



HOME UNBOUND:

TRANSITIONING BACK
TO THE OFFICE
AFTER COVID



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Spurred by their employers' requirements, desire for daily human interaction, and the need to reconnect with clients and stakeholders, more than half of Americans (53%) expect to return to the workplace full time within the next six months. Businesses planning to welcome their employees back to the workplace should be preparing now to address staff concerns to maximize the likelihood of a safe and productive resumption.

Key Takeaways:

53% of workers expect to be back to the workplace full time within six months

- Southerners are most ready to return; workers in the southwest are most reluctant
- The c-suite is most likely to continue working at home; middle-management managers are least likely

59% of workers have health-safety concerns about returning

- Professional and creative services are the industries with the highest levels of concern
- Services, social work, and industrial industries have the lowest levels of concern

The biggest concerns about returning to work are:

- Office hygiene and protective measures
- Proximity to other workers
- Exposure during commuting
- Effectiveness of contact tracing

Among protective measures that would make staff feel more comfortable, the most desired are:

- Temperature taking/scanning (ranking first or second for all groups)
- Limiting the number of people on site (ranking first for staff level)
- Touchless door entry
- Mask detection
- Digital proof of vaccination (ranking first for C-level)

59%

of survey respondents express concern about returning to an office

The most common currently used safety measures for organizations with on site staff are:

- Providing masks, sanitizer, other protective gear
- Increasing cleaning protocols
- Enforcing physical distancing
- Temperature checks
- Limiting the number of people on site
- Contact tracing
- Screening health questions prior to access

The main reasons for returning to the workplace are to:

- Resume human interaction
- Maintain relationships with clients and stakeholders
- Better collaborate with colleagues
- Reestablish a sense of routine
- Access a better office/workstation setup
- Regain face time with boss/mentors
- Vaccinations are making workers more amenable to returning to the workplace

While 59% of survey respondents express concern about returning to an office or other workplace, the vast majority of employees who have remained on site have been satisfied with the practices, protocols, and technologies that their organizations have implemented to protect them against COVID.

WHAT RETURNING WORKERS EXPECT

Workers who haven't yet gone back to the workplace were asked which solutions would give them the most confidence in returning. Favored measures vary widely by job, environment, and industry, but generally temperature scanning ranked highest followed by limiting the number of people on site, touchless door entry, mask detection, touch-free sign-in and out and social distancing monitors.



Kari, a math teacher at a junior high school in downtown Los Angeles, has been working remotely for months. She is intrigued by hands-free access: **“Students going in and out, that’s a lot of people touching doors,”** she says. Touchless door entry would bring peace of mind and could save on sanitizing costs, she suggests.

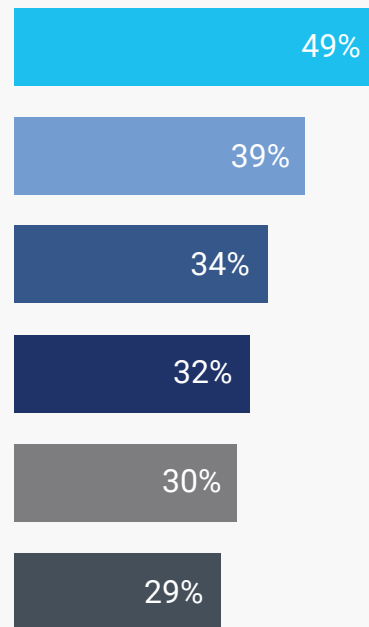


Steve is a lobbyist for a pharmaceutical company in Washington, D.C. He prefers touch-free sign-in and out for contact tracing, digital proof of vaccination, and social distancing monitors—either human or technological. **“Those three are sufficient to open safely without causing a backlog at government buildings,”** he says.



Tommy, a Colorado advertising firm’s recruitment manager, favors measures that provide quantitative results. **“Temperature screening is concrete and tangible, not just taking someone’s word,”** he says. He would also like to see his employer adopt no-touch access.

PREFERRED SAFETY MEASURES



- Temperature scanning
- Limited number of people on site
- Touchless door entry
- Mask detection
- Touch-free sign-in and out for contact tracing
- Social distancing monitors

WHAT'S WORKED FOR STAFF WHO ARE ALREADY BACK

Workers who never left their work sites, or returned within a few months, were asked how well their employers have dealt with COVID safety concerns. The vast majority have been very pleased. Only 8% of respondents already back on site have been dissatisfied with their organization's precautions, and only 10% say they were unaware of new safety protocols or inadequately trained on them.

The most common protective measures include providing masks, hand sanitizer, or other gear (73%); increasing cleaning protocols (59%); enforcing physical distancing (55%); and requiring temperature checks or thermal scanning for on-site access (48%).

At the aerospace company in Denver, where he is a chief engineer, Jason says that his employer has excelled with its precautions—extra cleaning, protective gear, temperature checks, and more. So much so that most staff have been back in the office for months. “We have the advantage of a big building compared to the size of our workforce,” he says, “so we have enough space where anyone who wants to come in can do so. I can't think of a single time I've felt uncomfortable since I've been back, and we haven't had any incidents. That tells a story that our measures are working.”

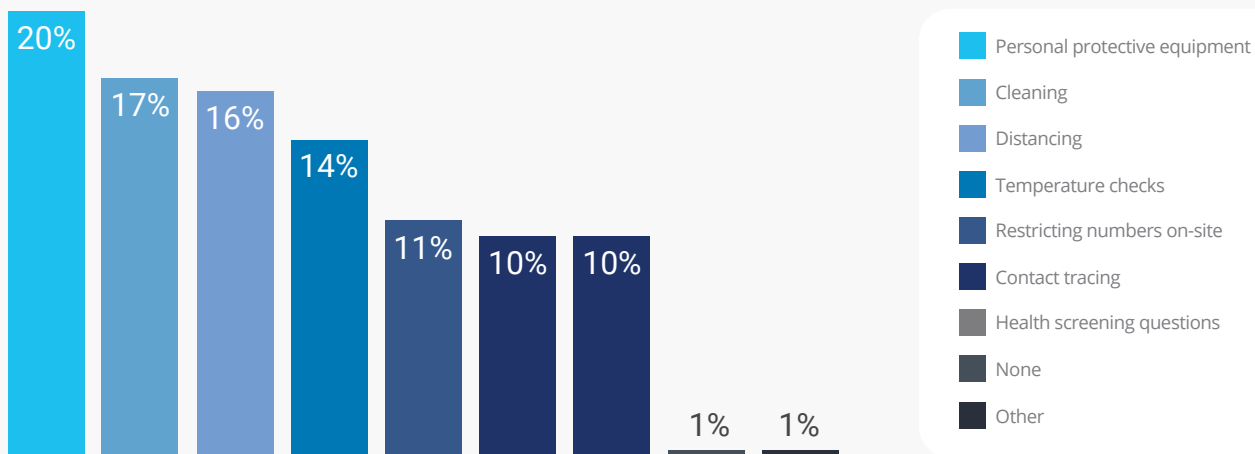
8%

Dissatisfaction of respondents with their organization's precautions

10%

Respondents unaware of new safety protocols or training

WHAT MEASURES IS YOUR ORGANIZATION TAKING TO KEEP YOU SAFE?

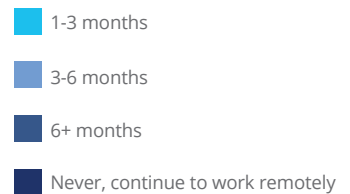
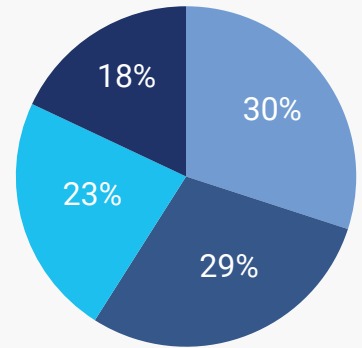


WHEN WILL WORKERS RETURN FULL TIME?

Asked when they expected to return to the workplace full time—from 1 to 3 months, 3 to 6 months, more than 6 months, or never—respondents split fairly evenly. A small plurality (30%) expects to return in 3 to 6 months. Almost 29% expect to return sometime after 6 months. Almost a quarter, 23% see a 1 to 3 month return plan in their near future. And 18% predict they will never return to the office full time.

Some see the pandemic as ushering in a sea change in workplace expectations that will be hard to reverse. Creative services personnel are the least likely to return, with 38% predicting working at home forever. One west coast-based executive in the creative field says that the cost savings in reduced travel and a smaller office footprint—as well as a track record of certain people performing better at home—have changed the workplace paradigm. “I’d like to come to the office occasionally and visit clients and attend important conferences,” he explains, but companies can gain huge efficiencies with many staff members working from home.

WHEN DO YOU SEE YOURSELF RETURNING TO THE WORKPLACE FULL TIME?



Others crave the routine and community offered by the workplace. **“When our office opens in September,”** says Lucy, the twenty-something program coordinator at a tech startup in New York City, **“I’ll be the first person in the door.”** Living alone in a small studio apartment, she says she craves human interaction.

LEVELS OF CONCERN

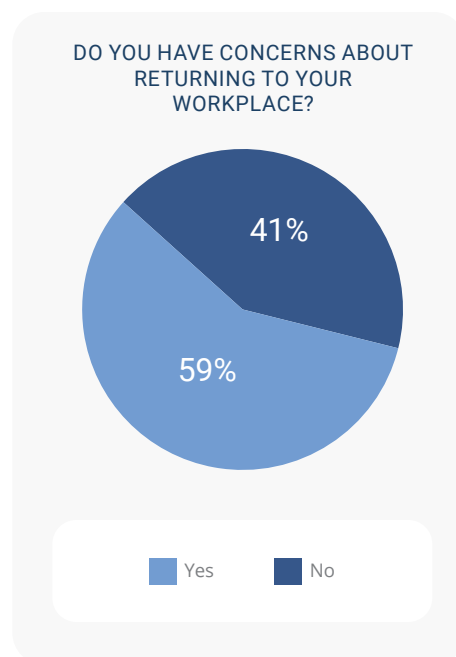
Almost 60% of workers balk at returning to the workplace full time, with the highest levels of anxiety emerging from personnel in professional services (72%) and creative services (62%). At the other end of the spectrum, only one-third of service industry personnel cite misgivings about returning, followed by workers in the social service and industrial sectors, at 53% apiece. Those latter numbers likely reflect the lack of alternatives to working on site.

Geographically, the southeast is most ready to come back on site (53%), while 73% of people in the southwest states prefer the comforts of home. The southwest is where employees most often still work at home.

But the mass vaccination rollout underway has already been dissipating long-held trepidation. Steve, the pharmaceutical lobbyist in Washington, D.C., received his first Pfizer vaccination on the day he participated in this survey. "Being vaccinated pretty much alleviates any concerns," he says.

Tommy, the recruitment manager, hasn't crossed the vaccine threshold yet. "My aunt lives with me and is at high risk, with congestive heart failure," he says. "My biggest concern is contracting it and bringing it back to her. Once she's fully vaccinated, I'll feel a little better about it, and once I get a vaccine, even more so."

For Michelle, a medical sales representative, her work requires her to visit the offices of plastic surgeons, dermatologists, and other medical professionals. Her comfort level is directly proportional to her familiarity with the practices and procedures of the offices she visits. "At first, some offices preferred remote," she says, and she took their advice. Others she avoided because she "didn't know whether they were on top of cleanliness." She found that the better offices tended to take body temperatures of everyone who entered: staff, patients, reps, and visitors alike.



WHY RETURN TO THE OFFICE?

Respondents cite a wide variety of reasons to return. The most mentioned was a desire to resume daily interaction (50%) and second most was to maintain relationships with clients and stakeholders at 39%. Other reasons for returning to the office cited were better collaboration (37%), get back to a routine (36%) and better access to workstation setup (31%). Last but not least at 28% was getting more face time with the boss.

The need for interaction resonates with Kari, the Los Angeles math teacher. “We Zoom all day, every day. I’ve never seen so many mental health issues before in the school,” she laments. “Students are falling apart,” she adds, especially ones difficult home situations.

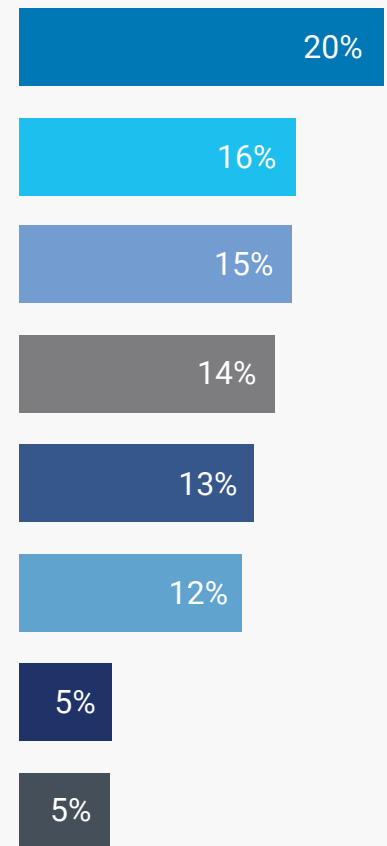
Marta, an Indiana-based senior manager for a large software company, feels acutely isolated. “I’ve worked remotely before, but I underestimated how detached I would feel from the people I’ve been working with,” she says. She used the opportunity to change employers, but that didn’t help. “Onboarding was hard. I miss working with people, the camaraderie of going out for cocktails after a conference or visiting clients,” she says.

Daniel, a commercial construction subcontractor, specializing in demolition and drywall, sees staff cohesion eroding and new hires falling behind due to lack of face-to-face contact. “What hurt the most was not being all together and having the camaraderie,” he reports. “And the people who had just started have not been able to learn or progress as quickly.”

Others miss work setups that they can’t replicate at home—as well as an outlet away from the chaos of household life. In the early days of the pandemic, Jason, the aerospace engineer, worked at home, also occupied by his spouse, two children, and pets. He missed both the peace and superior technology of the office. He spent his day managing the distractions of home, without an office or desk space or large high-resolution monitor that would better enable him to review technical documents, software.

The pandemic has also deprived staff of critical relationship-building opportunities. Lucy, the program coordinator at a tech startup in New York City, feels she is missing out by working at home. She wants to soak in the wisdom, experience, and guidance of mentors and peers. Before, “I could just turn my chair around and ask a question,” Lucy says. “Now I have to find someone on Slack.”

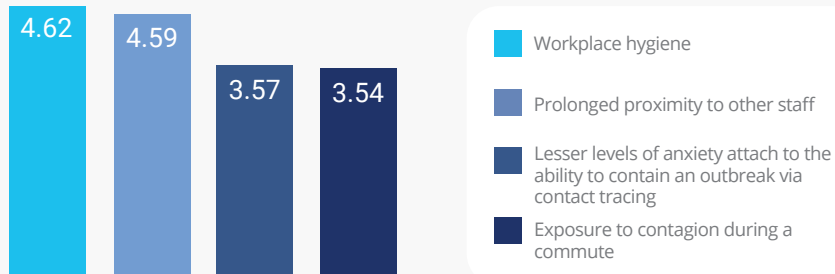
WHEN YOU THINK ABOUT RETURNING TO THE WORKPLACE, WHICH FACTORS ARE MOST IMPORTANT TO YOU?



- Daily human interaction with others
- The need to maintain working relationships with clients/stakeholders
- Better collaboration with colleagues
- To establish a sense of routine
- Better work station setup, e.g. desk, tech, space etc
- More face-to-face contact with boss/mentors
- Workplace amenities, e.g. cafes, gyms, etc
- None of the above

SPECIFIC CONCERNS

SO WHAT ACCOUNTS FOR THE CONTINUED UNEASE ABOUT RETURNING TO PRE-PANDEMIC WORK HABITS?



On a scale of 1-6, with 6 being the most concerned and 1 the least, respondents were asked to rate their level of unease

SERVICE WORKERS FEEL THE MOST APPREHENSION ABOUT OFFICE HYGIENE



Worker proximity registers as a major worry for all sectors except creative services. For example, Tommy, the Colorado recruitment manager, plans to switch jobs soon. He dreads sharing an office with someone who isn't as concerned about COVID, doesn't take rigorous safety measures, or plans not to vaccinate.

Adam, a legal and risk consulting executive, fears offending or failing to connect with clients if he's wearing a mask and they're not. "I've been in meetings where everyone has been vaccinated but me, and I'm the only one masked up," he says. "Between the mask making it difficult for people to hear me and distancing myself at the end of the conference room, it's difficult being an engaged partner." He'd rather conduct most meetings virtually for the foreseeable future.

A NEW PARADIGM?

For every two workers itching to return to a pre-2020 on site work routine (24%), another three prefer to remain working at home (40%) or adopt a hybrid home-office approach (35%). New Yorkers and Pennsylvanians are ready to extend the pandemic-imposed work environment, while Californians are more eager to resume their former commutes.

CEOs and other chief officers envision the longest return timelines—one-third doubt they will ever return at all, and fewer than 7% say they will be back in 1 to 3 months. Adam, the legal and risk consultant, predicts that one-third of workers will eagerly return to the office, one-third will stay at home, and a final third will take a hybrid approach. “There are just too many benefits to simply go back to the way things were,” he says, “especially since companies and their staff got a long trial of how they operate remotely.”

WHO'S STILL GOING IN?

In some industries, the pandemic hasn't significantly altered the working day. As of March 2021, with only about 15% of Americans having been vaccinated, 48% of respondents still work on site full time. Workers in the service industry put in the most full-time duty on site (58%), with industrial workers (57%) a close second. Professional services and creative services personnel pick up the rear.

Geography also plays a role; 89% of southerners go on site at least once per week, while people in the southwest are most likely to work exclusively at home.

Some industries can't operate effectively at home—manufacturing, shipping and transportation, and construction, to name a few. Much of the healthcare industry hasn't had the luxury of retreating to work at home. Kensley has worked as a nurse in a Virginia hospital since May 2020, having moved north from another state. Though she's satisfied with her employer's protective measures, oft-changing protocols have been confusing. “When I started, it was temperature checks and masks,” she recalls. “Then they required face shields and goggles. Then specific types of goggles, then specific types of masks.” And she isn't sure whether this evolution was driven by science, expert recommendations, or whim. Still, only two people in her department of 30 got COVID, which she credits to her employer's safety precautions.

OVERALL, WHAT IS YOUR PREFERRED WORKING ENVIRONMENT?

40%

35%

24%

1%

- Prefer working from home
- Prefer working on-site
- Prefer a balance of the two
- Unsure

- The southwest is the happiest to continue working from home with 86% stating they'd prefer to work at least some of the time from home.
- The west prefers working on-site - 34% state this is their preference.

LEVEL OF PRODUCTIVITY

Respondents split fairly evenly when asked whether they feel more or less productive working from home compared to the office. 34% feel more productive, 29% feel less productive, 33% find no difference, and the rest aren't sure.

HOW DO WE WELCOME WORKERS BACK SAFELY?



The right technology can help enforce new health-safety protocols and ensure compliance.

Some cloud-based access control solutions offer **Facility Safety Features** including occupancy tracking, contact reporting, mobile self-screening, and visitor management and reporting. These capabilities are essential to bringing employees back confidently and ensuring their health, safety, security and peace of mind.

Brivo provides mobile access control, which enables employees to enter facilities using their mobile phones to unlock doors, in a more hygienic way.

Learn more at www.brivo.com



WhosOnLocation gives you the reassurance and controls to make a safe return to the workplace. Features include:

- **QR code posters** are a quick, easy, and cost-effective way to deploy WhosOnLocation. Print QR code posters and place at entries and exits for quick and easy sign in/out from a guest's smartphone. Health screening and contact tracing included.
- **Touchless kiosk** mode for a hygienic sign-in option. Visitors, contractors and employees can simply scan the QR code displayed on the kiosk to complete the sign in process on their smartphone.
- **Screen who comes on-site** from those recently returned from overseas? Or experienced flu-like symptoms? You can customize your sign-in questions to identify those who pose a risk.
- **Get notified** if someone signs in outside of your policy, and set up rules to deny access to those who don't meet your conditions of entry.
- In the unfortunate instance that an infected person comes on-site, easily trace and notify those who could be potentially exposed.

Learn more at whosonlocation.com

SURVEY METHODOLOGY

This survey was conducted by a partnership between Brivo and Who's On Location. The survey was conducted via email in March 2021, using an audience of Survey Monkey users as respondents. Five hundred thirty-eight people took the survey. Responses came from all U.S. states except Vermont and Wyoming, with the highest numbers coming from California, Florida, New York, and Texas. Twenty-five industries were represented (sorted into categories; see box below), with the highest percentages from healthcare, IT/computing, retail, and education. A plurality of respondents occupied the staff level (44.2%), followed by manager (26%), administrator/associate (16%), director (6%), C-suite (6%), and vice president (1.38%). Slightly more males than females (52% to 49%) participated. Age brackets broke down as follows: 45-60: 33%; 30-44: 31% 18-29: 22%; 60 and older: 14%. Follow-up interviews provided extra detail and context.

EXPLAINING THE INDUSTRY BREAKDOWN



Creative services

Charity and voluntary work, creative arts or design, marketing, advertising, PR, media and digital



Professional services

Business consultancy or management, accountancy, banking, finance, computing or IT, law, recruitment or HR, sales



Industrials

Energy and utilities, engineering or manufacturing, environment or agriculture, property or construction, science or pharmaceuticals, transport or logistics



Social services

Healthcare, teacher training or education, social care, public services or admin, law enforcement and security



Service industry

Hospitality, leisure, sport or tourism, and retail

About Brivo

Brivo is the global leader in mobile, cloud-based access control for commercial real estate, multifamily residential, and large distributed enterprises. Our comprehensive product ecosystem and open API provide businesses with powerful digital tools to increase security automation, elevate employee and tenant experience, and improve the safety of all people and assets in the built environment. Having created the category over twenty years ago, our building access platform is now the digital foundation for the largest collection of customer facilities in the world, trusted by more than 25 million users occupying over 300M square feet of secured space in 42 countries.

Our dedication to simply better security means providing the best technology and support to property owners, managers, and tenants as they look for more from buildings where they live, work, and play. Our comprehensive product suite includes access control, smart readers, touchless mobile credentials, visitor management, occupancy monitoring, health and safety features, and integrated video surveillance, smart locks, and intercoms. Valued for its simple installation, high-reliability backbone, and rich API partner network, Brivo also has the longest track record of cybersecurity audits and privacy protections in the industry.

About WhosOnLocation

WhosOnLocation provides people presence management software that monitors the safe and secure movement of people through buildings and work sites. Our powerful, cloud-based solution unites visitor, contractor, employee, and emergency management, enabling organizations to secure their facilities and ensure the safety of every person on-site.

Armed with a rich, unified source of people presence information, our users are empowered to make more strategic, data-driven decisions that mitigate risk, reduce overhead costs, and streamline operations.



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