GWI

Coronavirus Research | April 2020

Series 7: Work Behaviors

Content

Introduction

As the coronavirus outbreak continues, more and more communities, industries, and businesses are feeling its effects. Staying informed at this time is crucial.

At GlobalWebIndex, we're tracking these effects across different sectors through a focused content series. In this whitepaper, we're releasing our seventh dataset in the series, collected between April 8-14 in the U.S. and UK, dedicated to work behaviors.

In this research we explore how the coronavirus outbreak has changed the way we work. We dig deeper into how equipped businesses are for a fully remote workforce, what challenges and rewards employees are experiencing while working from home, as well as what support they need to boost productivity levels.

How to read these numbers

Please note that all figures in this report refer to workers' self-reported perspective about the situation in their company. Figures referring to specific sectors are also self-reported by workers employed in those sectors.

- The data on page 9-10 is based on **all workers** (those in full-time employment, part-time employment, self-employed/freelancers, put on furlough, or recently laid-off/made redundant).
- The data on page 11-12 is based on **current workers** (those in full-time employment, part-time employment or self-employed/freelancers).
- The remainder of the report is based on workers who report having transitioned to **working from home**/working remotely as a result of the coronavirus outbreak, who represent 46% of the sample (1,745 internet users).

We'll be following this with further releases, exploring the impact of coronavirus on healthcare and other topics still in development.

NOTE: All stats in this report are from a GlobalWebIndex April 2020 custom survey among 2,201 (U.S.) and 1,591 (UK) internet users aged 16-64.

Audience Definitions:

Generations:

- **Gen Z –** 16-23 years-old
- **Gen Y (Millennials) –** 24-37 years-old
- **Gen X –** 38-56 years-old
- **Baby boomers –** 57-64 years-old

Income (based on annual household income):

- **Lower income (U.S.) –** $32,000 or less
- **Higher income (U.S.) –** $85,000 or more

- **Lower income (UK) –** £24,000 or less
- **Higher income (UK) –** £60,000 or more

Seniority:

- **Manager/senior –** Executive Management, Senior Management, Management, Project Manager, Supervisor/Junior Manager/Administrator
- **Junior –** Professional, General staff/support staff

Company size:

- **Emerging Small Business (ESB) –** 10-250 employees
- **Mid-market –** 250-2,000 employees
- **Enterprise –** 2,000- over 5,000 employees

Key Insights

Staff have borne the brunt of company actions mitigating against the coronavirus

- In the UK, the most prominent measure put in place has been to furlough staff (33%), which has resulted in a very small minority of workers in this country being laid off (9%) or asked to take a pay cut (6%).

- In the absence of similar, widespread support from the U.S. federal government at this time, the outbreak has mostly forced employers here to change the working hours for employees (40%) or to freeze hiring (28%). It has also led to a higher proportion of workers being laid off work (15%) or with pay cuts (17%), compared to the UK.

- Compared to the other generations, baby boomers are the most likely to report their company has made the decision to furlough (29%) or make redundancies (17%) for at least some of its staff. Gen X, on the other hand, are four times as likely as boomers to say their employer has asked staff to take a pay cut (16% vs. 4%).

- When it comes to company size, employees at mid-market businesses have been affected the most by the outbreak, with 93% of them having taken some kind of action to mitigate its impact. The data suggests that these companies have been more inclined to take action when it comes to their staff rather than their operations. They're over twice as likely as smaller companies and big enterprises to have asked employees to take pay cuts (29%) and to delay promotions (23%), but at the same time, they're least likely to have cut back on production (17%).

- The measures taken by businesses vary strongly by industry. The industry perhaps most-hit by the outbreak – hospitality and travel – has been over twice as likely as other industries to make staff redundant at this time (37%). Meanwhile, with advertising budgets being tightened in many areas, the marketing and advertising sector is the most likely to have initiated pay cuts (54%).

There's never been a better time for remote working

- Just over half of current employees in the UK and the U.S. report that the company they work for is equipped for a fully remote workforce, with just under a quarter saying it's very well equipped. In fact, it's only 23% who report their company isn't equipped enough, while the remaining 27% have either said they don't know or answered neutrally. It's safe to say that digitalization and technology have been the main facilitators and businesses are better prepared than they would've been a few years ago.

- Millennials are the most likely age group to think that their company is ready for a fully remote working (58%). However, the fact that it's still a third of baby boomers who say the same suggests this isn't just the perception of the digitally natives and it's been a cross-demographic phenomenon.

- Senior employees and management (65%) are much more likely to believe their company is equipped for remote working than junior workers (45%). This could be a result of some companies allowing a higher degree of flexibility for senior staff prior to the outbreak.

- The size of the company and the industry it operates in are perhaps the biggest factors determining the readiness for remote working. Companies having between 250-2,000 employees are best-equipped (67%), while large enterprises with over 2,000 employees are struggling the most (only 29% report being equipped). This is a reflection of the structure and the extent of agility in a business, as well as resources. Enterprises are usually well-established companies, and for some, that means slower adoption of new technology and reliance on more traditional infrastructures.

- By default, those working in office-based industries rate their companies as being most-ready for the situation we're in. Marketing, advertising, PR (92%) and IT/tech (76%) have posted exceptionally high figures here. On the other hand, sectors dependent on staff being on site like retail (22%) and healthcare (32%) lag significantly behind.

Technology isn't enough – education is key for maintaining a fully remote workforce

- The fact that over half of employees currently working from home have received some kind of training or resources to help them with the transition demonstrates just how important clear guidance has been in this process. Although these results have been somewhat skewed by the U.S., with 56% here having a clear structure in place, it's still 40% of those in the UK who report the same.

- Enterprise businesses are again lagging behind smaller and mid-market companies when it comes to initiating a work-from-home policy for their employees. In fact, it's nearly half of those working in large companies who say they don't have any policy or training, compared to only 16% of mid-market and 21% of emerging small businesses. These figures could be influenced by the fact that a large proportion of enterprise businesses operate in the industrial/manufacturing industry (26%), while mid-market companies are most likely technology businesses (23%).

- By sector, it's again the office-based industries (marketing, finance, tech) who are the most likely to have put policies and training in place to prepare their employees for remote working.

Maintaining communication while at home proves the biggest challenge for some groups

- 91% of those working from home have experienced logistical issues, with this being slightly less of a problem in the UK (77%) than the U.S. (92%). The UK is generally more accustomed to working from home as our ongoing Work research shows that it's 27% that are broadly permitted to do so, compared to 22% in the U.S.

- This is also reflected in what the biggest concerns in the two countries are. In the U.S., taking phone calls with other people around (35%) and maintaining security standards (32%) are the biggest worries, while UK workers have more issues with their physical set-up at home (31%).

- The lack of physical set-up, as well as maintaining data protection standards are also what Gen Z are more likely to be concerned about when compared to other generations. Gen X and boomers, on the other hand, are more likely to have issues with accessing files they need and taking phone/video calls with other people around them.

- Income is also a factor here, with lower-earners being much more likely than higher-earners to cite each of the issues we asked about except for having to take phone/video calls with other people around them. In fact, higher-earners are the only demographic group expressing such a big concern with this (53%).

High level of support is key for a productive remote workforce

- U.S. employers are lagging behind in terms of working from home support. They are more likely to want all of the top five most commonly cited types of employer support included in our list – with a 15-percentage-point difference between those yearning for better home office equipment in the U.S. (42%) and UK (27%).

- This is largely driven by the type of work that makes up each market's labor force, and UK workers operating under more flexible remote working practices pre-outbreak. For example, while 12% of the U.S. workers surveyed are part of the industrial or manufacturing sector, this falls to 5% in the UK.

- What's more, of the various sector types we evaluate below, those in the industrial or manufacturing sector are the most likely to want better home equipment (58%) and communication tools (56%). This suggests that logistics are at the heart of dissatisfaction with current working practices across this sector and, consequently, in the U.S. On the other hand, those working in the marketing, advertising, PR (46%) or financial services sector (42%), despite having solid logistical support, are the more likely to want increased flexibility in terms of working hours.

- Along the same lines, the bigger the company, the more likely employees are to require further operational support in terms of home equipment and communication tools – with employees working for enterprises scoring significantly higher for these factors than those employed by smaller businesses.

- Millennials, despite being the most likely to want more company transparency and wellbeing support, are generally the least likely to expect more from their employers. Often imagined as a group of working professionals, their jobs are more likely to fall within the category of jobs best suited to remote working practices.

Although challenging, WFH can be rewarding

- Flexible working hours are what the vast majority (58%) of those working from home enjoy the most at this time. This is by far the biggest benefit identified in both the UK and U.S., and by some distance from the second most popular answer – the added free time if not commuting (47%).

- However, there are still some differences between the two markets. Workers in the U.S. are much more likely than those in the UK to benefit from better eating and sleeping habits (40% vs. 26%); they're more mindful of how they communicate with others (28% vs. 19%); and U.S. workers enjoy collaborating and brainstorming more than their UK counterparts (19% vs 9%).

- There's notable variation by age as well. Gen Z appreciate much more than their older counterparts the improved ability to focus while working from home (33%), while millennials stand out the most for being mindful of their communication with others (37%). Gen X and baby boomers, on the other hand, enjoy their free time, lower stress levels and better habits.

- Males appreciate every aspect of the working from home arrangement more than females, apart from the added free time of not communing (52% vs. 44% for males) and the flexible working hours (59% vs. 57%).

- Junior employees value the flexible hours much more than their managers (63% vs. 49%), which is perhaps a result of this group being generally less likely to take advantage of these practices as part of their usual work routine.

- The data suggests that those in strictly office-based jobs actually value the added free time of not commuting the most. For example, those in the marketing and advertising industry are the only groups that enjoy this more than the flexibility of working from home (86% vs. 56%). However, this could be at the expense of their productivity, since only 9% say their ability to focus has improved, compared to an average of 22%.

- Although it's clear that people appreciate the benefits remote working brings, it's still over 4 in 10 who say once we return to normal, they'd like to work from home less often than they were before the outbreak. This result is highly skewed by the U.S. though, where it's 43% who say this compared to only 28% in the UK. In fact, 35% of UK workers would like to work from home more often when they return to normal working. The low desire for working from home post-outbreak that we're currently seeing could be due to a possible fatigue of having to work remotely until further notice. We expect that once employees return to normal working, these figures will increase and we'll have a more accurate gauge on the subject.

Together, email communication and collaboration tools drive productivity at home

- Collaboration tools are currently the focus of much discussion around remote working practices, and our data shows that many workers (59%) view them as an essential resource for working productively at home. Only 8% say they have made no difference to their home-based work life, and even fewer (2%) say they've been altogether counter-productive.

- Email communication is more important to employees in the U.S. and older workers. Seniority and company size also impact employee attitudes toward this mode of communication: the larger the enterprise, the more essential it's considered to be; whereas the opposite is true of seniority – 62% of managers and seniors regard email communication as fundamental to productivity, compared to 71% of junior employees. The same is true of collaboration tools, with larger enterprises and junior employees taking to them with more enthusiasm.

- With regards to country, collaboration tools follow the same pattern as emails – with U.S. workers placing much higher emphasis on this method as the key to enabling them to do their best. A bigger differentiator for collaboration tools, however, is age; with 77% of Gen Z employees believing they're essential to maintaining good levels of productivity while working remotely, compared to just 53% of Gen X/boomers.

- Both email and collaboration tools are particularly important to those in industrial, manufacturing, tech and IT sectors. In contrast, those in construction and education sectors are significantly less likely to believe they're a fundamental aspect of remote working, which indicates that communication (regardless of mode) is more intrinsic to some jobs than others.

- On the other hand, other industries favor more traditional methods of communication. For example, 94% of those working within the marketing, advertising or PR sector view email communication as essential – which falls to 66% for collaboration tools.

- Collaboration and chat tools are ultimately seen as key to maintaining productivity while working remotely, especially for younger age groups, and are only likely to grow in importance over time. High numbers of workers cite both forms of communication as essential to enabling them to do their best, suggesting that efficiency peaks when the two are used in conjunction with one another.

- Though emails remain at the heart of remote working practices (particularly in some industries), there's clearly a demand among workers for continued investment in this technology. Especially in those sectors and companies where employees are asking for additional support in terms of communication tools, adopting collaboration tools has never been more important.

Coronavirus company actions

% of all workers who say that their company has taken the following actions as a result of the coronavirus outbreak

	All	UK	U.S.	Gen Z	Millennials	Gen X	Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%	%
Change working hours for some or all employees	38	31	40	32	40	39	34	37	32
Freeze hiring	27	20	28	28	31	23	20	22	26
Furlough staff	23	33	20	15	23	23	29	28	21
Cut back on production	21	14	23	32	21	21	13	25	19
Ask staff to take pay cuts	15	6	17	12	18	16	4	5	27
Lay off staff/making staff redundant	14	9	15	12	14	15	17	14	12
Delay promotions/pay raises	14	12	15	14	13	18	8	12	18
Stop or delay paying suppliers	11	6	12	8	14	11	0	12	8
Change the products you sell/produce	8	7	8	8	11	7	3	6	11
Other	8	9	8	5	7	9	14	12	5
None of these	14	26	12	13	11	15	28	16	9

	Male	Female	Manager/ senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
Change working hours for some or all employees	38	38	33	44	34	40	52
Freeze hiring	27	26	28	26	26	31	26
Furlough staff	24	21	21	26	17	23	40
Cut back on production	27	13	20	25	21	17	34
Ask staff to take pay cuts	16	14	23	13	12	29	6
Lay off staff/making staff redundant	15	14	14	14	16	15	11
Delay promotions/pay raises	14	14	17	11	12	23	12
Stop or delay paying suppliers	11	11	11	9	11	14	7
Change the products you sell/produce	9	6	11	6	8	9	7
Other	7	11	6	7	8	6	9
None of these	13	16	13	11	14	7	19

Question: Has your company had to take any of the following actions as a result of the coronavirus outbreak?

Coronavirus company actions by industry

% of all workers who say that their company has taken the following actions as a result of the coronavirus outbreak

	Building/construction	Education /academia	Financial services	Industrial/ manufacturing	IT/tech/software
	%	%	%	%	%
Change working hours for some or all employees	27	44	36	57	44
Freeze hiring	22	28	34	19	46
Furlough staff	27	44	20	34	11
Cut back on production	26	10	13	58	21
Ask staff to take pay cuts	14	8	14	7	29
Lay off staff/making staff redundant	23	11	12	7	10
Delay promotions/pay raises	18	12	18	8	17
Stop or delay paying suppliers	16	13	18	7	10
Change the products you sell/produce	13	11	11	6	6
Other	12	13	2	1	5
None of these	10	11	9	5	9

	Marketing, advertising, PR	Retail	Healthcare	Hospitality, tourism, travel
	%	%	%	%
Change working hours for some or all employees	41	31	40	43
Freeze hiring	20	12	20	24
Furlough staff	3	22	15	32
Cut back on production	10	32	9	23
Ask staff to take pay cuts	54	7	3	10
Lay off staff/making staff redundant	9	10	15	37
Delay promotions/pay raises	10	5	12	11
Stop or delay paying suppliers	10	4	5	8
Change the products you sell/produce	4	8	4	14
Other	2	8	20	6
None of these	3	21	26	5

Question: Has your company had to take any of the following actions as a result of the coronavirus outbreak?

Readiness for remote working

% of current workers who say their company is equipped/not equipped to operate with a fully remote workforce

	All	UK	U.S.	Gen Z	Millennials	Gen X	Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%	%
Not at all equipped	10	15	9	8	8	10	18	10	7
Not very well equipped	13	14	13	7	10	20	10	17	9
Neutral	23	19	23	36	21	18	32	34	12
Pretty well equipped	28	27	28	33	28	28	18	25	41
Very well equipped	23	17	24	12	30	20	15	8	30
I don't know	4	8	3	5	3	4	8	6	1
NET equipped	51	44	52	45	58	48	33	33	71
NET not equipped	23	29	22	15	18	30	28	27	16

	Male	Female	Manager/ senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
Not at all equipped	9	11	9	10	11	6	12
Not very well equipped	16	9	8	19	10	8	33
Neutral	23	22	17	24	25	18	22
Pretty well equipped	27	28	37	23	29	35	15
Very well equipped	22	24	28	22	22	32	14
I don't know	3	6	2	3	3	1	4
NET equipped	49	52	65	45	51	67	29
NET not equipped	25	20	17	29	21	14	45

Question: Many companies may have to operate with completely remote staff for an extended period of time due to the outbreak. How well equipped, if at all, do you feel that your company is to operate with a fully remote staff?

Readiness for remote working by industry

% of current workers who say their company is equipped/not equipped to operate with a fully remote workforce

	Building/construction	Education /academia	Financial services	Industrial/ manufacturing	IT/tech/software
	%	%	%	%	%
Not at all equipped	19	7	9	6	1
Not very well equipped	16	18	11	42	4
Neutral	21	36	11	11	19
Pretty well equipped	30	26	42	33	30
Very well equipped	11	11	27	7	46
I don't know	3	3	0	1	0
NET equipped	41	37	69	40	76
NET not equipped	35	25	20	48	5

	Marketing, advertising, PR	Retail	Healthcare	Hospitality, tourism, travel
	%	%	%	%
Not at all equipped	2	22	19	15
Not very well equipped	2	10	14	18
Neutral	3	40	27	18
Pretty well equipped	32	15	18	29
Very well equipped	60	7	14	18
I don't know	0	6	7	3
NET equipped	92	22	32	47
NET not equipped	4	32	33	33

Question: Many companies may have to operate with completely remote staff for an extended period of time due to the outbreak. How well equipped, if at all, do you feel that your company is to operate with a fully remote staff?

WFH: Training/policy

% working from home who say they had/didn't have the following prior to the outbreak

	All %	UK %	U.S. %	Gen Z %	Millennials %	Gen X/Boomers %	Lower income %	Higher Income %
We have a policy and have received training/resources	54	40	56	74	62	40	45	67
We have a policy, but were never provided training/resources	17	21	17	10	23	14	13	17
No, we had neither a policy nor training/resources	24	30	23	8	11	43	37	15
I don't know	4	10	4	8	4	3	5	1

	Male %	Female %	Manager/senior %	Junior %	ESB %	Mid-market %	Enterprise %
We have a policy and have received training/resources	55	54	65	54	55	66	34
We have a policy, but were never provided training/resources	19	16	17	19	20	16	15
No, we had neither a policy nor training/resources	24	25	14	24	21	16	48
I don't know	3	6	4	3	5	2	3

	Building/construction %	Education/academia %	Financial services %	Industrial/manufacturing %	IT/tech/software %	Marketing, advertising, PR %
We have a policy and have received training/resources	51	42	61	37	79	93
We have a policy, but were never provided training/resources	35	31	23	7	12	4
No, we had neither a policy nor training/resources	6	25	16	55	6	3
I don't know	8	3	0	1	2	1

Question: Prior to the coronavirus outbreak, did your company provide any sort of training, resources, or policy on working from home?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

WFH: Logistical issues

% working from home who say they are experiencing the following logistical issues

	All %	UK %	U.S. %	Gen Z %	Millennials %	Gen X/Boomers %	Lower income %	Higher Income %
Having to take phone calls/video meetings with other people around	34	29	35	25	33	38	21	53
Maintaining security/data protection standards	31	17	32	39	34	25	41	17
Slow/inadequate internet connection	28	21	29	23	29	30	41	17
Accessing the files I need to do my job	27	20	28	18	25	33	32	19
Accessing the tools or software I need to do my job	27	21	27	27	23	30	36	17
Not having the right physical set-up in my home environment	22	31	21	29	26	16	21	18
Getting tech/IT support	19	20	19	14	19	21	23	16
Other	7	6	7	2	6	9	9	4
None of these	9	23	8	6	5	15	9	10

	Male %	Female %	Manager/ senior %	Junior %	ESB %	Mid-market %	Enterprise %
Having to take phone calls/video meetings with other people around	34	35	44	30	28	47	29
Maintaining security/data protection standards	33	26	23	36	30	32	32
Slow/inadequate internet connection	29	27	18	34	23	22	58
Accessing the files I need to do my job	31	21	23	29	22	24	53
Accessing the tools or software I need to do my job	29	23	21	28	23	24	45
Not having the right physical set-up in my home environment	22	23	19	26	20	21	31
Getting tech/IT support	19	20	19	16	17	23	19
Other	5	10	5	5	7	5	7
None of these	8	12	9	8	10	7	10

Question: What logistical issues, if any, are you experiencing while working from home during this time?

WFH: Logistical issues by industry

% working from home who say they are experiencing the following logistical issues

	Building/construction %	Education/ academia %	Financial services %	Industrial/ manufacturing %	IT/tech/ software %	Marketing, advertising, PR %
Having to take phone calls/video meetings with other people around	26	28	42	27	37	72
Maintaining security/data protection standards	35	30	23	29	38	28
Slow/inadequate internet connection	20	35	32	56	22	5
Accessing the files I need to do my job	41	41	23	50	16	10
Accessing the tools or software I need to do my job	36	35	32	45	16	9
Not having the right physical set-up in my home environment	28	16	26	21	33	8
Getting tech/IT support	20	30	22	8	19	5
Other	3	14	3	1	4	1
None of these	6	4	7	10	6	3

Question: What logistical issues, if any, are you experiencing while working from home during this time?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

WFH: Challenges

% working from home who say they are experiencing the following working challenges

	All	UK	U.S.	Gen Z	Millennials	Gen X/Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%
Distractions in my home environment	46	39	46	33	40	55	40	49
Separating work-life from home-life	39	38	39	31	44	35	43	23
Maintaining communication with my coworkers	28	26	28	37	27	27	34	20
A lack of routine/structure	23	34	21	20	21	25	29	23
Maintaining communication with my clients/customers	19	14	20	17	21	18	19	18
Feeling isolated or lonely	18	27	17	21	19	16	22	15
Staying aligned with company goals/strategy	17	13	18	12	23	13	22	11
Childcare duties	16	15	17	5	16	21	26	10
Keeping track of projects/workflow	16	19	16	17	18	14	18	15
Collaborating/brainstorming	15	16	15	22	16	12	12	17
Managing my employees/their performance	14	13	14	13	17	11	9	17
Other	4	4	4	1	4	4	6	3
None of these	5	14	4	1	2	10	5	5

	Male	Female	Manager/senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
Distractions in my home environment	44	47	44	47	38	53	60
Separating work-life from home-life	36	43	27	45	34	36	56
Maintaining communication with my coworkers	33	20	21	32	26	21	49
A lack of routine/structure	21	25	23	22	19	19	40
Maintaining communication with my clients/customers	22	15	19	19	23	16	16
Feeling isolated or lonely	17	20	18	15	18	15	22
Staying aligned with company goals/strategy	18	16	17	18	16	17	25
Childcare duties	16	17	14	16	12	16	35
Keeping track of projects/workflow	16	17	19	13	16	17	15
Collaborating/brainstorming	17	12	18	13	16	14	14
Managing my employees/their performance	15	12	20	10	15	15	9
Other	3	5	3	3	3	3	5
None of these	5	6	4	6	5	5	5

Question: What working challenges, if any, are you experiencing while working from home during this time?

WFH: Challenges by industry

% working from home who say they are experiencing the following working challenges

	Building/construction	Education/ academia	Financial services	Industrial/ manufacturing	IT/tech/ software	Marketing, advertising, PR
	%	%	%	%	%	%
Distractions in my home environment	33	31	35	53	55	83
Separating work-life from home-life	29	30	37	49	42	46
Maintaining communication with my coworkers	28	29	30	43	25	11
A lack of routine/structure	27	30	23	31	17	4
Maintaining communication with my clients/customers	29	26	25	18	17	8
Feeling isolated or lonely	20	21	24	11	15	5
Staying aligned with company goals/strategy	23	32	25	14	17	7
Childcare duties	18	15	14	39	10	3
Keeping track of projects/workflow	26	23	22	9	17	8
Collaborating/brainstorming	21	28	18	8	12	7
Managing my employees/their performance	22	21	23	10	12	4
Other	1	8	2	1	3	0
None of these	1	1	3	11	2	1

Question: What working challenges, if any, are you experiencing while working from home during this time?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

WFH: Support

% working from home who say they want the following support from their employer

	All	UK	U.S.	Gen Z	Millennials	Gen X/Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%
Provide better home office equipment	41	27	42	32	40	44	45	32
Provide better communication tools	36	22	38	47	31	39	50	25
Provide more flexibility in terms of working hours	33	25	34	34	30	36	31	48
Be more transparent about the company's response to the outbreak	33	23	34	31	39	26	30	24
Check in on my/my colleagues' wellbeing more often	32	26	32	25	40	25	20	35
Limit email or messaging communications to normal work hours	22	24	21	22	19	24	18	32
Have more all-hands/town hall-type meetings to update employees	13	14	13	16	15	10	10	15
Other	7	6	7	3	5	10	11	8
None of these	7	22	6	3	4	13	7	7

	Male	Female	Manager/senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
Provide better home office equipment	45	34	35	43	32	43	66
Provide better communication tools	42	27	29	39	34	29	59
Provide more flexibility in terms of working hours	33	33	42	25	25	46	33
Be more transparent about the company's response to the outbreak	34	31	28	36	30	38	33
Check in on my/my colleagues' wellbeing more often	30	34	38	30	32	39	21
Limit email or messaging communications to normal work hours	22	21	29	15	17	29	22
Have more all-hands/town hall-type meetings to update employees	13	13	15	12	13	15	11
Other	4	11	5	5	5	8	11
None of these	5	12	6	7	8	6	7

Question: What do you most want your employer to do in order to support you while working from home?

WFH: Support by industry

% working from home who say they want the following support from their employer

	Building/construction %	Education/ academia %	Financial services %	Industrial/ manufacturing %	IT/tech/ software %	Marketing, advertising, PR %
Provide better home office equipment	44	50	34	58	49	26
Provide better communication tools	43	38	37	56	29	10
Provide more flexibility in terms of working hours	40	34	42	20	37	46
Be more transparent about the company's response to the outbreak	33	24	32	32	42	56
Check in on my/my colleagues' wellbeing more often	28	27	25	16	42	70
Limit email or messaging communications to normal work hours	21	28	25	15	26	19
Have more all-hands/town hall-type meetings to update employees	19	13	31	9	11	6
Other	4	4	4	7	5	2
None of these	0	17	2	0	3	7

Question: What do you most want your employer to do in order to support you while working from home?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

WFH: Benefits

% working from home who say they are experiencing the following benefits

	All	UK	U.S.	Gen Z	Millennials	Gen X/Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%
More flexible working hours	58	55	58	47	62	57	59	42
The added free time of not commuting	47	49	47	37	44	53	37	58
Better eating/sleeping habits	38	26	40	29	31	50	43	44
Less stress in my home environment	32	33	32	27	26	41	27	48
More mindful of how I communicate with others	27	19	28	21	37	18	19	17
Better ability to focus	22	21	22	33	25	16	26	21
Collaborating/brainstorming	18	9	19	20	15	22	12	33
Less distractions in my home environment	16	15	16	16	17	15	16	14
Other	6	4	6	1	4	8	10	2
None of these	3	8	3	2	2	5	5	2

	Male	Female	Manager/ senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
More flexible working hours	57	59	49	63	55	51	80
The added free time of not commuting	44	52	49	47	37	61	52
Better eating/sleeping habits	40	36	40	34	27	46	58
Less stress in my home environment	34	30	42	25	25	40	39
More mindful of how I communicate with others	28	25	22	32	29	26	22
Better ability to focus	24	20	23	20	28	16	16
Collaborating/brainstorming	20	15	28	11	14	30	9
Less distractions in my home environment	17	15	17	14	17	14	20
Other	3	9	4	4	5	6	9
None of these	2	6	3	3	4	3	2

Question: What benefits, if any, are you experiencing while working from home during this time?

WFH: Benefits by industry

% working from home who say they are experiencing the following benefits

	Building/construction	Education/ academia	Financial services	Industrial/ manufacturing	IT/tech/ software	Marketing, advertising, PR
	%	%	%	%	%	%
More flexible working hours	56	66	55	75	58	56
The added free time of not commuting	37	35	43	44	56	86
Better eating/sleeping habits	41	34	32	56	30	40
Less stress in my home environment	32	35	30	30	31	50
More mindful of how I communicate with others	32	28	26	18	40	44
Better ability to focus	29	31	28	11	16	9
Collaborating/brainstorming	22	14	18	8	19	41
Less distractions in my home environment	20	24	23	19	7	7
Other	0	15	4	0	3	1
None of these	0	3	4	3	2	1

Question: What benefits, if any, are you experiencing while working from home during this time?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

WFH: Email communication

% working from home who say email communication has the following effect on their productivity

	All	UK	U.S.	Gen Z	Millennials	Gen X/Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%
Essential to my productivity	67	53	69	63	65	71	67	65
Helpful, but not essential	20	28	19	29	21	15	19	18
It has made no difference	8	12	8	5	8	9	8	9
It's been counter-productive	4	5	4	2	5	3	2	8
I don't use this	1	2	1	1	1	2	4	0

	Male	Female	Manager/ senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
Essential to my productivity	65	71	62	71	62	71	78
Helpful, but not essential	22	16	21	20	25	16	9
It has made no difference	8	9	10	7	9	7	10
It's been counter-productive	5	2	7	2	3	6	3
I don't use this	0	3	1	1	2	0	1

	Building/construction	Education/ academia	Financial services	Industrial/ manufacturing	IT/tech/ software	Marketing, advertising, PR
	%	%	%	%	%	%
Essential to my productivity	45	58	67	71	78	94
Helpful, but not essential	45	20	21	18	10	6
It has made no difference	7	17	6	6	7	0
It's been counter-productive	4	5	6	4	5	1
I don't use this	0	0	0	1	0	0

Question: How would you describe the role of email communication in enabling you to do your best work from home?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

WFH: Collaboration/chat tools

% working from home who say collaboration/chat tools have the following effect on their productivity

	All	UK	U.S.	Gen Z	Millennials	Gen X/Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%
Essential to my productivity	59	39	61	77	59	53	67	47
Helpful, but not essential	27	33	27	18	26	32	17	41
It has made no difference	8	14	8	2	11	7	8	8
It's been counter-productive	2	4	2	0	3	1	2	3
I don't use this	4	10	3	3	2	6	6	2

	Male	Female	Manager/ senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
Essential to my productivity	61	55	48	65	59	55	67
Helpful, but not essential	28	27	37	23	26	35	17
It has made no difference	8	9	9	8	8	7	11
It's been counter-productive	2	2	3	1	2	3	1
I don't use this	2	8	4	3	5	1	4

	Building/construction	Education/ academia	Financial services	Industrial/ manufacturing	IT/tech/ software	Marketing, advertising, PR
	%	%	%	%	%	%
Essential to my productivity	39	29	61	71	75	66
Helpful, but not essential	47	43	26	22	17	31
It has made no difference	11	21	9	4	3	0
It's been counter-productive	2	3	1	3	3	0
I don't use this	1	5	3	1	2	2

Question: How would you describe the role of collaboration/chat tools (e.g. Slack, Google Chat, Microsoft Teams) in enabling you to do your best work from home?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

WFH: Conference tools

% working from home who say conference tools have the following effect on their productivity

	All	UK	U.S.	Gen Z	Millennials	Gen X/Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%
Essential to my productivity	59	34	62	71	61	54	56	62
Helpful, but not essential	24	31	23	21	23	26	24	26
It has made no difference	10	12	9	4	11	11	10	8
It's been counter-productive	2	5	1	1	3	1	2	3
I don't use this	5	18	4	4	3	8	8	2

	Male	Female	Manager/ senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
Essential to my productivity	62	55	56	65	58	63	56
Helpful, but not essential	23	26	28	19	25	25	23
It has made no difference	10	9	10	10	9	9	15
It's been counter-productive	2	2	2	1	2	2	1
I don't use this	2	10	4	5	7	1	5

	Building/construction	Education/ academia	Financial services	Industrial/ manufacturing	IT/tech/ software	Marketing, advertising, PR
	%	%	%	%	%	%
Essential to my productivity	45	29	64	66	79	94
Helpful, but not essential	33	38	25	24	12	4
It has made no difference	18	25	7	8	4	1
It's been counter-productive	2	3	2	1	3	0
I don't use this	1	5	2	2	2	2

Question: How would you describe the role of conference tools (e.g. Zoom, Google Hangouts, GoToMeeting) (e.g. GoToMeeting, in enabling you to do your best work from home?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

WFH: Sources of information

% working from home who say the following sources of information are the most valuable

	All	UK	U.S.	Gen Z	Millennials	Gen X/Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%
Industry press/websites	41	25	43	26	45	41	44	30
Industry newsletters	36	19	38	19	40	36	39	24
Professional networks on social media	35	28	36	26	33	41	27	54
Social media content	32	26	33	34	30	33	31	37
Video content	29	28	30	23	36	24	30	27
Posts by thought leaders	18	15	19	17	20	17	13	15
Blogs	18	12	18	45	16	11	27	13
Webinars	16	15	16	13	18	14	9	19
Podcasts	14	15	14	14	13	14	13	14
Other	5	6	5	5	3	8	7	7
None of these	8	29	5	3	5	12	7	8

	Male	Female	Manager/ senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
Industry press/websites	44	36	30	47	34	39	68
Industry newsletters	37	33	27	42	29	34	62
Professional networks on social media	35	35	52	20	27	55	22
Social media content	31	33	39	24	33	36	20
Video content	30	28	31	24	32	30	20
Posts by thought leaders	19	16	19	17	19	16	21
Blogs	21	12	14	19	24	12	7
Webinars	17	13	21	12	15	19	12
Podcasts	15	12	15	10	17	12	8
Other	4	7	5	3	4	5	7
None of these	6	12	7	9	9	6	8

Question: What sources of industry news, information, etc. do you find most valuable when working from home during a prolonged period?

WFH: Sources of information by industry

% working from home who say the following sources of information are the most valuable

	Building/construction	Education/ academia	Financial services	Industrial/ manufacturing	IT/tech/ software	Marketing, advertising, PR
	%	%	%	%	%	%
Industry press/websites	34	44	36	61	48	49
Industry newsletters	28	39	21	56	39	42
Professional networks on social media	43	31	33	28	37	49
Social media content	40	22	35	27	31	38
Video content	42	23	34	27	32	15
Posts by thought leaders	23	16	21	26	17	11
Blogs	19	20	19	6	14	6
Webinars	18	19	25	6	18	12
Podcasts	19	13	19	3	13	6
Other	4	7	2	1	1	9
None of these	6	11	5	8	4	1

Question: What sources of industry news, information, etc. do you find most valuable when working from home during a prolonged period?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

WFH: Post-outbreak

% working from home who say they want to work from home more/less often once we return to normal working

	All	UK	U.S.	Gen Z	Millennials	Gen X/Boomers	Lower income	Higher Income
	%	%	%	%	%	%	%	%
I want to work from home less often when I return	42	28	43	40	43	41	48	55
I want to work from home about the same amount when I return	31	27	31	43	35	23	26	24
I want to work from home more often when I return	23	35	21	14	19	29	22	17
I don't know	5	10	4	4	3	7	4	4

	Male	Female	Manager/ senior	Junior	ESB	Mid-market	Enterprise
	%	%	%	%	%	%	%
I want to work from home less often when I return	43	39	48	42	37	46	51
I want to work from home about the same amount when I return	30	32	29	34	36	31	14
I want to work from home more often when I return	22	23	18	21	20	20	34
I don't know	4	6	5	4	6	3	2

	Building/construction	Education/ academia	Financial services	Industrial/ manufacturing	IT/tech/ software	Marketing, advertising, PR
	%	%	%	%	%	%
I want to work from home less often when I return	38	55	49	46	45	67
I want to work from home about the same amount when I return	40	27	21	22	37	29
I want to work from home more often when I return	17	14	29	27	16	3
I don't know	5	3	1	6	2	1

Question: Once you have a chance to return to normal working after the outbreak, do you want to work from home more or less often than you typically would have before the outbreak?

Please note there was insufficient sample size to report on working from home figures in Retail, Healthcare/medical services, and Hospitality/tourism/travel industries.

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