Work/Place

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London's workforce during Covid-19: understanding work patterns and behaviour

A review of the evidence

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Work/Place

This project, led jointly by the Policy Institute at King's and the King's Business School, is the first phase of a major programme of work to convene a group of large London-based employers and policy stakeholders to understand how the pandemic has impacted the way Londoners work, what the future of work in the city will look like, and how these changes have affected employers, employees, and London as a whole.

This will be achieved through a place-based, evidence-driven, and co-productive approach, which will develop and identify lessons for London in particular, and UK and international cities in general.

Find out more: kcl.ac.uk/policy-institute/research-analysis/work-place

Acknowledgements

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This paper primarily compares London with England, when data is available, rather than the UK, as Scotland, Wales and Northern Ireland have had different public health measures at different times.

Introduction

Throughout the pandemic, different surveys and measures have sought to trace changes in employer and employee behaviour in relation to working from home, in the office or in other workplaces.

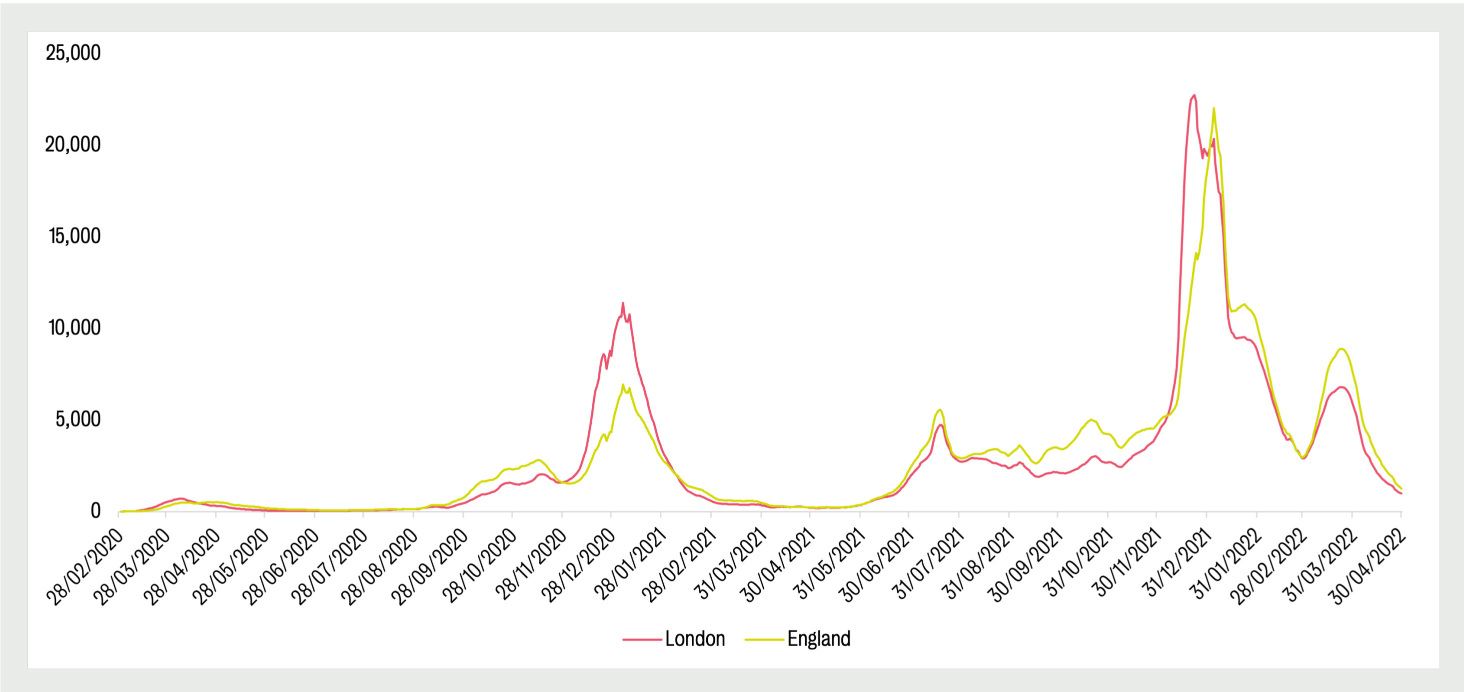
As part of the Work/Place project led by the Policy Institute at King's College London and the King's Business School, and following the publication of the first Work/Place survey on London's workers, their working habits, motivations and intentions, this paper assesses what these different data sources – including our own Work/Place survey – tell us about working from home in London, how behaviour responded to the changing policy and epidemiological context, how and why estimates differ, and what underpins London's persistently higher levels of home-/hybrid-working.

While Covid-19 has certainly precipitated or accelerated changes in working habits in the UK, where working from home was mandated or encouraged at different stages of the pandemic, there are differences between industries, occupations and workers that mean these have affected different parts of the country in different ways.

Background

The pandemic in London has followed a similar pattern to that in England, although London has seen an earlier rise and earlier peak in infections in some waves.

GRAPH 1: RATE OF COVID-19 CASES PER 100,000 POPULATION (SEVEN DAY ROLLING AVERAGE) IN LONDON AND ENGLAND, BY SPECIMEN DATE. DATA FROM 28 FEBRUARY 2020 TO 30 APRIL 2022



Source: Own elaboration based on the coronavirus (Covid-19) in the UK dashboard.

The domestic public health measures imposed on London and the rest of England, and the support packages available to workers, are summarised in the table below (admittedly smoothing over the nuances of different phases).

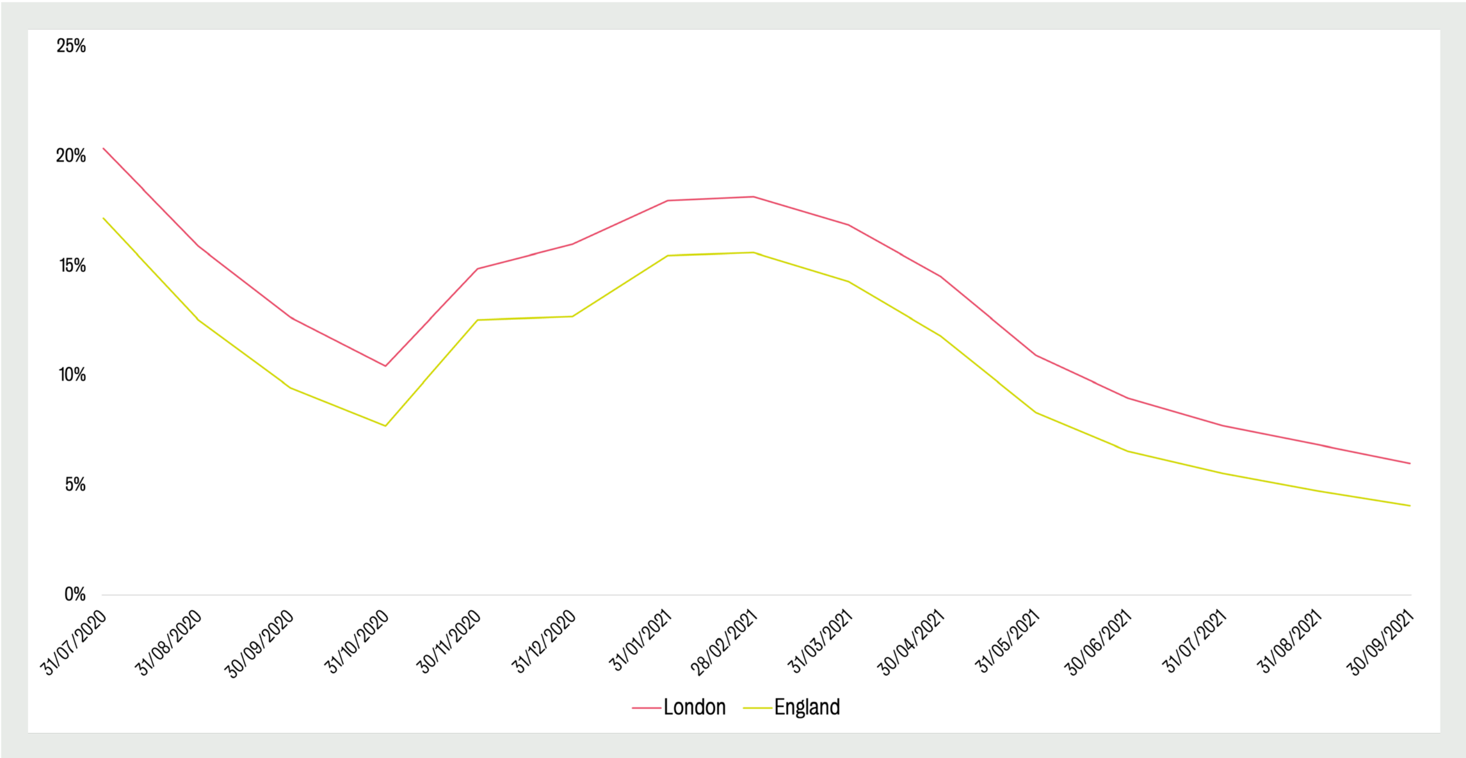
TABLE 1: PUBLIC HEALTH MEASURES AND EMPLOYMENT SUPPORT IN ENGLAND DURING THE PANDEMIC

Time period	Public health measures	Employment support
March – May 2020	Requirement to stay home (“national lockdown”), and to work from home unless essential	Coronavirus Job Retention Scheme (CJRS) to meet 80 per cent of furloughed employees’ wages
June – August 2020	Gradual relaxation of rules and re-opening of schools and workplaces. Work from home relaxed from 1 August	CJRS remained in place, with more flexibility
September – October 2020	Additional rules introduced – including “rule of six”, hospitality curfews and working from home recommendation. Tiers system introduced	CJRS remained in place, with more flexibility
November 2020	National lockdown reintroduced	CJRS remained in place, with more flexibility
December 2020	Return to tiered system, with escalation of measures over Christmas	CJRS remained in place, with more flexibility
January – March 2021	National lockdown reintroduced	CJRS remained in place, with more flexibility
April – July 2021	Gradual relaxation of rules and reopening of schools and workplaces. Work from home guidance ended on 19 July	CJRS payments began to taper down from August, and scheme ended on 30 September 2021
December 2021 – January 2022	“Plan B” restrictions requiring face masks and Covid Passes for some venues, and encouraging working from home (until 20 January)	
February – March 2022	Phased removal of all public health measures including self-isolation requirements and free testing	

Source: Institute for Government timeline of coronavirus lockdowns and measures, and gov.uk.

As set out above, the Coronavirus Job Retention Scheme, introduced in March 2020 and originally planned to be a short-term measure lasting for four months, was kept in place until September 2021, though the proportion of salary supported began to reduce from the beginning of August 2021. London had persistently higher levels of employments furloughed than other regions, reflecting the ability of many professional service jobs to be undertaken remotely, and the consequent loss of trade for in-person services (eg retail and hospitality) in the city centre.

GRAPH 2: TOTAL TAKE-UP RATE OF THE CORONAVIRUS JOB RETENTION SCHEME IN LONDON AND ENGLAND. DATA FROM JULY 2020 TO SEPTEMBER 2021



Source: Own elaboration based on CJRS time series.

What can we learn from survey data on working from home in London?

The main sources of official data relating to working patterns during the pandemic are surveys conducted by the Office for National Statistics (ONS). Among those that allow regional analysis are the Annual Population Survey, the Labour Market Survey, the Opinions and Lifestyle Survey, and the Business Insights and Conditions Survey.

While the scope and methods of these surveys differ, they have shown similar patterns of behaviour. Homeworking increased during the pandemic – particularly at times of heightened infection rates and/or more stringent public health measures – and levels have been consistently higher in London than the rest of England.

Annual Population Survey

The Annual Population Survey (APS) is a detailed annual survey based on part of the Labour Force Survey (LFS) sample, which is the UK's largest household survey covering a sample of around 80,000 people each quarter. During 2019, prior to the pandemic, the APS reported that 18 per cent of the 5.2 million workers with London workplaces stated that they had worked from home at least one day in the week prior to being interviewed,[1] and 34 per cent reported having ever worked from home. Across the UK, 12 per cent of workers reported having worked from home in the week prior to the interview, with 27 per cent having ever worked from home.

The APS figures for 2020 reflect the jump in home-working triggered by the pandemic, though the annualised data smooths over what were probably significant changes in-year: over the year as a whole, 37 per cent of London-based workers reported working from home at least one day in the week prior to the respective interview, compared to 26 per cent across the UK.

Labour Market Survey

Following the outbreak of Covid-19, and government's instruction to work from home where possible, the ONS used the Labour Market Survey (LMS), an experimental online-only household survey, to look at homeworking patterns. While the survey has not been repeated through the pandemic, it estimated that more than half (57 per cent) of workers living in London did some of their work from home in April 2020 (compared with 47 per cent across the UK).[2] Of that figure, 92 per cent of workers stated that this was mainly for reasons related to Covid-19 (compared with 86 per cent across the UK).[3]

Opinions and Lifestyle Survey

The ONS also redesigned the long-running Opinions and Lifestyle Survey (OPN) to include questions associated with the effects of the pandemic on people's working patterns. In the period March to May 2020, the OPN estimated that between 56

1 Question asked (APS): *In your main job, have you spent at least one full day in the seven days ending Sunday the [date] working in your own home?*

2 Question asked (LMS): *Did you do any working from home in the week Monday [date] to Sunday [date, year]?*

3 Question asked (LMS): *Was the main reason you were working from home in that week due to reasons related to coronavirus (Covid-19)?*

per cent and 66 per cent of working Londoners had worked from home due to the coronavirus pandemic for at least part of the week prior to being interviewed.[4] In England, the figure reached between 43 per cent and 46 per cent during that period. The focus of the survey excluded those workers who worked from home for reasons other than the pandemic.

During the third quarter of 2020, the proportion of London workers working from home fell slightly as infections fell and restrictions on movement and socialising were relaxed. The OPN estimated that, in the period June to August 2020, between 45 per cent and 55 per cent had worked from home due to Covid-19 in the previous week (between 37 per cent and 40 per cent in England).

Business Insights and Conditions Survey

From September 2020, the ONS started to publish data on homeworking based on the voluntary Business Insights and Conditions survey (BICS). Unlike the surveys mentioned above, the BICS is based on estimates from employers rather than workers. It also excludes some sectors, including public administration and defence, public provision of education and health, and finance and insurance. Also, its regional estimates only include businesses with a single site of operations. Thus, the BICS provides a valuable record of changes in managers' perceptions and sentiments, but is not strictly comparable to other surveys that look at workers' experiences, and cover all sectors and types of business.

In September 2020, London-based employers interviewed for the BICS estimated that 24 per cent of their workforce was working from home.[5] This figure increased to 37 per cent at the beginning of January 2021, when cases were peaking and the UK entered a third national lockdown. In England, that figure rose from 15 per cent to 20 per cent over the same period.

King's College London's Work/Place Survey

More recently, the Policy Institute at King's College London and the King's Business School published the results of the first Work/Place survey on London's workers, their working habits, motivations and intentions. Through this survey, carried out between 25 March and 13 April 2022, researchers surveyed a representative sample of 2,015 London workers aged 16 and above, defined as those who have a regular workplace in the capital. This allowed them to capture the views of people who live outside London but would have commuted into the city in the past.

In that survey, 75 per cent of London workers (not residents) reported working from home at least one day a week, of whom 13 per cent worked only from home.

4 Question asked (OPN): *In the past seven days, have you worked from home because of the Coronavirus (Covid-19) pandemic?*

5 Question asked (BICS): *In the last two weeks, roughly what proportion of your businesses' workforce were: (i) Working at their normal place of work; (ii) Working remotely instead of at their normal place of work; (iii) On full or partial furlough leave; (iv) On sick leave or not working due to coronavirus (Covid-19) symptoms, self-isolation or quarantine; (v) Made permanently redundant; (vi) Other (alternatives given between September 2020 and June 2021).*

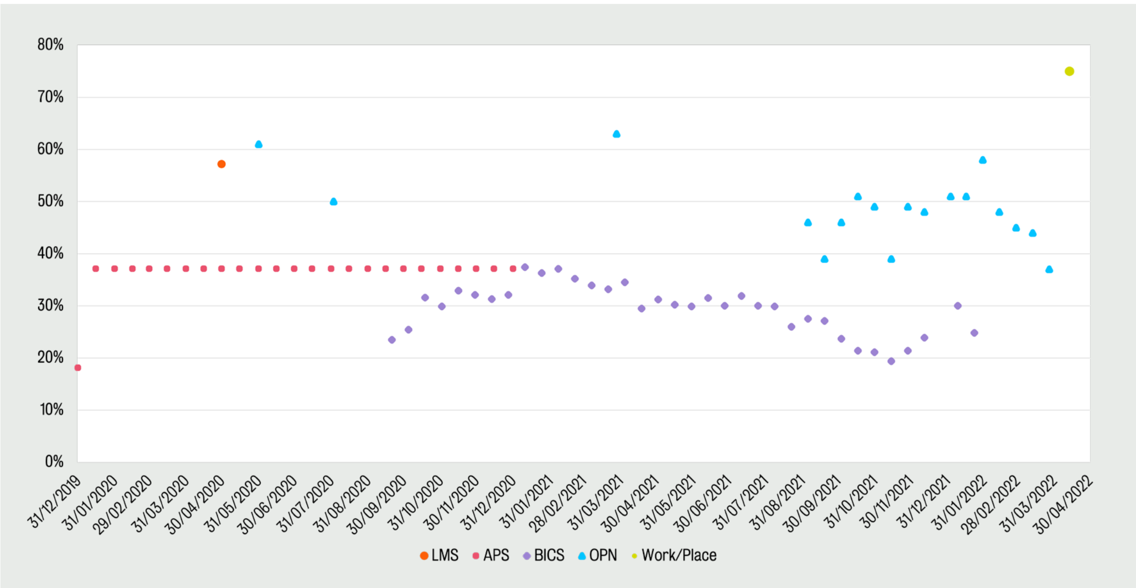
37 per cent of those who were also in work before the pandemic said they worked from home at least one day a week on average at that time. As roughly double this proportion (75 per cent) now report doing so, the survey suggests that the pandemic has brought about a significant change in the working patterns of London workers.

Comparing the findings

The differing scopes and methods of the different surveys are reflected in their differing findings. For example, in the period from January to March 2021, the OPN estimated that up to 65 per cent of working Londoners had worked from home due to Covid-19 in the week prior to being interviewed. This figure differs considerably from London employers' estimates, collected through the BICS, that 35 per cent of their workforces on average were working from home during the same period. This difference may partly reflect the fact that the BICS was asking employers to estimate the overall proportion working from home during the previous fortnight, while OPN was asking employees if they had worked at home at all (ie, even for one day) in the previous week, as well as the partial sectoral coverage of the BICS.

Notwithstanding the differences in results, the surveys show similar patterns. Both surveys show a reduction in homeworking in November 2021[6] (after the end of the Coronavirus Job Retention Scheme), but then a resurgence towards the end of the year, as the Omicron variant took hold and "Plan B" measures encouraged homeworking (though did not mandate it as in spring 2020 and early 2021).

GRAPH 3: LONDON'S WORKERS WORKING FROM HOME DURING THE PANDEMIC (AT LEAST ONE DAY OR SOME OF THEIR WORK FROM HOME), ACCORDING TO DIFFERENT DATASETS



Source: Own elaboration based on APS, BICS, LMS, OPN, and Work/Place data.

6 Between October 2021 and February 2022 (latest disaggregated data available), the alternatives given to answer the BICS question were slightly modified: *In the last two weeks, roughly what proportion of your businesses' workforce were: (i) Working from a designated workspace; (ii) Working from home; (iii) Using a hybrid model of working; (iv) On sick leave or not working due to coronavirus (Covid-19) symptoms, self-isolation or quarantine; (v) Made permanently redundant; (vi) Other.*

What can we learn from proxy data on working from home in London?

The pattern of London's workforce behaviour during the pandemic has also been captured by other less conventional data sources, such as the mobility reports from Google, the Centre for Cities' High Streets Recovery Tracker, and Transport for London (TfL) passenger data.

Google's Community Mobility Report shows movement trends by region, across different location categories, using aggregated and anonymised datasets from users who have enabled location history settings on their devices. Thus, it is possible to compare mobility in places categorised as workplaces by Google during the pandemic with previous baseline data, as a proxy for workers' return to the workplace.

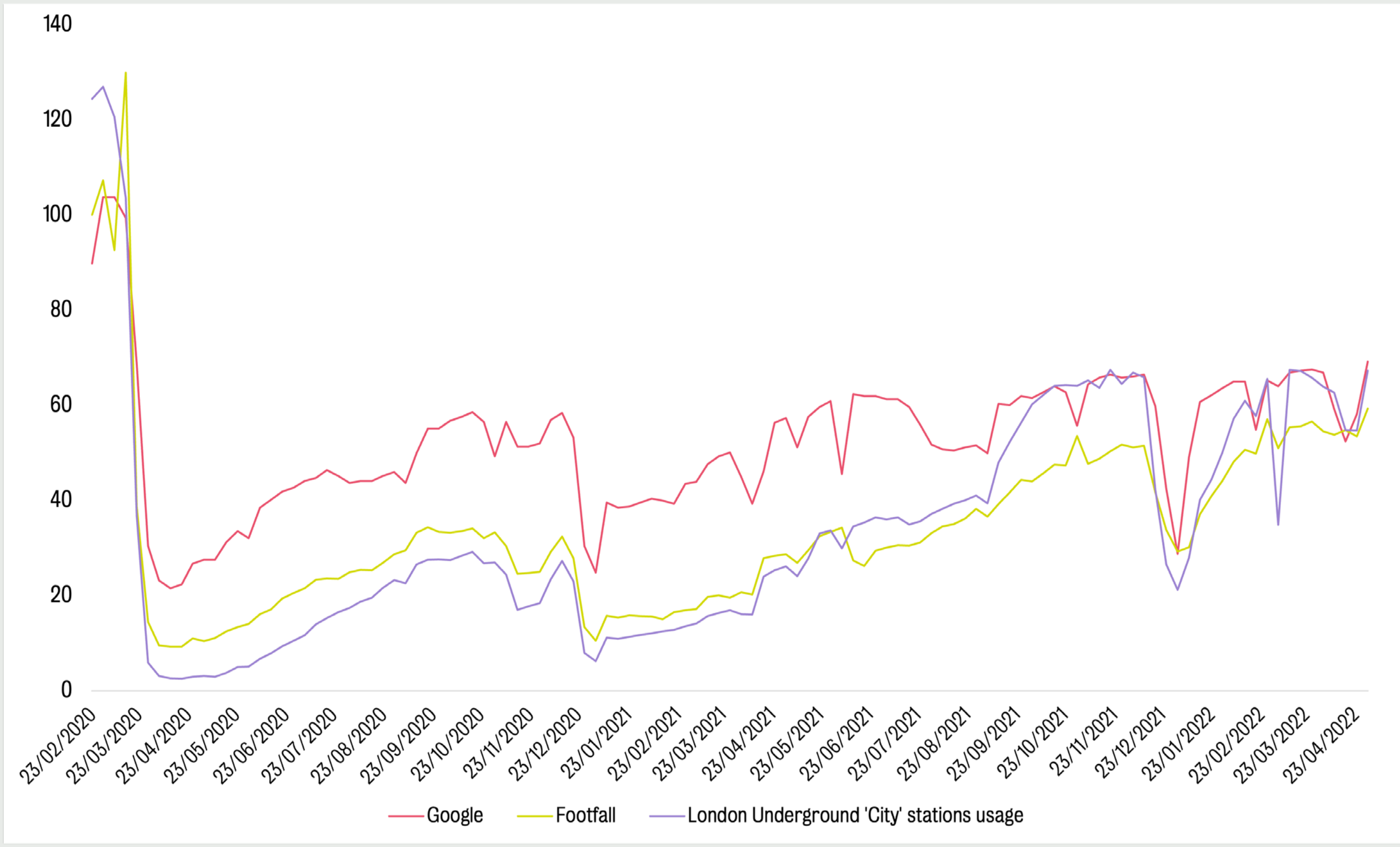
Similarly, Centre for Cities uses anonymised mobile phone data from Locomizer to track the level of activity in major UK cities during the pandemic, and compares these with pre-pandemic levels. Specifically, Centre for Cities uses a "working day index" to analyse daytime weekday footfall and compare it to a pre-pandemic baseline. In this way the index can be used as a proxy for workers returning to the office. For London, the index measures activity in a two-mile radius round Holborn.

Finally, TfL takes data from its ticketing system (Oyster and contactless payment card taps) to provide an overall picture of its customers' travels on the tube and bus networks. This information is disaggregated by station type, allowing it to measure the level of activity in specific sectors. The chart below shows use of the "City" group of 15 stations, which includes stations in and around the City of London, and at Canary Wharf – the hearts of London's finance and business services sectors.

As with the ONS surveys, the data provided by these sources are not directly comparable. They also have limitations of self-selection, differing geographic coverage, and of not distinguishing actual workplace visits to trips to the same areas for other reasons. Nevertheless, they show a similar patterns, with marked declines in movements at the beginning of the pandemic, and the beginning of 2021 and 2022. It is precisely in these periods – when working from home was government policy or Covid-19 cases had grown considerably – that an increase in the proportion of London workers working from home is most apparent.

It is also noteworthy that some times and places have seen a greater resurgence in footfall and travel than others. For example, TfL's data shows that on 26 May 2022, taps at "City" stations were 64 per cent of their pre-pandemic level (using 27 February 2020 as a benchmark), while taps at "shopping" stations (West End, Kensington and Knightsbridge, and Stratford) had returned to 83 per cent of pre-pandemic levels. Similarly, weekend use of the tube has recovered faster than mid-week, suggesting that people are more willing to visit central London for leisure than for work reasons, though the gap has narrowed in recent months.

GRAPH 4: FOOTFALL AND PUBLIC TRANSPORT USE DURING THE PANDEMIC, ACCORDING TO DIFFERENT DATASETS[7]



Source: Own elaboration based on CJRS time series.

7 The baseline (pre-pandemic) comparison period (base = 100) was standardised for Google, Centre for Cities and TfL data and determined as the respective average value between 15 February and 06 March 2020. The TfL data shows the daily activity – in terms of entry and exit taps at ticket barriers – for each underground station grouped into the “City” category (Aldgate, Aldgate East, Angel, Bank, Barbican, Canary Wharf, Chancery Lane, Euston Square, Farringdon, Holborn, Mansion House, Monument, Old Street, St Pauls, and Temple).

What is driving London workers' pandemic work patterns?

In the ONS surveys analysed, London had the highest proportion of home-based workers during the pandemic, and a similar pattern can be seen in the Centre for Cities and Google Mobility indices, which both showed persistently lower footfall in London than in other cities/city centres. While the changes in lockdown restrictions and employment support measures introduced by the government during the pandemic have undoubtedly played an important role in shaping behaviour, the disproportionate uptake of working from home in the capital has also been driven by the characteristics of its main industries and occupations, and by the greater time and cost of commuting for London workers.

While London is active in many different industries, its workforce is significantly concentrated in sectors that, by nature, are more conducive to working from home, such as "Professional, Scientific and Technical Activities" and "Information and Communication" (see Table 2). In addition, more than 60 per cent of Londoners work in professional or managerial occupations (see Table 3), which involve a greater number of tasks than can be performed remotely.

TABLE 2: WORKFORCE JOBS BY INDUSTRY SECTION SEASONALLY ADJUSTED (OCTOBER – DECEMBER 2021)

SIC 2007	London (%)	England (%)
Primary and Utilities	1	2
Manufacturing	2	7
Construction	5	6
Wholesale And Retail Trade; Repair of Vehicles	11	14
Transportation And Storage	5	5
Accommodation and Food Service	7	7
Information and Communication	8	5
Financial and Insurance	7	3
Real Estate	2	2
Professional, Scientific and Technical	14	10
Administrative and Support Service	9	9
Public Administration and Defence	5	4
Education	7	9
Human Health and Social Work	11	13
Arts, Entertainment and Recreation	3	3
Other Services	3	3

Source: Own elaboration based on ONS data (Workforce Jobs By Industry).

TABLE 3: EMPLOYMENT BY OCCUPATION (JANUARY - DECEMBER 2021)

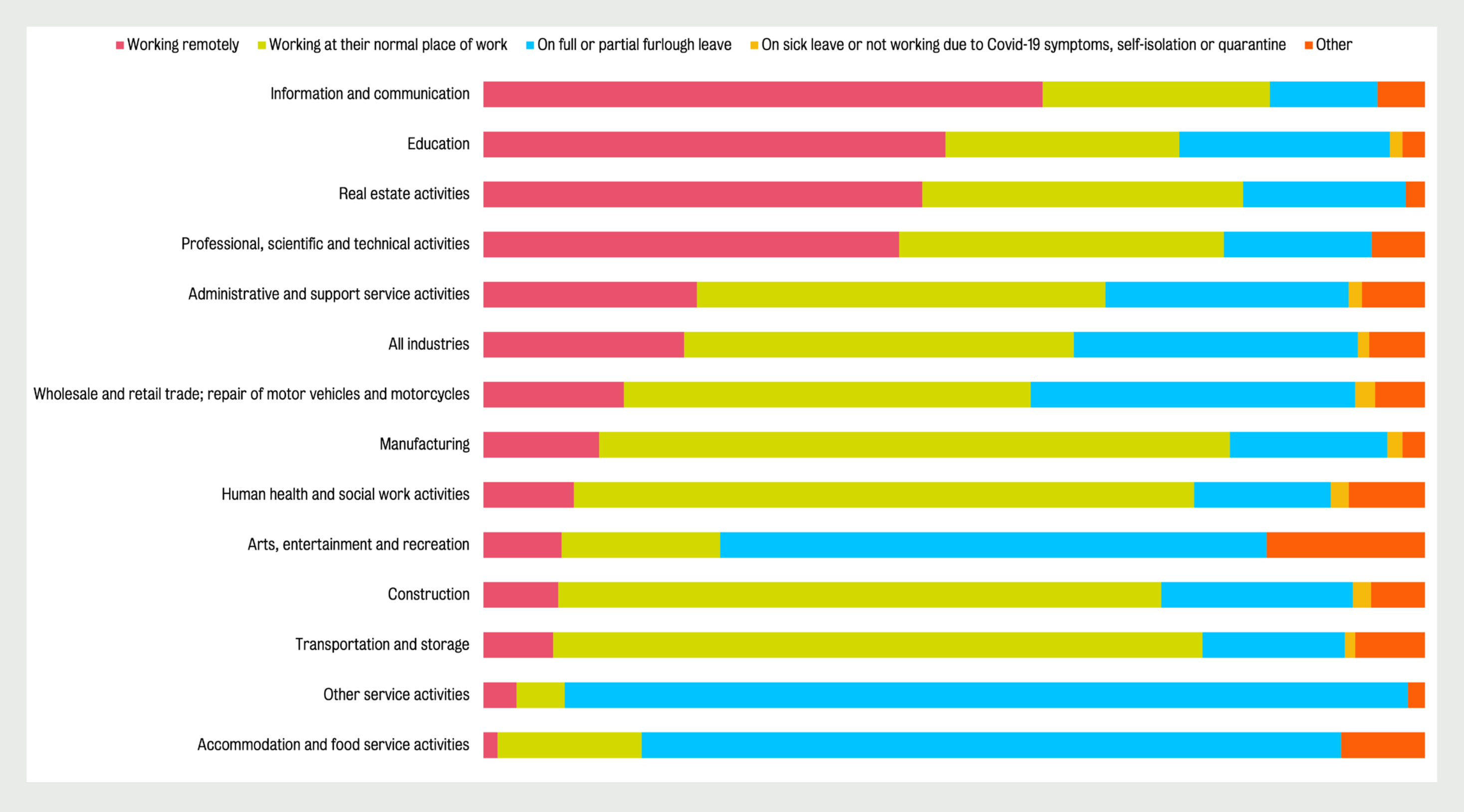
SIC 2007	London (%)	England (%)
Managers, Directors, and Senior Officials	13	11
Professional Occupations	31	24
Associate Professional Occupations	19	15
Administrative & Secretarial	10	10
Skilled Trades Occupations	5	9
Caring, Leisure and Other Service Occupations	7	9
Sales and Customer Service Occupations	6	7
Process Plant & Machine Operatives	3	5
Elementary Occupations	7	10

Source: Own elaboration based on APS data.

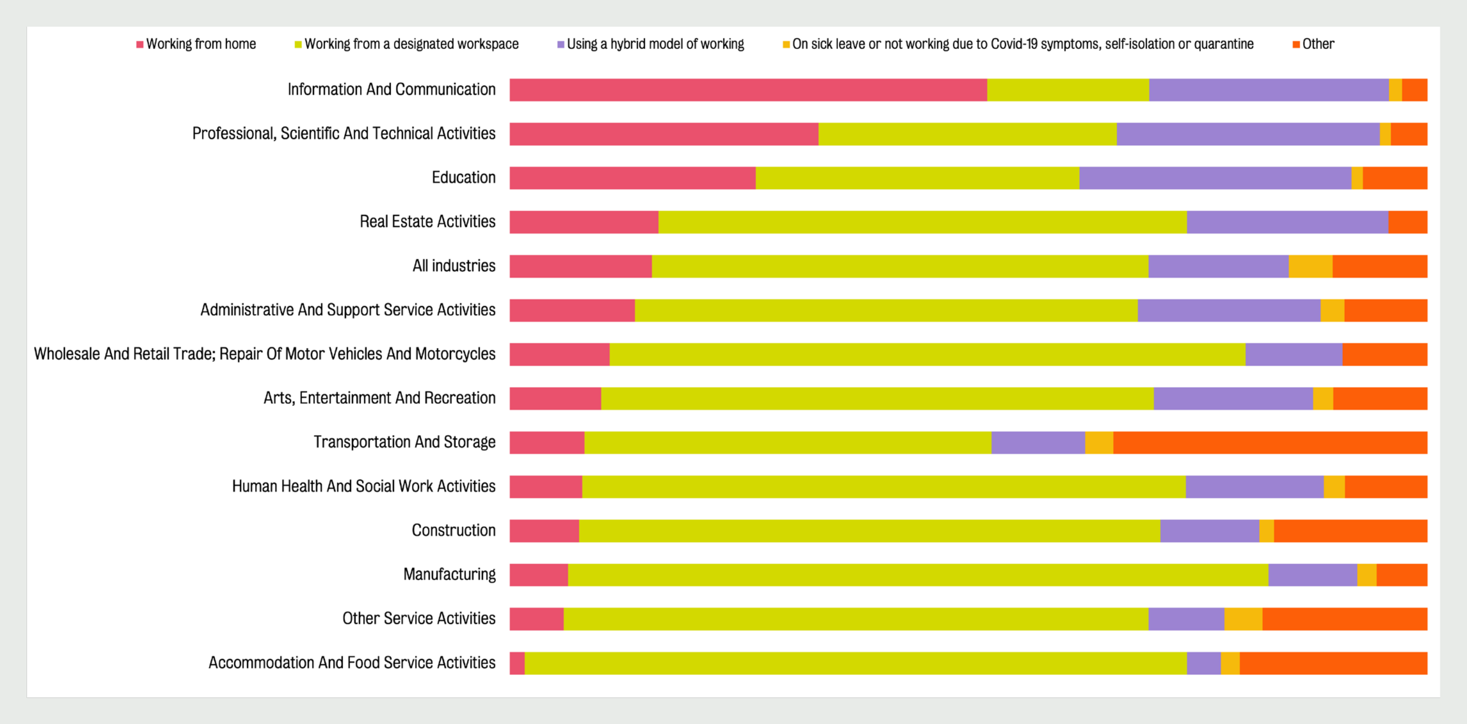
ONS surveys have shown that remote working has been concentrated in some industries and occupations, though ONS analysis of the 2020 APS suggests that industry mix only explains some of the difference between London and other regions. Graph 6 below shows the distribution of homeworking by sector in January 2021 and January 2022. Sectors such as "Professional, Scientific and Technical Activities", and "Information and Communication" have had persistently high levels of home or hybrid working. Other service sectors more dependent on face-to-face contact – such as "Accommodation and Food", "Arts, Entertainment and Recreation" and "Other Services" (which includes retail) – have had lower levels of working from home but high levels of furlough in 2021, although, interestingly, hybrid working has also grown to some degree in these sectors.

GRAPH 5: WORKFORCE BEHAVIOUR IN ENGLAND BY INDUSTRIES. REFERENCE PERIODS FROM 11 TO 24 JANUARY 2021 (JANUARY 2021), WHEN THE FURLOUGH SCHEME WAS STILL IN PLACE, AND FROM 10 TO 23 JANUARY 2022 (JANUARY 2022), WHEN THE FURLOUGH SCHEME HAD ENDED [5, 6, 8]

January 2021



January 2022



Source: Own elaboration based on BICS data

8 In both reference periods, the 'Made permanently redundant' category was removed as it represented about 0 per cent of the corresponding samples.

As shown above, the industries that see the most hybrid/home-based work are also those particularly concentrated in London (Table 2) – in December 2021, London had 14 per cent of its workforce in “Professional, Scientific and Technical Activities” and 8 per cent in “Information and Communication”. In England, those industries account for 10 per cent and 5 per cent of the workforce, respectively.

The impact of London’s industry mix is likely compounded by the occupational structure of the workforce. During 2020, the APS highlighted that the largest proportion of home-based work in the UK was concentrated in managerial, professional and technical occupations. For instance, 41 per cent of workers in “Professional Occupations” reported doing work from home in the week surveyed, versus 8 per cent of workers in “Skilled Trades Occupations” and 12 per cent in “Sales and Customer Service Occupations”.

TABLE 4: PROPORTION DOING ANY WORK AT HOME IN THE UK, BY OCCUPATION (JANUARY – DECEMBER 2020)

Occupation	UK (%)
Managers, Directors, and Senior Officials	39
Professional Occupations	41
Associate Professional and Technical Occupations	40
Administrative and Secretarial Occupations	33
Skilled Trades Occupations	8
Caring, Leisure and Other Service Occupations	7
Sales and Customer Service Occupations	12
Process, Plant and Machine Operatives	3
Elementary Occupations	1

Source: Own elaboration based on APS data.

London’s resident workforce is particularly concentrated in those occupations that allow a greater number of activities to be carried out remotely (see Table 3). Indeed, between January and December 2021, 13 per cent of London resident workers were in managerial, director or senior official jobs, while 31 per cent were in professional occupations and 19 per cent were in associate professional occupations. Across England, such occupations account for 11 per cent, 24 per cent, and 15 per cent of the population, respectively.

This pattern of homeworking being concentrated in certain industries and occupations has been identified elsewhere. For instance, using geographically representative surveys from the US and the UK, Adams-Prassl et al. (2022) found that workers’ ability to perform tasks from home varies considerably both across occupations and within industries. The authors found large differences between occupations and industries, correlated both between countries and survey waves – a higher proportion of tasks can be performed from home in occupations such as “Business and Financial Operations”, “Computer and Mathematical” and “Architecture and Engineering”, and in industries such as “Information and Communication”, “Financial and Insurance Activities”, and “Administrative and Support Services” (p. 9).

The study also found that the proportion of workers who can perform all tasks from home has increased most in occupations where the pre-existing percentage was already high, ie in occupations where an environment was already conducive to carrying out an important level of activity remotely. As set out above, APS data for 2019 showed that homeworking was significantly more common in London than in the rest of the country before the pandemic.

Finally, the study shows the significance of educational status, as respondents with degrees reported being able to perform significantly more tasks from home in almost all occupations and industries (p. 9). London stands out in this respect too: 59 per cent of its working age population are educated to university level, compared to 43 per cent across England, according to APS data.

Alongside the over-representation of occupations and industries where home or hybrid-working is possible, uptake may also be driven by factors that make it more appealing. London’s residents and commuters typically spend more of their day commuting than workers outside the capital. Labour Force Survey data for London boroughs showed an average commute time of 39 minutes in 2016, compared to 28 minutes for other English local authorities. According to the results of the first Work/Place survey, among the London workers who reported having experienced positive impacts from working from home (79 per cent), avoiding commuting is seen as the top benefit (80 per cent).

The Covid-19 pandemic and government policy responses have precipitated nationwide changes in working habits. Our analysis shows that these have been particularly widespread in London, reflecting the make-up of London’s economy and workforce.

Conclusions

Different sources of labour data – or proxies for them – have played an important role in tracking labour dynamics in London during the pandemic. However, it is important to consider the different scopes and methods adopted for each of these data sources. Certainly, analysis based on information collected directly from workers may differ significantly from analysis based on employers' estimates, and surveys that only look at some industries and types of organisation can only give a partial picture. Also, the dates on which data are collected reflect changing context, such as phases of more or less restrictive government policy or advice in response to the pandemic, or higher/lower levels of Covid-19 cases, as well as more structural shifts in behaviour.

That said, while London's work dynamics have been shaped by waves of coronavirus infection, as well as the implementation of different lockdowns and restrictions by government, since 2020, the characteristics of London's main industries and its workforce have also played a significant role in driving greater take-up of home-based and hybrid working in the capital.

Surveys suggest that higher levels of homeworking may persist in the capital. According to BICS data, in the first half of April 2022, 46 per cent of London businesses indicated that they would use homeworking as a permanent business model (32 per cent in England). When asked for reasons, the most relevant factors were "Improved staff wellbeing" (82 per cent), "Increased productivity" (44 per cent), and the "Ability to recruit from a wider geographical pool in the UK" (43 per cent). For its part, the results of the first Work/Place survey revealed that 73 per cent of London workers surveyed think we will never return to the previous way of working where most people came into their workplace five or more days a week. The perceived benefits of remote working seem to be the biggest reason for this view: 79 per cent of London workers who work from home reported experiencing positive impacts from working this way, with avoiding commuting and the ability to manage home/social responsibilities as the top benefits, and 84 per cent reported that working from home is better for quality of life and feeling in control.

The pandemic has certainly accelerated changes in how and where "office-based" jobs are carried out, and it appears that we are entering a period of continuing change and experimentation. The relatively swifter return to London for leisure purposes suggests that it is longer-term changes, rather than short-terms concerns about infection, that are sustaining hybrid- and homeworking – for those who have a choice. Workers' and employers' preferences will continue to shape behaviour. However, it is likely that the specific characteristics of jobs – including their location, occupation, and industry – will continue to play an important role in influencing how far hybrid- or homeworking is adopted.

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