

SWAA March 2023 Updates

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6 March 2023



Latest survey wave included: February 2023

To sign up for regular results updates, please sign up [here](#).

- **Source of all data (unless noted):** Survey of Working Arrangements and Attitudes (SWAA), see www.wfhresearch.com

- **When referring to these results please cite:**

Barrero, Jose Maria, Nicholas Bloom, and Steven J. Davis, 2021. “Why working from home will stick,” National Bureau of Economic Research Working Paper 28731.

www.wfhresearch.com

The Survey of Working Arrangements and Attitudes



- Monthly online survey since May 2020, >100,000 observations to date.
- We design the survey instrument.
- Target population: U.S. residents, 20-64, who earned \geq \$10K in 2019 (\geq \$20K in early survey waves). From January to March 2022, we transitioned to earned \geq \$10K in the prior year.
- The SWAA is fielded by market research firms that rely on wholesale aggregators (e.g., [Lucid](#)) for lists of potential survey participants.
- After dropping “speeders” (~16% of sample), we re-weight to match 2010-2019 CPS worker shares in age-sex-education-earnings cells. Dropping those who fail attention checks (roughly another 12%) sharpens some results.
- Median response time: 7 to 12 minutes, after dropping speeders
- Results, micro data, survey instruments, and more are freely available at www.WFHresearch.com.

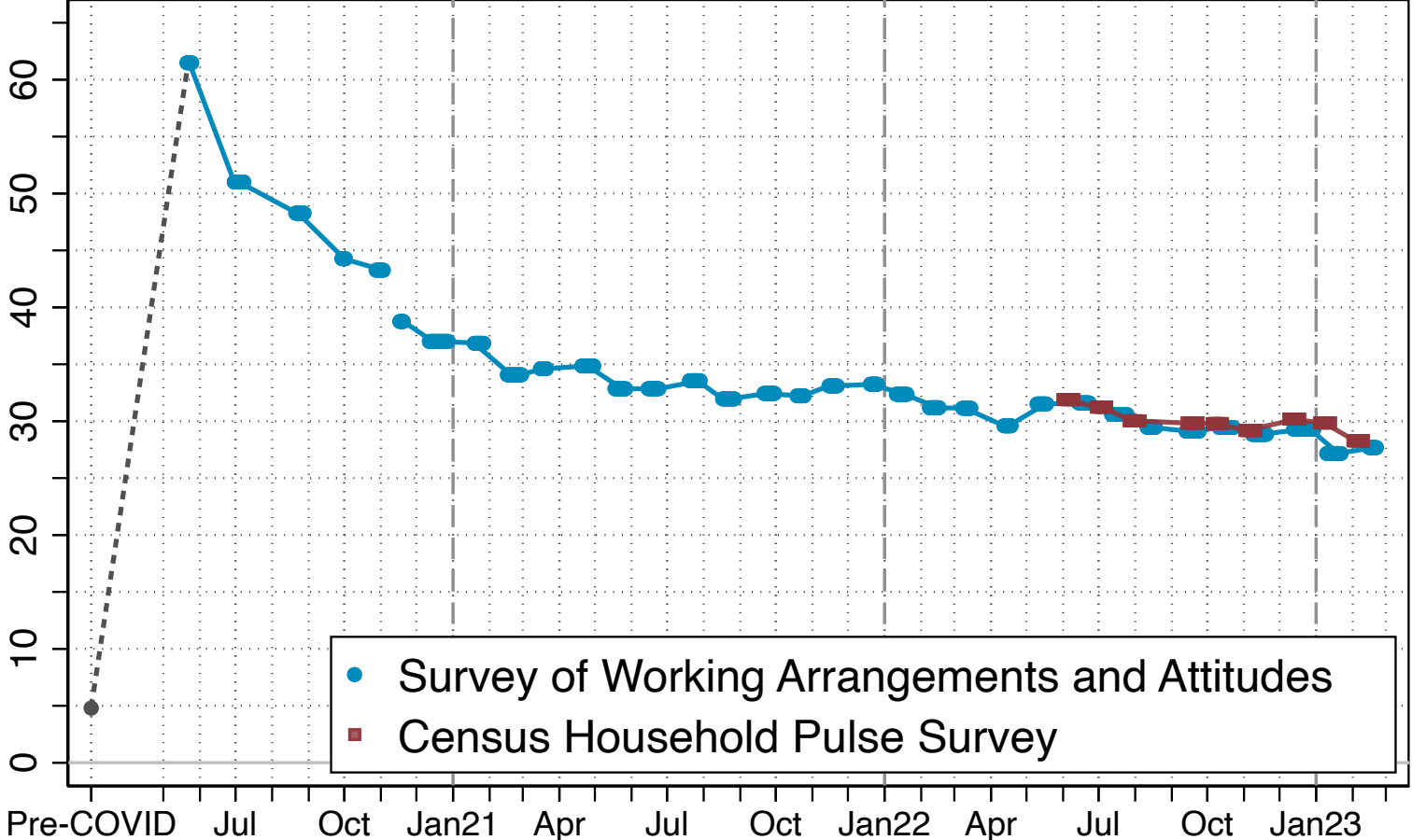
Representativeness

- By design, we focus on persons who exhibit some attachment to the workforce, as evidenced by prior earnings.
- No respondents are recruited based on an interest in our topics.
- Since respondents take the survey using a computer, smartphone, iPad or like device, we miss people who never use such devices.
- Before re-weighting, the SWAA under samples the less educated, particularly those who did not finish high school.
- Even after re-weighting, we may over sample those who are more tech and internet savvy, especially among the least educated.

Days Worked from Home Are At 27% In Early 2023



Percentage of paid full days worked from home



*Pre-COVID estimate taken from the 2017-2018 American Time Use Survey
 *The break in the series in November 2020 reflects a change in the survey question.

Source: Responses to the questions:
 - **Currently (this week) what is your work status?** (SWAA)
 - **For each day last week, did you work a full day (6 or more hours), and if so where?** (SWAA)
 - **In the last 7 days, have you...teleworked or worked from home?** (HHP)

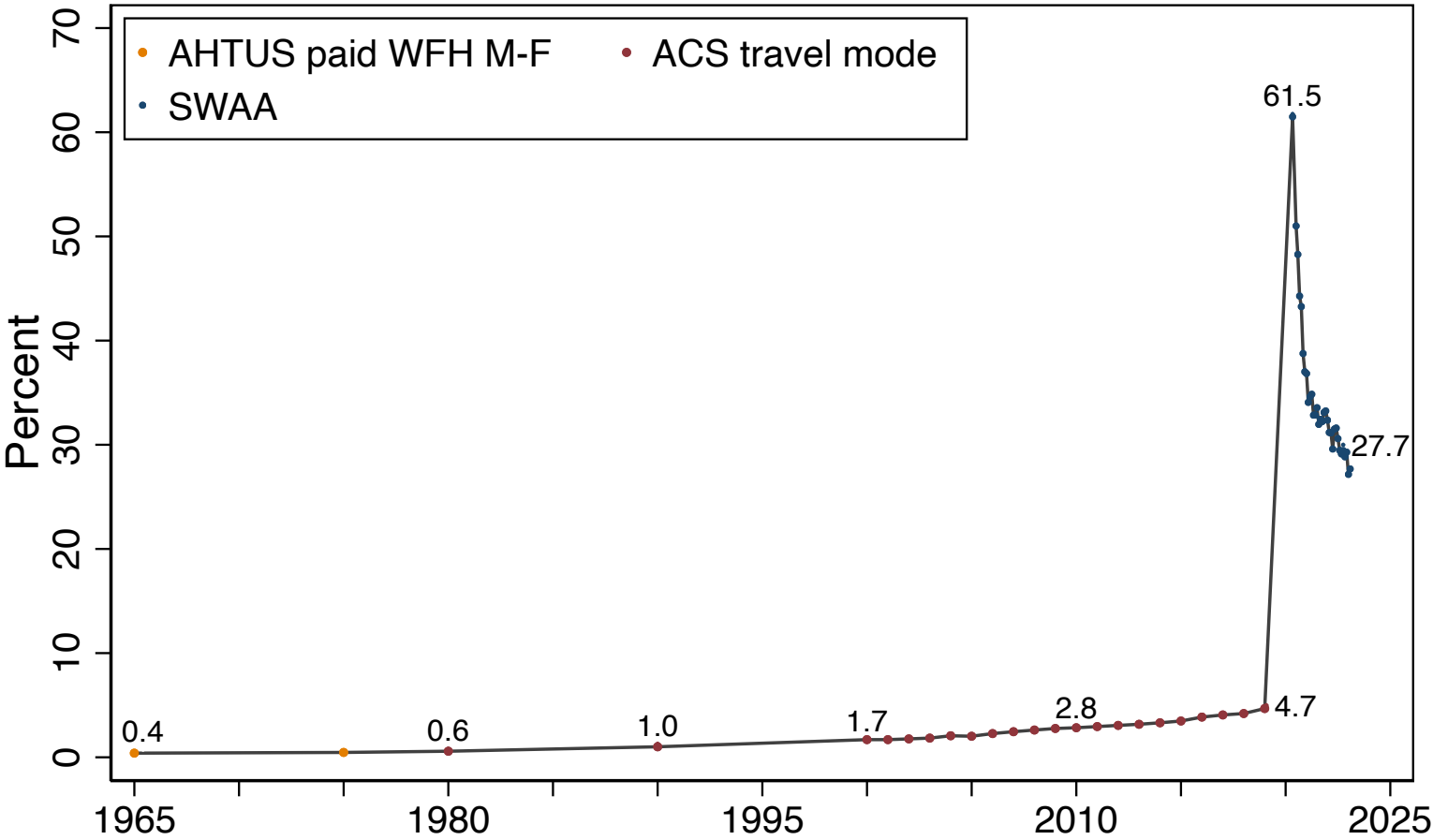
Notes: For each wave, we compute the percent of paid full days worked from home in the SWAA and Household Pulse Survey (HHP) and plot it on the vertical axis. The horizontal-axis location shows when the survey was in the field. The pre-COVID figure is from the 2017-2018 American Time Use Survey. SWAA: Before November 2020, we asked the first question above. Since November 2021, we have asked the second question. From November 2020 to October 2021, we back-cast responses to the current question using a regression model based on current-question responses and another question (not shown). We re-weight the sample of US residents aged 20 to 64 earning \$10,000 or more in a prior year to match CPS shares by age-sex-education-earnings cells. HHP: We focus on individuals aged 20 to 64 with household incomes above \$25,000 per year. We assign 30% of days WFH if the respondent did so for “for 1-2 days;” 70% if they did so “for 3-4 days;” 100% if “5 or more days;” and 0 for “No.”

N = 119,797 (SWAA) N = 289,327 (HHP)

The Pandemic Permanently Increased WFH, Equivalent to Almost 40 Years of Pre-Pandemic Growth



Historical WFH share



1965-1975 uses data from the American Historical Time Use Survey.
 1980-2019 uses data from American Community Survey.
 May 2020 - February 2022 uses data from the Survey of Working Arrangements and Attitudes.

Source: Responses to the questions:

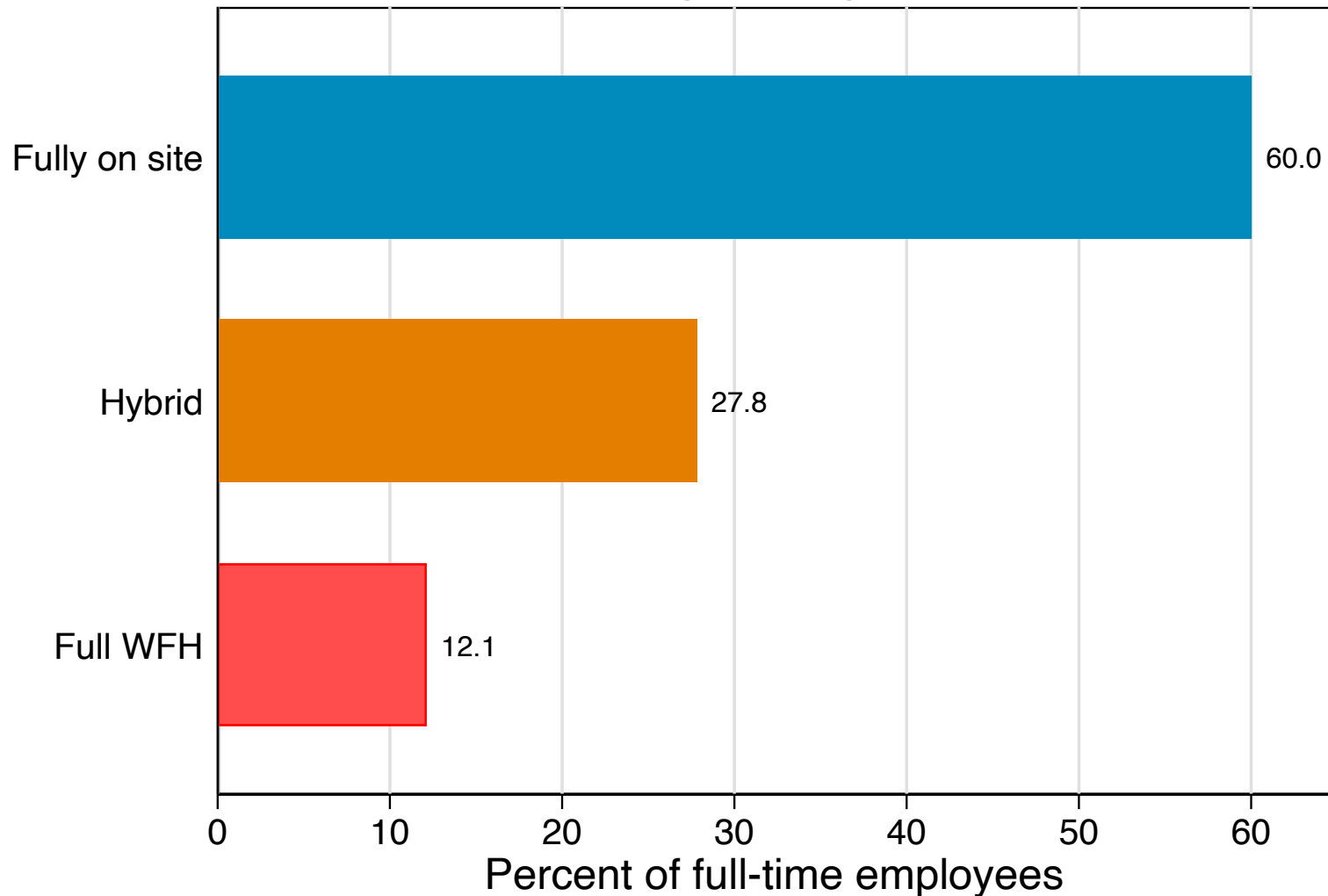
- *In their time diary the respondent listed the activity "Paid work at home" for **6 or more hours.** (AHTUS)*
- *How did this person **usually** get to work last week? (ACS)*
- *For each day last week, did you work a full day (6 or more hours), and, if so, where? (SWAA)*

Notes: For each dataset, we compute the percent of working individuals who worked full days at home during the survey's reference period. For the AHTUS and ACS, if an individual reports usually working from home, we mark them as working from home 100% of the time. In SWAA we compute the percent of full paid days at home to account for a hybrid work schedule. Then we plot each percentage on the vertical axis. We re-weight the sample of US residents aged 20 to 64 earning \$20,000 or more in 2019 dollars to overall population shares.

By Feb'23: 12% of Full-Time Employees Were Fully Remote, 60% Were Full-Time on Site, and 28% Were in a Hybrid Arrangement



Working Arrangements



Source: Responses to the questions:

- For each day last week, did you work a full day (6 or more hours), and if so where?

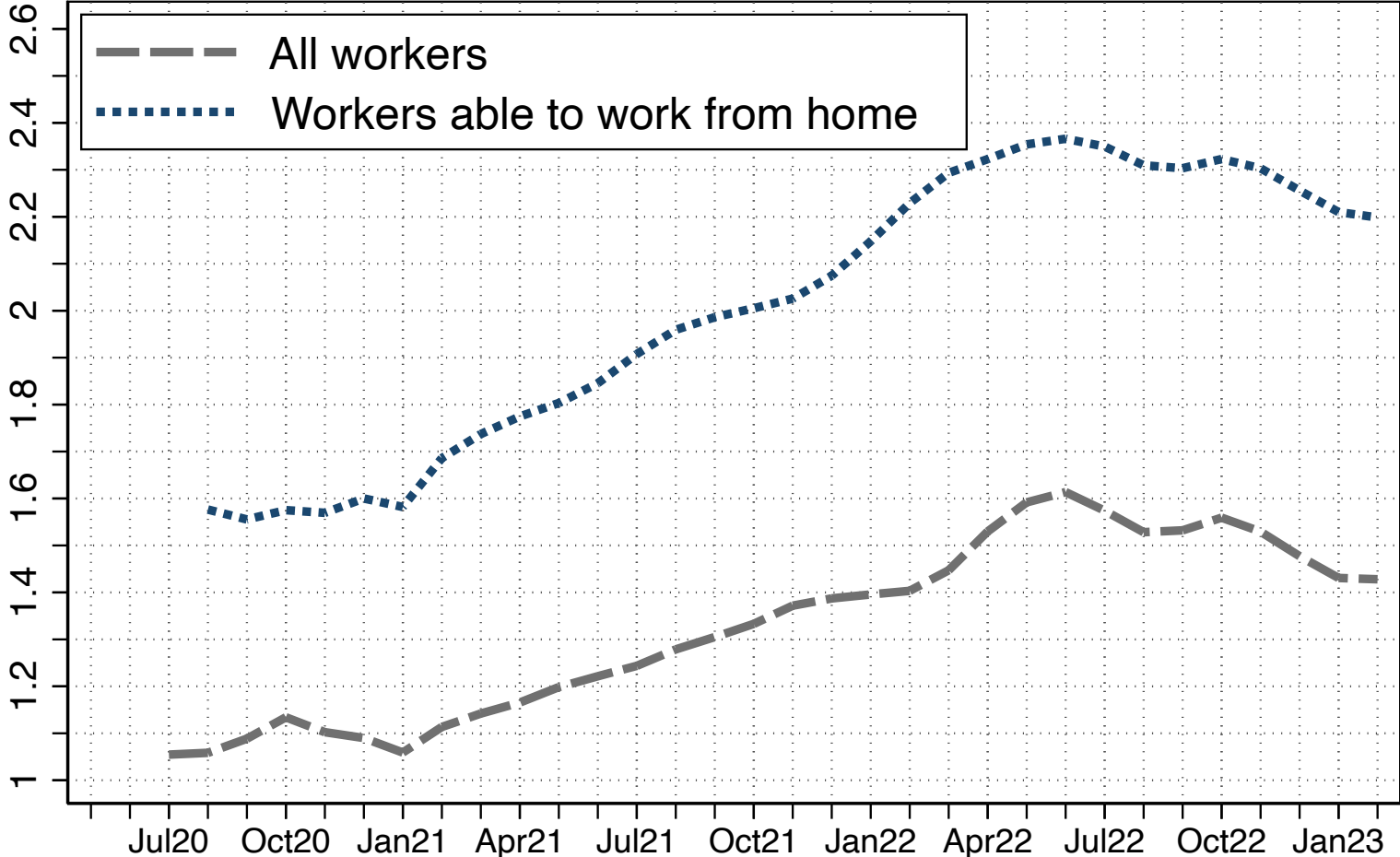
Notes: For each wave, we compute the percent of full-time (i.e. work 5+ days/week) wage and salary employees who either i) worked all their days on business premises; ii) worked some days on business premises and some days at home; or iii) worked all all days at home during the survey's reference week. Then we show the percentage for each group. The sample covers the November 2022 to February 2023 waves of the SWAA. We re-weight the sample of US residents aged 20 to 64 earning \$10,000 or more in a prior year to match CPS shares by age-sex-education-earnings cells.

N = 15,636

Employer Plans for WFH Trend Towards to 2.2 Days per Week for Persons Able to Work From Home



Average Days per Week Working From Home
As the Pandemic Ends: Employer plans



Responses to the question:

- *As the pandemic ends, how often is your employer planning for you to work full days at home?*

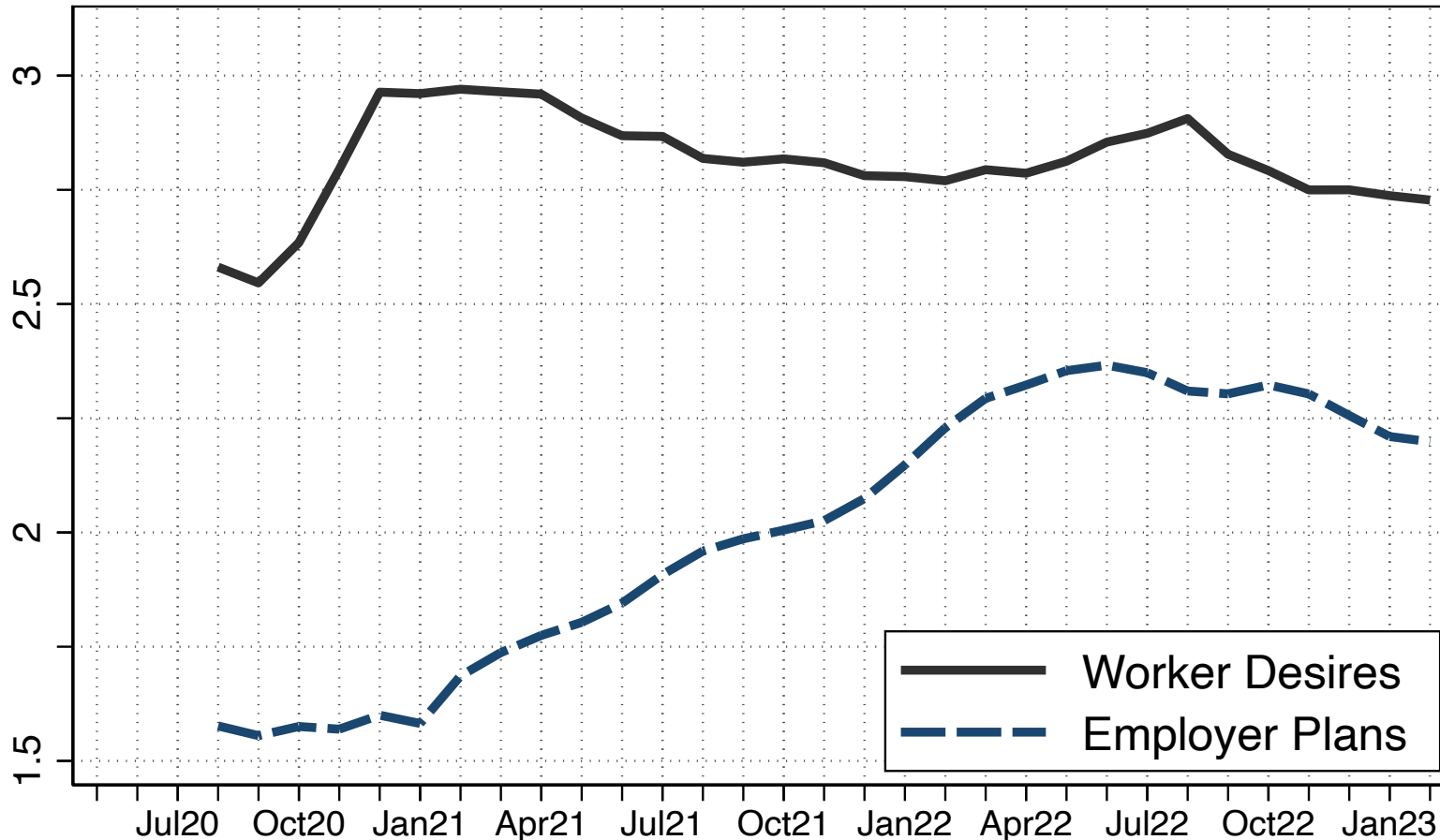
Sample: Data are from all SWAA waves, covering July 2020 to February 2023. The sample includes all respondents who reported their employer’s plans for WFH as the pandemic ends (“All workers” series), but the series labeled “Workers able to work from home” restricts attention to workers who have work-from-home experience during the pandemic. In both cases, we exclude respondents who report having no employer. We re-weight the sample of US residents aged 20 to 64 earning \$10,000 or more in a prior year to match Current Population Survey on age, sex, education, and earnings.

N = 133,219 (all respondents) and 94,671 (able to work from home)

The Gap Between How Much Employees Want to Work from Home and Employers Plan Is Stable at About 0.5 Days



Average Days per Week Working From Home After the Pandemic Ends: Workers Able to WFH



Responses to the questions:

- **As the pandemic ends, how often would you like to have full paid days at home?**
- **As the pandemic ends, how often is your employer planning for you to work full days at home?**

Sample: Data are from all SWAA waves, covering August 2020 to February 2023. The sample includes all respondents who responded to the relevant survey and have work-from-home experience during the pandemic. For the employer plans series, we exclude respondents who report having no employer.

N = 94,671 (employer plans, able to work from home)

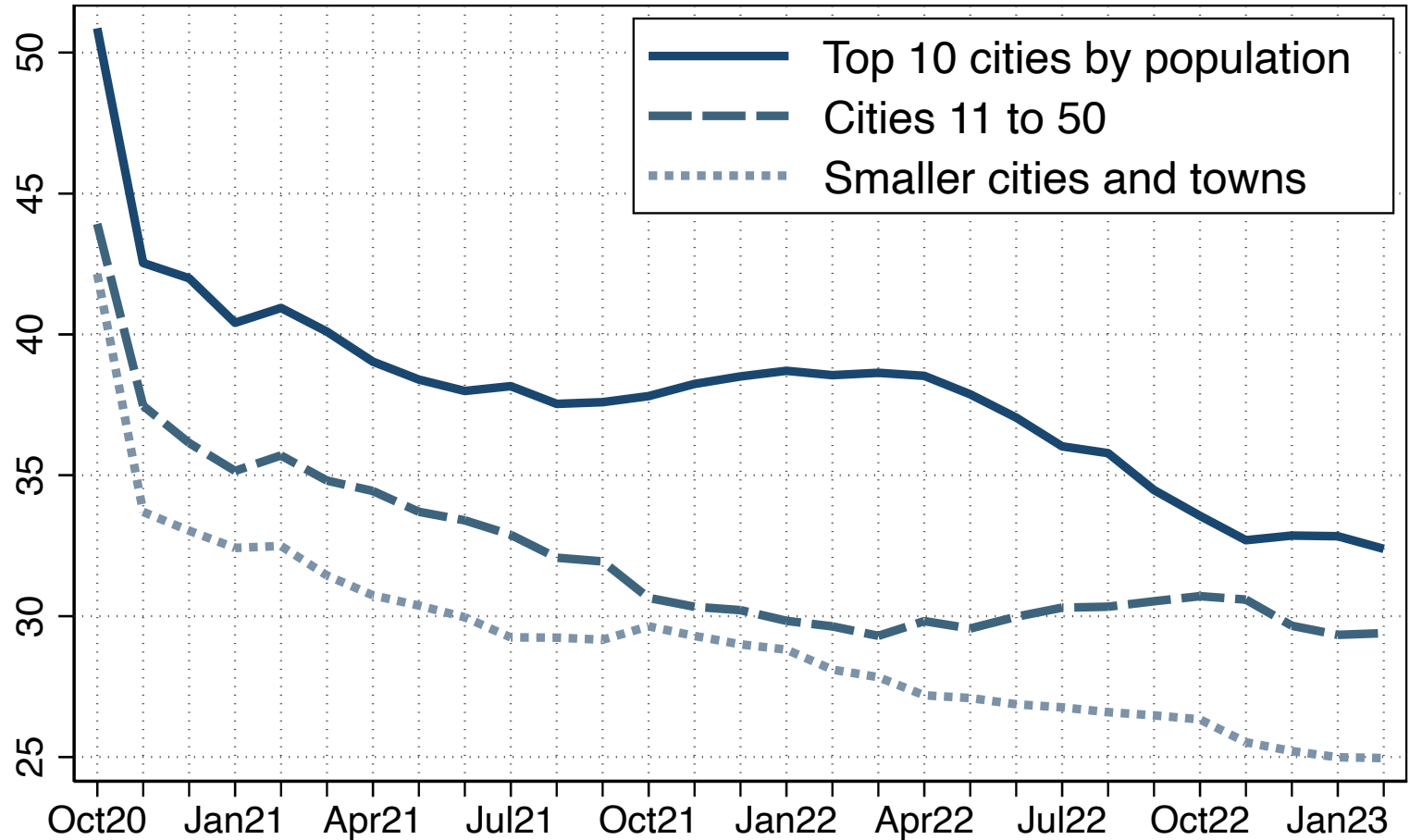
N = 101,941 (worker desires, able to work from home)

Sample: Workers able to work from home

Working From Home is More Common in Major Cities than in Smaller Cities and Towns. The Top 10 Cities Look A lot More Like Cities 11 to 50 than In Early 2022.



Percent of paid full days worked from home



Source: Responses to the questions:
 - **Currently (this week) what is your work status?**
 - **For each day last week, did you work a full day (6 or more hours), and if so where?**

Notes: The chart plots 6-month moving averages where available and 3-month moving averages prior to November 2020. For each wave, we compute the percent of paid full days worked from home and plot it on the vertical axis, after sorting respondents into cities (i.e., Combined Statistical Areas) by the location of their current job's business premises. Before November 2020, we asked the first question above. Since November 2021, we have asked the second question. From November 2020 to October 2021, we back-cast responses to the current question using a regression model that relates the current-question responses to the responses to another question (not shown). We re-weight the sample of US residents aged 20 to 64 earning \$10,000 or more in a prior year to match CPS shares by age-sex-education-earnings cells.

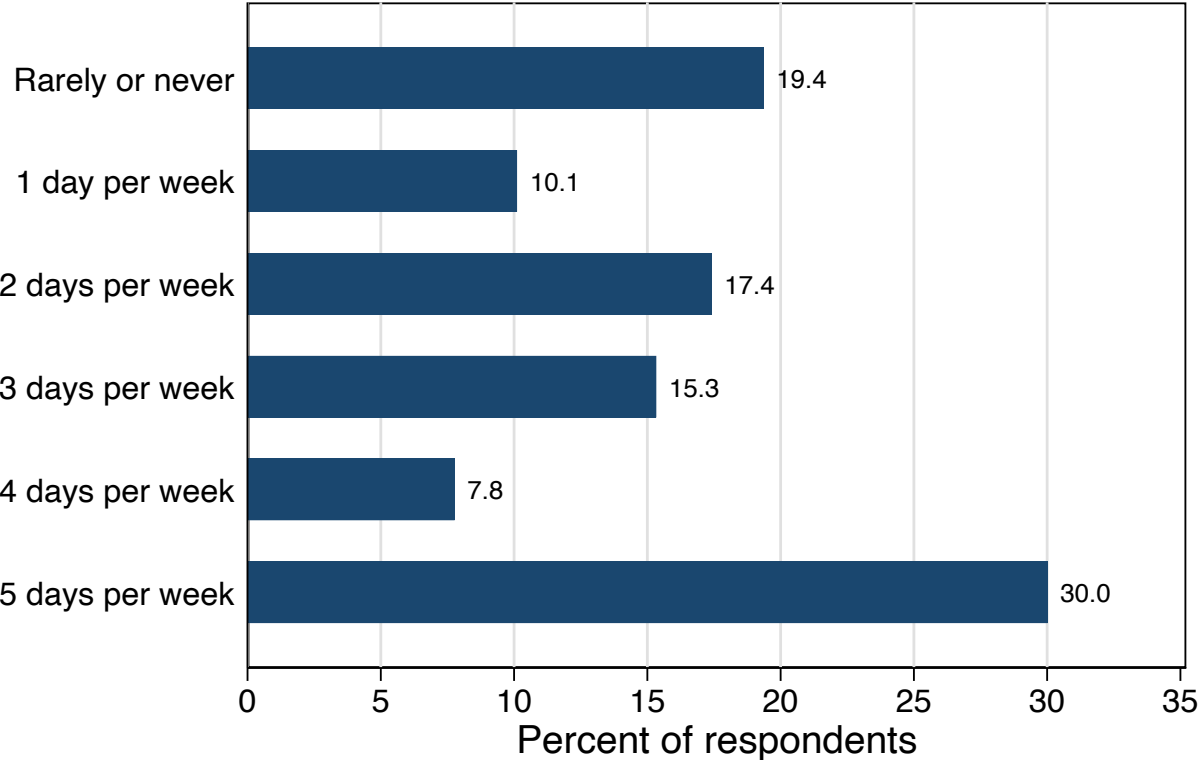
*We define cities using Combined Statistical Areas and use the location of the respondent's current job.

N = 110,266

Employers Offer Fewer Fully Remote Jobs and More Fully Onsite Jobs Than Employees Want

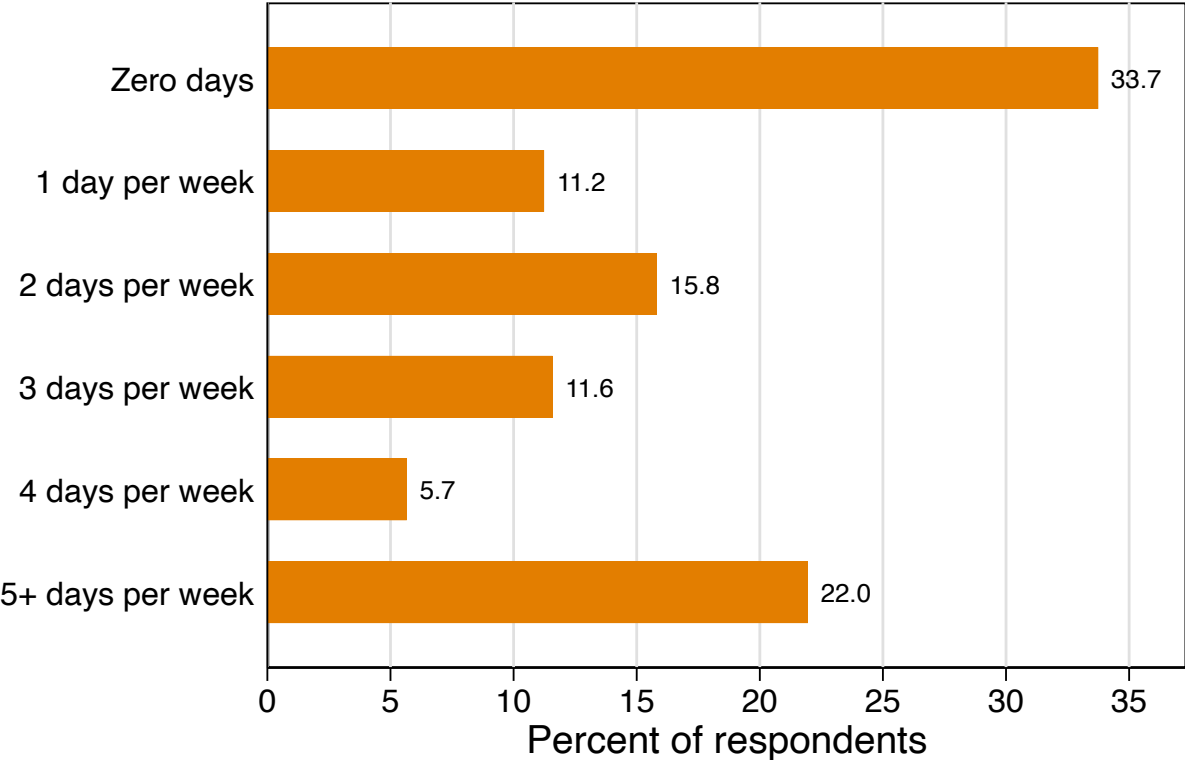


Worker desired amount of post-COVID WFH days



Sample: Full-time wage and salary employees who are able to WFH. N = 10483

Current amount of post-COVID WFH days



Sample: Full-time wage and salary employees who are able to WFH. N = 9972

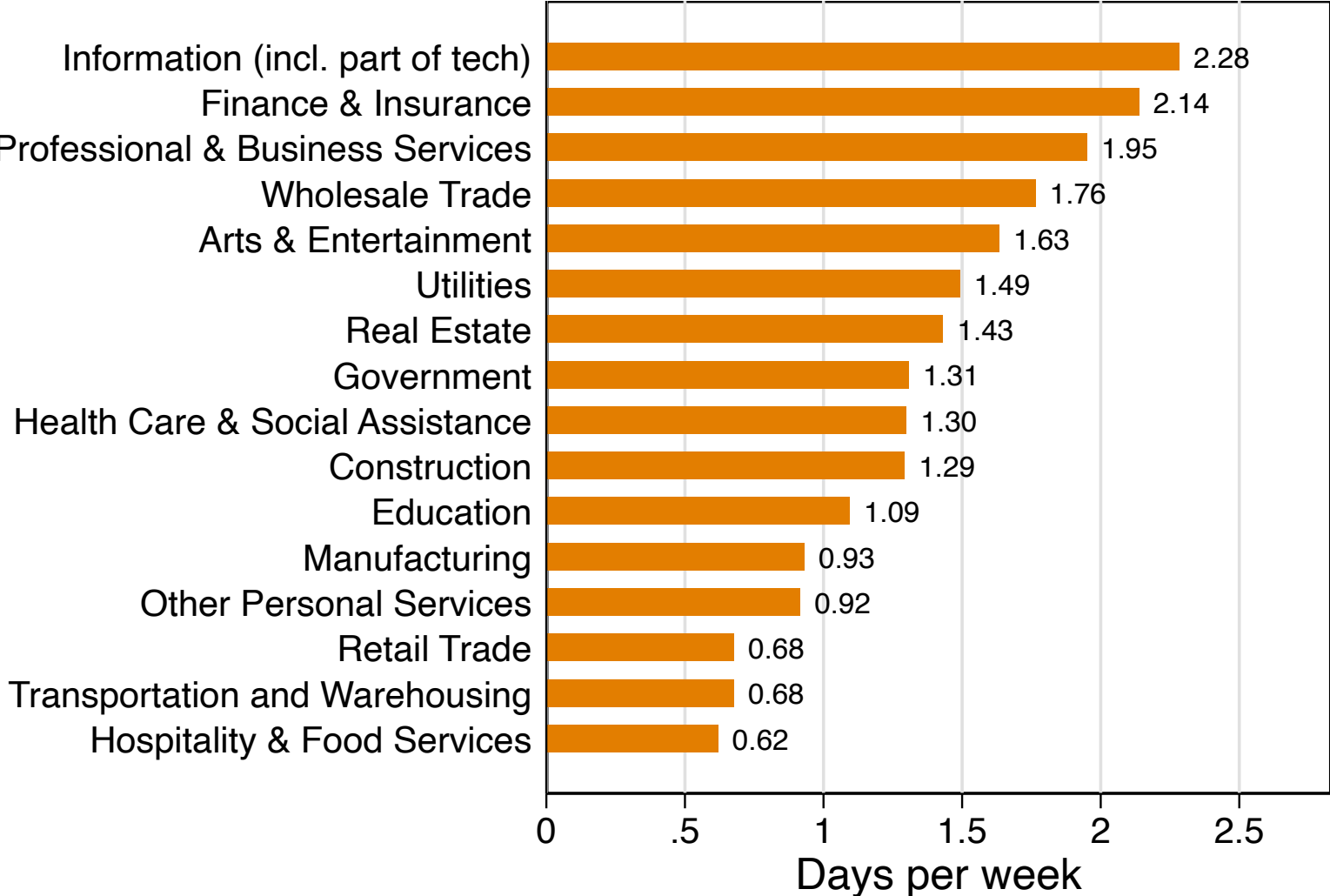
Responses to the questions: *As the pandemic ends*, how often would you **like to** have paid workdays at home? *For each day last week*, did you **work a full day (6 or more hours)**, and if so **where**?

Sample: Data are from the November 2022 to February 2023 SWAA waves. The sample includes full-time wage and salary employees (i.e. who worked 5 or more days during the survey reference week) who have work-from-home experience during the pandemic and pass the attention-check questions. Numbers for “5 days per week” in the right chart include responses for 6 or 7 full days worked from home. We re-weight the sample of US residents aged 20 to 64 earning \$10,000 or more in 2019 or 2021 to match Current Population Survey on age, sex, education, and earnings.

Working from Home is Most Prevalent in the Tech, Finance, and Professional and Business Services Sectors



Current working from home: All wage and salary employees



Responses to the question:
 - For each day last week, did you work a full day (6 or more hours), and if so where?

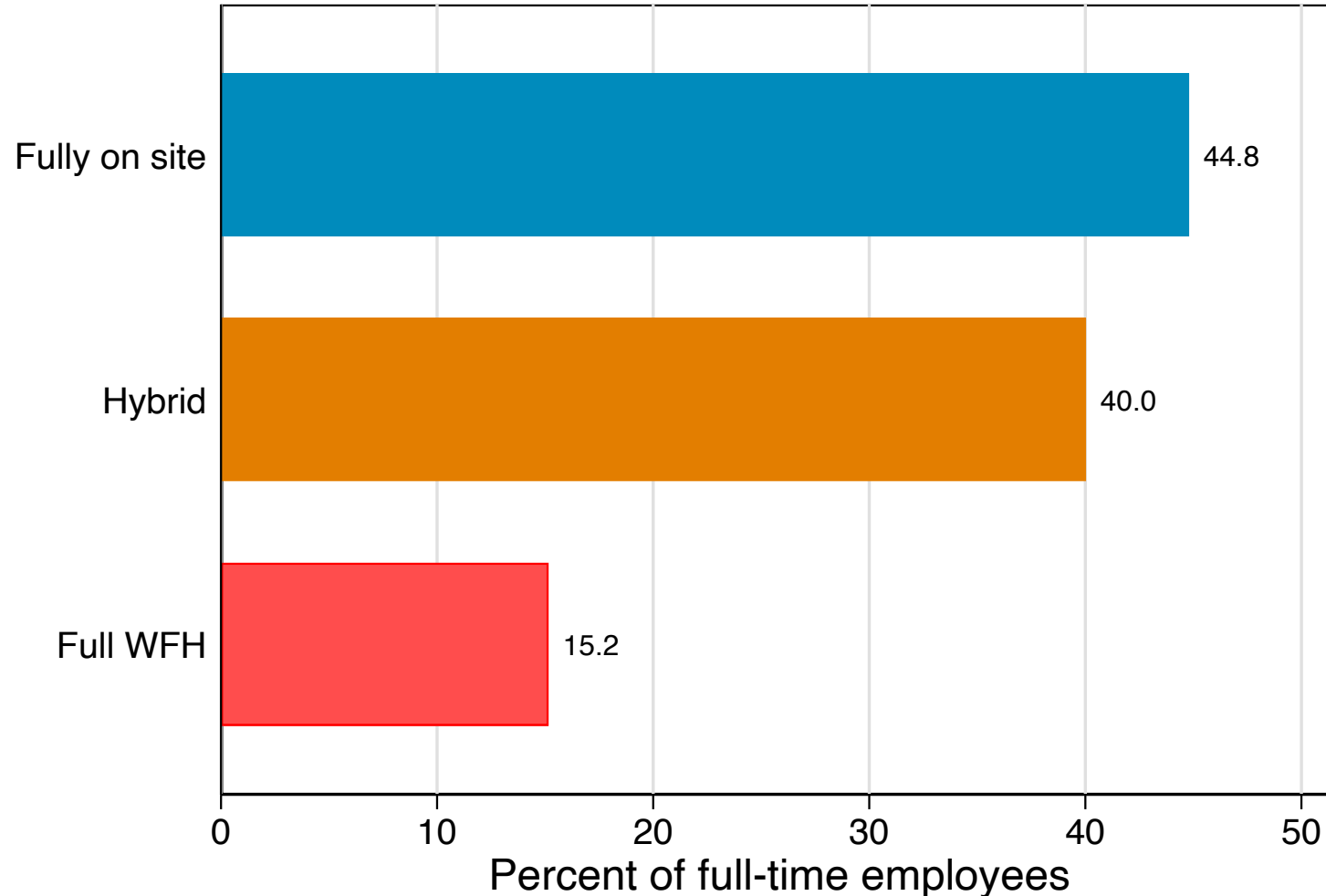
Sample: Data are from the September 2022 to February 2023 SWAA waves. The sample includes all wage and salary employees who pass the attention-check questions. We exclude mining due to insufficient observations and agriculture to focus on non-farm jobs. We re-weight the sample of US residents aged 20 to 64 earning \$10,000 or more in a prior year to match Current Population Survey on age, sex, education, and earnings.

N = 26,567

For College Graduates Fully On-Site and Hybrid are the Most Common Working Patterns



Working Arrangements



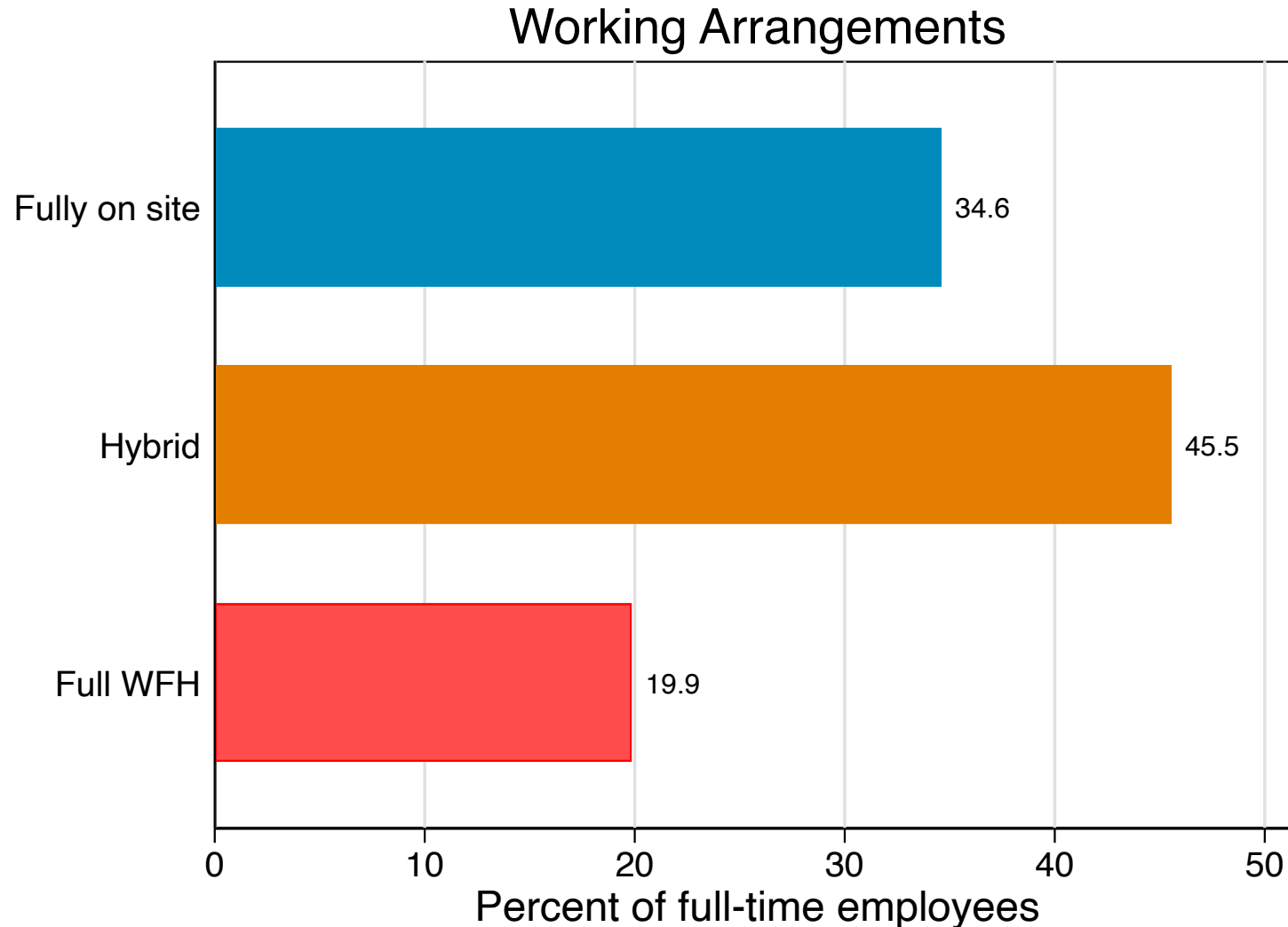
Source: Responses to the questions:

- *For each day last week, did you work a full day (6 or more hours), and if so where?*

Notes: For each wave, we compute the percent of full-time (i.e. work 5+ days/week) wage and salary employees with at least a 4-year college degree who either i) worked all their days on business premises; ii) worked some days on business premises and some days at home; or iii) worked all all days at home during the survey's reference week. Then we show the percentage for each group. The sample covers the November 2022 to February 2023 waves of the SWAA. We re-weight the sample of US residents aged 20 to 64 earning \$10,000 or more in 2019 or 2021 to match CPS shares by age-sex-education-earnings cells.

N = 9,039

For Employees that Can Work from Home, the Most Common Practice is Hybrid



Source: Responses to the questions:

- *For each day last week, did you work a full day (6 or more hours), and if so where?*

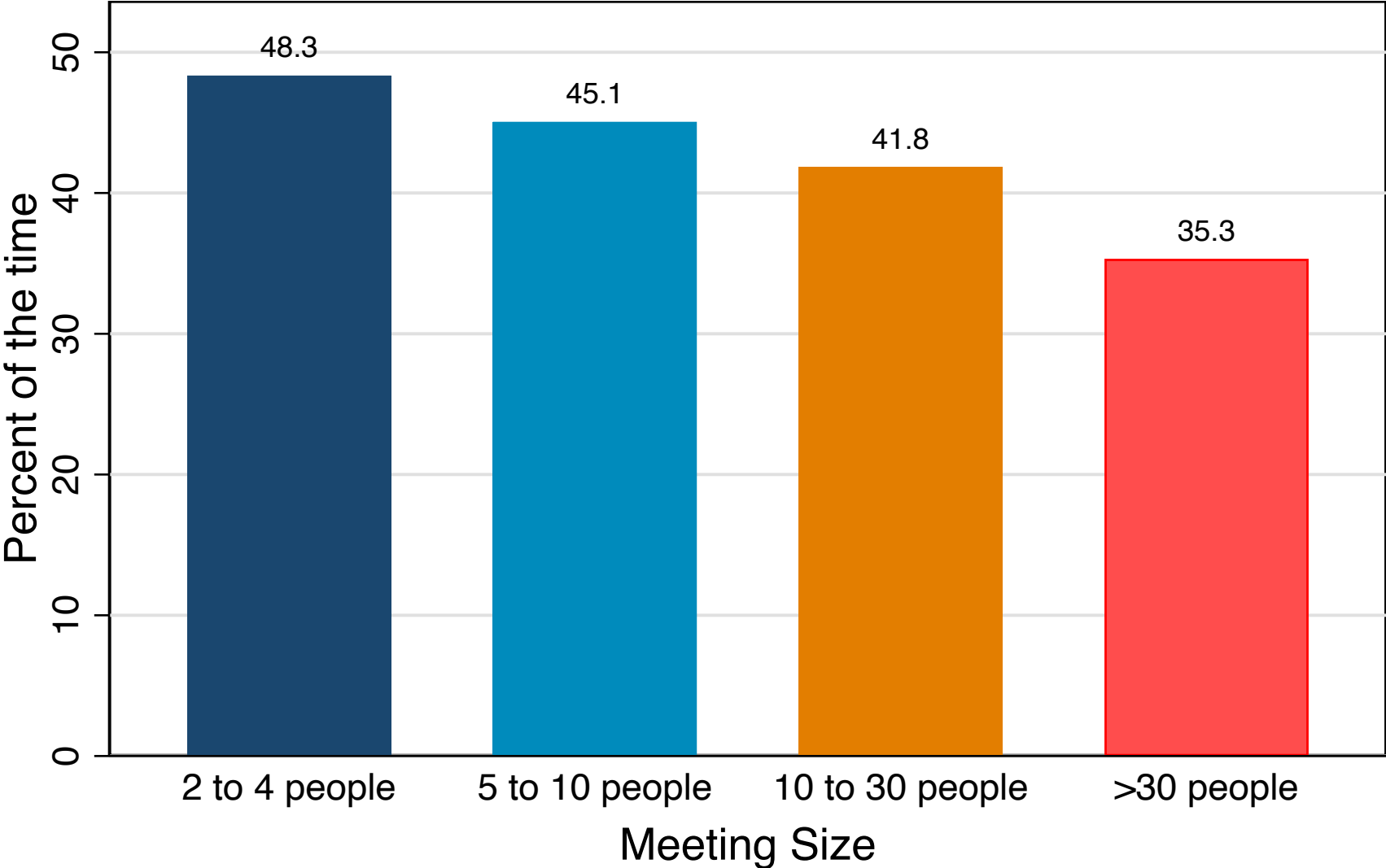
Notes: For each wave, we compute the percent of full-time (i.e. work 5+ days/week) wage and salary employees who are able to work from home and either i) worked all their days on business premises; ii) worked some days on business premises and some days at home; or iii) worked all all days at home during the survey's reference week. Then we show the percentage for each group. We infer that somebody is able to work from home if they currently do so 1+ days per week, or did so at some point since the start of COVID. The sample covers the November 2022 to February 2023 waves of the SWAA. We re-weight the sample of US residents aged 20 to 64 earning \$10,000 or more in 2019 or 2021 to match CPS shares by age-sex-education-earnings cells.

N = 11,386

Employees Have Their Video On In Less Than Half of Meetings



During work meetings on Teams/Zoom/Webex how often do you have your camera on?



Responses to the question:

- *During work meetings on Teams, Zoom, Webex, or other video-conferencing platforms, how often do you have your camera on (showing your face)?*

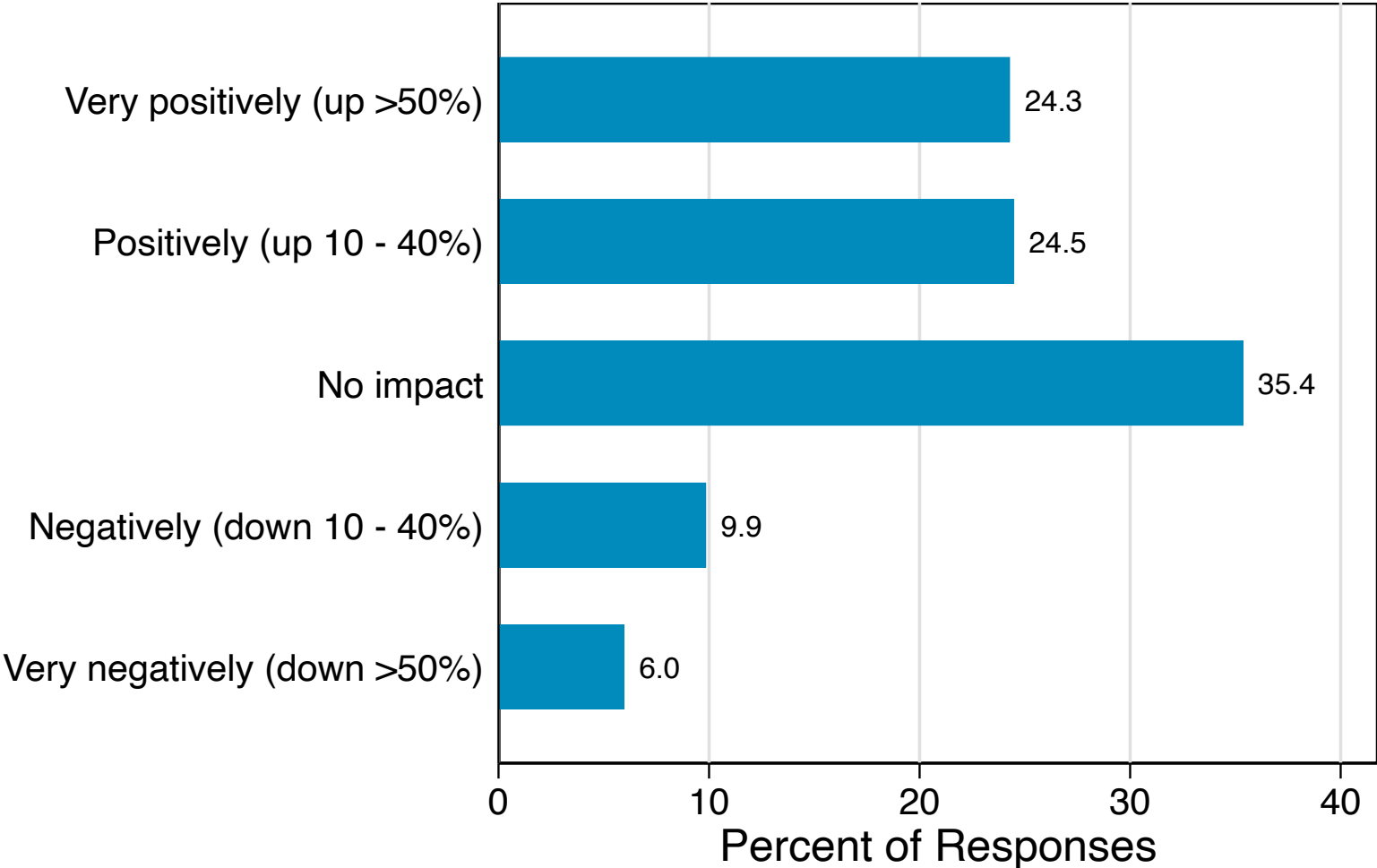
Notes: The sample includes respondents to the January 2023 SWAA who worked during the previous week or who worked from home at some point since the start of the COVID-19 pandemic. We exclude respondents who say the question does not apply to them, and those who fail any of the attention-check questions. We re-weight the sample to match the Current Population Survey on age, sex, education, and earnings.

N = 4,526.

Half of Workers Say their Engagement Rises When They Turn On Their Cameras For Video Call Meetings



During work meetings on Teams/Zoom/Webex how does having your camera on impact your engagement?



Responses to the question:

- *During work meetings on Teams, Zoom, Webex, or other video-conferencing platforms, how does having your camera on (showing your face) impact your engagement?*

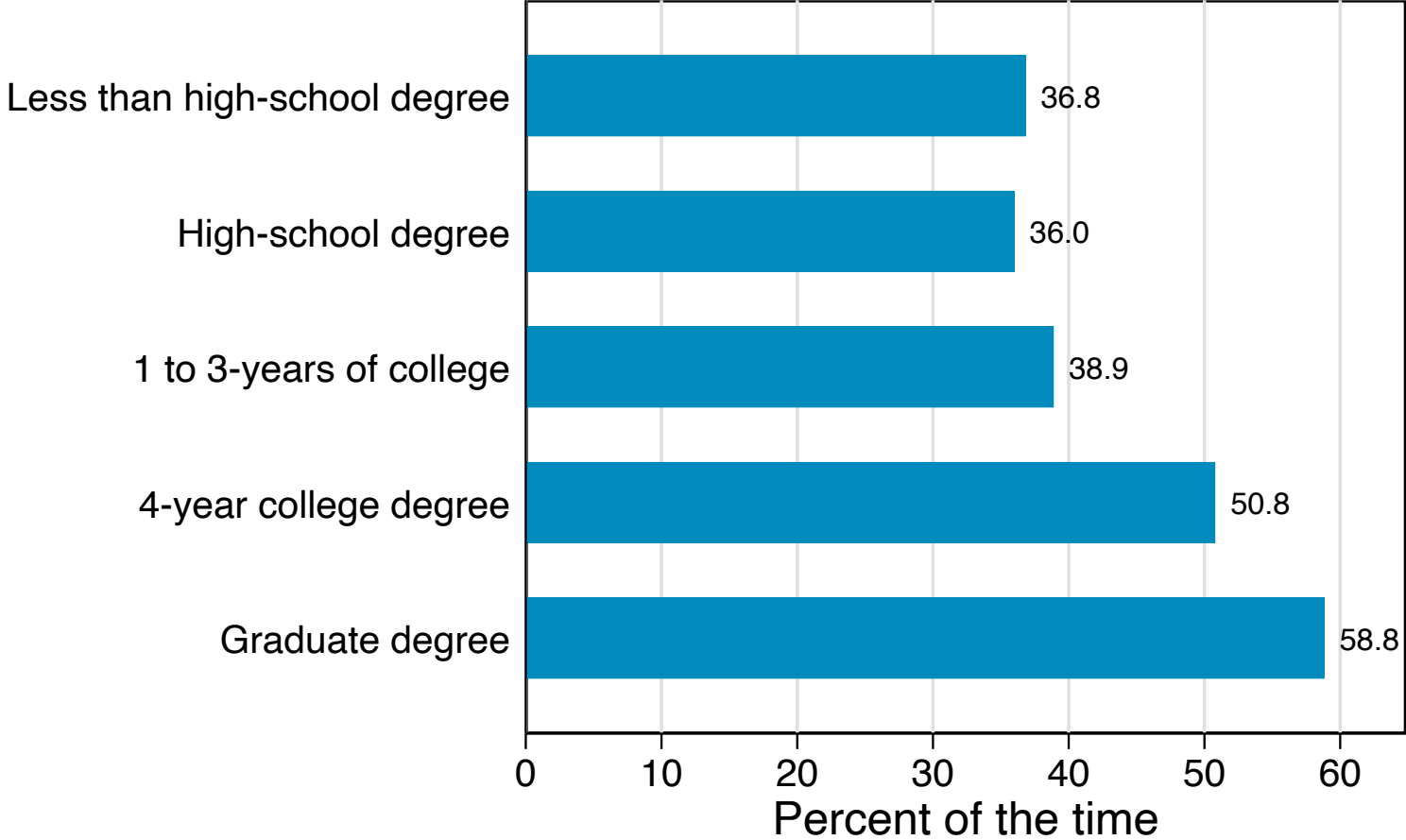
Notes: The sample includes respondents to the January 2023 SWAA who worked during the previous week or who worked from home at some point since the start of the COVID-19 pandemic. We exclude respondents who say the question does not apply to them, and those who fail any of the attention-check questions. To construct the figure, we average across the four meeting sizes. We re-weight the sample to match the Current Population Survey on age, sex, education, and earnings.

N = 4,240.

Workers Without a Bachelor's Degree Turn Their Camera On Less Frequently than College Graduates



During work meetings on Teams/Zoom/Webex how often do you have your camera on?



Data for 5 to 10 person meetings.

Responses to the question:

- *During work meetings on Teams, Zoom, Webex, or other video-conferencing platforms, how often do you **have your camera on** (showing your face)?*

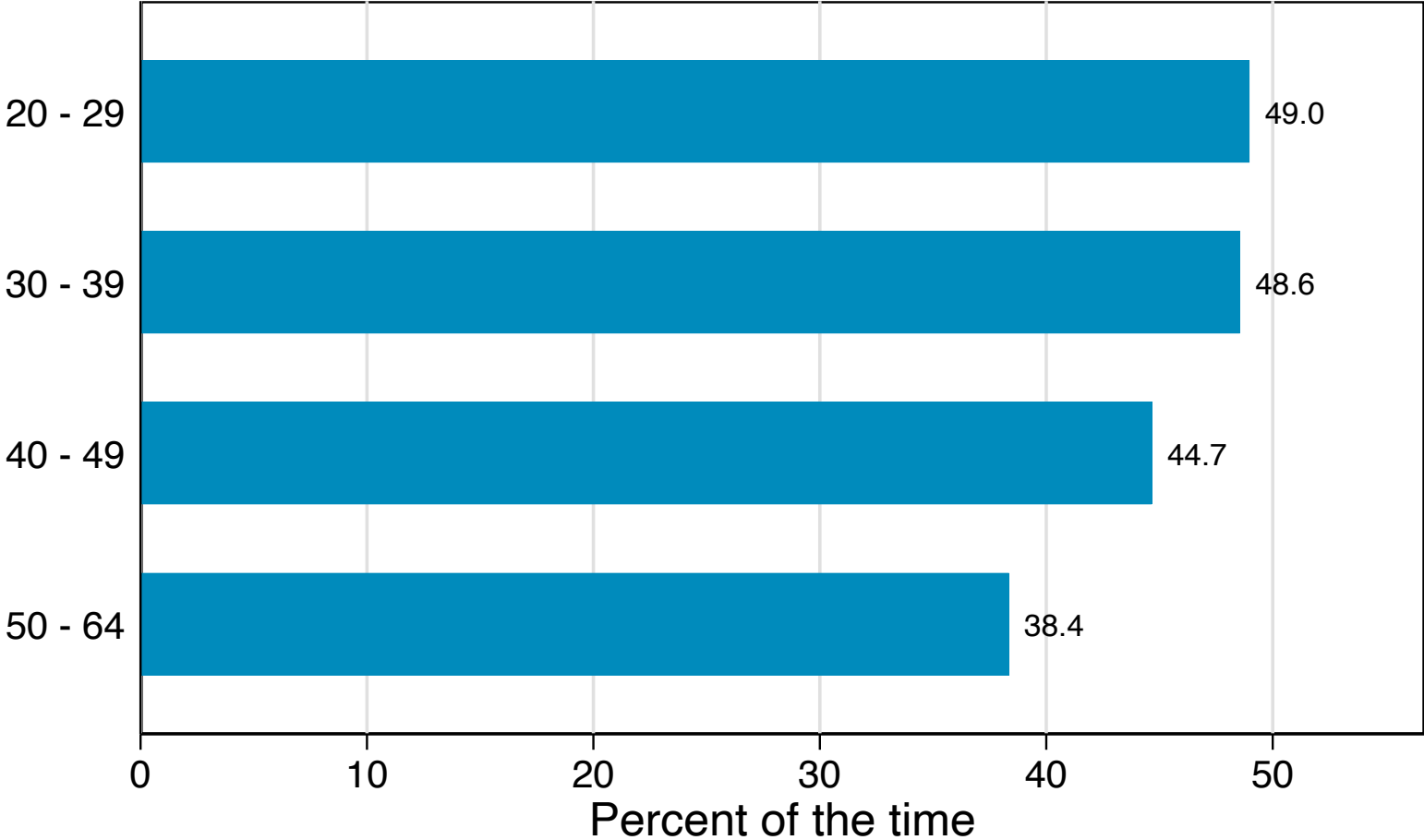
Notes: The sample includes respondents to the January 2023 SWAA who worked during the previous week or who worked from home at some point since the start of the COVID-19 pandemic. We exclude respondents who say the question does not apply to them, and those who fail any of the attention-check questions. We re-weight the sample to match the Current Population Survey on age, sex, education, and earnings.

N = 4,389.

Workers Over 40 Turn Their Camera On Less Frequently than Those Under 40



During work meetings on Teams/Zoom/Webex how often do you have your camera on?



Data for 5 to 10 person meetings.

Responses to the question:

- During work meetings on Teams, Zoom, Webex, or other video-conferencing platforms, how often do you **have your camera on** (showing your face)?

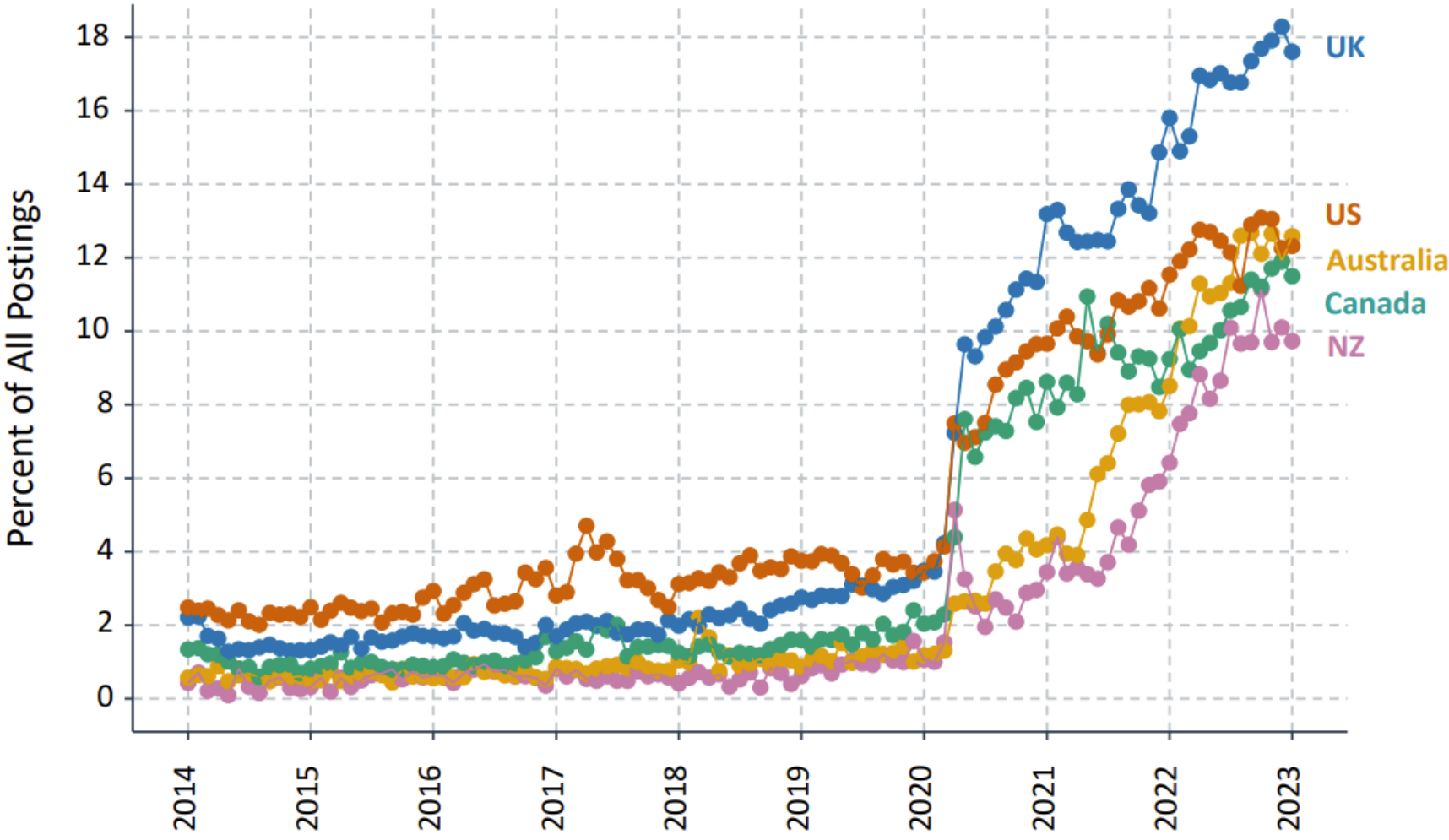
Notes: The sample includes respondents to the January 2023 SWAA who worked during the previous week or who worked from home at some point since the start of the COVID-19 pandemic. We exclude respondents who say the question does not apply to them, and those who fail any of the attention-check questions. We re-weight the sample to match the Current Population Survey on age, sex, education, and earnings.

N = 4,389.

WFH Job Posting Levels Surged After 2020, and Now Look to Be Stabilizing in Early 2023 at a Post-pandemic Normal



Percent of job-postings offering hybrid or remote work

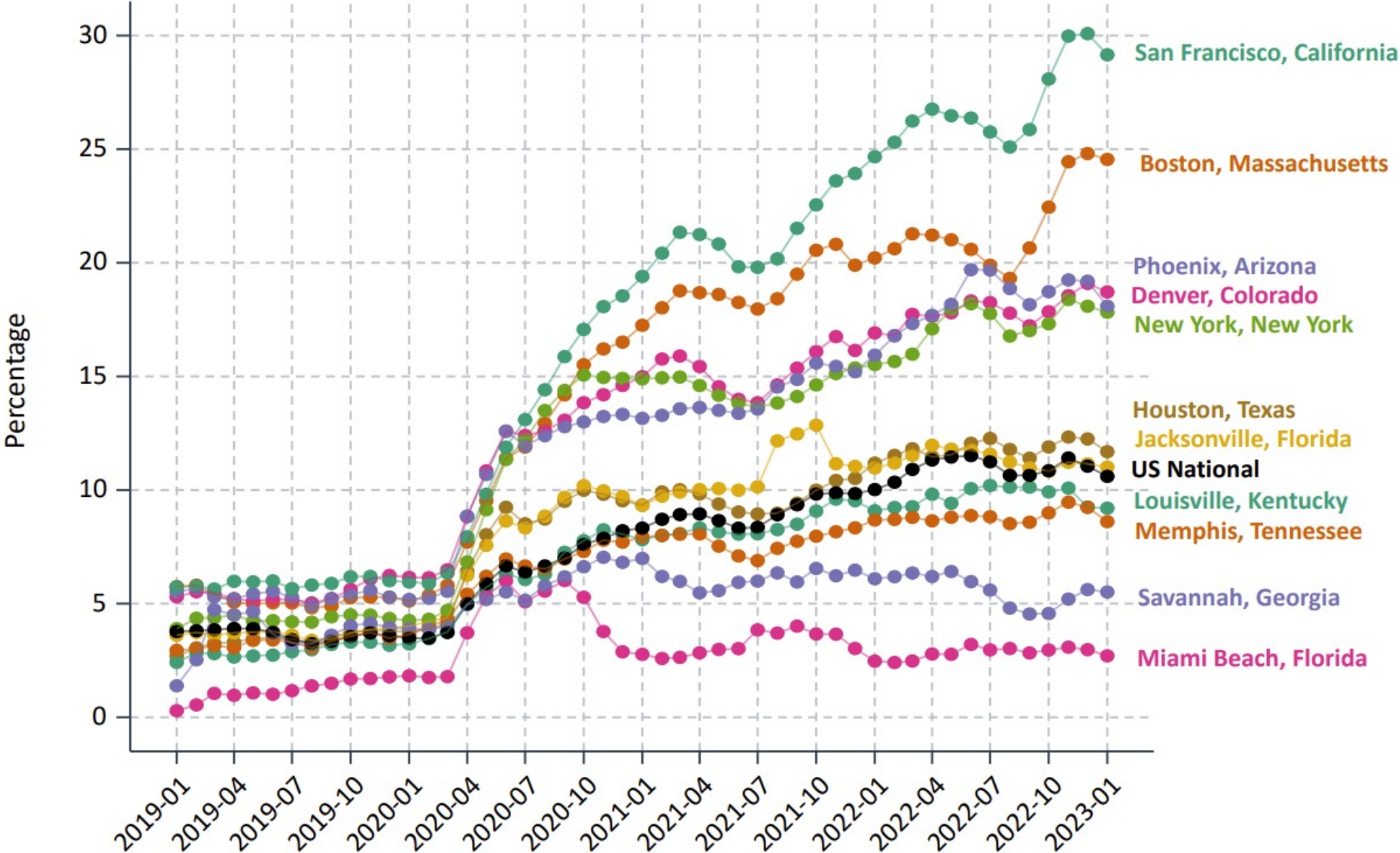


Notes: Share of vacancy postings that say a job allows one or more days remote working per week, covering fully remote and hybrid. Natural language processing of all online jobs in the US, around 43 million in 2022 from Lightcast. From the research paper “Remote work across jobs, companies and space” by Stephen Hansen, Peter Lambert, Nicholas Bloom, Steven Davis, Raffaella Sadun and Bledi Taska. Data from www.wfhmap.com

WFH Job-Posting Levels are Highest in Large Cities



Percent of job-postings offering hybrid or remote work

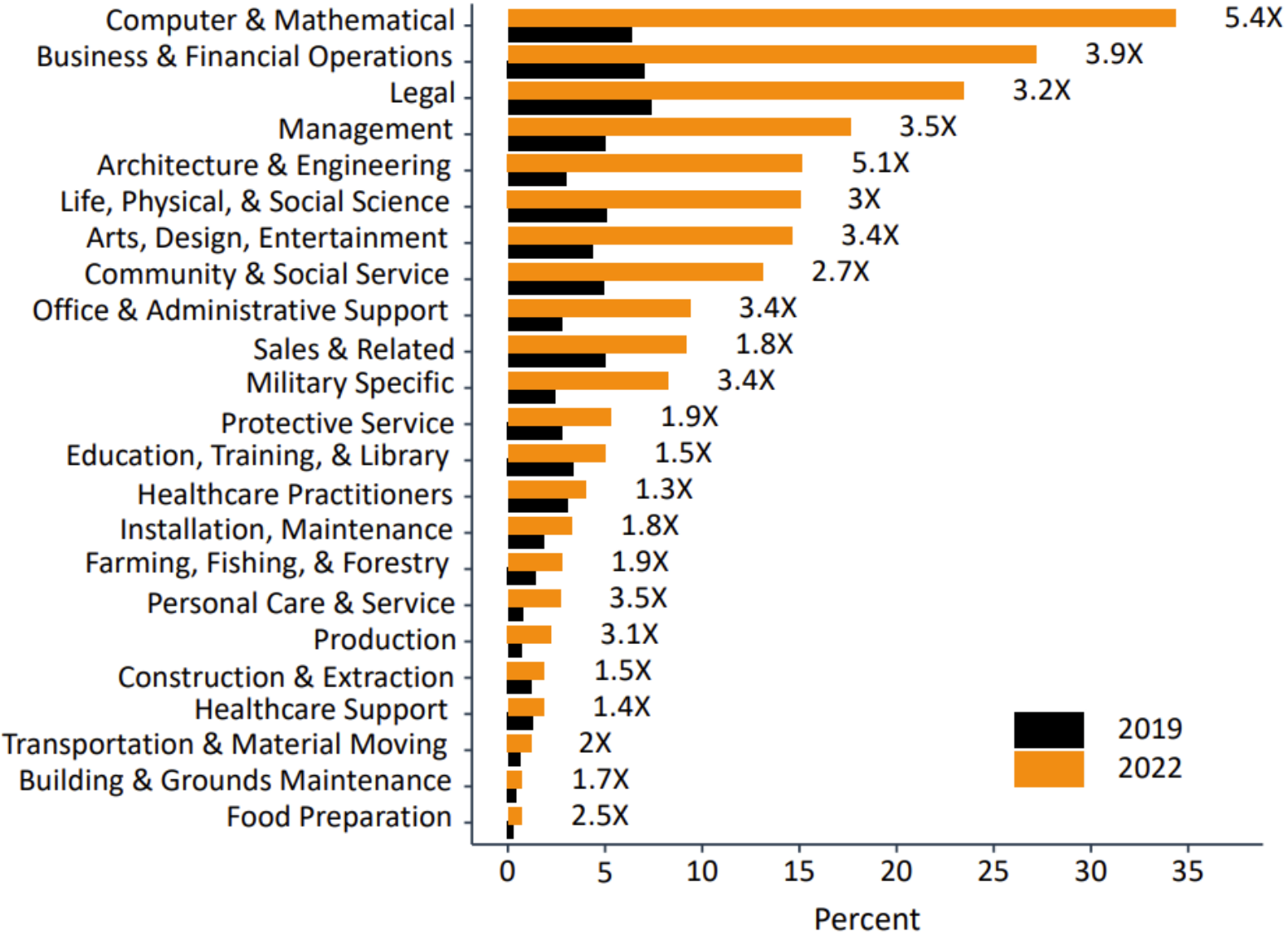


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WFH Levels Vary Heavily Across Occupations



Percent of job-postings offering hybrid or remote work



Notes: Share of vacancy postings that say a job allows one or more days remote working per week, covering fully remote and hybrid. Natural language processing of all online jobs in the US, around 43 million in 2022 from Lightcast. From the research paper “Remote work across jobs, companies and space” by Stephen Hansen, Peter Lambert, Nicholas Bloom, Steven Davis, Raffaella Sadun and Bledi Taskas. Data from www.wfhmap.com

References



- Barrero, Jose Maria, Nicholas Bloom, and Steven J. Davis, 2021. “Why working from home will stick,” National Bureau of Economic Research Working Paper 28731.