



Department  
for Transport

# Part-time commuters and new flexible fares research

## Slide deck report

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The image shows the interior of a modern train carriage. The perspective is from the aisle, looking down the length of the train. On the left, there are rows of white seats with blue handrails. On the right, there are more white seats, also with blue handrails. The floor is a light-colored, polished material. The ceiling has recessed lighting fixtures. In the distance, a blue illuminated sign is visible above the aisle. The overall lighting is bright and clean. The text "Executive summary" is overlaid in white on the lower left portion of the image.

# Executive summary

# Executive summary



Ipsos MORI conducted a research study on behalf of the Department for Transport (DfT) to help understand who existing and potential rail commuters are, their travel patterns and anticipated travel patterns, as well their appetite for a new flexible rail ticketing product.

The research was conducted online through the Ipsos MORI Online Panel with a nationally representative sample of 8,449 adults, and a boost of 1,551. In total, 10,000 members of the panel aged 16-75 in England took part between 2-14 April 2021. This included a nationally-representative sample of 7,401 adults in work or education, 5,885 pre-pandemic commuters (all modes) and 2,319 future rail commuters. These groups of particular interest, including pre-pandemic commuters and future rail commuters, were asked more questions as part of longer 'routes' through the survey.

Please note that this research was undertaken before publication of the [Williams-Shapps Plan for Rail](#), so survey participants were not aware of announcements in the White Paper relating to rail ticketing when completing the survey.

**Most workers travelling by any mode used to commute every day before the pandemic, and most of those who did so were committed to doing so regularly. In this respect, commuting patterns were notable for their consistency.**

- **More than four in five workers commuted regularly to a place or places of work** by any mode before the pandemic (83%), three quarters of whom did so four or five days per week (75%), though this was lower for rail commuters (71%). Most commuted during peak hours, with many never commuting off-peak. Typically, two thirds or more commuted to work during peak hours, and three in five or more commuted from work during peak hours. These figures were marginally higher among rail commuters, who were slightly more likely to travel to and from work at peak times.
- **Some flexible working was possible for most pre-COVID commuters**, but not for around one in three (33%). Most of those who were able to do work flexibly before the lockdown did take advantage of this (55% took up at least one flexible working pattern). Flexible working was possible for all but around one quarter of rail commuters, most of whom took advantage of this flexibility (61%).
- There was some variation among demographic groups, such as age, working status, and household income, with regards to what flexibility was available to them before the lockdown. **Greater London residents and those with children in the household were more likely to have more flexible working patterns available to them**, especially with regard to the ability to work from home some or all of the time.
- One in five pre-COVID commuters used rail before the pandemic (21%). Most were full-time employed, from middle age groups, in higher income households, living in London or the South East.

# Executive summary



## However, COVID-19 had a dramatic impact on commuting patterns

- Since the beginning of the pandemic, **a third of pre-COVID commuters worked exclusively at home** (32%). The proportion commuting to a place of work dropped by almost 30 percentage points to just over half of workers. Over half of pre-COVID rail commuters (55%) worked exclusively at home since the pandemic.
- The pandemic **also changed the frequency of commuting patterns**, with three in five commuting 4-5 days per week (61%) compared with three in four before the lockdown (75%). Just under four in ten pre-COVID rail commuters travelled 1-3 days per week since the lockdown started (39%), compared with a quarter of pre-COVID rail commuters before the pandemic (25%).
- Most commuters continued to commute during peak hours, but **COVID commuters were more likely to travel during off-peak hours than pre-COVID commuters**.
- Public transport use for commuting purposes, and rail use in particular, dropped slightly during the pandemic among commuters who *continued* to commute during the pandemic .
- **There is little evidence of mode shift during lockdown**; most pre-COVID commuters who continued to commute since the pandemic used the same mode of transport they had used before.

## Commuting patterns are set to shift in both the near and longer-term, with implications for demand for travel in general, and rail in particular

- **The vast majority of workers commuting by any mode expect to commute again when restrictions are lifted** (82% in 2021 and 84% in 2022), with part-time workers more likely than full-time workers to commute regularly in 2022. The vast majority of rail commuters also expect to commute again. However, there is very little difference in anticipated commuting patterns in the rest of 2021 and 2022, suggesting **commuters expect to settle quickly into their post-COVID commuting patterns**.
- **Most of those expecting to return to commuting this year do not think they will commute as often as they did before the pandemic**.
- There is some evidence of greater anticipated flexibility offered by employers around travel times, with some more expecting to take advantage of this flexibility compared with pre-pandemic. In particular, future commuters say they would be very or fairly likely to commute to/from work during off-peak hours (53%).
- There is some early evidence that **rail**, and other modes of public transport, **could be more attractive for part-time commuting**, though car remains the dominant mode of choice, and it remains to be seen whether those anticipating rail use for commuting purposes – particularly those who did not commute by rail before COVID-19 – will do so often, if at all.

# Executive summary



## As a consequence, rail ticketing expectations are shifting too

- The proportion of rail commuters using season tickets has dropped substantially since lockdown, and survey findings suggest **monthly and annual season tickets are very unlikely to recover this year or beyond**.
- Instead, rail commuters appear to be looking more at **pay as you go** (19% for both 2021 and 2022, after the pandemic), **off-peak** (13% for both 2021 and 2022) and **day travelcard tickets** (10% for 2021 and 9% for 2022) for their commute.
- Around one in five **part-time commuters intend to use anytime** (21% in 2021, 24% in 2022), **pay as you go** (21% in 2021, 20% in 2022) or **off-peak tickets** (14% in 2021 and 2022) **for their commute next year**, and only a handful expect to use season tickets.
- The survey findings support the idea that more flexible ticketing options would be well received in future.
- About half of past rail commuters (before or since the pandemic) are **certain to or likely to use a smartcard in 2022** (49%), after the pandemic, and just under four in ten a barcode (37%). Around a third of those who buy their tickets online, normally receive them as a barcode (34%) or a smartcard (30%).

## A new flexible ticket proposition appeals to many, but not all, and for different reasons

- **Close to two in five commuters say they would be interested in a flexible fares proposition** (37% in 2021 and 39% in 2022, after the pandemic).
- Previous rail users who do not intend to use rail in future are more likely to be interested in the proposition than average (58% vs. 37% overall), as well as those who intend to use rail as their main mode in future (75%). Those intending to commute between one and three days a week are also more interested than average (46% vs. 37% overall).
- Reflecting changing rail ticketing expectations, the expectation that a new ticket would be **cheaper** and **not restrict people to travelling at certain times** are the most commonly-mentioned factors driving interest in the proposition.

# Background and objectives

## Overall project aims

- To understand who existing and potential **part-time commuters** are;
  - To explore their **needs** and requirements
  - To identify any **barriers** that prevent or discourage their use of rail for commuting purposes
  - To explore their appetite for a **new flexible part-time rail ticketing** product

The research explored the demographics, scale, needs and requirements of the potential customer base for flexible rail ticketing products, informing future rail fares policy development.



# Research methodology



- This research was conducted online through the Ipsos MORI Online Panel.
- A total of 10,000 members of the panel aged 16-75 in England took part between 2-14 April 2021. The fieldwork period was during Step 2 of the Government's Roadmap out of lockdown, after the stay at home rule had been lifted but with travel restrictions still in place. The Government's 'work from home' guidance remained in place at the time.
- This comprised a nationally-representative sample of 8,449 adults in England, and a booster sample of 1,551 future rail commuters.
- Quotas were set by age, gender and region, with final data also weighted to these profiles in order to generate a representative sample of the adult population of England.
- The rationale for this sampling approach was to generate a significant sample of working adults in a cost-effective and efficient way, while boosting among an audience which was more likely to consider a flexible ticket in future rather than relying on (lower) natural fallout. This meant more people answering questions about the proposition, in turn producing a stronger evidence base for decisions relating to future ticketing and the proposition.



# Key groups for the research

- The key groups sampled for this survey are listed below, including the nationally representative survey population of n=8,449 adults aged 16-75 in England.
- Groups of particular interest, including pre-pandemic commuters and future rail commuters, were asked more questions as part of longer 'routes' through the survey.

Survey  
population

Adult population in  
England aged 16-75  
+ booster sample of  
future rail users

n=10,000 (8,449 + 1,551)

'Medium'  
route

All adults in  
work or  
education

n=7,401

'Longer'  
route

All pre-  
pandemic  
commuters

n=5,585

'Longest'  
route

Future rail  
commuters

n=2,319

# Time reference points in the report

- Throughout the survey, participants were asked about previous and expected future behaviours over key timeframes of interest.
- These key time reference points are listed below, with the wording used in the questionnaire. Throughout the report, colour coding is used to help with visual interpretation of findings, with timescales also listed in chart legends and base definitions where applicable.

2020

Period immediately before the first UK-wide lockdown

2021

Period since the first UK-wide lockdown

2022

2021, after the lockdown restrictions have been fully lifted (between June-December)

2022, assuming no new lockdown restrictions are introduced

# Keys for icons and question groups

- A number of questions in the survey were filtered to be asked only of relevant participants.
- The icons below are shown at the top right hand side of each slide as a visual aid, and represent the audience asked each question as stated here.



Currently in work



Rail commuters (colour signifies if pre/during/post pandemic)



Interested in the new flexible fares



Students/pupils



Rail commuters who chose a rail ticket



Not interested in the new flexible fares



Commuters (colour signifies if pre/during/post pandemic)



Rail commuters who chose a rail ticket, excluding Anytime



Smartcard



Being allowed each flexible working pattern



Past rail commuters who buy their tickets online



Barcode

# This chapter answers the following research questions:

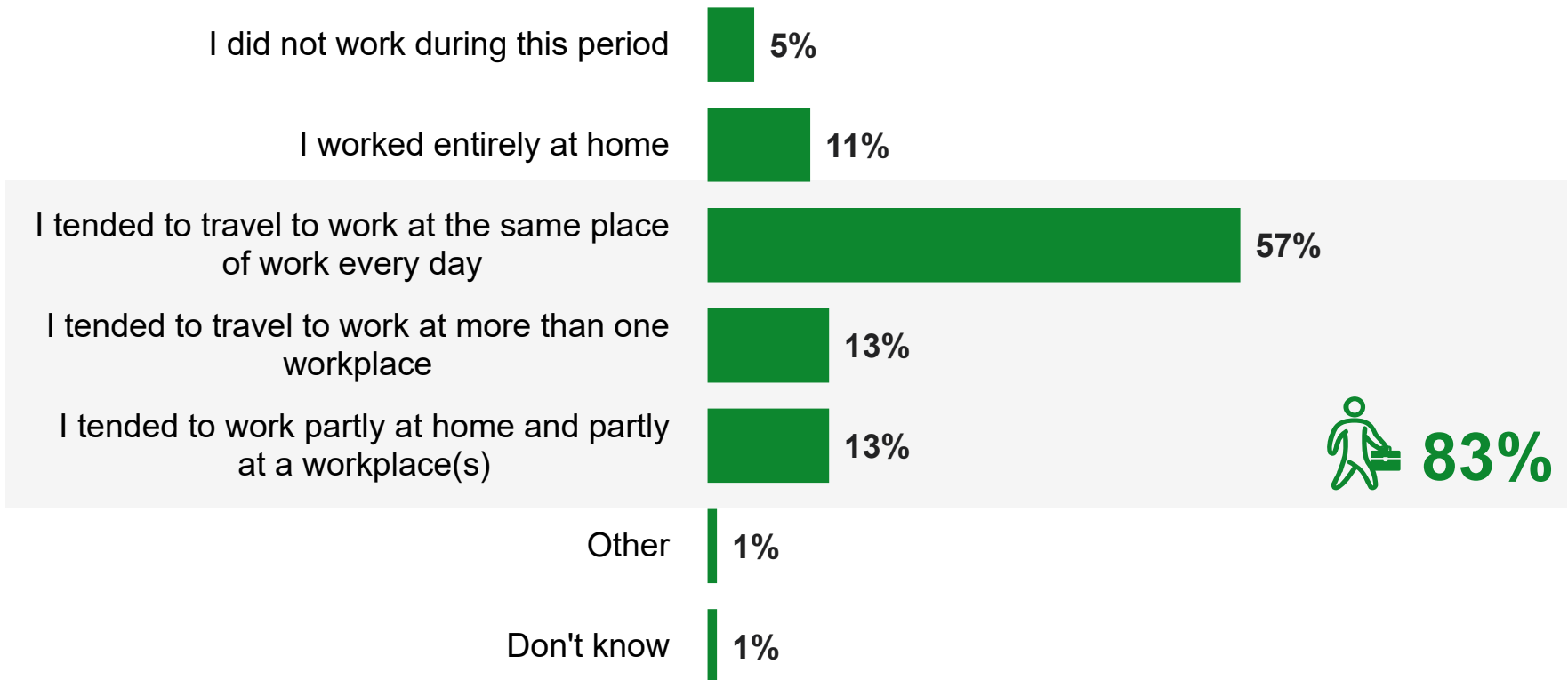
- What were the most common working and commuting patterns before the pandemic? What modes of transport did pre-COVID commuters use?
- Which demographic groups were more likely to commute part-time before the pandemic?
- How often did rail users commute and what were their working patterns before the pandemic?
- What tickets did rail commuters use to purchase before the pandemic?

# Working and commuting **before** the pandemic



# Most workers used to commute every day before the pandemic...

Q. Thinking back to the period immediately before the first UK-wide 'lockdown', that is the period between 1st January and the 23rd March 2020, which of the following applied to you personally?



# ...but this varies across different pre-COVID commuter groups, particularly household income, region and sector

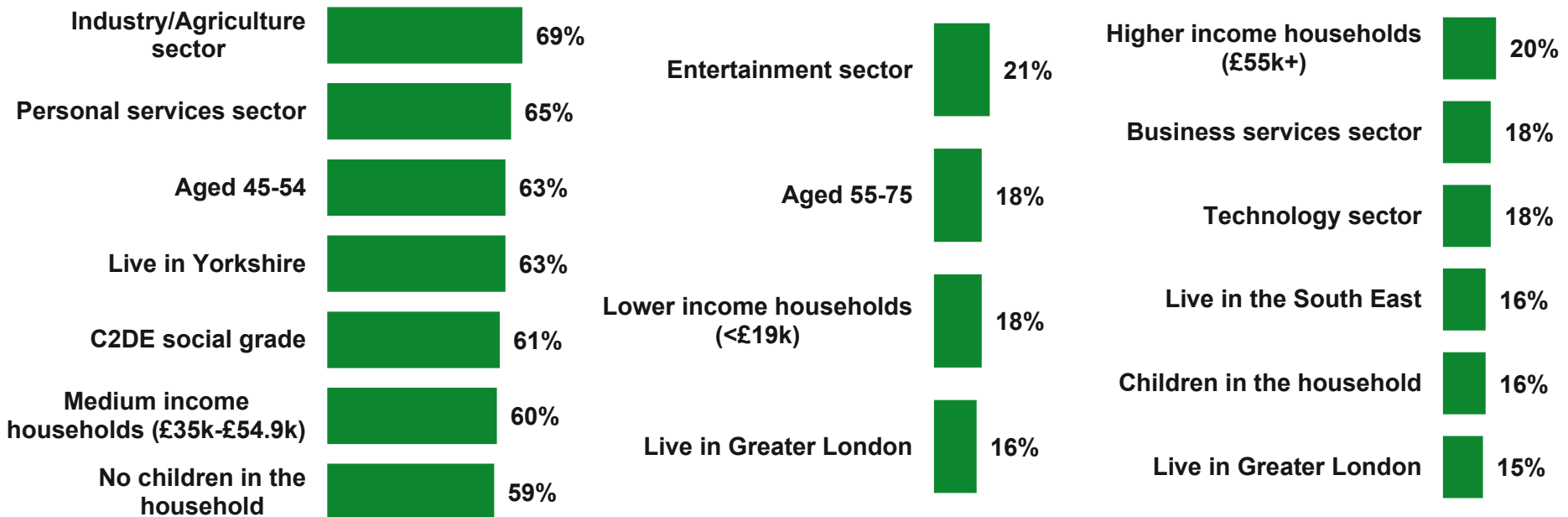


Groups who were more likely to:

**TRAVEL TO WORK AT THE SAME PLACE OF WORK EVERY DAY (AVERAGE 57%)**

**TRAVEL TO WORK AT MORE THAN ONE WORKPLACE (AVERAGE 9%)**

**WORK PARTLY AT HOME, PARTLY AT A WORKPLACE (AVERAGE 13%)**



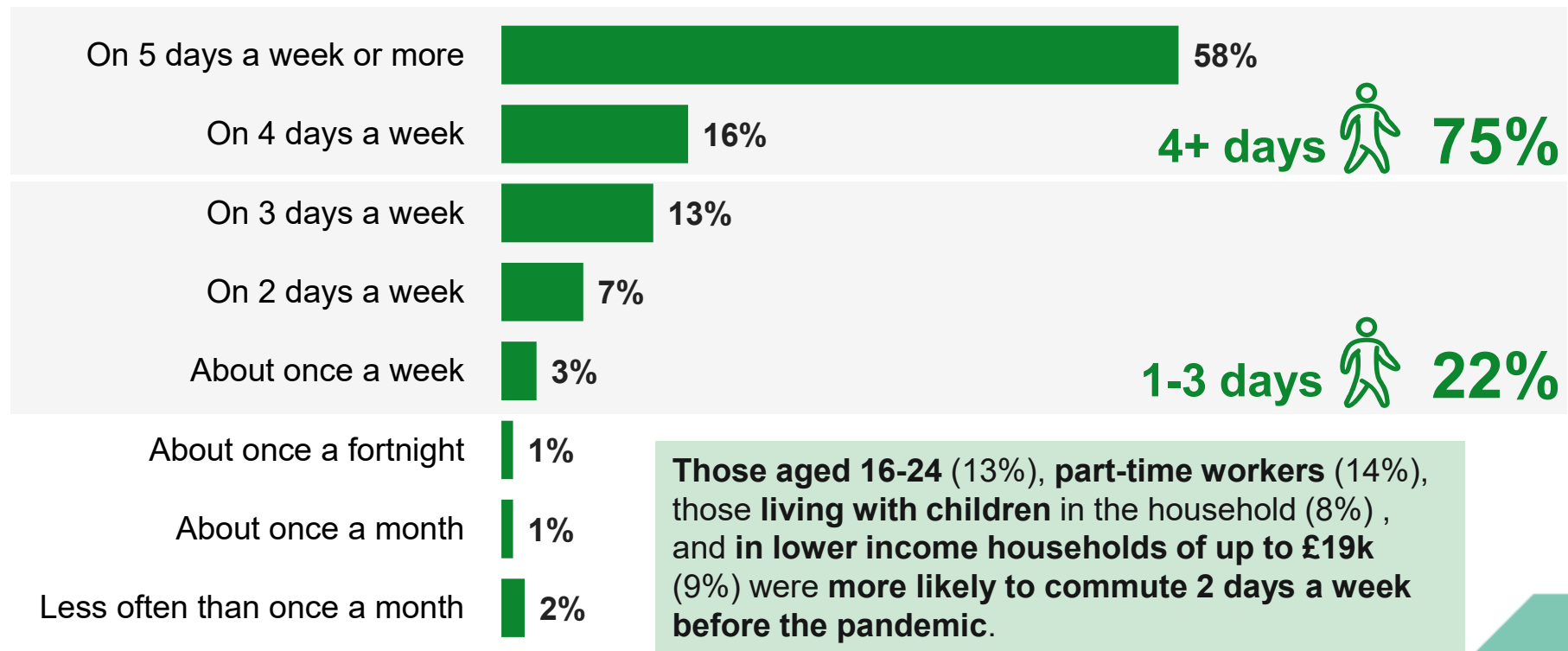
Source: Ipsos MORI/DfT

Base: All currently in work (6,825); who work in the Personal services (1,321), the Entertainment (204), the Business services (732) or Technology sector (395); aged 45-54 (1,428) or 55-75 (1,312); live in Yorkshire (621), Greater London (1,381) or the South East (1,172); C2DE social grade (1,139); with household income up to £19.9k (810), £35k-£54.9k (1,879) or £55k or more (1,994); with children in the household (2,587) or no children (4,238). 2-14 April 2021

# Most pre-pandemic commuters commuted regularly, while part-time workers and younger people were among those more likely to commute 2 days per week



Q. Still thinking back to the period immediately before the first UK-wide 'lockdown', on average, how often did you travel to or from a place of work, by any mode of transport?

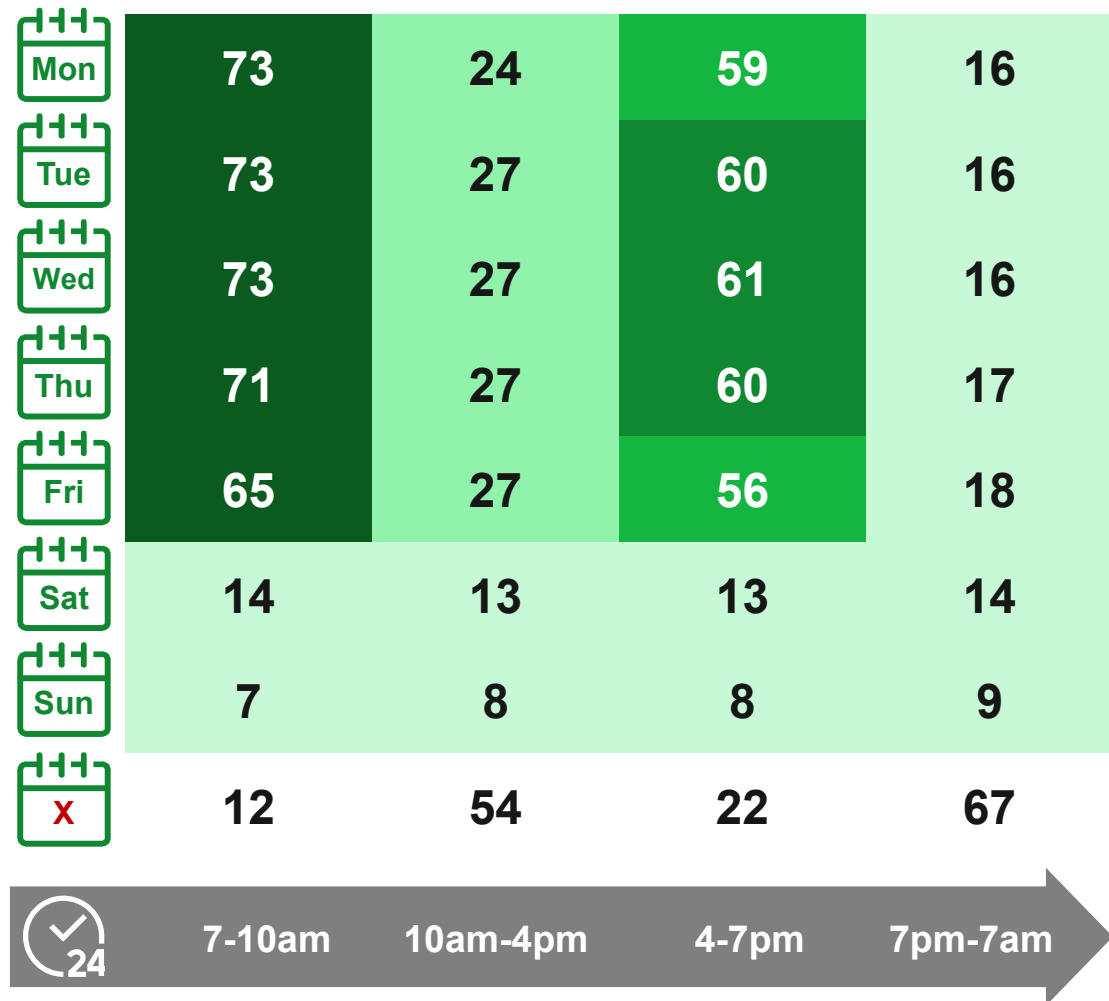




# Most pre-COVID commuters travelled during peak hours, many *never* commuting off-peak



Q. Still thinking back to the period immediately before the first UK-wide 'lockdown', in an average week, on which of the following days, if any, did you tend to commute to or from work between...? % [Multiple answers permitted]

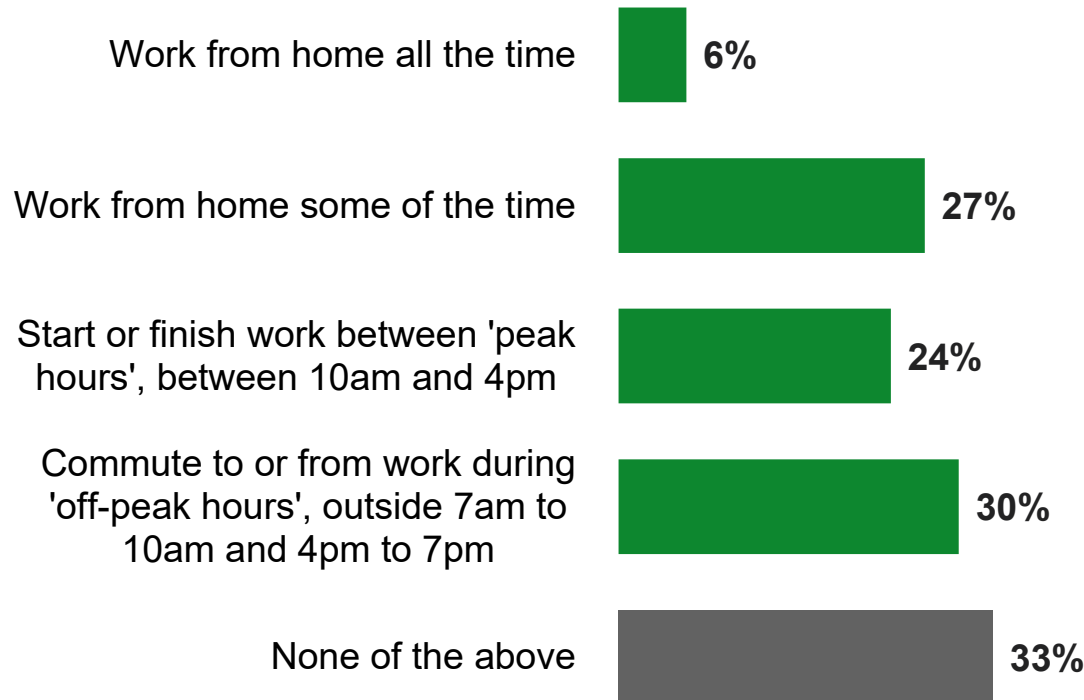




# Some flexible working was possible for most pre-COVID commuters, but not for one in three

Q. Still thinking back to the period immediately before the first UK-wide 'lockdown', were you able to do the following, if you chose to do so...?

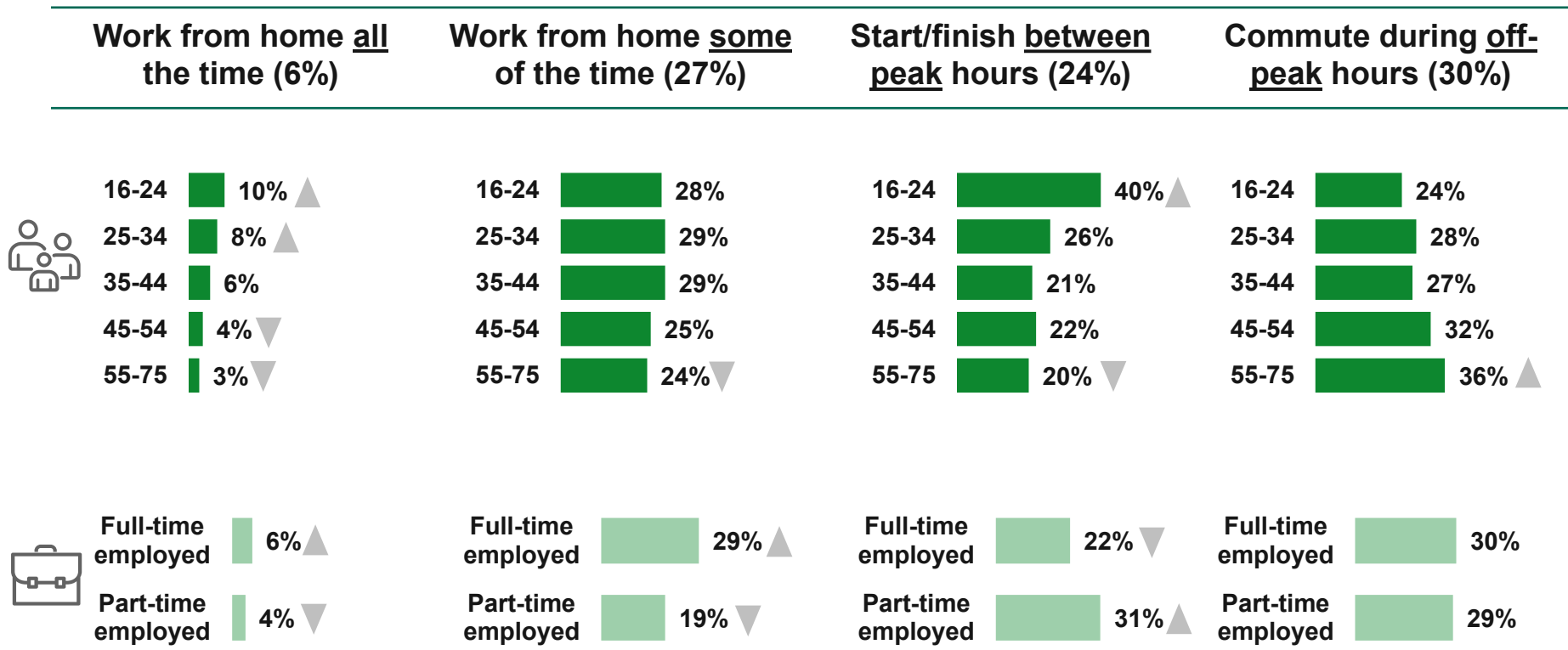
[Multiple answers permitted]



Those living in **Greater London** and those with children in the household were more likely to be able to **work from home** some (34% and 43% respectively) or all the time (9% and 8%) and **start/finish work between peak hours** (27% and 24%).

# While older commuters were less likely to be able to work from home, they were more likely to be able to commute off-peak

% selected groups



▲ ▼ Indicate significant differences compared with the average

# Higher income households had more flexibility for home working, but less flexibility around start/finish times

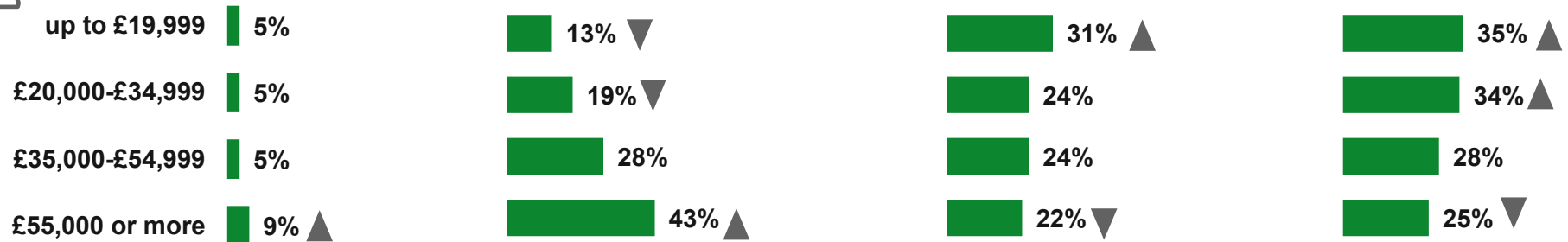
% household income

Work from home all  
the time (6%)

Work from home some  
of the time (27%)

Start/finish between  
peak hours (24%)

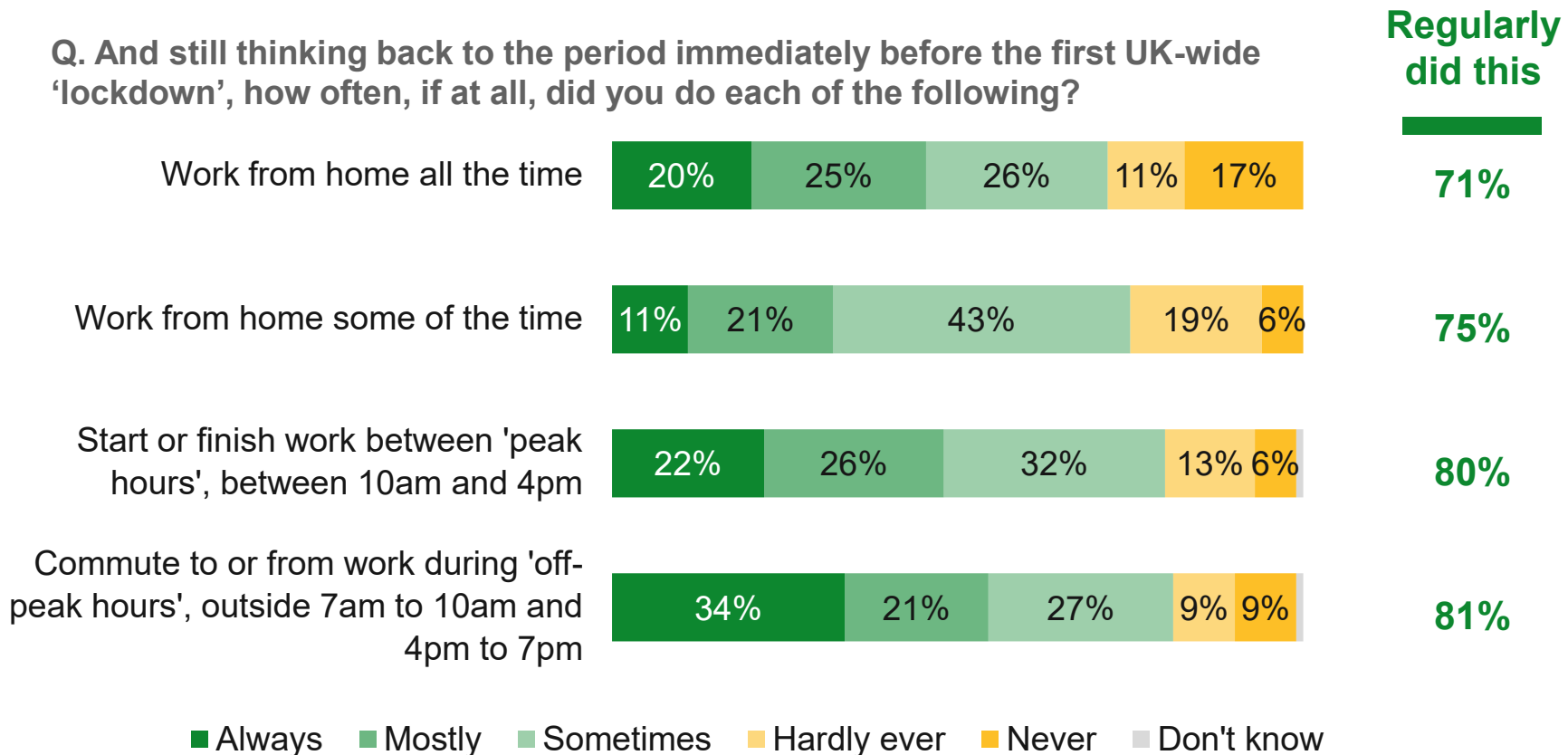
Commute during off-  
peak hours (30%)





# Most pre-COVID commuters able to do so took advantage of the flexibility – 55% took up at least one flexible working pattern

Q. And still thinking back to the period immediately before the first UK-wide 'lockdown', how often, if at all, did you do each of the following?

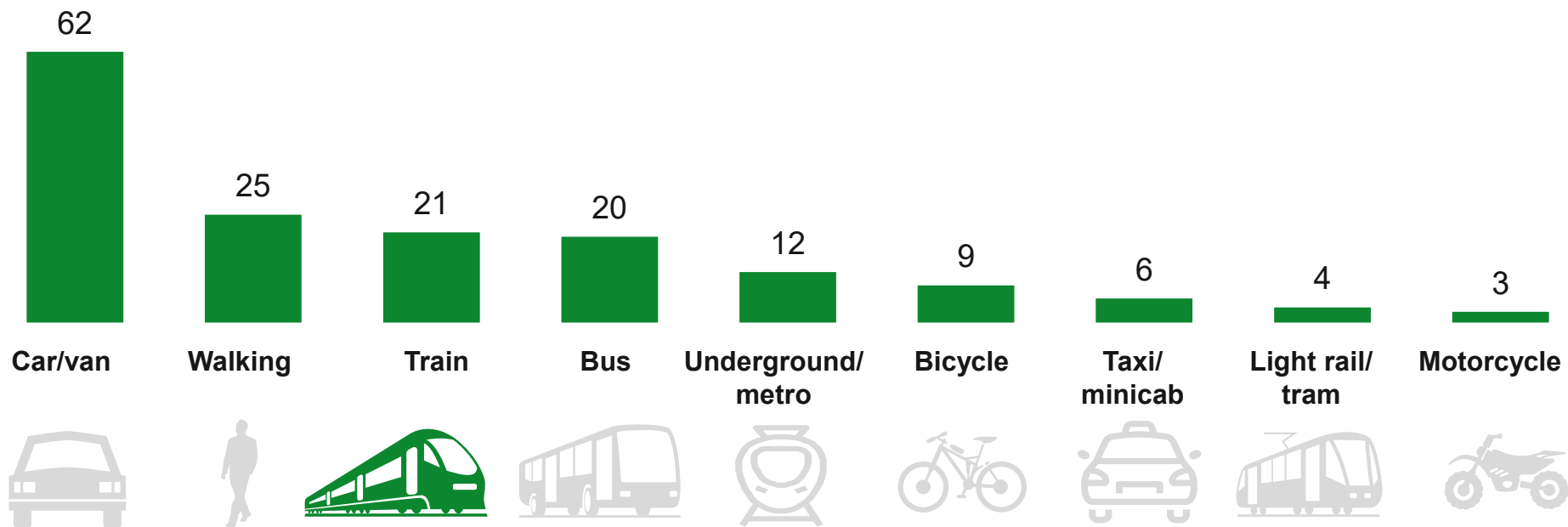


# Cars/vans were the most common mode of transport for commuters before the pandemic, followed by walking and rail



Q. Thinking back to the period immediately before the first UK-wide 'lockdown', which, if any, of the following methods of transport did you use when travelling to or from a place of work?

[Multiple answers permitted]



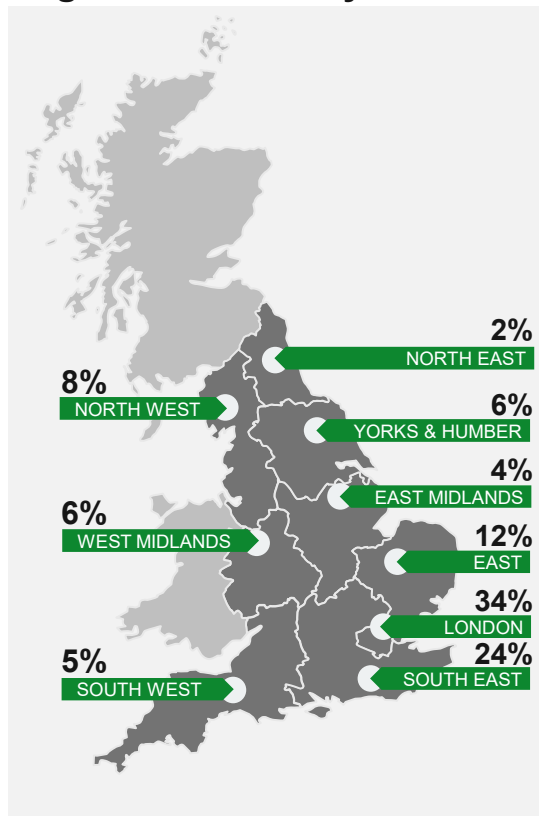
# Rail commuters before the pandemic

# Among pre-COVID *rail* commuters, most were full-time employed, from middle age groups, in higher income households, living in London or the South East

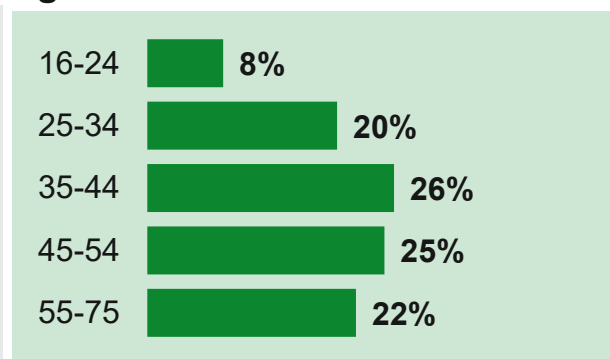


Demographic profile of the 21% of pre-COVID commuters who used rail before the pandemic (n=1,263)

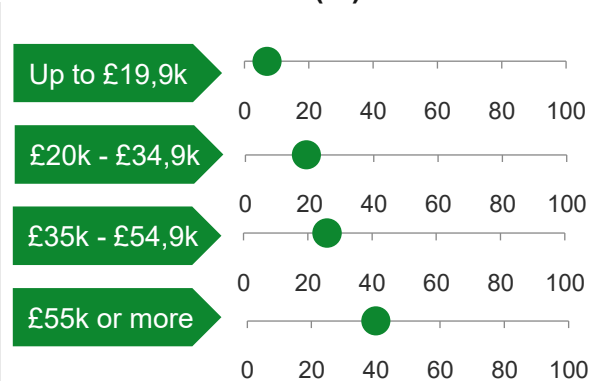
## Region of residency



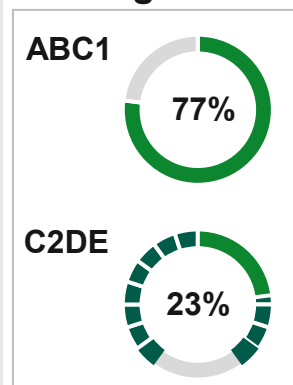
## Age



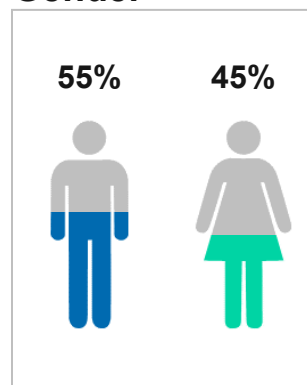
## Household income (%)



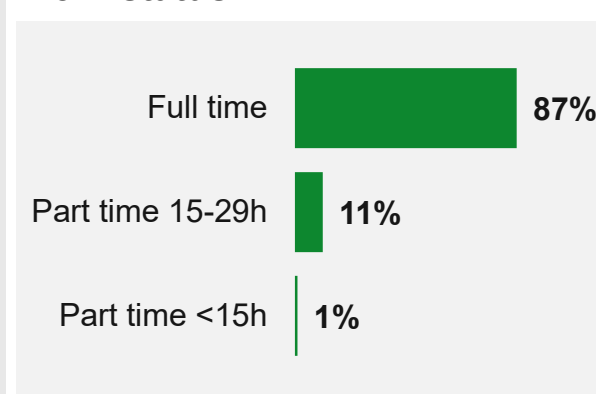
## Social grade



## Gender



## Work status







# Rail commuters were more likely to commute part-time before the pandemic compared with the average

Working and commuting patterns of pre-COVID rail commuters (n=1,263)

## Frequency of commute pre-pandemic

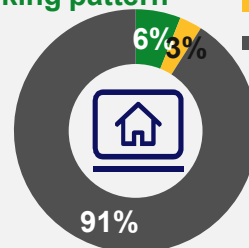


## Flexible working (% did at least sometimes pre-pandemic)

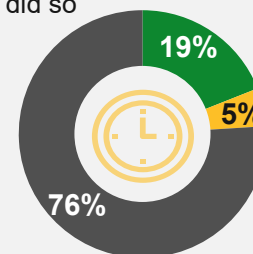
61% took up at least one flexible working pattern

■ Did so at least sometimes  
■ Hardly ever/never did so  
■ Were not able to\*

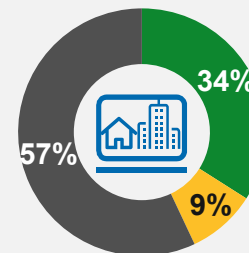
Work from home all of the time



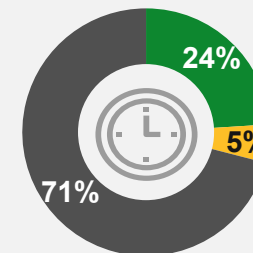
Start/finish during peak hours



Work from home some of the time



Commute during off-peak hours



## Commuting pattern (% did pre-pandemic)

● I tended to travel to work at the same place of work every day

● I tended to work partly at home and partly at a workplace(s) ▲ 13% average

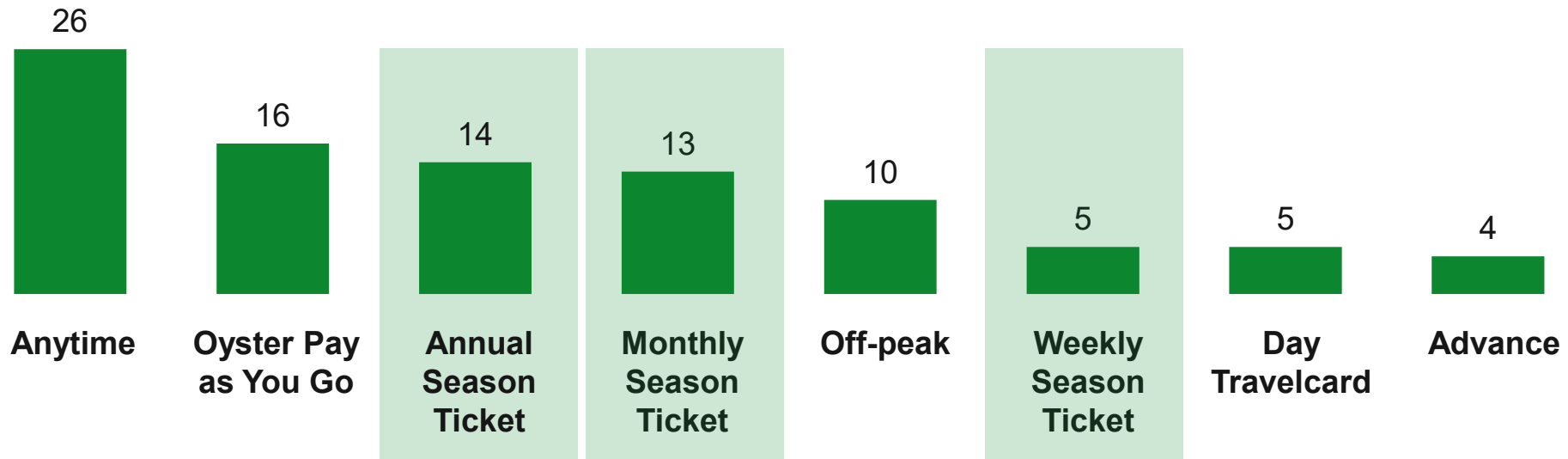
● I tended to travel to work at more than one workplace ▲ 13% average



# One third of pre-COVID rail commuters mainly used season tickets before the pandemic



Q. Which, if any, of the following types of rail ticket did you use to mainly use for your commute? (%)



More likely to use **season tickets** before COVID-19:

- aged **35-44** or **55-75**

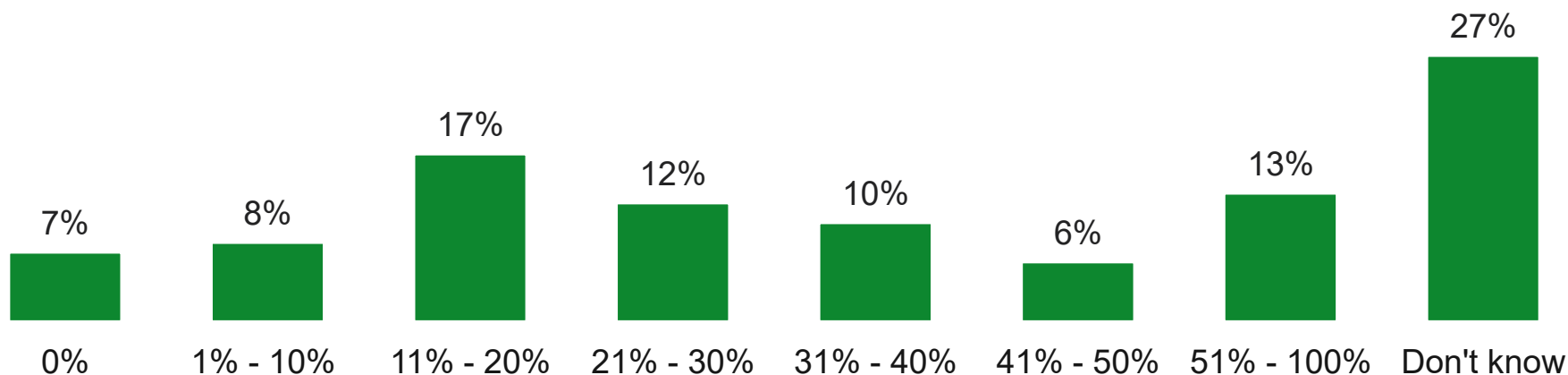
- in **higher income households** of over £55k

compared with **32% on average**. There might be other sub-group differences, but base sizes are small to report on.

# But there was a great deal of uncertainty about the level of discount offered for rail tickets used for commuting prior to COVID-19



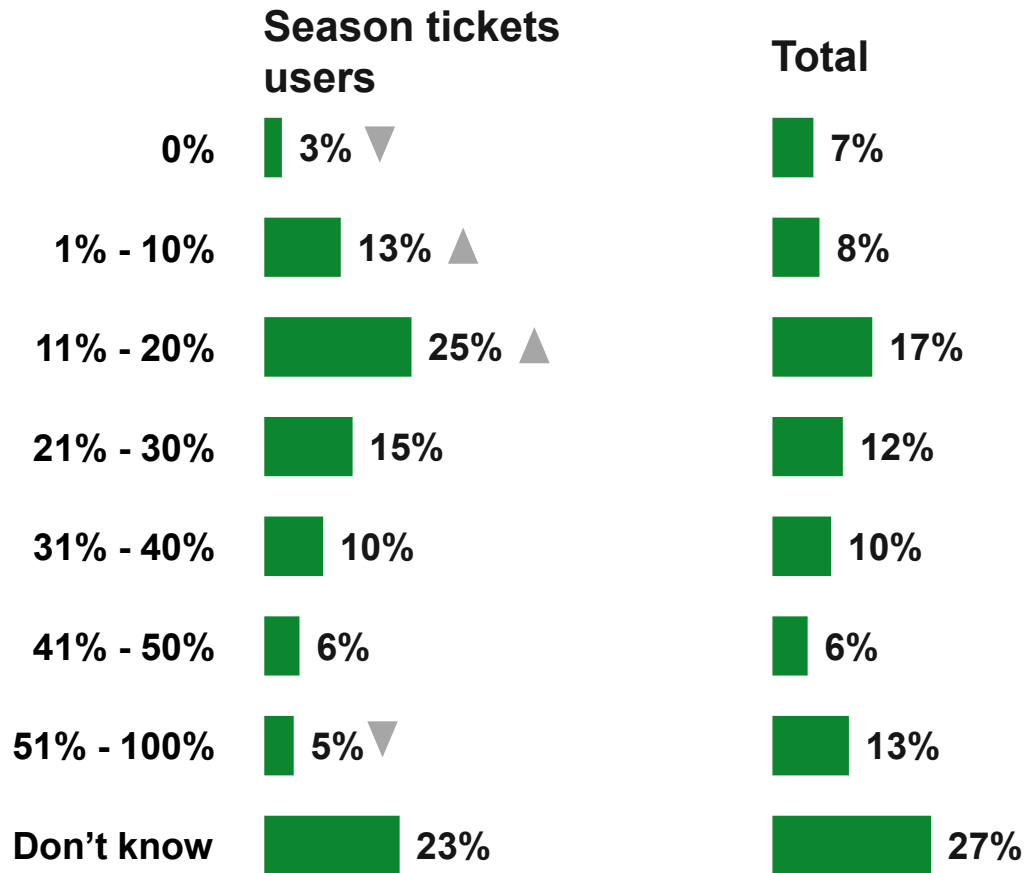
Q. Thinking about the rail ticket you mainly used for your commute in that period, what level of discount, if any, do you think this gives you compared to peak-time day return tickets bought separately? Please give your answer as a percentage from 0% to 100%.



# Season ticket holders typically less likely to think their ticket gives them a larger discount, though around a quarter unsure



Q. Thinking about the rail ticket you mainly used for your commute in that period, if any, do you think this gives you compared to peak-time day return tickets bought separately? Please give your answer as a percentage from 0% to 100%.



▲ ▼ Indicate significant differences compared with the average



Department for Transport

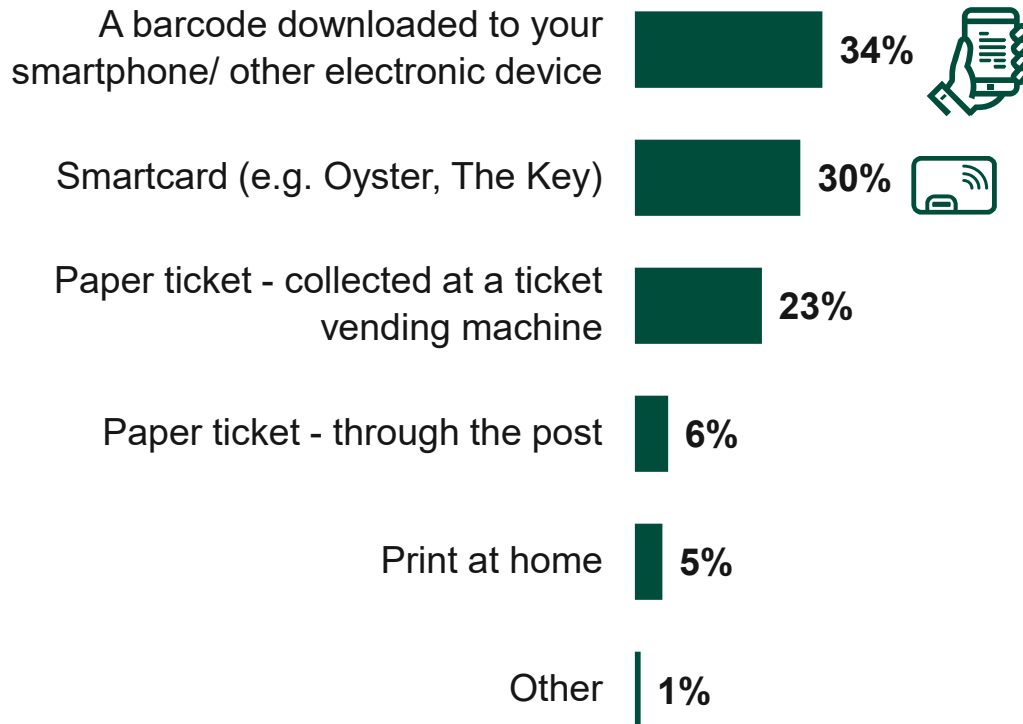
Source: Ipsos MORI/DfT

Base: All commuters who used rail before the pandemic started and bought any rail ticket except Anytime/Standard/Peak Single/Return (927) and used season tickets (annual, monthly or weekly) (430). 2-14 April 2021

# Of those who buy their tickets online, most normally receive their tickets as a barcode or a smartcard



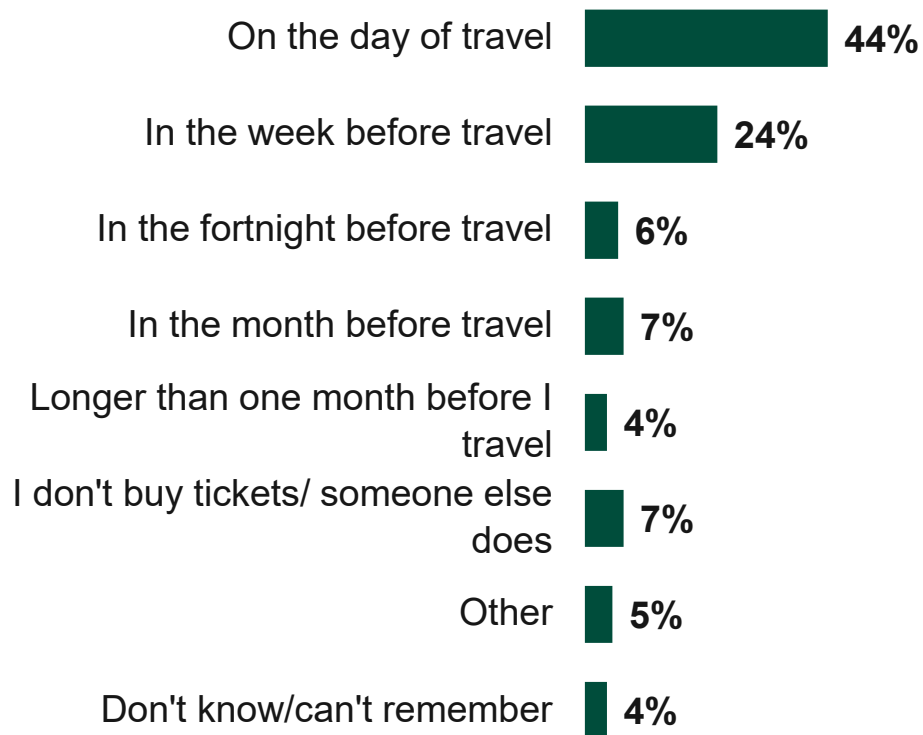
Q. How do you normally receive your tickets when buying them online?





# Seven in ten typically bought tickets in the week before or on the day of travel

Q. When have you typically bought your tickets when travelling by train for commuting purposes?



# This chapter answers the following research questions:

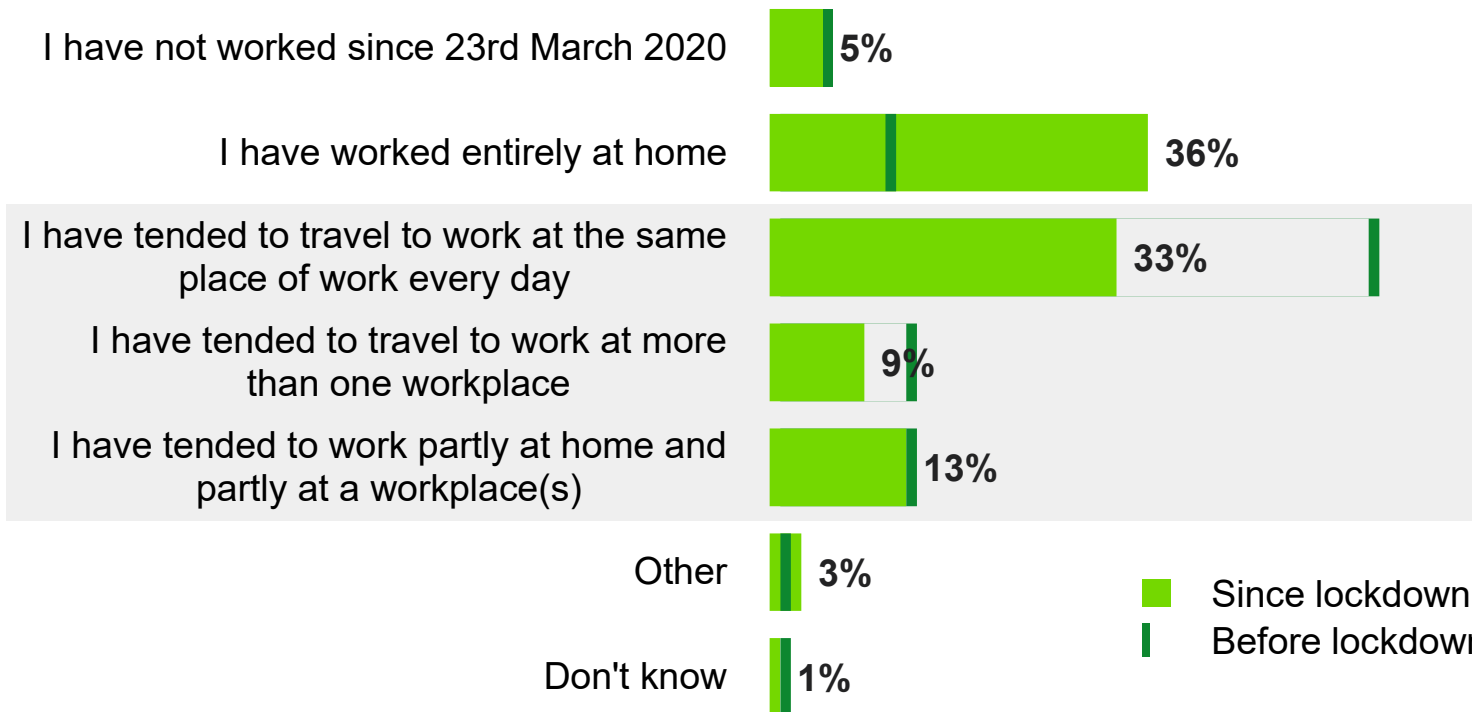
- **What impact did the pandemic have on working and commuting patterns? What modes of transport did pre-COVID commuters use since the pandemic started?**
- **Which demographic groups were more likely to commute part-time since the pandemic started?**
- **What about pre-COVID rail commuters in particular? How often did they commute since the pandemic started, and what modes of transport did they use? What rail tickets did they purchase and why?**

# Impacts of the **pandemic** on workers and commuters



# The pandemic significantly reduced the number of daily commuters...

Q. Thinking about the period since the first UK-wide 'lockdown' started on 23rd March 2020, which of the following applies to you personally?



Commuters

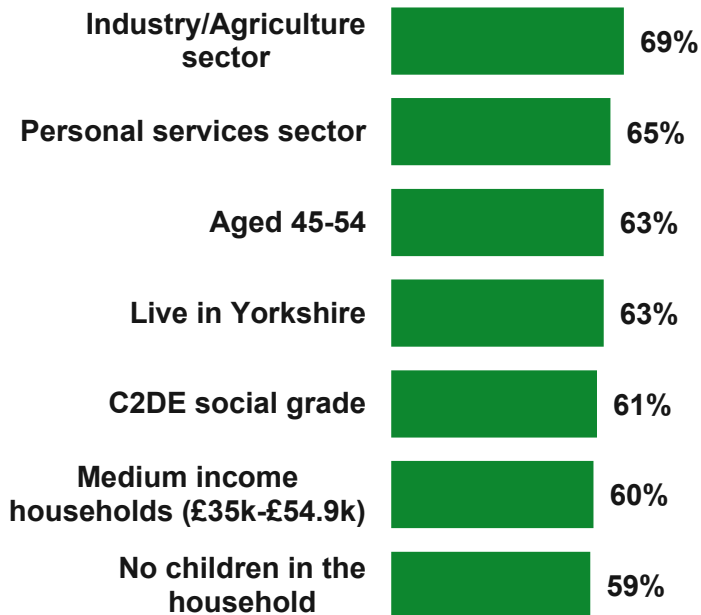
 55%

 83%

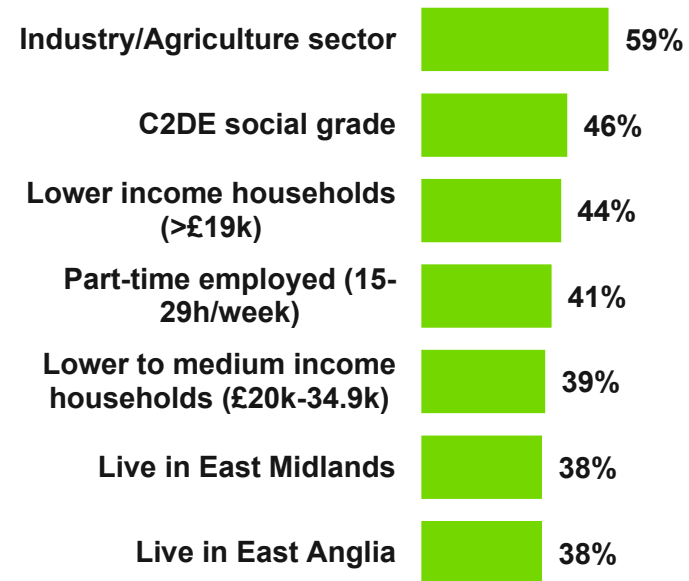
# Those most likely to commute to the same place of work every day included medium income households before the pandemic, but the profile changed during COVID-19

Demographic differences for those who tended to work at the same place of work every day:

**GROUPS WHO ARE MORE LIKELY TO DO SO BEFORE LOCKDOWN (AVERAGE 57%)**



**GROUPS WHO ARE MORE LIKELY TO DO SO SINCE LOCKDOWN (AVERAGE 33%)**



Source: Ipsos MORI/DfT

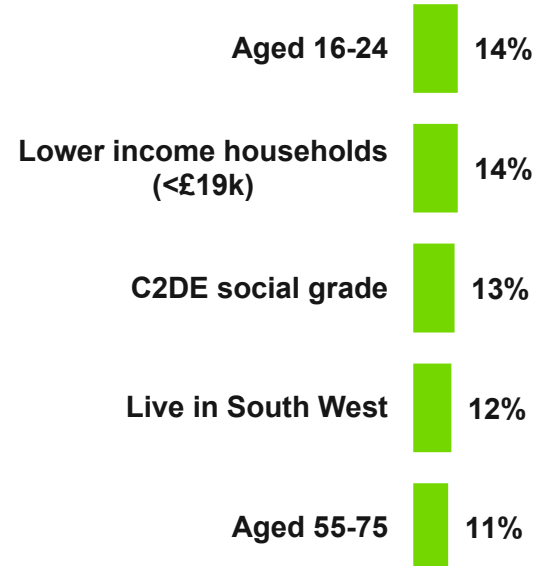
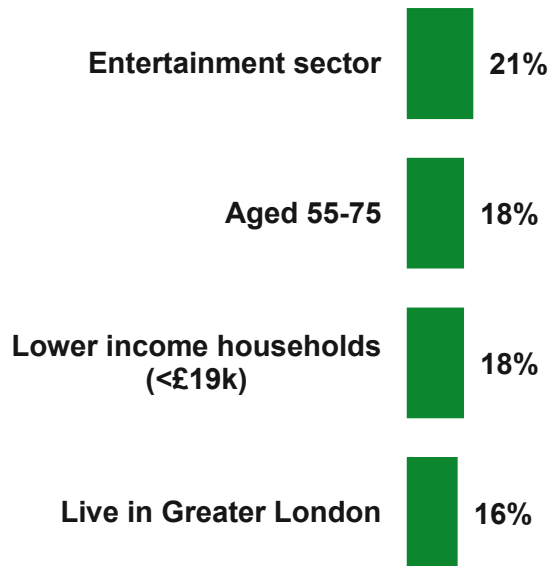
Base: All currently in work (6,825); who work in the Industry/Agriculture (166) or Personal services (1,321) sectors; aged 45-54 (1,428); live in Yorkshire (621) East Midlands (554) or East Anglia (716); C2DE social grade (1,139); with household income up to £19.9k (810); £20k-£34.9k (1,507); £35k-£54.9k (1,879); with no children in the household (4,238); part-time employed (1,540). 2-14 April 2021

# Older adults aged 55-75 and in lower income households among those more likely to commute to more than one workplace before and since lockdown

Demographic differences for those who tended to travel to work at more than one workplace:

**GROUPS WHO ARE MORE LIKELY TO DO SO BEFORE LOCKDOWN (AVERAGE 9%)**

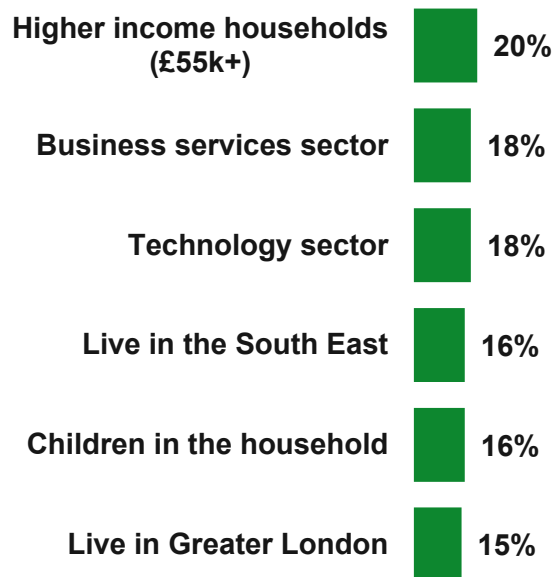
**GROUPS WHO ARE MORE LIKELY TO DO SO SINCE LOCKDOWN (AVERAGE 9%)**



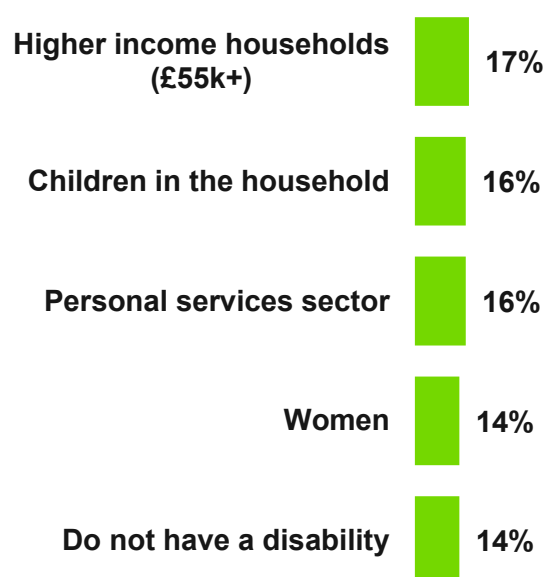
# Those with children in the household and higher income households among those more likely to have a hybrid working pattern between home and workplace before and since lockdown

Demographic differences for those who tended to work partly at home, partly at a workplace:

**GROUPS WHO ARE MORE LIKELY TO DO SO BEFORE LOCKDOWN (AVERAGE 13%)**



**GROUPS WHO ARE MORE LIKELY TO DO SO SINCE LOCKDOWN (AVERAGE 13%)**



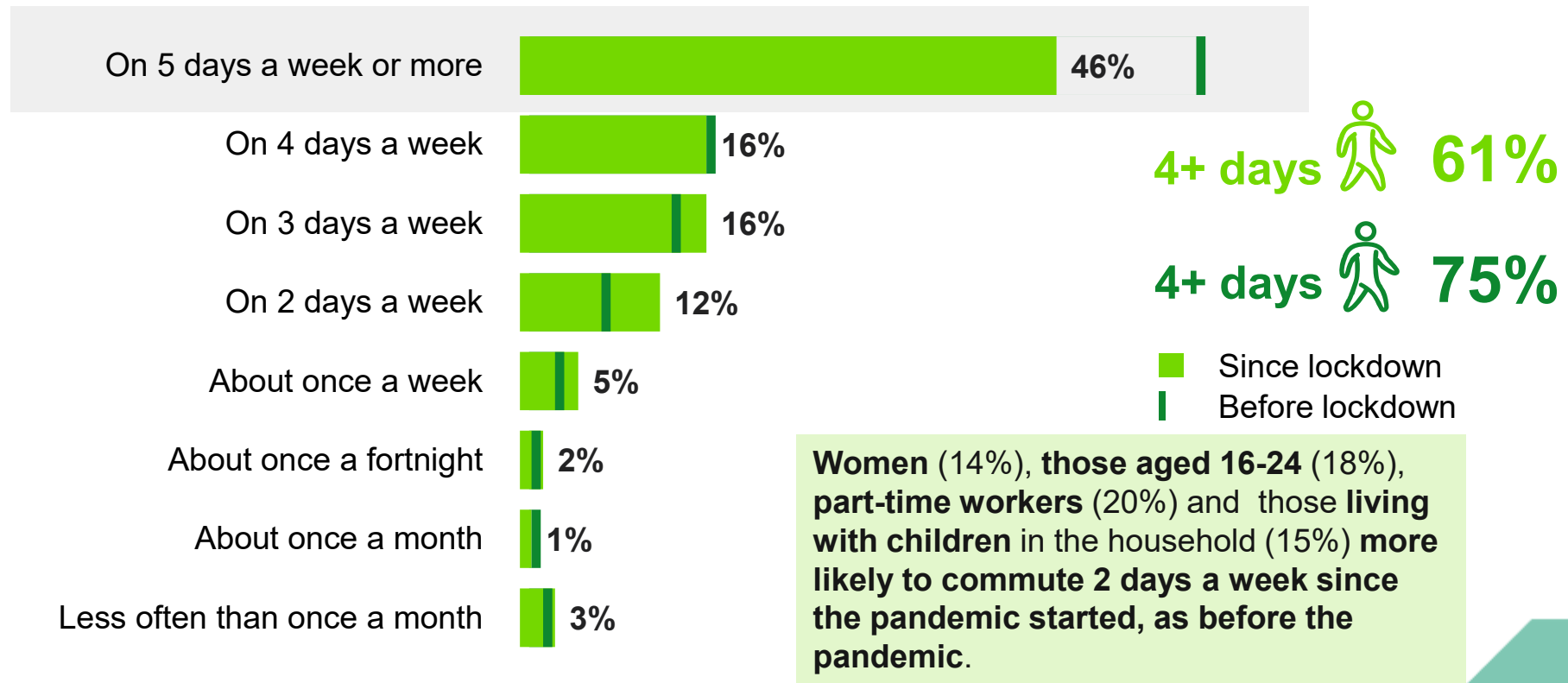
Source: Ipsos MORI/DfT

Base: All currently in work (6,825); who work in the Business services (732) or Technology (395) or Personal services (1,321) sectors; live in the South East (1,172) or Greater London (1,381); with household income £55k or more (1,994); with children in the household (2,587); women (4,222); without disability (5,403). 2-14 April 2021



# The pandemic also changed the frequency of commuting patterns during COVID-19. Part-time workers and younger people continued to be more likely to commute 2 days per week

Q. Thinking about the period since the first UK-wide 'lockdown' started on 23rd March 2020, on average, how often, have you travelled to a place of work, by any mode of transport?



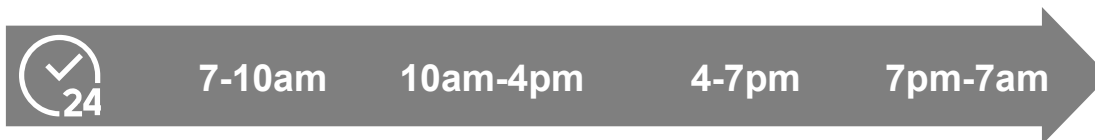
# Commuting *patterns* remained broadly similar, but more COVID commuters travelled off-peak



Q. Still thinking back to the period since the first UK-wide 'lockdown' started on 23rd March, in an average week, on which of the following days did you tend to travel between...? % [Multiple answers permitted]

Day	7-10am	10am-4pm	4-7pm	7pm-7am
Mon	62 ▼	29 ▲	46 ▼	20 ▲
Tue	61 ▼	32 ▲	45 ▼	21 ▲
Wed	62 ▼	33 ▲	49 ▼	21 ▲
Thu	59 ▼	32 ▲	48 ▼	21 ▲
Fri	54 ▼	31 ▲	45 ▼	22 ▲
Sat	16 ▲	15 ▲	15 ▲	16 ▲
Sun	9 ▲	10 ▲	9	11 ▲
X	17 ▲	46 ▼	30 ▲	62 ▼

▲ ▼ Indicate significant differences compared with before the lockdown

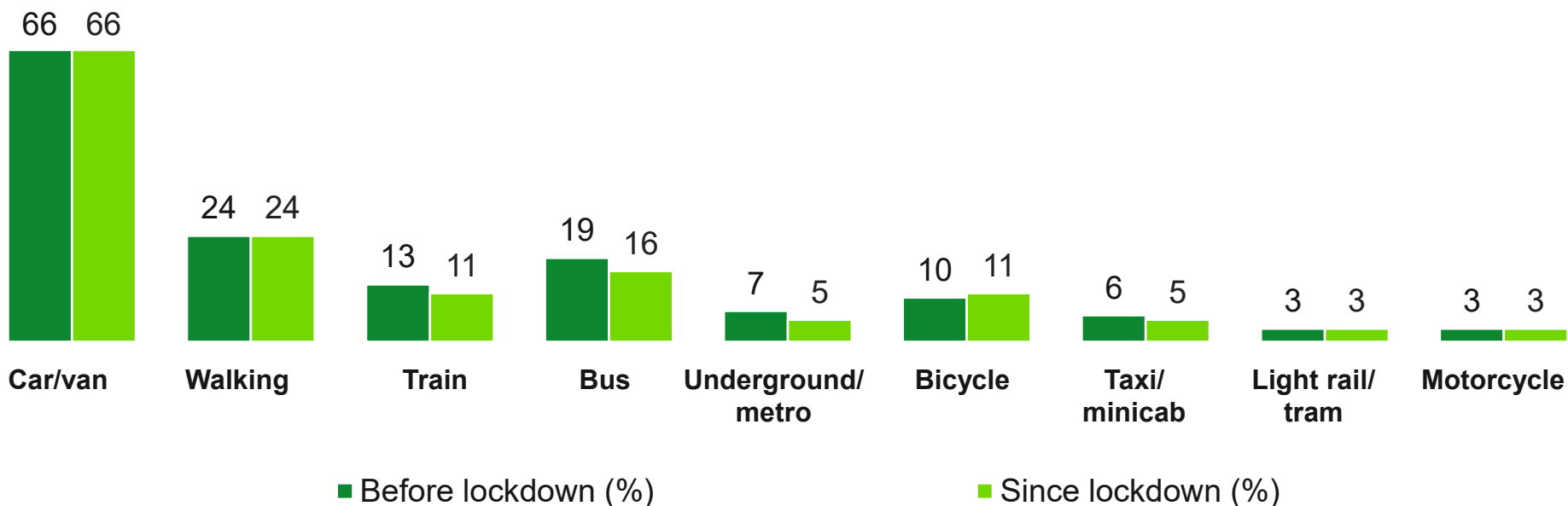


# Public transport use for commuting dropped slightly during the pandemic among commuters who *continued* to commute during the pandemic



Q. Thinking back to the period immediately before the first UK-wide 'lockdown', which, if any, of the following methods of transport did you use when travelling to or from a place of work / Q. Thinking about the past 12 months or so since the first UK-wide 'lockdown' started on 23rd March 2020, which of the following methods of transport did you use when travelling to a place of work?

[Multiple answers permitted]

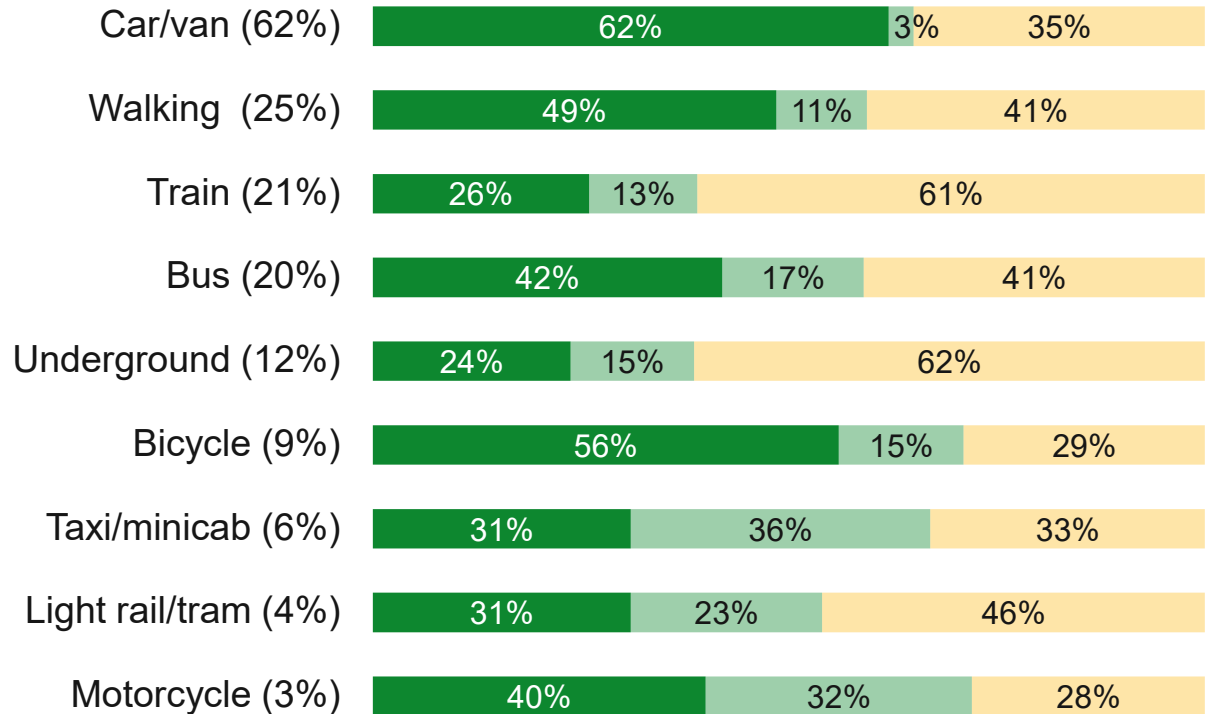




# Limited evidence of mode shift during lockdown – most COVID commuters used the same mode as they did before



(% pre-lockdown commuting by this mode in brackets)



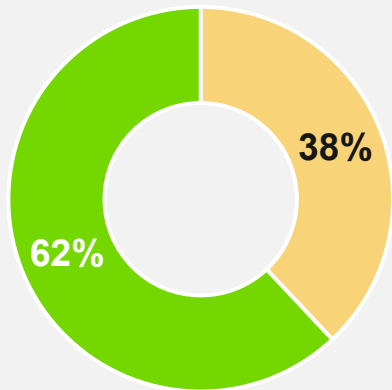
- Continued to commute during Covid, using the same mode
- Continued to commute during Covid, using a different mode
- Did not commute during Covid at all



# Some very limited mode shift to/from rail, but not for the majority of pre-COVID commuters who have still commuted during the pandemic

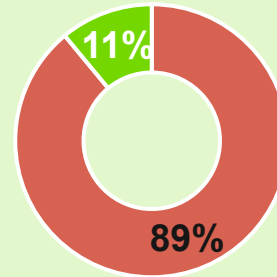


Pre-COVID commuters

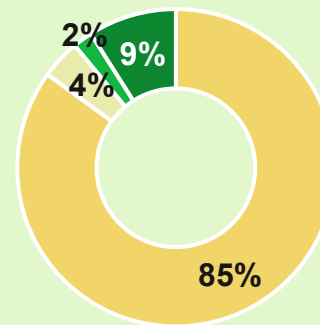


- Did not commute at all since the pandemic
- Committed since the pandemic

Of the 62% of pre-COVID commuters who commuted since the pandemic started (=3,250)



- Did NOT use rail for commuting since the pandemic
- Did use rail for commuting since the pandemic



- Did not use rail, and had not used rail before
- Did not use rail, but had used rail before
- Used rail, but had not used rail before
- Used rail, and had used rail before

# Impacts of the **pandemic** on **rail** commuters specifically

# Rail commuting during COVID-19 looked very different, with more part-time commuters and fewer using season tickets



Working and commuting patterns of pre-COVID rail commuters who commuted since lockdown (n=305)

## Frequency of commute since the pandemic



Four or more days per week



Once to three days per week



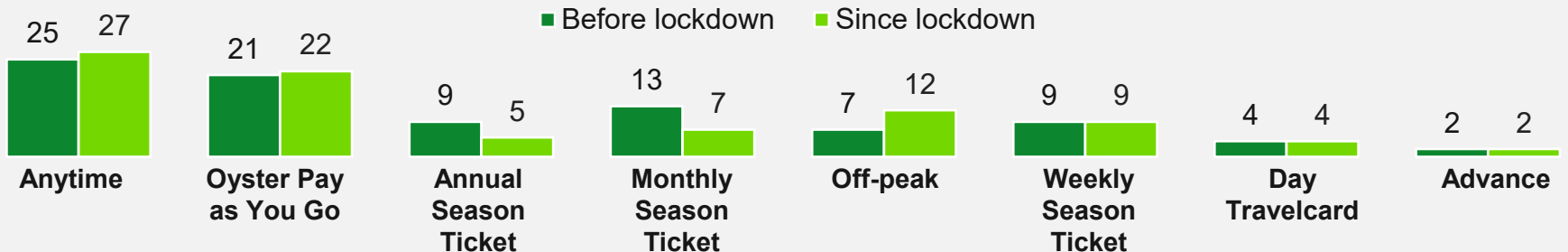
Less often than weekly

## Commuting pattern since the pandemic started

- I have tended to travel to work at the same place of work every day
- I have tended to travel to work at more than one workplace
- I have tended to work partly at home and partly at a workplace(s)



## Use of rail tickets pre-pandemic vs. since the pandemic started



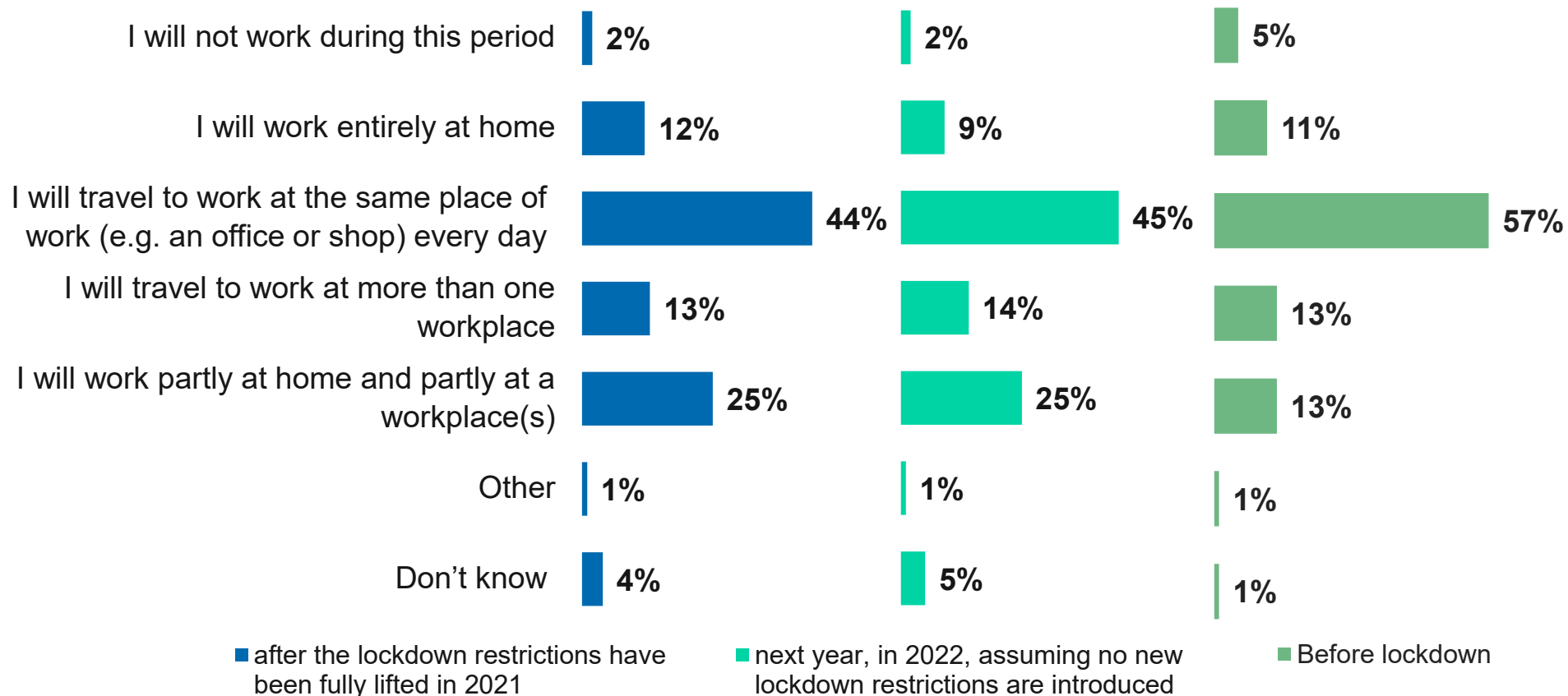
# This chapter answers the following research questions:

- What are the expected working and commuting patterns after the pandemic, once restrictions are fully lifted? What modes of transport do future commuters expect to use? What are the barriers that prevent their use of rail as their main mode for commuting purposes?
- Which demographic groups are more likely to commute part-time after the pandemic?
- What about future rail commuters in particular? How often do they expect to commute, and what proportion will be transitioning from full-time to part-time commuting? What flexibility do they expect to have at work?
- What rail tickets do they expect to purchase and why?

# Working and **commuting** expectations **after** the pandemic

# Far fewer workers expect to commute every day- the proportion expecting to split their time between work and home has doubled

Q. Please imagine that lockdown restrictions are fully lifted on 21st June 2021. Which, if any, of the following do you expect to apply to you personally?

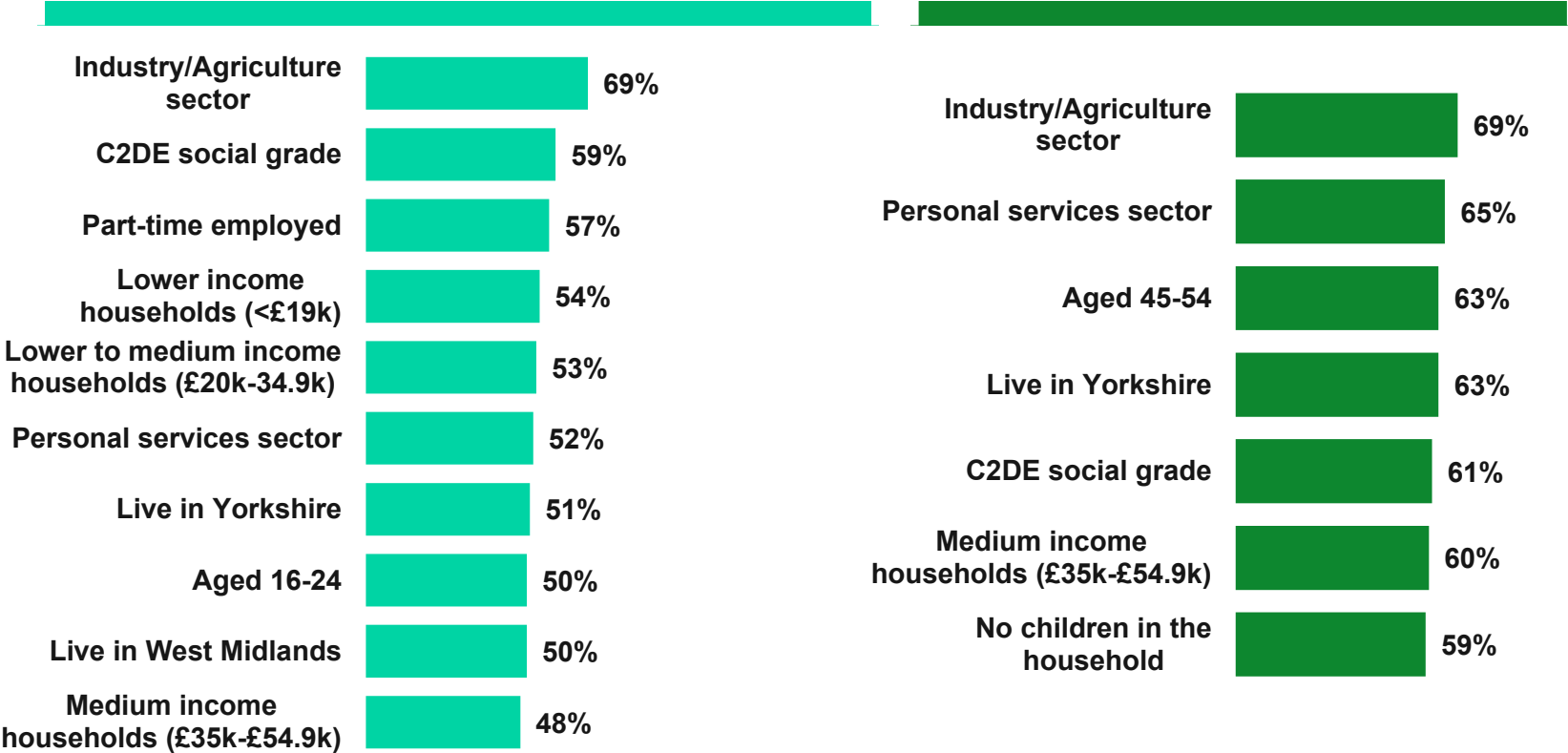


# Those groups likely still to travel to the same place of work every day after lockdown tend to work in the same sectors, and come from a lower socio-economic background

Demographic differences for those who expect to travel to work at the same place of work every day:

**GROUPS WHO ARE MORE LIKELY TO EXPECT TO DO SO IN 2022, AFTER THE PANDEMIC (AVERAGE 45%)**

**GROUPS WHO ARE MORE LIKELY TO DO SO BEFORE LOCKDOWN (AVERAGE 57%)**



Source: Ipsos MORI/DfT

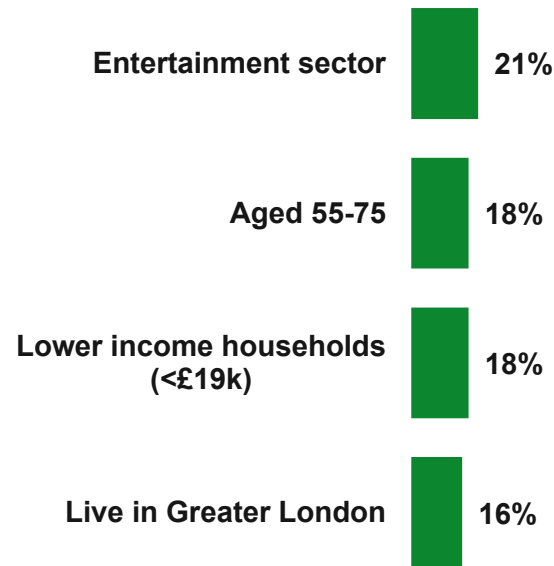
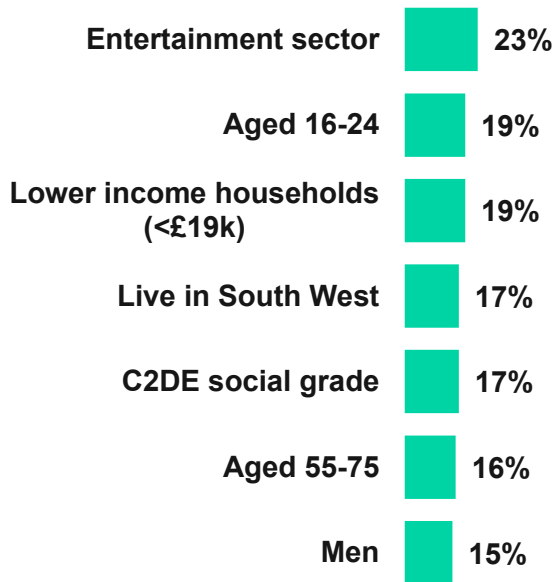
Base: All currently in work (6,825); who work in the Industry/Agriculture (166) or Personal services (1,321) sectors; aged 16-24 (790); 45-54 (1,428); live in Yorkshire (621) or West Midlands (652); C2DE social grade (1,139); with household income up to £19.9k (810); £20k-£34.9k (1,507); £35k-£54.9k (1,879); with no children in the household (4,238); part-time employed (1,540). 2-14 April 2021

# And older adults and those in lower income households are similarly more likely to commute to more than one workplace in future, as they were before lockdown

Demographic differences for those who expect to travel to work at more than one workplace:

GROUPS WHO ARE MORE LIKELY TO EXPECT TO DO SO IN 2022, AFTER THE PANDEMIC (AVERAGE 14%)

GROUPS WHO ARE MORE LIKELY TO DO SO BEFORE LOCKDOWN (AVERAGE 9%)

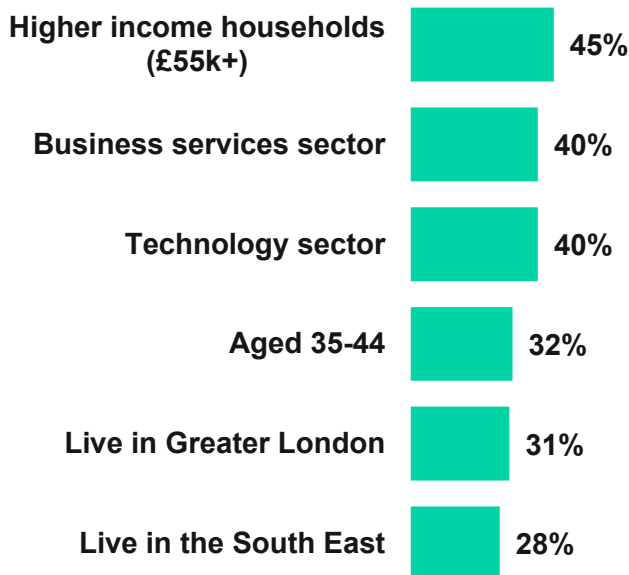




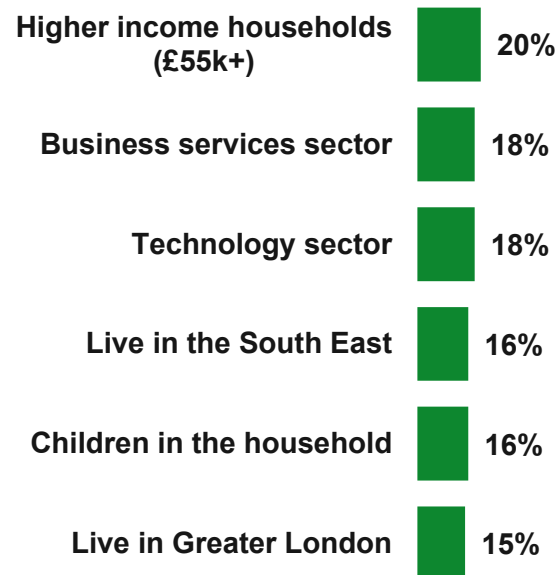
# Higher income households are most likely to have a hybrid commuting pattern in 2022, as before lockdown

Demographic differences for those who expect to travel to work partly at home, partly at a workplace:

GROUPS WHO ARE MORE LIKELY TO EXPECT TO DO SO IN 2022, AFTER THE PANDEMIC (AVERAGE 25%)



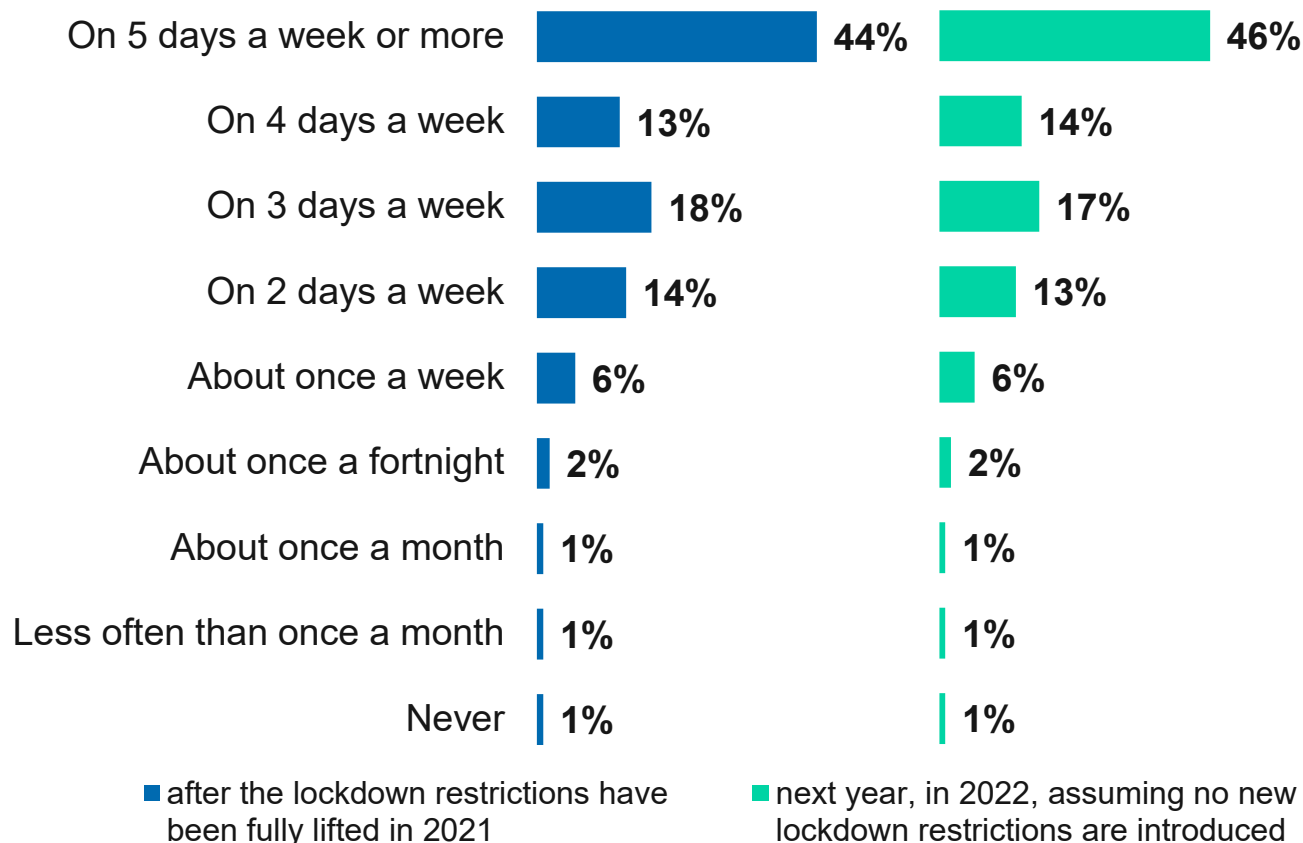
GROUPS WHO ARE MORE LIKELY TO DO SO BEFORE LOCKDOWN (AVERAGE 13%)




# There could be a modest increase in commuting frequency between 2021 and 2022, after lockdown restrictions are fully lifted




Q. On average, how often, if at all, do you expect to travel to or from a place of work or education, by any mode of transport ...? If you are unsure, please give your best estimate.





**Intend to commute 4+ days/week**

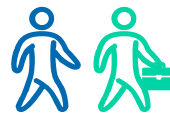
 **57%**

 **60%**

*In the past*

 **75%**

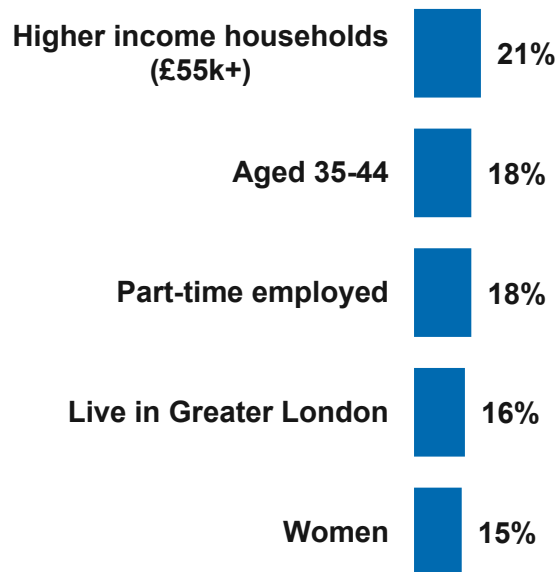
 **61%**



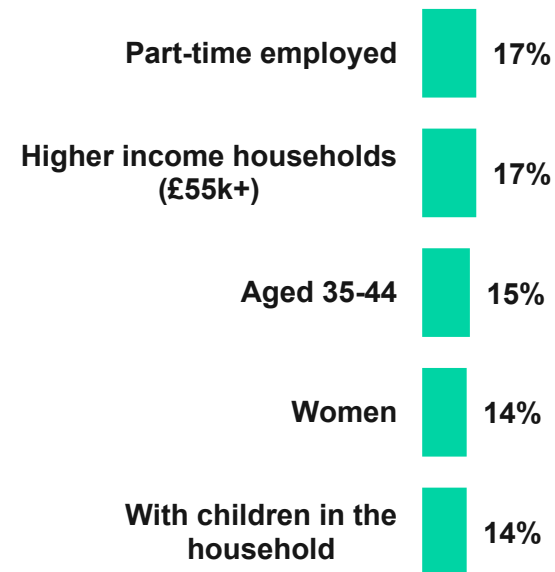
# Those aged 35-44, part-time workers and higher income households are among those more likely to commute 2 days per week this year and next

Demographic differences for those who expect to travel to work partly at home, partly at a workplace:

## GROUPS WHO ARE MORE LIKELY TO COMMUTE 2 DAYS/WEEK IN 2021 (AVERAGE 14%)



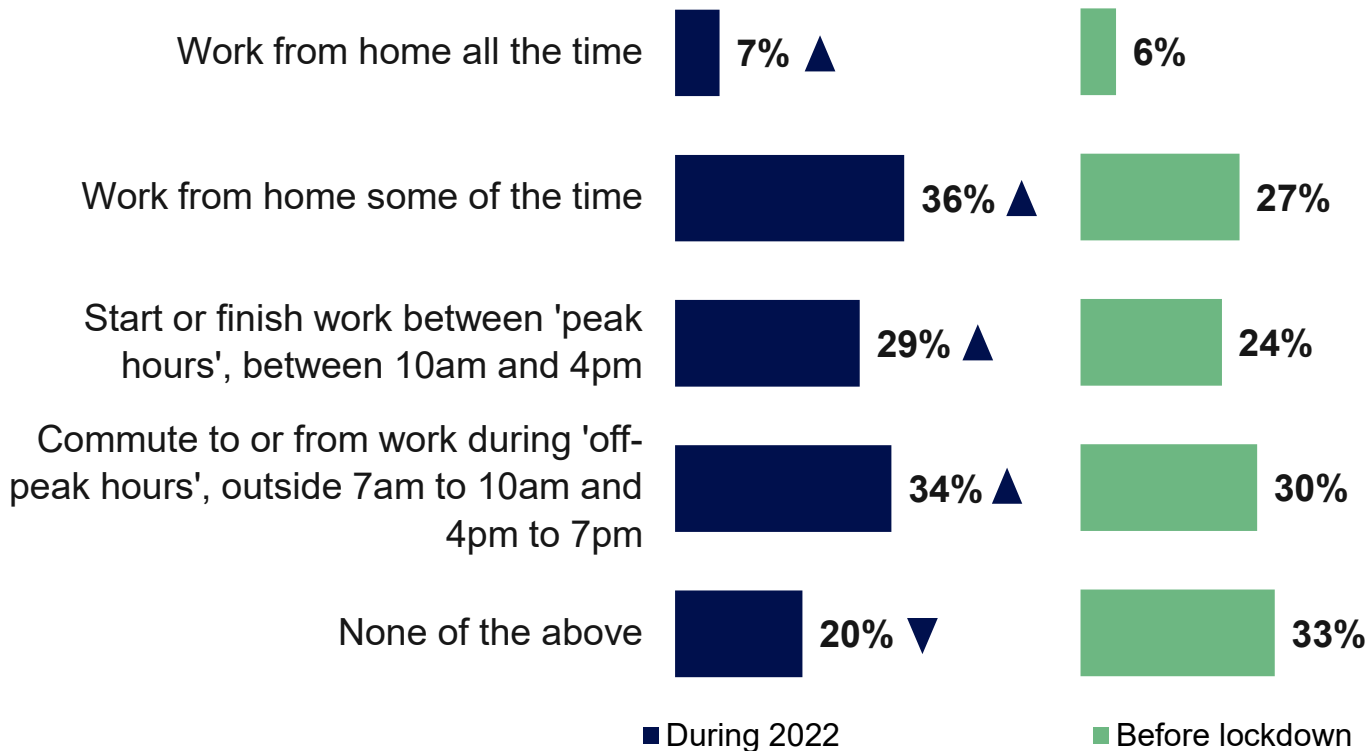
## GROUPS WHO ARE MORE LIKELY TO COMMUTE 2 DAYS/WEEK IN 2022 (AVERAGE 12%)





# More expect greater flexibility next year than they had pre-pandemic...

Q. During 2022, assuming no new lockdown restrictions are introduced, do you expect you will be able to do the following, if you choose to do so? [*Multiple answers permitted*]



Groups more likely to expect greater flexibility are broadly similar with those who had more flexibility before the pandemic too.

The main exceptions were with regards to commuting off-peak:

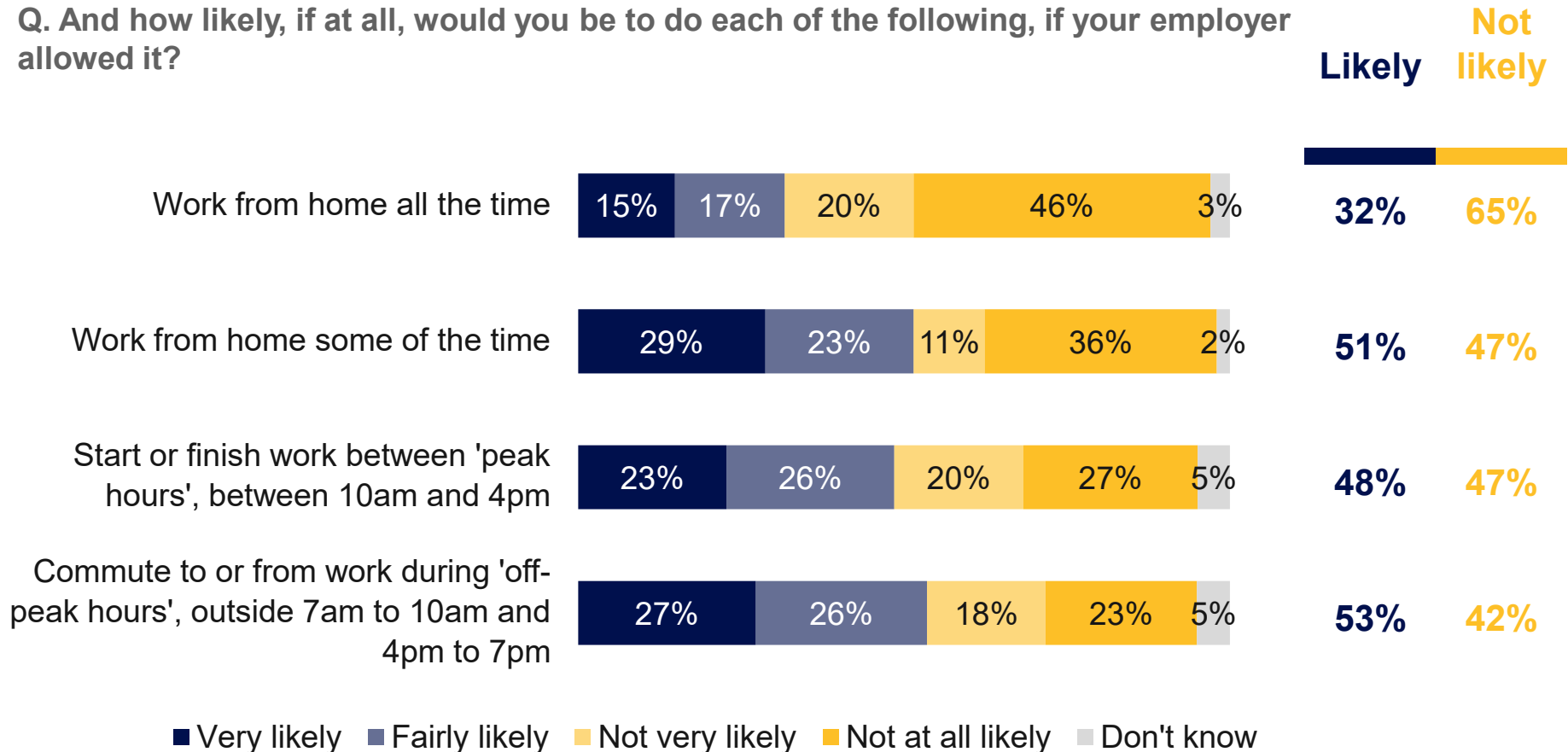
- Aged 45-54 are now *more* likely to expect to do so in future
- Those in London are now *less* likely to expect to do so in future

▲ ▼ Indicate significant differences compared with before the lockdown



# ...and many expect to take advantage

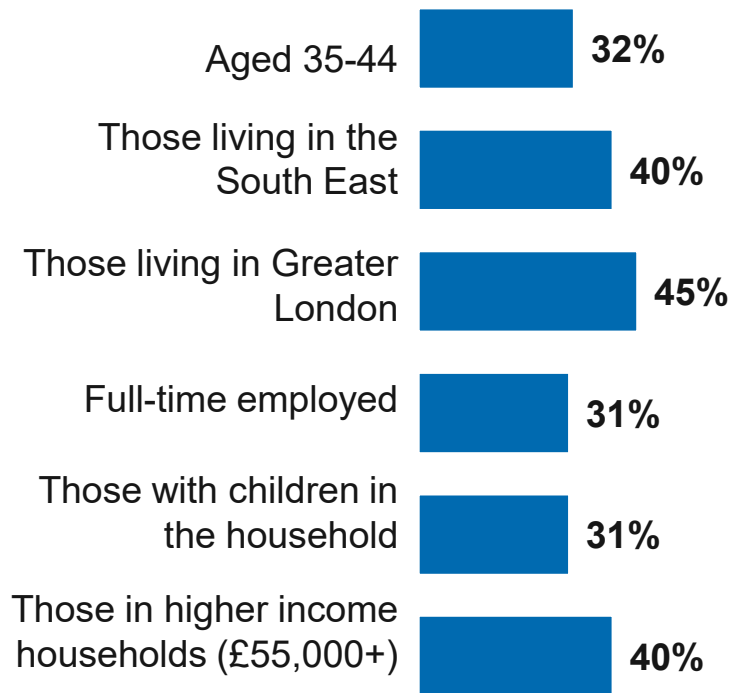
Q. And how likely, if at all, would you be to do each of the following, if your employer allowed it?



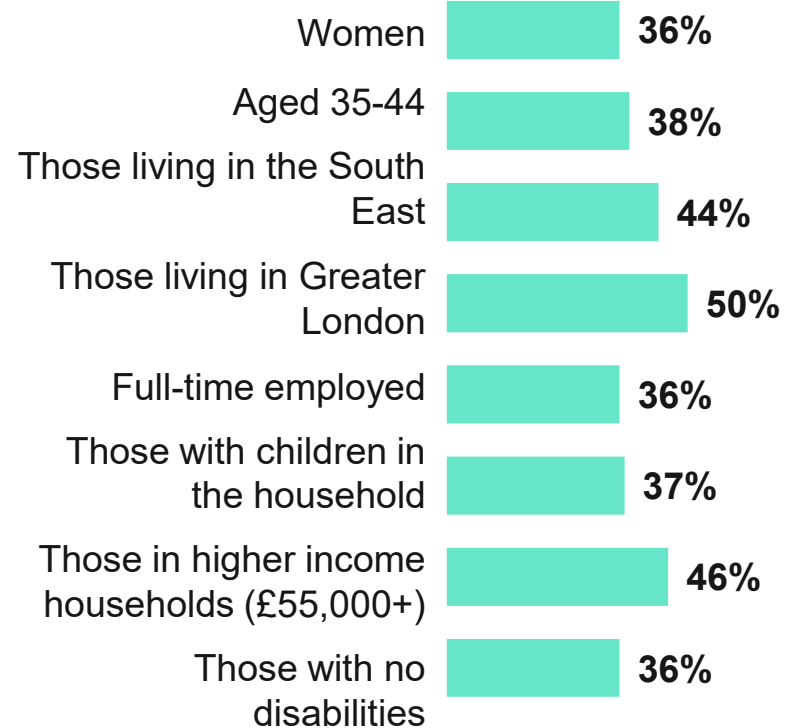
# Expectations of commuting with **rail after** the pandemic

# People in higher income households, and in London and the South East, are among those most likely to expect to use rail to commute at some point in 2021 or 2022

## GROUPS WHO ARE MORE LIKELY TO USE RAIL IN 2021 (29%)



## ...AND MORE LIKELY TO USE RAIL IN 2022 (35%)



# Just over one in five prospective rail commuters had never previously travelled to work by rail

*% among the 35% who expect to use rail in 2022*

**% Have used rail before (either before or since COVID-19)**



**% Have *not* used rail before (either before or since COVID-19), but commuted**



**% Did *not* commute before**





# Over four in ten rail commuters expect to commute part-time in 2022

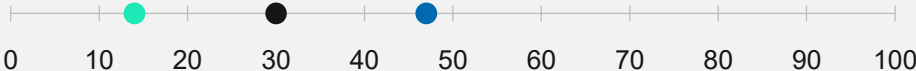
Expected working and commuting patterns of rail commuters (pre-pandemic or since it started) who intend to use rail in 2022 (n=1,171)

## Expected frequency of commute in 2022



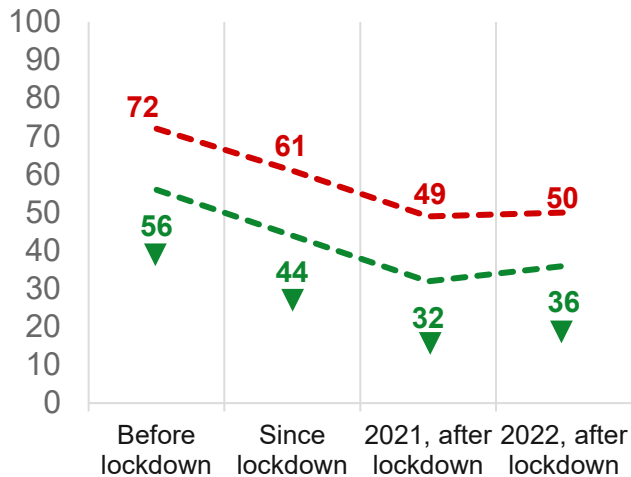
## Future commuting pattern (% expect to do in 2022)

- I will travel to work at the same place of work every day
- I will travel to work at more than one workplace
- I will work partly at home and partly at a workplace(s)

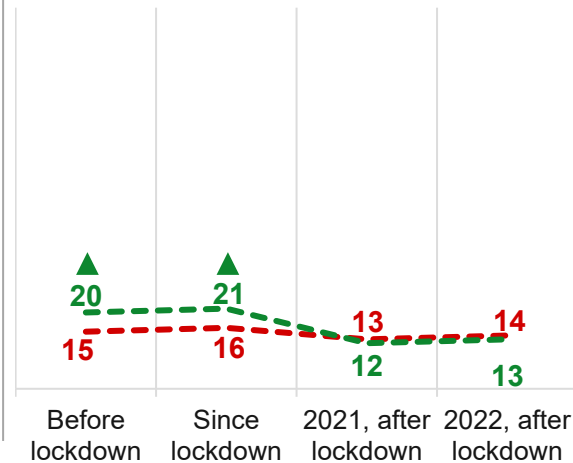


# Rail users were broadly more likely than non-users to expect to split their time between home and work, and less likely to commute daily in future

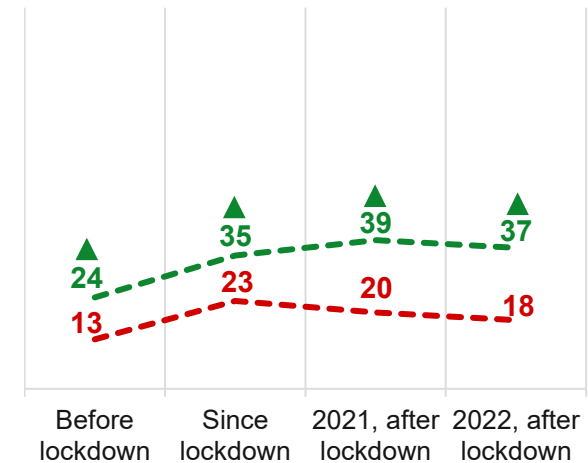
## Daily commuting to the same workplace



## Commuting to more than one workplace



## Partly commuting/ partly working at home



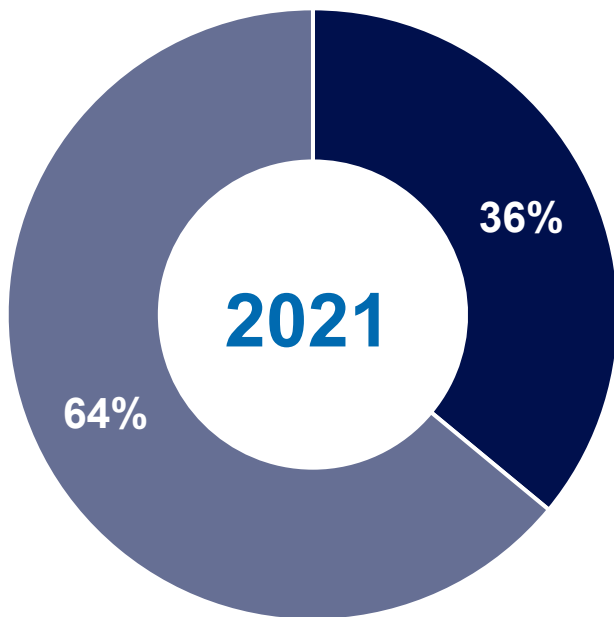
— Non-rail users    — Rail users

▲ ▼ Indicate significant differences compared with non-rail users of the same point in time

# A third of those who expect to use rail for commuting after the pandemic intend to use it as their *main* mode of transport

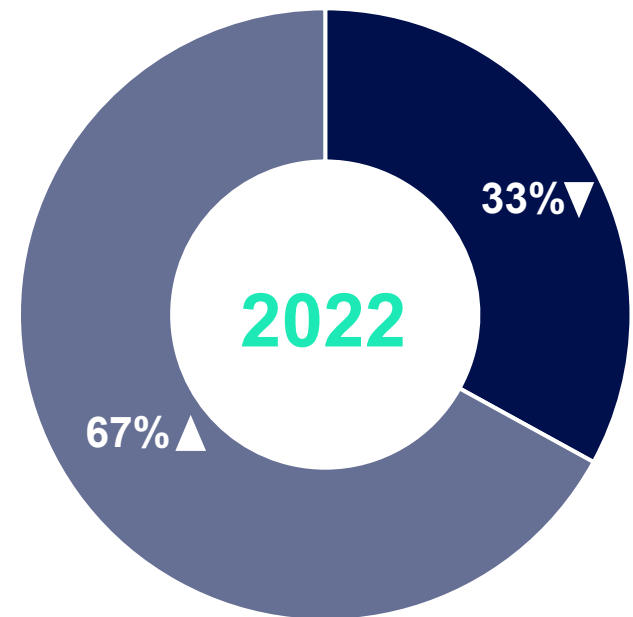


Q. And which of these do you expect to be your main method of transport to or from a place of work or education after the lockdown restrictions have been fully lifted in 2021/ next year, in 2022, assuming no new lockdown restrictions are introduced?



■ As main mode

■ Not as main mode



▲ ▼ Indicate significant differences compared with 2021

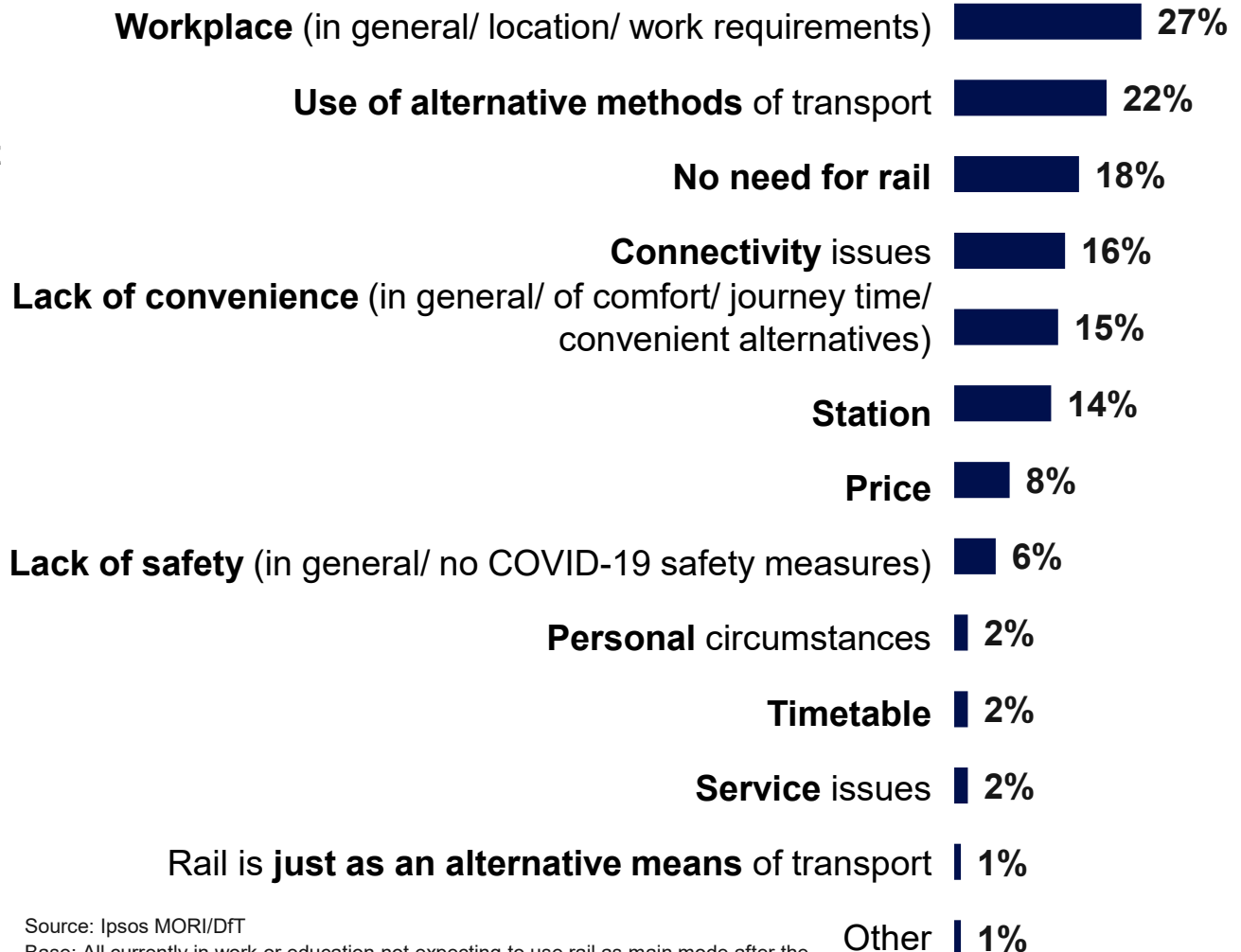
# Most common barriers to rail use as 'main mode' relate to workplace access/ requirements, and availability of alternative modes



Q. You said you do not expect to use train as your main method of transport to travel to or from work or education after the lockdown restrictions have been fully lifted. What makes you say that?

[Open-ended question]

% NETs



# Specifically, these comments most commonly relate to workplace location, a preference for car, and not needing to use rail for work



Q. You said you do not expect to use train as your main method of transport to travel to or from work or education after the lockdown restrictions have been fully lifted. What makes you say that?  
[Open-ended question]

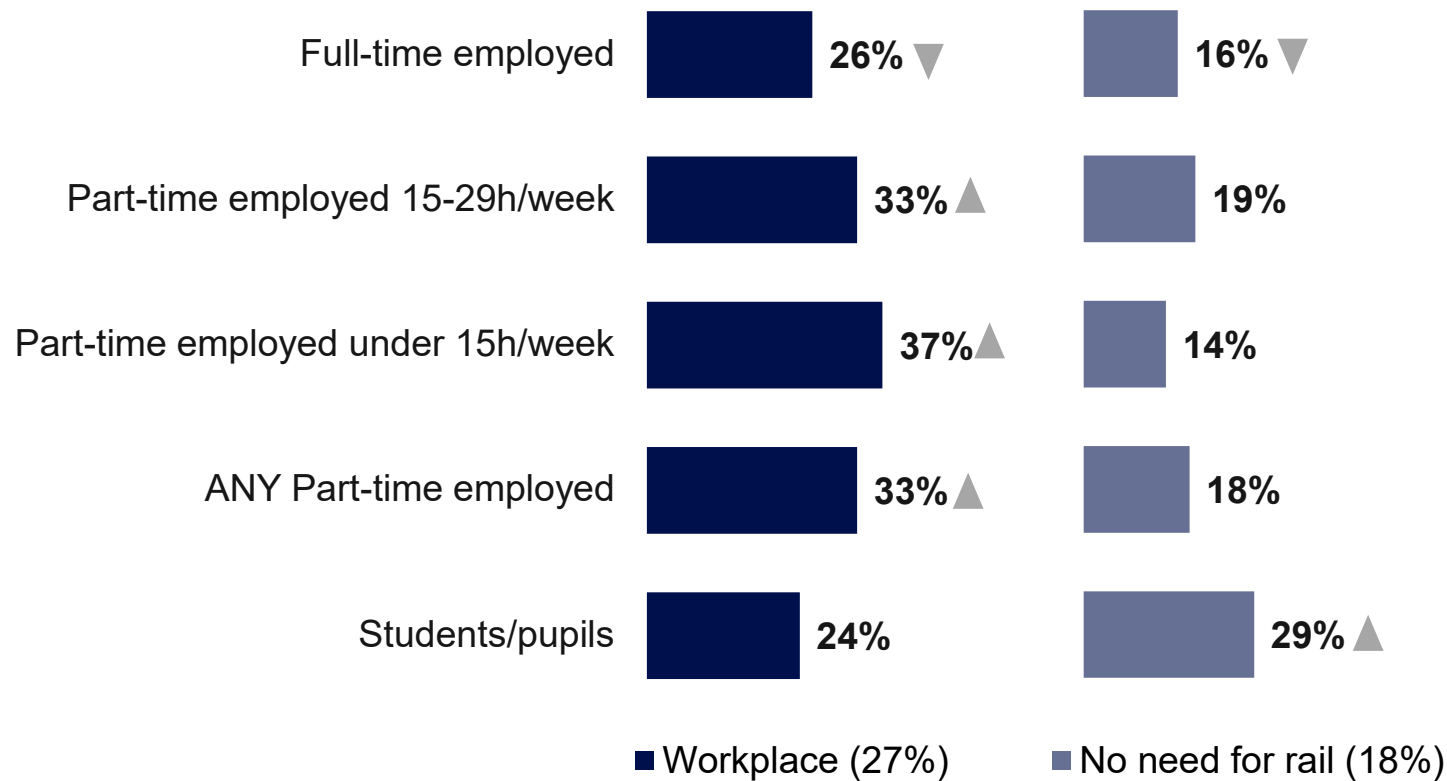
## Top 3 NETs

Workplace issues (27%)	Alternative method of transport (22%)	No need for rail (18%)
<b>Workplace location (23%)</b> (e.g. short distance/ local workplace or rarely go to the office)	<b>I have a car/ prefer driving (12%)</b>	<b>Unnecessary/ don't need to take it (12%)</b>
<b>Workplace in general (4%)</b> (e.g. unsuitable for my line of work, e.g. personal trainer / domiciliary care/ sales rep)	<b>I prefer walking (5%)</b>	<b>Don't use it/ have never used it/ rarely use it (5%)</b>
<b>Workplace requirements (3%)</b> (e.g. travel to numerous destinations)	<b>I prefer taking the bus (3%)</b>	<b>Not appropriate for my journey (1%)</b>

\*Note that only the highest % subnets are included here – see full data tables for more detail.

# Among non-users, reasons for non-use differ between full and part-time workers. Part-time workers are more likely to cite workplace-related barriers than full-time workers

*% who do not expect to use rail as main mode in future*



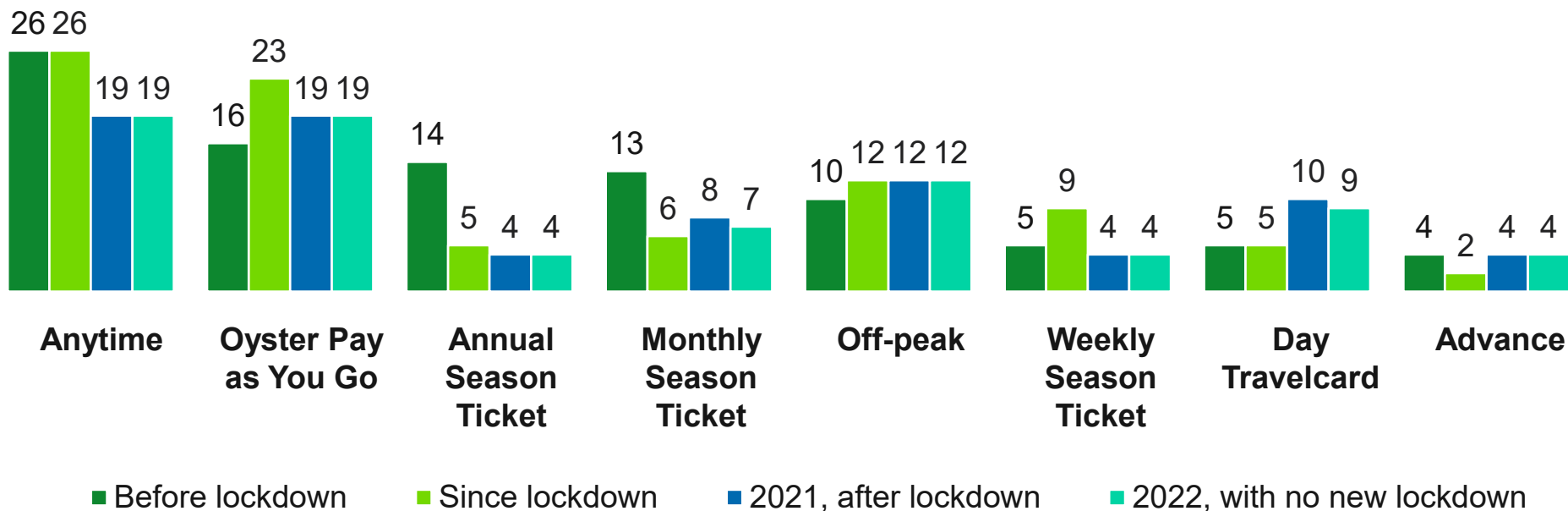
▲ ▼ Indicate significant differences compared with the average

# Expected **ticket purchasing** after the pandemic



# Season tickets appear very unlikely to recover after the pandemic

Q. Which, if any, of the following types of rail ticket did you use/ have you used/ do you expect to mainly use for your commute? (%)

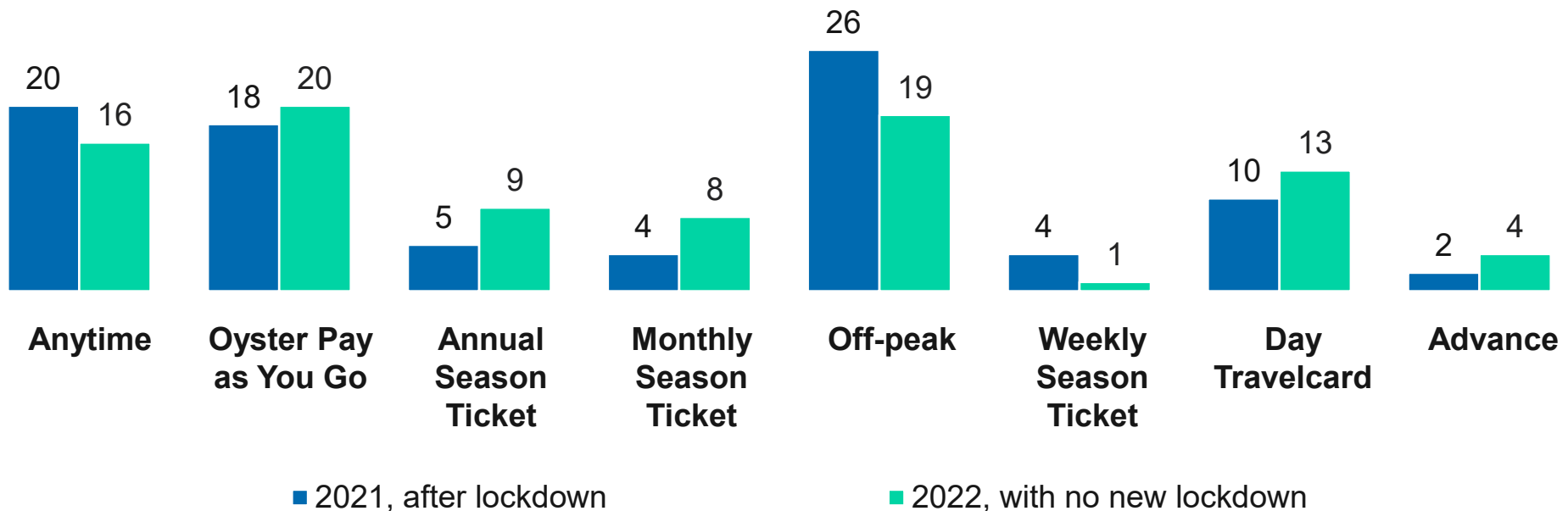




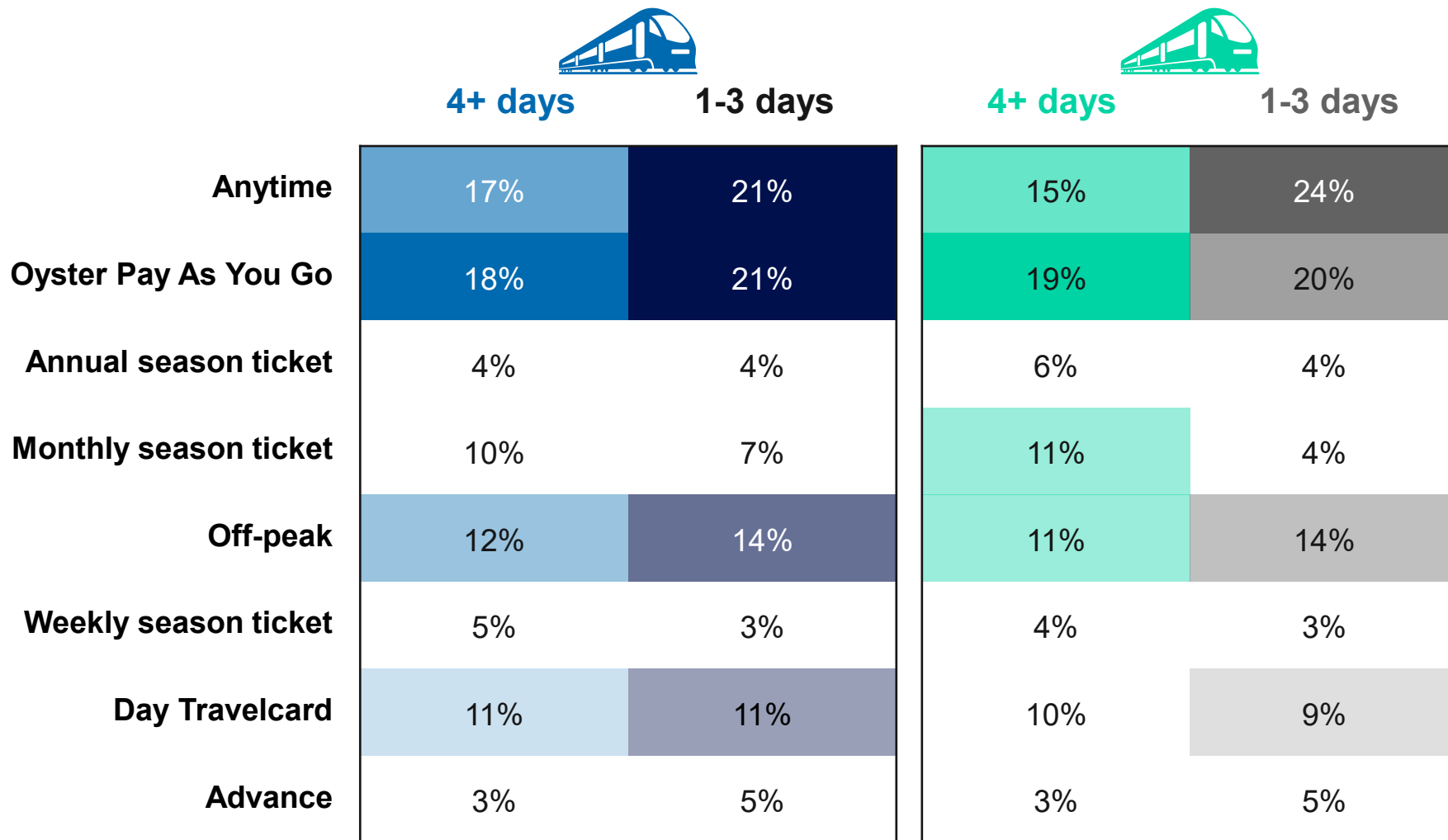
# Students do not expect to use season tickets either, many preferring off-peak tickets this year



Q. Which, if any, of the following types of rail ticket do you expect to mainly use for your commute?



# Expected ticket preferences remain similar between 2021 and 2022, regardless of commuting frequency



# Expected rail ticket purchasing reasons are similar to those pre-pandemic

Before lockdown	In 2021, after lockdown	In 2022, with no new lockdown
It saved me money in the long term	It would be cheaper than other rail tickets	It would be cheaper than other rail tickets
It was cheaper than other rail tickets	I could use it any time, and not be restricted to travelling at certain times	I could use it any time, and not be restricted to travelling at certain times
It gave me more flexibility	It would be easy to use	It would save me money in the long term
I could use it any time, and not be restricted to travelling at certain times	I plan to travel less often by rail during this period	It would be easy to use
I've always used this type of ticket	It would save me money in the long term	I plan to travel less often by rail during this period

# This chapter answers the following research questions:

- **What is the appetite for a new flexible part-time rail ticketing product?**
- **What are the characteristics of those who are interested?**
- **Would an e-ticket-only option hold back rail commuters from using the new flexible fares?**

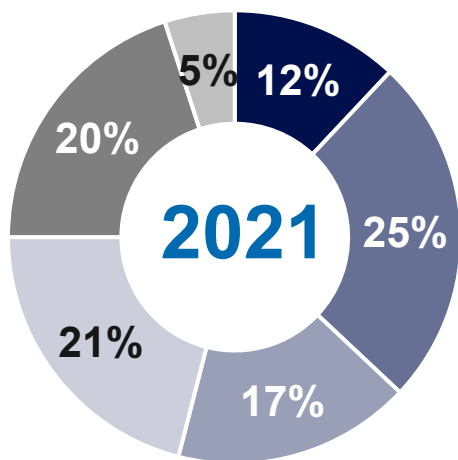
# What is the appetite for **new flexible** fares?

# More than a third are interested in the new flexible fares in future, but more are either not interested or will not travel by rail



Participants were shown the following description for the new flexible fares before being asked follow up questions:  
*Please imagine there are new flexible rail tickets which allow passengers to purchase bundles of 8 day passes for use in a 28-day period after purchase, offering a discount over buying peak-time day return tickets individually. They could be used on any day they are needed within that period, rather than on set days.*

Q. Based on this information, how interested, if at all, would you be in buying this flexible rail ticket?



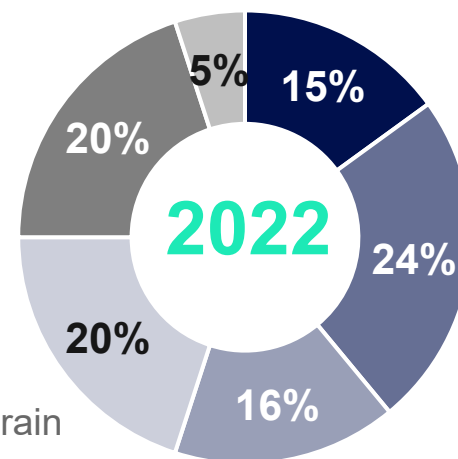
37%

38%

- Very interested
- Fairly interested
- Not very interested
- Not at all interest
- Wouldn't make a journey by train
- Don't know

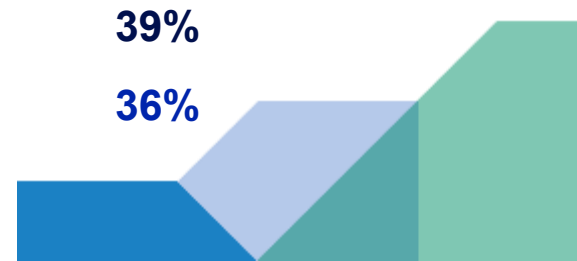
**Interested**

**Not interested**



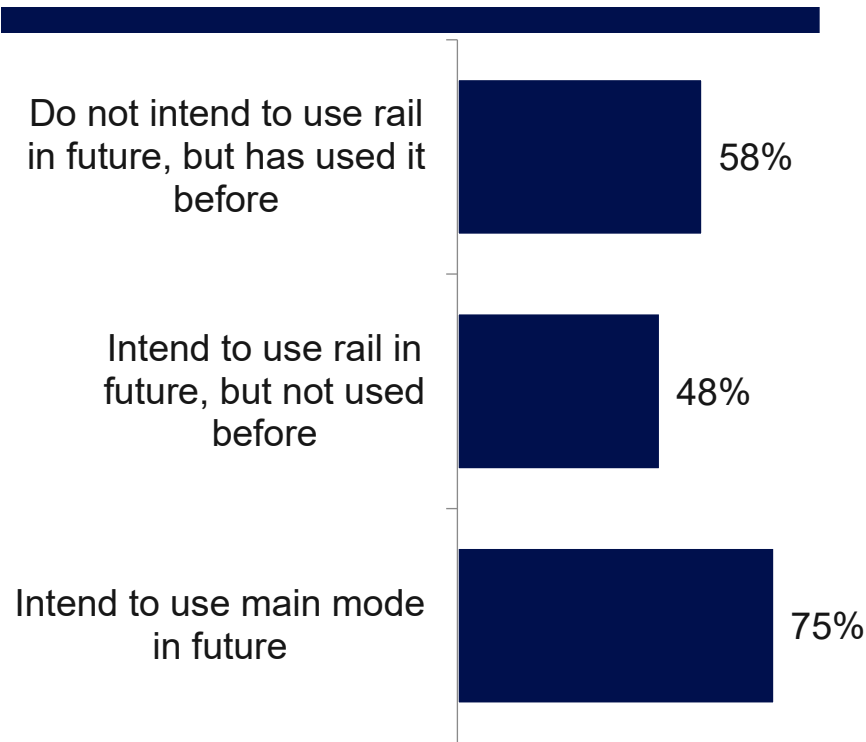
39%

36%

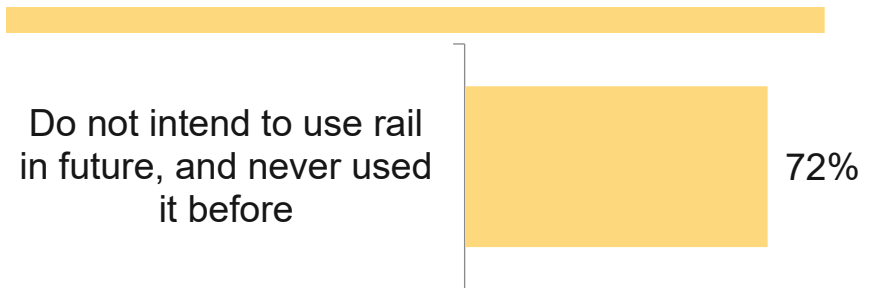


# Some previous rail users showed a greater interest in the new product, despite not expecting to use rail in future

## MORE LIKELY TO BE INTERESTED IN THE NEW FLEXIBLE FARES (AVERAGE 37%)



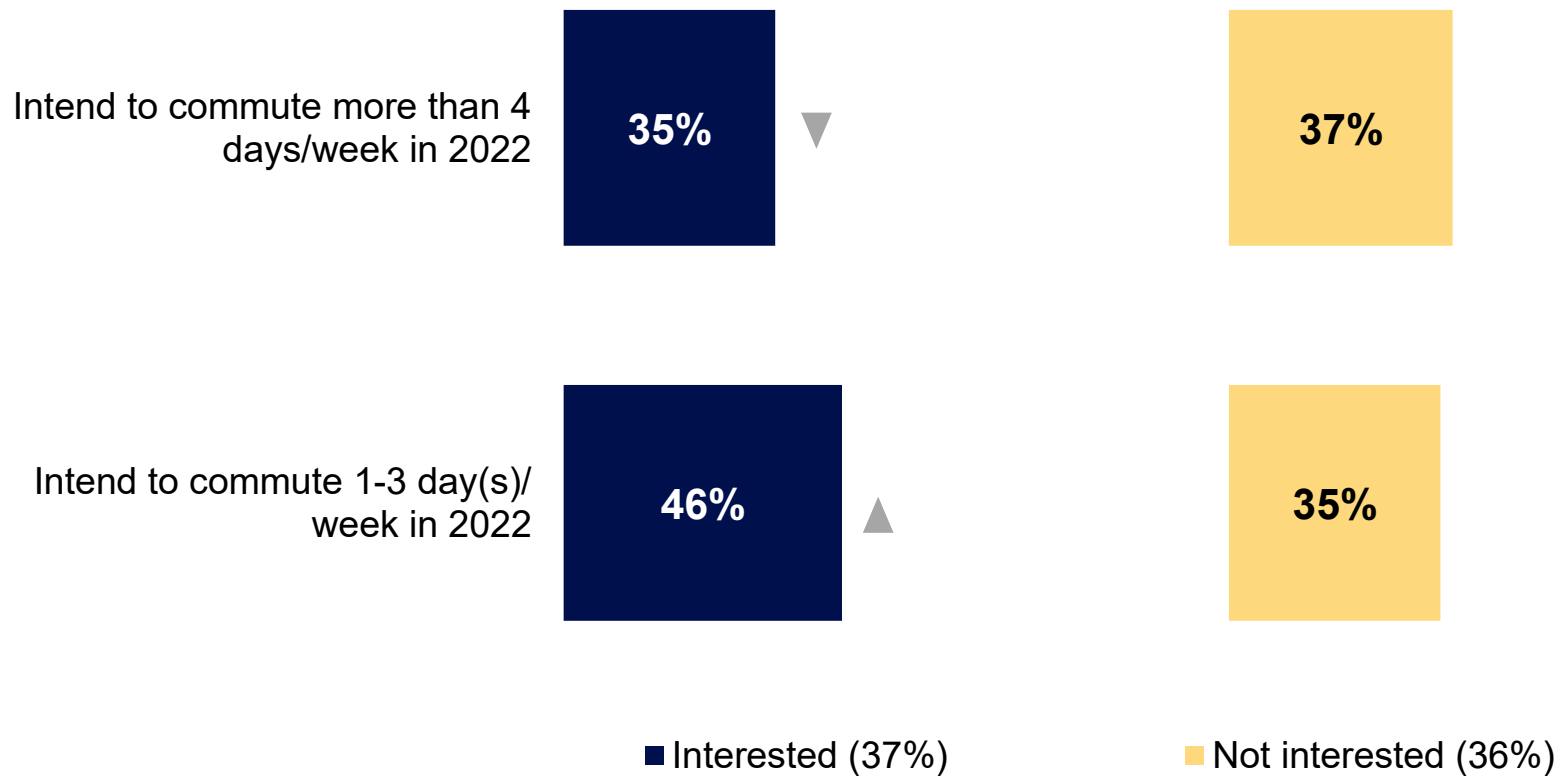
## NOT INTERESTED/WOULD NOT MAKE A JOURNEY BY TRAIN (AVERAGE 56%)



Source: Ipsos MORI/DfT

Base: All commuters (before, during, or after the pandemic) (6,939); who do not intend to use rail in 2022, but used before (125); intend to use rail, but not used before (585); intend to use rail as main mode (1,048); do not intend to use rail, and never used before (3,989). 2-14 April 2021

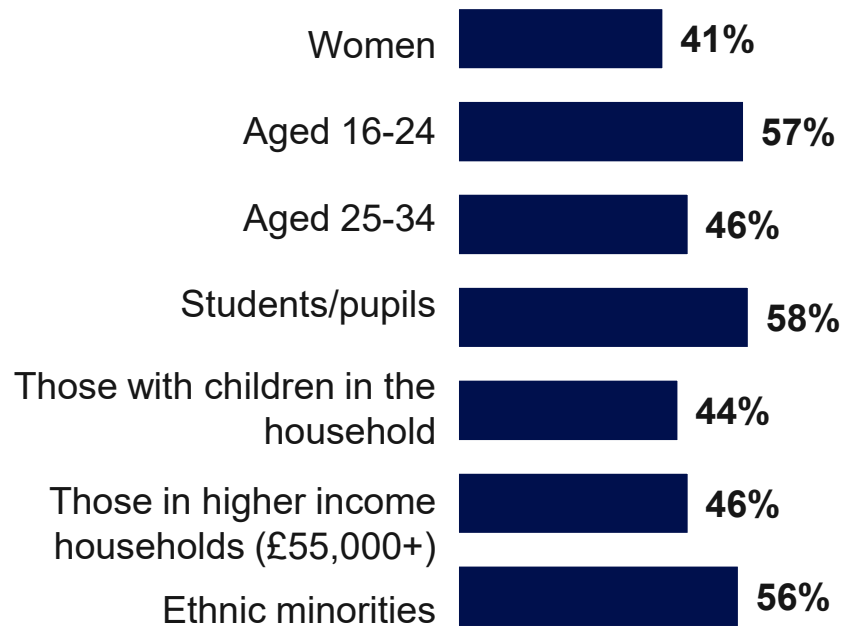
# Those who intend to commute part-time (once to three times/a week) also tend to be more interested in the proposition



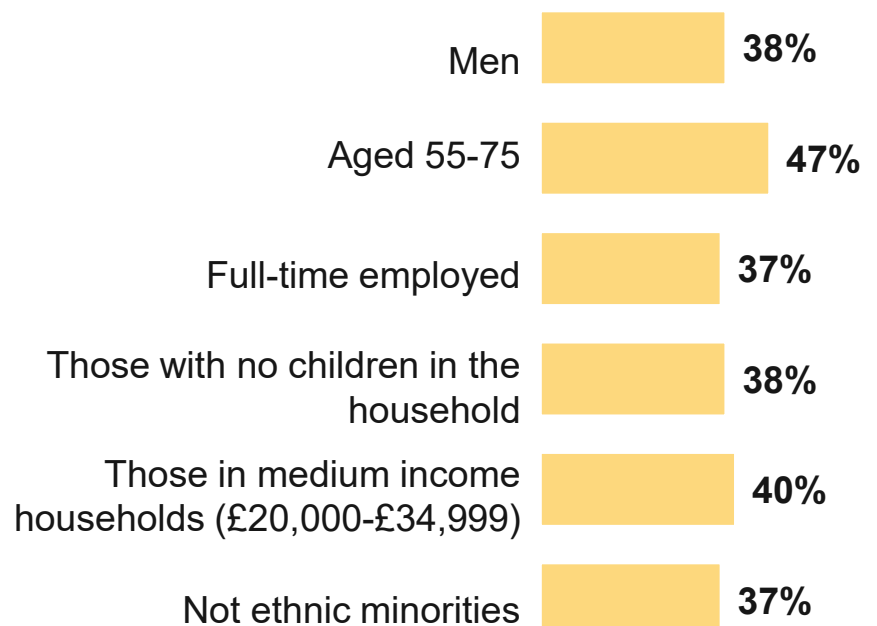


# Women, younger adults, students and those in higher income households among those who are most interested...

**GROUPS WHO ARE MORE LIKELY TO BE INTERESTED IN THE NEW FLEXIBLE FARES (AVERAGE 39%)**



**...AND MORE LIKELY TO NOT BE INTERESTED (AVERAGE 36%)**



Younger adults, those with children in the household and in higher income households are among those most likely to have had some flexibility in their working or commuting patterns before COVID-19

Source: Ipsos MORI/DfT

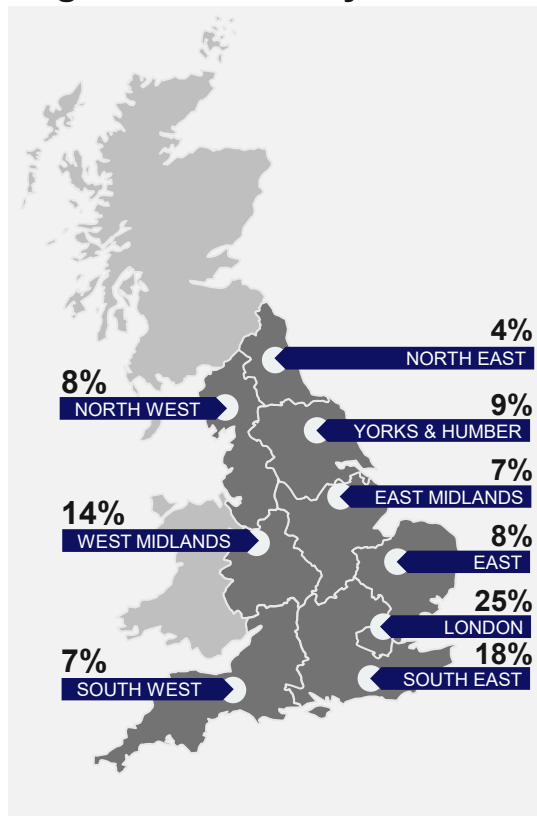
Base: Men (2,609); women (4,323); aged 16-24 (1,239), 25-34 (1,674); 55-75 (1,180); full-time employed (4,925); students/pupils (556); with children in the household (2,648) or not (4,291); in medium income households (£20,000-£34,999) (1,473); or higher income (£55,000+) (1,961); ethnic minorities (1,048); not ethnic minorities (5,797). 2-14 April 2021

# Looking at the 'cohort' of potential flexible ticket buyers, most are younger and work full-time...

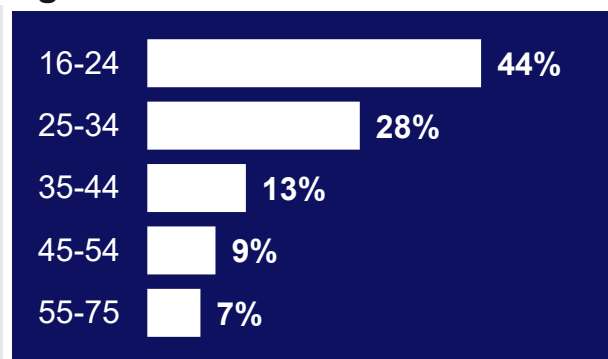


Demographic profile of the 39% who say they are interested in flexible rail ticket in 2022 (n=2,836)

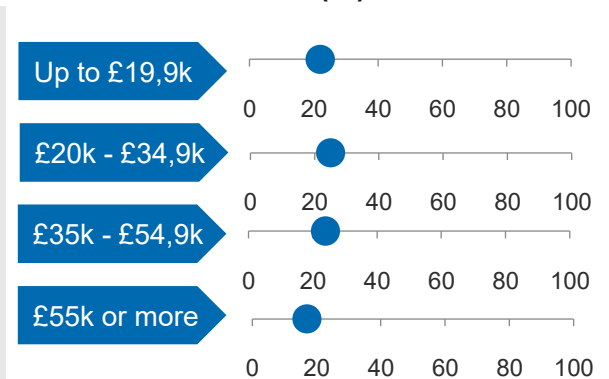
## Region of residency



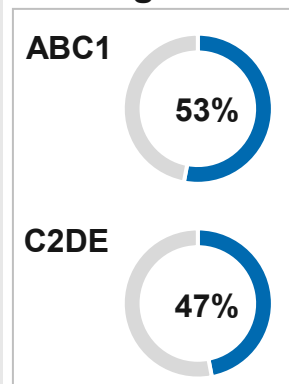
## Age



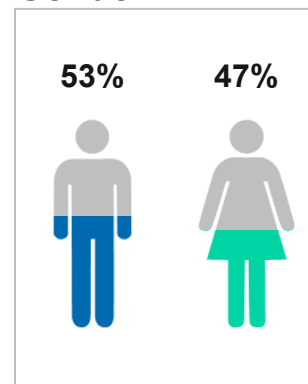
## Household income (%)



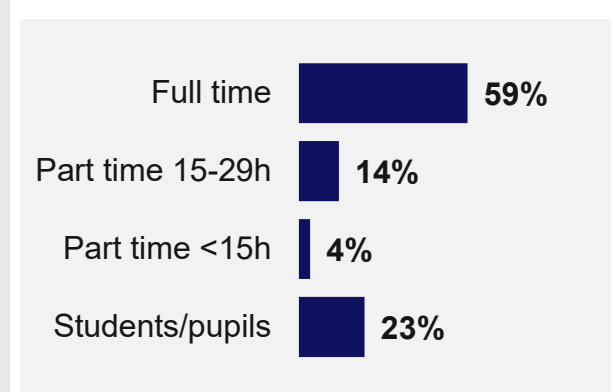
## Social grade



## Gender



## Work status



# ...and around half this cohort expect to be able to work flexibly, including commuting off-peak



## Expected frequency of commute in 2022



## Future flexible working (% likely to do in 2022)

Work from home *all* of the time



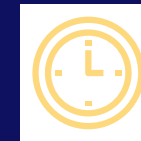
**35%**

Work from home *some* of the time



**52%**

Start/finish during *peak* hours



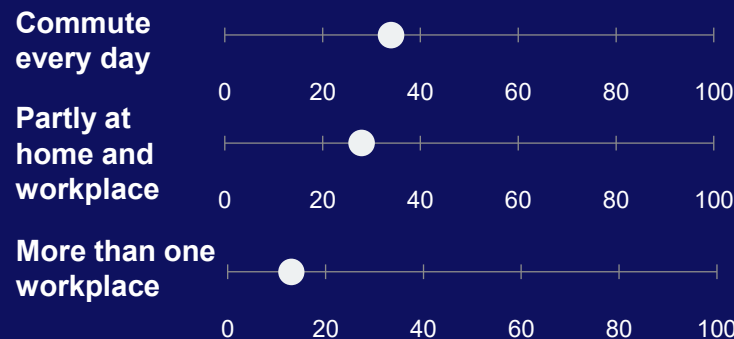
**47%**

Commute during *off-peak* hours

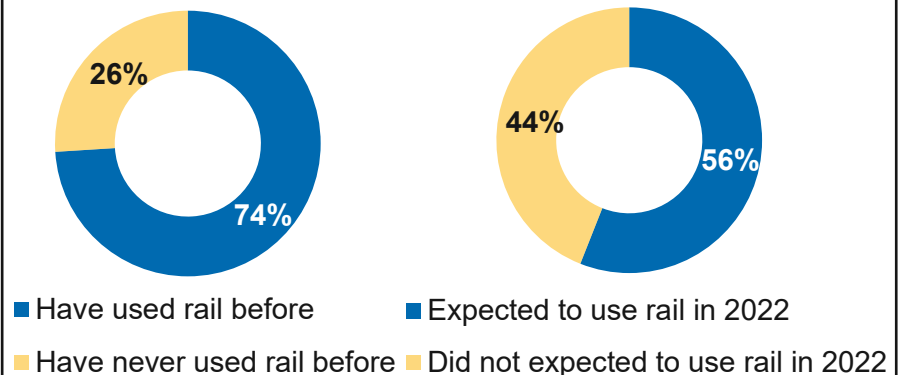


**47%**

## Expected working patterns in 2022



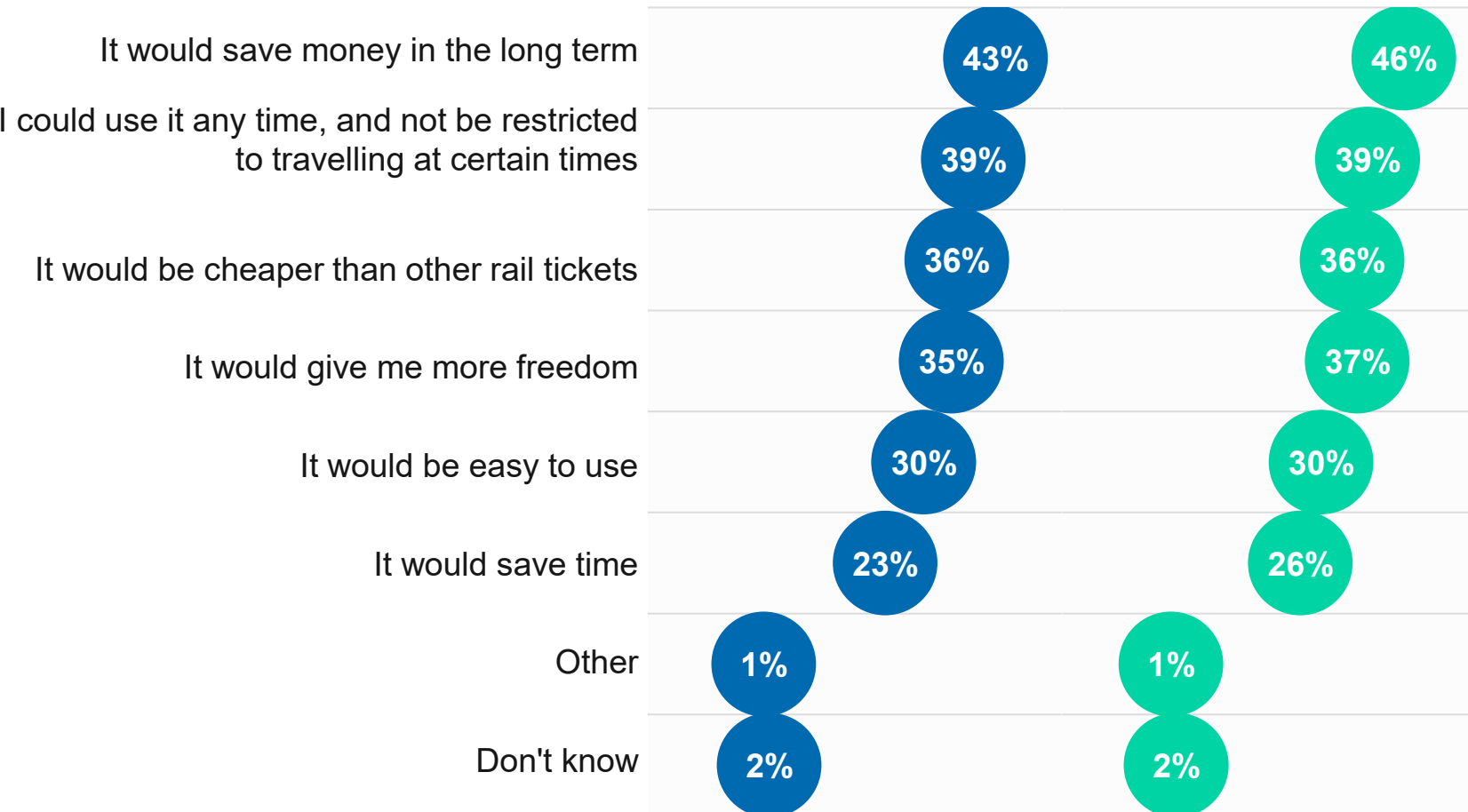
## Rail use



# The reasons for being interested are broadly similar in the short and medium term



Q. You said you would be interested in buying a new flexible ticket this year/next year. Which of these, if any, are your reasons? *[Multiple answers permitted]*

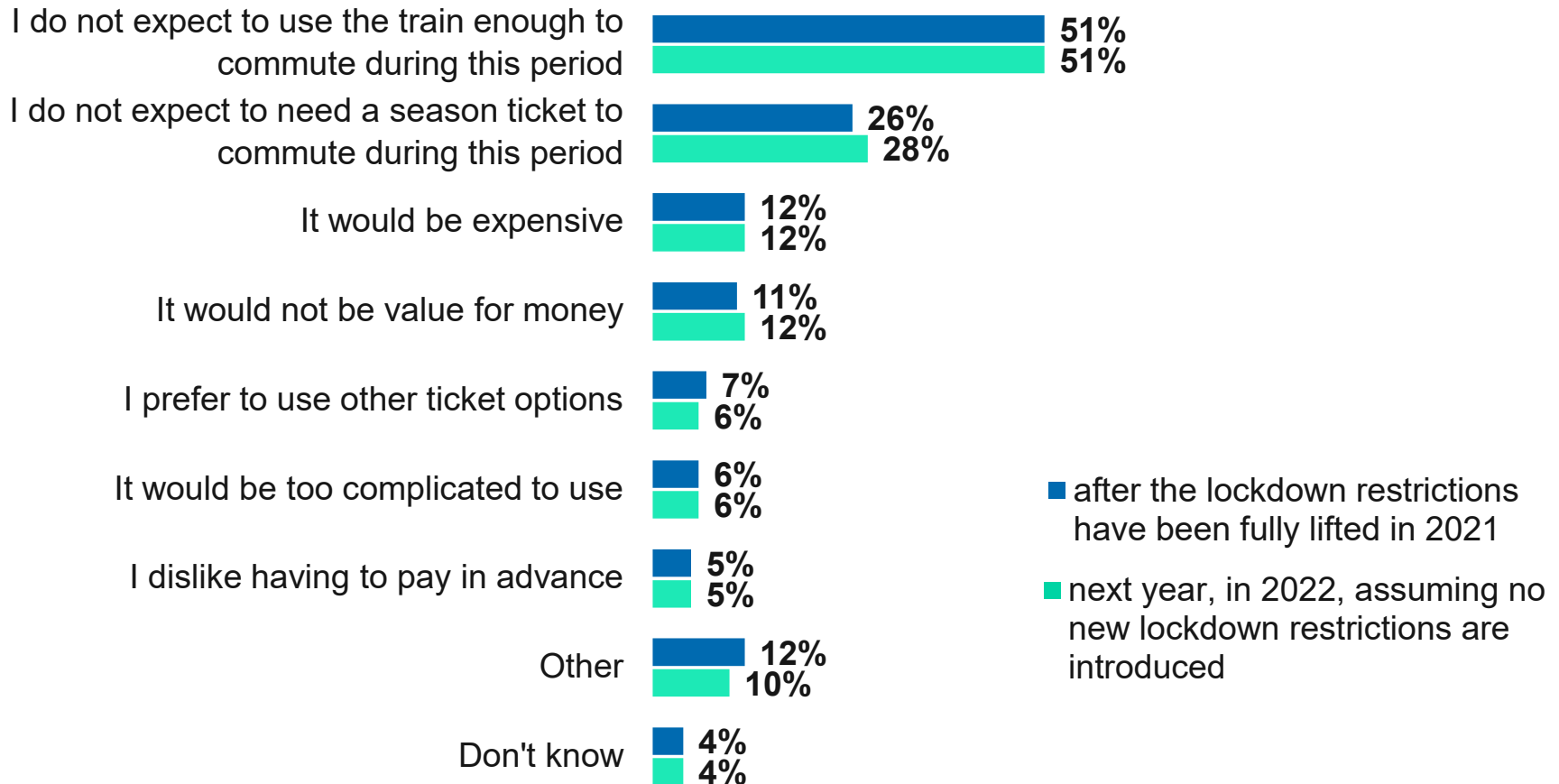


2021  
2022

# ...as are the reasons for *not* being interested, which mainly relate to not needing to use rail



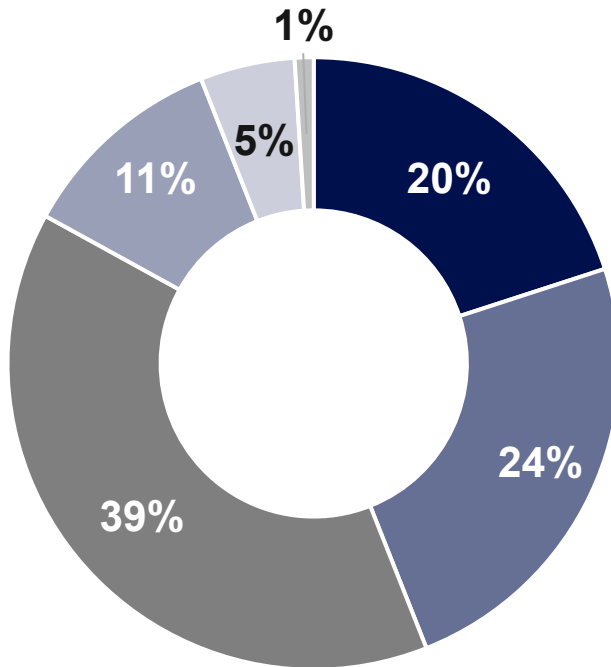
Q. You said you would not be interested in buying a new flexible ticket this year/next year. Which of these, if any, are your reasons? [Multiple answers permitted]



# A digital-only option appears to be a safe one – few are put off by this\*



Q. Let's imagine that the new flexible ticket described earlier would only be available electronically, using either a smartcard or a barcode downloaded to your smartphone/ other electronic device. Would you be more or less likely to buy the new flexible ticket because of this, or would it make no difference?



- Much more likely
- A little more likely
- Would make no difference
- A little less likely
- Much less likely
- Don't know

**\*Noting that the survey was conducted online**

**44%**

**16%**

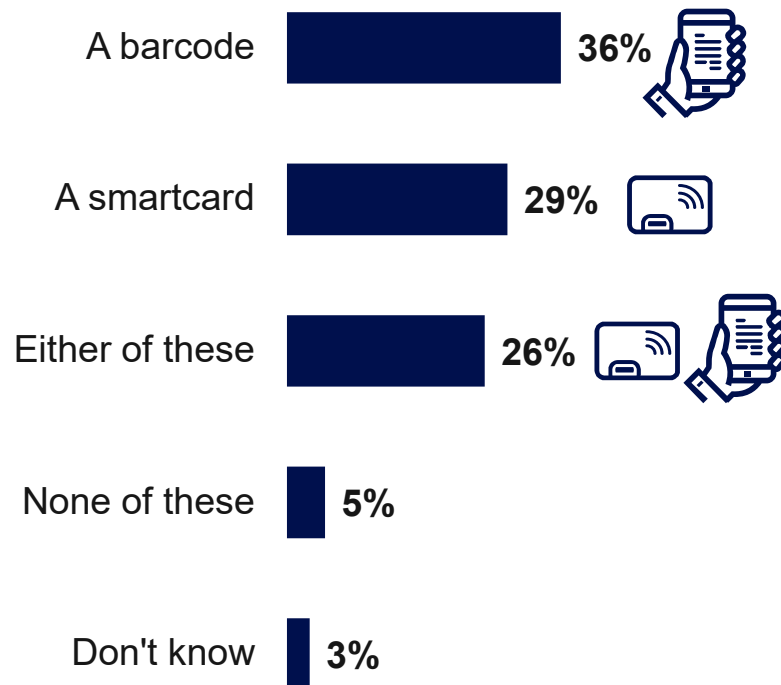
**More likely**

**Less likely**

# Both smartcards and barcodes are well received as options for the new flexi fares...



Q. And how would you prefer to receive the new flexible ticket...? Would you prefer it through...?



- More likely to prefer a **barcode**:
- Aged 16-24 (43%)
  - North East residents (53%)
  - Yorkshire residents (44%)
  - East Midlands residents (47%)
  - Higher income households (£55,000 or more) (35%)

- More likely to prefer a **smartcard**:
- Aged 55-75 (40%)
  - Full-time employed (32%)
  - East Anglia residents (35%)
  - Greater London residents (37%)

- More likely to prefer **either**:
- Aged 25-34 (32%)

- More likely to *not* prefer **none of these**:
- Aged 16-24 (7%)
  - Aged 55-75 (10%)
  - Part-time employed (7%)
  - Lower income households (up to £19,999) (10%)

# ...mirroring previous purchasing habits



## Past rail commuters

Q. Where have you most commonly bought your tickets when travelling by train for commuting purposes?

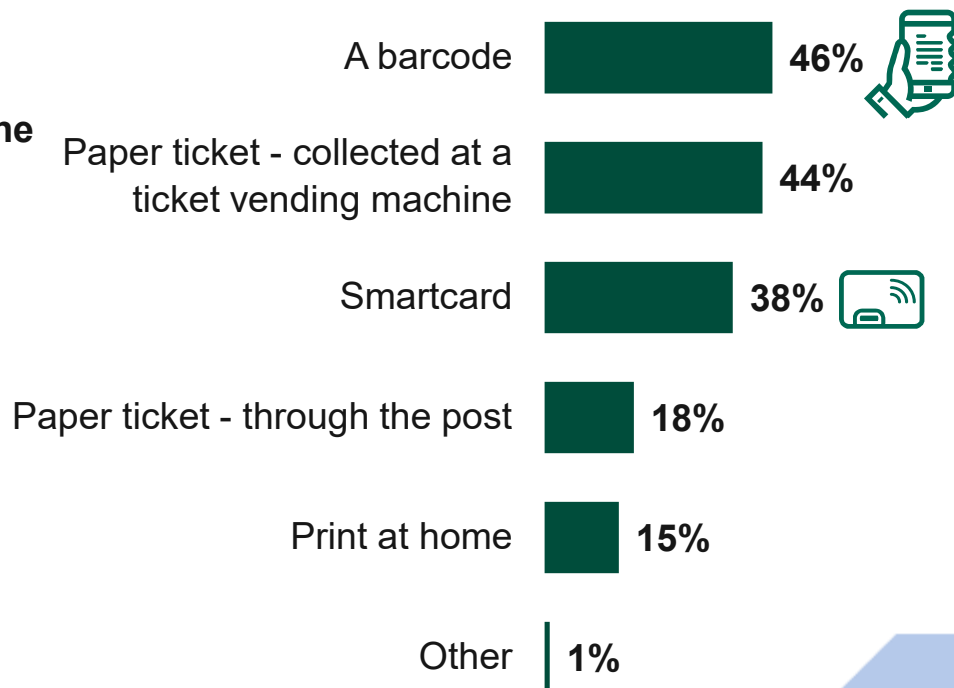


of rail commuters buy their tickets online, which they have received as:



## Past rail commuters who buy tickets online

Q. And which of the following ways, if any, have you ever received your tickets when buying them online? [*Multiple answers permitted*]

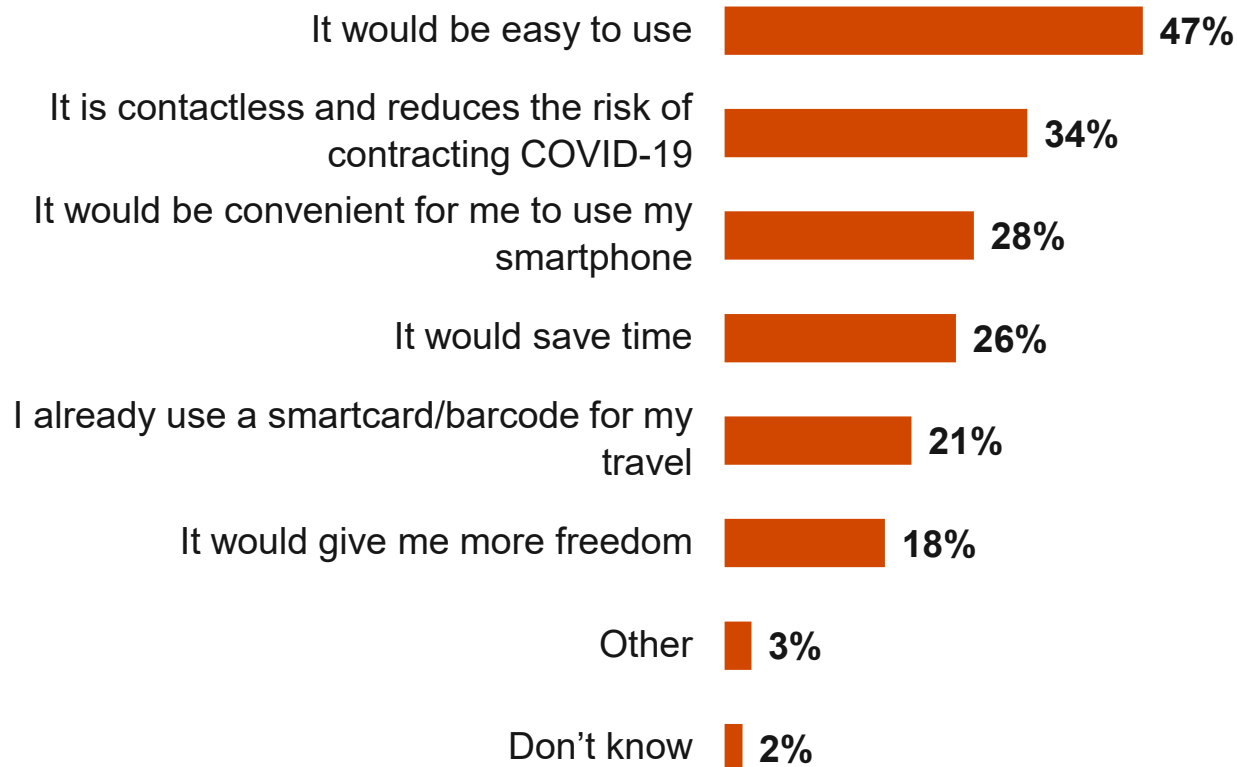




# Comfort, COVID-19 safety and convenience: most common incentives for using the new flexi-ticket as a *smartcard*...



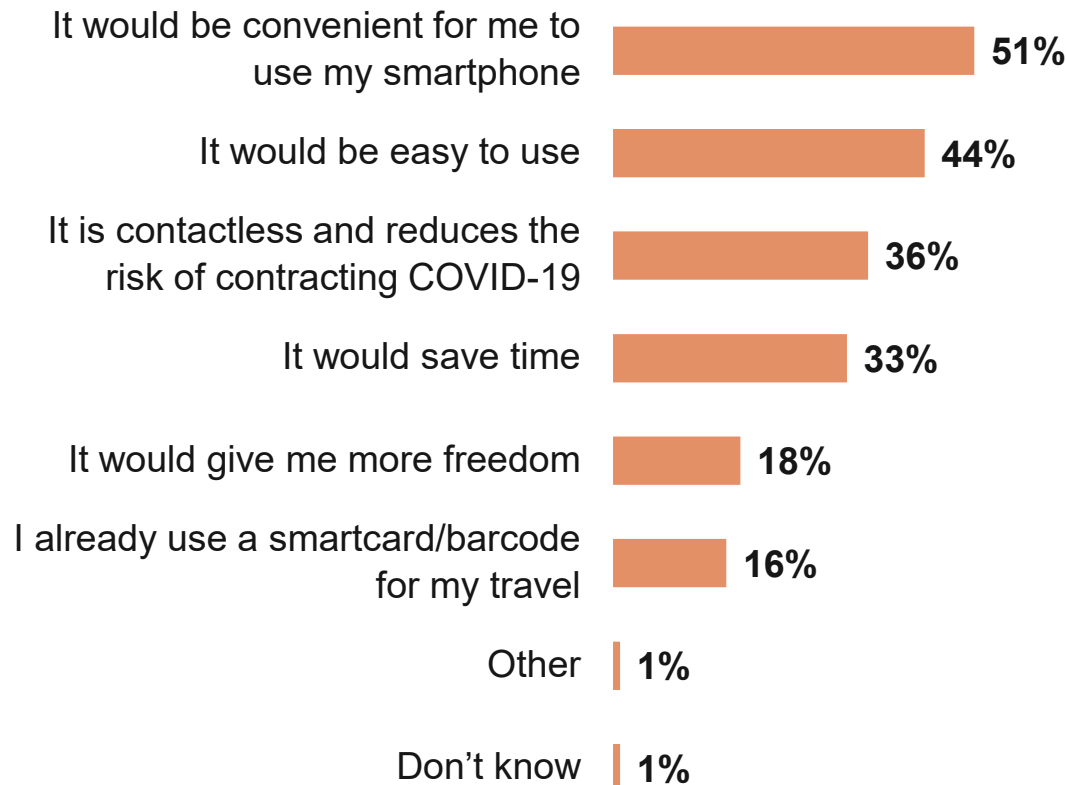
Q. You said you would prefer to receive the new flexible ticket as a smartcard / either a smartcard or a barcode downloaded to your smartphone/other electronic device. What makes you say that? [Multiple answers permitted]



# ...while convenience is the most common reason for using the new proposition as a *barcode*



Q. You said you would prefer to receive the new flexible ticket as a barcode / either a smartcard or a barcode downloaded to your smartphone/other electronic device. What makes you say that? [Multiple answers permitted]



# Summary: what do survey findings say about levels of interest in the new product?

## Evidence of **stronger** sentiment

- Close to three quarters (74%) of those interested in the proposition **have used rail before**.
- Among **future commuters who expect rail to be their main mode of travel**, 75% say they are interested in the product.
- Two-thirds of those interested in the ticket say they would use it for **work-related reasons**.
- Among those interested, **both smartcards and barcodes are well received as options** for the new ticket, and many have used these tickets before.

## Evidence of **weaker** sentiment

- In 2021, future commuters are **twice as likely to say they're fairly interested than very interested** (25% vs. 12%). However, that gap narrows slightly into 2022 among this group (24% vs. 15%).
- Around one third (34%) of those interested in the ticket say they **expect to commute every day in 2022**, a pattern which would not be conducive to the new product.
- One quarter (26%) of those interested did not use rail to commute before the pandemic, while **44% had said earlier in the survey they did not anticipate using rail to commute in 2022**.

# **This chapter answers the following research questions:**

- **What are the expected working and commuting patterns of part-time workers after the pandemic, once restrictions are fully lifted? How likely are part-time workers to be able to work flexibly?**
- **How do these compare with before or during the pandemic?**
- **What proportion of part-time workers intend to use rail to commute, and how many of them used rail before?**
- **What rail tickets do part-time workers intend to use after the pandemic? How does that compare with before/ during lockdown?**
- **Is there an appetite for a new flexible season ticket?**

# What do **part-time workers** expect to do in **2022**?

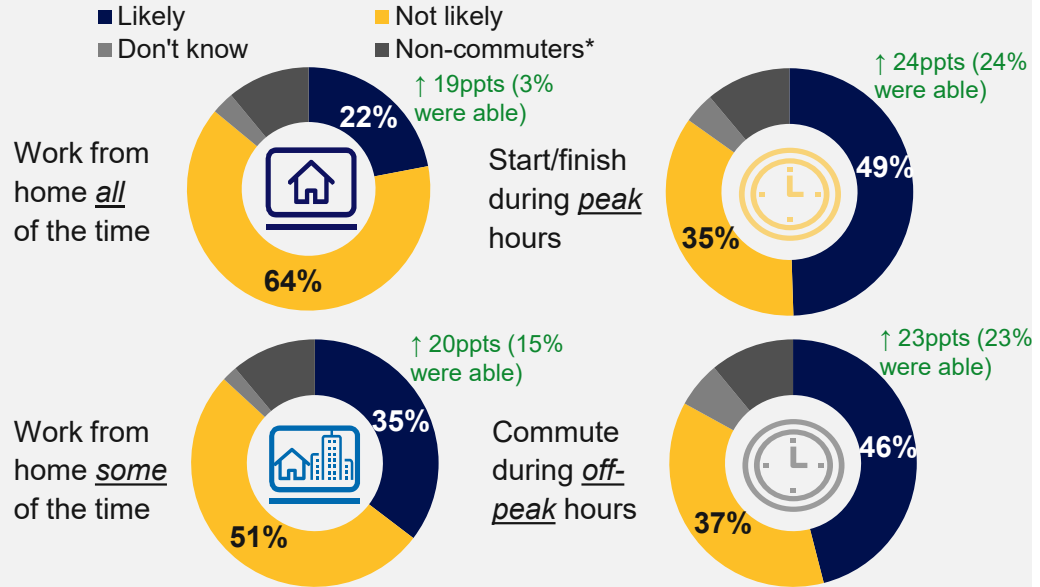
# Part-time workers are more likely to expect to start/finish work during peak hours or commute off-peak than work from home in 2022

Expected working and commuting patterns of those currently working part-time (n=1,540)

## Expected frequency of commute in 2022



## Future flexible working (% expect to do in 2022)

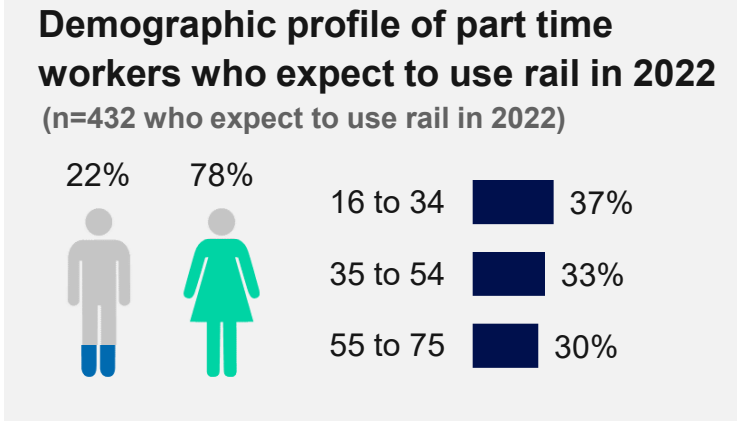
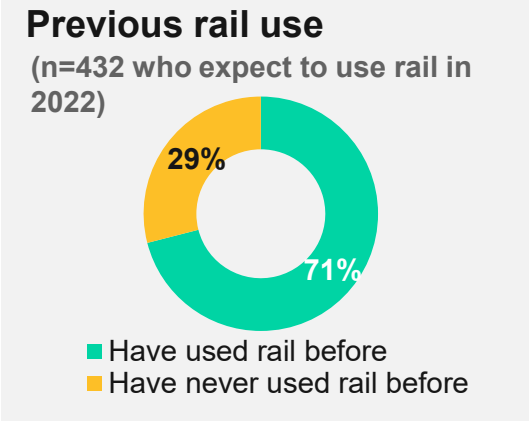
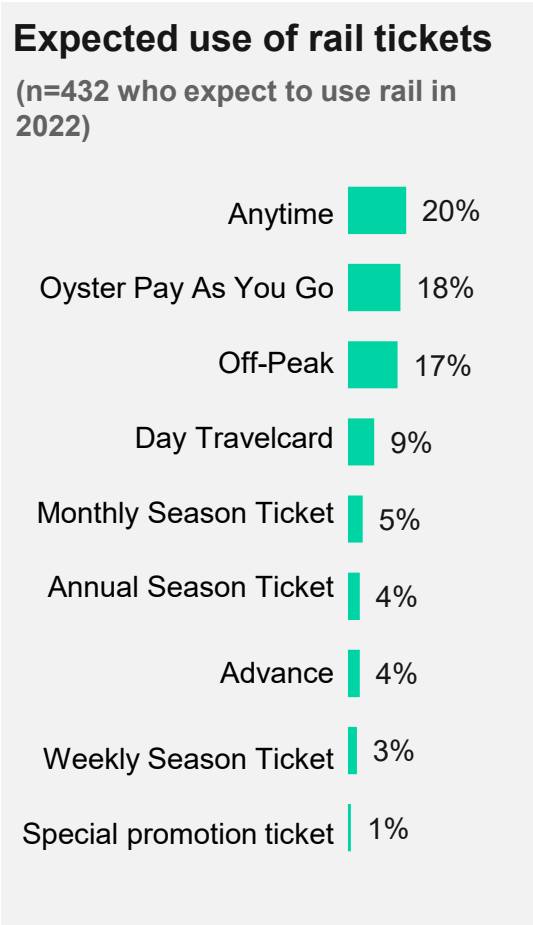
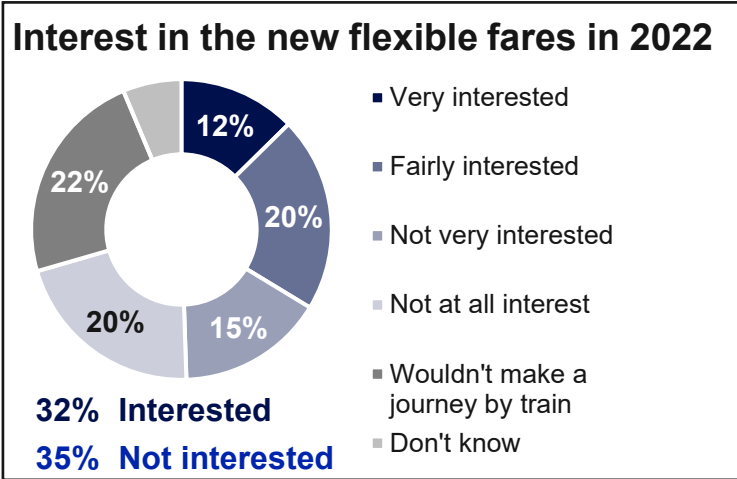
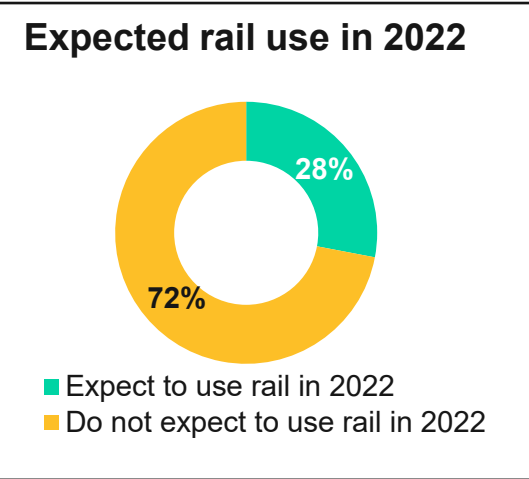


## Future commuting pattern (% expect to do in 2022)

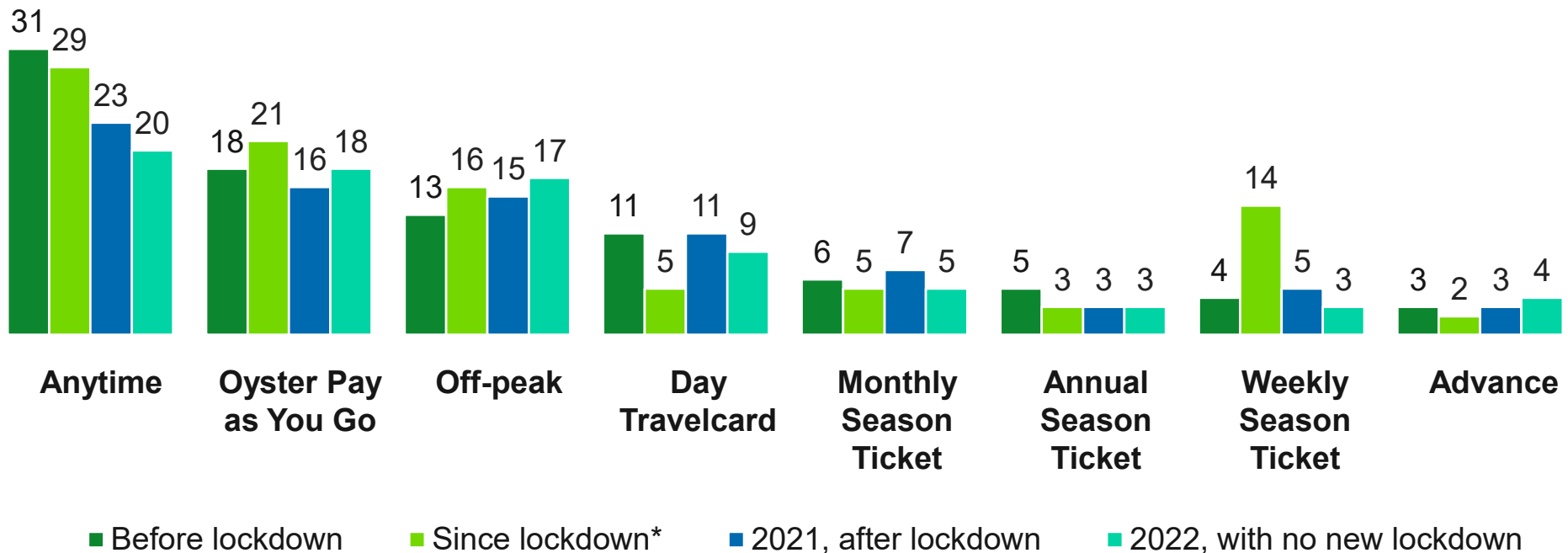


# Over a quarter of part-time workers expect to use rail in 2022 and around a third are interested in the new flexible fares

## Expected rail use, ticket purchasing and interest in flexible fares in 2022



# Expected rail ticket purchasing patterns among part-time workers look more similar to patterns before the pandemic than full-time workers



\*Noting that the base size for since the lockdown is very small so results here are indicative only





Department  
for Transport

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