

02 | Working From Home Around the World

This is a continuation of the Global Report: Changing Expectations and the Future of Work

The experience of working from home has varied dramatically based on many factors, including geography, industry, job type and job level. The quality of people's home work space, their caregiving responsibilities, their ability to block out distractions, their individual work styles and their perspective in general have all impacted how they've felt and performed. People who live and work in urban areas, usually with smaller or even shared living spaces, have had different experiences from people in suburban or rural areas.

Overall, in every country, people who were dissatisfied working from home struggled more than others. Organizations can learn from what researchers have discovered about working from home to improve the work experience moving forward.

The Key Benefits and Challenges of Working From Home

People's experience working from home is deeply personal and as diverse as individuals themselves. How people perceive the benefits and challenges of working from home varies significantly, yet the data reveals some consistent issues around the world and patterns that emerge in different countries.

No Commute: Benefit

Not commuting to the office is almost universally the main thing people like about working from home.

Eight out of 10 countries rank the lack of a commute as the top benefit, and it was a close second in China.

Only India ranked it significantly lower. One participant summarized the sentiment of many by saying, “I’m not wasting 45 minutes in a commute. I can go for a run in the morning and then quickly get right into work.” Ironically, the thing most people like the best about working from home is not related to their company’s workplace, but simply to how long or difficult it is to get there.

The notion that commuting is essentially wasted time is important for organizations to understand as they consider their long-term real estate strategies and flexible work policies. It is equally important to note that some degree of commute can be helpful as it can act as a temporal threshold between work life and home life.

Isolation: Challenge

Everyone everywhere struggles with a feeling of isolation while working from home.

In fact, isolation ranks the highest among participants in all 10 countries as the leading factor that worsened during mandatory work-from-home orders.

It is especially high in Australia, Mexico and Spain — countries that rate isolation twice as worse than any other factors.

Despite all the efficiency-based arguments for embracing a heavy work-from-home strategy, people are social animals and do not thrive when they feel alone. Loneliness was a growing issue before the pandemic, and this has only accelerated over time. Virtual meetings can’t replicate the same level of connection people feel when they are together.

Engagement and Productivity: Benefit and Challenge

Engagement and productivity are other key issues, but they are not as straightforward. In seven of the 10 countries studied, engagement is among the top five things that deteriorate while working from home. Productivity rates in the top five as well for every country (with the exception of Mexico which rates it sixth).

Yet, participants also rank their ability to focus and be productive at home in the top five things that have improved (with the exception of Canada, which ranks it sixth). Can both be true? Can employees find working from home both more and less productive?

The divided responses reinforce the notion that working from home is a different experience for everyone and productivity levels are impacted by how people feel. Steelcase researchers found a distinct correlation between people's satisfaction with their work-from-home situation and their engagement, as well as productivity. Both engagement and productivity drop in all countries when people aren't satisfied, and it usually declines further when people have to work from home more frequently.

All 10 countries report drops in engagement and productivity when people are dissatisfied with their work-from-home experience. In most cases, engagement and productivity drop more significantly when work-from-home frequency increases.

The level of dissatisfaction with working from home may explain the seemingly contradictory messages that the experience is both better and worse for engagement and productivity. On average, 41% of workers globally are not satisfied with their situation, which means they are more likely to experience drops in both areas.

There are a variety of factors that influence whether people feel productive and satisfied working from home. For example, Steelcase researchers find that, when working from home, common office furnishings, specifically an ergonomic chair, actually help increase productivity — but only 24% of individual contributors in the US have one. This look at the role of furniture and productivity suggests that physical discomfort can be a distraction, taking its toll on people's ability to focus. The bottom line: it is important people have a place that is distraction-free, where they can focus, regardless of whether they are at home or the office.

Speed of decision-making, clarity around responsibilities, and work-life balance also suffer as people work from home. All of these are interconnected with the issues of engagement and productivity. If employees feel decisions happen more slowly, are unclear about their work, and have to work longer to accomplish the same amount of work or less, the results can be reduced productivity and less commitment to the organization.

Benefits and Challenges of Working From Home by Country

People told us the three things they liked most and what got significantly or moderately worse while working from home.

To view all country data use arrows below.

United States

Benefit

1. No Commute
2. Ability to focus + be productive
3. No office distractions

Challenge

1. Sense of isolation
2. Engagement
3. Speed of decisions

United Kingdom

Benefit

1. No Commute
2. No office distractions
3. Work-life balance

Challenge

1. Sense of isolation
2. Engagement
3. Speed of decisions

Spain

Benefit

1. No Commute
2. Increased Flexibility
3. No Office Distractions

Challenge

1. Sense of Isolation
2. Work-life Balance
3. Innovation

Mexico

Benefit

1. No Commute
2. Ability to Work in a Range of Settings
3. Family Time

Challenge

1. Sense of Isolation
2. Work-life Balance
3. Innovation

India

Benefit

1. More Time for Health and Fitness
2. Better Work-life Balance

Challenge

1. Sense of Isolation
2. Speed of Decisions

3. Ability to Focus + Be Productive

3. Work-life Balance

Germany

Benefit

1. No Commute
2. No Office Distractions
3. Ability to Focus + Be Productive

Challenge

1. Sense of Isolation
2. Speed of Decisions
3. Productivity

France

Benefit

1. No Commute
2. Ability to Focus + Be Productive
3. Increased Flexibility

Challenge

1. Sense of Isolation
2. Productivity
3. Clarity of Responsibilities

China

Benefit

1. Ability to Work in a Range of Settings
2. No Commute
3. Ability to Focus + Be Productive

Challenge

1. Sense of Isolation
2. Speed of Decisions
3. Productivity

Canada

Benefit

1. No Commute
2. No office distractions
3. Better Work-life Balance

Challenge

1. Sense of Isolation
2. Clarity of Responsibilities
3. Engagement

Australia

Benefit

1. No Commute
2. No office distractions
3. Ability to focus + be productive

Challenge

1. Sense of Isolation
2. Productivity
3. Engagement

Drops in Engagement and Productivity for People Dissatisfied Working From Home

When people are dissatisfied with their work-from-home experience and have to do it more often, they report drops in performance.

Five Patterns of Work-From-Home Experiences

To better understand the nuances of how people feel about working from home, Steelcase researchers augmented quantitative data by interviewing people in North America and Europe for deeper insights. They found the experiences people described fell into five patterns of behavior and attitudes.

It's important to note that it's possible for people to associate themselves with more than one of the patterns. They are meant to be extreme categories that can help us understand the different experiences people have had and what their expectations may be when they return to the workplace.

Overworked Caretaker

Home office is a nonstop flow of competing demands

This person is torn between meeting work responsibilities and managing family needs. Their long, jam-packed day is chopped between meetings, focus work, homeschooling and domestic chores. Exhaustion and guilt are piling up. They take comfort in finally being allowed to show they are parents and not worry if their kids are heard on a call. They miss the office for the opportunity to leave home responsibilities behind and have control over their attention. But they appreciate the flexibility to work from home as needed to more easily manage between their family and work responsibilities.

Frustrated Creative Networker

Home office is a suspension from normal life and work

These individuals are conflicted about returning to the office. They spend most of their day co-creating, coaching, persuading and connecting the dots — work done much better in the office, especially with larger groups. But although they desire the benefits of the office, they don't think it's safe to return. They have quickly adapted the use of digital tools, but they

Relieved Self-Preservationist

Home office is the only place I am safe

This person's main concern is not COVID; it's their psychological safety. They feel their company is creating a hostile work environment and working from home has been a welcome respite from an organization they feel does not appreciate them. They're less anxious and more productive, able to focus on work, rather than managing relationships. Working from home gives them a more human experience that allows them to work in a space that is their own.

Autonomy Seeker

Home office is freedom

Thrilled to work at their own rhythm, without someone constantly looking over their shoulder, this person feels just as productive at home as before, if not more. They feel a greater sense of wellbeing at home, where they can look out the window, sit in different postures, cook healthy meals and weave in activities that help them recharge and relax, such as hanging out with their pet. They especially enjoy the level of control they have in designing their own work experience to curate a schedule that braids together life events and work events.

Isolated Zoomer

Home office is a lonely cage

This person lives alone without any self-imposed boundaries to keep to a healthy work schedule. They'll return to the office when they trust their employer has taken necessary precautions. They value the office because it offers a way to separate work and life. Days are spent on back-to-back Zoom calls, and despite constant interaction, they feel disconnected. They miss daily social interactions with their colleagues — a major reason they come to the office. Relationships and their support system at work make it easier to navigate challenges.

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