SWAA October 2024 Updates*

Jose Maria Barrero, Nicholas Bloom, Shelby Buckman, and Steven J. Davis

5 October 2024

Latest survey wave included: September 2024

To sign up for regular results updates, please sign up here.

* Many thanks to Mert Akan for excellent research assistance.

Source of Data and Citation

- **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

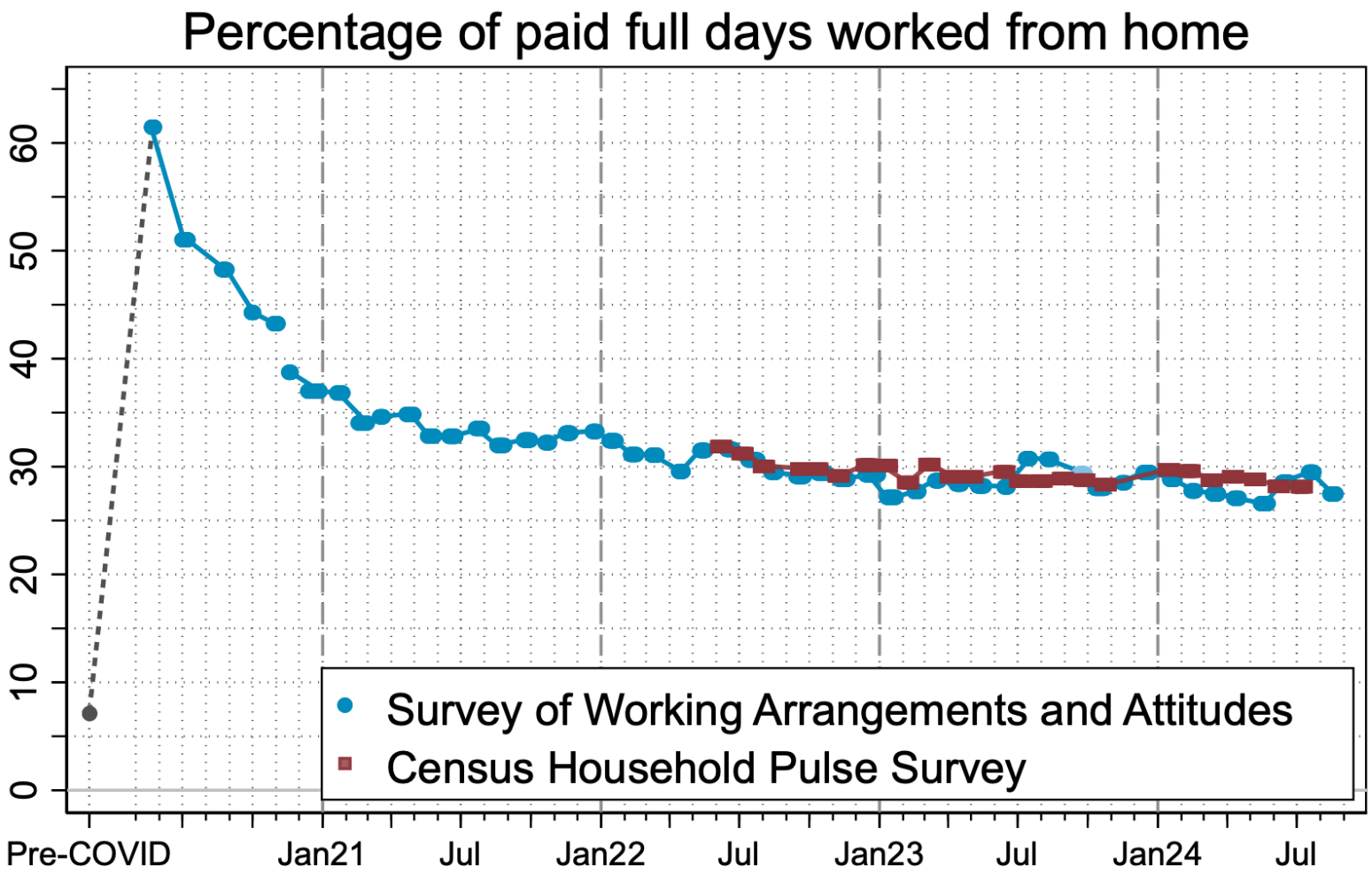
The Survey of Working Arrangements and Attitudes

- Monthly online survey since May 2020, >200,000 observations to date.
- We design the survey instrument.
- Target population: U.S. residents, 20-64, who earned ≥ $10K in 2019 (≥$20K in early survey waves). From January to March 2022, we transitioned to earned ≥ $10K in the prior year. As of July 2023, we also now developed a dataset for 2022 and later that does not impose an earnings requirement.
- 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. When noted, some results using 2022 and later data do not impose an earnings requirement.
- 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.

About 28% of Paid Days in the US in September 2024 Were Work-From-Home Days



*We estimate the pre-COVID rate using the 2019 American Time Use Survey
*The break in the series in November 2020 reflects a change in the survey question.
*The SWAA Sept. 2023 estimate averages August and October due to data quality issues in September.

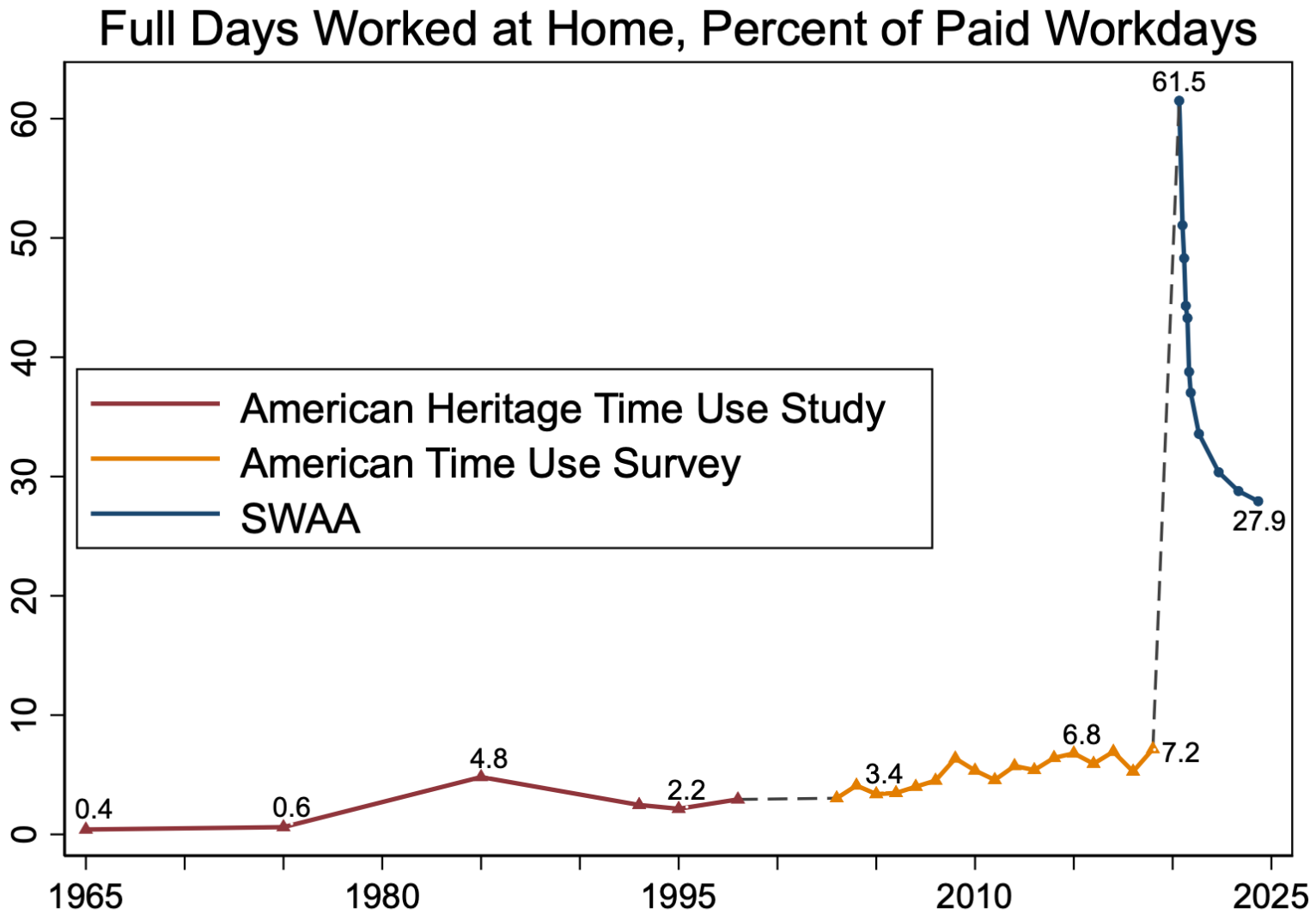
Source: Responses to the questions:

- **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 = 203,106 (SWAA) N = 923,587 (HHP)

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

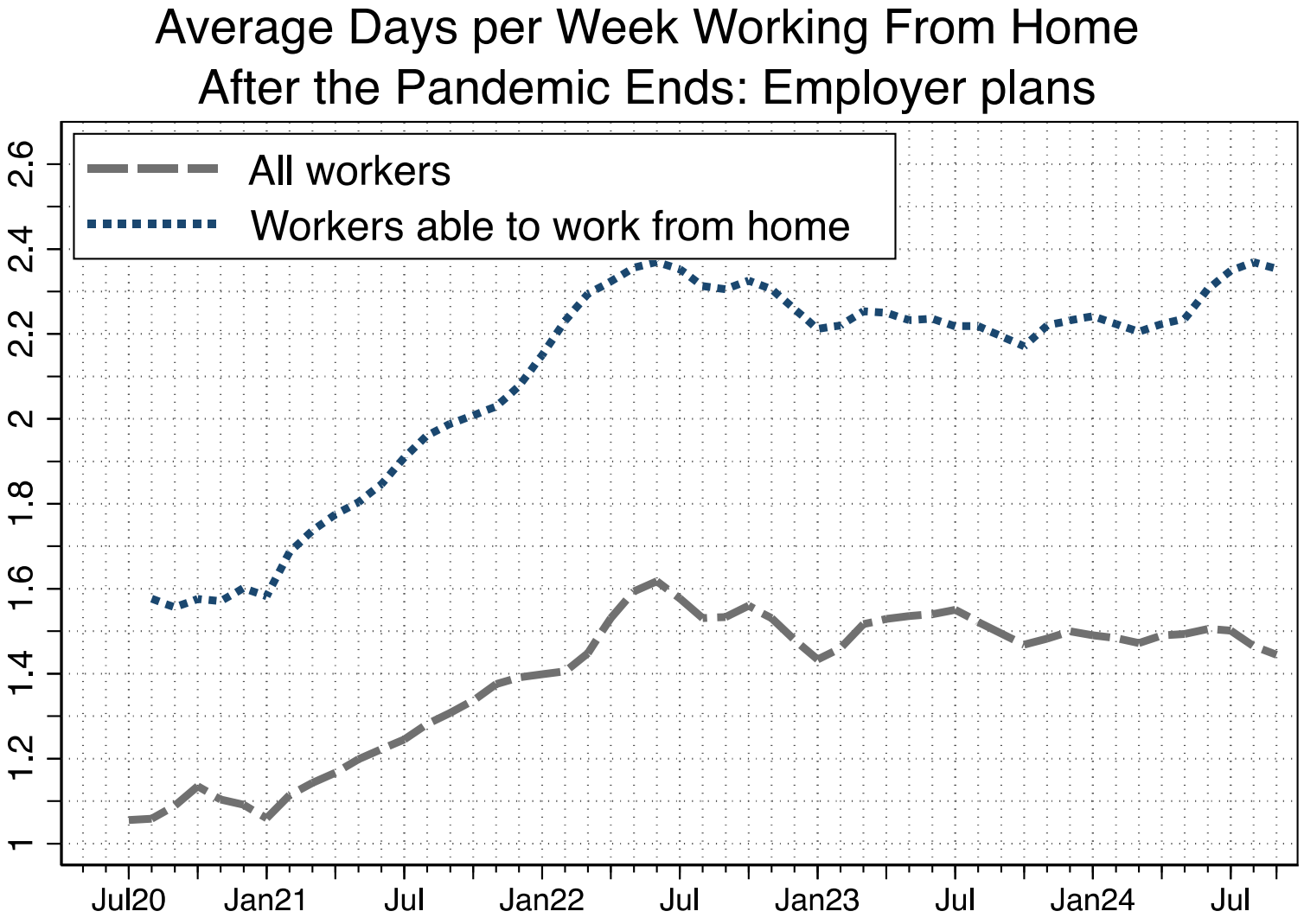


Source: Responses to the questions:

- *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, and calculate monthly averages. We report those monthly values in 2020 and combine them into yearly averages from 2021 onwards. 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. We impute the September 2023 data value as the average of August and October due to data quality issues.

Employer Plans for WFH Trend Near 2.3 Days per Week for Persons Able to Work From Home



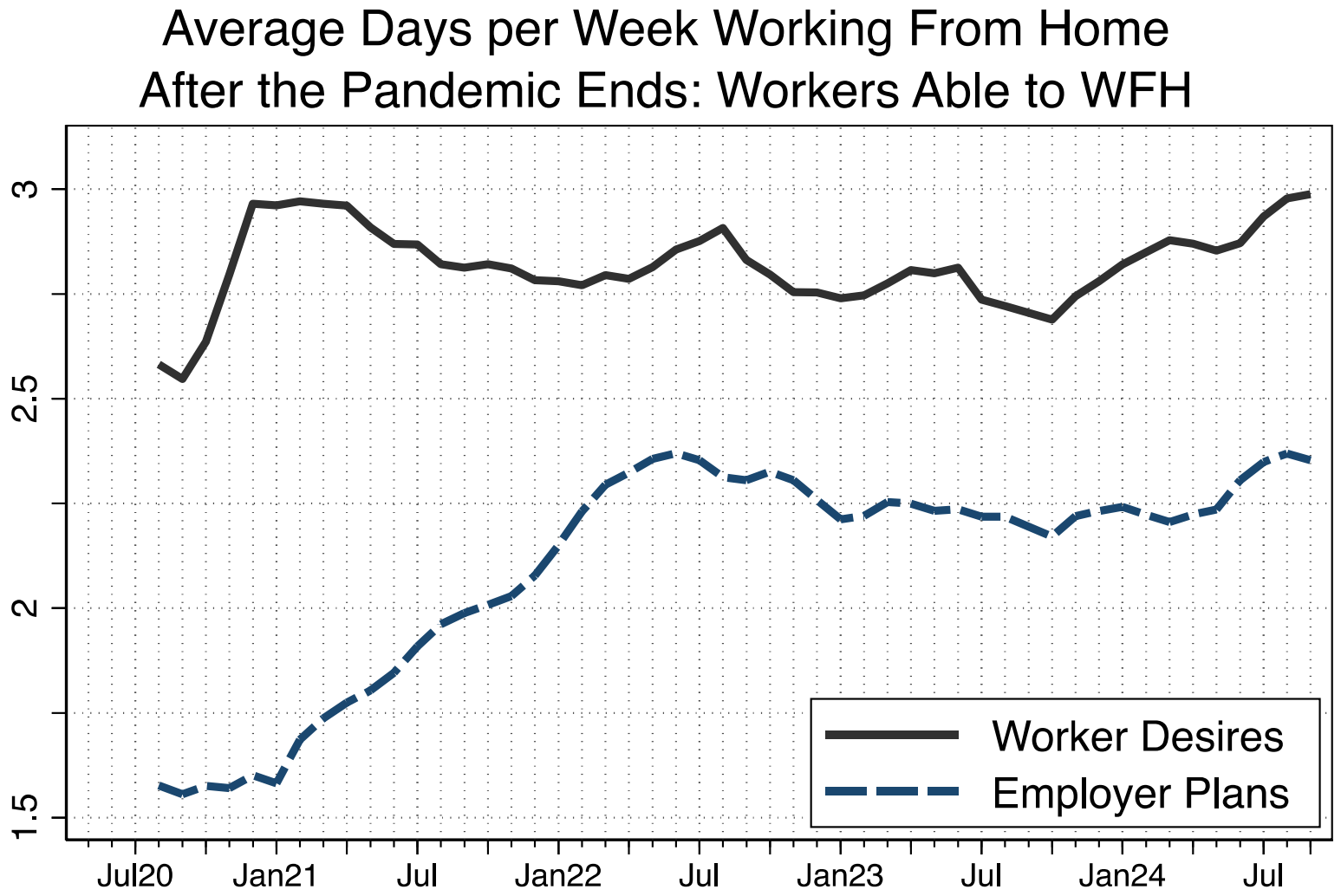
Responses to the question:

- ***Looking one year ahead,*** *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 September 2024. 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. We impute September 2023 data as the average between August and October due to data quality issues.

N = 240,243 (all respondents) and 171,124 (able to work from home)

The Gap Between How Much Employees Want to Work from Home and Employer Plans Fluctuates Near 0.6 Days



Sample: Workers able to work from home

Responses to the questions:

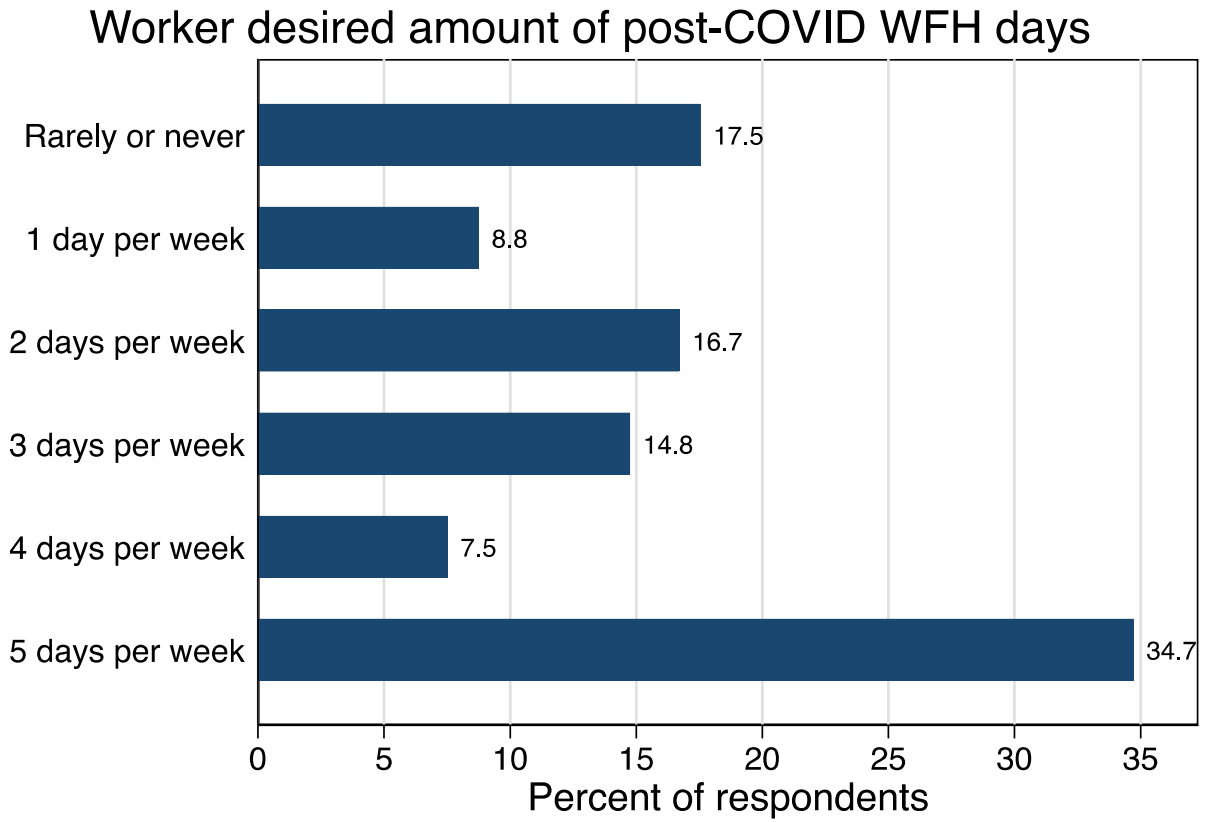
- **Looking one year ahead,** *how often would you like to have full paid days at home?*
- **Looking one year ahead,** *how often* **is your employer planning** *for you to work full days at home?*

Sample: Data are from all SWAA waves, covering August 2020 to September 2024. 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. We impute September 2023 data as the average between August and October due to data quality issues.

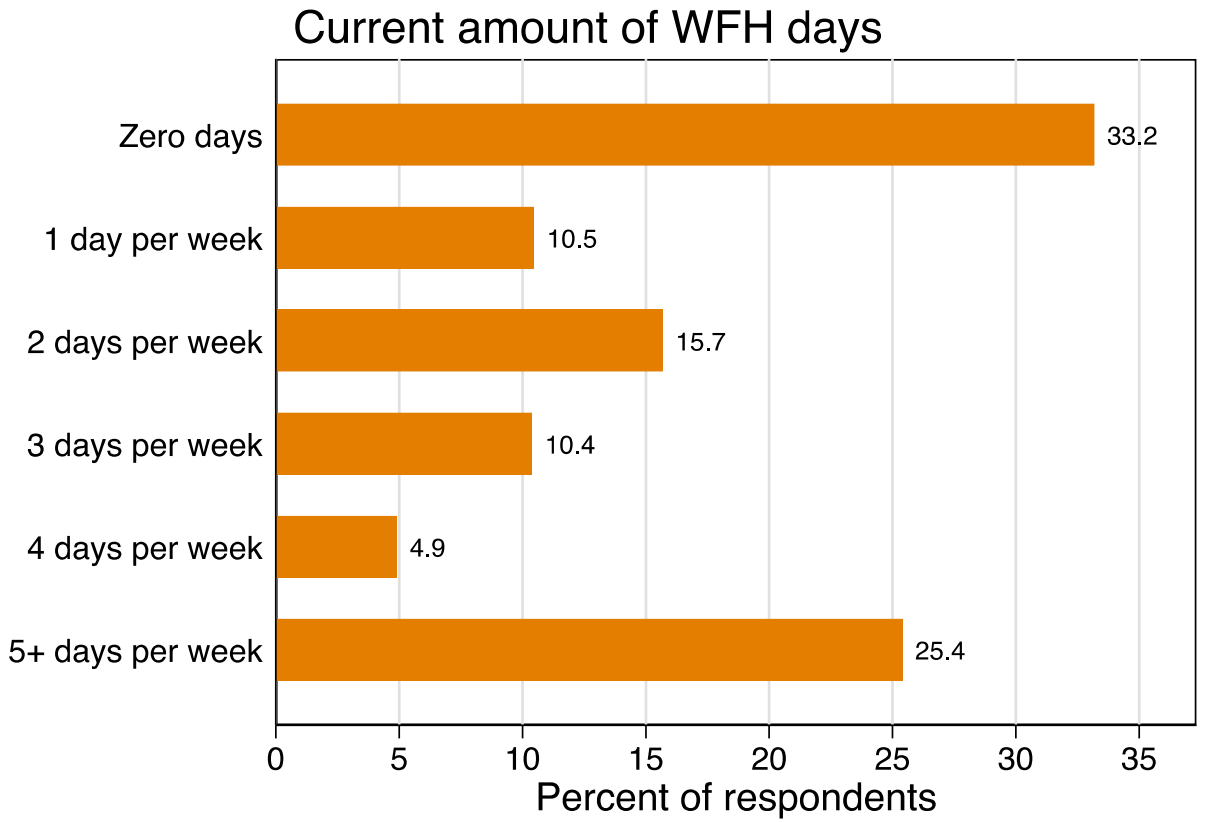
N = 171,124 (employer plans, able to work from home)

N = 184,420 (worker desires, able to work from home)

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



Sample: Full-time wage and salary employees who are able to WFH. N = 7428

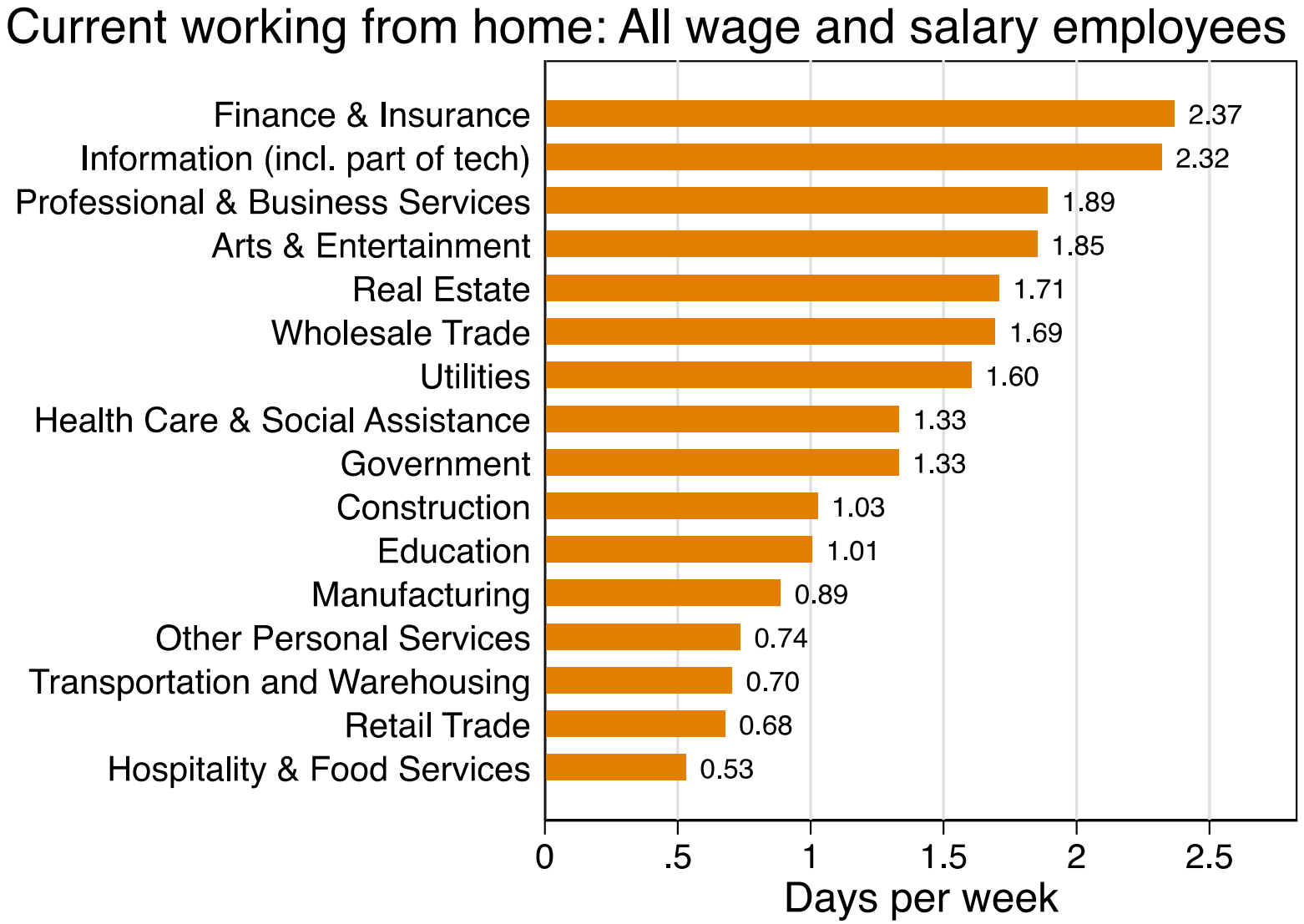


Sample: Full-time wage and salary employees who are able to WFH. N = 7094

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 June to September 2024 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 a prior year to match Current Population Survey on age, sex, education, and earnings.

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



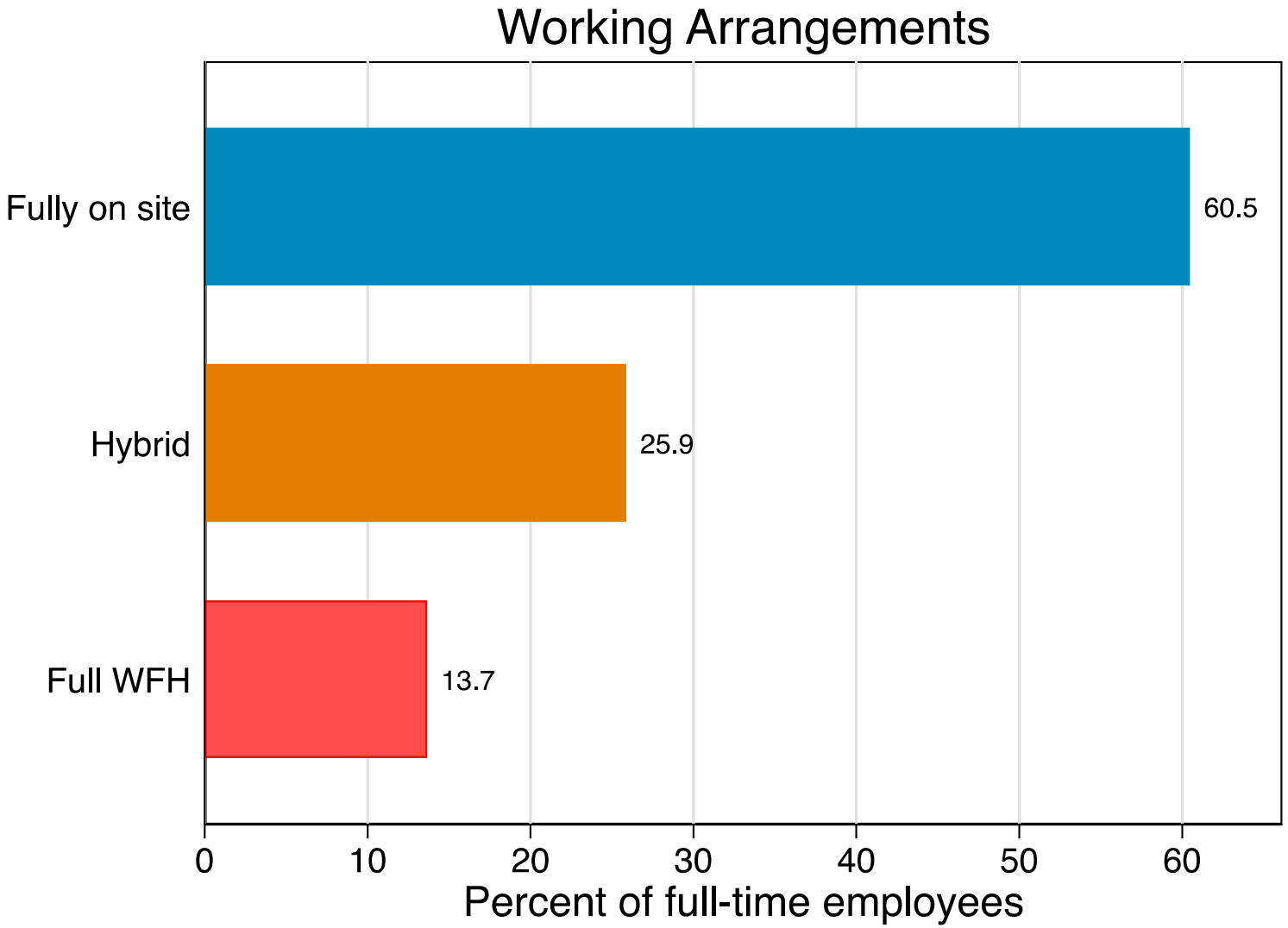
Responses to the question:

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

Sample: Data are from the April to September 2024 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 = 20,950

By Mid-2024: 12% of Full-Time Employees Were Fully Remote, 61% Were Full-Time on Site, and 27% Were in a Hybrid Arrangement



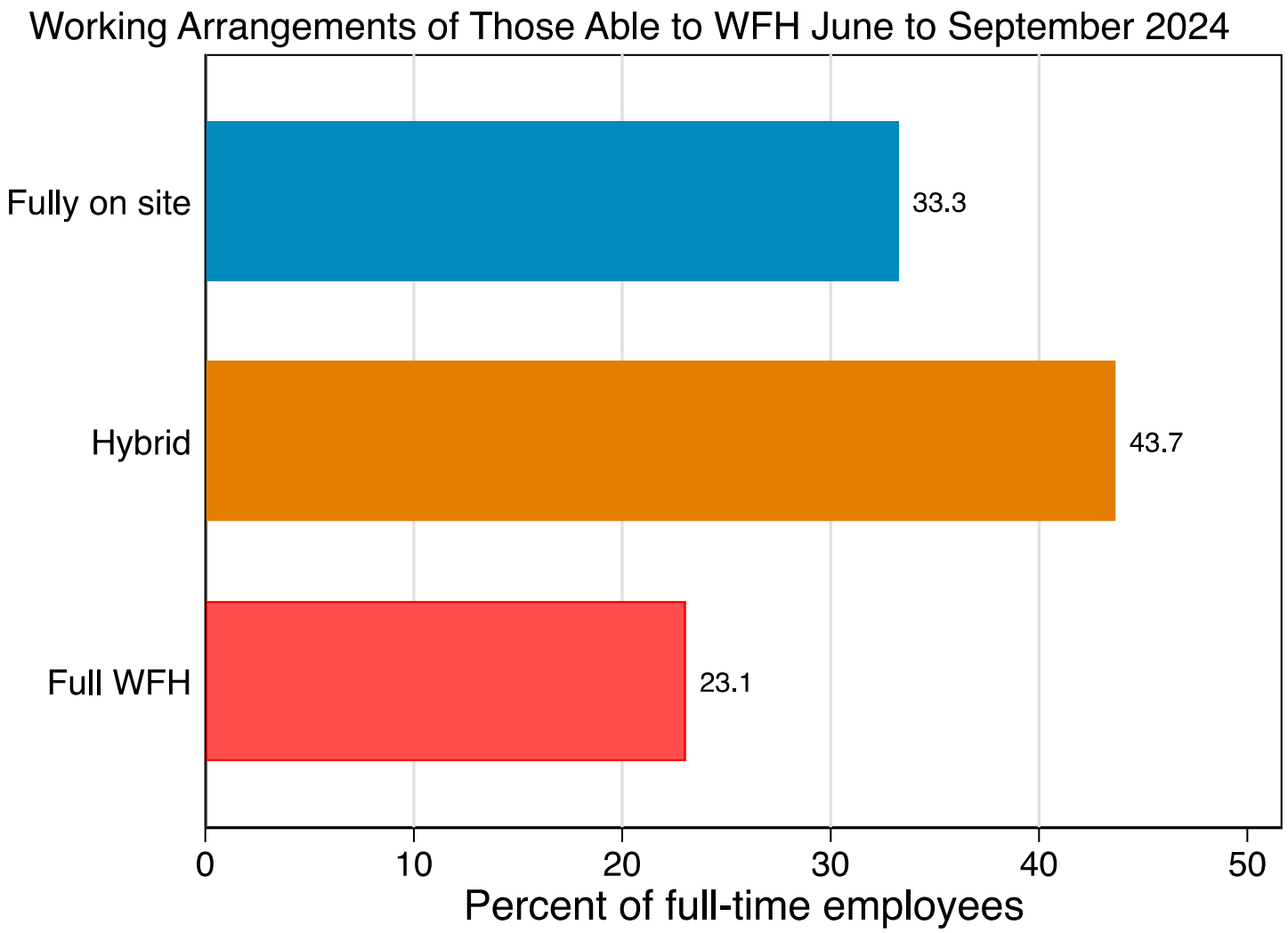
Source: Responses to the questions:

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

Notes: 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 busines premises and some days at home; or iiii) worked all all days at home during the survey's reference week. Then we show the percentage for each group. The sample covers the June to September 2024 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 = 12,461

For Employees that Can Work from Home, the Most Common Practice is Hybrid, with Fully On Site Close Behind



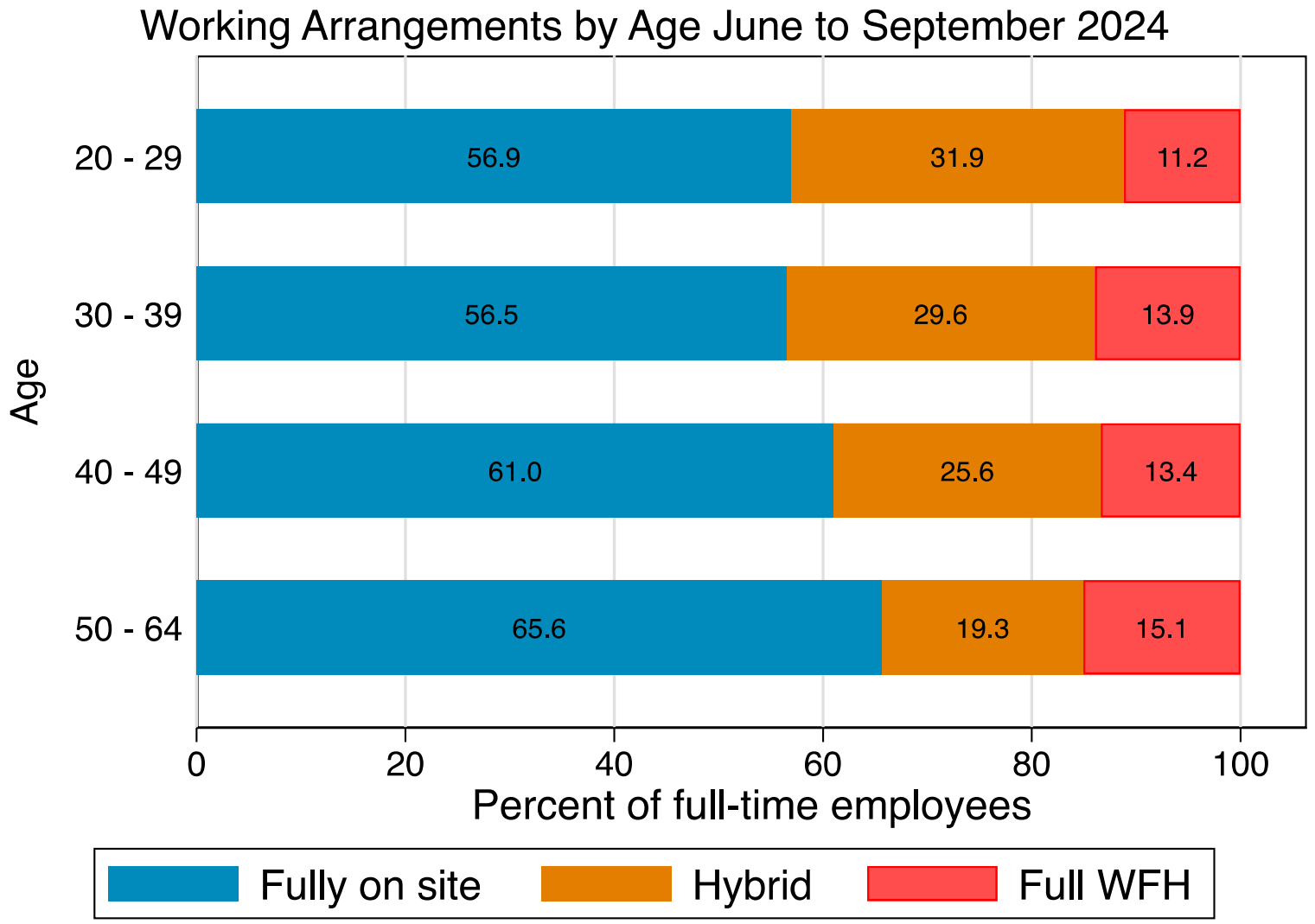
Source: Responses to the questions:

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

Notes: 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 busines premises and some days at home; or iiii) 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 June to September 2024 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 = 8,154

Workers In Their 50s and 60s Are Fully On Site and Fully Remote More Often Than Younger Workers



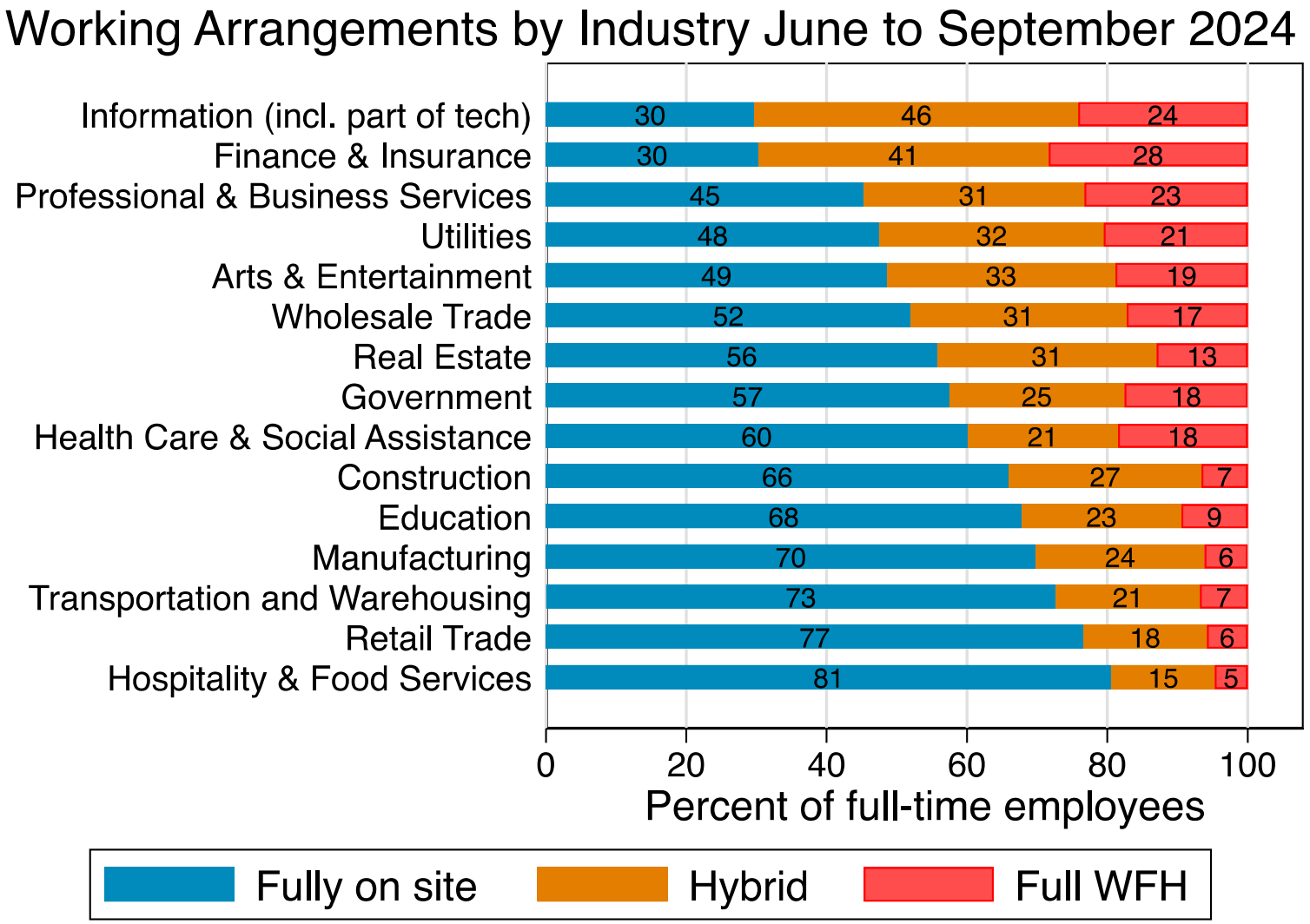
Source: Responses to the questions:

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

Notes: For each age group, 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 busines premises and some days at home; or iiii) worked all all days at home during the survey's reference week. Then we show the percentage for each group. The sample covers the June to September 2024 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 = 12,461

Information, Finance & Insurance, and Prof. & Business Services Have The Largest Share of Hybrid and Remote Workers



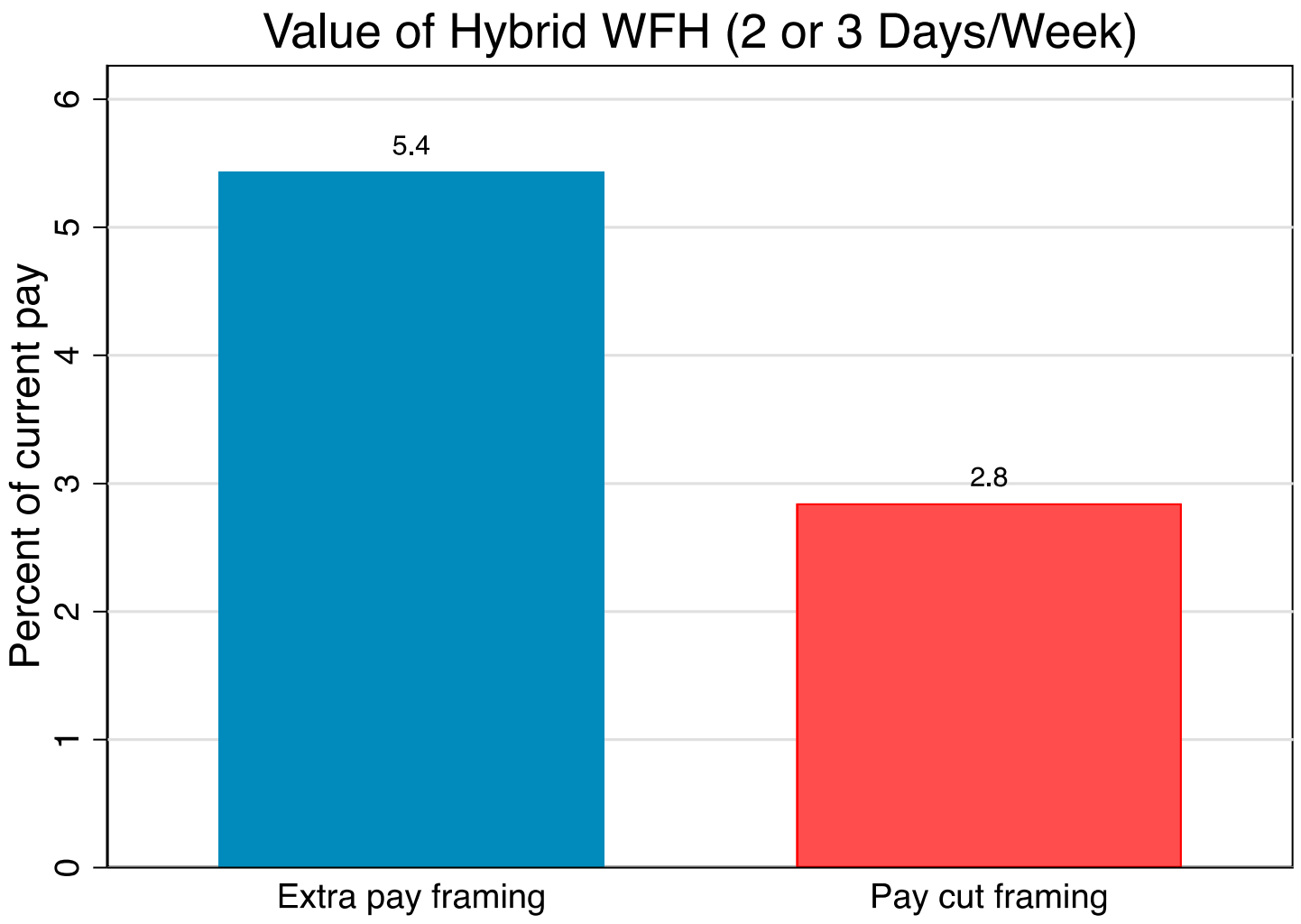
Source: Responses to the questions:

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

Notes: For each industry group, 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 busines premises and some days at home; or iiii) worked all all days at home during the survey's reference week. Then we show the percentage for each group. The sample covers the June to September 2024 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. We exclude agriculture, construction, mining, and other personal services, the latter two due to insufficient observations.

N = 12,181

Valuation of Hybrid WFH Depends On Whether We Ask Respondents to Compare it to A Pay Cut or Pay Raise



Respondents first get a qualitative question:

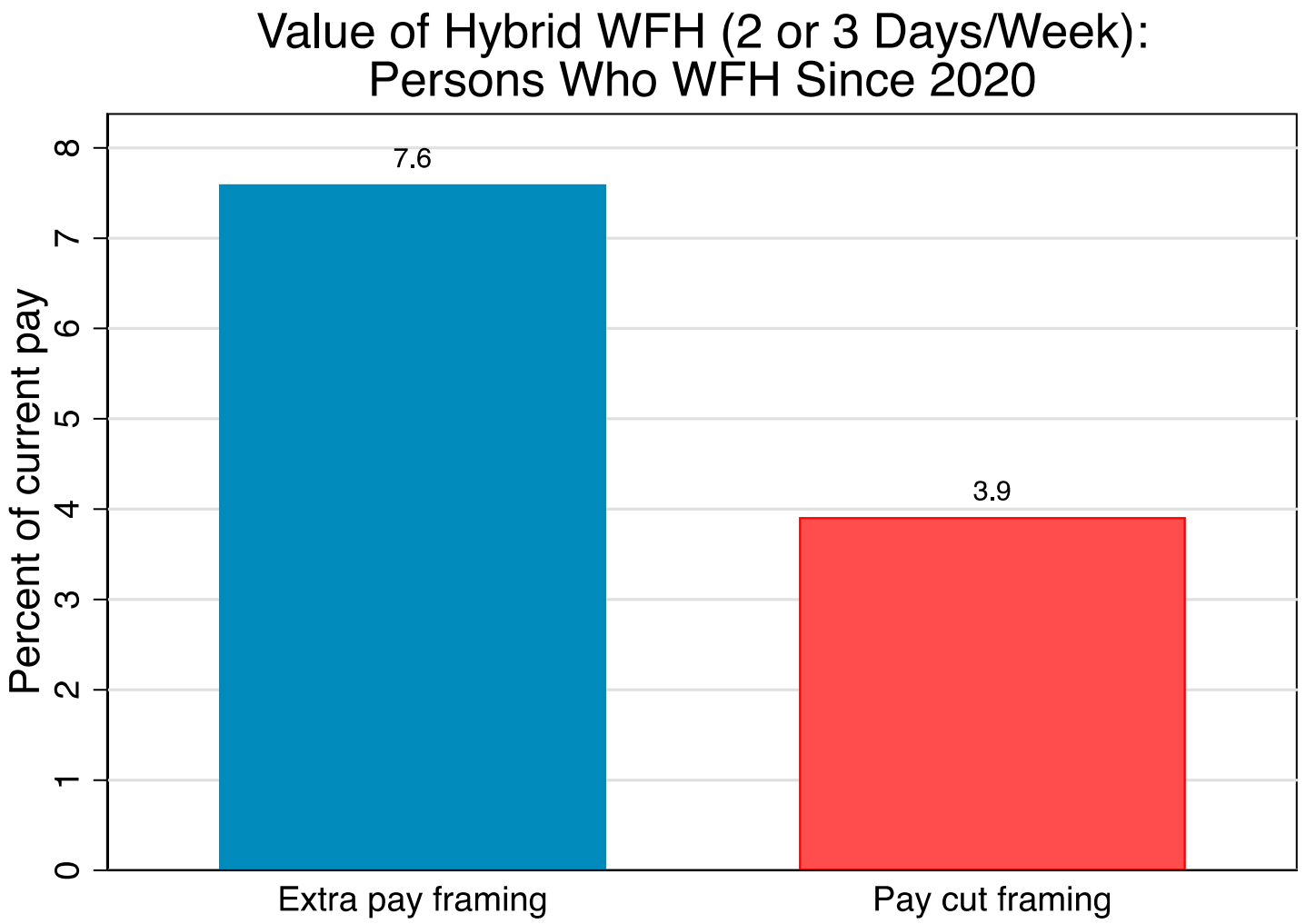
- *How would you feel about* working from home ***2 or 3 days a week****, compared to* working at your employer's site ***every workday****?*
  - *Positively, I would like to…*
  - *Neutral*
  - *Negatively, I would* ***not*** *like to…*

A quantitative follow-up asks them to value their preference as equivalent to a "pay cut" or "extra pay." For example, the follow-up to "Positively…" is one of:

- *How big a* ***pay cut*** *would you accept to* work from home ***2 or 3 days a week*** *(rather than* working at your employer's site ***every workday****)?*
- *How much* ***extra pay*** *would you need to willingly* work at your employer's site ***every workday*** *(rather than* working from home ***2 or 3 days a week****)?*

Notes: We use the quantative responses to the second question to compute the average value of hybrid work form home (compared to fully in-person work), separately for respondents who received the "pay cut" or "extra pay" framing. We interpret responses of those who view hybrid "Negatively…" as a negative value. We interpret "Neutral" views as a value of zero for hybrid. Data are from the July and September 2024 SWAA, reweighted to match the 2010-2019 CPS by age-sex-education-earnings cells. **N = 9,457**

With Higher Valuations of Hybrid WFH Among Persons Who Have WFH At Some Point Since 2020



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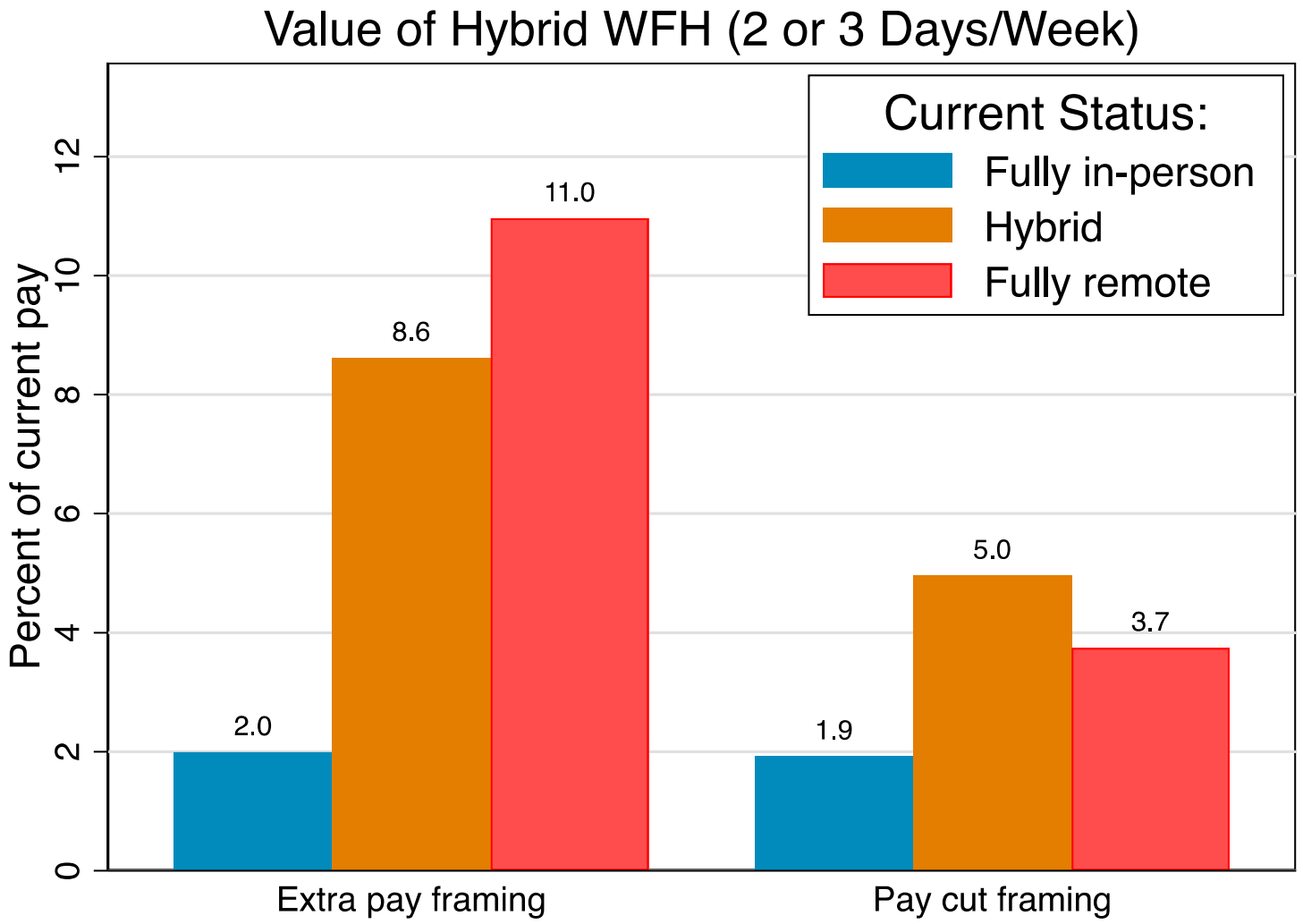
Hybrid is More Valuable When Currently WFH



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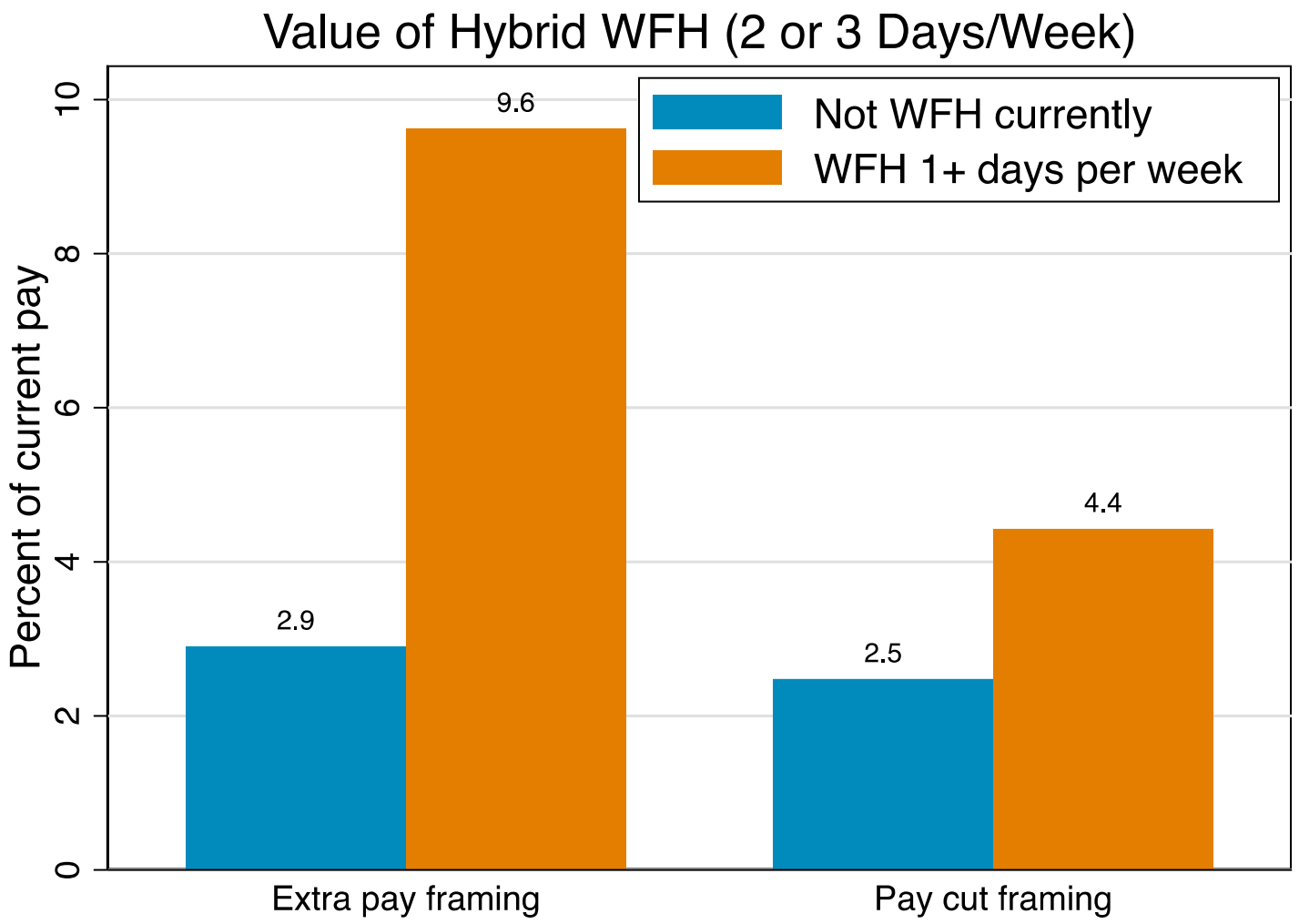
Among Those Who Have WFH Since 2020, Hybrid is Especially Valuable When They Still WFH 1+ Days Per Week



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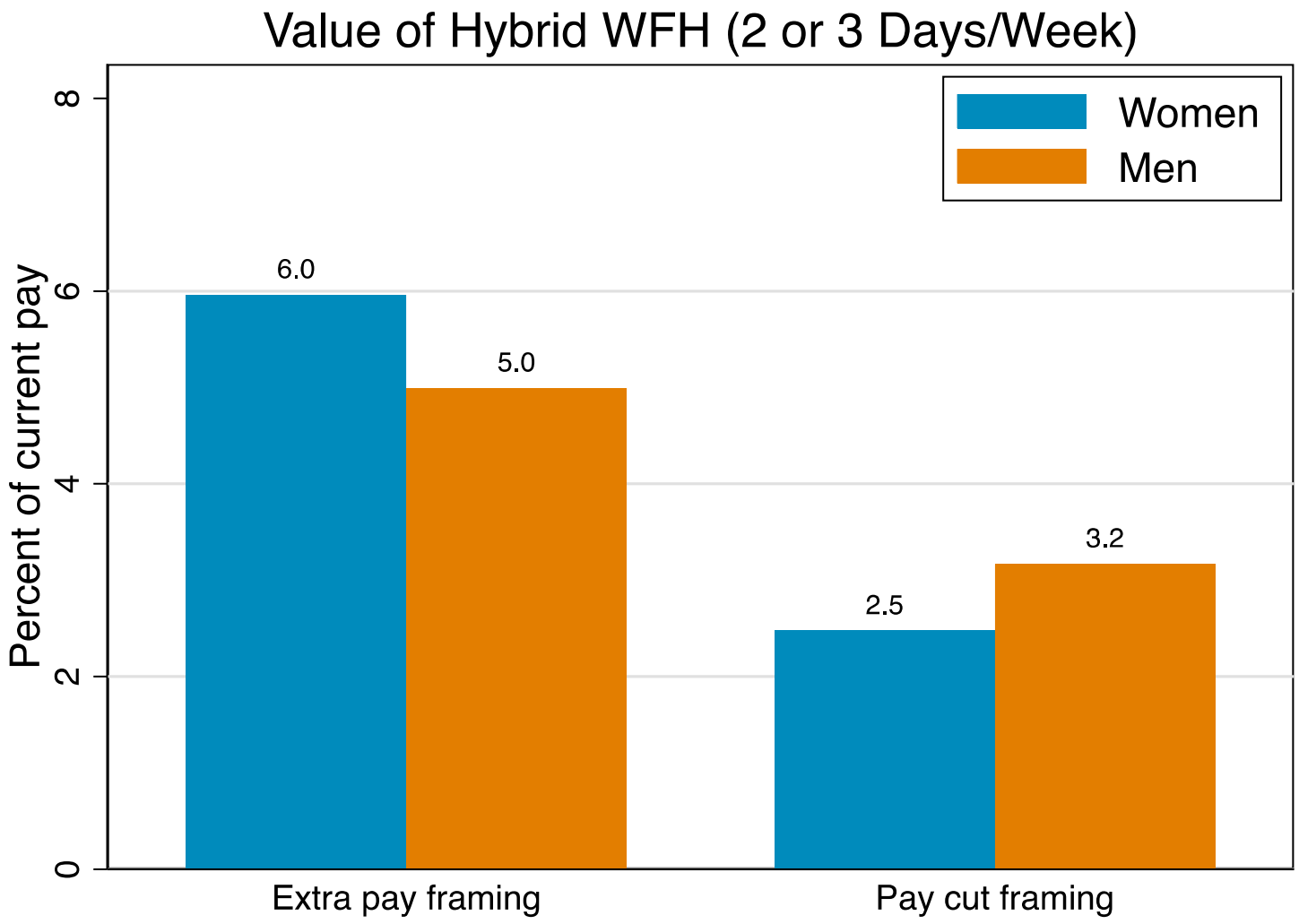
Women Value WFH More When Framed as a Pay Raise, Men Value it More When Framed as A Pay Cut



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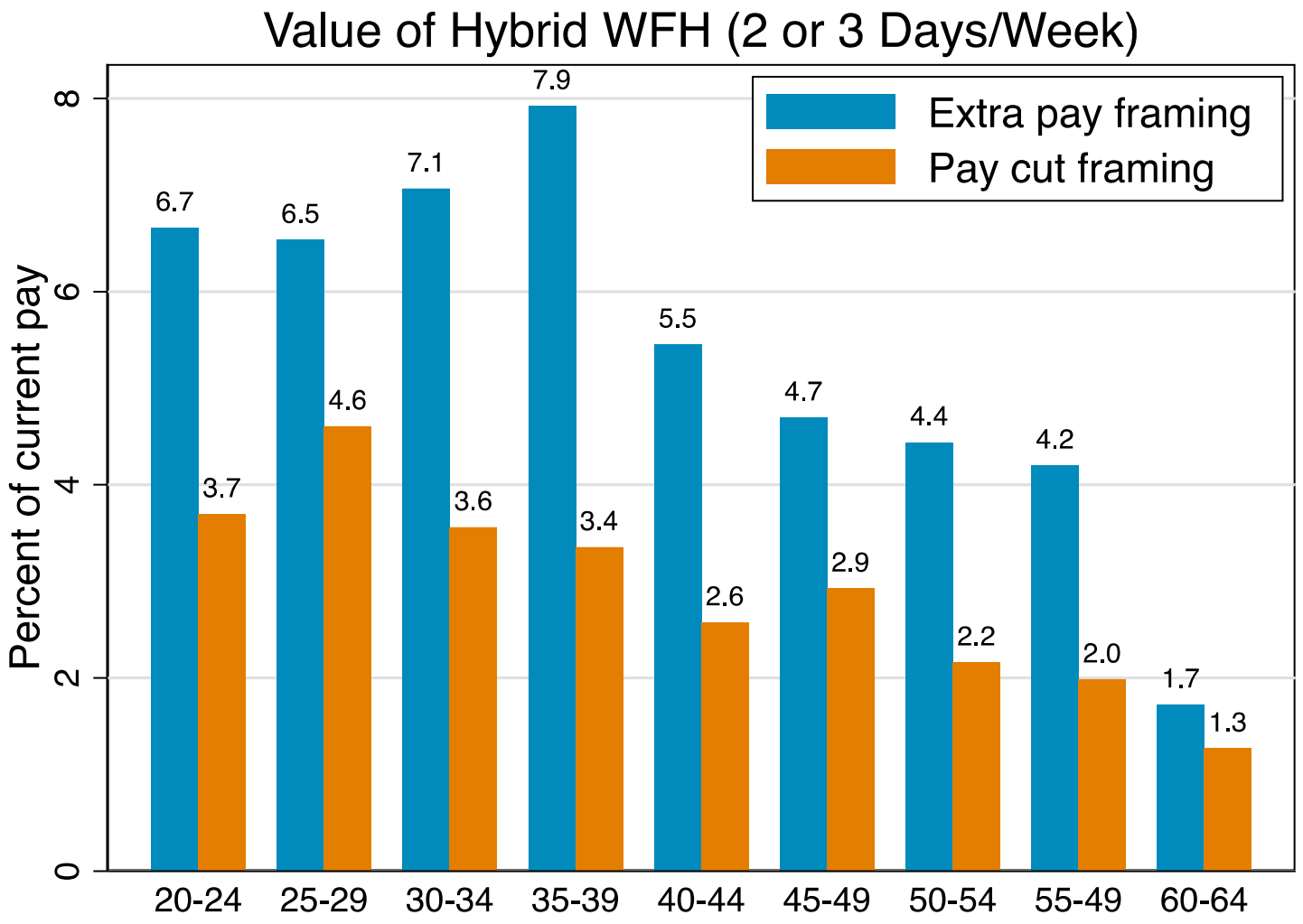
Younger Workers Value WFH More Than Older Ones



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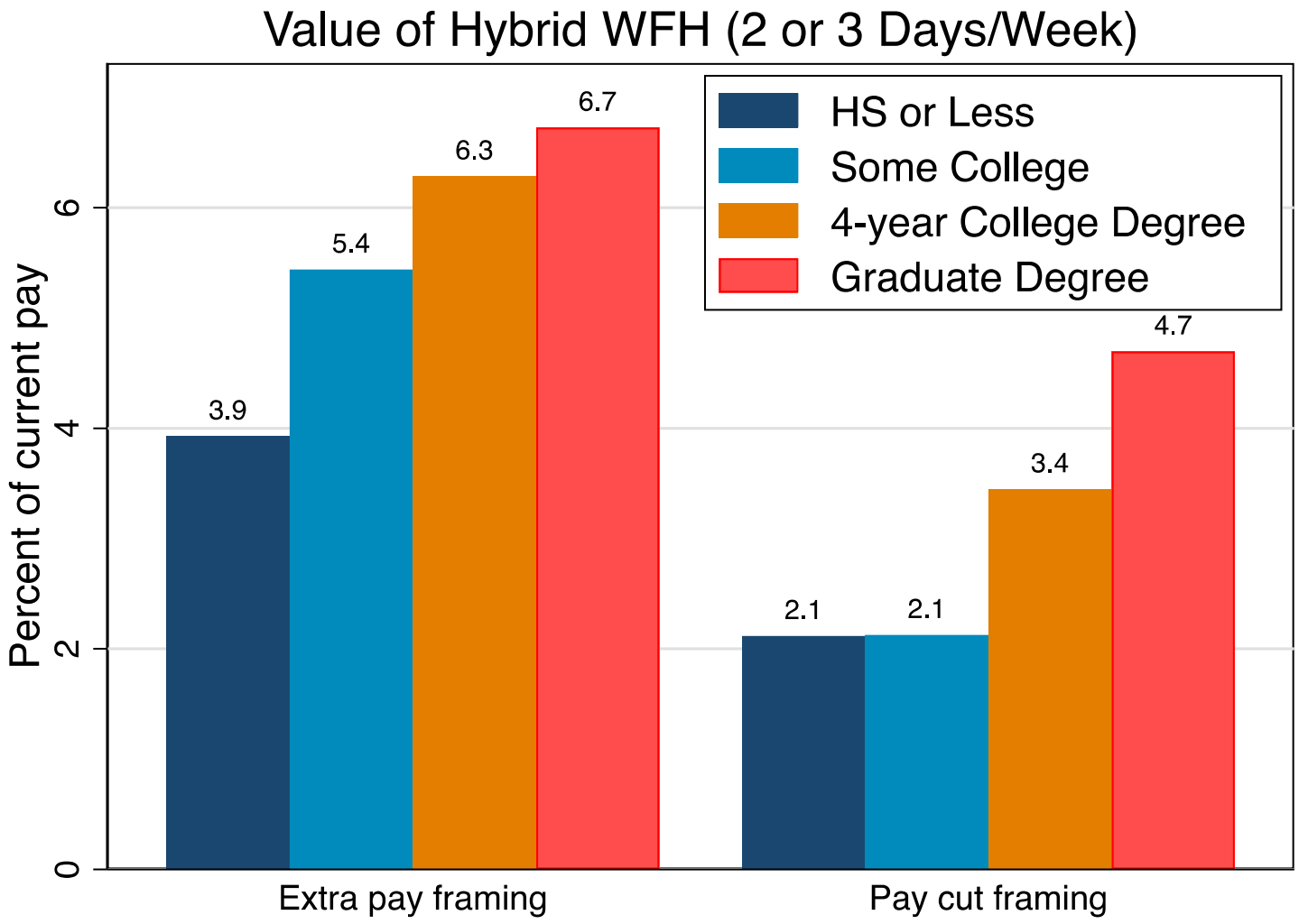
Workers With More Education Value WFH More



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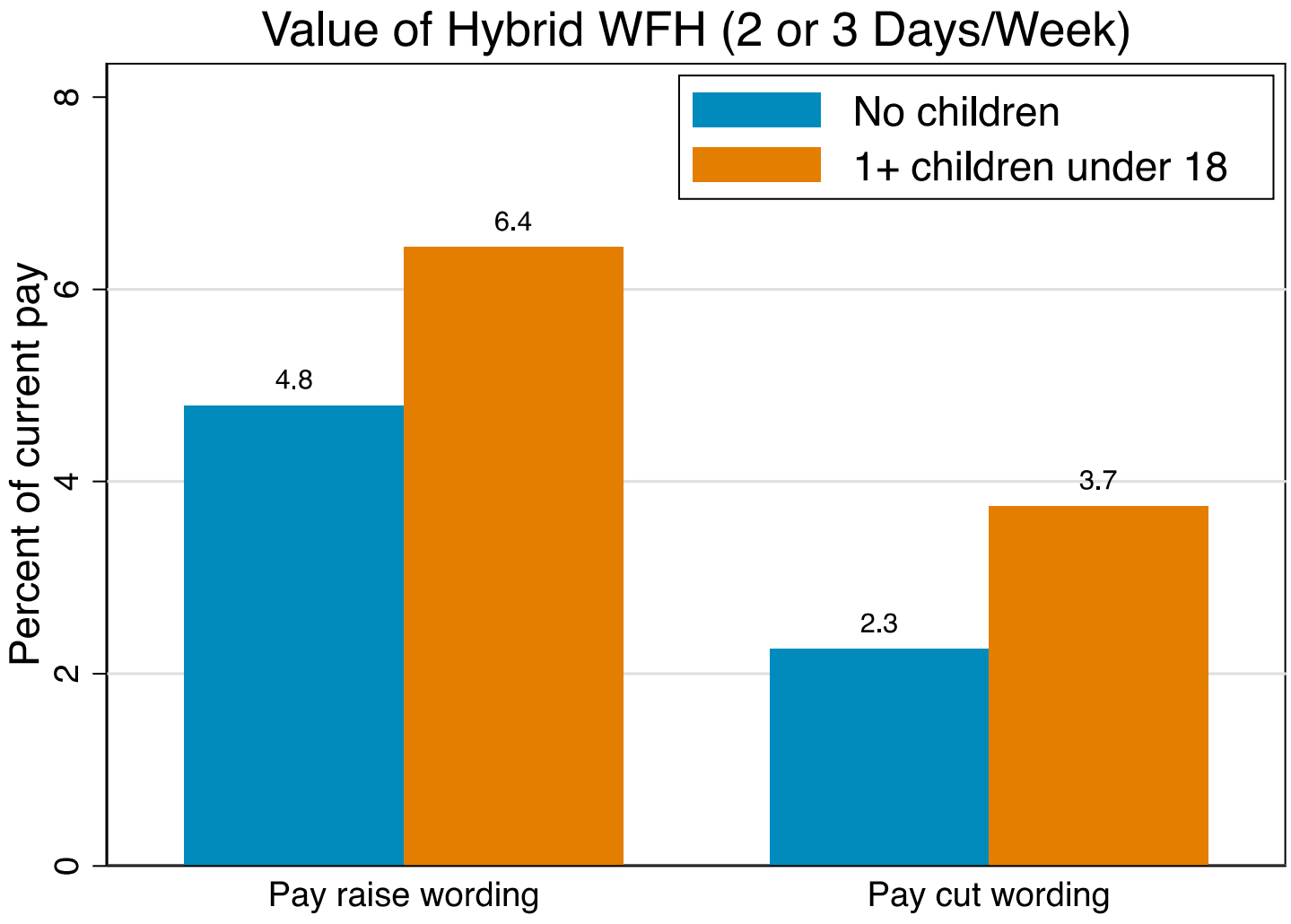
Workers Who Live With Children Under 18 Value Hybrid More Than Those Who Don't



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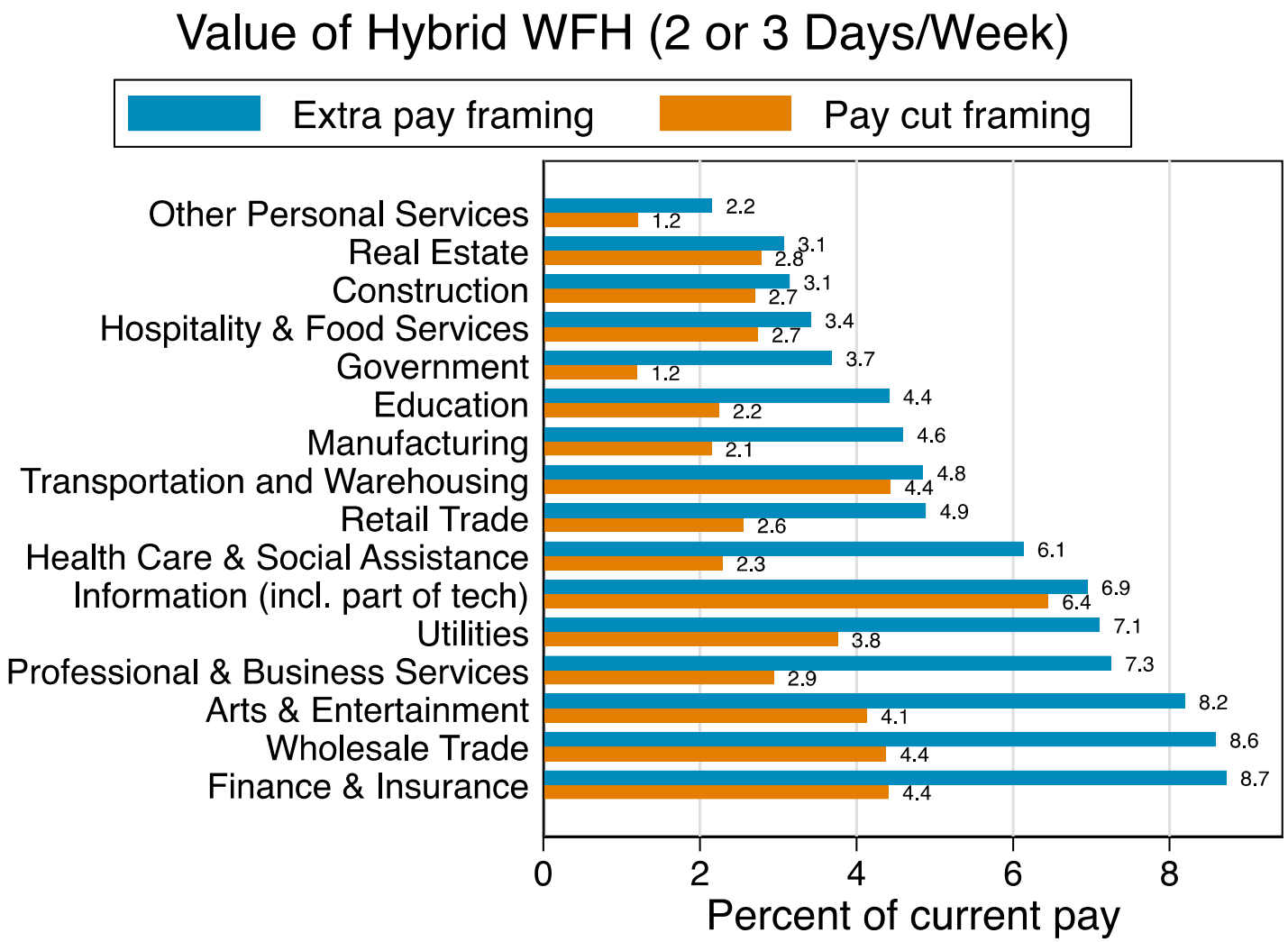
  - *Positively, I would like to…*
  - *Neutral*
  - *Negatively, I would* ***not*** *like to…*

A quantitative follow-up asks them to value their preference as equivalent to a "pay cut" or "extra pay." For example, the follow-up to "Positively…" is one of:

- *How big a* ***pay cut*** *would you accept to* work from home ***2 or 3 days a week*** *(rather than* working at your employer's site ***every workday****)?*
- *How much* ***extra pay*** *would you need to willingly* work at your employer's site ***every workday*** *(rather than* working from home ***2 or 3 days a week****)?*

Notes: We use the quantative responses to the second question to compute the average value of hybrid work form home (compared to fully in-person work), separately for respondents who received the "pay cut" or "extra pay" framing. We interpret responses of those who view hybrid "Negatively…" as a negative value. We interpret "Neutral" views as a value of zero for hybrid. Data are from the July and September 2024 SWAA, reweighted to match the 2010-2019 CPS by age-sex-education-earnings cells. **N = 9,457**

Workers In Industries Offering More WFH Tend To Value It More, But the Correlation Drops When We Ask Them To Equate it to a Pay Cut



Respondents first get a qualitative question:

- *How would you feel about* working from home ***2 or 3 days a week****, compared to* working at your employer's site ***every workday****?*
  - *Positively, I would like to…*
  - *Neutral*
  - *Negatively, I would* ***not*** *like to…*

A quantitative follow-up asks them to value their preference as equivalent to a "pay cut" or "extra pay." For example, the follow-up to "Positively…" is one of:

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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.