



Future rail commuting survey Autumn/Winter 2021

September 2021

Introduction

One of the key issues facing the rail industry is the extent to which the commuting market will recover from the coronavirus pandemic. Is working from home here to stay or will we see a drift back to 'office life'?

In November 2020 we completed research with our Transport User Panel which explored passengers' expectations and intentions for the future. The results can be seen on the Transport Focus website [here](#). In August 2021 we went back and asked again – we wanted to see if attitudes had changed as we finally emerged from restrictions.

We again focused on people who used to be regular commuters by rail and those whose work does not require them to physically attend their workplace all the time. What was their commuting pattern before Covid-19, to what extent are they commuting now and what would they expect their commuting pattern to be for the remainder of 2021?

As before, this was 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 may have a choice we get a sense of behavioural change. Now that they are emerging from restrictions will they go back to the old ways or continue to work from home?

This is important because changes to commuting patterns will have a significant effect on levels of demand, crowding, service frequencies and industry revenues.

This report sets out our latest findings.

Summary of key findings

- Travel intentions:
 - Just over two-thirds (68 per cent) of those who used to commute by rail (and who do not have to physically attend their place of work) say they will commute by rail in Autumn/Winter 2021. In November, when we asked about 'when Covid-19 no longer poses a risk' it was higher, at 79 per cent.
 - Greater proportions of rail commuters who do not physically have to attend their place of work are saying that they will not commute at all, or that they don't know about their future commuting patterns (20 per cent compared with 13 per cent previously).
- Working from home is still seen as a genuine option for many people:
 - Prior to March 2020, 56 per cent of those who used to commute by rail (and who do not have to physically attend their place of work) said that they worked from home all or some of the time. Perhaps not surprisingly this increased 'during Covid-19' with 97 per cent currently working from home (with 52 per cent doing so all the time and 45 per cent some of the time).
 - In future 94 per cent say they will continue to work from home – but with the balance shifting almost entirely to 'some of the time' (91 per cent). There is a clear sense that hybrid-working is here to stay.
 - Employers remain generally supportive of working from home. Nearly eight out of ten rail commuters who do not physically have to attend their place of work say their employer is supportive of staff working from home. Only five per cent say their employer is unsupportive. These are very similar to the results from November.

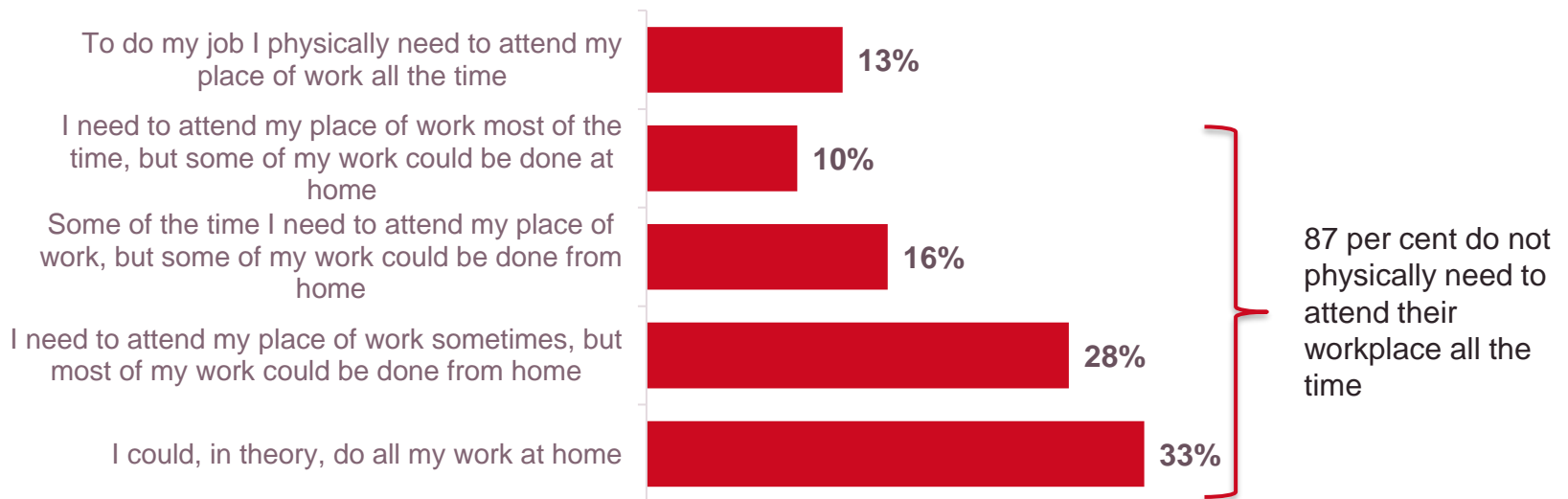
Summary of key findings

- Commuting patterns and frequency remain significantly different to before Covid-19:
 - There remains a significant drop in those who say they will commute five days a week – from 42 per cent pre Covid-19 to just 6 per cent for the rest of 2021. This is lower than in our November 2020 survey, when 43 per cent said that they commuted 5 days a week before Covid-19 and 12 per cent said that they would 'when Covid no longer posed a risk'.
 - 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 8 per cent pre Covid-19 to 31 per cent in future; those commuting two days has increased from 10 per cent to 33 percent, and for three days from 15 per cent to 21 per cent. These are all slightly higher than the results for November 2020.
 - 57 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. 44 per cent say that they expect to have a routine commuting pattern.
 - Taken together this gives a clear sense that, for those who can work from home, the traditional 4-5-days a week commute is unlikely to return. A hybrid, 1-3 days a week commuting pattern is emerging.

Background and sample definition

- The findings in this report update those from a similar survey sent to Transport User Panellists in November 2020. One important difference to note when making comparisons is that in the recent survey, when asking about future commuting behaviour we specified the period 'from September and for the rest of 2021'. In our previous survey we did not specify dates, but asked about 'when Covid-19 no longer poses a risk'.
- This survey was sent to the 'Transport User Panel' on 18 August 2021. The survey closed on 31 August with 3,775 panellists having submitted a response.
- The starting point for this report are the 1,310 respondents who used rail as their main mode of transport to or from work before March 2020. Of these respondents, 772 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 are the focus of this report.
- 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.
- 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 sub-set of commuters rather than statistically representative of them.

87 per cent of those who previously commuted by rail do not physically need to attend their workplace all the time. 68 per cent of these commuters say that they will use rail to make these journeys for the remainder of 2021



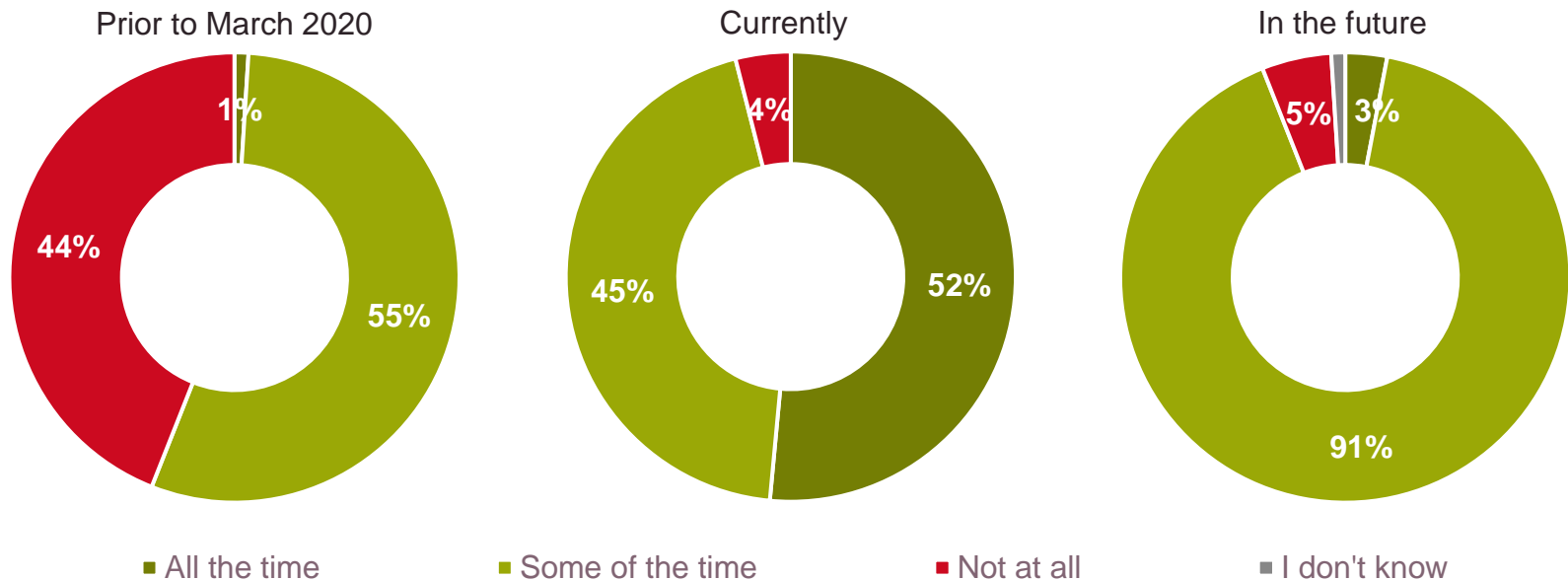
Base: Those who are currently working, for whom rail was their main mode of commuting pre March 2020 (1,310)

All previous users of train who do not physically need to attend their workplace all the time (n – 1,133)	Will not commute in the future or don't know	Will commute but not by rail or don't know mode	Will commute by rail Autumn/Winter 2021
	14% will not commute, 6% don't know (n – 226)	12% (n – 135)	68% (n – 772)
Results in November 2020	6% will not commute, 7% don't know	8%	79%

Previously 13 per cent of those who commuted by rail that didn't need to attend their workplace all the time said that they would not commute in the future, or that they didn't know if they would be commuting. This compares with 20 per cent who say similar regarding their potential commuting for the rest of 2021. Results suggest that previous rail commuters are increasingly likely to think that they will be working from home.

94 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 56 per cent who worked from home at least some of the time prior to March 2020

During your employment prior to March 2020 / At this time / From September and for the rest of 2021, assuming that there are no Coronavirus restrictions requiring you to work from home, in a typical working week how often do you expect to work from home?

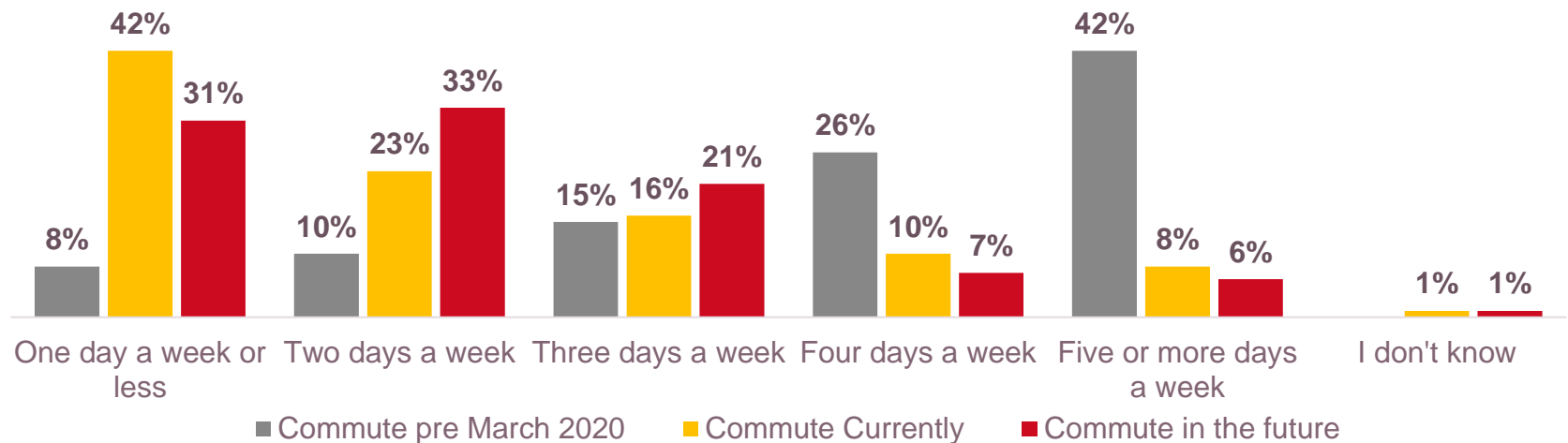


Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (772)

Compared with the findings from November's research, rail commuters who do not physically need to attend their place of work are marginally more likely to work from home some or all of the time in the future than they were previously; 88 per cent said this previously compared with 94 per cent on this occasion. In terms of current behaviour 52 percent say that currently they are working at home all the time. 73 per cent said similar in the previous research indicating a gradual return to office working.

6 per cent say that they expect to travel to or from work for five or more days a week in the future compared to 42 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 / are you currently commuting / do you think you will be commuting to or from your usual workplace in a typical week from September until the rest of 2021?



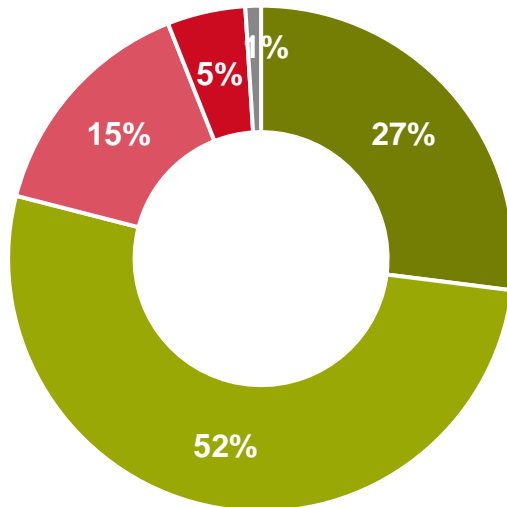
Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in the future (772) / those who are currently travelling to a specific workplace some or all of the time (378)

'Future commuting' results in November 2020	One day a week or less	Two days a week	Three days a week	Four days a week	Five days a week
	24%	31%	19%	9%	12%

Compared with the findings from November's research, increased proportions say that they expect to commute for one day a week or less, while smaller proportions say that they expect to travel to work for five or more days a week in the future.

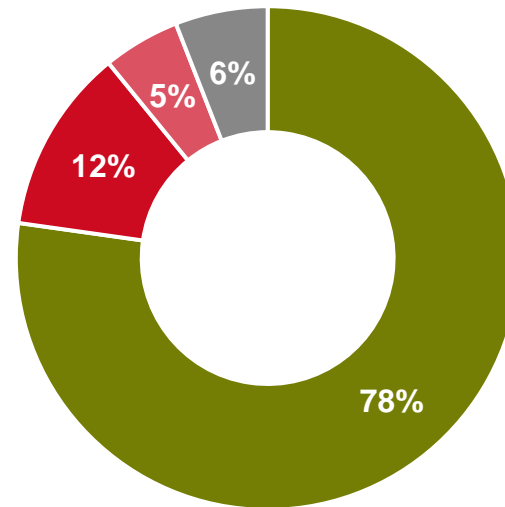
79 per cent of rail commuters, who do not need to physically attend their place of work all the time, indicate that at least to some extent they will have a say in any decision regarding how frequently they need to attend their workplace in the future. 78 per cent say their employer is supportive of 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

How would you describe your current employer's attitude to towards working from home in the future?



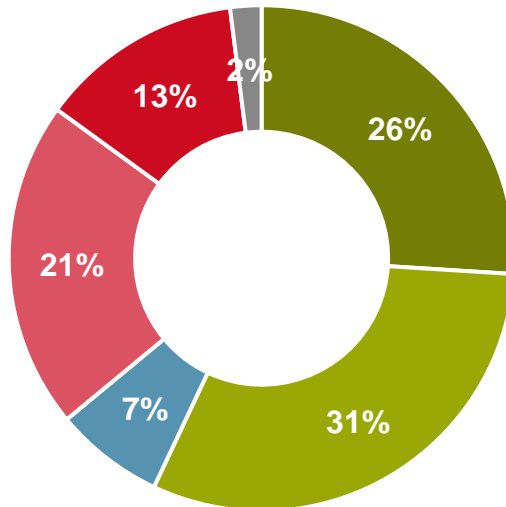
- generally supportive
- generally unsupportive
- I'm unaware
- Not applicable

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 (772)

Compared with November's research there has been very little change in the proportion who say that they will have at least some say in any decision regarding the extent to which they will need to attend their place of work in the future. Similarly, there has been little change in the proportion who say that their employer is supportive of home working.

57 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. 44 per cent say that they expect to have a routine commuting pattern

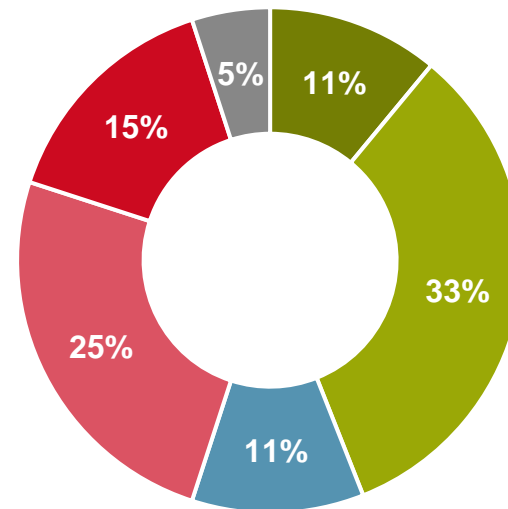
From September and for the rest of 2021 I expect that I will work mainly from home and only travel into my usual workplace when required, e.g. to attend meetings?



■ Strongly agree
■ Tend to disagree

■ Tend to agree
■ Strongly disagree

From September and for the rest of 2021 I expect to have a routine working pattern where I commute on the same days every week?



■ Neither agree nor disagree
■ I don't know

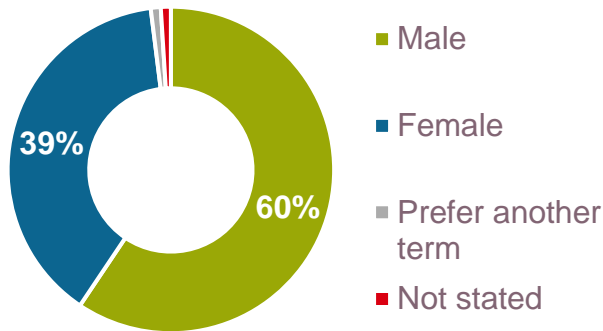
Base: Those for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail for fewer than five days a week in the future (722)

Compared with November's research there has been very little change in the proportion of those who do not expect to commute for five days a week who say that they expect only to travel to work when required. Similarly, there has been little change in the proportion who say that they expect to have a routine travel pattern each week.

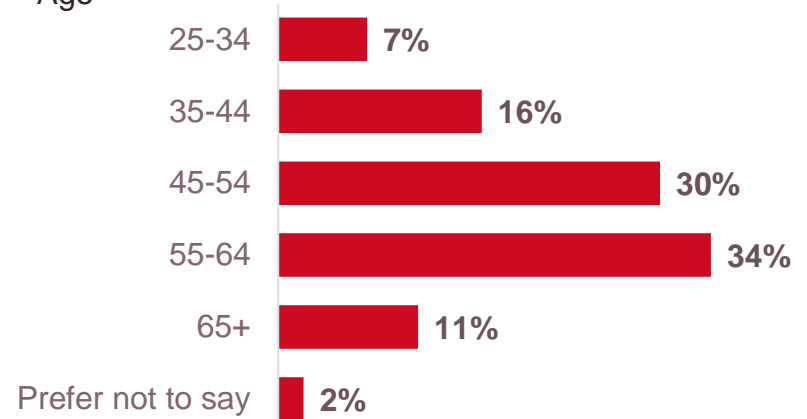
Sample profile

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 (772)