



# Embracing the “new normal”?

## How London is living with hybrid working



November 2022

**Work/Place**  
London returning



## Executive summary

As hybrid working becomes a feature of everyday life for so many people post-pandemic, the Policy Institute and King's Business School carried out a representative survey of 2,030 London workers aged 16+, between 23 June and 12 July 2022, to explore why people largely feel so positive about this shift, as well as perceptions of how employers are reacting to it.

The study is part of a joint programme of activities and research called **Work/Place: London returning**. It reveals the following key findings:

**There are clear trade-offs to new ways of working: it's largely seen as easier to avoid awkward social interactions and conflict with colleagues when working remotely, but harder to build a rapport with them**

- Among London workers who work from home at least one day a week, seven in 10 (70%) feel remote working has made it easier to avoid awkward social interactions with colleagues, and half (51%) feel it's easier to avoid conflict with co-workers. But on the other hand, a majority (55%) also say they find it harder to build a rapport with colleagues when working virtually rather than in person.

**It's often suggested that remote working will be detrimental to young people's careers, but young people themselves are much more likely to say it makes it easier for them to ask questions on things they're unsure about and to put themselves forward for important tasks**

Among London workers who work from home at least one day a week:

- 40% of those aged 16 to 24 say it's easier to put themselves forward for important tasks when working with colleagues remotely rather than

in-person – compared with 25% of 25- to 49-year-olds and 13% of those aged 50 and above who say the same.

- 45% of those aged 16 to 24 say remote working has made it easier for them to ask questions on things they're unsure about – roughly double the proportion of 25- to 49-year-olds (24%) and three times the proportion of those aged 50 and above (14%) who also feel this way.
- 8% of those aged 50+ say remote working makes it easier to build rapport with colleagues, but this rises to 21% among 16- to 24-year-olds.

**More generally, many London workers feel like they have benefitted from changes to the world of work, with those who can work remotely most likely to say they feel better able to do their job than they did pre-pandemic**

- Four in 10 (41%) London workers feel they are now better able to do their job well than they were before the pandemic began, while half (50%) say there has been little change and one in 10 (10%) feel less able.
- Around half (47%) of hybrid workers and those who work from home all of the time (53%) say they now feel better equipped to perform well in their job – more than double the proportion (21%) who feel this way among those who commute to their workplace in the capital every day of the week.

## Executive summary

**Most London workers report a greater sense of freedom at work compared with pre-Covid – but people's positivity about working from home is driven more by practical benefits such as saving money or avoiding commuting**

- 53% say they feel a greater sense of freedom at work now than they did before the pandemic – only 7% say they have lost freedom, while 37% say their freedom has stayed about the same.
- Hybrid (63%) and home-only (60%) workers are more than twice as likely to report a greater sense of freedom than those who are in their workplace five or more days a week (24%).
- Eight in 10 (82%) London workers who feel positive about working from home say it has increased their level of control over their work-life balance, including five in 10 (52%) who say it has *greatly* increased it.
- 63% of those who feel positive about working from home say practical benefits, such as avoiding commuting or saving money, are the key aspects they value, compared with 33% who cite the freedom and control it gives them in their working life.
- In line with this finding, six in 10 (60%) London workers think that allowing people to commute at times that would be easier or cheaper for them would encourage people to return to their workplaces in the capital – the top answer given, along with offering flexible or hybrid working options (58%).

**Remote working may have also opened up new possibilities in terms of where London workers choose to live, with a notable minority of those with homes in the capital saying it has made them more likely to move away**

- Four in 10 (39%) of those who live in London and work from home say they are more likely to leave the capital because of the increased flexibility offered by remote working.
- Among those who say they are now more likely to leave the capital, four in 10 (43%) cite having more space as a key reason – the top answer given. Other reasons given are the reduced cost of living (22%) and living somewhere less busy (12%).

**Most say they'd go as far as looking for a new job if their employer made them follow a work pattern they didn't like – but most also have no problem going into their workplace for specific tasks or events**

- 65% of London workers in organisations of two or more people say they would look for a new job if their employer made them follow a work pattern they didn't, while 9% say they wouldn't.
- However, those who work from home at least a day a week *are* generally willing to travel to their workplace for a specific task or event, such as a presentation or client meeting. Six in 10 (59%) say they'd feel positive about doing so, compared with around one in 10 (11%) who say they'd feel negative.

## Executive summary

**Employers are generally trusted to be considerate and fair when deciding work patterns, while compromise between employer and employee preferences is ultimately seen as the most likely way forward long-term**

Among London workers in organisations of two or more employees:

- Most trust their employers to keep their wellbeing in mind (58%), treat people fairly (57%) and keep their promises (53%) when planning employees' return to their workplace or making decisions about future working patterns.
- Around half (47%) feel future working patterns in the capital will be decided through a compromise between employee and employer preferences. This compares with a quarter (26%) who think it will mainly be employers that decide, and a fifth (20%) who say employees will have most responsibility for such decisions.

Note: Throughout this report, some figures described may differ from those shown on charts. This is due to rounding.

Figures for Conservative/Labour are based on 2019 general election vote.

For sizes of subgroups described, see the survey details section at the end of this report.



**There are clear trade-offs to new ways of working: it's largely seen as easier to avoid awkward social interactions and conflict with colleagues when working remotely, but harder to build a rapport with them**

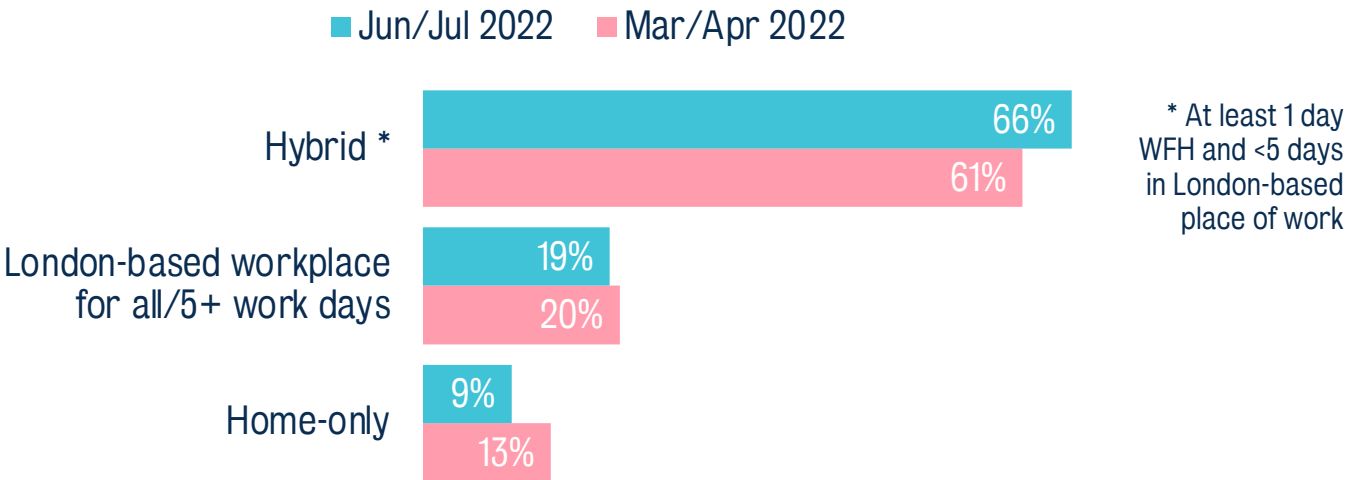


# Two-thirds of London workers are now hybrid, with Mondays and Fridays least popular for going into workplaces

66% of those with a place of work in London now split their working hours between home and their workplace. And while there has been a slight shift from home-only to hybrid working between March/April and June/July, work patterns have changed little during that time.

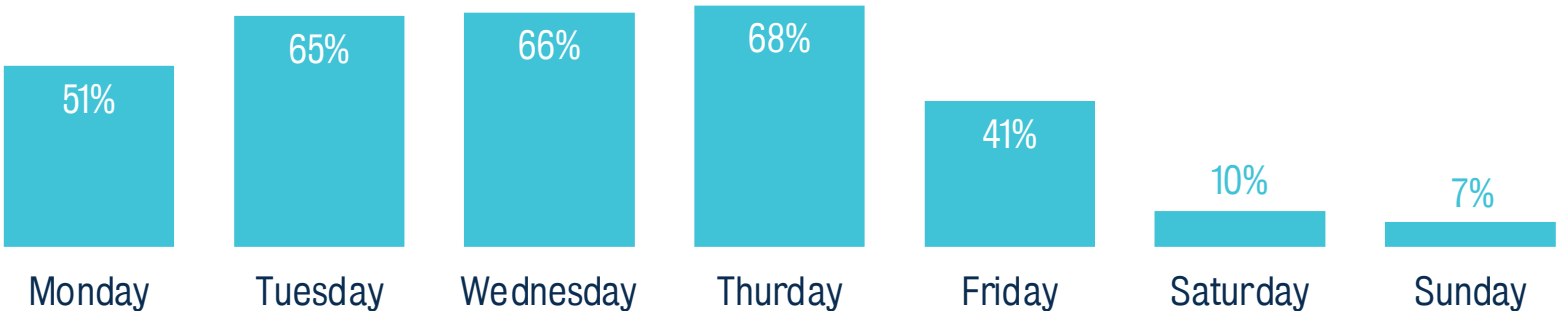
Most who commute at least once a week do so on Tuesdays (65%), Wednesdays (66%) and Thursdays (68%), with Mondays (51%) and Fridays (41%) being comparatively less popular.

Within the past 4 weeks, on average how many days per week did you work from the following locations? Your usual London-based place of work (eg an office, retail or hospitality outlet or worksite) / your home / any other London-based location



Base: 2,030 London workers aged 16+, surveyed online by YouGov, 23 Jun–12 Jul 2022, and 2,015 surveyed 25 Mar–13 Apr 2022

Which days of the week do you typically work from your London-based place of work? Please select all that apply

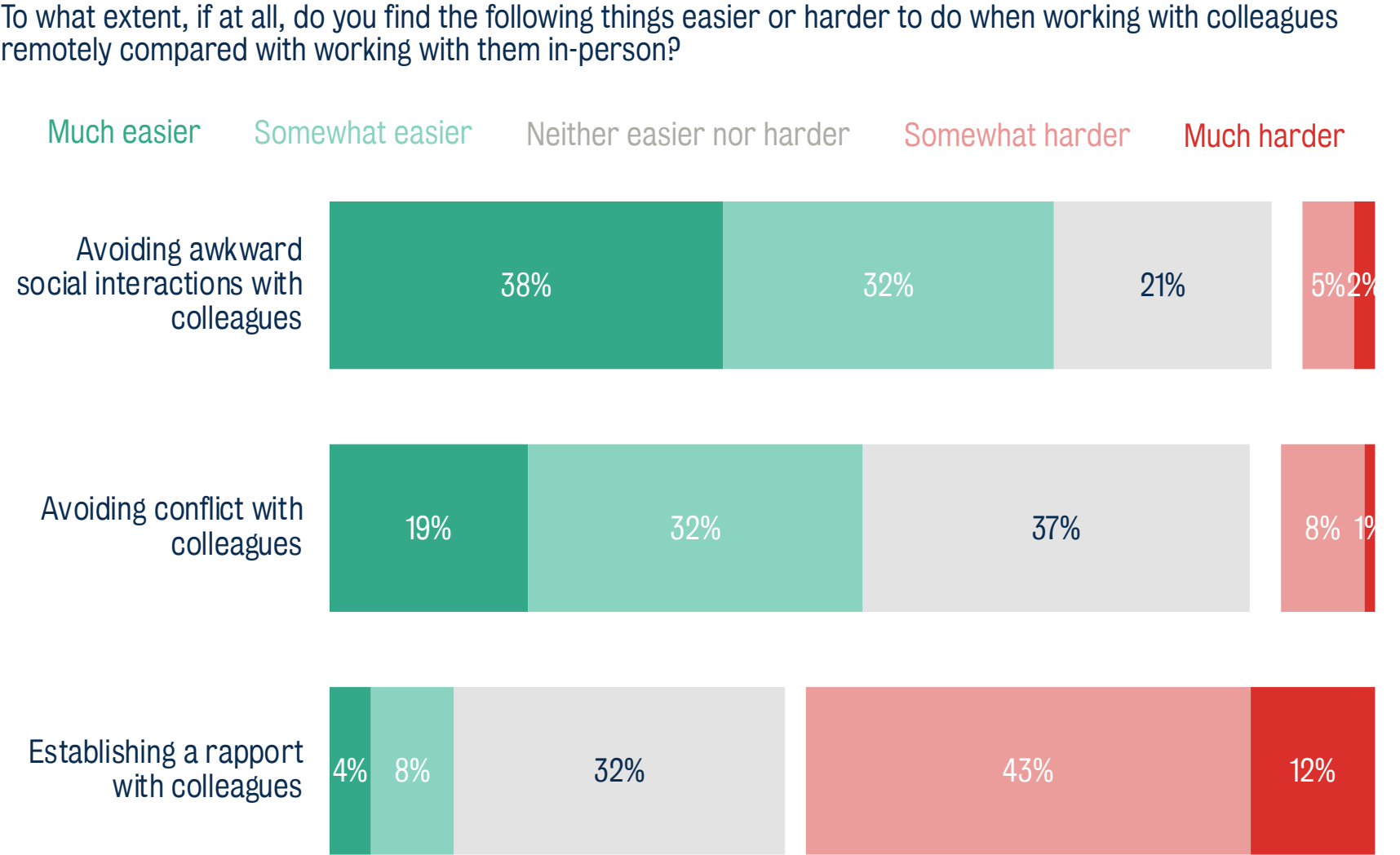


Base: 1,806 London workers aged 16+ who work from their organisation's London workplace at least one day a week, surveyed online by YouGov, 23 Jun–12 Jul 2022

# Avoiding awkwardness and conflict with colleagues are seen as easier with remote working, while establishing a rapport is viewed as harder

Among London workers who work from home at least one day a week, seven in 10 (70%) feel remote working has made it easier to avoid awkward social interactions with colleagues, and half (51%) feel it's easier to avoid conflict with co-workers

But on the other hand, a majority (55%) also say they find it harder to build a rapport with colleagues when working virtually rather than in person. This compares with a third (32%) who think remote working makes no difference to building a rapport, and 12% who have found this easier while being remote.



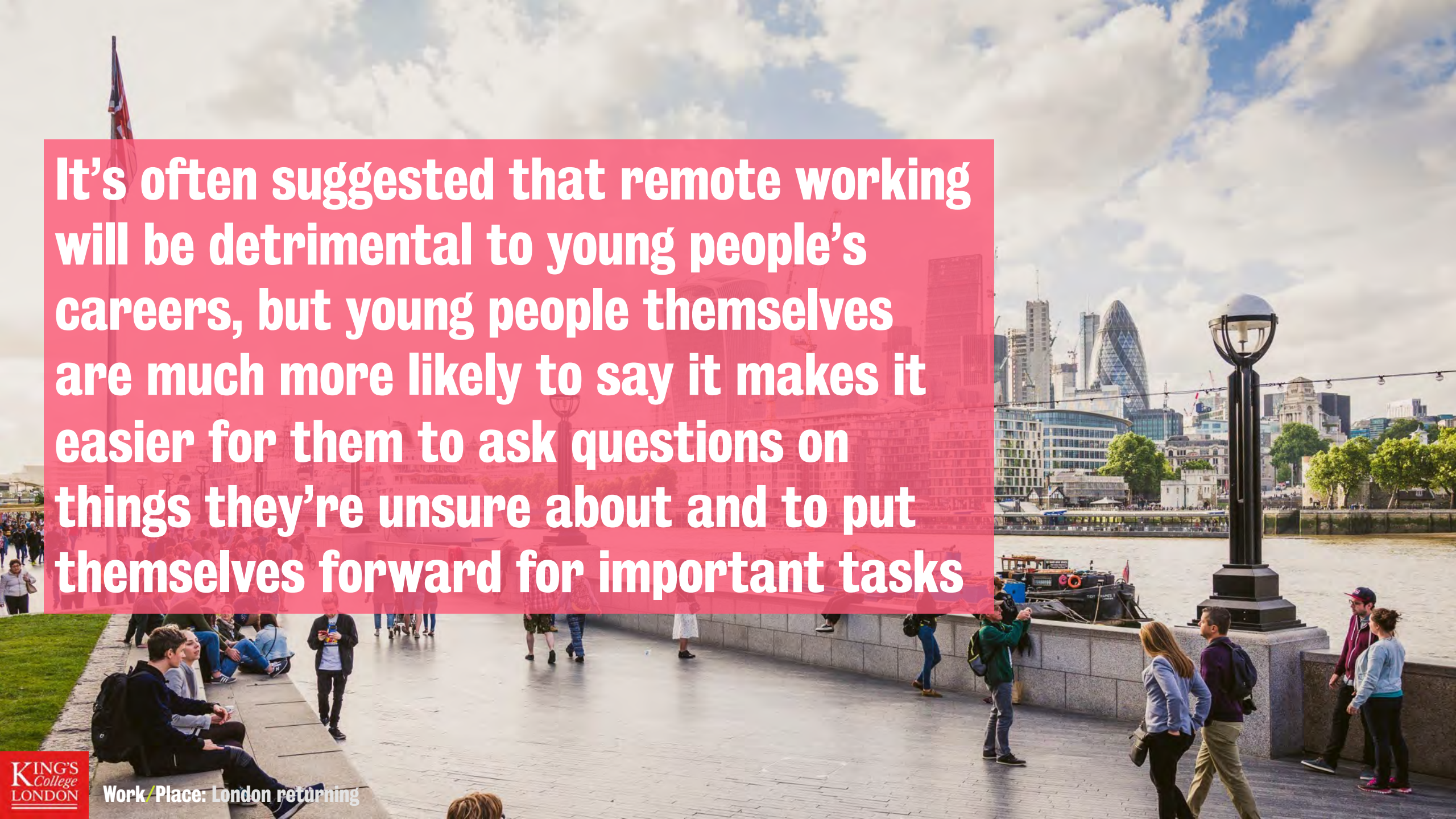
# On other aspects of work life, people are most likely to say remote working has made little difference

More than half (55%) of London workers who work from home a day a week or more say doing so has made it neither easier nor harder for them to be honest with colleagues, compared with close to three in 10 (28%) who say it has made this easier and one in seven (15%) who say harder.

Similarly, half (54%) of this group say remote working hasn't affected whether they put themselves forward for important tasks at work, and a similar proportion (45%) say it's not made a difference to whether they ask questions on things they're unsure about.







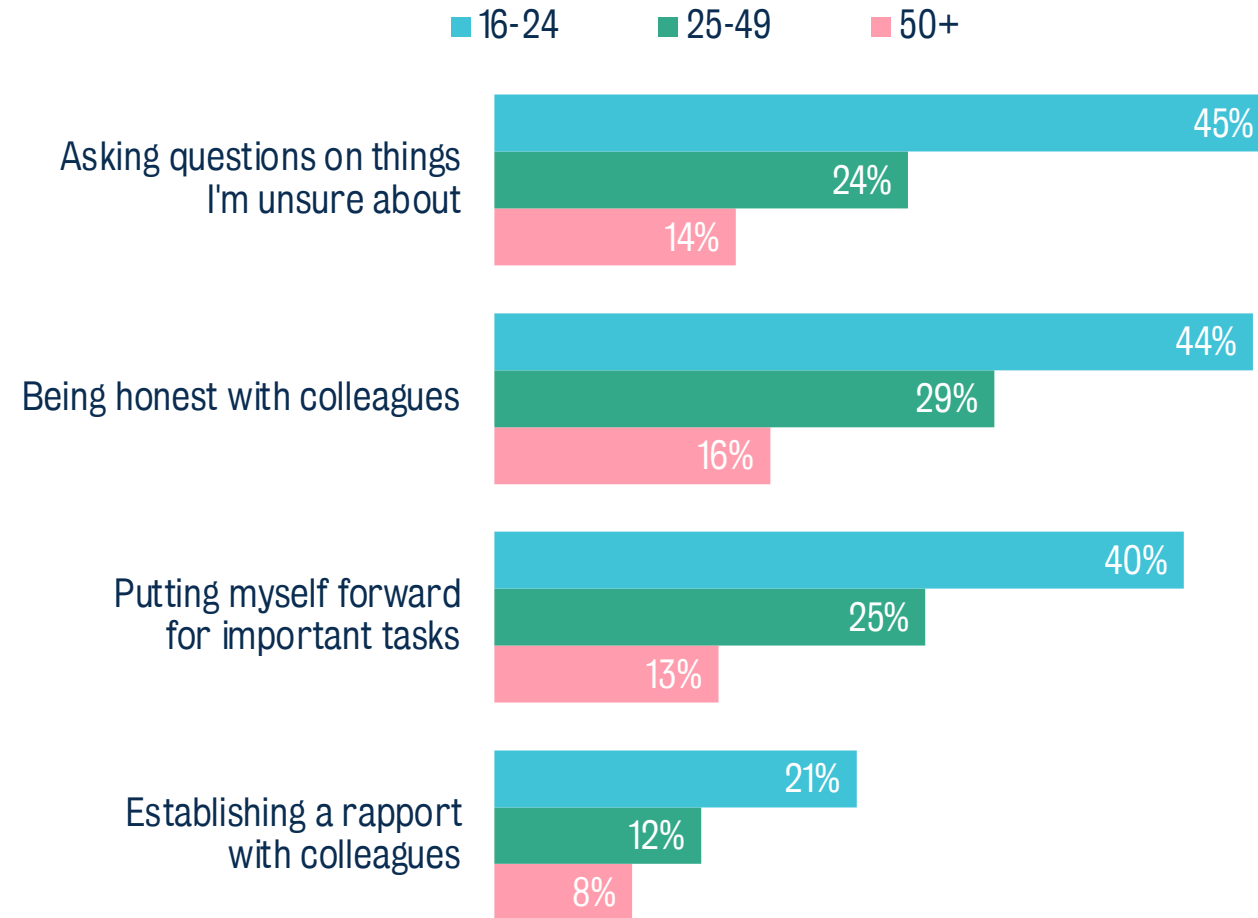
**It's often suggested that remote working will be detrimental to young people's careers, but young people themselves are much more likely to say it makes it easier for them to ask questions on things they're unsure about and to put themselves forward for important tasks**

# Younger people are much more likely to say remote working has made certain aspects of work life easier for them

There are considerable age differences in experiences of new ways of working. For example, among London workers who work from home at least one day a week:

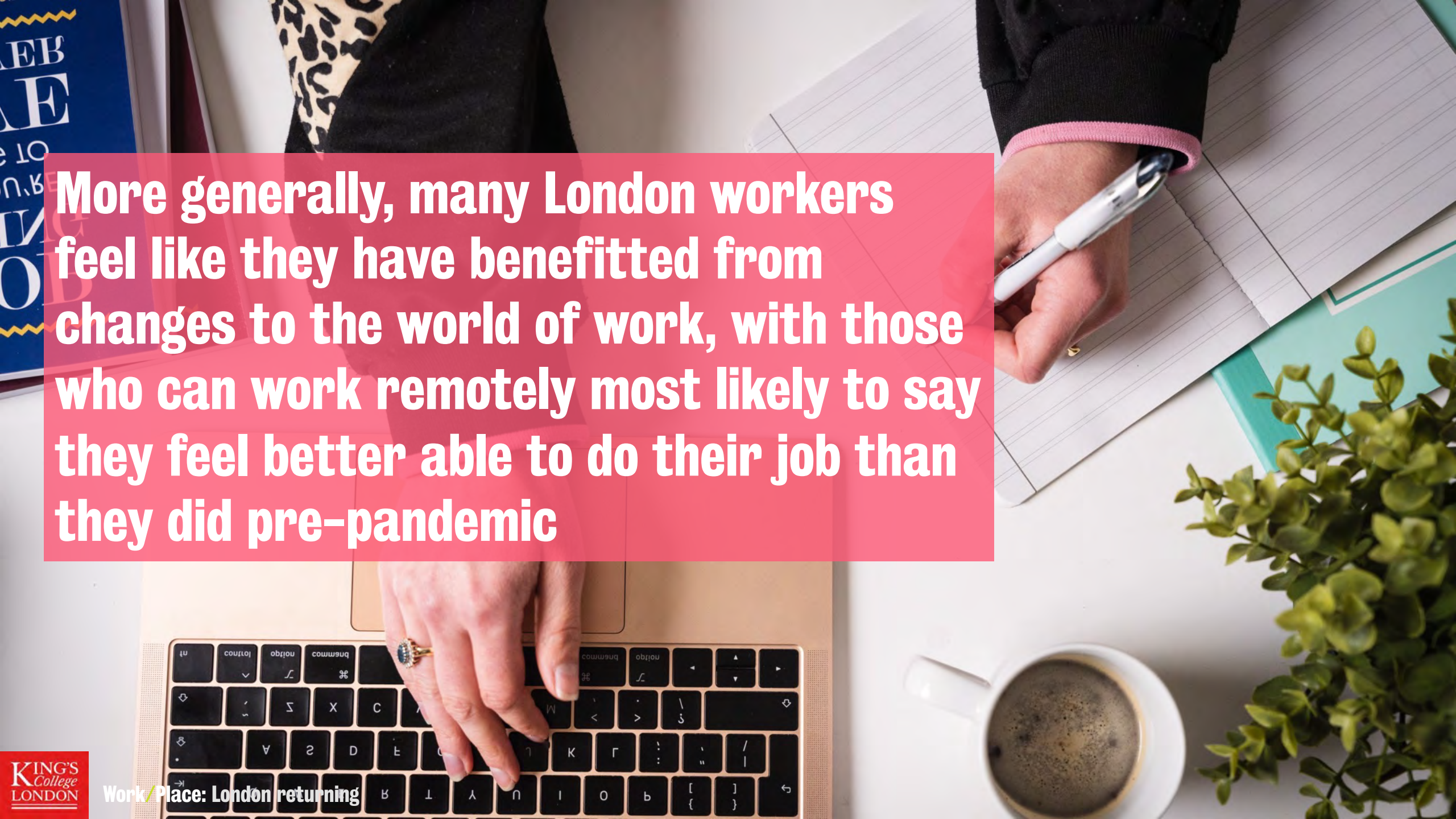
- 40% of those aged 16 to 24 say it's easier to put themselves forward for important tasks when working with colleagues remotely rather than in-person – compared with 25% of 25- to 49-year-olds and 13% of those aged 50 and above who say the same.
- Similarly, 45% of those aged 16 to 24 say remote working has made it easier for them to ask questions on things they're unsure about – roughly double the proportion of 25- to 49-year-olds (24%) and three times the proportion of those aged 50 and above (14%) who also feel this way.
- 8% of those aged 50+ say remote working makes it easier to build rapport with colleagues, but this rises to 21% among 16- to 24-year-olds.

To what extent, if at all, do you find the following things easier or harder to do when working with colleagues remotely compared with working with them in-person? % who say much easier/easier, by age



Base: 1,567 London workers aged 16+ who work from home at least one day a week, surveyed online by YouGov, 23 Jun–12 Jul 2022  
(16-24: 101; 25-49: 1,127; 50+: 339)





**More generally, many London workers feel like they have benefitted from changes to the world of work, with those who can work remotely most likely to say they feel better able to do their job than they did pre-pandemic**



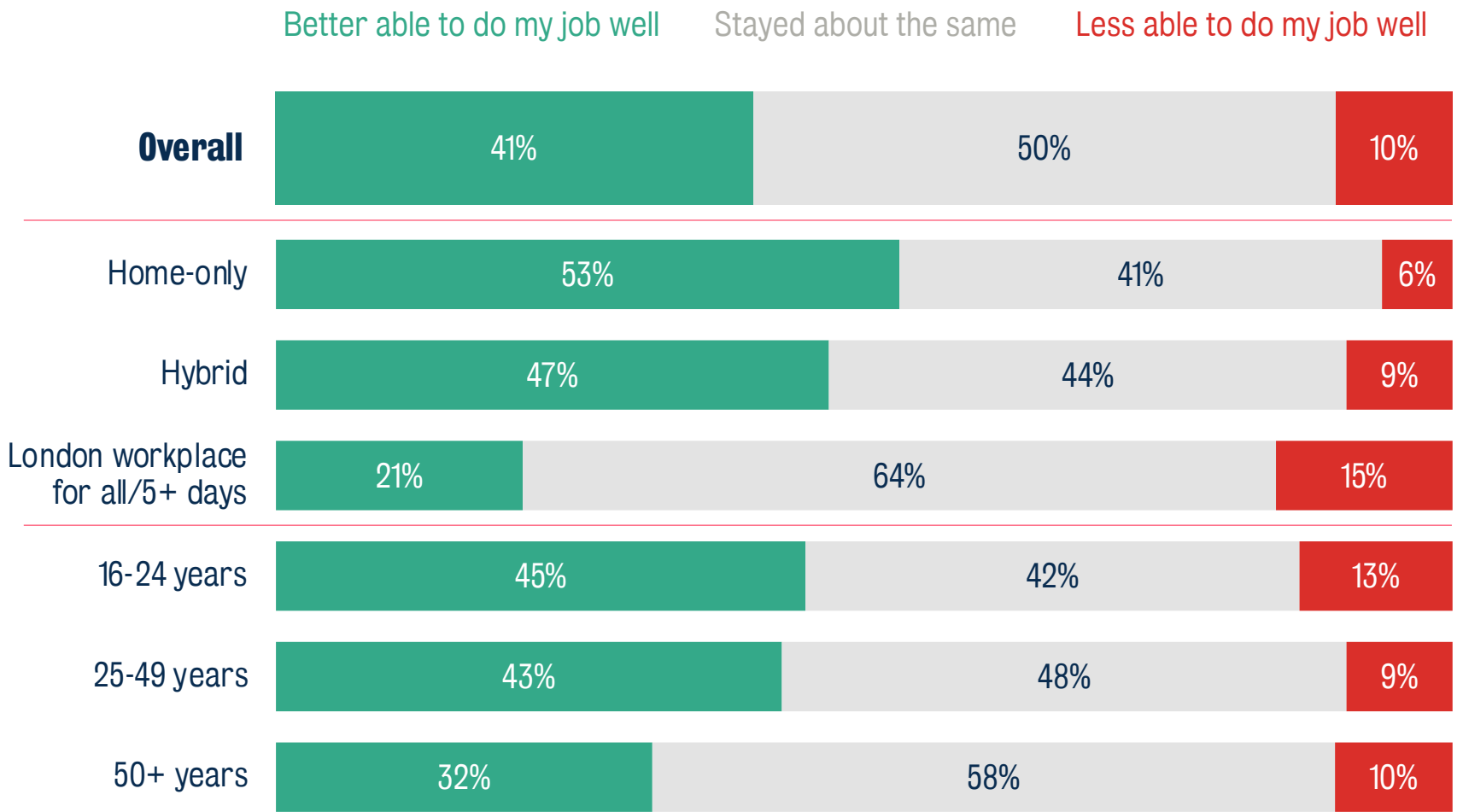
# Hybrid and home-workers are more than twice as likely as those who commute every day to say they're better able to do their job than they were before Covid

Four in 10 (41%) London workers feel they are now better able to do their job well than they were before the pandemic began, while half (50%) say there has been little change and one in 10 (10%) feel less able to do their job well.

Around half of both those who work from home all of the time (53%) and hybrid workers (47%) now feel better equipped to perform well in their job – more than double the proportion (21%) who feel this way among those who commute to their workplace in the capital every day of the week.

And across age groups, younger workers are more likely to report a positive change in their job performance than older workers.

Compared with your work situation before the Covid-19 pandemic began, do you feel you are now better able to do your job well, less able to do your job well, or it has stayed about the same?



Base: 2,030 London workers aged 16+, surveyed online by YouGov, 23 Jun–12 Jul 2022 (Home: 176; hybrid: 1,333; London workplace: 389; 16-24: 128; 25-49: 1,373; 50+: 529)

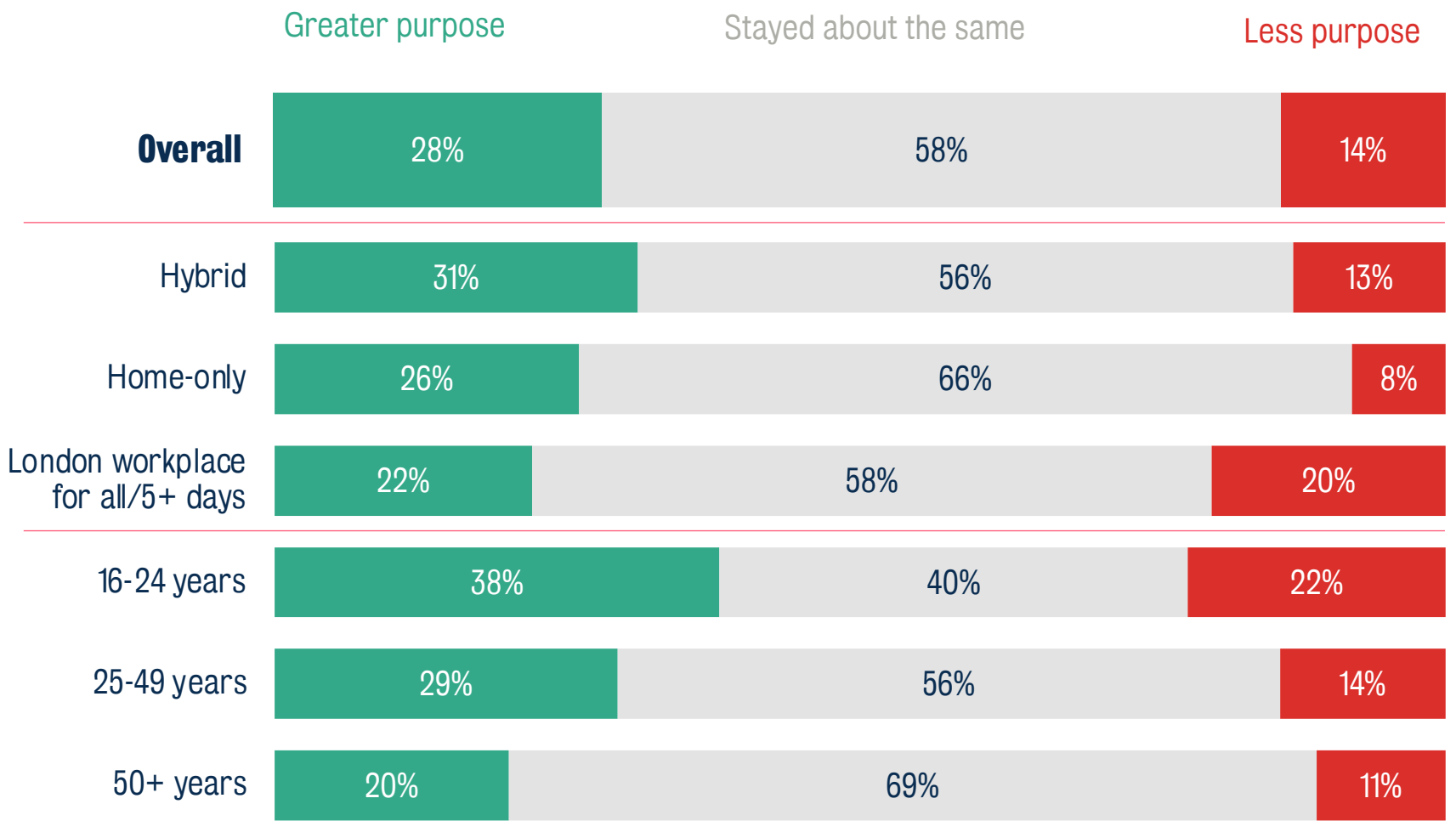
But when it comes to people’s sense of purpose at work now compared with pre-Covid, there is less difference between those who can work remotely and those who don’t – though views vary more by age

Three in 10 (28%) London workers report feeling a greater sense of purpose at work now compared with before the pandemic began – double the proportion who say they feel less sense of purpose (14%). But the most common response, by a majority of six in 10 (58%), is that there has been hardly any change in how people feel.

There is relatively little difference in experiences among those who work remotely and those who don’t. For example, 31% of hybrid workers feel a greater sense of purpose, compared with 22% of those who commute every day.

There is a bigger gap in views by age, with those aged 16 to 24 (38%) around twice as likely to feel a greater sense of purpose than those aged 50+ (20%) – although the youngest age group is also twice as likely as the oldest to report feeling *less* purpose (22% vs 11%)


Compared with your work situation before the Covid-19 pandemic began, do you feel you have greater purpose at work, less purpose at work, or about the same amount of purpose?)



Base: 2,030 London workers aged 16+, surveyed online by YouGov, 23 Jun–12 Jul 2022 (Home: 176; hybrid: 1,333; London workplace: 389; 16-24: 128; 25-49: 1,373; 50+: 529)

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**Most London workers report a greater sense of freedom at work compared with pre-Covid – but people's positivity about working from home is driven more by practical benefits such as saving money or avoiding commuting**

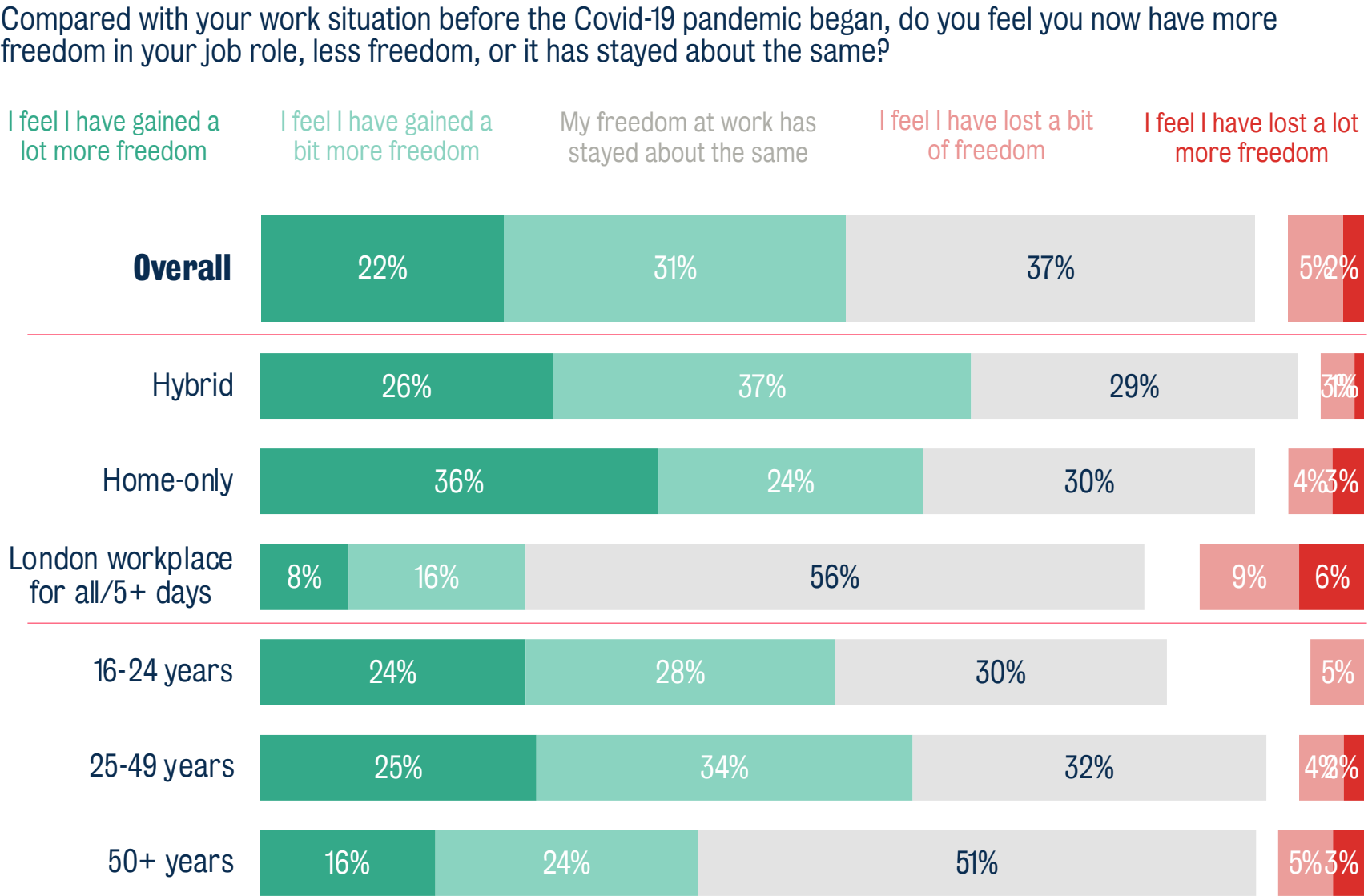


# Most London workers feel a greater sense of freedom at work than they did before the pandemic

53% of London workers say they feel a greater sense of freedom at work now than they did before the pandemic – only 7% say they have lost freedom, while 37% say their freedom has stayed about the same.

Hybrid (63%) and home-only (60%) workers are more than twice as likely to report a greater sense of freedom than those who are in their workplace five or more days a week (24%).

And those aged 50+ are less likely than other age groups surveyed to say they have gained more freedom.



Base: 2,030 London workers aged 16+, surveyed online by YouGov, 23 Jun–12 Jul 2022 (Home: 176; hybrid: 1,333; London workplace: 389; 16-24: 128; 25-49: 1,373; 50+: 529)

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# A large majority of those who feel positive about working from home say it has given them more control over their work-life balance

Eight in 10 (82%) London workers who feel positive about working from home say it has increased their level of control over their work-life balance, including five in 10 (52%) who say it has *greatly* increased it. Only 4% say their sense of control has decreased.

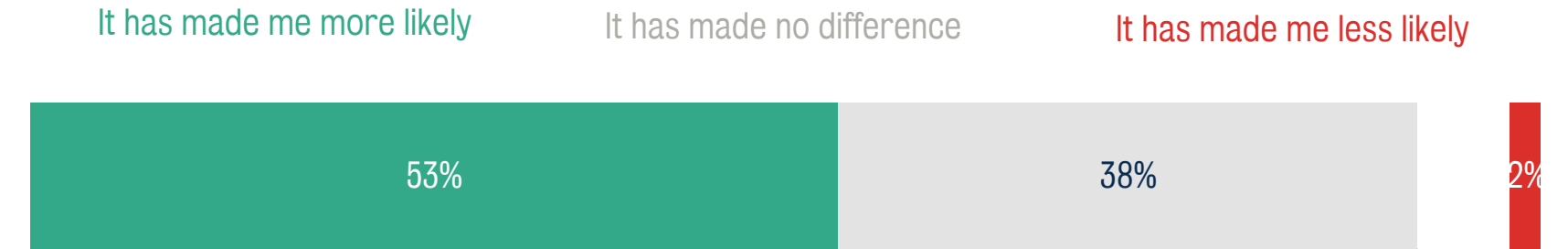
And around half (53%) of those who work from home at least one day a week say this experience has made them more likely to request control of their working arrangements from their employer, while 38% say it has made no difference and 2% say it has made them less likely to request greater control.

Compared with before the pandemic, do you feel that being able to work from home has increased or decreased your control over your work-life balance?



Base: 1,275 London workers aged 16+ who feel positive about working from home, surveyed online by YouGov, 23 Jun–12 Jul 2022

Has the experience of working from home made you more likely or less likely to request greater control over your working arrangements from your employer, or has it made no difference?



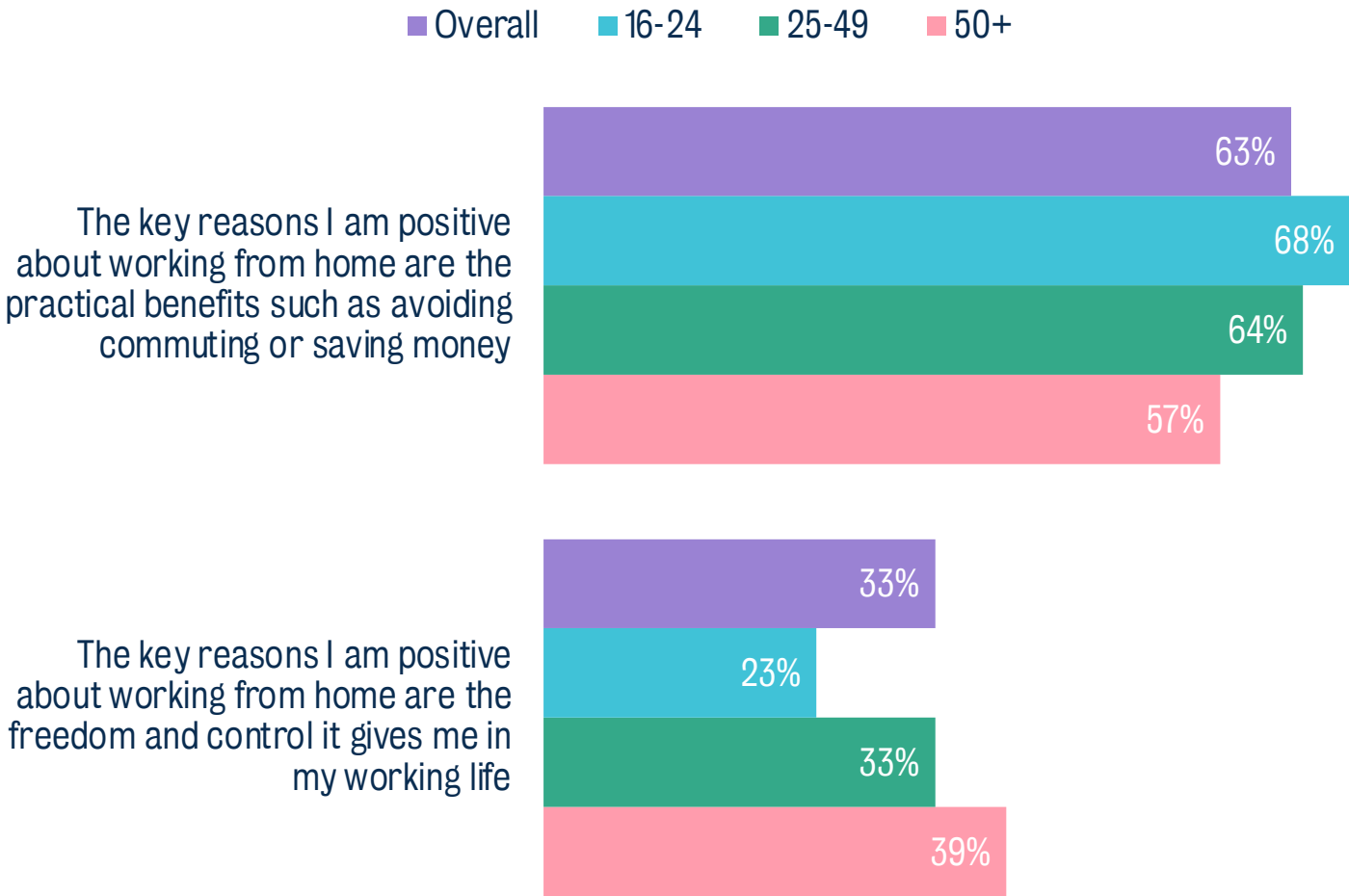
Base: 1,567 London workers aged 16+ who work from home at least one day a week, surveyed online by YouGov, 23 Jun–12 Jul 2022

# But freedom and control over ways of working are seen as less important than than the practical benefits of working from home

63% of those who feel positive about working from home say practical benefits, such as avoiding commuting or saving money, are the key reasons they are positive, compared with 33% who cite the freedom and control it gives them in their working life.

And majorities of all age groups are more inclined to say the practical benefits are key for them.

Which, if any, of the following is closest to your view?



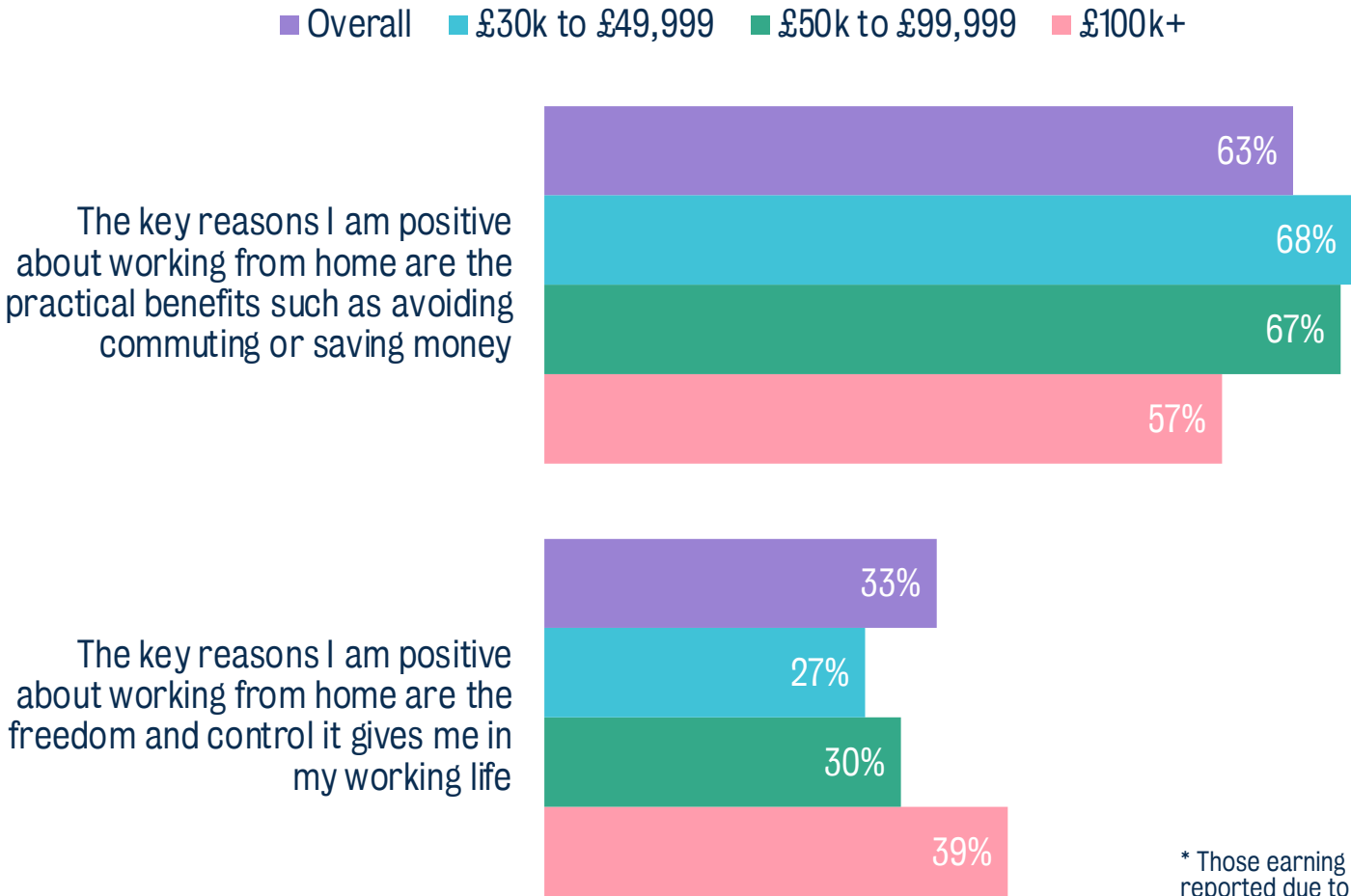


# Higher earners are more likely than lower earners to cite freedom and control as a key reason they enjoy working from home

The reasons people give for why they feel positive about working from home vary somewhat by income level.

For example, 39% of those who feel positive and earn £100k or more a year say the freedom and control that working from home gives them over their working life is a key reason they feel positive about it, compared with 27% of those earning £30k to £49,999 who say the same.

Which, if any, of the following is closest to your view?



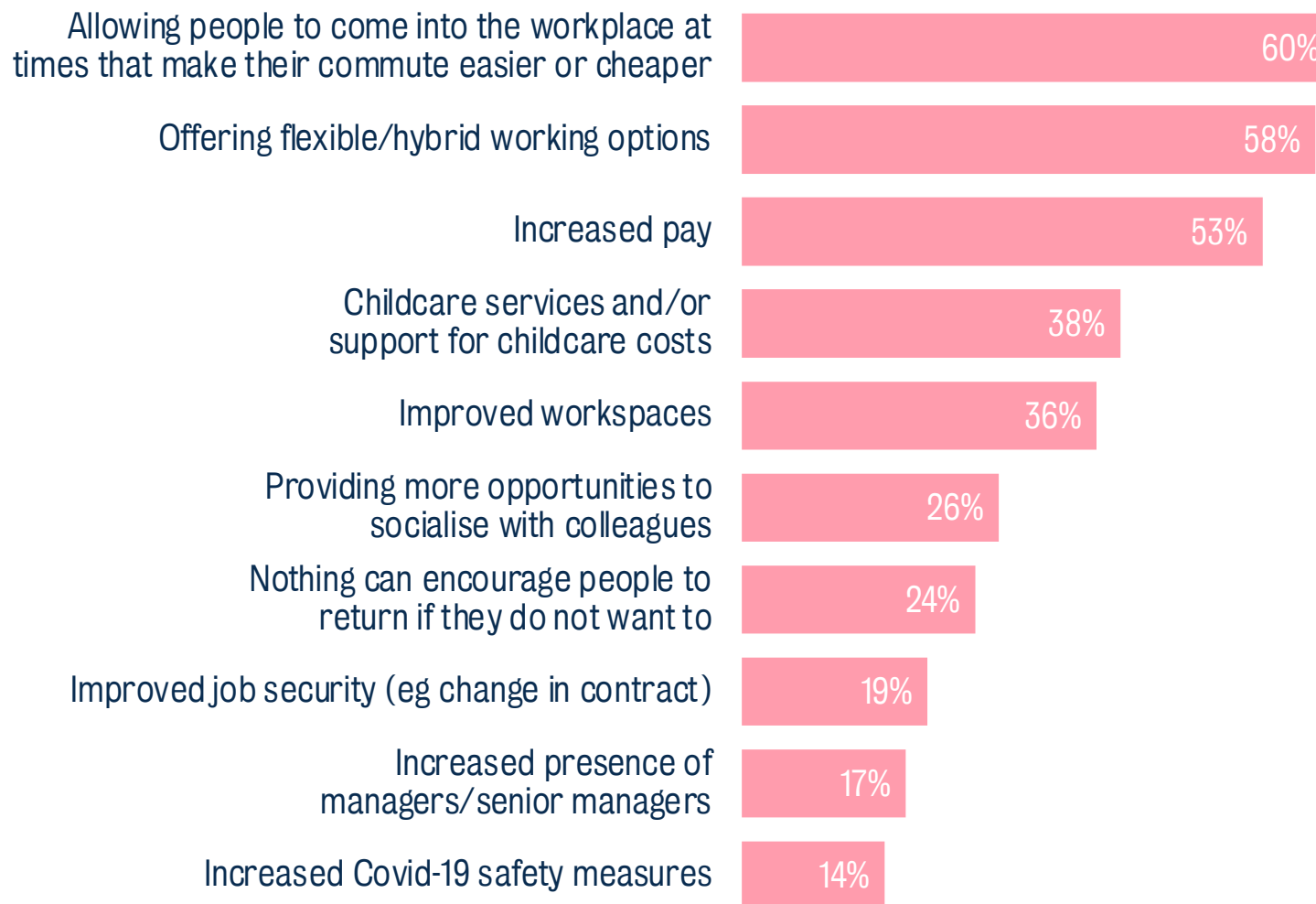
\* Those earning under £30k not reported due to small base size

## A better commute and more flexible work options are key to getting people back in the workplace

In line with the finding that people prioritise the practical benefits of new ways of working over greater freedom and control, six in 10 (60%) London workers think that allowing people to commute at times that would be easier or cheaper for them would encourage people to return to their workplaces in the capital – the top answer given, along with offering flexible or hybrid working options (58%).


Increased pay is the next most widely selected measure, selected by around half (53%), while childcare services and support (38%) and improved workspaces (36%) are cited by over a third.

In your opinion, which of the following would encourage people to return to working at their regular London workplace? Please select all that apply



Base: 2,030 London workers aged 16+, surveyed online by YouGov, 23 Jun–12 Jul 2022





**Remote working may have also opened up new possibilities in terms of where London workers choose to live, with a notable minority of those with homes in the capital saying it has made them more likely to move away**



# Many London workers say they are considering leaving the capital because of flexible working...

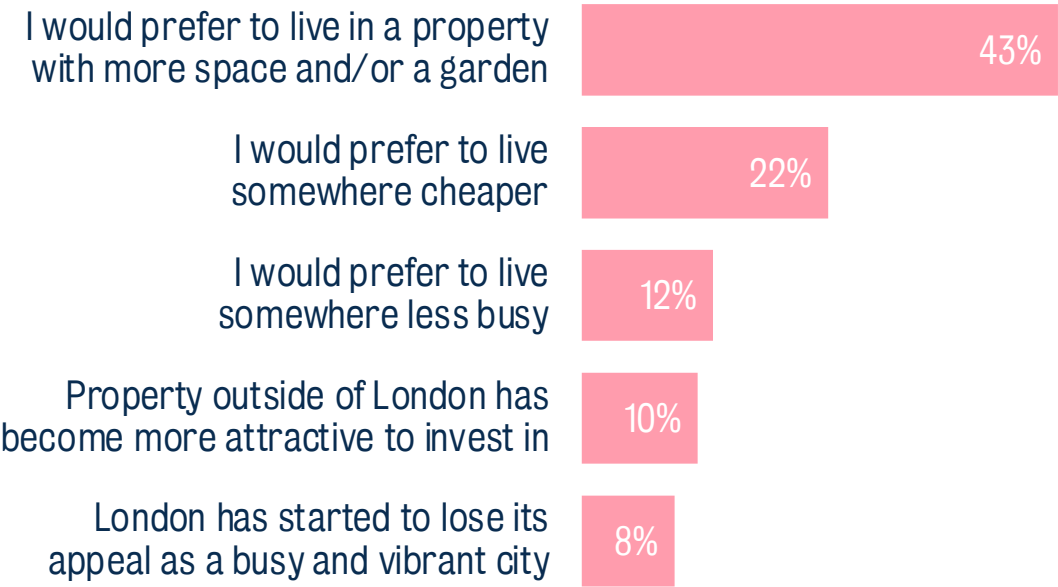
Four in 10 (39%) of those who live in London and work from home at least one day a week say they are more likely to leave the capital because of the increased flexibility offered by remote working. However, the majority (56%) say that this has not affected whether they will continue to live in London.

To what extent, if at all, has the increased availability of remote working made you more or less likely to move out of London, or has it made no difference?



Among those who say they would be more likely to leave the capital, four in 10 (43%) cite having more space as a key reason – the top answer given. Other benefits given are the reduced cost of living (22%) and living somewhere less busy (12%).

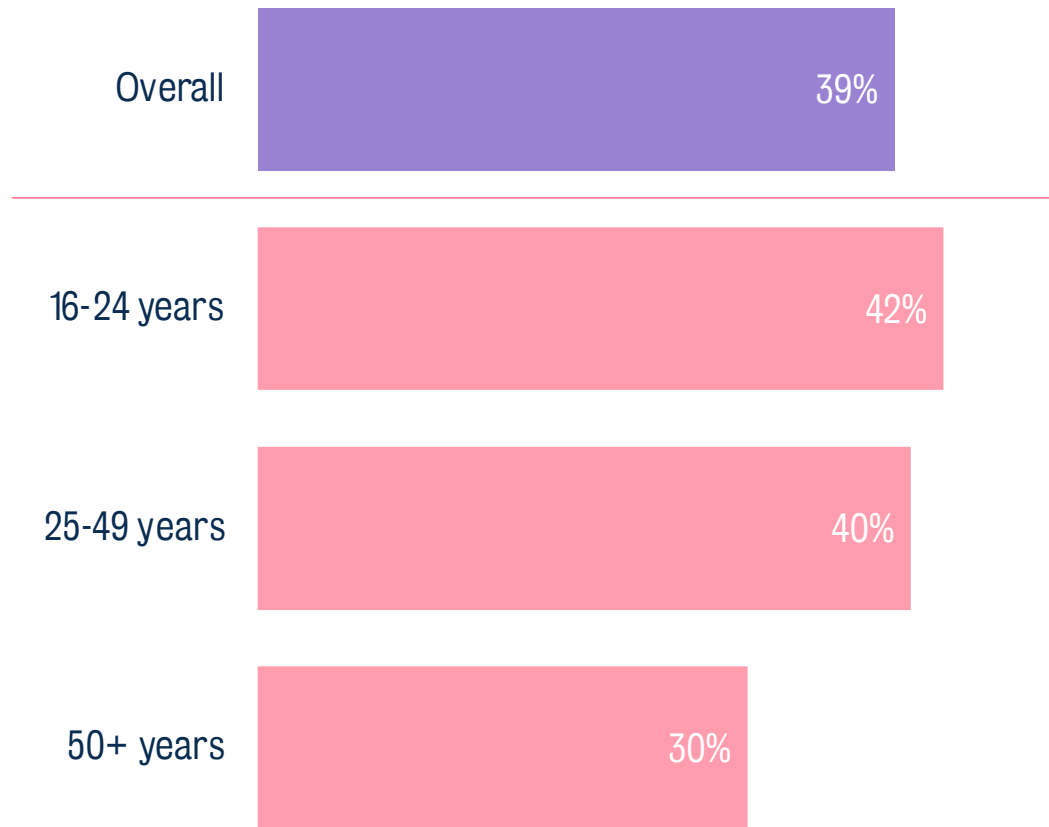
What is the main reason that this has made you more likely to move out of London?




## ...and those under 50 are most likely to say they're considering moving

Among people with a home in London who work from home, four in 10 of those aged 16 to 24 (42%) say they would consider moving out of the capital because of the increased availability of flexible working, as would a similar proportion of those aged 25 to 49 (42%). This compares with three in 10 (30%) of those aged 50 and above who say the same.

To what extent, if at all, has the increased availability of remote working made you **more or less likely to move out of London, or has it made no difference?** % who say they are a lot/somewhat more likely to move



Base: 1,204 London workers aged 16+ who live in London and work from home, surveyed online by YouGov, 23 Jun–12 Jul 2022 (16-24: 81; 25-49: 884; 50+ 239)



**Most say they'd go as far as looking for a new job if their employer made them follow a work pattern they didn't like – but most also have no problem going into their workplace for specific tasks or events**

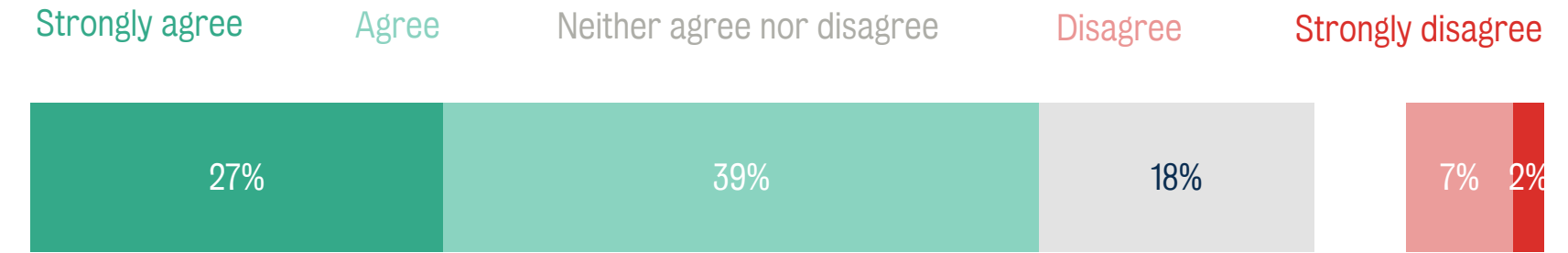
# Two-thirds say they would quit rather than follow a work pattern they didn't like

65% of London workers in organisations of two or more people say they would look for a new job if their employer made them follow a work pattern they didn't, while 9% say they wouldn't.

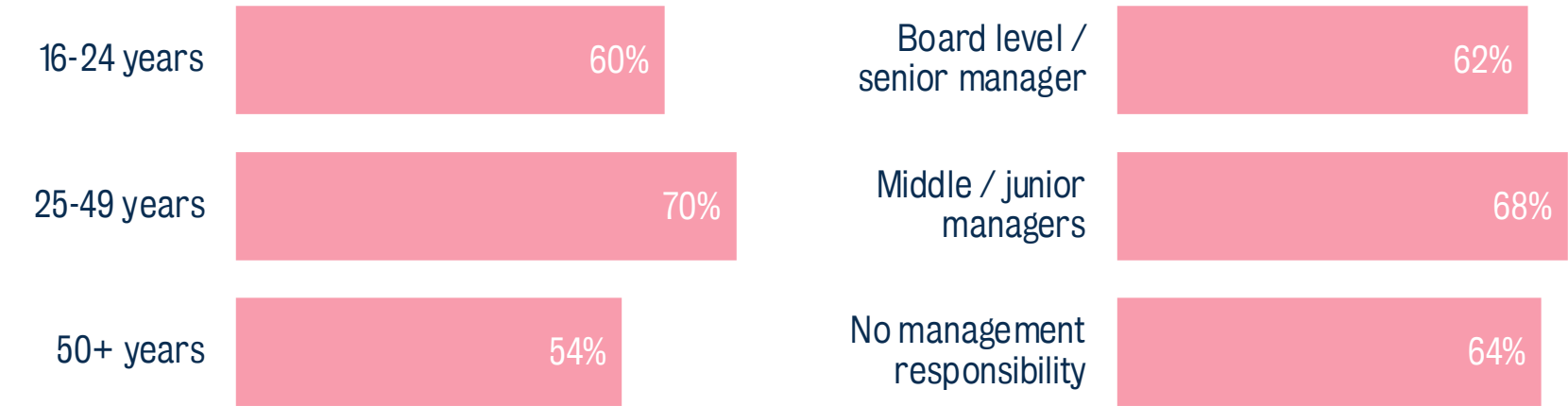
Across age groups, those aged 25 to 49 are most likely to say they'd quit in these circumstances (70%), though significant proportions of younger (60%) and older (54%) people take the same view.

And there is little difference in responses by job seniority, with senior mangers (62%) virtually just as likely as those with no management responsibility (64%) to say they'd look for a new job.

To what extent, if at all, do you agree or disagree with the following statements? **I would look for a new job if my employer made me follow a work pattern I did not like**



% who agree/strongly agree



Base: 1,840 London workers aged 16+ who work in organisations of two or more employees, surveyed online by YouGov, 23 Jun–12 Jul 2022 (16-24: 104; 25-49: 1,262; 50+: 474; board/senior: 414; middle/junior: 792; no management: 615)

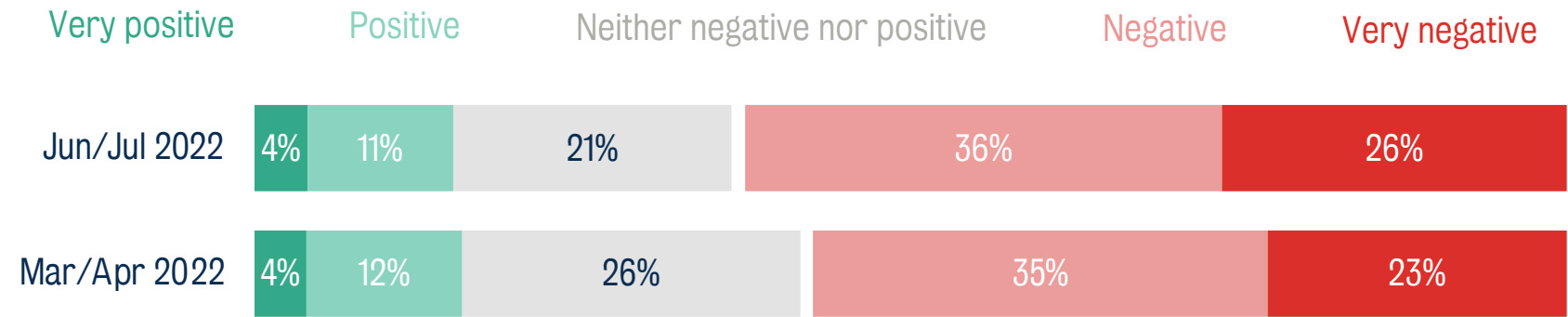


# And while people baulk at being required to increase their days spent in their organisation's workplace, they have little issue with going into work for specific tasks or events

Among London workers who work from home at least a day a week, six in 10 (62%) say they'd feel negative about being required to spend more time in their workplace each week – similar to the proportion who felt this way in March/April (58%). Only a small minority (15%) feel positive this prospect.

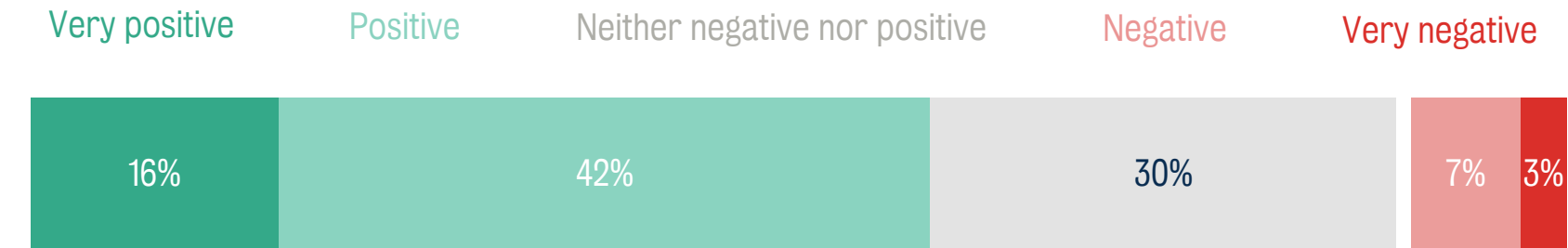
However, this group of London workers *are* generally willing to travel to their workplace for a specific task or event, such as a presentation or client meeting. Six in 10 (59%) say they'd feel positive about doing so, compared with around one in 10 (11%) who say they'd feel negative.

How would you feel about being required to work more days a week at your London-based place of work – for example, your company's office, retail or hospitality outlet or worksite?




Base: 1,567 London workers aged 16+ who work from home at least one day a week, surveyed online by YouGov, 23 Jun–12 Jul 2022, and 1,505 aged 16+ who work from home at least one day a week, surveyed 25 Mar–13 Apr 2022

How would you feel about being required to work in person specifically for essential events that must take place at your regular place of work (eg presentations, inductions, meeting clients, on-site commitments etc)?



Base: 1,567 London workers aged 16+ who work from home at least one day a week, surveyed online by YouGov, 23 Jun–12 Jul 2022



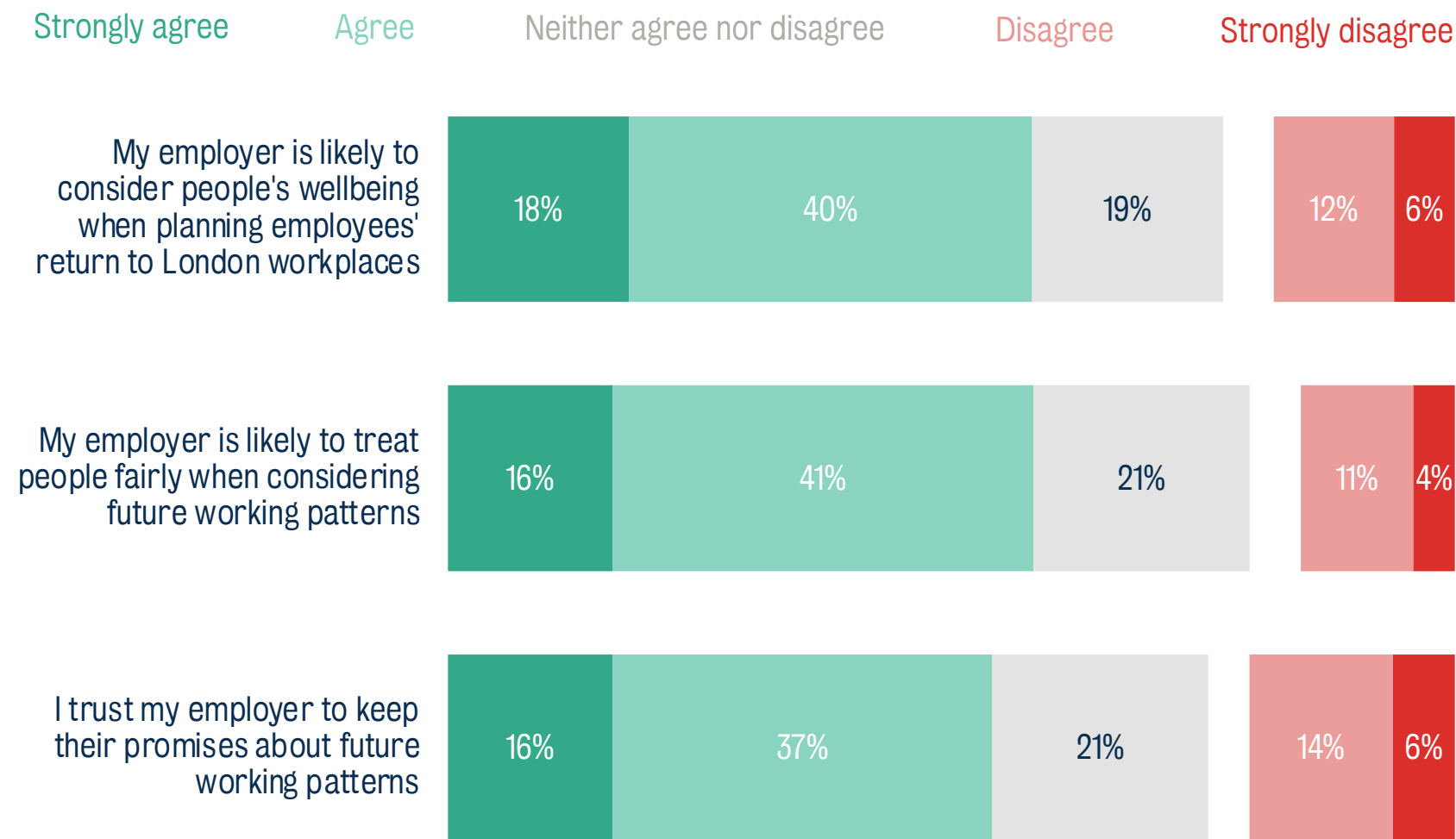
**Employers are generally trusted to be considerate and fair when future working patterns, while compromise between employer and employee preferences is ultimately seen as the most likely way forward long-term**



# People tend to think their employer will be considerate, fair and trustworthy when it comes to making decisions about people’s working patterns

Most London workers in organisations of two or more people trust their employers to keep their wellbeing in mind (58%), treat people fairly (57%) and keep their promises (53%) when planning employees’ return to their workplace or making decisions about future working patterns.

To what extent, if at all, do you agree or disagree with the following statements?



Base: 1,840 London workers aged 16+ who work in organisations of two or more employees, surveyed online by YouGov, 23 Jun–12 Jul 2022

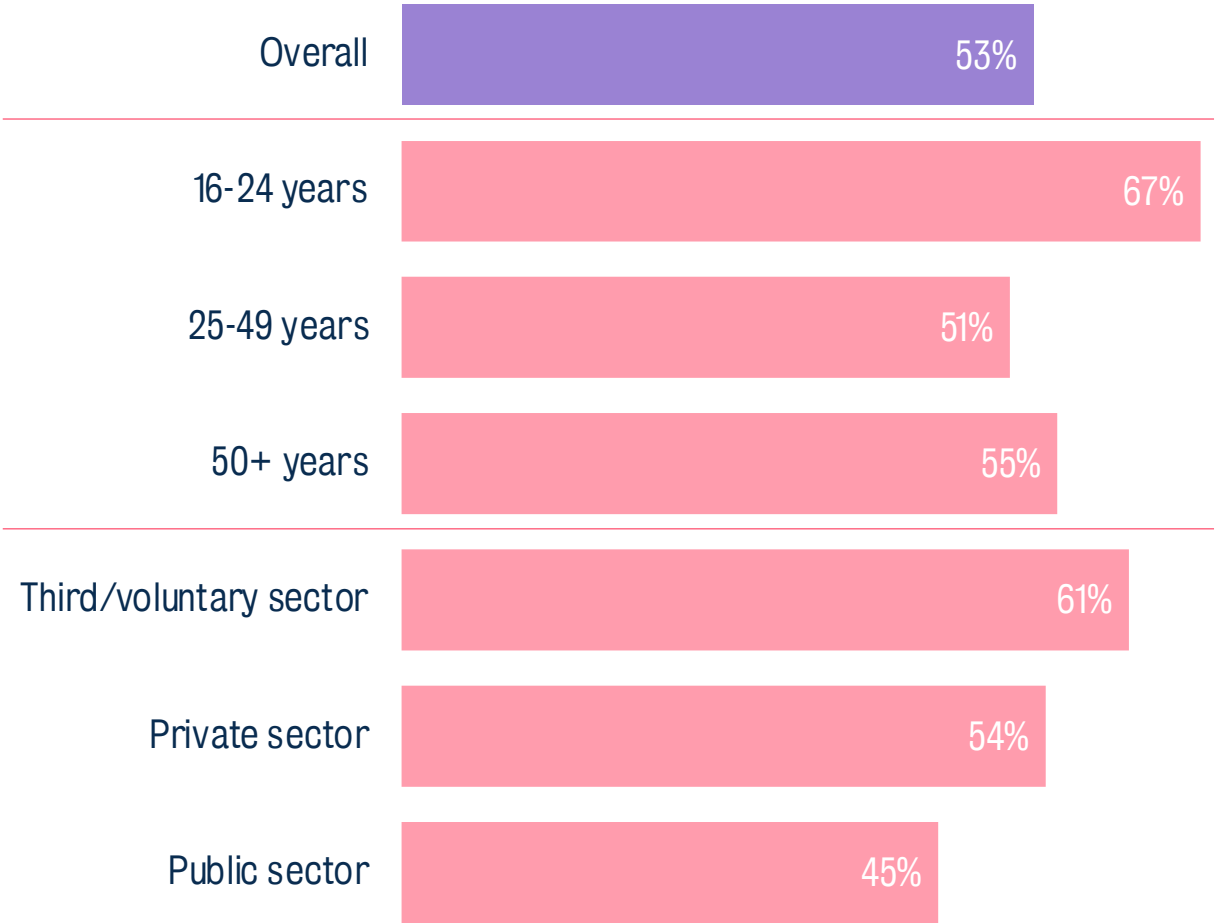


# Younger workers and those in the third or voluntary sector have most faith in their employer

Among London workers in organisations of two or more people, two-thirds (67%) of aged 16 to 24 say they trust their employer to keep their promises about future working patterns, compared with around half of older age groups who say the same.

There are also differences in views across sectors. 61% of this group who work in the third or voluntary sector trust their employer on this issue, compared with 54% of those in the private sector and 45% in the public sector.

To what extent, if at all, do you agree or disagree with the following statements? **I trust my employer to keep their promises about future working patterns** % who agree/strongly agree



Base: 1,840 London workers aged 16+ who work in organisations of two or more employees, surveyed online by YouGov, 23 Jun–12 Jul 2022 (16-24: 104; 25-49: 1,262; 50+: 474; private: 1,403; public: 270; third: 167)

## Some say their employer is encouraging people back to the workplace – but most say they are not

Among those working at an organisation with two or more employees, 28% say they're aware of their employer making changes to encourage people to work from their workplace more often. But far more – 61% – say they are not aware of any such efforts.

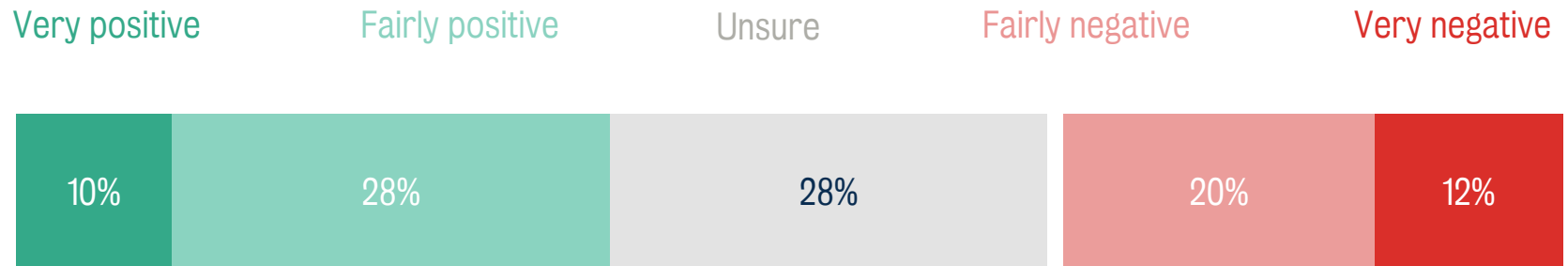
Those who are aware of their employer trying to encourage people back to the workplace more often are relatively divided on how they feel about this, with similar proportions feeling positive (39%) and negative (32%).

Are you aware of your employer making any changes to encourage people to work from your regular London-based workplace more often?



Base: 1,840 London workers aged 16+ who work in organisations of two or more employees, surveyed online by YouGov, 23 Jun–12 Jul 2022

How do you feel about these changes being implemented in your place of work?



Base: 516 London workers aged 16+ who are aware of employer changes, surveyed online by YouGov, 23 Jun–12 Jul 2022

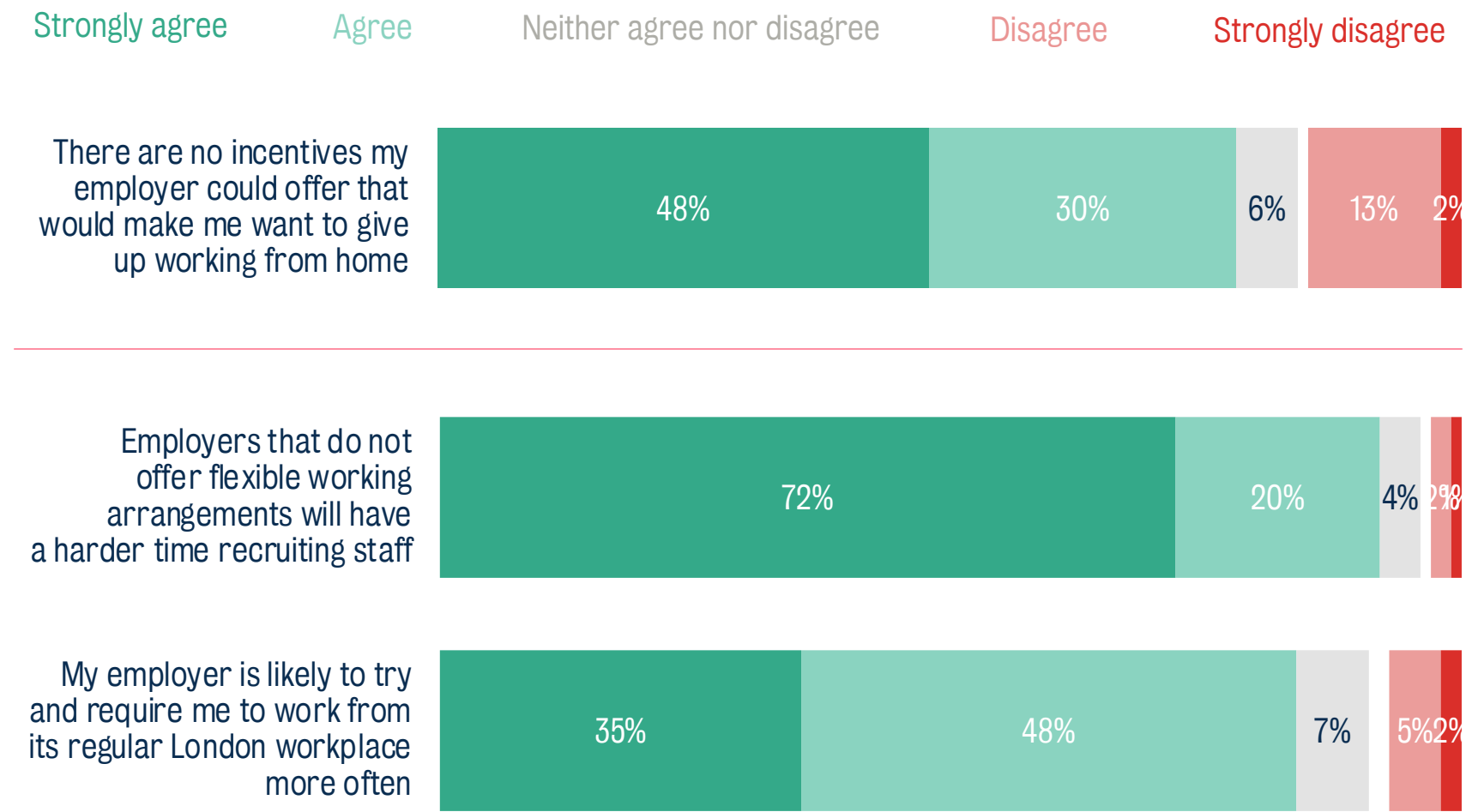


# Among those who feel negative about their employer encouraging people back, most say there are no incentives that would make them give up working from home

Eight in 10 (77%) of those who feel negative about their employer encouraging people back to the workplace say there are no possible incentives that would make them want to stop working from home, compared one in six (16%) who disagree.

A similar proportion (84%) of this group also express concern that they will be forced to go into the workplace more regularly, an even greater share (92%) feel employers that don't offer flexible working arrangements will have a harder time recruiting staff.

To what extent do you agree or disagree with the following...

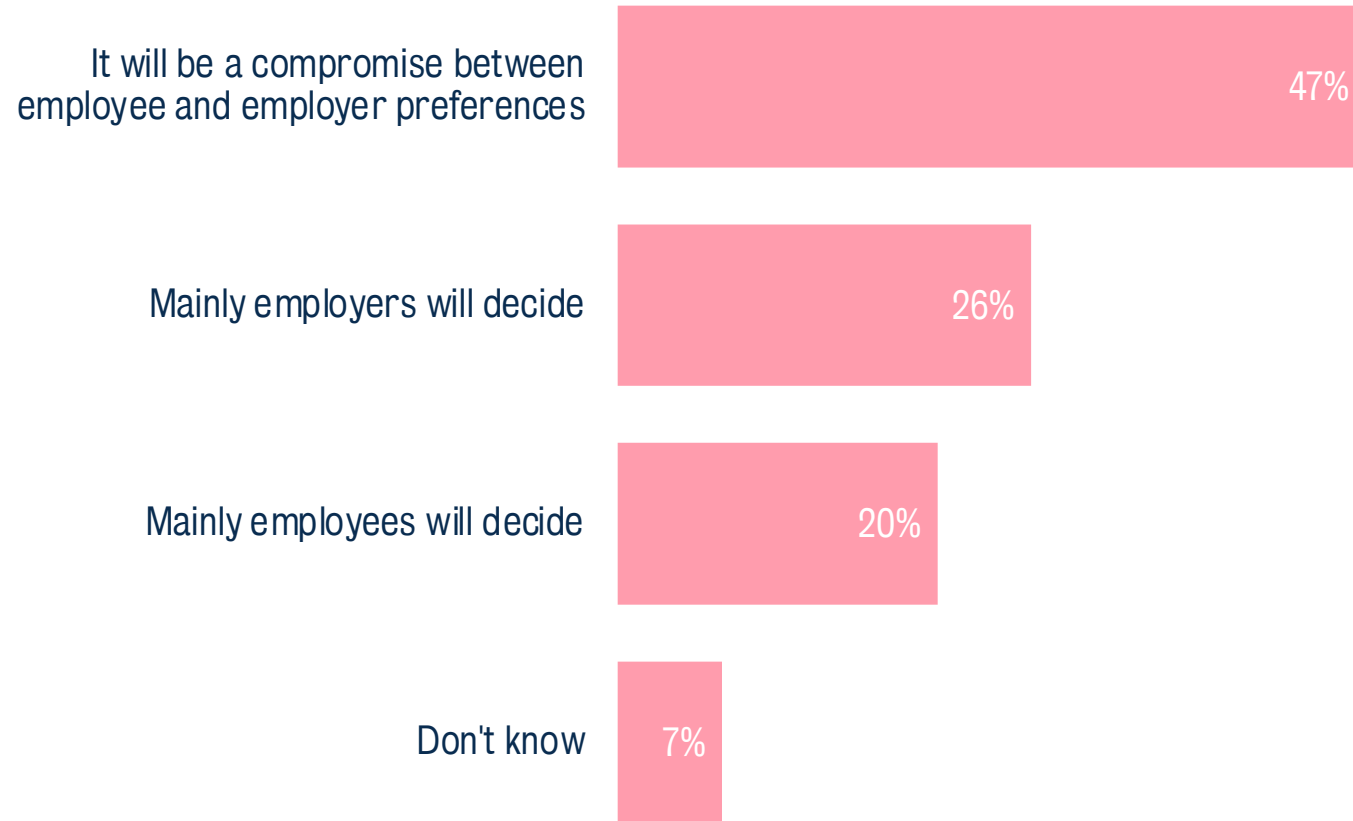


Base: 165 London workers aged 16+ who feel negative about employer changes, surveyed online by YouGov, 23 Jun–12 Jul 2022

## People see a compromise between employers and employees as the most likely way working patterns will be decided in the next few years

Around half (47%) of London workers feel future working patterns in the capital will be decided through a compromise between employee and employer preferences. This compares with a quarter (26%) who think it will mainly be employers that decide, and a fifth (20%) who say employees will have most responsibility for such decisions.

Who do you think will decide the future working patterns of London workers in the next few years?





# Survey details

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2,030 adults. Fieldwork was undertaken between 23 June and 12 July 2022. The survey was carried out online. The figures have been weighted and are representative of London workers, defined as those who have a regular workplace in the capital.

# Subgroups

Variable	Base	Variable	Base
<b>Gender</b>		<b>Sector</b>	
Male	1,046	Private sector	1,508
Female	984	Public sector	346
<b>Age</b>		Third/voluntary sector	176
16-24	128	<b>Job seniority</b>	
25-49	1,373	Board level/senior manager	516
50+	529	Middle/junior managers	825
<b>2019 general election vote</b>		No management responsibility/other	666
Conservative	493	<b>Income level</b>	
Labour	717	Under £30,000	201
<b>Work pattern/location</b>		£30,000 to £49,999	310
London-based place of work for all/ 5+ work days	389	£50,000 to £99,999	711
Hybrid (at least 1 day WFH and <5 days in London-based place of work)	1,333	£100,000+	503
Home-only (All WFH)	176		

# Work/Place

**KING'S  
BUSINESS  
SCHOOL**

**THE  
POLICY  
INSTITUTE**

**KING'S**  
*College*  
**LONDON**

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