



Rail commuting and flexible season tickets

April 2021

Introduction

There has been much talk about Covid-19 changing commuting patterns in the future. Is working from home here to stay or will we see a drift back to office life once we are finally past this virus? We wanted to get a sense of how Covid-19 may have changed attitudes and what this might mean for commuting by rail in the future.

In order to get the best sense of how attitudes may have changed we focused on people who used to be regular commuters by rail but who expect to have a degree of choice as to whether they continue to work from home in future or get back on the train. What was their working pattern before Covid-19 and what would they expect it to be in the future? This is not to ignore those who have to physically attend their place of work all the time in order to do their job - these people will have little option but to continue as before. But by focusing on those who have a choice we can get a sense of behavioural change. Many will have been 'captive commuters' of old with little real choice other than to get on the train. Now that they have some discretion what will they choose?

Significant changes to commuting patterns will have a significant effect on the railway. It will impact on levels of demand and crowding, service frequencies and revenues. We wanted to look at the impact on ticketing. What tickets did these commuters buy in the past, and what might suit their needs better in the future. In particular, we wanted to know whether a more flexible season ticket would be attractive.

This report sets out our findings.

Summary of key findings

- Working from home is now a genuine option for many people:
 - Almost nine in 10 (86 per cent) of those who used to commute by rail say they do not physically need to attend their workplace all the time in order to do their job.
 - People expect to work from home more in future: 88 per cent of those who do not have to physically attend their place of work all the time say that they expect to work from home at least some of the time in the future. This compares with 44 per cent who worked from home some or all of the time prior to March 2020.
 - Employers are generally supportive of working from home. Seven out of 10 of those who expect to work from home at least some of the time in future say their employer is supportive of staff working from home. Only five per cent say their employer is unsupportive.
- Commuting patterns and frequency could change significantly:
 - There is a significant drop in those who say they will commute five days a week in future – from 43 per cent pre Covid to 12 per cent post Covid. Those saying they will commute four days a week has also dropped, from 24 per cent to nine per cent.
 - There is an increase in those saying they will commute from one to three days a week. Those saying they will commute one day a week has increased from nine per cent pre Covid to 24 per cent in future; those commuting two days has increased from 10 per cent to 31 percent, and for three days from 14 per cent to 19 per cent.
- Among future rail commuters, who do not need to physically attend their place of work all the time, the ability to see and to be with colleagues is the biggest driver of a desire to return to the workplace.

Summary of key findings

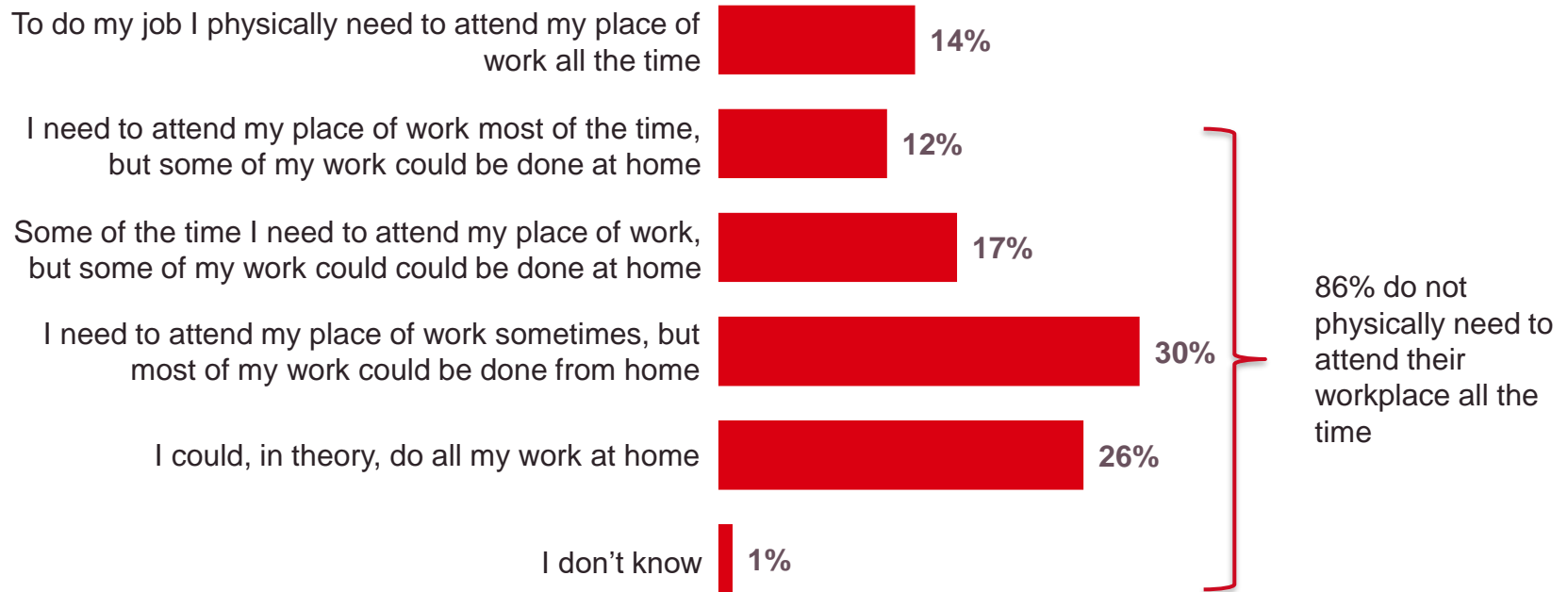
- Changing working patterns would have a big impact on rail ticketing:
 - There is a noticeable shift away from buying annual and monthly season tickets in future. Prior to Covid-19, 35 per cent of those who previously commuted by rail (and do not physically need to attend their workplace all the time to do their job) used an annual season ticket to make this journey - just 5 per cent expect to use this type of ticket in the future. For monthly seasons the drop is from 16 per cent to 5 per cent.
 - The numbers planning to use an Anytime Single/Return have increased, from 16 per cent to 29 per cent.
- Flexible season tickets are attractive to passengers and could make people travel more:
 - Nearly eight out of ten (79 per cent) of those who previously commuted by rail and who do not need to physically attend their workplace all the time say that a flexible season ticket option would be attractive to them in the future.
 - Just over a third (36 per cent) of those who previously commuted by rail and who do not need to physically attend their workplace all the time say that the availability of a flexible season ticket will make them more likely to travel to or from work in the future. Increasing the potential number of journeys made (for instance in making two trips to the workplace rather than one in a week) could potentially also increase overall revenue for the railway.

Background and sample definition

- The Transport Focus commuting survey was sent out to 13,551 people on our Transport User Panel in November. The survey closed on 30 November with 3165 having submitted a response (23 per cent response rate).
- Those who were previously, or are currently retired, or not working and not seeking work were screened out of the survey. Those who are currently students were also screened-out, while those currently not working but seeking work, or those currently furloughed did answer questions on their expected future commuting behaviour.
- The starting point for this report are the 1294 respondents who used rail as their main mode of transport to or from work before March 2020. Of these respondents, 875 do not have to physically attend their place of work and also expect to use rail to make their commute to or from work in the future. This subset of future rail commuters is the focus of this report.
- In relation to interpretation of the findings in this report, please note that data is unweighted and therefore results should be seen as indicative of this subset of commuters rather than statistically representative of them.

Attitudes, behaviours and expectations

86 per cent of those who previously commuted by rail do not physically need to attend their workplace all the time. 79 per cent of these commuters will use rail to make these journeys in the future

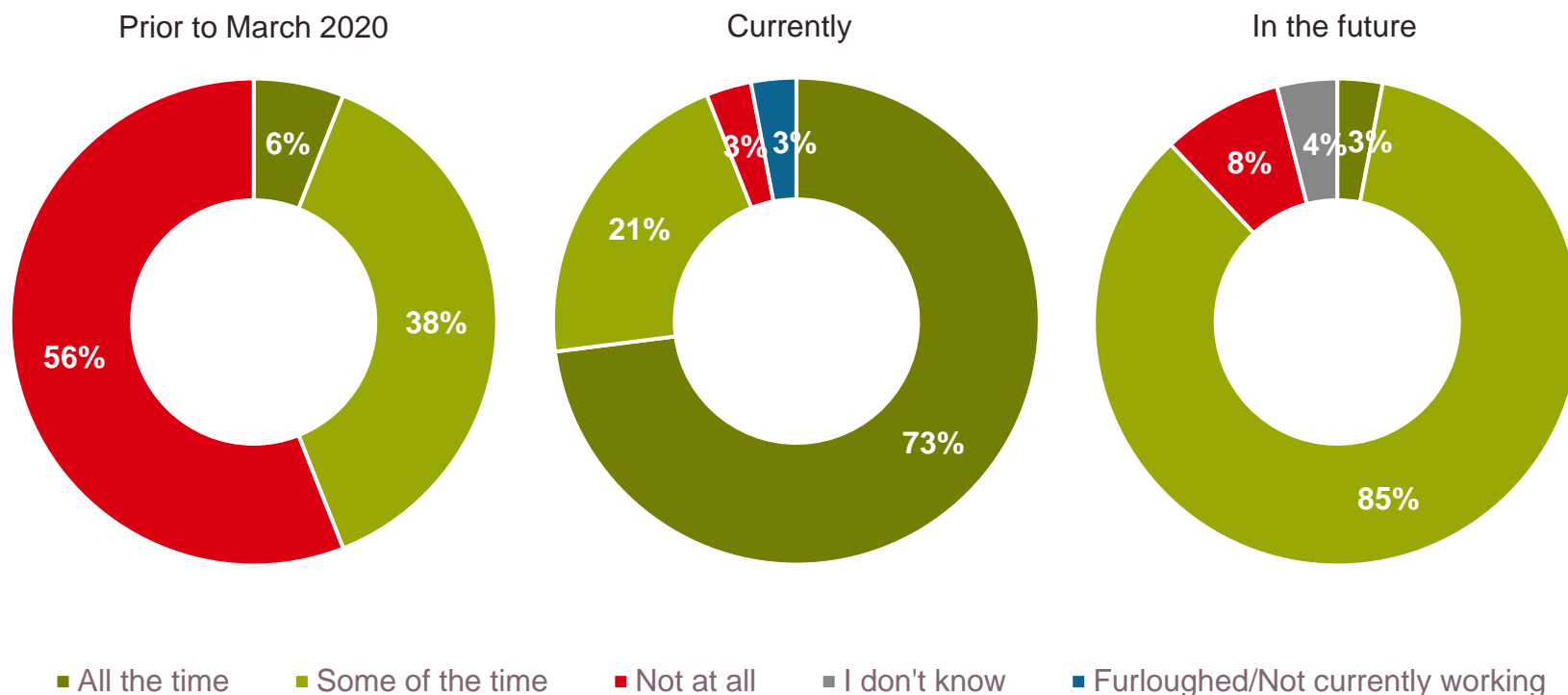


Base: Those for whom rail was their main mode of commuting pre March 2020 (1,294)

All previous users of train who do not physically need to attend their workplace all the time (n – 1,110)	Will not commute in the future or don't know	Will commute but not by rail or don't know	Will commute by rail
	13% (n – 143)	8% (n – 92)	79% (n – 875)

88 per cent of rail commuters, who do not need to physically attend their place of work all the time say that they expect to work from home at least some of the time in the future. This compares with 44 per cent who worked from home some or all of the time prior to March 2020.

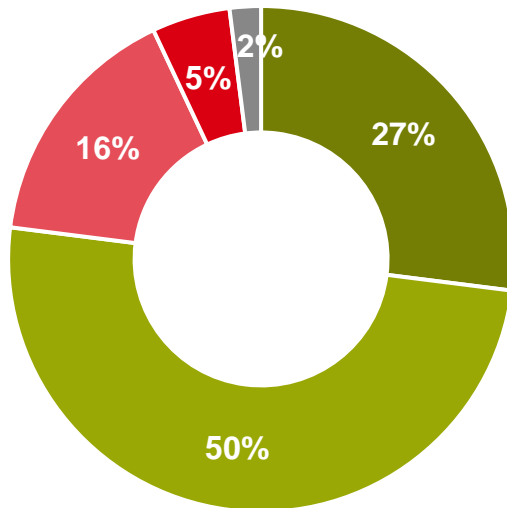
During your employment prior to March 2020 / At this time / In your employment in the future when Covid-19 no longer poses a risk, in a typical working week how often do you expect to work from home?



Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (875)

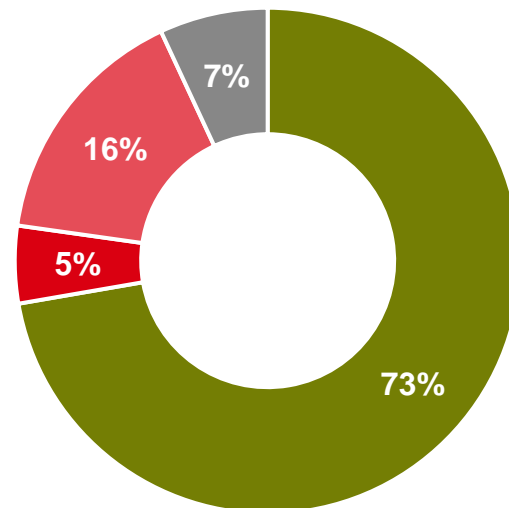
77 per cent indicate that at least to some extent they will have a say in any decision regarding how frequently they need to attend their workplace in the future. 73 per cent of those who expect to work from home at least some of the time say their employer is supportive of staff working from home.

To what extent will you have a say in any decision regarding the extent to which you will need to attend your usual place of work in the future?



- Very much
- To some extent
- Not very much
- Not at all
- I don't know/Not applicable

Of those who said all or some of time, how would you describe your current employer's attitude to towards working from home in the future when Covid-19 no longer poses a risk?



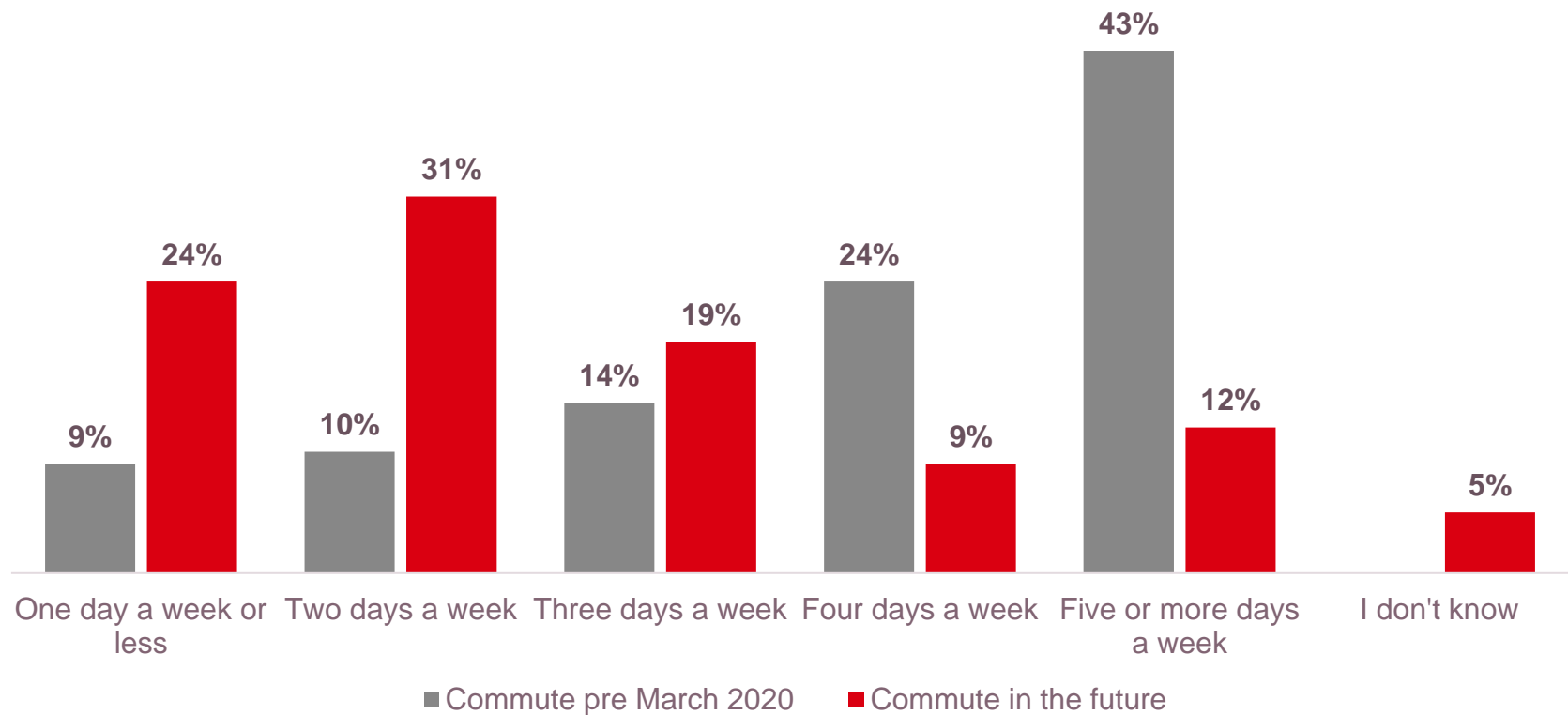
- Generally supportive
- Generally unsupportive
- I'm unaware
- Not applicable

Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (875).

Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, who will commute by rail in the future, and whom expect to work from home at least some of the time in the future (770).

12 per cent say that they expect to travel to or from work for five or more days a week in the future compared to 43 per cent before March 2020

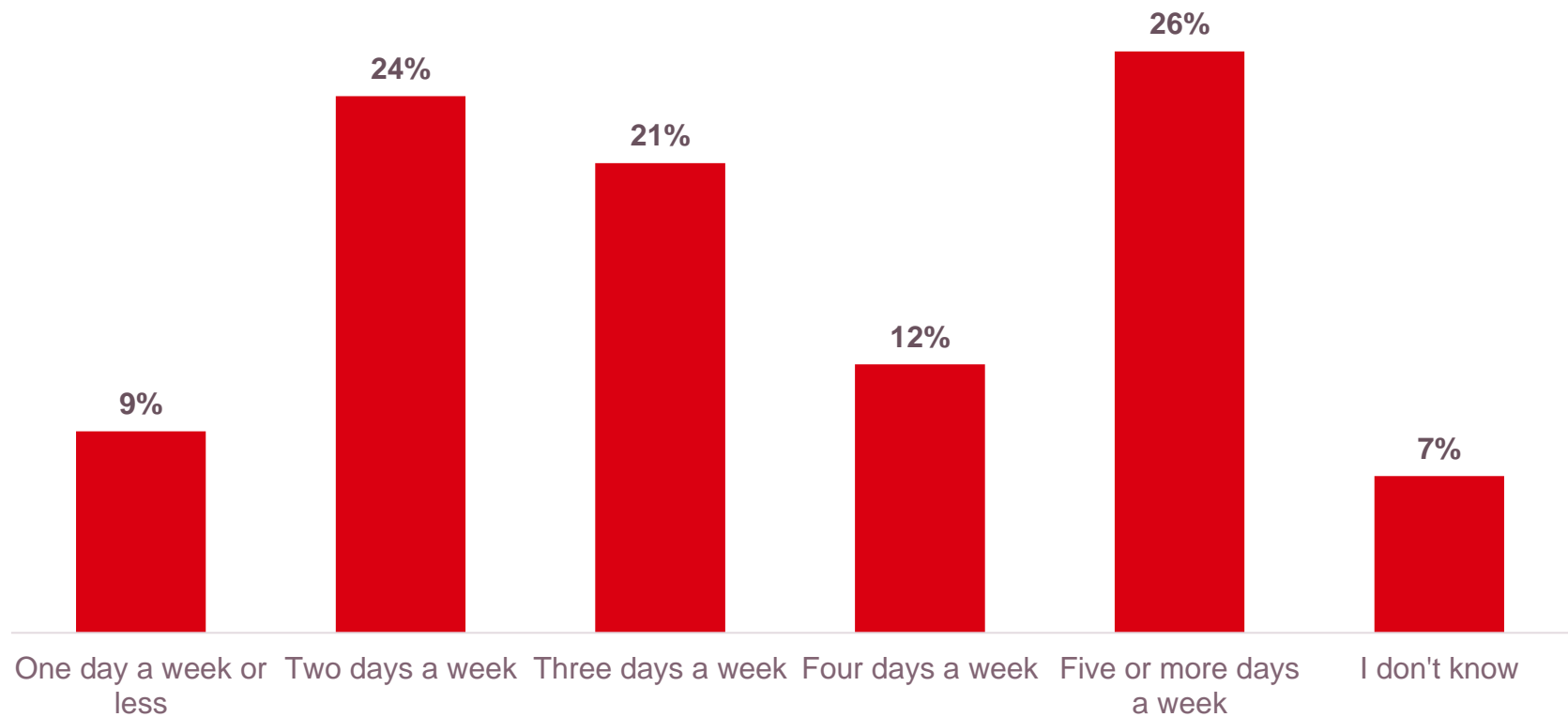
Approximately how many days, on average, did you commute to or from your usual workplace in a typical week prior to March 2020/do you think you will be commuting to or from your usual workplace when Covid-19 no longer poses a risk?



Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (875)

26 per cent of those who commuted by rail for five or more days a week prior to March 2020 and who do not need to physically attend their workplace all the time will commute by rail for five days a week in the future

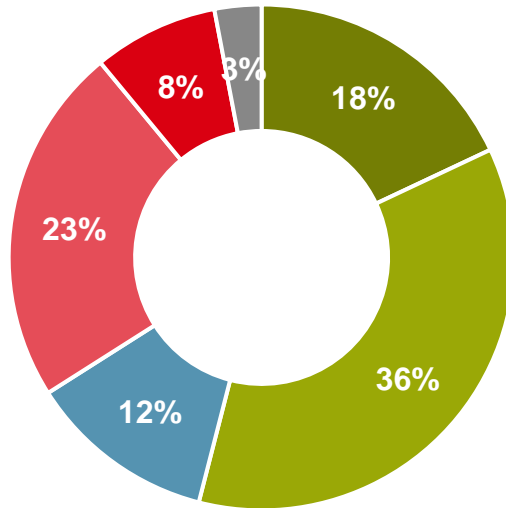
Approximately how many days, on average, do you think you will be commuting to or from your usual workplace when Covid-19 no longer poses a risk?



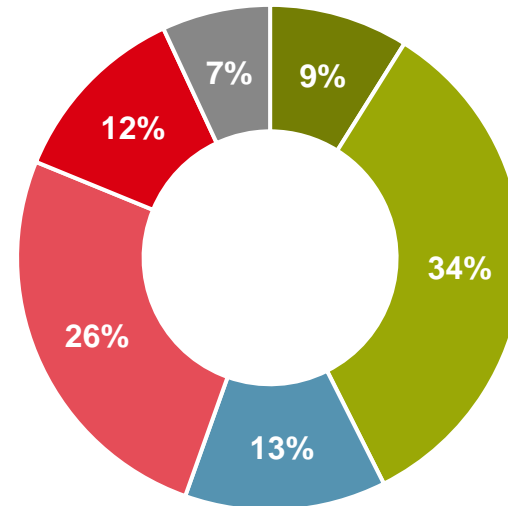
Base: Those who commuted by rail for five days a week prior to March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (380)

54 per cent of future rail commuters, who will travel to their place of work for fewer than five days in a typical week, agree that they expect to work mainly from home and only travel into their workplace when required. 43 per cent say that they expect to have a routine working pattern.

In the future I expect that I will work mainly from home and only travel into my usual workplace when required, e.g. to attend meetings?



In the future I expect to have a routine working pattern where I commute on the same days every week?



■ Strongly agree
■ Tend to disagree

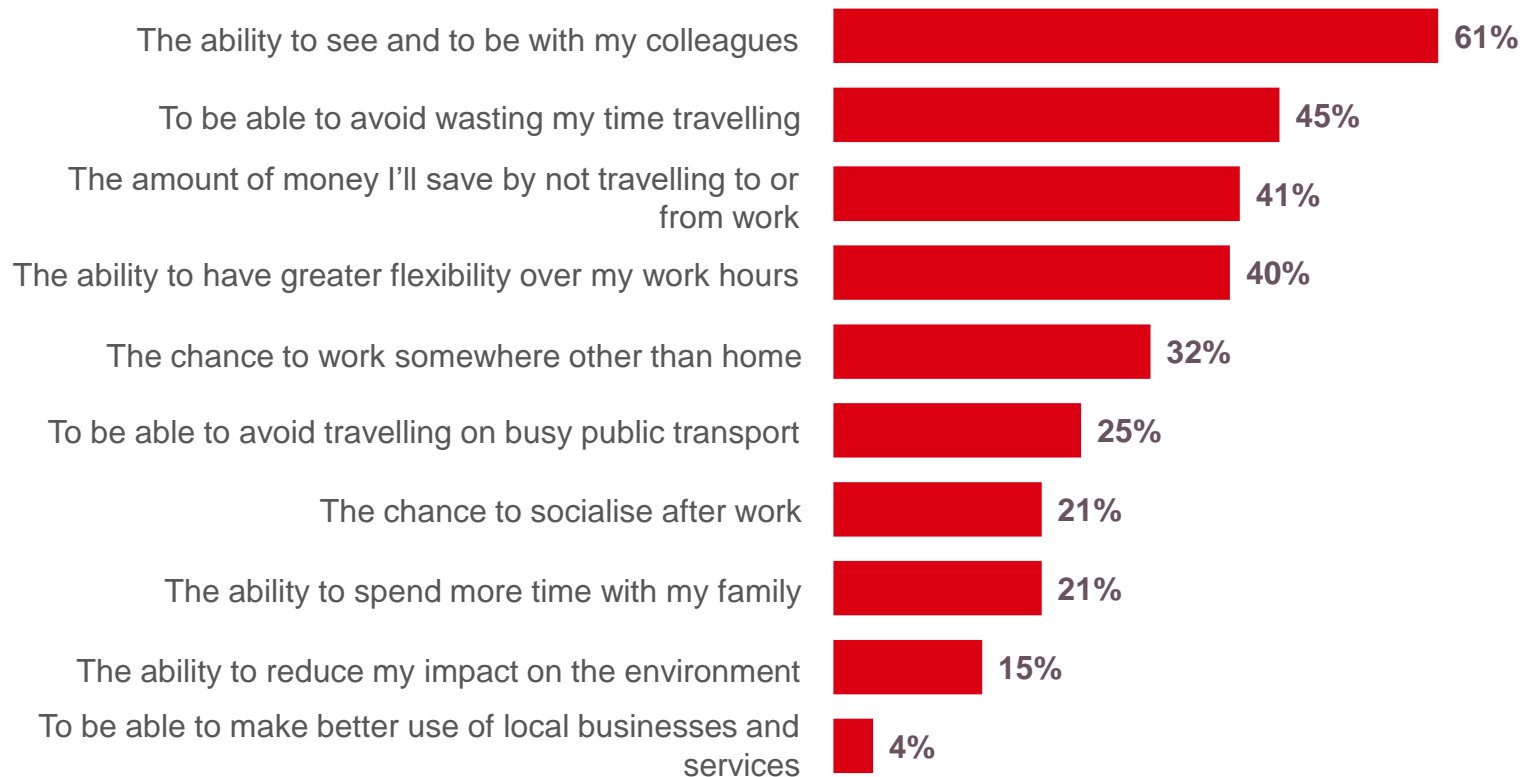
■ Tend to agree
■ Strongly disagree

■ Neither agree nor disagree
■ I don't know

Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail for fewer than five days a week in the future (772)

Among future rail commuters, who do not need to physically attend their place of work all the time, the ability to see and to be with colleagues is the biggest driver of a desire to return to the workplace

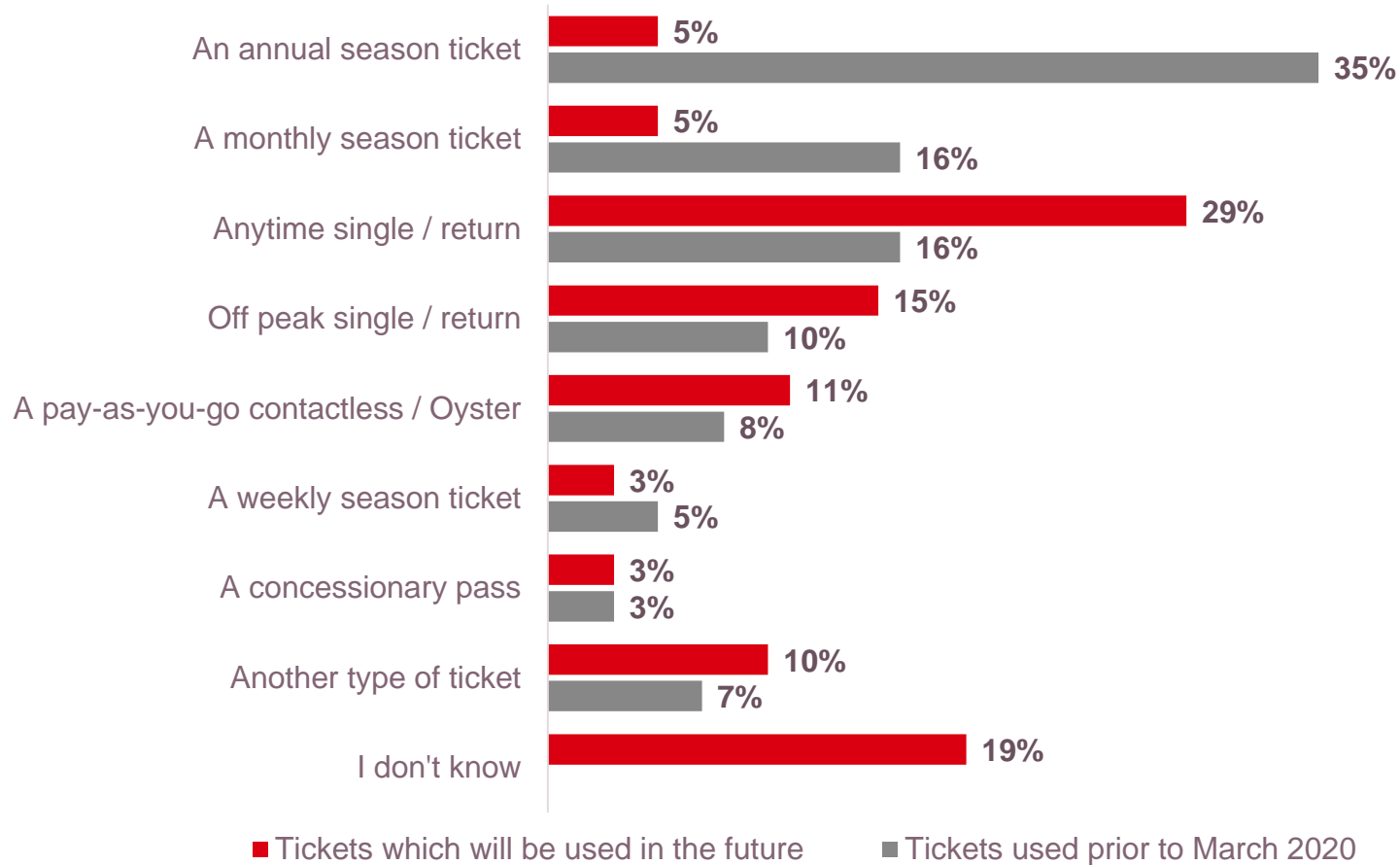
Which of the following are most likely to influence the extent to which you will make journeys to or from work, or decide to work from home in the future?



Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (875)

Ticketing

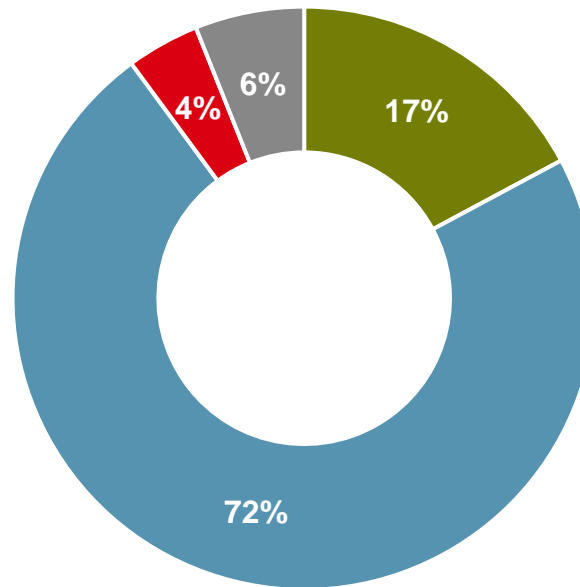
35 per cent who previously commuted by rail and who do not need to physically attend their workplace all the time used an annual season ticket to make this journey. Just 5 per cent expect to use this type of ticket in the future.



Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (875)

Just 17 per cent say that in the future they will make journeys to work at off-peak times more often than they did prior to March 2020

In the future, if or when you make journeys to or from work, to what extent do you expect that you will make these journeys at off-peak times (i.e. after 9.30am in the morning and before 4.30pm or after 6pm in the evening)?



- More often than I did prior to March 2020
- Less often than I did prior to March 2020

- About the same amount as I did prior to March 2020
- I don't know

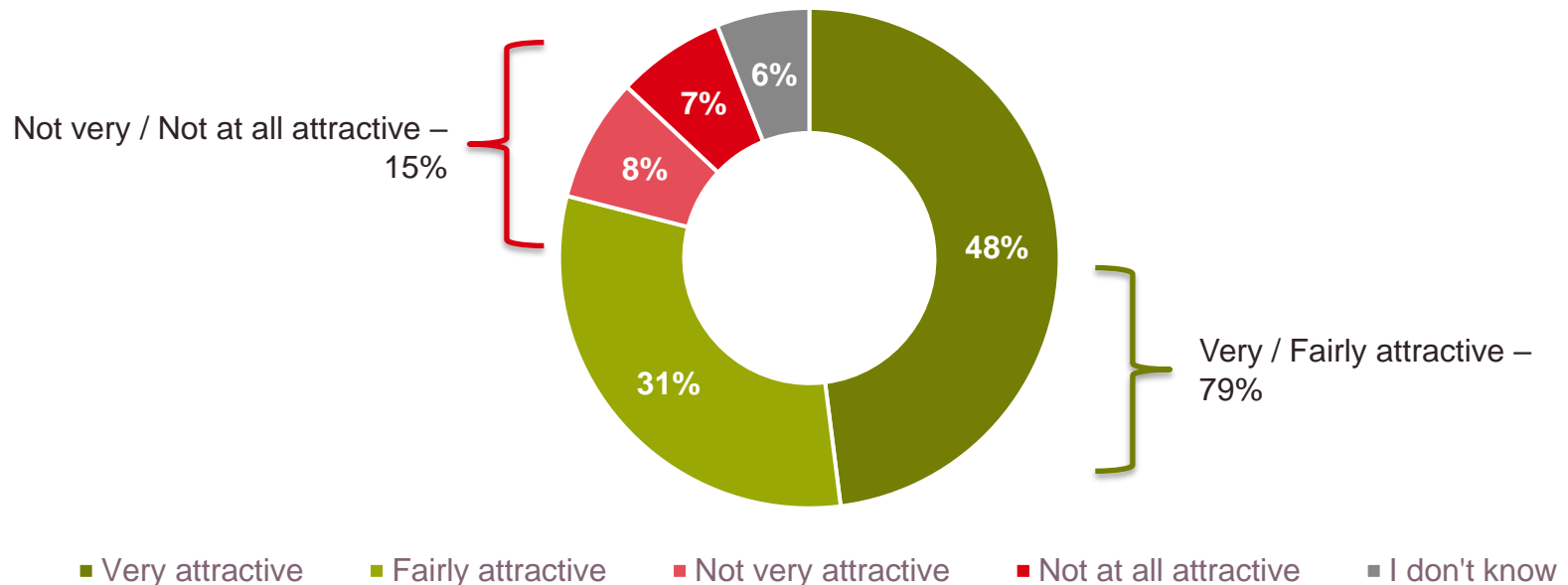
Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail for fewer than five days a week in the future (772)

79 per cent say that a flexible season ticket option would be attractive to them in the future

Some people have talked about 'flexi-season tickets'. As an example, this could mean:

- Buying a bundle of tickets for 5 days travel, which:
- must be used within a month; and
- offers a discount compared with buying 5 separate return tickets

How attractive an option would this be for you when buying tickets to travel to or from work in the future?

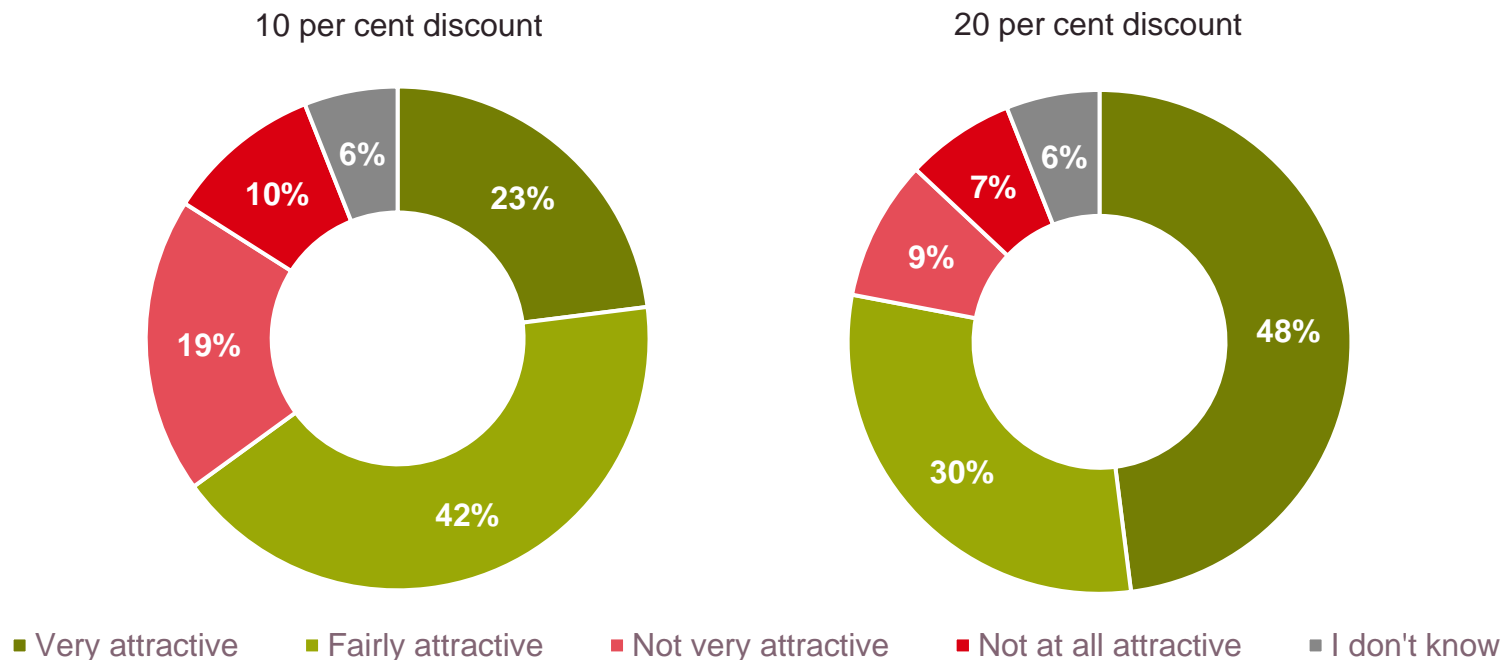


Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (875)

65 per cent find the idea of a flexible season attractive at a 10 per cent discount, while 78 per cent find it attractive at a 20 per cent discount

Now imagine that the cost of a flexi-season offered a 10 / 20 per cent discount on the price of buying five separate return journeys.

How attractive would this option be for you when buying tickets to travel to or from work in the future?

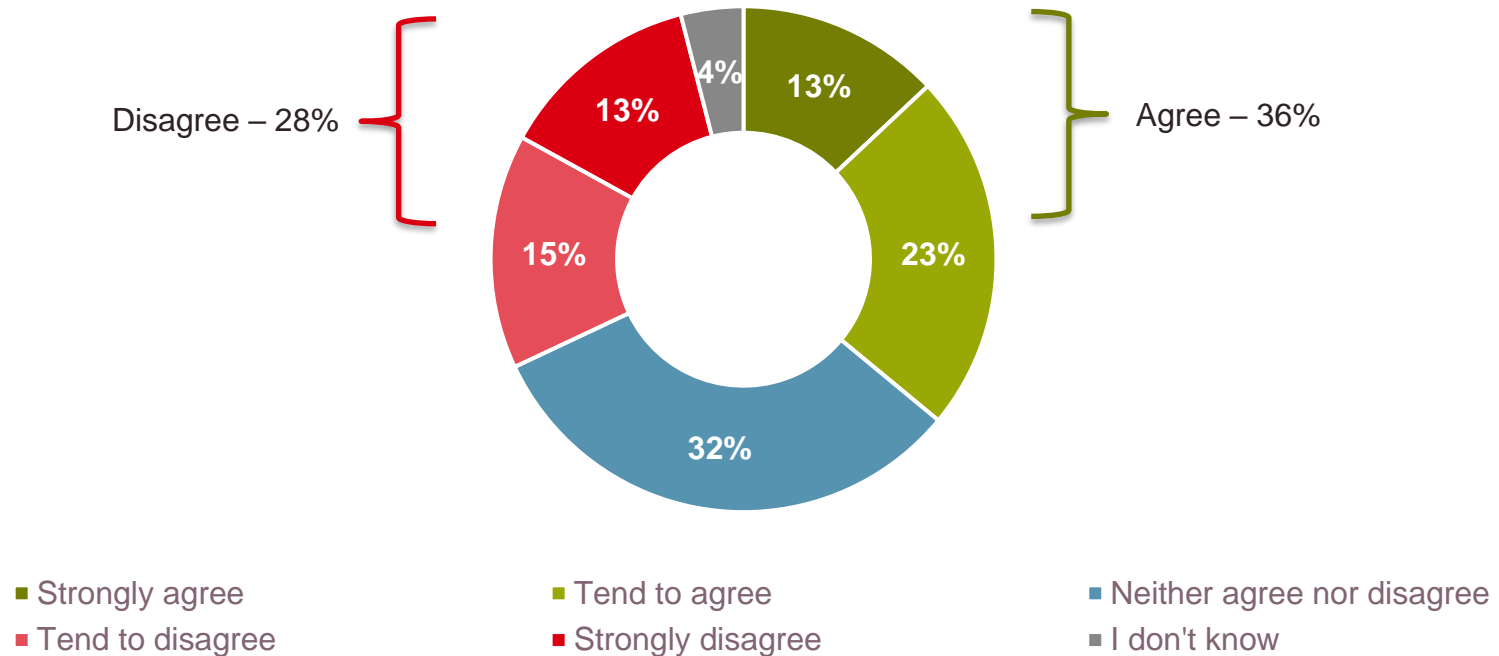


Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (875)

36 per cent agree that the availability of a flexible season ticket will make them more likely to travel to or from work in the future

To what extent do you agree or disagree that..?

The availability of a flexi-season ticket will make me more likely to travel to my usual workplace more often in the future

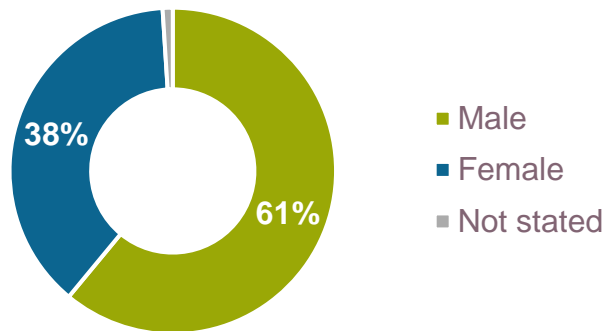


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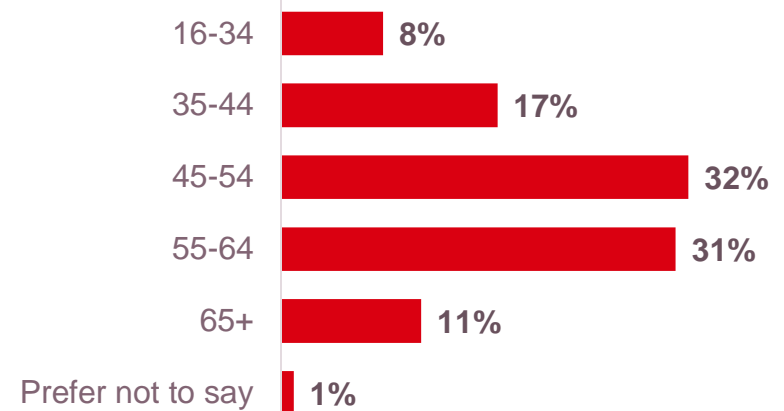
Sample profile

Sample profile – those commuting by rail previously who do not need to physically attend their workplace all the time and who will commute by rail in the future

Gender



Age



Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (875)