Knowledge Quarter Return to Work Survey

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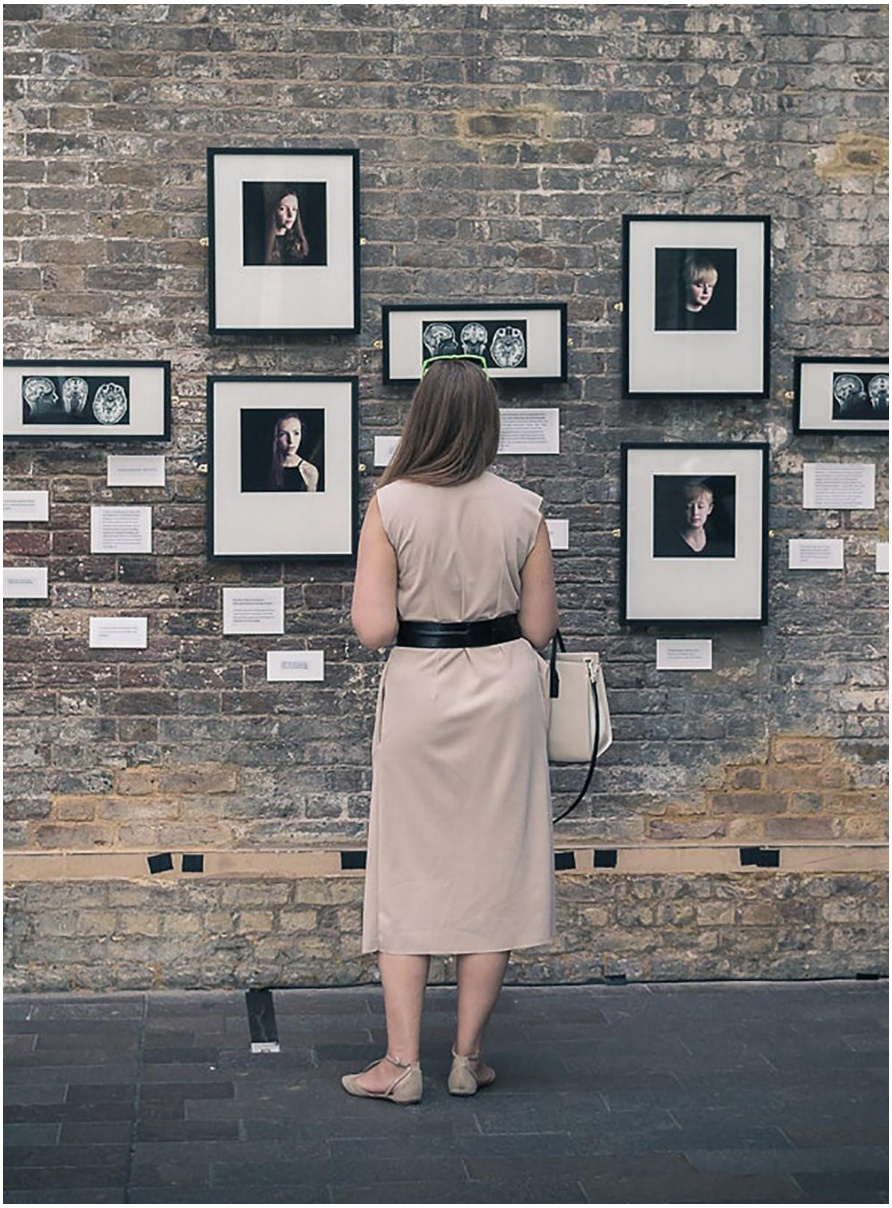

About the Knowledge Quarter:

The Knowledge Quarter is a partnership of over 100 academic, cultural, research, scientific and media organisations within a one-mile radius comprising King's Cross, Bloomsbury and Euston. Collectively, the geographic area of the Knowledge Quarter contains possibly the greatest knowledge cluster anywhere in the world and is the UK's largest innovation district. Find out more about our work at www.knowledgequarter.london.

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Knowledge Quarter Return to Work Survey
Final Analysis, May 2021

In March 2021, the Knowledge Quarter (KQ) published a survey to understand the impact that Covid-19 may have on working patterns for those who normally work in, and commute to, the Knowledge Quarter area. Other surveys have looked at working patterns at a national level, but none have looked specifically at the Knowledge Quarter area to understand how changes in working patterns may impact attendance at local venues and events.

The survey, which ran from March 8 to April 16, asked the following: had people moved during the pandemic? How has the pandemic affected working patterns and productivity? And how would future working patterns affect attendance of local events? The survey had over 500 respondents.

There should be caution in interpreting the data for two principle reasons: first, the sample is self-selecting to the extent that it comprises a demographic already highly engaged with cultural institutions; second, there was not a large enough sample of respondents under the age of 25 or of those over the age of 65, and so analysis of these groups has not been undertaken.

Executive Summary

Young people are moving out of London

- Over 7% of survey respondents had already moved permanently due to the pandemic. For those who had not yet moved, 16% were considering a move in the future with 75% opting to move outside of London.

- However, young people were disproportionately more likely to have moved or have a desire to move. Almost 13% of respondents aged 25 - 35 reported that they had moved home for reasons related to the pandemic compared to 9% of individuals aged 34 to 45 and only 1% of those aged between 45 to 54. In addition, almost 30% of those aged 25 – 34 were considering a move in the future.

Young people want to work from home for the majority of the time

- Respondents want remote working to continue. The preference is for either 1-2 days a week (40%) or 3-4 days a week (39%). However, age plays an important factor. Younger people are more likely to want to spend more time working remotely or from home, and older people are more likely to spend more time in the office. For example, those aged 25 – 34 want to spend the majority of their week working from home (48%) compared to those aged 55 – 64 (28%).

- Working remotely does not have a notable impact on perceived productivity. Almost 80% of respondents were either more productive or equally productive at home. Only 18% indicated that they were less productive. Again, age plays a factor – with younger respondents being more confident about their productivity working from home than older ones.

The pandemic has changed behaviour, but more so for young people

- These results, when taken together, suggest that young people have experienced a more significant change in their working patterns and behaviour. They expressed a desire to work most of their week remotely, to move to better housing and neighbourhoods outside of London and find themselves capable of being as productive at home as when working in the office.

Hybrid events will be the preferred option moving forward

- A hybrid approach was favoured for all events. It is clear, while there are preferences for some events to be mostly virtual, the majority of respondents want to retain some flexibility in how they attend events. There is a preference for private views, tours and networking events to be held in person, whilst a hybrid format was preferred for conferences, masterclasses, talks and lectures.

What does this mean for the Knowledge Quarter?

- Almost one in four young staff members are considering moving out of the capital. More than one in ten already have. Knowledge Quarter organisations will need to consider how their new working patterns can be supported.

- In open-ended questions, anticipating less time spent in the office, employees expressed a desire to make the time spent in the office more valuable. Organisations should consider how this might be achieved. With less time spent face to face, the Knowledge Quarter can play a more important role in the future with its experience convening and building connections between organisations.

- The Knowledge Quarter area will experience a significant decline in footfall due to uptake of remote working policies. The decline in footfall with have an impact on local hospitality, leisure, retail as well as on entertainment and cultural facilities. It will be more important than ever for local organisations to engage with the inclusive growth agenda given the impact this may have on the local economy.

- For London, the decline in footfall will mean a shift towards the experiential economy. Local authorities, cultural organisations, asset managers, BIDs and other business networks should work together to consider what the visitor offer of the surrounding area is and how they can collaborate on destination marketing projects and initiatives in the future.

Section 1: Literature Review

1.1 Summary
We conducted a literature review to examine recent findings related to our research aims around experiences of remote working and the permanency and effect of these changes in working patterns.

Recent research suggests that the pandemic has had a positive impact on productivity, with employees reporting that their productivity has risen or not diminished as a result of working from home. However, this sentiment is not universal, as working from home also appears to have negatively affected some people's mental health, for a variety of reasons.

As a result, employees want hybrid working polices in the future, a move supported by employers due to positive experiences of productivity during the pandemic. Home working has also been contributing factor in decisions to move further away from the workplace, suggesting that there is confidence from employees about the longevity of remote working policies.

Finally – although there are only a handful of studies looking at the impact of working patterns on local venue attendance – research does suggest that people are spending more time in their local neighbourhoods, and will be showing greater support for community businesses in the future.

1.2 People moving during the pandemic
Surveys conducted so far have found that, a significant proportion of people in the UK have moved because of the pandemic, and a greater proportion of people are considering a move in the future.

In December 2020, Ussher et al. conducted a survey of 20,000 adults in Britain. They identified that 4.8% of the UK population had moved for reasons relating to the pandemic, with a further 4.6% actively planning to do so, and 6% considering doing so. The demographic that was most likely to have moved were young adults in their mid-20s.

In 2021, YouGov found that 29% of workers in London and 20% of workers nationally would consider moving to a different area of the country that is not within commuting distance of their workplace. Additionally, the London Assembly Housing Committee (2021) found that 43% of respondents want to move home as a result of the pandemic, with 34% wanting to move out of London, 34% wanting to move to an inner London borough and 20% wanting to move to an outer London borough. Interestingly, 12% of respondents indicated that having an additional bedroom to use as an office was an important consideration in any new home.

1.3 Workers attitudes to home working
Research suggests that employees have a strong desire to continue working remotely in the future. Ussher et al. (2021) found that 79% of people who were required to work from home want to continue doing so, at least partly (57%) or all of the time (22%) in 2021. Whilst employees agree that they would like a

hybrid working model, the number of days that people would like to work from home varies. In addition:

- A survey of 2,500 UK office workers in July and August of 2020 found that 67% of respondents wanted a hybrid working model, either 1 or 2 days a week at home (34%) or 3 or 4 days a week at home (33%) (Gensler Research Institute, 2020).

- Felstead and Reuschke (2020), drawing on data from the *Understanding Society: Covid-19 study*, found that almost 90% of employees who worked at home during the first lockdown would like to continue working from home in some capacity, and almost 50% of employees wanted to work from home often or all of the time.

- Similarly, parents and carers want to retain more flexible working patterns after the pandemic is over (*Working Families*, 2020).

- A YouGov survey in March 2021 found that only 19% of London workers would want to work from home full time, and 43% would want to work from home some of the time (Smith, 2021). This sentiment was shared by both men and women, however people aged 25 to 64 were more likely to want to work from home some of the time compared with respondents aged 18 to 24.

1.4 Home working and productivity

Existing research on the relationship between working from home and productivity levels shows that these findings need to be contextualised.

Parry et al. (2021) produced an analysis drawing on data from the *Understanding Society COVID-19* survey, which included over 1,000 responses to an employee wellbeing survey and 38 in-depth interviews with managers and colleagues without management responsibilities collected between July and December 2020. They found that 88% of employees felt that they got as much if not more work done at home as they did in the office, but employees also reported lower mental health scores (Parry et al., 2021).

Westfield Health (2021) conducted a survey of 1,600 employees and HR leaders across England between November and January 2021. They found that a third of employees reported poor mental health at their organisation and only 20% of employees reported high productivity levels with their work.

Other research has found that lack of social interaction with colleagues and difficulties managing a work-life balance are contributing factors to lower levels of mental health among employees (Conner, 2021). Employees also reported feeling the need to be available at all times (Microsoft Surface 2021). A lack of a work-life balance with home working was also found by Office for National Statistics. Those who worked from home in 2020 did an average of 6 hours of unpaid overtime per week compared to 3.6 hours for people who worked in the office.

Recent research has also found that individuals with poor working from home setups and communication difficulties experience the greatest amount of productivity losses. This suggests that if investments in working from home setups are made, it may lead to higher reported levels of productivity, in addition to greater levels of employee health and wellbeing (Kitagawa et al., 2021). The ability to work from home also appears to vary by social group. Blanchflower and Bell (2020) found that young people, people with lower educational qualifications and ethnic minorities are least able to work from home.

1.5 Future hybrid working policies

Employers have had the opportunity to test whether they can run their businesses as effectively remotely as they can in the office. Recent research suggests that they feel that they can, indicating that hybrid working patterns will remain once offices reopen.

According to a global survey of 800 executives conducted by McKinsey & Company in June of 2020, 20% of UK executives would let at least one tenth of their employees work remotely for two or more days a week going forward (Lund et al., 2020).

Additionally, the World Economic Forum's (2020) survey of 291 companies across 26 countries from January to September of 2020 found that over 90% of UK respondents agreed that they were going to provide more opportunities to work remotely and accelerate the digitalisation of work processes.

A survey of over 4,000 UK employees and 12 in-depth interviews with decision-making leaders of UK organisations conducted by Microsoft Surface (2021) in October and November of 2020 found that 87% of organisation decision makers believe that their businesses have adapted effectively to remote working, and 66% had either introduced or adapted a working from home policy.

Alongside future hybrid working policies, many business owners are planning changes to their workplaces. Robert Walters (2020) surveyed over 2,000 global organisations and found that 37% of business were considering a reduction in the size of their office spaces.

1.6 Importance of places outside work

The past year has also led to people becoming more appreciative of their local area. Ussher et al. (2021) found that people considered good local shops, supportive communities, and places to go out to be more important to them as a result of the pandemic. More than a third of respondents stated that they would spend more time in their local area after the pandemic, and only 10% said they would spend less time. Younger adults, people in work, people on higher incomes and people living in larger families were more likely to indicate that they would spend more time in their local area (Ussher et al., 2021).

Section 2: Survey Analysis

2.1 Moving during the pandemic

As a result of the Covid-19 pandemic, have you permanently moved to a new home?	
I have not moved home	80%
I have moved home	7%
I have moved home, but not due to Covid-19	10%
I have moved, but temporarily	2%

Respondents were asked whether they had moved due to the pandemic. Whilst the majority of respondents (80%) had not moved, 7% had moved permanently.

There were significant age differences within those who had permanently moved. Almost 13% of respondents aged 25 - 35 reported that they had moved home for reasons related to the pandemic compared to 9% of individuals aged 34 to 45 and only 1% of those aged between 45 to 54.

If you have moved where have you relocated to?	
Camden or Islington	14%
Inner London (Zone 1 – 3)	19%
Outer London (Zone 3+)	12%
Outside of London (<2 hours commute)	33%
Outside of London (>2 hours commute)	17%

For those who moved during the pandemic, 50% had moved out of London. For those who moved within London, 14% moved to the boroughs of Camden and Islington, 19% moved to Inner London and 12% moved to Outer London.

The survey highlights that younger people are more likely to have moved, both due to the pandemic and for reasons unrelated to the pandemic. Whilst, some outflow from London is to be expected, it is clear that the pandemic may have accelerated this. Interestingly, it seems that those aged over 45 are unlikely to have moved or have a desire to move; despite the impact the pandemic may have had. This could be that older respondents are more likely to be homeowners and are therefore comparatively less mobile.

2.2 Moving in the future

If you have not moved, are you considering a move in the future due to changes in remote working opportunities?	
Yes	16%
No	67%
Don't Know	16%

Respondents were also asked, if they had not moved, whether they were considering a move due to changes in remote working opportunities. Roughly 67% said no, 16% of respondents said yes and a further 16% said that they were unsure. Again, age plays a significant factor. Almost 30% of those aged 25 – 34 were considering a move in the future, compared with 19% of those aged 35 – 44, 14% of those aged 45 – 55 and 3% of those aged 55 – 64.

Which area best describes where you would like to relocate to?	
Camden or Islington	1%
Inner London (Zone 1 – 3)	12%
Outer London (Zone 3+)	8%
Outside of London (<2 hours commute)	53%
Outside of London (>2 hours commute)	22%

For those considering a move, 75% wanted to move outside of London, 7% wanted to move to Outer London, 12% wanted to move to Inner London and only 1% wanted to move to the boroughs of Camden and Islington. These findings supports the trend of people who prioritise the local area when considering a move, over the commuting time or distance.

2.3 Remote working during the pandemic

On balance, are you more or less productive whilst working remotely?	
Much more productive	14%
More productive	29%
Neither less or more productive	35%
Less productive	14%
Much less productive	4%
Don't know	4%

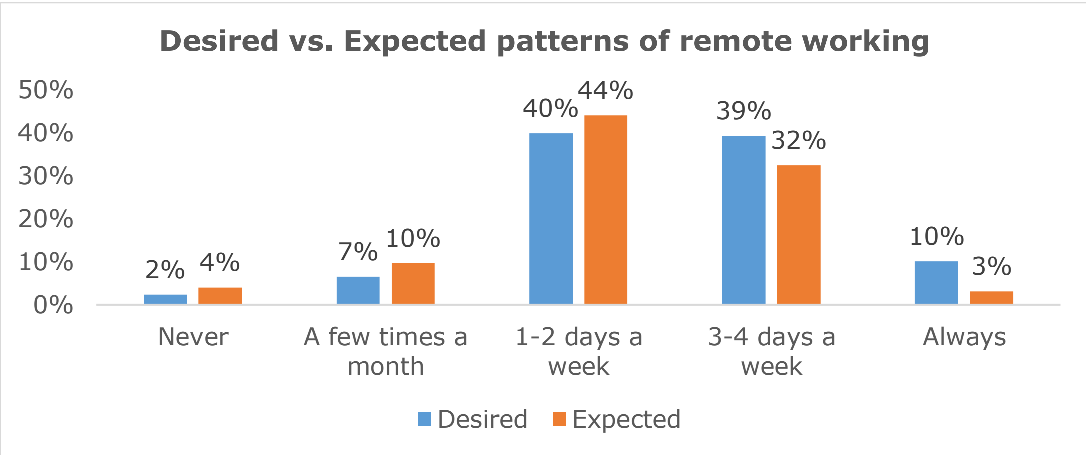
The next section looked at survey participant's experiences of remote working. Participants were asked whether they were more or less productive when working remotely. Almost 43% indicated that they were more productive to some degree, 35% indicated that their productivity levels had not changed and 14% said that they had become less productive whilst working remotely.

Those aged 25 – 34 and 35 – 44 were disproportionately more or much more productive at home (49%, 51%), whilst those over the age of 45 – 54 and 55 – 64 were much less (43%, 31%). Women were also more productive (45%) compared to men (40%) who were also more likely to say they were on average less productive (25%). Respondents with caring responsibilities were also likely to be more or much more productive working from home (49%).

2.4 Ability and desire to work from home remotely

What percentage of your role can be done effectively remotely?	
0 - 20%	6%
20 - 40%	7%
40 - 60%	13%
60 - 80%	22%
80 - 100%	50%

On average employees of the Knowledge Quarter think that the majority of their work can be done effectively remotely, with over half of respondents stating that between 80 to 100% of their work can be done effectively remotely. Women are more likely to think that that majority of their work can be done remotely (54%) compared to men (39%).



When asked about their desired future patterns of remote working almost all respondents across all demographics reported that they want to work either 1-2 days a week (40%) or 3-4 days a week (39%). It is clear there is a strong desire to reshape office working patterns in the future due to lived experiences.

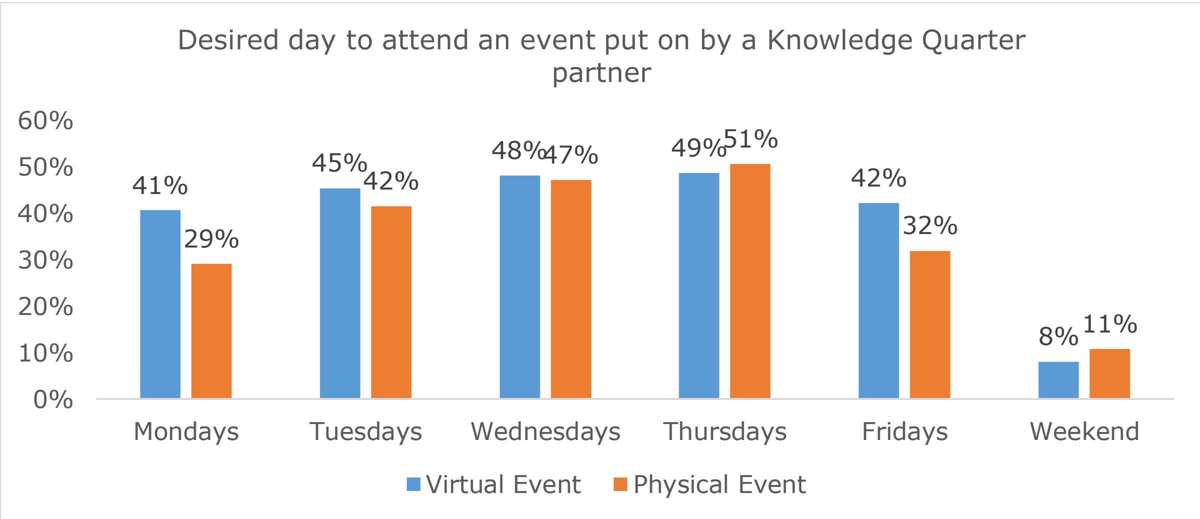
Age plays a factor in the desired degree of desire for remote working. Younger people are more likely to want to spend more time working remotely or from home, and older people are more likely to want to spend more time in the office. For example, those aged 25 – 34 want to spend the majority of their week working from home (48%) compared to those aged 55 – 64 (28%). Those with caregiving responsibilities were also more likely to want to work from home for the majority of their week (47%).

Coupled with the question about productivity, it might be reasonable to suggest that younger people have fared better in the transition to working from home. This may be because younger people have less established working practises in office environments than their older colleagues, and are more comfortable with the technology involved with remote working. In contrast, older people, who may have more established social networks and working practices in the office, may feel more comfortable with returning to this traditional place of work.

To the best of your knowledge, when do you think you’ll back be working in your physical office?	
I am currently working in the office	5%
April - June	36%
July - September	35%
October - December	12%
Not until 2022	3%
Never	1%
Don't know	8%

The majority of respondents expect to be in the office by latest September. There seems to be much more clarity in terms of reopening compared to previous lockdowns and only a small proportion (3%) expect to only be in the office in 2022.

2.5 Attendance of Events



Survey respondents were asked about their preferred day and time to attend either a physical or a virtual event given that their working patterns may change due to new remote working patterns. Wednesdays and Thursdays were the slightly more preferred days for attending virtual events with mid to late afternoon (2 – 5PM) as the most popular time slot. However, caregivers were more likely to prefer late morning time slots (11 – 12PM) and prefer events within the working day.

Preferred time to attend an event put on by a Knowledge Quarter partner		
	Virtual Event	Physical Event
Early morning (7am-9am)	11%	17%
Morning (9am-11am)	25%	18%
Late morning (11am-12pm)	30%	23%
Early afternoon (12pm-2pm)	30%	29%
Mid-afternoon (2pm-4pm)	36%	25%
Late afternoon (4pm-5pm)	38%	32%
Evening (after 5pm)	34%	46%

In comparison, Wednesdays and Thursdays were the preferred day for physical events. The preferred time slot was in the evenings (47%) although one in three respondents would attend an event in the early afternoon or late afternoon.

Overall, a hybrid approach was favoured for all events. It is clear, while there are preferences for some events to be virtual, the majority of respondents want to retain some flexibility in how they attend events. There is a preference for private views, tours and networking events to be held in person, whilst a hybrid format was preferred for conferences, masterclasses, talks and lectures.

What format do you want the following events hosted by a Knowledge Quarter organization to take place?			
	Online	In person	Hybrid
Talks and lectures	27%	10%	60%
Special interest groups	21%	17%	49%
Masterclasses and training events	21%	20%	55%
Conferences	18%	22%	55%
Professional network groups	14%	28%	46%
Networking events	9%	47%	34%
Shows and performances	5%	55%	36%
Private views and tours	4%	60%	32%

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