

Global Work-from-Home Experience Survey

Findings from a global research effort to understand the Work-from-Home experience, benefits, and barriers to success

iOMETRICS[®]



Global
Workplace
Analytics

Acknowledgements



The Global Work-from-Home Experience Survey would not have been possible without the unprecedented collaboration of organizations and individuals that saw the value in this critical research. The survey was supported, through distribution to its members, by industry associations around the world.

In particular, we would like to thank the Workplace Evolutionaries (WE) community within the International Facilities Management Association (IFMA) who rallied their members, social media might, and connections with other associations to ensure a broad selection of respondents.



WORKDESIGN
MAGAZINE



Workplace thought leaders

The Global Work-From-Home Experience Survey was developed and analyzed by two of the most respected names in workplace strategy, [Dr. Anita Kamouri](#) and [Kate Lister](#). Both have been involved in work-from-home and strategic workplace research and consulting for more than a decade.



Dr. Anita Kamouri
Vice-President and Co-Founder
[Iometrics, Incorporated](#)

Anita Kamouri, Ph.D. is Vice-president and Co-Founder of Iometrics, a workplace services firm that helps organizations succeed with remote work practices and next-generation workplace strategies. Iometrics has been focused on helping clients create great workplace experiences for over 20 years. With a doctorate in Organizational Psychology, Anita is an expert in workplace survey research and analytics. Her firm has developed some of the largest survey databases in corporate real estate to inform data-based planning, workplace modeling and measuring the human capital impacts of workplace change. Anita provides the expertise to unlock insights about workforce trends and develop workplace solutions that have a positive impact on people, business, and the planet. She has written numerous white papers and articles and presented at many industry conferences on workplace strategy innovation.

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Kate Lister
President,
[Global Workplace Analytics](#)

Kate Lister is an author, speaker and a leading research-based authority on the future of work. In addition to authoring five business-related books, Kate has written scores of articles related to the corporate workplace for major media outlets. The firm's research has been cited by hundreds of publications including the Harvard Business Review, New York Times, Wall Street Journal, Washington Post, and many others. As president of Global Workplace Analytics, Kate helps clients focus on shaping workplace and workforce strategies to improve people, planet, and profit outcomes. GWA partners with the industry's most respected influencers to advance thought leadership on the qualitative and quantitative impacts of workplace change. The firm's work is informed by a proprietary digital library of over 5,000 research reports, case studies, and other content sources related to the technologies, trends, and scientific understandings that are transforming workforce and workplace strategies around the globe.

Kate Lister
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760-703-0377

Global Work-from- Home Experience Survey

During the 2020 Covid-19 pandemic, an unprecedented number of office-based workers transitioned to work-from-home. The purpose of this survey research was to learn from this massive work-from-home “experiment”. This first-of-its kind global survey was designed to gather much-needed data about the impact of Covid-19 on how and where people are working and provide critical insights into the impact this will have on the future of work and the workplace. What worked? What didn’t? What are the priorities for optimizing the work-from-home experience? And, how will the crisis change how and where people work, the need for office space, office design, work practices, and more.



“We find ourselves, unfortunate as the circumstances may be, faced with an unprecedented opportunity to study the work-from-home experience. Our data will give organizations the information they need to both improve the work-at-home experience now and better predict what the crisis will mean to the future of how and where people will work.”

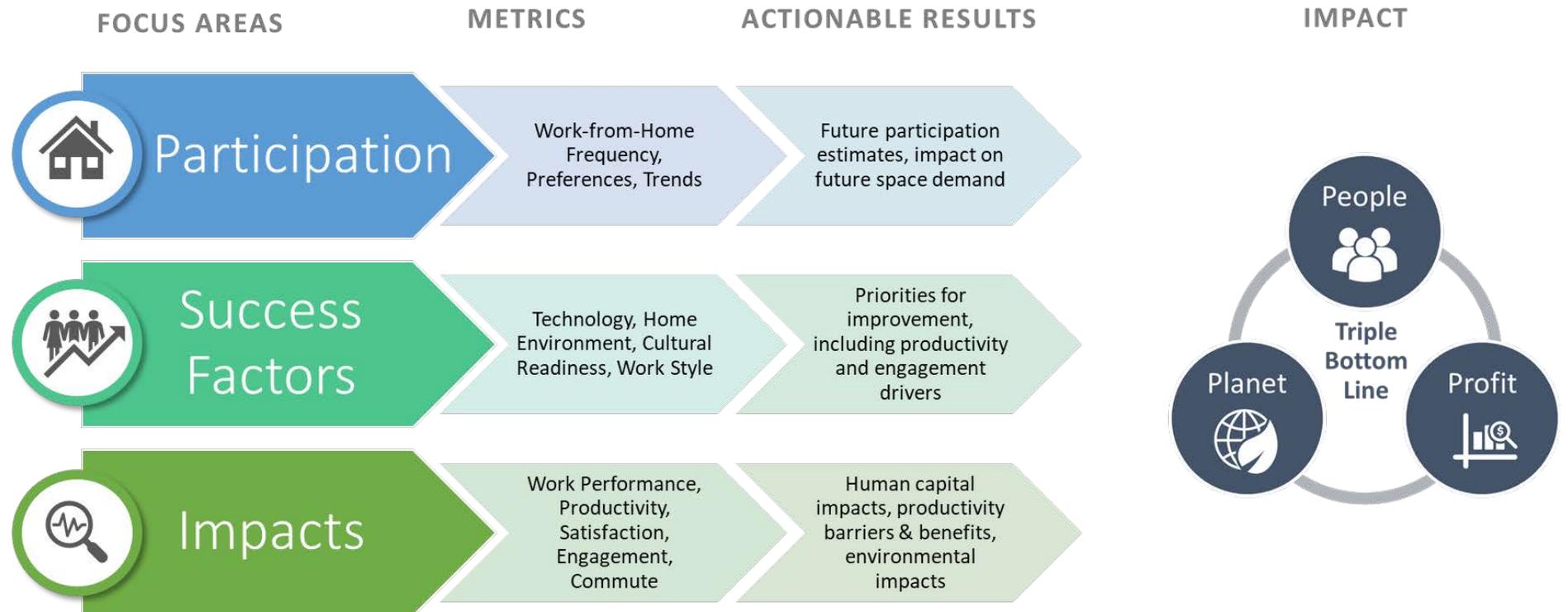
Kate Lister, President, Global Workplace Analytics

“Our research is designed to provide insights into the priority issues to address in the short-term, but also on exploring the changing landscape of remote work in the future, and how that will impact workspace demand in the coming years. We want to help workplace leaders not only survive this crisis, but emerge from it with new insights, intelligence, and approaches for the future.”

Anita Kamouri, Co-Founder of Iometrics

Measurement & Analysis Focus Areas

This multi-faceted assessment is based on industry research and best practices. The holistic framework is designed to support informed workplace decision-making during and after the COVID-19 emergency.



This Report

- Who Responded
- Work-from-Home Participation
- Remote Work Success Factors
- The Manager Perspective
- Work-from-Home Preferences
- Well-Being Benefits
- Commute Avoidance
- Employee Productivity
- Workspace Opportunities
- Triple Bottom Line Impact
 - People-Planet-Profit
- The Future of Work, and the Workplace

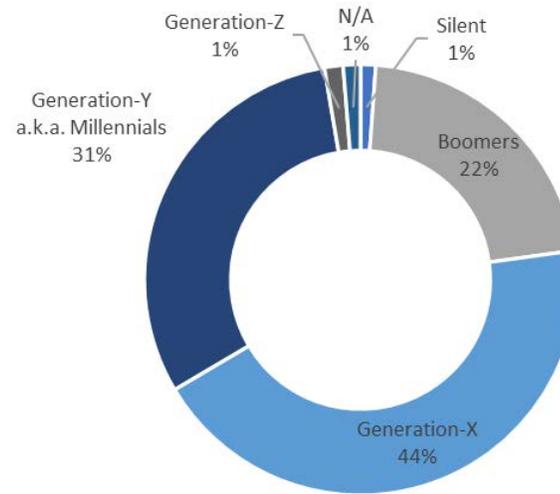


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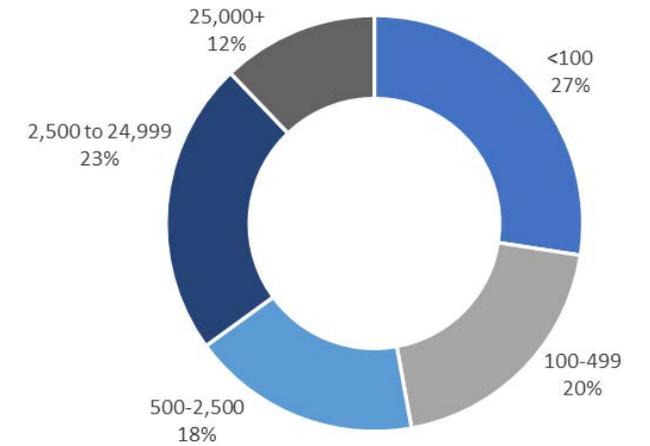
Survey Sample

- **2,865 Responses** over 6-week data gathering period
- Administered through industry associations, social media and networking
- Representative of office-based workers (“white collar”)

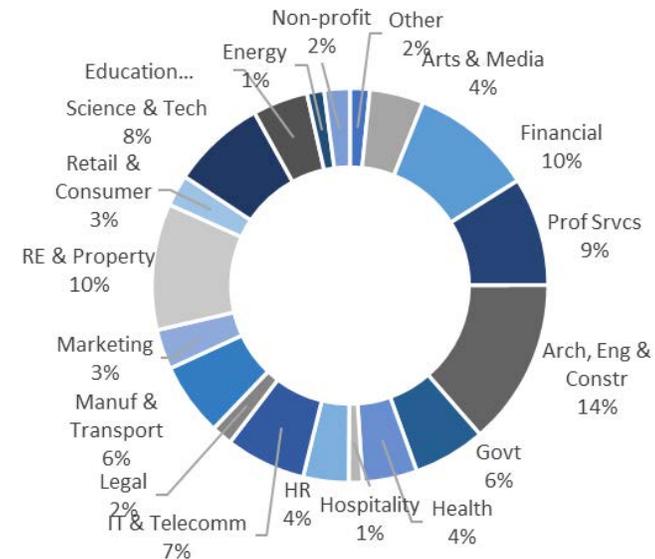
Survey Responses by Age Generation



Survey Responses by Organization Size (Number of Employees)

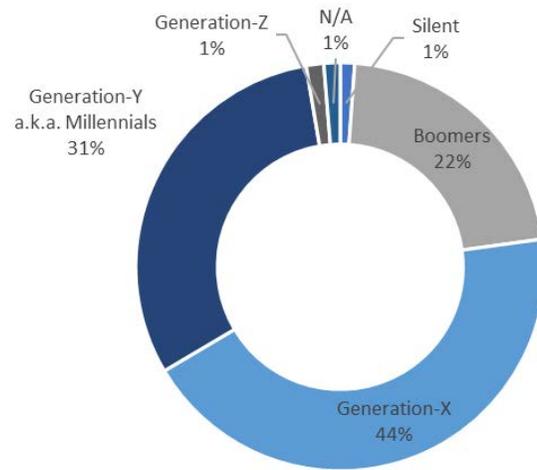


Survey Responses by Industry

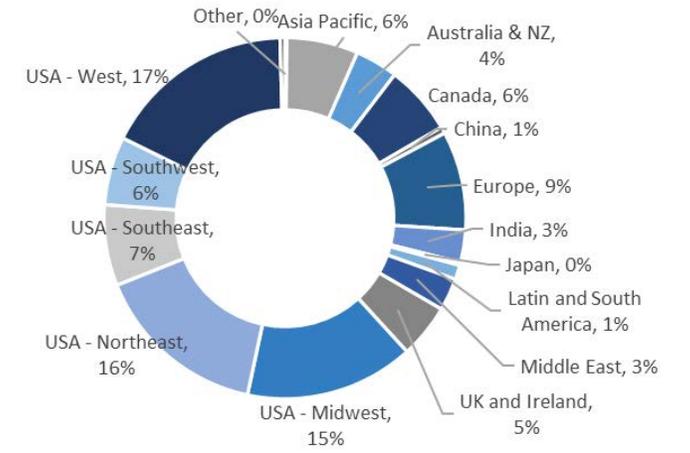


Survey Sample

Survey Responses by Age Generation



Survey Responses by Geography



Survey Responses by Role



Survey Responses by Geographic Region

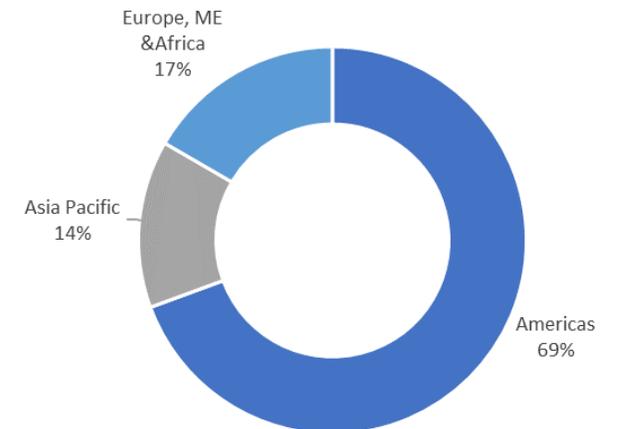




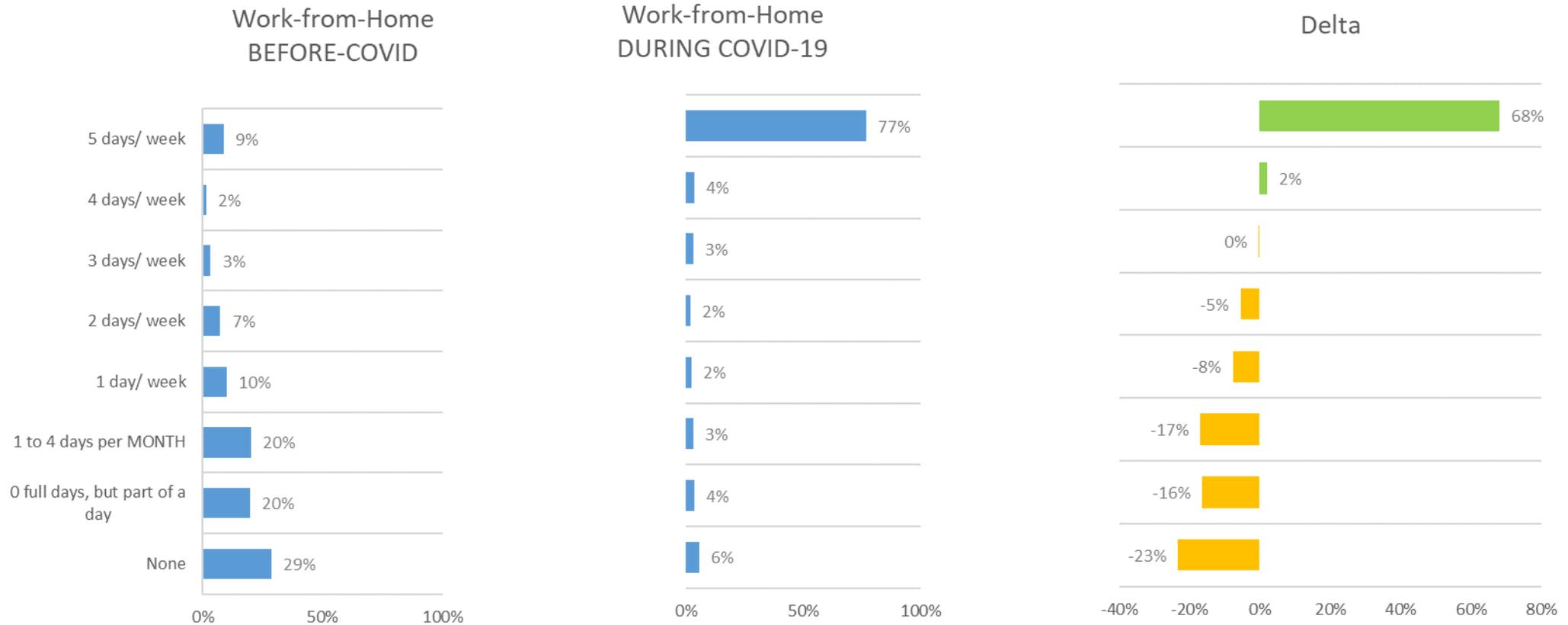
Image by [Mudassar Iqbal](#) from [Pixabay](#)

Work-from-Home Participation

88% working from home on a regular basis during the pandemic

31% were working at home on a regular basis before

Work-from-Home During Pandemic

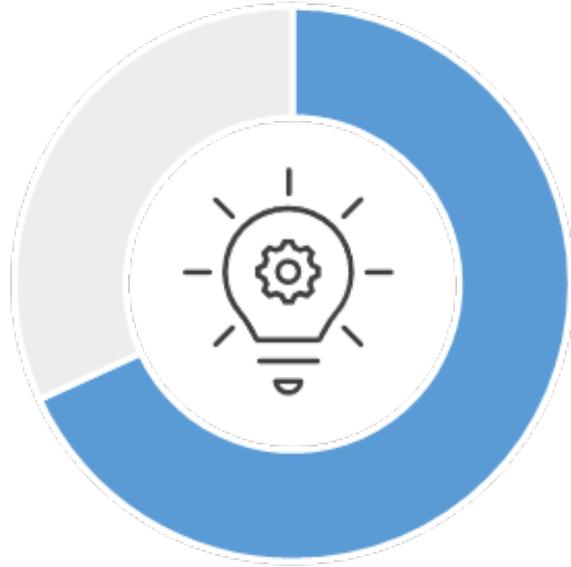


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Remote Work Success Factors



68%

Overall, are very successful working from home

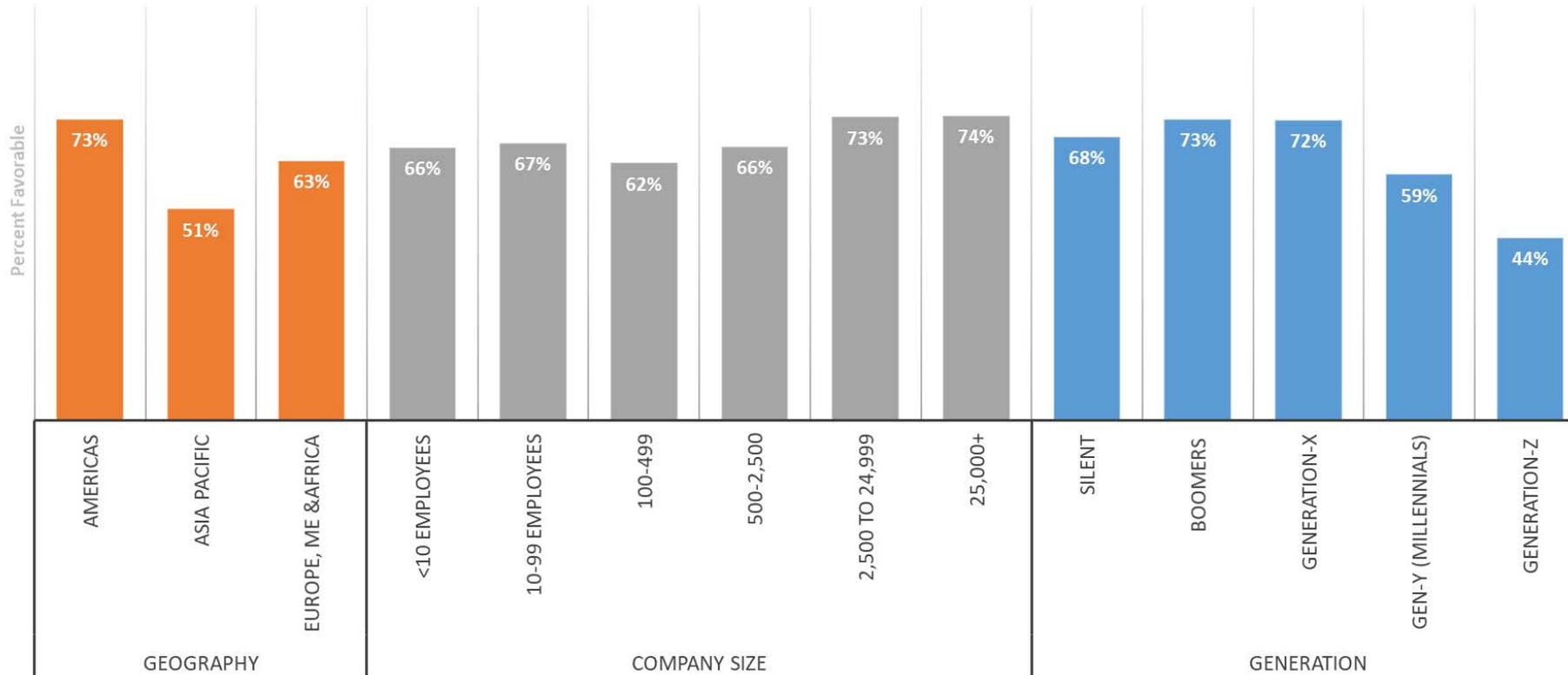
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WFH Success -Group Comparisons

Overall, are very successful working from home

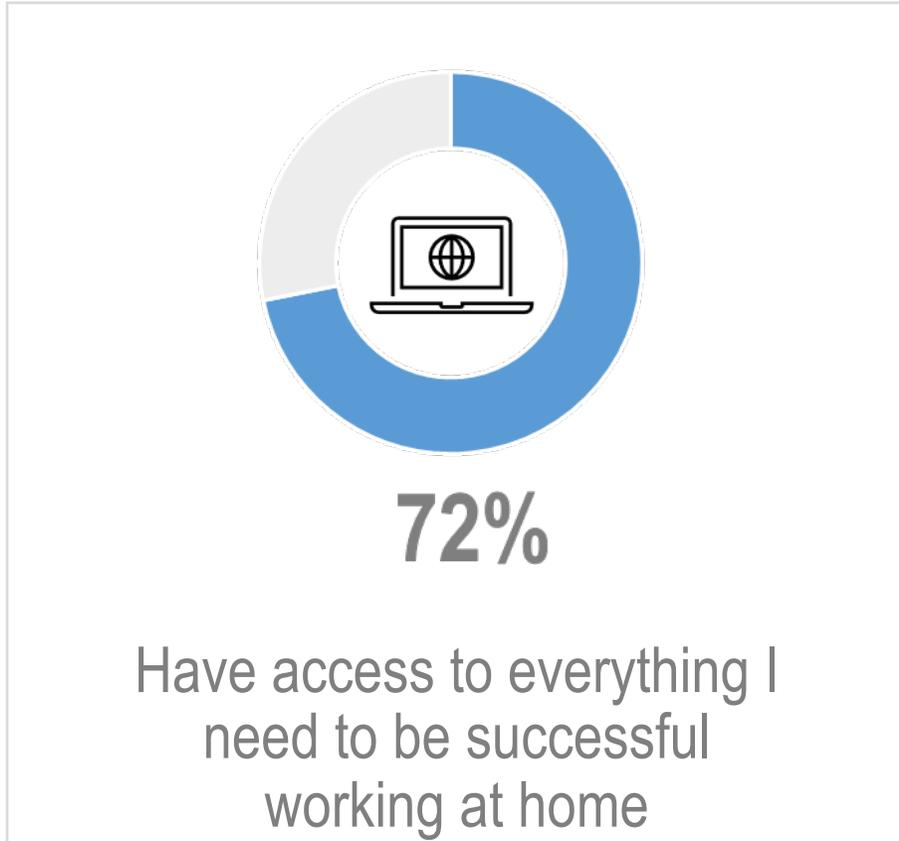


Generational & Geographic differences are particularly significant

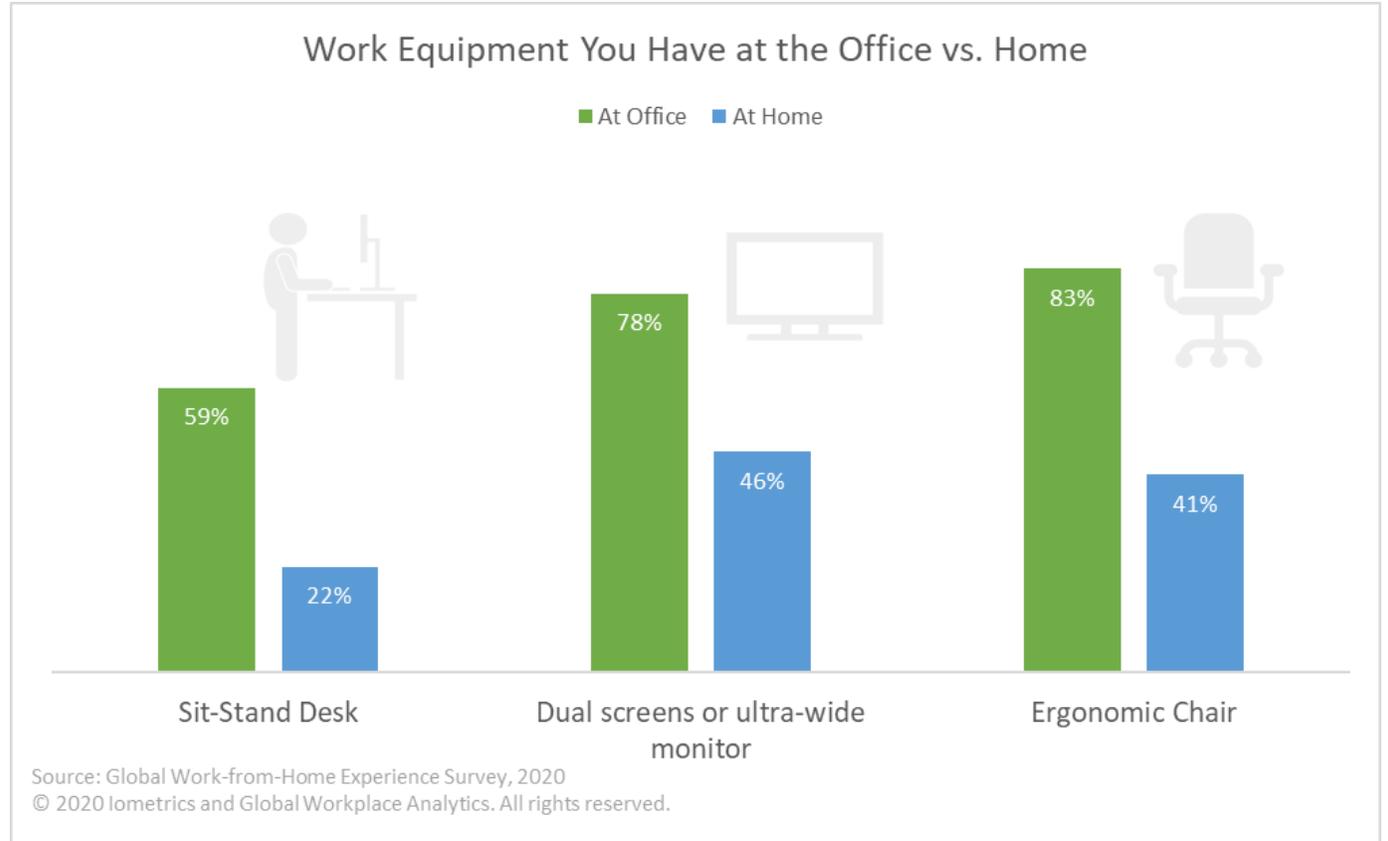
Source: Global Work-from-Home Experience Survey, 2020
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Note : Geography and Generation differences are statistically significant (p <.0001). Company size differences are statistically significant (p <.01).

Work resources at home

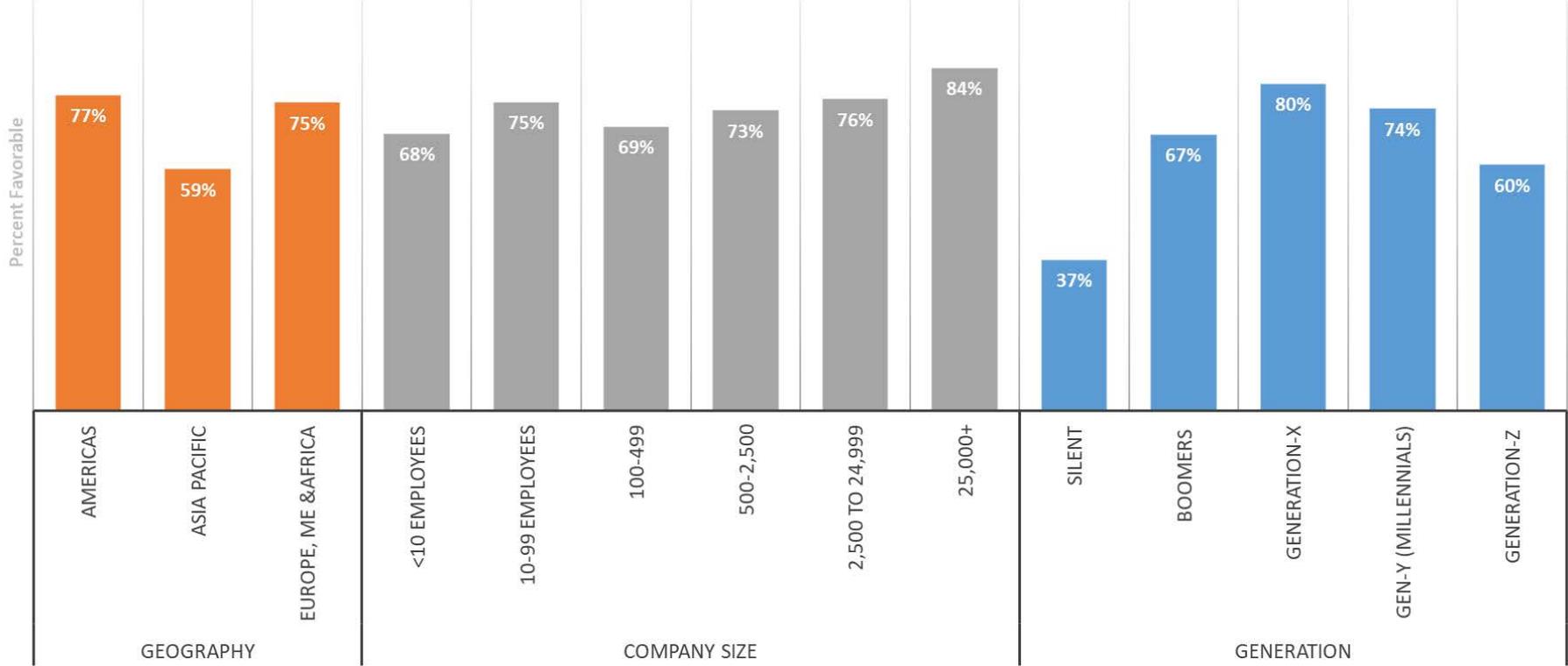


Source: Global Work-from-Home Experience Survey, 2020.
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Resource Access- Group Comparisons

I have access to everything I need to be successful working at home



Generational & Geographic differences are particularly significant

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Note: Geography, Size, and Generation differences are statistically significant (p <.0001).

Success Enablers



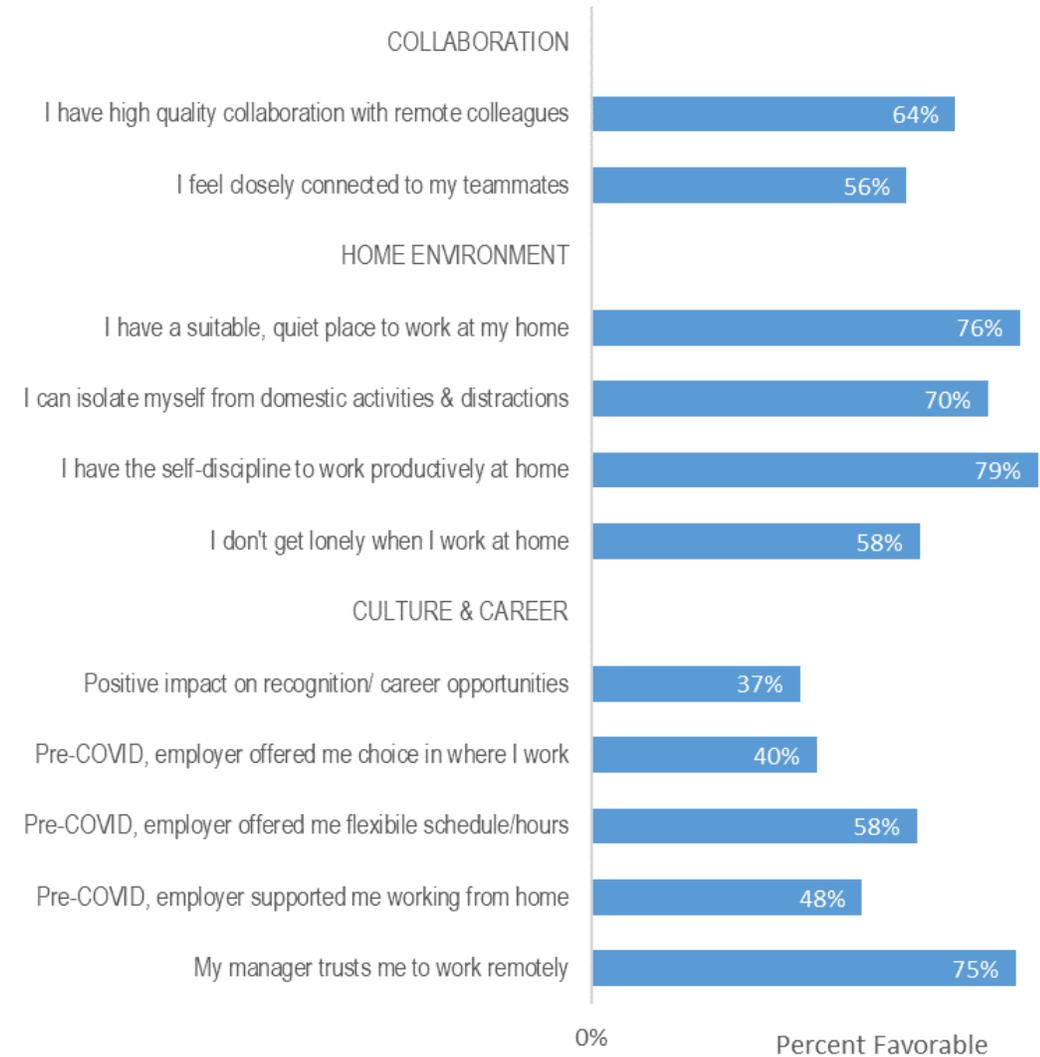
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61%

of employees are satisfied with remote work success factors

Working from Home Success Enablers



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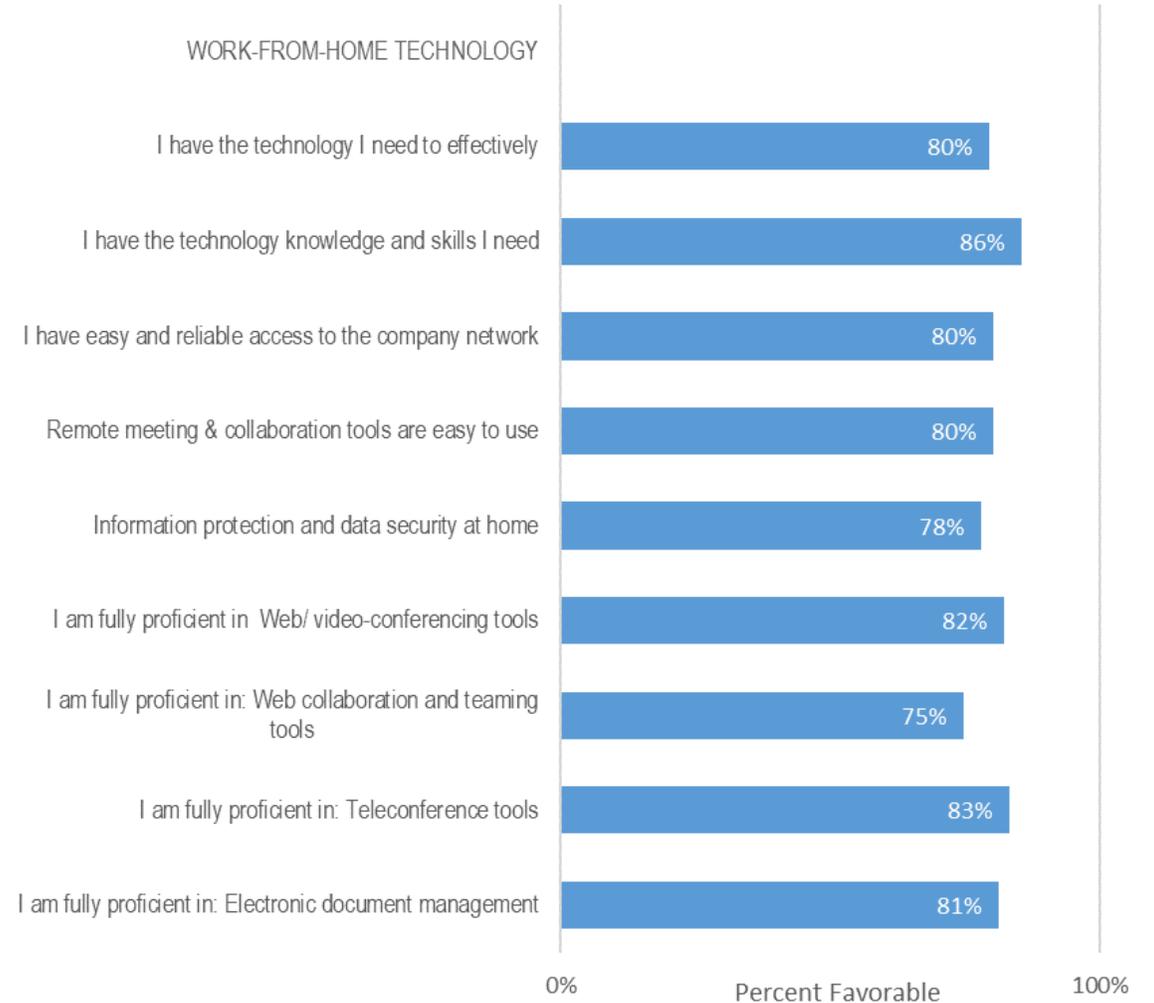
Technology Enablers



81%

of employees are satisfied with technology suitability and readiness, on average

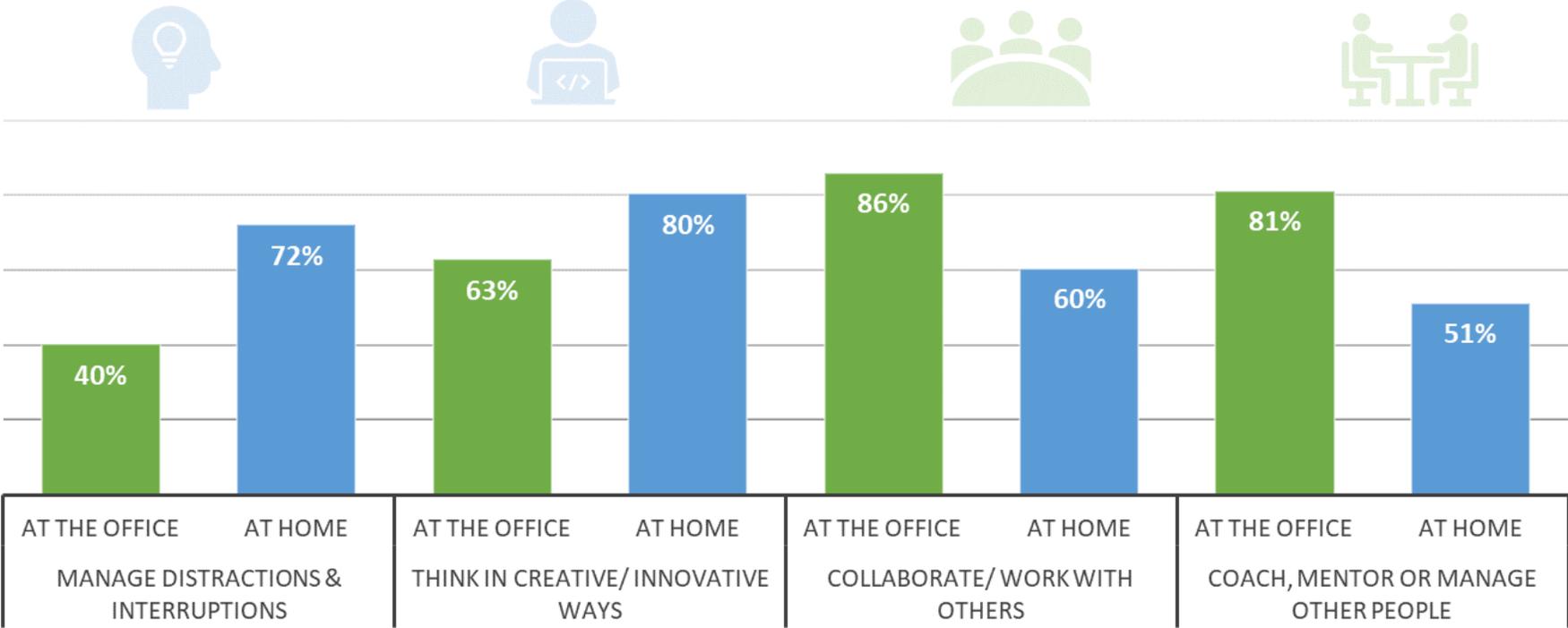
Working from Home Technology Enablers



Source: Global Work-from-Home Experience Survey, 2020
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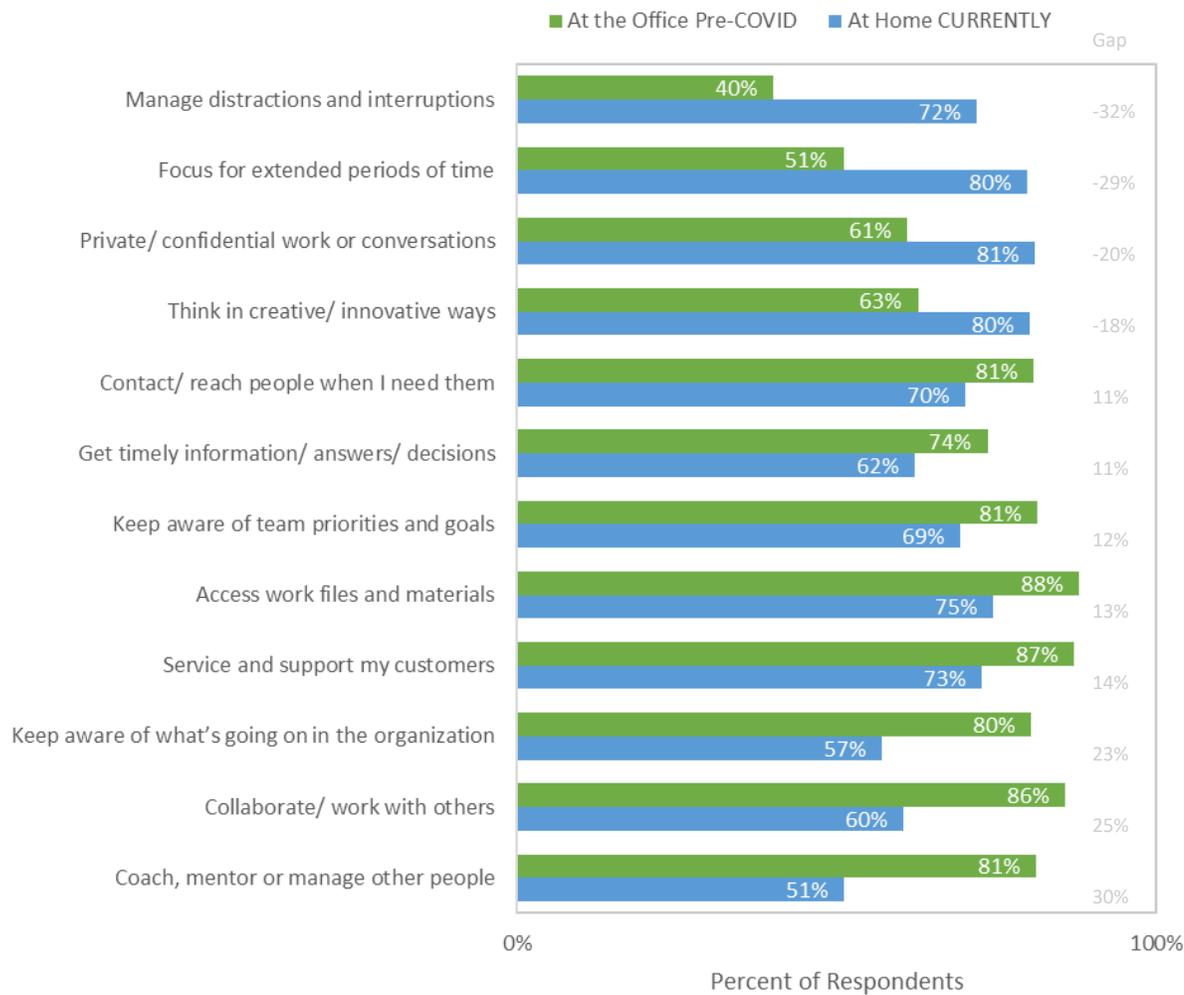
Work Activity Performance

Satisfaction with Work Activity Performance



Source: Global Work-from-Home Experience Survey, 2020
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Satisfaction with Work Activity Performance



Better Performance
at Home



Better Performance
at the Office



72%

of employees are satisfied with work activity performance* at the office, on average

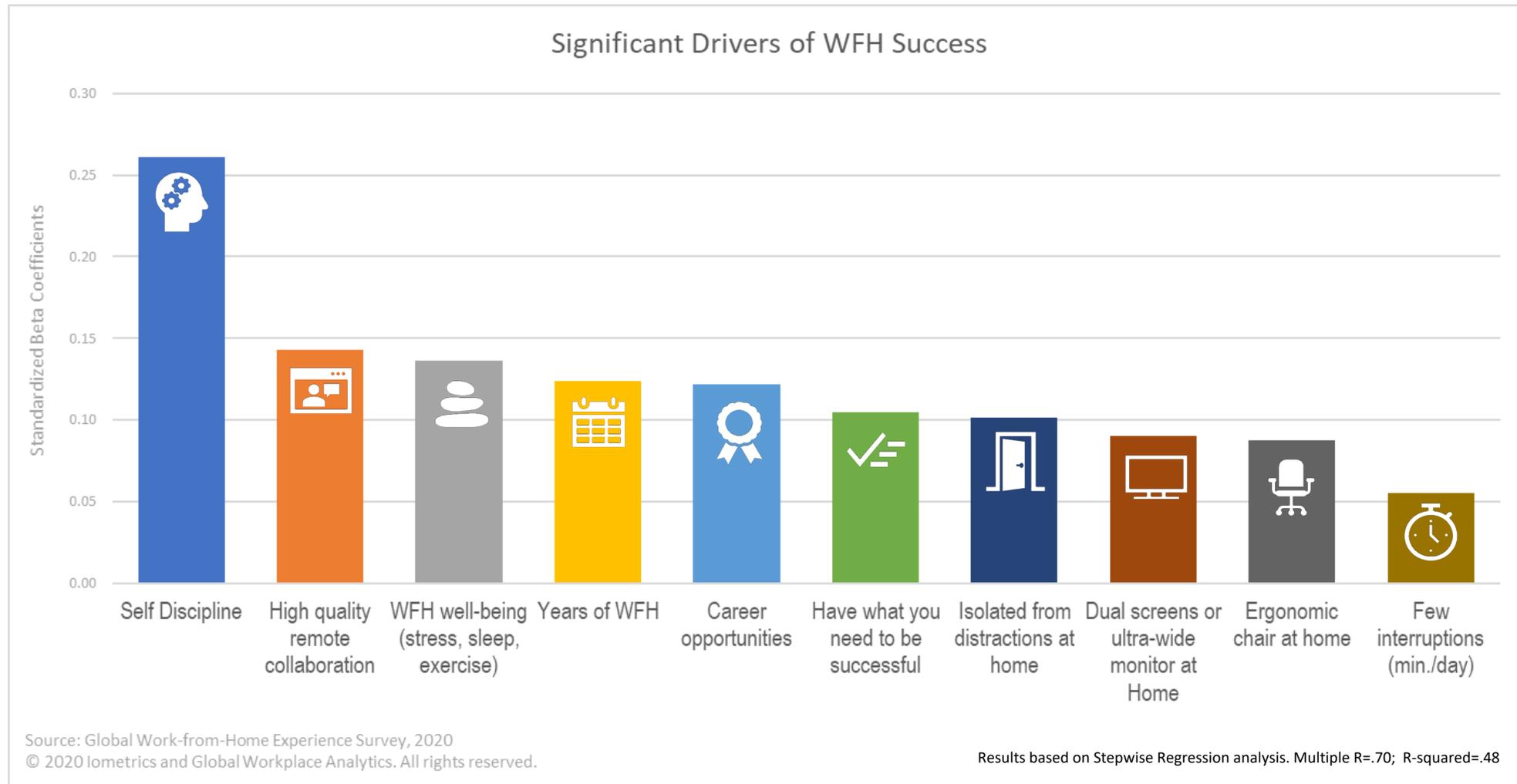
71%

of employees are satisfied with work activity performance* at home currently, on average

*Non-management activities

Source: Global Work-from-Home Experience Survey, 2020
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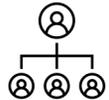
Predictive Analytics: significant drivers of WFH success





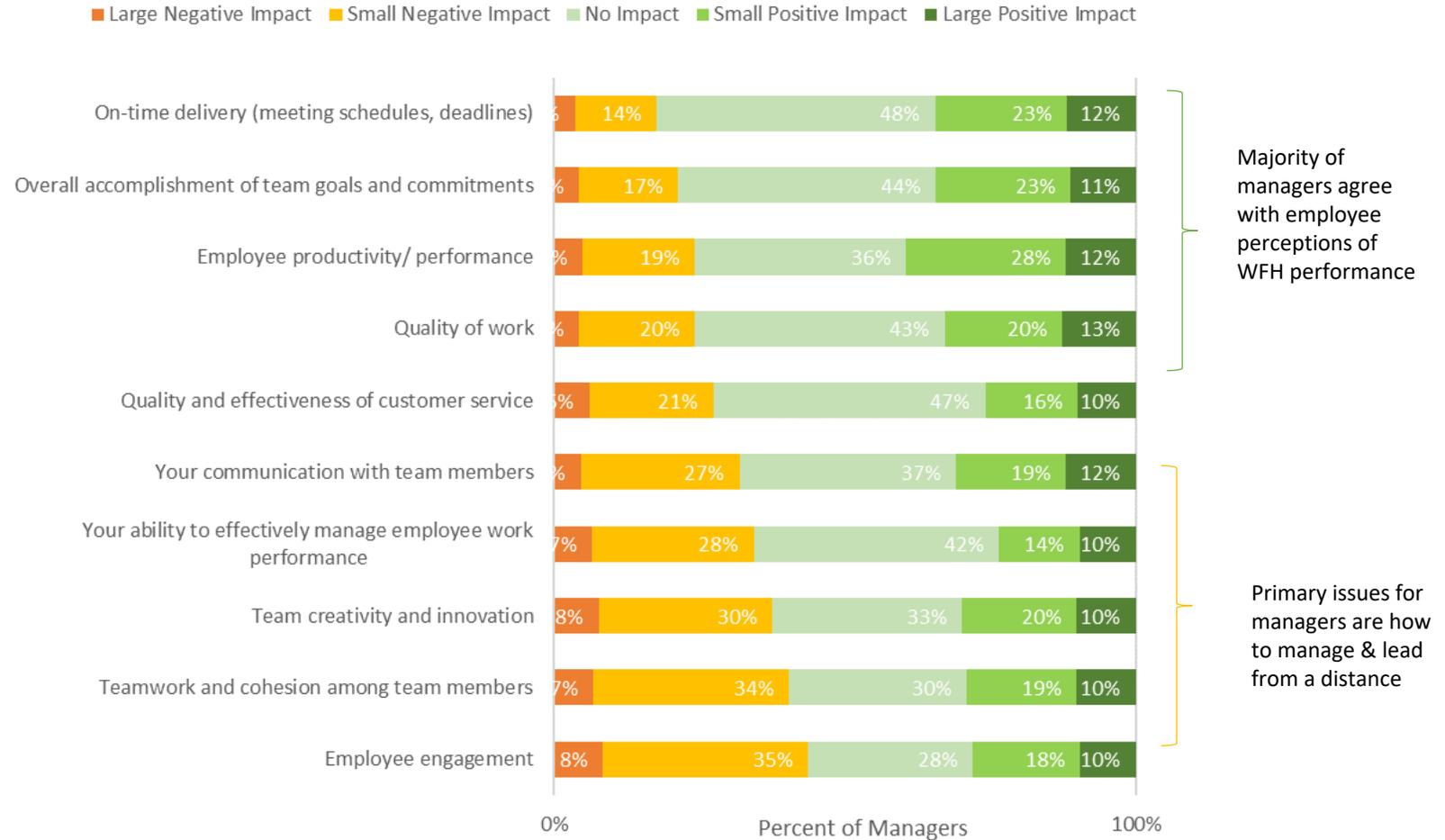
The Manager Perspective

Manager Feedback: WFH Impact



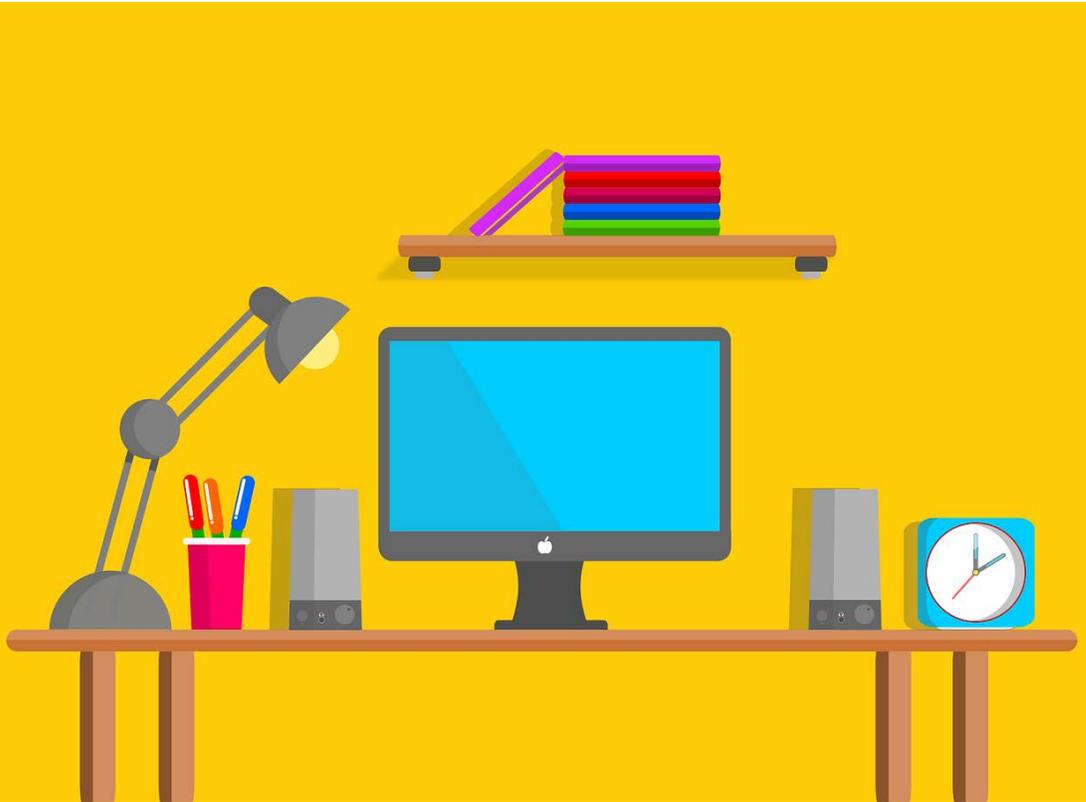
70%
of leaders say that WFH is the same or better for their team's work performance, on average

Impact of Work-from-Home on You and Your Team

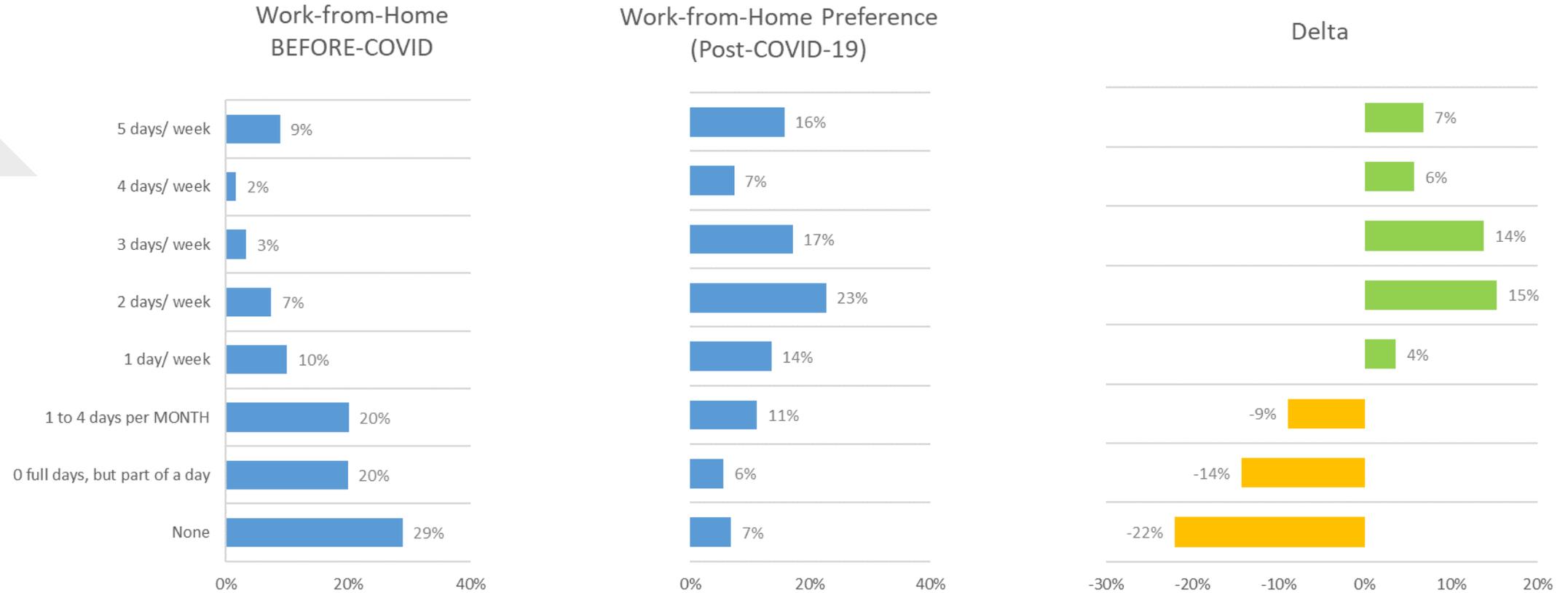


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Work-from-Home Preferences

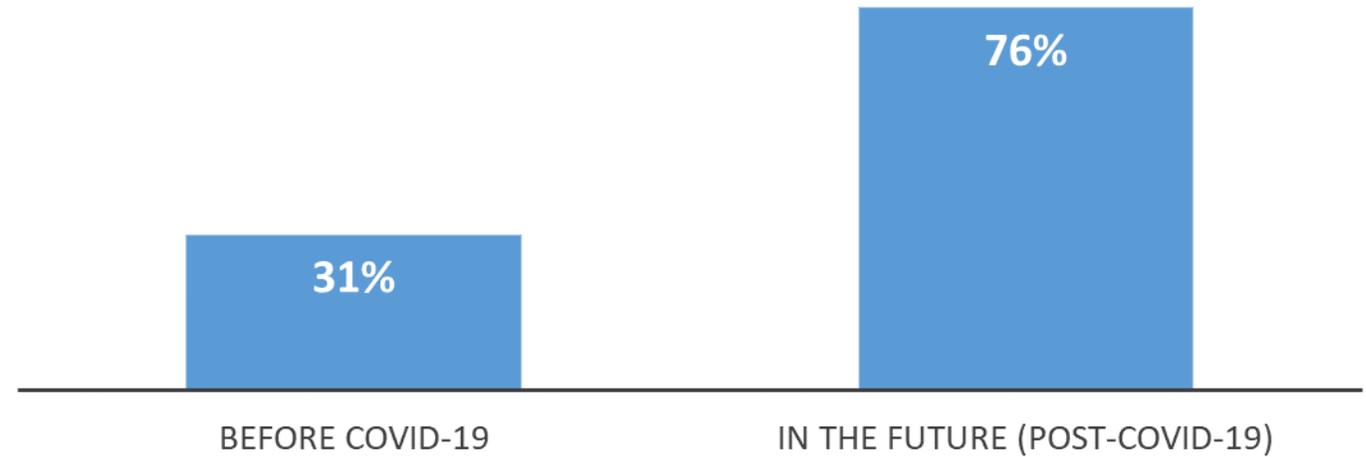


Work-from-Home Preferences



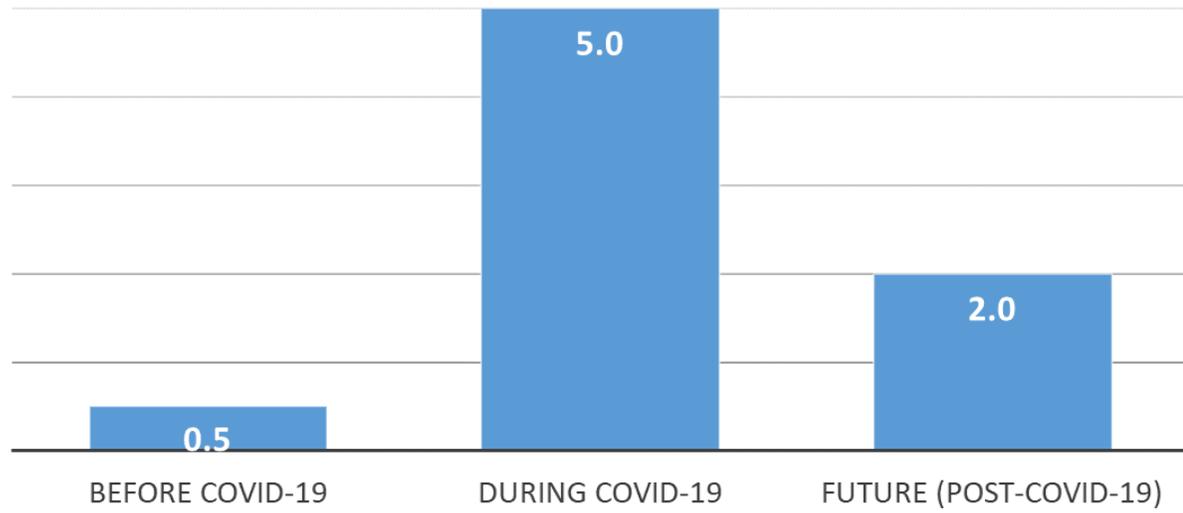
Source: Global Work-from-Home Experience Survey, 2020. © 2020 Iometrics and Global Workplace Analytics. All rights reserved.

Work-from-Home at Least 1 Day per Week

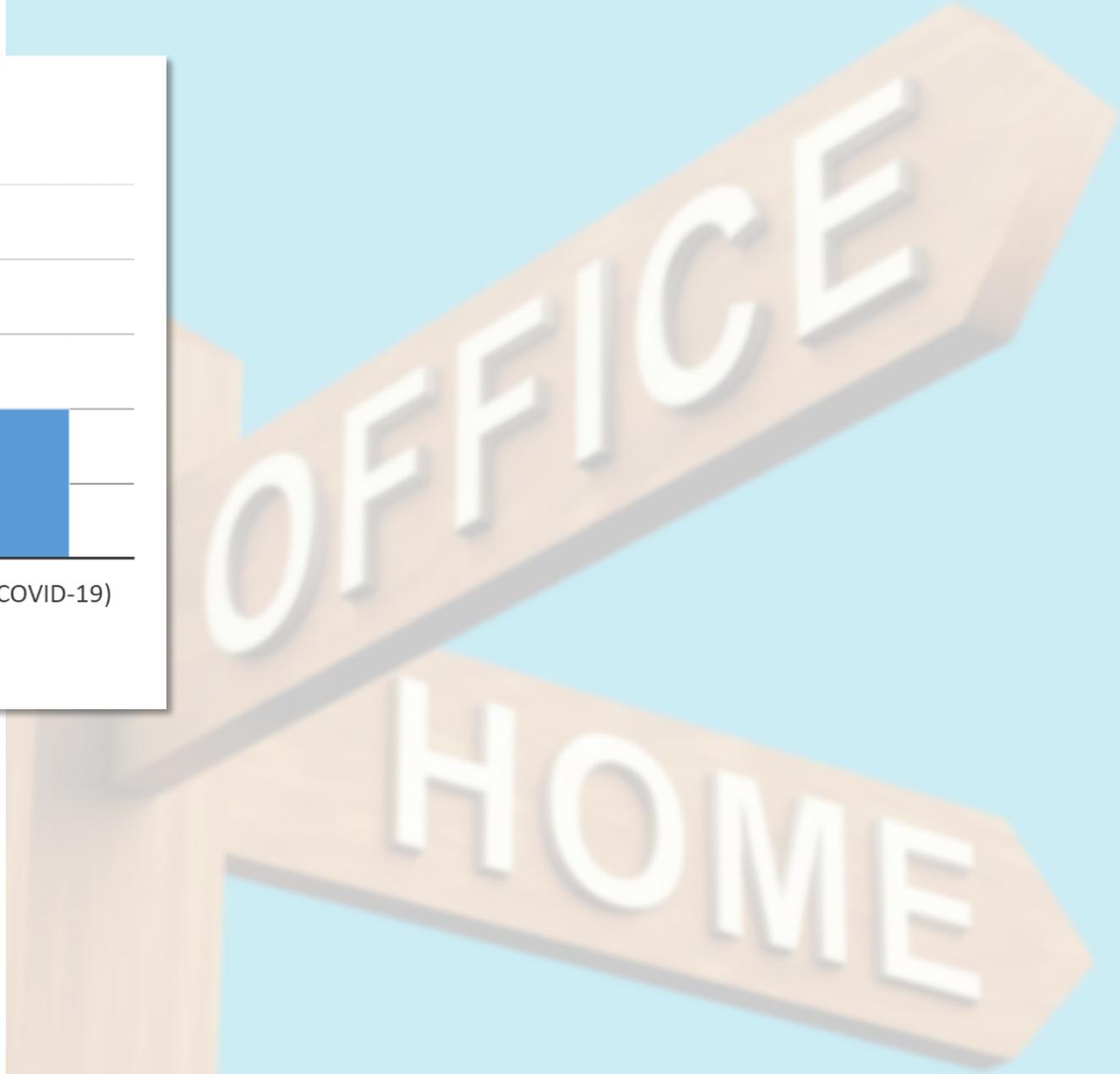


Source: Global Work-from-Home Experience Survey, 2020
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Median Days per Week Working at Home

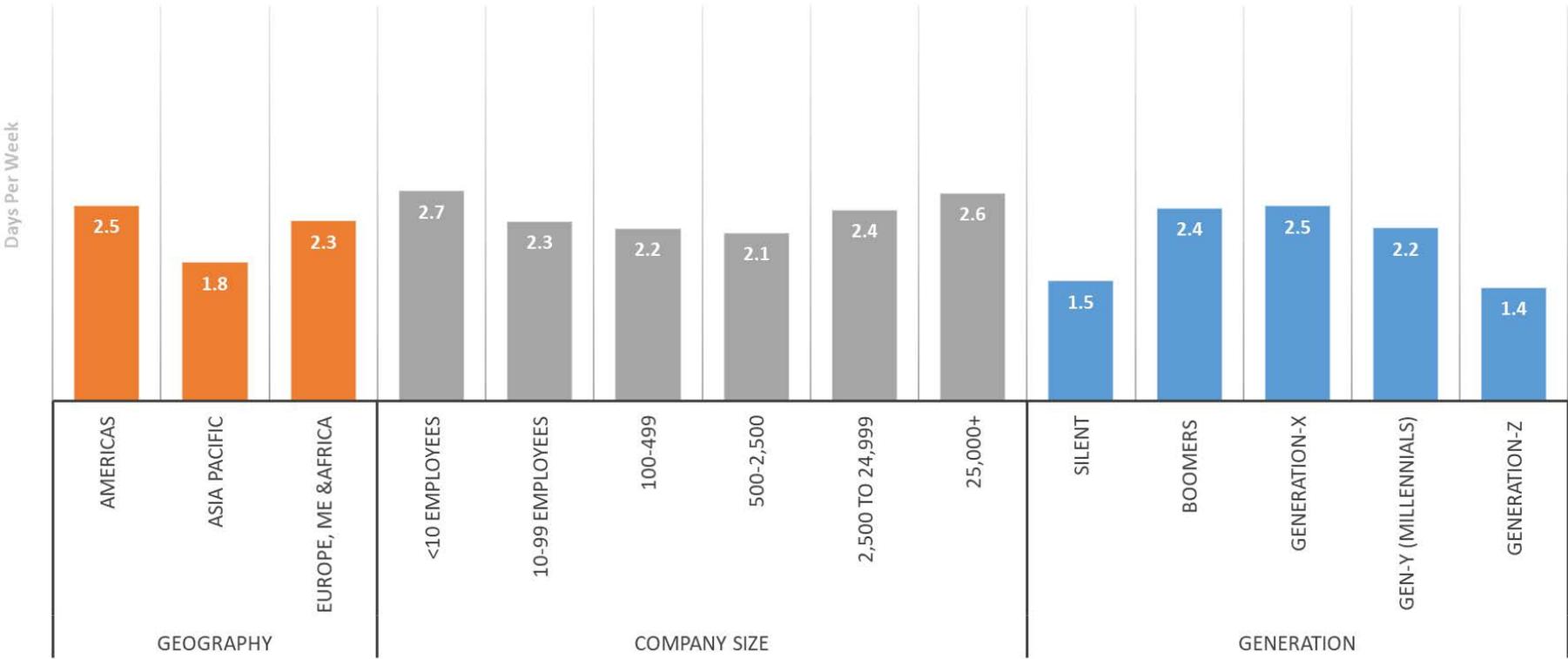


Source: Global Work-from-Home Experience Survey, 2020
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Preferred Work-from-Home

Average Preferred Days per Week Working at Home



2-3 days per week is typically preferred across most sub-groups

Source: Global Work-from-Home Experience Survey, 2020
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Note : Geography, Size, and Generation differences are statistically significant (p < .0001)

Well-Being Benefits



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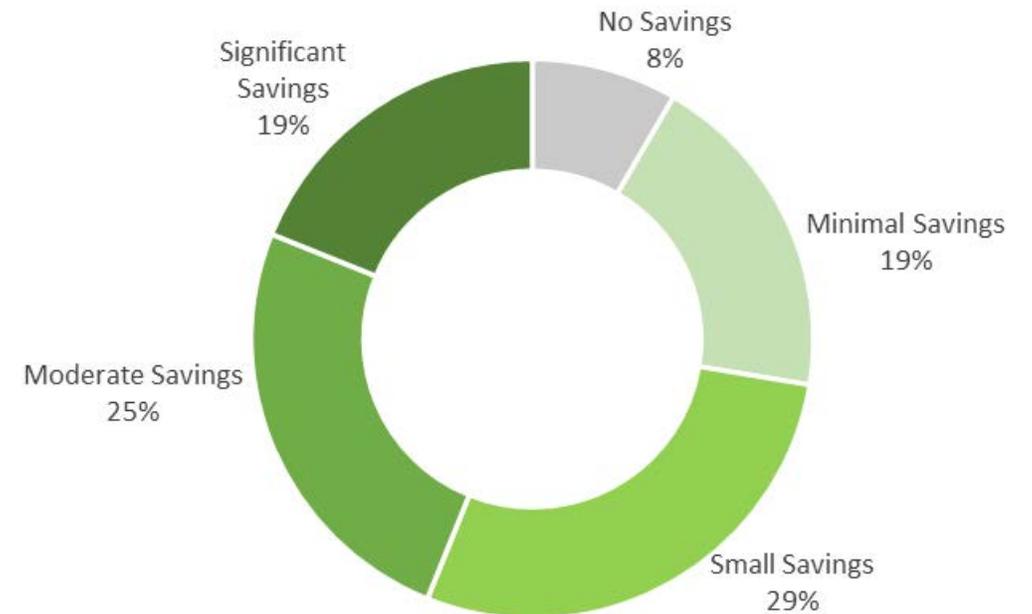


Employee Time – 9.4 Days/Year at 2x WFH

Employee Savings



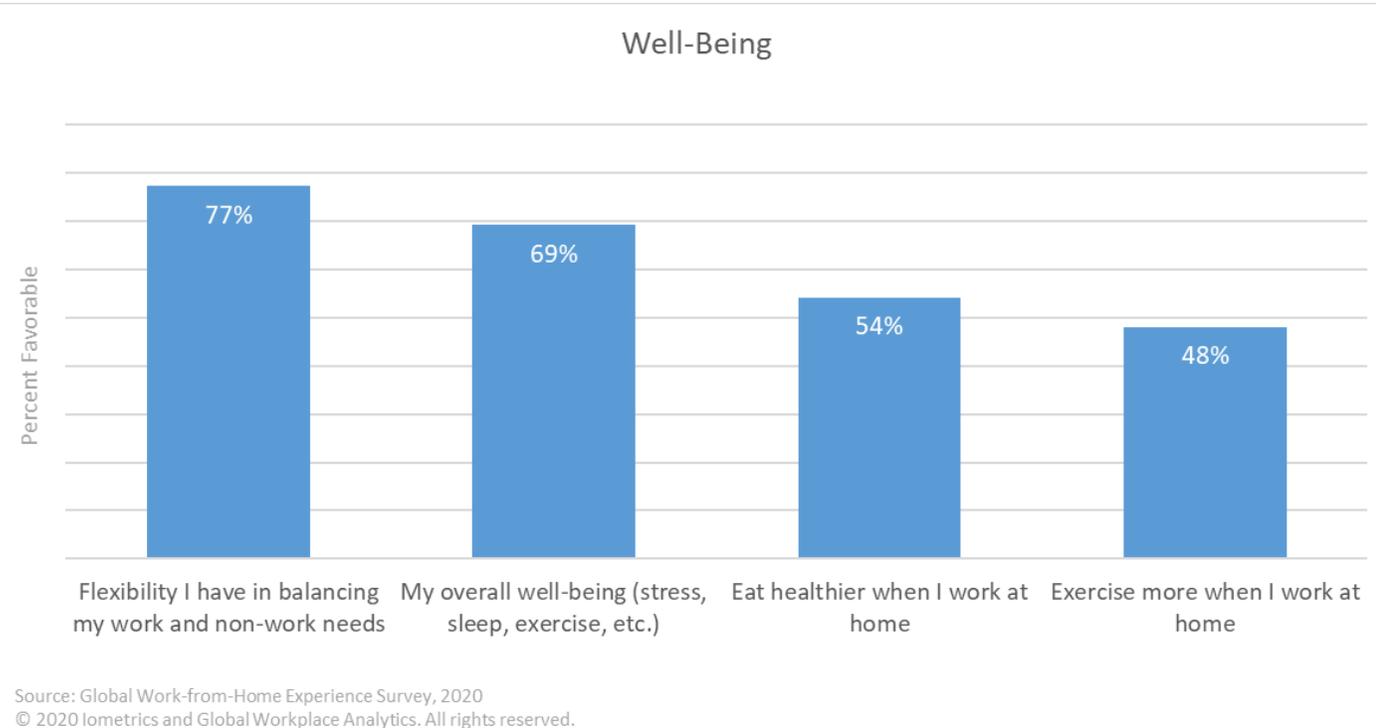
Do you save any money as a result of working-from-home (e.g., gas, transportation costs, dry cleaning, auto maintenance, lunches, etc.)





Employee Health

Participant Benefits of WFH

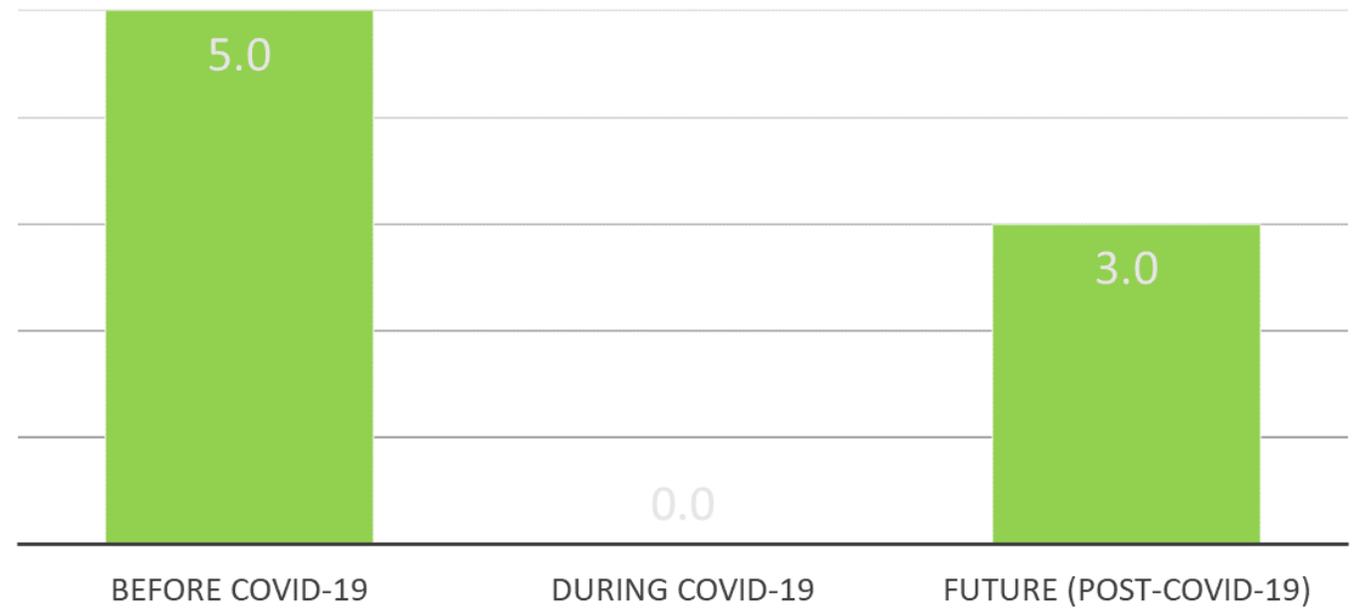




Commute Avoidance

Preferred levels of work-from-home will reduce commute days to the office

Median Commute Days to the Office



Source: Global Work-from-Home Experience Survey, 2020
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Typical commute patterns differ by geography

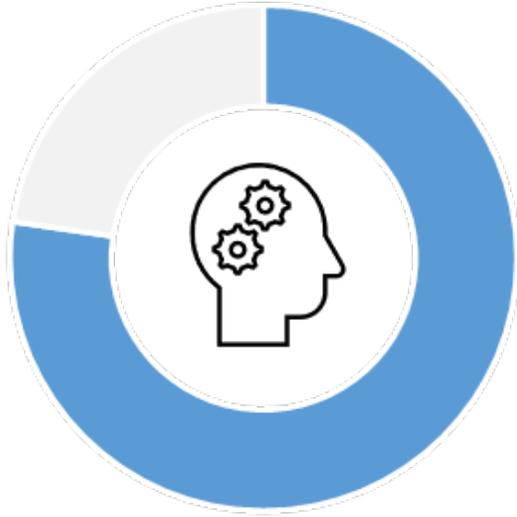
Typical Mode of Commute Transportation - By Geography



Source: Global Work-from-Home Experience Survey, 2020
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Employee Productivity





77%

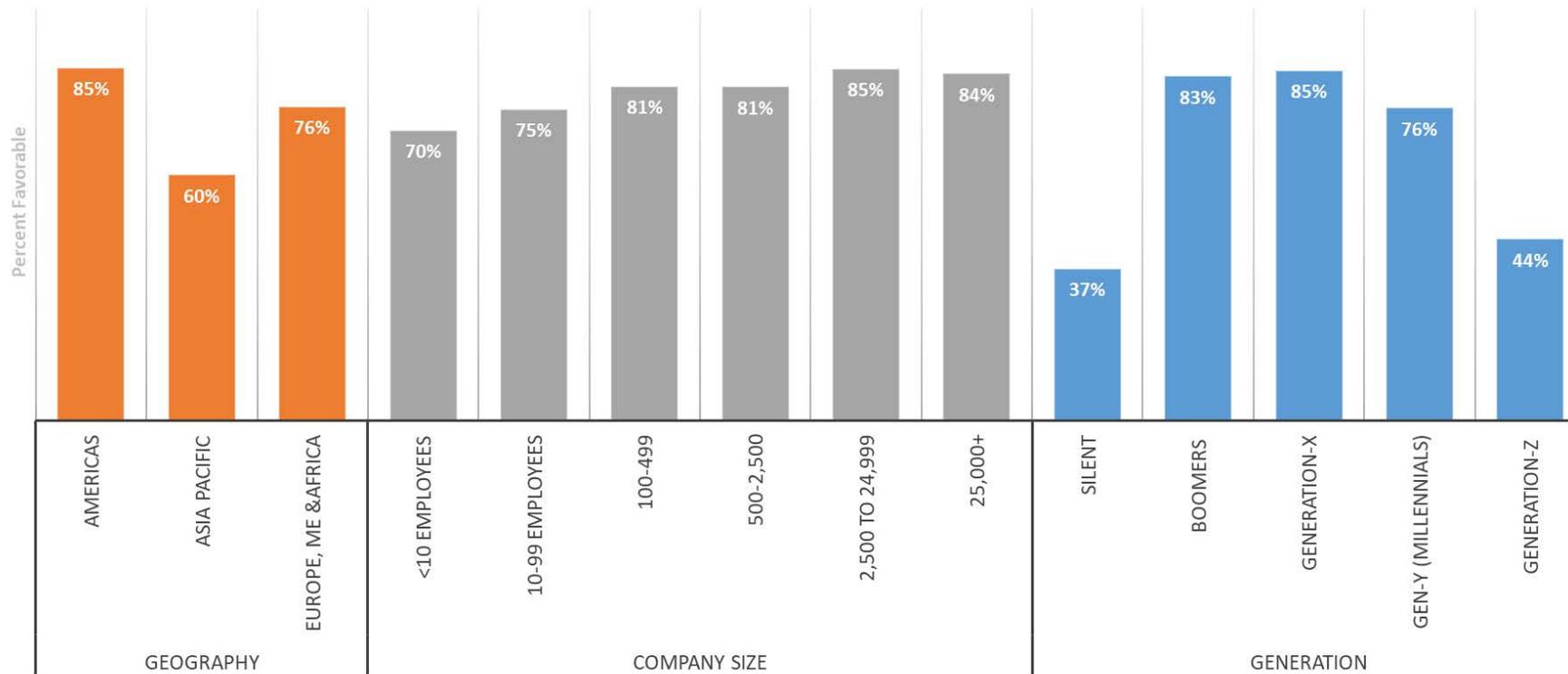
Are fully productive
working from home

Source: Global Work-from-Home Experience Survey, 2020.
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Productivity – Group Differences

I am very productive working from home



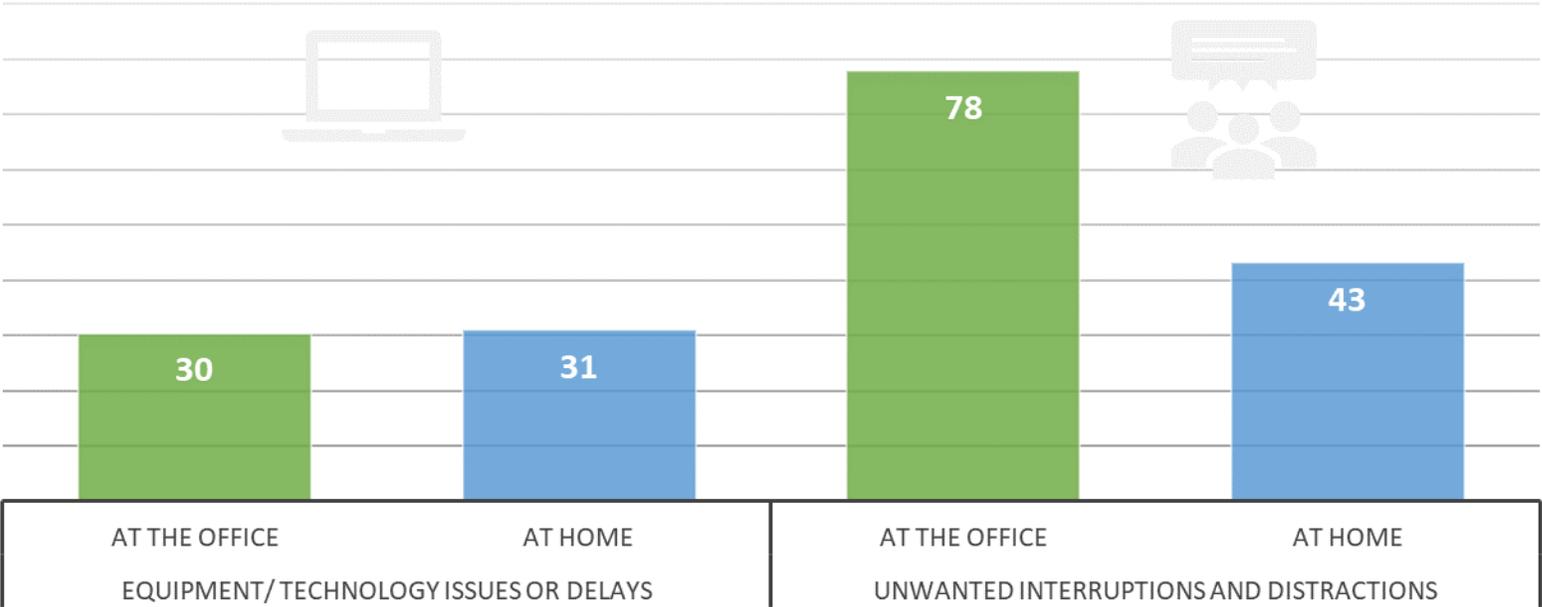
Generational & Geographic differences are particularly significant, while productivity has a positive trend with increasing company size

Source: Global Work-from-Home Experience Survey, 2020
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Note : Geography, Size, and Generation differences are statistically significant (p <.0001).

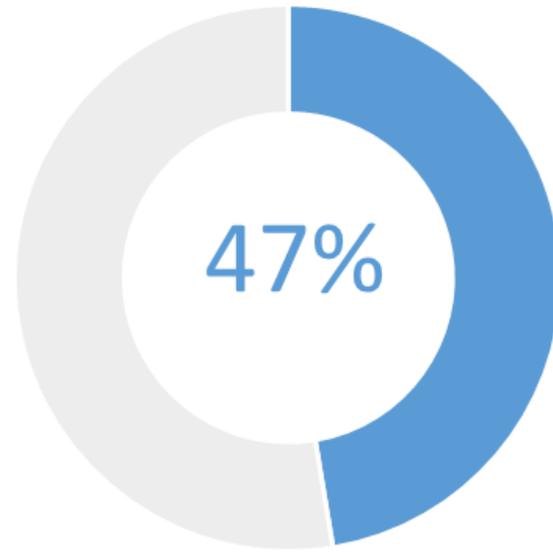
Technology/Interruptions

Productivity Inhibitors: Estimated Minutes per Day

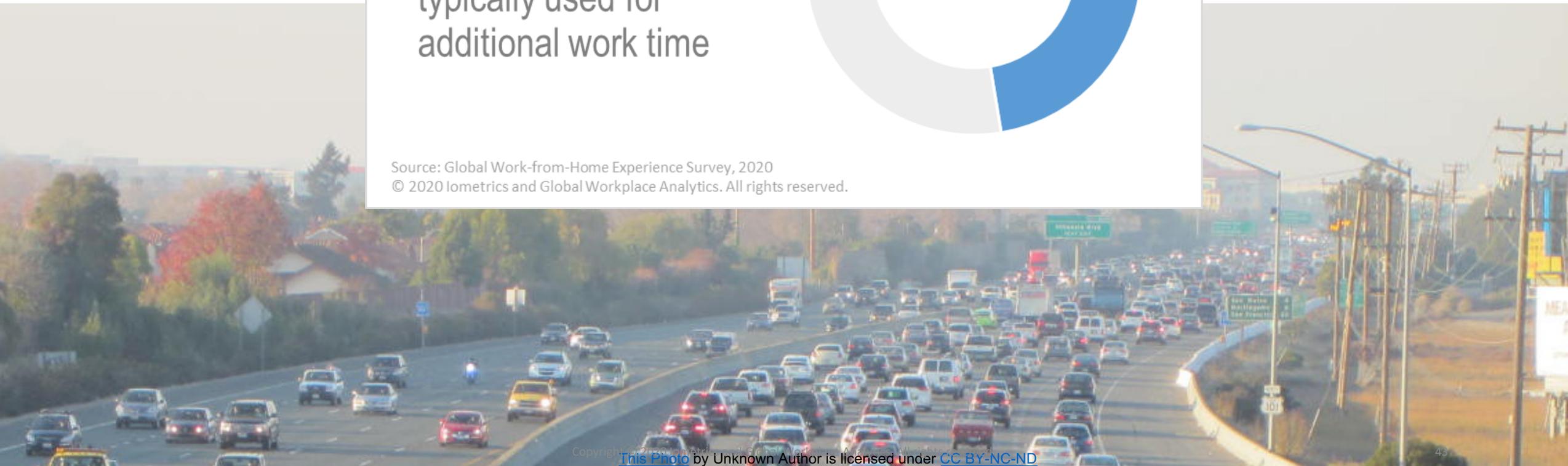


Source: Global Work-from-Home Experience Survey, 2020
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Percent of avoided commute time
(by working at home)
typically used for
additional work time



Source: Global Work-from-Home Experience Survey, 2020
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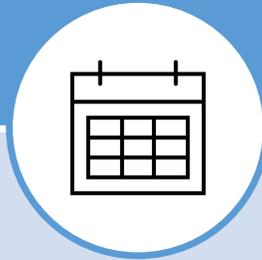
With preferred amount of WFH...

75



Incremental commute hours saved per year

9.4

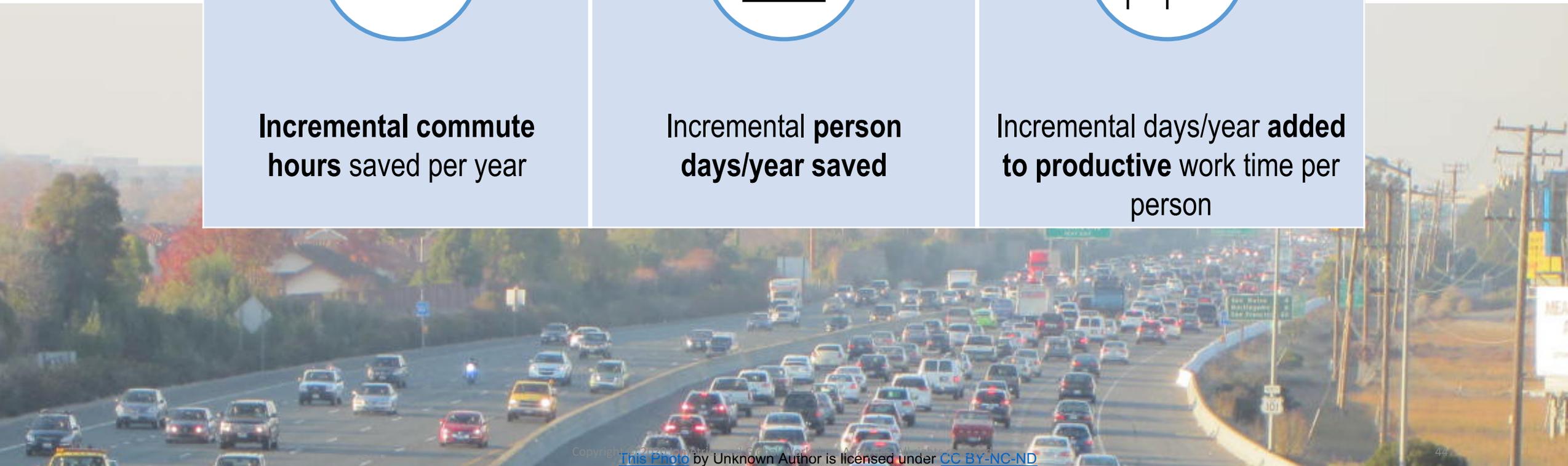


Incremental person days/year saved

4.6



Incremental days/year added to productive work time per person



Workspace Opportunities

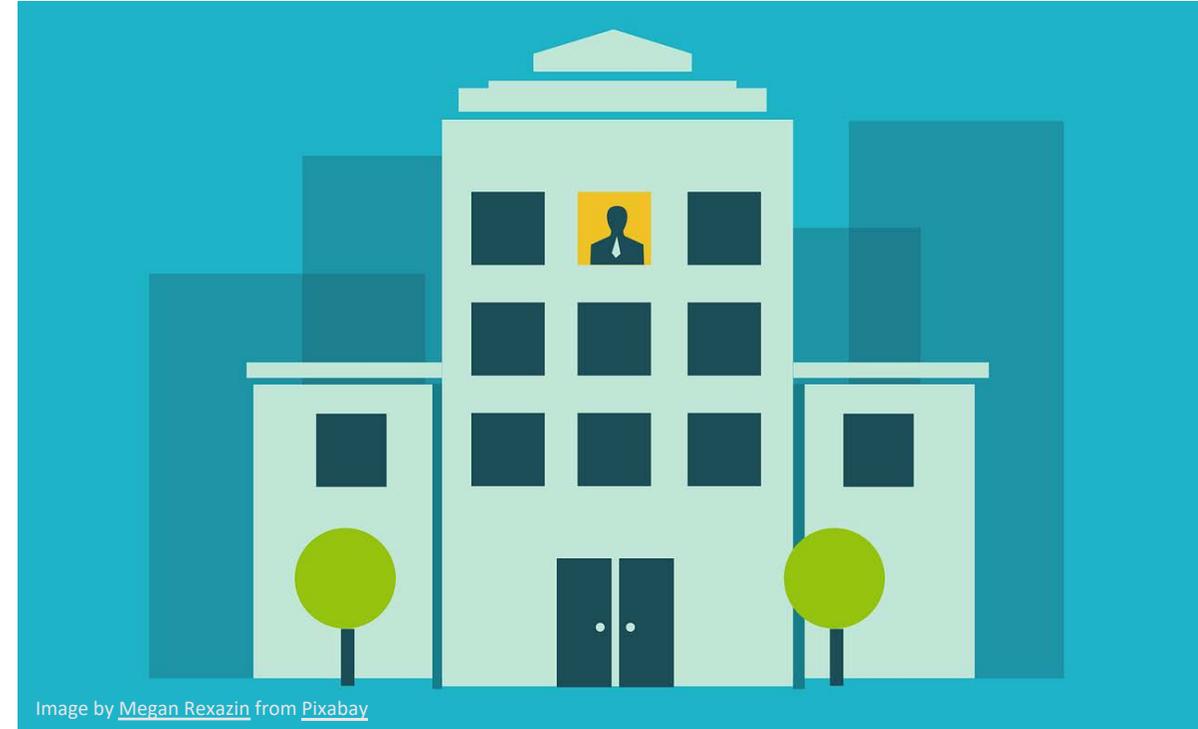
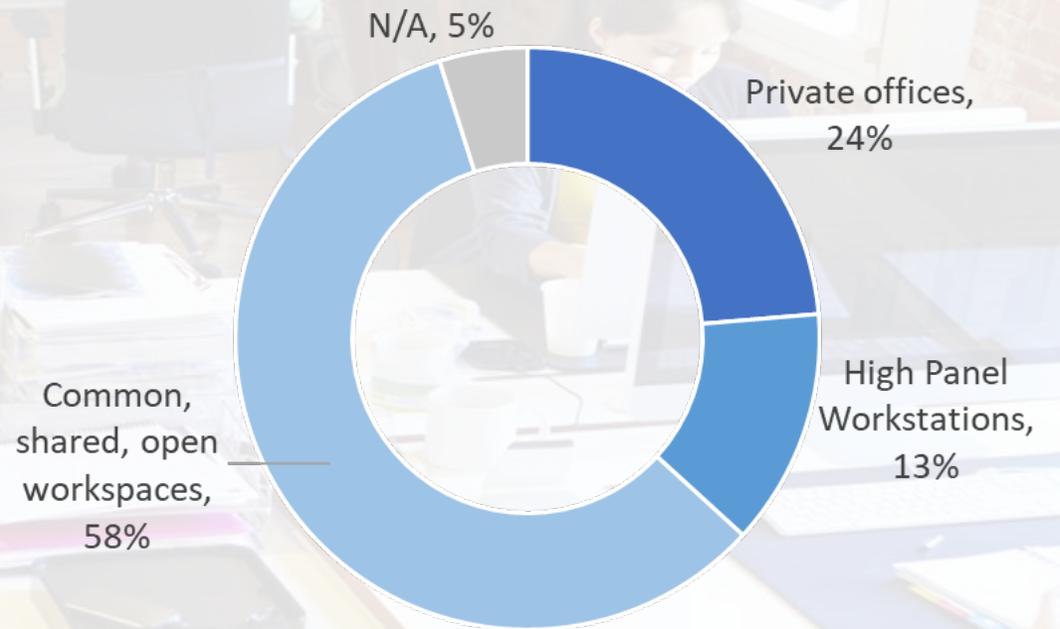


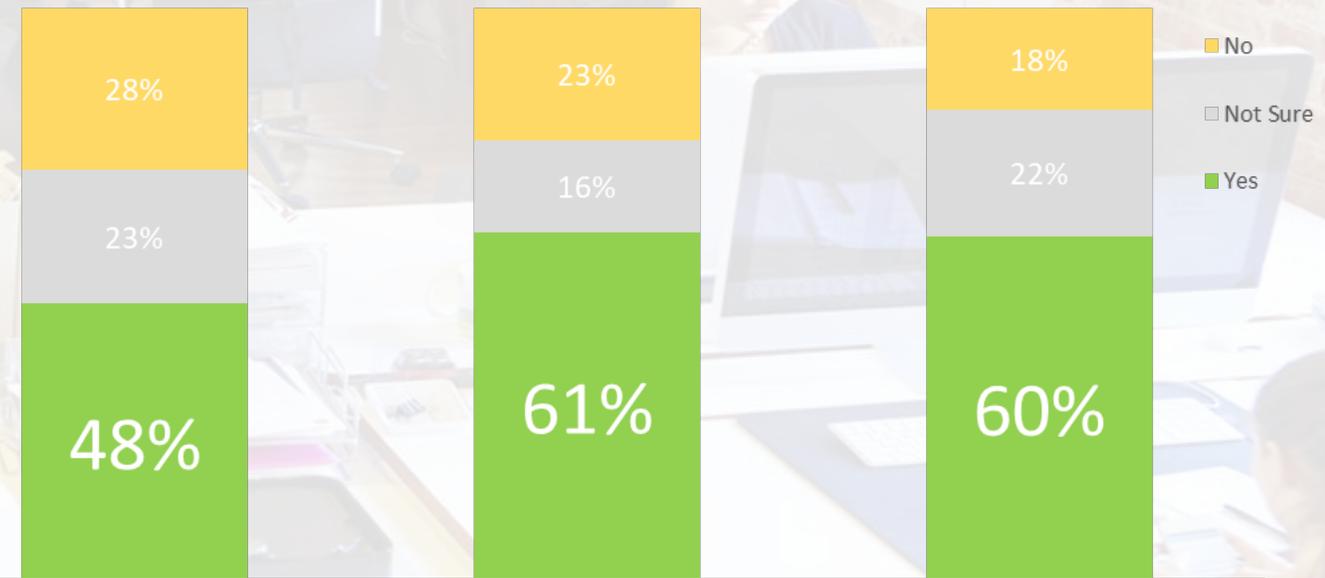
Image by [Megan Rexazin](#) from [Pixabay](#)

Workspace You Use at the Office



Source: Global Work-from-Home Experience Survey, 2020
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Would you give up your assigned workspace in exchange for an unassigned workspace in order to work-from-home in the future?



Private offices

High Panel Workstations

Common, shared, open workspaces

Source: Global Work-from-Home Experience Survey, 2020
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Would you give up your assigned workspace in exchange for an unassigned workspace in order to work-from-home in the future?



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Note: Geography differences are statistically significant (p<.05)

“When you go through something like this, it forces you to ask questions and think about things differently,”

- CEO of **Goldman Sachs**

“Our bias against working from home has been completely exploded.” He said employees have stayed engaged while at home and the company was “not seeing any discernible drop in productivity.”

- Chief People Officer of **Zillow**

“I don’t think we’ll go back to the same way we used to operate,” ... “I really don’t.”

- Chief HR officer at **Twitter**

Nationwide’s Left the Building. Insurer Makes Remote Work Permanent in 5 States.

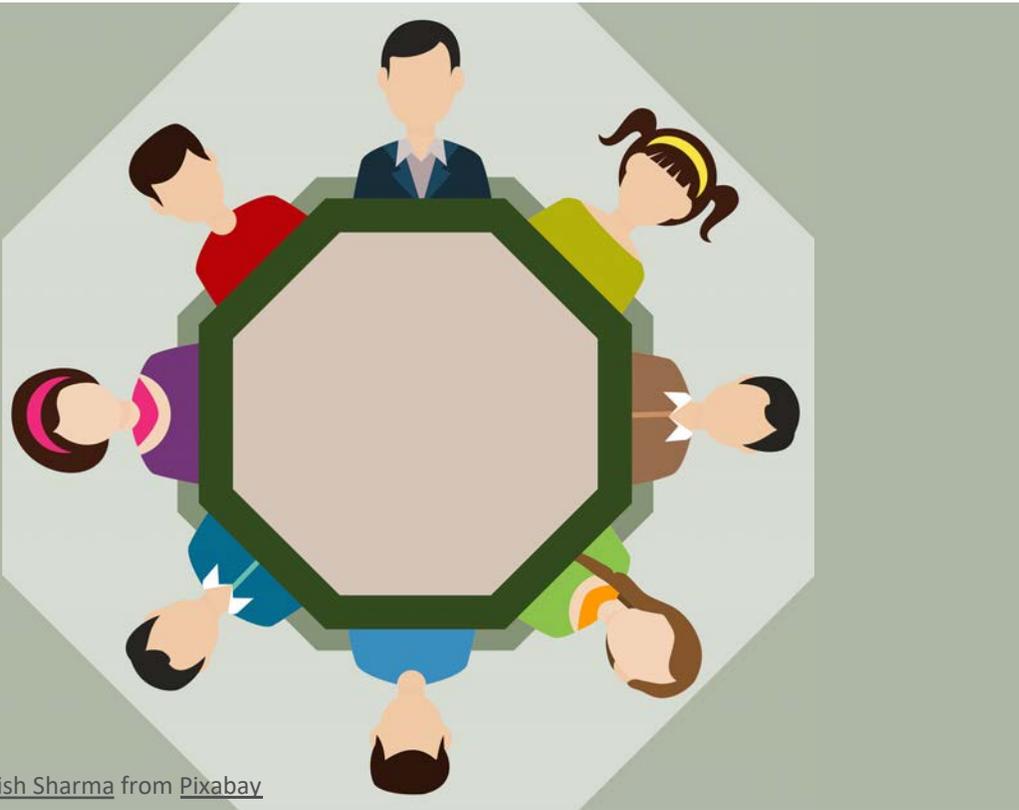
BMO says 80% of its employees may switch to blended home-office work

Bank made a sweeping reappraisal of workplace policies after it found being in the office was not essential to getting things done



Triple Bottom Line Impacts





Triple Bottom Line Impacts: People

Image by [Harish Sharma](#) from [Pixabay](#)

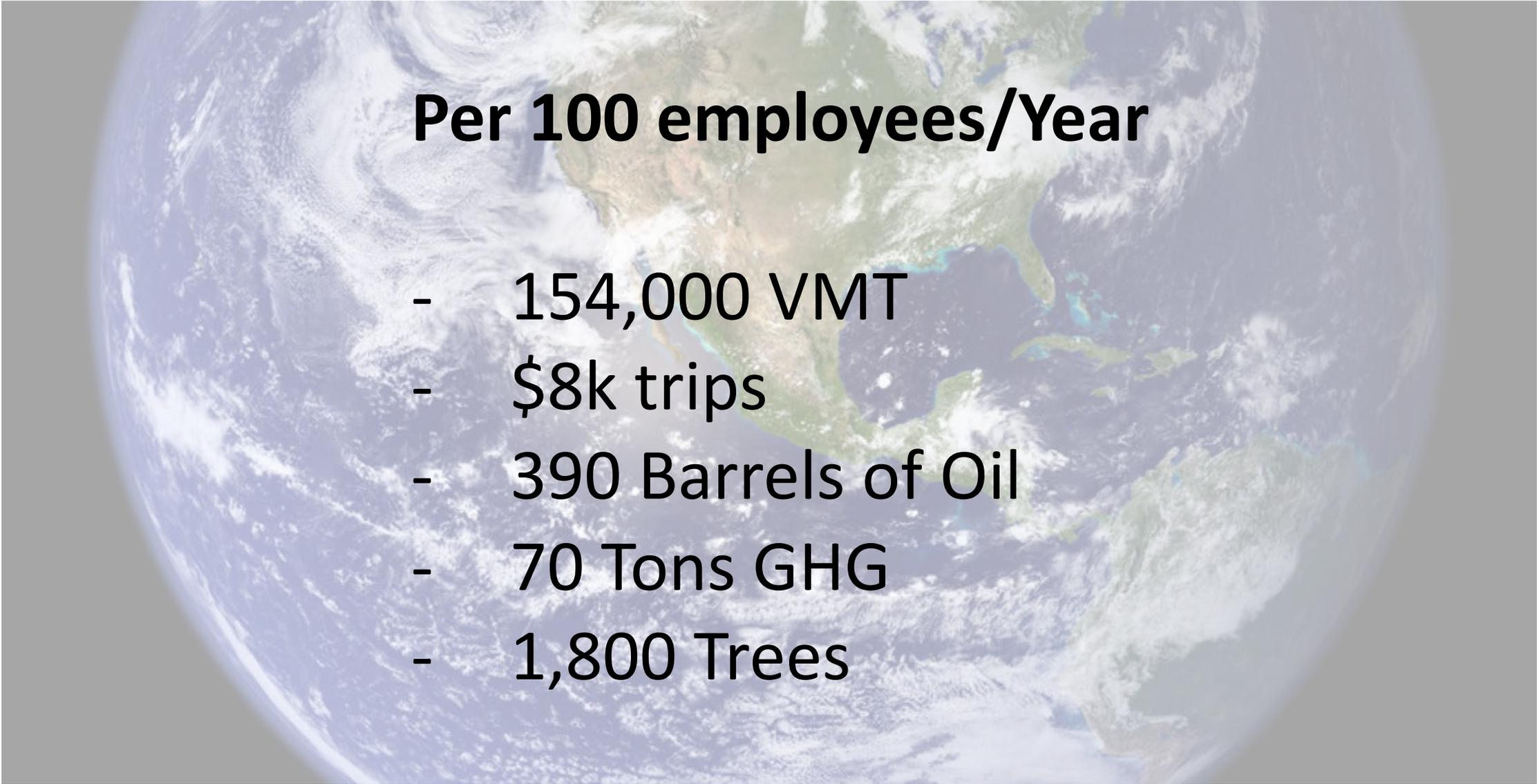




Triple Bottom Line Impacts: PLANET



Commuting
3 days/week
vs. 5



Per 100 employees/Year

- 154,000 VMT
- \$8k trips
- 390 Barrels of Oil
- 70 Tons GHG
- 1,800 Trees



Triple Bottom Line Impacts: PROFIT

Image by [Megan Rexazin](#) from [Pixabay](#)

WARNING

**Math
Ahead**

REMAIN CALM



Quantifying Productivity

Salary = \$50,000
Cost = \$65,000
= \$250/day
= \$30/hour
= \$.5/minute



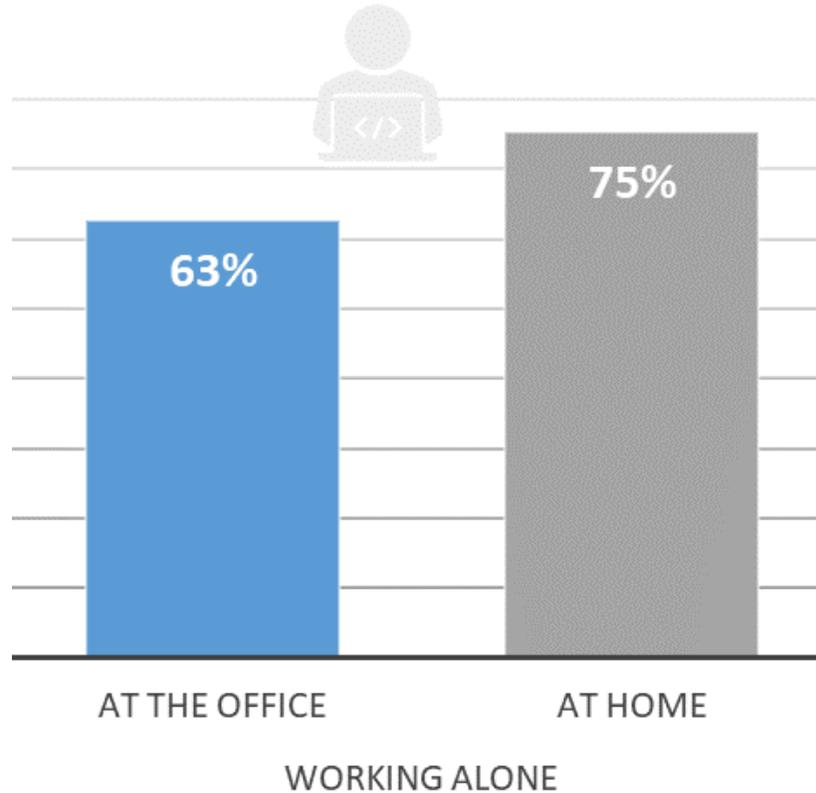
Engagement

+21% Productivity

**Per 100 Employees
+ \$1.4M**



More Productive Solo Work



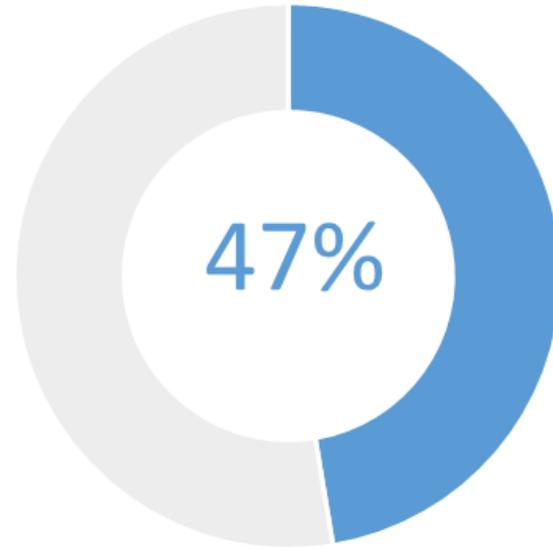
57% of time in solo work

19% increase

= 5.7% increase in productivity
for 2 days a week at home

= \$280,000/per 100 employees

Percent of avoided commute time (by working at home) typically used for additional work time



Source: Global Work-from-Home Experience Survey, 2020
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Per 100 Employees
2x/week

= \$140,000/Year
= 2.2 Person Years

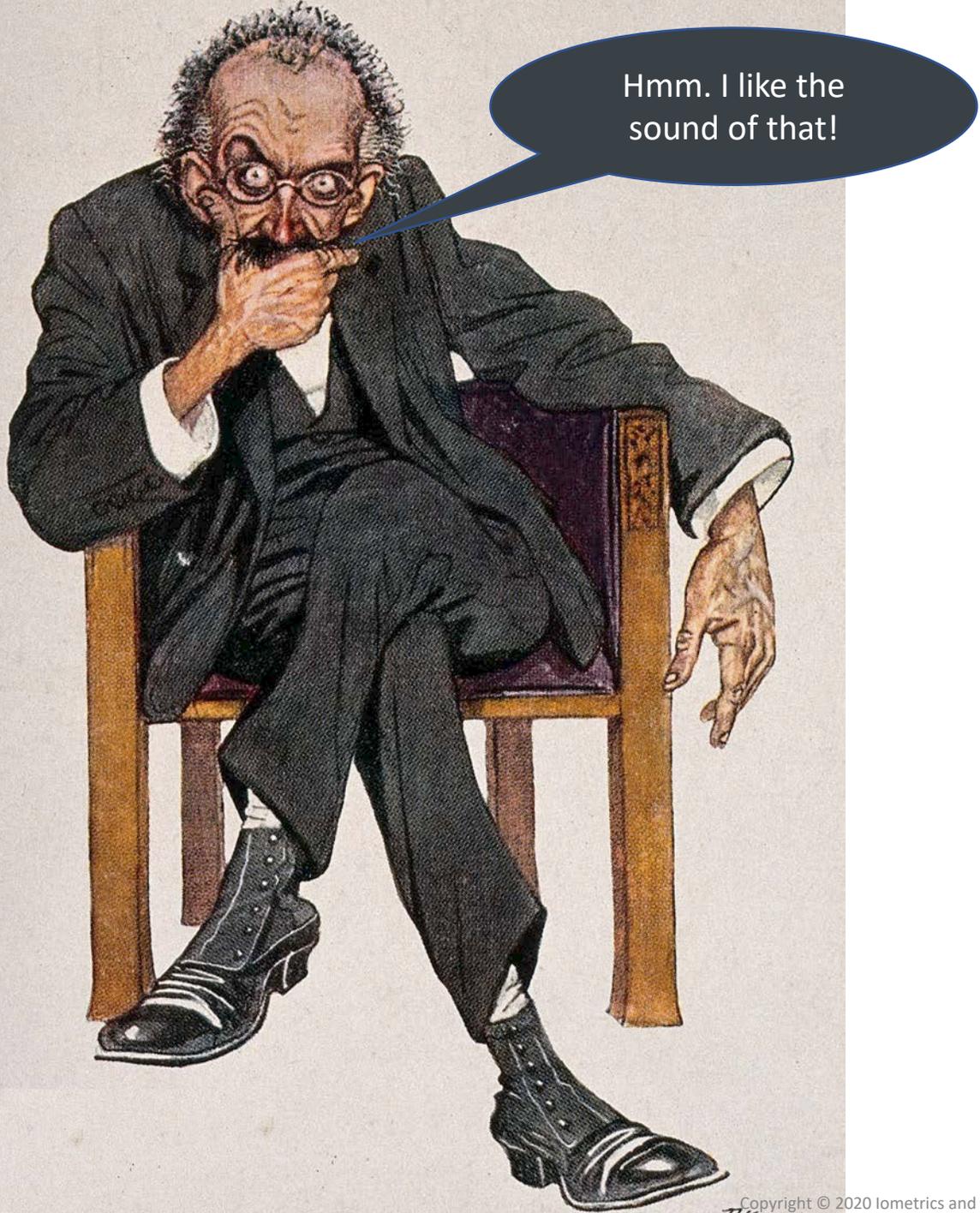




Interruptions (mins/day)

Home = 43

Office = 78



Per 100 Employees
2x/week

- > \$200,000/Year
- > 3 Person Years



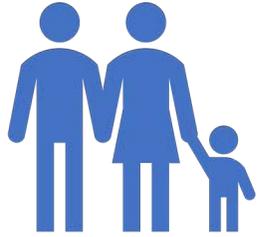
Productivity Lost if Not Able to Work
= \$26,000/100 employees/day

BETTER
IS
POSSIBLE

Example Space Savings Impacts

- 2x/week
- 150 sf/person, \$30/sf
- 10% to 20% decrease

= \$45,000 to \$90,000/year
Per 100 people



*Per Person:

- 9+ days/year
- \$2k to 4k/year
- Health: Priceless



*Per 100 Employees:

- 154k Miles
- 8k Trips
- 390 Barrels of Oil
- 70 Tons GHG

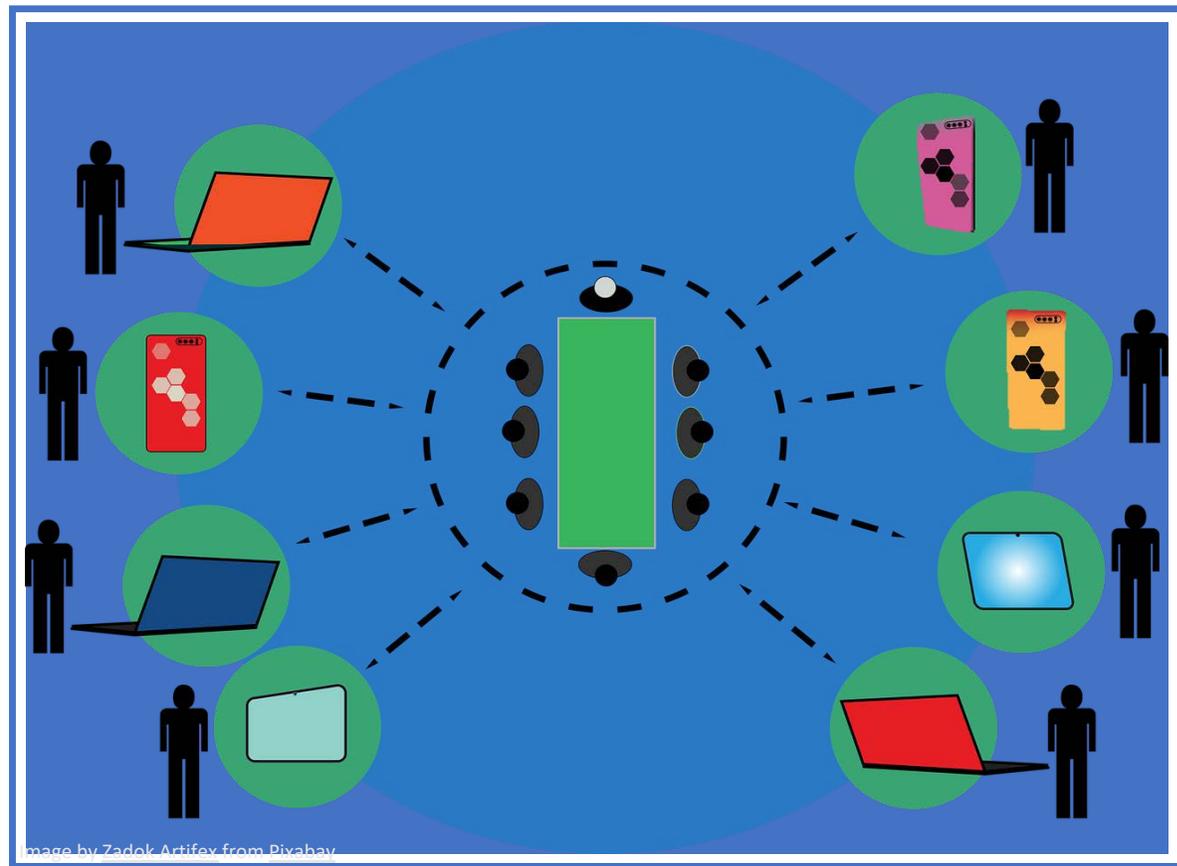


*Per 100 Employees:

- Real Estate: \$45-90k
- Engagement \$1.4M
- Solo Work \$280k
- Commute = \$140k
- Interruptions = \$200k
- COOP = 26,000/day

*Annual Impact

The Future of Work, and the Workplace



The top 10 things we learned



1. How many people are working from home now?

- 88% of office workers working from home >1 day/week
- 77% WFH full-time

2. Are people liking their work-from-home experience?

- 68% say they are very successful at working from home

6. Do people want to come back to the office?

- 76% want to WFH at least 1 day/week
- Prefer 2 days/week on average
- 16% don't want to come back at all

5. Are managers resistant to the idea of WFH?

- Agree work performance is same or better, but have issues with remote management and distributed teaming

4. Does providing WFH support enable success?

- 72% say they have what they need
- Greater likelihood of success if they have skills, tools, resources & good home environment

3. Do people work better at home or the office?

- Overall, 70% are satisfied with work activity performance at either place, but some activities are better performed at home vs. office

7. Are people productive at home?

- 77% fully productive at home
- Save ½ hour/day in unwanted interruption and give back half of saved commute to additional work time

8. Is WFH creating “burn out”?

- 77% are satisfied with flexibility in balancing work/non-work and 69% with overall well-being (stress, sleep, exercise)

9. Will we need less office space?

- Most want to come back 3-days/week. 40% less utilization.
- Majority are willing to give up assigned space to continue WFH.

10. Is there an ROI to continued WFH as a business strategy?

- People, Planet & Profit value



Will the accelerated WFH trend continue? We think so.



Many of the employees who couldn't work-from-home before the crisis, will want to keep doing it



WFH supports productivity, well-being, engagement & feeling of safety



Middle managers will be more likely to support remote work



Business Leaders and Investors will demand greater agility for business risk reduction



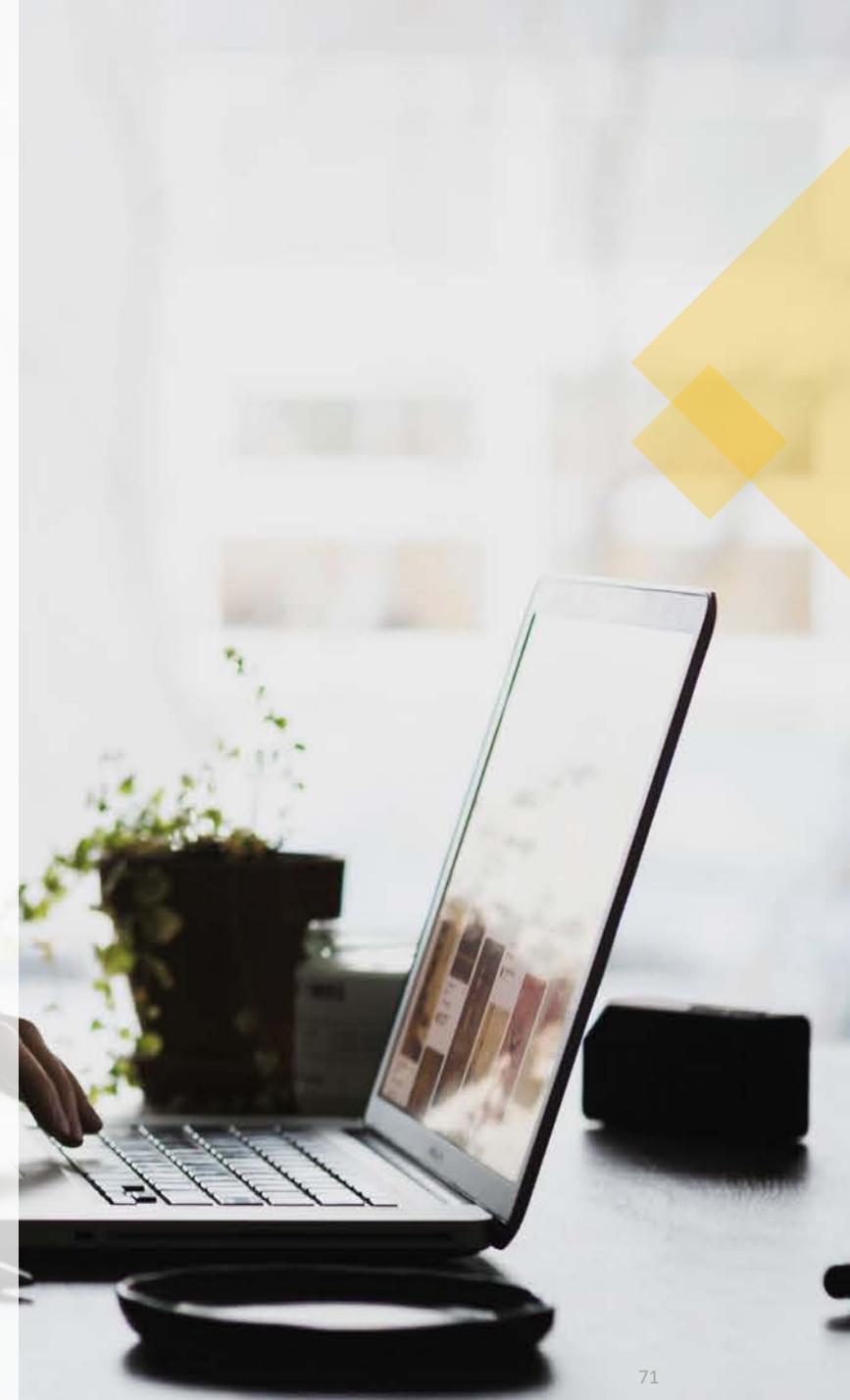
The experience will shine a light on the impact of commuter travel on sustainability



Economic woes will refocus attention on remote work as a CRE cost reduction strategy

How do we optimize the remote work experience?

- Technology foundation
 - Seamless remote collaboration
 - Pervasive video
 - Tool standardization and adoption
- Proper resources support WFH success
 - Laptops, VOIP, dual/wide monitors, ergonomic chairs
 - Productive home environment
- Managers will keep teams connected to the culture
 - Team cohesion, collaboration, innovation and engagement
 - Opportunities for virtual learning, socializing and mentoring
- Establish expectations with individuals
 - Maintaining work-life balance
 - Self-discipline and accountability
 - Remote collaboration and performance





The future of work, and the workplace

- How and where people work
 - A blended workplace
 - User experience across workplaces
- Work practice evolution
 - Location independent work process
 - Digital first
 - Continued acceleration of remote collaboration
- Workplace innovation
 - More focus work at home
 - Office work more “group focused”
 - Re-think and re-adapt open office trend
- Workspace utilization
 - WFH as a distancing strategy
 - Up to 40% reduction in utilization with WFH
 - De-densification vs. utilization



74% of CFOs say their company will reduce office space because employees have adapted to working from home, according to a survey of over 300 CFOs by Gartner, a Connecticut-based research and advisory firm.



What should employers do to prepare?

1

GET EMPLOYEE
FEEDBACK AND
INPUT



2

FOCUS ON
WORKPLACE
READINESS



3

CREATE A “DAY-
ONE” RETURN-
TO-OFFICE PLAN



4

IDENTIFY MID-
TERM CHANGES



5

EXPLORE LONG-
TERM
WORKPLACE
STRATEGIES





Let us help you

For questions, more information or help with back-to-office readiness post-COVID, please contact us:

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To listen to the webinar recording of this report, go to: <https://we.ifma.org/work-from-home-experience-survey/>



Let us help you
emerge from the
COVID pandemic
with new insights,
intelligence, and
approaches for
the future

Survey to your employees to assess their work experience and preferences

Improve employee productivity and team performance at home

Formalize your remote work program, policies and practices

Quantify the employer, employee and environmental impact of your remote work program

Integrate remote work into your CRE, HR, IT, Risk Management, and Sustainability strategies

Optimize your real estate footprint with a blended remote/on-site work model

Create a **return-to-office strategy** that addresses short-term readiness as well as longer-term success

And more...

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