

Findings from Hybrid Working Survey CELC June 2023

18 of 32 London Councils responded to the Hybrid Working Survey, sent by London Councils in June 2023. The specific Councils that responded are as follows:

- Barnet
- Croydon
- Ealing
- Enfield
- Haringey
- Havering
- Hillingdon
- Hounslow
- Islington
- Lewisham
- Merton
- Newham
- Redbridge/Wandsworth
- Sutton
- Waltham Forest
- Westminster
- City of London

The largest percentage of those Councils who have responded, say that the average time their employees spend out of the office/or flexibly working is 60-80%, but this tends to vary between frontline workers and back office and also due to role type.

A small percentage of Councils (2) say that there is an 80>20% split between home and work.

Most Councils that have responded, advise that the working arrangements vary depending on the role and that they are actively seeking to be more flexible with their employees and working arrangements.

Merton Council – Implementation/impact of a three-day working week in 2023 - Contact: Liz Hammond – Interim Head of HR & OD, Merton Council

Merton Council implemented a change to Workplace Attendance in 2022 (moving from a requirement for 2 days in office to 3 days) and was contacted to find out how this change has impacted the Council and their employees.

Since implementation at Merton Council, there has been a lot of local interpretation, and this differs between service areas and their needs.

This has additionally been affected by the following:

- Type of role (Front line or Back-office worker)
- Role specialism, and whether statutory requirements determine attendance at particular locations.
- Management – either pushing for less office attendance (as not fully necessary), or a requirement for more than 3 days to be in the office (due to role type)

Trade Unions feedback

Initially did not receive the new changes favourably, as cited that they had concerns about the speed of implementation, consistency of this approach throughout the Council as it appeared to differ, dependant on role and service need. However, the TU regional offices gave a mandate for their TU convenors to ensure that they did attend the office 3 days a week, to encourage Trade Union membership and to ensure that they were available for their members.

Senior Management feedback

I enquired as to whether the Senior Management had been promoting the new working arrangements and whether there had been any issues or pushback.

Four new Directors (out of 6) had been newly appointed at the time of this new implementation of three days a week in the office, and therefore this requirement had been built into the new contracts, and so this had ensured that the strategy had been successfully cascaded throughout the workforce and this has had a positive effect.

Employee feedback

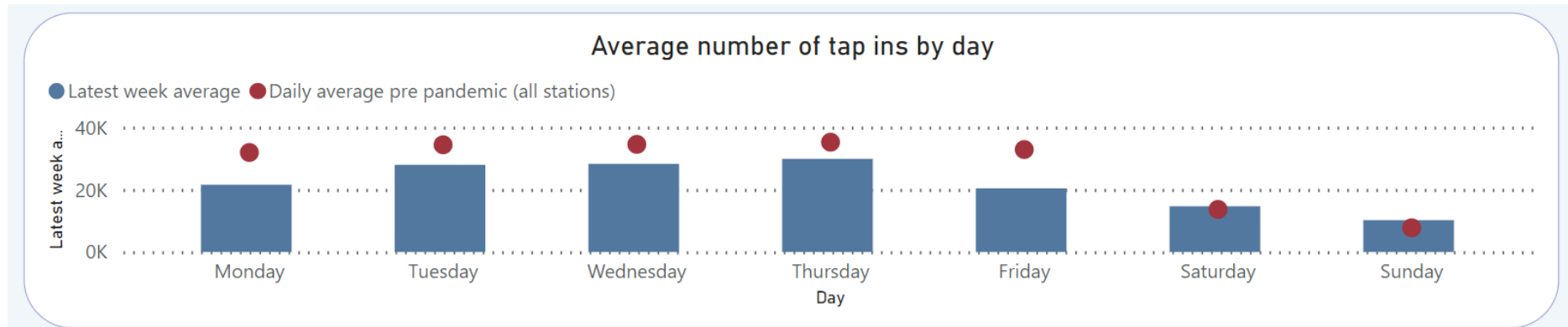
Difficult to monitor, as it seems that due to local application, the experience of employees with this new approach will entirely depend on the type of role and where this is sat in the business, along with specific flexibility around requests to work under specific agreements such as Statutory Flexible Working requests.

Key lessons learnt via this implementation.

- Ensure clear, concise, structured and engaging communications are sent to employees, in phases prior to the implementation taking place – this ensures that the message stays clear (helps with engagement), is taken forward as a strategy/business driver and allows employees to make different arrangements externally in advance of changes taking place to working arrangements. E.g. childcare, carer responsibilities.
- Remember – not 1 size or approach will fit all employees or individual service needs

City of London – Return to office- figures and trends

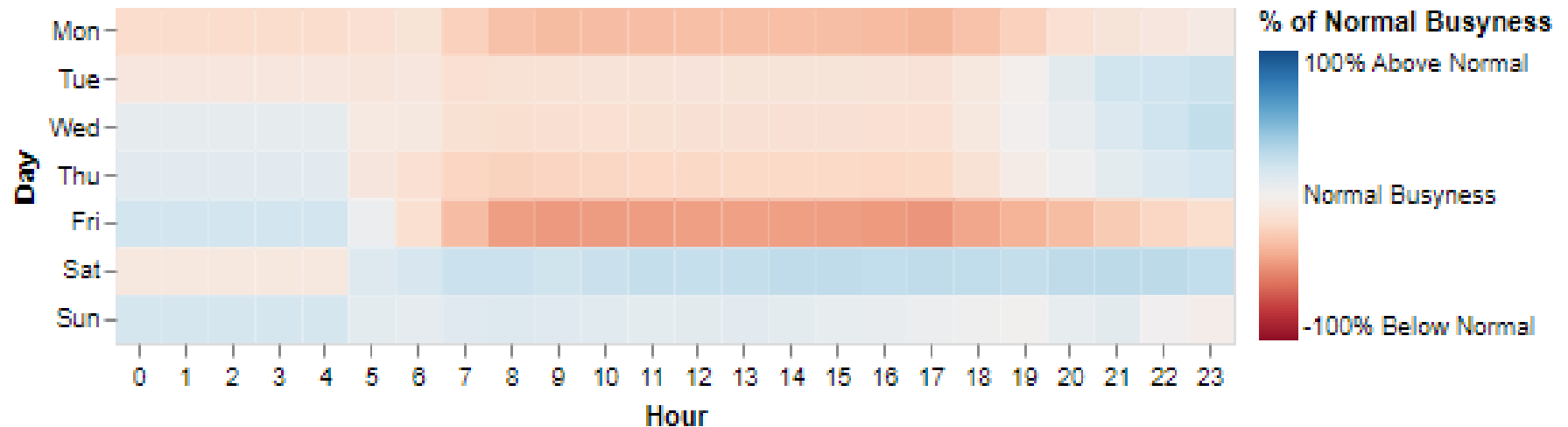
1. **Footfall according to TfL data** in the City dropped dramatically during lockdown, but has recovered strongly with flexible working patterns now embedded. Tube journeys in the City have now stabilised at around 80% of normal / pre-pandemic levels across the whole week, for all journeys. With some distinct daily differences:
 - The **working week** being around **two-thirds of normal** activity.
 - **Mondays and Fridays** have stabilised slightly **above half** of normal activity.
 - **Weekends** have seen footfall activity **rise above** pre-pandemic levels.



2. **The O2 data** is best placed to display the consistent midweek peak during the working week by hours of the day.
 - The chart below shows that busyness in the City is above normal particularly in the **evenings of the working week** compared to pre-pandemic busyness. Alongside the City being busier at the weekends. We have also seen this reflected in spend patterns, which have now returned to normal, despite lower footfall. As workers stay longer in the City and spend more while here as below.

City of London - Latest '% of Normal' Busyness

Daily / Hourly % of Normal Busyness for Workers in selected MSOA (E02000001)



Source: Anonymised and aggregated data by O2 Motion

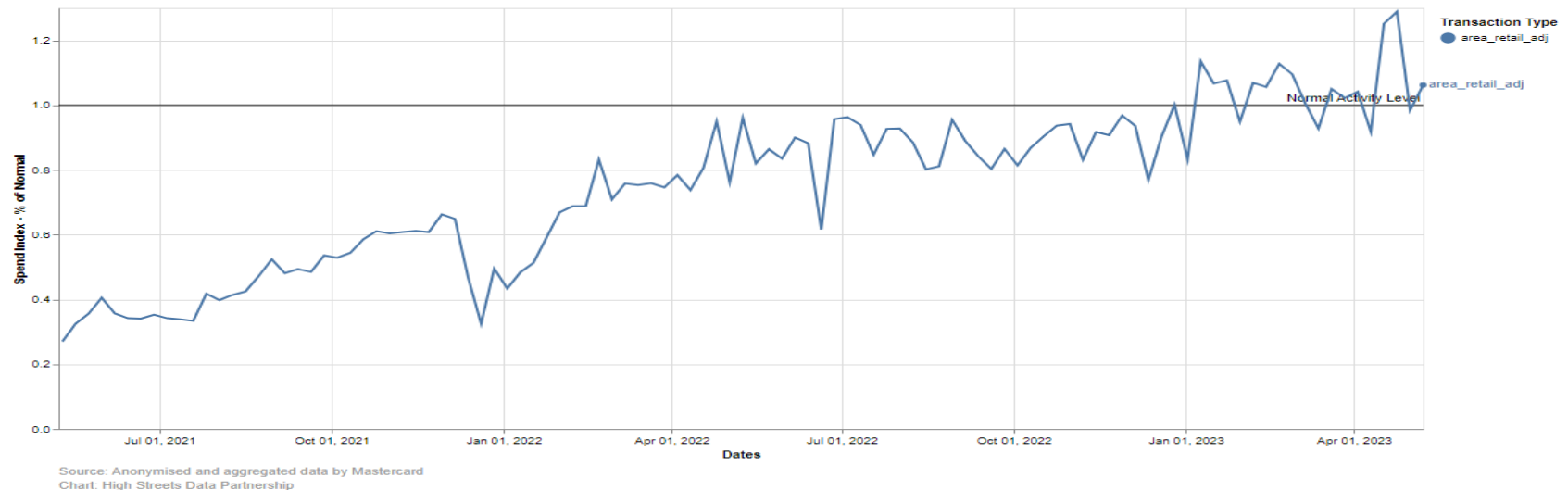
Chart: High Streets Data Partnership

3. **Spend in the City** has returned to pre-pandemic levels, ahead of footfall.

- ⊖ According to Mastercard data, spend has recovered to pre-pandemic levels at the start of this year. (This has taken account of inflation and the switch from cash to card that initially occurred at the start of the pandemic). We have likely seen a **behavioural shift** in spending

patterns in the City, with commuters coming in slightly less e.g. 2-3 days a week, but on the days they are coming into the office – being more willing to spend when they are in the office than at home.

City of London - Compare Mastercard Transaction Types: Retail (GLA Adjusted)
08/05/2021 to 08/05/2023, Weekdays (Mon-Fri), Spend Index (% of Normal)



4. We haven't systematically surveyed firms since patterns have stabilised. But narratively, from **engagement with businesses in the City** in the latest quarter:
- Firms have generally, particularly in sectors such as tech, seen **more flexibility introduced** around their mandated policies on working in the office in order to remain competitive in attracting talent.
 - The policies around working from home in the City remain highly **influenced by the companies sector and function of the roles**.
 - Anecdotally, with some tech firms getting even more flexible. But some roles in banks required to return 5 days a week to more easily comply with regulations.

