Colliers Canada

Work From Home Survey Results

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Key Learnings

People want choice

What we've learned is people neither want to work exclusively from home nor do they want to work exclusively from the office. Offering flexibility as an employer will be a competitive advantage.

Those between 31-40 years old are the ones more likely to work from home if an employer were to provide a furniture/technology budget.

People miss socializing and their workplace culture. This was the number one thing people miss the most across all age groups and industries. Office space will continue to be a weapon in the war for talent. Space will be the tool to enhance workplace culture and will have a positive impact on retention/recruitment.

Perceived productivity at home versus the office wasn't conclusive as an equal number of people said both. Anecdotally, I strongly believe there's a difference between people's perceived productivity and their actual productivity.

Top concern about returning to work?

Feeling safe they won't get sick was the consistent response. Strangely, very few people were concerned about getting clean and abundant fresh air in their office.

Predictably, 75% of respondents believe COVID-19 will have a material impact on their business, but this was disproportionally so for those from larger companies.

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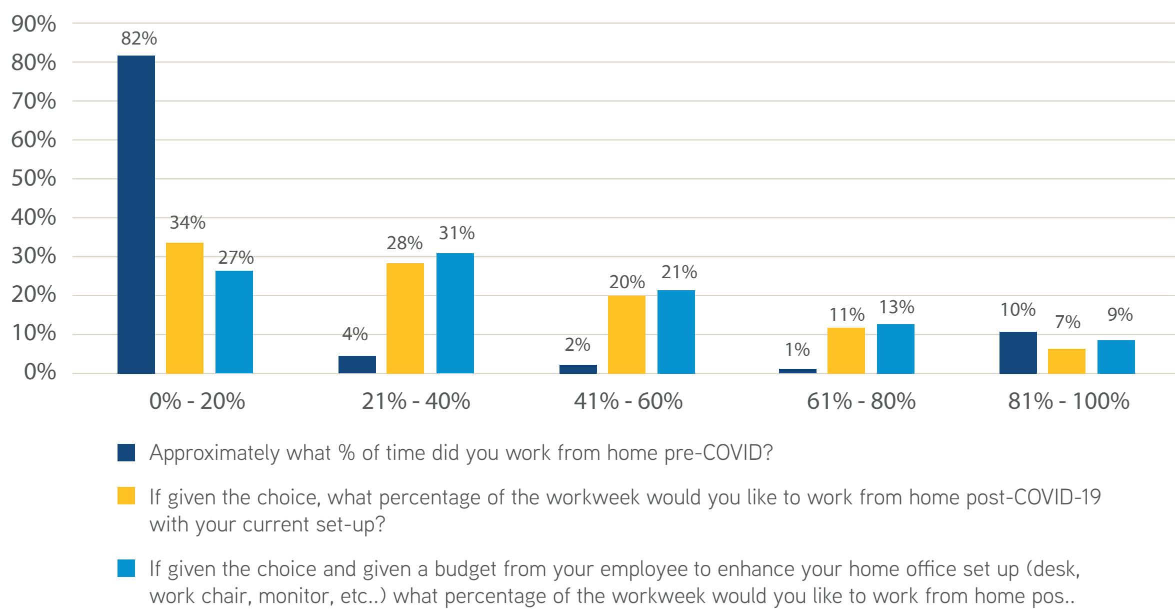
In a recent survey I completed, office workers in Metro Vancouver were asked about their recent work from home experience due to the COVID-19 pandemic, including their pre-COVID work life, their concerns about returning to the office, and their post-COVID preferences in terms of working from home versus the office. I've analyzed the results by employee age and industry to uncover the trends and preferences that will shape post-lockdown office space.

Initial Findings

Survey Initial Findings

The chart below is based on the aggregated preferences across age and industry. Pre-COVID, 82% of employees surveyed worked from home only 0-20% of the time. Given the choice, however, only 34% of them would choose to be in the office that often. That's 48% of the workforce that was unsatisfied at having to be in the office 4-5 days a week. Possibly more surprising is the fact the suggestion of a budget from their employer to enhance their home office set-up did not drastically increase people's desire to work from home; the increase is only 7% more than without a home office budget. It seems clear from these results that the majority of employees value the flexibility of working from home on its own merit.

48%
unsatisfied being in the office 4-5 days a week



Secondly, the percentage of employees who want to work 81-100% from home actually went down slightly, suggesting that for the majority of employees the ideal situation is a flexible work schedule somewhere between where we are now, and where we were prior to the pandemic.

By Age

Work From Home Preferences:

The results of the pre-COVID and post-COVID work from home preferences are largely similar across all age groups. 77-90% of employees were only working from home between 0-20% of the time prior to the pandemic, and only 31-40% would like to return to the same.

Employees aged 31-40 showed the most interest in having a home office budget from their employer, jumping from 31% willing to return to the office full time post-COVID down to only 19% if they had a proper office setup at home.

At the same time, only 4-15% of employees were interested in working from home 81-100% of the time. So what is it about being in the office that adds value to your employees' work life?

31-40%
would like to return
to the same

Age 18 – 30

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	77%	31%	23%
21 - 40%	0%	31%	15%
41 - 60%	15%	23%	23%
61 - 80%	0%	15%	23%
81 - 100%	8%	0%	15%

Age 31 – 40

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	83%	31%	19%
21 - 40%	2%	38%	45%
41 - 60%	0%	19%	19%
61 - 80%	0%	2%	7%
81 - 100%	14%	10%	10%

By Age

Work From Home Preferences:

Age 41 – 50

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	76%	33%	31%
21 - 40%	8%	24%	22%
41 - 60%	4%	24%	25%
61 - 80%	0%	12%	12%
81 - 100%	12%	8%	10%

Age 51 – 60

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	89%	37%	30%
21 - 40%	4%	26%	37%
41 - 60%	0%	19%	19%
61 - 80%	0%	15%	11%
81 - 100%	7%	4%	4%

Age 60+

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	90%	40%	30%
21 - 40%	0%	10%	20%
41 - 60%	10%	10%	10%
61 - 80%	0%	30%	30%
81 - 100%	0%	10%	10%

By Age

Most Missed About Being in the Office:

There was a similar consensus across all age groups about the importance of being able to socialize with their colleagues and their workplace culture, as it was the top ranked attribute across all five groups. Interestingly, the 51-60 age group misses socialization and culture disproportionally more – is it because this demographic has been social distancing more than the younger demographic? Work/life separation was generally ranked second, with the exception of the 41-50 age group, which ranked it third. Surprisingly, only 7-20% of employees said they felt more productive in the office, with responses from the 60+ group the highest.

56%

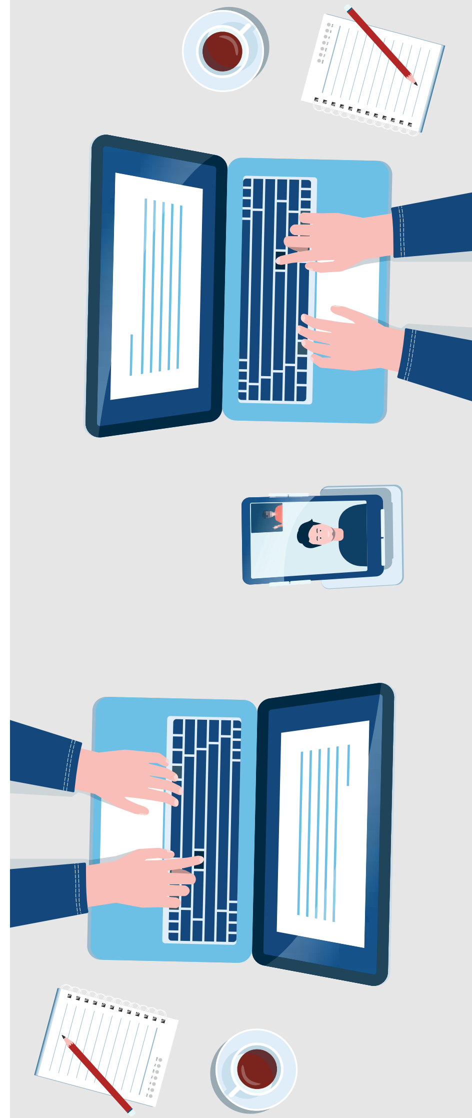
of 51-60 age group misses socialization and culture disproportionally

Age 18 – 30

Culture and socializing with colleagues	38%
Work/life separation	31%
Ability to collaborate with colleagues on projects	15%
Other	8%
I feel more productive working from the office	8%

Ages 31 – 40

Culture and socializing with colleagues	40%
Work/life separation	31%
Ability to collaborate with colleagues on projects	17%
I feel more productive working from the office	12%
Other	0%



By Age

Most Missed About Being in the Office:

Age 41 – 50

Culture and socializing with colleagues	47%
Ability to collaborate with colleagues on projects	22%
Work/life separation	18%
I feel more productive working from the office	12%
Other	2%

Age 51 – 60

Culture and socializing with colleagues	56%
Work/life separation	33%
I feel more productive working from the office	7%
Ability to collaborate with colleagues on projects	4%
Other	0%

Age 60+

Culture and socializing with colleagues	40%
Ability to collaborate with colleagues on projects	30%
I feel more productive working from the office	20%
Work/life separation	10%
Other	0%

By Age

Top Concerns About Returning to Work:

Feeling safe that they won't get sick is in the top 3 concerns for every demographic when thinking about returning to the office. Unsurprisingly, ensuring that they have adequate childcare is one metric that is very clearly dependent on the employee's family situation, and most important for those aged 31-50.

Age 18 – 30

Does my company have a well thought out and articulated back to work strategy	46%
Do I feel safe that I won't get sick	31%
Will my workstation be arranged in such a way to minimize the potential of getting sick	15%
Has the landlord put in place enough preventative measures to minimize getting sick in common spaces (elevators and front doors)	8%
Ensuring I have adequate childcare	0%
Do I feel comfortable my company has adequate cleaning of the office	0%
Confirming we have clean and abundant fresh air in our office	0%

Age 31 – 40

Do I feel safe that I won't get sick	36%
Ensuring I have adequate childcare	26%
Does my company have a well thought out and articulated back to work strategy	21%
Has the landlord put in place enough preventative measures to minimize getting sick in common spaces (elevators and front doors)	10%
Do I feel comfortable my company has adequate cleaning of the office	5%
Will my workstation be arranged in such a way to minimize the potential of getting sick	2%
Confirming we have clean and abundant fresh air in our office	0%

By Age

Top Concerns About Returning to Work:

Age 41 – 50

Do I feel safe that I won't get sick	43%
Does my company have a well thought out and articulated back to work strategy	31%
Ensuring I have adequate childcare	14%
Has the landlord put in place enough preventative measures to minimize getting sick in common spaces (elevators and front doors)	4%
Confirming we have clean and abundant fresh air in our office	4%
Will my workstation be arranged in such a way to minimize the potential of getting sick	2%
Do I feel comfortable my company has adequate cleaning of the office	2%

Age 51 – 60

Do I feel safe that I won't get sick	56%
Does my company have a well thought out and articulated back to work strategy	22%
Has the landlord put in place enough preventative measures to minimize getting sick in common spaces (elevators and front doors)	15%
Do I feel comfortable my company has adequate cleaning of the office	4%
Will my workstation be arranged in such a way to minimize the potential of getting sick	4%
Confirming we have clean and abundant fresh air in our office	0%
Ensuring I have adequate childcare	0%

Age 60+

Does my company have a well thought out and articulated back to work strategy	40%
Do I feel safe that I won't get sick	20%
Confirming we have clean and abundant fresh air in our office	20%
Will my workstation be arranged in such a way to minimize the potential of getting sick	10%
Has the landlord put in place enough preventative measures to minimize getting sick in common spaces (elevators and front doors)	10%
Do I feel comfortable my company has adequate cleaning of the office	0%
Ensuring I have adequate childcare	0%

By Industry

Work From Home Preferences

Every industry surveyed has a significant talent-retention risk if they do not update their work from home plans post-COVID. This should be a wake up call for employers; one strategy to poach top talent is offer them the same salary and benefits with some work from home flexibility between 1-4 days a week, and a significant portion of your workforce could be tempted to make a move.

On the positive side, very few individuals surveyed want to work from home 100%; in fact, many respondents who worked from home that frequently pre-COVID have indicated that they would prefer to be in the office more often.

*Based on the lower number of survey responses for these industries, Other includes the public sector, retail, sales, healthcare, media, education & research, and other.

Real Estate

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	83%	45%	40%
21 - 40%	4%	28%	26%
41 - 60%	2%	15%	17%
61 - 80%	2%	8%	11%
81 - 100%	9%	4%	6%

Legal

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	80%	30%	30%
21 - 40%	5%	20%	20%
41 - 60%	5%	20%	20%
61 - 80%	5%	30%	25%
81 - 100%	5%	0%	5%

By Industry

Work From Home Preferences:

Technology

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	80%	35%	25%
21 - 40%	5%	10%	15%
41 - 60%	5%	25%	25%
61 - 80%	0%	15%	20%
81 - 100%	10%	15%	15%

Professional Services

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	55%	18%	18%
21 - 40%	18%	36%	36%
41 - 60%	0%	18%	18%
61 - 80%	0%	9%	0%
81 - 100%	27%	18%	27%

Financial Services

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	78%	11%	11%
21 - 40%	0%	44%	44%
41 - 60%	0%	22%	22%
61 - 80%	0%	11%	11%
81 - 100%	22%	11%	11%

By Industry

Work From Home Preferences:

Construction

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	89%	14%	0%
21 - 40%	0%	71%	86%
41 - 60%	0%	14%	14%
61 - 80%	0%	0%	0%
81 - 100%	14%	0%	0%

Other

WFH%	Pre-COVID Preference	Post-COVID Preference	Post-COVID with budget for furniture/technology
0 - 20%	96%	30%	13%
21 - 40%	0%	26%	39%
41 - 60%	0%	30%	30%
61 - 80%	0%	4%	9%
81 - 100%	4%	9%	9%

By Industry

Expected Impact to Your Business

75% of respondents believe COVID-19 will have a material impact on their business. Interestingly, respondents from larger companies felt that COVID-19 will have more of an impact than those from smaller companies.

Real Estate

Lack of consumer/B2B confidence	53%
Operations	15%
Change in customer expectations	8%

Top Business Concerns

There's more variation in these responses than any other in the survey, but at the same time most industries still ranked "lack of consumer/B2B confidence" as their top concern. The exception is the Other category, which includes responses from the healthcare and education sectors. In that case, it makes sense that "change in customer expectations" ranks as a higher concern, as those industries have a different relationship to their clients than a typical business.

Technology

Lack of consumer/B2B confidence	50%
Operations	20%
Engaging workforce in strategic priorities	15%

Legal

Lack of consumer/B2B confidence	35%
Operations	15%
Reduced productivity	15%

Financial Services

Lack of consumer/B2B confidence	56%
Organizational resiliency	11%
New strategy creation	11%

Professional Services

Lack of consumer/B2B confidence	64%
Change in customer expectations	18%
Operations	18%

Other

Change in customer expectations	39%
Lack of consumer/B2B confidence	30%
Operations	13%

Construction

Lack of consumer/B2B confidence	57%
New strategy creation	14%
Change in customer expectations	14%

By Industry

Most Missed About Being in the Office:

Across the board, regardless of age or industry, the majority of respondents marked "culture and socializing with colleagues" as the thing they miss most about not being in the office. This shows that workplace culture and socialization can play significant roles in your employee's overall satisfaction, and your talent retention.

Professional Services

Culture and socializing with colleagues	55%
Work/life separation	18%
I feel more productive working from the office	18%
Other	9%
Ability to collaborate with colleagues on projects	0%

Financial Services

Culture and socializing with colleagues	44%
Ability to collaborate with colleagues on projects	33%
Work/life separation	22%
Other	0%
I feel more productive working from the office	0%

Construction

Culture and socializing with colleagues	57%
Ability to collaborate with colleagues on projects	14%
Work/life separation	14%
I feel more productive working from the office	14%
Other	0%

Other

Culture and socializing with colleagues	61%
Work/life separation	22%
Ability to collaborate with colleagues on projects	9%
I feel more productive working from the office	9%
Other	0%

Conclusion

It makes no difference how we slice the data, by age or by industry, there are few groups that want to work from home or in the office 100% of the time; some individuals do, but the majority of workers have stated a clear preference between 21-80% of in-office time, regardless of age or industry. What this means for the future is that your need for office space won't disappear post-lockdown; it just needs to be re-imagined.

Let's chat about how I can help you with this.

Colin Scarlett

Personal Real Estate Corporation | Executive Vice President

+ 1 604 889 8374 | colin.scarlett@colliers.com

About Colliers International Group Inc.

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