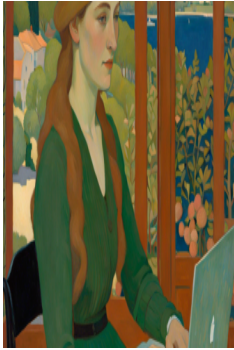


1. Projects



The impact of the teleworking revolution on the growth of megacities (Paris, London, New York)

Finished research
Begin: June 2023
End: April 2024

Megacities are huge urban areas with over ten million inhabitants, concentrating economic, social and cultural activities. But such density comes at a price: their sheer size and the concentration of employment mean long commuting times, soaring living costs and cramped living spaces. The pandemic of 2020 sparked a widespread adoption of telework in these cities, allowing residents to experiment with new ways of organising their activities. Four years on, what are the outcomes of this phenomenon? What impact has it had on how these areas are organised and on people's lifestyles? Will telework prove to be a catalyst for a shift from big-city living towards other ways of life? For the third year running, the Mobile Lives Forum has launched a survey to analyse these trends.

Research participants

- BVA Xsight

Following two studies focusing on the Paris Region, this new survey, involving almost fifteen thousand people, broadens the scope of the enquiry to include the megacities of London and New York. The question now is whether the situation in Paris is being replicated elsewhere in the world.

Method

This survey was carried out online in December 2023 in three territories: the Paris Region of Île-de-France and the metropolitan areas of London and New York. A total sample of 14,895 employees was taken, one third in each megacity¹. This included 1,004 teleworkers in the Paris Region, 1,052 in New York and 1,000 in London. "Teleworkers" are defined here as workers - excluding the self-employed – who are employed by companies located in each of the target areas (Île-de-France, New York metropolitan area and London metropolitan area) and who, at the time of the survey, were teleworking at least once a month. "Regular teleworkers" are defined as those who telework at least once a week.

Note: in the text, the residents of Île-de-France, London and New York are defined here as having their offices in the metropolitan areas of Île-de-France, London or New York respectively (whether or not they live there).

The main results

Daily mobility

2

Four years on from the start of the pandemic, almost half of all employees telework at least once a month in the three megacities (47% in the Paris Region and London, 54% in New York). And when people telework, they tend to do so regularly: nine out of ten teleworkers do so at least once a week.

The pandemic has revolutionised practices, with three quarters of the teleworkers in each region never having worked remotely before 2020 (79% in Île-de-France, 76% in New York and 74% in London).

On average, teleworkers in the Paris Region telework two days a week, compared with three days in London and New York. In other words, it has become normal for everyone to spend more days at home than at the office each week.

Residential mobility

3

One in five employees in the Paris Region, whether they telework or not, plans to leave the region within the next five years. This represents around 800,000 workers.

Although teleworking does not in itself reduce or increase the distance between home and work, it does allow people to widen their search area for jobs and housing: of those living in the Paris Region who are planning to move, 40% would not have the same plans, or would not plan to move at all, if the option to telework was not there.

Past and future relocations are mainly motivated by the desire for a bigger home, more outdoor space and a quieter environment. The opposite of what is available in the heart of a megacity.

In the three megacities, it has become normal for people to spend one or more nights away from home on days when they need to travel to their workplace: this happens regularly for 26% of teleworkers in Paris, 47% in London and as many as 62% in New York.

Results

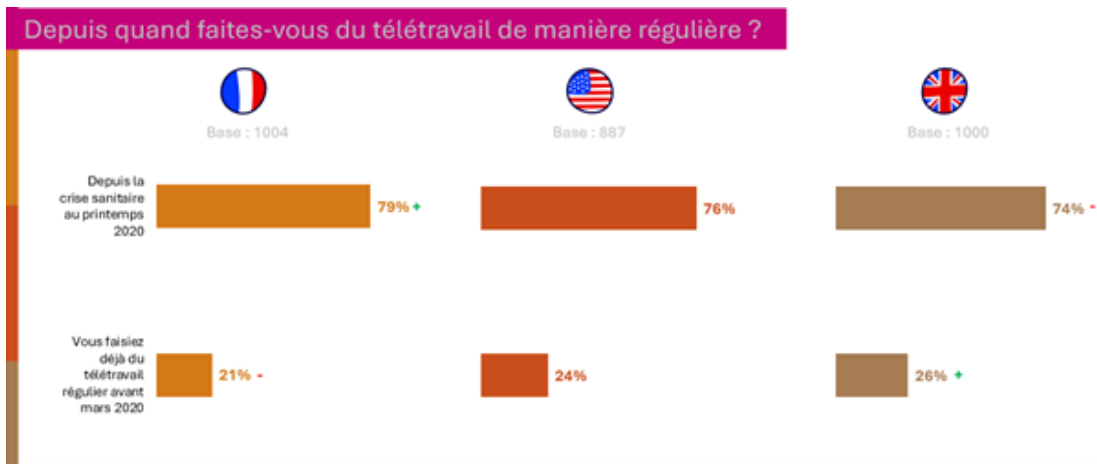
1) Paris, London and New York, three megacities at the heart of the teleworking revolution

> Telework, a practice boosted by the Covid 19 pandemic

In all three megacities, teleworking is widely practised: 47% of employees in Paris and London telework at least once a month, and as many as 54% do so in the New York metropolitan area.

In these three areas, more than nine out of ten people who telework do so regularly, i.e. at least once a week. This means that 45% of employees now telework at least once a week in the metropolitan areas of Paris and London. The figure reaches 50% in New York's metropolitan area.

The pandemic has revolutionised working practices; indeed, prior to 2020, three quarters of the teleworkers across the three megacities had never worked remotely before (79% in Île-de-France, 76% in New York and 74% in London).



Translations: When did you start to telework regularly?/Since the pandemic in the spring of 2020/You were already teleworking regularly before March 2020

> Frequency and location of telework: less prevalent and more regulated in the Île-de-France region

Four years since the start of the pandemic, it has now become normal to spend more days at home than at the office each week. In fact, in the Paris Region, teleworkers work remotely for an average of two days a week, while in London and New York, the average is three days.

Teleworkers in the Paris Region work mainly from home (89%). This figure is higher than in London (75%) and New York (67%), where it is much more common to work from a second home, or a coworking space or a café: nearly one in two New Yorkers do this regularly or occasionally and nearly one in three do so in London, compared to only one in ten in Paris (two in ten telework from a second home).

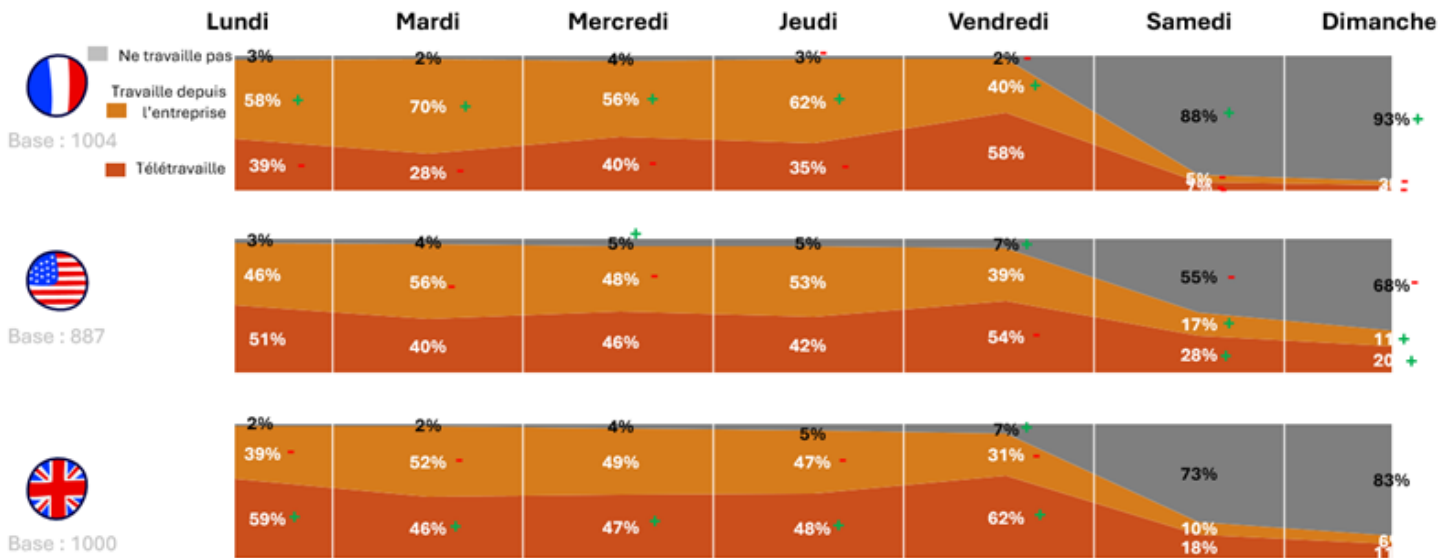
Half-day teleworking is much more widespread in New York (41% of teleworkers) and London (28% of teleworkers) than in the Paris Region, where only 9% of employees telework for half a day from time to time.

> Most common days for teleworking

In all three cities, Fridays are the most common days for teleworking (58% in Paris, 54% in New York and 62% in London), just behind Mondays (39% in Paris, 51% in New York and 59% in London).

Île-de-France stands out with a very high percentage of people present at the workplace on Tuesdays and, to a lesser extent, on Thursdays (70% and 62% in the workplace). These are the days with the highest peaks for public transport and road use. The days closest to the weekend are the most popular for telework, allowing people to travel or extend their break from the workplace. The specificity of Wednesdays in France can be explained by the French school system (children are often not in school on Wednesdays).

Jours de télétravail par mégapoles

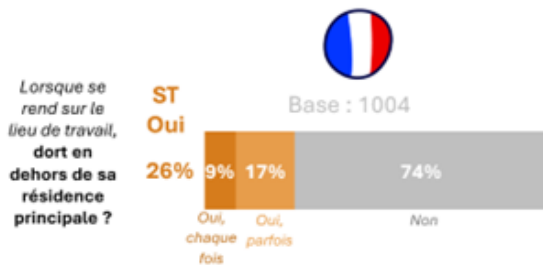


Translations: Days of telework per megacity/Monday/Tuesday/Wednesday/Thursday/Friday/Saturday/Sunday/Not working/Working on-site/Teleworking

> Les découchés, vers une nouvelle « bi-résidentialité » ?

4

For 26% of teleworkers in the Paris Region, it has become normal to spend one or more nights away from home on days when they go to the workplace. This trend is becoming increasingly widespread, since only 18% of teleworkers did so in 2022.



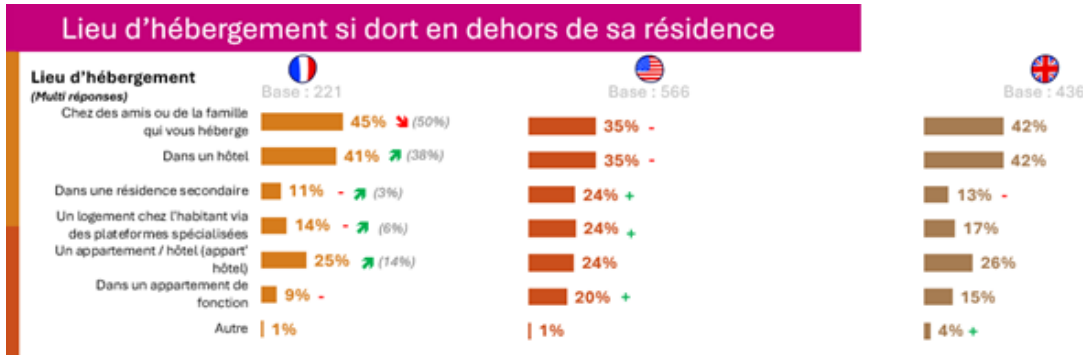
Translations: When travelling to the workplace, do you sleep away from home/Yes, every time/Yes sometimes/No

The number of nights spent away from home is even higher in London and New York, where respectively 47% and 62% of teleworkers regularly sleep away from home when they travel to their workplace.

Half (49%) of the teleworkers in the Paris Region only spend one night away. In the United States and England, it is more common to stay away for two nights or more: 74% and 61% respectively.

When they are away from home, 45% of people in the Paris Region stay with friends or family. This is 5 points less than in 2022. Commercial alternatives are increasingly used: hotels represented 41% in 2023 (+3 points since 2022), hotel-apartments 25% (+11 points), and home-stay accommodation via specialised platforms was 14% (+8 points).

This trend may reflect that what used to be considered an exceptional or temporary occurrence has become something more permanent. As a result, informal nights away may have become less practical (wariness of disturbing family and friends, wanting more comfort, etc.).



Type of accommodation when sleeping away from home/Type of accommodation/Hosted by friends or family/In a hotel/In a second home/Home-stay via specialised platforms/Hotel-apartment/A company flat/Other

While in the UK the figures are similar, in the US the use of second homes is much higher: 24% in the US compared with 11% in France and 13% in the UK.

2) The impact of telework on where people live and work

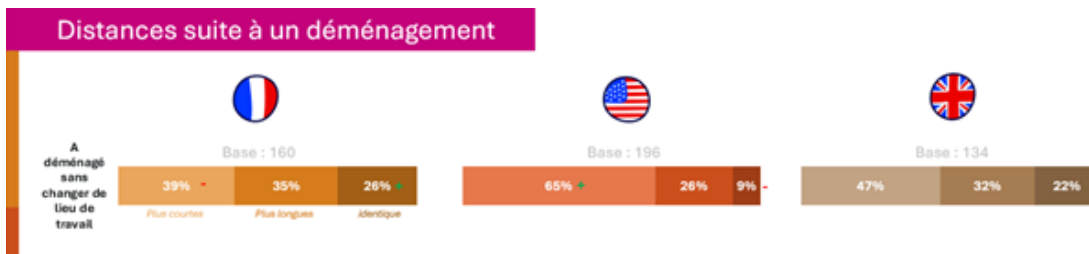
> More teleworkers have moved house than other workers since 2020

Since the pandemic, teleworkers have moved house more than non-teleworkers: 35% compared with 24% in Île-de-France, 33% compared with 24% in London and 34% compared with 26% in New York.

However, there has been a general slowdown in relocation in 2023, mainly due to the economic crisis and inflation. As in previous waves however, the trend is still to move away from the centre of the Paris Region. Since 2020, 14% of teleworkers who have moved house have moved away from the centre of the region, compared with 5% who have moved closer. 62% moved within the same living area.

> Telework does not in itself increase in the distance between home and work, but it does allow workers to widen the search area for jobs and housing.

Telework does not necessarily result in an increase in the distance between home and work when moving. Among teleworkers in the Paris Region who moved house, 35% moved further from their office (35%) but 39% moved closer. By contrast, 47% of teleworkers in London moved closer, compared with 22% who moved further away. The figure is even higher in New York, where 65% of teleworkers moved closer to their workplace and only 9% moved further away.



Translations: Distances following a move/Moved without changing workplace/Shorter/Longer/Identical

When we look at the future plans of people living in the Paris Region, we see the same dynamic: there are just as many people planning to move further away from their workplace (29%) as there are planning to move closer to it (28%).

However, it is clear that telework enables people to broaden their search area for a new home, and even more so for a new job. 25% of teleworkers who have moved since the pandemic of 2020 would not have planned the same move without telework, and 7% would not have moved at all. Among those who have moved further away from their workplace, the figure rises from 25% to 29%.

In terms of teleworkers who plan to move in the future, 39% claim they would have different plans, or no plan to move at all, if not for the possibility of teleworking. This figure rises to 52% for plans that involve moving further away from the workplace. Among the teleworkers in the Paris Region who changed the location of their workplace without moving house, 47% increased the distance between the two, while only 24% decreased it. Among the former, if telework had not been a possibility, 22% would have chosen a workplace closer to home and 46% would not have changed their workplace.

In the future, the ability to telework could encourage one in two teleworkers in the Paris Region to choose a job or move house without longer distances being seen as a barrier. Abroad, the option of telework is an even greater incentive to change jobs for something further from home (around three in four).

> A persistent desire to leave the Paris Region

For the third year running, the number of teleworkers planning to move remains high: 46% of teleworkers in the Paris Region are planning to move within the next five years, compared to 39% in 2022. This increase is certainly due in part to a number of projects being postponed in 2023 because of inflation.

Although only 4% of teleworkers in Île-de-France moved away from the region in 2020, with even a slight trend of people returning (5% of teleworkers moved away from the region between 2020 and 2023 and returned), there are still many who plan to leave the region.

One in five workers in the Paris Region, whether they telework or not, plan to leave the region within the next five years. This represents around 800,000 workers.

The most attractive regions are the west of France (Normandy and Brittany) and the entire southern half (New Aquitaine, Occitania, Auvergne-Rhône-Alpes, PACA).

> More space and quiet, the main reasons for past and future moves

People who were already living in a house (as opposed to an apartment) in 2020 are significantly less likely to have moved between 2020 and 2023. Unsurprisingly, we can see that past and future moves are mainly motivated by the search for a larger home, outdoor space and a quieter living environment. Exactly the opposite of what is readily available in megacities. A more pleasant climate is also very much in demand, which may explain the appeal of the South of France in particular.

3) The main differences between the three megacities

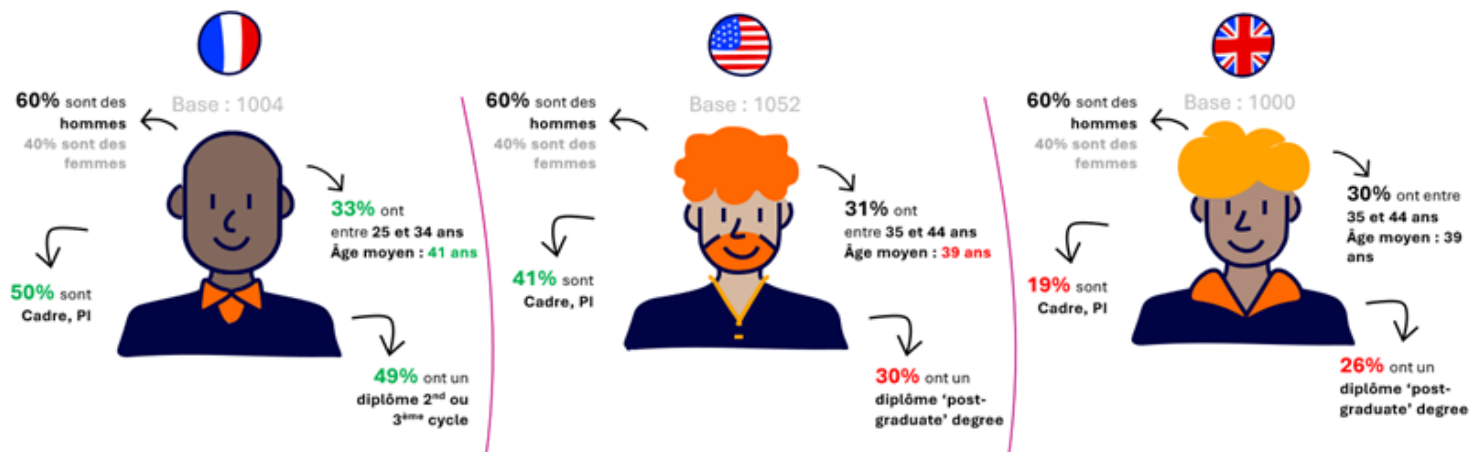
What is the typical profile of a teleworker in each of the three megacities? 60% of teleworkers in these three urban centres are men, with an average age of 40. In the Paris Region, half hold managerial or executive level positions, which is the case for 41% in New York but only 19% in London. This difference can also be seen in the level of qualifications: 50% in the Paris Region have a post-graduate degree, compared with 30% in New York and 26% in London.

- 27% of Paris Region workers spend more than half of their working hours teleworking. This rises to 49% in New York and 53% in London.
- Only 15% of teleworkers in the Paris Region telework full-time, whereas this is more common in New York (one in two) and in London (one in three).
- Half-day teleworking is much more widespread in New York (41% of teleworkers) and London (29% of teleworkers) than in the Paris Region, where only 9% of the residents telework half a day.
- While the vast majority of teleworkers in the Paris Region often telework from home (89%), this is less common in London (75%) and New York (67%). In those cities it is much more common to work from a

second home, a coworking space or a café: almost half of New Yorkers do so regularly or occasionally and almost one third do so in London, compared with one in ten in Paris (two in ten from a second home).

- While the practice of teleworking is growing in all three megacities, it is more widespread among teleworkers in New York (62%) and London (47%) than in the Paris Region (26%). Moreover, in France, half (49%) of all teleworkers who spend time away from home do so for just one night. In the United States and England, it is more common to stay away for two nights or more: 74% and 61% respectively.
- Among teleworkers in the Paris Region who have moved house, almost as many have moved further away from their workplace (35%) as have moved closer to it (39%), while in London, 47% of them have moved closer and 22% have moved further away. The figure is even higher for New York teleworkers, where 65% of them have moved closer to their workplace, and only 9% have moved further away.

Le profil type des télétravailleurs



Translations: Typical profile of teleworkers/60% are men/40% are women/33% are aged between 25 and 34 years/Average age: 41 years/50% are manager or executive level/49% have a post-graduate degree/60% are men/40% are women/31% are aged between 25 and 44 years/Average age: 39 years/41% are manager or executive level/30% have a post-graduate degree/60% are men/40% are women/30% are aged between 35 and 44 years/Average age: 39 years/19% are manager or executive level/26% have a post-graduate degree

Download

* Download the synthesis

Find out more about the two previous rounds of surveys, carried out in 2021 and 2022, on how telework has impacted relocations in the Paris Region:

Can telework enable you to leave the Paris Region? First part

Telework survey: towards an exodus from the Paris Region? Second part

Notes

1 5004 employees, including 4000 non-teleworkers, with offices in the Île-de-France region. 4886 employees, including 3834 non-teleworkers, with offices in the New York metropolitan area. 5005 employees, including 4000 non-teleworkers, with offices in the London metropolitan area.

2 Daily mobility refers to all the journeys made every day, or almost every day, to carry out one's usual activities: work, shopping, health appointments, escorting others, sport, leisure, walking, etc.

3 Residential mobility refers to the change in a household's main place of residence.

4 Bi-residentiality means living in two homes for almost an equal length of time.

Teleworking

The remote performance of a salaried activity outside of the company's premises, at home or in a third place during normal working hours and requiring access to telecommunication tools.

En savoir plus x

Mobility

For the Mobile Lives Forum, mobility is understood as the process of how individuals travel across distances in order to deploy through time and space the activities that make up their lifestyles. These travel practices are embedded in socio-technical systems, produced by transport and communication industries and techniques, and by normative discourses on these practices, with considerable social, environmental and spatial impacts.

En savoir plus x

Residential mobility

Broadly speaking, residential mobility refers to a household's change of residence within a life basin.

En savoir plus x

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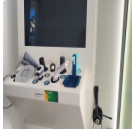
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1 <https://forumviesmobiles.org/en/project/15450/does-teleworking-allow-people-leave-ile-de-france>

2 <https://forumviesmobiles.org/en/project/15756/telework-survey-towards-mass-exodus-residents-ile-de-france>

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