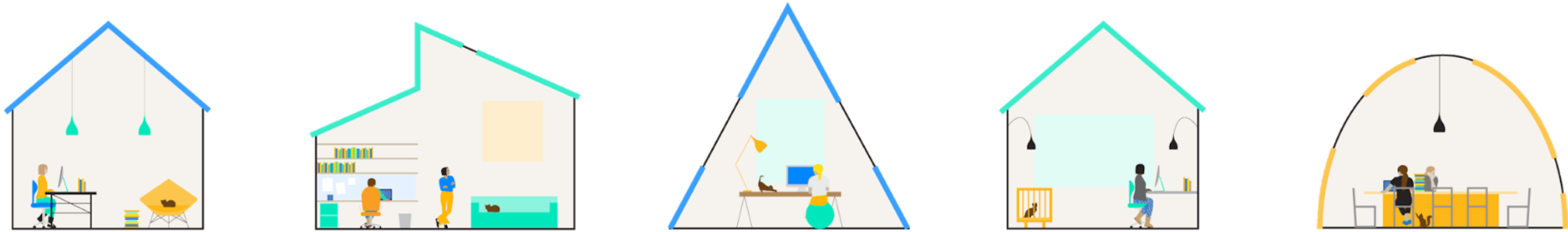


Reworking Work

Understanding The Rise of Work Anywhere

Global research into the impacts of COVID-19 on the nature of work and collaboration.



Foreword

When COVID-19 emerged into our lives, and rapidly changed how we were able to live and work, we had little idea of how hard or long the impact would be. It was obvious that this was an important opportunity to understand more about how people and teams work together.

Atlassian engaged Paper Giant to conduct research with people in Australia, USA, Japan, Germany and France to help us get an insight into how this extraordinary time was being experienced by knowledge workers. We aimed to build an understanding of how people have experienced this time and what the impact has been on their work lives.

The research work has culminated in the creation of clear insights and practical frameworks that will help us better support both Atlassian's and our customers as we continue to move through these challenging times and evolve our way of working both as individuals and teams.

Leisa Reichelt

Head of Research and Insights
Atlassian

Contents

A note from the authors:

This report has been prepared with two key audiences in mind:

Sections in **red** provide findings and insights for those seeking to build stories and narratives out of the research.

The sections in **blue** will be of particular interest to those charged with understanding and responding to the needs of employees.

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Overview of the project intent, approach and findings

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Individual country-level insights for Australia, USA, Japan, France and Germany

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Four categories of change that describe the remote experience

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Executive Summary

We started with an ambitious goal

To understand the **changing work practices of individuals, teams and organisations** in response to the COVID-19 pandemic.

The COVID-19 pandemic forced individuals, teams and organisations around the world to rapidly adapt to new restrictions on work.

To understand what these changes mean, Atlassian engaged Paper Giant to conduct research with knowledge workers in Australia, USA, Japan, Germany and France.

While triggered by COVID-19, the outcomes of this research will allow Atlassian to help other organisations understand their employees' needs and track the evolving nature of knowledge work.

Research questions

In response to COVID-19:

1. What's changed about the ways individuals, teams and organisations work?
2. What's driving differences in experience, or how well people adapt to these changes?
3. What does this mean for how people think about their work futures (hopes, needs and expectations)?

Experiences of 5000 workers in 5 countries

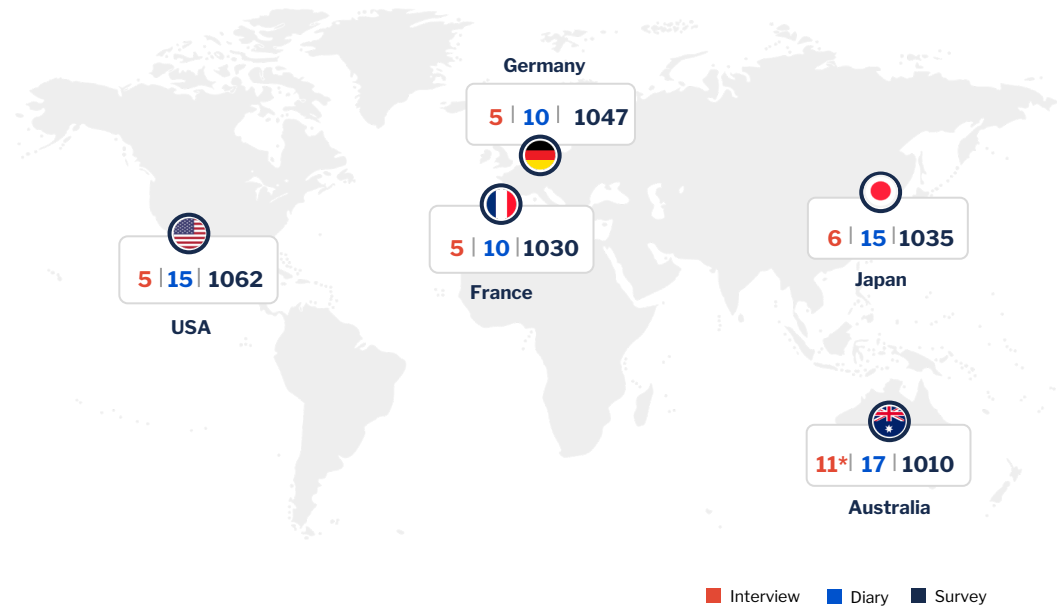
Between April and June 2020, we applied a **mixed method approach** to help us explore the **breadth and depth of change experienced**.

Interviews were held over the course of an hour, exploring workers' prior contexts, their remote experience and their expectations for the future.

Diary studies conducted over two weeks provided rich examples of work frustrations and successes as they happened, and all while participants managed the needs of the home.

Quantitative surveying of over 5,000 workers helped to contextualise and challenge the qualitative findings, while providing baseline measures for future research.

We also partnered with ANZ Bank in Australia to exchange knowledge throughout the project.



People everywhere are ‘Managing More’

The transition to remote work, and the impacts of COVID-19 restrictions, have thrown up **different challenges** for all workers.

In order to remain successful in their capacity as ‘employees’, workers have needed to manage dramatic changes in both their personal and professional lives. These changes have spanned physical, emotional and social domains.

In short, people are **‘Managing More’**.

To answer our research question – what’s changed? – we’ve created the **The Lens Framework**, which describes four categories of change experienced by our participants.



1

How people manage work identities

The line between private and professional selves has blurred, and the ways in which we manage these separate identities has shifted.



3

How people manage work relationships

The ways in which we interact and form connections with our colleagues, and relate to our organisations, has changed.



2

How people manage time

The ways in which we balance home and work demands are changing. Coordinating and aligning is more time consuming. There’s a new autonomy at work, but it’s harder to protect boundaries.



4

How people manage workplaces

Organisations have as many workplaces as they do employees, and support needs and expectations have changed.

Three factors influence people's ability to adapt

To help answer the research question, 'What's driving differences?', we have developed three **'Experience Factors'** that describe how people manage change, and what their needs might be.

The changes described in **The Lens Framework** impacted people in different ways, and to varying degrees.

Understanding the relationship between a person's **household circumstances, role requirements, and broader network connections** provides insight into their experience of work, and what their anticipated needs from an organisation may be.



1

Household complexity

The level of care duties a person has responsibility for, as well as the density of their household, impacts a person's remote working experience.



2

Role complexity

The complexity of an employee's workflow, and the level of social interaction they depend on to be successful in their role, influences their job success and satisfaction.



3

Network quality

A person's access to personal and workplace networks contributes to a person's sense of belongingness and support.

Project overview

Methodology

Our research was designed to provide immediate insight and a repeatable framework for longitudinal insights.

Interviews

We conducted 32* in-depth remote interviews via Zoom. Each interview lasted approximately 60 minutes.

The interviews were designed to explore:

- pre-covid workplace roles and experiences
- most significant changes and challenges from working remotely due to the pandemic
- Hopes for the future within a post-pandemic workplace

Our research also included a number of research sessions where we shared findings of the above topics with our research partners:

- Atlassian
- ANZ

Diary Studies

We conducted five separate Diary Studies over a two-week period. During that time, we recruited 67 participants across the five key geographies.

This study allowed us to get a live snapshot of work life over an extended period of time. This component provided us with:

- Rich examples of the frustrations and successes of remote collaboration as they happened
- Direct insights regarding the tools and software used by participants for remote collaboration
- Deeper reflections on working from home and the effects it had on home life
- Expectations for what the future holds and how that might affect the way they work moving forward

Quantitative Surveys

We surveyed 5,184 knowledge workers who worked remotely during the COVID-19 restrictions across each of the five key geographies.

The 15-minute, multilingual online survey ran from 7 to 27 July 2020. Its primary purpose was to contextualise and challenge some of the key findings that emerged from the qualitative research streams. It covered topics such as:

- Organisational trust
- Work-life balance
- Job satisfaction
- Team cohesion
- Future workplace

It was designed to capture point-in-time measures, remain responsive to the emerging context and enable longitudinal tracking capability beyond this initial study.

*Including 5 staff from participating partner ANZ

Experiences of 5000 workers in 5 countries

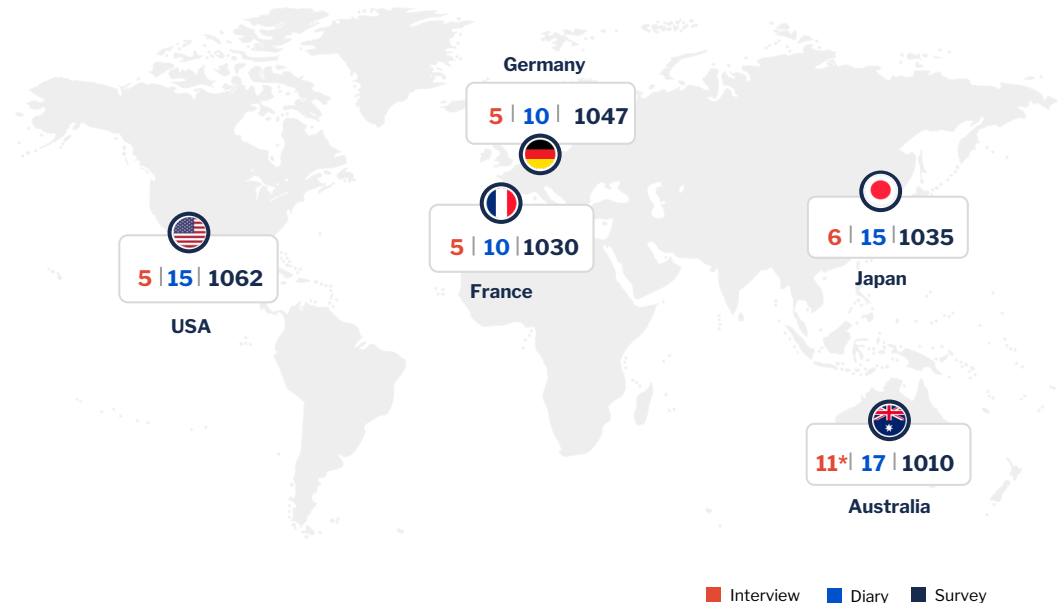
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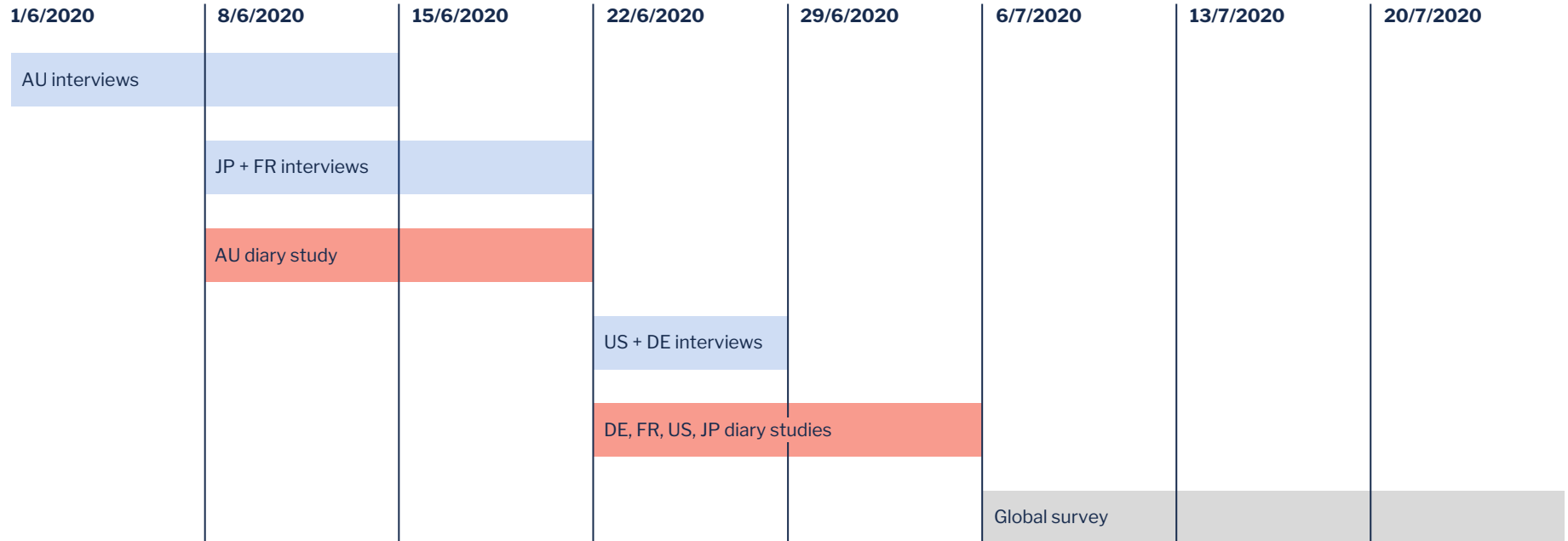
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A critical moment in time

Our research spanned the initial response to COVID-19, and tracked the impacts and changes over the following three months.

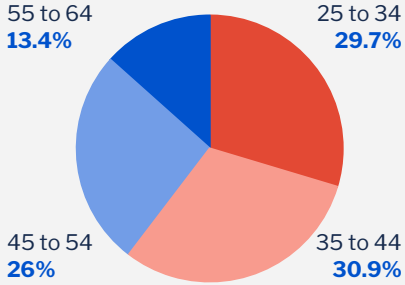


Who we spoke to

Working arrangements

Full-time
(30+ hours per week)

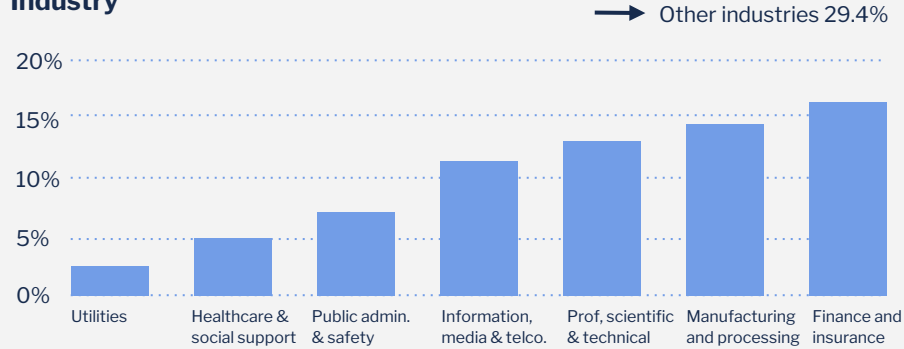
Age



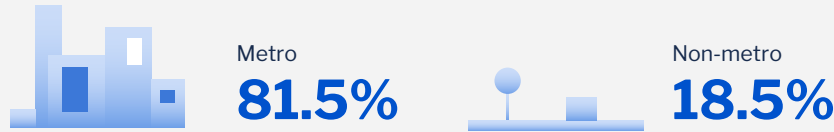
Gender



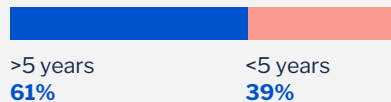
Industry



Location



Time employed at company

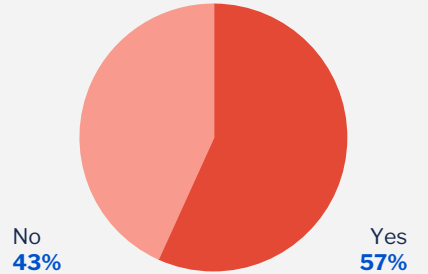


Role

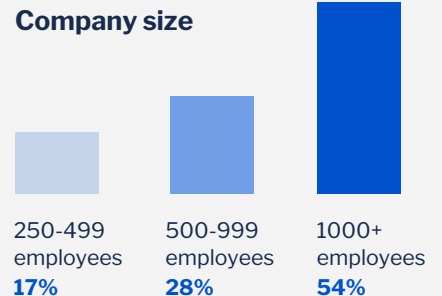


Homeschooling or caring for children during work day due to COVID-19 restrictions

Note: of people with children living at home (57% of total)

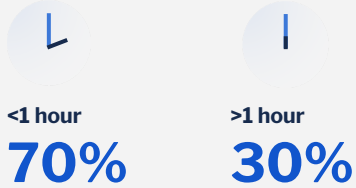


Company size

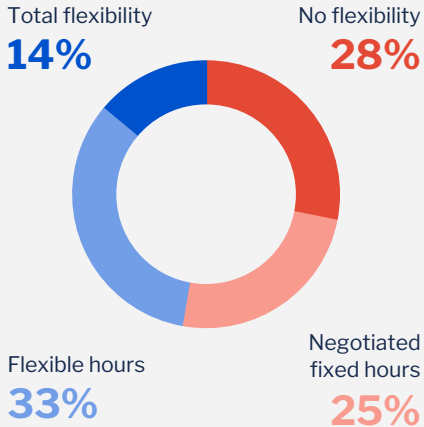


Their work life context

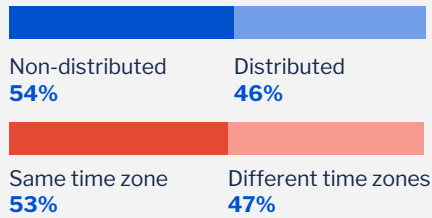
Commute time



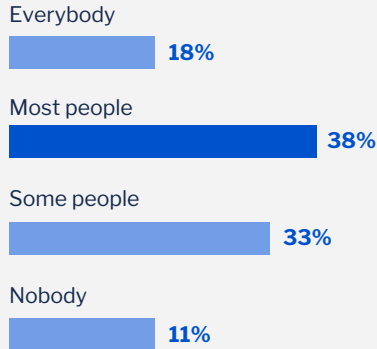
Flexibility



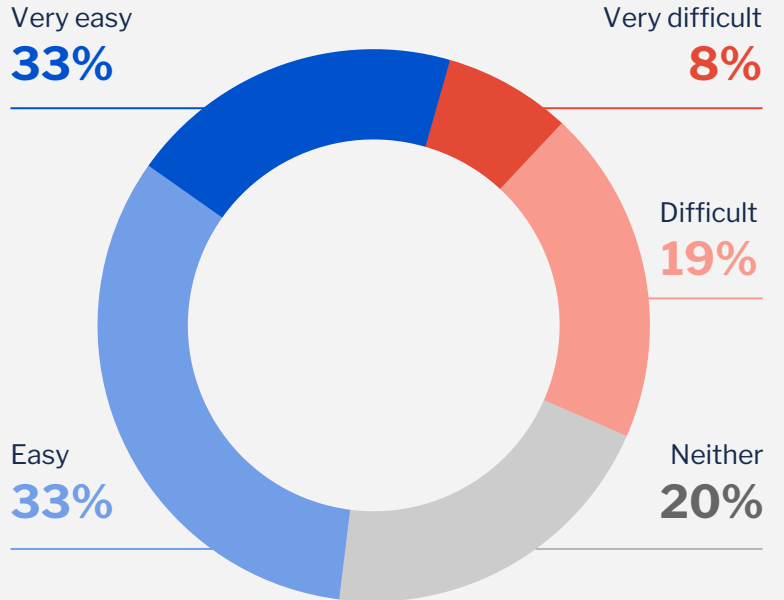
Team location



Number of people in the company working from home during COVID-19 restrictions



How easy or difficult has it been to effectively work at home during the COVID-19 restrictions?



What's changed?

Quantitative highlights*

*Based on sample sizes achieved, the quantitative findings found in this report are representative of the respective geographies. The population of interest is knowledge workers working from home during the COVID-19 restrictions. Margin of error is +/-3% based on a 95% confidence level.

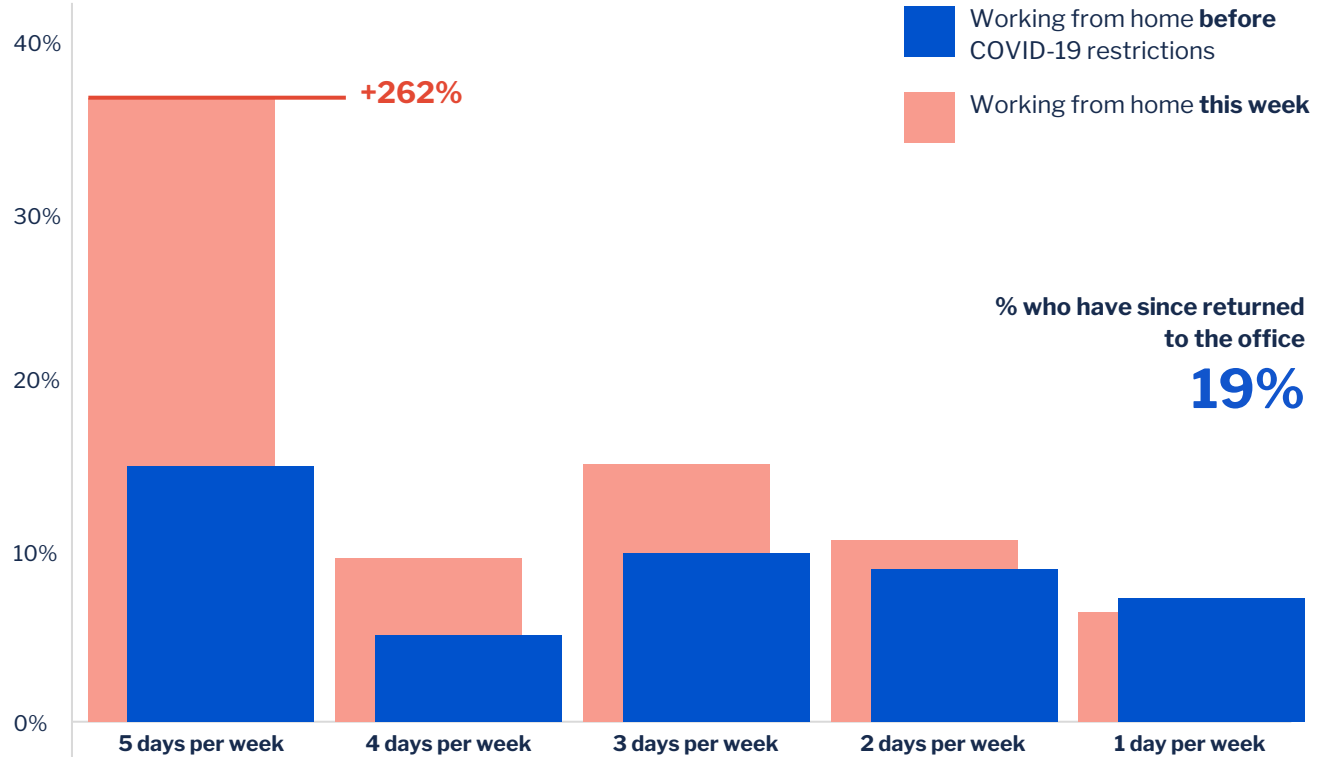
Novices forced to make it work

Knowledge workers have made a dramatic shift. Working at home was something new for most of them. Even with some returning to the office, the vast majority continue to work from home on a full time basis.

How often did you work from home before COVID-19?

Never or rarely
42.6%

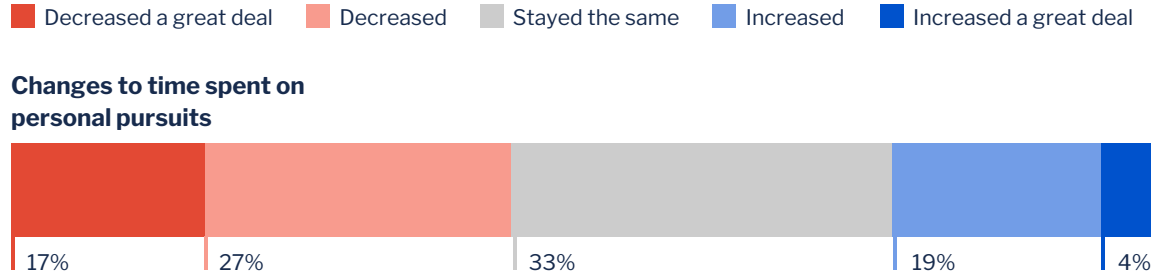
1-3 times per month
10.5%



There's little time for personal pleasures

The demands on our work and home lives have taken us for a spin. For many, our need to take care of ourselves and others has increased (32%). Our workloads have taken different directions - some have less, some have more. These both have a consequence.

All in all, there's been a real loss of time spent on the joy and pleasure of living - 44% of people say they have spent less time on personal pursuits. People find different ways to adjust and adapt to their 'new normal'.



The ripples have tested our resilience

The ripples of this change are felt across all parts of our working worlds. In spite of the dramatic shifts to our work and personal lives, people working from home report relative stability (or improvement) for the most part. We see resilience, pragmatism and gratitude at play.

What are the biggest changes?

Satisfaction with work-life balance

44%

Confidence in my own abilities

43%

■ Much worse
 ■ Worse
 ■ Stayed the same
 ■ Better
 ■ Much better

How well our business is doing



How well our team gets along with each other



How well our team works together to achieve



The security of my job



Confidence in own ability to achieve



Commitment to my job at my company



Satisfaction with my company's leadership



Trust company to do the right thing by employees



Satisfaction with work-life balance



Satisfaction with job



Managing More

Managing More

One key finding helps to describe the widely felt impacts of remote work on employees.

All participants described the physical, emotional and professional shifts they needed to manage in order to remain successful in their capacity as ‘employees’.

We have summarised the cumulative effects of these shifts as ‘Managing More’.

Managing More describes the new activities workers are being expected to manage in order to remain successful in both their working and personal lives, as the nature of work changes.

New efforts include learning new tools and systems; coordinating with a distributed team; negotiating for better work resources; scheduling care responsibilities with a loved one; and finding ways to enhance focus and attention.

While some efforts may appear personal in nature we must remember that recent experiences make the distinction between ‘work’ and ‘personal’ increasingly confused. Many ‘personal activities’ will now be conducted in pursuit of being a ‘good worker’.

For example, ‘providing care to dependents’ and ‘maintaining a clean home’ may be framed as ‘finding time to focus’ and ‘creating a motivating environment’, respectively.

Managing More: At a glance

- The changing nature of work has brought with it new expectations of workers. Across all geographies, workers shared how they were now ‘managing more’ in order to remain successful in their work.
- Some efforts are strongly aligned with their original working roles, such as learning to navigate new platforms, collaborate digitally, or sustain team relationships at a distance.
- Activities once seen as ‘personal’ in nature can now be seen as supporting workers’ efforts to remain successful in a professional capacity.
- Organisations should be mindful of recognising workers’ new efforts. Recognition need not be financial: many workers may require additional training, resources, or administrative support to help them navigate this ‘new normal’.

Managing More

Quantitative results demonstrate the additional management employees needed to take on.

A high portion of people believe most measures - from utilising their technical knowledge and skills, to acting with care and empathy for others - have become more important since the shift to remote work.

The shift to remote working has demanded more of many workers.

A range of work tasks have become significantly more important to employees, now they are working from home.

For example, workers believe it is now more important to

- effectively communicate with others in their company (46%)
- act with empathy and care for others in their company (45%)
- apply professional knowledge or training to solve problems (42%)

How has the importance of certain work-related skills changed during COVID-19 restrictions?

■ Much less important
 ■ Less important
 ■ Much the same
 ■ More important
 ■ Much more important

Act with empathy and care for others



Effectively communicate with others



Develop trusting relationships with others



Motivate myself or my team



Create good rapport with others



Use my technical skills to complete tasks



Understand what others are feeling + thinking



Problem solve using professional knowledge



Lens Framework

Lens Framework

The experience of remote work, and the impacts of COVID-19 more broadly, has changed the lives of all our participants.

We identified four lenses that group our qualitative data in a way that honestly reflects the extent of the change experienced across all geographies.

The findings generated by the use of this framework help to uncover answers to the question: **What's changed?**

The Lens Framework describes the different areas of work (and life) that have been impacted by the experience of remote working.

Each category is intentionally broad, to allow us to consider the breadth of this change.

For example, changes to productivity, monitoring, availability and work duration can all be described through the lens of **'time'**; impacts on home responsibilities, work roles, and the expectations of each are encapsulated in **'work identity'**.

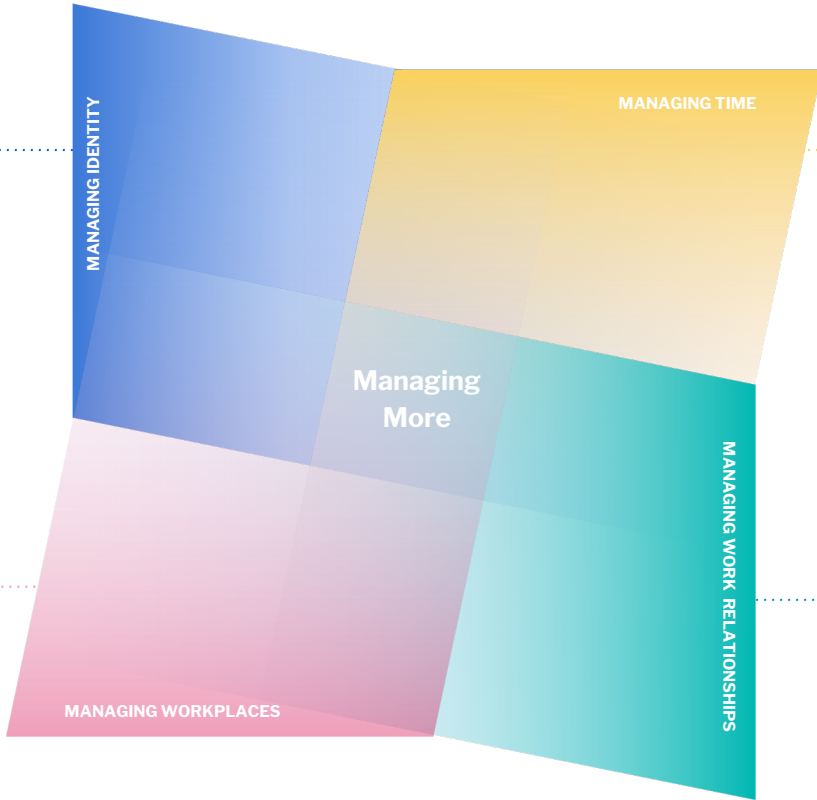
Importantly, the overlapping nature of these categories helps to illustrate their relationship with one another.

For example, how changes to our **'workplaces'** may influence, or be impacted by, **'work relationships'**.

Using the Lens Framework

- We have used the Lens Framework to group our qualitative findings in a way that is genuinely reflective of the breadth of change. The categories provided deeper access and interpretation of our findings, when compared to specific or narrow groupings such as 'productivity' and 'team cohesion' alone.
- The Lens Framework has been applied not only to our global findings, but also at an individual country level. This demonstrates the universality of the framework.
- We recognise that certain insights and observations may be relevant to not one but potentially all of the lenses. However, we have coded each insight and observation within the most strongly related lens.
- We believe there is an opportunity for businesses to utilise these lenses in future work that explores the experiences of workers, teams and organisations: specific to remote, hybrid or other working arrangements.

Lens Framework



● Managing identity

The line between private and professional selves has blurred, and the ways in which we manage these separate identities has shifted.

● Managing time

The ways in which we balance home and work demands are changing. Coordinating and aligning is more time consuming. There's a new autonomy at work, but it's harder to protect boundaries.

● Managing workplaces

Organisations have as many workplaces as they do employees, and support needs and expectations have changed.

● Managing relationships

The ways in which we interact and form connections with our colleagues has changed.

Identity

1

Relaxing work cultures threaten people's work identities.

Spotlight on: Work identity

2

Hybrid work is expected to limit visibility & career progression

Spotlight on: Maintaining visibility

3

People find it challenging to balance home & work identities

Spotlight on: Delineation

4

People are reassessing their fixation on their work identity

Spotlight on: Personal identity

Relaxing work cultures threaten work identities

The relaxation of work cultures distanced people from their work identities.

Some are working to maintain a sense of professionalism while others (namely, women) have felt liberated from expectations to present in a certain way.

Relaxing codes of professionalism

The standards of professionalism have relaxed in the transition to remote work. Many feel permitted to dress, and communicate, in a more casual manner.

Some found it difficult to actualise their work identity without certain rituals of 'getting presentable', and the daily travel to work.

They also found their work identity was less commonly affirmed in the way they were treated by others, who had become more personable.

"I can sit in a relaxing posture. It's good that I don't have to care how others see me." - JPDS

"I like wearing heels, blazers, dresses. Doing my hair instead of this mess of a bun, not caring cuz I don't see anybody." - USADS

Protecting & expressing the work self

People threatened by the relaxed work environment sought to protect and/or express their work identity in new ways.

They had become more formal in their written and verbal communications; removed personal elements from their workspaces on video calls; abandoned the camera function where an untidy space or appearance would be exposed.

Some found others' informality distasteful, and hoped their maintenance of a high standard would encourage others to become more professional, too.

"When the camera is turned OFF, I get into a relaxed mode since they can't see me." - JP5

"(Others) wear sloppy clothes, don't do their hair & makeup. They'll say 'Hey'. I don't say that. I say 'Hello, good afternoon'." - AUS5

Liberated from the 'status game'

There are fewer ways to communicate status or dominance in a digital world. While this 'flattening' was difficult for some, many women found it liberating.

They shared how, without the performative elements of work (worrying about looking presentable, or looking for ways to command respect) they were able to simply focus on their jobs.

"My husband sees me with no makeup on & says 'Must be nice getting to stay home, huh?' - JP6

"I'm calm & relaxed. I manage things in my way. I rarely need to consult my colleagues to get their opinion." - FR4

"You feel kind of restrained when you're in a business office. I can get anxiety going into a meeting with people who, for whatever reason, I might see as above me. (I) feel a little more comfortable & open." - USA3

Spotlight on: Work identity

Spotlight on: Work identity

Missing 'work ready' rituals

The transition to remote work has seen many people abandon their typical work preparations, and some are struggling to let go.

For these people, rituals held a certain value in helping them to fulfill their work identities. Morning routines, like becoming 'presentable' and commuting, felt like transitory moments signalling their 'work-readiness'.

Without these work rituals, people feel disconnected from their work identity.

"Like, driving to work, it's not the funnest thing in the world, but it gave you this kind of a sense of purpose."

– USA5

37% are feeling lost without their work routines, like getting ready for work and commuting

Reluctant to share a personal side

The relaxing of work culture has seen colleagues become more personable with one another.

They are sharing more personal details of themselves, or different sides to their personalities, that may have been 'masked' in a more formal office environment.

This vulnerability is causing some discomfort among those who would prefer to keep their private lives private, and maintain a professional reputation in their organisation.

"My desk is in an open living room. I'm always thinking oh my god, is it tidy? I don't want to have any laundry showing. I want it to look professional. Others have got the cat on their lap, they're sitting in some ugly tee shirt like they're cleaning the garage. I still dress formal, I'll have a shirt on."

– AUS3

31% were concerned about letting people see into their personal lives

Spotlight on: Work identity

Women feel more confident in their abilities

Women were more likely to enjoy the relaxing standards of professionalism.

Many reflected that preparing and maintaining work identities was exhausting. Now free from expectations of 'presentability', they felt more able to focus on doing their jobs.

This is demonstrated in the quantitative survey results: almost half (**46%**) of all women say their confidence in their ability to achieve has improved since the move to remote work. Only two-fifths (**40%**) of men believed the same.

"You feel kind of restrained when you're in a business office. I can get anxiety going into a meeting with people who, for whatever reason, I might see as above me. These video calls just makes me feel a little more comfortable and open."

– USA3

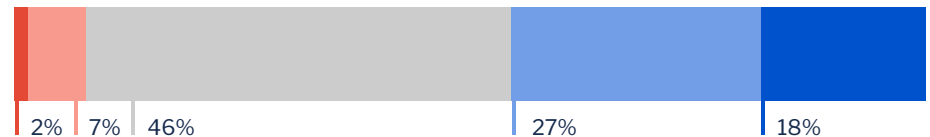
Confidence in my own abilities to achieve at work

■ Decreased a great deal
 ■ Decreased
 ■ Stayed the same
■ Increased
 ■ Increased a great deal

Men



Women



Spotlight on: Work identity

Women want to work fully remote

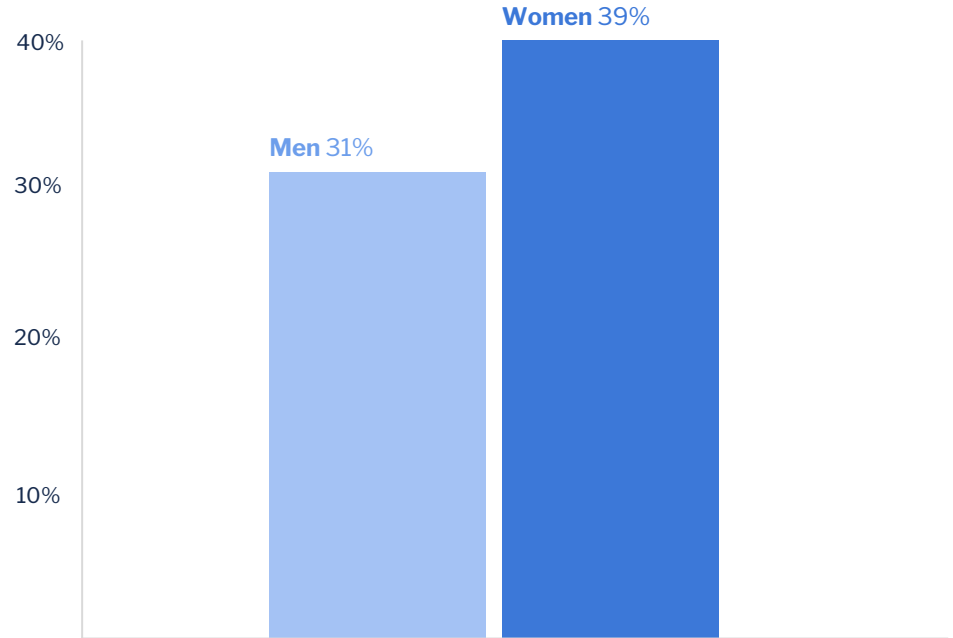
Freedom from the more performative elements of work may contribute to women's comparatively stronger desire to work fully remote.

Survey results show two-fifths (39%) of women want to work fully remote (as opposed to a mix, or from the office) compared to just 31% of men.

However, many shared concern about maintaining visibility in the office, should those in influential positions choose to work from the office.

"I feel like you would be disengaged and people will feel like they're missing out, socially and work wise."

- AUS2



39% of women want to work fully remote

compared to just 31% of men

Yuri's story

Yuri works as a Supply Chain Manager for an established manufacturer on the West Coast. While he is in a leadership position, Yuri isn't afraid of 'dipping down' to help his team with smaller tasks.

In recent years, he has made definitive efforts to develop and formalise what he calls his 'natural innovation mindset'. He is currently completing an MBA in line with this ambition.

While Yuri has a strong respect for his organisation, he recognises their conservatism, and hesitancy to adopt new ways of working.

He feels he may soon 'outgrow' them, and will start looking for new places to apply his more creative thinking.

Age: 43

Location: West Coast, USA

Life situation: Married with children; Homeowner

“The company I work for is a 50+ year old company. There is a lot of red tape and thus sometimes it becomes difficult to apply the newer ideas and pieces of information that you learn.

That's why I would probably want to move to a lesser established company, maybe even a startup, where I could apply some of the knowledge I am gaining right now through my MBA.”

Hybrid work is expected to limit visibility & career progression

People believe remote working could open up more job opportunities.

Yet some are concerned about the realities of being distanced from others, particularly those in influential positions, that could help them to further their career goals.

More opportunities available

Remote work has proven its potential, and people are now considering the new opportunities it could bring in the longer term.

People were beginning to see job prospects through a global lens, which widened their net of potential employers. Some worries that this would also make job hunting more competitive.

Those with significant responsibilities (mortgage, dependents) or in high-risk industries were less willing to disrupt their stability by exploring new options.

"(To get a national role, I'd need to move). I'm getting to an age now that (I don't want to). Now that I could do remote, I'd do it all day." - USA4

"Say you're in Hamburg & the employer's in Munich. You could apply and say that you'd want to work from home, but fly to Munich once a month. I think a lot will change." - DE5

Sacrificing career progression

'Remote preferred' workers are worried about being separated from those who are, or are planning to, work in-office.

Many shared visions of where they might be separated from people in influential positions, such as managers and human resource professionals at their work.

They believed it would be difficult to earn their attention and it would therefore limit their chances of promotion.

"(As a manager, the biggest challenge in hybrid would be) to lead the team fairly. To not favor anyone. Those you work with directly and those who work from home." - DEDS

"I am concerned about the ability to get promotions and raises if I were to become a full time (remote worker)... since I wouldn't have regular face to face contact with the people who make human capital decisions." - USA2

Newcomers risk being 'on the out'

People are concerned about starting at organisations, or in new teams, that are hybrid- or fully-remote.

They believed newcomers would struggle to build rapport with colleagues and to demonstrate their value to seniors, in particular.

This suspicion was confirmed by those with new team members - they stated they felt less comfortable checking on their wellbeing and providing guidance.

"It may be difficult to work with newcomers when members are replaced or added." - JPDS

"If we don't know each other, we can't build cohesion at a distance." - FR2

"With new staff, I don't have that relationship, I don't know what they're doing with their time (and I don't really ask)." - AUS5

Spotlight on: Maintaining visibility

Spotlight on: Maintaining visibility

Out of sight, out of mind?

People believe that a choice to work remote while others remain in office could limit opportunities to develop their work identities.

Being distanced from others, especially those in influential positions, was felt to threaten their visibility and, ultimately, their career progression.

The desire to remain visible may contribute to some 50% of workers' saying they would reconsider their remote work preference if their colleagues returned to the office.

“I love the fact I’m stress free and really productive but I’m afraid I lose credibility and become disposable. I feel like out of sight out of mind kind of. It’s easier to lose sight of the value I would bring.”

– USA1

50%

of **‘remote preferred’** workers would change their mind if their team were in office

Akira's story

Akira works for a cosmetics company in new product development within a tight-knit team of five others.

When in the office, Akira was able to rely on his engaging presentation style to communicate ideas to his teammates and other department heads. However, since the move to working remotely, he's struggled to feel as effective in his work as he's less proficient in creating the formal documents and presentations now used to share ideas across the business.

Wanting to appear on top of his game, Akira continues working outside his prescribed hours in order to fine tune presentations. Often working late into the evening, he delays hitting 'save' until the morning to avoid his extra work being logged in the document in order to appear more productive.

Age: 26

Location: Kyoto, Japan

Life situation: Single, lives alone

“You can see the time when PowerPoint files are saved and updated (by different people).”

My technique to disguise the fact I've been working late by saving it again in the morning. This way it looks like I've done more work in less time.”

People find it challenging to balance home & work expectations

People that have caregiving responsibilities at home found remote work more difficult.

Participants felt that they were unable to bring their 'best self' to either their home identity (e.g. as a parent or carer) or their work identity (as a professional).

Managing expectations

People with significant domestic care duties (namely, those with young children) had the unique challenges of occupying a space where they are expected to be both 'caregiver' and 'employee'.

The emergent (and comparatively urgent) nature of care duties meant they were often prioritised. Work duties, in contrast, are seen as more flexible: able to be reshuffled (if tasks are collaborative) or done asynchronously (if tasks are independent).

Regardless, caregivers felt weary of the constant 'mental shifts' required of them, and sought ways to help them more fully dedicate time to either role.

"At home it's always 'just one more thing'. Next thing you know a whole hours passed (that you need to make up for)." - ANZ2

Creating space to focus

Caregivers shared steps they'd taken to more clearly delineate between time spent as 'caregiver' and 'employee'.

This was achieved by minimising the need to provide care: coordinating with others to fulfill dependents' needs; and managing the expectations of those dependents.

This was also achieved by minimising work duties to create space for caring to happen 'in full', though this depended on the good grace of other team members, including more senior colleagues.

"I have set up a desk in my bedroom because I know if I close the door, the kids know not to bother mummy while she's working." - USDS

"We had a set schedule each day: who is picking up the kids, who is putting the laundry on, that kind of thing." - AUS1

Struggling to be present

Even with 'delineation measures' in place, many expressed worries about just how 'present' they were, and how well they were performing, in each role.

Many felt they were disappointing themselves, or their dependents: constantly distracted by others' needs.

A smaller minority expressed concern they were also disappointing or frustrating their teammates, who were often asked to accommodate their needs.

"I had this guilt, but I realised I couldn't do both (perfectly). I had to let that go." - ANZ5

"(Others) can't understand why I might not have a task finished because I'm distracted." - DE4

"I find myself being more demanding than I should - I don't have kids or responsibilities (so I expect the same standards as before)." - AUS3

Spotlight on: Delineating

Spotlight on: Delineating

It's more difficult to maintain boundaries

People find it more challenging to delineate between their personal and professional identities while working from home.

Caregiver struggles are, perhaps, more obvious. But those without children also had significant challenges.

Many shared that, without home duties to occupy their attention, they were prone to remain working much longer hours, and without refreshment.

“We used to have an alarm set at 8:20pm that would force me and the team to go home. Now, working weekends and late at night happens a lot more often.”
– FR5

54%

say it's **more difficult to maintain boundaries** between work and personal lives

Some find it harder to 'switch off'

The proximity of peoples' work stations to their living spaces makes it difficult for people to context-switch.

People shared how, even when their offices had 'shut down' for the day, their proximity to their work stations was a distraction.

The physical reminder of work would prompt work-related thoughts, and even stir a sense of neglect.

“My laptop used to stay in its bag by the front door when I got home. But now, with the computer set up and 'just there', I tend to find myself sitting there for a lot longer.”
– ANZ4

23%

say it's **more difficult now to stop thinking about work** in their personal time

Spotlight on: Delineating

Parents struggle to be effective

Both personal and work identities are now expected to 'perform' in the same space, which can make it difficult for people to understand which 'role' takes precedent.

This is especially difficult for caregivers, who have emergent home needs. Caregivers shared that this bore a strong mental challenge, in that they needed to 'context-switch' at a moments notice.

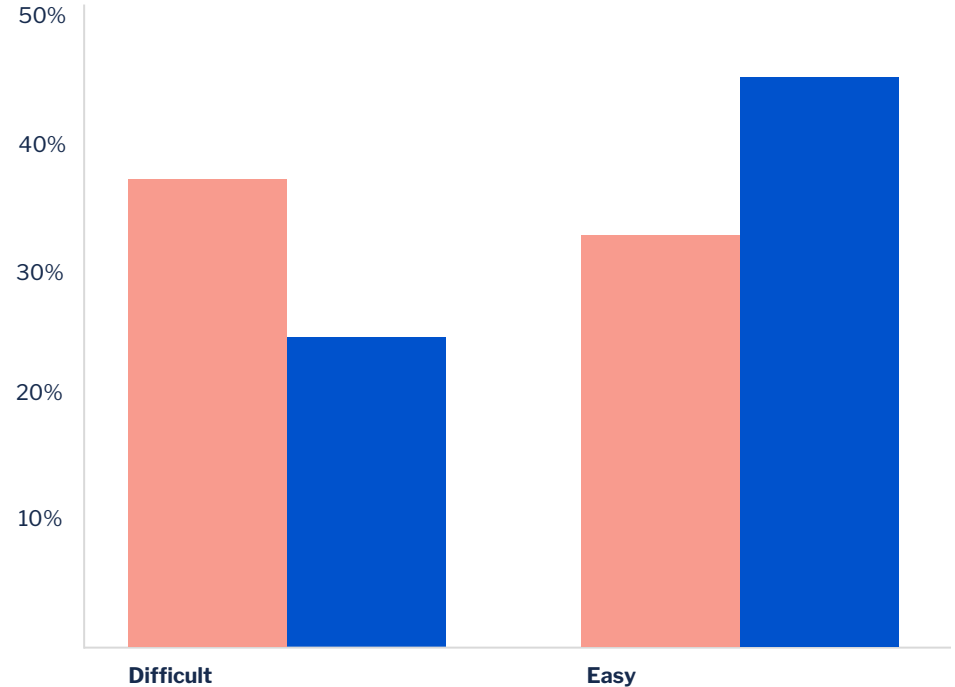
Survey results show caregivers were less likely to believe being effective was easy (38%) compared to those without children (46%).

"I'm always mom to them hundred percent. But I'm also an employee who has a job that has to get done. It's just been a very emotional stressful couple months."

– USADS

How easy or difficult has it been for you to work effectively at home?

Parents Non-parents



Marie's story

Marie works for a large insurance company as a risk assessor and shares a large inner-city apartment with her husband and two children aged 7 and 9.

While Marie has been pleasantly surprised at how well she's adapted to working remotely, she's struggled most with balancing her role as a parent and professional. The biggest challenge has been setting boundaries with her children and helping them understand she's not to be disturbed during work hours. This task was made all the more difficult as Marie was the parent who, prior to working from home, most often helped the kids with homework each evening.

Now that everyone has adjusted, Marie is thoroughly enjoying working from home and loves the slower pace of life and more time with her family.

Age: 40

Location: Lyon, France

Life situation: Married, two children

“Before I was 400% available for my children, it was an absolute priority and now the fact I am working at home and not being able to answer them was difficult.

It was difficult for them to understand that only when I took my break or stopped could I be available.”

People are reassessing their fixation on their work identities

People used changing circumstances to reflect on their priorities, and focus more time to personal goals.

People are beginning to restructure their working arrangements to help actualise these plans.

People without children channel their focus on work

Young people without dependents have fewer ways to occupy their time, and are dedicating more hours to work.

At first, this was welcomed as a 'boredom buster', but negative impacts on health and relationships proved it to be unsustainable.

Determined to prioritise their wellbeing, some had begun to turn down new work opportunities and refocus on more personal goals.

"It's actually just a pause, a once in a generation kind of moment that we get to stop and think about what we want for our lives. And I think I want (more peace) like this." - AUS4

"I think it's great that through the whole pandemic you had time to let your thoughts run free and think about what you'd like to change, what you would like to do differently." - DEDS

Parents unlock new bonds with children

Working from home meant more family time for parents which was, on the whole, a rewarding experience.

Parents with adolescent children had the comparative 'luxury' of their dependents being self-sufficient, meaning time spent together was more recreational in nature.

Those who homeschooled found it stressful in parts, but appreciated the new insight it had given them into their children's development.

"I have seen my family like never before. I am usually out of my house around 8 am, and in the evening I don't come home right away." - FR3

"I'm a lot more in touch with his learning needs, and definitely more aware of his struggles going into the parent teacher conversation" - ANZ5

Restructuring work for more 'life'

Many people found cause to reflect on their priorities and pledge more time to personal goals. They were hesitant to return to a normal that would see them consumed by work.

Some felt a simple change in attitude could help them to maintain their focus.

But others sought more dramatic action: sharing plans for shorter work weeks and/or longer breaks.

While these plans were not common, the trend will be an important one to watch if workplaces and workers alike become more distributed, 'globalised'.

"(My personal ambitions) take up a lot of time. It isn't compatible with full-time work." DE1

"I'm hoping I'll be able to financially afford working less hours a week." - AUS1

Spotlight on: Personal identity

Spotlight on: Personal identity

Personal pursuits get less attention

People are spending more time in their personal spaces, in closer proximity to many of the people and spaces that reinforce their personal identities.

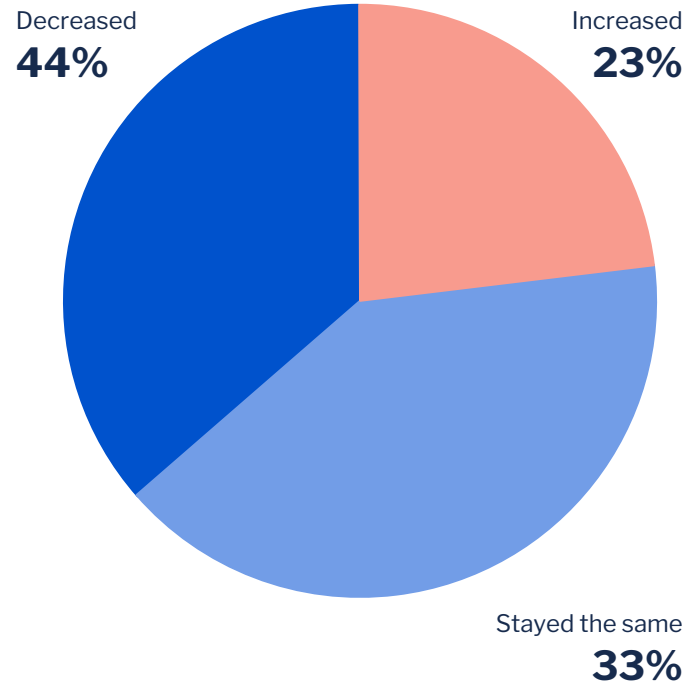
Yet most people (44%) are spending less time on personal pursuits than when they were in office.

This may be driven by a number of factors. Some people experienced increased workloads (27%) and even more people had increased care duties (32%).

“It's been really difficult. Not easy at all. But I do find time for myself. There are some days I'll do 7 or 8 hours, and some days I'll do 10-11 hours.”

- ANZ1

Time spent on personal pursuits



Spotlight on: Personal identity

People intend to find more personal time

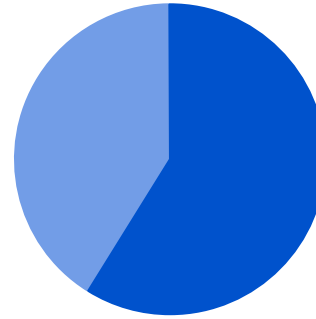
People have lost much of their personal time in the shift to remote working. This has prompted people to reflect on their priorities.

Many shared ‘epiphanies’ they had undergone, often as a result of increased work or home pressures.

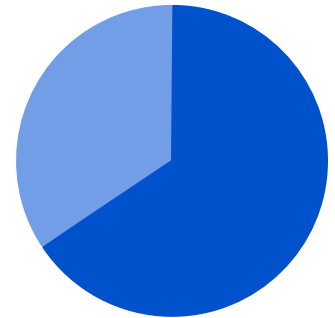
They had pledged more time to focus on personal ambitions, such as developing important relationships or nurturing personal interests.

“It forces us to reflect on what we want to do. Do you want to put in this much effort (at work)? Everyone finds me to be wanting to have a career and sometimes I’m like, ‘That’s not really what I want’. I would rather have a happy, healthy, laid back life than a lot of money.”

– AUS2



(59%) realised new things about themselves, and what's now important to them



(66%) better appreciate how important the quality of their life outside of work is to them

Emmanuel's Story

Emmanuel leads the creative branch of a large financial institution in Australia.

A self-described extrovert, Emmanuel has spent much of the last decade cultivating relationships, both in and outside of work.

When most of his social engagements were first put on hold, Emmanuel felt at a loss. He put his hand up for more and more work. But, realising that was unsustainable, he's started to push back on others' demands, and made a conscious effort to be 'still'.

He has since been pursuing his love of art, and has found the time to rekindle a love interest that he'd previously dismissed.

Age: 33

Location: Melbourne, Australia

Life situation: Partnered; living alone

"I'm just so, addicted to the speed of life. Everything just happens. I get up & I go to work and I don't think about it.

Having a couple of months to think about things and what I'm happy with and what I'm not. What I'd like to change and what I think I can change. I feel like I know myself a lot better than I did two months ago."

Time

1

People feel more effective, but are anxious to show it

Spotlight on: Effectiveness

2

Organisations are struggling to provide support to new challenges

Spotlight on: Maintaining motivation

3

Workers are taking responsibility for their own balance

Spotlight on: Flexible routines

4

Asynchronous working makes availability ambiguous

Spotlight on: Coordination costs

People feel more effective, but are anxious to show it

People report high levels of effectiveness, evidenced in longer work days and less time spent on activities.

Some are concerned they aren't able to demonstrate their input with 'hard metrics', a sentiment echoed by most in leadership roles.

Feeling more effective

People are confident their productivity has increased since the transition to remote work.

Most relied on the length or 'intensity' of their working day to evidence this.

Those with low care responsibilities, in particular, felt their days had become more intensive due to their being fewer distractions in the environment.

They felt more able to focus on their tasks without the natural interruptions of office life.

"You have the feeling that you have more time, even though at the end of the day you might work a bit more." - DE3

"In office you lose some work time (socialising). Now, I spend 10 hours solid on the computer, without any (of that)." - AUS1

Demonstrating productivity

People are worried their organisations may underestimate the work they're doing, driving many to seek 'evidence'.

People in more complex roles, or with 'soft measures' of success (such as client services, people managers) were more anxious than those with clear targets and hard measures.

Some people had taken to 'busy work' in order to prove their presence and worth, such as scheduling meetings others saw as unnecessary.

"(Clients) want to see (leadership) sitting there - that's what adds value. Without being able to command that authority (over Zoom), I'm a bit of a (non-contributor)." - AUS4

"I report "I'm done for the day" but I'm actually not done and will continue to work after that. I want to project the impression that I'm a person that gets things done within my work hours." - JP5

Looking for measures

Most managers did not have a clear view of their team's capacity. Where they did have measures, many felt they were unreliable.

This had some worried about whether team members were working to their full potential.

This concern was shared by some individual contributors who suspected others were doing the 'bare minimum' to prove productivity; shying away from volunteering to help where they could.

"Of course we would see an increasing in tickets (in JIRA), because the previously offline tasks have shifted to the online world." - ANZ SME

"How do we know if one or the other has a much lighter workload? It's hard to tell. It created a lot of frustration because some felt that others were not pulling their weight." - FR4

Spotlight on: Effectiveness

Spotlight on: Effectiveness

People are better able to focus when working remotely

People felt that remote working had provided them with greater means to focus.

This was often attributed to the fact they were interrupted by ad hoc requests, advice or invitations to socialise less frequently.

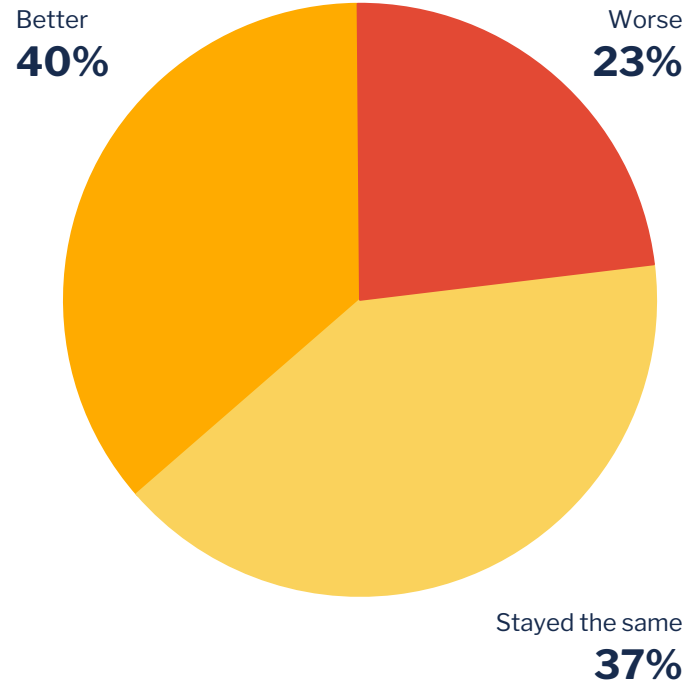
They shared how this had led to an 'intensification' of the working day, where large portions of time were dedicated to concentrated work, without unnecessary distractions.

People's sense of increased focus or control could contribute to people reporting higher levels of effectiveness.

"I am more concentrated. Because in the office it's 'can you please do this and that', lots of meetings. Of course they do happen now as well, but you are less distracted and get more done."

– DE5

Level of work distractions throughout the day



Spotlight on: Effectiveness

People feel they're more effective

Most people (**53%**) believe it has been easy or very easy for them to be effective while working remotely.

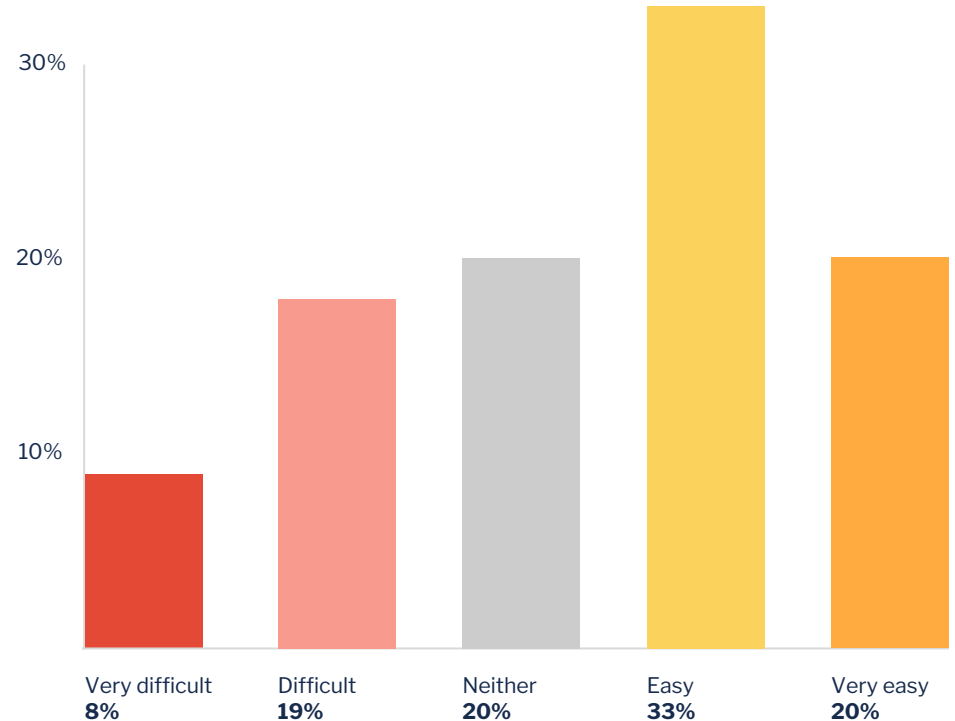
This demonstrates considerable resilience, when the additional coordination and learning required to adapt are taken into account.

The added fact that many have similar (**49%**) or increased (**27%**) workloads, makes the effort even more commendable.

"I have proven to myself that I can be productive here - I can work effectively. I can access the (files I need), and the people I need, and I'm just fine."

- ANZ4

How easy or difficult has it been for you to effectively work at home?



Spotlight on: Effectiveness

People want to demonstrate their effectiveness

Individual contributors and managers alike are interested in measuring effectiveness.

Individuals are commonly driven by a desire to demonstrate their value, in a time where many businesses may be reassessing their operations. Note that two-fifths (43%) of people stated they had become more concerned about their job security and careers since the shift to remote work.

Leadership sought metrics that would help them understand team capacity, and the viability of continued remote working.

"I sense self-consciousness in the team. They're now reporting to me each week, the amount of 'effort' (time) they're spending working on projects."

– USADS

33%

say more of their time is now spent
**reporting to clients or
managers**

Organisations are struggling to provide support to new challenges

People feel the time they dedicate to work is overlooked by organisations.

Some are experiencing income losses, but most feel their jobs have become rather thankless.

This feeling (of neglect) is compounded by most organisations' failure to provide new supports to workers managing new challenges.

Workers feel demotivated

People found it difficult to maintain motivation without the natural dynamism of an office.

Those in high density households were often confined to a single working space, and more likely to share the challenges of an unchanging environment.

Those in low density households were more sensitive to being isolated, and were missing the studious hum of others.

For both groups, time was felt to 'drag on'.

"I'm really flat and tired and somehow I don't really pull myself together. I lack the motivation or someone to motivate me." - DEDS

"I needed a change of scenery so I did the work from our dining room table while my roommates were out... Everyone liked the idea of (remote) until you had to do it every day." - USDS

Fewer recognition, rewards

The ways workers are recognised and rewarded for their time is changing.

Some are experiencing loss of income, as a result of company-wide salary reductions or, for those on commission, a decline in sales opportunities. Others feel they are not being fairly compensated for increased workloads.

Note that not everyone expects financial compensation. Many miss the implicit rewards associated with co-location. For example, being seen to be working late; having others witness seniors' thanks.

People suspect senior colleagues are less likely to thank them digitally, because it could carry more weight; seem more formal.

"Some people don't make the effort to thank you. And if I don't feel valued, I don't want to go above and beyond" - AUSDS

No new demonstrations of care

Worker wellbeing now depends on a multitude of factors: from their cohabitants' moods and movements, to the 'health' of their communities' infrastructures and amenities.

It should be noted that many of these factors are outside of a workers' control; much less, their organisations.

Regardless, few organisations had adapted the suite of wellbeing products and services for their employees.

Most had simply 'upped' promotion of their psychological services which most workers felt were not relevant to them.

"I've been feeling a bit blue, but I tend to try and fix that with exercise... I know (EAP is) there but I don't feel I need it." - USA2

Spotlight on: Maintaining motivation

Spotlight on: Maintaining motivation

Office experience is naturally stimulating

People discovered that, without the vibrancy of office life, it was often harder to maintain momentum in their work.

This was especially true for those living in low density households where the environment is comparatively unchanging.

They shared how time was felt to draw on, with fewer reminders to refresh from work.

"The isolation at home can make you feel alone (especially when you live alone) The days seem to roll into one - you cannot differentiate between one day and the other week."

– AUSDS

50%

miss the energy they got from working with others in the office

People are looking for new modes of motivation

The office experience is naturally stimulating. Working from home, workers need to engineer their own moments of motivation.

People shared how they and their team had taken on responsibility for regulating their energy and focus levels.

Managers played a pivotal role in maintaining their team's sense of purpose by planning their workloads into more manageable chunks and creating more moments for collaboration.

"Leading in uncertainty, you need to provide clarity. We broke out challenges down into 6 week blocks, and talked about how we'd support each other to (get it done)."

– ANZ3

45%

believe it's now more important to know how to **motivate themselves and their team**

Workers are taking responsibility for their own balance

Many workers are struggling to find the right balance between time spent on work, and time spent on personal endeavours.

Workers are taking advantage of the freedom to work asynchronously to create moments of rest across the working day and week.

Personalised wellbeing ‘tools’

Organisations are playing a less active role in enhancing workers’ wellbeing, now that many initiatives (such as organised sports, hosting social events) are on hold.

Workers are finding new ways to re-energise. Most find there are more options, and that the options are more personalised to their own needs.

People are exercising over lunch, without worrying about returning sweaty to the office. People are now socialising with neighbours over lunch, instead of colleagues.

For caregivers, sharing wellbeing activities with dependents has been a particularly rewarding experience.

“Being able to run at noon, and take time to play sports (with kids) made me feel good.” - FR4

Engineering moments of rest

People find there are fewer prompts to break from work while working at home.

They shared how, in an office, there are more invitations to disconnect. Some are explicit (being asked to coffee by a colleague); others implicit (when others break for lunch, so did they).

Without these invitations, people find themselves working in long periods without rest.

People are now engineering their breaks, and even sharing reminders with others.

“I lock my computer and go on the sofa or do other things to change my mood.” - FR4

“We remind each other to go on breaks, like coffee breaks lunch breaks, things like that. We will message, ‘Is it coffee time?’ or ‘Time for a beer?’. Those type of things.” - AUS6

Unlocking more ‘downtime’

People are organising their routines to make more time available for wellbeing.

Workers shared how they felt more free to respond to slumps in energy, or the natural fluctuations in mood they experienced.

Many found ‘micro-moments’ to attend to personal responsibilities, like doing washing and preparing dinner. This helped them to unlock more recreation time on the weekends.

Interestingly, some framed these activities through the lens of productivity: almost ‘justifying’ them, in that they helped them focus on work.

“The most important thing I’ve gained from working from home is time, which equates to a happier personal life.” - USA3

Spotlight on: Flexible routines

Spotlight on: Flexible routines

Flexible work policies were under-utilised

Many workplaces had flexible work policies in place prior to restrictions, but few workers appeared to have taken advantage of the policy until now.

“The remote working policy was already in place (but) this is the first time I’ve worked from home for an extended period of time.”

– JP5

72%

state they’re granted **some level of flexible work practice** by their employer

43%

had **never, or very rarely, worked from home** prior to restrictions

Flexible work practices are now put into practice

People are using the greater autonomy to balance the needs of both home and work.

Caregivers, in particular, had appreciated the flexibility to respond to emergent needs of dependents.

People without children also appreciated the freedom to attend to home duties - such as cooking and washing - during their week’s ‘micro-moments’. This was seen to provide them more time for leisure outside of work hours.

“I feel less pressure about having to keep ‘office hours’. I met with my son’s teacher today, and I felt OK - I figure the time I missed I’ll just make up this evening.”

– ANZ5

41%

say it’s now **easier to manage work- and home-related demands on their own time**

Nicole's Story

Nicole works as one of four assistants to the directors at an energy supplier. While she works five days a week, she has reduced her weekly hours in order to be able to care for her 6-year-old son.

Prior to the COVID-19 restrictions, she was not allowed to work from home as her role was expected to require physical presence and visibility of the directors' offices. She's now realising those requirements are obsolete.

While she has found concentrating on and completing certain tasks more difficult when working from home, and laments the lack of feedback from her boss, Nicole wants to maintain the flexibility and stress reduction that the 'home office' affords her going forward.

Age: 46

Location: Düsseldorf, Germany

Life situation: Married, one child

“I hope I can steer things in a way that works for me. I have always been quite stressed and worn out at night.”

The thought of going back to normality makes me think of driving that one hour every day that I now had available.

I would want to be more flexible now that my child is starting school. So that I can say: I leave at 2pm, pick up my child at 3pm, but log on for another hour later.”

Spotlight on: Flexible routines

People are taking time out when they need it

People believe there's more freedom to structure their days in ways that reflect their own attention and mood levels.

So long as others are aware, they break when they feel they're in need of refreshment.

Many are making use of the more personalised 'suite' of activities at their disposal, that can help them to maintain motivation. This included exploring the wider community, rekindling old interests, and spending time with loved ones.

"If you feel like drinking a coffee and reading a newspaper for 15 minutes, you just do it - in the office you would have a guilty conscience, because you lean back and it looks like you're relaxing."

- DE3

43%

say it's now **easier to find time to relax and unwind** during the work week

Angelika's Story

Angelika works finance department of a healthcare provider on the West Coast.

Working from home has been truly life changing for Angelika. She recently conducted a 'time accounting' exercise, where she found she had claimed back up to 10 hours a week that would otherwise have been spent on preparation and travel alone.

She's been redistributing this time throughout her day to relax, water her plants, and do house chores.

She has never worked outside of an office but now the thought of it being mandated seems laughable to her. Angelika is hesitantly hopeful she'll get permission to work from home more permanently, but hasn't yet been vocal in her demands.

Age: 42

Location: West Coast, USA

Life situation: Single; living alone

"(When you're on breaks in the office) you're just wondering around wasting time.

Whereas I feel like here, I can take a break and still do something constructive so that when I am done with work for the day, I have time to go exercise or something like that.

I don't know. I just feel like it's given me a lot of free time back."

Spotlight on: Flexible routines

It's hard to align availability

In an office, team members' movements are commonly shared, or implicitly known.

The uptake in asynchronous working has made it challenging for team members to coordinate schedules.

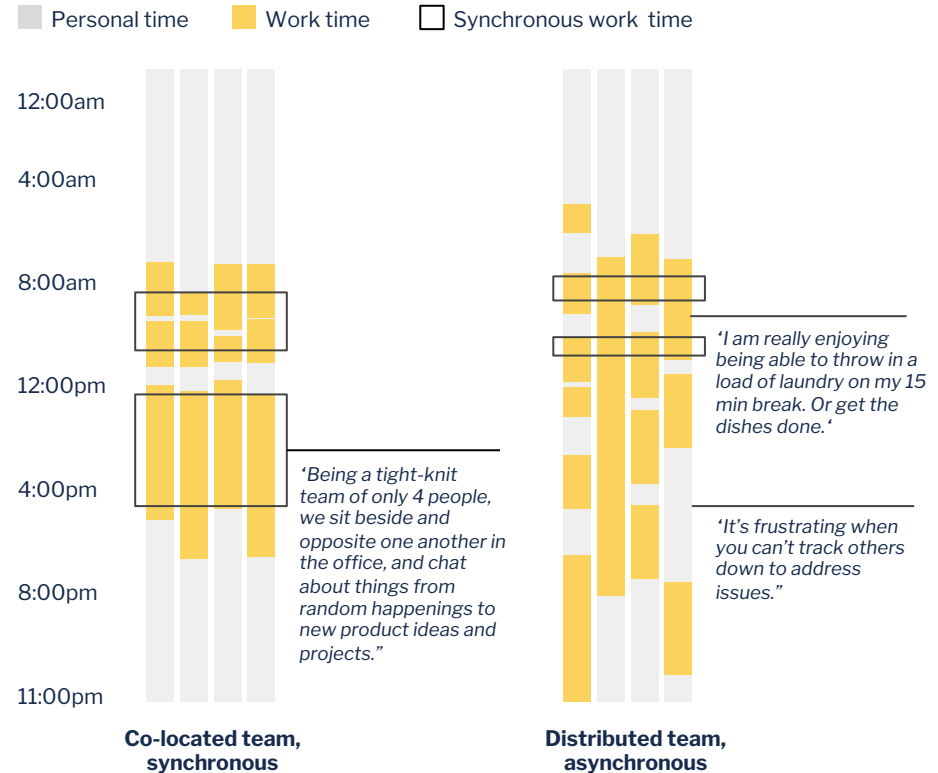
Some lacked confidence in making impromptu requests, for fear of intruding on others' commitments.

They shared how they'd come to abandon requests, or complete tasks independently, rather than disturb others.

"Sometimes it's a bit difficult because I don't know where my manager is, or what he's doing if he's late (to a meeting).

I don't know if it's an appointment that's run over, or if he's just (on his way)."

- DE4



Asynchronous working makes availability ambiguous

Many are organising their work around home responsibilities and personal energy levels.

Teams find it difficult to know who is working when, and whether they're open to unscheduled communications.

They're hesitant to intrude on others' plans, and many simply abandon requests.

Masters of our time

The expectations to begin, break from or finish work at set times have eased.

Outside of planned meetings, most team members were attending to their work at a time most suitable to personal responsibilities and attention levels.

This change was freeing for most, but some found there were 'coordination costs' attached to aligning schedules.

People working independently (because of the nature of their task, or their role) had less frequent experience with this particular challenge.

"(Sitting) close to them, I didn't have to check availabilities before making requests. I could just ask, or turn a blind eye to their busy-ness!"
- JP2

"If I am not available at some point, I am no longer afraid of saying that I have left for a bike ride." - FR5

Blunt tools for availability

Asynchronous working made it difficult for team members to feel confident in others' availability.

Uncertainty was compounded by the 'bluntness' of others' working statuses, and the variation shown across the different platforms teams were using.

People had attached their own interpretation of different icons or colours, which they recognised were not universally shared.

Some workers felt others were using this ambiguity to their advantage - delaying responses while pursuing other activities.

"Jabber gives green, yellow, red. If it's red I won't bother; they're probably presenting."
- USA2

"Some people hide behind (technology) and you can't track them down to address issues."
- AUS3

Hesitant to 'intrude' or assume

People's ambiguous availability made team members hesitant to 'intrude' on others, even when the matter was urgent.

This hesitancy was particularly felt if team members were trying to get the attentions of senior colleagues.

In some instances, this had quite significant consequences such as missed deadlines and disappointed clients.

Some people had taken to completing tasks themselves, where they would typically ask for others' input.

"I don't want to inconvenience them. I'm better off doing it myself. The result is I'm doing more work (and less) specialized work." - JPDS

"You want them to give authorisation but.. if they're with their children, you don't want to be that person who buzzes them." - AUS2

Spotlight on: Coordination costs

Spotlight on: Coordination costs

Coordination costs contribute to longer hours

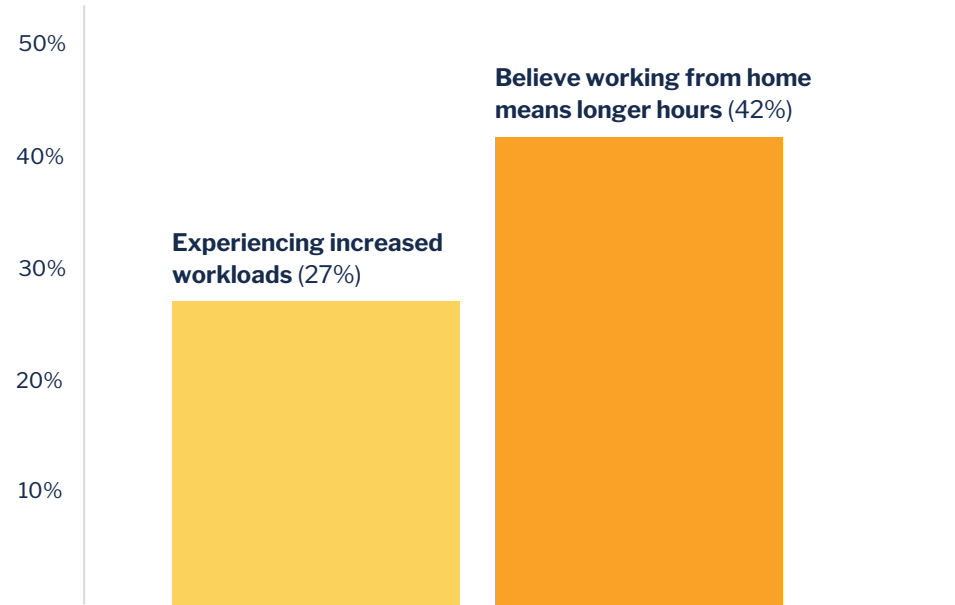
Remote working has added another layer of complexity to people's roles.

References included aligning schedules, planning workflows, documenting work, and becoming familiar with new platforms.

These 'coordination costs' help to explain why many people **(42%)** are spending more time on work, while only some **(27%)** believed their workloads had actually increased.

“The world changed, and for a while we kept using the old tools: email, phone. Now we’re moving to Zoom, My Meeting, Microsoft Teams and the rest.”

- ANZ3



Spotlight on: Coordination costs

More time is spent coordinating schedules

A common coordination costs stems from efforts to align team members' schedules.

Finding appropriate times in the team's schedules is more complex than when people were co-located, shared similar routines and had physical cues for availability.

This complexity may contribute to the increase in time spent coordinating by about half (53%) of survey respondents.

“Coordinating schedules for six people is a challenge. This leads to thinking where, if you have time, you can just coordinate things yourself. The result is I’m doing more work. In some cases, this can keep me from doing more specialised work.”
- JP2

53%

say **more time is spent coordinating** with others via email, SMS, webchat or instant messages

More time is spent coordinating & documenting work

People are spending more time documenting workflows and decisions.

They shared that this is, in part, driven by a desire to make work more accessible to others - as it would be in an office, if work was tacked to walls, or written on whiteboards.

Some were concerned about the additional time this demanded of them and their team.

“My team members now have to write down or phrase a lot of things, because they can't just walk over to me in the morning. It makes things easier in retrospect, because you can retrace things. It also takes more time.”
- DE3

36%

say **more time is now spent monitoring or documenting** progress, decisions or outcomes

Relationships

1

Connection is more intentional, but 'exclusive'

Spotlight on: Collaboration

Spotlight on: Team cohesion

2

People in leadership roles feel ineffective & insecure

Spotlight on: Leadership

3

Privacy concerns make culture harder to foster

Spotlight on: Communication

4

Organisational purpose offsets loss of culture

Spotlight on: Work relationships

5

People are depending on their community for support

Spotlight on: Isolation

Connection is more intentional, but ‘exclusive’

Collaboration had become more intentional.

This encouraged more purposeful participation from carefully chosen ‘invitees’.

But some worry their work’s potential could be limited, if they continue to receive narrow inputs.

More purposeful participation

Most team interactions were intentional, prompted by a calendar invite and an accompanying agenda.

This intention carried a certain formality; an implicit expectation that participants be present and contribute meaningfully.

Some shared that this focus led to very ‘rich’ meetings. But some are experiencing ‘formality fatigue’: missing the relaxed feeling of organic meetings; expediency of decisions made over lunch.

“We’re being forced to be more communicative and connect. I’m not flying by the seat of my pants, so when I speak to people it’s in a focused way.” - ANZ4

“Communication is goal-oriented. There is less social chit-chat compared to (before).” - DE1

“People can’t convey their problem in one message. They wonder how they should say it, if they will be understood.” - JP1

Narrower contributions

Fewer people were invited to attend meetings, in efforts to remain efficient, and reduce ‘noise’ in digital communications.

Invitations to contribute were often sent to a wider group, but most feel this didn’t encourage real involvement.

Notes from meetings were seen to lose the richness or nuance of real-time communication. Recordings were seen as ‘low priority’, and often time-sinks.

This ultimately led to smaller decision-making groups.

“We learned to trim the invites - just have the people on the call who need to be.” - USA4

“(I typically ask for input but now) I finish up documents by myself and submit them.” - JP5

“Many emails go into a (low priority) folder. If it’s important I’ll find out somehow.” - ANZ1

Innovation potential lost

People shared the insulated effects of remote working, where work is documented in less visible forms.

They lamented organic encounters of others’ work, once pinned to walls or left on desks, which made them open to comment and improvement.

Some were concerned that the quality of the team’s work may be threatened, if there continues to be limited perspectives given or gathered.

“At work you might go for a quick coffee - it helps to develop network of people to draw on.” - ANZ4

“(Being there is best because) there might be things that aren’t important in the meeting, but turn out to be important a few days later.” - DE3

“I feel out of touch... not being around (others) to hear what they are working on and.. what I can help them with.” - AUSDS

Spotlight on: Collaboration

Spotlight on: Collaboration

People are spending more time talking with others

The time people spend in meetings with others has increased significantly.

Many suggested that the more frequent meetings were associated with the move to digital, where even short conversations needed to be formalised with a meeting.

Some believed that it was challenging to keep these meetings short as they might have been if they had been held in a hallway, or over lunch.

“Working together has become even more frequent to ensure alignment but also help each other keep their sanity in a time that is (uncertain).” - USADS

51%

are attending **more pre-organised meetings**

49%

are attending **impromptu meetings**

Spotlight on: Collaboration

Team collaboration is more effective

Many people believe the quality of their team's collaboration had improved during remote working.

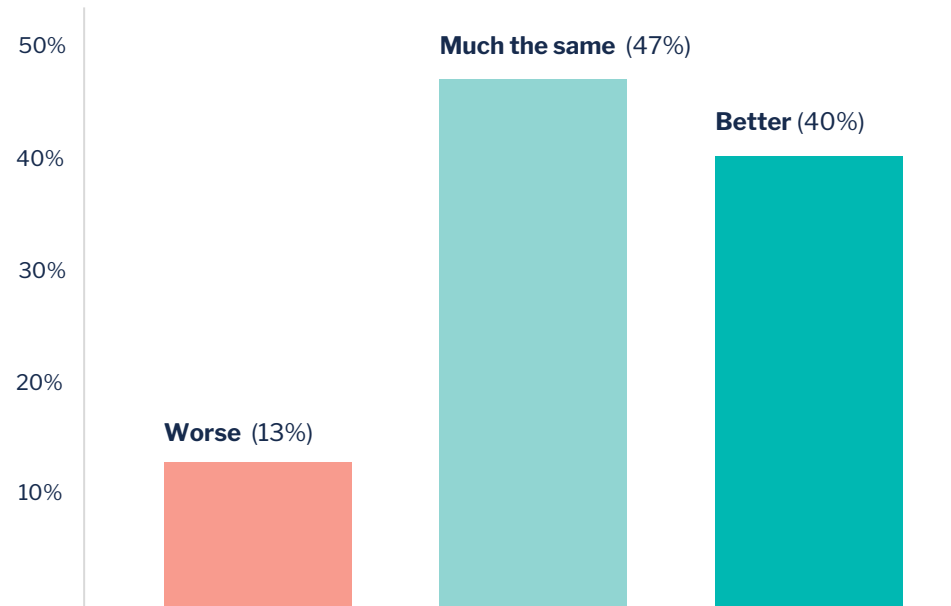
Most attributed this to the clarity of communications demanded in a digital working environment. Others suggested that team sessions had become more purposeful to maximise the alignment of peoples' schedules.

Only 13% believed the quality of their team's collaboration efforts had declined.

"I feel a bit apprehensive about return to normal life! Because we are now in a real flow of working together (that I'd hesitate to give up).

- AUSDS

How well our team works together to achieve



Spotlight on: Collaboration

The experience of remote collaboration is inconsistent

Almost all people believed the quality of their team's collaborative efforts had remained stable, or improved.

There is more variation in people's beliefs about the opportunities to collaborate.

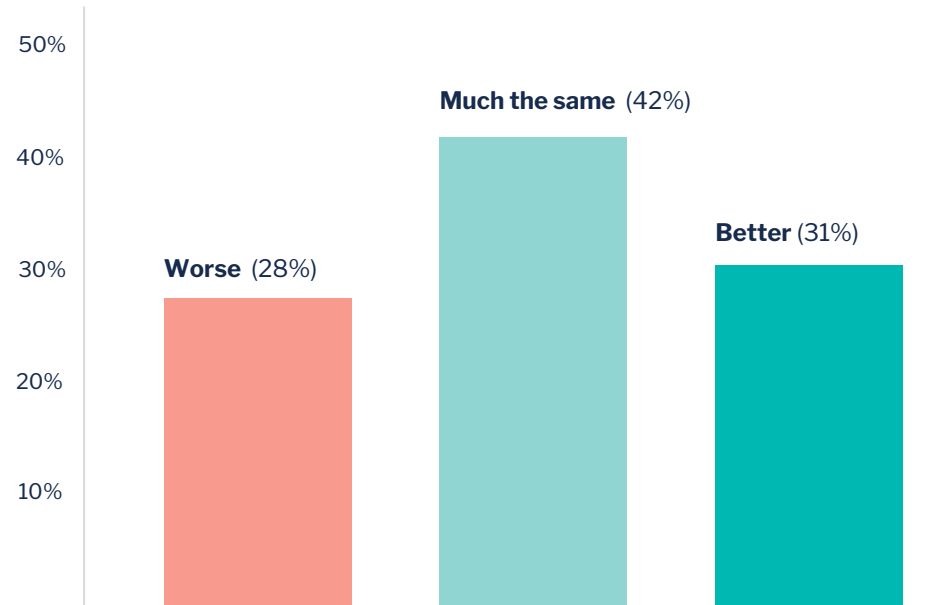
About as many said it had improved, as did say it had worsened.

This demonstrates the challenges of encouraging broader participation in a digital, 'invitation only environments where work is less visible, and therefore less open to spontaneous comment or improvement.

"In the past, I could get another coworker on a different floor to (review our work). I often discussed with them to get the job done. I don't do that now."

– JPDS

Quality of collaboration opportunities



Spotlight on: Team cohesion

Spotlight on: Team cohesion

People are confident in their team’s abilities

Most people are confident in their team’s task and social cohesion.

Measures relating to task cohesion, such as the team’s ‘concentration’ and their ability to ‘pull together’, are particularly strong, with confidence at 69% and 56% respectively.

Tracking these data points over time will also signal team’s resilience to changing work practices as they emerge and become more established.

These measures may also be used to segment teams on the basis of their perceived performance.

“We’re a high performing team, so the world could fall off the cliff but I’d still expect us all to perform at our best.”

- ANZ3

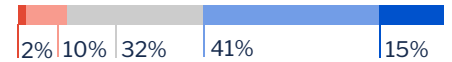
Thinking about the team of people you have worked with this past month, please rate the extent you agree with each statement:

Strongly disagree Disagree Neither Agree Strongly agree

We pull together to accomplish work



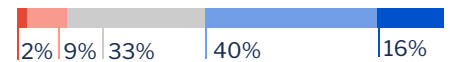
We feel close to each other



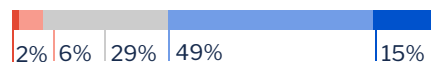
We concentrate on getting things done



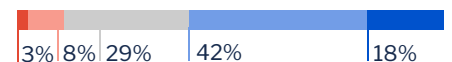
There is a strong feeling of belongingness among team members



We share a focus on our work



There is a feeling of unity and cohesion



Patrick's Story

Patrick works as a Regional Manager for a large telecommunications company. He oversees 13 people, some of whom often work 'on the road'.

He has worked hard to create a welcoming environment for his team during COVID-19 restrictions, as he was worried about some members' mental health. Patrick maintained his weekly hour-long meetings with each team member, as well as daily stand-ups, and emphasised his 'open door' policy.

Patrick could sense some of his team members were struggling to relax on their team calls. He decided to try something new, and assembled an assortment of 'costumes' he could wear each team meeting. He noticed how, in establishing it was safe to be 'unprofessional', others started to become more relaxed: some even started wearing their own wigs!

Age: 53

Location: Chicago, USA

Life situation: Married, grown children

"I don't want to use that term 'loners' but the folks are pretty private. They weren't used to (sharing themselves on video). It was a whole shift culture like that.

(Then I began wearing costumes). I even had my wife's wedding dress, and I'd come in with that on and just pop up to the screen.

Now it's pretty much everyone used video. I think it's gotten people comfortable with it."

People in leadership roles feel ineffective & insecure

People find it difficult to build and maintain relationships while working remotely.

This impacts not only organisational culture, but also the job satisfaction of those in roles that depend on 'relationship health' for work success.

Difficult to build, maintain relationships

People in roles that require high levels of social interaction are struggling to feel successful in their work.

They felt the intentionality of communications hurt their ability to build relationships organically.

They also felt the loss of 'soft signals' limited their ability to read others, and respond appropriately.

These people were more likely to say their roles were not appropriate for remote working.

"(A lot of my role depends on) my character & vibe. But it's hard to present when there is no response." - JP5

"Aura is important. Making jokes to a camera is different. It's more difficult." - DE5

Relationship-based roles feel insecure

People believe that organisations are undertaking wide-spread evaluations of business units and roles.

Broadly speaking, those without the 'tools' to perform are feeling frustrated that they're not given the chance to put their best foot forward.

People in leadership roles, that depend on relationship 'health' for their success, are particularly worried. They have felt a need to demonstrate their worth by becoming more involved with their team, and documenting project successes.

"We'll see the biggest restructuring we've ever seen. Anyone who's non-essential is thinking that's not a good rating to be in." - AUSDS

"There's two ways to look at job security. They're not afraid to make cuts but they kept me. So I'm good enough to retain right?" - USA5

Sharing emotional maintenance

Those in relationship-based roles are feeling self-conscious about the value they can bring in an online environment.

Perhaps ironically, many are desperate for connections with those who are emotionally intelligent but they aren't looking to those in relationship-based roles for support.

It appears women are often looked to provide a listening ear. It was unclear whether this was a new trend, or if women were typically responsible for this emotional labour.

"I am the Zen person on the team and act as the 'complaints office'. I received a lot of calls from colleagues under pressure. I had to take all these negative waves and try to appease them." - FR4

"I've been talking with some team members. Listening to those in the team who live alone - a real eye opener around loneliness." - ANZ5

Spotlight on: Leadership

Spotlight on: Leadership

Workers have been satisfied with management's response

The quality of an organisation's response to the restrictions has had a marked effect on their employee's evaluation of leadership.

Around two-fifths of people state their satisfaction with leadership has increased (41%), and another two-fifths (43%) have more trust in their organisations than before.

This may contribute to an increase in organisational loyalty, evident among one third (39%) of respondents.

“The HR department looked at the employees who would be most affected by the situation - parents and singles who lose their social life - and made sure these new ways of working were socially responsible.”

- DE1

How have the following changed compared to before COVID-19 restrictions?

Trust company to do the right thing by employees



Satisfaction with work-life balance



Satisfaction with job



- Much worse
- Worse
- Much the same
- Better
- Much better

Megan's Story

Megan is a Financial Advisor at a leading institution with multiple offices across the United States. She has been with the company for almost 15 years.

She is quick to establish that, unlike many competitors and, perhaps, the wider industry, her company truly lives their values of customer- and employee-centricity. This is true even in challenging times such as these, and financial recession in times gone past.

Megan admits she's never felt a strong connection to her team, who she hesitantly describes as 'a bit of boys club'. But her strong sense of belonging to the company-at-large has been a strong motivator in her remote working experience.

Age: 35

Location: East Coast, USA

Life situation: Single, home owner

“We have a bad rap, our industry (but my company is different). They have a lot of resources that they want to provide to their employees so that they can take care of themselves first, then their clients.”

Health insurance, workplace assistance programmes, wellbeing apps, diverse affinity groups, training. And they educate us about how to take advantage of them all.”

Privacy concerns make culture harder to foster

People are hesitant to ‘publish’ their thoughts in an environment where communications are more permanent.

Many have created their own channels for informal or ‘inappropriate’ content, to avoid ongoing analysis or scrutiny.

More time curating communications

It is more difficult for people to convey nuance, or set tone, in a digital environment.

This made people feel their communications were more open to misinterpretation.

Written communications are seen as particularly ‘high risk’ in that they are entirely one-dimensional.

People were spending more time crafting their communications to ensure they conveyed the intended message, but few found confidence they were wholly aligned.

“As a manager, when I need to coordinate complicated things, words alone may be insufficient to convey my meaning. If I’m not careful, people might take my words as cold or as an admonishment.” - JP1

Self-censorship prompting concerns

People were concerned that their written and verbal communications may be seen (among other things) as ‘unintelligent’ or ‘unprofessional’. The recording and suspected surveillance of digital interactions prompted some workers to self-censor, because they felt their contributions would be open to ongoing analysis or scrutiny.

Some managers felt peoples’ worry about how they could be perceived (for example, in sharing difficulties) was leading to lower interactions overall.

“I’m (more reserved), never 100% myself because this is all being recorded.” - AUS5

“Someone might give up on trying to write me (manager) a message. That’s what I heard.” - JP1

“I get a little nervous because it seems like only the good things are being reported to me.” - JP3

Culture forming in covert channels

Team members sought ‘safe places’ to share their uncensored thoughts and feelings. Often, this meant redirecting communications to platforms outside of the company-owned channels, like social media or text.

This behaviour signals the tightening bonds of teams, and the weakening connections to wider colleagues.

While people recognised these as ‘gated communities’, few shared concerns about their ‘exclusivity’.

“Sometimes we’ll start an informal discussion on Skype and we’ll switch to Snapchat or Whatsapp to feel more secure sharing information.” - FR2

“(Work chat) we do via email with everybody, (but text when we want) to talk non-work related or inappropriate things.” - USA5

Spotlight on: Communication

Spotlight on: Communication

Communication is more intentional, formal

Participants shared how many communications had formalised. They attributed this namely to the increased reliance on written communications, which may be more easily misinterpreted.

Some also shared that the permanence of these communications may leave them open to ongoing scrutiny, or analysis.

This formality was described by almost half (46%) of survey respondents, who believe it has become more important to communicate effectively since the shift to remote work.

“Once something is written, that ‘log’ remains, so I try to avoid saying anything that might come across as too critical or could run afoul of compliance policies.”

– JP2

46% believe it is now more important to **effectively communicate** with others

Organisational purpose offsets loss of social interactions

Teams are becoming more intimate, but connections to other colleagues are weakening.

Those with a strong sense of purpose in their work are less affected by the erosion of company culture.

Wider connections are under threat

High levels of contact helped most teams to sustain, and even enhance, their team cohesion.

However, people had fewer opportunities to connect with other colleagues, and few had made efforts to maintain these relationships.

In fact, some had begun to see these connections as 'superfluous' to work and, in some cases, superficial in nature.

"Seeing each other every day forced us to have social relationships. If there wasn't any work, we would not really be friends. It's weird to realize that." - FR2

"I try to (be social with them); text them on their birthday; say 'Happy Father's day, have a good weekend' or whatever. I would never get it back. But that's okay... That shows their true colors." - USA1

Attempts to connect are low, unfulfilling

Organisations' attempts to promote cross-team connections have been weak.

Most have simply 'lifted and shifted' rituals once held in-office, such as evening drinks and team-building exercises. Others had taken to adding more 'human' elements to their intranets.

Some had made no efforts at all.

People found these activities unfulfilling, awkward, and ultimately unnecessary (especially as digital fatigue set in).

"All the affinity group stuff has been put on hold & I don't get from a Zoom drinks what I really want to get from a Friday night drinks." - AUS4

"I get tired of seeing people face-to-face everyday. (Remote) gives everyone some breathing space." - JP3

Purpose an enduring force

People with strong purpose in their work were less affected by the loss of workplace culture.

Strong alignment between their work activities, and the goals of their company or team, helped to offset the lost motivation once gained from social interactions.

Purpose-driven people were less desperate to return to co-location; more likely to desire further remote working.

"I believe that we are working to make things better for children around the world... So truly, 3 years from now, I hope to be right here working from this desk in this apartment with this bright sunny window. and all my plants." - USA3

"If I'm working on a project that really fascinates me - then the motivation will be there [no matter where I am or who's around]." - FR1

Spotlight on: Work Relationships

Spotlight on: Work relationships

People know work relationships now require more effort

The office experience provides organic opportunities for people to build and maintain relationships.

People recognise the importance of making conscious efforts to connect with colleagues.

Almost half of survey respondents believed it had become more important to act with care and empathy for their colleagues (44%), and to have a clearer understanding of their needs (40%).

“We used to only have one or two team meetings per month but now we have one per day, and it brings the team closer together.”

– FR5

How has the importance of certain work-related skills changed during COVID-19 restrictions?

Act with empathy and care for others



Develop trusting relationships with others



Create good rapport with others



Understand what others are feeling +



Effectively communicate with others



Spotlight on: Work relationships

Workplace social connections are harder to form and maintain

It is now more important for people to make efforts to connect with colleagues.

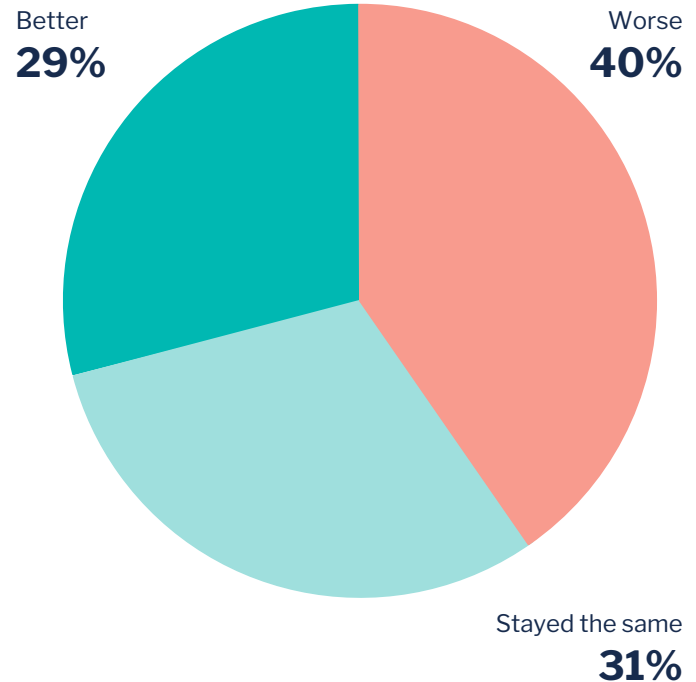
Unfortunately, many found it difficult to realise their intentions. People find there are less opportunities to socialise. Those that remain are often unfulfilling.

This 'thinning out' of workplace connections has many workers feeling disconnected. Others have recognised these 'weak ties' as superfluous to work, and are glad for the change.

"We used to do morning teas, work drinks, coffee. You see everyone every day, even in small moments. I do miss it."

- AUS1

Quality of social interactions



Spotlight on: Work relationships

Workers expect organisations to provide better quality social interactions

Many have lost valuable channels to connect with their colleagues. Some are looking to their organisations to provide better opportunities.

Almost a third (31%) of people who said their company was unprepared to support remote workers believe that their companies would need to focus more efforts on providing opportunities to socialise with their colleagues.

“We’re a relatively new team, and I had only spent time with one of the members for a week before (going home).”
- ANZ5

31%

believe their company would need to provide **better opportunities to socialise***

*of people who said their organisations were unprepared for remote working

People are depending on their community for support

With limited access to personal and workplace networks, many workers are feeling isolated.

They have come to lean more heavily on their local surrounds, to provide a sense of connection and 'normality'.

Community networks missed

Peoples' access to personal networks was limited during restrictions.

Most participants felt deprived of a much-needed (mental or physical) 'third space' to unwind from their personal or professional responsibilities.

Those who relied on these networks for a sense of belonging (such as church groups, interest groups) were hardest hit.

Some network groups had worked to 'digitise', but most had temporarily abandoned their offering.

"As it's worship day, I attended online (Baptist) church. It is food for the soul. I now feel refreshed ready for the day." - AUSDS

"I miss going out, playing a lot of soccer - these are the things that keeps me busy." - ANZ1

Finding (shallow) social connections

People found their lack of social connection weighed on their wellbeing.

Those in simple households, in roles that required low levels of social interaction, or in countries that still had strict restrictions felt the most isolated.

People shared their efforts to connect with others in real life - even if for a fleeting moment.

They found these interactions reassuring (as a reminder of 'normal life') but recognised them as shallow.

"Since I live alone, I haven't touched anyone for 4 months. Isn't it crazy to think that I haven't touched anyone for one-third of the year?" - JP5

"Mondays I put my garbage out. If my neighbor is out we will talk for a few minutes." - USDS

Exploring community infrastructure

With fewer social opportunities available, workers are finding new ways to recreate and delineate from work.

A large number of participants had come to rely on their community's infrastructure for support. Frequenting of local parks, or local cafes, were commonly shared.

Notably, many people were exploring areas previously unutilised, or relatively unknown to them.

Workers increased reliance on their surrounds signals the importance of community health in remote experience.

"I've been doing my best to walk (my local cemetery & park). It's beautiful and peaceful and has a perimeter of 5 miles. It's my current happy place outside of my apartment." - USA3

Spotlight on: Isolation

Spotlight on: Isolation

Low quality interactions lead to loneliness

Connection to others is a core pillar of wellbeing, and the office experience can help to fulfill this need for many people.

Unfortunately, restrictions have disrupted this source of connection - and many others. Most people (40%) believe the quality of their social interactions - both work and personal - had worsened.

People shared concerns for those living alone, who may rely on their colleagues for social interaction.

“Some found themselves very isolated and have been suffering psychologically. They wanted to do more (work) to forget the loneliness. For them, the virtual meetings were vital.”

- FR2

40%

believe the **quality of all their social interactions had worsened** since working remotely

People need emotional support

People understand the challenges of remote working, and restrictions at large have impacted many people's wellbeing. Most (45%) people said it was more important now, to act with empathy and care towards their colleagues.

Managers played an active role in establishing forums for colleagues to connect, and share their troubles. Many had come to demonstrate greater vulnerability themselves, to create a safe environment.

“Listening to those in the team who live alone - it's a real eye opener around loneliness.”

- ANZ

Of the people who said they were unprepared to work from home...

14%

believed **they would need emotional and mental health support** in order to continue remote working

Of the people who said their team was unprepared to work from home...

26%

believed **others would need emotional and mental health support** in order to continue remote working.

Karl's Story

Karl manages a large team of engineers in Germany.

He struggled with the restrictions in many ways, but the greatest loss was felt in being removed from his beloved bodybuilding scene.

He'd come to know many people from the community intimately, but without their common activity to congregate around, Karl had fewer opportunities to connect. Gym closures also meant Karl couldn't work out in the way his body was accustomed. He looked at replacement activities, such as biking, but felt they didn't give him the same release.

These losses caused Karl to develop severe anxiety, and he suffered panic attacks for the first time in his life. Now that the gyms are back open, Karl feels he's on the path back to normality.

Age: 33

Location: Dusseldorf, Germany

Life situation: Lives with partner, owns

“I couldn't go to the gym for 10 weeks and had two breakdowns at home. My nerves - they were in pieces.

When you're used to doing sport 4-5 times a week and then can't do that anymore, it hurts you in a physical and a mental way.

I went running and rode my bike, but that's not bodybuilding. I looked at ordering equipment online, but it costs 2000-3000 Euros and would only be delivered in August.

Since the gyms have reopened I've flourished again.”

Workplaces

1

People are looking to make their homes 'work-fit'

Spotlight on: Home offices

2

Organisations have far less control over the work experience

Spotlight on: WFH experiences

3

People realise a return to 'normal' will not be so normal, afterall

Spotlight on: Workplace preference

Spotlight on: Preference support

Spotlight on: Remote readiness

Spotlight on: Office appeal

People are looking to make their homes ‘work fit’

People recognise their temporary remote working spaces may not be fit for the longer term.

Some are looking for ways to upgrade their existing spaces, while others consider moving to a more appropriate space.

More pressures on the home

People knew how to organise their home to support home life. Now the home is expected to support work too.

This has seen kitchen benches made into desks; cook books into laptop stands; and spare bedrooms into co-working spaces.

These ‘fixes’ represent the sacrifices people are making to their homes: often giving up spaces and resources once used for ‘living’ to sustain work.

Some are beginning to resent the ways work is ‘colonising’ the home.

“Can’t believe I called it a kitchen desk.” - AUS2

“It is my home and I don’t really want anything to do with work here.” - DEDS

“(It was hard for us). But moving to the garage changed the pressure on the house.” - FR5

Wanting to make home more ‘work-fit’

People are considering ways to make their existing homes more ‘work appropriate’.

References ranged from installing better internet to converting ‘dormant’ spaces.

People are hesitant to invest time and money until they have more certainty around their company’s plans. They were commonly deprived of these assurances.

“What was the most difficult? It would be technical issues. Sometimes I realise I can’t do a certain thing from home and have to drive to the office, which is annoying.” - DE3

“We have a basement I could add to to create more space (which would help me be) better prepared if this happens again.” - USA4

Imagining new home opportunities

People’s decisions on where to buy and rent depended on proximity to their office. Some people are beginning to wonder about the potential value of moving, if remote work continues.

People who had strong connections to a distant ‘home’ were excited by the prospect of returning. Others simply sought greener pastures (quite literally, with many references to rural areas).

Perhaps unsurprisingly, those with stronger connections to their communities (socially, culturally) were less likely to find the concept appealing.

“If work from home can be an option, I can possibly buy a bigger block for the same price (as my current apartment).” - AUS1

“Georgia is my home, though. Unless God has other plans, I’ll be here until I die.” - USADS

Spotlight on: Home offices

Spotlight on: Home offices

Home is not built for work

Remote working has placed many new demands on workers, none more obvious than their responsibility to manage their own offices.

Some workers have struggled to develop a functional working space: a little over a quarter (29%) say their systems don't function as well; a third (34%) believe their space is less comfortable.

The longer term impacts are now being considered. Almost half (49%) believe they'd need to improve their workspace, if they were to continue working remotely.

"You spend more time here, so you re-experience your apartment. You have some renovation ideas here and there that weren't a priority beforehand." – DE3

29%

say their devices, software or **systems don't function as well**

34%

say their workspace at home is **less comfortable and ergonomic**

Of people who said they were unprepared to work from home...

49%

would **need to have a better working space** if they were to continue working remotely

People are curious about 'what next'

People recognise that working remotely means they are no longer bound to need a home in close proximity to their company's office.

The prospect of remote working becoming a more plausible work practice has many imagining new home opportunities.

Half of survey respondents were thinking expansively about where their next home might be.

"This might open up the opportunity for me to spend at least few months a year working from 'home' in Sri Lanka with my family. A world of endless opportunities opens up with remote working!"

- AUS1

50%

are curious where they could live if they no longer needed to live in neighborhoods convenient to their work

Organisations have far less control over the work experience

Worker success and satisfaction now depends on many factors, reaching far beyond their workspace, and into their household dynamics and social circles.

Many workers are beginning to expect more nuanced supports from their organisations.

Atomisation of 'the office'

Organisations now have as many offices as they do employees, making workers responsible for their own workspaces.

This has placed new demands on workers in that they are expected to be proficient in a number of areas that previously sat outside of their job descriptions.

By necessity, they have become their own:

- interior designers
- facility managers
- task and workflow managers
- tech support

"My workspace has a professional monitor and multifunction printer. I also have a separate mouse and keyboard and reliable internet. The workstation has lighting, a designer leather chair and stylish draws for storage." - AUS5

Workers' complex needs

The quality of a workers' space is no longer a dominant driver for success.

New factors are now impacting workers' ability to do 'good work' in significant ways. And they stretch far beyond a singular space, and into peoples' social spheres and community infrastructure:

- Responsibilities to others
- Size of house & household structure
- Network quality
- Community 'health'

Notably, many of these factors aren't able to be changed easily and/or sit outside of workers' direct control - much less that of their organisation's.

Rather, workers are expressing need for new supports to help them manage.

"Two weeks ago I was alone at home for the first time. And I was like: I can actually do work. It was very different." - DE4

Expecting more tailored supports

Workers' success and satisfaction is dependent on many new factors. People are expecting organisations to expand their supports in response.

Those assuming they'll work remotely on a semi-permanent basis believe their organisations should redistribute finances once spent on rent to workers.

References to allowances (spent either on 'hard costs', or at the discretion of workers themselves) were also made.

"When I calculate how many square meters (in the office) and the costs involved... It's fair to say: buy whatever you need." - DE3

"(We got) face masks & sanitisers but no extra allowances for working from home." - JP5

"(Providing monitors & things are expected, but) I don't believe they'll pay a stipend." - USADS

Spotlight on: Working from home experiences

Spotlight on: WFH experiences

There is diversity in the home experience

The factors influencing remote work experience are infinitely complex.

This complexity creates diversity of experience felt across a single organisation's workforce.

Diversity of experience can be demonstrated through workers' evaluation of remote working, in comparison to office working.

Notably, about as many workers say their working experience has improved since working remotely, as to say it's unchanged, or has worsened.

How different is your working from home environment compared to your usual office environment?

■ Much worse
 ■ Worse
 ■ Stayed the same
 ■ Better
 ■ Much better

Level of personal distractions during the day



Workspace atmosphere and ambience



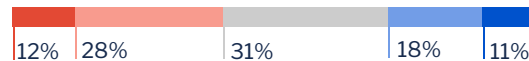
Level of work distractions during your day



Workplace comfort and ergonomics



Quality of social interaction



Workspace functionality (devices, software, etc.)



Effectiveness of collaborative opportunities



Internet quality



Spotlight on: WFH experiences

People have different needs with WFH

The success and satisfaction of remote workers depends on a multitude of factors.

Some needs, such as role clarity and training, are easily fulfilled by organisations.

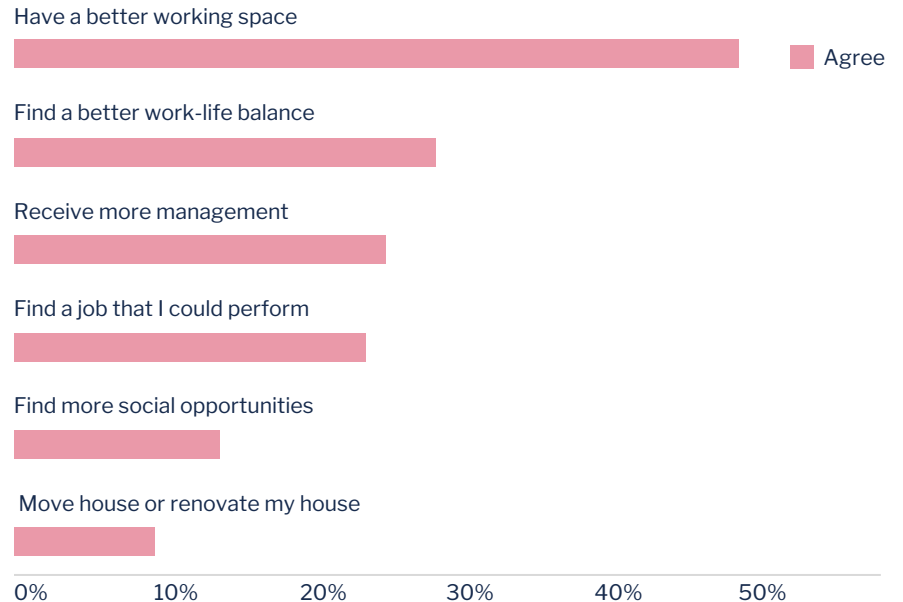
Many others sit outside of an organisation's typical responsibilities, such as a workers' need for social supports; support for care duties.

This demonstrates the expanding needs of workers and, in time, the changes to expectations of organisations.

“We are not machines, everyone works differently. Working from home permanently isn't a solution for everyone. It reflects the different personalities of people. But I think an employer can work with that.”

- DE3

Of people who said they were unprepared to work from home, **in order to continue working remotely, people would need to:**



People realise a return to ‘normal’ will not be so normal, after all

Most people expect their organisations to reopen offices, while maintaining flexible work practices.

The new office experience is associated with higher coordination costs (in efforts to include remote workers); fewer opportunities for quality social interactions.

Expecting some degree of remote

People felt the case for remote working had been proven, and that their organisations would introduce flexible work practices - but they did not expect them to be universally given.

Proof of effectiveness while remote was the main criteria referenced.

People also expected those with significant commute times, or high care responsibilities, to be given more consideration.

“They say it’s going to be a case-by-case basis. They might agree for me, but others - you don’t really trust them to work productively.” - AUS1

“I can imagine that there will be a rethink. We have seen that everything can be done from home without any problems, just like what we did in the office before.” - DE2

Hybrid working adds coordination cost

People are expecting new challenges, if or when their organisations operate a ‘hybrid model’.

Most believe there will be increased ‘coordination costs’: needing to be more fastidious in their documentation & sharing of work resources, conversations.

People also expected remote workers to be excluded from the more ‘natural’ team bonding that occurs in-office.

Some managers believed their jobs would become more difficult, in managing disparate needs of their team evenly.

“(A core challenge would be) to lead the team fairly. To not favor anyone. Those you work with directly and those (at home).” - DE5

“(I imagine) lots more documentation, lots of work getting missed.” - AUS6

OH&S impacts office experience

People recognise that the office environment has changed, or will change, in response to COVID-19.

Those who had returned to office were exposed to new health and safety practices that limited much of the appeal.

For example, people couldn’t interact freely due to physical distancing; expressions were hidden by masks; and meeting rooms had limited capacity.

‘Remote preferred’ workers were more likely to use these changes as justification for continuing remote work.

“Using Facetime even while in the office.” - JP3”

“Operations are planning full plexiglass (on desks & reception) and that’s kind of weird and distancing. I wonder if we will be able to offer coffee to guests anymore, too.” - USA1

Spotlight on: Workplace preference

Spotlight on: Workplace preference

Remote or hybrid work suits many people

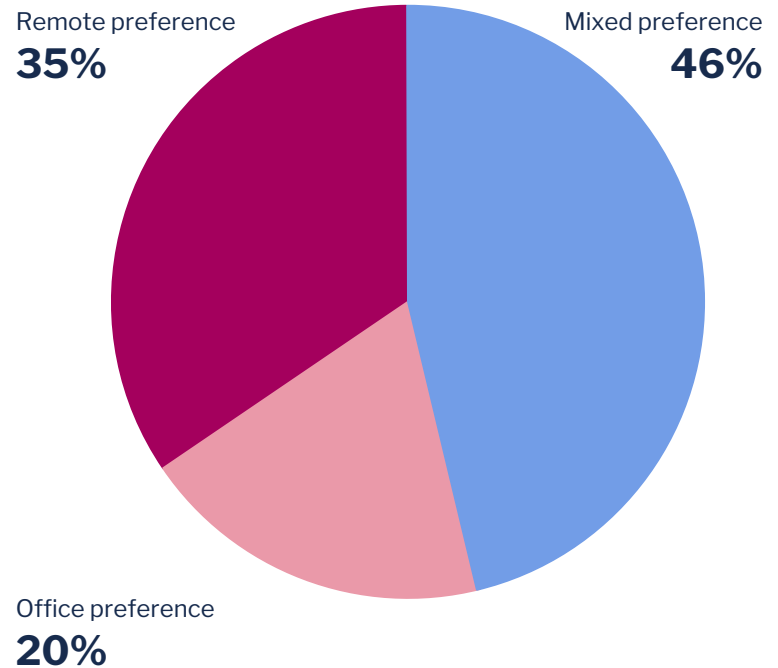
The majority of people want to continue remote working to some degree.

Most people (46%) want to work at a mixture of home and office. The most common preference (69%) was to spend between 2 and 3 days in the office.

Only one-fifth (20%) of people want to abandon remote working in full, and return to full-time office work.

“As I gradually get older, commuting to work has become a chore. Where I live, the trains are always crowded. I hope that changes can be made (to accommodate people like me).”

- JPDS



Vanessa's Story

Vanessa is a corporate accountant in a credit and travel management team. With some of her colleagues leaving the company in response to COVID-19, she has taken on new responsibilities and now performs more of a managerial role.

She lives alone, and enjoys her independence. While Vanessa's personal preference as an individual employee is to spend the majority of her work week from home, she wants to be present in the office more frequently once promoted to manager.

She anticipates she will feel a strong responsibility for her colleagues and believes they will be more comfortable to discuss issues with her in person than via Skype.

Age: 31

Location: Cologne, Germany

Life situation: Single renting

“As a supervisor I should simply be present in the company. I look after my department and I want to show other departments that I always have an ear for my colleagues. I would allow my colleagues to always work from home with prior arrangements.”

Missy's Story

Missy works in sales for a leading health insurance provider. While the members of her team work independently, they are close-knit.

Her company has always promoted flexible work practices, but she never saw herself as 'the type' to work from home. She loves the hum of the office, and having access to the city's cafes and restaurants.

But, to her surprise, she has found herself dreaming up ways to establish a more permanent office in her apartment. She imagines she'll still spend a lot of her time visiting existing and prospective clients, but use her home as 'basecamp'. The office will most likely be reserved for team meetings, training and Friday drinks.

Age: 29

Location: Sydney, Australia

Life situation: Married, homeowner

"I've realised I like working away from the office environment. I find I actually get more distracted by my colleagues as you get drawn into all their issues and I can focus a lot better at home.

I'm actually feeling anxious about returning to normal. Not looking forward to returning to the office at all. I like seeing my team but am quite happy doing that on a social basis instead at the moment."

Spotlight on: Workplace preference

People have a strong preference for WFH

People who want to continue remote working appear more steadfast in their intentions than those who want to return to office.

Over two-fifths (43%) of 'remote preferred' people said nothing could influence their decision, compared to just a quarter (26%) of 'office preferred' counterparts.

“The thought of walking into a windowless, fluorescent-lit, freezing, ugly, cold cubicle, and spending half my life in there, is depressing. I honestly didn't know how much more happiness (remote) would bring to my life.”

- USADS

I would change my stated preference if the following conditions or restrictions were true (remote preference only)

None of these conditions or restrictions would make me change my stated preference



Most people in my team decided to work from the office



Most people in my company decided to work from the office



I had to equip my home office at my own expense



If I couldn't claim back expenses



Spotlight on: Preference support

Spotlight on: Preference support

People lack confidence they'll be supported

Most people appear unsure as to whether their company will support their preferences.

A third (33%) state it is 'neither likely or unlikely' that their company will support their preference.

A quarter (27%) are not hopeful their company will support them.

Many workers expressed frustration that their organisations may not support remote working, despite demonstrating their capability to do so.

"I think they're taking it on a case by case approach. Maybe they'll trial it in different corporate offices. It will be interesting to see who goes back."

- USADS

What's the likelihood that your company will support your work location preference?

Very likely



Likely



Neither likely nor unlikely



Unlikely



Very unlikely



Spotlight on: Remote readiness

Spotlight on: Remote readiness

Organisations, teams & people are remote ready

People were asked whether they believed they, their team and their organisation were prepared to manage remote working on a permanent basis.

Most people were confident in each cohort's readiness but, interestingly, they had the lowest confidence in their organisations, and the strongest confidence in themselves.

This suggests people feel as though organisations are the slowest to adapt, and pose the biggest barrier to new work practices being implemented.

"I don't believe in the old school mentality of being chained to a work desk. In this age of increased technological tool sets, people can work remotely and still do a sterling job."

- AUSDS

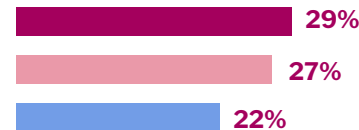
Your workplace has mandated 'work from home' for all company employees. This is a permanent change, beginning immediately. **How prepared are you, your team or your organisation to permanently work from home?**

■ Organisation ■ Team ■ Individual

Prepared



Unprepared



0% 20% 40% 60% 80%

Spotlight on: Remote readiness

Are the biggest barriers the simplest solves?

People were asked why they believed they, their team or their organisation were unprepared for continued remote working.

The most common answers given for each cohort all centered on more functional aspects of working that are, perhaps, comparatively 'simple solves'.

For example, of those who believed their team was unprepared for continued remote working, wanted ways to work better together, rather than ways to distribute their workload.

"The system for remote work isn't well-established. We're only provided a tablet. It's slow to load. I can drink a cup of coffee while waiting for it to open."

- JPDS

Of those who believe their organisation is unprepared for permanent remote working...

58%

believed their organisations would need to provide better tech, systems and tools.

Comparatively, only 13% said their organisation would need to find different leadership.

Of those who believe their team is unprepared for permanent remote working...

54%

believed their team would need to find new tools to better collaborate.

Comparatively, only 17% said their team would need to increase in size.

Of those who believe they are unprepared for permanent remote working...

49%

believed they would need to have a better workspace.

Comparatively, only 8% said they would need extra support to manage their care and/or domestic duties.

Spotlight on: Office appeal

Spotlight on: Office appeal

Loss of connection limits the office's appeal

People see the office as a great place to create and strengthen bonds with workmates.

The appeal of the office declines sharply when they consider the increase in flexible work practices (impacting the number of people in office) and introduction of health and safety practices (limiting social interactions).

Roughly a third of 'office referenced' people stated they would work remotely if their offices enforced stringent health and safety practices; if most others decided to work from home.

"It would be strange working with coworkers if we are afraid to get too close or have to wear masks around each other. Just seems to impersonal. I'd rather see facial expressions on video."

– USADS

I would change my stated preference if the following conditions or restrictions were true. (office preference only)

If physical distancing was enforced



If most people in my company decided to work from home



If masks were required to be worn



If in person meetings were not permitted



If most people in my team decided to work from home



None of these conditions or restrictions would make me change my stated preference



Spotlight on: Office appeal

The office becomes less appealing if no-one's there

People believed being part of a hybrid team would complicate their workflow.

They believed that those in-office would need to maintain remote working practices for the benefit of their at-home members.

These coordination costs appear off-putting for some, with a third stating they would change their office preference, if others were remote.

"I think that such a way of working would not be a big challenge for us. You still have constant contact through email, phone, zoom."

– DEDES

33% of **'office preferred' people** would change their mind if most workers were remote

People miss the connections of old

Three-fifths (60%) of people surveyed had returned to the office at some point since remote working was enforced.

Comparing the office experience with that prior to restrictions, people had witnessed significant changes.

Over a quarter of people believed the quality of social interactions had worsened. Qualitative data suggests this could be attributable to the health and safety measures in place.

"I'm in my usual cubicle with a couple of guys sitting nearby, but we're socially distanced & wearing masks. We have to follow guidelines if we're in common areas, such as bathrooms & dining areas."

– USADS

34% of people who'd returned to office believed **the quality of social interactions had worsened** when compared with their pre-remote experience

What's driving differences?

Experience Factors

What determines how well people adapt?

To gain a deeper understanding of how people's experiences of work and the workplace has changed due to COVID-19, there are three major factors to consider: Household complexity, Role complexity, and Network quality.

While people may share similar challenges or circumstances, a person's experience can be better understood by examining the relationship between all three factors, and how each has been affected by the shift to remote work.

The experience factors model identifies the key areas of work and home-life that have changed, and the challenges that have emerged as a result.

Understanding the relationship between a person's household circumstances, role requirements, and broader network connections provides insight into their experience of work, and their anticipated needs from an organisation.

Where a person is placed on each of the experience factors can and will change over time. For example, a person's household complexity is likely to change as their household dynamic evolves: children moving out of home; housemates moving out; or moving to a new house.

These changing dynamics influence a person's physical working environment, level of care responsibilities, and personal support structures. When understood in tandem with that person's role complexity and network quality, a holistic experience can be derived.

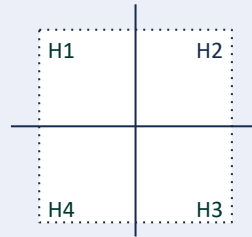
Using the Experience Factors

- Work is no longer confined to a controlled environment, making it ever important for organisations to understand people's entire experiences of remote working.
- We have used the Experience Factor Model to map our qualitative research and draw out circumstantial change as a result of COVID-19, creating a repeatable process for organisations and employees to better examine and articulate their current experiences.
- While focused on the implications that these changes have made to people's work practices, attitudes and behaviours, it is necessary to map all influencing changes occurring in a person's COVID-19 experience - changes in the home, their work role and the wider community.
- Each of these Experience Factors can be examined individually, however, each make up one part of a person's experience and should be viewed together.
- As circumstances change, so will a person's experience. The Experience Factors can be used to understand a person's changing needs over time.

A clearer picture of a person's experience

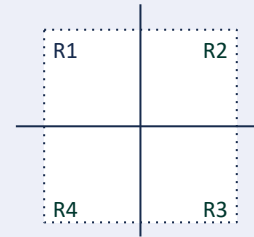
A person's experience of working remotely can be mapped across three critical factors. Though evaluated individually, it is important to look at these three factors alongside each other to understand the full picture of a person's remote working experience.

HOUSEHOLD COMPLEXITY



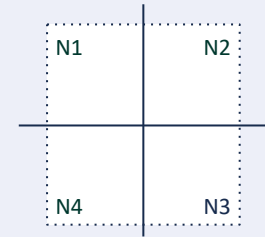
H1: High care, low intensity
H2: High care, high intensity
H3: Low care, high intensity
H4: Low care, low intensity

ROLE COMPLEXITY



R1: Complex workflow, low social interaction
R2: Complex workflow, high social interaction
R3: Simple workflow, high social interaction
R4: Simple workflow, low social interaction

NETWORK QUALITY



N1: High community, low workplace network
N2: High community, high workplace network
N3: Low community, high workplace network
N4: Low community, low workplace network

CURRENT EXPERIENCE

Using the frameworks to identify supports

The lens framework and experience factors provide greater insight into what COVID-19 has changed in the workplace and home, and how people are adapting to these changes.

From these frameworks, a range of **employee needs** have emerged. These needs can be categorised through the four lens categories; identity, time, relationships and workplaces.

Within each category, recommended support types capture the opportunity areas explored in each of the experience factor quadrants.

Lens	Support type	
IDENTITY	Clarity and purpose → Provide clear measures of success → Strengthen and align purpose	Recognition and motivation → Promote professional development opportunities
TIME	Workload management → Monitor and manage capacity → Minimise workload	Policy and practices → Provide flexible work practices → Expand communication tools → Enable feedback loops
RELATIONSHIPS	Individual support → Enable community opportunities	Workplace support → Provide emotional support and care → Strengthen team culture → Triangulate support
WORKPLACES	Space → Improve working environment	Resources → Improve tools and systems

Household Complexity

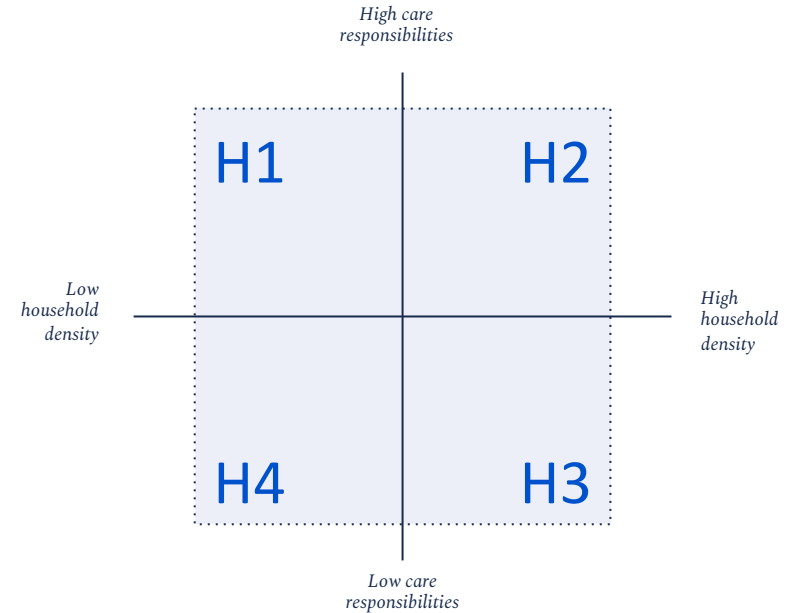
Household Complexity

A person's household complexity will influence their remote working needs, and their associated expectations of their organisation.

As peoples' household dynamics shift, their remote working experiences, and their anticipated needs will also change.

Household density refers to the number of people who occupy the home workspace in relation to the size of the space.

Care responsibilities indicates the level of time and attention people spend on others external to work. This includes caregiver duties; maintaining a functioning space; managing relationships.



Household Complexity

High care, low density
People with significant responsibilities to others outside the home; living alone

Low care, low density
People with low domestic care duties; living alone

Low Household Density

High care, high density
People with significant domestic care duties in the home; living with others

High Household Density

High care Responsibilities

Low Care Responsibilities

H1

"I live away from my family [...] I find myself needing to talk to my family a lot more than before Covid."

- AUS1 🇦🇺

H2

"I want separation - so [my kids] don't have to work it out, that I'm home, but I'm not 'mom'. I'm an employee that has a job that needs to be done."

- USDS 🇺🇸

H4

"It's not a huge apartment, but it's fine. There are always days that are a little more tense than others, but we have not really experienced big arguments as some couples have."

- FR4 🇫🇷

H3

"I haven't made a distinction between work/home - but I'm not fussed - my kids are older, I don't have that responsibility."

- AUS2 🇦🇺

Low care, high density
People with low domestic care duties; living with others

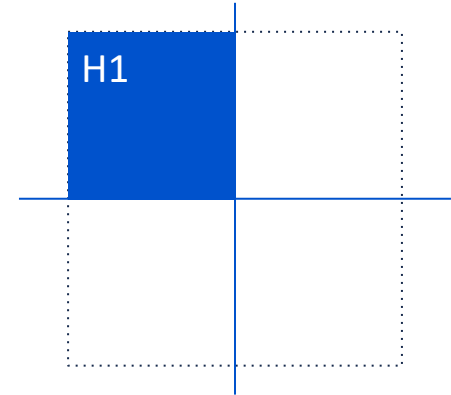
High Care Responsibilities + Low Household Density

People with a low density household live alone or with one other. They have significant care responsibilities to the person they are living with, or if living alone, to others external to their home (e.g. parents). The shift to remote work has increased their care responsibilities in caring and/or providing for others, on top of maintaining their own wellbeing.

Unlike those with high density households, those who identify in H1 have a more even ratio of people-to-physical-space in the home, allowing for more personal space.

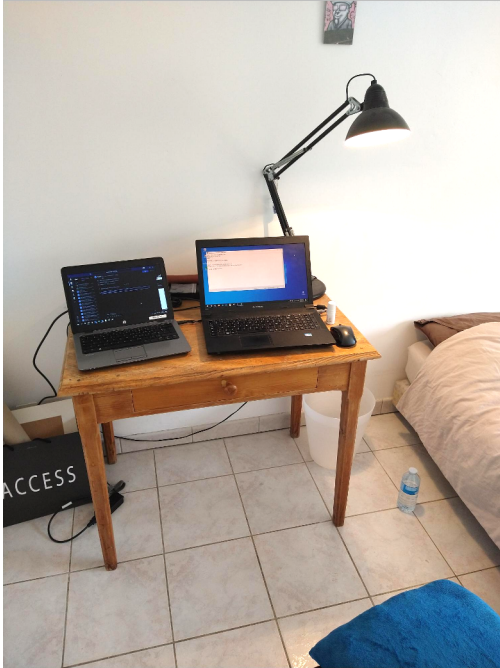
People with high care responsibilities can feel overwhelmed juggling care duties on top of their professional workload and expressed feeling pressure to maintain the same level of effectiveness at work.

Remote working has meant limited opportunities for casual 'check-ins' with colleagues. For people in H1 this can mean their struggle with care responsibilities can go unnoticed or unsupported in the workplace.



This could include:

someone living alone with significant care duties outside the home; living with one other, who has high-needs.



WFH snapshot: France

A low density household can also mean a house with a small footprint, leaving no boundary between a person's workspace and living spaces.

H1

High Care Responsibilities
Low Household Density

H1 Insights

Work responsibilities can feel overwhelming when care duties are high.

People may be distracted from work if other needs are more pressing.

The person to whom they provide care may also require privacy.

There are no 'natural opportunities' for others to pick up on personal challenges.

The responsibility to express needs often falls on the individual.

H1 Opportunities

Workload management

Monitor and manage capacity

- ◆ Regular workload checkpoints
- ◆ Triage work responsibilities

Minimise workload

- ◆ Distribution of non-essential work
- ◆ Reiterate permission to decline
- ◆ Reiterate permission to take leave

Space

Improving working environment

- ◆ Alternative work environment
- ◆ Equipment or budget to improve their WFH setup

Workplace support

Provide emotional support and care

- ◆ Access to professional psychological services
- ◆ Safe ways to express personal challenges

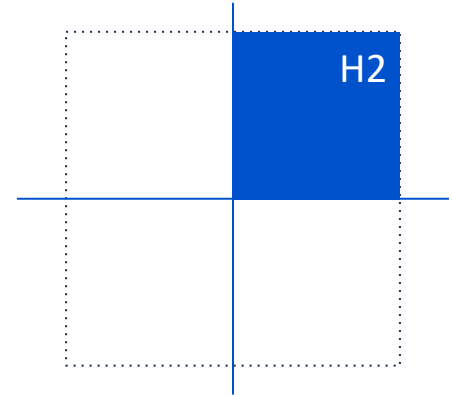
High Care Responsibilities + High Household Density

People with a high density home are sharing a household with two or more people. Their care responsibilities are to those they are living with and are experiencing increased duties as a result of their household working/studying from home.

Those who identify in H2 have a higher intensity within the home due to multiple people needing to share the same physical space, and one or more of the occupants require care.

Living with several others means managing multiple relationships, and/or lack of a physical environment conducive to work or relaxation.

People with high care responsibilities can feel overwhelmed juggling care duties on top of their professional workload and expressed feeling pressure to maintain the same level of effectiveness at work.



This could include:

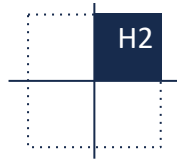
This could include: parent with children; person caring for elderly parents.

“I really want life back to normal so when I’m home with my kids, I’m home with my kids.

I want separation - so they don’t have to work it out, that I’m home, but I’m not ‘mom’. I’m an employee that has a job that needs to be done.

Sorry, I’m getting emotional, but it’s been a stressful couple of months.”

- USDS 



High Care Responsibilities
High Household Density

H2 Insights

Work responsibilities can feel overwhelming when care duties are high

Mounting pressure and responsibilities from household impedes ability to decompress/regulate own wellbeing

People may be distracted from work if other needs are pressing

The person to whom they provide care may also require privacy

H2 Opportunities

Workload management

Monitor and manage capacity

- ◆ Regular workload checkpoints
- ◆ Triage work responsibilities
- ◆ Encouragement to voice workload concerns
- ◆ Reimburse care expenses e.g. childcare

Minimise workload

- ◆ Distribution of non-essential work
- ◆ Reiterate permission to decline
- ◆ Reiterate permission to take leave

Workplace support

Provide emotional support and care

- ◆ Access to professional psychological services

Triangulate support

- ◆ Buddy system connecting colleagues with shared experiences

Space

Improve working environment

- ◆ Alternative work environment
- ◆ Equipment or budget to improve their WFH setup

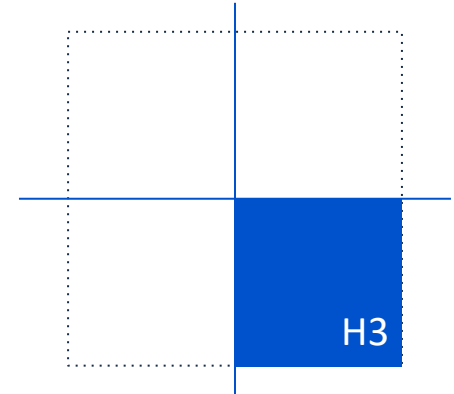
Low Care Responsibilities + High Household Density

People with a high density household are living with two or more people who do not require a significant level of care responsibilities.

Those who identify in H3 have a higher intensity within the home due to multiple people needing to share the same physical space. This can mean a lack of a physical environment conducive to work or relaxation. Living with several others also means managing multiple relationships, requiring constant negotiation and accommodation of other people's needs.

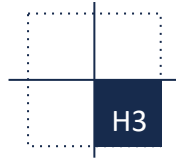
Unlike those with high care responsibilities, people identified in H3 do not have significant care duties and are more able to use their free time for personal needs.

People with a high density household and low care responsibilities are more likely to be enjoying the company of their household throughout this shared experience. For example, parents enjoying more opportunities to spend time with their children.



This could include:

person in a multi-person share house;
parents living with adolescent or adult children.



Low Care Responsibilities
High Household Density

WFH snapshot: Australia

More people needing dedicated real estate for work or study can make it difficult to find an ergonomic working space in a high density household .

H3 Insights

A crowded household can curb an effective workspace that is ergonomic and free of disruptions

Ability to enjoy the benefits of working from home is not overshadowed by significant care duties

H3 Opportunities

Space

Improve working environment

- ◆ Alternative work environment
- ◆ Equipment or budget to improve their WFH setup

Policy and practices

Provide flexible work practices

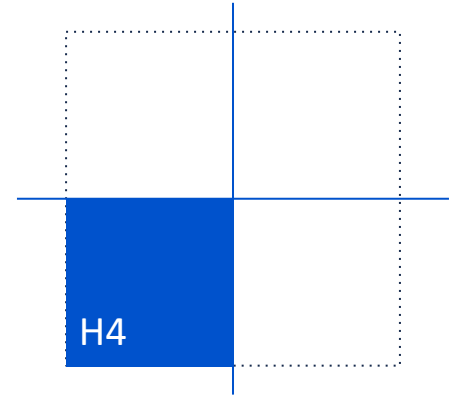
- ◆ Employee autonomy over when hours are worked outside of compulsory attendance

Low Care Responsibilities + Low Household Density

People with a low density household are living alone or with one other who does not require a significant level of care. Those who identify in H4 have more autonomy in how they manage their routine and physical environment.

Though they may be in a position to work effectively, a lack personal support within the home or, if living alone, deprivation of daily cues and company from others can lead to overworking and feelings of isolation.

Those in H4 may have the least insight to the struggles their colleagues with high care responsibilities and high density households are currently facing.



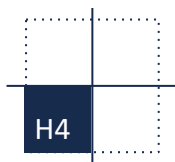
This could include:

single person living alone; sharing a household with another adult.

“I haven't made a distinction between work/home - but I'm not fussed - my kids are older, I don't have that responsibility.”

I enjoy taking on more responsibility - I can give my time and have the headspace to do it. When my kids were little it was more important to have a clear divide - I'm now a boring person.”

- AUS2 



Low Care Responsibilities
Low Household Density

H4 Insights

Work responsibilities can dominate when there are limited other duties in the household

Low density household can intensify feelings of isolation, decrease motivation and wellbeing

H4 Opportunities

Space

Improve working environment

- ◆ Improve environmental cues
- ◆ Alternative work environment
- ◆ Tools to promote boundaries between work and home

Workload management

Monitor and manage capacity

- ◆ Regular workload checkpoints
- ◆ Triage work responsibilities
- ◆ Processes to support balanced work hours

Workplace support

Provide emotional support and care

- ◆ Access to professional psychological services

Triangulate support

- ◆ Buddy system to support regular connection

Role Complexity

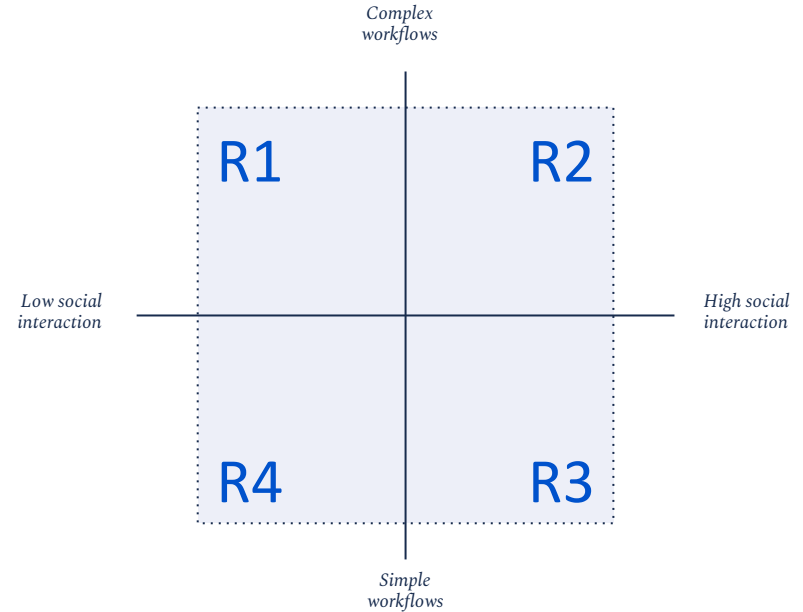
Role Complexity

A workers' role complexity will influence their ability to complete tasks remotely, as well as the level of confidence they have during this time.

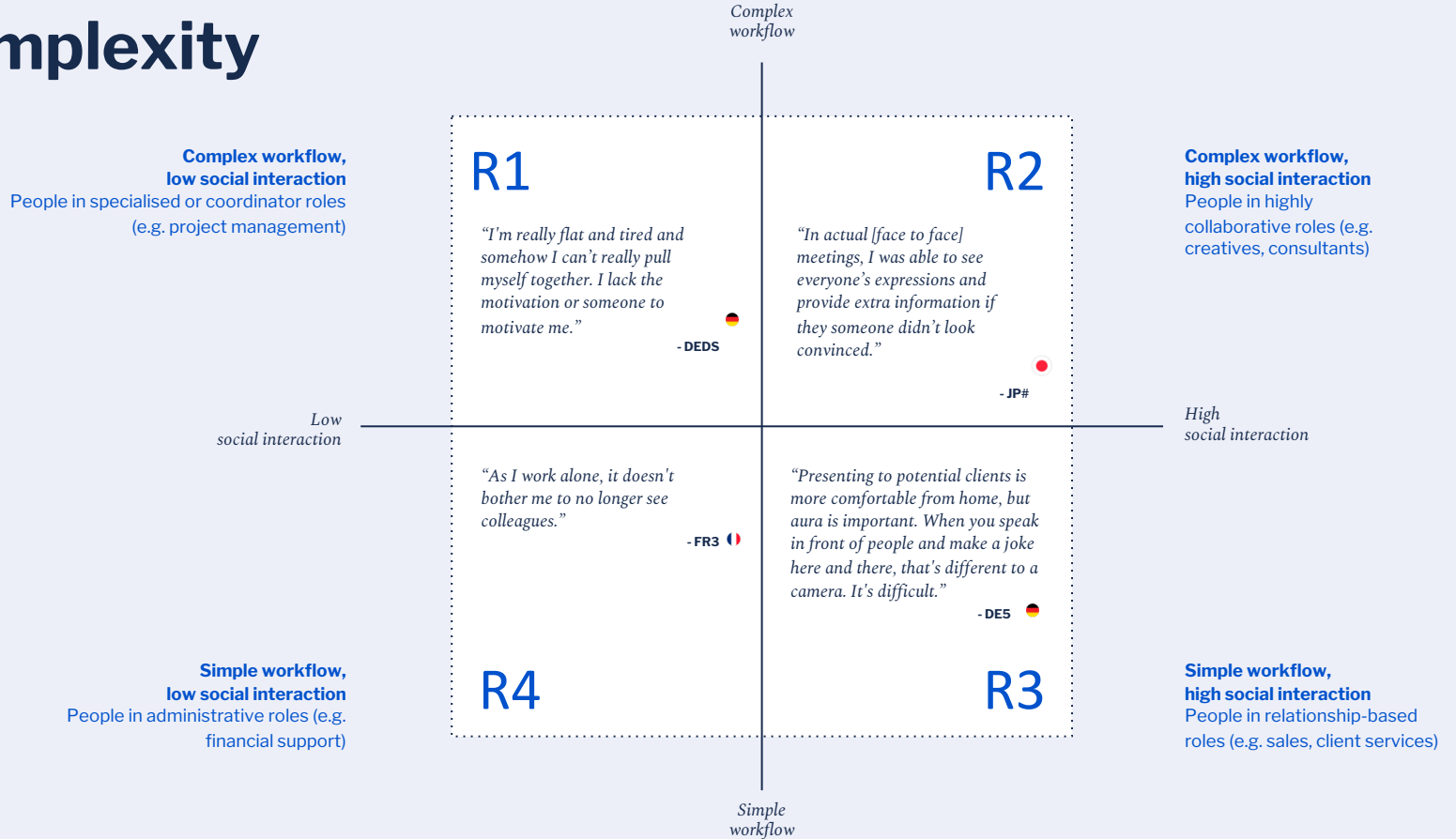
We explored how the profile of different roles may influence people's ability to feel confident in their roles during this time. Over time, people may change roles, or have their roles innovated. This will influence what level of confidence they experience.

Workflow complexity refers to the role's level of dependency on other people or processes to complete a work task.

Social interaction describes the degree to which individuals' roles rely on building and maintaining working relationships.



Role Complexity

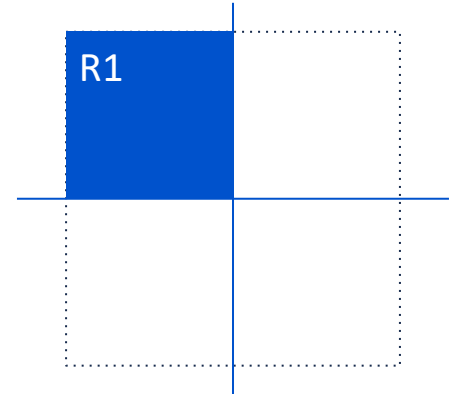


Complex Workflow + Low Social Interaction

People in these roles depend on others to complete work tasks but are able to complete tasks independently and asynchronously. Those identified in R1 are likely to be delegators or project based. They possess an overview of milestones and division of tasks, as well as their team's fluctuating workloads.

The shift to remote working has increased the coordination cost of communicating with and delegating work to their team, increasing their workload substantially.

Unlike those whose roles require high social interaction, those identified in R1 do not require collaboration in real time. This can lead to feeling siloed and isolated over time.



Team-based work, task coordination

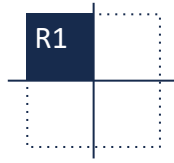
People in specialised or coordinator roles (e.g. project management)

“I have to get over myself a little bit today because I’m really flat and tired and somehow I can’t really pull myself together. I lack the motivation or someone to motivate me.

In my [physical] office I would have personal contact with my team. You would be able to see someone, what they look like (face, clothes, gait, etc.) and be able to tell how they feel. All this is lost in (remote).

I really enjoy my work. I have some people under me to whom I can give instructions. But for me participation is very important and I like to work in a team.”

- DEDS 



Complex Workflow
Low Social Interaction

R1 Insights

Working asynchronously can lead to feeling disconnected and siloed from colleagues and/or the organisation

Tools or systems that inhibit the needs of the project or team increase coordination cost, adding to workload

R1 Opportunities

Workplace support

Strengthen team culture

- ◆ Enable dedicated work hours to strengthen team culture
- ◆ Increase opportunities to connect socially
- ◆ Provide opportunity to co-locate with colleagues

Resources

Improve tools and systems

- ◆ Invest in bespoke or custom tools and systems
- ◆ Provide flexibility to use tools or systems that meet team/project needs

Clarity and purpose

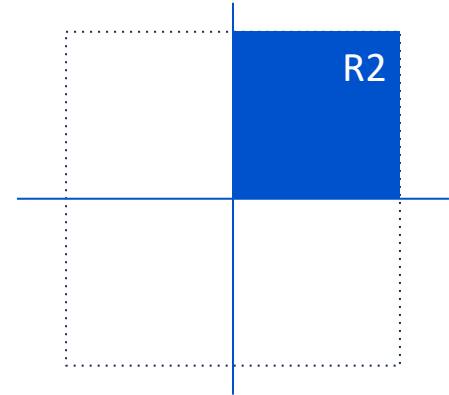
Provide clear measures of success

- ◆ Implement work practices that are outcome, not output, focused

Complex Workflow + High Social Interaction

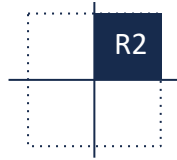
People identified in R2 require synchronous collaboration in real time to gain consensus and make decisions. Because their role depends more highly on the input of others, they are less able to be autonomous with their schedule and the schedule of their teams.

High touch social interactions come with an additional coordination cost as well as 'facilitation fatigue' from the additional effort required to communicate virtually. This same high touch with colleagues has likely helped them maintain purpose and adapt to remote working through shared experiences.



Team-based work, task coordination

People in highly collaborative roles (e.g. creatives, consultants)



Complex Workflow
High Social Interaction

R2 Insights

Maintaining workflow while balancing the availability of multiple schedules

Reliable access to essential hardware and software, for multiple synchronous users

R2 Opportunities

Policy and practices

Expand communication tools

- ◆ Invest in tools that give visibility to preferred working times and availability

Resources

Improve tools and systems

- ◆ Invest in bespoke or custom tools and systems

Policy and practices

Provide flexible work practices

- ◆ Allow use of tools or systems that meet team/project needs

Space

Improve working environment

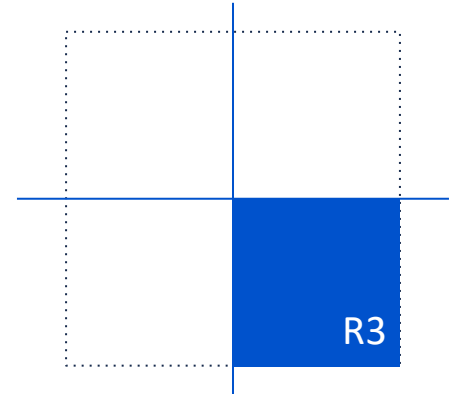
- ◆ Access to physical working environment
- ◆ Provide opportunity to co-locate with colleagues

Simple Workflow + High Social Interaction

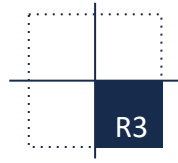
People who identify in R3 typically hold relationship-based roles and rely more heavily on 'soft cues' to form meaningful bonds than other roles do.

The shift to online has brought an awareness of the limitations of tools, adding an additional level of difficulty to coordinate their team and tasks. The shift to virtual communication methods has formalised many parts of their role that previously relied on organic conversation.

Given that much of their role is hard to quantify in 'hard data', people in R3 are feeling pressure to show evidence of their work efforts. This is causing some to feel self conscious about the value of their role being overlooked in a remote environment.



Independent work, task negotiation
People in relationship-based roles
(e.g. sales, client services)



Simple Workflow
High Social Interaction

R3 Insights

Loss of 'soft cues' that help to develop and maintain relationships crucial to their role

Feeling pressure to show 'hard' evidence of work output

R3 Opportunities

Policy and practices

Expand communication tools

- ◆ Develop or invest in tools that prioritise human connection

Space

Improve working environment

- ◆ Access to physical working environment
- ◆ Provide opportunity to co-locate with colleagues

Clarity and purpose

Clear measures of success

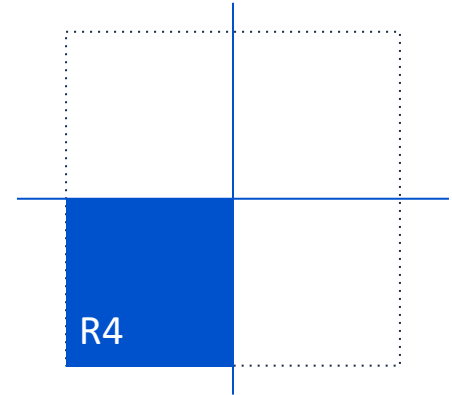
- ◆ Promote work practices that are outcome, not output, focused
- ◆ Develop new measures of success that reflect new ways of working

Simple Workflow + Low Social Interaction

People with a simple workflow and low social interaction require little collaboration and are able to work independently to perform their role. People in R4 roles rely heavily on accurate systems and tools. They are delegated their work or have a firm understanding of their responsibilities within a workflow, making them process driven and able to report on hard measures of their workload.

The shift to remote work has removed any incidental interactions they may have had in the physical work environment. Without the need to interact with others to perform their role, people in R4 feel their workload is only visible via their quantified output. This is contributing to feelings of being replaceable and undervalued in the organisation.

Having independent workflows can lead to feeling siloed and isolated over time and require proactively implementing their own work boundaries.



Independent work, task execution
People in administrative roles
(e.g. financial support)

“As I work alone, it doesn't bother me to no longer see colleagues. I'll be honest, I find it difficult to name any difficult aspects with adapting to work [from home].

On the work front, there were no difficulties, but making the link between work and home was the most difficult.

Before I was 400% available for my children, it was an absolute priority and now the fact I am working at home and not being able to answer them was difficult.”

-FR3 



R4 Challenges

Prone to feeling undervalued or replaceable in a remote working environment

Reliable access to essential hardware and software is critical to perform role effectively

Without the need to interact with others, vulnerable to feelings of isolation

R4 Opportunities

Recognition and rewards

Promote professional development opportunities

- ◆ Opportunities to upskill
- ◆ Diversify role responsibilities

Space

Improve working environment

- ◆ Access to physical working environment
- ◆ Supply equipment or allowance to improve home working space

Workplace support

Strengthen team culture

- ◆ Increase opportunities to connect socially
- ◆ Provide opportunity to co-locate with colleagues

Provide emotional support and care

- ◆ Access to professional psychological services

Triangulate support

- ◆ Buddy system to support regular connection

Network Quality

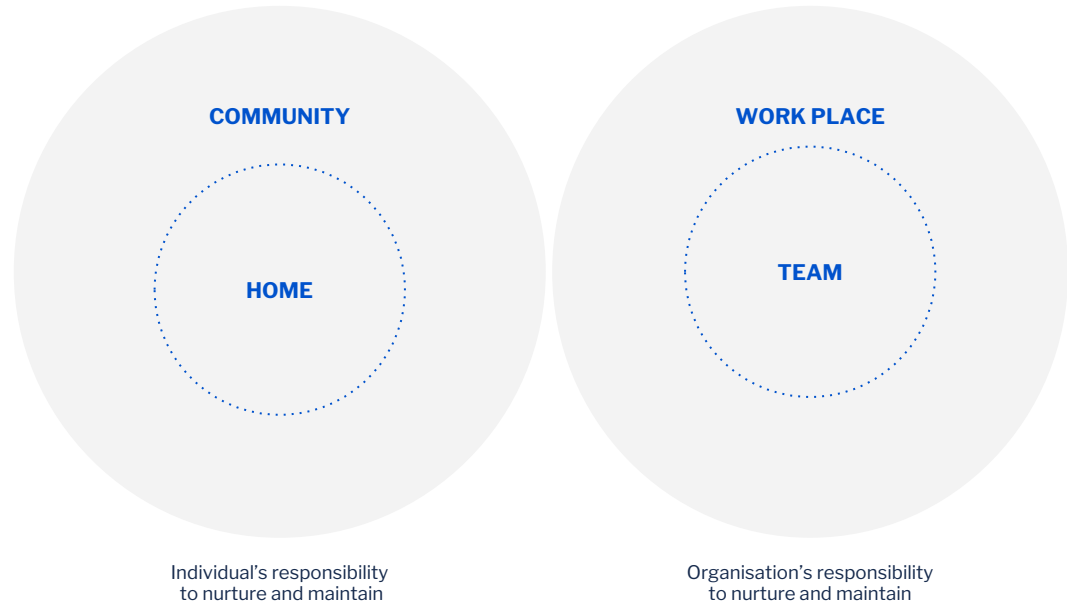
Defining 'network'

We have explored networks by the origin of their development; either by the individual personally, or by the organisation professionally.

This diagram does not attempt to place value on the different types of connections people have.

Instead, by viewing networks by origin, we can distinguish which networks an organisation has influence over, and those they don't.

An individual's networks



Network Quality

The quality of networks people have access to and the support they receive influences their ability to cope with the many adjustments of remote working.

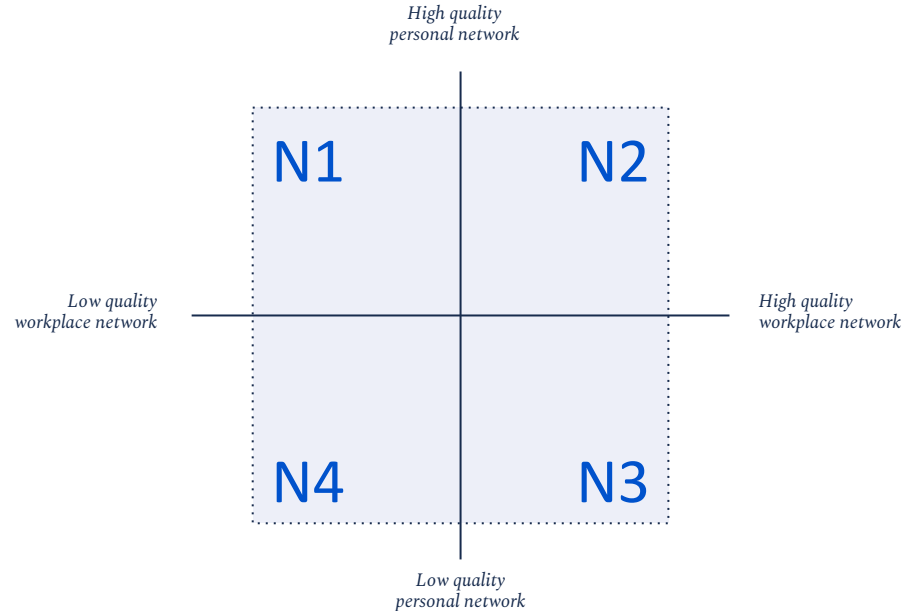
As people become more or less connected, either to their work or their community, their ability to cope may shift in response.

Personal network refers to the connections that individuals create and facilitate themselves.

Personal network quality refers to the strength of support and sense of belonging an individual derives from these relationships.

Workplace network refers to the connections created through and facilitated by (organisations).

Workplace network quality indicates the strength of support and sense of fulfillment/belonging individuals derive from those connections.



Network Quality

**High personal network,
Low workplace network**

Reliable community connections; limited ties to workplace beyond immediate team

Low quality workplace network

**Low personal network,
Low workplace network**

Distanced from external communities; limited ties to workplace beyond team

High quality personal network

N1

“Not knowing anyone [in the workplace] and being in lock down has made it hard... it happened right as I moved here. I’m not in a direct team so [there is] no reason to interact.”

- USA2 

N2

“Because I live alone, I have been getting a lot of contact from my good friends checking on me.”

- AUS1 

**High personal network,
High workplace network**

Reliable community connections; established ties to colleagues and organisation

High quality workplace network

N4

“Quite frankly, I’ve gotten very disappointed because none of the people that I thought were my friends are even caring or reaching out.”

- USA1 

N3

“The (group chat) for my own team is very active, and we communicate about everything. We check on our wellbeing, and organize our workloads.”

- JP5 

**Low personal network,
High workplace network**

Distanced from external communities; established ties to workplace and organisation

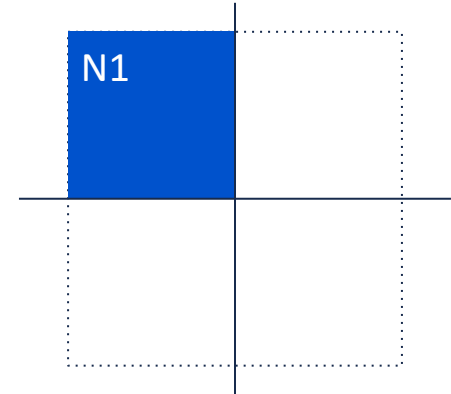
Low quality personal network

High Quality Personal Network + Low Quality Workplace Network

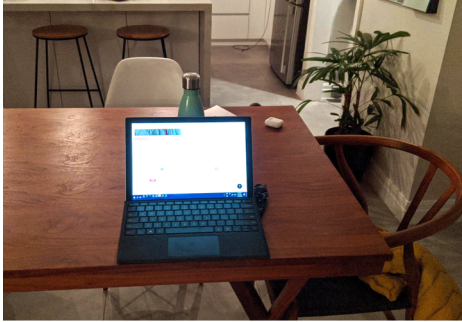
People that have a high quality personal network are personally fulfilled by their ties outside of the workplace and draw upon these for personal support and sense of belonging. They are motivated by a strong sense of purpose that is rooted in values external to their work.

Within the workplace, they have weaker workplace networks than they would prefer. In the shift to remote working, they are concerned about limited engagement with leadership or others that could impede career prospect opportunities.

For people in N1, organisational purpose matters more to them than workplace social culture. They appreciate being supported to contribute to their values through their work and workplace.



This could include:
a new transfer with strong ties to friends back home



“Not knowing anyone and being on lock down has made it hard... it happened right as I moved here

I didn't manage to interact online - I'm not in a direct team so [there was] no reason to interact.

We do a family game night once a week... make recipes [...] or play mario kart.”

- USA2 

N1 Challenges

Prioritises community network over work social network

Sense of loyalty is purpose-driven, not relationship driven.

Concerned about career prospects with limited engagement opportunities in remote work

N1 Opportunities

Policy and practices

Provide flexible work practices

- ◆ Enable individual the opportunity to nurture personal networks that support them

Workplace support

Strengthen team culture

- ◆ Provide various ways for people to engage with organisational culture
- ◆ Allow for an opt in culture

Clarity and purpose

Strengthen and align purpose

- ◆ Leverage people's purpose-driven motivation via internal projects or responsibilities

Recognition and rewards

Promote professional development opportunities

- ◆ Develop opportunities to increase visibility in remote environment
- ◆ Connect with influential leaders or mentors within the organisation

High Quality Personal Network + High Quality Workplace Network

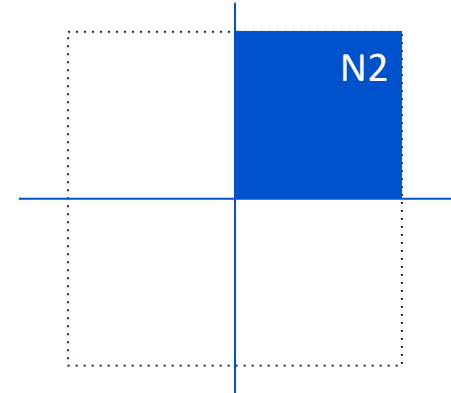
People who are recognised to have a high quality personal network are personally fulfilled by their ties outside of the workplace and draw upon these for personal support and sense of belonging.

Within the workplace, they have established connections with immediate colleagues and more broadly within the organisation, perhaps due to tenure or seniority of role.

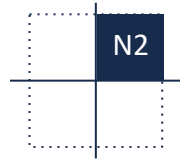
Having robust networks both personally and in the workplace provides a greater pool of support to draw upon, especially during times of disruption and change.

For people in N2, their networks inside and outside of the workplace are just as important as the other. However, when both demand a lot, people in N2 are more prone to exhaustion or risk of burnout.

People in N2 are good candidates to champion organisational social culture in the workplace.



This could include:
an established employee with school-aged children



High Quality Personal Network
High Quality Workplace Network

N2 Insights

Resilient to disruptions in either sphere (because they have the other one to lean on)

Networks outside of work are valued as much as their workplace networks, require opportunity to nurture both

May be prone to burn out or at risk of exhaustion when trying to maintain high needs of personal and workplace networks

N2 Opportunities

Workplace support

Strengthen team culture

- ◆ Empower these workers to leverage their strong connections to motivate and connect others in the workplace

Workplace support

Strengthen team culture

- ◆ Enable dedicated work hours to strengthen team culture
- ◆ Increase opportunities to connect socially
- ◆ Provide opportunity to co-locate with colleague

Policy and practices

Provide flexible work practices

- ◆ Enable work practices to nurture personal networks

Workload management

Monitor and manage capacity

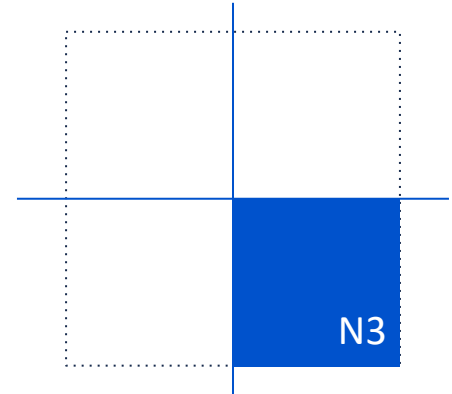
- ◆ Triage work responsibilities
- ◆ Reiterate permission to decline
- ◆ Reiterate permission to take leave

Low Quality Personal Network + High Quality Workplace Network

People who are recognised to have low quality personal networks are distanced from communities outside of the workplace either due to circumstance (i.e.. transferring to a new office location; regularly working overtime) or preference (i.e.. not seeking external networks beyond their workplace or home), and have fewer support networks to draw upon.

Within the workplace, people in N3 have strong connections to their team and/or organisation and derive their sense of 'belonging' from their workplace. In the shift to remote working, people in N3 are conscious of maintaining team connection and are often instrumental in instigating activity.

For people in N3, the move to remote work has highlighted their reliance on workplace connections for support and they are therefore more sensitive to changes that affect their workplace networks.



This could include:
career-driven person who has sacrificed personal opportunities.

“The [group chat] for my own team is very active, and we communicate about everything. We check on our wellbeing, and organise our workloads.

When we go back to the office, it’ll probably feel like going back to school after summer holiday.

[...] since I live alone, I haven’t touched anyone for about 4 months. Isn’t it crazy to think that I haven’t touched anyone for one-third of the year?”

- JP5 ●



N3 Challenges

Reliance on others to foster team connection

Remote work highlighting sole dependence on work; feeling 'gaps' in or weakness of personal network

Prone to overworking/throwing themselves into work

Sensitive to changes in their workplace that disrupt their workplace dynamic

N3 Opportunities

Workplace support

Strengthen team culture

- ◆ Enable dedicated work hours to strengthen team culture
- ◆ Support team relationships

Clarity and purpose

Strengthen and align purpose

- ◆ Tie to organisational purpose, not solely people based

Individual support

Enable community opportunities

- ◆ Engage with corporate social responsibility activity
- ◆ Internal projects that connect to wider community

Workload management

Monitor and manager capacity

- ◆ Regular workload checkpoints

Policy and practices

Enable feedback loops

- ◆ Enable input to workplace changes

Workplace support

Triangulate support

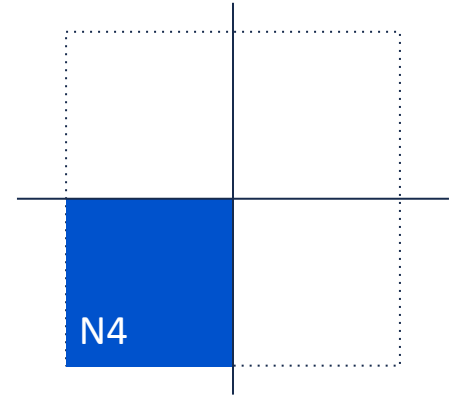
- ◆ Decrease reliance on single person/persons

Low Quality Personal Network

Low Quality Workplace Network

People who have low quality networks are distanced from communities outside of the workplace either due to circumstance (i.e.. transferring to a new office location; regularly working overtime) or preference (i.e.. not seeking external networks beyond their workplace or home), and have fewer support networks to draw upon.

Within the workplace, they are more distanced from their teammates and organisation than they would prefer. In the shift to remote working, they are concerned about limited engagement with leadership or others that could impede career prospect opportunities. Having limited personal networks, they are feeling the loss of workplace interactions and are likely to feel isolated from their organisation.



This could include:

Someone in a siloed role
(e.g. specialist, contractor) who
has few personal connections.



N4 Insights

Desire for greater connection to colleagues and organisation more broadly

Desire for greater opportunity to connect with broader community

N4 Opportunities

Workplace support

Strengthen team culture

- ◆ Enable dedicated work hours to strengthen team culture
- ◆ Increase opportunities to connect socially
- ◆ Provide opportunity to co-locate with colleagues

Individual support

Enable community opportunities

- ◆ Engage with corporate social responsibility activity
- ◆ Internal projects that connect to wider community

Using the Experience Factors

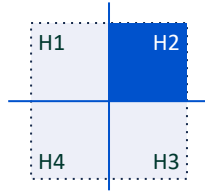
Understanding the relationship between factors

Developing a holistic insight into a person's current experience helps to determine what their anticipated needs may be from their organisation and how organisations need to adapt to support the changing needs of their workforce.

Understanding the benefits and challenges people are facing helps organisations determine where opportunities lie.



Elijah's story



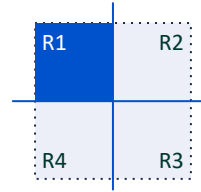
Household Complexity

Elijah lives in a high density household with his young children.

He shares his care responsibilities with his wife, who is also working full time.

Elijah's high care responsibilities require him to balance homelife with his work responsibilities. Having young children means his care responsibilities will take precedence over work at times.

Lockdown restrictions that impact support mechanisms such as childcare directly affect Elijah's ability to perform his role and cope with the adjustments to working remotely.

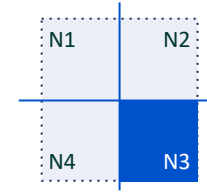


Role Complexity

He is a project manager and able to work asynchronously with his team.

For some, working asynchronously can lead to feelings of isolation, however, viewing this factor alongside his network quality will provide greater insight if this is the case for Elijah personally.

Being a project manager means Elijah has a significant coordination cost in communicating and updating his team continuously. Without adjustments to his work capacity, Elijah will need to work additional hours to accommodate for these extra coordination hours.



Network Quality

Elijah has worked at his company for a long time and has strong workplace connections.

Elijah's strong workplace network connection enables him to maintain a sense of connection to his colleagues, despite rarely being online at the same time.

Between work and his young children, Elijah is kept busy and doesn't commit a lot of time to other community ties. For this reason, he values the social bond he has with his work colleagues even more.

Since the shift to remote work, Elijah and his team have tightened their bond and Elijah imagines it will be difficult to onboard someone new in a remote setting, without ever meeting face to face.

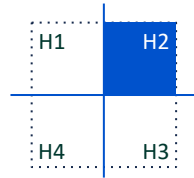
Understanding Experience Factors over time

Over Time

Household Complexity

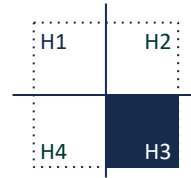
As work practices continue to evolve, it's important to understand individuals' experiences over time. These experience factors help track those changes over time and the anticipated challenges and benefits.

NOW



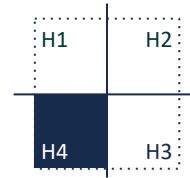
Living in a small apartment with his young family

NEXT



As his children become more independent, Elijah's care responsibilities shift

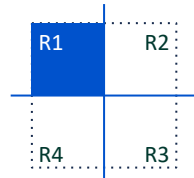
FUTURE



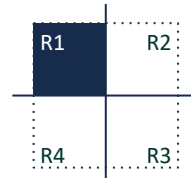
Elijah is dreaming of buying a large block of land where he and his family have more space

Role Complexity Over Time

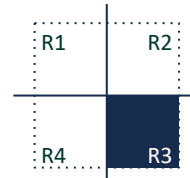
Though a person may remain in the same quadrant over time, their needs and challenges will continue to evolve. For example, though Elijah remains in the same role type for a period, he continues to be faced with new challenges of managing a team remotely.



Elijah is a project manager and is responsible for his team's progress.



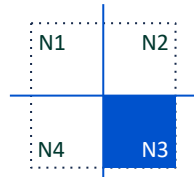
Elijah's team has restructured and he is faced with the challenge of onboarding new team members and building team cohesion remotely.



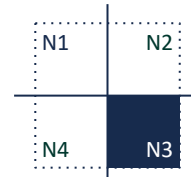
Elijah receives a promotion and moves into a client facing role.

Network Quality Over Time

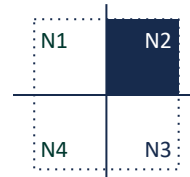
Understanding how other experience factors relate to another helps anticipate where a person's needs, challenges and focus may lie at a point in time. For example, shifts in Household complexity - such as moving to a bigger block, are likely to affect Elijah's personal network quality.



Has established workplace relationships with this team, and is focused on caring for his young children.



Continues to expand his workplace networks to increase chances for a promotion.



His children are older and they have moved to a bigger block. Elijah is eager to expand his personal network in his new neighbourhood.

Country Level Insights



Australia
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USA
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Japan
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Germany
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France
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Who we spoke to

We conducted research with knowledge workers who experienced some form of forced or elective remote work during our research period of April - June 2020.

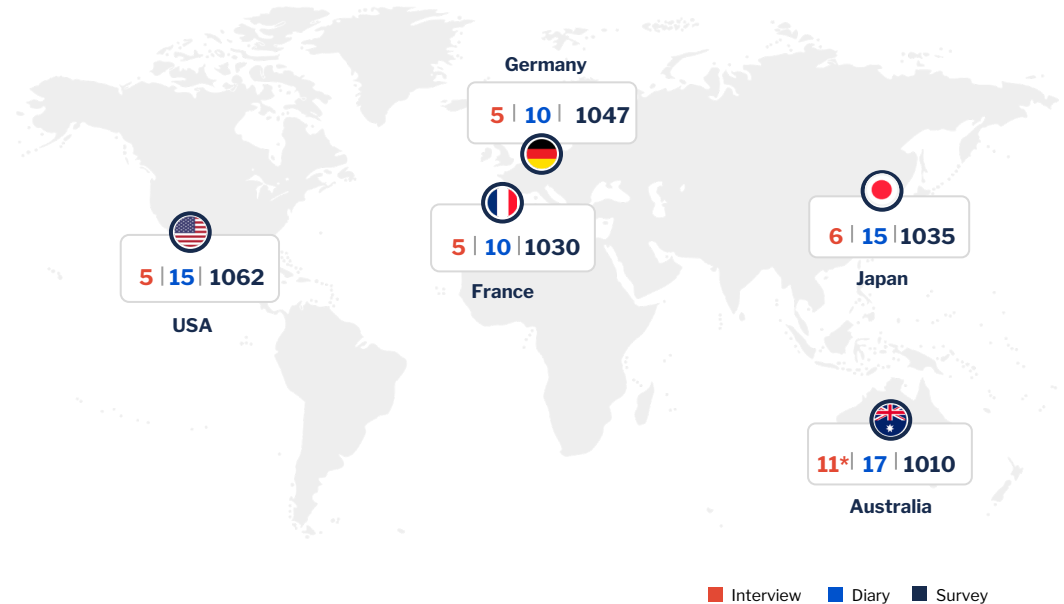
The countries were selected both for their strategic growth potential for Atlassian, and to provide a diverse representation of work and home lives, living conditions and cultures.

Each study included the following research activities:

Interviews were held over the course of an hour, exploring workers' prior contexts, their remote experience, and their expectations for the future.

Diary studies conducted over two weeks provided rich examples of work frustrations and successes as they happened, and all while participants managed the needs of the home.

Quantitative surveying of over 5,000 workers helped to contextualise and challenge the qualitative findings, while providing providing baseline measures for future research.



*Including 5 staff from participating partner ANZ

Shared experiences, but different contexts

One key finding helps to describe the widely felt impacts of remote work. All employees described the physical, emotional and professional shifts they were needing to manage in order to remain successful in their capacity as 'employees'. We have summarised the cumulative effects of these shifts as 'Managing More'.

Managing identity

The line between private and professional selves has blurred, and the ways in which we manage these separate identities has shifted.

Managing relationships

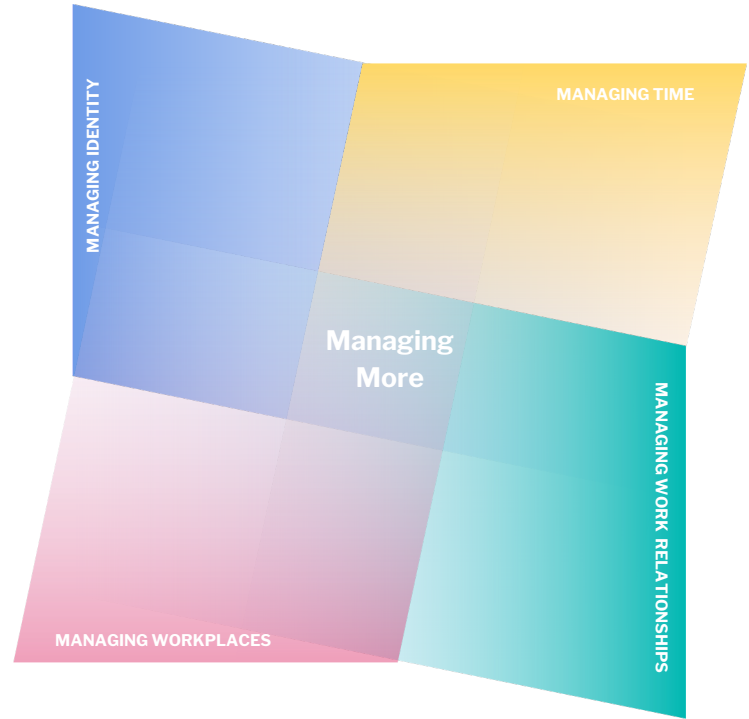
The ways in which interact and form connections with our colleagues has changed.

Managing time

The ways in which we balance home and work demands are changing. Coordinating and aligning is more time consuming. There's a new autonomy at work, but it's harder to protect boundaries.

Managing workplaces

Organisations have as many workplaces as they do employees, and support needs and expectations have changed.



Australia



Australia

Australians have had a positive remote working experience. Most (68%) had experienced improved job satisfaction, and more (70%) believe their work-life balance has improved since the transition.

Most (73%) had also found reason to increase their satisfaction with company leadership, suggesting Australian leaders were doing right by their employees during this time.

Only 10% of Australians believed their job security was more threatened since the move to remote, compared to 16% of the total sample.

This comparative optimism may be better understood when we consider that Australia was left relatively unscathed by the Global Financial Crisis of 2009.

Australia's remote work experience by the numbers:

>10% above the global average
About the same as the global average
>10% below the global average

Individuals

39%

of people used to **commute more than an hour a day**, compared to 30% of the total sample

33%

of people **have a choice about where they work** from, compared to 47% of the total sample

70%

of people had improved **satisfaction with their work-life balance**, compared to 44% of the total sample

Teams

46%

of people **previously worked with a co-located team**, compared to 54% of the total sample

5%

of people **thought their team worked worse together**, compared to 13% of the total sample

68%

of people **thought their team worked better together**, compared to 40% of the total sample

Organisations

73%

of people **were more satisfied with their company leadership**, compared to just 41% of the total sample

63%

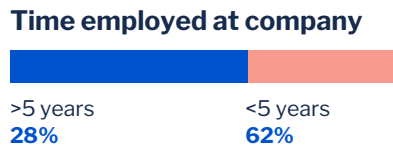
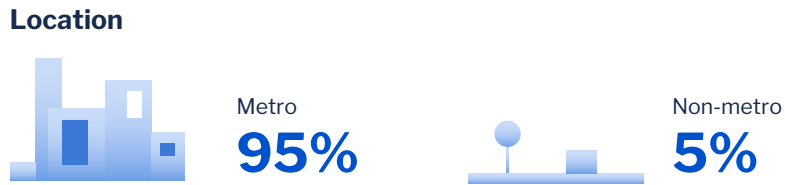
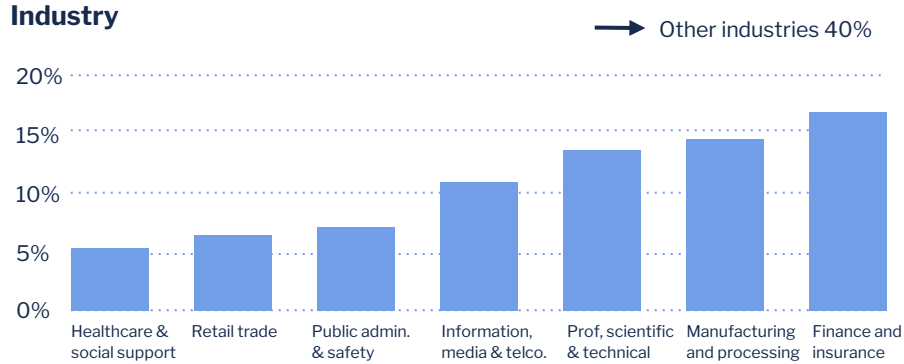
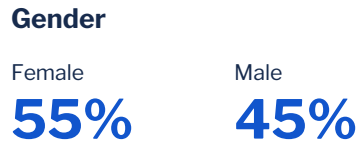
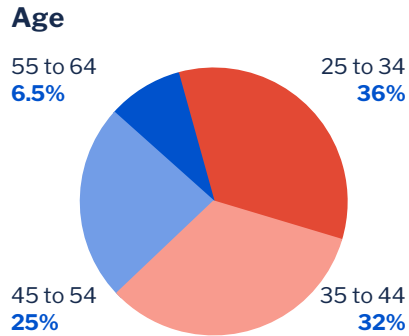
of people had **better trust in their company to do the right thing by employees**, compared to 43% of the total sample

68%

of people **believed the 'new normal' will only benefit businesses, not employees like me**, compared to 34% of the total sample

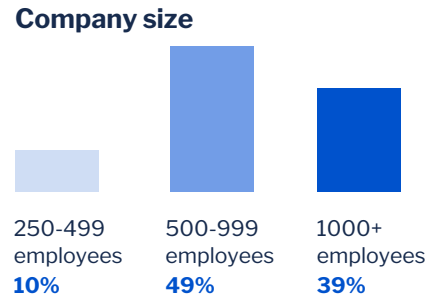
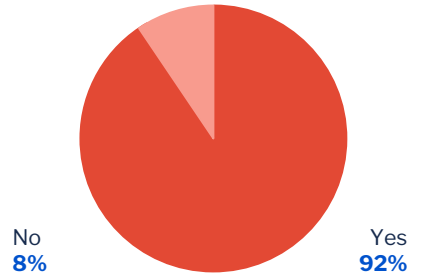
Who we spoke to in Australia

Working arrangements Full-time (30+ hours per week)



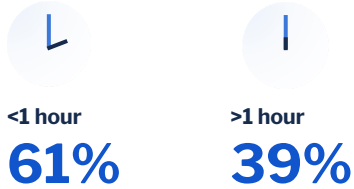
Homeschooling or caring for children during work day due to COVID-19 restrictions

Note: of people with children living at home (62% of total)

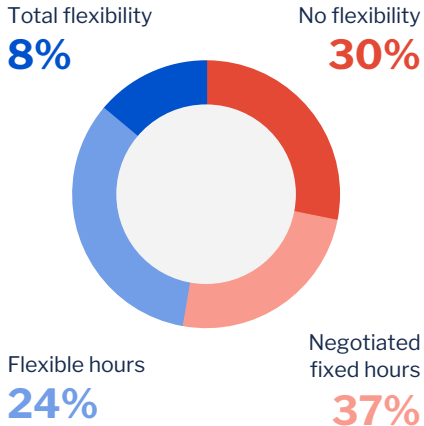


Australia's home and work context

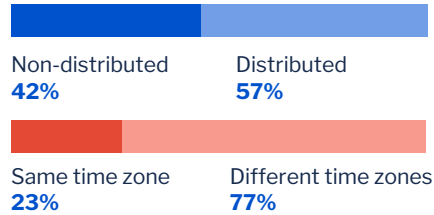
Commute time



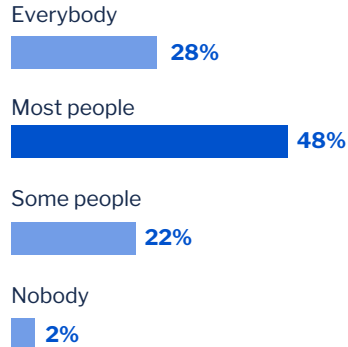
Flexibility



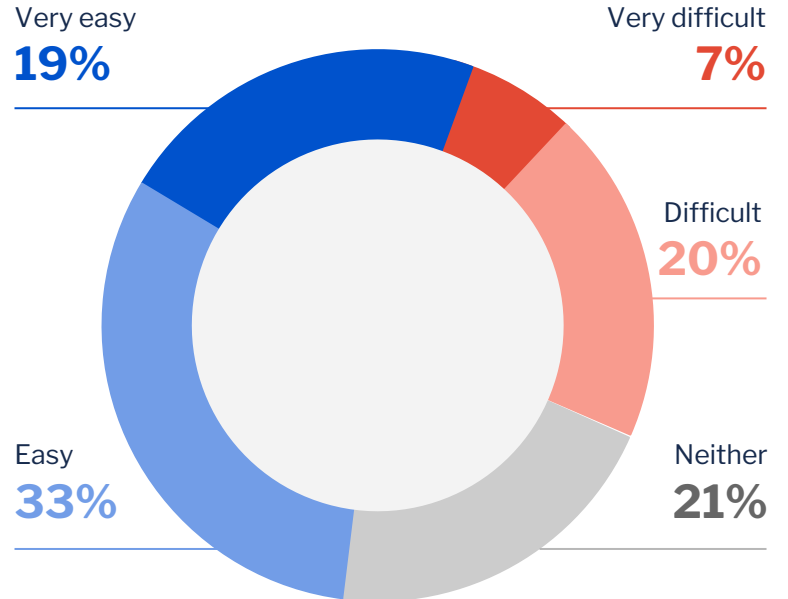
Team location



Number of people in the company working from home during COVID-19 restrictions



How easy or difficult has it been to effectively work at home during the COVID-19 restrictions?



Australia

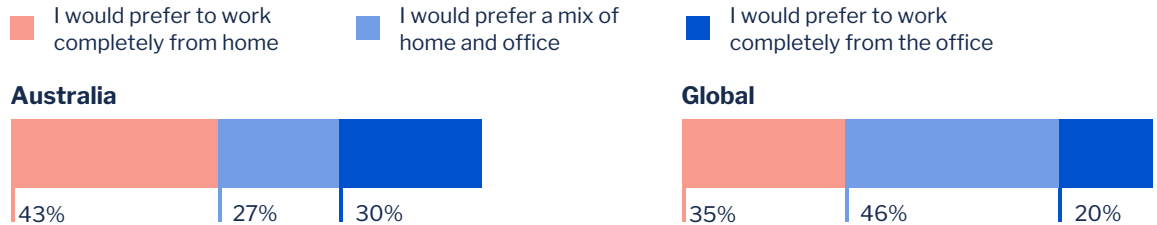
Australians are more likely to want to work completely from home than the total sample.

This may be influenced by the fact that 70% have noticed improvement to their work-life balance since the move to remote. Australians were also more likely (70%) to have a dedicated working space compared to the total sample (63%) which may contribute to the preference.

Interestingly, Australians were quite divided in their preferences. Fewer people (27%) wanted a mix of home and office work, compared to 46% of the total sample. Almost as many (30%) wanted to work from office only.

Note Australians showed greater confidence in their organisations' ability to support a distributed workforce.

If you had a choice, where would you prefer to work at this current time?



27%

of people **found working from home difficult or very difficult**, equal to 27% of the total sample

75%

of people **were annoyed that it took a pandemic to allow them to work from home**, compared with only 47% of the total sample

9%

of people **believed their organisations were not prepared for remote working**, compared to 32% of the total sample

Australia: Identity

Australians were comparatively optimistic about their working futures.

They were less concerned about job insecurity, sharing that fluctuations in the job market were 'natural'.

Even those in industries strongly impacted by recent events believed losing their jobs would lead to new, exciting opportunities.

This attitude has likely been fostered in part by Australia's flexible labour market that has seen corporate downsizing and redundancies become more familiar over the past decade. Australia has also been 'recession free' for close to 30 years, and many workers don't have lived experience of prolonged unemployment.

"(My) industry will hit a major downturn - unemployment is definitely possible. But if I was made redundant, I would just change careers."

- AUS4

64%

believed their job security had improved over this period, compared to just 35% of the total sample



WFH snapshot: Many people are needing to 'make do' to with small spaces.

Australia: Time

Australians found unexpected joys in the simpler lives they were leading under restrictions.

The adjustment to remote work has been eased for many by 'gaining back time' that was previously lost to long commutes. Some have committed this time to hobbies or simply more time with family.

After restrictions, many of our Australian participants intended to maintain a simpler lifestyle, in which they'd dedicate more quality time to their relationships with fewer, more important people.

"Nowadays we don't have the morning rush to wake up at 6:30am to get us ready for work and getting our children ready for school [...] we take it a lot easier in the morning as we don't have to travel to work." - AUS2

39% previously commuted more than one hour a day to work, compared with 30% of total sample

Australians feel their ability to perform their roles are limited by their tools and systems.

Australian participants reported disappointment with the limitations of the technology and tools they have had to embrace with the move to remote work. Many of the tools were not suitable to effectively do their tasks, creating additional time and effort on their behalf.

Some viewed the ill-suited tools as a limitation to the value they were providing to their organisation, while others echoed concerns about the potential of their team and selves being limited as a result.

"We'd be more effective if we had more tools - and people would spend their time analysing the data, rather than getting it out. If we had different tools we'd be doing (more valuable) things." - AUS1

64% said their company would need to provide better systems and tools, of people who reported their company was not ready to go permanently remote

Australia: Relationships

Australians feel the erosion of company culture more acutely than other countries.

Australians referenced the multitude of ways their teams used to 'wind down' or 'switch off' together.

Teams had made significant efforts to organise novelty time together, like trivia and virtual drinks, but felt these only 'scraped the surface'.

The desperation to reignite old rituals (namely, pub lunches) was unanimous.

Australian culture relies heavily on established social engagements, in both a professional and personal context.

"Those (team members) who live locally catch up for a walk together. But we're busting for a get together - especially because we were a newly formed team." - ANZ5

76%

reported their most or all of their company was working from home, compared with 57% of total sample



WFH snapshot: Workplace socialising has been replaced with online engagements. Some people are concerned about letting people see into their personal spaces for fear of what it will reveal about them.

Australia: Workplace

Australians were eager to have a mixed model of work, split between office and home.

They were more likely to miss the energy of their office (77%) than the total sample (49%). This reflects Australians' social culture, where work is more frequently peppered with moments of reprieve, and bonding.

People imagined their future office as a place for nurturing social relationships, evidenced in many workers' suggestion that Friday be their one, non-negotiable 'in-office' day.

They believed home could play host to both independent and collaborative working.

"You do miss the social connection and facetime, and social interaction with your work mates every now and then." – AUS2

77%

of Australians said they missed the energy of their workplace, compared to 49% of the total sample)

Australians had access to more dedicated spaces than others.

They were more likely to report they had a dedicated space for working while at home, which afforded them greater privacy.

Research participants shared how having access to a private space (where they could close the door, and work with comparatively less interruption) was helpful in remaining effective.

They shared that this type of workspace setup was also helpful in maintaining 'mental space' between them and their work, at the end of the day.

71%

Had dedicated workspaces while working from home, compared with 63% of total sample

United States of America



265 million Americans began working from home in **late March**, when some states imposed early restrictions. Most workers were under restrictions due to **high rates of community transmission**.

While the participants of our study were all employed, it is important to recognise that millions of Americans have **lost their jobs** in the wake of restrictions. These people are also likely to have **lost their health insurance**, as a result of unemployment.

Work experiences should also be considered against the backdrop of America's recent past. **Americans were hard hit** by the 2008 financial crisis, and may be more sensitive to the risk of impending recessions.

(Despite this, Americans were no more likely to be concerned about job security than the total sample included in our survey.)

USA's remote work experience by the numbers:

>10% above the global average
About the same as the global average
>10% below the global average

Individuals

49%

of people said the **quality of social interactions worsened while working from home**, compared to 40% of the total sample

24%

of people **had no flexibility over when they worked**, compared to 28% of the total sample

44%

of people said their **work-life balance had improved**, equal to 44% of the total sample

Teams

51%

of people **previously worked with a co-located team**, compared to 54% of the total sample

11%

of people **thought their team worked worse together remotely**, compared to 13% of the total sample

42%

of people **thought their team worked better together**, compared to 40% of the total sample

Organisations

45%

of people **were more satisfied with their company leadership**, compared to 40% of the total sample

48%

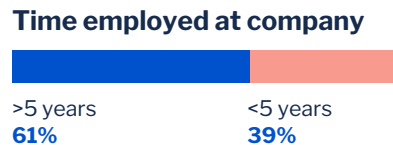
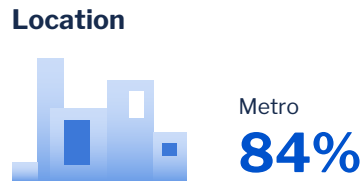
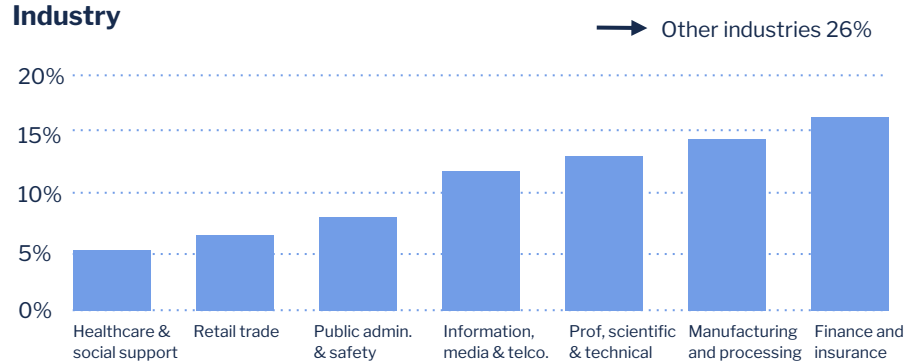
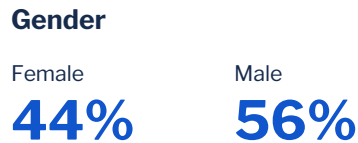
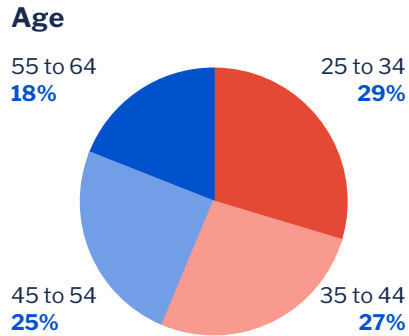
of people had **greater trust in their company to do the right thing by employees**, compared to 43% of the total sample

27%

of people **agreed the 'new normal' will only benefit businesses, not employees like me**, compared to 34% of the total sample

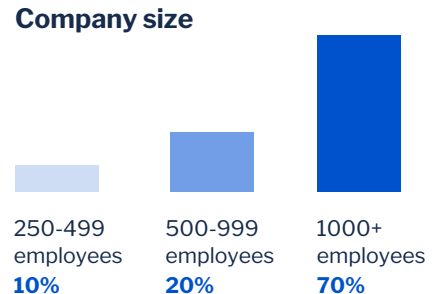
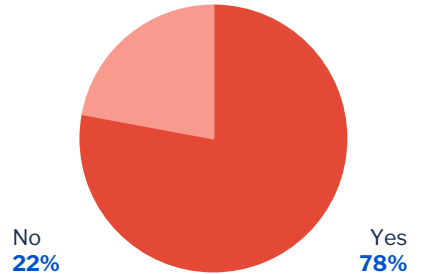
Who we spoke to in the USA

Working arrangements Full-time (30+ hours per week)



Homeschooling or caring for children during work day due to COVID-19 restrictions

Note: of people with children living at home (56% of total)

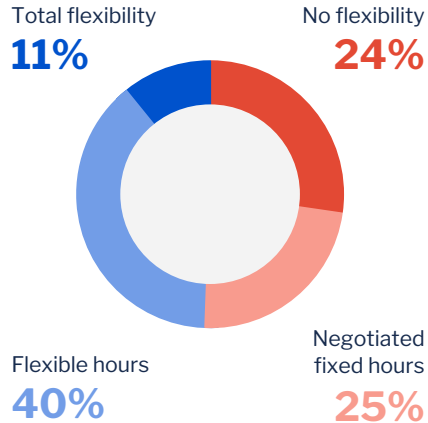


Work and home context in the USA

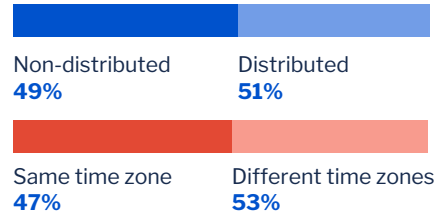
Commute time



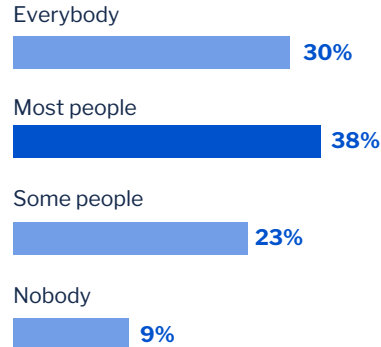
Flexibility



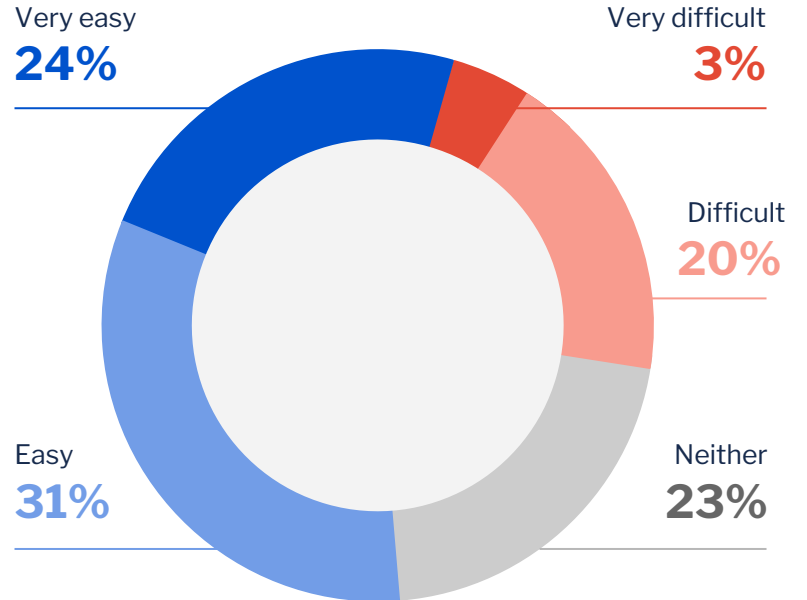
Team location



Number of people in the company working from home during COVID-19 restrictions



How easy or difficult has it been to effectively work at home during the COVID-19 restrictions?





Americans were more likely to want to work entirely from home (49%) than the total sample (35%).

Very few Americans (12%) would prefer a return to office.

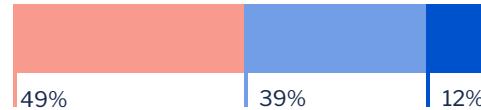
This is better understood when we consider that 67% of Americans are nervous about returning to the office without a vaccine in place, compared to 53% of the total sample.

Consider, also, the high number of Americans who believe their preferences would contribute to improved work-life balance (75%).

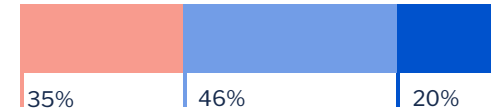
If you had a choice, where would you prefer to work at this current time?

■ I would prefer to work completely from home
 ■ I would prefer a mix of home and office
 ■ I would prefer to work completely from the office

United States



Global



49%

of people **wanted to work completely from home**, well above the global average of 35%

53%

of people who preferred to work at home would **even if they had to cover the added costs themselves**

75%

of people **believed they'd have a better work-life balance if they were allowed their preference**, compared to 68% of the total sample

USA: Identity

Americans are less concerned in revealing their home lives, and less reliant on 'performative cues' to feel professional

American participants in our research reported a strong sense of self from the careers they have, or are planning to construct.* In general, career ambitions were clearly articulated.

This focus on the 'work self' appears less reliant on the performative aspects of work. That is to say, Americans appear less likely to have performative 'work personas' than participants in other countries. This is demonstrated by survey results, showing half (51%) of Americans believe work routines are not essential to their identity, compared to 38% of the total sample.

Similarly, only 25% of Americans were concerned about 'exposing' their personal lives while remote working, compared to a third (31%) of the total sample.

*This dedication to the 'work self' is evidenced in the fact that [no large country](#) in the world, as productive as the United States, averages more hours of work a year.

Americans place less importance on the rituals of work in order to feel 'work ready'

25%

of Americans were **concerned about exposing their personal lives** to colleagues, compared to 31% of the total sample

51%

of Americans **disagree that work routines (such as becoming 'presentable' and commuting) contribute to their identity**, compared to 38% of the total sample

"(My subordinates) weren't used to (sharing themselves on video). It was a whole shift culture like that. (Then I began wearing costumes on screen). I even had my wife's wedding dress, and I'd come in with that on and just pop up to the screen. Now it's pretty much everyone used video. I think it's gotten people comfortable with it." -USA4

USA: Time

Americans appreciate the quality of life they have in remote work

Americans spoke appreciatively about the new flexibility and control they had over the ways they spend their time.

Many were finding new uses for the hours once wasted on commuting, finding car parks, and waiting in line for elevators or lunch. Interestingly, Americans were more likely to spend commute time on leisure and spiritual activities than the total sample, who were more likely to use this time to catch up on work demands and doing housework.

They also shared how they utilised 'micro-moments' for personal tasks during the day, which unlocked more time for recreation on weekends and in the evenings.

Survey results show Americans were more likely to have found appreciation for the quality of their life outside of work, since working from home.

74%

of Americans now **better appreciate the quality of life outside of work**, compared to just 66% of the total sample

"The most important thing I've gained from working from home is time, which equates to a happier personal life." – USA2



WFH snapshot: Working from home puts people in close proximity to many of the spaces and belongings that make them, 'them'. This participant enjoyed personalising their home office with plants.

*These findings are perhaps more understandable when we consider the country context, where workers receive an average of just [8 paid days a year for holidays](#).

USA: Relationships

Americans showed strong affinity with their organisations and leadership

Americans felt strongly connected to their organisations during this time. They had the second strongest measure of organisational trust (7.3), and their satisfaction with leadership had a higher rate of improvement (45%) compared to the total sample average (40%).*

Participants shared that their leadership had shown considerable care for their staff during these challenging times. New supports had been deployed (such as resource allowances; improved access to psychological services). Those existing supports, such as health insurance, were also more strongly appreciated.

Americans were more likely to believe these supports were demonstrations of company values.

“When you tell people who you choose to work for, you’re promoting them basically and condoning what they’re doing. (Purpose is) essential, because (the company is an) extension of me.” – USA2

45%

had become **more satisfied with their leadership since remote working had begun**, compared to 40% of the total sample

*These findings are supported by a study from Porter Novelli, showing many [Americans are looking to organisations to lead the crisis response](#) to the pandemic.

American teams are some of the most cohesive

Americans scored higher on measures of team cohesion (7.6) than every other country, bar Australia.

Americans were also significantly more likely to agree their team feels close to each other than the total sample (62% compared to 56%). This may be driven by American participants comfort with sharing ‘unprofessional’ sides of themselves with their team.

Many shared how they had been consistently in communication about their personal or family lives, their interests, and their remote working challenges. This openness was commonly encouraged by leadership, who often led by example in efforts to build rapport.

“It’s good for rapport building - you’re technically alone but you’re hearing more about co-workers’ lives. Perhaps because the circle is smaller, it opens up opportunities to talk about new and more intimate things.” – USA2

62%

of Americans **felt closer to their team while working remotely**, compared to 56% of the total sample.

*These findings are supported by a study from Porter Novelli, showing many [Americans are looking to organisations to lead the crisis response](#) to the pandemic.

USA: Workplace

American's familiarity with remote work helps them adapt

American participants had greater experience with remote working practices. Many attributed this to their organisations having multiple offices across the states, and/or some overseas operations.

Participants were generally comfortable using video conferencing, collaboration tools, and aligning disparate schedules

This may contribute to some three quarters (73%) of Americans believing their teams were well prepared to continue remote working.

“Over time, jobs began being moved out of the country, and the number of people working (in head office) became less. But, also, more people became what they called ‘agile’ workers, meaning people would work from home part-time. So nothing’s really changed.”

– USADS

49%

of Americans **worked in a distributed team prior to COVID-19**, compared to 46% of the total sample.

73%

of Americans **believed their teams were well prepared to continue working from home**, equal to the total sample

Americans are very concerned about the safety of return to office

They were largely unappeased by their companies' plans to implement health and safety practices, such as enforcing physical distancing and providing PPE gear.*

They were also more likely to believe that these measures would detract from the value of co-location.

These factors may contribute to the fact that half (49%) of American people want to continue working fully remote (as opposed to a mix, or fully in office), compared to just 35% of the total sample.

“I would prefer to work remotely until a vaccine is developed and distributed. My partner has a health condition and if possible I would like to continue to limit all outside contact until that time.” – USADS

68%

of Americans **were nervous about returning to work in the office while no vaccine exists and restrictions are still in place**, compared with 53% of the total sample.

*Americans' concern over health and safety is better understood when we consider the [high rates of infection](#); community transmission in their country.

Japan



Japan

Preparations for the 2020 Olympics meant remote working at scale was always on this year's agenda for Japan - the shift just came sooner than planned.

Japan's COVID-19 experience differed considerably from the other countries studied in that broad, economy wide, government mandated lockdown measures were never implemented.

Instead, businesses and individuals were asked to display 'jishuku' – or self-restraint and avoid environments such as packed commuter trains, offices and entertainment venues where close community contact was unavoidable.

As a result, Japan never experienced the same level of long term disruption as other territories, with many workers already back in the office at the time of our study.

Japan's remote work experience by the numbers:

>10% above the global average
About the same as the global average
>10% below the global average

Individuals

51%

of people had **only rarely worked from home**, compared to 43% of the total sample

39%

of people **had no flexibility over when they worked**, compared to 28% of the total sample

31%

of people reported **being more satisfied with their work-life balance**, compared to 44% of the total sample

Teams

64%

of people **previously worked with a co-located team**, compared to 54% of the total sample

23%

of people **thought their team worked worse together remotely**, compared to 13% of the total sample

17%

of people **thought their team worked better together**, compared to 40% of the total sample

Organisations

18%

of people **were more satisfied with their company leadership**, compared to 41% of the total sample

19%

of people had greater **trust in their company to do the right thing by employees**, compared to 43% of the total sample

22%

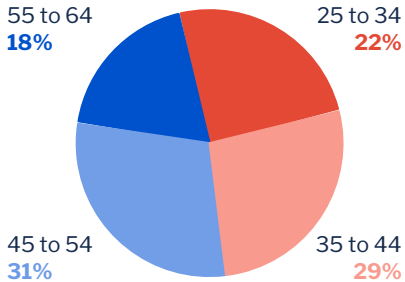
of people **agreed that the 'new normal' will only benefit businesses, not employees like me**, compared to 34% of the total sample

Who we spoke to in Japan

Working arrangements

Full-time
(30+ hours per week)

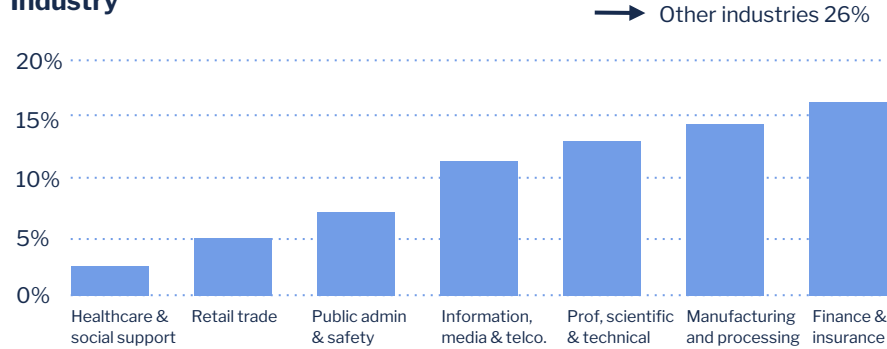
Age



Gender



Industry



Location



Time employed at company

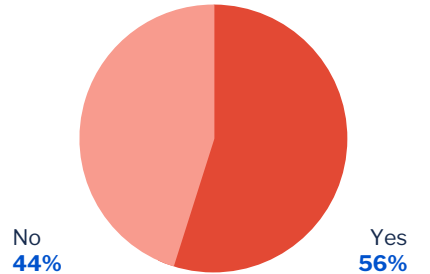


Role

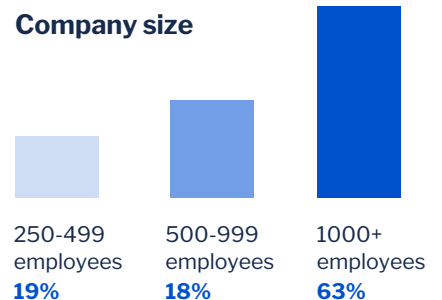


Homeschooling or caring for children during work day due to COVID-19 restrictions

Note: of people with children living at home (59% of total)

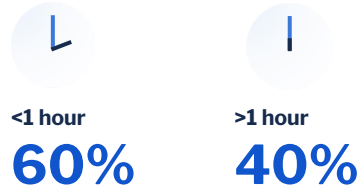


Company size

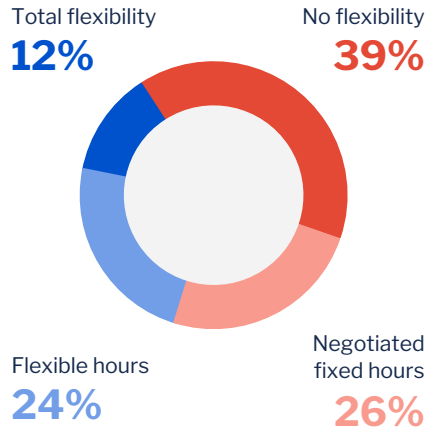


Japan's work and home context

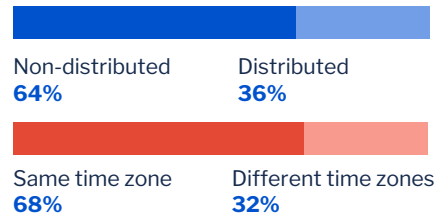
Commute time



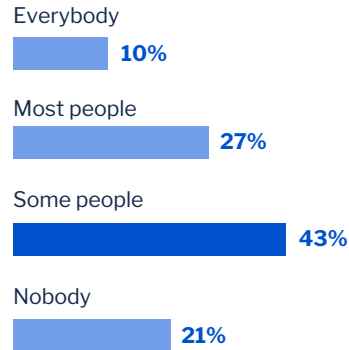
Flexibility



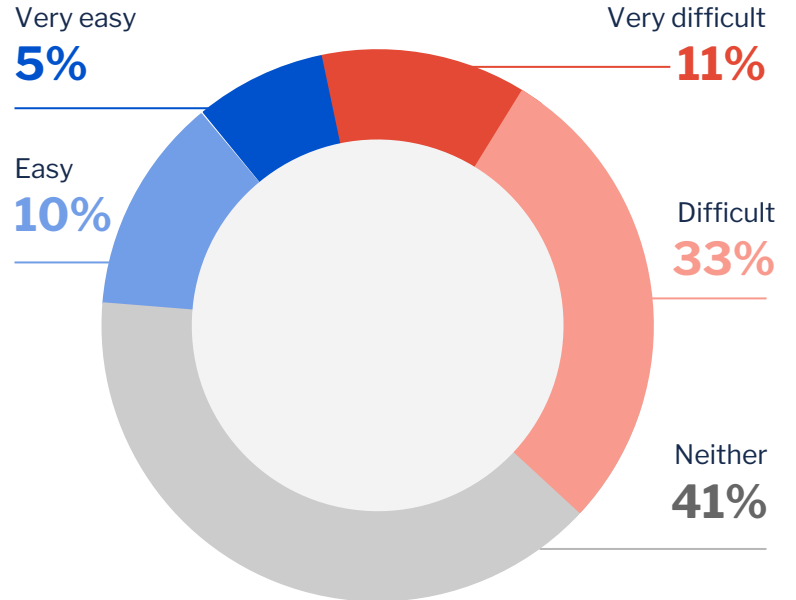
Team location



Number of people in the company working from home during COVID-19 restrictions



How easy or difficult has it been to effectively work at home during the COVID-19 restrictions?



Japan

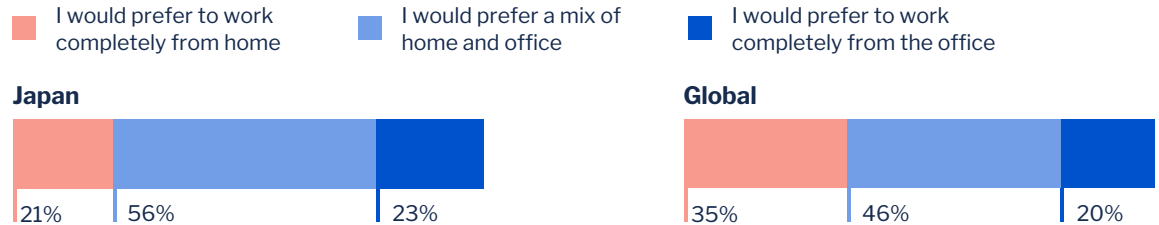
Japanese workers are more likely to be planning a return to the office

Japan's post-covid preferences indicate a heavier bias towards office-based and hybrid work styles compared to the rest of the countries sampled.

The relatively small size of Japanese homes, the difficulties associated with adapting analog, paper-based business processes and a general lack of business preparedness all suggest the office will continue to play a dominant role in Japanese worklife.

When viewed through a workplace culture lens, many equate the need to be visible and present within a physical space as being synonymous with being loyal and dedicated workers.

If you had a choice, where would you prefer to work at this current time?



44%

of people **found working from home difficult**, compared with 27% of the total sample

43%

of people **disagreed with the idea of being annoyed that it took a pandemic to allow them to work from home**, compared with 25% of the total sample

48%

of people **did not believe their organisations were well prepared for remote working**, compared with 29% of the total sample

Japan: Identity

Fathers are split on their remote work experience

Male caregivers shared the transformative experience of working in close proximity to their children. They enjoyed being more present in their lives, and found new appreciation for the challenges of care duties.

About as many fathers sought a return to office, as did their non-caregiver counterparts. This statistic is perhaps more interesting when we consider the typical absence of Japanese men in care responsibilities: despite having a generous 12-month paternity leave arrangement in place, only 6.1% of fathers took up the offer in 2017.

“Whenever possible, I think I work from home. It eliminates the time and stress of commuting to work and allows me to spend a little more time with my family. I believe it is a great motivator.”

- JPDS

25%

of Japanese men with children would prefer to work in an office, compared with 21% of men without children

Japan: Time

Presenteeism is replaced by shadow work or ‘service time

Many managers shared their efforts to limit the hours their team were spending on work, while remote.

But many individual contributors looked for ways to circumvent the digital evidence of after-hours activity in order to appear more productive during work hours.

“I want to project the impression that I’m a person that gets things done within my work hours. I report “I’m done for the day” but I’m actually not done and will continue to work after that. My technique to disguise [working late] is to only save [the PowerPoint presentation] in the morning.”

- JP4

42%

of people believe remote working means working similar hours, compared to 28% of the total sample

Japan: Time

A reliance on traditional, paper-heavy processes and outdated tech such as faxes slowed the transition to remote

Japan's reliance on paper-based records and technology such as faxes created a unique set of challenges in their transition to remote working.

In particular, the effort and time required to authorise documents with official 'hanko' seals emerged in both our interviews, and recently in public discourse as government and business groups push for digital alternatives.

"I went to the office just once, to pick up my official seal, and I had to get permission from my superior and the head of department. The process was a big hassle" - JP5



Individual 'Hanko' or 'Ikan' stamps are a cornerstone of Japan's paper-heavy business processes and are often required on official documents to verify identity.

44%

of Japanese found working from home difficult, compared with 27% of the total sample

48%

of Japanese survey participants felt their business wasn't prepared for remote working. Compared with 29% of the total sample

Japan: Relationships

The limitations of tenure-based career progression are becoming clearer

Advancement in Japanese firms has long been linked to seniority and tenure. However, the switch to a more readily monitored form of remote working exposed previously hidden performance disparity within some teams.

As a result, some managers were beginning to question the merits of a traditional 'one size fits all', tenure-based approach to rewarding talent.

“Now we have a much clearer visual on individual skill differences in people, which complicates things.

There's also the issue of how to compensate people on a skills basis; it's out of my control.” - JPI2

81%

of Japanese workers had **been with their company longer than 5 years**, compared with 61% of the total sample

Translating a work culture built around subtle behavioural cues to online was difficult

The ability to 'read the air' or 'kuuki o yomu' is deeply ingrained in Japanese culture - something that many have struggled with in the transition to digital forms of communication.

On the other hand, some found the ability to focus on the material details refreshing - allowing for more rapid decision making and consensus building.

“There's a gray zone there that could be interpreted differently depending on the reader, so you have to be indirect in what you say and take a roundabout approach.” - JP2

“Physical meetings held in the conference room make me nervous sometimes because of the atmosphere and the expressions of the participants in the meeting.” - JPI3

Japan: Workplace

The small size of many Japanese apartments lead to both physical and psychological discomfort

While many of our respondents from other geographies managed to carve out a semi-permanent location in the home for work, the small size of Japanese apartments made this particularly difficult, forcing compromises on productivity and comfort.

Missing both the physical demarcation between work and home, along with the 'transition times' associated with a commute caused many to also struggle with the mode switch between work and relaxation activities within the home.

“Because I am sitting on the floor with a lower table while working, I have pain in my back and legs. I cannot concentrate. The space isn't big enough to put a proper desk and a chair. I need to move apartments if I continue to work at home in a longer period.” - JPDS 1

“Presently, I'm working in the living room where my TV and sofa is, so I'm basically working where I'm usually relaxing, watching movies or eating my meals, so I want a separate space where I can focus on work.” - JP 5

45%

of Japanese respondents described their home work environment as **ergonomically worse than their office**



WFH Snapshot: Having to work in spaces typically used for relaxation had a negative impact on both activities



WFH Snapshot: A typical, 'ergonomically compromised' Japanese home workspace

Germany



Germany

Germany demonstrates better work-life boundary setting than other European countries but remote working prior to COVID-19 was lower than other EU states.

During the pandemic, it is reported that 35% of the workforce worked from home. Maintaining its leadership in areas of gender parity, life satisfaction and work-life balance will be key to the expansion of remote working - or as Germans call it: 'Homeoffice'.

While limiting social contact and working from home continues to be encouraged by the German government, restrictions were lifted on June 17, two days before our qualitative research started.

Some German participants had begun transitioning back to working from the office some days of the week at the time of our research, which might have contributed to the noticeable sense of optimism in people's attitudes.

Germany's remote work experience by the numbers:

>10% above the global average
About the same as the global average
>10% below the global average

Individuals

20%

of people **found it difficult to work from home**: the lowest score across the territories we surveyed.

20%

of people **worked from home full time** prior to COVID-19, compared to 14% of the total sample

44%

of people reported **better satisfaction with their work-life balance**, compared to 44% of the total sample

Teams

46%

of people **previously worked with a co-located team** - compared to 54% of the total sample

13%

of people thought **their team worked worse together remotely** compared to 13% of the total sample

40%

of people **thought their team worked better together remotely**, equal to the total sample

Organisations

40%

of people **were more satisfied with their company leadership**, equal to 41% of the total sample

44%

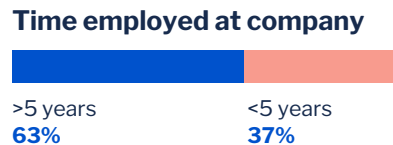
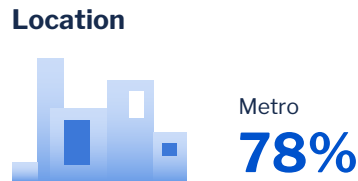
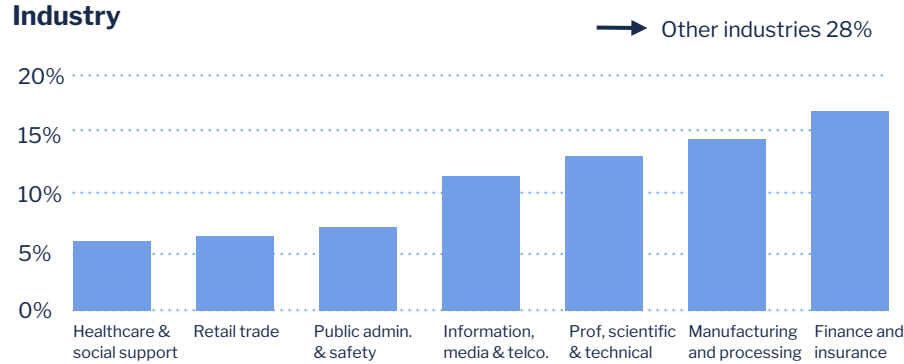
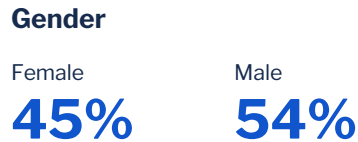
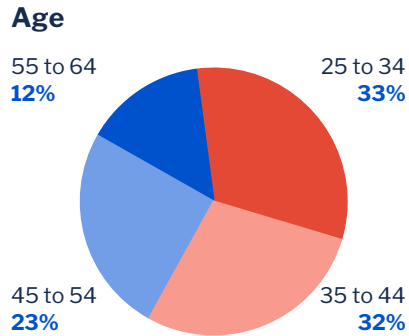
of people said they had more **trust in their company to do the right thing by employees**, equal to 43% globally

25%

of people **agreed that the 'new normal' will only benefit businesses, not employees like me**, compared to 34% of the total sample

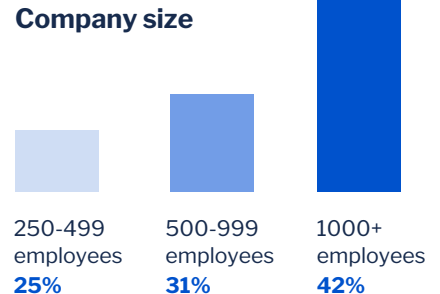
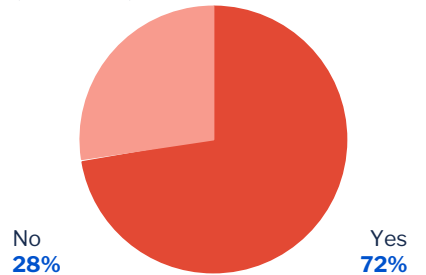
Who we spoke to in Germany

Working arrangements Full-time (30+ hours per week)



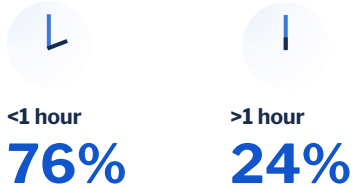
Homeschooling or caring for children during work day due to COVID-19 restrictions

Note: of people with children living at home (46% of total)

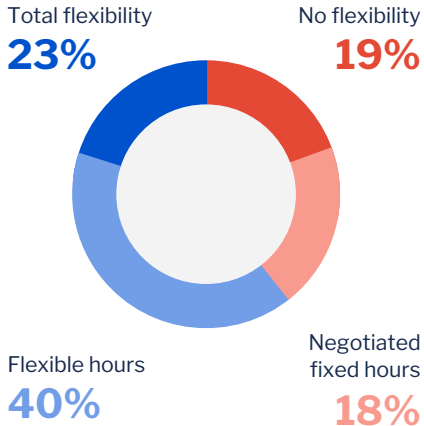


Germany's home and work context

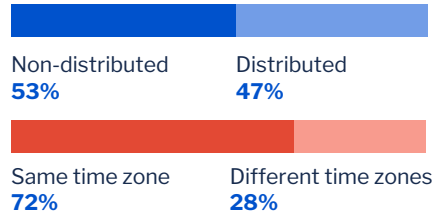
Commute time



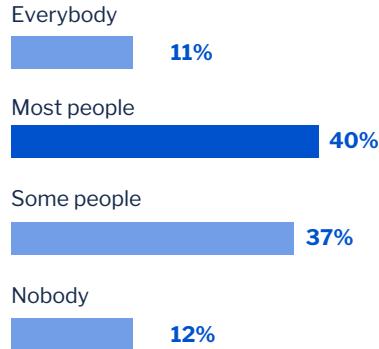
Flexibility



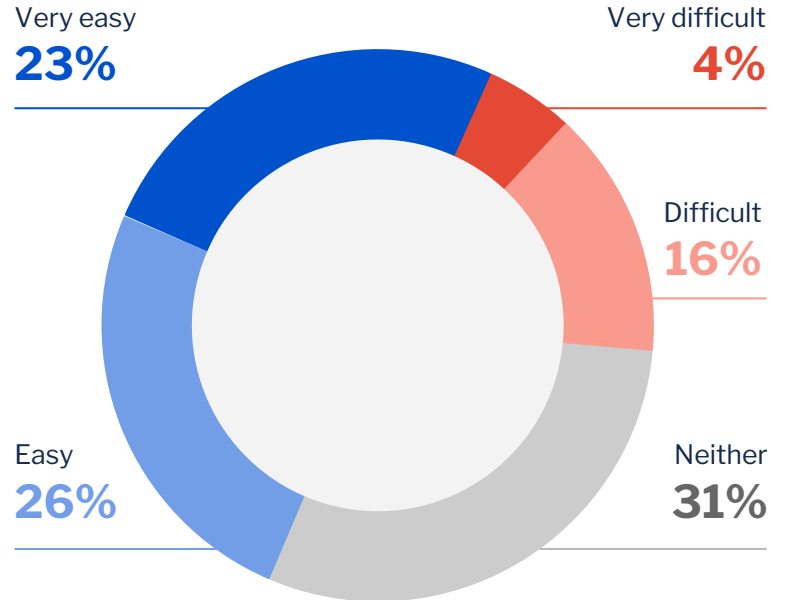
Team location



Number of people in the company working from home during COVID-19 restrictions



How easy or difficult has it been to effectively work at home during the COVID-19 restrictions?



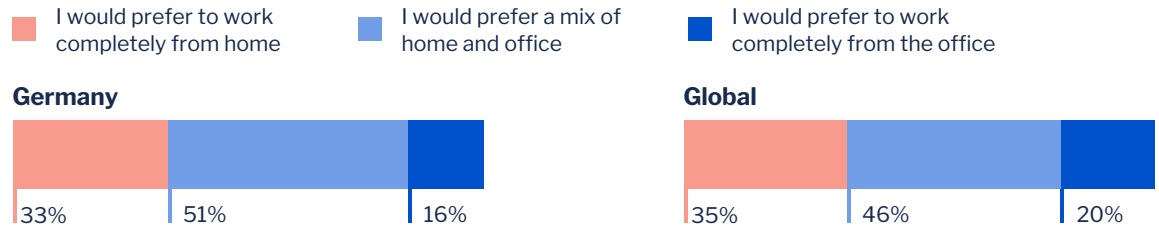
Germany

Germans found it easier to be effective while working remotely than the total sample.

Germans had a strong desire to work from home in some capacity. This is also evidenced in almost half (45%) of Germans saying they were frustrated that their organisations hadn't enacted remote practices earlier.

Note that almost a third (29%) of German respondents were not confident in their organisation's remote working readiness.

If you had a choice, where would you prefer to work at this current time?



20%

of people **found working from home difficult or very difficult**, compared to 27% of the total sample

45%

of people **were annoyed that it took a pandemic to allow them to work from home**, equal to 47% of the total sample

29%

of people **did not believe their organisations were prepared for continued remote working**, compared to 29% of the total sample.

Germany: Identity

Germans maintained a pragmatic attitude throughout the changes brought about by the pandemic.

They were focused on pressing forward and ‘rolling with the punches’, overall expressing satisfaction with their employers and working from home situations.

Germans were less likely to articulate strong career ambitions or question their living situation in response to the pandemic.

“I hope to work a little less than I do at the moment. I do not have any career goals as such. I have no ambitions to go even further up the career ladder than I already have. It all just involves more work - which I can certainly do without (if I want a) fulfilled private life.” - DE1

31%

Germans found it neither easy nor difficult to work effectively at home during restrictions, compared to 20% of the total sample

Germany: Time

German managers noted teams were working in an increasingly autonomous fashion.

While this new found freedom in autonomy was well received by most, when working from home is a challenge individuals reported they needed more direction from management.

Though a high level of trust exists between employee and employer, those who are struggling to work remotely need greater support from their organisation.

“I have learned about myself that I work on problems longer and then solve them myself instead of quickly asking colleagues. Even if it sometimes takes longer, I still find it positive!” - DEDS

32%

would need to receive more clarity & direction to perform day-to-day duties, of those who state they're unprepared to continue working from home

Germany: Relationships

German managers found working remotely more difficult than other roles, and expect future challenges managing a team remotely.

There is a cultural expectation that managers are physically present in the office, and it is anticipated this expectation will continue even as teams adopt hybrid working modes.

Managers anticipate the quality of leadership and support they provide to suffer from the lack of personal contact and expressed a preference to work from the office in order to 'perform' their duties adequately.

“As a supervisor I should simply be present in the company. I look after my department and I want to show other departments that I always have an ear for my colleagues.” - DE DS

20%

German managers had a preference to return to the office, compared to 14% of other role types in the total sample

24%

of German managers found it difficult to work effectively at home during restrictions, compared to 16% for other role types in Germany

Germany: Relationships

Germans believed their organisations responded appropriately to maintain workflow and employee wellbeing.

Reporting both satisfaction and trust in their employers, Germans are feeling more committed to their companies.

They expressed a feeling of solidarity and stronger bonds with their employers are a result of the pandemic.

“My company reacted fast, well and reassuring - that was very important. I was already happy with the company. But the reassurance gave me another little push. You can work more stress-free this way.” – DE5

44%

of Germans **trusted their company more to do the right thing by their employees**, much the same as 43% of the total sample

37%

of Germans are **now more committed to their job and their company**, compared to the total sample

Germany: Workplace

German interview participants shared greater confidence in their organisation's likelihood to support their workplace preferences.

Survey responses demonstrate this belief, regardless of whether the preference was to return to office or continue working from home.

While companies are well set up to accommodate remote work, working from home was the exception prior to COVID-19 restrictions*.

“For my job and employer I find it hard to imagine that there will be a 100% return to a normal full-time week in the office. The employer could save on rent while increasing employee satisfaction.” – DE DS

63%

have flexibility and autonomy over their work hours, compared to 47% of the total sample

*Germany's presence culture has persisted that family-focused workers did 'homeoffice' not people who are career-focused. Working from home has previously been an underutilised 'perk' or 'bonus' rather than a genuine change of attitude towards home working.

France

France

France's 8-week enforced work from home or 'télétravail' experience began in mid march following a stay-at-home order from the French Prime Minister.

During this time French workers experienced the same challenges of juggling work and home life, home schooling and the needs of partners and housemates as the other territories we studied.

Where the French context differs most however, is the stringent worker protection rules and legislation that have come into force in recent years. These include a 35-hour working week, the legal right to work from home along with protections from having to respond to work related communications outside of work hours.

As a result, French workers largely managed the disruption well, with less reported intrusion into care and personal time as seen at a global level.

France's remote work experience by the numbers:

>10% above the global average
About the same as the global average
>10% below the global average

Individuals

24%

of people reported **improved job satisfaction as a result of the restrictions**, compared to 35% of the total sample

37%

of people **were not concerned about job security or career progression**, compared to 24% of the total sample

38%

of people **were nervous about going back to the office while there's no vaccine**, compared to 53% of the total sample

Teams

20%

of people **were worried about what their home life looked like to their colleagues**, compared to 31% of the total sample

36%

of people **found working from home easy**, compared to 53% of the total sample

61%

of people **reported a strong feeling of unity and cohesion in their team** - on a par with the total sample

Organisations

27%

of people **were more satisfied with their company leadership**, compared to 41% of the total sample

76%

of people **hopeful that organisations would reassess their priorities and move away from simply thinking about the bottom line**, compared to 66% of the total sample

76%

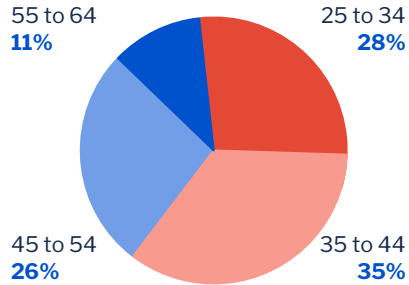
of people **hopeful that organisations would reassess their priorities and move away from simply thinking about the bottom line**, compared to 66% of the total sample

Who we spoke to in France

Working arrangements

Full-time
(30+ hours per week)

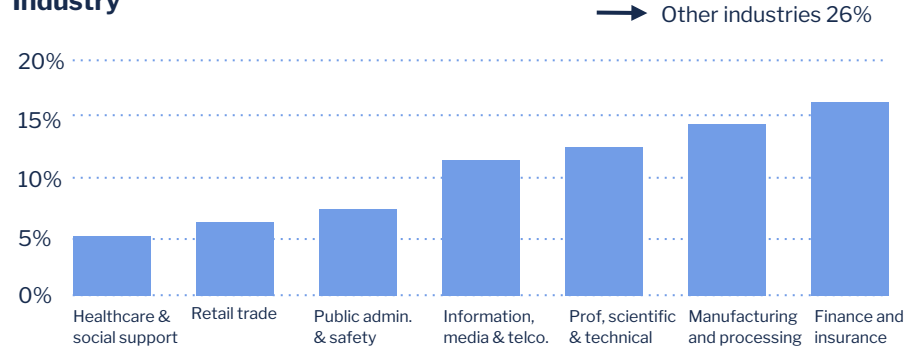
Age



Gender

Female **52%**
Male **48%**

Industry



Location



Time employed at company

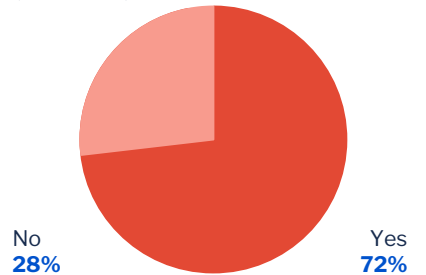


Role

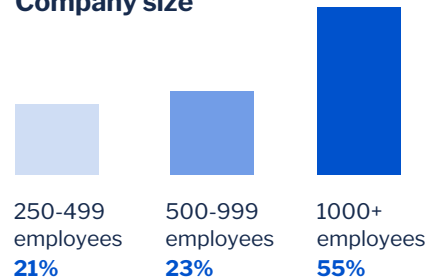
Manager **37%**
Individual contributor **63%**

Homeschooling or caring for children during work day due to COVID-19 restrictions

Note: of people with children living at home (41% of total)

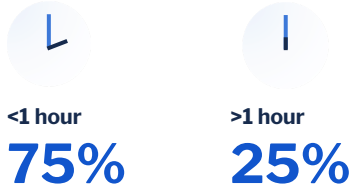


Company size

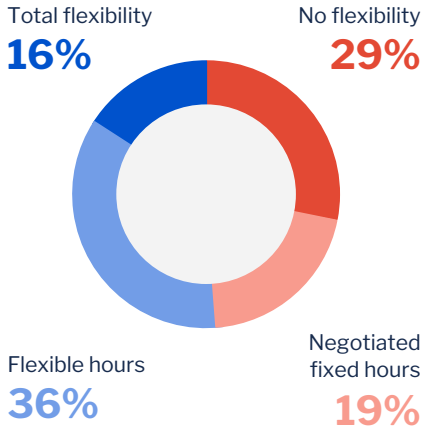


France's work and home context

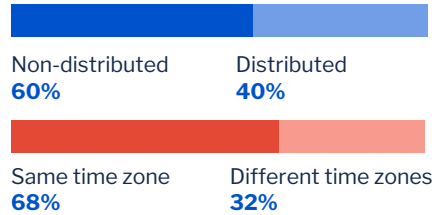
Commute time



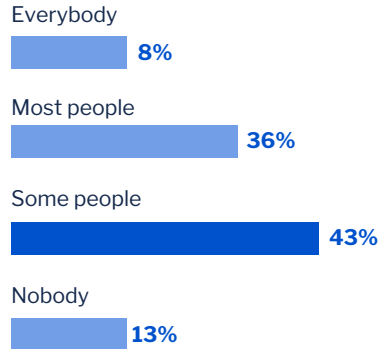
Flexibility



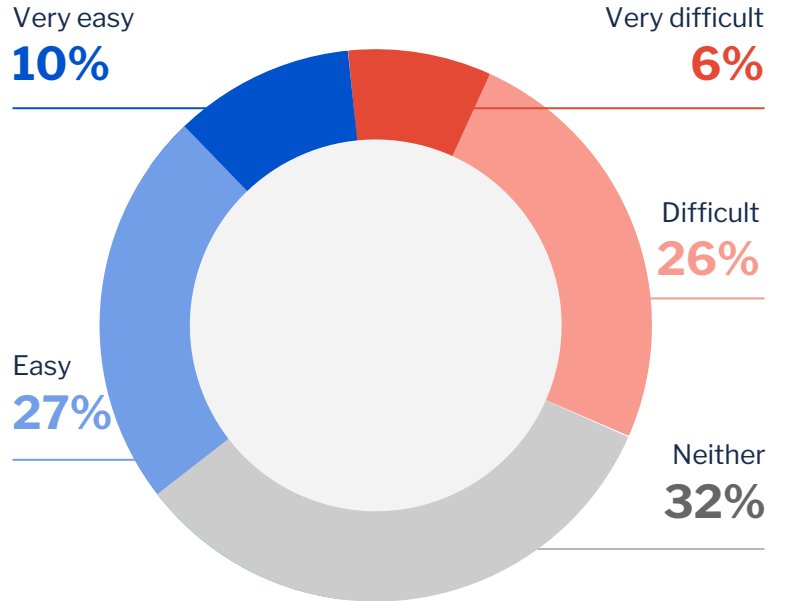
Team location



Number of people in the company working from home during COVID-19 restrictions



How easy or difficult has it been to effectively work at home during the COVID-19 restrictions?

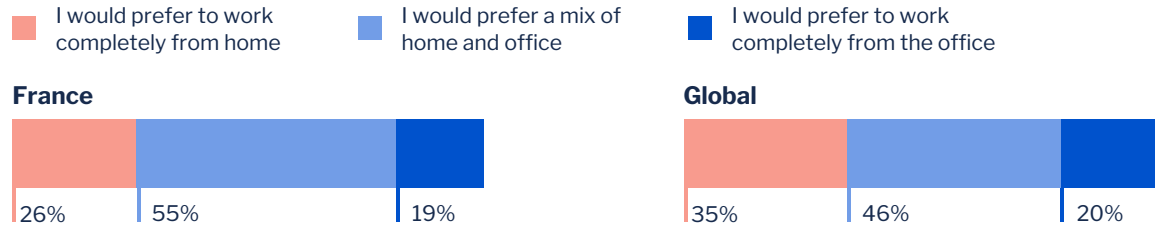


France

French workers see greater value in a hybrid approach

While the preference for working exclusively from the office is in line with the global average, the French differ most in their preference for a hybrid situation over that of working entirely from home.

If you had a choice, where would you prefer to work at this current time?



38%

of people **were nervous about going back to the office while there's no vaccine**, compared to 63% of the total sample

30%

of people **were no longer working from home** - sharing top place with Japan for those who've already returned to the office

34%

of people who preferred office-working **felt strongly about their decision**. Little would dissuade them from their preference

France: Identity

Managers take a more active role, provide direction

Many managers reflected on having to adjust their role within the team when working remotely: shifting from a paternalistic, organising influence to one focused on providing direction, and then supporting workers to achieve against objectives in their own fashion.

This shift is in line with data from the survey, indicating support and clarity of direction being high on the list of requirements for those struggling with the shift to remote work.

“What the team needs is for me to be a little less behind them, and to give them a little more freedom.”

- FR2

28%

of French **who were not ready to work from home required more support and training**

Uncertain times created new opportunities for those able to display empathy and adaptability

The dramatic change in market conditions coupled with the forced move to working from home created opportunities for those able to embrace the change and adapt quickly.

An ‘all hands’ approach and more open communication channels created opportunities for people to bypass traditional reporting structures and impress senior leaders.

“Because of the remote communication, my [Manager’s superior] was in the loop and discovered my skills. I could indirectly show that I am collaborative and open enough to contribute to the department as a whole. I was able to lend a hand, and the hierarchy could see that I could be flexible and work outside of my team.” - FR4

41%

of French **felt that acting with empathy and care for others was more important** when working remotely

41%

of French **felt that effectively communicating with others in my company was more important** when working remotely

France: Relationships

Most French were happy with the way their organisation's demonstrations of care - and want the newfound openness to remain

The way in which organisations adapted to remote work was viewed positively by the majority of French participants. Many remarked on clear lines of communication and the free flow of (previously closely-held) information between head and regional offices; management and individual workers.

Participants also shared examples of French businesses taking active steps to assist those with complex households, in particular those looking after children. There is a strong desire for this 'more human' and open style of business to persist.

“They paid close attention to those who had pressing home priorities. I found them very benevolent when I had low expectations. I was quite happy.” - FR2

76% were **hopeful their organisations will reassess their priorities and move away from simply thinking about the bottom line**, compared to 66% of the total sample

France: Time

French struggle to adjust to asynchronous working

French participants found it more difficult to bear the encroachment of work on personal time.

Total sample results showed most workers found it easier to balance the needs of home and work while remote.

Unfortunately, French people gained less freedom, with only a third (33%) believed it had become easier to manage these disparate needs.

People's struggles to introduce work into the home are also demonstrated by the fact almost a third (29%) believed it was harder to stop thinking about work even at the close of the working day, than it was previously.

“In terms of working hours during the first month, it was quite complicated. I was often on my phone and I took calls when they called me at noon. It was complicated to stop.” - FR4

33%

of people **found it easier to balance home and work demands** compared to 41% of the total sample

29%

of people **said it was harder to stop thinking about work in their own time**, compared to 23% of the total sample. The French were almost twice as likely to say it was ‘much harder’ the total sample.

France: Workplace

People have strong familial connections to regional homes and towns

For those able to make the shift, abandoning city centres in favour of regional or rural family homes was common during the restrictions.

This often brought multiple generations under the same roof bringing additional household complexity.

For those who remained, the inability to connect with and draw upon the support of family networks was keenly felt.

“Normally I live alone in an apartment and since the beginning of confinement I returned to my parents’ home. My parents also did telework at the start of confinement.” - FR1

“On the family front, I am Belgian and my whole family is in Belgium. With the borders being closed since March, I have not been able to see my family.” - FR4

French want to work a mix of home & office

As with the other countries, respondents expressed a variety of views at the prospect of returning to the office with the majority opting for some form of hybrid arrangement

The French shared a more common desire to retain some form of remote working, recognising that the office they returned to would be vastly different.

When contemplating a return, it was assumed the office environment would be greatly changed. This change was thought of less in physical terms and more often associated with the once familiar social rituals and behaviours that would now be lost.

“We will no longer be kissing on the cheek. I think they will remove the sofas and the small lounge, and that coffee will be taken in the offices.” - FR4

55% of French **wish to work in a hybrid fashion**, compared to 46% of the total sample

Project Aims & Methodology

Research Questions

Project goals

1. Understand how work practices, attitudes and behaviours have changed in response to the pandemic
2. Compare changing attitudes and behaviours across Australia, Japan, France, Germany and the USA
3. Identify the impact of the pandemic on teams and individuals':
 - Use of specific tools and systems
 - Ways of working
 - Productivity
 - Motivation
4. Understand the changing needs, hopes and expectations of workers as workforces transition back

Research questions

In response to COVID-19:

1. What's changed about the ways individuals, teams and organisations work?
2. What's driving differences in experience, or how well people adapt to these changes?
3. What does this mean for how people think about their work futures (hopes, needs and expectations)?

Methodology

Our research was designed to provide immediate insight and a repeatable framework for longitudinal insights.

Interviews

We conducted 32* in-depth remote interviews via Zoom. Each interview lasted approximately 60 minutes.

The interviews were designed to explore:

- pre-covid workplace roles and experiences
- most significant changes and challenges from working remotely due to the pandemic
- Hopes for the future within a post-pandemic workplace

Our research also included a number of research sessions where we shared findings of the above topics with our research partners:

- Atlassian
- ANZ

Diary Studies

We conducted five separate Diary Studies over a two-week period. During that time, we recruited 67 participants across the five key geographies.

This study allowed us to get a live snapshot of work life over an extended period of time. This component provided us with:

- Rich examples of the frustrations and successes of remote collaboration as they happened
- Direct insights regarding the tools and software used by participants for remote collaboration
- Deeper reflections on working from home and the effects it had on home life
- Expectations for what the future holds and how that might affect the way they work moving forward

Quantitative Surveys

We surveyed 5,184 knowledge workers who worked remotely during the COVID-19 restrictions across each of the five key geographies.

The 15-minute, multilingual online survey ran from 7 to 27 July 2020. Its primary purpose was to contextualise and challenge some of the key findings that emerged from the qualitative research streams. It covered topics such as:

- Organisational trust
- Work-life balance
- Job satisfaction
- Team cohesion
- Future workplace

It was designed to capture point-in-time measures, remain responsive to the emerging context and enable longitudinal tracking capability beyond this initial study.

*Including 5 staff from participating partner ANZ

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