



The Future

of Work

Implications for local
economic development
and planning in the UK

About Smart Growth Analytics

Smart Growth Analytics is a professional economic research consultancy, specialising in the provision of intelligence to inform evidence-based planning and decision-making, at the local area level. The company was formed by Jim Plunkett-Cole in 2011, during some of the toughest economic conditions ever experienced in the developed world. This hugely challenging economic operating environment, where resources to support growth and development are increasingly scarce, sets the context for the ambitions of Smart Growth.

Over ten years ago, Jim was one of the first in the UK to spot national trends in the professionalisation of occupations and, pre-pandemic, the burgeoning growth of homeworking and coworking, producing datasets and analytical techniques to define these at a granular local level.

Smart Growth continuously innovates its knowledge-base to ensure it provides the most contemporary and relevant information and intelligence on all issues surrounding local area business and enterprise, entrepreneurship and economic growth.

SGA
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Executive Planning
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The Future of Work in the UK



Maximising social and environmental wellbeing and economic growth



Environmental

A viable natural environment and availability of natural resources

Social

A nurturing community with equal opportunity

Economic

A high growth and higher-added-value economy

Foreword



Greg Mitchell
Executive Planning Director, Summix

In the world of planning and development, a huge amount of work and energy goes into determining the best places to build new homes, amenities and ultimately communities. Making sure we protect the environment, have decent public transport links and provide sufficient education and health facilities are just a few of the considerations factored into this equation. At the same time, planning for new homes in response to evolving patterns of employment, whether supporting existing jobs or accommodating new ones, is another key ingredient which needs to be given significant thought.

We know that working patterns for many people have changed since the outbreak of the global pandemic, but until now it has been unclear as to the true extent of these changes, many of which were starting to occur well before we knew about COVID-19. While it is crucial to understand the *type* of work people are engaged in, it has also become increasingly important for us to consider *how*, *when* and *where* they work. Answering these questions is fundamental to making sure we can plan for new development in the most effective way possible, building the right homes in the right places, but also providing the necessary connectivity and amenities to fulfil people’s needs and encourage greater sustainability.

Recognising the highly dynamic nature of work and employment, particularly in light of the pandemic, we commissioned Smart Growth Analytics to undertake a unique and unprecedented major body of research to explore and understand the ‘Future of Work’ in the UK.

The core objective of the research was to better understand how those working in the industry, whether in the public or private sectors, can take an entirely evidence-based approach to inform and shape the design of future development. This will improve our ability to respond to people’s needs, but also crucially maximising their potential. Adopting this approach to planning and development (at scale) has the potential to be a catalyst for the UK economy, while at the same time leading to greater levels of sustainability.

We hope businesses, policymakers, the development industry and the wider public find this report useful in re-thinking how we shape and design new development, making sure we can realise the huge environmental, social and economic opportunities on offer from the changes in working patterns we have witnessed over the past few years.

Introduction and methodology

The research and analysis undertaken took place in the first two quarters of 2022. It comprised an initial series of three inter-related 'Deep Dive' reports, which then culminated in a fourth and final report bringing together all the findings of the previous research. The four Deep Dive reports were as follows:

- 1. The Creative & Knowledge-Based Industries in the UK** - a detailed analysis and exploration of employment and output trends across the UK in the higher-growth and higher-added-value 'Creative & Knowledge-Based Industries', looking at their growth, geographic spread and contribution to the UK economy.
- 2. The Professionalisation of the UK** - a detailed analysis and exploration of employment and employment trends in the UK's professional industries and occupations, with a particular focus on the ongoing 'professionalisation' of work across the UK, including an analysis of 'home office professionals' (HOPs).
- 3. Coworking and Home Office Professionals in the UK** - a detailed analysis of the rise of HOPs and the inter-related rise of formal and informal coworking.
- 4. The Future of Work in the UK** - a final report bringing together previous findings, but also including employment and homeworking projections, to establish a 'rich picture' of the Future of Work in the UK and the implications for future large-scale residential development.

The methodology underpinning the report was secondary research and analysis of secondary sources of data and information, primarily drawn from the Office for National Statistics (ONS). These included: the Census of Population (CoP), the Business Register & Employment Survey (BRES), the Labour Force Survey (LFS) and associated Annual Population Survey (APS), UK Business Counts (UKBC), the Annual Survey of Hours and Earnings (ASHE), Workforce Jobs (Wfj) and Population Estimates/Projections (PEP).

Where data was out of date, such as the Census of Population 2011, simple estimating techniques were employed to provide more recent estimates. All industrial and occupation employment projections were created by projecting recent trends forwards at one half of the historical growth rates in order to account for reduced international immigration as a result of the UK leaving the European Union.¹

This short report sets out the main findings and implications of this critical body of new research.

1. The adoption of a 50% growth assumption presents the scenario of 'least error' in that it lies exactly midway between the highest growth / high immigration scenario and the lowest growth / lowest immigration scenario.

The 'key drivers' of the Future of Work in the UK

The key drivers of the Future of Work in the UK are a combination of pre-pandemic trends in business and employment (trends prior to 2020), on the one hand, and the post-COVID legacy of the 2020 to 2021 pandemic from early 2022 onwards, on the other.

The rapid growth of the Creative & Knowledge-Based Industries in the UK

The rapid growth of the Creative and Knowledge-Based Industries in the UK², and the higher-added-value nature of these industries, means that they are now THE driver of the UK economy and UK prosperity.

As can be seen from the diagram, the UK's Creative & Knowledge Industries contribute some 7.0 million jobs to the UK's total of almost 30 million jobs (excluding self-employed and those not registered for VAT and / or PAYE). It can also be seen that the UK's Creative & Knowledge Industries contains three sub-components: 1.3 million in 'Creative Industries'; 6.0 million in 'Knowledge-Based Services', and; 0.9 million in 'Knowledge-Based Production'. (It should be noted that these do not sum to 7.0 million overall as there is substantial overlap – of around 90% - between the Creative Industries and Knowledge-Based Services).

Perhaps the most important statistic here is that the Creative & Knowledge-based Industries comprise more than two thirds (68%) of the country's entire 'Tradables Sector'. This is important because the growth and

competitiveness of the UK Tradables Sector, unlike the UK 'Non-Tradables Sector' which is dependent on local markets, is dependent upon demand and growth in far less limited and unrestricted national and international markets. As such, the UK Tradables Sector outperforms the UK Non-Tradables Sector in all aspects of economic performance (such as growth, productivity, income, business and employment tax contributions). In turn, this means that the UK Tradables Sector drives growth of the UK economy as well as providing the economic surplus which enables us to fund public services and infrastructure and support our ageing and dependent populations.

The UK Tradables Sector drives the UK economy, and the UK's Tradables Sector itself is driven by the UK's Creative and Knowledge-Based Industries. In short, the UK economy is driven by its Creative and Knowledge-Based Industries.

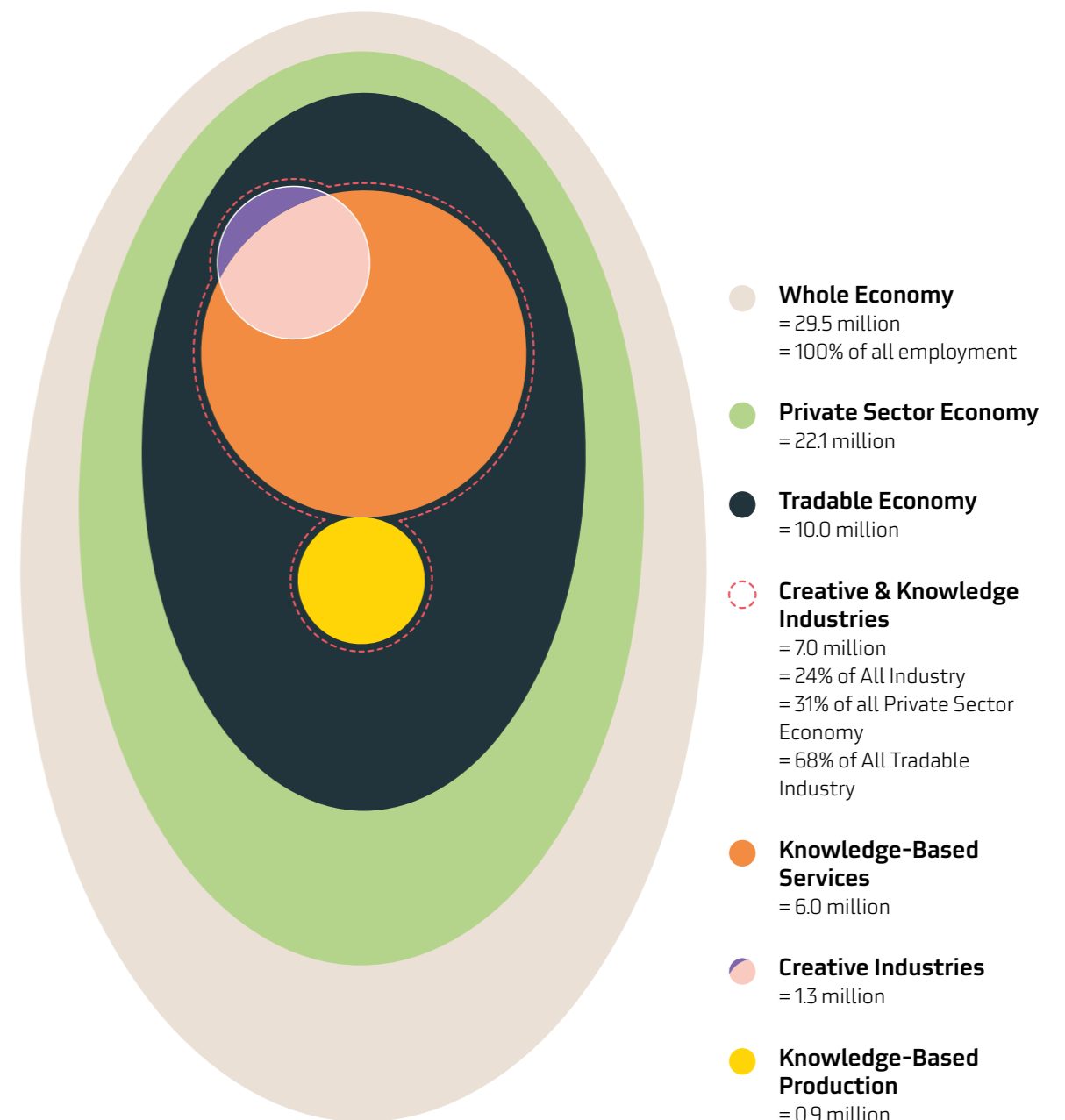
² Computing services, Telecommunications, Media services, R&D, Business services, HE, Oil and gas and electricity, Pharmaceuticals, Rubber / Plastics, Electronics / Electrical, Machinery and equipment (including vehicles etc.), Museums, galleries and libraries, Crafts, Music, performing and visual arts, Transport via pipeline

The UK Tradables Sector

The UK's private sector industries which trade, or have the potential for trade, outside of the borders of the local area where they are produced or provided (including tourism).

Diagram 1:

The Creative and Knowledge Industries in Great Britain



Source: SGA based on data extracted from BRES 2020 (Employees in Employment)

Panel 1, below, gives some further summary statistics with respect to the UK's Creative and Knowledge-Based Industries and associated Tradables Sector and their contribution and competitiveness.

For example, the panel shows that the UK's Tradables Sector:

- Accounts for all UK exports.
- Has productivity of 140% the UK average.
- Generates almost half (48%) of the UK's entire output (GVA) with just over one-third its employment (35%).
- Generates almost two-thirds (65%) of the UK's Corporation Tax contributions (again, with just over one-third its employment).
- Sectors closely aligned to Creative and Knowledge-Based Industries accounted for 86% of the UK's total industrial private sector employment growth from 2004 to 2021.

Panel 1:

Key statistics on the Creative & Knowledge-Based Industries and Tradables Sector in the UK

→
7.0 million

The number of people who work in the Creative and Knowledge-Based Industries in the UK.

→
48%

The proportion of the UK's total GVA output generated by the UK's Tradables sector (and it does this with just 35% of UK total employment).

→
68%

The percentage of the UK's total Tradables sector employment accounted for by the UK's Creative and Knowledge-Based Industries.

→
65%

The proportion of the UK's total Corporation Tax receipts which are generated by the UK's Tradables sector (again, with just 35% of UK total employment).

→
100%

The percentage of UK exports generated by the UK Tradables sector.

→
86%

The proportion of the UK's total industrial private sector employment growth from 2004 to 2021 accounted for by sectors closely aligned to Creative and Knowledge-Based Industries.

→
140%

The productivity per worker of the UK's Tradables sector compared to UK average productivity per worker.





The ongoing professionalisation of the UK workforce

Very much related to the above trends in Creative & Knowledge-Based Industries, the second pre-pandemic key driver of the Future of Work in the UK is the ongoing 'professionalisation' of the UK economy. This is the simple process whereby an increasing proportion of jobs in the UK become professional and / or higher-skilled (and a commensurate lower proportion of UK jobs are not professional in nature and / or they are not higher-skilled in nature). The process of professionalisation is closely related to the growth of the Creative & Knowledge-Based Industries in the UK for the very simple reason that the workforce of these industries is almost entirely dominated by professional workers.

In 2020, professionals accounted for almost 15 million of the UK's 33 million workers (this includes self-employed), representing some 45% of all UK workers. There are 19 million higher-skilled workers in the UK, accounting for 78% of all UK workers. However, 78% of all UK's higher-skilled workers are professional workers. This means that higher-skilled workers are dominated by professionals of one order or another.

Higher-skilled workers in the UK drive the UK economy, and the UK's higher-skilled workers are driven by professionals. In short, the UK economy is driven by its professionals.

The main reason why the UK's higher-skilled workers / professional workers now drive the UK economy is because of the extraordinary growth of professional workers in the UK economy over the last 20 or so years; between 2004 and 2021 the UK generated 5.8 million additional workers in growth occupations (analysis excludes declining occupations), 80% of which were professional workers as opposed to any other occupational grouping. In fact, it seems likely that workers in professional occupations will soon outnumber all those workers in other occupations.

With 70% of the UK's total employment growth from 2022 to 2050 projected to be accounted for by employment growth in professional occupations, it is almost certainly the case that these occupations will increase their role as the key economic driver of UK economic growth and prosperity.

Diagram 2:

Professional Workers in the UK Economy in 2020

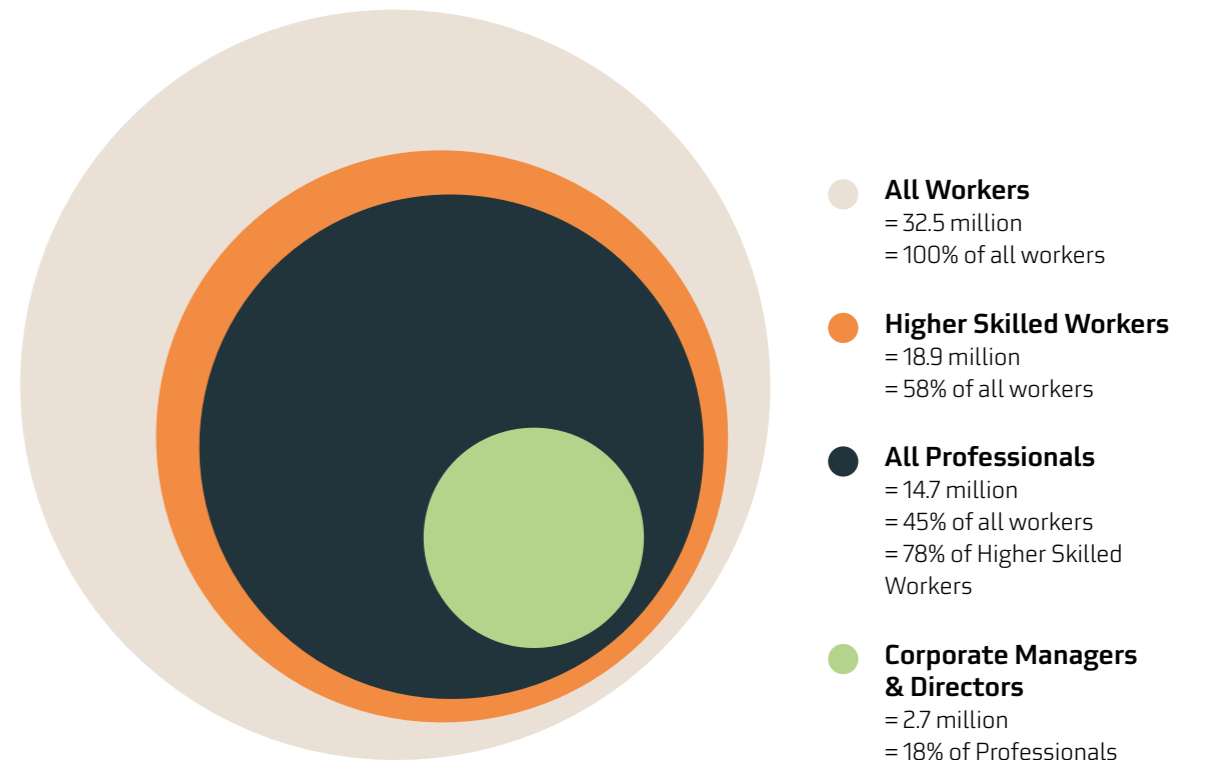
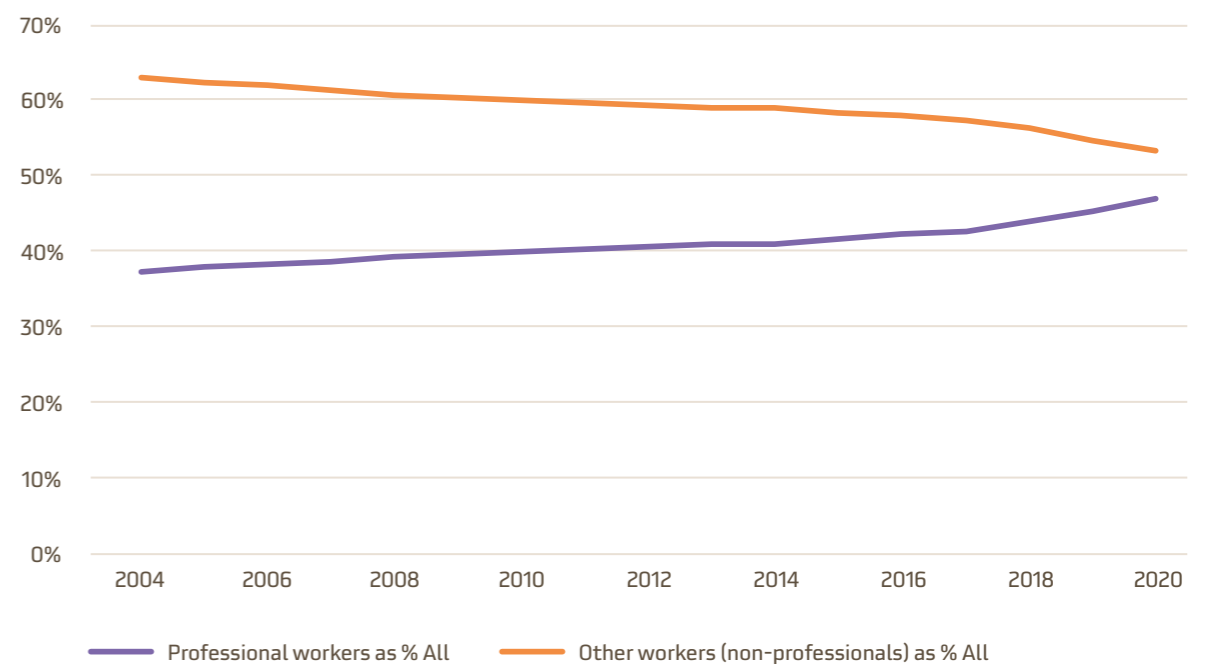


Chart 1:

Trends in Professional Workers as a percentage of All Workers alongside All Other Workers



Source: Annual Population Survey, ONS



The panel below sets out some further interesting statistics regarding the UK's community of professional workers. It shows that UK professional workers:

- Have an average salary level equal to 132% of the national average (which means they earn approximately one-third more than UK workers earn, on average).
- Account for almost three-quarters (73%) of the UK's total annual wages / salary bill.

Panel 2:

Professionals and higher-skilled workers in the UK



14.7 million

The number of professionals in the UK.



78%

The percentage of the UK's higher-skilled workers accounted for by professionals.



80%

The proportion of the UK's additional workers from 2004 to 2021 who are professional workers.



58%

The proportion of all UK workers who are higher-skilled workers.



2025

The year by which professionals are likely to outnumber all other workers in the UK economy.



132%

The salary per worker of the UK's higher-skilled workers compared to UK average salary per worker.



5.8 million

The number of additional workers in growth occupations in the UK economy from 2004 to 2021.



73%

The proportion of the UK's annual employee salary bill accounted for by the UK's higher-skilled workers (and they do this with just 56% of UK total employment).



70%

The proportion of the UK's total employment growth from 2022 to 2050 which are projected to be professionals.



The pandemic and its legacy on homeworking and coworking

The above industrial and occupational trends, covering the last 20 or so years, were obviously all well in evidence prior to the COVID-19 pandemic. As most will recall, outside of key workers, the pandemic forced all those who could work from home to work from home during a series of UK Government 'lockdowns' which commenced in March 2022 and ended with the Prime Minister's 'call back to work' at the end of January of this year (2022).

Chart 2, on the right, shows trends in the rate of homeworkers (those working predominantly at home - i.e., 3 days a week or more) as a % of all workers over the last 24 years, starting from the first quarter of 1998 up to the first quarter of 2022. The 2022 quarter's data contains 1 month of restrictions, but two months of full freedoms (in terms of where to work). This means that it is a relatively good indicator of the extent of the 'return to work' in the UK.

Please note that the 2020 data is from a different source and covers various months through the year, as opposed to quarters. Furthermore, it was not possible to find

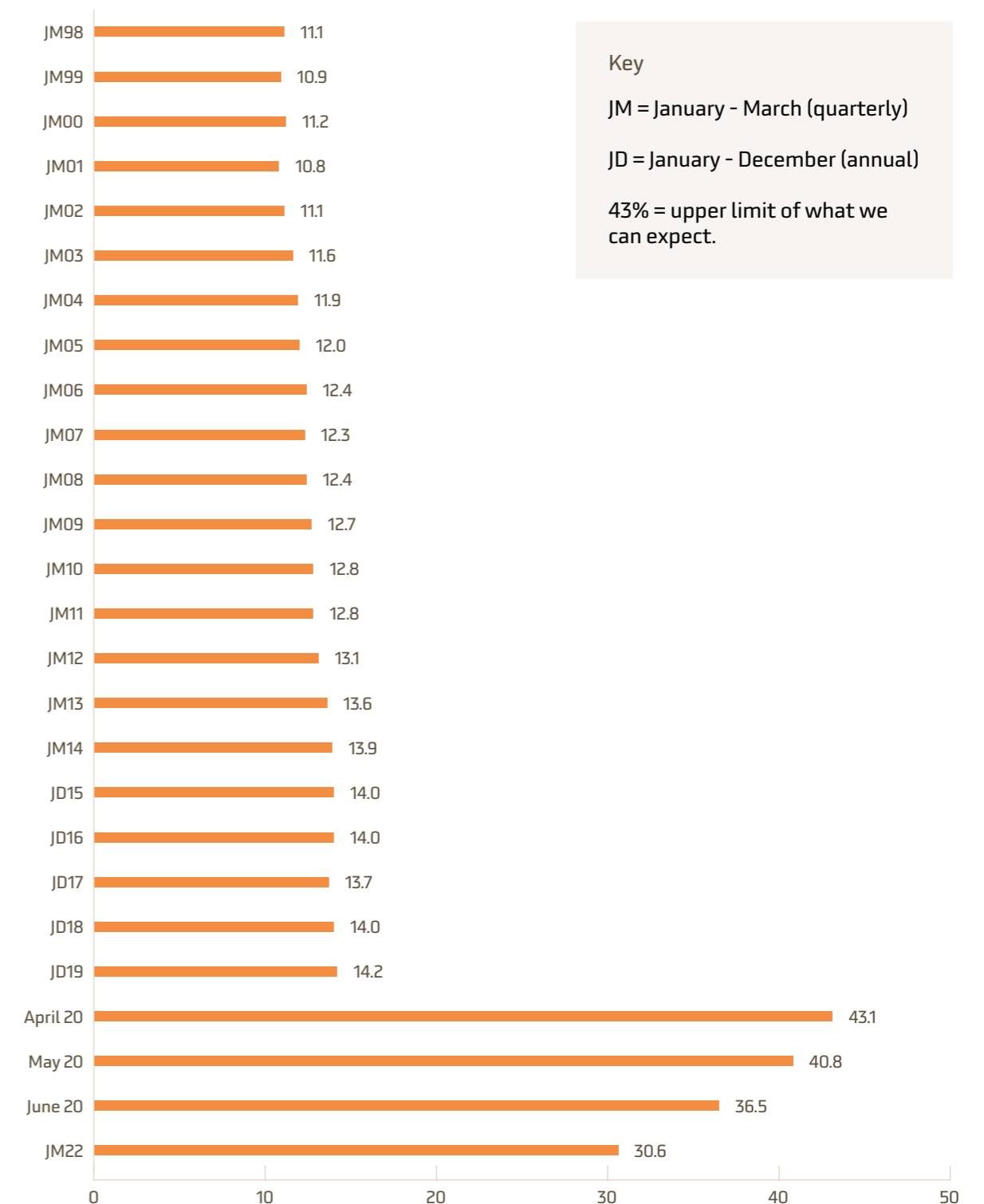
consistent data for 2021, so data for this year is missing at present. Please also note that some data for individual years covers the first quarter of that year only (1998 to 2014) and some covers the full year of January to December (2015 to 2019).³

The chart shows that, in 1998, homeworking was just over 1 in 10 (11%) of all workers. This rose very steadily over the next 20 years to reach almost exactly 1 in 7 (14.2%) of all workers in 2019, just prior to the pandemic. The chart then shows how the UK homeworking rate almost quadrupled to 43% in the first full month of lockdown (April 2020) before then sliding downwards to reach 37% two months later in June 2020. The next comparable data we then have, for the first quarter of 2022 (the first largely 'freedoms quarter'), then shows that the homeworking rate had settled to 31% of all workers. This is more than double the homeworking rate found during the pre-pandemic period.

³ The main reason for this data inconsistencies is that, at the time of writing, there was no single data series publicly available which covered homeworking for the periods of interest.

Chart 2:

Homeworkers as % All Workers, January to March 1998 to January to March 2022



Source: Labour Force Survey, ONS 1998 to 2019 and 2022, all 2020 data from Understanding Society Covid-19 Study as presented in the report 'Homeworking in the UK: Before and During the 2020 Lockdown', August 2020, by Alan Felstead, Darja Reuschke

In the post-pandemic period of early 2022, the UK had an additional 5.3 million of its 32 million total workers who were then working **predominantly** at home. This is equivalent to 16% of all UK workers and means that, by 2022, almost 10 million of the UK's 32 million workers are working predominantly from home (equivalent to 31% of all workers).

As well as the above, Panel 3 also gives further insight into the nature of the change in homeworking in the UK as a direct result of the pandemic:

- Almost all of the 5 million additional homeworkers were home-office-based workers and over four fifths of the 5 million were professionals.
- By early 2022, one in six (17%) of all the UK's 32 million workers is now a professional working from home.
- Though not shown in the panel, the fact that most homeworkers are professional, higher-added-value and higher-paid workers, by nature, suggests that the home may well now account for around two fifths of all UK output.

The analysis shows that, single-handedly and almost overnight, the location of work in the UK was fundamentally transformed from its pre-pandemic situation. Further, it suggests that the UK's homes must now be considered as major generators and drivers of UK output and employment... and hence a key driver of the UK economy overall.



Will the UK experience a general 'return to work'?

Of course, all of the above homeworking findings are dependent upon the pandemic-inspired workers not returning predominantly to the traditional workplace (mainly offices) as they were in the pre-pandemic period. We believe that there are a number of closely inter-related reasons why this is not going to happen, and why, certainly in the medium-term to longer-term, we expect homeworking rates to increase above the 31% of the first quarter of 2022:

- The legacy of the pandemic in allowing and enabling people to work from home.
- The increasing financial cost of going to work as opposed to working at home.
- Transport disruption, e.g. from industrial action and climate change, making it more difficult to get to work.
- The desire to reduce carbon by businesses and individuals.
- The general quality of life improvements experienced by homeworkers with more time and money because of working from home.
- The flexibility and inclusivity of homeworking, particularly for women, carers and those with disabilities.
- The ongoing rise in the proportion of all workers, such as professionals and higher-

skilled workers, who are able to work from home (as shown earlier).

- A general rise in formal and informal local coworking opportunities which enables homeworkers to work locally but with the social, collaborative and business networking benefits of working with other similar workers.

This cultural shift, combined with the projections for industries and occupations, suggest that the proportion of UK workers working predominantly at home will rise from its current 31% in the medium-term to longer-term futures.

We would stress that the majority of jobs will never be able to work from home as they require a physical presence where they are produced / delivered. However, with the shares of those industries and occupations demonstrating the highest rates of homeworkers likely to account for the lion's share of UK employment growth over the next 30 years, then it seems likely that homeworking could reach 35% to 40% of all UK workers between 2022 and 2050.

In summary, we believe that such trends ultimately lead to the concept of the 'hidden business park', whereby residential areas essentially become functional business parks due to their high concentrations of professionals working predominantly from home and / or coworking locally.

The impact of the pandemic on UK homeworking

→ **5.3 million**

additional people working from home in the post-pandemic period compared to the pre-pandemic period ('pandemic-inspired homeworkers').

→ **16%**

of the UK's 32 million workers are pandemic-inspired homeworkers.

→ **99% & 83%**

The proportion of the additional pandemic inspired homeworkers who were predominantly office-based AND the proportion of pandemic-inspired homeworkers who are professionals.

→ **9.9 million**

workers now working predominantly at home in the UK.

→ **31%**

of all UK workers are now working predominantly at home.

→ **17%**

The proportion of the UK's 32 million total workers who are now a professionals working predominantly at home.

The Future of Work

When the key drivers outlined above (industries, occupations, homeworking and coworking) are combined, and considered holistically, then we can begin to establish a relatively 'rich picture' as to what the Future of Work in the UK is likely to look like.

Local / Remote

In the home

Formal and informal coworking settings

Community-driven and social

Flexible and inclusive

Professional

Creative

Collaborative

Lower cost

Higher skilled

Higher value added

Higher paid

'Hidden Business Parks'

Increasingly sustainable - economically, socially and environmentally

The implications for local economic development and planning practitioners

The above analysis has attempted to provide insight into the future of work in the UK. It certainly does not cover each and every job in the economy, but it does, arguably, cover quite adequately the 'big picture, big number trends' that we can expect to see in the future. Perhaps the final question for us to cover here in this short briefing report would be to start answering 'What does it all mean?'; particularly for those of us engaged in local economic development and planning. There are a number of key issues we think can help us to start answering the question.

Regional and sub-regional variations in industries, occupations and homeworking

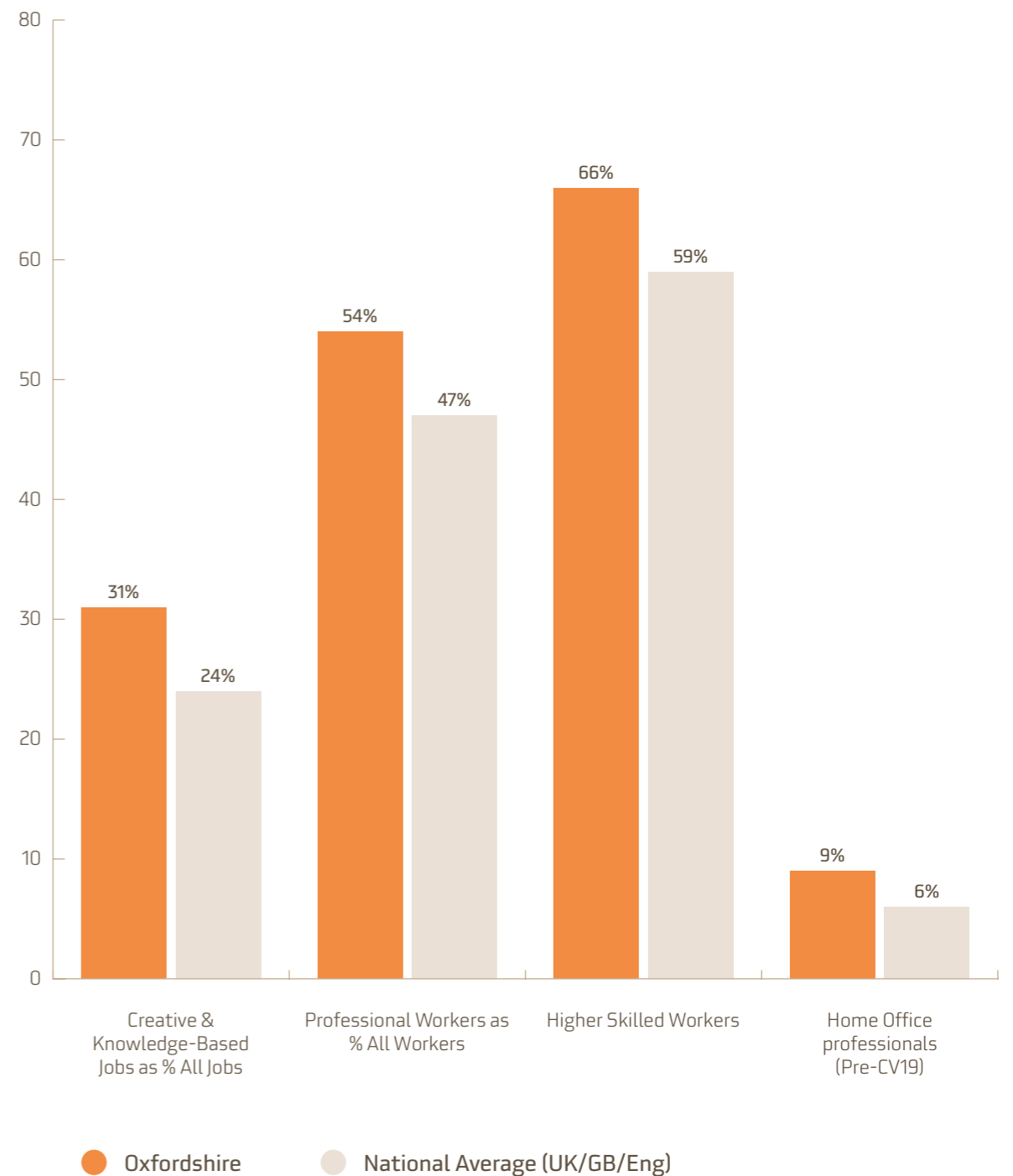
Regional and sub-regional variations in Creative & Knowledge-Based Industry, the associated professional occupations underpinning these industries, and professionals working from home, when combined, mean that some parts of the UK are already pioneering the Future of Work.

Oxfordshire is an excellent example of such an area, and this can be illustrated through its performance of four of the main Future of Work 'metrics'. Oxfordshire outperforms the UK average on every measure, and often by a more than considerable degree. The findings suggest that places such as Oxfordshire are already at the cutting edge of the Future of Work in the UK. Indeed, metrics such as these help to explain Oxfordshire's superior overall economic competitiveness. Within Oxfordshire, South Oxfordshire also stands out strongly on all these metrics, but stands out particularly for having the highest percentage of Creative Industries employment amongst rural areas in the UK and one of the highest rates of professionals working from home amongst rural areas in the UK.

Will places such as Oxfordshire continue their prowess and hegemony into the future? We believe that other parts of the UK will close the gap with Oxfordshire, not least as it is generally easier to make larger increases from a lower base point than a higher base point. Furthermore, since a key aspect of the Future of Work is working from anywhere, this could well lead to a redistribution of professionals and their businesses across the UK. Further issues, such as a rapidly ageing workforce, are also a key threat to places such as Oxfordshire in at least maintaining their position over the next 30 years or so. In fact, it is likely that the main priorities for places such as Oxfordshire are ensuring they attract younger people as a place to live and work whilst at the same time keeping their older residents, particularly professionals, in the workforce (and quite possibly beyond the State Pensionable Age and into their 70s).

Chart 3:

Key Future of Work Metrics, Oxfordshire vs. National Average





Implications for traditional office space

The implications for traditional workspace, and particularly for traditional office space, are that they are highly likely to have seen their 'high point' in the UK in the pre-pandemic period of 2019. We suspect that many businesses have fundamentally restructured their 'location of work practices' in light of COVID-19 and will continue to tweak these going forward to suit their business. With demand for traditional office space in the UK likely to have diminished over the last two years, we feel it is likely that a proportion of such space will be re-purposed for other uses. In places such as Oxfordshire, with a reported lack of laboratory space, there is clearly the opportunity for repurposing offices for such use, particularly on business parks. There is also the opportunity for repurposing some traditional offices for coworking spaces, particularly in urban areas, and some may simply go to housing, social care and / or extra-care facilities. If housing was geared to younger people and older couples and individuals particularly, for example through affordable houses and / or apartments, then this may go some way to solving the ageing workforce issue outlined earlier in this report. An

increase in more suitably-sized and affordable accommodation for older people would also, almost certainly, see a higher proportion of (particularly larger) existing houses currently occupied by older people come to the market.

In terms of local coworking, we believe that the UK may well see the emergence of 'tribrid working patterns'. These patterns are shown in Diagram 2, below. They show how, increasingly, many professionals will divide their time across three main locations:

- The traditional HQ
- The home
- Local coworking centre(s)



- Home Office:** Professionals working from own residence
 - Employees both commuting and remote working at home
- Employment Site:** Individuals commuting to work
 - People who work at an employment site, from home and at flexible/coworking centres
- Coworking Centre:** Individuals or micro-businesses working out of flexible office space/coworking centre
 - HOPs splitting time between home office and coworking centres
 - Employees both commuting and remote working at flexible/coworking centres

Implications for new residential development

The implications for new housing development in local areas are more than considerable, as can be imagined given the change in homeworking patterns as a result of the pandemic outlined above. When planning new residential and infrastructure developments, planners, developers and local authorities should factor in homeworking rates of 30% to 35% up to 2030 and around 35% to 40% from 2030 onwards – compared with the pre-pandemic planning allowance of 14%. And in new developments in areas with very high pre-pandemic homeworking rates, such as Oxfordshire, rates of 35-40% should be considered immediately.

Ensuring that new residential developments are 'homeoffice friendly' will be essential. Further, ensuring that new accommodation types (detached / semi-detached / terraced / apartments etc) are in keeping with homeworker demand, will also be essential. This is particularly the case in areas, such as Oxfordshire, with large numbers of science parks and Creative & knowledge-Based Industry businesses and employment.

In larger, new residential developments we suggest that the provision of formal and informal on-site coworking opportunities, such as dedicated homeworking hubs, will be essential to support its projected concentrations of home office professionals. Such opportunities will lead to some of the highest rates of business innovation and collaboration taking place in any town or large village in the UK.

Coworking opportunities will also be essential to support the social aspects of going to a place of employment, particularly for younger workers who seek social opportunities. Coworking centres are also likely to instigate 'knowledge and business transfer opportunities' from one generation to the next. This is important because it enables business knowledge / acumen / contacts, and possibly even whole business transfer, between generations which, at present, is often lost upon retirement. This is particularly important in places such as Oxfordshire with concentrations of ageing professional workers. Coworking centres may also operate formal business and commerce learning sessions, hosted by training providers (including Higher Education and Further Education).

With the rise of the hidden business park in some areas, it is highly likely that there will increasingly be a 'trade-off' between new traditional workspace development and new residential development. This is obviously a hugely important issue in many parts of the UK, but particularly in those areas where economic growth is constrained by a lack of land for new development. For example, in a new Garden Village development of around 6,000 homes which is purpose-built for homeworking, and with a homeworking rate around 35%, it can be shown that this accommodates around 24,000-30,000 sq m of workspace in its homes (as opposed to traditional workspace).

Transport implications

Quite clearly, increased local working at home (and / or in local coworking centres) means that there has been a fairly dramatic fall in commuting. Data from the 2021 Census, with local data due out shortly, should help to confirm this. However, we highly recommend that local transport patterns, and transport planning, are re-evaluated in light of the trends discussed in this report.

A final conclusion

Creative destruction, a concept in economics identified by economist Joseph Schumpeter, describes the 'process of industrial mutation that continuously revolutionizes the economic structure from within, incessantly destroying the old one, incessantly creating a new one.'

We believe that the COVID-19 pandemic, in hindsight and in foresight, and with its implications for sustainable development outlined in this report, could well be one of the most important examples of 'creative destruction' that the UK has ever experienced.

What can we learn from this? It is clear that an entire new approach, which takes far greater account of pre- and post-pandemic trends in homeworking and local coworking, needs to

be taken with respect to local area planning and development in the UK. Not only do we need to rethink our existing settlements and local approaches to the provision of traditional workspace, but also how we design new garden communities to ensure the benefits on offer from these changes in working patterns can be most effectively harnessed.

While new settlements in particular have the 'strategic capacity' to solve the (many) social, environmental and economic problems the UK faces over the next 30 or so years, how we design and build the homes we live in will also need to account for the systemic changes we're experiencing regarding future working patterns.



