



**WESTERN  
DEVELOPMENT  
COMMISSION**

# Remote Work – Pre and Post Pandemic Trends

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**18 January 2023**



**WESTERN  
DEVELOPMENT  
COMMISSION**

- 7 county Western Region
- Non Commercial State Agency under Department of Rural & Community Development
- WDC Act 1998

*'...foster and promote the economic and social development of the Western Region'*

**Our work is built on 3 key pillars:**

- Regional promotion
- Regional leadership
- Sustainable enterprise



# Presentation Outline

- Results of Annual WDC-UoG RW Survey April 2022
- Trends in RW pre, pandemic and post pandemic –CSO Labour Force Survey
- Work from home potential
- Border patterns, commuting & RW
- Policy Conclusions



# NATIONAL REMOTE WORKING IN IRELAND EMPLOYEE SURVEY

# 8,428

respondents



## OF THE 50%

OF RESPONDENTS WHOSE  
ORGANISATIONS HAVE  
CONFIRMED THEIR FUTURE  
WORKING PATTERNS:



will work  
hybrid



will work  
fully remotely



will work  
fully onsite

ARE REMOTE WORKING PREFERENCES BEING FACILITATED?

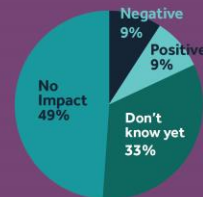


CONFIRMED  
FUTURE HYBRID  
WORK  
PATTERNS



\*12% selected  
the "other" option

IMPACT OF  
REMOTE  
WORKING ON:



Opportunities  
for Promotion

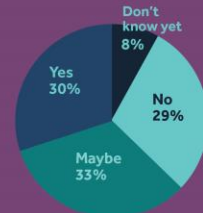


Career  
Options

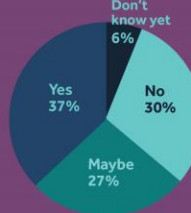


Loyalty to  
Employer

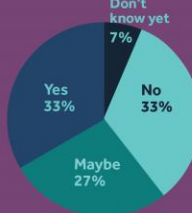
IF REMOTE  
WORKING  
PREFERENCES  
ARE NOT  
FACILITATED



Change job even if  
it means a pay cut



Change job even if  
it means less promotion  
opportunities



Change job even if  
it reduces career  
opportunities

## REMOTE WORKING AND CAREERS

### 27% CHANGED EMPLOYER SINCE COVID-19

For those who  
changed employer,  
47% said  
remote  
working  
was a  
key factor



### 73% HAVE NOT CHANGED EMPLOYER

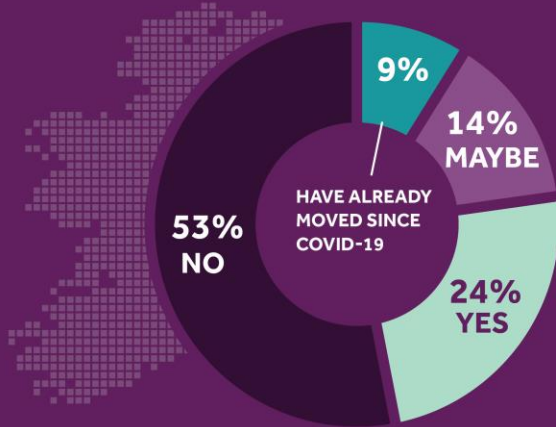


# NATIONAL REMOTE WORKING IN IRELAND EMPLOYEE SURVEY AND RELOCATION



## APRIL 2021

BASED ON YOUR  
EXPERIENCE OF  
REMOTE WORKING  
SINCE COVID-19,  
WOULD YOU  
CONSIDER  
RELOCATING?



FOR THOSE WHO HAVE ALREADY  
MOVED, TOP 3 REGIONS  
MOVED TO:

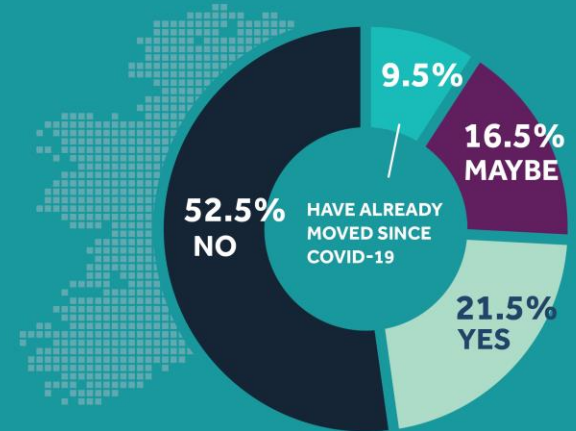
- 1 West: Galway, Mayo, Roscommon
- 2 South-West: Cork, Kerry
- 3 Border: Cavan, Donegal, Leitrim, Monaghan & Sligo

FOR YES AND MAYBE ABOVE...  
TOP 3 REGIONS THEY WOULD  
MOVE TO:

- 1 Outside Ireland
- 2 West: Galway, Mayo, Roscommon
- 3 South-West: Cork, Kerry

## APRIL 2022

BASED ON YOUR  
EXPERIENCE OF  
REMOTE WORKING  
SINCE COVID-19,  
WOULD YOU  
CONSIDER  
RELOCATING?



FOR THOSE WHO HAVE ALREADY  
MOVED, TOP 3 REGIONS  
MOVED TO:

- 1 West: Galway, Mayo, Roscommon
- 2 Mid-East: Kildare, Louth, Meath, Wicklow
- 3 South-West: Cork, Kerry

FOR YES AND MAYBE ABOVE...  
TOP 3 REGIONS THEY WOULD  
MOVE TO:

- 1 Outside Ireland
- 2 Mid-East: Kildare, Louth, Meath, Wicklow
- 3 West: Galway, Mayo, Roscommon and South-West: Cork, Kerry (joint 3rd)

# Working from Home Pre and Post Pandemic

- CSO – LFS Qtr 1 (Jan-March)
- ‘Usually’ = At least half the days worked at home.
- ‘Sometimes’ = At least one hour from home in the last 4 weeks.
- Both a type of blended/hybrid – between 1 and 4 days per week.



**Contents**

- Introduction
- Working from Home 2022
- Working Usually from Home 2022
- Working Sometimes from Home 2022
- Trends 2018-2022 – Usually Working from Home
- Trends 2018-2022 – Sometimes Working from Home
- Working from Home Potential
- Regional Sectoral Employment and work from home potential
- Policy Conclusions

**Introduction**

The pandemic prompted a huge shift to working from home, though there was some evidence of an increase in the trend before 2020, see [here](#) for trends national and regionally up to 2020. Examining the data (albeit relatively limited) over the longer term, there is some indication of a correlation between the economic cycle and levels of employment and the relative incidence of remote working. In periods of full or close to full employment the level of remote working increases and in periods of high unemployment the rate is lower. See [here](#) for a discussion on longer term trends related to economic cycles and the labour market.

However, this pattern of remote working all occurred pre pandemic. There are also regional differences evident, before, during and since the lifting of pandemic workplace restrictions. It is only now with the lifting of Government guidelines on working from home, that we can review the evidence pre, during and post pandemic and question has there been a pandemic effect?

In this Policy Briefing, I examine the regional and national data on working from home in the first quarter of early 2022. Following this I review trends over the past 4 years and consider what the outlook and new normal might be. Employment change by industry is examined and I consider the impact this may have on differing levels of working from home across regions.

**Working from Home 2022**

The CSO Labour Force Survey (LFS) data includes a question on working from home and data from 2022 is now available. While the phenomenon of remote working has taken on a much greater significance since the pandemic and can include not just home working but also working from a co-working or hub space, working from home is a very significant element of working remotely<sup>1</sup>. For this reason the LFS time series data is a useful data set.

The CSO Labour Force Survey asks how often you worked at home. The definitions are as follows:

- If you worked for at least one hour from home in the last four weeks, it is categorised as ‘sometimes works from home’.
- If the response is ‘At least half of the days worked at home’, then it is categorised ‘as usually works from home’.

<sup>1</sup> In terms of preferences, up to 8% of survey respondents expressed an interest in working sometimes from a hub. <https://westdev.com/en/ir/wp-content/uploads/2022/05/Briefing-Working-Survey-Report-2022-1.pdf>

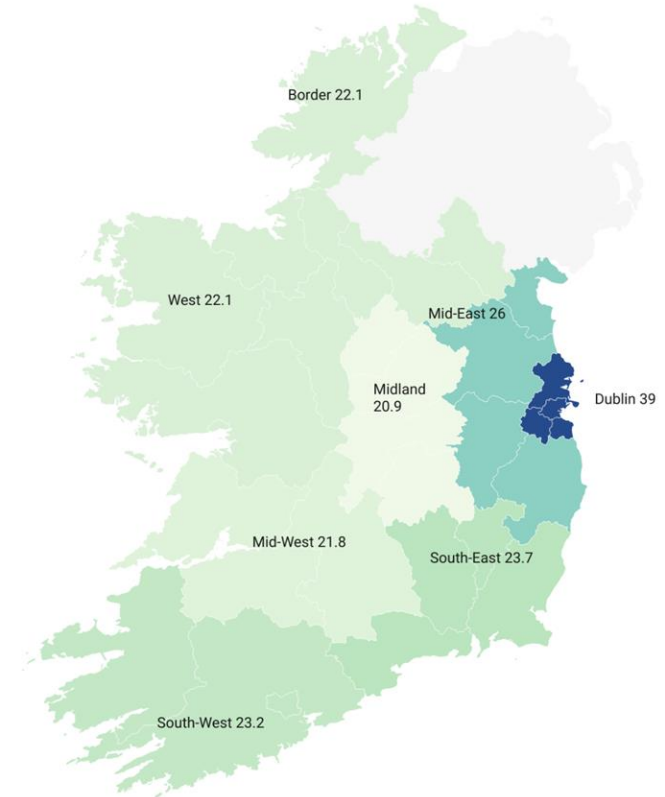


## 'Usually' working from home 2022

- Nationally 28% 'usually' working from home
- Important regional differences.  
Highest = Dublin 39%, then the Mid-East 26%.
- Lowest is Midlands; 20.9%. (18 percentage points between lowest and highest)

### Percentage of employment Usually working from Home Q1 2022

% of those in employment usually working from home



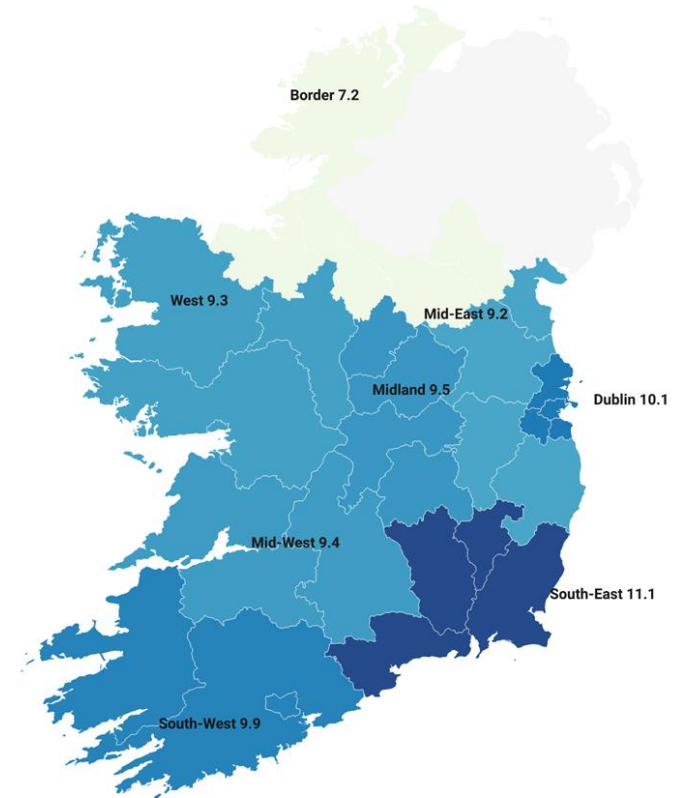
## ‘Sometimes’ working from home in 2022

- Nationally rate is 9.6%.
- Regional pattern is different.
- South East highest (11.1%), Border region lowest (7.2%).
- Differential between regions is much lower (3.9 percentage points)
- Patterns in ‘usually’ & ‘sometimes’ informed by pandemic guidance

### Percentage of employment Sometimes working from Home Q1 2022

% of those in employment usually working from home

7.2 11.1

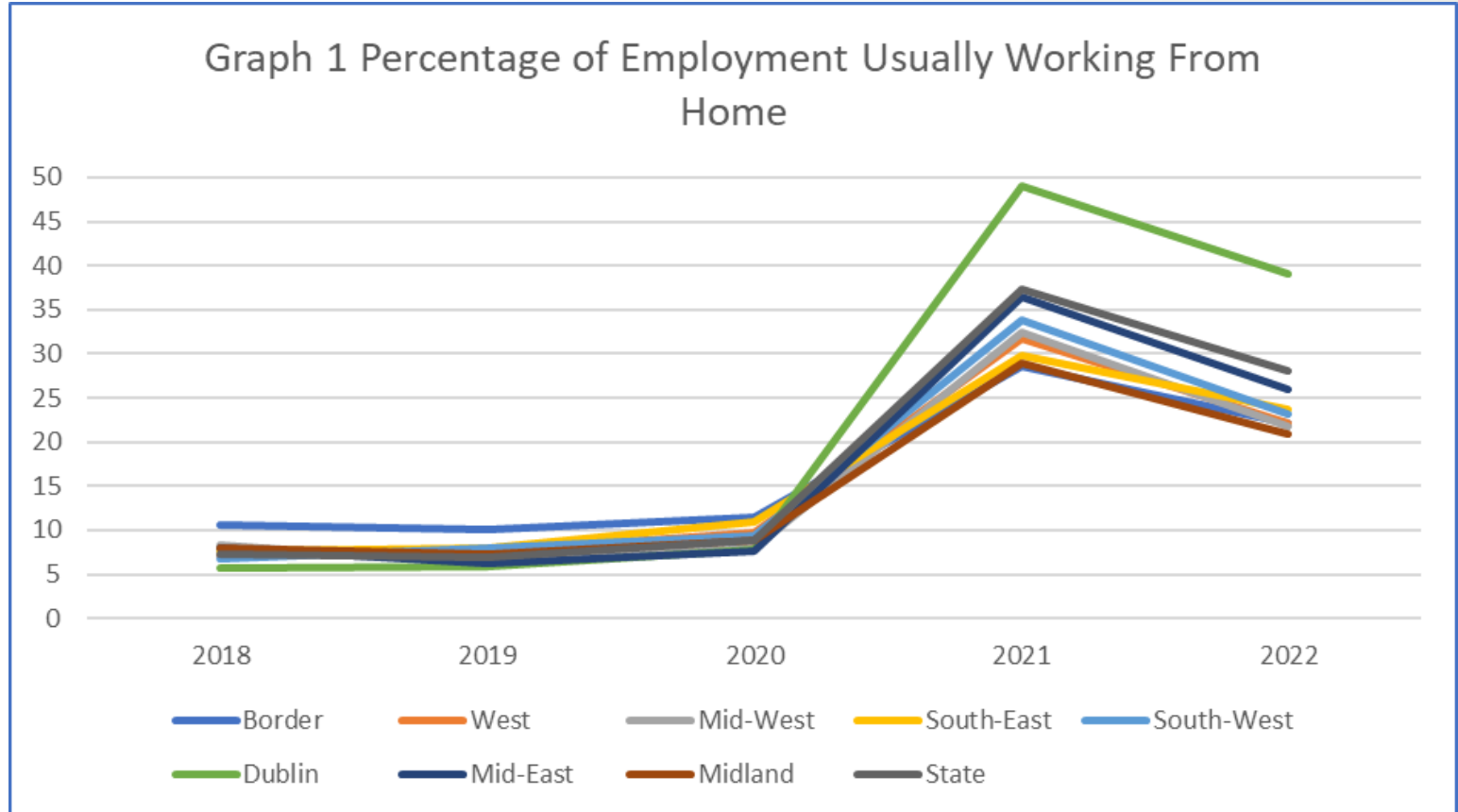






# Trends in Usually Working from Home 2018-2022

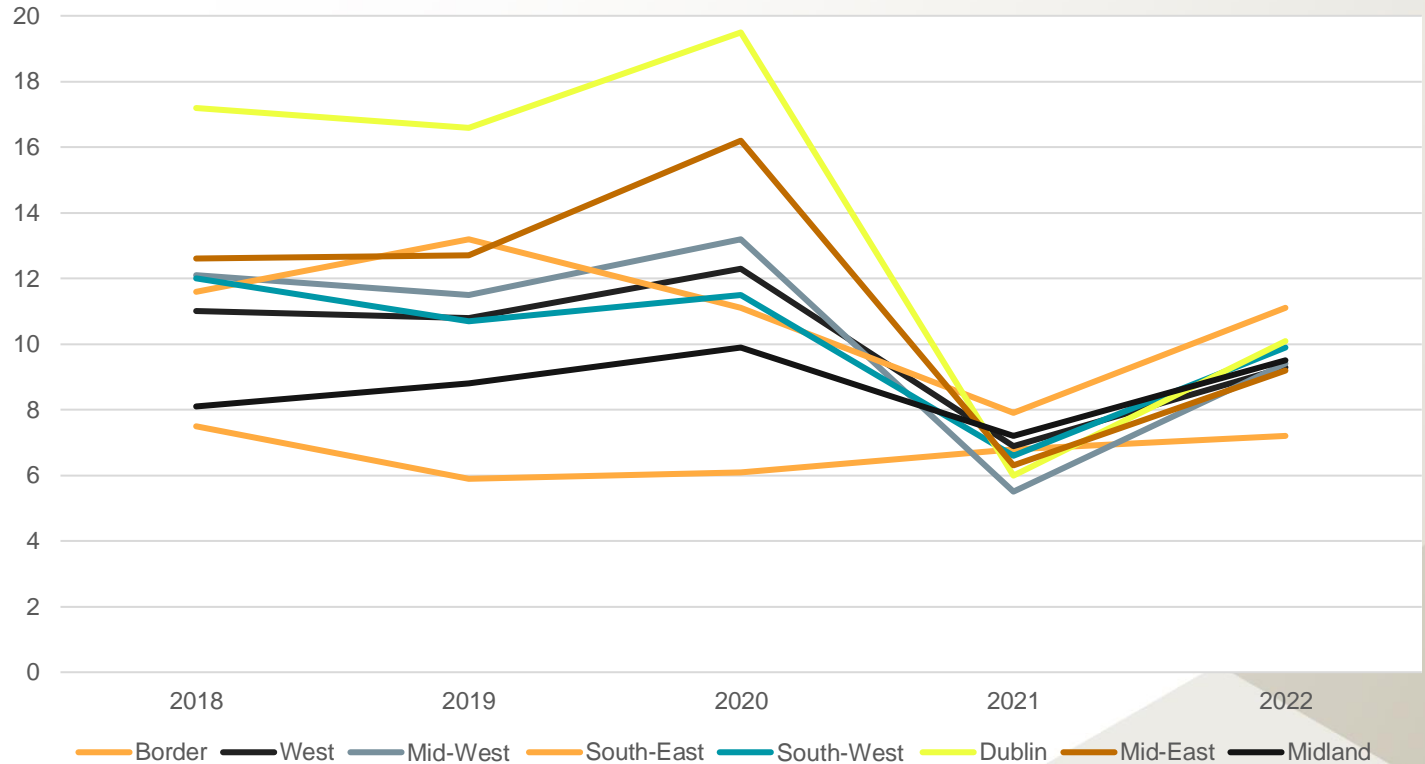
Graph 1 Percentage of Employment Usually Working From Home





# Trends in Sometimes Working from Home 2018-2022

Graph 2 Percentage of Employment Sometimes Working from Home





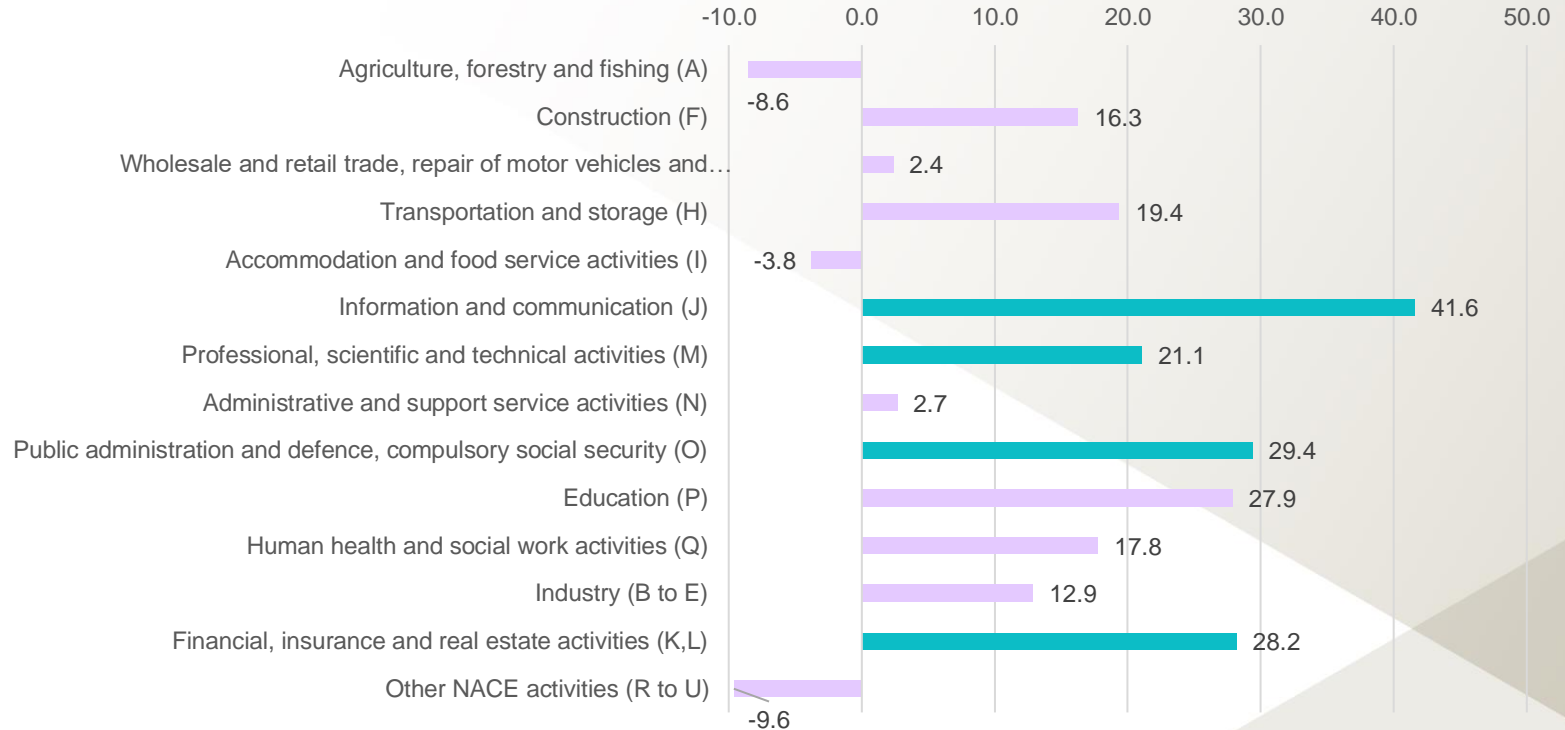
## 'Working from Home Potential'

- Some occupations and industries more suited to RW.
- Research from US suggests 37% of jobs (an average), Nordic figures similar. Comprising 4 sectors: ICT, Prof& Scientific, Public admin, Financial, Ins & Real estate
- Occupation & Sectoral geographic distribution AND changes in occ & sec employment are important factors.



# Change in Employment by Sector 2018-2022

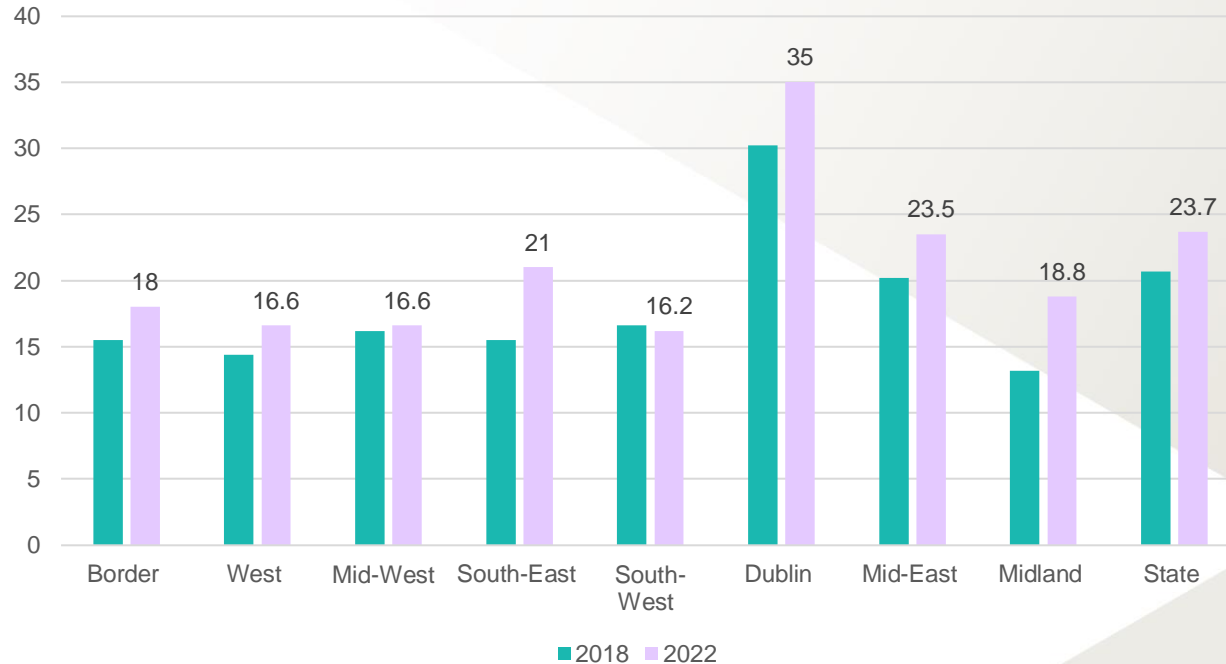
Graph 4. % Change in Total Employment by Sector 2018-2022





# Share of employment in sectors with high 'work from home potential' 2018-2022

Graph 5. Share of employment in sectors with high 'Work from Home' potential'



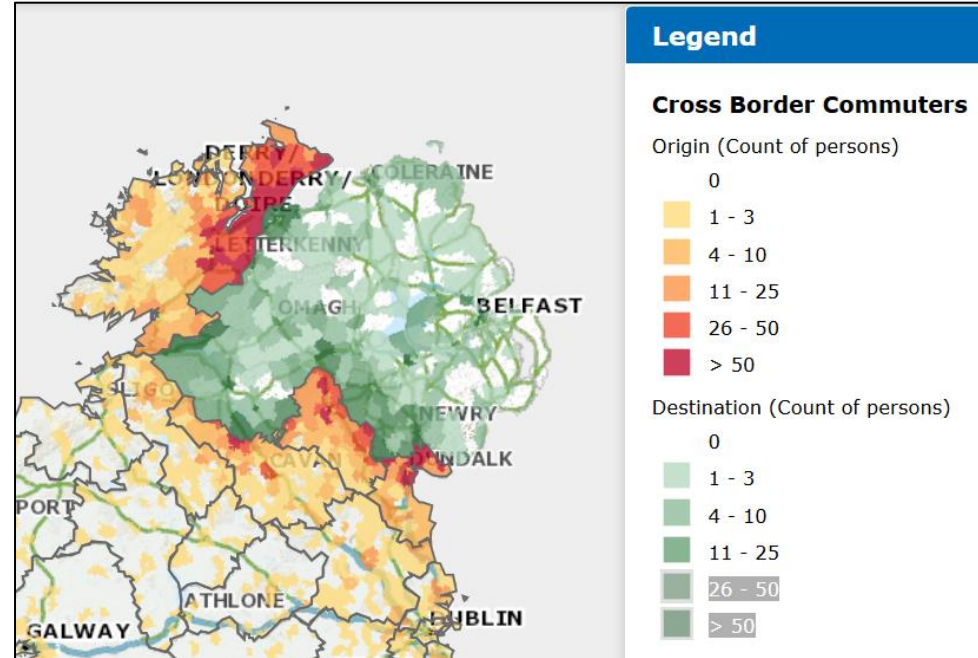


## Regional Issues – The Border region

- Sectoral / Occupational Profile
- Sample sizes & Special Run (CSO)
- WDC observations – wfh – capturing agric, self-some self emp ...
- Cross border commuting patterns Census 2016

## Cross border commuting (Census 2016)

- Most significant commuting between Donegal & Derry-Letterkenny & Inishowen peninsula
- [https://www.cso.ie/en/media/csoie/newsevents/documents/census2016profile6-commutinginireland/Cross\\_Border\\_Commuters\\_2016\\_v2.pdf](https://www.cso.ie/en/media/csoie/newsevents/documents/census2016profile6-commutinginireland/Cross_Border_Commuters_2016_v2.pdf)



## Key Findings – Commuting from Donegal

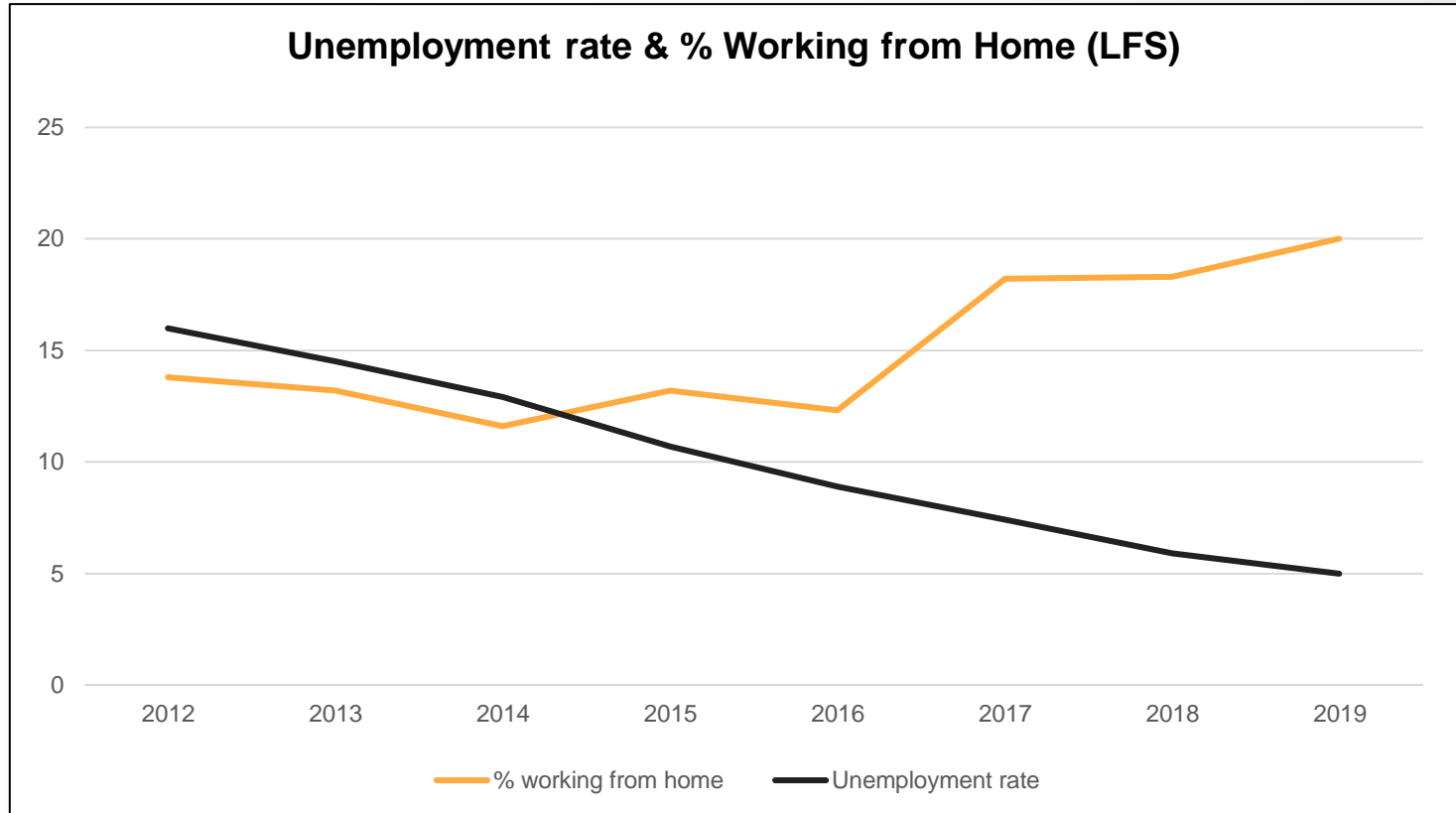
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- Nearly 10,000 (9,336) people crossed the border for work & school, (Census 2016)
- Workers made up three quarters, 7,037 of commuters, up 10% on 2011, while students accounted for the remainder (2,299 down 26%).
- Donegal accounted for the largest number of cross border commuters, with 5,600 commuters, 76 per cent of whom travelled to Co. Derry

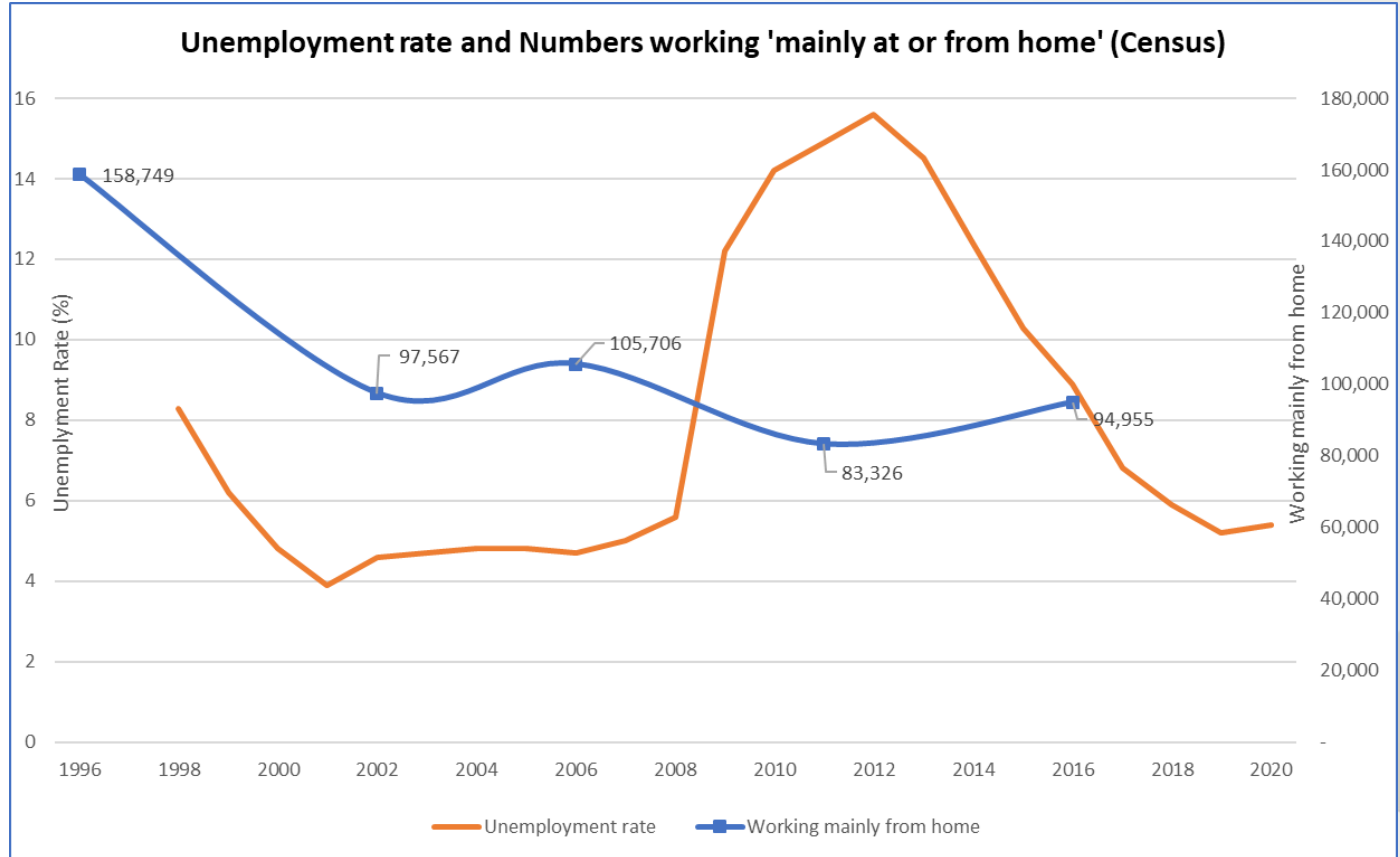




# Unemployment and Working from Home 2012-2019 (LFS)



# Unemployment & Working from Home (Census) 1996- 2020





## Policy Conclusions

- Remote work & WFH – ‘new normal’ still not clear but a pandemic effect is evident with much higher wfh rates (1) PP (2) regionally esp in GDA
- Factors determining rates will be
  - (1) sectoral/occ profile of emp
  - (2) Employer support
  - (3) Govt support
  - (4) Unemployment
- Regional diversity of employment in the context of WFH but generally too- sector specific shocks will have more severe impacts on economies that are not diverse.
- Further analysis to follow incl Census results.



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# Thank You!

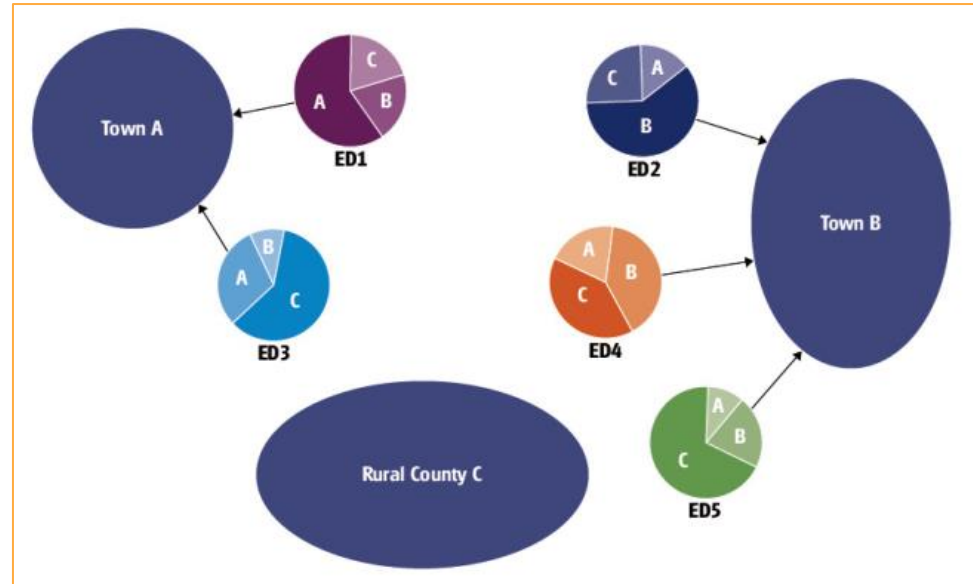
[Contact: deirdrefrost@wdc.ie](mailto:deirdrefrost@wdc.ie)

<https://westerndevelopment.ie/insights/>



## Labour Catchments (Census POWSCAR 2016)

- Travel to work areas – (TTWAs) origin & destination data - POWSCAR
- Allocation of EDs to a town's labour catchment ( WDC, 2009)
- EDs assigned to towns with a pop greater than > 1,000
- On the basis of where the highest no travel to.



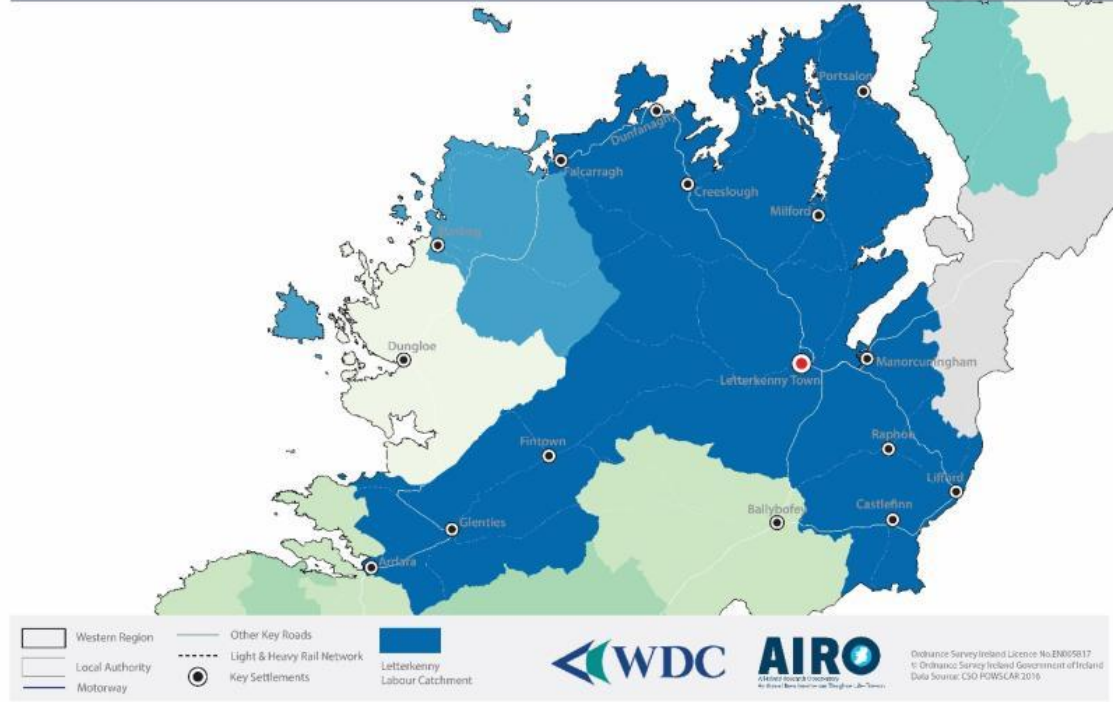


## Labour Catchments (2016)

- Letterkenny LC – dark blue
- Derry LC – light grey
- In Inishowen peninsula  
Buncrana (sage green) &  
Carndonagh (cream)

### Letterkenny Town Labour Catchment, 2016

By Electoral Division (ED)



# Commuting from Donegal POWSCAR 2016

- Cross border commuting into NI; from Carndonagh 216, from Ballybofey 96, from Buncrana 303
- Derry catchment (within Co. Donegal) amounts to 5,056 resident workers in 2016 (up from 4,581 in 2006)
- In Derry catchment within Co. Donegal; 1,653 (2016) travelled to work in NI, up from 1,585 (2006)

## Key Findings – Commuting from Donegal

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- Cross border commuting into NI; from Carndonagh 216, from Ballybofey 96, from Bunrana 303
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- In Derry catchment within Co. Donegal; 1,653 (2016) travelled to work in NI, up from 1,585 (2006)
- Commuting to Dublin: from Ballyshannon 18, from Killybegs 23, from Ballybofey 23, from Bunbeg 27, from Donegal 45



## Key Findings - Commuting

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- Cross border commuting into NI; from Carndonagh 216, from Ballybofey 96, from Buncrana 303
- Derry catchment (within Co. Donegal) amounts to 5,056 resident workers in 2016 (up from 4,581 in 2006)
- In 2016, 1,653 of these travelled to work in NI, up from 1,585 in 2006
- Commuting to Dublin: from Ballyshannon 18, from Killybegs 23, from Ballybofey 23, from Bunbeg 27, from Donegal 45