

TRAVEL DEMAND MANAGEMENT

# Office Return Survey

May 2021



EVERY JOURNEY MATTERS

# Methodology

## Sample size

A non-scientific sample of business respondents reached through existing engagement channels with GLA, BIDS, boroughs, property management companies (including Savills and Knight Frank) and other stakeholders.



Between these 110 responses were achieved.

The sample is not representative of offices in London and findings should be used indicatively with caution.

Sectors included Financial and Insurance (30% of responses), Professional, Scientific and Technical activities (19%) and Real Estate (19%).

## Fieldwork

Online survey ran continuously from 11 May July to 18 May 2021.

The median completion time was 5 minutes.



## Limitations

There were no restrictions to accessing the survey and we have no way to monitor any double counting that may have occurred.



## Headlines and next steps

- Respondents expect a gradual return to the office across a few months once Step 4 is implemented, with 84% of respondents expecting about half or more employees to have returned by the end of September 2021.
- However, changing working patterns are likely to impact on weekday peak demand – with 60% of respondents expecting to implement a hybrid working model, allowing employees to combine onsite and offsite working. Three quarters (74%) of respondents expect home working to increase in the longer term.
- Concern over catching coronavirus when travelling on public transport is identified by 73% of respondents as a main barrier employees are facing with the return to offices – the reassurance we are providing customers continues to be necessary.
- Most respondents expect employers to decide which days employees will work in the office and the majority of respondents are open to encouraging employee travel at quieter times and using active travel. We will continue to engage and tailor engagement with office sectors to influence the influencers.
- Key themes from respondents on how TfL can help during the recovery are around flexible ticketing, service levels and enforcement of face coverings



## Executive summary: What's consistent\* ?

### Continued expectation for increased working from home

- Three quarters (74%) of respondents expect their business to adopt more days spent working from home compared to before the coronavirus pandemic. In July 2020 we found that 86% of respondents expected their business to adopt or maintain more days spent working from home in the longer term.

### Service levels and face covering compliance remain important

- Respondents cited services levels and enforcement of face coverings as key ways that TfL could support them and their business in coming months.

### Breakdown of survey sample by sector, size and location

- Similar profile of respondents to survey undertaken in July last year, with 33 Financial and Insurance, 21 Real Estate and 20 Professional, Scientific and Technical.
- Most (61) respondents were from businesses with less than 50 employees. 16 had 50-99 and 15 had 1000+ employees.
- Again there was a central London focus – 76 respondents had offices in central London, 24 in inner London and 26 in outer London.

*\* Compared to July 2020 TfL business survey using the same methodology and achieving 336 responses*



## Executive summary: What's changed\* ?

### Plans for returning to the office have developed

- This survey suggests respondents are more likely than last summer to have fully prepared plans for employees to return to the office, with two thirds of respondents (68%) saying that their plans for employees to return to the office beyond Step 4 of the Government Roadmap (not before 21 June) are fully planned but flexible.
- In May 2020, around half of respondents (48%) said they had started but not completed their plans for employees to return to the office.

### Fewer respondents expect to implement working from home policies

- A smaller proportion 49% of respondents expect to implement a policy of increased working from home and 35% expect to implement staggered start/finish times to avoid the busiest travel times
- In July 2020, most respondents expected to implement increased working from home (72%) and staggered times to avoid the busiest travel times (65%) and about half expected a staggered return to office working on a department basis (48%) and an on-going working pattern alternating 'A' and 'B' teams across the business (48%)
- A smaller proportion of respondents expect there to be less business travel generally, and more walking and cycling to work than in July 2020 – though these were still cited by 44% and 30% respectively, compared to 63% and 53% in July 2020

*\* Compared to July 2020 TfL business survey using the same methodology and achieving 336 responses*



# Executive summary: What's New\* ?

## Staff engagement

- A third of respondents (30%) expect the employer to decide which days employees return to the office based on resourcing requirements, less than a quarter (22%) of respondents said that employees will decide for themselves which days to return.
- Two thirds of respondents (65%) say their staff have been surveyed or engaged to understand barriers they may face returning to the office.

## Barriers to returning to the office

- Concern of catching the coronavirus travelling to or from work by public transport is the most cited barrier from respondents for employees to return to the office (73%) followed by an increased preference to work from home generally (55%).
- Around a third of respondents cited concern of catching the coronavirus at work and childcare or other caring responsibilities, as a main employee barrier to working at their office location, at 34% and 33% respectively. These barriers were consistent between respondents that said they had engaged/surveyed employees, and those that had not.

## Speed of return

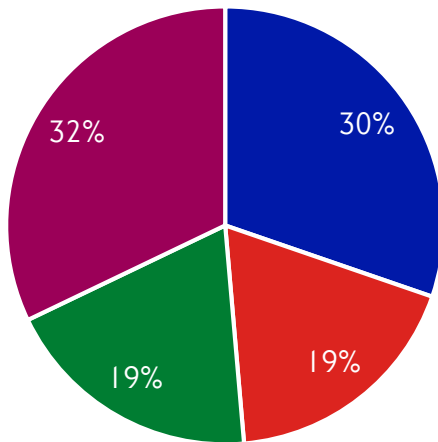
- Most respondents (60%) expect a hybrid working model, allowing employees to combine onsite and offsite work to be implemented.
- As of the end of May, a quarter (24%) of respondents say that about half or more employees had returned to the office and over a third (36%) say that hardly any had returned.
- By the end of June, 55% of respondents expect about half or more employees to have returned – 67% by the end of July, 74% by the end of August and 84% by the end of September. Just one respondent said they expected no employees to return by the start of 2022.

*\* Compared to July 2020 TfL business survey using the same methodology and achieving 336 responses*



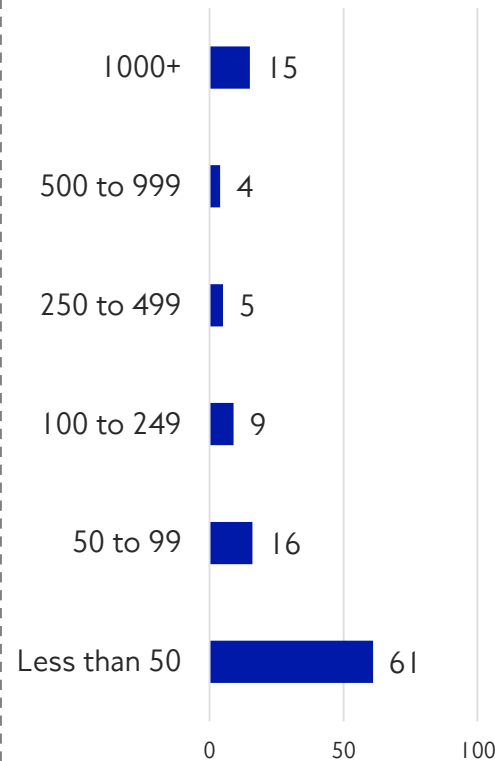
## Breakdown of survey sample by sector, size and location

### Sector

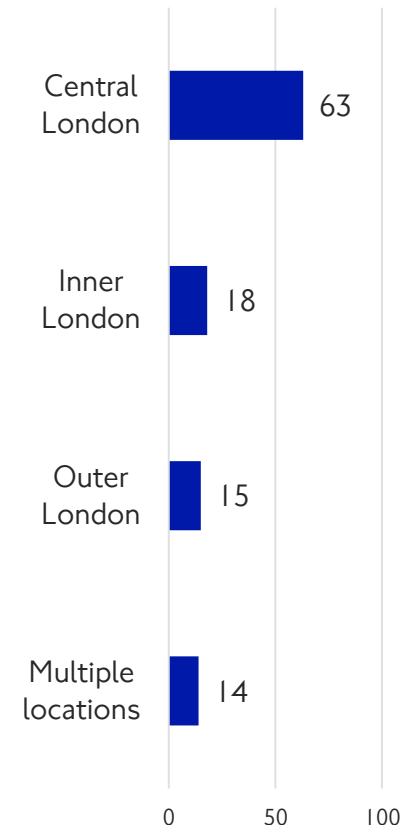


- Financial and insurance
- Professional, scientific and technical activities
- Real estate
- Other

### Size

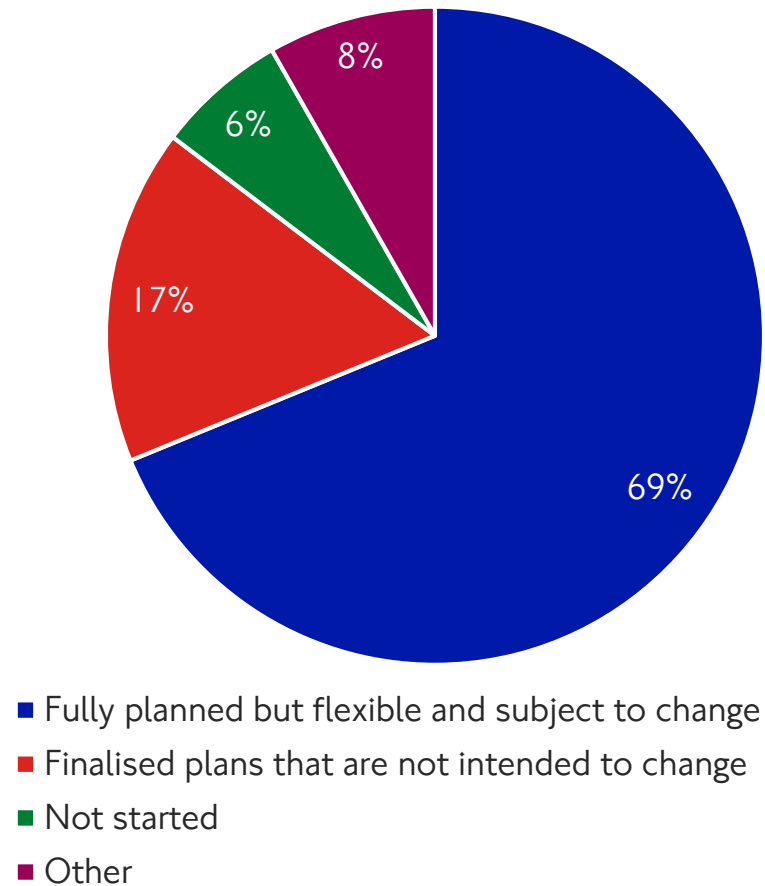


### Location



## Two thirds (69%) of respondents have fully planned for employees to return to the office beyond Step 4 but these plans are flexible and subject to change

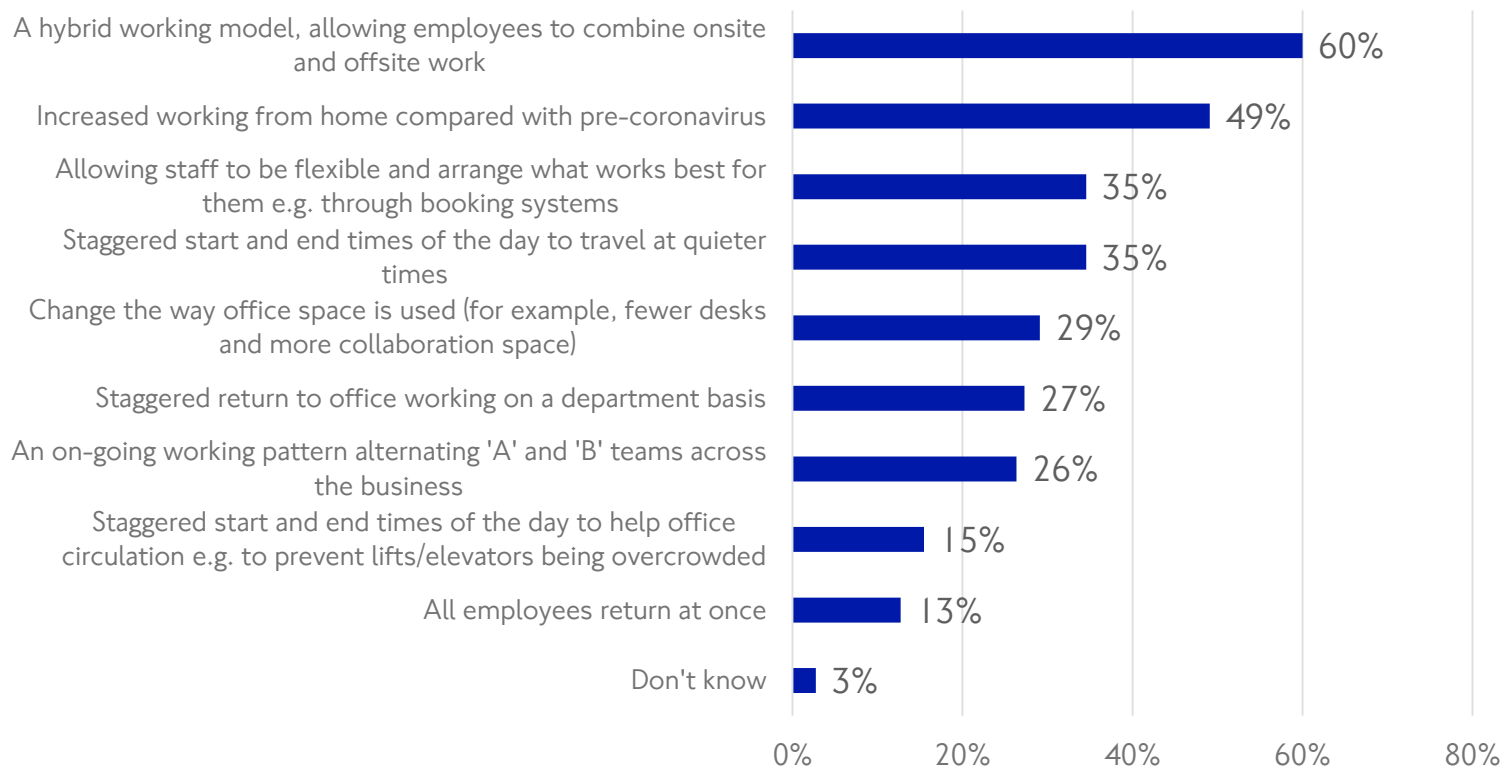
Just 6% of respondents have not started planning





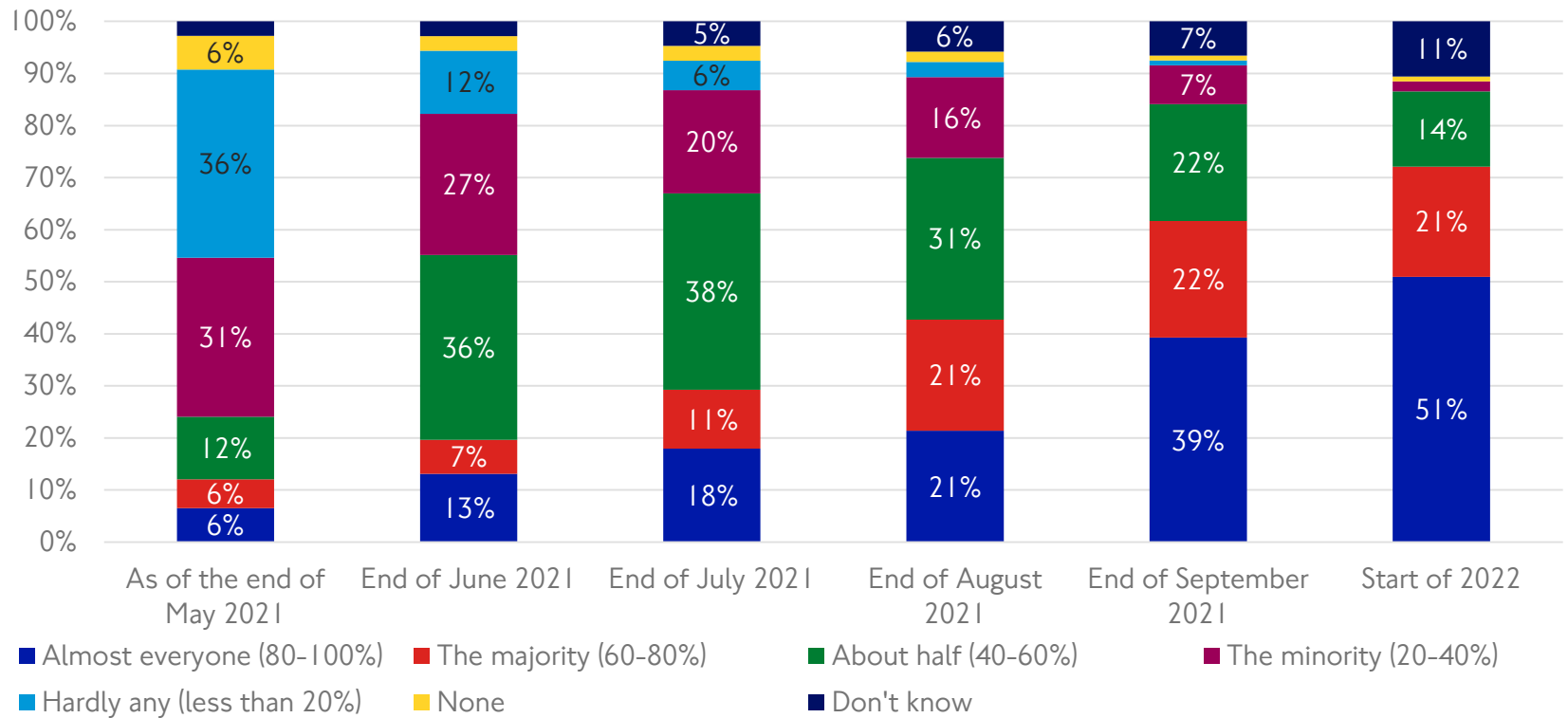
## Most respondents (60%) expect to be implementing a hybrid working model, allowing employees to combine onsite and offsite working

Around half (49%) of respondents are likely to implement increased working from home, and around a third are likely to allow staff to work flexibly and stagger start and finish times to travel at quieter times



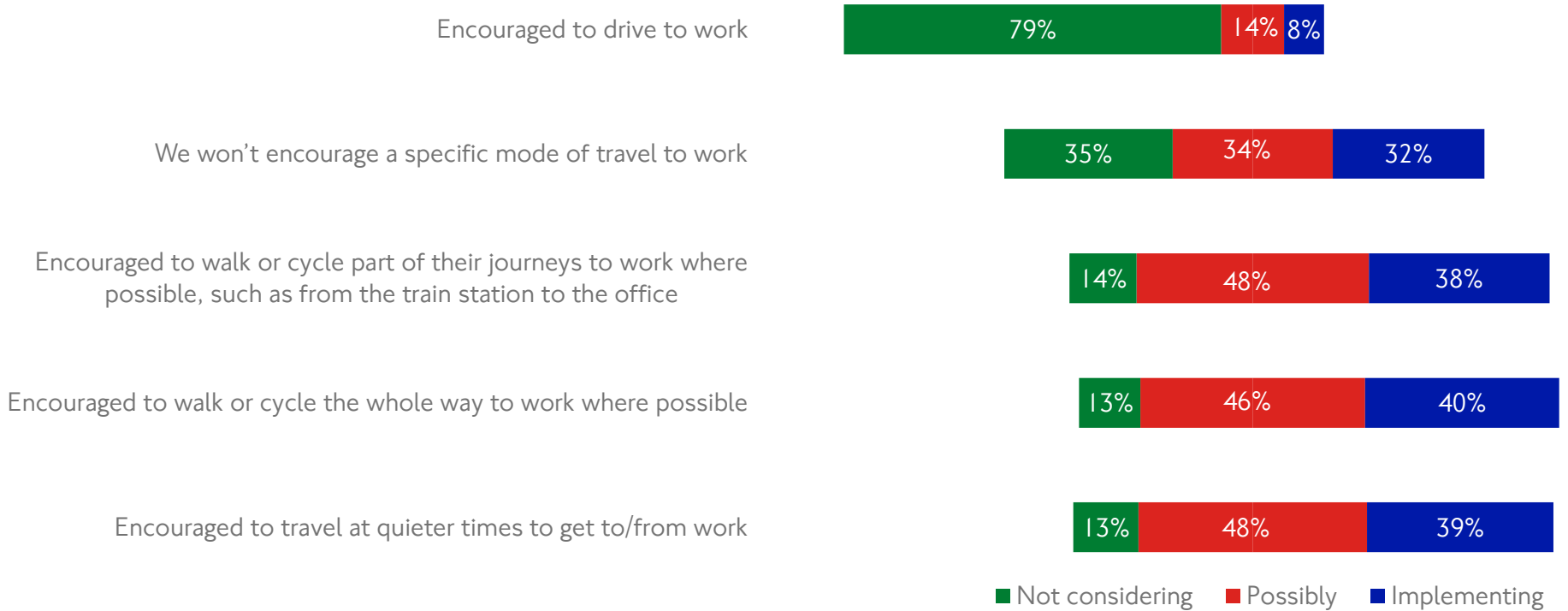
## As of the end of May, a quarter (24%) of respondents say that about half or more employees had returned to the office and over a third (36%) say that hardly any had returned

By the end of June, 55% of respondents expect about half or more employees to have returned – 67% by the end of July, 74% by the end of August and 84% by the end of September. Just one respondent said they expected no employees to return by the start of 2022



# 40% of respondents plan to encourage employees to walk or cycle the whole way to work where possible, 39% plan encourage employees to travel in quieter times and 38% plan to encourage employees to walk or cycle part of their journeys

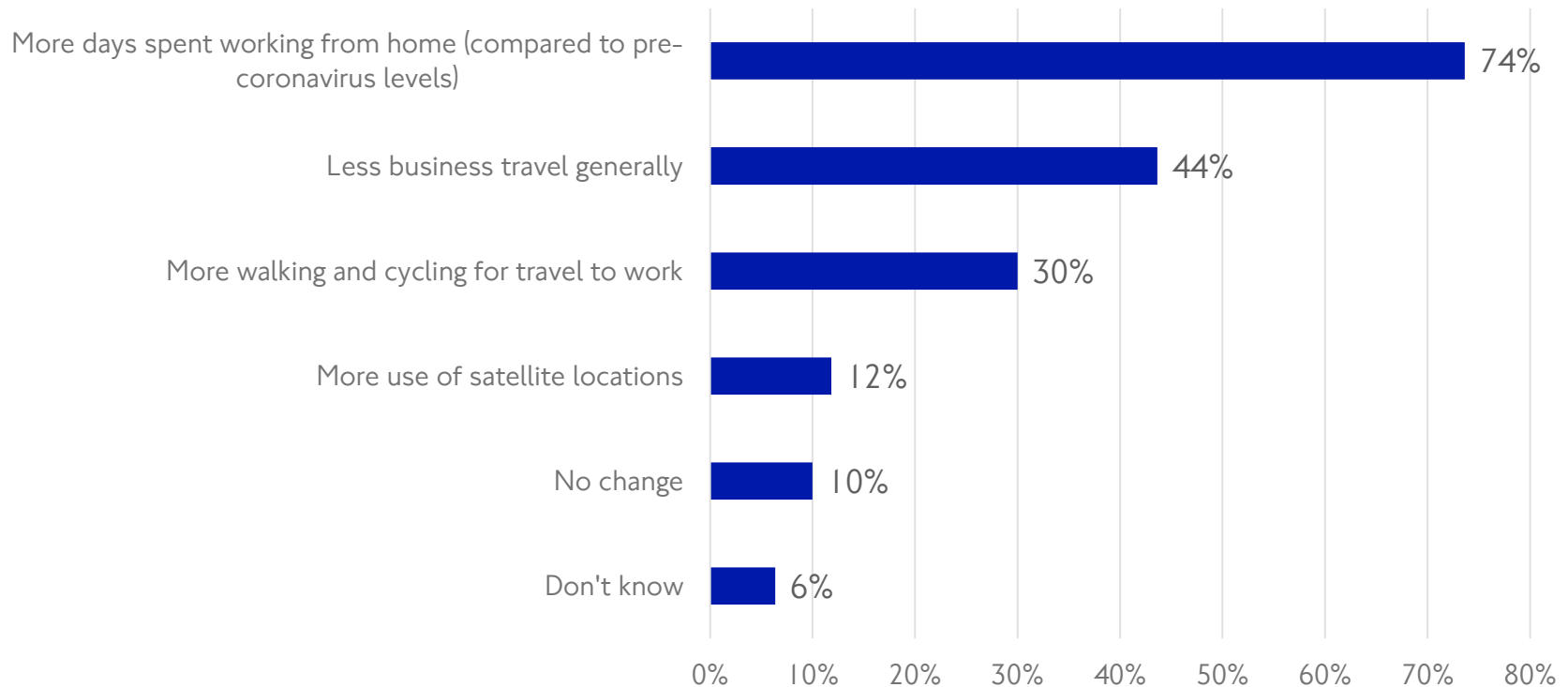
Only a small number of respondents plan to encourage driving to work as part of their policy for returning to work



Q7. Will you be encouraging employees to do any of the following policies? We won't encourage a specific mode of travel to work n=94. Encouraged to travel at quieter times to get to/from work n=109. Encouraged to walk or cycle the whole way to work where possible n=107. Encouraged to walk or cycle part of their journeys to work where possible, such as from the train station to the office n=105. Encouraged to drive to work n=103

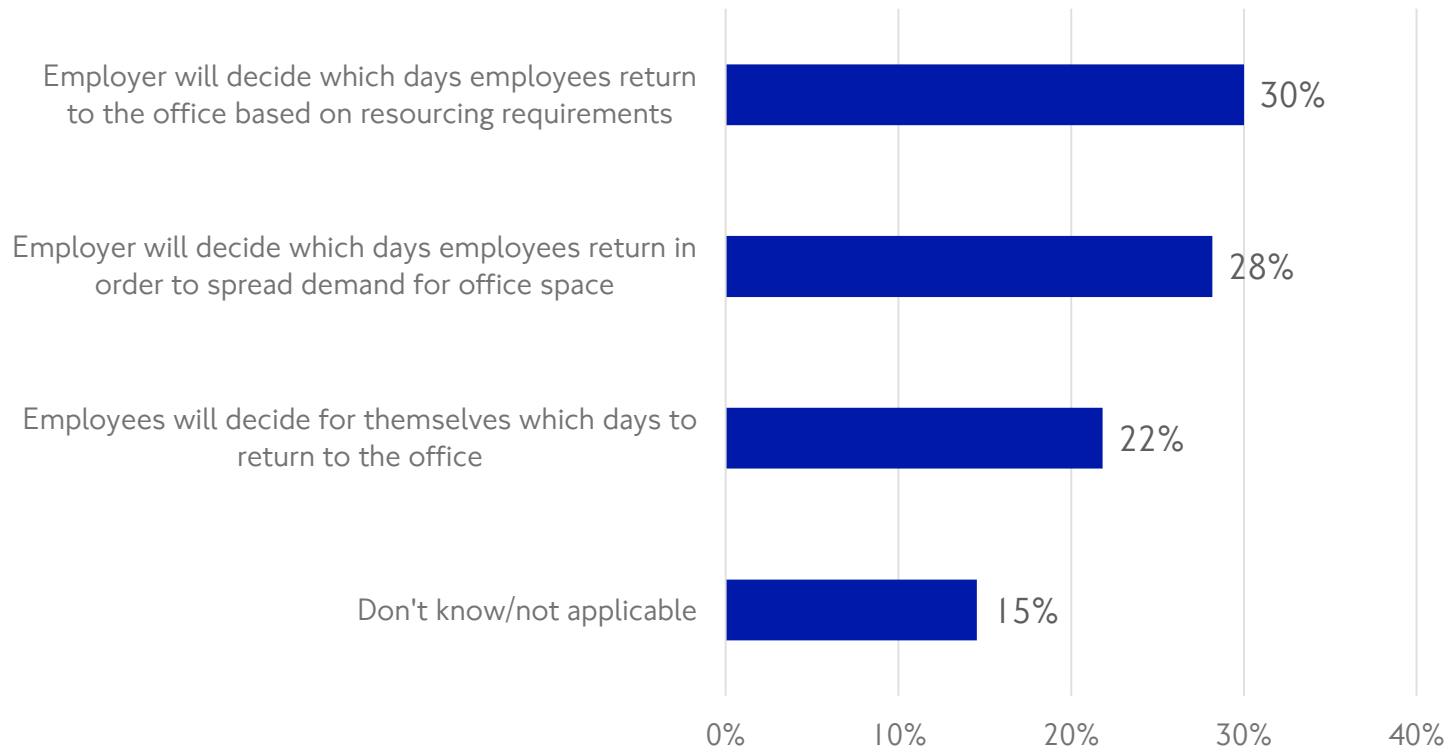
## In the longer term, 74% of respondents expect their business to adopt more days spent working from home compared to before the coronavirus pandemic

Around half of respondents (44%) expect there will be less business travel in general and a third (30%) of respondents expect there will be more walking and cycling for travel to work.



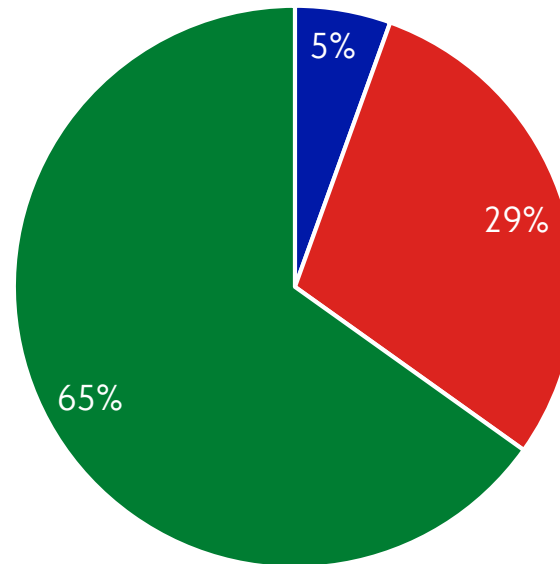
## Less than a quarter (22%) of respondents say that employees will decide for themselves which days to return to the office

More than half (58%) say that the employer will decide which days employees return to the office, either based on resourcing requirements (30%) or in order to spread demand for office space (28%)



## 65% of respondents have surveyed or engaged with their staff about barriers they may face when returning to the office

Around a third (29%) of employers have not surveyed their staff about the barriers they may face when returning to work, and 5% do not know if a survey or engagement has been undertaken

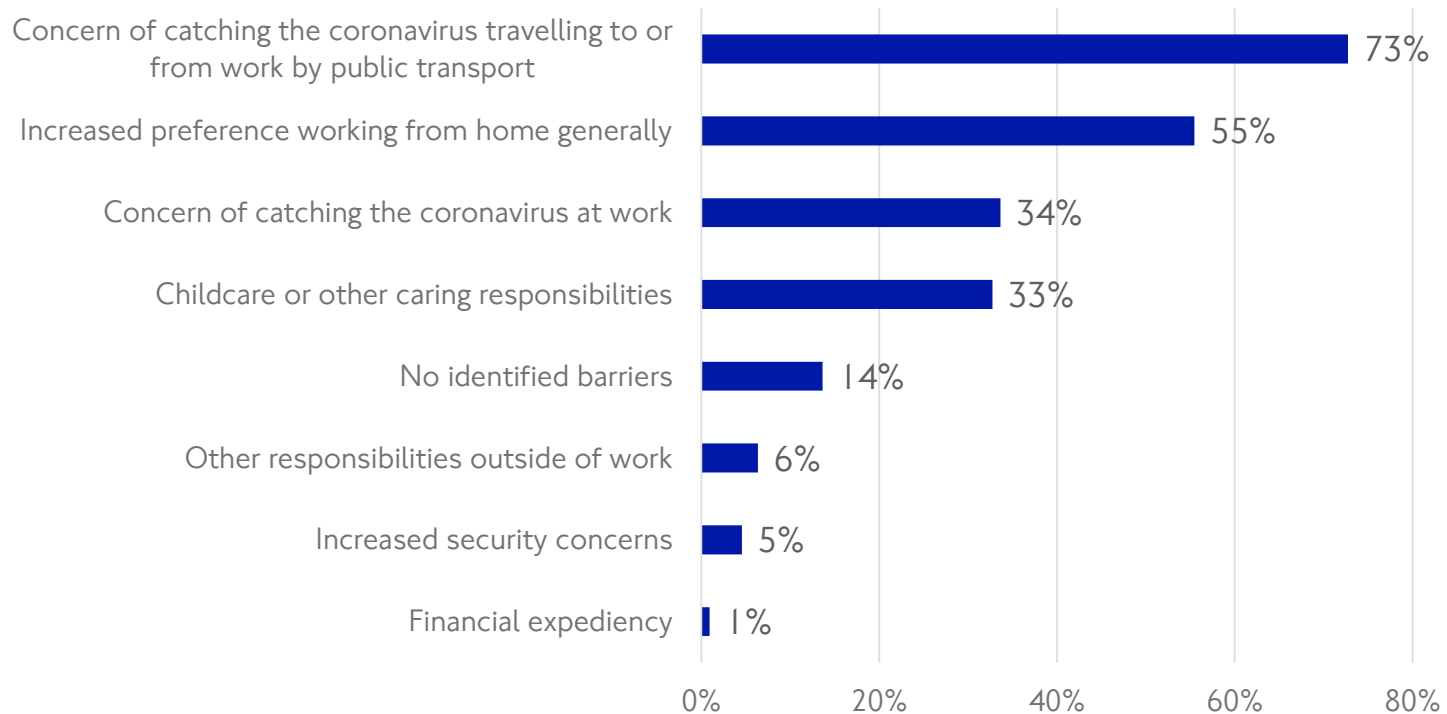


■ Don't know ■ No ■ Yes



## Three quarters of respondents (73%) cite concern of catching coronavirus when travelling on public transport as a main barrier that employees face working at their office location

Around half of respondents (55%) cite an increased preference working from home and around a third (34%) of respondents say they are concern of catching coronavirus at work or have child care or caring responsibilities (33%). These barriers were consistent between respondents that said they had engaged/surveyed employees, and those that had not



## Key themes from respondents on how TfL can help during the recovery are around flexible ticketing, service levels and enforcement of face coverings



Key themes reflect ongoing TfL activity to promote Pay As You Go travel, running a full service and enforcing face covering compliance:

- Flexible ticket pricing to reflect changes to working patterns
- Operate full service levels to help employees feel comfortable and safe returning to work
- Enforcement of face coverings

