If you torture the data long enough, it will confess.

Ronald Coase
Understanding the survey data

- What is your Agency/Company type?
- What is your current field of work?
- Which country do you currently work in?
- Is your employer-based in a different country other that where you reside?
- Age Range
- Gender
- Marital Status
- Do you currently have children in school?
- Have you been diagnosed with COVID in the past 2 years?
- Are you currently vaccinated?

How people working remotely pre-2020
- Pre 2020 | Did you work remotely?
- Pre 2020 | You worked in a hybrid mode - What % did you work remotely?
- Pre 2020 | You didn’t work remotely - How long was your commute to work?
- Pre 2020 | You didn’t work remotely - How did you commute to work?

How people are working remotely / hybrid now
- Do you have access to high-speed internet from your home?
- What % of your time do you spend in virtual meetings such as Zoom, Teams or Google?
- Do you currently work remotely?
- What % of time do you currently work remotely?
- Do you feel that you work more hours when remote?
- How flexible is your employer in regards to office presence policy?
- What amount of time does your employer expect you to be in the office?
- Regarding the post-pandemic work environment do you perceive that your current salary is...

Are job seeking requiring remote work?
- Did you change jobs in the last 2 years?
- What was the greater motivation for you to change jobs?
- Are you currently looking for a job?
- In your search for a new job, how important is the ability to work remotely?
- Have you turned down a job offer due to not having the ability to work remotely?
- Would you be willing to take a reduction in pay in order to work remotely?
- What % of reduction in pay would you be willing to accept in order to work remotely?

Perspectives on Remote working
- Which work environment do you prefer?
- Do you feel that you can successfully perform your job duties working remotely?
- Do you feel that a company can be successful with a significant amount of employees working 100% remotely?
- How has COVID 19 impacted your thoughts about working full time in the office?
- What do you see as the top 2 disadvantages of remote/hybrid work?
- What other types of benefits would you like to see your employer offer?
Post Pandemic Return to Work.

**Understanding the survey data**

- 1236 respondents
- 90% from the U.S., 10% Europe
- 71% of the employees lie within 20-39 years of age
- 35% consultant, 25% vendor, 35% agency
- 73% of the employees are married
- 65% of the employees have children in school

**Working Now**

- Pre-pandemic, 32% were working remotely, currently 44% of employees are working remotely
- Hybrid has reduced from 51% to 35%
- Pre-pandemic, 17% of people used to go to the office, currently it is 21%
- About 80% of US work in remote/hybrid environment while less than 70% of Europe work in a remote/hybrid environment

**Job Search**

- 40% of employees are willing to take a pay reduction to work remotely
- Of those looking for a job, 74% believe their current salary is at or above the market rate
- 53% of people who have changed jobs in the last two years are again looking for a change

**Perspectives on remote working**

- 82% of employees feel they can successfully work remotely but 44% believe that their organization will not be successful if they continue to work remotely
- 77% of employees having employers in a location different from theirs feel they work more when remote
- Despite knowing that average work time spent increases while working remote, 66% of employees prefer a remote working environment

**Future of Work**

- 75% of employees who previously worked in a hybrid or remote setup and have children in school, want to return to office
- 50% said that Covid had at least some impact on their thoughts to returning to the office full time
- 55% of those in HR and Senior Management believe that employees need to be physically present for the organization to succeed

Note: No significantly different insights related to Country, Age Range, Agency/Company Type, or Field of Work appeared from the results analysis.
Which work environment do you prefer?
Which work environment do you prefer?

- Remotely: 31%
- Work at the office: 32%
- Hybrid: 36%
What % of your time do you spend in Virtual Meetings?
What % of your time do you spend in virtual meetings such as Zoom, Teams or Google?

- Less than 25%: 27%
- 25%- 50%: 55%
- Over 50%: 17%
- Prefer not to answer: 1%
What % did you work remotely?  
N = 1210  
- Yes, full time remote: 51%  
- Hybrid: 32%  
- No: 17%

HYBRID  
What % did you work remotely?  
N = 571  
- Less than 1 day per week: 68  
- 1 day per week: 140  
- 2-4 days per week: 318  
- 5 days per week: 45

ON SITE  
How did you commute to work?  
N = 197  
- Carpool: 9  
- Cycling/walking: 10  
- Public Transit: 29  
- Personal Vehicle: 149

ON SITE  
How long was your commute to work?  
N = 192  
- Less than 30 mins: 87  
- 30 mins to 1 hour: 79  
- 1 hour or more: 26
PRE-COVID AND CURRENT WORK ENVIRONMENT COMPARISON

WAYS OF WORKING

67% of employees still prefer to continue working in a hybrid or remote set up

KEY HIGHLIGHTS

• Pre-pandemic, 32% of employees were working remotely, currently it is 44%
• Pre-pandemic, 17% of people used to go to the office; currently it is 21%
• 82% of employees feel they can successfully work remotely. However, 55% of those in HR and Senior Management believe that employees need to come to the office for the company to be successful
• Married employees who are Consultants, Governmental, Private Agency and Vendor find it relatively difficult to perform their job duties remotely

Pre 2020 | Did you work remotely?
N = 1210
- Yes, full time remote
- Hybrid
- No

Do you currently work remotely?
N = 1194
- Yes, full time remote
- Hybrid
- No

Which work environment do you prefer?
N = 1210
- Yes, full time remote
- Hybrid
- No

What % of time do you currently work remotely?
N = 571
- Less than 1 day per week
- 1 day per week
- 2-4 days per week
- 5 days per week

Even for those in Field Services and Sales, 80% of these employees feel that they can successfully perform their job duties working remotely.
REASON(S) TO CONSIDER CHANGE

INTENT TO LEAVE

42% have turned down a job offer due to not having the ability to work from home

KEY HIGHLIGHTS

- 53% of people who have changed jobs in the last two years are again looking for a new job
- Two factors driving employees to look for another job are higher salary and the ability to work remotely
- Remote working option has become so important that 42% of employees have turned down a job offer for not having the ability to work remotely. 40% of employees are willing to take a pay reduction to work remotely
- 40% would be willing to take a reduction in pay to work remotely

The top factors for changing jobs are either higher salary or the ability to work remotely
INSIGHTS | WORKING NOW

Work / Life Balance

1. 66% of employees who responded feel that they work more hours when remote.

2. Employees who did not work remotely pre-Covid, but prefer to work remotely now, feel that they work more hours when remote.

Do you feel that you work more hours when remote?

- Yes: 66%
- About the same as office & No: 20%
- No: 14%
- Prefer not to answer: 0%

Demographic CART Analysis

The CART analysis has revealed that the main differentiator working more hours when remote is employee’s previous remote work experience, Future Work Environment Preference, Field of work and Company Type.

Variables entered in the model:
- Company type
- Country
- Age range
- Field of work
- Marital status
- Children in School
- Remote work hours

<table>
<thead>
<tr>
<th>About the same as office &amp; No</th>
<th>Yes</th>
<th>Yes %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, Full time remote</td>
<td>60</td>
<td>187</td>
</tr>
<tr>
<td>Remotely, Work from office</td>
<td>58</td>
<td>88</td>
</tr>
<tr>
<td>Hybrid, No</td>
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<td></td>
</tr>
<tr>
<td>Developer, Field Services, HR</td>
<td>20</td>
<td>4</td>
</tr>
<tr>
<td>Project Management, Sales, Senior Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vendor</td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>Consultant, Governmental, Other, Private Agency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company Type</td>
<td>15</td>
<td>18</td>
</tr>
</tbody>
</table>
Qualitative Analysis (Open-ended questions)

**Advantages of remote/hybrid work**

- The biggest advantage employees find is **saving on time by not commuting**
- Their **concentration levels have increased** due to less distraction
  
  “Schedule flexibility. Saving unproductive commute hours”
  “Less distraction and get things done much faster”
  “Improved employee satisfaction better work/life balance”
  “the ability to spend more time with my cat”

**Disadvantages of remote/hybrid work**

- Employees feel that the **gap in communication** has increased
- Employees feel a **lack of coordination** exists among team members
  
  “Inefficiency and poor communication”
  “Lack of teamwork collaboration and face to face dialogue”
  “The network problem is critical”

**Employees’ expectations from their companies**

- Employees feel their companies should provide more **health benefits** like medical insurance, assistance, etc.
- Overtime dues, paid sick leaves are the benefits that employees are looking for (Vacation benefits)
- **Compensation for work from home** including internet expenses, printer, etc.
  
  “Employee mutual medical assistance Health insurance and enterprise annuity”
  “Regular Tours, paid sick leave, annual leave”
  “Cover the expenses for remote working”

**ADVANTAGES**

- Reduction of commute: 24%
- Focused work: 10%
- Work/life balance: 6%
- Cost reduction: 6%
- Talent attraction: 5%
- Flexibility: 4%

**DISADVANTAGES**

- Lack of communication: 31%
- Teamwork: 14%
- Efficiency: 6%
- Internet issues: 6%
- Distractions: 3%

**OTHER BENEFITS**

- Health benefits: 28%
- Vacation benefits: 14%
- Compensation for WFH costs: 6%
- Salary benefits: 5%
- Transportation allowances: 5%
- Work/life balance: 3%
**Virtual Meetings**

1. 72% of employees spend at least 25% of their time in virtual meetings.
2. 69% of Field Services, HR, and Senior Management employees who are less than 40 years old and based out of the United States spend 25% or more of their time in virtual meetings.
3. 77% of Developer, Project Management, and Sales employees who are 20+ years old spend 25% or more of their time in virtual meetings.

**What % of your time do you spend in virtual meetings such as Zoom, Teams or Google?**

<table>
<thead>
<tr>
<th>Less than 25%</th>
<th>25%-50%</th>
<th>Over 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>27%</td>
<td>55%</td>
<td>17%</td>
</tr>
</tbody>
</table>

**Demographic CART Analysis**

The CART analysis has revealed that the main differentiator for future work model preference is employer's expectations of employees to be in office, field of work, current work model and children in school.

**Variables entered in the model:**
- Company type
- Country
- Age range
- Field of work
- Virtual meetings

<table>
<thead>
<tr>
<th>Field of Work</th>
<th>20-29, 30-39, Over 59</th>
<th>40-49, 50-59, Prefer not to answer, Under 20</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>91</td>
<td>153</td>
</tr>
<tr>
<td>Europe, Other</td>
<td>10</td>
<td>3</td>
</tr>
<tr>
<td>Other, vendor</td>
<td>4</td>
<td>17</td>
</tr>
<tr>
<td>Consultant, Governmental, Private Agency</td>
<td>31</td>
<td>17</td>
</tr>
<tr>
<td>Company Type</td>
<td>20-29, 30-39, 40-49, 50-59, Over 59, Prefer not to answer</td>
<td>0</td>
</tr>
<tr>
<td>Project Management, Sales</td>
<td>2</td>
<td>12</td>
</tr>
<tr>
<td>Developer, Other</td>
<td>17</td>
<td>2</td>
</tr>
</tbody>
</table>
Impact of COVID on work from home

1. 64% employees who previously worked hybrid/remotely and have children in school, were impacted to go back to the office.

2. 68% of employees who are married females were impacted to go back to the office.

How has COVID 19 impacted your thoughts about working full time in the office?

- Greatly impacted to NOT go back to office: 29%
- Somewhat impacted to NOT go back to office: 12%
- No impact: 9%
- Somewhat impacted to GO back to office: 23%
- Greatly impacted to GO back to office: 26%

Demographic CART Analysis

The CART analysis has revealed that the main differentiator for Impact on thoughts to work full time in office is field of work, company type, country, previous remote work experience, gender, and children in school.

Demographics entered: Gender, Marital status, Children in school, Company type, Field of work, Country, Previous remote work experience

<table>
<thead>
<tr>
<th>Field of Work</th>
<th>Company Type</th>
<th>Previous Remote Work Experience</th>
<th>Children in School</th>
<th>Impacted to Go back to office</th>
<th>Impacted to NOT go back to office</th>
<th>% Impacted to Go back to office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Services, HR, Project Mgmt, Sales, Senior Mgmt</td>
<td>Other, Private Agency, Vendor</td>
<td>No</td>
<td></td>
<td>144</td>
<td>283</td>
<td>66%</td>
</tr>
<tr>
<td>Consultant, Governmental</td>
<td>Consultant, Governmental</td>
<td>Hybrid, Yes, Full-time Remote</td>
<td>No, Prefer not to answer</td>
<td>51</td>
<td>23</td>
<td>31%</td>
</tr>
<tr>
<td>Field Services, HR, Project Mgmt, Sales</td>
<td>HR, Project Mgmt, Senior Mgmt</td>
<td>No</td>
<td></td>
<td>17</td>
<td>22</td>
<td>56%</td>
</tr>
<tr>
<td>Field Services, HR, Project Mgmt, Sales</td>
<td>HR, Project Mgmt, Senior Mgmt</td>
<td>No</td>
<td></td>
<td>40</td>
<td>16</td>
<td>29%</td>
</tr>
</tbody>
</table>

- Europe: 1% go back, 10% do not go back, 91% impact
- United States: 89% go back, 31% do not go back, 26% impact
- Male: 89% go back, 31% do not go back, 26% impact
- Female: 14% go back, 30% do not go back, 68% impact
- Married: 14% go back, 30% do not go back, 68% impact
- In relationship, Single/Separated: 18% go back, 2% do not go back, 10% impact

INSIGHTS | PERSPECTIVES ON REMOTE WORKING
Conclusions

We see the following changes in behavior regarding the post-pandemic workplace:

- **Increase in remote work**
  - 44% of respondents work remotely at present, compared to 32% prior to the pandemic.

- **People achieve work objectives while working remotely**
  - 82% of respondents feel they can successfully work remotely, achieve business objectives, and fulfill job responsibilities.

- **Senior Management and HR prefer people to work in office**
  - 55% of Senior Management and HR prefer the workforce to be physically present for the organization to succeed.

- **Long work hours do not discourage people from working remotely**
  - 66% of people still prefer remote work over work from office, even with the awareness that average work hours are higher when doing remote work.
Every organization is facing its own set of challenges, but it’s clear to everyone: it’s time to change.

**Hybrid work is here to stay**

44% of respondents work remotely at present, compared to 32% prior to the pandemic.

82% of respondents feel they can successfully work remotely, achieve business objectives, and fulfill job responsibilities.

**There is no one-size-fits all solution**

55% of Senior Management and HR prefer the workforce to be physically present for the organization to succeed.

**The “war” of talent is happening**

40% would be willing to take a reduction in pay to work remotely.

75% of developers prefer a remote/hybrid environment.

**Work-life balance needed**

66% of people still prefer remote work over work from office, even with the awareness that average work hours are higher when doing remote work.
Thank you