



It's time to reimagine where and how work will get done

PwC's US Remote Work Survey - January 12, 2021

Nine months into a monumental shift to work-from-home, business leaders are more convinced about the productivity gains achieved, but some are no closer to giving up the office.

In many companies, determining what to do with the office is the focal point of a much larger discussion. The success of remote work has reimaged how corporate work gets done, as well as where the work takes place. PwC's second survey into attitudes about remote work finds US executives and employees converging around a post-pandemic future with a lot more flexibility, yet few are prepared to completely abandon the office space.

As a result, by design or default, most companies are heading toward a hybrid workplace where a large number of office employees rotate in and out of offices configured for shared spaces. This model embraces the flexibility that most employees (and some employers) crave after working from home for months. It's also a complicated way to organize the work week and is likely to transform a company's culture, employee engagement, the way the work gets done and how office space is used.

Most of the executives and employees we surveyed expect this hybrid workplace reality to begin to take shape in the second quarter of this year. To be sure, the timing will depend on the rollout of vaccines. Some firms might move more quickly as vaccines become more available or slow down if vaccinations occur slower than anticipated. PwC surveyed 133 executives and 1,200 office workers in November and December 2020.

Top findings:

Remote work has been an overwhelming success for both employees and employers. The shift in positive attitudes toward remote work is evident: 83% of employers now say the shift to remote work has been successful for their company, compared to 73% in our [June 2020 survey](#).

The office is here to stay, but its role is set to change. Less than one in five executives say they want to return to the office as it was pre-pandemic. The rest are grappling with how widely to extend remote

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Few executives think company culture will survive a purely remote working set up

To keep a strong culture, employees should be in the office...

About 1-3 days per month
6%

One day per week
5%

Two days per week

Three days per week

Four days per week

15%

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29%

Employees want to return to the office more slowly than employers expect. By July 2021, 75% of executives anticipate that at least half of office employees will be working in the office. In comparison, 61% of employees expect to spend half their time in the office by July.

There's no consensus on the optimal balance of work days at home vs. in the office. Over half of employees (55%) would prefer to be remote at least three days a week once pandemic concerns recede — little changed from the 59% who said the same in June. For their part, while most executives expect options for remote work, they are also worried about the effects: 68% say a typical employee should be in the office at least three days a week to maintain a distinct company culture.

Least experienced workers need the office the most. Respondents with the least amount of professional experience (0-5 years) are more likely to want to be in the office more often. Thirty percent of them prefer being remote no more than one day a week vs. just 20% of all respondents. The least experienced workers are also more likely to feel less productive while working remotely (34% vs. 23%). They're more likely to value meeting with managers or company training programs than their more experienced colleagues.

Real estate portfolios are in transition. Most (87%) executives expect to make changes to their real estate strategy over the next 12 months. These plans include consolidating office space in premier locations and/or opening more satellite locations. Over the next three years, while some executives expect to reduce office space, 56% expect to need more. These mixed findings show that some companies are planning to reinvest the remote work dividend in new ways in order to create a special experience in the office.

Five days per week

21%

Employees don't need to be in the office to maintain company culture
5%

Q: If COVID-19 was not a concern, how often do you think a typical employee needs to be in the office, if at all, in order to maintain a distinctive culture for the company?
Totals do not add up to 100% due to rounding.
Source: PwC US Remote Work Survey
January 12, 2021. Base: 133 US executives

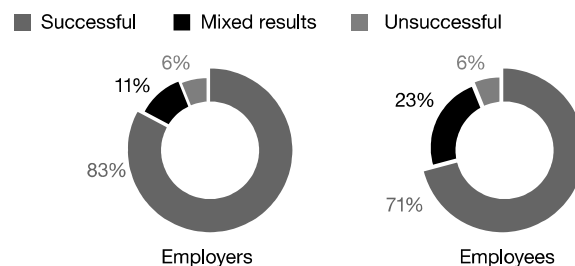
Going back to the office is not an easy call to make

Though almost all companies surveyed expect to be back on their premises and able to support 50% capacity by the end of 2021, much can change. Companies are making their own plans about if and when to go back to the office — and by what proportion. There is no set template.

At the same time, the pandemic is accelerating an outward migration of knowledge workers from New York and California to less-expensive locales. Raleigh, N.C., and Austin, Texas, **the top real estate markets at the start of 2021**, are among the boomtowns attracting more than their share of young workers. Several recent high-profile corporate relocation announcements suggest that some employers are inclined to follow this migration.

Given the trends accelerated by the pandemic, executive leaders need to quickly articulate what their office is meant to accomplish. That clarity will enable them to reimagine how and where their work gets done, how much office space they need and how to support employees to be effective in any work environment.

Remote work has been a success



Q: How successful would you say the shift to remote work because of COVID-19 has been for your company? (Responding 'successful' and 'very successful')
Source: PwC US Remote Work Survey
January 12, 2021. Base: 133 US executives, 1,200 US office workers

Outlook for the office in 2021

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In our latest US Remote Work Survey, PwC surveyed 133 US company executives and 1,200 US office workers between November 24 and December 5, 2020, to see how effective remote work has been. Employee respondents were either required to work from home because of the pandemic or did so routinely anyway. Essential workers were excluded.



Finding 1

Company actions supporting remote work are bearing fruit

Compared with the June survey, more employee respondents say they're more productive now than they were before the pandemic (34% vs. 28%). And more executives agree: over half (52%) say average employee productivity has improved vs. 44% who said the same in June. Also, employees who report higher productivity are much more likely to say their companies have been better at performing various activities, including collaborating on new projects and serving customers.

Remote work productivity is not just a fleeting crisis phenomenon.

Findings from this second survey should help dispel concerns among the skeptics that work-from-home (WFH) is less effective. Instead, this data should draw attention to specific actions companies can take to help their workforce perform effectively in any environment. A majority of employees surveyed say their companies have been successful in finding ways to make WFH more productive. Allowing the flexibility needed to manage family matters is rated highest: 79% of employees say it's been a success.

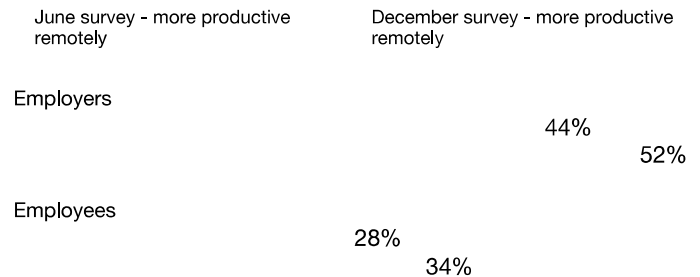
Companies that may have been slow to adopt technologies that support remote work — or to create clear rules and a secure structure around WFH — are playing catch-up. Optimizing the hybrid workplace requires accelerating investments to support virtual collaboration and creativity, as well as for scheduling and safety. Over 60% of executives expect to raise spending on virtual collaboration tools and manager training. Half plan to invest more in areas that support hybrid working models, including hoteling apps (50%) and communal space in the office (48%).

While 81% of executives say their company has been successful in extending benefits for childcare, just 45% of employees say the same.

The biggest gaps in perception between employers and employees on the success of a company's efforts to support remote work relate to childcare and manager training. For example, while 81% of executives say their company has been successful in extending benefits for childcare, just 45% of employees say the same. Of note, women are less likely to say childcare measures have been a success — 41% compared with 49% of male respondents. The rising wave of COVID-19 infections, increased stress and anxiety, and other challenges **are taking their toll on the workforce**. Employees who report lower productivity are more likely to cite difficulties in balancing work with home duties, in addition to challenges collaborating with colleagues or accessing information. Employee sentiment data may help illustrate the problem and give leaders more insight into what employees need.

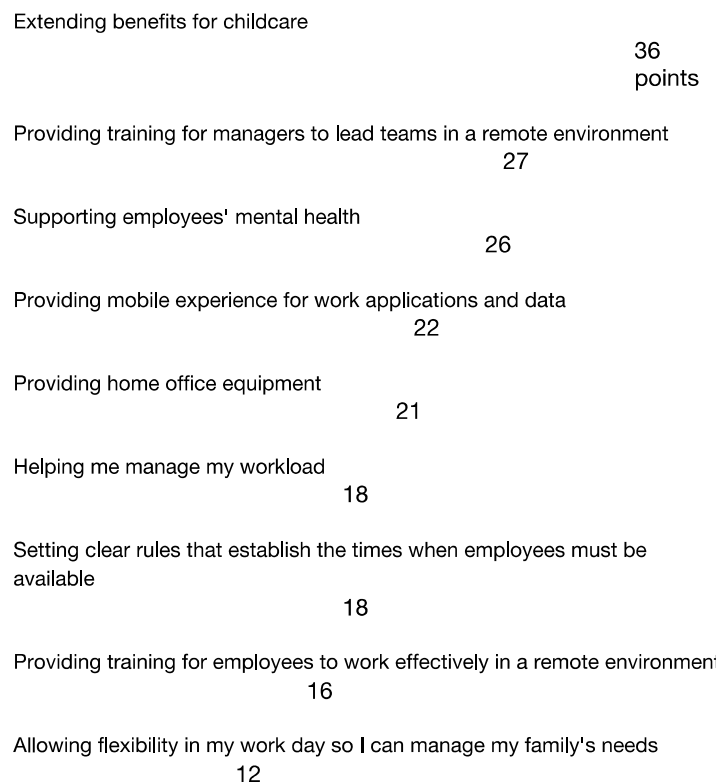
Specific actions companies can take to help their employees perform effectively in any environment include resource scheduling, flexibility and manager training for remote working.

Productivity improved over prolonged work-from-home period



Q: Which of the following best describes your productivity working remotely compared to before COVID-19?
Q: How has average employee productivity changed (compared to pre-COVID-19)? (Responding 'more productive' and 'much more productive')
Source: PwC US Remote Work Survey
June 25, 2020, Base: 118 US executives, 1,200 US office workers
January 12, 2021, Base: 132 US executives, 1,200 US office workers

Gap widest between employees and employers on how well companies support childcare challenges



Q: How would you describe how effective your company has been at performing the following activities with employees working remotely?
(Responding 'successful' and 'very successful'; showing difference: employers minus employees)
Source: PwC US Remote Work Survey
January 12, 2021, Base: 133 US executives, 1,200 US office workers

US executives planning new investment to support hybrid working

% planning increased investment

Tools for virtual collaboration

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- % IT infrastructure to secure virtual connectivity
- % Training for managers to manage a more virtual workforce
- % Conference rooms with enhanced virtual connectivity
- % Hoteling applications
- % Communal space in the office
- % Unassigned (or hoteling) seating in the office
- %

Q: How do you plan to change investment levels, if at all, in the following areas?
Source: PwC US Remote Work Survey
January 12, 2021. Base: 127 US executives



Finding 2

Executives are ready to ramp up return to the office in 2021; employees say not so fast

Executives expect to return to the office faster than employees. By July, 75% of executives anticipate at least half of the office workforce will be back on-site. This compares with 61% of office workers, who expect to return to the office for at least half of their time by July. Employee perceptions of their ability to be productive while remote appear to factor in their thinking about returning to the office. Employees who report decreased productivity when working remotely are more likely to envision being in the office earlier: 55% are already back in the office or say they expect to spend at least half of their time in the office by April 2021, compared with just 36% of respondents who report being more productive during the pandemic. In terms of employee demographics, only age stands out: 25% of the eldest respondents (65 years and older) said they expect to return to the office for at least half of their time by July. At the same time, we found no notable relation by job description or gender with when respondents expect to be back in the office.

Returning to the office won't be simple. The rollout of vaccines is raising confidence in returning to the hybrid office, but uncertainties remain about how to bring employees back safely, as well as how to align workforce scheduling with school reopenings or when to resume business travel. Companies should develop a strategy that helps meet their goals, while also addressing employee safety expectations and the need for increased flexibility. Employees are likely to expect to work in less densely configured spaces and to seek assurances that health checks are being made.

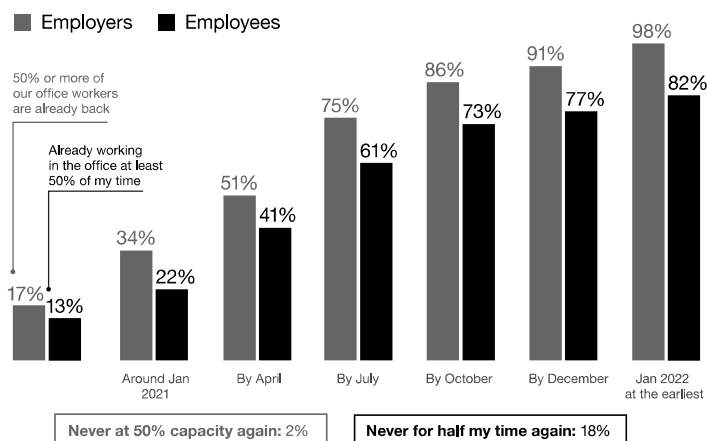
Develop a strategy that helps meet your goals, while also addressing safety expectations and the need for increased flexibility.

The US has estimated that **around 100 million people** will be immunized by the end of the first quarter; however, the first waves of **vaccinations for 2020** appeared to have fallen short of expectations.

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Employees expect the return to the office to take place more slowly



Q: When do you anticipate at least 50% of your office workers will be working in the office?
Q: Around what date do you expect to spend at least 50% of your time in the office?
Source: PwC US Remote Work Survey
January 12, 2021. Base: 133 US executives, 1,085 US office workers



Finding 3

Hybrid workplaces likely to become the norm

Executives still highly value physical offices. Most executives (68%) believe that people should be in the office at least three days a week to maintain a distinctive company culture, once the pandemic is no longer a concern. Moreover, 65% believe the office is “very important” to increasing employee productivity, while over half also consider the office very important for employee collaboration, providing spaces to meet with clients and enabling the company culture.

Set out the purpose of your office

Communicating what people can expect to accomplish in the office is as important as when companies should plan for employees to return. Specify who needs to be in the office and what they can expect to accomplish while there. Go through a **careful evaluation of what happens in the office spaces**. What is valuable enough to keep your people coming in? Will the current configuration satisfy shared expectations to use the office primarily as a meeting place?

Be prepared for changes in the post-pandemic jobs market

Just under one in five executives want to get back on-site as soon as possible; they see the office as critical to their success and company culture. This can be a good strategy for companies (and industries) with a great employment brand, but those who already struggle to attract talent may need to mitigate risks of losing talent who want flexibility to work remotely more frequently.

Manage expanding choices with tools and training

The complexities of a hybrid workplace can be managed with scheduling tools. Employees will need the structure of a set schedule so they can better manage other responsibilities outside the office. And then there's culture: Many executives wonder how their cultures will evolve and how they can sustain the strengths of their cultures when their workforce is split — or how they can work toward **cultural change**. Companies seeking to retain hard-won agility during the crisis should consider how they can continue to foster collaboration among employees and help enhance productivity in any working environment.

Communicate what people can expect to accomplish at home and in the office. What is valuable enough to keep your people coming into the office?

The purpose of an office...

According to employers

- #1 Increasing employee productivity
- #2 Providing a space to meet with clients
- #3 Enabling our employees to collaborate effectively
- #4 Enabling our company culture

According to employees

- #1 Collaborating
- #2 Accessing equipment or documents securely
- #3 Meeting with clients or colleagues
- #4 Training and career development

Q: How important will the following be for the purpose of your physical office in the future?
Q: How important are the following for while you're in the office?
(Responding as 'very important')

Summary of highest ranked choices from a list of 7/11 options.
Source: PwC US Remote Work Survey

January 12, 2021. Base: 133 US executives. Base: 868 US office workers

By design or default, most US companies are heading toward a hybrid office workweek

- It's been great! We're better off giving up on office space entirely %
- No turning back: Many of our office employees will work remotely a significant amount of their time %
- Going with the flow. Business performance is not suffering. We'll likely increase the level of remote work %
- Prefer limited remote schedules but people like it, including future talent %
- Back to the office as soon as feasible. We're at our best on-site and in person %

Q: Which of the following statements best describes how you feel about remote work at your company?
Source: PwC US Remote Work Survey
January 12, 2021. Base: 133 US executives

Finding 4

Employees and employers don't see eye to eye on the optimal schedule for remote work

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Executives and employees are apart on preferred remote schedules for the workweek once the pandemic recedes. Over half of employees (55%) say they'd like to be remote at least three days a week — little changed from the 58% who said the same in June. In contrast, when asked how they feel about remote work at their company, 43% of executives prefer limited schedules or want to be fully back in the office as soon as feasible, while only 24% expect many or all office employees to work remotely for a significant amount of their time.

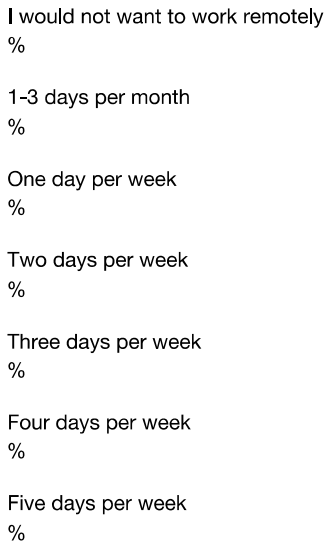
Expect some friction. Employers may be in for a surprise. While employees do show interest in a range of scheduling options for the workweek, they have also been consistent throughout the year in that they expect more remote work in the future. There are minor differences. For example, 34% of younger respondents, aged 18 to 24, are more likely to prefer a remote schedule of one day a week or less, compared to 20% of all respondents.

On the other hand, female respondents are slightly more likely to prefer three or more days of remote work than males: 58% vs. 51%. Be prepared to set new guidelines that outline what's expected, especially for front-line managers who may require training to understand what good coaching and feedback look like in today's hybrid workplace. Over 30% of employees say coaching and onboarding new hires is worse than pre-COVID.

Employers will have to recognize that workforce needs and desires have shifted due to the pandemic. They need to understand the concerns of their employees and work with them to build policies and approaches. The return to work will be effective only when employees are on board. If they're not, companies should be prepared to lose talent.

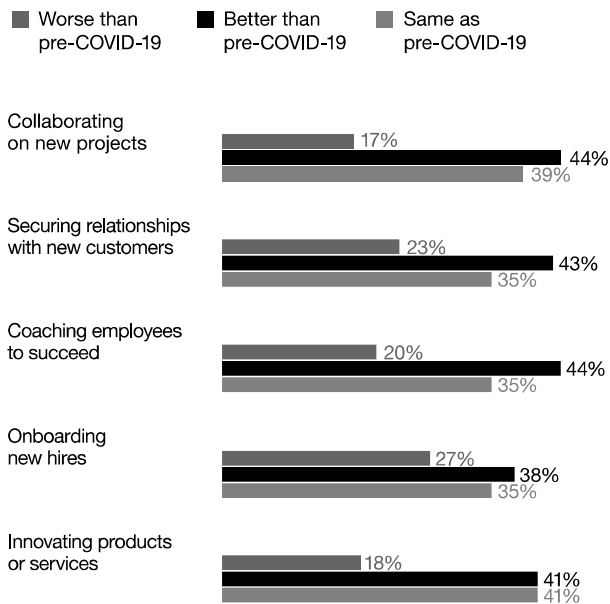
Employees value flexibility. Acknowledge where remote work is more effective and be prepared to balance scheduling accordingly.

Over half of employees want to work remotely three days a week or more



Q: How often would you want to work remotely after COVID-19 is no longer a concern (if your employer allowed you to work remotely as you want to)?
Totals do not add up to 100% due to rounding.
Source: PwC US Remote Work Survey
January 12, 2021. Base: 1,200 US office workers

Employers more likely to say performance improving under remote work



Q: How would you describe how effective your company has been at performing the following activities with employees working remotely?
Totals do not add up to 100% due to rounding.
Source: PwC US Remote Work Survey
January 12, 2021. Base: 133 US executives, 1200 US office workers



Finding 5

While there is some uncertainty around the use of office space, most executives anticipate changes to their real estate strategy in the next 12 months

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Executive Views about the importance of the office plays and company success have not changed since the June survey. Just under a third of executives (31%) anticipate they'll need less total office space in three years,

Real estate strategy in transition as companies anticipate multiple changes

primarily due to increases in the frequency and number of employees working remotely. The other executives surveyed foresee no change (14% in December vs. 19% in June) or an increase in office space needs (56% vs. 51%), primarily due to planned headcount expansion or the need to reduce office density as fears of the virus linger.

Executives are not standing still. Over the next 12 months, 87% of surveyed executives expect to make changes to their real estate strategy, with many planning more than one change. Six in ten expect to consolidate office space into at least one premier business district location, and a similar number say they expect to open more locations.

Hybrid work is driving the office footprint strategy

Executives continue to worry about what might be missed by giving up the office. Findings make clear that companies are actively reviewing portfolios as they invest in making the hybrid workplace effective. As a result, we expect that the drive to align the real estate strategy with the hybrid workplace strategy will pick up speed in 2021, with implications for assumptions on real estate savings as a result of WFH trends.

Real estate portfolios — locations and workplace design — are in transition

These findings suggest that more than a few companies are taking up the opportunity to get creative with the workspace over the next couple of years. The goal is to make visits to the office an experience that enhances relationships and the company culture. Actions are likely to include improvements to office decor and an increase in collaborative hubs, including even bringing back some private offices or quiet spaces in a deliberate move away from cubicles and open floor plans. Companies recognize that some employees need or prefer having a place to go to work as well as a place where they can build relationships.

Consolidate office space in at least one premier business district location
%
Open more locations, such as satellite offices in suburbs
%
Consolidate office space, but outside of major cities
%
We are not making changes to our real estate strategy over the next 12 months
%

Q: What changes are you making to your real estate strategy in the next 12 months?
Source: PwC US Remote Work Survey
January 12, 2021. Base: 128 US executives

Some executives expect to need more office space over the next three years due to rising headcount and social distancing needs

Reduce by more than 25%
%
Reduce between 16 and 25%
%
Reduce between 5 and 15%
%
Stay about the same
%
Increase between 5 and 15%
%
Increase between 16 and 25%
%
Increase more than 25%
%

Q: How do you anticipate your total office space needs will be different three years from now?
Totals do not add up to 100% due to rounding.
Source: PwC US Remote Work Survey
January 12, 2021. Base: 130 US executives

Modeling office space becomes more complicated with hybrid workweeks.

The office demand model is likely to be more complicated after COVID-19

PwC's recent report on **Emerging trends in real estate** showed that a majority of owners, investors and other property specialists believe that — as a result of social distancing needs — office tenants will require more square feet per worker than what was required pre-COVID-19. Space needs will now be dictated by the number of workers who will be in the office each day, how much space will be required to allow them to be productive and still meet any health safety concerns, and whether companies will reduce their existing real estate footprints as they move to more remote work models or use flexible office space to meet fluctuating space needs.

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About the survey

PwC surveyed 133 US executives between November 24 and December 5, 2020. All respondents were from public and private companies in three sectors: **financial services** (43%), **technology, media and telecommunications** (31%), and retail and **consumer products** (26%). Eighty-three percent of respondents are from companies with annual revenues greater than \$US 1 billion. Of the participants, 36% have Chairman, CEO or Executive Director titles, and 18% have Vice President titles.

To understand employee needs, PwC surveyed 1,200 US office workers from a range of industries between November 24 and December 5, 2020. They all identified themselves as employed and previously/currently working remotely — either because they were required to work remotely due to shelter-in-place mandates (64%) or were already working in a flexible arrangement with their employer (36%).



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