

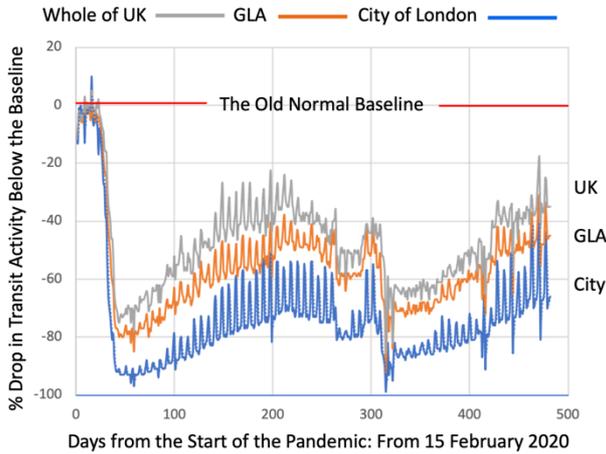
## **Written Evidence – Michael Batty, University College London – (PTC0002)**

### **When Will We Return To Work? The Impact of COVID-19 on Travel and Workplace**

The pandemic stopped us in our tracks in March 2020. We were not expecting it and although in hindsight, everything about it is explicable, we did not expect it to grow and spread so rapidly. Nor did we expect successive waves to occur even though serious study of pandemics in the past – on the outbreak of SARS in 2003, more recently Ebola, and the so called Spanish Flu at the end of the First World War – threw up all the effects that were exposed to then and which we have experienced since the early 2020.

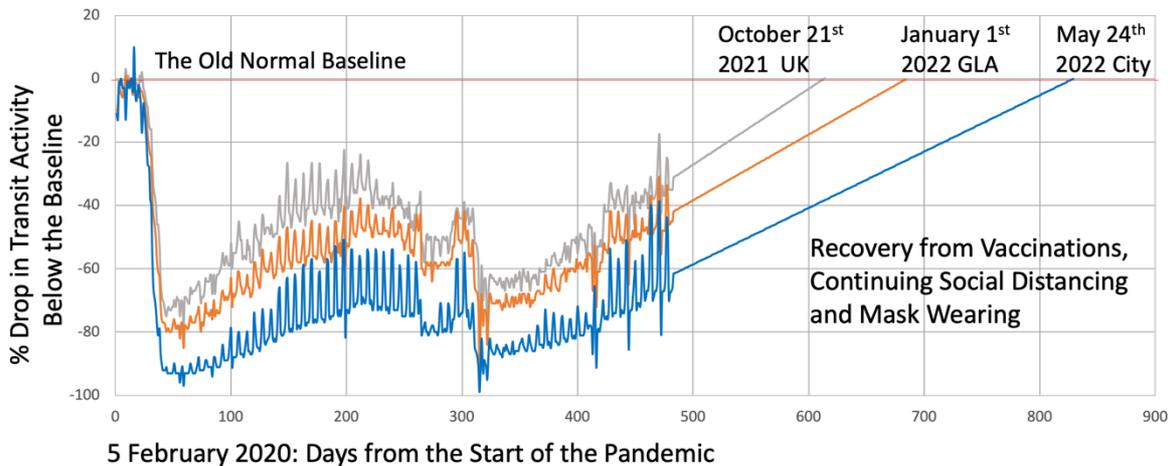
When the government declared a lockdown (which we date from 23<sup>rd</sup> March 2020), it advised that non-essential work defined as about 80 percent of the work force, should work from home. In fact this was possible for a large proportion of employment is in the soft services sector and many have access to internet technologies that mean working from home could become a reality. It is somewhat remarkable that had this pandemic occurred 10 years ago, we would not have had such seamless ways of online conferencing systems and it is still remarkable how easy this transition to such online usage has been. This has been significant not only for work but for retailing, education and to some extent health care.

There are now some good statistics on the impact of the lock down. Google and Apple mobility reports which take data from use of mobile devices on a daily basis provide a remarkably good and clear snapshot of how we have locked down, in particular showing how use of transit (bus and rail), occupancy at traditional workplaces, online retailing and so on has been affected. This is supported by data from the Department of Transport. The story is quite simple. The massive lockdown from March until June last year, the summer recovery, the growth of the second wave and regionally regulated lockdowns in the run up to Christmas 2020, the third major lockdown to damp the second or subsequent wave which began in earnest in December 2020, and the gradual lessening of the current lockdown are all graphically recorded in the mobility reports. The data we have used runs from February 15 2020 to June 6 2021. It does not pick up the new Indian variant which is leading to a third wave so our analysis here is based entirely on the first two waves. The best way to show this is in the following graphs



The fall in transit is massive during the first lockdown – in the City for example it falls by 95% in late March 2020 and only recovers to some 60% below the old normal by the summer. It then falls again to 90% in late December and recovers to about 60% at the time of writing this note (19/06/21). The graph (left) shows that the comparable UK figures involve a fall to about 70% below the baseline and a recovery to now about 30% with the Greater London Authority area some 10% below this UK percentage.

If we plot other data showing the drop in persons using the workplace, these mirror transit – the correlations between falls in transit use and workplace occupancy are 84%, 85%, and 97% for the UK, the GLA and the City respectively with the amount on average about 9%, 9.6% and 10% below those data in the first graph. What we have done is project the graphs and examine the point at which these transit volumes reach the old normal. We show these in the second graph below. We can predict exactly when these volumes return to normal. **For the UK, this would be next October 21<sup>st</sup>, 2021, for the GLA area January 1<sup>st</sup>, 2022** and for the **City of London as far away as May 24<sup>th</sup> 2022**. In short for the City, this would mean that the pandemic would have impacted on daily life for over 2 full years for places with densities of employment and the concentration on public transport that we see in the City. Note that in the City, there is a tiny population (8000 persons living there) but as of January 2020, there were 542,000 persons working there, most being transited to their place of work using public transport.



From these plots, we see that the recovery back to the old normal in the UK in its entirety is about 1% every 4 days, in the GLA (Greater London Authority

area) it is 1% every 5 days and for the City of London it is 1% every 6 days. In fact these projections include weekend working and if we exclude these and redo the analysis, the time back to the old normal is a good deal longer. If we examine the rate of recovery for the UK transit, the old normal is reached by October 31<sup>st</sup>, 2021 but if we work on the occupancy at the workplace, this is pushed back to 9<sup>th</sup> January 2022. For the GLA area, the recovery based on transit is 30<sup>th</sup> January while based on workplace occupancy, it is 10<sup>th</sup> April 2022. For the City of London, these times are even longer: for transit the recovery will not take place until 23<sup>rd</sup> October 2022 and for workplace occupancy this is almost the same with the old normal being restored by 2<sup>nd</sup> October 2022. This is nearly 6 months longer than the same analysis we presented which included weekend working.

All of this is fairly speculative for we do not know how people will react to going back to work and *ad hoc* surveys so far suggest that it will not approach the old normal. We do not have a comprehensive survey but from what has been reported about the City, office space is being slashed by many companies, some companies are insisting on a return to work for their employees while others suggest that a majority of staff in various big financial institutions can work part of the week from home<sup>1</sup>. Transport statistics<sup>2</sup> reveal that the London tube had recovered to only 47% of its old baseline by June 6<sup>th</sup> 2022, bus in London to 65% and National Rail to 50%. There has been a slight growth in car usage now just above the 2021 baseline

It is not possible to say much more than this unless we can get access to what individuals and companies believe will happen and even then this is not necessarily any more reliable than this analysis. What is clear however is that a new normal is emerging probably some 20% less occupancy of transit and workplaces than the old normal. There is considerable anecdotal evidence from vacant office accommodation, empty universities where there has been a massive shift to online learning, the big growth in property now empty and available to rent while the growth in demand for out of town residential living has been substantial.

*21 June 2021*

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<sup>1</sup> <https://www.fnlondon.com/articles/back-to-work-as-uk-lockdown-lifts-how-city-firms-are-planning-for-a-return-to-the-office-20210315>

<sup>2</sup> <https://www.gov.uk/government/collections/rail-statistics>