purposes, including domestic travel to international airports/ports, but excluding commuting, and excluding overseas travel'. **International business trips** are any trips made between the UK and another country, excluding travel to international airports/ports within the UK. A business trip could include attending an exhibition/trade show or conference, training/research/education, meeting clients or potential customers, visiting another part of the organisation, construction or other site visits, deliveries or general business. Return journeys were to be considered as separate trips.

Where '**employees**' are referenced, this refers to employees for which the respondent would play a role in the selection or purchase of business travel.

Respondents were asked about their organisation's business travel at three time points:

- **Pre-pandemic:** the 12-month period prior to the COVID-19 pandemic (i.e. from March 2019 to February 2020)
- **Autumn 2021:** the period between August and November 2021 when restrictions were relaxed
- **Post-pandemic:** looking ahead to 12 months after survey fieldwork (i.e. December 2022), and assuming no further restrictions would be put in place

Data are weighted to be representative of the overall population of UK businesses in terms of business size and sector.

## 1.3 Notes on the findings

The findings give a broad indication of business travel volumes and patterns as estimated/reported by company managers/executives. Survey respondents gave best estimates of their organisations' travel at the three different time points. Reliability of findings may be affected by the length of time that had elapsed since the pre-pandemic period and uncertainty around the future pandemic context. Where a large proportion of respondents (>5%) responded 'don't know' to a question, it has been highlighted in this document.

Statistical tests have been applied to the data to provide an indication of which changes are statistically significant, based on a 95% confidence interval. Strictly speaking, significance tests should only be applied to two or more discreet probability samples. However, they have been applied to the data in this

report to help readers interpret the results. All differences mentioned in this document are statistically significant unless otherwise stated.

## 1.4 Key findings

### Domestic business travel

Impact of the pandemic on the proportion of businesses conducting domestic business travel (amongst all businesses that conducted domestic business travel pre-pandemic, n=555 companies)

- **There had been a reduction in the proportion of companies conducting domestic business travel in autumn 2021, when compared with the period before the pandemic.** Three quarters of businesses (75%) that made domestic trips in the year before March 2020, said employees in their organisation continued to do so in autumn 2021.
- **Looking ahead to December 2022, these findings suggest that the proportion of businesses conducting domestic travel will return to pre-pandemic levels.** 99% of businesses that travelled domestically pre-pandemic expected employees in their organisations to do so post-pandemic.

Impact of the pandemic on the volume and frequency of domestic business travel, and on the modes used (amongst companies that continued travelling domestically in autumn 2021, n=433 companies)

- **In companies that continued domestic travel in autumn 2021, there had been a reduction in the proportion of staff travelling domestically for business when compared with the pre-pandemic period.** In organisations able to estimate their level of travel,<sup>1</sup> an average (mean) of 31% of employees travelled domestically for business in autumn 2021; before the pandemic, 37% of employees in these companies did so. **Post-pandemic these companies expected the proportion of employees travelling to return to pre-pandemic levels.** Organisations able to anticipate their level of travel post-pandemic<sup>2</sup> expected 35% of their employees to travel domestically for business.
- **There had been a decrease in the frequency of domestic travel amongst businesses that continued travelling in autumn 2021, when compared to the pre-pandemic period.** 33% of these companies said employees travelling for business did so on average at least weekly in autumn 2021, 61% at least monthly and 39% less than once a month. Before the pandemic, these figures were 33%, 74% and 26% respectively. **After the pandemic, these companies expected their frequency of domestic travel to return to pre-pandemic levels.** Amongst organisations able to anticipate their level of travel post-pandemic,<sup>3</sup> 35% expected staff who travel for business to do so on average at least weekly, 73% at least monthly and 27% less than once a month.
- **Looking at the mix of modes for domestic business trips, companies that continued to travel in autumn 2021 increased their use of car travel (private vehicle / hire car / company car) when compared with the pre-pandemic period.** In autumn 2021, an average (mean) of 37% of these companies' domestic trips used car as the main mode of transport, an increase from 31% pre-pandemic. Their use of other modes remained the same. For example, 10% of trips used long

<sup>1</sup> 20% of companies did not know what proportion of staff in their companies travelled domestically for business in autumn 2021 and 14% did not know what proportion did so pre-pandemic

<sup>2</sup> 23% of companies did not know what proportion of staff will be travelling domestically post-pandemic

<sup>3</sup> 23% of companies did not know how frequently staff in their companies will be travelling domestically post-pandemic

distance train (vs. 12% pre-pandemic) and 9% used domestic air (vs. 10% pre-pandemic). **Post-pandemic, companies expected their mix of modes to be in-line with pre-pandemic levels.** Organisations able to anticipate their level of domestic travel post-pandemic<sup>4</sup> expected 36% of trips to use car as the main mode, 13% to use long distance train and 10% to use domestic air.

### International business travel

Impact of the pandemic on the proportion of businesses conducting international business travel (amongst all businesses that conducted international business travel pre-pandemic, n=340 companies)

- **There had been a reduction in the proportion of companies conducting international business travel in autumn 2021, when compared with the pre-pandemic period.** Under six in ten (56%) businesses that conducted international business travel pre-pandemic said employees in their organisation continued to do so in autumn 2021.
- **Looking ahead to December 2022, these findings suggest that the proportion of businesses conducting international travel will return to pre-pandemic levels.** 100% of businesses that conducted international travel pre-pandemic expected employees in their organisations to travel internationally post-pandemic.

Impact of the pandemic on the volume and frequency of international business travel (amongst companies that continued travelling internationally in autumn 2021, n=210 companies)

- **In companies that continued international travel in autumn 2021, there had been a reduction in the proportion of staff travelling internationally for business when compared with the pre-pandemic period (however, this difference was not statistically significant).** In organisations able to estimate their level of travel,<sup>5</sup> an average (mean) of 22% of their employees travelled internationally for business in autumn 2021; before the pandemic, 27% of employees in these companies did so. **Post-pandemic these companies expected the proportion of employees travelling to be in-line with pre-pandemic levels.** Organisations able to anticipate their level of travel post-pandemic<sup>6</sup> expected 27% of their employees to travel internationally for business.
- **There had been no change in the frequency of international business travel amongst businesses that continued travelling in autumn 2021, when compared to the pre-pandemic period.** 27% of companies said employees travelling for business did so on average at least weekly in autumn 2021, 48% at least monthly and 51% less than once a month. Before the pandemic, these figures were 25%, 54% and 46%. respectively. **Post-pandemic, these companies expected their frequency of international business travel remain at pre-pandemic levels.** Amongst organisations able to anticipate their level of travel post-pandemic,<sup>7</sup> 21% expected staff who travel internationally for business to do so on average at least weekly, 54% at least monthly and 46% less than once a month.

<sup>4</sup> 25% of companies did not know what modes will be used for domestic travel post-pandemic

<sup>5</sup> 25% of companies did not know what proportion of staff in their companies travelled internationally for business in autumn 2021 and 21% did not know what proportion did so pre-pandemic

<sup>6</sup> 25% of companies did not know what proportion of staff will be travelling internationally post-pandemic

<sup>7</sup> 25% of companies did not know what how frequently staff in their companies will be travelling internationally post-pandemic

## Decarbonisation

Decarbonisation plans and actions to reduce the number of business trips and their carbon emissions (amongst all businesses that conducted business travel pre-pandemic, n=555 companies)

- **Almost three quarters (72%) of companies had plans to reduce the levels of carbon dioxide** generated by their business in the future.
  - A third (32%) had sped up their decarbonisation plans in response to the pandemic while 16% had slowed down their plans (39% said there had been no change in pace).
- Respondents were asked if their business had implemented any specific actions to help reduce the number of business trips and their carbon emissions. **The most common actions were allowing increased home working (45% of organisations were offering this), substituting travel with video conferencing (40%), and allowing flexible work times (30%).**
  - Over the next 3 to 5 years a further 22% of companies said they plan to start substituting travel with video conferencing, and allowing flexible work times, and 20% said they plan to start allowing increased home working.

## 1.5 Methodology

Ipsos UK conducted an online survey of 555 decision makers for domestic business trips in the UK. Fieldwork was conducted between 7<sup>th</sup> and 15<sup>th</sup> December 2021.

To be eligible to participate in the survey, participants had to meet several conditions, including: being of at least management level seniority; having influence over business travel decisions for their employees; and that employees must have travelled for business in the 12 months before the coronavirus pandemic. Fieldwork was monitored to ensure a spread of industries and business sizes, to ensure at least 100 responses were received from representatives of businesses in each size category: small (0-49 employees), medium (50-249 employees) and large (250+) businesses.

Data are weighted according to the number of employees within each respondent's business and industry sector. The business size weights were based on data obtained from BEIS business population estimates for the UK (published on 7<sup>th</sup> October 2021). Weights for industry sector were based on ONS UK labour market statistics from November 2021 as estimated by the Labour Force Survey. Three business size categories were used for weighting (Small, Medium and Large) while five sector groupings were used (Primary / Secondary industries<sup>8</sup>; Retail / Wholesale; Business Support, Professional Services, Information and Finance; Healthcare, Education and Transport, and Other). Only weighted data are reported within this report.

## 1.6 Interpretation of data

Data are analysed using sub-groups throughout the report. Survey findings are reported by size, sector and region where there was at least one significant difference between two or more groups with a base size of 50 or more respondents. In some cases, particularly when asking questions exclusively to those whose employees had travelled for business during the pandemic, some bases are low. Where bases under 50 are shown in the data, results should be treated with caution.

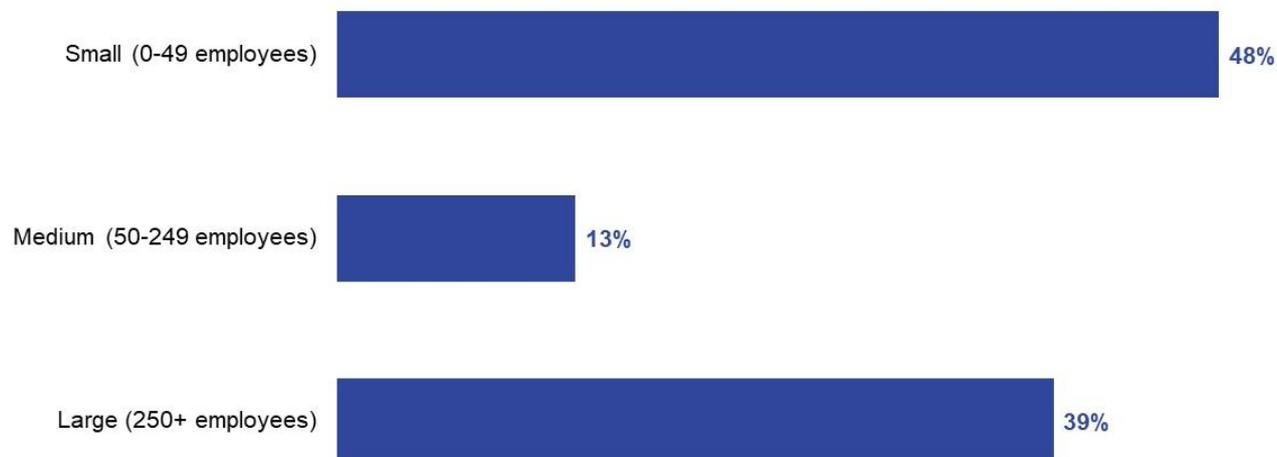
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<sup>8</sup> This included construction, manufacturing and agribusinesses

## 1.7 Sample profile questions

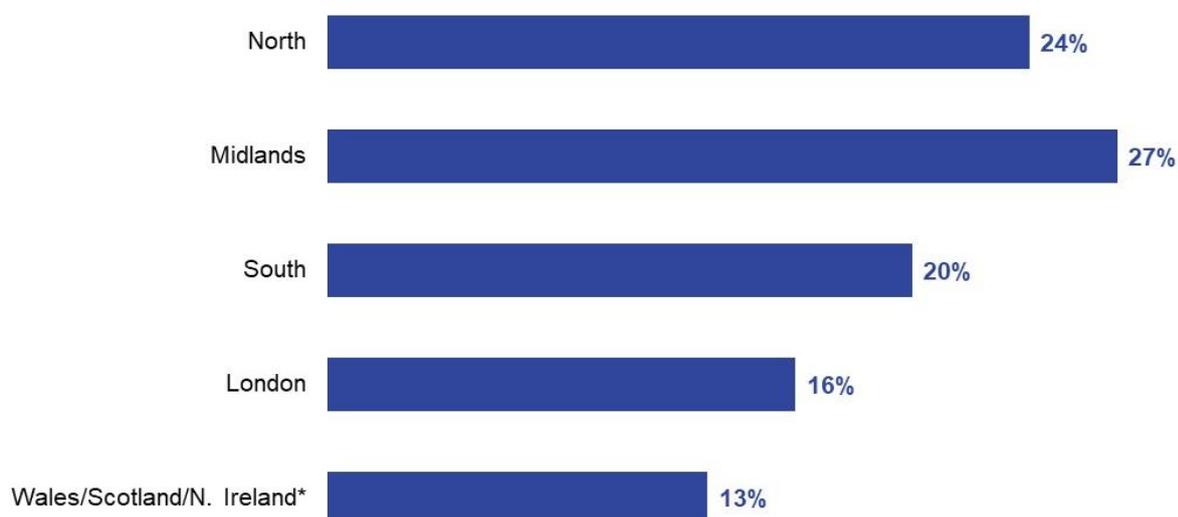
The weighted profile of the sample was as follows:

Q1.3. How many employees are currently working in your entire organisation in the UK, including yourself? Please give your best estimate.



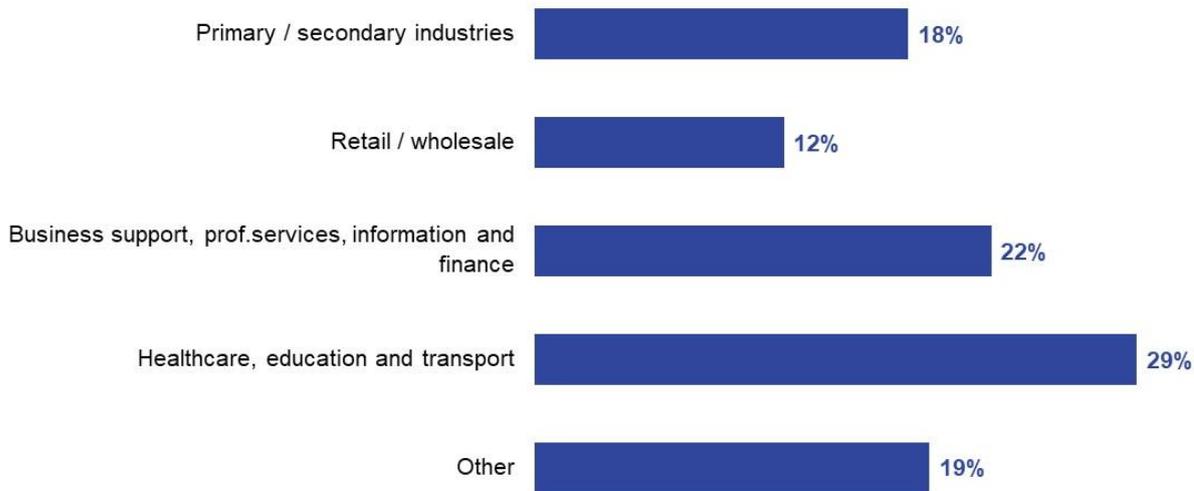
*Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic (555).*

Q1.4.1. Please include the region where your organisation's UK head office is located.



*Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic (555).*

Q1.1. Which of the following, if any, best represents your organisation? Please select the option that best aligns with the largest proportion of your activity.



*Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic (555).*

## 2 Domestic business travel – before, during and after the COVID-19 pandemic

### 2.1 Impact of the pandemic on the proportion of businesses conducting business travel

There had been a reduction in the proportion of businesses conducting domestic business travel in autumn 2021, when compared with the period before the pandemic. Three quarters (75%) of businesses that made domestic trips in the year before March 2020, said employees in their organisation continued to do so in autumn 2021.

Higher proportions of large businesses (85%) and medium businesses (80%) continued to travel domestically in autumn 2021 than small businesses (66%). Businesses in London (85%) were more likely than average (75%) to continue to travel domestically.

Looking ahead to December 2022 these findings suggest that the proportion of businesses conducting domestic travel will return to pre-pandemic levels. 99% of businesses that travelled domestically pre-pandemic expect employees in their organisations to do so post-pandemic.

Q3.4. Did any of your organisation's employees make domestic or international business trips in the period since domestic restrictions were relaxed across the UK, from August to November 2021 – NET domestic.



*Base: Q3.4: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic (555); Small business (155), Medium business (173), Large business (227)*

## 2.2 Impact of the pandemic on the proportion of employees making domestic business trips

In companies that continued domestic travel in autumn 2021, there had been a reduction in the proportion of staff travelling domestically for business when compared with the pre-pandemic period. In organisations able to estimate their level of travel,<sup>9</sup> an average (mean) of 31% of employees travelled domestically for business in autumn 2021; before the pandemic, 37% of employees in these companies did so.

Statistically significant reductions in business travel were observed amongst large businesses (34% of employees pre-pandemic, vs. 25% in autumn 2021).

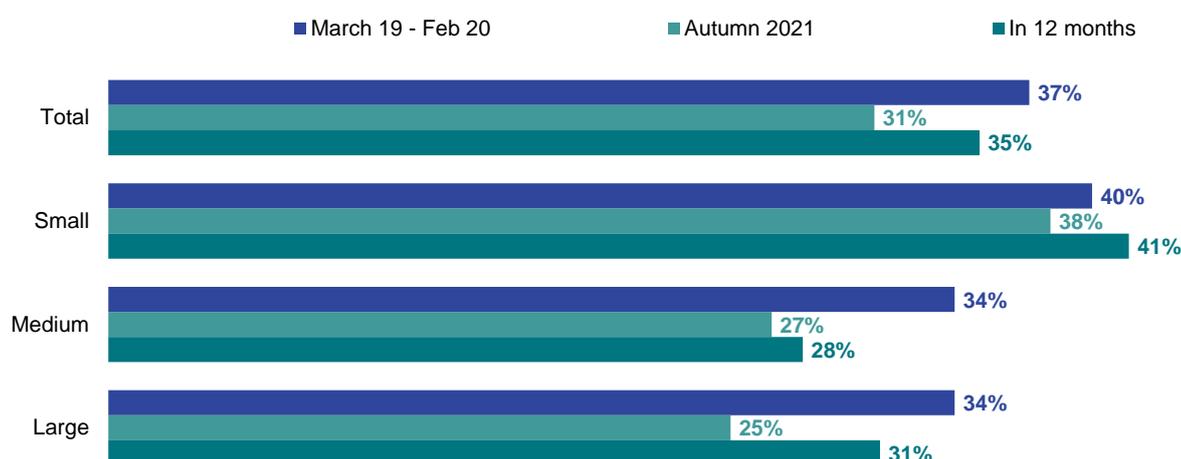
Post-pandemic, companies that continued travelling in autumn 2021 expected the proportion of employees travelling to return to pre-pandemic levels. Organisations able to anticipate their level of travel post-pandemic<sup>10</sup> expected 35% of their employees to travel domestically for business (vs. 37% pre-pandemic).

No business sizes or sectors expected to have significantly different proportions of staff travelling post pandemic, when compared to the pre-pandemic period.

Q2.2. Thinking of the period between March 2019 and February 2020. Approximately what percentage of all employees made **domestic** business trips during this period?

Q3.5.1a. Thinking of the period since domestic restrictions were relaxed across the UK, from August to November 2021. Approximately what percentage of all employees made **domestic** business trips during this period?

Q5.3.1a Please think ahead to 12 months from now, assuming there are no Covid-19 restrictions in place. Approximately what percentage of all employees do you expect to make **domestic** business trips?



*Base: Q2.2 / Q3.5.1a / Q5.3.1a: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND in Autumn 2021 (433); Small business (103), Medium business (138), Large business (192).*

<sup>9</sup> 20% of companies did not know what proportion of staff in their companies travelled domestically for business in autumn 2021 and 14% did not know what proportion did so pre-pandemic

<sup>10</sup> 23% of companies did not know what proportion of staff will be travelling domestically post-pandemic

Base: Q5.3.1a All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND in Autumn 2021 AND can anticipate their level of travel post pandemic (313); Small business (83), Medium business (85), Large business (145).

### 2.3 Impact of the pandemic on the frequency of employees making domestic business trips

There had been a decrease in the frequency of domestic travel amongst businesses that continued travelling in autumn 2021, when compared to the pre-pandemic period. 33% of these companies said employees travelling for business did so on average at least weekly in autumn 2021, 61% at least monthly and 39% less than once a month. Before the pandemic, these figures were 33%, 74% and 26% respectively.

Lower frequency travel (i.e. less frequently than once per month) increased amongst small businesses (from 31% pre-pandemic to 42% in autumn 2021), medium businesses (16% to 27%), large businesses (24% to 40%), businesses in the south (22% to 38%), London (23% to 43%), Primary & Secondary (13% to 28%) and business support and professional services companies (24% to 47%).

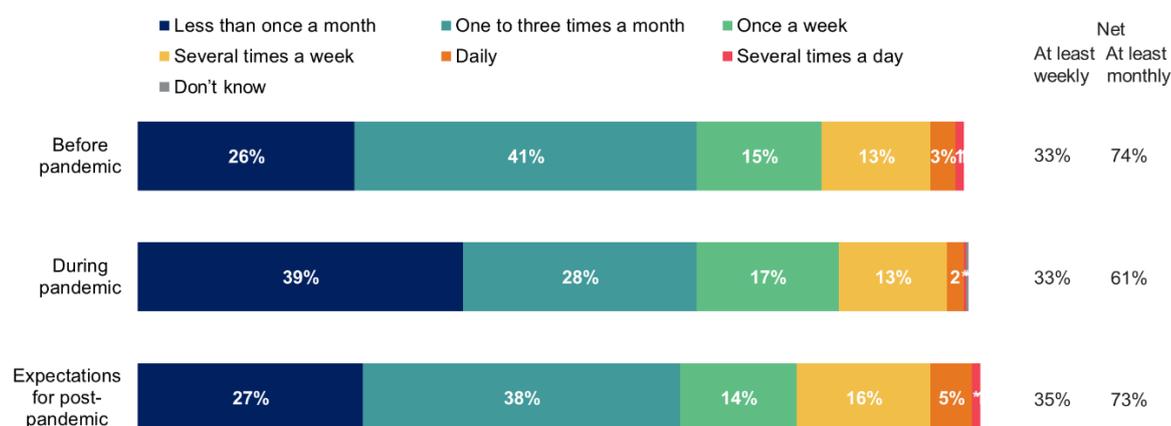
After the pandemic, companies that continued travelling in autumn 2021 expected their frequency of domestic travel to return to pre-pandemic levels. Amongst organisations able to anticipate their level of travel post-pandemic,<sup>11</sup> 35% expected staff who travel for business to do so on average at least weekly, 73% at least monthly and 27% less than once a month.

Post pandemic, no business sizes or sectors expected to have significantly different proportions of staff travelling weekly or more, or monthly or more compared to pre-pandemic.

Q2.2.1b Thinking of all employees that made **domestic** business trips in the period between March 2019 and February 2020, how often, if at all, did they do this?

Q3.5.1b Thinking of all employees that made **domestic** business trips from August to November 2021, how often, if at all, did they do this?

Q5.3.1b Thinking of all employees that you expect to make **domestic** business trips 12 months from now, assuming there are no Covid-19 restrictions in place, how often, if at all, will they do this?



<sup>11</sup> 23% of companies did not know how frequently staff in their companies will be travelling domestically post-pandemic

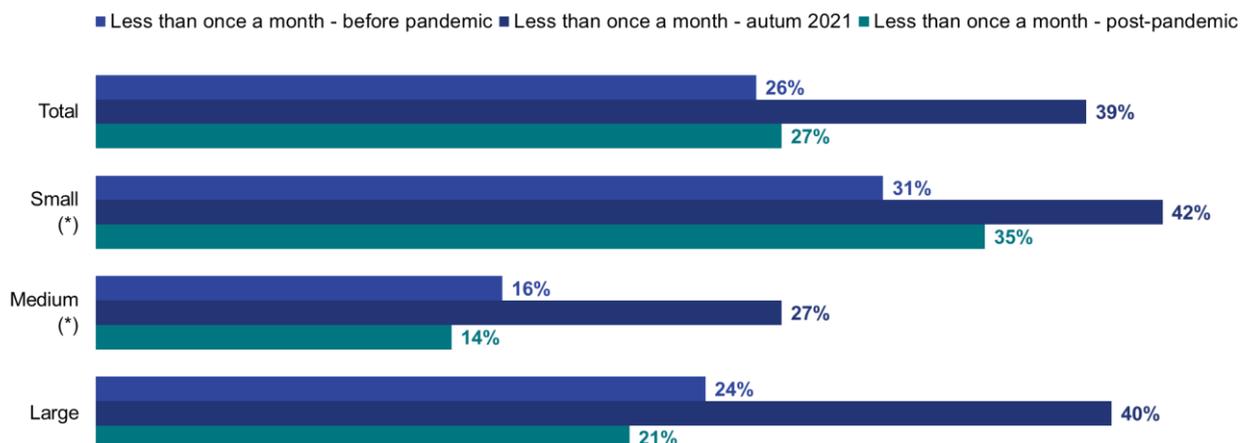
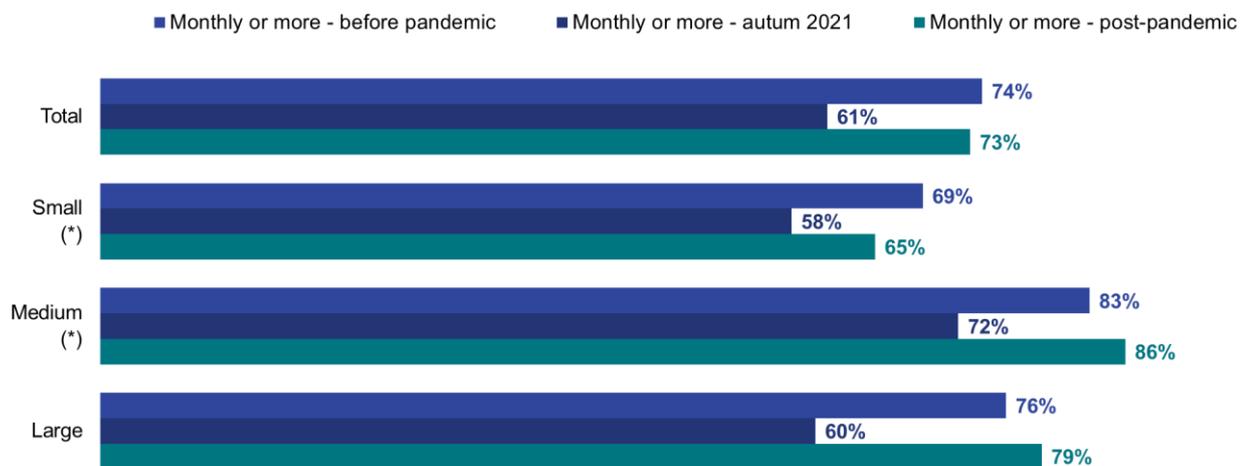
Base: Q2.2.1b / Q3.5.1b All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND in Autumn 2021 (433).

Base: Q5.3.1b All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND in Autumn 2021 AND can anticipate their level of travel post pandemic (313).

Q2.2.1b Thinking of all employees that made **domestic** business trips in the period between March 2019 and February 2020, how often, if at all, did they do this?

Q3.5.1b Thinking of all employees that made **domestic** business trips from August to November 2021, how often, if at all, did they do this?

Q5.3.1b Thinking of all employees that you expect to make **domestic** business trips 12 months from now, assuming there are no Covid-19 restrictions in place, how often, if at all, will they do this?



Base: Q2.2.1b / Q3.5.1b All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND in autumn 2021 (433); Small business (103), Medium business (138), Large business (192).

*Base: Q5.3.1b All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND in Autumn 2021 AND can anticipate their level of travel post pandemic (313); Small business (83), Medium business (85), Large business (145).*

## 2.4 Impact of the pandemic on the mode of transport for domestic business trips

Those who took part in the survey were asked about the modes of transport employees used as their main mode of travel when taking domestic business trips. The main mode of travel was defined as the mode used for the greatest distance on any one journey.

Companies that continued to travel in autumn 2021 increased their use of car travel (private vehicle / hire car / company car) when compared with the pre-pandemic period. In autumn 2021, an average (mean) of 37% of these companies' domestic trips used car as the main mode of transport, an increase from 31% pre-pandemic. Their use of other modes remained the same. For example, 10% of trips used long distance train (vs. 12% pre-pandemic) and 9% used domestic air (vs. 10% pre-pandemic).

Post-pandemic, companies expected their mix of modes to be in line with pre-pandemic levels. Organisations able to anticipate their level of domestic travel post-pandemic<sup>12</sup> expected 36% of trips to use car as the main mode, 13% to use long distance train and 10% to use domestic air.

When looking at different types of business, there were no significant changes in mode use between time points (pre-pandemic vs. autumn 2021 and autumn 2021 vs. post-pandemic).

Small businesses were significantly more reliant on car travel at all three time-points, when compared with medium and large businesses. Small businesses used car travel for 38% of trips pre-pandemic, 46% of trips in autumn 2021 and they expected to use car for 45% of trips post-pandemic. The respective figures for medium businesses were 23%, 31% and 25%; and for large businesses the figures were 26%, 30% and 29%.

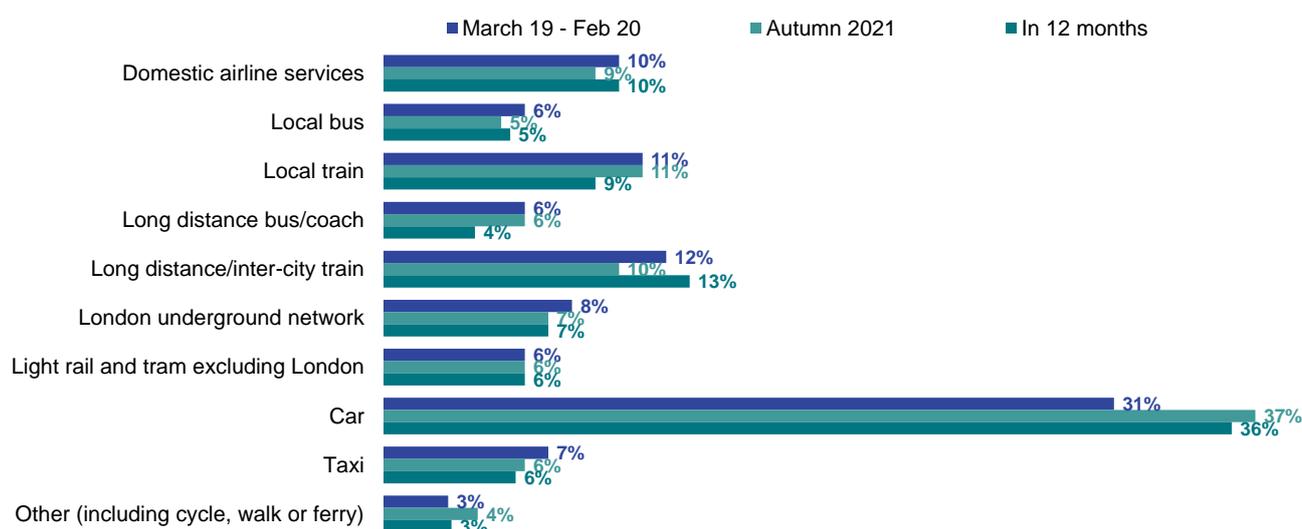
Q2.3. Between March 2019 and February 2020, what proportion of domestic business trips made by all employees in your organisation used the following modes of transport as the main mode of travel?

Q3.6. Since domestic restrictions were relaxed across the UK, from August to November 2021, what proportion of domestic business trips made by all employees in your organisation used the following modes of transport as the main mode of travel?

Q5.4.1 Thinking ahead to 12 months from now, assuming there are no Covid-19 restrictions in place. What proportion of domestic business trips do you expect will use the following modes of transport as the main mode of travel?

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<sup>12</sup> 25% of companies did not know what modes will be used for domestic travel post-pandemic



*Base: Q2.3 / Q3.6 All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND in autumn 2021 (433).*

*Base: Q5.4.1 All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND in autumn 2021 AND can anticipate their level of travel post pandemic (313).*

Q2.3. Between March 2019 and February 2020, what proportion of domestic business trips made by all employees in your organisation used the following modes of transport as the main mode of travel?

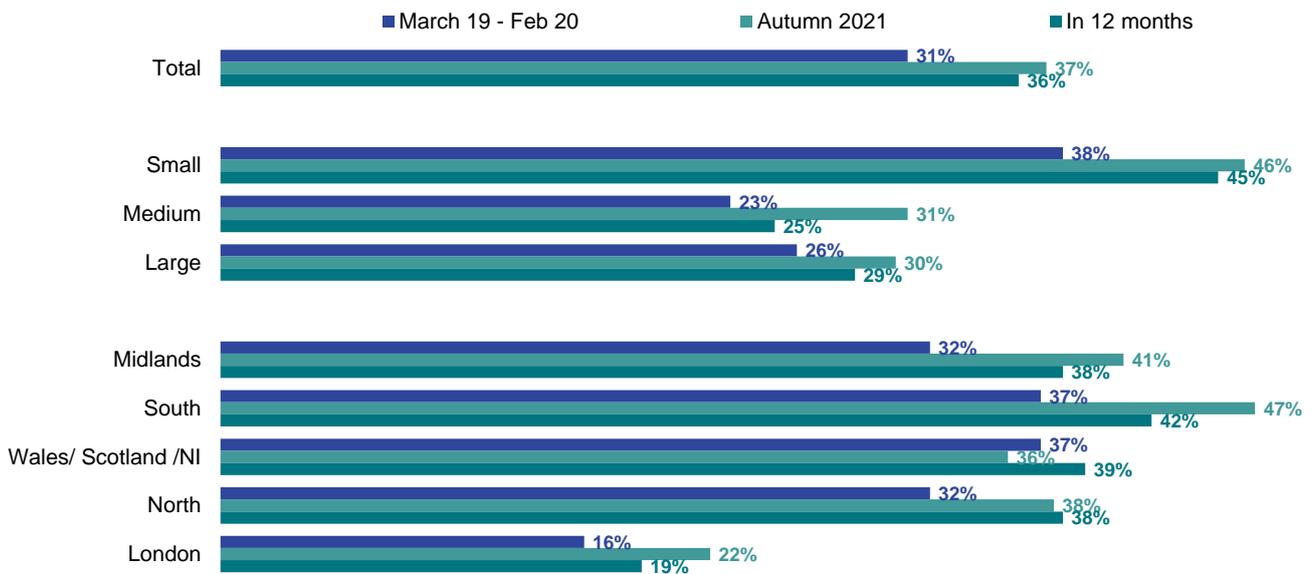
**Car (including private vehicle, hire car & company car)**

Q3.6. Since domestic restrictions were relaxed across the UK, from August to November 2021, what proportion of domestic business trips made by all employees in your organisation used the following modes of transport as the main mode of travel?

**Car (including private vehicle, hire car & company car)**

Q5.4.1 Thinking ahead to 12 months from now, assuming there are no Covid-19 restrictions in place. What proportion of domestic business trips do you expect will use the following modes of transport as the main mode of travel?

**Car (including private vehicle, hire car & company car)**



*Base: Q2.3 / Q3.6 All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND autumn 2021 (433); Small business (103), Medium business (138), Large business (192); Midlands (101), South (87), Wales/Scotland/NI (45), North (108), London (92).*

*Base: Q5.4.1 All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND autumn 2021 AND can anticipate their level of travel post pandemic (313); Small business (83), Medium business (85), Large business (145); Midlands (74), South (64)\*, Wales/Scotland/NI (36)\*, North (74), London (65)\*. An asterisk (\*) indicates a small base size.*

## 2.5 Purpose of business travel before the pandemic

Businesses that continued travelling domestically in autumn 2021 were asked the reasons for their domestic travel pre-pandemic, and whether travel for this purpose had increased or decreased in autumn 2021 and whether they expected it to increase / decrease post-pandemic.

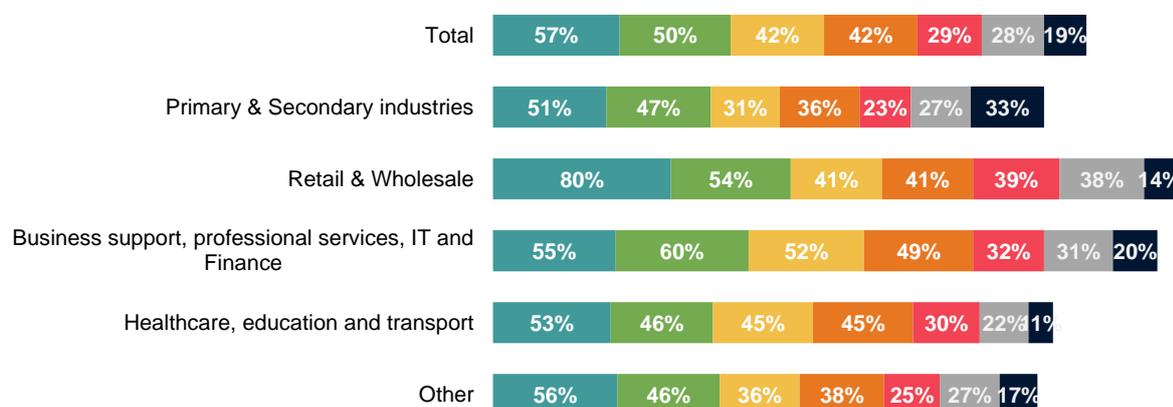
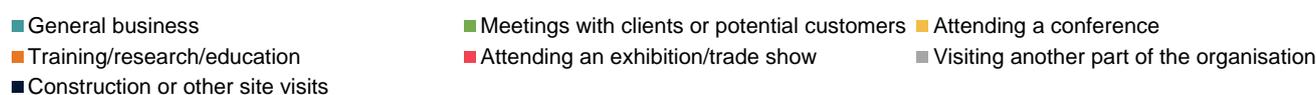
Amongst these businesses, the most common reason for making domestic business trips prior to the pandemic was to engage in “general business” activities. Almost six in ten (57%) reported that their employees made business trips for general, unspecified reasons, while half (50%) were travelling to meet clients or potential customers. The least likely reason for making domestic business trips was to make construction or other site visits (19%).

The purpose of travel varied by size of business pre-pandemic. In line with the extent and complexity of their operations, those in medium (33%) and large (47%) businesses were significantly more likely to be visiting other parts of their operation than their counterparts in small businesses (16%). Employees of small businesses were significantly less likely to be travelling to attend conferences (31% small vs. 50% medium and 52% large).

There was some significant variation in the purpose of travel by sector and naturally these reflected the requirements of running businesses connected to these industries. Construction and site visits were more prevalent within the Primary/Secondary industries sector (33%) than average (19%). Those engaged in Business Support, Professional Services, Information and Finance were more likely than average to have attended conferences (55%) or to have met with clients or potential customers (62%). The respective averages across all businesses were 42% and 50%.

By region, businesses in London (43%) were more likely than those on average (28%) to have made business trips to visit other parts of the organisation. While a third (34%) of business based in London made construction or other site visits, fewer than a fifth of businesses in other UK regions did so pre-pandemic. For example, just 12% of businesses in southern England, and 13% in northern England did this.

Q2.4 Thinking of the period between March 2019 and February 2020. For which, if any, of the following reasons was **domestic** business travel taken by employees in your organisation?



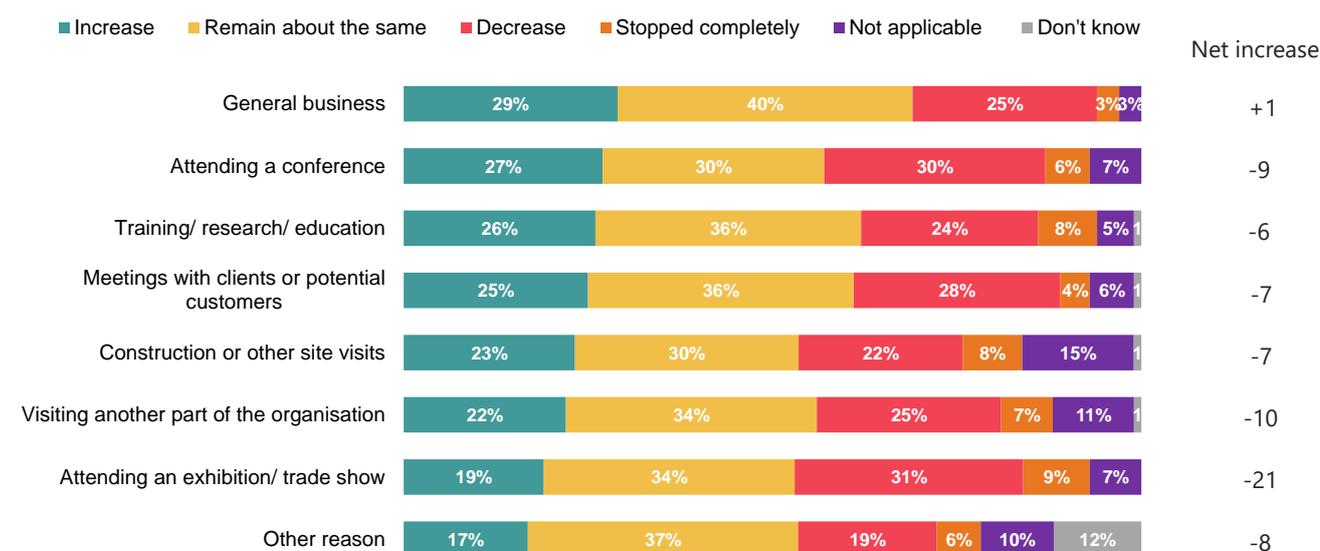
Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND mid-pandemic (433).

## 2.6 Changes to purpose of business travel during the pandemic

In broad terms, the amount of domestic business travel associated with specific activities in autumn 2021 was unchanged compared to the pre-pandemic period. For most activities, the proportion saying the level of activity had decreased was matched by the number reporting that it had increased. For example, around a quarter (26%) said there was an increase in trips for training/research/education; with a similar proportion stating that this had decreased (24%). For just over a third (36%) such trips were at pre-pandemic levels.

The one activity for which the level of domestic business travel was below pre-pandemic levels was attending an exhibition or trade show. Three in ten (31%) reported that this had decreased when compared to pre-pandemic, while 'only' two in ten (19%) said such activity had increased.

Q7.1 Thinking of the period since domestic restrictions were relaxed across the UK, from August to November 2021. What changes did you see in the amount of **domestic** business travel for each of the following business activities, compared to before the pandemic (between March 2019 and February 2020)?



Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND mid-pandemic (433).

There were few significant variations in responses between sectors, regions or businesses of different size. However, the following significant differences were seen:

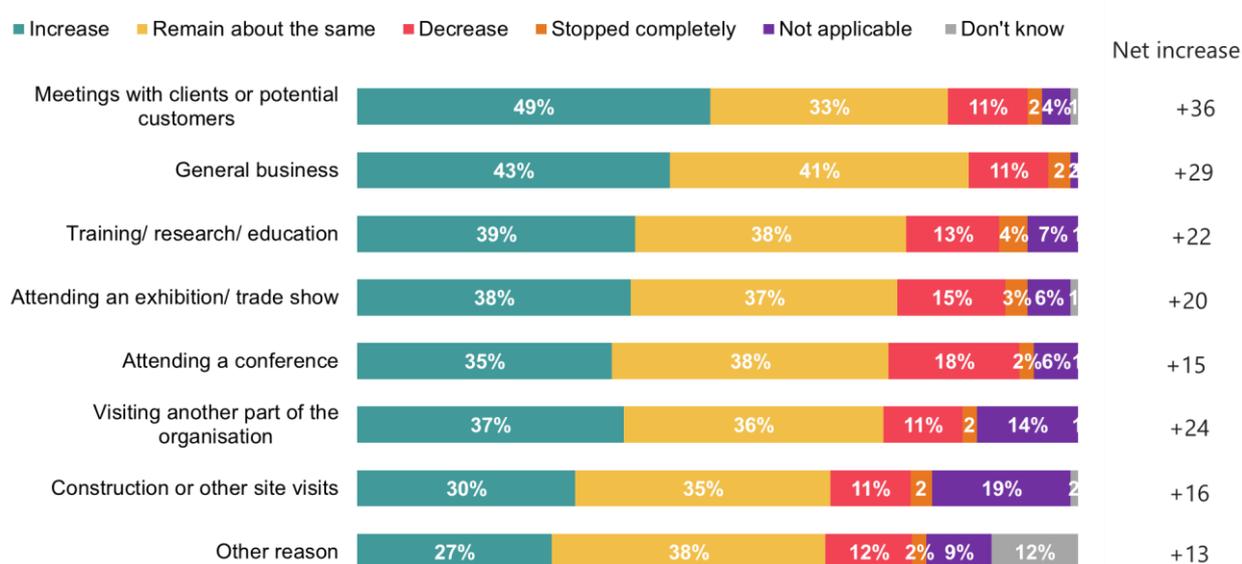
- Around a third (35%) of Healthcare, Education and Transport organisations reported an increase in business trips related to training, research and education. This is higher than in Primary/Secondary industries where just 19% reported an increase.
- Businesses based in the Midlands (29%) and southern England (26%) were significantly more likely than those based in northern England (12%) to say that there had been a decrease in visits to construction and other sites in the mid-pandemic period.

## 2.7 Expected changes to purpose of business travel after the pandemic

For each of the specific purposes of domestic business travel post-pandemic, more managers expected the level of activity to increase than decrease in comparison to pre-pandemic levels. The predicted increase was greatest for client meetings with over four times as many expecting such travel to show an increase (49%), rather than to decrease or stop completely (11%).

Although around a third (35%) expected more trips to be made to attend conferences post-pandemic than was the case pre-pandemic, a fifth (18%) thought this will decrease or stop completely. In these terms travel to attend conferences was predicted to show the weakest increase on pre-pandemic levels.

Q7.2 Thinking of 12 months from now, assuming no Covid-19 restrictions are in place. What changes do you expect in the amount of **domestic** business travel for each of the following business activities, compared to before the pandemic (between March 2019 and February 2020)?



*Base: All who managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic AND autumn 2021 AND can anticipate their level of travel post pandemic (313).*

Half of the representatives of medium businesses thought there would be an increase in travel to exhibitions or trade shows (50%), or to visit other parts of their business (48%). Managers in large businesses also expected to see more travel (than pre-pandemic) relating to other parts of their business (43%). Reflecting the relative 'complexities' of such businesses, the corresponding figure among small enterprises was 28%.

## 3 International business travel – before, during and after the COVID-19 pandemic

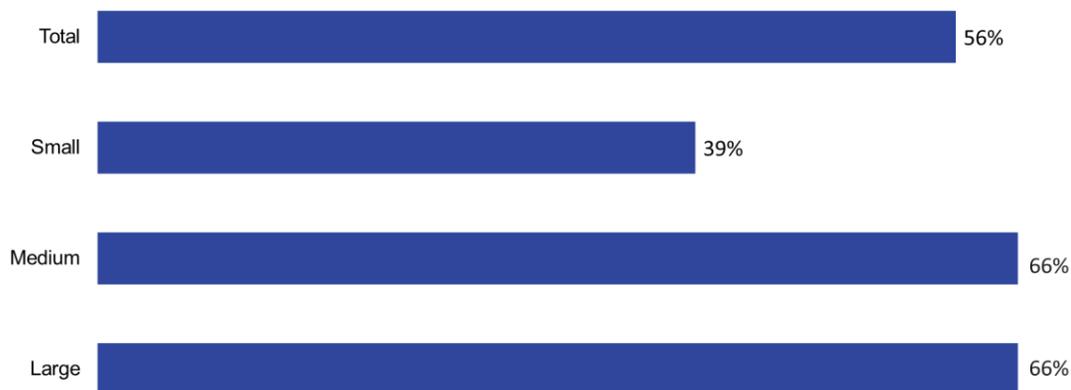
### 3.1 Impact of the pandemic on the proportion of businesses conducting international business travel

There had been a reduction in the proportion of companies conducting international business travel in autumn 2021, when compared with the pre-pandemic period. Under six in ten (56%) businesses that conducted international business travel pre-pandemic said employees in their organisation continued to do so in autumn 2021.

Large businesses (66%), medium businesses (66%), and companies in the Business Support and Finance sector (67%) were more likely than average (56%) to have continued to travel internationally in autumn 2021. Small businesses (39%) were less likely than average to have done so.

Looking ahead to December 2022, these findings suggest that the proportion of businesses conducting international travel will return to pre-pandemic levels. 100% of businesses that conducted international travel pre-pandemic expected employees in their organisations to travel internationally post-pandemic.

Q3.4. Did any of your organisation's employees make international business trips in the period since domestic restrictions were relaxed across the UK, from August to November 2021 – NET international



*Base: Q3.4: All managers and above with influence over business travel decisions where employees have travelled internationally pre-pandemic (340); Small business (73), Medium business (108), Large business (159).*

### 3.2 Impact of the pandemic on the proportion of employees making international business trips

In companies that continued international travel in autumn 2021, there had been a small (but not statistically significant) reduction in the proportion of staff travelling internationally for business when compared with the pre-pandemic period. In organisations able to estimate their level of travel,<sup>13</sup> an average (mean) of 22% of their employees travelled internationally for business in autumn 2021; before the pandemic, 27% of employees in these companies did so.

Post-pandemic these companies expected the proportion of employees travelling to remain at pre-pandemic levels. Organisations able to anticipate their level of travel post-pandemic<sup>14</sup> expected 27% of their employees to travel internationally for business.

Q2.2.2a Thinking of the period between March 2019 and February 2020. Approximately what percentage of all employees made **international** business trips during this period?

Q3.5.2a Thinking of the period since domestic restrictions were relaxed across the UK, from August to November 2021. Approximately what percentage of all employees made **international** business trips during this period?

Q5.3.2a Please think ahead to 12 months from now, assuming there are no Covid-19 restrictions in place. Approximately what percentage of all employees do you expect to make **international** business trips?



*Base: Q2.2.2a / Q3.5.2a / Q5.3.2a All managers and above with influence over business travel decisions where employees have travelled internationally pre-pandemic AND in autumn 2021 (210)*

*Base: Q5.3.2a All managers and above with influence over business travel decisions where employees have travelled internationally pre-pandemic AND in autumn 2021 AND can anticipate their level of travel post pandemic (158)*

<sup>13</sup> 25% of companies did not know what proportion of staff in their companies travelled internationally for business in autumn 2021 and 21% did not know what proportion did so pre-pandemic

<sup>14</sup> 25% of companies did not know what proportion of staff will be travelling internationally post-pandemic

### 3.3 Frequency of employees making international business trips

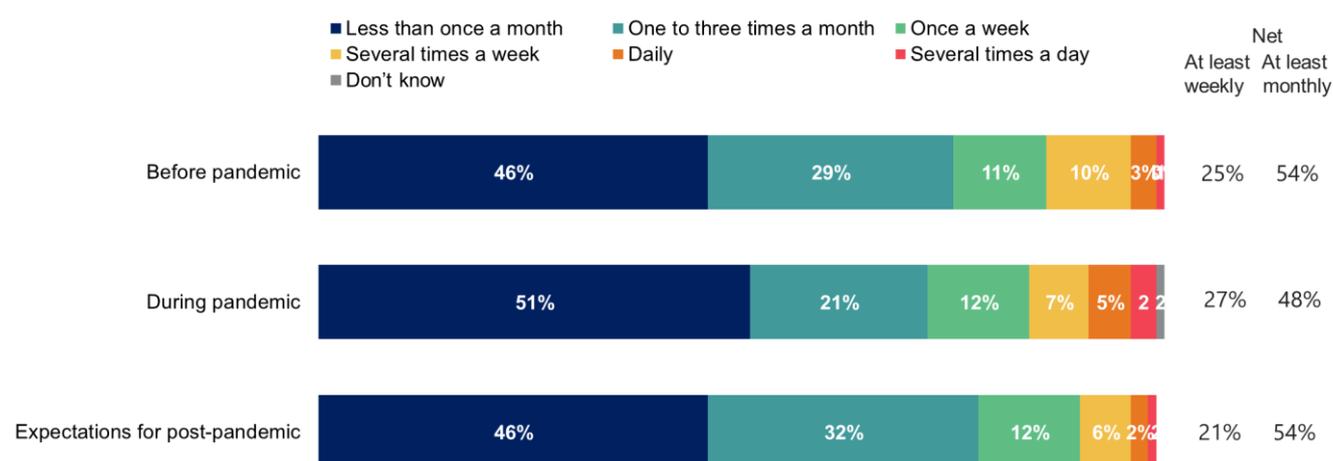
Amongst businesses that continued to conduct international travel in autumn 2021, there had been no change in the frequency of travel when compared to the pre-pandemic period. 27% of companies said employees travelling for business did so on average at least weekly in autumn 2021, 48% at least monthly and 51% less than once a month. Before the pandemic, these figures were 25%, 54% and 46% respectively.

Post-pandemic, companies that continued travelling in autumn 2021 expected their frequency of international business travel to remain at pre-pandemic levels. Amongst organisations able to anticipate their level of travel post-pandemic,<sup>15</sup> 21% expected staff who travel internationally for business to do so on average at least weekly, 54% at least monthly and 46% less than once a month.

Q2.2.2b. Thinking of all employees that made international business trips in the period between March 2019 and February 20, how often, if at all, did they do this?

Q3.5.2b Thinking of all employees that made international business trips from August to November 2021, how often, if at all, did they do this?

Q5.3.2b Thinking of all employees that you expect to make international business trips 12 months from now, assuming there are no Covid-19 restrictions in place, how often, if at all, will they do this?



Base: Q2.2.2b All managers and above with influence over business travel decisions where employees have travelled domestically and internationally pre-pandemic (210).

Base: Q5.3.2b All managers and above with influence over business travel decisions where employees have travelled internationally pre-pandemic AND in autumn 2021 AND can anticipate their level of travel post pandemic (158).

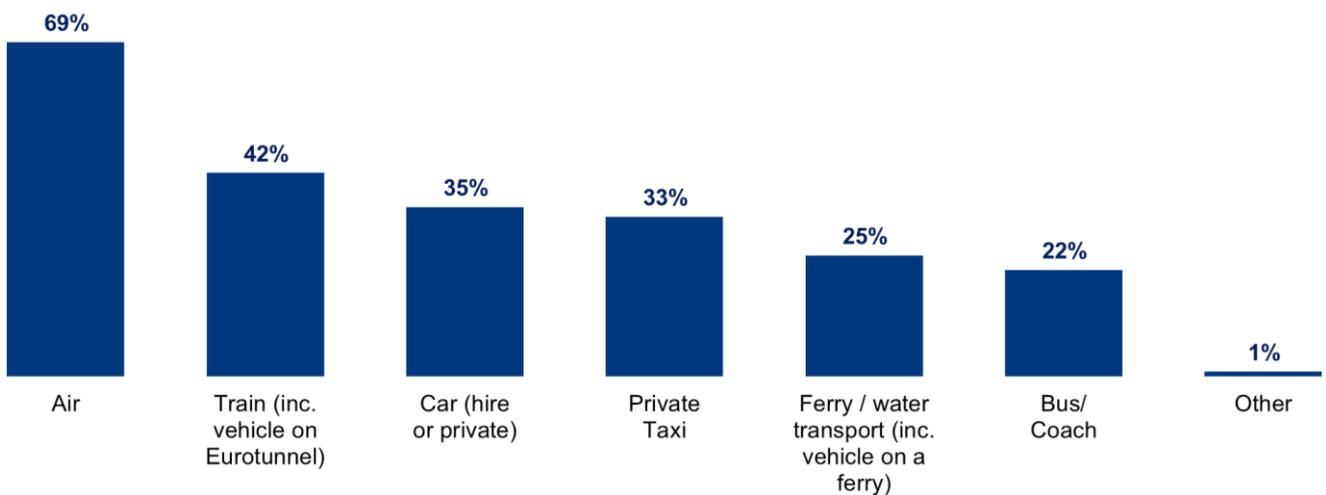
<sup>15</sup> 25% of companies did not know what how frequently staff in their companies will be travelling internationally post-pandemic

### 3.4 Mode of transport for international business trips

Companies that continued to conduct international travel in autumn 2021 were asked about the modes of transport employees used as their main mode of travel when taking international business trips.

Pre-pandemic, two-thirds (69%) of these companies said their international travel involved air travel. The use of air was higher than other modes of transport. Approximately one third of businesses reported that their employees travelled beyond the UK by train (42%), car (35%) or private taxi (33%). Around one in four said their employees had used ferry/water transport (25%) or bus/coach (22%).

Q2.3.2 Between March 2019 and February 2020, which of the following modes of transport did employees use for international business trips?



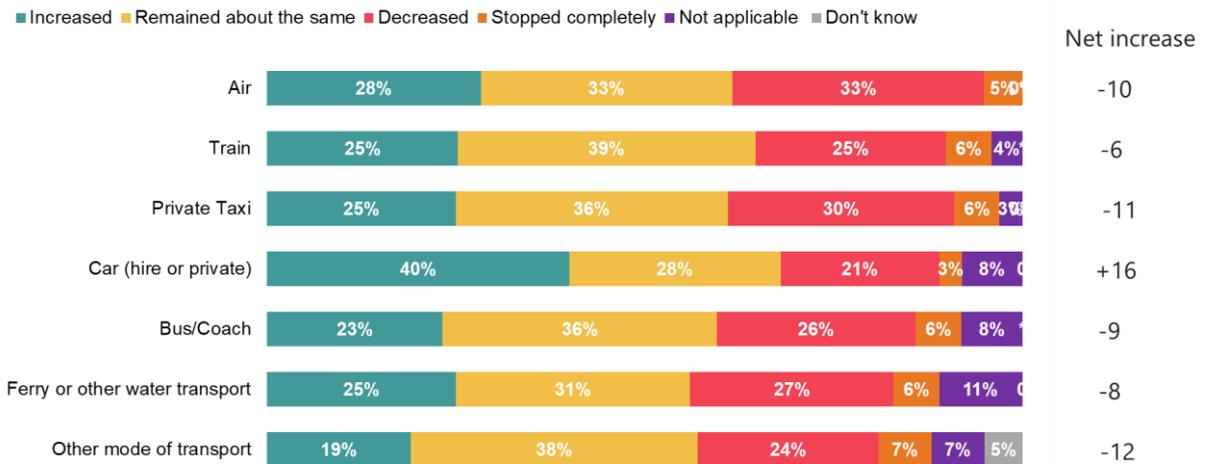
*Base: Q2.3.2 All managers and above with influence over business travel decisions where employees have travelled internationally pre-pandemic AND in autumn 2021 (210)*

### 3.5 Change in mode of transport for international business trips during the pandemic

When restrictions were relaxed in autumn 2021, approaching two thirds of these businesses (64%) reported that private or hire cars were being used to travel outside the UK to either the same (28%) or a greater extent (40%) than they had been pre-pandemic. The use of cars was the least likely to have witnessed a decrease or complete stop (24%).

Air travel was the mode of transport with the largest number saying use had decreased or stopped completely (38%).

Q3.6.2 - Since domestic restrictions were relaxed across the UK, from August to November 2021, what changes did you see in the amount of international business travel using each of the following modes of transport, compared to before the pandemic?

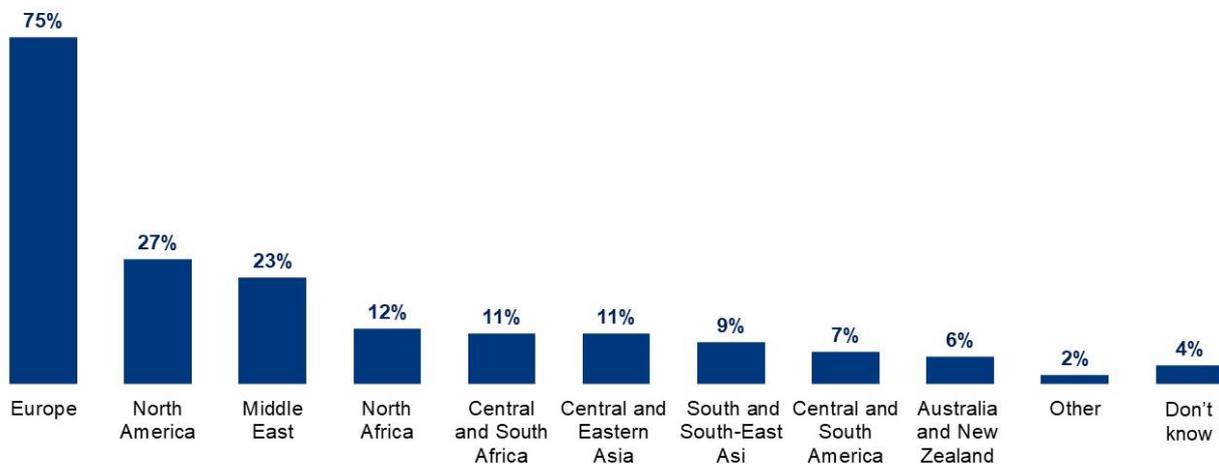


Base: All managers and above with influence over business travel decisions where employees have travelled internationally pre-pandemic AND in Autumn 2021 (210)

### 3.6 Destinations for international air travel during the pandemic

Respondents were asked which destinations, if any, employees in their organisations had taken international business trips to mid-pandemic. 75% of employees were in businesses that conducted international air travel to Europe, with North America (27%) and the Middle East (23%) also being amongst the most popular destinations. Business trips to other destinations were fairly evenly spread. Approximately one in ten said their employees had flown to North Africa (12%), Central and South Africa (11%), Central and Eastern Asia (11%) or South and South East Asia (9%) on business between August and November 2021. Just over one in twenty had taken flights to conduct business in Central and South America (7%) and Australia or New Zealand (6%).

Q3.7.2 In the period since domestic restrictions were relaxed across the UK, from August to November 2021. Thinking specifically about international business trips by air, which of these destinations, if any, have your employees taken international business trips to?



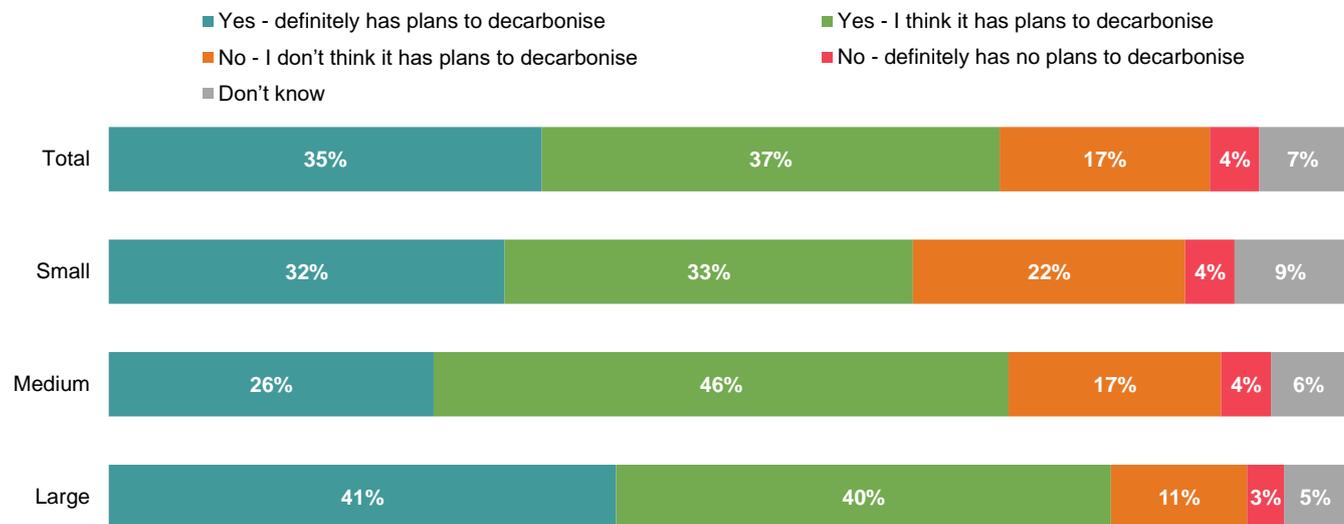
Base: All whose employees' air travel increased, decreased or stayed the same between pre-pandemic to August 2021-November 2021 (224).

# 4 Decarbonisation plans and implementation

## 5.1 Plans for carbon reduction

According to respondents, 72% of businesses had decarbonisation plans in place. Four in five (81%) large businesses had such plans in place, and this was more than in small businesses where around two-thirds (65%) had decarbonisation plans. Small businesses (26%) and medium businesses (22%) were more likely than large businesses (14%) to not have any plans in place.

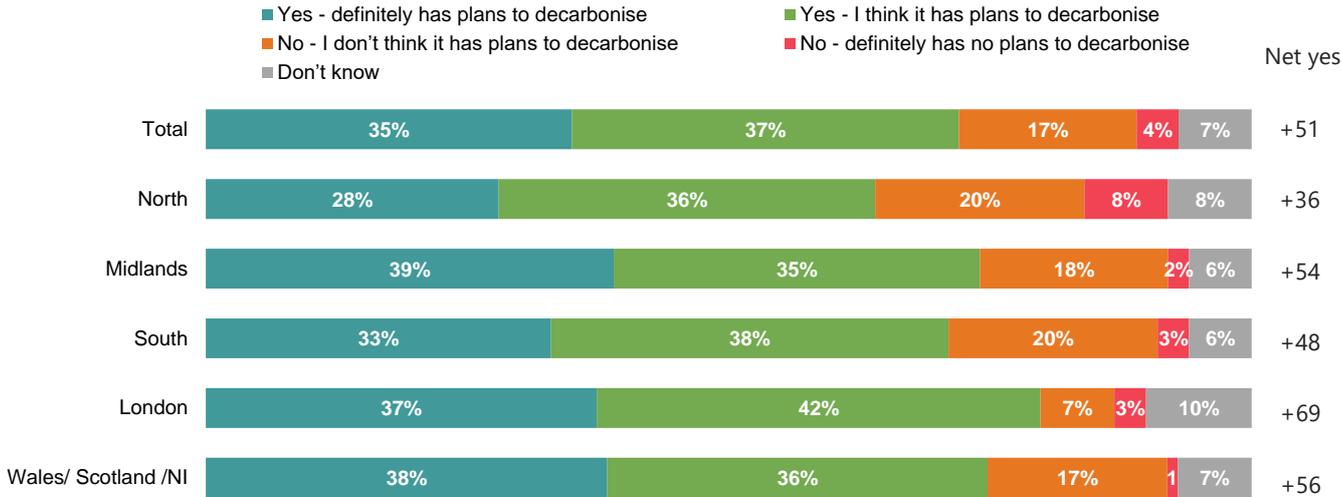
Q8.1 To the best of your knowledge, is your business planning to reduce the level of carbon dioxide produced by business activities in future?



*Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic (555); Small business (155), Medium business (173), Large business (227).*

Across the UK's regions, businesses in London (79%) were more likely than those in northern England (64%) to have plans to reduce the level of carbon dioxide produced by business activities. Only one in ten respondents from London-based businesses (11%) said their organisation did not have plans to decarbonise. The proportion of businesses in both northern and southern England without such plans (28% and 23% respectively) was much higher.

**Q8.1 To the best of your knowledge, is your business planning to reduce the level of carbon dioxide produced by business activities in future?**



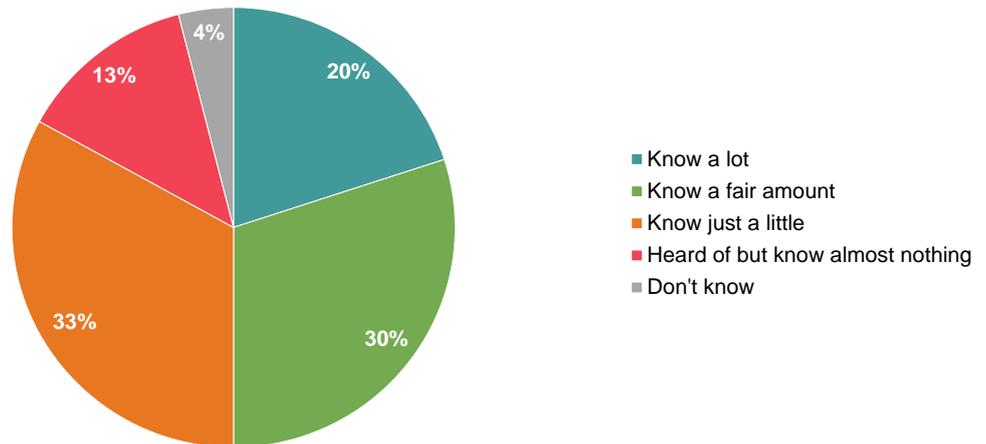
*Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic (555), North (131), Midlands (139), South (112), London (107), Wales/Scotland/Northern Ireland (66)\*. An asterisk (\*) indicates a small base size.*

Looking at travel patterns, those with employees engaged in international business trips were the most likely to have decarbonisation plans. Among those where international travel took place either pre-pandemic, or mid-pandemic, approximately eight in ten said their business had plans to decarbonise (77% and 81% respectively). The respective figures among those where international travel did not take place were 66% and 69%. Although the survey does not explain why this is, it could to some extent be related to size of business given that large businesses are more likely than small businesses to travel internationally.

## 5.2 Familiarity with organisation's decarbonisation plans

Amongst businesses that had plans to decarbonise, half (50%) of respondents said they knew either a lot (20%) or a fair amount (30%) about their organisation's plans.

Q8.2 How much, if anything, do you know regarding your organisation's plans to decarbonise business activities in future, if any?



Base: All whose business plans to decarbonise (408)

## 5.3 Specific actions to reduce number of business trips and their carbon emissions

### Decarbonisation measures already being implemented

All respondents were asked if their business had implemented any specific actions to help reduce the number of business trips, and their carbon emissions. Most businesses (93%) said they were taking one or more actions - few (just 7%) did not know.

The most common schemes in place to decarbonise business were allowing more home working (45%), substituting travel with video conferencing (40%), and allowing flexible work times (30%). Large businesses in particular were significantly more likely than average to offer flexible start and finish times (37% of large businesses said they have done this).

The chart on the next page shows the extent each of a number of specific actions had been implemented by businesses overall, as well as by size of business. As is seen in the chart, there were statistically significant differences in a number of the actions taken by size of business<sup>16</sup>. For example:

- While around one in four SMEs allowed flexible start and finish times, approaching two-fifths (37%) of large businesses did so.
- One in four medium and also large businesses (25% and 27% respectively) provided reserved electric vehicle parking bays for employees. However, just one in six (16%) small businesses did this.

<sup>16</sup> The small letters in the chart indicate a statistically significant difference by size of business. For example, 33% of large businesses have reduced the need for long-distance travel compared to 22% of medium business - this eleven points difference is statistically significant.

- One third (33%) of large businesses had reduced the need for international/ long distance travel. This compared to around one fifth (22%) of medium businesses.
- A fifth (21%) of small businesses incentivised their staff to use public transport. However, this rose to a third (32%) of large businesses.
- Twice as many medium as small businesses had reduced the availability of employee car parking (17% and 9% respectively).
- Large businesses were twice as likely as medium businesses to have reduced their overall travel budget (25% and 12% respectively).
- While 18% of small businesses, and 16% of large businesses had offset emissions from travel, this fell to just eight per cent of medium businesses.
- Respondents in small businesses were less likely than their counterparts in medium and large businesses to not know what specific actions their organisations had taken. Around one in ten (11%) respondents in small businesses did not know, compared to just one in twenty-five (4%) medium businesses, and just one in fifty (2%) large businesses.

Q8.3 Which of the following activities, if any, is your company **already implementing** to help reduce the number of trips / the carbon emissions of trips taken by all employees?

		Size of business		
		Small	Medium	Large
		(a)	(b)	(c)
Allow more home working	45%	45%	41%	48%
Provide video-conferencing facilities for employees to reduce their need to travel	40%	41%	34%	40%
Allow flexible start / finish times so employees can avoid peak-time travel	30%	27%	26%	37% a/b
Reduce the need for international/long distance travel	28%	27%	22%	33% b
Provide electric vehicle charge points for employees	28%	24%	28%	33%
Incentivise staff to travel by bicycle (or other active travel)	28%	25%	29%	31%
Incentivise employee ride sharing / car pooling	27%	25%	26%	30%
Incentivise staff to use public transport	26%	21%	25%	32% a
Help employees finance travelling by electric vehicles	23%	21%	24%	24%
Provide reserved electric vehicle parking bays for employees	21%	16%	25% a	27% a
Select travel providers that invest in sustainability	21%	19%	19%	25%
Reduce the length of supply chains (from suppliers and/or to customers)	20%	21%	18%	20%
Reduce the overall travel budget	19%	17%	12%	25% b
Offset emissions from travel	16%	18% b	8%	16% b
Reduce the overall size of the vehicle fleet	15%	14%	14%	18%
Directly provide employee transport to replace car journeys	13%	10%	18%	15%
Reduce the availability of employee car parking	12%	9%	17% a	13%
Don't know	7%	11% b/c	4%	2%

Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic (555); Small business (155), Medium business (173), Large business (227)

There were also some statistically significant differences by business sector and region. This includes

- Over half (53%) of those in Retail/Wholesale provided videoconferencing facilities for employees to reduce their need to travel. This compares to two-fifths (40%) of businesses overall.
- A third (32%) of those who work in Primary/Secondary industries helped their employees finance travelling by electric vehicles. This compares to around one in eight (13%) in Retail/Wholesale businesses.
- Retail/Wholesale businesses were twice as likely as businesses overall to incentivise employee ride sharing and carpooling (50% and 27% respectively). Businesses in this sector are also significantly more likely than all other sectors to have done this.
- While two-fifths (40%) of businesses in Wales, Scotland and Northern Ireland had reduced the need for international/long distance travel, fewer than three in ten (28%) business overall had done so. In northern England, fewer than one in four (23%) had done this.
- Business in Wales, Scotland and Northern Ireland had also been more likely than businesses as a whole to have reduced their overall travel budget (33% and 19% respectively).
- A third (33%) of businesses based in the Midlands provided electric vehicle charge points for their employees. In London, just one in five (19%) businesses did this.
- However, businesses in London are twice as likely as businesses overall to have reduced the availability of employee car parking (24% and 12% respectively).
- The selection of travel providers that invest in sustainability was of higher prevalence in Wales, Scotland and Northern Ireland (36%), and in London (31%) than in other UK regions, and when compared against businesses overall. Just a fifth (21%) of businesses overall had implemented this measure.
- Few businesses in southern England (7%) had reduced the overall size of their vehicle fleet. This was at least two to three times lower than in other UK regions including in Wales, Scotland and Northern Ireland (21%), and in northern England (20%).

Those who professed to know at least a fair amount about their business' plans to decarbonise were generally more likely than respondents overall to state that their organisation had already implemented a number of decarbonisation measures.

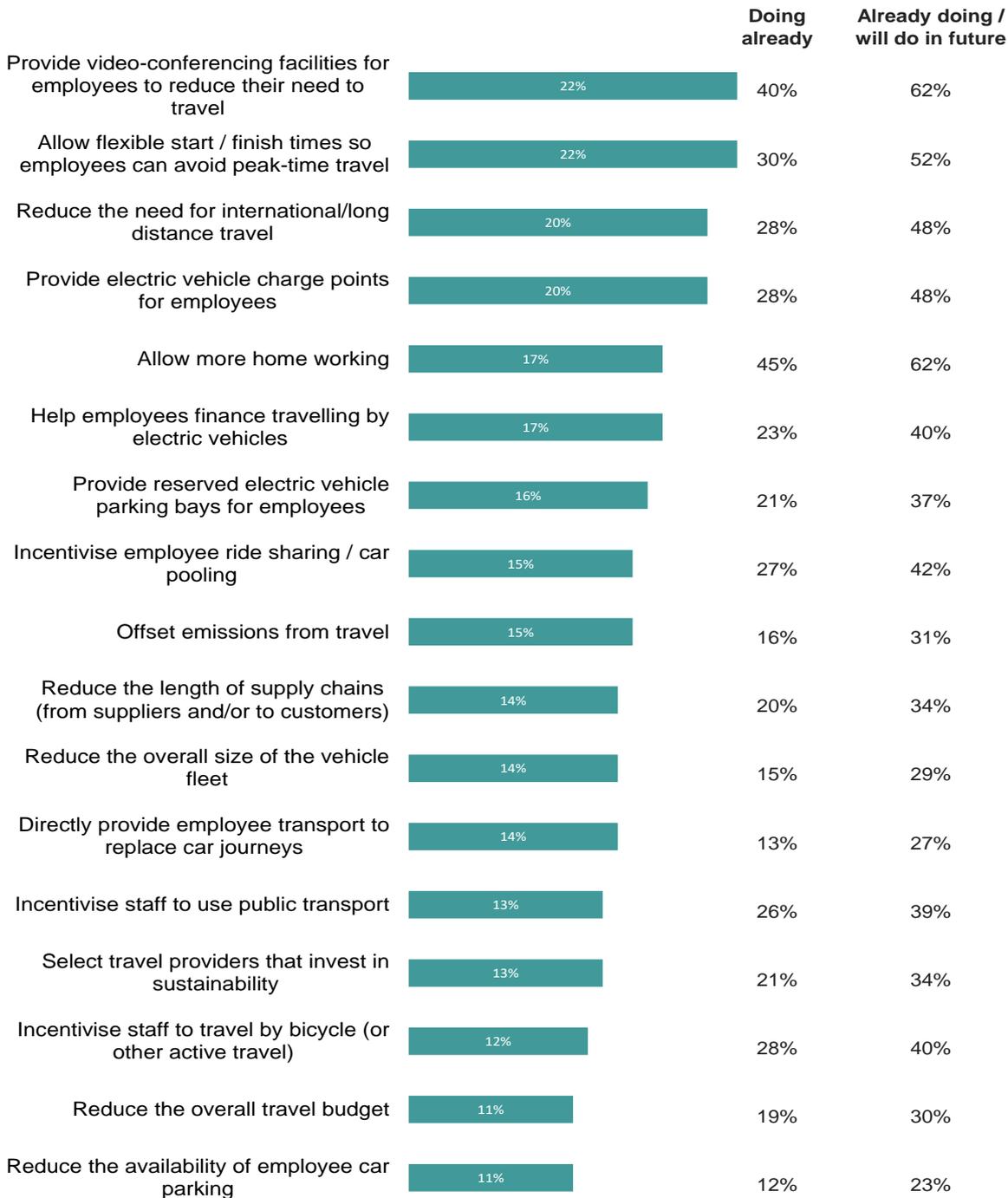
#### Plans to start implementing decarbonisation measures within the next 3 to 5 years

As well as being asked about decarbonisation measures already implemented, respondents were also asked about a range of specific measures their business had planned to implement within the next 3-5 years, but had not already done so.

Around a fifth of businesses said they planned to provide video-conferencing facilities (22%); offering flexible start and finish times (22%); reducing a need for international or long distance travel (20%), and to provide electric vehicle charge points for employees (20%). Other, less frequently cited planned measures included incentivising staff to use public transport (13%), or to travel by bicycle (12%), and reducing the availability of employee car parking (11%). Around one in seven respondents (15%) did not know which measures their business might implement within the next 3 to 5 years.

The following chart shows the extent a number of specific actions were expected to be implemented in businesses within the next 3-5 years, if not already implemented. To provide a more complete picture, the figure for each action already implemented is included, along with the combined figure for already doing and expect to be doing in the near future. This then shows that some actions were much more likely than others to have been implemented, or will be implemented in future.

**Q8.4 To the best of your knowledge, which, if any, of the following does your business have any plans to start doing over the next 3-5 years?** (Q8.3 Which of the following activities, if any, is your company already implementing to help reduce the number of trips / the carbon emissions of trips taken by all employees?)



*Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic (555):*

### Actions already doing or will be doing within the next 3-5 years

Looking collectively at what businesses had already implemented, or will implement in the next 3-5 years, the majority said they did or would provide video-conferencing facilities for employees to reduce their need to travel (62%), allow more home working (62%), and allow flexible start / finish times so employees can avoid peak-time travel (52%).

Just under half also said they were or would: reduce the need for international/long distance travel (48%); and provide electric vehicle charge points for employees (48%). The least likely steps to be taken were a reduction in the availability of employee car parking (23%); directly provide employee transport to replace car journeys (27%); and a reduction in the overall size of the vehicle fleet (29%).

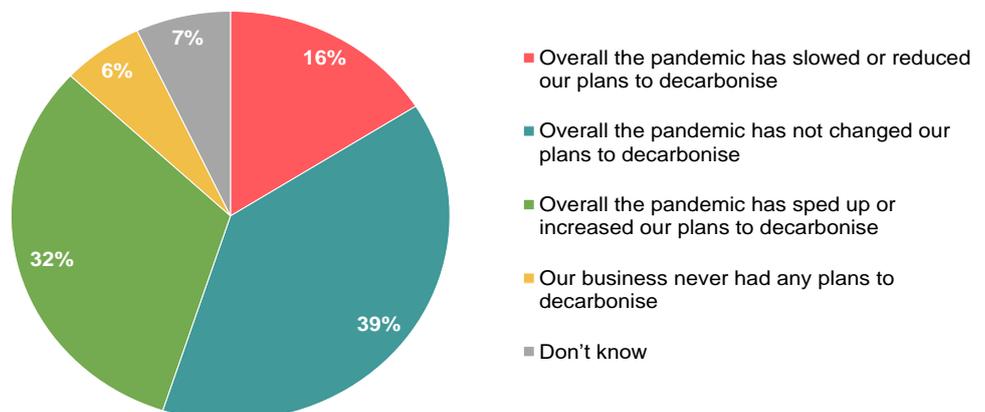
While perhaps not unexpected, those who professed to know at least a fair amount about their business' plans to decarbonise were generally more likely than respondents as a whole to state that their organisation had or would be implementing a number of decarbonisation measures. For example:

- While around three-fifths (62%) of all respondents cited video-conferencing and also more home working, this increased to almost seven in ten (69%) of those who were familiar with their business' plans to decarbonise.
- Approaching half (48%) of those surveyed mentioned a reduced need for international/long distance travel. However, this increased to two-thirds (67%) of those who were familiar with their businesses plans to decarbonise.
- Half (50%) of those most familiar with plans to decarbonise said that their business had provided, or had planned to provide reserved electric vehicle parking bays for employees. This compared to fewer than two-fifths (37%) of businesses overall.

### 5.4 Impact of the pandemic on speed of decarbonisation

By a ratio of two to one, the pandemic is said to have accelerated (32%) rather than slowed down (16%) businesses' plans to decarbonise. For two-fifths (39%) of businesses, the pandemic has not changed their plans. The pandemic was more likely to have sped up decarbonisation plans within large (37%) than medium businesses (25%), but otherwise there were no significant differences by size, sector, or region.

Q8.5 Which of the following best describes the way, if any, that the Covid-19 pandemic has changed your business' plan to decarbonise your business in general?



*Base: All managers and above with influence over business travel decisions where employees have travelled domestically pre-pandemic (555)*

Looking only at those who knew at least a fair amount about their business' plans to decarbonise (210 respondents), half (50%) stated that the pandemic had expediated their plans to decarbonise.

Approaching two-fifths (38%) thought that the pandemic had not changed their plans to decarbonise, while for around one in ten (11%) the pandemic had slowed or reduced their plans to decarbonise. As with the findings of all respondents, there were also no significant differences by size, sector or region.

# Appendices

## Respondent profile

Aspect	Unweighted	Weighted
<b>Size of business</b>		
Small	28%	48%
Medium	31%	13%
Large	41%	39%
<b>Region</b>		
North	24%	24%
Midlands	25%	27%
South	20%	20%
London	19%	16%
Wales/Scotland/N. Ireland	12%	13%
<b>Sector</b>		
Primary/Secondary Industries	19%	18%
Retail/Wholesale	8%	12%
Business Support/Professional Services/Information and Finance	29%	22%
Healthcare/Education/Transport	21%	29%
Other	23%	19%

## Statistical reliability

The final data from the survey are based on a weighted sample, rather than the entire population of UK businesses. Percentage results are therefore subject to margins of error, which vary with the size of the sample and the percentage figure concerned. While 555 businesses participated in the survey, the effective base size is 412 businesses<sup>17</sup>. All figures quoted in this section are based on effective base size.

For example, for a question where 50% of the 412 businesses included in the survey give a particular answer, the chances are 95 in 100 that this result would not vary more or less than 4.8 percentage points from the true figure – the figure that would have been obtained had the entire UK business population responded to the survey. The margins of error that are assumed to apply in this report are given in the following table.

### Margins of error (in percentage points) applicable to percentages at or near these levels

	10% or 90%	30% or 70%	50%
412 businesses overall	±2.9	±4.4	±4.8
144 small businesses	±4.9	±7.5	±8.2
161 medium business	±4.6	±7.1	±7.7
209 large businesses	±4.1	±6.2	±6.8

There are also margins of error when looking at subgroup differences. A difference from the average must be of at least a certain size to be statistically significant. For example, for a question where 50% of 412 businesses in the survey give a particular answer, and 55% of large businesses give the same answer, this finding would not be significant as the difference is less than 8.3 percentage points. However, if 50% of businesses in the survey give a particular answer to a question, and 60% of large business also give the same answer, the chances are 95 in 100 that this would be a statistically significant difference as it is greater than 8.3 percentage points.

The following table is a guide to these margins of error for the subgroups that we have referred to several times across this report.

### Differences required (in percentage points) from overall business result for significance at or near these percentage levels

	10% or 90%	30% or 70%	50%
<b>Overall total vs size of business</b>			
144 small businesses	±5.7	±8.7	±9.5
161 medium business	±5.5	±8.4	±9.1
209 large businesses	±5.0	±7.6	±8.3
<b>Size of business</b>			
144 small businesses vs 161 medium businesses	±6.8	±10.3	±11.3
144 small businesses vs 209 large businesses	±6.4	±9.8	±10.6
161 medium businesses vs 209 large businesses	±6.2	±9.4	±10.3

<sup>17</sup> In calculating these margins of error, the design effect of the weighting has been taken into account. This lowers the *effective* base size used in the statistical significance testing. The overall effective base size was 412 businesses.

## Ipsos UK standards and accreditations

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### ISO 27001

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



### ISO 9001

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



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# For more information

3 Thomas More Square  
London  
E1W 1YW

t: +44 (0)20 3059 5000

[www.ipsos.com/en-uk](http://www.ipsos.com/en-uk)  
<http://twitter.com/IpsosUK>

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