

Eupnea Survey for UK Employees, December 2022

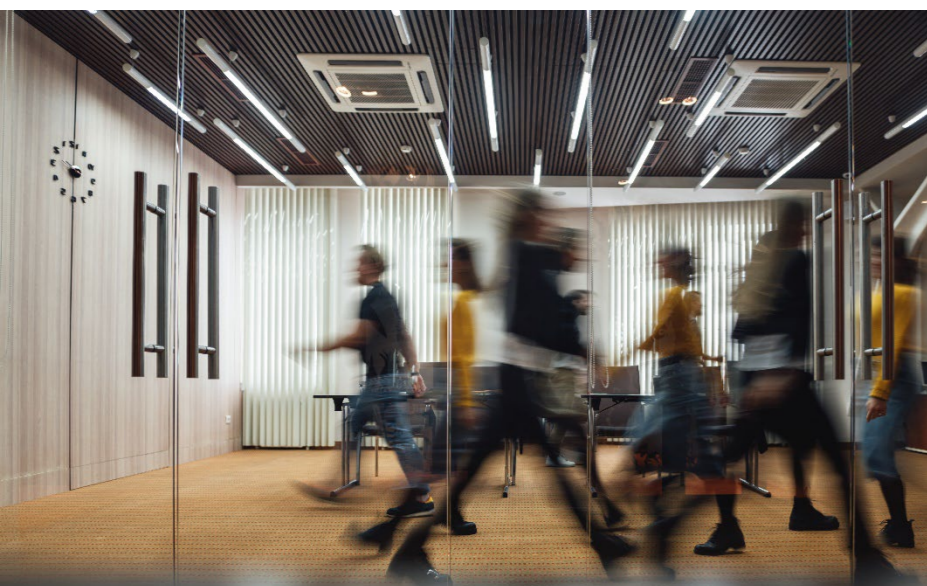


A year of decisioning
and transitioning
in where we work.
Change happened,
not everywhere.



While the Covid-19 pandemic in December last year was nearing its end in the UK, we conducted a survey research on UK workers for the first time with aim to reveal the latest widespread changes that had occurred in the workplaces of UK organisations by that time and what was the preference amongst UK workers for these changes being transitory or having a permanent effect.

The work environment in most UK businesses had significantly changed by the end of last year, as our research showed. Working remotely was used extensively, working in physical workplaces was noticeably below pre-pandemic levels and a hybrid workplace setting had been recently introduced by many businesses either as the only viable solution under the then circumstances or as a result of strong preference amongst their workers while the health risks due to the pandemic were still high.



Today, a year later and almost a year since restrictions in the UK due to the pandemic completely ended, the results of our research for a second year are very revealing for the lasting effects that the pandemic has had in the workplaces of many UK businesses. Our ongoing research study presents further evidence about how the preference of many UK workers for where they want to work has recognisably changed from the pre-pandemic era, however not much further since last year. At the same time, the results also confirm how many organisations have already reimagined their work environments and, hence, some of the effects of the pandemic being even more likely to prove to be permanent by choice of everyone involved.

Key Findings

1. Home-based work & consistent remote working are set firmly above pre-pandemic levels

1 in 4 UK workers worked from home always or almost always in 2022, twice as many the pre-pandemic levels. In addition, only 29% of UK workers never worked from home during 2022, compared to 56% prior to the pandemic.

Increased job movements and other dynamics of the UK labor market, as well as, impact of cost of living crisis added to a significant number of workers totally switching their work pattern from only remote working to office working and vice versa.

2. SME businesses tend to a two-choice decision about remote and office working while large organisations consider more options

36% of SME workers never work from home and 31% work at least 4 days a week or their work is home-based, compared to 29% and 20% of workers of big organisations respectively.

However, 17% of workers of big organisations compared to only 4% of workers of SME businesses say that they frequently work remotely from home for at least 3 days a week and their work is normally remote from home.

3. The pandemic had permanent impact in how we continue to work today with 4 in 10 workers saying they had no change in their workplace in 2022

For SME businesses, almost half of workers say that their work environment has not changed compared to 1 in 3 amongst workers of large organisations (49% vs. 33%).

4. A year transitioning into hybrid, for large organisations mostly

A hybrid workplace was adopted significantly more by large organisations than SME businesses (45% vs 20%). In 2022, the percentage of workers of big organisations that worked in a hybrid workplace increased by about 20%, from 25% to 45%. This increase mostly happened from transitioning from remote working which decreased by 23% to only 7% amongst workers of large organisations between 2021 and 2022.



5. Continued flexibility and support from employers and effective employee communications in post-pandemic era

Significantly more UK workers were very satisfied in 2022 with the flexibility of their employer and support that they were provided for changes in their workplace (37% in 2022 vs. 28% in 2021).

6. For many businesses a hybrid workplace is final and return-to-office not a decision on

For large organisations, 7.4x more workers would prefer a hybrid environment with more remote working than less. This is considerably less than for SME businesses where 3x more workers would prefer more remote working in a hybrid environment and reflects on the fact that many large organisations transitioned their workforces from remote working into hybrid roles during 2022.

7. Cost of living crisis weighs on remote working preference

Amongst UK workers preferring to work remotely from home, time and stress from commuting to the office is the most important reason. Saving money from not commuting to work and spending on other work-related expenses is the second most important reason registering the highest increase amongst every other reason moving up from third place in 2021, mainly as a result of the current cost of living crisis with increased costs of traveling and an evident squeeze of the finances of UK households. Balancing work-life better features in third place again.

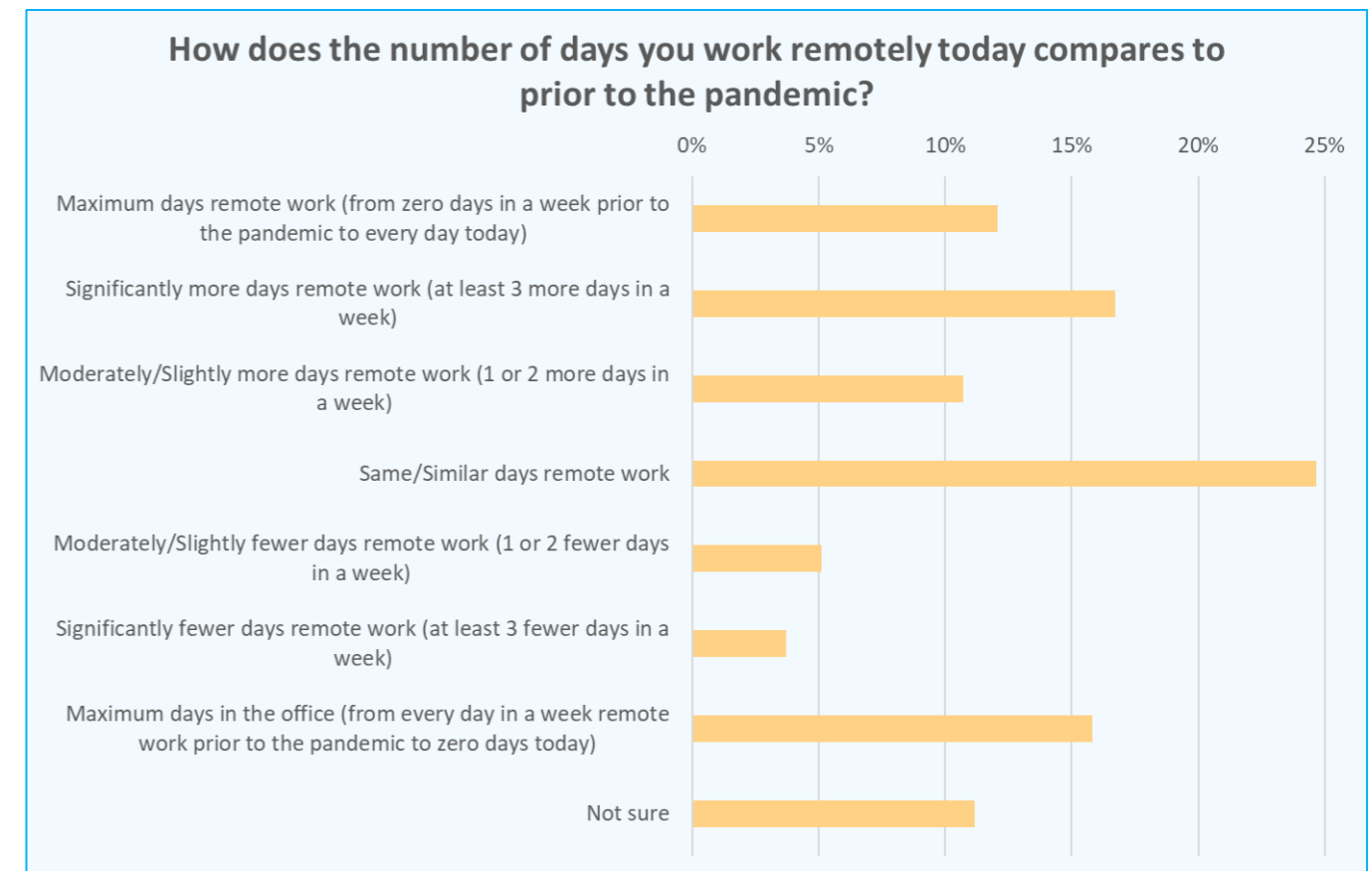
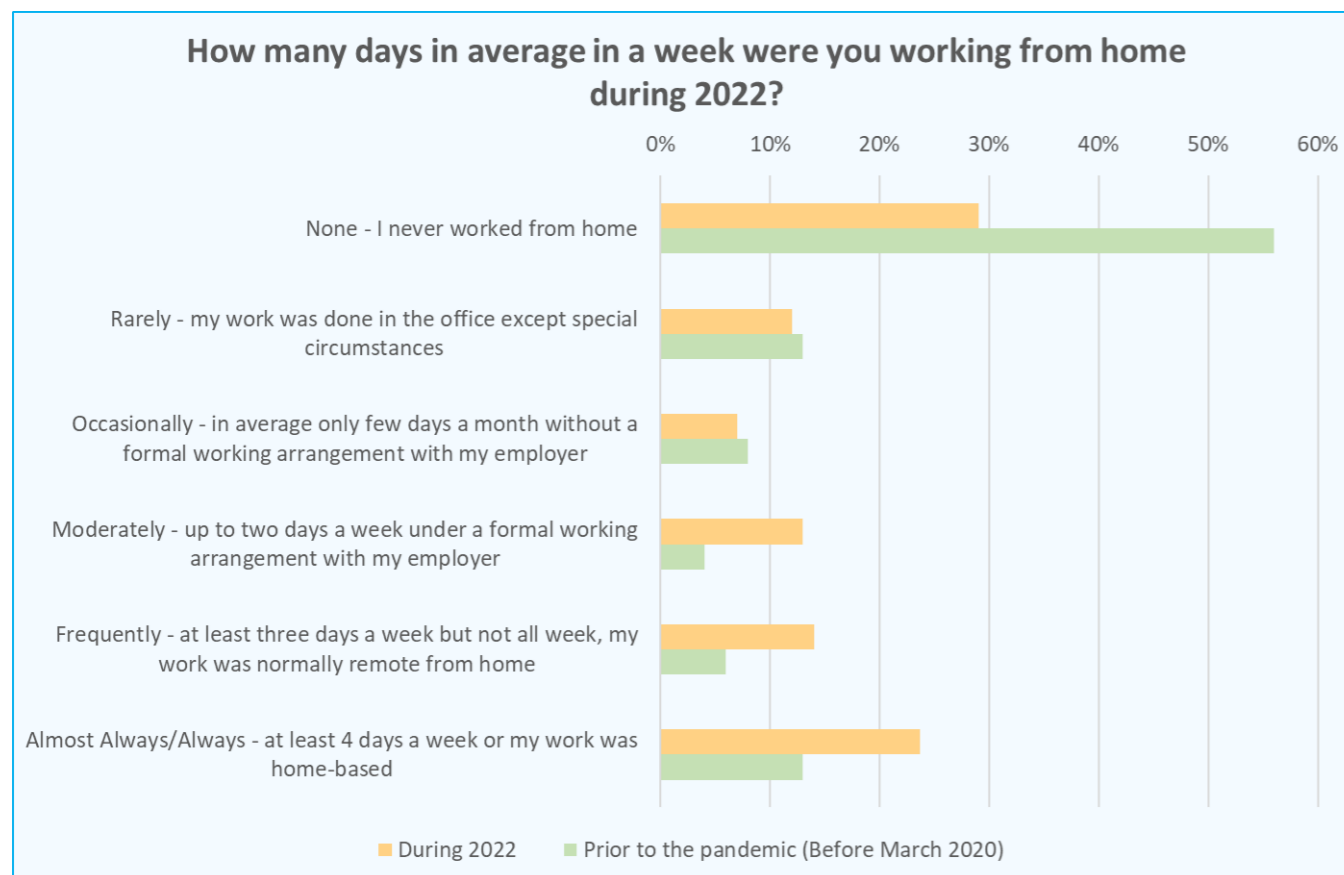
Connecting with colleagues and building relationships is again the most important and dominant reason this year amongst workers that prefer to work in the office.



The pandemic had forced many UK workers in most organisations to work remotely from home for avoiding close interaction with their colleagues at work and other people while commuting to the locations of their physical workplaces. However, today remote working for a significant segment of the workforces of UK businesses continues to be the normal way to work and standard work arrangement in place, considerably above the levels observed prior to the pandemic.

- 29% of UK workers never worked from home during 2022, compared to 56% prior to the pandemic
- Almost 1 in 4 (24%) of UK workers worked from home at least 4 days a week or their work was home-based during 2022, almost twice as much (13%) the pre-pandemic levels
- Consistent remote working for a number of days a week under a formal arrangement with the employer was considerably higher in 2022 than prior to the pandemic
- Only 1 in 4 (25%) of UK workers say that the number of days they work remotely today is the same or similar to how many days they worked remotely prior to the pandemic. However, there is a significant number of workers that have experienced maximum switching from only office working to only remote working (12%) and vice versa (16%), indicating job movements and corroborating for the dynamics of the UK labor market we have observed since the end of the pandemic

Home-based work & consistent remote working are set firmly above pre-pandemic levels.





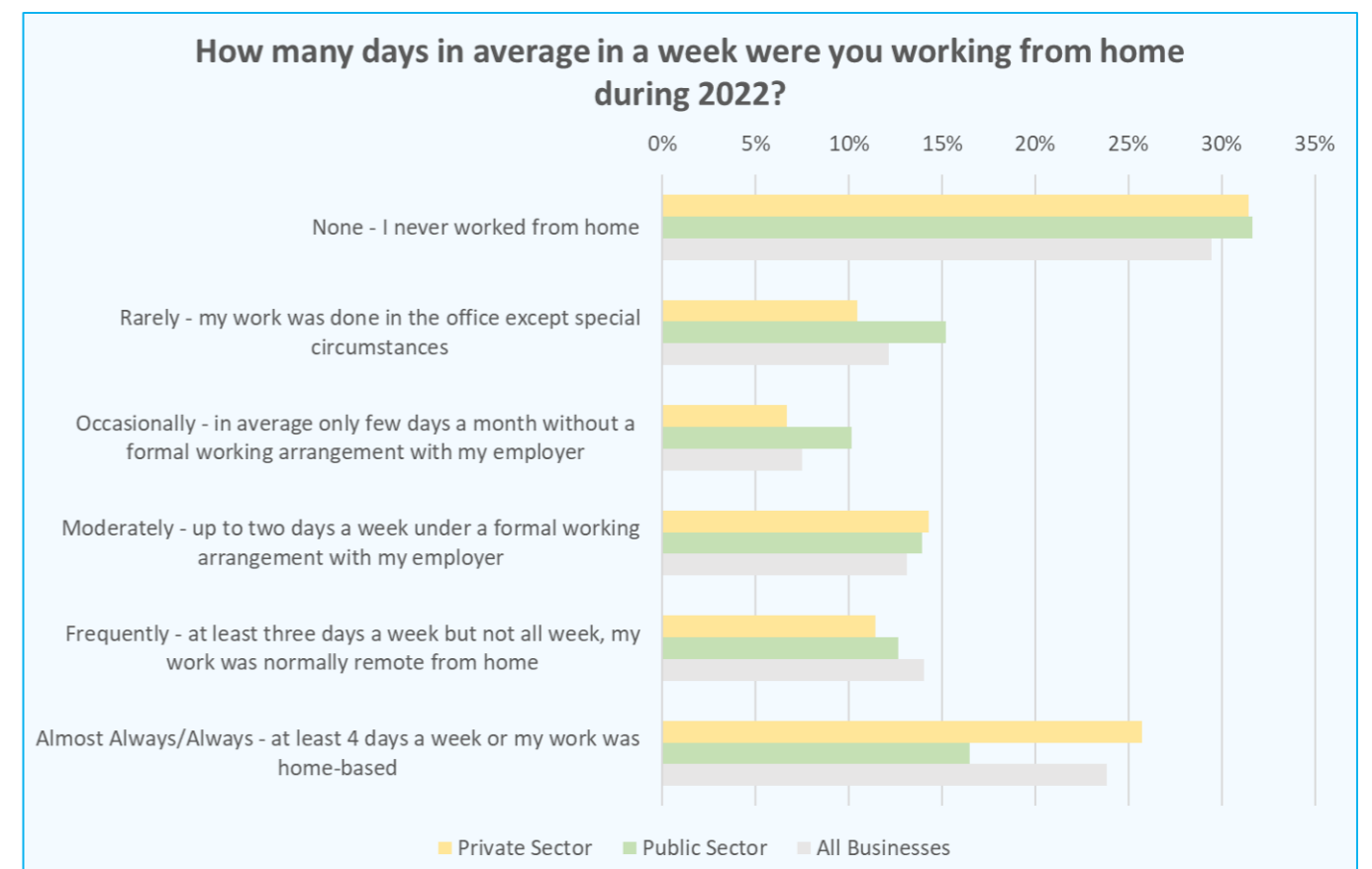
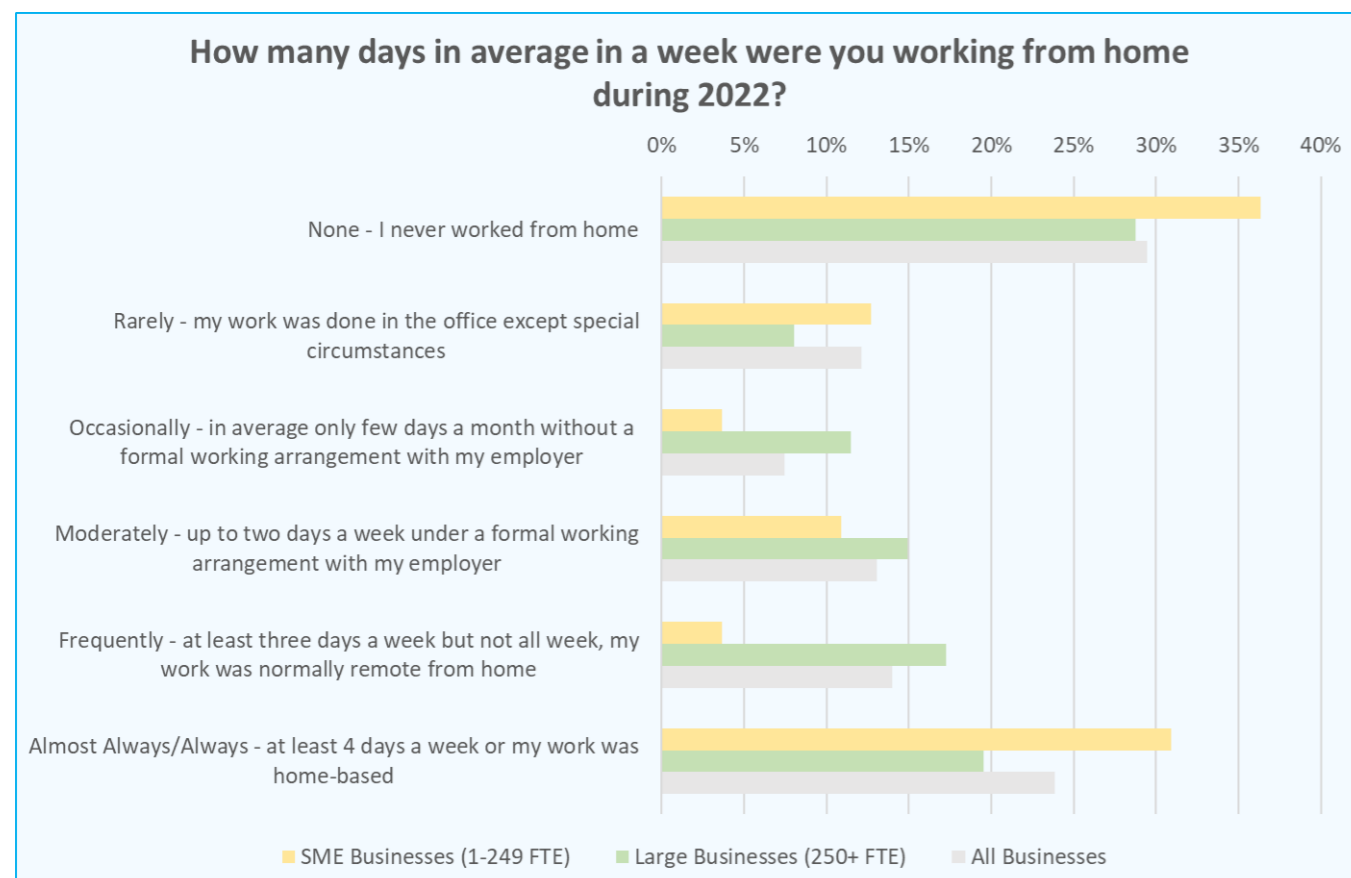
SME businesses tend to a two-choice decision about remote and office working while large organisations consider more options.

Amongst workers of UK SME businesses, the two prevailing work arrangements are to either never work from home or work almost always or always remotely from home, while within the workforces of big organisations a relatively higher number of workers also work many days in a week from home but not always or almost always.

- 36% of SME workers never work from home and 31% work at least 4 days a week or their work is home-based, compared to 29% and 20% of workers of big organisations respectively
- However, 17% of workers of big organisations compared to only 4% of workers of SME businesses say that they frequently work remotely from home for at least 3 days a week and their work is normally remote from home

Working remotely always or almost always is more applied in the private sector than public sector today.

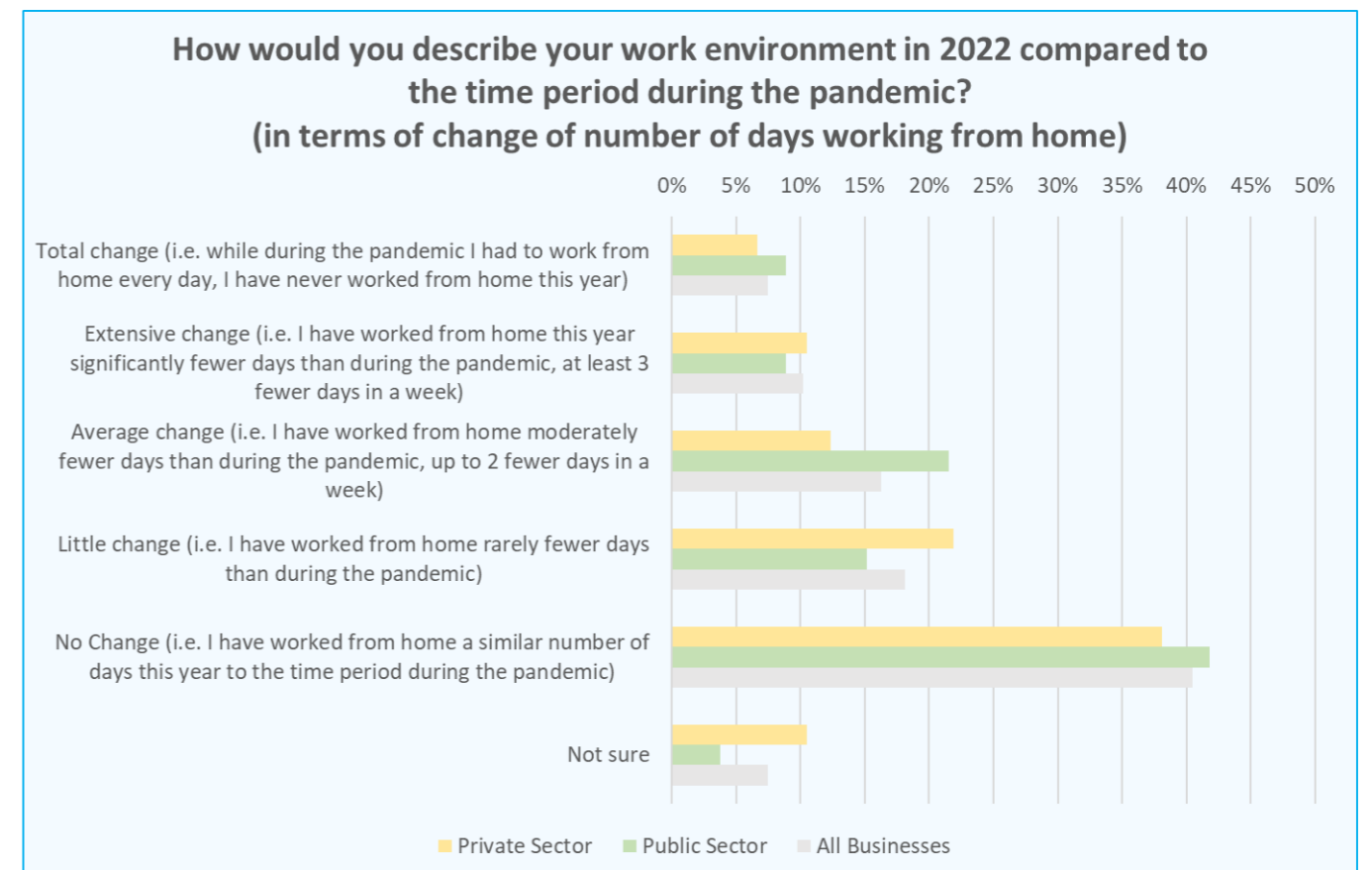
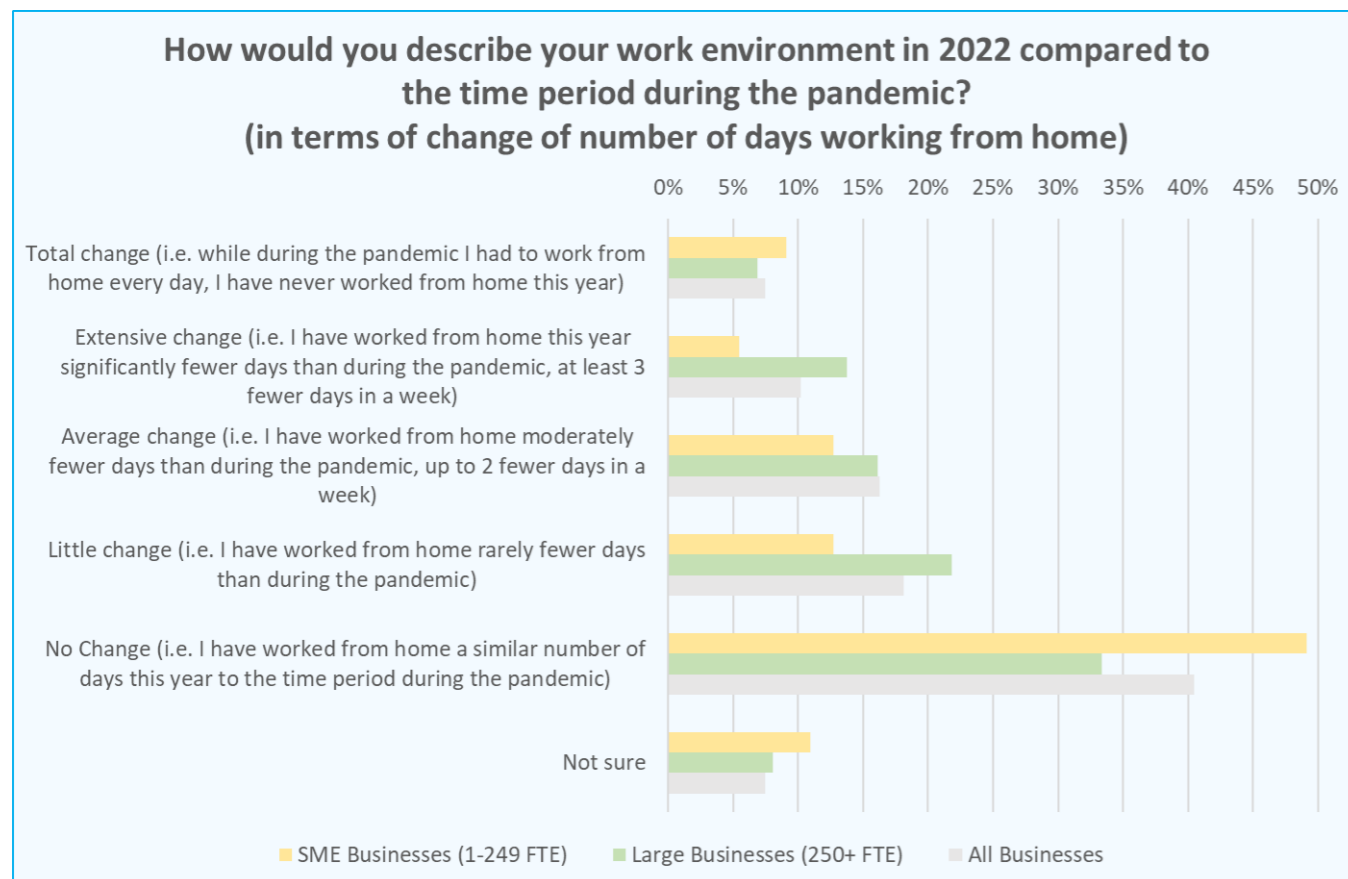
- 26% of workers in the private sectors say they work remotely at least 4 days a week or their work is home-based compared to 16% in the public sector



The pandemic had permanent impact in how we continue to work today with 4 in 10 workers saying they had no change in their workplace in 2022.

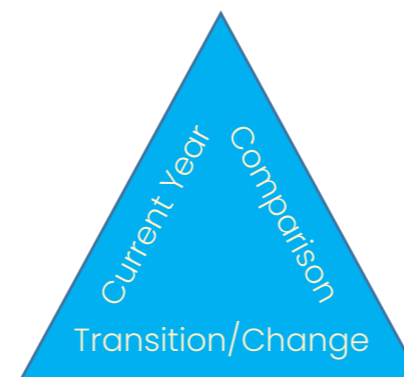
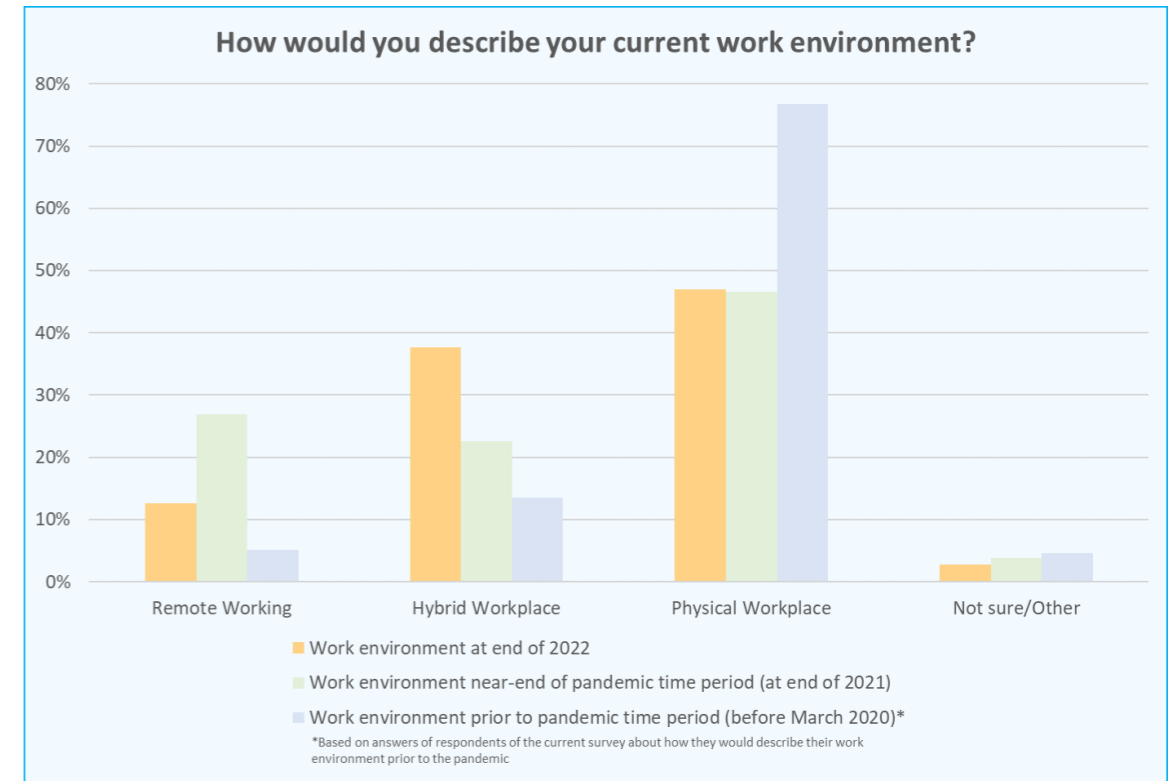
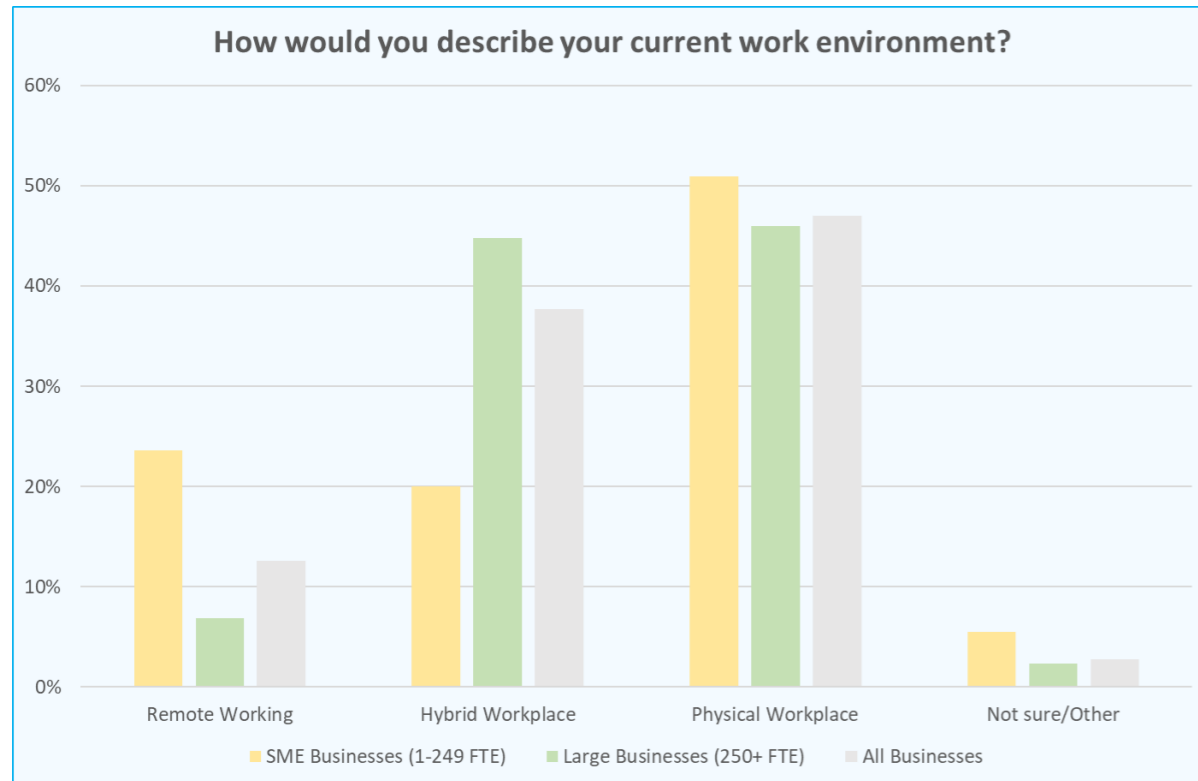
The new information from our ongoing research study for another year shows more evidently that the multiple ways that UK organisations had chosen during the pandemic to change their physical workplaces and include remote working are still in place today. Many UK organisations continue to have the same working arrangements with their employees and provide the same work environment. While in the onset of the pandemic we saw a need for drastic action from almost every business in the UK to adapt to the new reality, today the decisions made then have not been reversed and a return to a work environment as they knew it prior to the pandemic does not appear to be likely for many organisations.

- 4 in 10 workers of UK organisations say that they work from home a similar number of days in 2022 to the time period during the pandemic and their work environment has not changed
- For SME businesses, almost half of workers say that their work environment has not changed compared to 1 in 3 amongst workers of large organisations (49% vs. 33%)
- No change in the work environment of workers has happened during 2022 for relatively the same percentage of businesses within the private and public sectors (38% vs. 42%)

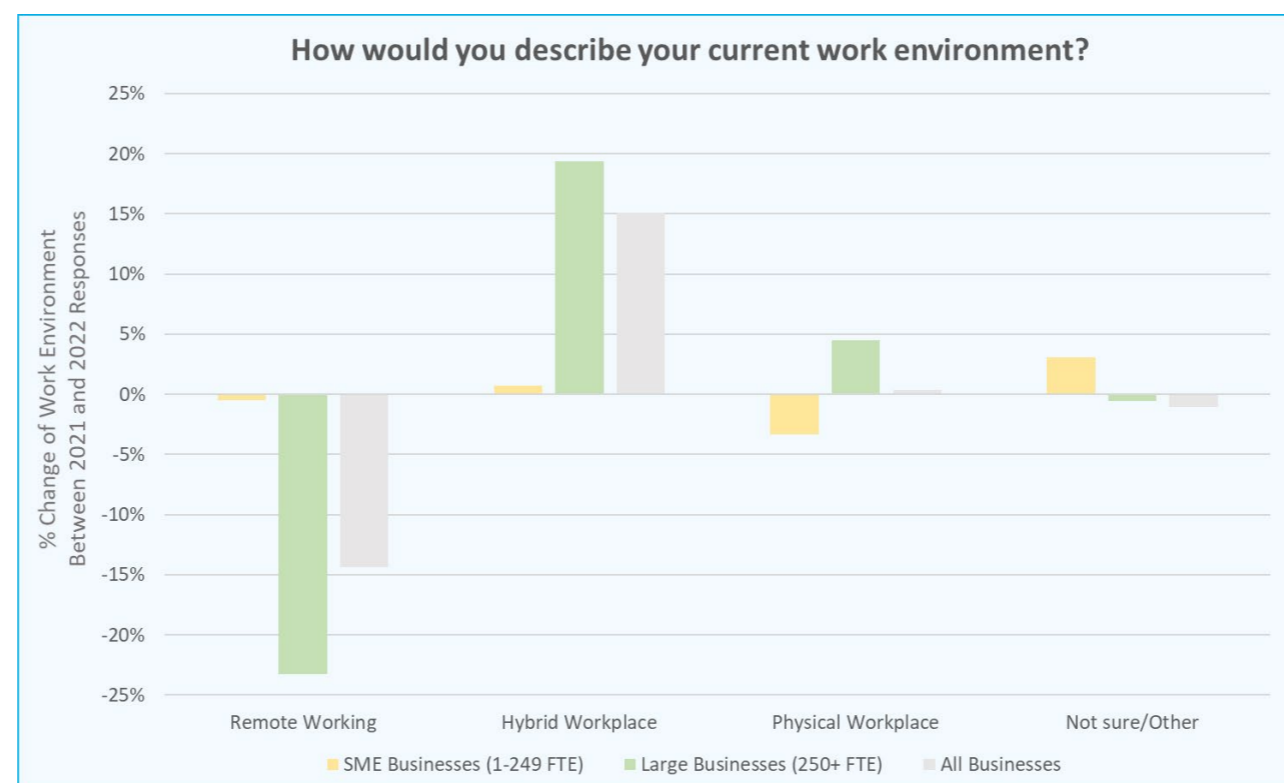


A year transitioning into hybrid, for large organisations mostly.

Following the introduction of the hybrid workplace by most UK organisations in the final months of the pandemic through the second half of 2021, in 2022 we observed unequivocally how the hybrid workplace was established to be a strong alternative to the physical workplace and considered by various businesses as more practical and preferred. Many businesses have continued to transition their workforces back to the office, however this year we have seen a strong rise of the hybrid workplace as a final reimagined workplace setting for various UK organisations.



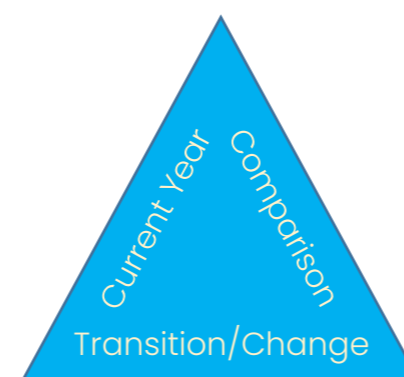
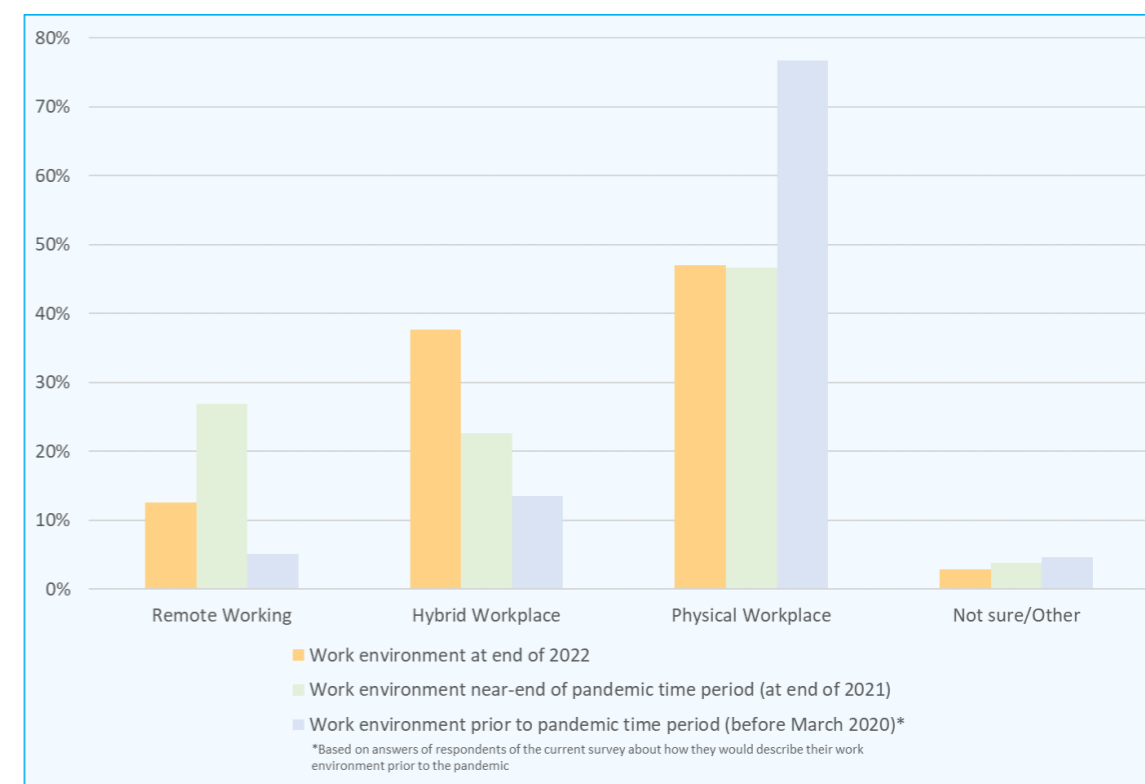
- The vast majority of workers of SME businesses continued in 2022 to work in the same work environment they worked in 2021
- Significantly more workers of SME businesses work remotely than workers of large organisations (24% vs 7%)
- Based on the workers surveyed, a hybrid workplace was adopted significantly more by large organisations than SME businesses (45% vs 20%). In 2022, the percentage of workers of big organisations that worked in a hybrid workplace increased by about 20%, from 25% to 45%. This increase mostly happened from transitioning from remote working which decreased by 23% amongst workers of large organisations between 2021 and 2022



- The same percentage of UK workers as in 2021, just under half (47%) of them, say they work in a physical workplace today, compared to 77% of them who were working in a physical workplace prior to the pandemic
- 38% of UK workers say that they work in a hybrid workplace, significantly more than 23% in 2021
- Less than half of UK workers in 2022 than in 2021 say that they only work remotely from home (13% vs. 27%)
- About 1 in 3 (35%) of UK workers that were working in a physical workplace prior to the pandemic work in a hybrid workplace today. However, only 6% who worked in a physical workplace prior to the pandemic have today only remote work (chart not displayed here)

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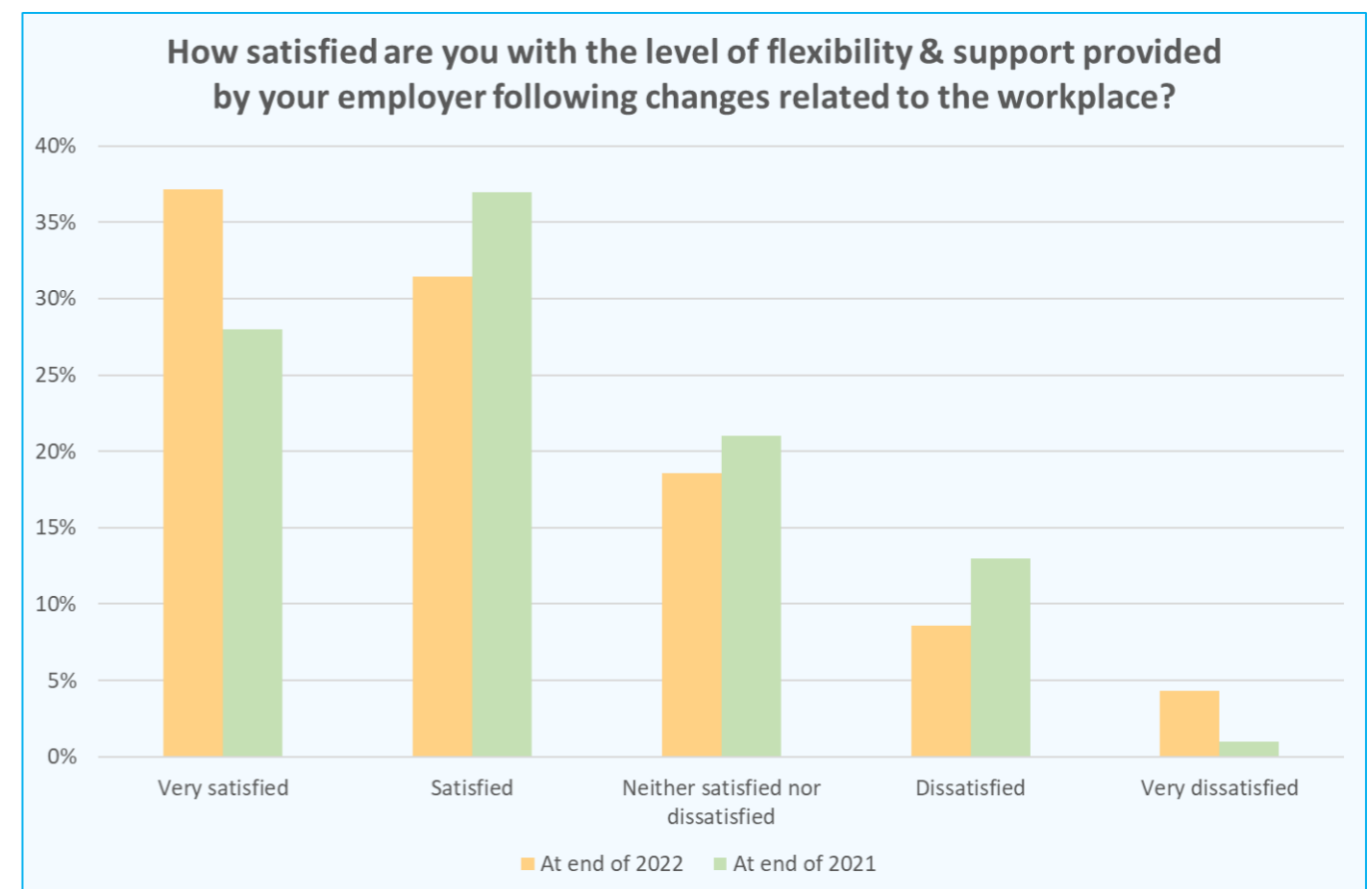
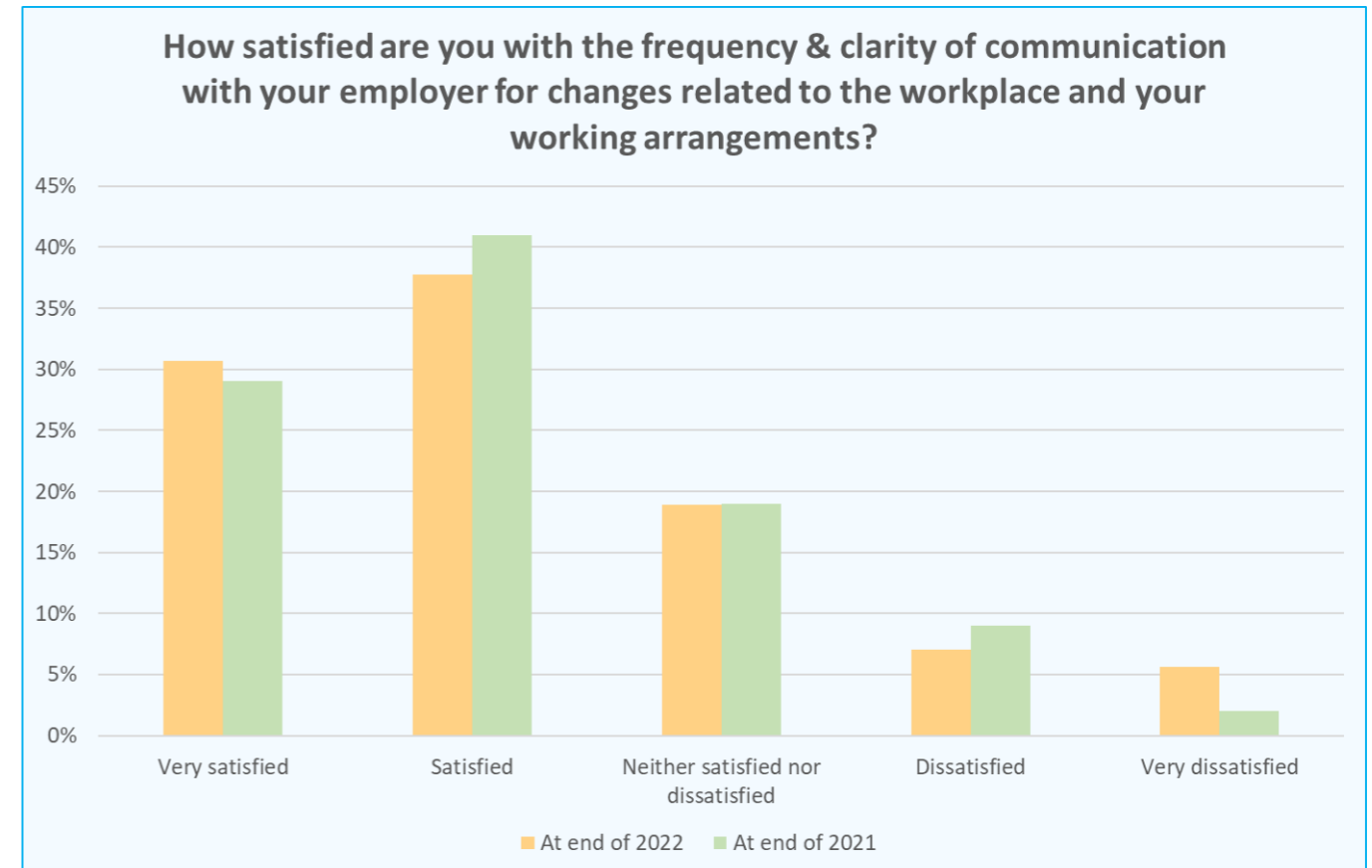


Continued flexibility and support from employers and effective employee communications in post-pandemic era.

For most workers and employers this year was considered a period of transition. While restoring mobility in the post pandemic era has been welcomed in employee communications, some of the new ways of working that were introduced during the pandemic are kept today and they are now part of the arsenal of methods many workers use in how they work.

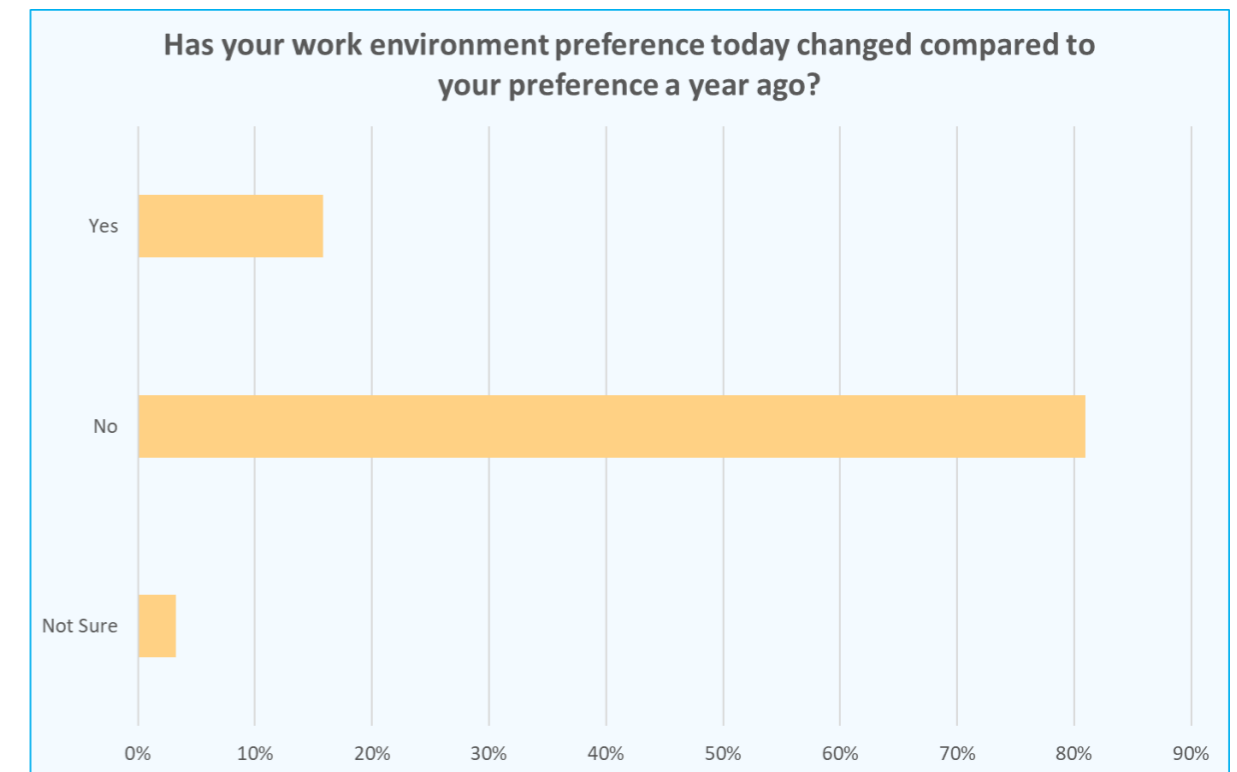
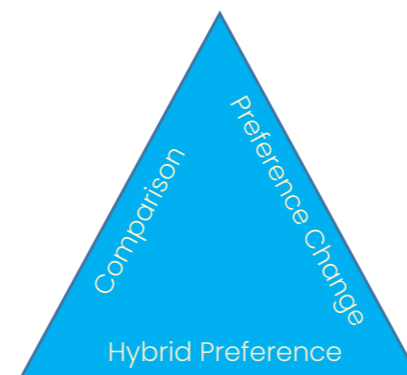
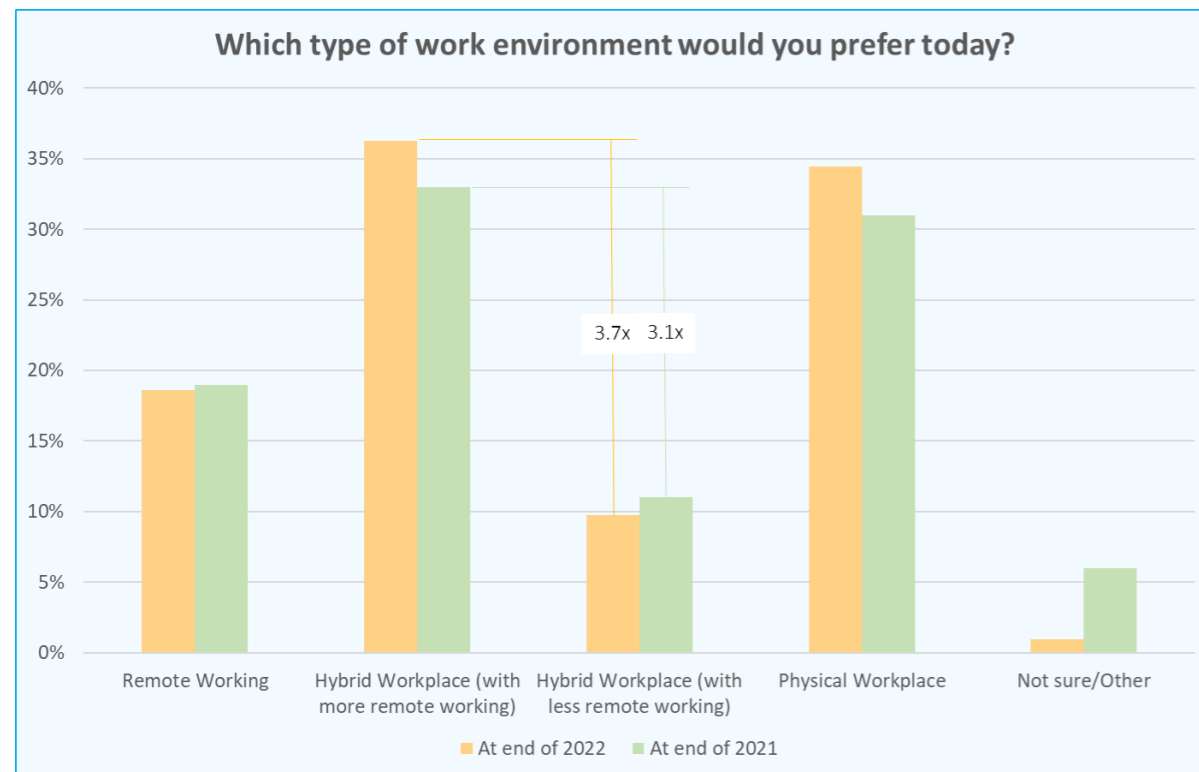
However, for new and necessary changes in workplaces that took place in the aftermath of the pandemic and pandemic-era working arrangements that were reversed in some businesses, our research study shows that employee communications related to workplace changes in 2022 were accomplished mostly in the same or better way than a year ago and support provided to UK workers was more satisfactory to them, which indicates that not reversing some pandemic-era workplace changes was desired or, similarly, a return-to-office when communicated.

- Slightly more UK workers were very satisfied in 2022 with the frequency and clarity of communication with their employer for changes related to their workplace and working arrangements related to their role (31% in 2022 vs 29% in 2021)
- Significantly more UK workers were very satisfied in 2022 with the flexibility of their employer and support that they were provided for changes in their workplace (37% in 2022 vs. 28% in 2021)

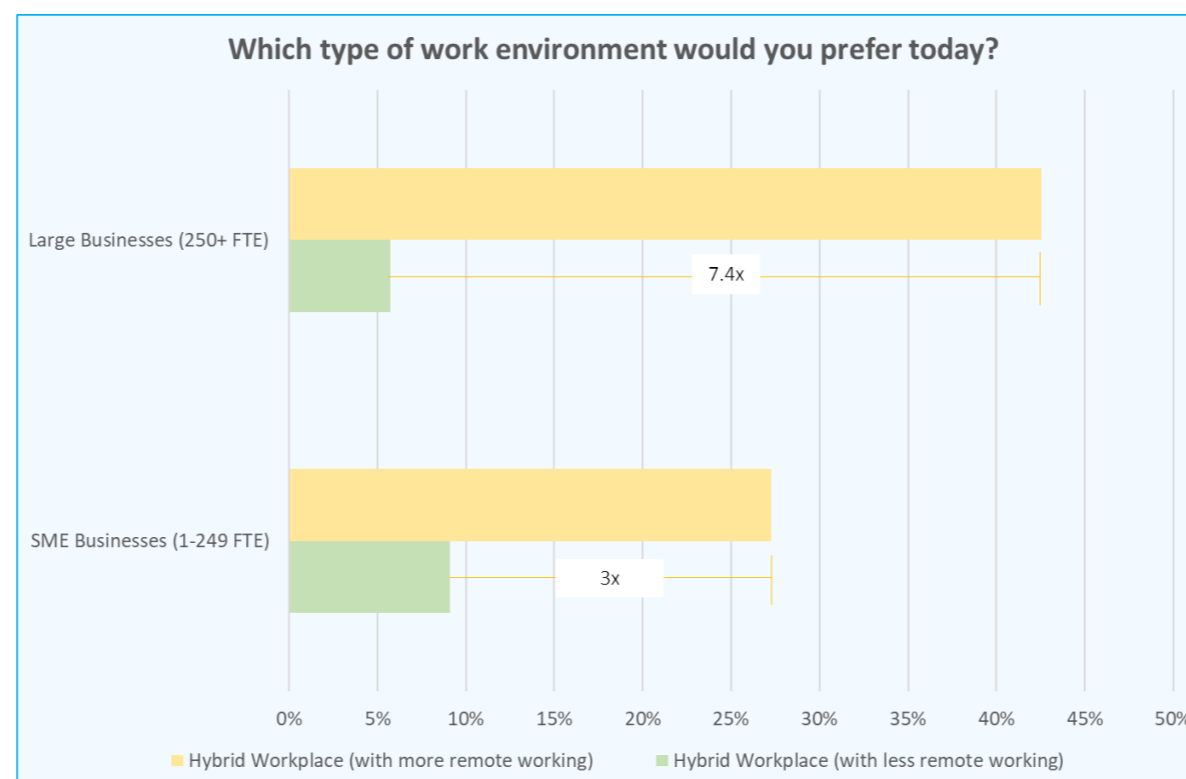


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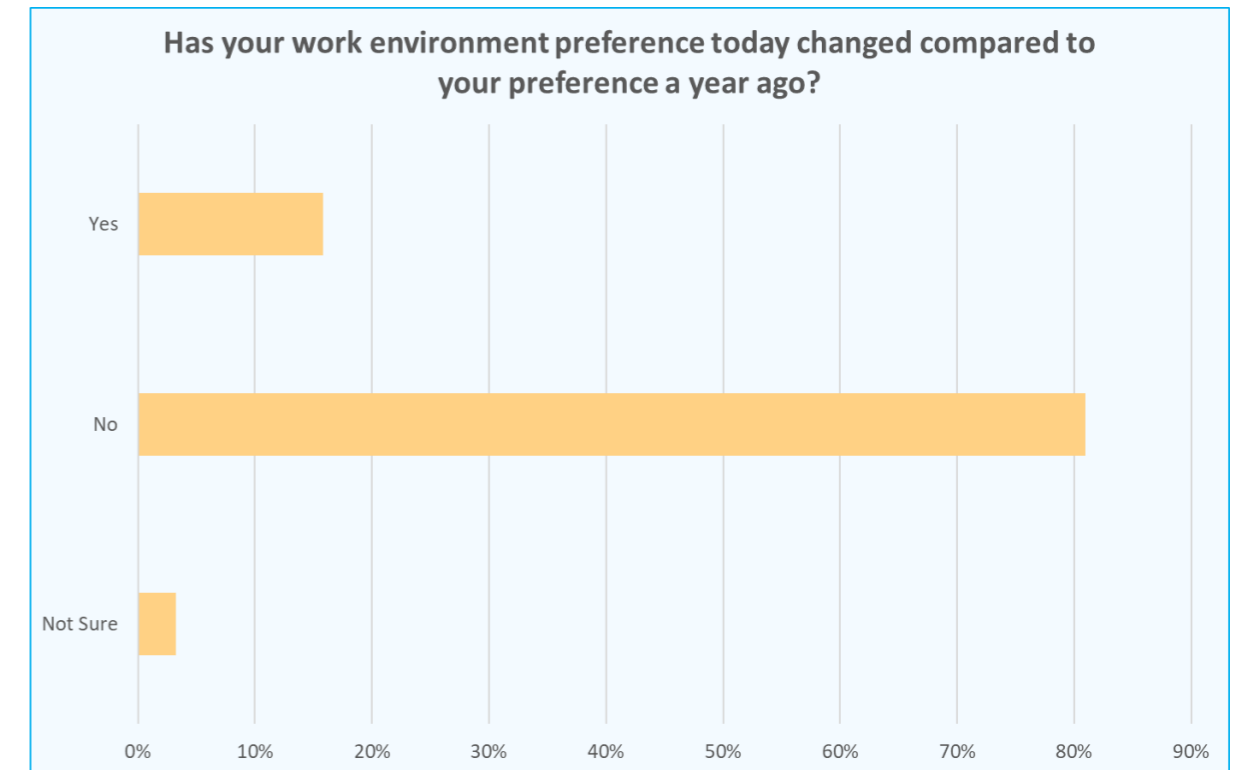
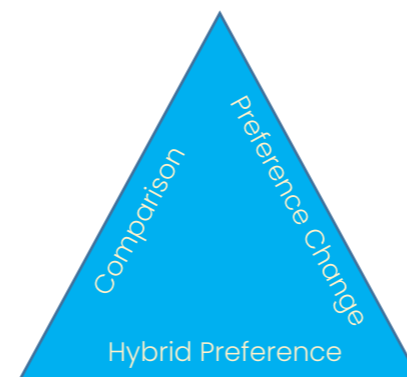
- 19% of UK workers in 2022, almost the same percent from those surveyed in 2021, say that they would prefer to work remotely only. More than 13% of workers that say that they work currently only remotely
- 1 in 3 (34%) of UK workers say that they would prefer to work in a physical environment, significantly lower (by 13%) than the percentage of workers currently working in a physical environment (47%)
- 36% of UK workers prefer to work in a hybrid environment with more remote working. An increase by 3% from 33% in 2021



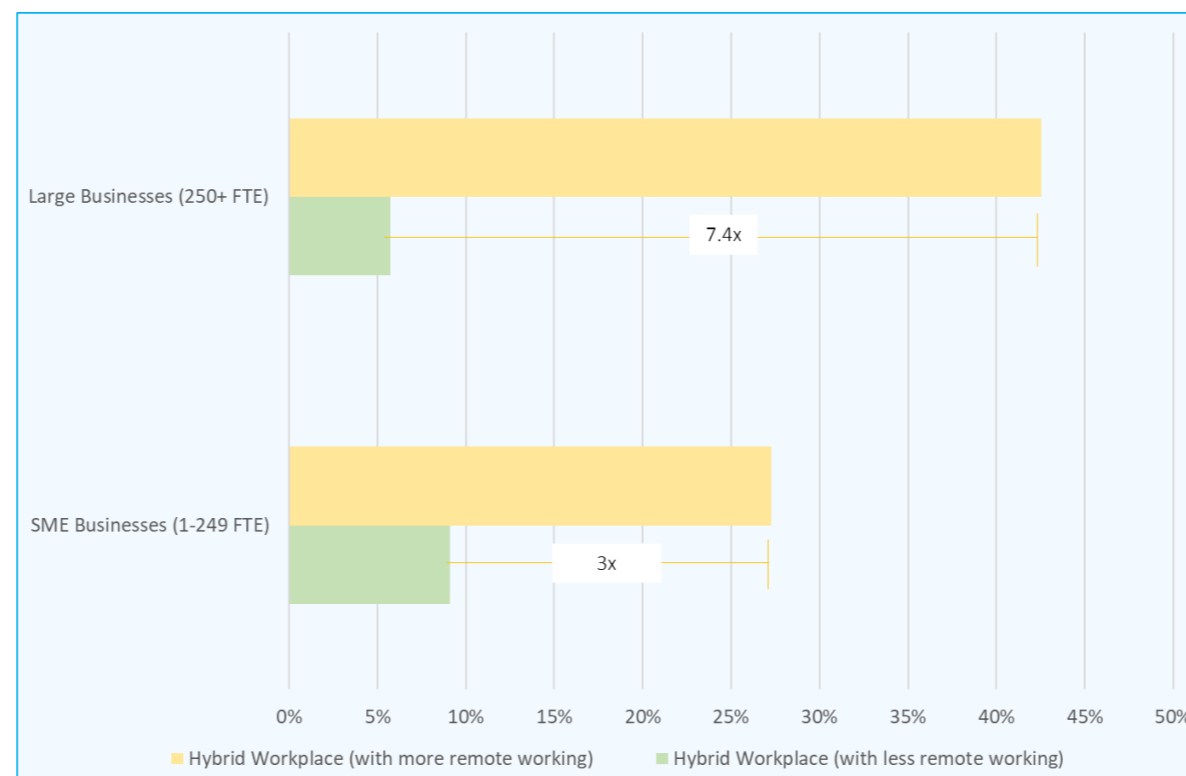
- 4 in 5 (81%) UK workers say that they have not changed their preference since last year about what work environment they would prefer
- Amongst workers that would prefer a hybrid environment, 3.7x would also prefer to have more remote working than less
- For large organisations, 7.4x more workers would prefer a hybrid environment with more remote working than less. This is considerably less than for SME businesses where 3x more workers would prefer more remote working in a hybrid environment and reflects on the fact that many large organisations transitioned their workforces from remote working into hybrid roles during 2022

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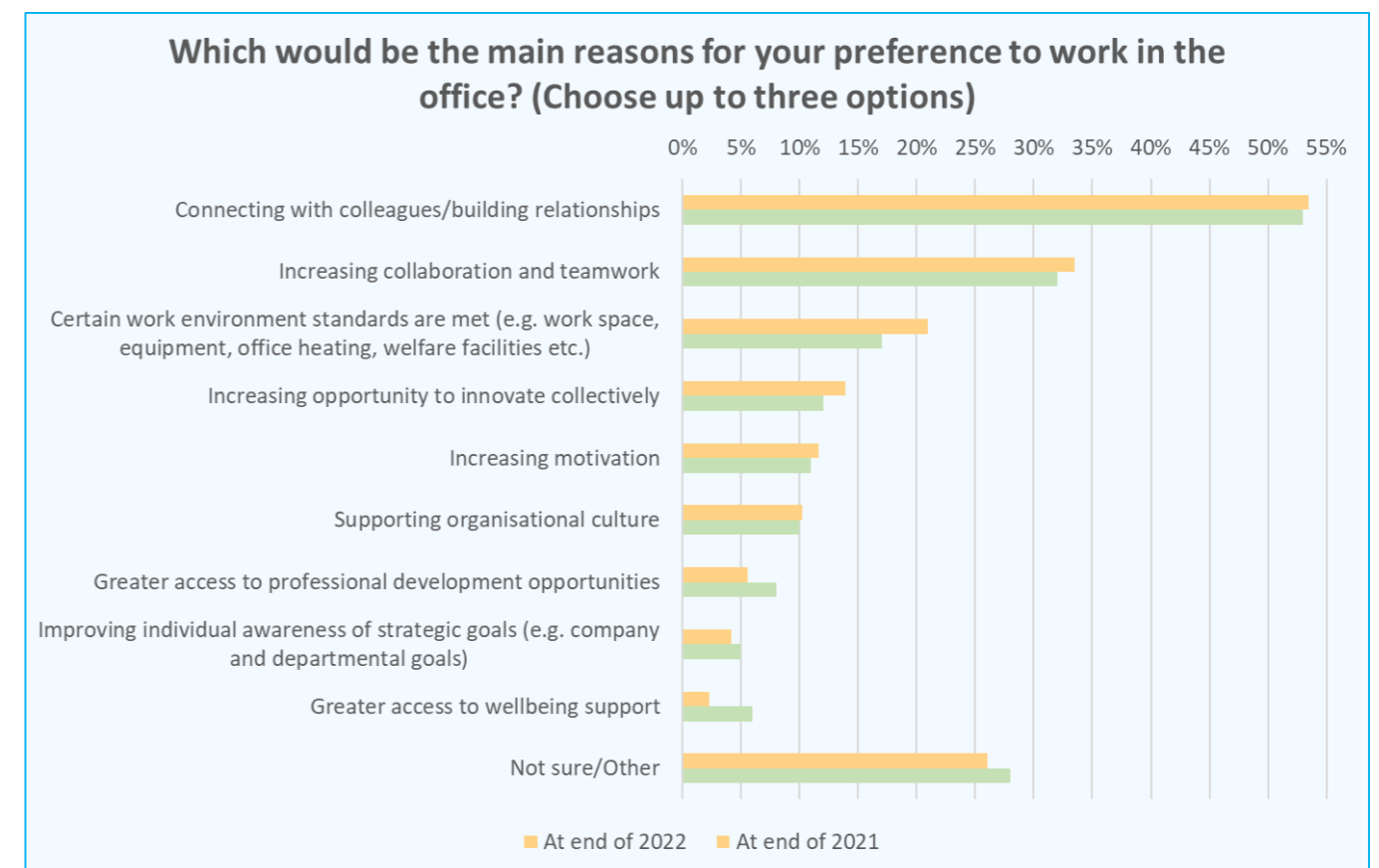
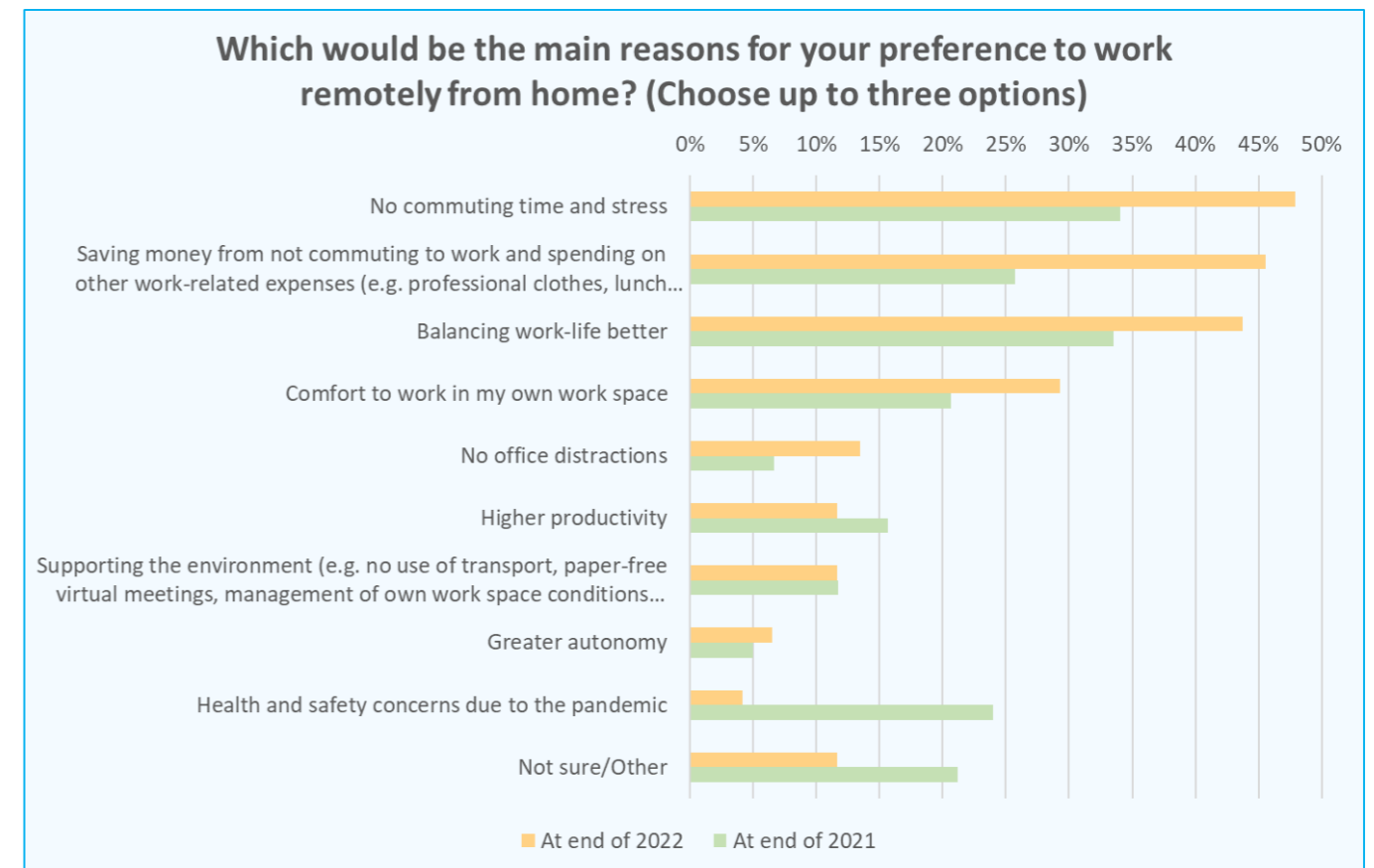


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Cost of living crisis weighs on remote working preference.

While workers that prefer to work in the office have barely changed the reasons for their preference, in our research study this year we have seen a clear change of what drives the preference of workers to work remotely from home. The current cost of living crisis that started in early 2022 has clearly weighed heavily on some of the reasons UK workers say for preferring to work from home, while in the aftermath of the pandemic health and safety concerns have considerably abated.

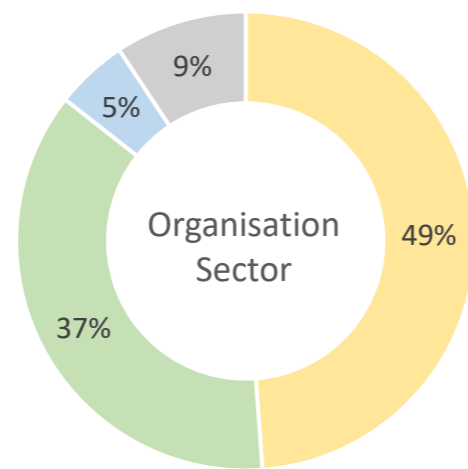
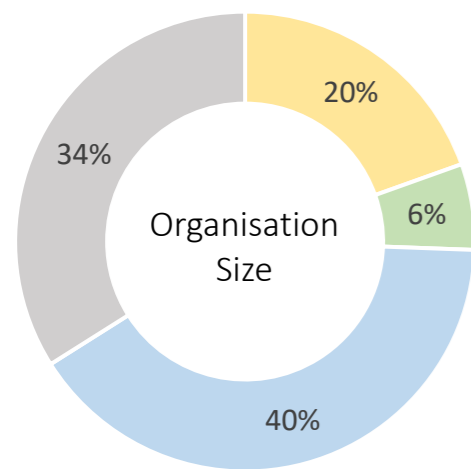
- Time and stress from commuting to the office is the most important reason with almost half (48%) of UK workers citing this reason for preferring to work remotely from home, well above 34% in 2021
- Saving money from not commuting to work and spending on other work-related expenses is the second most important reason amongst workers preferring to work remotely from home, with 45% of workers citing this reason in 2022. This reason registers the highest increase amongst every other reason from 26% in 2021 to 46% in 2022 moving up from third place in 2021 mainly as a result of the current cost of living crisis with increased costs of traveling and an evident squeeze of the finances of UK households
- Balancing work-life better features this year as the third most important reason for workers preferring to working remotely from home, considerably increased to 44% from 34% in 2021
- Comfort to work in my own work space replaced health and safety concerns due to the pandemic in the fourth place with 29% workers citing this reason up from 21% in 2021. No office distractions is also mentioned by almost twice as many workers this year, increased from 7% to 13% and moving up from 9th place to 5th place amongst the most important reasons.
- Connecting with colleagues and building relationships is again the most important reason this year cited by just above half (53%) of workers that prefer to work in the office, same as in 2021
- Increasing collaboration and teamwork is also in second place again of most important reasons with 33% workers mentioning this reason, considerably below the top reason and similar to 32% of workers that mentioned this reason in 2021
- Certain work standards are met is mentioned by 21% of workers this year in third place, slightly above the results last year where 17% of workers had mentioned this reason



About the research

The survey was designed and conducted by Eupnea amongst 215 UK based, full-time employed, participants during the 14th and 15th of December 2022.

Characteristics of UK businesses whose employees participated in this survey:



- Small Businesses (1-49 FTE)
- Medium-Sized Businesses (50-249 FTE)
- Large Businesses (250+ FTE)
- Not Available

- Private Sector
- Public Sector
- Third Sector
- Not Available

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Produced in the United Kingdom January 2023

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