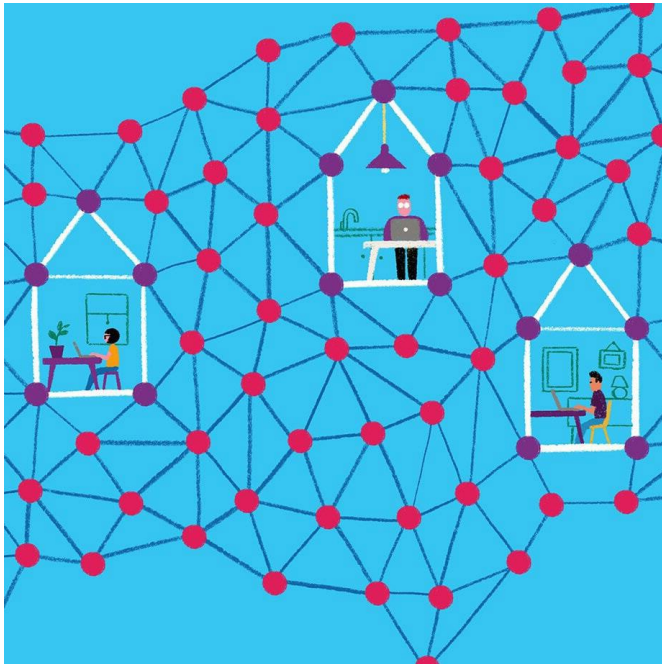


Report: Remote work in the age of Covid-19



A nationwide survey of knowledge workers reveals how companies and employees are responding to a remote work surge



The World Health Organization officially declared Covid-19 a pandemic on March 11. Within a few weeks, an estimated 16 million U.S. knowledge workers had switched to working remotely to flatten the curve of the health crisis, according to a new survey by Slack.

This amounts to nearly one-quarter of all knowledge workers in the U.S., and that proportion has climbed even higher as more states have urged citizens to stay home.

A **knowledge worker** is anyone who holds an office position and/or works with data, analyzes information or thinks creatively in a typical workweek.

Those who've transitioned to remote work during the Covid-19 outbreak are among the lucky ones. Millions of Americans have lost their jobs, and others have jobs that put them and their families at risk. But even for those fortunate enough to continue working from the relative safety of their homes, remote work poses new challenges.

We wanted to hear from workers themselves about how they're managing the transition. So we surveyed 2,877

Key takeaways on remote work during the Covid-19 pandemic

- 1. The remote work wave:** An estimated 16 million U.S. knowledge workers started working remotely due to Covid-19 as of March 27; that number is likely much higher now.
- 2. Experience matters for remote work:** Productivity and communication take a hit when employees are new to working from home. The good news is that experience helps. Those who've been working from home for over a month have found tools and strategies to boost collaboration and work satisfaction.
- 3. The transition can strain professional connections:** Nearly half of newly remote workers say that working from home has negatively affected their sense of belonging. But experienced remote workers show us that connectedness can improve over time.
- 4. Collaboration tools can help:** Slack users reported a greater sense of belonging when working remotely, as compared with non-Slack users. They're also more productive and less likely to deal with slow and inefficient communication.

knowledge workers across all 50 states to understand how they're adapting, what they find challenging and what's working well. We compared the experiences of veteran remote workers with newly remote workers to determine which practices and tools might help newcomers adapt.

Here's what we found:

- **Newly remote knowledge workers are struggling to adapt to their new workplace reality.** Collaboration can be especially problematic for those who've been working remotely for less than a month. They're more likely to report slow, inefficient processes and communication, which can hinder operational speed and productivity. These challenges often ladder up to bigger issues that negatively affect workers' sense of belonging and overall work satisfaction.
- **Collaboration tools can be part of the solution.** Remote workers who use Slack are more likely than non-Slack users to report that their productivity actually improved when working from home. They're also less likely to experience feelings of loneliness, isolation and disconnection while working remotely.

UNDERSTANDING THE REMOTE WORK SURGE

Of the nearly 3,000 knowledge workers we surveyed between March 23-27, 45% reported working remotely. Of these, more than half (66%) say they're doing so because of Covid-19 concerns, while 27% say they "normally" work from home.

Remote work snapshot

- 45% of knowledge workers surveyed work remotely
- 66% of remote workers are doing so because of Covid-19 concerns
- 27% of remote workers say they "normally" work from home

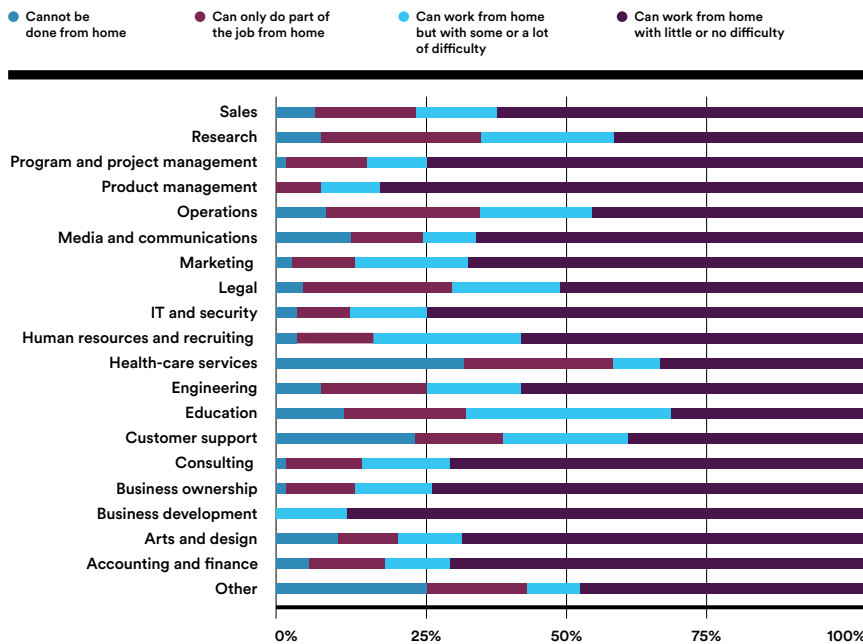
While the number of remote workers is certainly high, 55% of those surveyed are still going into work. There are several possible explanations. For one, stay-at-home orders have rolled out piecemeal across the country. As of March 26, **21 states had instituted stay-at-home directives**. That number jumped to 30 by March 30, and 42 as of April 7. The number of remote workers has undoubtedly grown as more states have urged people to stay home.

It's also important to understand that working from home is simply not an option for many Americans. Roughly 11% of knowledge workers surveyed say their jobs cannot be done remotely. While nearly half (48%) say it would make their jobs more difficult.

As you might expect, this varies widely by sector. The data shows that workers in fields such as health care, research, operations, education and customer support are the most likely to say that it's either impossible or difficult to work from home, while those in business development, product or program management and IT find it much easier to do so.

For some respondents, working from home is difficult or impossible because the work itself requires in-person interactions. This is true for a doctor performing a medical procedure or an accountant completing a physical count of inventory. But for others, technology and tools proved to be the limiting factor. These respondents reported that they didn't have the proper technology setup at home to do their jobs and/or that their company didn't have communication tools to keep everyone connected virtually. While there is little that business leaders can do in the first case, there's a lot they can change in the second.

Suitability of job for remote work by industry



Source: Slack survey of knowledge workers, conducted March 23-27 (n=2,877)

REMOTE WORK BRINGS NEW COMMUNICATION AND COORDINATION CHALLENGES

Workers who can (and are) working from home, find themselves grappling with new challenges. For more than half of those now working from home, it's a new experience that they are still figuring out how to do successfully.

So what exactly makes remote work challenging?

It depends on who you ask. We found it instructive to compare the experiences of those who've worked from home for less than a month, "newly remote workers," with those who've had some experience working remotely, "experienced remote workers." Given the dates of our survey, the vast majority (86%) of newly remote workers say they made the switch because of the coronavirus pandemic.

Defining newly remote and experienced remote workers

Newly remote workers have worked primarily from home for less than one month; they comprise 53% of those now working from home

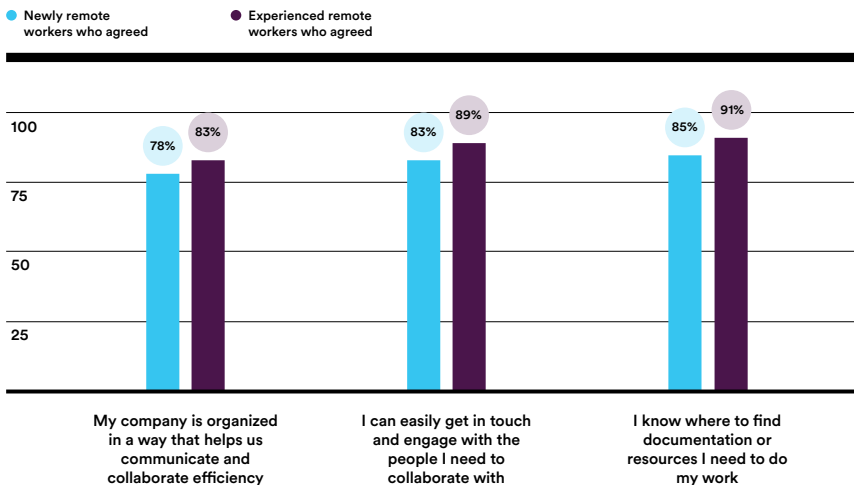
Experienced remote workers have worked from home for more than one month; 47% of those working primarily from home are experienced remote workers

For newly remote workers, communication and coordination can be especially problematic. These workers are more than twice as likely as experienced remote workers to cite "the volume of communications to coordinate with others" as a challenge.

We also see statistically significant differences in how experienced and newly remote workers feel about communicating with others and finding information. Inexperienced remote workers are 5 percentage points less likely than their experienced counterparts to feel that their company is structured in a way to help them communicate and collaborate efficiently. They're also less likely to feel that they can easily get in touch with others and find the information they need to do their jobs.

The data shows us that newly remote workers have some catching up to do when it comes to remote collaboration. This makes sense when you consider that former office workers are accustomed to face-to-face communication and spontaneous conversations that might happen in the elevator or lunchroom. There's also evidence that some forms of **virtual communication, such as video calls, can be more mentally exhausting** than in-person interactions. What's more, their companies might not have the tools and systems in place to facilitate efficient remote communication.

Experienced vs. newly remote workers on the ease of communicating and finding information at work



FOR NEWLY REMOTE EMPLOYEES, WORKPLACE SATISFACTION, CONNECTION AND PRODUCTIVITY CAN BE PROBLEMATIC

During this public health and economic crisis, employers are focused on maintaining continuity and preventing operations from slowing down or, worse, grinding to a halt. The unexpected shift to remote work presents a huge challenge. Many companies are finding it harder to keep teams productive, aligned and engaged.

Three areas stand out as particularly problematic for newly remote teams: productivity, employees' sense of belonging and overall work satisfaction.

Productivity: The data shows us that newly remote workers are struggling to stay productive. Nearly one-third of newly remote workers say that working from home has negatively affected their productivity, compared with only 13% of experienced remote workers. In other words, those new to working from home are twice as likely as experienced remote workers to say that they're now less productive.

It's worth reiterating here that the vast majority of newly remote workers moved to home offices because of Covid-19. Many are juggling family responsibilities and radically new lifestyles with their jobs, so it's reasonable that productivity would take a hit. However, the experience of veteran remote workers suggests that tenure might help lessen the impact. A majority (60%) of experienced remote workers find working from home to be more productive, suggesting that experience may give workers a boost, even in extreme circumstances.

Sense of belonging: We see a big discrepancy between experienced and newly remote workers' connection with colleagues. Forty-five percent of newly remote workers

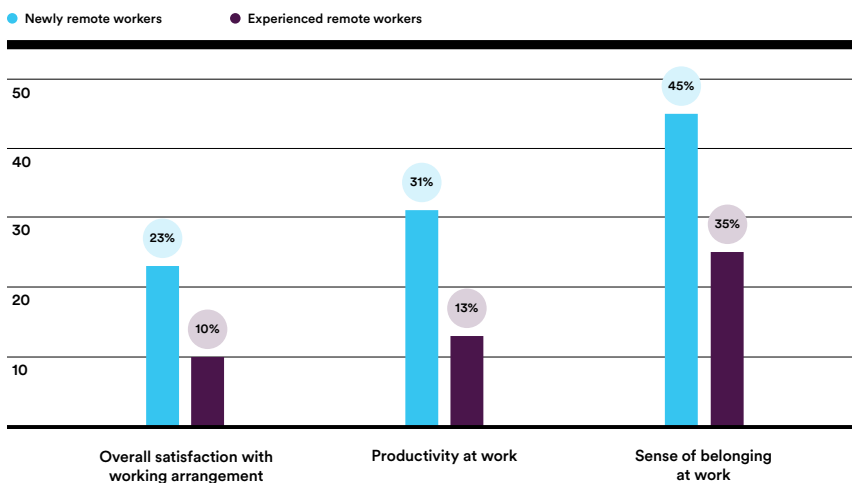
report that their sense of belonging suffers at home, compared with only 25% of experienced remote workers.

Framed another way, newly remote workers are nearly twice as likely as their experienced counterparts to say that their sense of belonging has taken a hit since they started working from home. This is particularly concerning because remote workers also report feelings of loneliness and isolation when working from home. But the answers of experienced remote workers give cause for optimism. Nearly half (47%) say their sense of belonging is better at home than in the office. This suggests that there are practices and tools that can strengthen work relationships remotely; newly remote workers might simply lack access to these resources.

Overall work satisfaction: Diminished productivity and feelings of disconnection can add up to overall professional dissatisfaction, especially for newly remote workers. Nearly one-quarter (23%) of newly remote workers are less satisfied working from home. Only 10%, roughly half as many, of experienced workers say the same.

Again, the experience of veteran remote workers is instructive. A whopping 72% say that they're more satisfied working from home. It's worth noting here that these workers, like the newly remote workers, were working from home during the pandemic—but they'd been doing so before states' stay-at-home orders took effect. This suggests that remote work can be satisfying, even during exceptional circumstances. It also shows us that experience, resources and support play a critical role in shaping workers' overall satisfaction with remote work.

Experienced vs. newly remote workers who say working from home is worse for the following indicators



Given the challenges around communication, connection and productivity, adopting new technology to support these areas is one of the most strategic investments a business leader can make. When we look at the impact of a channel-based messaging platform, such as Slack, on a remote workforce, we see improvements across worker morale, productivity, focus and communication.

The impact on belonging and loneliness

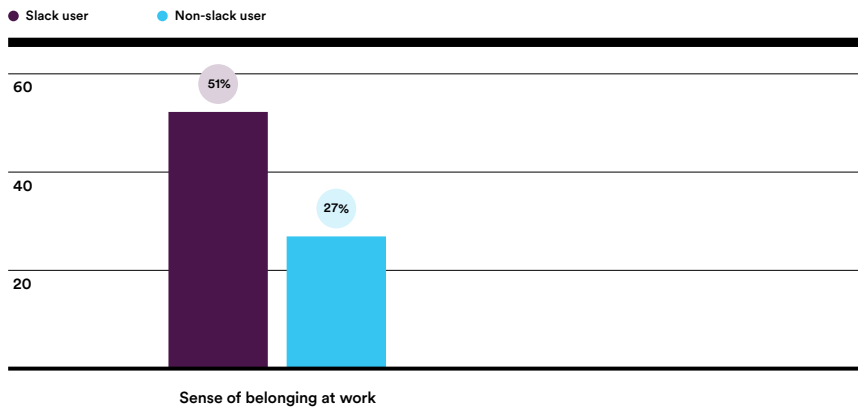
The data suggests that collaboration tools can have a significant impact on remote workers' feelings of connection. Slack users¹ are nearly twice as likely as non-Slack users to report that their sense of belonging improved while working from home. What's more, we see a decrease

in feelings of loneliness and isolation: 27% of non-Slack users say loneliness is a workplace challenge, compared with 18% of those who use Slack.

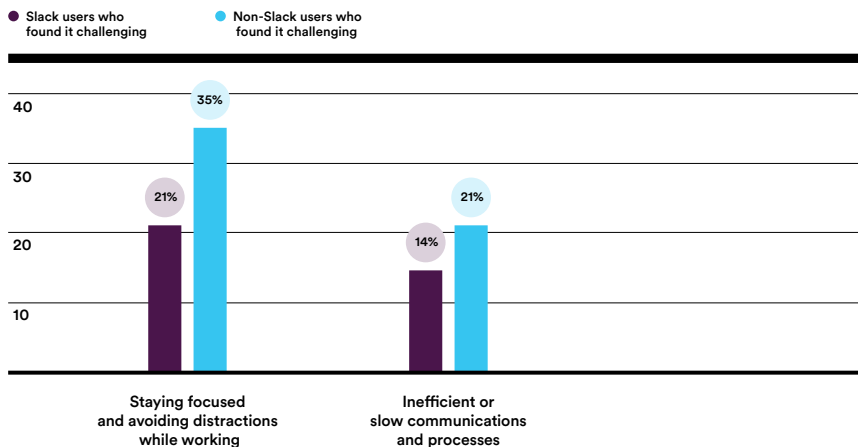
A productivity boost

We see similar results when remote workers are asked about productivity and other indicators of work efficiency. More than half (52%) of Slack users say that they're more productive at home, compared with 45% of non-Slack users. This makes sense given that Slack users are less likely to report focus and communication as challenges. If you're able to stay focused and communicate effectively, it follows that you'll be able to get more work done.

Slack vs. non-Slack users who say working from home improved their sense of belonging



Slack vs. non-Slack users on workplace challenges



¹ Slack users are defined as weekly active users, meaning they use Slack at least once per week.

STEPS BUSINESS LEADERS CAN TAKE TO SUPPORT REMOTE EMPLOYEES

Technology solutions work best when linked with policies and practices that support remote work. To uncover some of these, we went back to the data to identify strategies that can improve workers' at-home experiences. Here's what we learned:

Give workers autonomy. When workers have the freedom to make decisions and take initiative, they're more likely to thrive at home. The majority (86%) of those who prefer working from home over the office say they have "a great deal of autonomy" at work, compared with 77% of those who do not think working from home is better.

Understand that trust is more important than ever. When employees work from home, trust matters. Workers can't rely on impromptu hallway chats, body language and in-person meetings to untangle mixed messages or soften feedback. When workers feel they can rely on their team members, they're more likely to thrive at home than those who don't feel they can trust colleagues.

Clearly define team goals and each person's contribution. In times of uncertainty, it helps to know what's expected of you and that everyone is pulling in the same direction. Nearly one-third (31%) of workers who feel committed to their team goals prefer working from home over the office, compared with 18% of those who feel disconnected from their team's objectives.

Communicate your company's strategy. When workers no longer share physical office space, it becomes even more important to keep them connected to an overarching strategy. Remote workers who understand how their work contributes to their company's strategy and mission prefer working from home at nearly twice the rate of those who don't.

Prepare a remote work plan in advance. Employees notice plans (or their absence), and it affects their overall remote work experience. Of those who felt their company was highly prepared, 46% preferred working from home. But among those who felt their company was not highly prepared, only 17% preferred working from home.

OUR REMOTE WORK FUTURE

It's not clear when knowledge workers will be able to return to the office. And even when it's safe to do so, companies might choose to keep some of their workforce remote. According to a recent Gartner press release², "A Gartner, Inc. survey of 317 CFOs and finance leaders on March 30, 2020 revealed that 74% will move at least 5% of their previously on-site workforce to permanently remote positions post-Covid-19."^{**}

Our own data reveals a similar trend among respondents' return-to-work expectations. Near-term, 71% of those working from home because of the coronavirus expect to continue working remotely, at least to some extent, into late June. What started as a short-term crisis response appears to have long-term policy implications: Most knowledge workers, even those who say that their job is difficult to do remotely, believe that their companies will adopt more remote-work-friendly policies after the coronavirus pandemic.

Whichever way you cut the data, one thing is clear: U.S. knowledge workers are expecting to work from home more in the future. While there's no one-size-fits-all remote work playbook, the experiences of veteran remote workers show us what's possible: With the right practices and technology, business leaders can help ease feelings of isolation while improving communication, collaboration and productivity. But perhaps most importantly of all, leaders invested in getting remote work right can help employees navigate enormous change during uncertain times, whether workers are in the office or at home.

² Gartner Press Release, "Gartner CFO Survey Reveals 74% Intend to Shift Some Employees to Remote Work Permanently," April 3, 2020.