



BELFAST CHAMBER  
**RETURN TO THE WORKPLACE  
2023 SURVEY SUMMARY**

THE VOICE FOR BUSINESS  
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# INTRODUCTION

The COVID-19 pandemic has, thankfully receded but its impact on lots of aspects of our lives continues, not least how we work. Lockdowns meant working from home for many with the 9 to 5 routine disrupted. Whilst some are back at their desks, others aren't and many only occasionally.

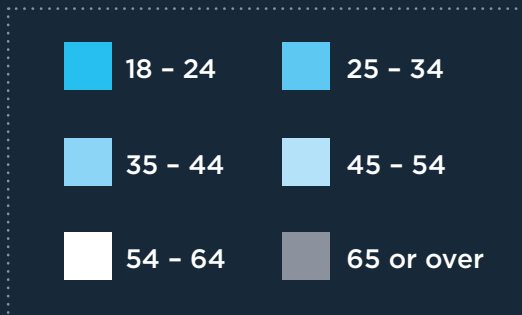
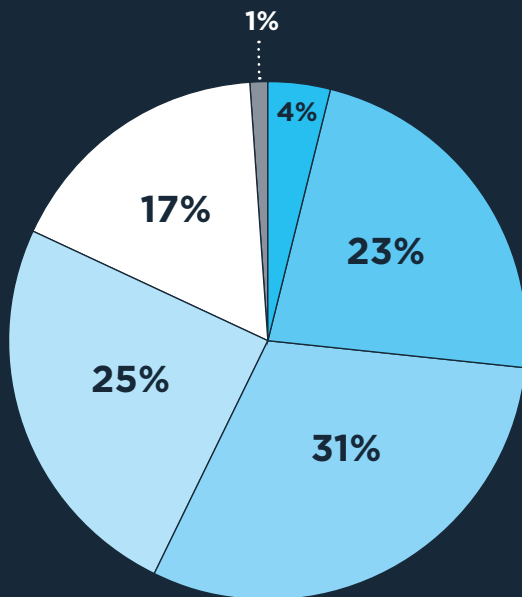
With office-based workers making up such a large percentage of the Belfast workforce, new ways of working will inevitably affect the wider city economy.

Between 30 January and 10 February 2023, Belfast Chamber conducted a 17 question survey of employees across its member companies to ascertain what the 'new normal' of office working in Belfast is and what, in turn, that means for other businesses and services across Belfast's economy.

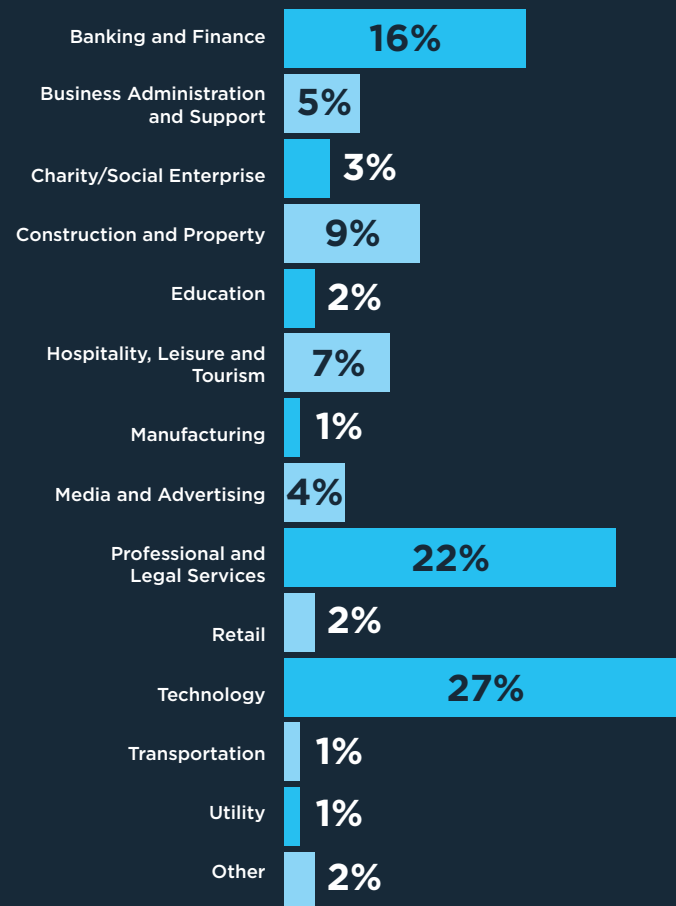
This summary of the 394 responses we received illustrates that the situation has indeed changed quite significantly, posing profound questions for the future of Belfast city centre that we will have to answer if we want our city to continue to be the engine room for our entire region's economy.

# WHO TOOK PART?

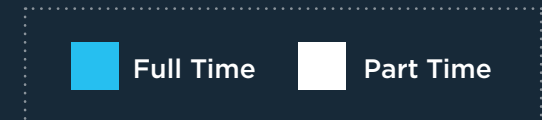
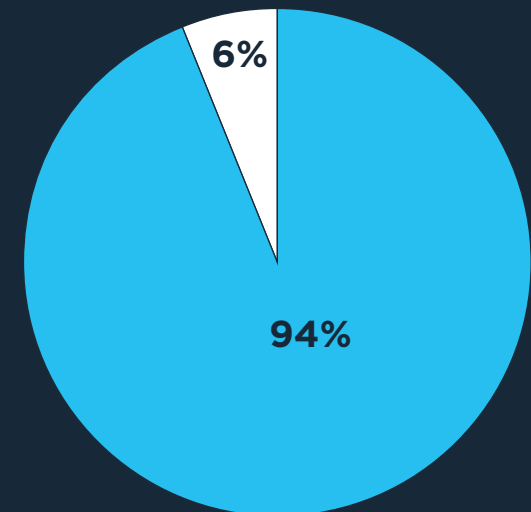
## AGE



## SECTOR

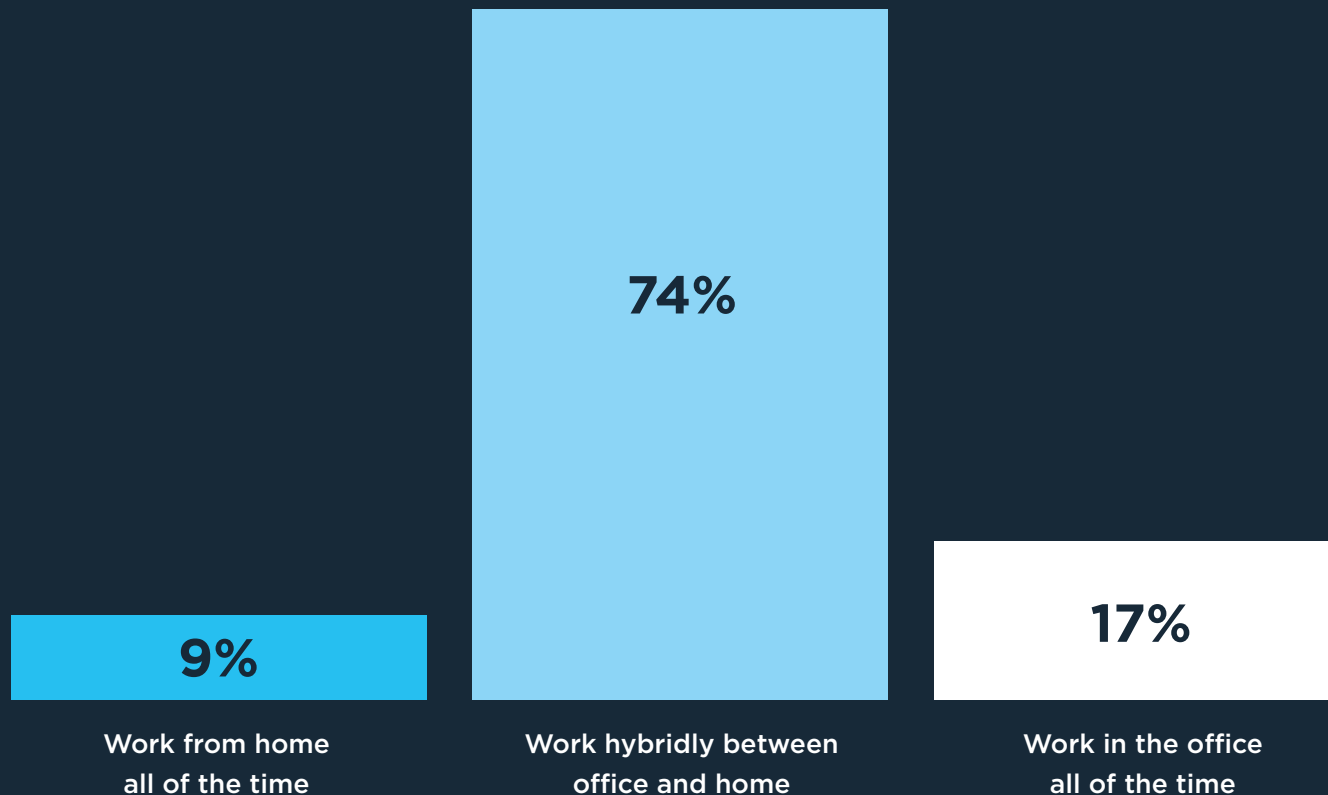


## EMPLOYMENT STATUS



# HYBRID IS THE 'NEW NORMAL'

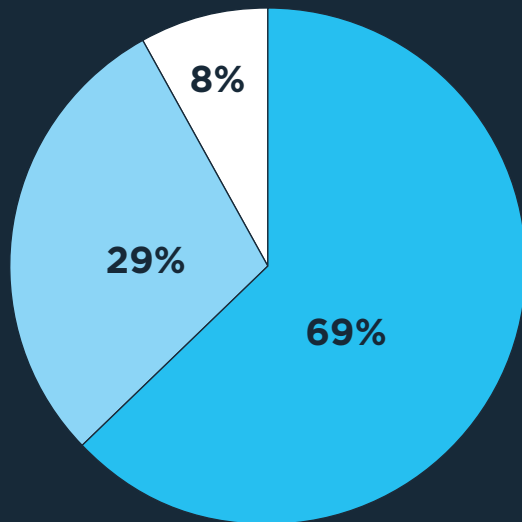
Whilst working home full time all the time is a thing of the past for most of Belfast's office workers, hybrid working has firmly established itself as the predominant way of working with nearly  $\frac{3}{4}$  doing so.



# EMPLOYERS AND EMPLOYEES ARE EMBRACING A NEW WAY OF WORKING

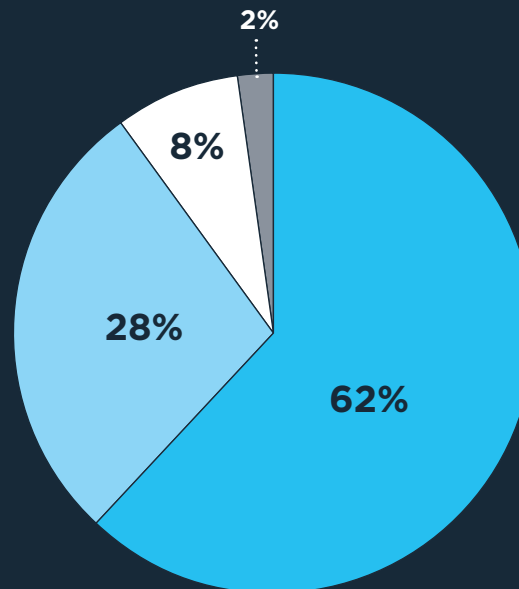
The majority of businesses have implemented a formal return to the workplace policy including elements such as a set number of days in the office and days when entire teams are in the office as well as an emphasis on mental health and wellbeing and bringing colleagues together to socialise. 90% of employees are very or somewhat satisfied with their new working arrangements.

**Does your company have a return to the workplace policy?**



■ Yes   
 ■ No   
 ■ In the process of being implemented

**Are you satisfied with the arrangements your employer has put in place?**



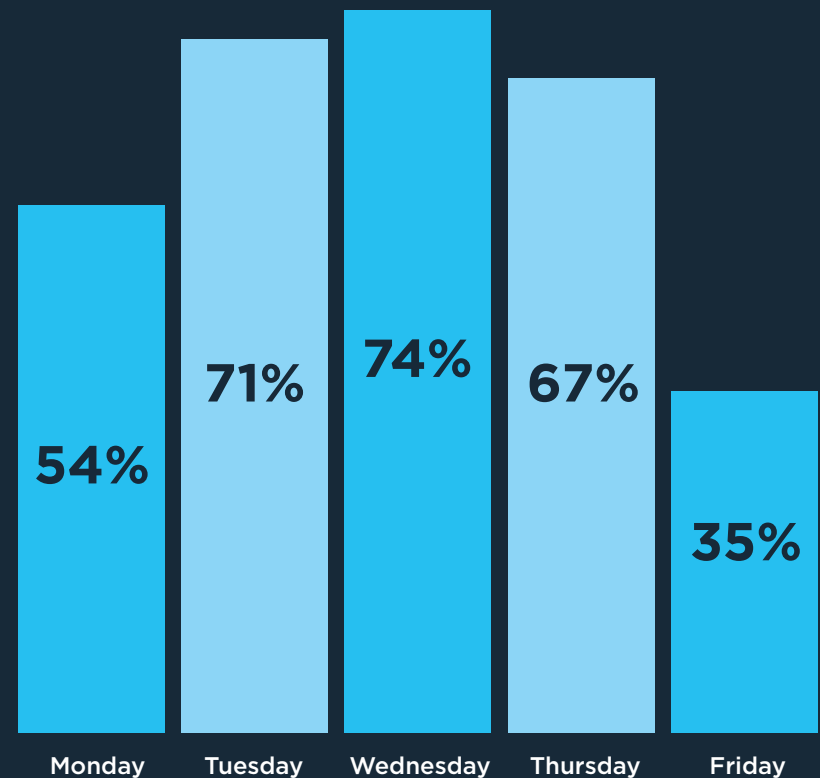
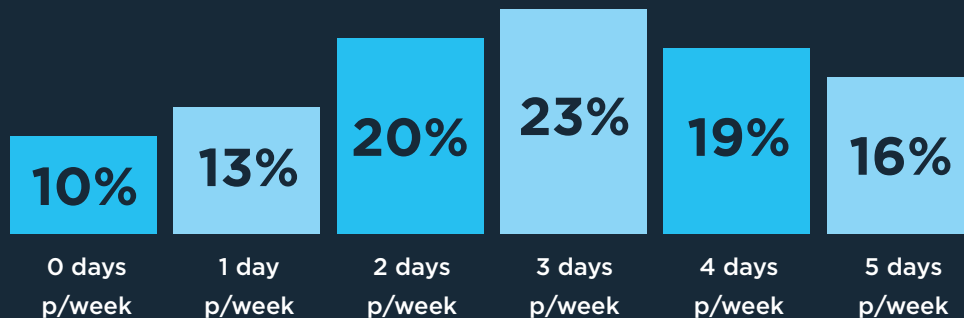
■ Very satisfied   
 ■ Somewhat satisfied  
■ Somewhat dissatisfied   
 ■ Very dissatisfied

**What does your workplace policy include?**



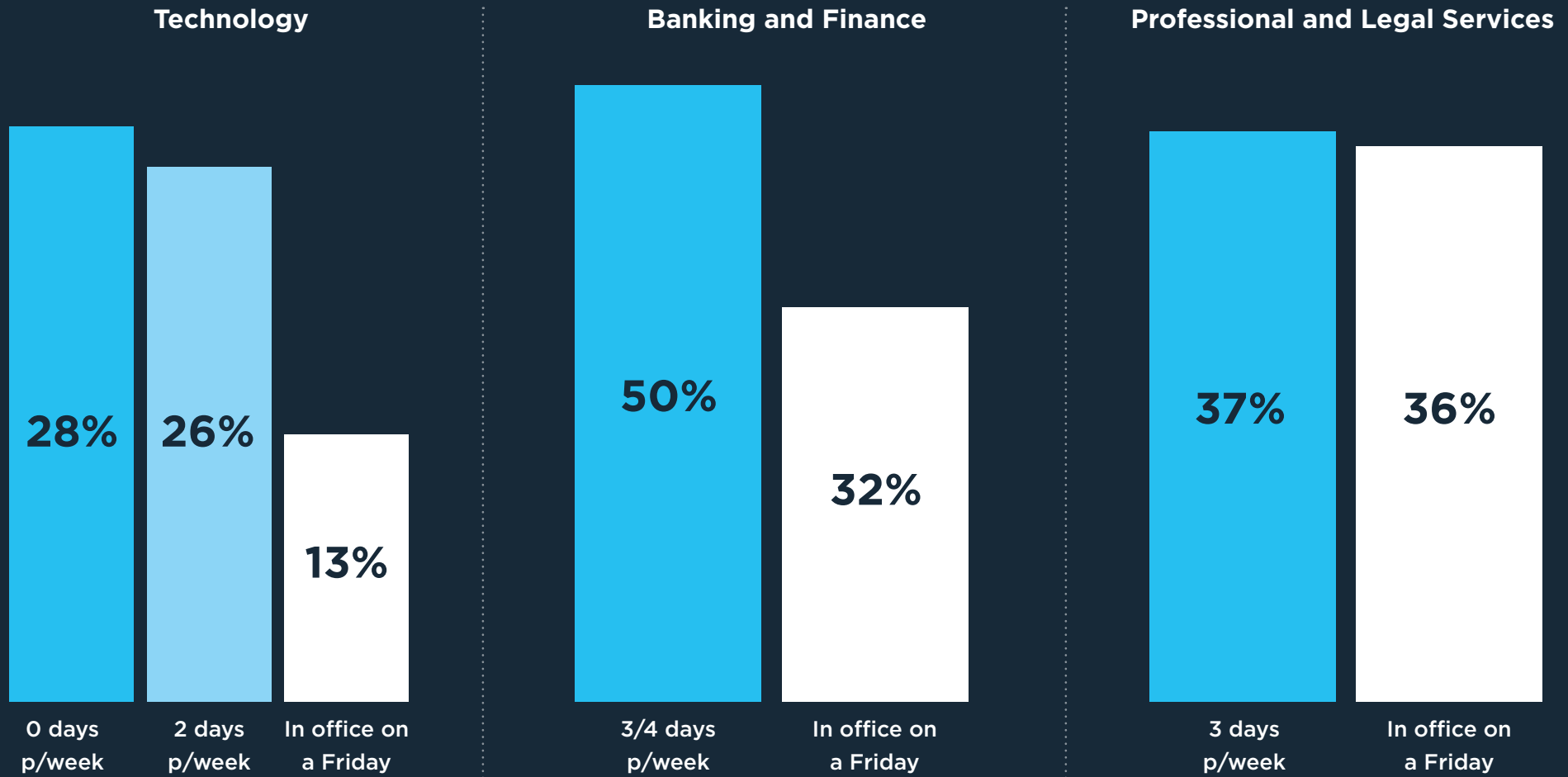
# NO MORE 9 TO 5, MONDAY TO FRIDAY?

The prevalence of hybrid working has reshaped the working week away from 5 days a week in the office to a situation where the average Belfast office based worker is at their desk 3 days a week with those three days more likely to be Tuesday, Wednesday and Thursday. Just over half of workers are in the office on a Monday and little over a third on a Friday, with Wednesday the most popular day to be in the office.



# DISTINCT DIFFERENCES BETWEEN SECTORS

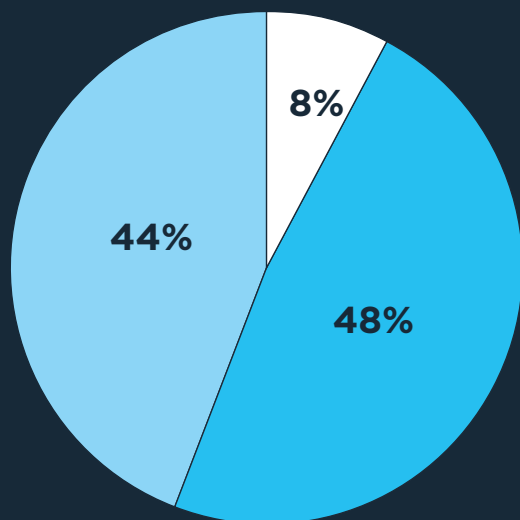
The survey results show that there are clear differences in post-pandemic work patterns between the different sectors of the Belfast economy with those working in Technology in their offices much less on average than sectors like Banking and Finance and Professional and Legal Services.



# THE IMPACT ON SHOPS AND SERVICES

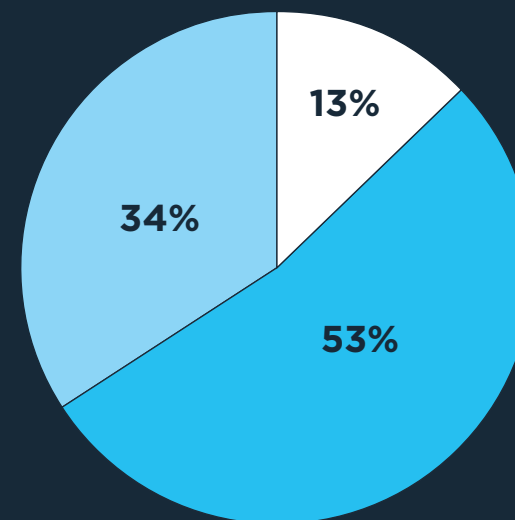
A majority of employees are using Belfast city centre’s shops and services more or the same as before the pandemic although respondents said their spending was down, but this may be more to do with the current cost of living crisis. Recent footfall and sales data does show that both are up in Belfast city centre accounted for by, perhaps, other demographics like students and tourists.

**Using Businesses since the Pandemic**



- Using businesses more than before the pandemic
- Using businesses less than before the pandemic
- Using businesses about the same as before the pandemic

**Spending in Belfast city centre’s shops since the Pandemic**



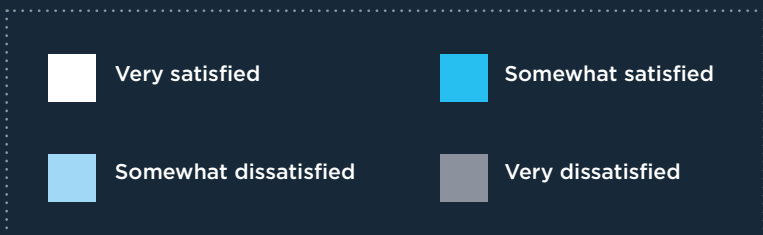
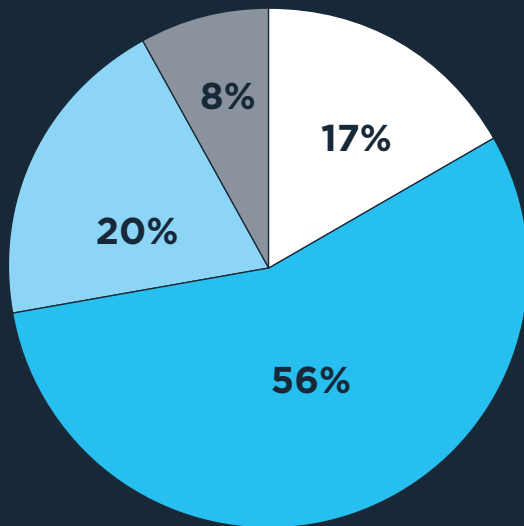
- Spending more than before the pandemic
- Spending less than before the pandemic
- Spending about the same as before the pandemic



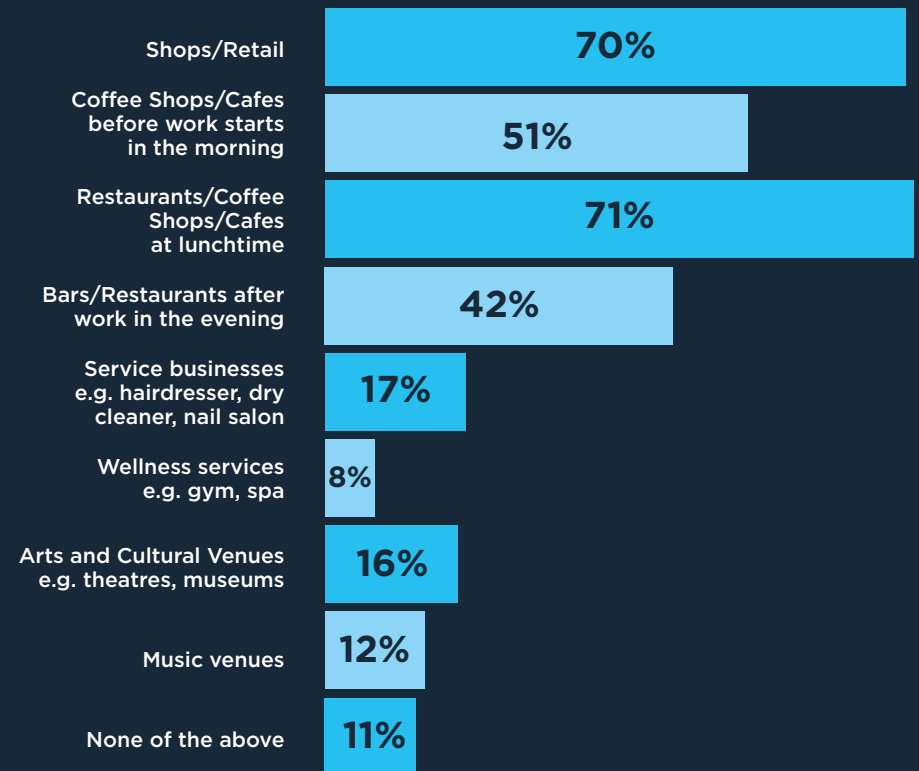
# PEOPLE REMAIN SATISFIED WITH THE CITY CENTRE'S OFFERING

A clear majority of respondents rate positive levels of satisfaction with Belfast city centre's retail, hospitality and cultural offering with shops and lunchtime in cafes and restaurants remaining popular. Just over 2 in 5 employees however are going to bars or restaurants after work in the evening and 11% of respondents aren't using any shops or services at all.

Are people satisfied with the city centre's offerings



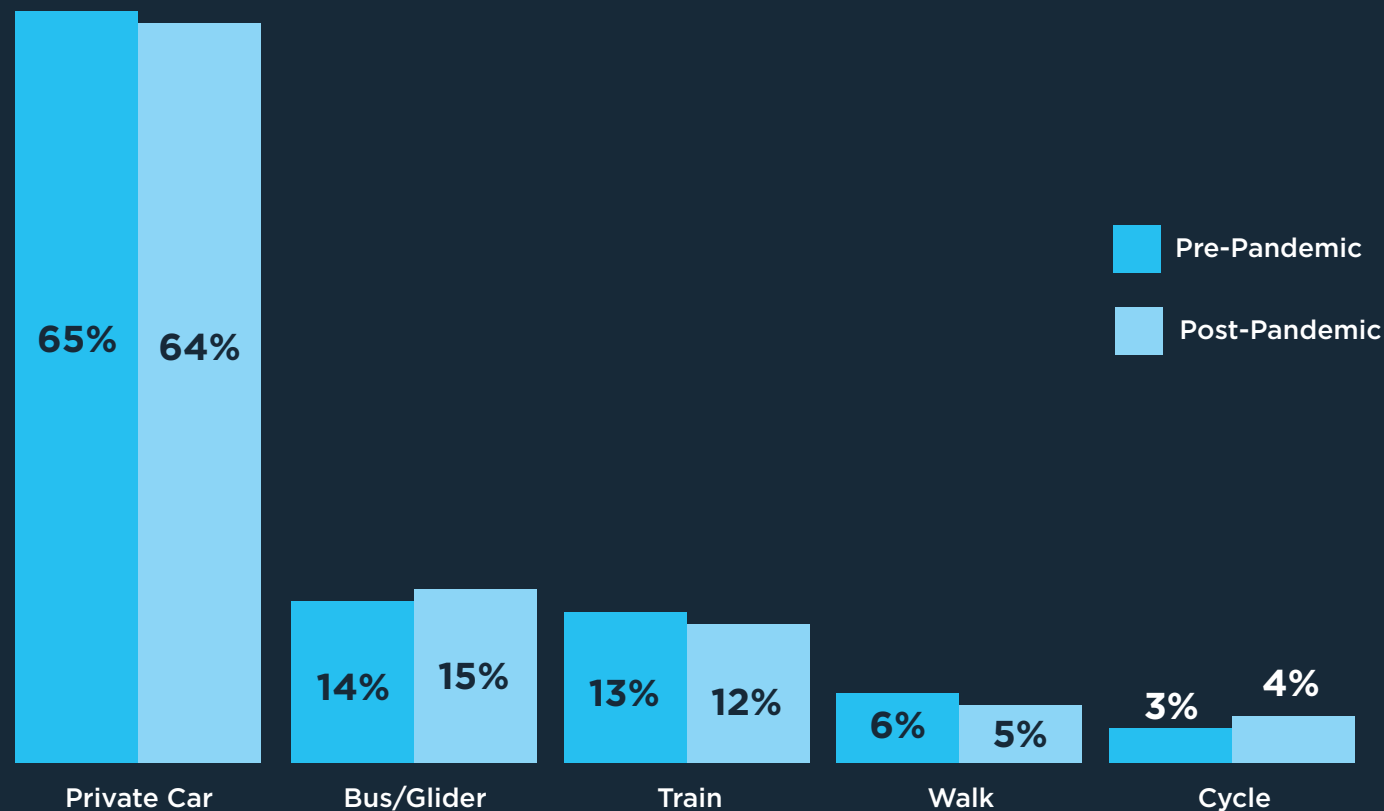
City centre's offerings that are used



# NO DISCERNIBLE CHANGE IN WAYS OF COMMUTING

Our survey shows no significant shift in how Belfast based office workers are commuting with a very slight decrease in private car usage and some movement between different forms of public transport and modes of active travel.

How Belfast based workers commute Pre-Pandemic/Post-Pandemic





**BELFAST**  
CHAMBER