Implications of COVID-19 on the Workplace

U.S. REPORT LEVERAGING DATA FROM MORE THAN 5,000 GLOBAL RESPONDENTS
Launched March 2020
5,000+ respondents
Global 25 Countries
18 Sectors

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Source: “Working from Home Experience” Global Survey
Introduction

Globally, the COVID-19 crisis has dramatically impacted the way we work, and at Colliers, we believe this shift will affect not only how we work in the short-term, but will have far-reaching effects on work and the workplace. In this report, we will explore what we can learn from this experience and how it will impact the future of work.

In March of 2020, millions of workers were forced to work from home (WFH) globally. For organizations that had established flexible work practices in place, it was an evolution. However, for many organizations, this new way of working came as a shock and required substantive adjustments to ensure their organizations could continue to function. The greatest piece of learning for many leaders has been the realization that their organization can be productive and stay connected while working remotely. This has forced a new and essential conversation for many organizations as they explore and integrate work processes, work practices and the workplace within their organizations. If people can be effective working from home, then what is the purpose of the office? How can we leverage our real estate and workplace to best support our organizational and cultural goals?

Colliers’ Workplace Advisory team launched the first “Working From Home Experience” global survey in March 2020, engaging more than 5,000 respondents in 25 countries across 18 sectors. The survey measured the respondents’ experience working from home plus the levels of desire to work from home in the future. The core aim of the survey was to collect data to improve the work from home experience and identify potential medium and long-term impacts.

This report consists of the two sections:

1. The expected impacts for the post-COVID-19 office and its functionality.
2. U.S. results focused on the following topics: productivity, management, connection to colleagues, work-life balance, desire and additional insights, including gender differences.

This framework is used throughout the report to provide a greater understanding of working from home today. It will also become important predictive indicators for the future.

The U.S. is still in early days of understanding the full impact of COVID-19 and WFH.

This report provides a snapshot of the key learnings over the past five months. It will be important to monitor the impact of these findings against the state of health, economic and societal forces over time.

The U.S. report has been organized according to these five key topics: productivity, management, connection to colleagues, work-life balance and desire to work from home.

<table>
<thead>
<tr>
<th>COMPONENT</th>
<th>RESULT</th>
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<tbody>
<tr>
<td>PRODUCTIVITY</td>
<td>76% reported same levels or improved productivity due to working from home</td>
</tr>
<tr>
<td>MANAGEMENT</td>
<td>87% stated their managers could effectively manage them virtually</td>
</tr>
<tr>
<td>CONNECTION TO COLLEAGUES</td>
<td>74% felt connected to their team even though not physically together</td>
</tr>
<tr>
<td>WORK-LIFE BALANCE</td>
<td>67% experienced an improvement in work-life balance since working from home</td>
</tr>
<tr>
<td>DESIRE TO WORK FROM HOME</td>
<td>83% wanted to work from home at least one day a week permanently</td>
</tr>
</tbody>
</table>
Key Findings of the Colliers Working from Home Experience Global Survey

Respondents are spread across different regions globally:

(%) RESPONSES BY REGION

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMERICAS</td>
<td></td>
</tr>
<tr>
<td>Canada</td>
<td>13%</td>
</tr>
<tr>
<td>United States</td>
<td>36%</td>
</tr>
<tr>
<td>South America</td>
<td>8%</td>
</tr>
<tr>
<td>EMEA</td>
<td></td>
</tr>
<tr>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>APAC</td>
<td></td>
</tr>
<tr>
<td>6%</td>
<td></td>
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</tbody>
</table>

Respondents have different levels of experience with WFH before COVID-19:

(%) RESPONSES BASED ON EXPERIENCE OF WFH (U.S.)

<table>
<thead>
<tr>
<th>Experience</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>29%</td>
</tr>
<tr>
<td>Occasionally</td>
<td>54%</td>
</tr>
<tr>
<td>Frequently</td>
<td>10%</td>
</tr>
<tr>
<td>Most of the time</td>
<td>7%</td>
</tr>
</tbody>
</table>
The Post-COVID-19 Workplace

Overview

What are the impacts of COVID-19 on work, employees and the future workplace? This section will explore key factors and offer some additional insights and considerations.

While the initial data collected from Colliers’ “Work From Home Experience” global survey showcased many positive findings, we must all keep in mind this is an evolving situation without an end-date at the time of this publication. Over an extended time, no one can be certain that the productivity and satisfaction gains highlighted in our report will be sustained or if new issues will emerge. If the return to the office continues to be postponed, organizations need to pay close attention to isolation, disconnection and cultural deterioration by re-examining work practices and processes.

Our data shows that respondents miss the office as a place to connect and collaborate with their teams. However, 83% of the respondents want to keep WFH post-COVID-19 one day a week or more.

Productivity and work-life balance are the main drivers behind the desire to work from home. This is evidenced by the fact that most respondents indicated their productivity did not change, and even increased, while indicating an improvement in work-life balance.

Our data includes an individual’s desire to work from home and we acknowledge that team and organization perspectives may vary. Also, the growth stage of an organization may impact the number of days employees work from home.
1. Working from Home (WFH)

Working from home is here to stay and yet the workplace has never played such a critical role in supporting culture, connection and collaboration.

By creating a workplace strategy that integrates WFH and the office, an organization can reap the benefits of both.

In a recent hearing from Kate Lister, President of Global Workplace Analytics to the U. S. Senate Committee on Environment and Public Works, she states the U.S. has reached a tipping point for adoption of remote work. Her statements are founded upon 15 years of research, demonstrating an increased demand from employees to work from home. Now that leaders have experienced working from home and have witnessed ongoing productivity, it has dramatically reduced their fears and they are more likely to endorse WFH initiatives post-COVID-19. Today, many are viewing WFH as an organizational and employee benefit and this “shift” in mindset will aid in the formalization and deployment of work from home strategies.

Other benefits cited included: increased productivity, well-being and work-life balance; reduced costs through new workplace strategies that could impact the amount of real estate required; improved disaster preparedness and continuity of operations and reduced greenhouse gases and environmental impact.

ENVIRONMENTAL IMPLICATIONS

In August 2020, a report by Nature Climate Change stated, “The global response to the COVID-19 pandemic has led to a sudden reduction of both greenhouse gas (GHG) emissions and air pollutants.” However, scientists estimate it’s not enough and the reductions in GHG are insufficient to substantially slow warming. While WFH can make an impact, more policies and strategies will be required.

According to Architecture 2030, buildings are responsible for around 40% of global GHG emissions. As such, some additional considerations could include:

- Leveraging WFH strategies that eliminate dedicated desks and provide more hoteling and collaborative options could reduce space requirements and commutes.
- Accommodating employees that cannot WFH at a nearby flex space could avoid long commutes.
- Creating high-performance buildings that leverage locally sourced materials and use renewable energy sources to minimize the energy used to operate the building.

Adopting sustainable strategies will better position employers to attract talent. According to Fast Company, nearly 40% of millennials had chosen a job because of company sustainability. Seventy percent of respondents said they would consider staying with the company longer if the organization has a sustainability plan.

What is good for the planet can also be good for the organization.

LARGER, DIVERSE POOL OF TALENT

Benefits to having a distributed workforce and labor pool includes access to a larger and more diverse number of potential job applicants for organizations. For example, offering remote work could help accommodate applicants that are disabled, in the military or require neurodiversity accommodations. A larger region and therefore a larger talent pool can be targeted if employees do not have to relocate or commute to an office every day. What’s more, employees may accept longer commutes if it’s only for a limited number of days during the week.
Further improving the work from home experience

At the onset of the COVID-19 crisis, more than 95% of U.S. office workers were forced to work from home. Many organizations proved highly resilient in adapting to this new way of working. As we move into the fifth month without confirmation of a vaccination, there are opportunities to further improve the work from home experience.

Moving beyond COVID-19, it’s likely that many organizations will identify opportunities to enhance the productivity and well-being of their employees while WFH. Although 85% of respondents are satisfied about the extent to which their workplace setting at home enables productivity, the home office setup is expected to be further developed and enhanced.

**THE HOME OFFICE SETUP**

Expect the future home workplace setup to go far beyond a second screen. If organizations are supporting WFH, there will be an important role for the employer to ensure that employees have the right ergonomic setup. Organizations may start with a virtual ergonomic assessment and training. A good ergonomic chair and sit-to-stand desk are ranked highly to support the employee while WFH. Many organizations are considering or implementing stipends to support the work from home experience.

**TECHNOLOGY TO OPTIMIZE VIRTUAL INTERACTION**

Data from the survey shows 92% of respondents are satisfied with the extent to which technology allows them to work productively from home. Although this is a remarkably positive finding, technology is expected to further evolve.

A key component of mastering remote work is to identify the right tools to stay productive and connected. With adoption of existing technologies such as Zoom and Microsoft Teams, most organizations have found the transition quite seamless, and a transition that is here to stay in some form post-COVID-19.

Currently, digital communication cannot replicate the richness of face-to-face interactions and a handshake. The inability to effectively show qualities and emotions associated with face-to-face interaction in existing telepresence tools is a significant downside. Emerging virtual communication technologies are aiming to capture an increasingly distributed workforce, not through existing 2D video conferencing screens, but with virtual and augmented reality, 3D holographic images and even work avatars. New virtual communication tools can use virtual reality and augmented reality headsets to allow employees who work in different locations to collaborate. Employees can visualize and interact with 3D images of their work as a group. They can drag and share information in real-time straight from their devices and into a shared holographic space.
Managing Distributed Teams
In the survey, 87% of respondents indicate their manager can lead virtually, which is a very important component and a dramatic increase over the past few years. Our data was collected over a relatively short period of time (two months) and we believe the long-term impact of managing distributed teams will continue to be a critical and competitive area of focus for many organizations to support the shift to distributed work. This new way of working is more about the work and less about where the work gets done. This important shift in mindset, if championed and demonstrated by leaders, will help reduce any barriers between those in the office and those WFH. Measuring results will be key to optimizing individual and team performance and building trust when working remotely.

Managing distributed teams cannot be a one size fits all approach. Different people require different management styles. Some people work most productively when they have autonomy and freedom while other people require more structure to be productive.

Managing the Complexities of Distributed Teams
Managing a distributed team successfully involves developing a culture of trust that work is completed regardless of place or time. This necessitates providing a working infrastructure to employees so they have the right connections and tools, and an appropriate place to work at home. Managing a distributed team calls for greater emphasis on clear roles, expectations and responsibilities that are supported by communication channels.

Enabling Separation Between Work Life and Home Life
More than 46% of respondents miss the office as a way to separate work life and home life. Setting structured work hours and keeping to them, shutting down computers or closing the door to a home office can help.

Many organizations are offering guidance and training for employees to deal with any psychological challenges associated with WFH.
More than five months into the work from home experiment, it is clear this global experience has fundamentally shifted the way we think about work and where we do it. In realizing that, much of what we are experiencing today cannot be taken as a representative example of WFH. For example, in a post-COVID-19 environment, children will be back in school, partner or roommate schedules can be juggled and the anxiety of the virus is likely to relax. However, it’s apparent that many organizations that did not believe in WFH before COVID-19 are now more open to the idea in the future.

There will need to be a balance between WFH and working from an office to meet the needs of both the employee and employer. There is a large difference between the extent to which respondents worked from home before COVID-19 and the desire to work from home after. According to Gallup, 31% of U.S. employees worked remotely one day a week or more before the pandemic. The study also indicated that one-third of these employees would take a pay cut in exchange for the option. Based on our survey data, 83% will want to work one day a week or more from home.

The survey data also shows that respondents need offices to collaborate and connect, which means the office is vital and essential. With the increase of WFH, the functionality and size of the office is expected to change. To achieve the maximum benefits of the workplace, creating a holistic workplace strategy that is supported from the top and integrates HR, IT, real estate/facilities and communications is essential.

**FLEX SPACES OFFER ADDITIONAL FLEXIBILITY**

To garner additional flexibility and also support those that either can’t work from home due to household restrictions or preferences, working in a nearby flex space can offer a solution. This strategy can also support higher levels of decentralization and offers solutions for organizations seeking satellite locations.
The office is not dead. It will become more vibrant and more collaborative than ever.

The COVID-19 “WFH experience” has shown us globally that productivity and connection are not solely dependent on location. This raises a fundamental question, “What is the purpose of the workplace?”

The office as we know it today was designed in the dawn of the industrial revolution to manage and optimize administrative tasks. Work was, where possible, standardized with employees performing single individual tasks at rows of individual desks. The main goals were control and efficiency. Today, most organizations have moved away from pure control and efficiency to focus more on collaboration, knowledge sharing, innovation and trust.

The experiences from COVID-19 are expected to accelerate the transformation of offices to become places that supercharge collaboration and innovation. If focused work is better done at home, we believe the purpose of place will be centered on being together to co-create and innovate.

Many successful innovations and collaborations arise unexpectedly from unplanned interaction between different people. This unexpected connection and intense collaboration are difficult to achieve via Teams, Zoom or Skype. The research data shows that everything that people miss about the office is related to interaction and connection. There still will be opportunities to do individual focused work at the office, to offer people choice, but it’s not expected to be the primary focus of an office going forward.

**FLATTENING THE WORKPLACE OCCUPANCY CURVE TO OPTIMIZE REAL ESTATE**

Increased WFH does not automatically lead to space efficiency or reduction. When working from home is not managed properly, it’s likely that varying peak occupancies will occur on certain days of the week. To spread consistent occupancy over the week, it’s important that employees work in schedules and shifts and follow certain rules of engagement that guide people on how, when and where to work remotely. This involves a behavioral and cultural
change as well. Organizations, teams and individuals should explore structuring and scheduling their weeks more. For example, identify focus WFH days and collaboration office days for the team be together. Workstations can be allocated to teams or individuals and booked on daily or shift basis. There is no one size fits all solution and it’s highly dependent on the type of work and role within the organization.

However, structuring office visits does sound contradictory to creating serendipity. Organizations should find a balance between creating enough buffer space to allow people and teams to be creative and work from the office when they need to, but also managing space efficiency and sustainability. It’s important not to have an oversupply of space when people are working a significant amount of time from home. Make certain to capture and leverage your internal data to ensure a solid capacity management strategy.

**HIGHER QUALITY CORE OFFICES AND MORE ALTERNATIVE WORKPLACES**

If WFH is managed and structured effectively, a reduction of core office space is a possibility due to less work settings being needed. However, it’s expected that organizations will create less dense environments that are well utilized with more collaboration and community spaces and facilities. The actual impact on square footage differs greatly per organization and country.

This is expected to be the end of the anonymous and homogeneous office as there will be a rejuvenated focus on quality space with branding and identity. If employees spend time at the office, they want to experience the brand and identity of the company they work for.

We have seen that not everyone is able to work productively from home. More than 20% of respondents stated that their productivity decreased since WFH, especially those sharing their home office with children or roommates. To overcome these issues, some organizations are starting to explore offering alternative workplaces to their employees to provide easy access to a professional space near their home or better yet, within walking distance. This could include a membership at a flex workspace, collaboration with public libraries or partner and client offices.
1. Nearly half of the respondents indicated they were able to maintain or increase their productivity while working at home. This demonstrates that people are adaptable, resilient and are able to adopt a new way of working.

It is recognized that no definitive conclusions regarding productivity can be defined on a team level. The numbers in this document are based on an individual’s perception of productivity.

2. The largest productivity increase identified was in the technology and media sectors. The highest productivity decrease is identified in the education and research sectors.
3. Most respondents state that the ability to do focused work was much better working at home while collaboration, meetings and social interaction were best facilitated in the office.

![Individual Focused Work Better Facilitated at Home vs. Collaborative Activities Better Facilitated at the Office]

4. Respondents with roommates or children living at home showed the greatest decrease in productivity. Respondents living alone or with a spouse or significant other showed the greatest increase.

5. The data indicated that the older the respondent, the higher their ability to concentrate when WFH.

![Ability to Concentrate by Age, U.S.]

**Productivity**

- Much better at office
- Better at office
- Equal
- Better at home
- Much better at home

**Individual Focused Work Better Facilitated at Home vs. Collaborative Activities Better Facilitated at the Office**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Much better at office</th>
<th>Better at office</th>
<th>Equal</th>
<th>Better at home</th>
<th>Much better at home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual focused work</td>
<td>11%</td>
<td>14%</td>
<td>23%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Collaborative &amp; participate in</td>
<td>22%</td>
<td>34%</td>
<td>36%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>meetings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social interaction with</td>
<td>41%</td>
<td>39%</td>
<td>16%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>colleagues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creative thinking</td>
<td>9%</td>
<td>16%</td>
<td>41%</td>
<td>21%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**Productivity Since COVID-19 [By Living Situation, U.S.]**

- I live alone
- I have children living with me
- It’s me and my spouse / significant other
- I have roommates
- Other

**Ability to Concentrate [By Age, U.S.]**

- Good
- Not changed
- Increased
While there is a slight increase in productivity while working at home, it is important to consider the results are situational, as they reflect an experience during extreme circumstances. Productivity is very difficult to measure for knowledge workers, and we are evaluating it through the lens of personal perceptions and individual experiences. Living situation, home office set-up and the stress of uncertainty are just some of the variables. What we have not been able to define is work effectiveness. While individually we may be efficient, it is important to look beyond that to understand the longer term influence on the success of teams, collaboration, innovation and culture building.

The real opportunity is to rethink work activities that vary in level of complexity and collaboration and define new solutions that integrate both the physical and digital experience.

6. The Americas show higher levels of satisfaction collaborating and concentrating than EMEA and APAC.

Note: Charts illustrate respondents that indicated an eight or higher on a scale of 1-10.

7. 92% of U.S. respondents felt that the technology they used enabled them to work productively from home.

What can we learn from this?

While there is a slight increase in productivity while working at home, it is important to consider the results are situational, as they reflect an experience during extreme circumstances. Productivity is very difficult to measure for knowledge workers, and we are evaluating it through the lens of personal perceptions and individual experiences. Living situation, home office set-up and the stress of uncertainty are just some of the variables. What we have not been able to define is work effectiveness. While individually we may be efficient, it is important to look beyond that to understand the longer term influence on the success of teams, collaboration, innovation and culture building.

The real opportunity is to rethink work activities that vary in level of complexity and collaboration and define new solutions that integrate both the physical and digital experience.
Most respondents (87%) indicated that their manager is able to effectively manage them virtually.
1. By industry, U.S. respondents in the transport & logistics, pharmaceutical and retail industries felt the most positive about their manager’s ability to lead remotely.

What can we learn from this?

Managing remote teams is a new skill for many leaders. Managing by results, keeping the team’s work visible and communicating effectively are just a few of the skills that establish trust and positive team cohesion.

Support from direct managers is even more important when working in distributed teams. This skill is crucial to building, nurturing, and maintaining productive teams and should continue to be developed as it is an essential key to an engaged employee.
Nearly 75% of the respondents felt connected to their teams even though they were not physically together.

1. Seventy-four percent of the respondents still feel connected to their team when working from home. This may be attributed to well-developed relationships, company culture and easy-to-use technology tools that were established before the crisis.

2. Overall, 38% of respondents in the U.S. felt isolated, with individuals aged 21-30 feeling the most isolated. It is important for team leaders to watch for the signs of isolation, which may include reduced engagement or withdrawal from team conversations and activities.
3. Larger companies, likely with more formal policies and procedures, engender more connection among employees working remotely.

Respondents that strongly agreed that they were able to stay connected with colleagues despite not being physically together reported an increase in productivity.

The ability to connect while working from home is inversely correlated with age and generational cohorts that have used technology differently during the crisis. Those aged 21-30 are less likely to turn on their cameras during meetings, while those >50 are most likely to do so. All age groups are having fixed virtual meetings with colleagues each day.

#### COLLABORATION PATTERNS [BY COMPANY SIZE, U.S.]

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Connection Patterns</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; 300 people</td>
<td><img src="chart1.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>101 - 300 people</td>
<td><img src="chart2.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>51 - 100 people</td>
<td><img src="chart3.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>11 - 50 people</td>
<td><img src="chart4.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>1 - 10 people</td>
<td><img src="chart5.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>I am self-employed</td>
<td><img src="chart6.png" alt="Bar Chart" /></td>
</tr>
</tbody>
</table>

#### COLLABORATION PATTERNS [BY AGE, U.S.]

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Connection Patterns</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; 50</td>
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</tr>
<tr>
<td>41-50</td>
<td><img src="chart8.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>31-40</td>
<td><img src="chart9.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>21-30</td>
<td><img src="chart10.png" alt="Bar Chart" /></td>
</tr>
</tbody>
</table>

- I use my camera during most virtual meetings so participants can see me
- I am meeting virtually with my colleagues at fixed times during the day
4. Unsurprisingly, the aspects that are most missed about the physical office are related to human connections and relationships.

Respondents in the U.S. miss in-person collaboration, chance encounters with their co-workers and catching up about non-work events and activities.

Workers also miss the separation of work and home life, as quarantine practices forced us to disconnect from the social activities that previously provided some separation.

What can we learn from this?

Human connection is a critical part of who we are and how we operate in the world. It is required to build trust and to understand the nuances of conversation that are critical to effective collaboration. While team coordination or project updates are easily managed via video chat and email, the more complex, dynamic and creative aspects of collaboration lose steam online, no matter how sophisticated the technology.

Organizations trying to innovate and grow their business must seek innovative solutions such as virtual and augmented realities to support connection.
67% of respondents state their work-life balance has improved since WFH.

Over two-thirds of respondents reported an improvement in work-life balance.
1. For the most part, all ages felt their work-life balance had improved while WFH. Those respondents 21-40 years old showed a higher improvement in work-life balance compared to the >50 age group.

While we have not gathered specific data, anecdotally this may be due to reduced commute time, the ability to set personal schedules, take breaks and exercise.

2. Respondents who work in an enclosed, dedicated room stated their work-life balance was the most improved (71%). Respondents working at their kitchen table reported the least improvement (59%).

What can we learn from this?

Our individual expectations vary dramatically as work-life balance is a complex issue. While lack of childcare, imperfect home office set-up and absent social lives have upset the rhythm of life for many, the mixed results demonstrate a wide variety of expectations or definitions of what work-life balance is. It’s also a good reminder that in this imperfect experiment created by COVID-19, there are many external forces that are impacting our well-being, from the stress of a global pandemic, financial uncertainty and social unrest – all of which may impact our perceptions of our work and life, leaving room for deeper study to determine what the true impact of WFH may be.
1. Eighty-three percent of respondents said they would like to work at home at least one day a week after COVID-19. Most (45%) said they preferred the flexibility of 1 to 2 days a week to work from home.

2. The desire to continue to work from home was directly related to the respondents WFH experience prior to COVID-19. However, 73% of respondents who had no prior experience working from home stated a desire to continue working remotely at least one day a week post-COVID-19.
3. Globally, the strongest desire to work from home after COVID-19 is in the pharmaceutical, technology and education and research sectors. The lowest desire is in the retail, legal and transport and logistics sectors. But even in these sectors, more than 70% of the respondents would like to work 1 day a week or more from home.

4. Respondents in the Americas and APAC show a stronger desire to work 3 days or more from home compared to respondents in EMEA.

5. Seventy-nine percent of respondents stated they would like to WFH at least one day a week. Respondents in the 21-30 age group preferred fewer days working from home.
6. Respondents that have been working from home “most of the time” prior to COVID-19 desire to continue with >4 days a week post-COVID-19.

What can we learn from this?

There is a correlation between previous experience WFH and the desire to increase the number of days working from home.

Prior to COVID-19, many people desired the option to WFH, either occasionally as needed or on a semi-regular basis. This desire continues post-COVID-19. This experience has demonstrated that people can be effective and efficient working outside of the traditional office, opening the discussion of choice and flexibility in future workplace strategies and programs.
1. Respondents in APAC, the Americas and EMEA had similar levels of experience with WFH before COVID-19.

2. U.S. respondents in the Southern U.S. had the highest level of experience WFH and those respondents in the East had the least experience.
3. Those that have been WFH “most of the time” showed the highest levels of overall satisfaction.

They also reported:
- higher levels of concentration and creativity
- higher rates of interaction with colleagues
- improved work-life balance more so than those with less experience WFH
- lowest levels of isolation from their team

What have we learned?

Throughout this study, those that had developed a more disciplined approach to work (starting at the same time, scheduling fixed times to meet with colleagues and having fixed breaks) had overall more positive responses when WFH. They also felt much less isolated from their teams.

Experience matters, but the skills that are needed to perform successfully while WFH can be learned. For example, respondents who kick off and finish every day with virtual team meetings felt 10% more connected to their team.

Organizations that want to increase their employee’s performance while they are working from home should consider investing in employee and manager remote work assessments, distributed work training and coaching.
Women and men experience working from home differently

Women rate their ability to collaborate, focus and socialize higher when WFH than men. They report higher levels of work-life balance and creative thinking.

Key findings for those that identified as male or female when responding to the survey:

**Women working from home:**
- The female respondents noted a 17% greater ability to focus.
- They reported a 12% higher level of connection to their team than male respondents.
- Women said their productivity was elevated 10% more than what men reported.
- Work-life balance was reported 10% higher by women than men.
- Women rated their managers’ ability to manage them virtually 9% higher than what men reported.

**Men working from home:**
- Men had a 12% higher preference to collaborate with colleagues in the office than women.
- Men are 4% more distracted by children at home than women.
- The desire to separate work-life from home-life was 4% higher for men than for women.

Note: This data should not be construed to assume any gender preference or assumptions.

**ABILITY TO CONCENTRATE (BY GENDER, U.S.)**

<table>
<thead>
<tr>
<th>M</th>
<th>W</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor</td>
<td>Good</td>
</tr>
<tr>
<td>Men</td>
<td>Women</td>
</tr>
</tbody>
</table>
I FEEL CONNECTED TO MY TEAM [BY GENDER, U.S.]

PRODUCTIVITY SINCE COVID-19 [BY GENDER, U.S.]

MY WORK-LIFE BALANCE HAS IMPROVED [BY GENDER, U.S.]

OFFICE VS HOME / MEETINGS [BY GENDER, U.S.]

Additional insights

M = Men
W = Women
What to Do Now

The impact of the past five months has caused us to dramatically rethink our beliefs about work and the workplace. Now is the ideal time to capture your data and insights, form an integrated team, develop plausible scenarios and begin to imagine a new way of working that will provide high-levels of flexibility and position your organization for the future.

Workplace and location decisions are influenced by many factors. The data in this report, and other studies being conducted around the world, have illuminated how virtual work brings many positives. The future, however, is still not clear.

Each organization must weigh their business objectives and people needs alongside the implications of COVID-19 to determine the best options for both the short and long term.
PREPARING THE STEP BY STEP MOVE BACK TO THE OFFICE

Organizations are starting to move back to the office step by step. Interventions in the work environment are required to make the office a safe place that allows for social distancing when such measures are still in place. Most organizations start with leadership discussions to identify the purpose of bringing employees back and a solid strategy.

Preparing your physical workplace for a safe return is critical. Colliers International is currently working with many organizations around the world through the proprietary Back-to-Work Navigator tool to help organizations navigate the path back to work safer and faster.

The Back-to-Work Navigator provides a customized report within 48 hours to ensure the organization is well-prepared for a safe return. This includes a virtual tour and analysis of workplace improvements. The report delivers a comprehensive set of recommendations in five key areas:

• Design (space elements)
• Technology
• Navigation and communication
• Behaviors
• Hygiene and cleaning

Watch our video here.

UNDERSTAND THE IMPACTS OF VIRTUAL WORK ON YOUR WORKPLACE AND LOCATION DECISIONS FOR YOUR UNIQUE SITUATION.

The Dynamic Work Diagnostic uses Colliers’ tested global survey and database to examine the long-term viability of virtual work for a company’s unique workplace and location needs. Using survey data from employees and managers, interviews and focus groups, the study assesses distributed work from eight lenses, which includes productivity, management, work activities, connection, desire and trust.

Labor analytics and portfolio strategies are integrated to provide bespoke recommendations based on company-specific evidence. The transparency and rigor of the process creates alignment and accelerates decisions.

Eight lenses examine the long-term viability of WFH

Recommendations for workplace design changes

Develop the components of the distributed work program

Change management and communication strategy
About the Authors

Keith Perske
Senior Vice President, Workplace Advisory

Keith Perske helps organizations solve existential business problems by a holistic approach to the workplace. Keith leads the Workplace Advisory practice for Colliers in the Americas. His team helps occupiers create environments by crafting experiences for employees that are engaging, productive and healthy, leading to competitive advantage. Keith has developed workplace strategies for public, private and non-profit organizations totaling over 700 million square feet. He co-created the MCRw workplace certification program at CoreNet Global and continues to teach classes. Prior to Colliers, Keith has held workplace leadership roles at Johnson & Johnson, Sun MicroSystems, HOK and a large national bank (now Chase). He is a sought-after speaker (including TEDx, SXSW and leading universities), frequent writer and an award-winning educator on the power of place to make people’s work lives better.

Kate North
Vice President, Workplace Advisory

With more than 25+ years of experience, Kate North has helped organizations create innovative workplaces and adopt new ways of working. Her global expertise includes workplace strategy, transformational change management, distributed work programs and training, research, sustainability, design and leadership. Kate is passionate about leveraging the workplace as a strategic asset and building community. She co-founded the “Workplace Evolutionaries” (WE), a vibrant global community of practice within the International Facility Management Association (IFMA) and continues to serve as the Global Chair of WE and on the IFMA Board of Directors. She has authored two books, published over 40 workplace case studies and speaks at numerous events including DisruptHR, SXSW, RICS’ World Built Environmental Forum and IFMA’s World Workplace.

About the Team

Our global Workplace Advisory team worked closely together to develop, deploy and analyze the findings of Colliers “Work from Home Experience” global survey. We would like to recognize contributing members from the team:

**Americas:** Michelle Cleverdon, Andrew Sarate and Charlotte Timms  
**EMEA:** JanJaap Boogaard, Sven Moller  
**APAC:** Truddy Cheung  
**Canada:** Robyn Baxter, Sarah Bramely and Christine Weber
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