All change? Travel tracker

Wave 1 summary for the Department for Transport

June 2020

Ben Marshall, Lore Bizgan, Lewis Hill and Imogen Drew

Department for Transport

Ipsos MORI

All change? Travel tracker – Wave 1

- This summary presents analysis and headline findings from a UK-wide survey commissioned by the Department for Transport and undertaken during May-June 2020.

- The survey is the first in a series of four; we will undertake longitudinal quantitative and qualitative social and behavioural research up until Spring 2021. The objective of the wave 1 survey was to understand travel behaviour during the lockdown period as the basis for tracking changes in behaviour among the same group of people over time and as lockdown restrictions are eased.

Wave 1 survey methodology and context

- Ipsos MORI conducted an online survey involving **4,059 UK** adults aged 16-75 years old with sampling structured to secure at least **2,000** completed surveys in England, **1,000** in Scotland, **650** in Wales and **200** in Northern Ireland to allow for more robust comparisons between different countries within the UK, supplemented by a booster sample of BAME community groups. Fieldwork was undertaken between **15-22 May** in England, Scotland and Northern Ireland, and **28 May-4 June** in Wales.

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

- For the survey overall, we can expect an overall sampling tolerance of +/- 1.5 percentage points for a 50% finding at the ‘95% confidence interval’ (this will vary for sub-groups and geographies according to their sample sizes).

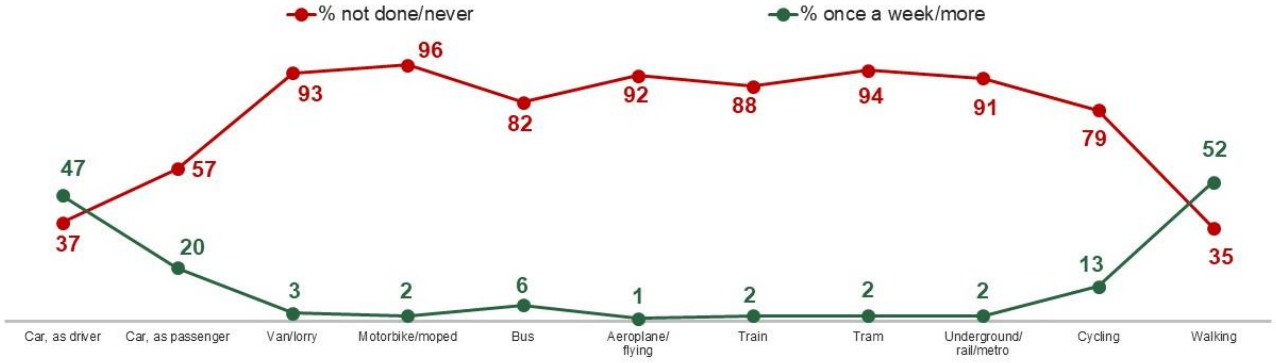
- Fieldwork took place during a period of high levels of compliance with lockdown measures across the UK. Covid-19 had substantial impacts on study participants; 9% were in a vulnerable or “shielded” group (12% said they were living with someone else who was); 38% of workers self-identified as a ‘key worker’; 17% said they have been put in the Government’s furlough scheme; 31% of those in work said they were told to work from home because of Covid-19 (See Appendix).

Lockdown changed behaviour; resulting in less travel, less car and public transport use, and more active travel

- The drop in the amount of travel during March, April and May is clear in comparisons between the reported frequency of using different modes before lockdown and during it. There were significant drops in the most common ways of travelling by public transport; a 24-percentage point reduction in the incidence of those travelling weekly by bus, 12 points for train travel, and 9 points for use of underground or metro services.

- **Private modes of transport and active travel** were the most common ways of getting around during lockdown; 63% drove a car during lockdown, 65% walked or wheeled all the way to a destination and 21% cycled. By contrast, high proportions of people did **not** get on a bus (82%) or a train (88%). Bus use was higher than train use; but only 6% made journeys by bus once a week or more frequently with even fewer, 2%, doing so by train.

During the 'lockdown' period between Monday 23rd March and Sunday 10th May, how often, if at all, did you personally travel by the following modes of transport?



Source: Ipsos MORI/DfT
Base: 4,059 UK adults, 14 May-4 June 2020

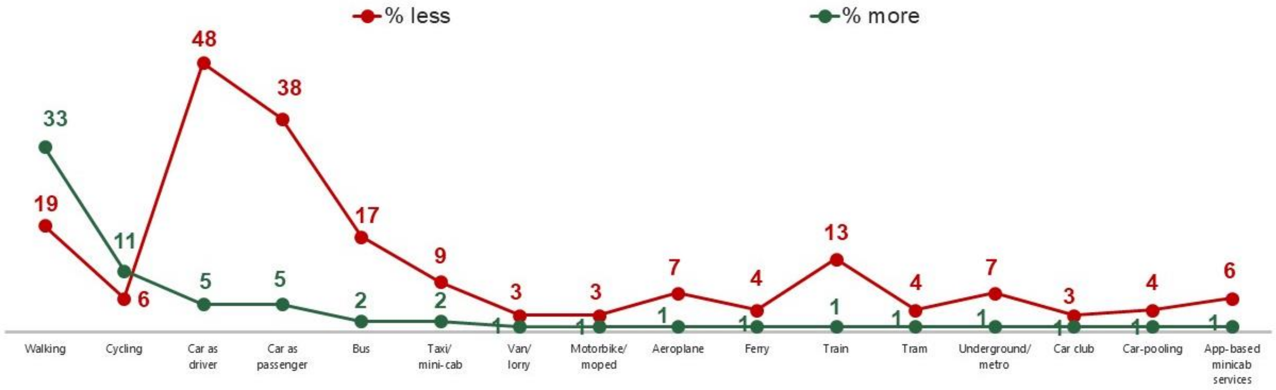
- **Food shopping** was the most common reason for travel during lockdown, with 76% of people driving and 60% of people walking to food shops. A further 23% went on food shopping trips on behalf of others by car.

- Commuting and business travel were reasons for travelling for 25-30% of car drivers, van drivers, bus, train and underground/metro users. In total, 13% of the UK population **travelled to work** by car, 5% walked, 4% made journeys by bus, 2% by train, 2% by underground/metro, and 1% cycled.

- **During lockdown travel reduced significantly**, with 61% of people using cars (either as driver or passenger), 58% taking buses and 56% of people using trains less often or not at all compared to previously. Working patterns changed; four in ten adults, 40%, say they worked at home more during lockdown.

- By contrast, 11% reported cycling a lot or a little **more** than before lockdown as did 33% reported walking/wheeling all the way to a destination. Most strikingly, those who *did* cycle during lockdown for leisure, recreation or keeping fit, were twice as likely to say they cycled **longer distances** compared to earlier in the year than to say they cycled shorter distances (although more reported cycling similar distances compared to previously). These patterns were also evident for walking/wheeling for leisure.

During the 'lockdown' period between Monday 23rd March and Sunday 10th May, would you say you travelled less often by this mode of transport than you did previously because of coronavirus, more often by this mode, or was there no change in how often you used this mode?



Source: Ipsos MORI/DfT
Base: 4,059 UK adults, 14 May-4 June 2020

Lockdown created changes in shopping, recreation, commuting and travel plans

- In addition to travelling for food shopping and recreation/keeping fit, **working from home** was also an important reason for changes in behaviour. Of those in work, 53% say they worked from home during lockdown (significantly higher than the 38% who said their employers allowed home working before coronavirus) and 47% said they didn't. A third (33%) travelled to their place of work.

- People also shopped differently. Eight in ten, 82%, say they generally did **fewer shopping trips** while 59% shopped online to purchase products they would normally buy in-store and 29% recalled using home delivery for supermarket shopping more than they would normally do (19% said they did this on behalf of others).

- Six in ten, 60%, said that during lockdown they **shopped closer to home** more than they would normally do although 46% recall making fewer local trips overall during lockdown – suggesting perhaps that they were doing larger shops less frequently – with a third, 34%, making more local trips. 45% say they avoided travel at peak times.

- Lockdown caused significant disruption to people's existing travel plans. More than a third of adults said they had plans to fly abroad (35%) or to make a long-distance car journey in the UK (34%) which they had either **cancelled or postponed**, or had had their plans cancelled by a travel company. One in five (20%) had plans to travel by train for leisure cancelled or postponed in this way too. Smaller proportions had plans cancelled or postponed this way for travel within the UK (12%), coach (9%), ferry (8%) or going on a cruise (6%).

Indications of continued private and active travel in the short-term with deep hesitancy about using public transport

- At the time of survey fieldwork, most expected to **maintain lockdown travel-related behaviours**. While some, 10%, expected to work at home *less*, 14% expected to do this *more* in the next 4 weeks (shown in Table 1 below)[1]. This pattern finds echoes in the 12% anticipating travelling to their place

[1] Reflecting fieldwork dates, the four weeks reference period extends to up until around mid/late June in England, Scotland, and Northern Ireland (where fieldwork was undertaken 15-22 May), and late June/early July in Wales (fieldwork took place between 28 May-4 June).

of work more than they did during lockdown, counterbalanced by the 15% who think they will do *less* of this.

Table 1: Behaviour during lockdown/next 4 weeks (selection)	**% done during lockdown**	% will do **more often** - next 4 weeks	% will do **'the same'** - next 4 weeks
Work at home	40	14	56
Travel to place of work	22	12	54
Avoid travelling at peak times	45	18	62
Exercise in your home/garden, for example, including using online tutorials/videos	48	16	61
Exercise outside your home by cycling	21	11	58
Exercise outside your home by running or jogging	29	14	61
Exercise outside your home by walking	78	31	56
Shop online to purchase products you would normally buy in-store	59	20	63
Shop closer to home	60	22	65
Go food shopping on behalf of others	39	9	61
Do online food shopping on behalf of others	19	7	58
Do fewer shopping trips in general	82	14	60

Source: Ipsos MORI/DfT, 4,059 UK adults (online), 14 May-4 June

- Commuting and working at home are likely to be important factors. Four in ten of those in work, 40%, say that their job means **working at home is not possible**. Those in work are more likely to disagree than agree with the statement 'I can do all my work from home just as easily as I could at my place of work before the lockdown'. While 70% expect to be working at home as often, or even more often, over the next four weeks, just 29% say they would *like* to do this (shown in Table 2 below).

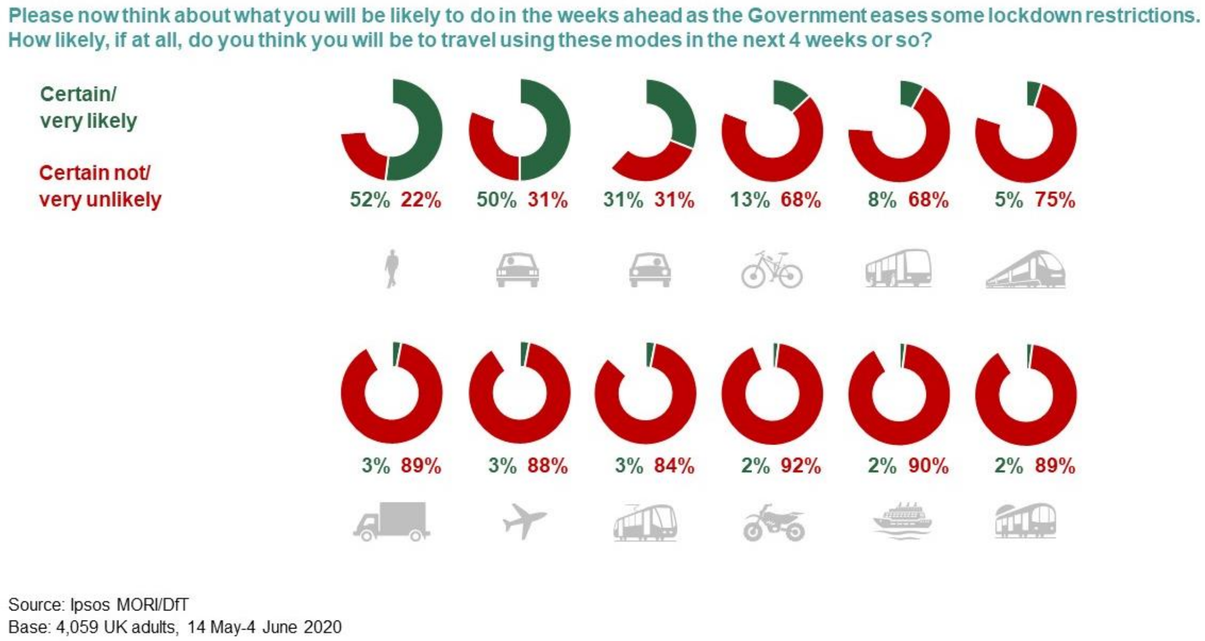
Table 2: Behaviour during lockdown/would like to do next 4 weeks (selection)	**% done during lockdown**	% would **like to do/continue to do** - next 4 weeks (ranked)
Exercise outside your home by walking	78	55
Do fewer shopping trips in general	82	39
Shop online to purchase products you would normally buy in-store	59	38
Avoid travelling at peak times	45	32
Shop closer to home more than you would normally do	60	32
Work at home	40	29
Exercise in your home/garden, for example, including using online tutorials/videos	48	27
Use home delivery for supermarket shopping more than you would normally do	29	24
Exercise outside your home by running or jogging	29	19
Exercise outside your home by cycling	21	18
Travel to place of work	22	16
Go food shopping on behalf of others	39	13

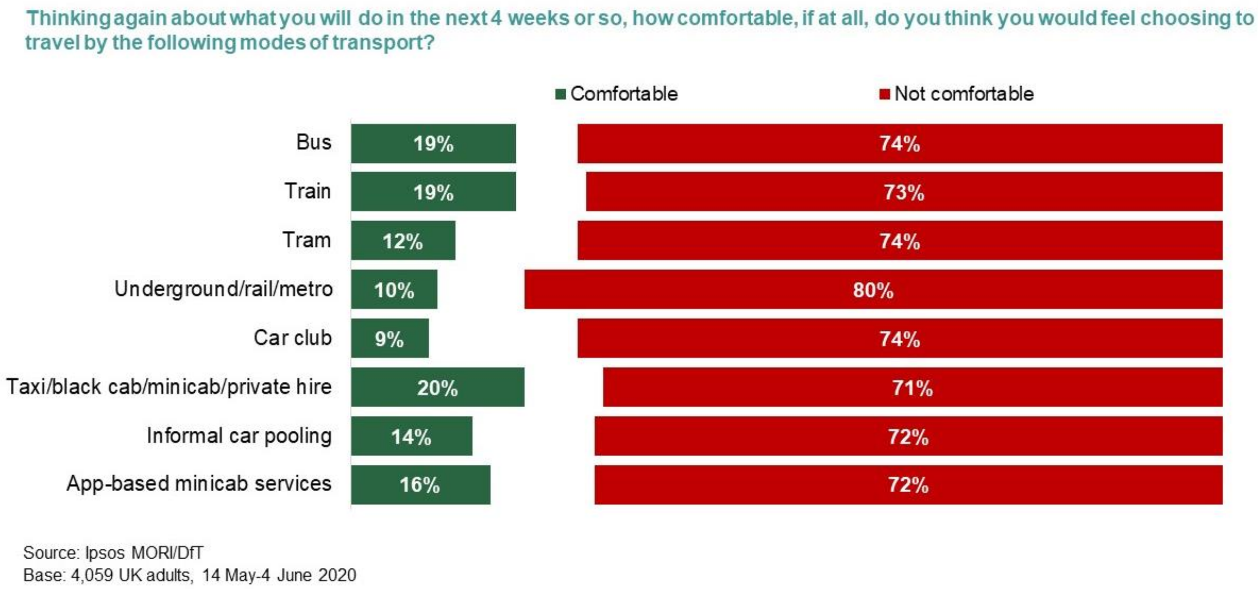
Source: Ipsos MORI/DfT, 4,059 UK adults (online), 14 May-4 June

- The most commonly anticipated ways of travelling in the next four weeks are walking/wheeling all the way to a destination followed by driving by car, reflecting high levels of ownership (80% of our sample had access to a car, 38% to a bicycle). Half, 52%, think they are certain or very likely to walk to a destination, with a further 19% considering this to be fairly likely. Most anticipate driving; 50% think they are certain or very likely to do this, 13% fairly likely.

- Expected use of private modes **contrasts sharply with public transport modes**; 8% think they are *certain or very likely* to travel by bus in the next four weeks, 5% by train and 3% by underground or metro. While only a fifth, 19%, of those in work think it is ‘already’ or will be the ‘right time’ to commute by public transport in the next month, 48% think the same of doing so by car.

- Seven in ten, 70%, say they would be not very or not at all comfortable traveling by bus, train, tram and underground rail/metro services. Six in ten, 59%, say they would be *not at all* comfortable travelling by underground/metro. Taxis, car clubs, car-pooling and app-based minicab services fare only a little better.



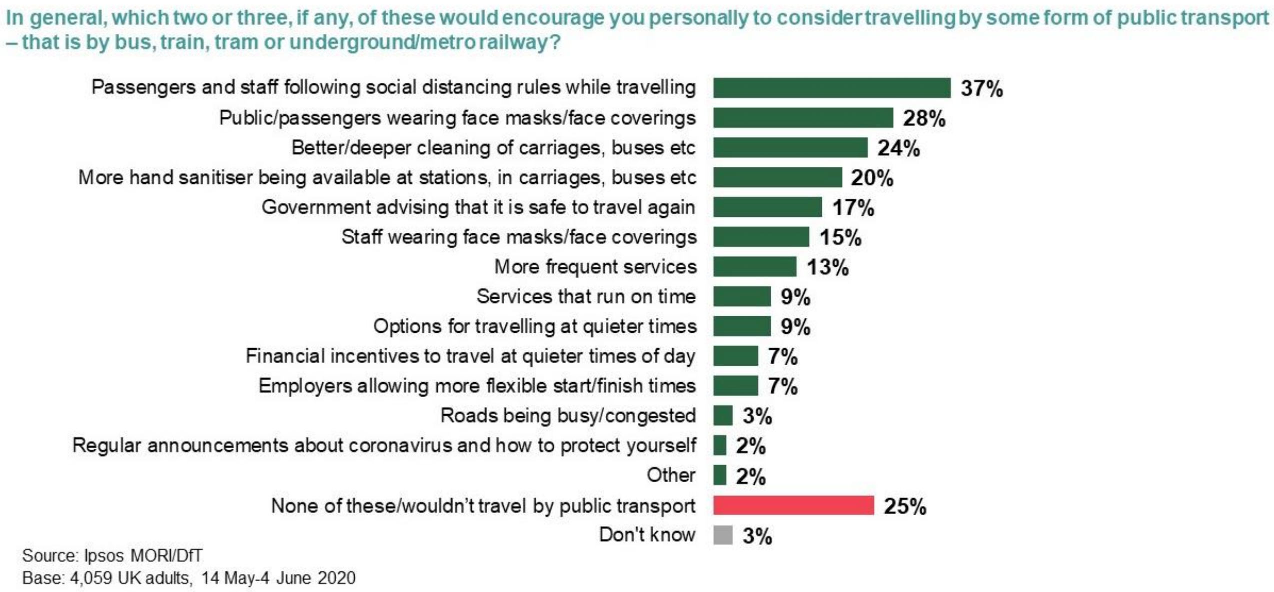


- The variation in levels of confidence travelling by different modes is also evident in the proportion of those who travelled by bus a lot or a little **less** during lockdown, with 25% who say they are certain or very likely to travel that way in the next four weeks. This is better than the equivalent 13% among those who travelled less by train but compares to 73% of those who drove a car less during lockdown. Active travel might persist, at least in the short-term; 66% of those who cycled **more** during lockdown are certain or very likely to travel this way in the next four weeks, as are 77% who walked more.

- Lower income groups (households with an annual income of less than £16,106) - who are among those more frequently using public transport before lockdown and more reliant on it - are, relatively, a little more comfortable with the idea of travelling by public transport. However, most are uncomfortable – 67% in terms of travelling by bus, 69% by train and 77% by underground/metro.

More infrequent active travellers before lockdown are even more uncomfortable – 80% in terms of bus, 79% train, 72% underground/metro.

- Passengers and staff following **social distancing rules** while travelling (at bus stops, on platforms, and in stations) are most commonly chosen from a list of thirteen actions as most likely to encourage use of public transport – by 37% of people overall and 43% among those who travelled by public transport once a week or more often before lockdown.



- Weekly or more frequent users of public transport also prioritise the wearing of **face masks/face coverings** (33%) and **better/deeper cleaning** of carriages, buses etc. (31%). However, hesitancy is evident in 11% (25% of the wider public) saying that **none** of the measures would offer encouragement.

Staycations, more sustainable travel or a return to pre-lockdown travel?

- The survey's results point to several possible implications for travel behaviour, for example:
  - many still expect to **avoid public transport** in 12 months' time;
  - many hope to spend more time using **active travel modes**, particularly walking;

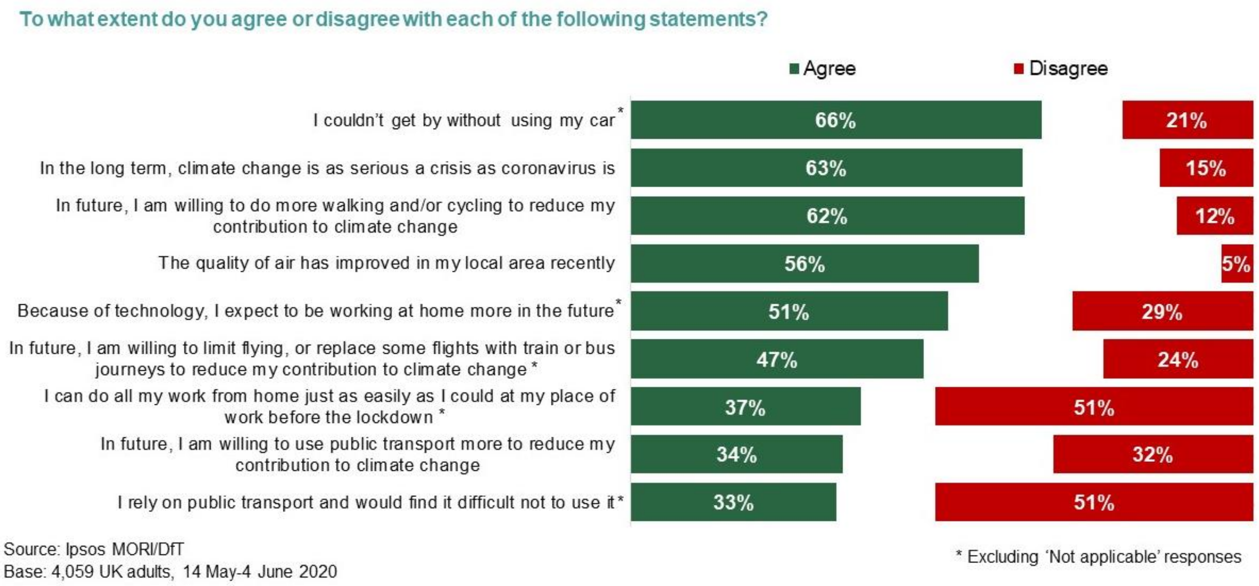
- Many expect to **spend holidays in the UK** rather than go abroad and expect to use international travel modes less often (2020 could see an increase in demand for day trips as 'staycations').

Table 3: Anticipated duration before doing travel behaviours (selection)		Within the next month or so	In the next 3-6 months	In the next 1-2 years
Day trips in the UK	Go on a day-trip, day out in the country I live in (Wales, Scotland, Northern Ireland or England)	27%	40%	13%
	Go on a day-trip, day out elsewhere in the UK	19%	42%	16%
Longer leisure trips in the UK	Go on holiday in the country I live in (Wales, Scotland, Northern Ireland or England)	10%	43%	23%
	Go on holiday elsewhere in the UK (outside of the country I live in)	7%	33%	30%
Leisure trips abroad	Go on holiday in Europe	4%	24%	40%
	Go on holiday outside Europe	3%	17%	38%

Source: Ipsos MORI/DfT, 4,059 UK adults (online), 14 May-4 June

- Thinking about the future more generally, the survey suggests that there could be some positive behavioural impacts from a sustainability perspective. There is a high degree of self-reported **willingness to change behaviour** in response to the long-term threat. Many say they are willing to do a range of things to reduce their contribution to climate change, reflecting a recognition that the long-term threat posed by climate change is as serious as coronavirus in the long-term (63% agree, 15% disagree).

- Many also expect, however, that, eventually, they will travel just as much as they used to. Even in the next four weeks, 34% of those with access to a bicycle or e-bike say they *won't* cycle. There are also some behaviours which are likely to be 'more sticky'. For example, car dependence among the public is high; two-thirds of those living in households with a car believe they could not get by without using it:



Geography and demography: many similarities, some differences

- Differences between geographies and groups are likely to reflect numerous, overlapping factors – for example, income levels, ethnicity, and urbanity intersect with car ownership and use of public transport, as well as local context such as the provision of transport infrastructure and services. For example, those without access to either a car or a bicycle/e-bike – and thus likely to be relatively more dependent on public transport – are disproportionately drawn from the following groups:
  - 49% are not in work compared to 37% of the UK population (based on this survey)
  - 40% are living in lower income households (annual income of less than £16,106) compared to 24%
  - 26% live in London compared to 14%
  - 24% are aged 25-34 years old compared to 19%
  - 17% are from BAME groups compared to 13%
  - 12% are in Scotland compared to 8%

- Travel behaviour **has been similar** across the different parts of the UK during the lockdown period but people living in Wales and Northern Ireland (NI) drove significantly more frequently; over half (52%) of those in Wales and two-thirds (66%) in NI made a journey by car as a driver once a week or more often compared to 46% in England and 47% in Scotland. Those living in Wales and NI were also particularly likely to say they reduced their driving by a little or a lot during lockdown – 55% and 58% respectively, compared to 47% in Scotland and 48% in England – and to be more certain/very likely that they will be driving in the next four weeks.

- Train use during lockdown was relatively high in England but still, even there, only 12% travelled this way during lockdown. Use was higher among BAME groups, those living in urban areas and those with access to a car, but in contrast to buses, there was no difference in levels of train use between different income groups.

- Non-use of buses was also relatively low among BAME groups, lower income groups and those without access to a car. A quarter, 25%, of 16-34 year olds say they used a bus during the lockdown period, much higher than the 17% and 12% of 35-54 and 55-75 year olds.

- Younger adults aged 16-34 are twice as likely than the oldest age group to say they cycled a little or a lot more often during lockdown (16% compared to 7%). Those in work and higher income households are also relatively more likely to report having done so.

- Coronavirus and the lockdown will have impacted on groups differently, leading to some differences in travel behaviour. For example, the following groups were relatively more likely than the population as a whole to have **travelled to a place of work** during the lockdown (22% of people across the UK did this):

  - 28% in Northern Ireland
  - 28% in London and the South East
  - 26% of those from BAME groups
  - 26% of 25-34 and 45-54 year olds
  - 26% of medium/higher income households
  - 24% of men

Appendix – Sample profile

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

Population group	Sample size (unweighted)	Unweighted %	Weighted %
UK adults aged 16-75	4,059	100	100
England	2,184	54	84
Scotland	1,016	25	8
Wales	655	16	5
Northern Ireland	204	5	3
Urban	2,939	80*	84*
Rural	699	19*	16*
Male	1,924	47	49
Female	2,122	52	51
16-24	494	12	14
25-34	777	19	19
35-44	721	18	16
45-54	775	19	19
55-75	1,292	32	31
Working full-time/part-time	2,613	64	63
Not working	1,446	36	37
BAME	448	11	13
Up to £16,106 (‘lower’)	666	19*	24*
£16,106-£39,999 (‘medium’)	1,542	44*	45*
£40,000+ (‘higher’)	1,267	36*	31*
Long-standing mental or physical health condition or illness	1,517	37	37

Where percentages do not sum to 100, this may be due to computer rounding
*indicates percentages based on all answering/data available

4%, say they have become unemployed since the outbreak, only slightly higher than the 3% who have restarted working.

Among those currently in work: 38% identified themselves as a ‘key worker’ (24% of all adults); 31% said they had been told to work from home because of Covid-19; 25% reported that their workplace/office has been closed due to concerns; 17% said they have been put in the Government’s furlough scheme; 16% said their workplace/office remains unchanged and they worked there during lockdown; 14% had their pay reduced; 10% had their hours reduced as a result of Covid-19.

In terms of working from home before Covid-19: this was not possible according to 40% of those in employment with a further 19% saying it was not offered by their employer; 38% said working at home was offered all or some of the time (19% each); more disagreed than agreed that, before the lockdown, they could do 'all of their work from home just as easily as at their place of work' (48% to 33%).

Appendix B – Statistical reliability

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

Table B.1 shows that we can expect an overall sampling tolerance (this refers to the upper and lower limit of error) of up to +/- 1.5 percentage points at the '95% confidence interval' for a 50% finding the survey overall.

Table B.1: Survey sampling tolerances: overall level

Size of sample on which survey result is based	**Approximate sampling tolerances applicable to percentages at or near these levels**		
	10% or 90%	30% or 70%	50%
1,000	1.9	2.8	3.1
2,000	1.3	2.0	2.2
4,059	0.9	1.4	1.5

For example, with a sample size of 4,059 where 27% say that they have travelled by car, then the chances are 19 in 20 that the 'true' value (i.e. the one which would have been obtained if the whole UK population had been interviewed) will fall within the range of +1.4 percentage points from the survey result (i.e. between 28.4% and 25.6%).

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

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

	Differences required for significance at or near these percentage levels		
Size of sample on which survey result is based	10% or 90%	30% or 70%	50%
2,184 vs. 1,016 (England vs. Scotland)	3	4	4
1,924 vs. 696 (urban vs rural)	3	5	5

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

Ipsos MORI's standards and accreditations

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

ISO 20252

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

ISO 27001

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

ISO 9001

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

Market Research Society (MRS) Company Partnership

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

Data Protection Act 2018

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

For more information

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

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

3 Thomas More Square
London
E1W 1YW

t: +44 (0)20 3059 5000

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

About Ipsos MORI Public Affairs

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