

The Future of Remote Working in Northern Ireland

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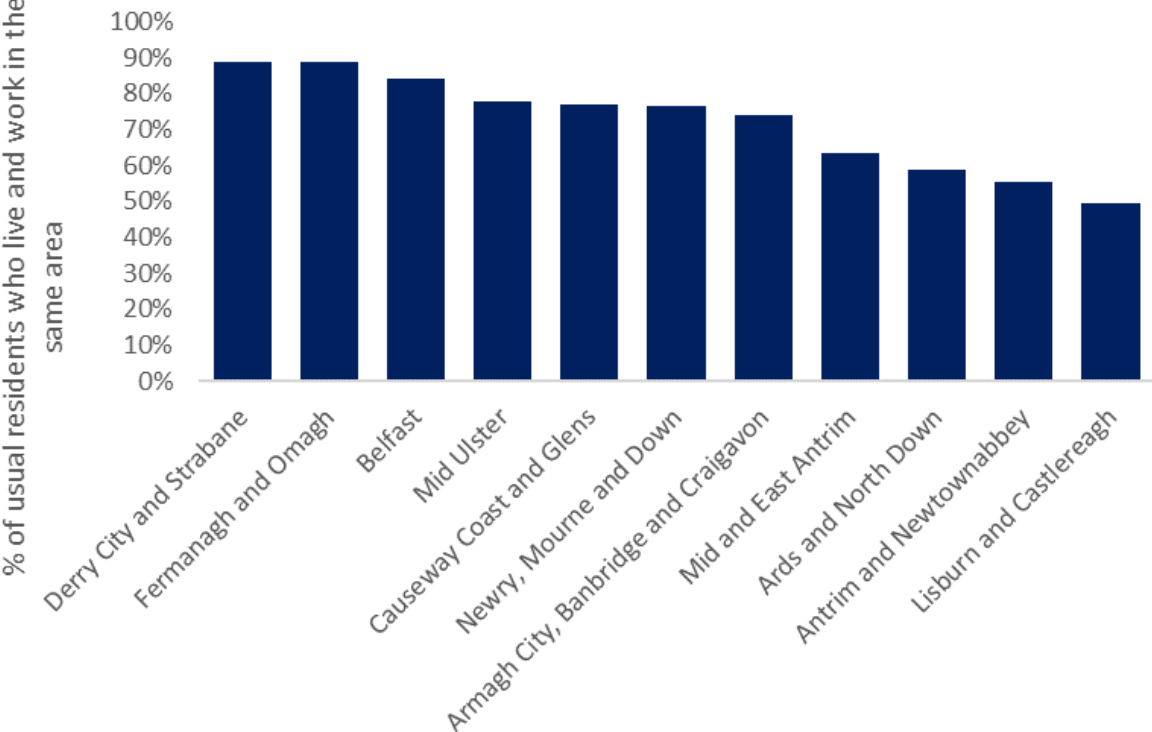


Commuting

The pre and post Covid-19 picture

Resident working patterns

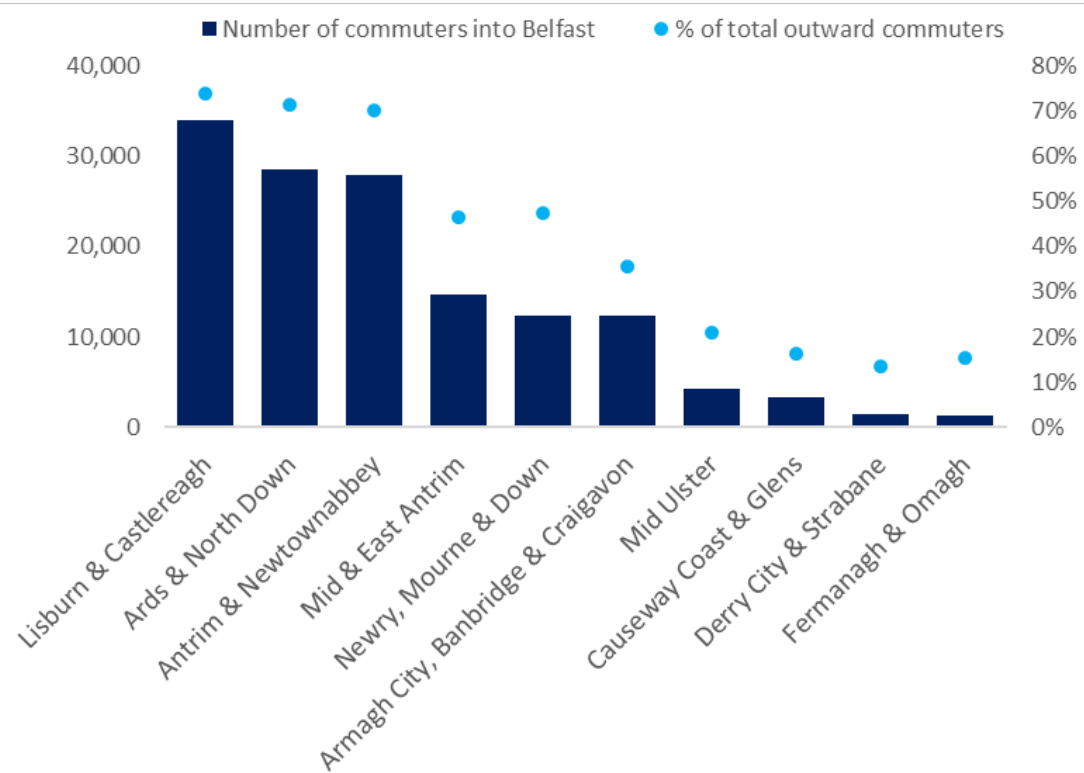
Residents living and working in the same council area, NI LGDs, 2011



- In general, most people live and work in the same council area, but this varies significantly across NI. Living and working in the same council area is more prevalent west of the Bann (Belfast aside) but this is much reduced in council areas with close proximity to Belfast.

Commuter movements into and out of Belfast

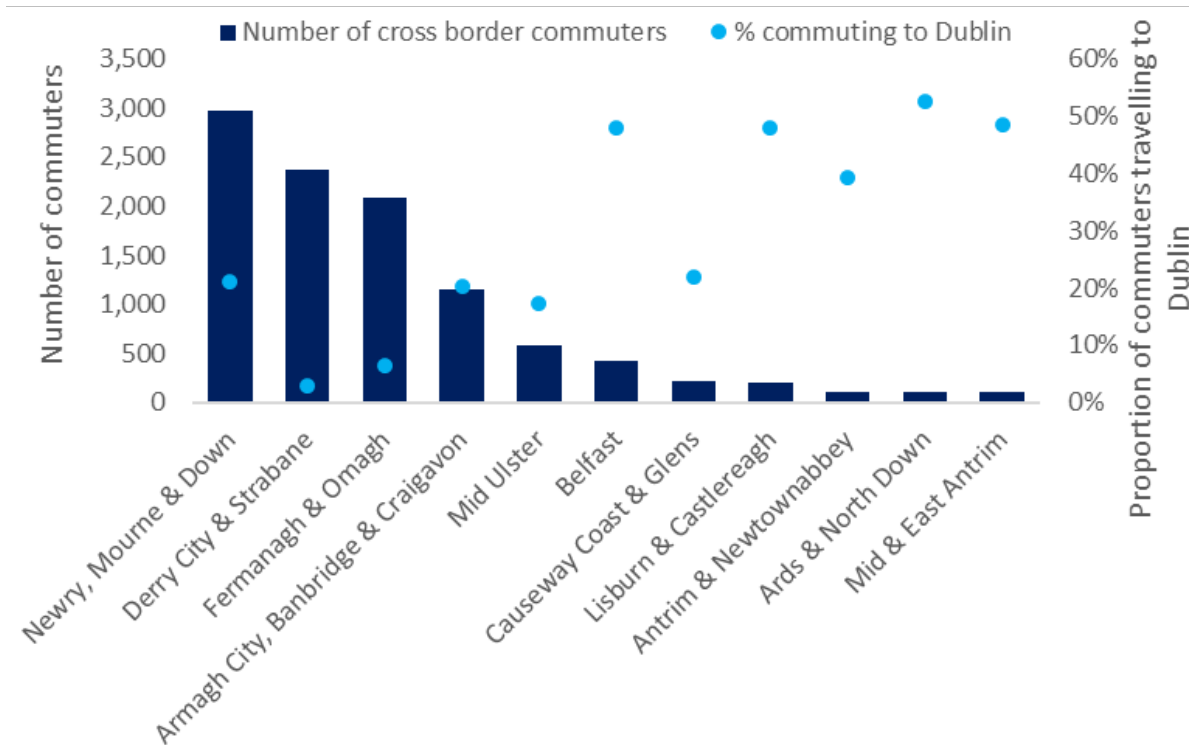
Estimated number of commuters into Belfast and % of total outward commuters, NI LGDs, 2020



- Belfast, as the economic hub, draws in commuters from across NI (approx. 140k people) and as a result almost all other councils have a net outflow of commuters – except for Fermanagh & Omagh and Derry City & Strabane which are more broadly in balance.
- Proximity drives numbers in line with three Councils making up nearly two thirds of the total
- Outward commuters from Belfast into other council areas are most prevalent in Lisburn & Castlereagh, Ards & North Down and Antrim & Newtownabbey

Cross border commuting

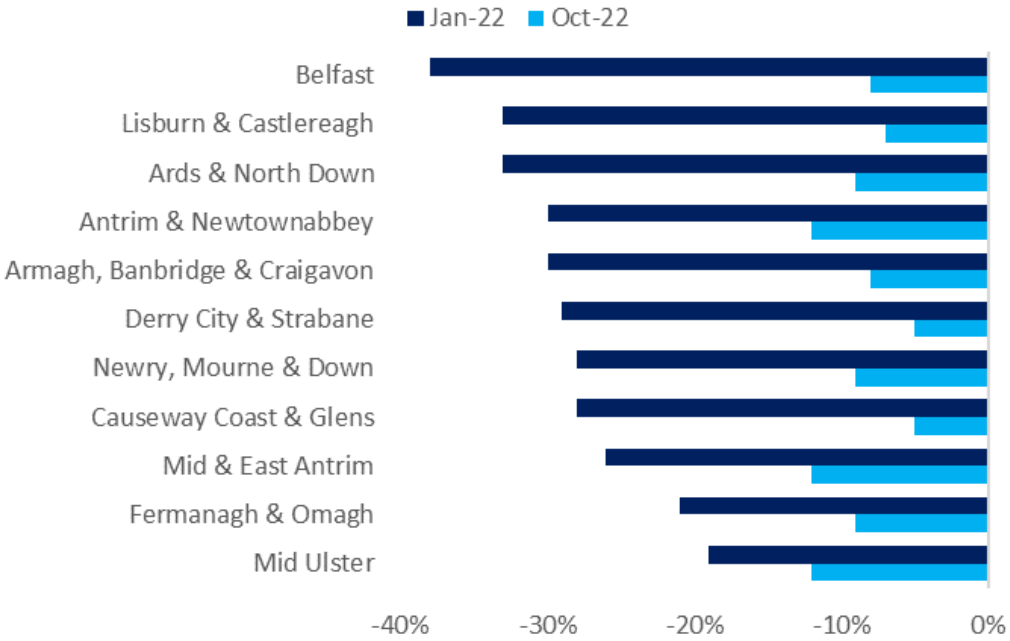
Cross-border commuting estimates, NI LGDs, 2020



- There are approximately 10k people who commute from NI to the Republic of Ireland each day, primarily from Newry, Mourne & Down, Derry City & Strabane and Fermanagh & Omagh.
- Most cross-border commuting tends to be localised – 43% of commuters leaving Newry, Mourne & Down to travel to County Louth; 70% from Derry City & Strabane travel to County Donegal. Strangely, in council areas such as Belfast, Ards & North Down and Lisburn & Castlereagh smaller numbers of cross-border commuters are recorded but a much higher proportion are attracted to the wider Dublin area.

Cross border commuting

Workplace mobility, NI LGDs, January 2022 vs. October 2022

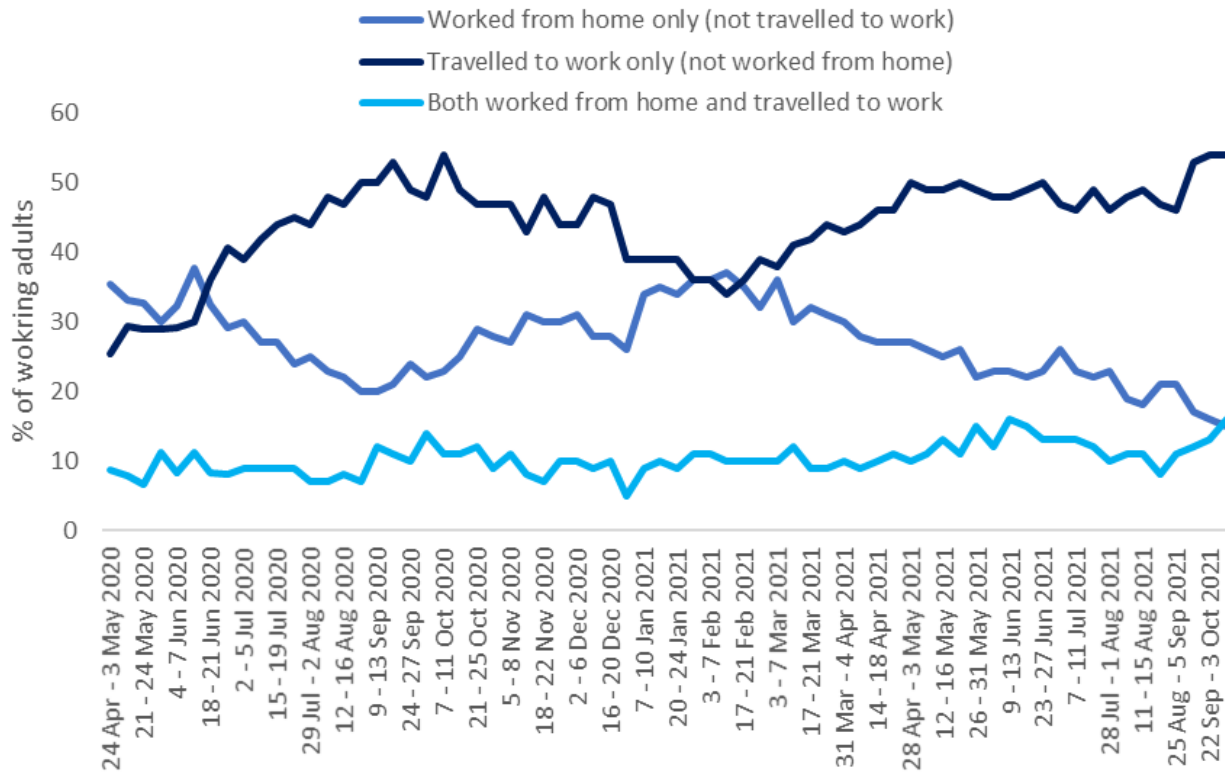


- In January 2022 NI was still very much experiencing the effects of Covid-19 restrictions and official government guidance still encouraged employees to work from home where possible.
- Google mobility study shows these effects have reduced greatly by October 2022 however commuting to the workplace is still below the pre-pandemic baseline of February 2020.

Remote Working Patterns

Recent patterns in working location

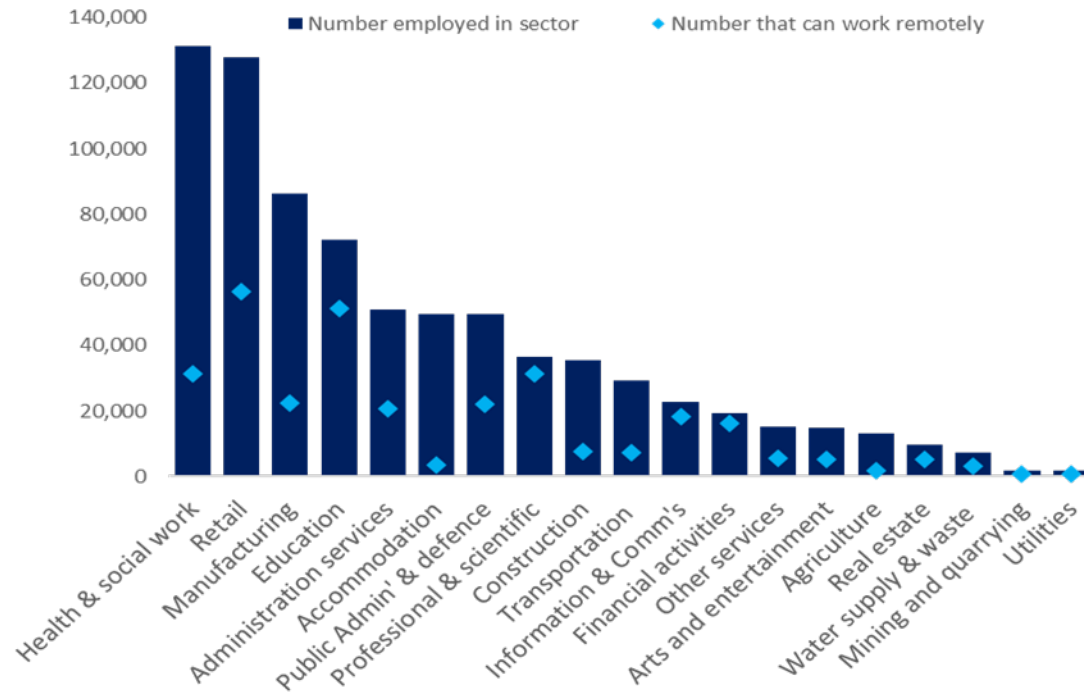
% of working adults working from home, GB, April 2020 – October 2021



- Pre Covid around 10% of employees in NI worked from homes “mainly or regularly”. These were largely concentrated among managerial, professional and administrative roles.
- Approximately 15% were working from home at the start of October 2021 (although there is a clear downward trend from the start of the year) and a further 12% working from home and travelling to work. The proportion of those working in a ‘hybrid pattern’ has started to increase in recent months.

Potential remote working by sector: 'in practice'

Total number of people employed by sector and the estimate that could 'in practice' work remotely, NI, 2020

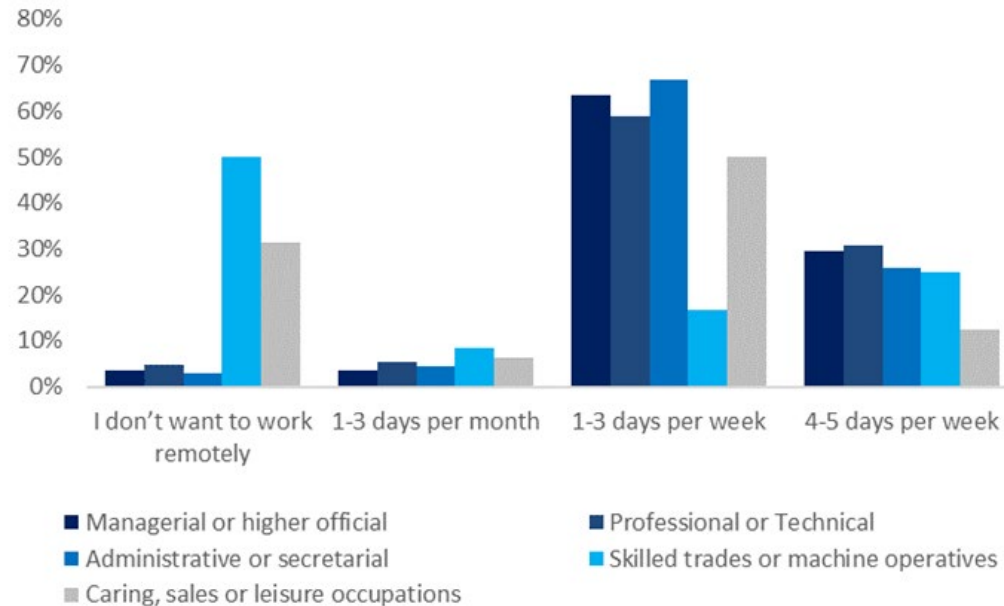


- This research provides a range of estimates, with a lower 'in practice' estimate and a higher 'in theory' estimate. However **this is not an immediate transition and it does not mean full-time remote working.**
- The 'in practice' estimate suggests 40% of total employee jobs in NI could be completed remotely based on **all of the job tasks** being able to be done away from the workplace. The graph on the left shows the differences across sectors with higher proportions of ICT and Professional Services jobs compared to, for example, Health & Social Work.
- 'In theory' up to 61% of jobs, at least in part could be completed remotely however their effectiveness may be compromised. I.e Healthcare and Education.

Survey Findings: What do employees think?

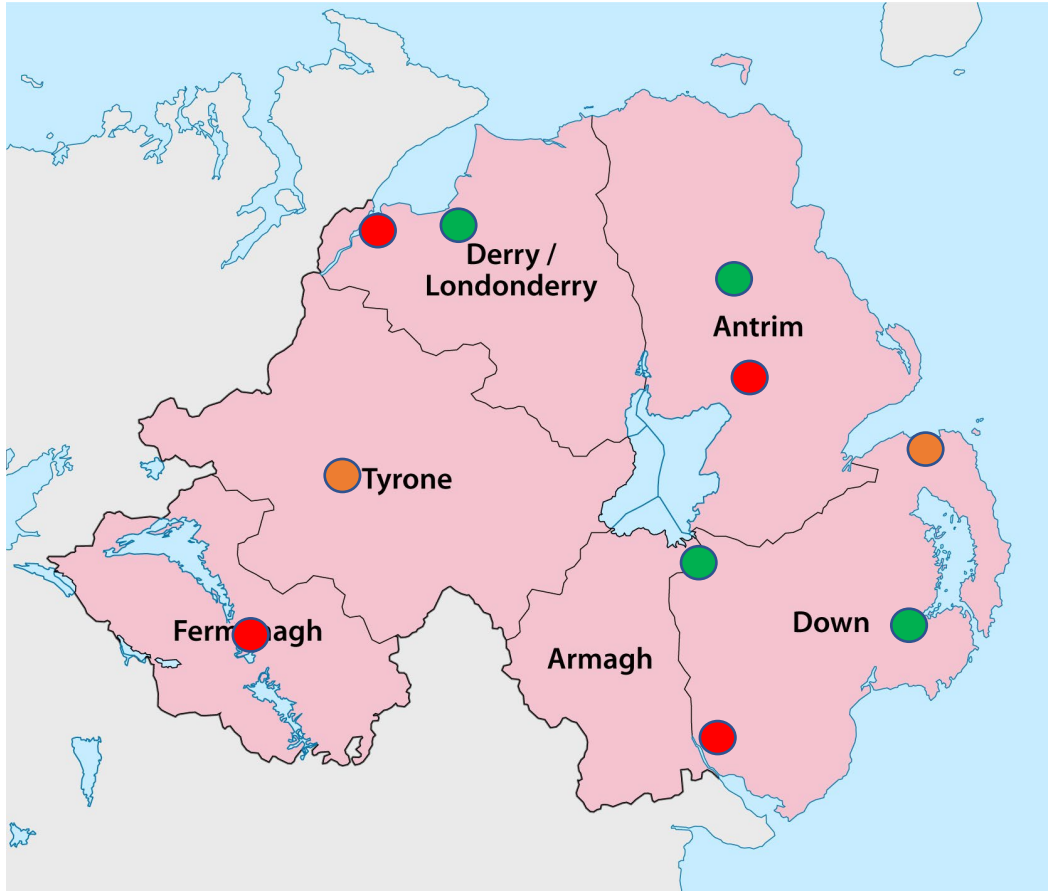
Preference shown for 2 to 4 days per week in the office

How often respondent wants to return to the office by occupation, NI, 2021



- Attitudes are also broadly similar across occupations, with only those in trades and caring/ sales/ leisure indicating less of a preference for remote working (consistent with traits of the role).
- Younger people showed preference for being in the office more days of the week. As part of the qualitative responses other respondents highlighted the benefits to younger staff being in the office to learn from those with more experience and the sharing of knowledge and ideas.

Connect2hubs



- Connect2hubs were announced as part of the response to remote and hybrid working. Higher levels of the public sector worked from home, than in the public sector – approx. 94% compared to 81% of private sector respondents.
- From our survey, most respondents were not interested in working in remote hubs, and of those who expressed an interest, their preference was to work in a hub dedicated to their organisation (or their part of the organisation), which was marginally more popular than a hub in their closest town

Some Qualitative Responses

“Saves hours each day in commuting time but I did feel ‘down’ for a while due to the lack of social interaction”

“A significant advantage is being able to structure hours around what suits and being able to work on in the evening to get projects finished. Greatest challenge is good access to internet which is costly”

“Not working in a loud open plan office which is quite distracting with noise, that affects concentration. Much quieter at home and concentration levels are higher.”

“Nearly an expectation that you are available 24/7 because you have everything set up to work from home. Hard to switch off.”

“When working from home in feel I always have to be "active" online even if I am using pen and paper I feel I need to move mouse around to stop computer going into sleep mode to show manager I am online "working"”

“Great work life balance. No drop in productivity. Environmental benefits - reduced car emissions, paper waste etc.”

“The mental isolation and lack of human contact has had a detrimental effect on my mental health.”

Policy challenges

Planning for the recovery beyond Covid

- Settled idea that the 'office is here to stay' – mix of thoughts around how it might best be used
- Concern around whether city centres are now the best location for workplaces **if** 'the buzz is gone' – part of the wider high street's future debate
- How far decisions about remote working will be led by the 'work' or the 'want'
- Will a new regulatory environment create the future of work – right to request, right to disconnect, etc

The 'hybrid' challenges for businesses (beyond the HR process)

- Management of remote working individuals and teams – training and wellbeing issues
- Dealing with remote working in a largely workplace-based organisation – equality issue
- To 'enable' remote homeworking or create new spaces – the workspace issue in terms of what is expected
- Completion, collaboration and innovation – the productivity issues

Work and the changing perspective, rationale and scale

- Policy innovations are being driven by three changes in approach:
 - Perspective – from a necessity due to COVID-19 to an opportunity;
 - Rationale – from a practice adopted on a temporary basis by firms to a permanent working arrangement and
 - Scale – from a niche way of working to one adopted by a significant proportion of the workforce (at least some of the time).
- Clear demand for more home-working and possible opportunities in attracting/retaining staff
- But issue also that this will not (ever) apply to significant numbers of people – scale remains a critical factor in terms of any response

Costs, benefits and 'Zoomshock'

- Benefits are normally most referred to – recruitment, retention, possible higher participation and well-being plus lower overheads
- But costs are also important here – equity question and managing the hybrid, 'zoom fatigue' and isolation, staff development and shift in management practises
- And then 'Zoomshock' ... what does this mean for city centres, property prices, sustainability (less commuting vs dispersal of development)
- Uncertainty is the over-arching theme here – in scale and impact

Thank You

