

How Work has Changed:

*The Lasting Impact of COVID-19
on the Workplace*



COVID-19
WORKPLACE COMMONS

ASU Arizona State University

WORLD
ECONOMIC
FORUM

WITH SUPPORT FROM

The ROCKEFELLER
FOUNDATION

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The College of Health Solutions translates health research and discovery into practice and prepares students to address the challenges facing people to stay healthy, improve their health and manage chronic disease. We offer programs in biomedical informatics and biomedical diagnostics; kinesiology, sports and exercise science; health care delivery; nutrition; population health; and speech and hearing science. The college's online master of science in biomedical diagnostics degree is the only program of its kind worldwide and is designed to address the role of diagnostics in research, clinical decision making and policy. Students, faculty and staff work together toward a common goal of improving health outcomes by optimizing health and human performance across the lifespan and addressing systems of health care and health needs of populations. Our graduates are uniquely prepared to make an impact in the health workforce and shift the focus of health from sickness to wellness. Visit chs.asu.edu to learn more about how we are reimagining the future of health.

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The World Economic Forum is the international organization for public-private cooperation. The Forum engages the foremost political, business, cultural and other leaders of society to shape global, regional and industry agendas. It was established in 1971 as a not-for-profit foundation and is headquartered in Geneva, Switzerland. It is independent, impartial and not tied to any special interests.

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Executive Summary



Eighteen months into the COVID-19 pandemic, employers have redefined virtually all aspects of the workplace environment from the fundamentals of where employees work to the details of how everyone communicates. Employers are now being called upon to play a proactive role to help forge a path out of the pandemic beyond their own top and bottom lines.

Employers, at least larger ones, are embracing this role. They are bringing their employees back to the workplace slowly but steadily with a clear acknowledgement of the importance of COVID safety protocols. Why do we believe this? We see that more than 90%

are requiring or encouraging vaccination - we see that 70% are testing regularly. We see that 73% are acknowledging the importance of employee mental health. But we are not overly optimistic. We see the deep divide in our nation playing out in the workplace too. We see that employees resign from both sides of the spectrum - 61% of the time because employers have no or too lax COVID policies and 39% because those same policies are considered too restrictive.

This Report, *How Work has Changed: The Lasting Impact of COVID-19 on the Workplace*, features results from the third and final survey in a three-part series within the ASU Workplace

Commons initiative featuring an innovative and interactive data dashboard enabling access to anonymized survey data from the current survey as well as the Fall 2020 and Spring 2021 surveys. Responses to the survey came from employers in 23 industry sectors, 1,470 companies in 1,626 facilities. Approximately 78% of responses are from large businesses with 250 or more employees, and 93% of responses coming from companies based in the U.S. and U.K.

In summary, this survey demonstrates how far we have come while reminding us that we still have a long road ahead.



Methodology

The COVID-19 Workplace Commons - Keeping Workers Well survey was distributed to companies and trade association leaders aged 18+ in 23 industry sectors in 40 countries on six continents. The survey was conducted online between August 2, 2021 and August 20, 2021 in English and approved by Arizona State University's Institutional Review Board (IRB). The survey contained 113 questions within six broad categories including testing and contact tracing, vaccination, employee wellbeing, the future of work, pandemic response and preparedness,

and financial impact. Respondents were informed that their participation would remain anonymous and confidential and were given the ability to skip any question within the survey. Ipsos, a global leader in market research, assisted with securing a majority of survey responses, resulting in 1,561 completions through the use of multiple panels across various industry sectors in English-speaking countries with an emphasis on companies located in the U.S. or U.K with at least 250 employees. An identical publicly available survey resulted in 65 completions. Excluding responses

with less than 90% completion rate, the survey resulted in 1,626 valid responses. Survey data were examined, including categorization of qualitative responses (e.g. 'Other - please specify') and transformation of variables for areas like industry sector and dates. ASU's Decision Theater summarized results and the data featured on the COVID-19 Workplace Commons website dashboard represents valid responses.

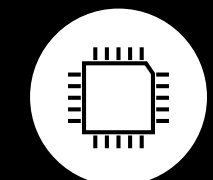
113
Questions

1,626
Valid responses



Survey Overview

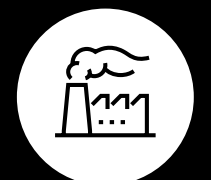
Top 10 industries represented in rank order (Left-Right, Top-Bottom)



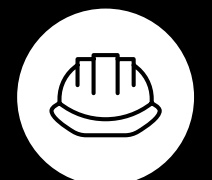
Technology and Software



Business + Professional Services



Manufacturing



Construction



Retail Stores



Healthcare, Hospitals, and Clinics



Government and Quasi-Public



Education (Colleges & Universities)



Energy & Utilities



Consumer Retail Services

93%
are from US and UK
(70% US / 23% UK)

78%
250 or more employees
(n=1,264)

37%
1,000 or more employees
(n=604)

Our Top Insights

Vaccination

- **93%** of employers currently require or encourage COVID-19 vaccination for employees
 - **61%** require some or all employees to be vaccinated against COVID-19
 - **32%** encourage but don't require employees to be vaccinated
- **56%** require proof of vaccination
- **68%** encourage proof of vaccination
- **55%** offered incentives to encourage employees to be vaccinated



Workplace Policies

- **39%** had employee resignations due to COVID workplace policies
 - **42%** lack of workplace safety policies
 - **17%** existing workplace policies not being stringent enough
 - **39%** overly restrictive workplace policies
- **35%** terminated an employee due to COVID workplace policies



Future of Work

- Anticipated work environment in the future is hybrid (**42%**), physical (**32%**) and virtual (**25%**)
- **25%** plan to downsize, **6%** plan to no longer offer a physical workspace while **15%** plan to increase physical workspace
- **61%** intend to allow their employees work from home full-time through 2021
- **63%** believe that employees should be in the office at least 20 hours per week
- **66%** intend to offer more flexible or expanded work from home policies



Testing

- **70%** of employers are testing with the vast majority of tests being viral tests
 - **46%** test weekly and **27%** test daily
- Test technology varies significantly for viral testing
 - **41%** use both PCR and Antigen tests
 - **39%** PCR only
 - **20%** Antigen only



Employee Mental Health Wellbeing

- **73%** say employee mental health wellbeing has become a top priority
 - **24%** report significant increases in employee mental health concerns
 - **36%** report slight increases
- Interestingly, employers saw a dichotomy when looking at their employee's response to work over the pandemic. They report increases in engagement, productivity and morale (**58%**, **53%**, **48%** respectively) but also increases in burnout at **53%**



Pandemic Response and Planning

- **56%** have kept their COVID workplace safety precautions in place while **43%** have reduced or removed some forms of workplace safety precautions (masking, testing, remote working, etc.)
- **69%** had a disaster/emergency response plan pre-pandemic with **75%** currently having one in place today



Vaccination

93%

Require or encourage employees to be vaccinated

61%

Require all or some employees to be vaccinated

Vaccination is at the center of the fight against COVID-19. Our survey shows that employers in every industry now recognize this fact, and they are mandating or encouraging employees to be vaccinated. Employers reported an overwhelming support for vaccination with 93% reporting that they currently require or encourage employees to be vaccinated against COVID-19. Breaking that down further, 61% of respondents, in both the US and UK, require vaccination for all or some of their employees. Just over half of employers are offering some kind of incentive for employees to be vaccinated. The top three incentives were cash, additional time off and contributions to health savings accounts.



80%

Would allow vaccinations to be administered to employees at their facility

68%

Proof of vaccination from employees is encouraged

56%

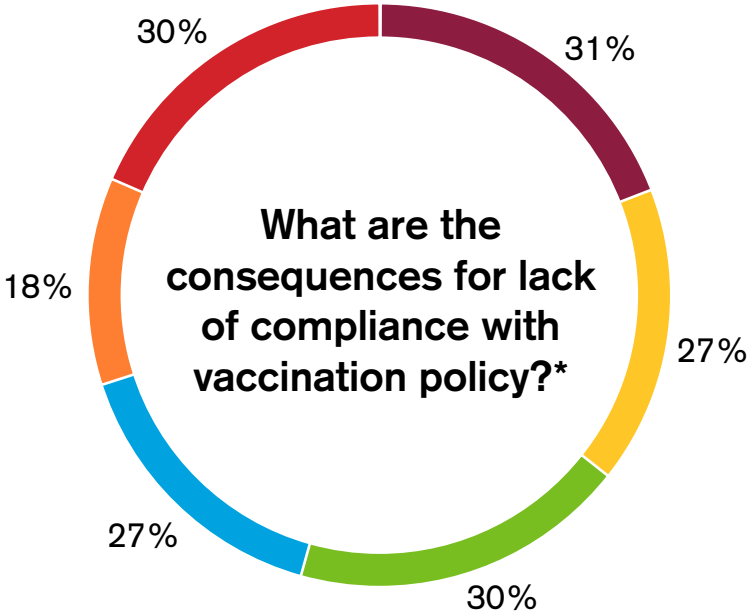
Proof of vaccination from employees is required

59%

Plan to change safety mitigation measures once broad vaccination is achieved

55%

Incentivized employees to be vaccinated



- Change of work responsibilities
- Require participation in mandatory testing
- Disciplinary action up to termination
- Require employee to wear a face mask
- No Consequences
- Not allowed to return to the physical work environment

* Multiple responses are allowed

Vaccination

Companies' policies for employees regarding COVID-19 vaccination

44%

Require all employees to be vaccinated against COVID-19

17%

Require some employees to be vaccinated against COVID-19

32%

Encourage but not require employees to be vaccinated against COVID-19

4%

We don't have a policy developed at this time

4%

We don't plan to encourage or require our employees to be vaccinated against COVID-19



Incentives offered to get vaccinated*

18%

Additional paid time off

16%

Cash

12%

Contribution to health spending accounts

9%

Can return to the physical workspace

9%

Free vaccine administration

9%

Regular testing not required

8%

Daily health screening not required

8%

Entered into a lottery or raffle for a prize

6%

Mask wearing not required

5%

Gifts (Gift cards, food vouchers, etc.)



* Multiple responses are allowed

Testing & Contact Tracing

Testing remains the most effective, yet the under-appreciated part of pandemic response. COVID-19 is unique, in that approximately 40% of people infected have no symptoms at all but can still transmit disease. Employers recognize this with 70% testing some or all of their employees. For those testing, 73% consider it mandatory testing. The vast majority of that testing is viral testing - most often weekly (46%) but as many as 27% of respondents are testing daily. Test technology varies with 41% using both PCR and Antigen testing, 39% PCR only and 20% antigen only.

These testing numbers show a small increase from 68% of employers who were testing in our last survey.

70%

Test their workers

46%

Perform environmental/surveillance testing

38%

Test only for viral infection

27%

Test for both



Reasons why companies choose not to test*

28%

Too costly

28%

Too complicated to implement

Main reasons companies do not test

19%

Concerned about test accuracy

17%

Worried about employee privacy

13%

Don't believe it will help reduce infections

13%

Worried about liability

13%

Time to obtain test results

12%

Time to obtain test results

9%

Test availability

9%

Lack of knowledge or information

* Multiple responses are allowed

This distribution represents 70% of companies that test their workers

Future testing plans

32%

Don't test and don't plan to test

30%

Uncertain



Viral Testing

1,107

(98%) Companies that test for viral infection

73%

Companies with mandatory testing

73%

Companies that test at least once a week

Does testing policy change for vaccinated employees?

47%

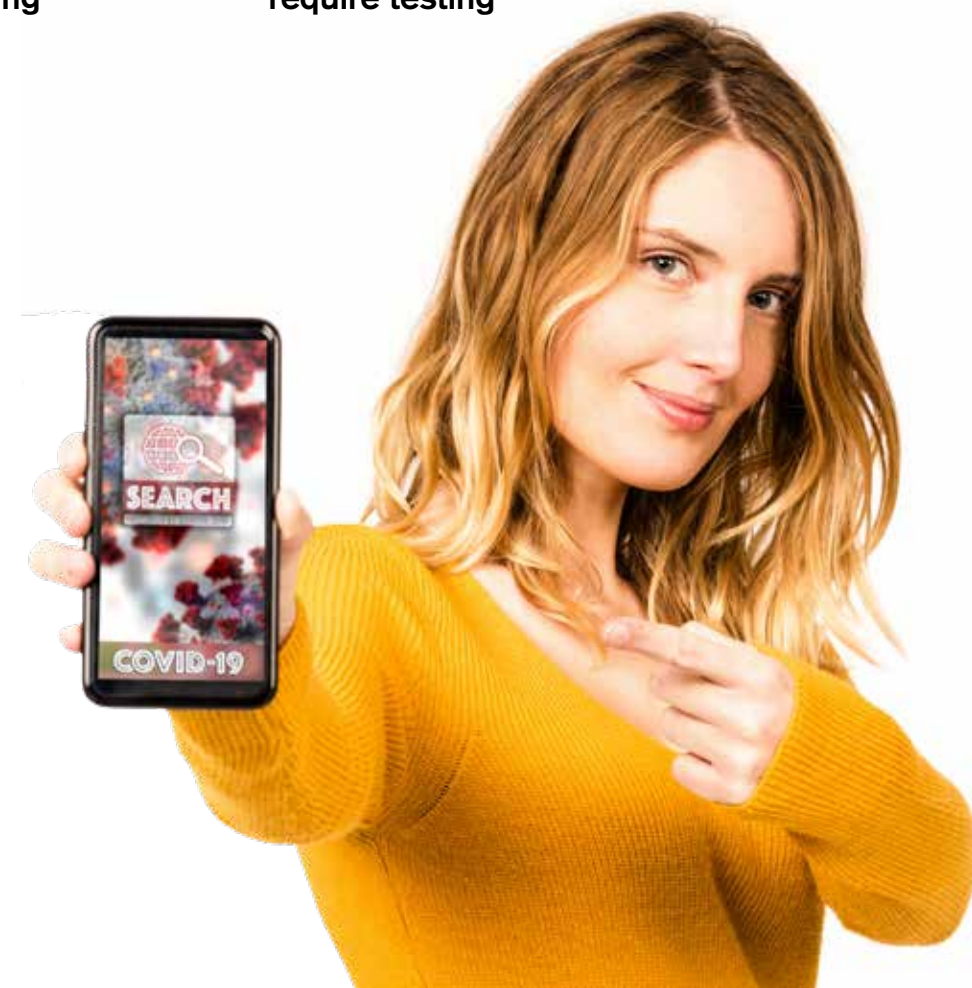
Less frequent testing

41%

No longer require testing

11%

No change



What was the most important factor in you choosing a test provider?

41%

Quality of tests

22%

Tests were available

18%

Test result turn around time

13%

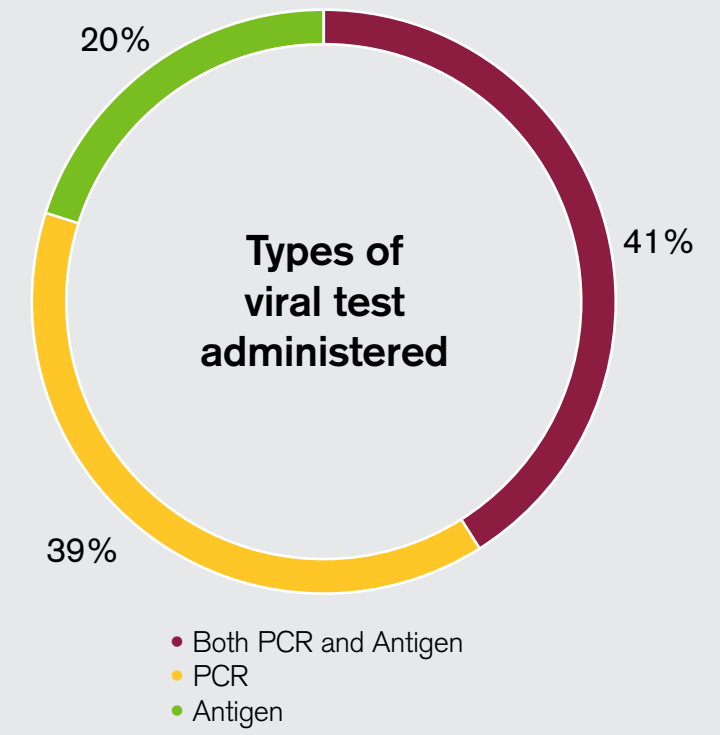
Government recommended

3%

Colleague recommended

2%

Price



Contact Tracing

57%

Companies that perform contact tracing

Are you tracing worker contacts outside of the workplace?

57%

Yes

36%

No

6%

Unsure

Viral / Antibody Testing

Viral Testing

1,107

(98%) Companies that test for viral infection

30%

% of workers that tested positive

Where are your workers being tested?*

38%

Health testing laboratory

36%

On site at our facility

27%

Local/regional hospital

23%

Retail pharmacy

12%

Academic or university site

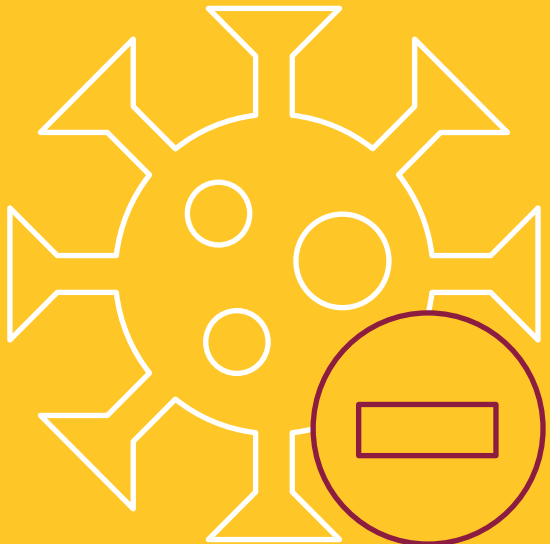
10%

At home - send to lab

6%

At home - immediate results

* Multiple responses are allowed



Antibody Testing

823

(73%) Companies that test for antibodies

36%

% of workers that tested positive

Where are your workers being tested?*

43%

Health testing laboratory

35%

Local/regional hospital

26%

Retail pharmacy

25%

On site at our facility

15%

Academic or university site

7%

At home



Employee Wellbeing

For employers, the pandemic's toll on employee mental health and wellbeing is top of mind. The results from our survey show that employers are acting to intervene to try to reduce the burden on their employees while hoping to sustain or increase productivity, morale and engagement.

Interestingly, employers report increases across the board for both positive indicators of employee wellbeing (engagement, productivity and morale) and negative indicators of employee wellbeing (burnout and mental health concerns). This dissonance has appeared in both this and the previous March 2021 survey.

Employers' concern about their employees' mental health is clear with 73% indicating that it is a top priority for their organization. Consistent with that, employers reported an uptick in the use of available company mental health resources by 38% since the start of the pandemic.

Where do we go from here? As the pandemic drags on, with each passing month, employers will need to focus even more attention on employee wellbeing and find creative and innovative solutions to ensure their workforce's physical, emotional and mental health stays strong.

Employers that indicated employee mental health wellbeing has become a top priority for their company

73%



60%

Increased mental health concerns

58%

Increased engagement

53%

Increased productivity

53%

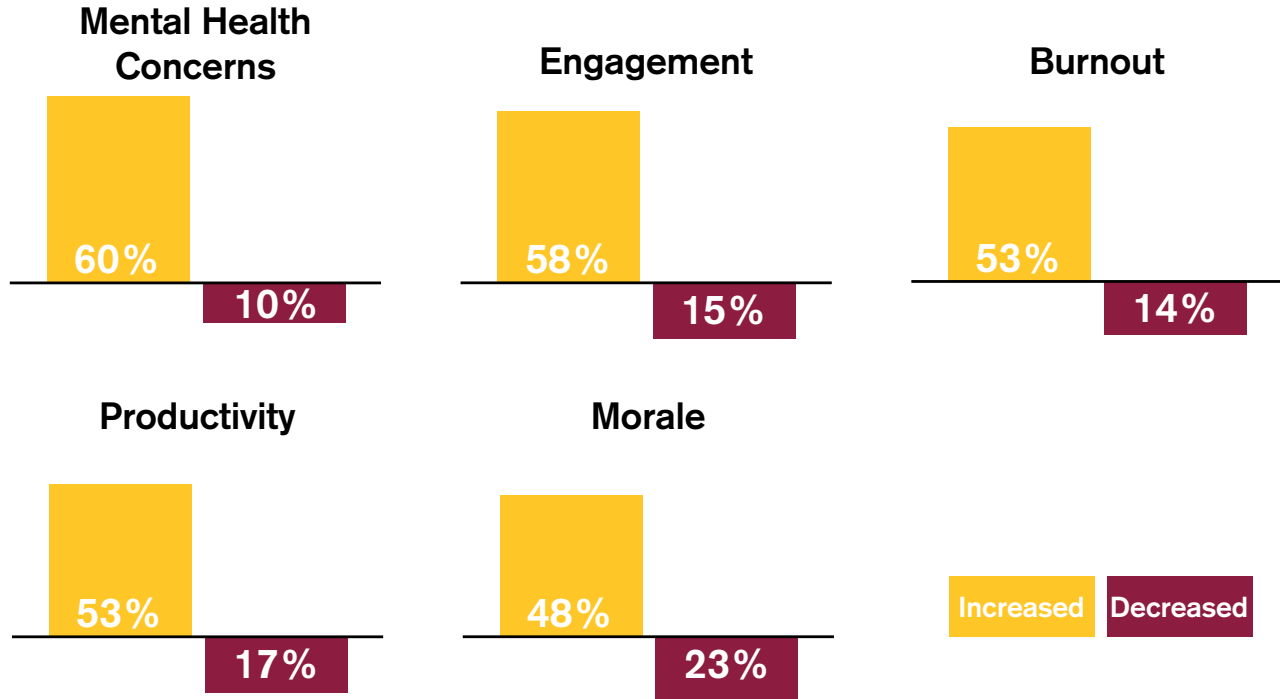
Increased burnout

48%

Increased morale

38%

Employers that reported an increase in the use of available company resources related to mental health since the pandemic began



Future of Work Overview

The way we work has forever changed. Prior to the pandemic, most adults spent more of their waking hours at their workplace than at their homes. The pandemic, however, demonstrated that this new model, Work from Home, was possible and productive. And, it was not just traditional office jobs that were moving to the “virtual” work environment. The availability of sophisticated video conferencing systems along with the relatively low cost of personal computers allowed educators to engineers to event planners to even exercise consultants to never leave their living room and work all day.

As many are now moving into hybrid mode, employers are grappling with workplace policies (e.g., masking, testing, vaccination, or remote work options) to keep their workforce safe and well. 42% of employers reported having an employee resign due to nonexistent COVID-19 workplace policies with an additional 17% reporting an employee resignation due to COVID-19 safety policies not being stringent enough.

While the initial shift to Work from Home happened shockingly quickly, employers are now, 18 months later, reassessing and reimagining the future of work. Most don't want to simply go back to the way things were - but leverage and keep the best practices and innovations developed out of necessity during the pandemic.

How will they do this? Our survey shows that a majority of employers intend to allow employees to work from home through the end of 2021 and plan to offer more flexibility by expanding Work from Home policies even after the pandemic ends.

66%

Intend to offer flexible or expanded work from home policies post-pandemic

63%

Believe employees should be in the office at least 20 hours a week

61%

Intend to allow employees to work from home full-time through 2021



Main challenge in returning employees to physical work environment

22%

Employees not wanting to return to in-person work

17%

Safety of employees is difficult to achieve

14%

Expense of COVID testing

13%

Lack of available COVID testing

11%

Lack of available COVID vaccines

7%

Cost of making workspace safe for employees

7%

Lack of available childcare for employees due to obstacles like school closures

6%

Lack of work due to loss in revenue or clients

3%

Other employers offering work-at-home options



Future of Work Overview



Reasons why companies think employees should be in the office at least 20 hours a week



Challenges

Employee Response to COVID Workplace Policies

55%

Employers who stated employees *haven't resigned* due to COVID workplace policies

39%

Employers who stated employees *have resigned* due to COVID-19 workplace policies

Resignation due to COVID workplace policies (masking, testing, vaccination, remote work)*

42%

Lack of policy

39%

Policy not restrictive enough

17%

Overly restrictive policy

* Multiple responses are allowed



COVID Workplace Policies and Employee Termination

60%

Haven't had an employee terminated

35%

Have had to terminate at least one employee

COVID-19 workplace policies that resulted in employees being terminated*

36%

Masking

23%

Testing policy

23%

Remote working policy

18%

Vaccination policy

* Multiple responses are allowed



Challenges

What are the top concerns employers have?

12%

COVID-19 variant (Delta or other) continues to infect many more people

12%

COVID-19 death rate increases substantially

12%

COVID-19 rebounding in the US

11%

COVID-19 vaccines lose effectiveness

10%

COVID-19 variant not able to be detected by current tests

9%

COVID-19 rebounding outside of the US

5%

Labor shortage

4%

Retaining current employees / workforce attrition

4%

Inflation

4%

Evolving work environment landscape

4%

Liability related to COVID-19 workplace policies

4%

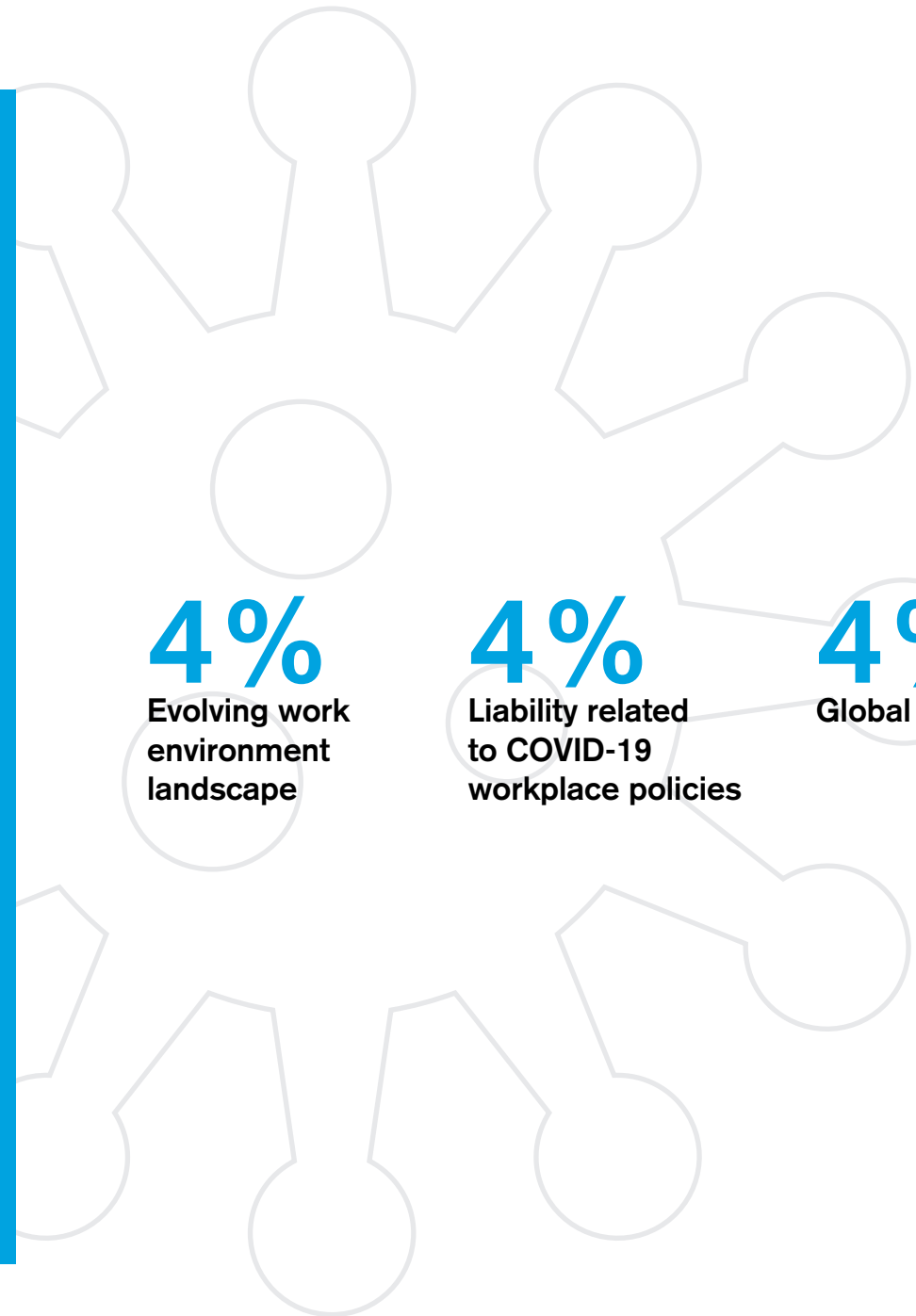
Global unrest

3%

Lack of childcare for employees with children

3%

Supply chain



Employee attitude towards returning post-pandemic (+/-)

83%

Positive attitude towards returning post-pandemic

11%

Negative attitude towards returning

62%

Highest % of remote employees during pandemic

48%

Current % of remote employees

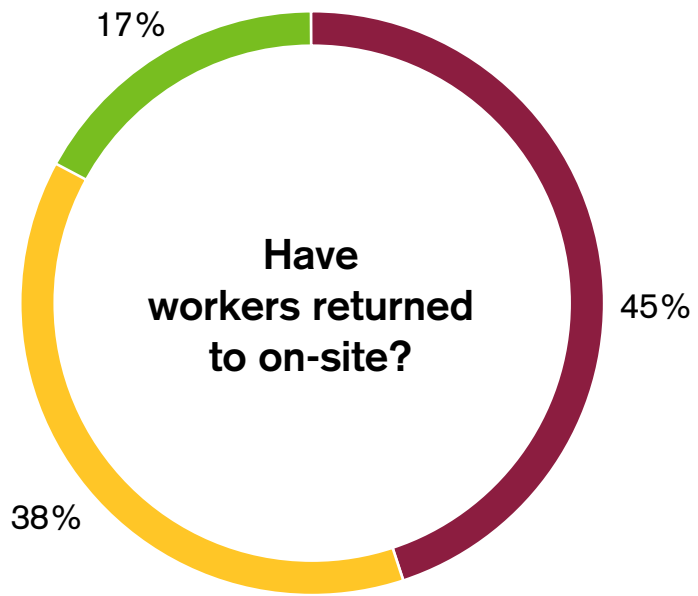
48%

Average % of workers returned

43%

Reduced COVID-19 workplace safety precautions

Primary concern about coming back
Personal health / High risk for infection



- Yes - Partial return of workers
- Yes - All workers returned
- No

What is the overall workforce's opinion about returning back to the workplace?

32%

They wanted to return earlier than possible

28%

They want to return immediately

23%

They want to return eventually but not yet

11%

They are reluctant to return

4%

They do not want to return



Coming Back and Remote Work

What milestones need to occur in order for you to return workforce to work onsite?*

42%

When all of our workforce is vaccinated

37%

Decreasing cases in the community

35%

When a majority of our workforce is vaccinated

24%

When government or health agency allows

18%

When we have testing protocols in place

16%

When we have planned safety measures in place

13%

Predetermined time



* Multiple responses are allowed

If you reduced COVID-19 workplace precautions, what would cause it to get reinstated?*

38%

New variants emerging (Delta or other)

35%

Increase in employees positive test cases

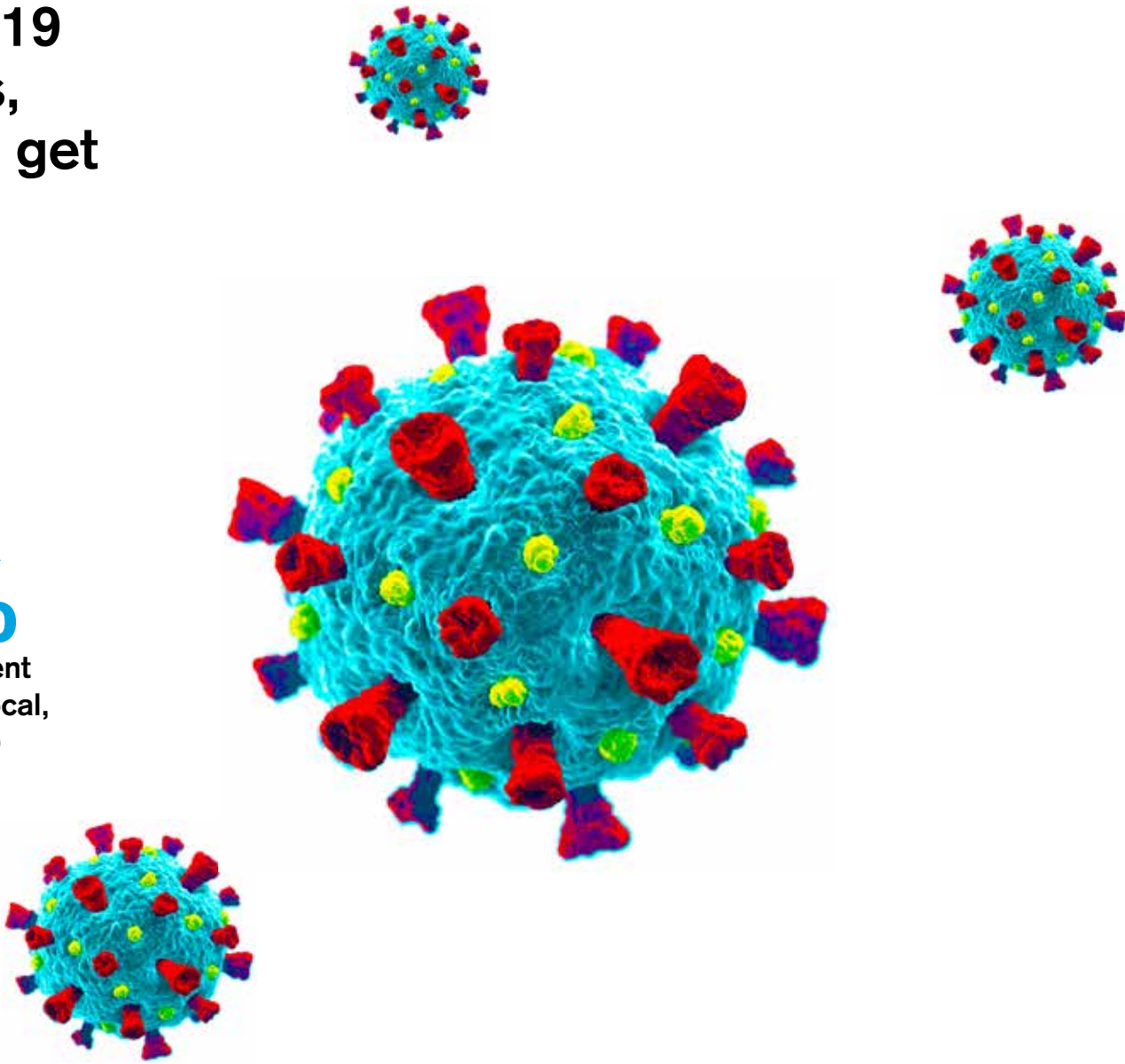
24%

New government ordinances (Local, state, national)

3%

No plans on reinstating of safety precautions

* Multiple responses are allowed



Coming Back and Remote Work

What are worker's concerns about returning?*

56%

Personal health / Higher risk for infection

53%

Safety at facility

32%

Childcare

28%

Transportation to facility

10%

They do not have concerns about returning

* Multiple responses are allowed



When do you expect your workforce to come back to work onsite?

43%

The next three months

23%

The next six months

14%

The next month

11%

Not sure

9%

Longer than six months



Pandemic Response & Preparedness

Being prepared for the unlikely and unexpected is the essence of an emergency response plan. Overall, 75% of employers reported having an emergency response plan in the survey which is only 6% more than those who reported having a pre-pandemic emergency response plan. Given the obvious, we expected that this number would be close to 100%. There was a significant difference between the US and UK on this issue - with 79% of US respondents and 64% of UK respondents reporting that they currently have an emergency response plan. The most significant change from pre- to post-pandemic emergency response planning happened in the epidemic/pandemic category which increased from 52% pre-pandemic to 70% as of August 2021.

1,490 (92%)

Companies that made permanent adjustments

Allow employees to work from home
Top permanent action taken due to financial pressures



What actions have you taken?* (Permanent / Temporary)

| | | | |
|---|---|--|---|
| 42% / 31% Allow employees to work from home | 36% / 29% Reduction in workforce | 35% / 13% Changes in employee health benefits | 28% / 30% Hiring freeze |
| 26% / 22% Reduced hours for hourly workers | 24% / 18% Reduced physical office space | 21% / 20% Executive / management pay cuts | 19% / 17% Closure |
| 17% / 20% Furloughs | 17% / 12% Bonuses or other incentives | 16% / 11% Increased salary for hourly workers | 15% / 16% Rescinding job offers |
| 15% / 11% Increased hiring | 11% / 9% Reduced pay for non-management workers | 10% / 7% Increased salary for non-management workers | |

* Multiple responses are allowed

Pandemic Response & Preparedness

Emergency plan

69% vs. **75%**
2019 2021

55%
 Very useful



Have these plans been useful for responding to the COVID-19 pandemic?


55%
 Very useful


26%
 Mostly useful


14%
 Somewhat useful


5%
 Not at all useful


What type of emergency plans did those companies have?* (2019 / 2021)


52%/70%
 Epidemic / pandemic


53%/56%
 Fire


53%/52%
 Natural disaster


43%/47%
 Loss of power


44%/43%
 Active shooter


29%/30%
 Civil unrest

* Multiple responses are allowed

Financial impact

The financial impact of the pandemic varied widely by industry but there were several commonalities. Over half of employers (52%) reported an increase of more than 25% in operating costs due to the pandemic. Industries that work with consumers including Consumer Retail, Consumer Transportation, and Healthcare Services (e.g. doctor's offices) reported experiencing higher increases in operating costs compared to other industry sectors. The most common cost categories were masks and hand sanitizer followed by cleaning supplies and gloves. For UK employers - facility upgrades (other than ventilation) often appeared in the top three.

52%

Over 25% increase in operating costs (excluding testing) due to the pandemic

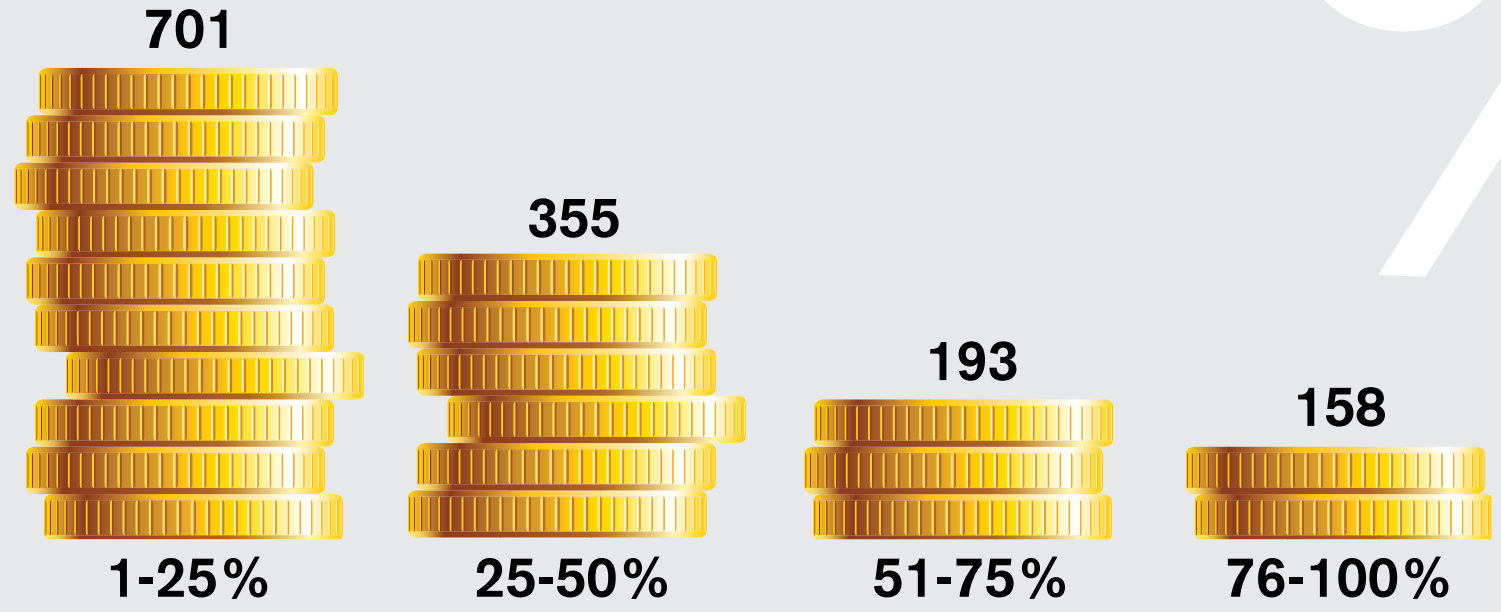
Not including testing, what one-time costs have you incurred?*



* Multiple responses are allowed



Compared to a year ago, what % increase in your monthly operating costs will be COVID-19 related – excluding testing?



ASU COVID Commons Initiatives



<https://ASUcovidcommons.com>



<https://testingcommons.com>



<https://ASUworkplacecommons.com>



<https://chs.asu.edu/diagnostics-commons/evidence-commons>



<https://chs.asu.edu/diagnostics-commons/blog>



<https://ConnectToTest.com>



<https://chs.asu.edu/diagnostics-commons/webinars>



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