

Return to Work / Back to Business Study, Part 2

Executive Summary

Leaders across the globe are faced with difficult decisions as COVID-19 surges in some areas and drops in others. Many are working to—or have already—reopened businesses and workplaces. **But people are still hesitant.**

While most organizations look at measures like hospitalizations, new cases, and testing rates, it is equally important to understand perceptions—how people feel. **At the beginning of May**, we ran a study of more than 2,000 **Americans** and asked people what needed to be true for them to feel confident returning to the workplace, dining at restaurants, and visiting other public establishments. Two months later, **in July**, we ran the same study to see how perceptions **in the U.S.** have changed.

61%

of Americans feel uncomfortable returning to the workplace today, down only slightly from 66% in early May.

GEN Z

to Boomers – no matter the age, Americans are equally uncomfortable going back to work, a finding that has stayed consistent across two months of research.

44%

of Americans think that we will never “get back to normal” — 48% thought the same at the beginning of May.

Executive Summary

Most employees aren't ready to take chances and expect significant precautions before they'll feel comfortable returning to the workplace. Here's how many employees **in the U.S.** said it was important to them that companies enact these safety policies before they come back in



Enforce social distancing (at least 6' of space between co-workers)

93%



Limit number of people in in-person meetings

90%



Require all employees to wear a mask

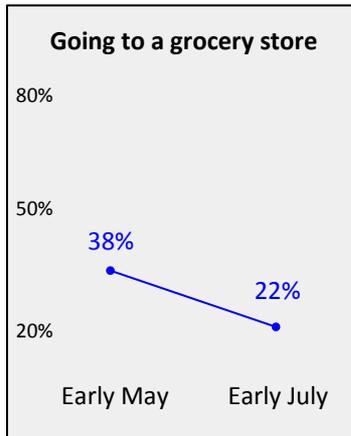
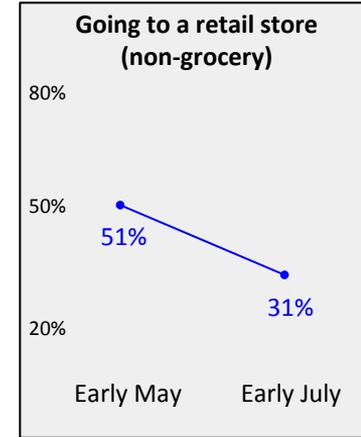
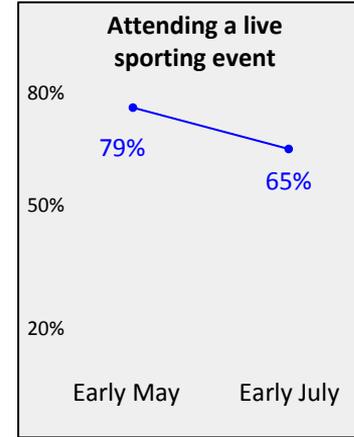
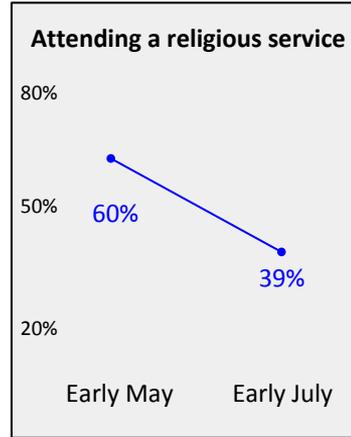
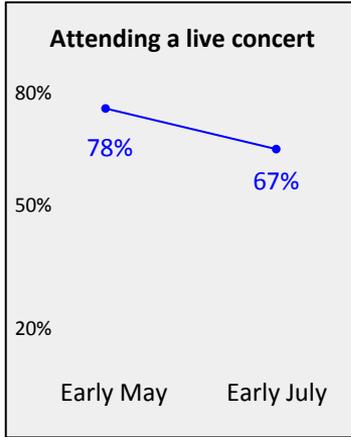
87%



Check employee temperatures each day before entering the building

82%

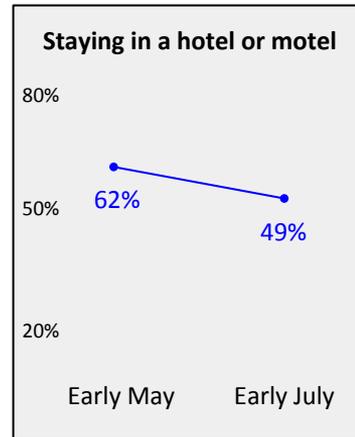
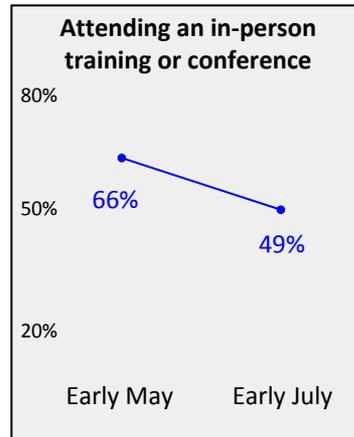
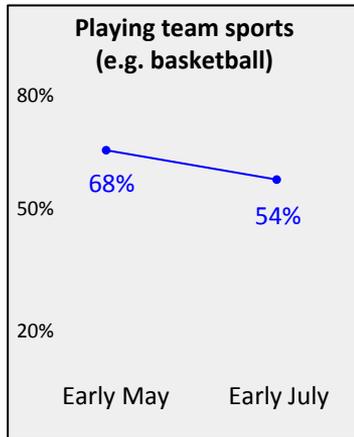
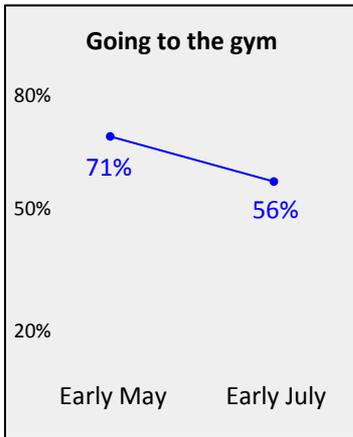
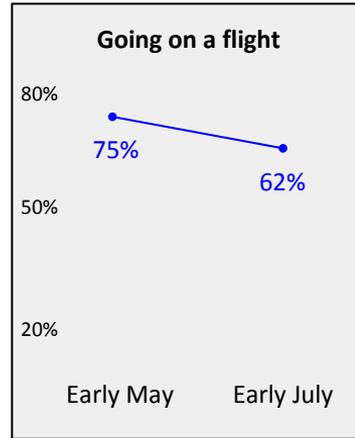
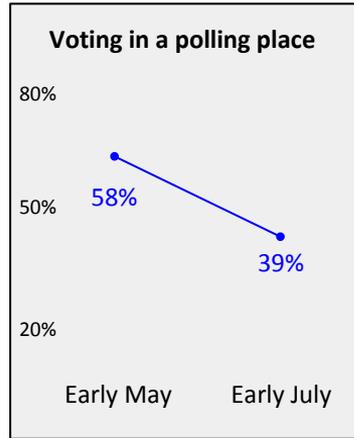
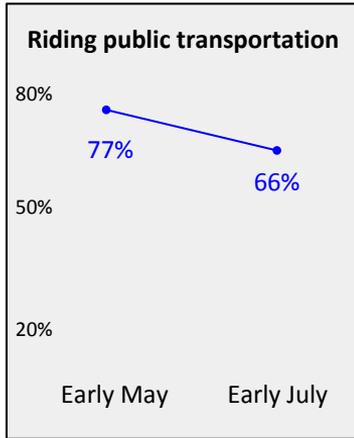
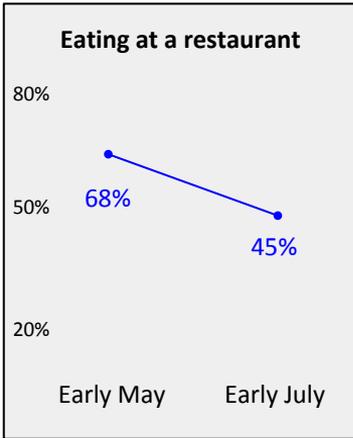
I would feel uncomfortable:



Getting out and about

People in the U.S. are still **most uncomfortable attending concerts and sporting events**, as well as going back to other activities where they must share a physical space, like taking a flight or riding public transportation. They feel **most comfortable shopping**, though more than 30% said they still felt uncomfortable going into a retail store.

I would feel uncomfortable:



Executive Summary

In **July**, we also asked respondents **from around the world** about their experience with remote work. Turns out, employees who have gotten a taste of working from home are in no rush to get back to their old desks. And many employers seem to be playing along.

3 of 5

people who switched from working outside the home to remote work-at-home say they **prefer working from home**

Only

1 of 4

workers **under the age of 55** actually wants to go back to the office

41%

of global respondents who said their companies made changes to remote work policy said they now have the option to work remotely at least some of the time

Of those who are still working from home, many are seeking a form of blended work that allows working in the office and at home; 65% of people who switched to remote work said their company has implemented new remote work policies since COVID-19.

Productivity

38%

of employees say their productivity has risen while working from home, significantly more than in early April; 22% say it's dropped. 40% say it's remained the same

Mental Health

2 of 3

workers say their stress has shot up during COVID-19, barely less than in early April. Almost as many (62%) say their anxiety is up, slightly more than early April

Back to Work Yet?

Of those who have returned to the workplace after working from home,

1 of 3

say they are uncomfortable being back. So why are they back?

Most common answer (34%) was because they're under financial pressure.

And their biggest return-to-work gripe? Other employees not taking COVID-19 seriously

On the Move

43%

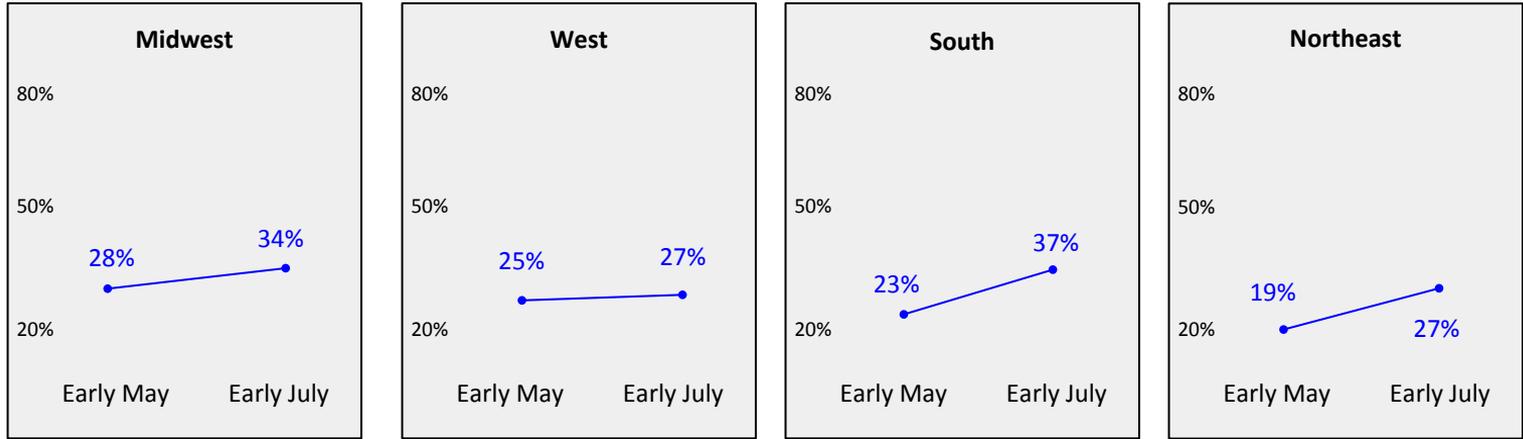
of people whose companies have said they can permanently work remotely have considered moving away from the city or state where they currently live because of changes to remote work policy; 17% have already temporarily relocated during COVID-19 because of the flexibility; and 5% have permanently moved during COVID-19

Return to Work: US Trends

At the beginning of May, we ran a study of more than 2,000 **Americans** and asked people what needed to be true for them to feel confident returning to the workplace. Two months later, **in July**, we ran the same study to see how perceptions **in the U.S.** have changed.

Are you comfortable going back to work?

In May, 24% of people in the U.S. said they would feel comfortable returning to the workplace. That number has since grown to **31% in July**, while 8% were neutral, and the majority (61%) were still uncomfortable.



How comfortable do people feel going to work across the

U.S.?

Though workers in the Midwest were much more likely to feel comfortable returning to the workplace in May than those in the Northeast, **comfort is now generally equivalent across U.S. regions.** Now, those in the South feel most comfortable returning.

Americans are placing increased value on the safety measures their employers can take upon a return to the office

- 93% of people said it was important to them that **social distancing was strongly enforced at work**, 79% said the same at the beginning of May
- 90% of Americans said it was important to them to **limit the number of people in an in-person work meeting**, 88% said the same at the beginning of May
- 87% of Americans said it was important to them that **employees be required to wear masks**, 85% said the same at the beginning of May
 - While feelings about safety measures in the workplace were generally equivalent across all U.S. regions, **a significantly lower percentage in the Midwest (77%) felt mask-wearing was important in July**, while 85% of those in the South, 91% in the West, and 92% in the Northeast said the same
- 82% of people said it was important to them that everyone has their **temperature checked each day before entering the building**, 79% said the same at the beginning of May

Wearing masks across the globe

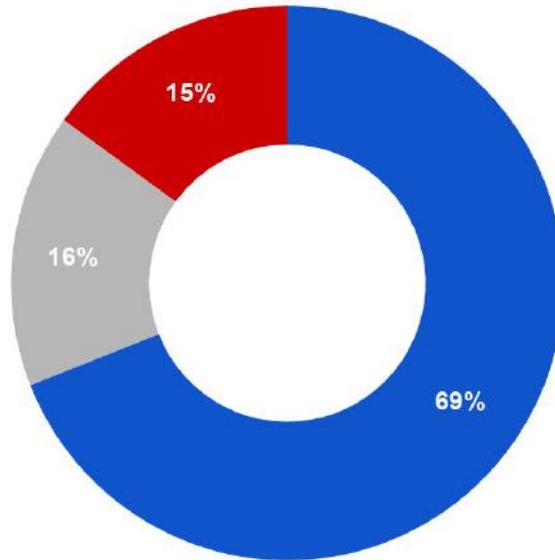
Workers across the globe find it slightly less important than those in the U.S. for employees to wear masks when they return to work. While 87% of U.S. respondents in July said required mask-wearing was important to them, 80% of global respondents said the same. And there was a stark difference in global demographics:



Globally, 82% of men say required mask-wearing in the workplace is important to them, while only 74% of women do

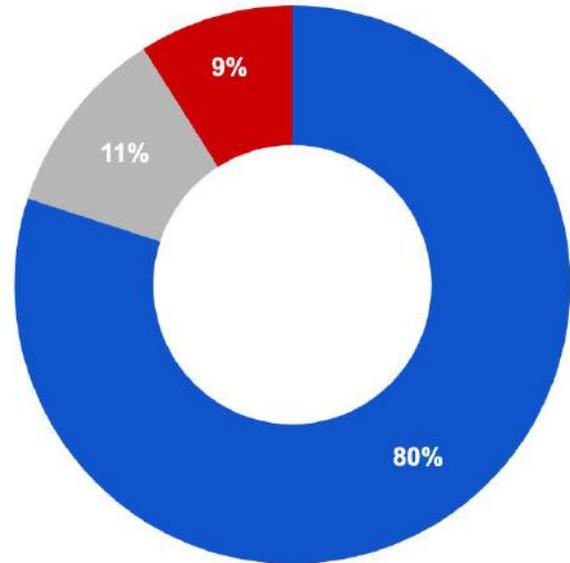
I trust company leadership to make the best decision on when employees should return to work:

Early May 2020



● Agree ● Neutral ● Disagree

July 2020



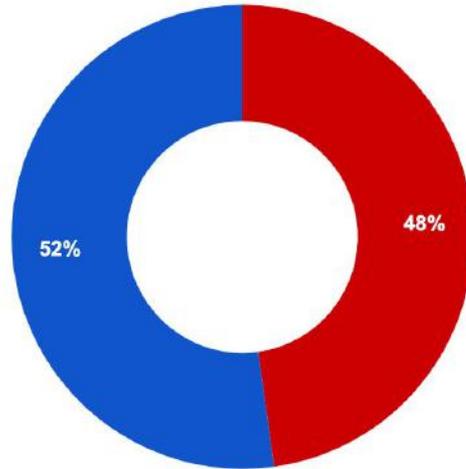
● Agree ● Neutral ● Disagree

Back to Business: US Trends

At the beginning of May, we also asked **Americans** what needed to be true for them to feel confident returning to businesses and other public spaces. Two months later, **in July**, we ran the same study to see how perceptions **in the U.S.** have changed.

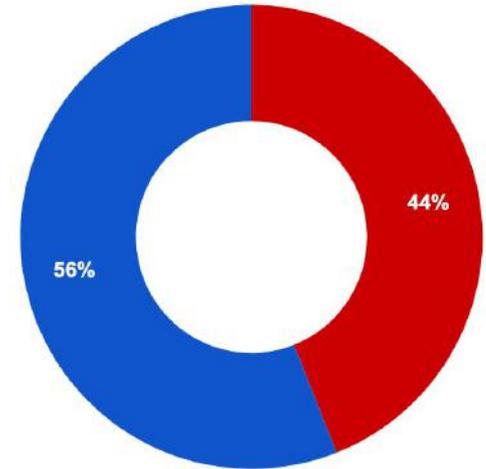
More people think things will return to “normal”

Early May 2020



● No, they will never be the same ● Yes, they will return to how they were beforehand

July 2020



● No, they will never be the same ● Yes, they will return to how they were beforehand

What would need to happen for you to feel comfortable attending a live concert, sporting event, or conference right now?



65% said they would be uncomfortable attending a sporting event



67% said they would be uncomfortable attending a live concert



49% said they would be uncomfortable attending a live conference

In July, these are the top 3 things Americans want to see before they feel comfortable attending a live concert, sporting event or conference are:

- 1. Mandatory mask-wearing for everyone there (2 - May ranking)**
- 2. Social distancing established and enforced (1)**
- 3. Temperature checks done on all people entering the event (4)**

Of those who reported regularly attending sporting events, **20%** said they were unlikely to do so in the foreseeable future, even once regular activities return—compared to 24% in May. Of those who reported regularly attending live concerts, **23%** said they were unlikely to do so in the foreseeable future—compared to 26% in May.

What would need to happen for you to feel comfortable eating at a restaurant right now?



45% said they feel uncomfortable eating at a restaurant

The top 5 things Americans want to see happen before they feel comfortable eating at a restaurant are unchanged since May:

- 1. Tables are separated by a safe distance (1 - May Ranking)**
- 2. Social distancing is established (2)**
- 3. Servers and staff are wearing gloves and masks (3)**
- 4. Temperature checks are done on all people entering the restaurant (4)**
- 5. All seating is outdoors (5)**

Of those who said they regularly ate at restaurants, **13%** said they were unlikely to do so in the foreseeable future, even once regular activities resume—compared to 16% in May.

What would need to happen for you to feel comfortable going on a flight or riding on public transit:



62% said they feel uncomfortable going on a flight



66% said they feel uncomfortable riding public transportation

The top 4 things Americans want to see happen before they feel comfortable going on a flight or riding public transit:

- 1. Masks are mandatory for every passenger (1 - May ranking)**
- 2. Seating is assigned with passengers spaced at least 6 ft apart (2)**
- 3. Temperature checks are done on everyone before they board (3)**
- 4. Boarding and unloading passengers are done in ways that maintain separation (4)**

Of those who said they regularly flew, **16%** said they were unlikely to do so in the foreseeable future, even once regular activities resume—compared to 20% in May.

What would need to happen for you to feel comfortable voting in a polling place?



39% said they would be uncomfortable voting at a polling place

After public health officials say it's safe, the top 3 things people want to see happen before they feel comfortable voting at a polling place are:

- 1. Social distancing is established and can be easily enforced (maintaining 6 feet of distance between people) (2 - May ranking)**
- 2. Masks are mandatory for everyone (1)**
- 3. Booths are sanitized between every voter (3)**

Return to Work: Global Findings

In **July**, we also asked respondents **from around the world** about their experience with remote work, returning to work, relocation, and mental health.

How do people feel about working from home?

- **3 out of 5 people** who switched to remote work at home since the beginning of the coronavirus say they **prefer working from home**
- **Age groups differ in their preferences between working from home or from an office:**
 - **Less than 27% of people under 55 prefer working from an office**
 - Those 65 and older are the only age group where the majority (nearly 48%) prefer to work in the office. In fact, **those 65+ are almost twice as likely (86%) to prefer working from an office than those 34 and under**
- **Marital status also plays a role**
 - 63% of *married* people said they'd prefer to work from home
 - 54% of those who have *never been married* said they'd prefer to work from home
 - 53% of those who have been *divorced* said they'd prefer to work from home
- **Kids had no effect on whether people prefer to work from home**
 - The majority of workers (whether they had young children, older children, or no children at all) preferred to work from home with no statistically significant difference between parents and non-parents

How do people feel about working from home?

- Of those who are still working from home after the switch, **the majority want to permanently switch to a form of blended work that allows working in the office and at home**
 - 32% say they want to *work from home part of the time*
 - 28% say they want to *work from home all the time*
 - 27% would like the option to *work remotely occasionally*
 - 13% want to *work from the office*
- Of those working remotely, **90% said they were equally or more committed to their job** than they were before they made the switch

Remote work and relocation

- 65% of people who switched to remote work said their company has since implemented new and permanent remote work policies since COVID-19. Of those:
 - **41% said they now have the option to permanently *split time between the office and home***
 - 36% said their companies have told employees they can *work from home until the end of the year*
 - 10% said they now have the option to *work from home permanently*
- 43% of people who now have the option to permanently work from home have considered moving away from the city or state where they live because of changes to remote work policy, and **17% have already temporarily relocated during COVID-19**
 - Of those who have relocated, **30% said they would move if they could make their relocation permanent**; 50% said they would maybe move
- Of those who said they considered moving or decided to move
 - 40% said it was because they *wanted to try living somewhere new*
 - 38% said it was to *get closer to family and friends*
 - 37% said it was because of *cost of living*
 - 34% said it was because they *wanted to live in a smaller city or more rural area*

How do people feel about being back in the office?

- Of those who have returned to the workplace after working from home, **more than 1 in 3 (38%) said they are uncomfortable being back in the workplace**
 - **Of those that are back in the office after working remotely**, 48% say they prefer working from home, 33% prefer the office, and 19% are neutral
 - **Of those that are still working from home**, 64% prefer working from home, 25% prefer the office, and 12% are neutral
- Why are those that are uncomfortable back in the workplace? The top 3 reasons are:
 - **34% say it's because they're under financial pressure**
 - **19% say their company really needs them in the workplace**
 - **16% say they're worried they'll be fired if they voice concern**
 - 12% say they're uncomfortable, but not uncomfortable enough to stop going in
 - 7% say it's pressure from colleagues
 - 6% say they're worried they'll get passed up for a promotion if they voice concern
 - 5% say they asked not to return yet, but their request was rejected
 - 1% say there's another reason

Top 4 things that make people most uncomfortable to be back in the workplace:



Other employees not taking COVID-19 seriously

1



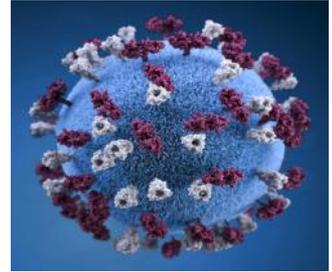
Lack of testing for employees coming back in

2



Employees not wearing masks

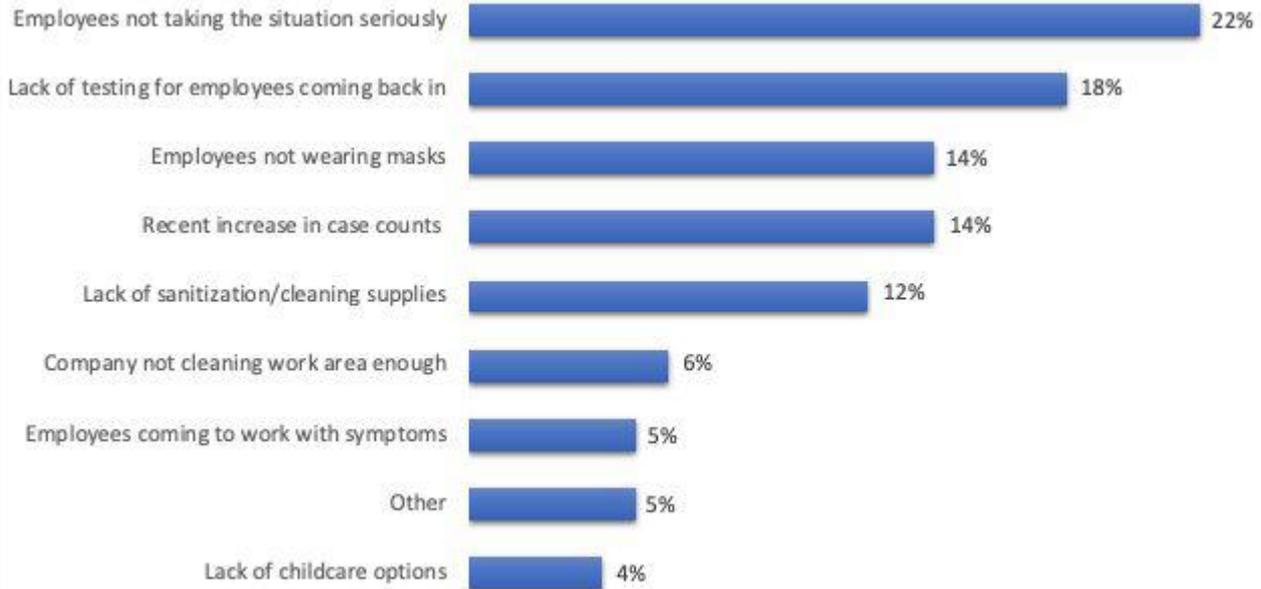
3



A recent rise in COVID-19 cases

4

What makes you most uncomfortable being back at work?



Top 5 things employees say will help them feel more comfortable in the workplace:



Hand sanitizer and cleaning products readily available

1



Employees required to wear masks

2



Testing for all employees

3



No handshakes or hugs policy

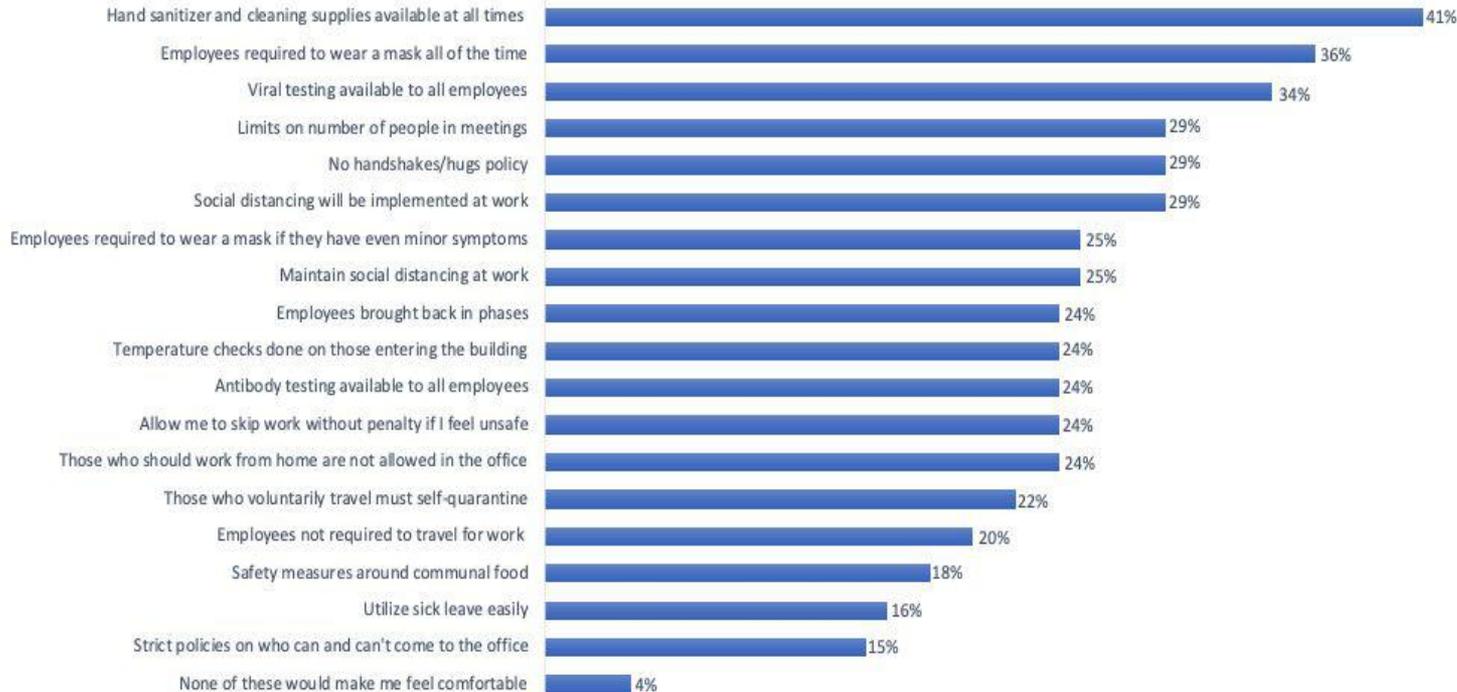
4



Social distancing implemented and enforced

5

What would make you feel more comfortable being back in the workplace?



How do people feel about bringing their kids back to childcare?

- Many parents have seen schools or daycare programs shut down, leaving them with extra responsibility at home. Of those who saw their childcare programs shut down, **61% said their childcare has since reopened**
- Whether or not their childcare program is open, **only 52% of people are comfortable sending their child back to childcare**, with 41% still uncomfortable, and 7% neutral
- Half of people who have children above the age of 18 reported that they had at least one adult child living with them. **Those with adult children who do not live at home are 33% more likely to prefer working in the office than those with adult children living at home**

Mental health during the crisis

- **67% of people say their *stress* level has increased since COVID-19**, mostly because of money worries, uncertainty, job insecurity, and fear of the virus itself. Those who say they're less stressed say it's because of less pressure, more free time, and no more commute
 - 85% of those who are unemployed say their stress levels have increased, while only 66% of employed respondents said the same
 - In a separate mental health Qualtrics study conducted in early April, 66% of respondents said their stress level had increased
- **62% of people say their *anxiety* level has increased since COVID-19**, for much the same reasons reported for stress
 - 79% of those who are unemployed say their anxiety levels have increased, while only 61% of employed respondents said the same
 - In a separate mental health Qualtrics study conducted in early April, 57% of respondents said their anxiety level had increased
- **40% say their *productivity* level hasn't increased or decreased since the pandemic started**, while 38% say it's increased, and 22% say it's decreased
 - People who are unemployed are most likely to say their productivity level has increased (46% say so), but they are also the most likely to say their productivity level has decreased (35% say so). Furloughed workers are the most likely to say their productivity level has neither increased nor decreased (43% say so)
 - In a separate Qualtrics study conducted in early April, 42% of respondents said their productivity level hadn't increased or decreased since the pandemic started; 25% said their productivity level had increased, and 33% say it had decreased

Demographics & Representation

Demographics & Representation

This study was conducted among n=2,003 adults in the United States, United Kingdom, and Australia between June 16 and July 1, 2020.

US Respondents by region:

- South — 35%
- Northeast — 29%
- West — 18%
- Midwest — 18%



Global respondents by gender:

- Female: 40%
- Male: 60%

Note: Responses weighted in analysis to represent a 50/50 split between genders with no statistically significant skews

Global respondents by employment status:

- Working full time: 76%
- Working part time: 15%
- Not working, laid-off or furloughed: 8%