

# Back to the Workplace: Are we there yet?

*Key Insights from Employers  
One Year Into the Pandemic*

 **COVID-19**  
**WORKPLACE COMMONS**

 **Arizona State University**

 **WORLD ECONOMIC FORUM**

WITH SUPPORT FROM

 **The ROCKEFELLER FOUNDATION**

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# Executive Summary

The COVID-19 pandemic has altered every aspect of our lives – how we live, how we interact and how we work. It has taken a toll on the financial, emotional, mental and physical health of individuals, families, friends and colleagues. Our phones and computers became our life lines. Our homes became the workplace, the school, the daycare – a place of safety but isolation.

Work continues to play a central role in the lives of so many adults, so we wanted to understand how employers are reacting to the pandemic – what is changing, what is not – the good, the bad and the ugly.

In the very beginning of the pandemic, employers did not play an active role on a national scale. Policy was made by government and public health organizations. The medical establishment dominated the headlines on how businesses should keep their employees safe. Most employers that could have their employees work

from home allowed the employees to do just that. But that is changing. Employers are becoming more relevant and vocal on how they prepare their workforce, customers, suppliers and their community to return to the workplace. Retailers and service industries led the way as they did not have as many options for Work From Home. But, by the second quarter 2021, all employers are becoming more proactive. They are expanding their formal policies on how and when they will come together in person and clarifying their expectations.

This report, *Back to the Workplace - Are we there yet?*, features results from the second survey in a three-part series within the ASU Workplace Commons initiative which features an innovative, interactive back-to-workplace data dashboard that enables access to anonymized survey data from both phase 1 (fall 2020) and phase 2 (spring 2021) surveys. Responses to the survey came

from employers in 24 industry sectors and 1,339 facilities at 1,168 companies. Approximately 75% of responses are from large businesses with 250 or more employees and 95% of responses coming from companies based in the U.S. and U.K.

The report provides employer data about the impact of the pandemic on six different types of pandemic-related workplace practices including testing and contact tracing, vaccination, employee wellbeing, pandemic response and preparedness, financial impact and the future of work. In addition, the ASU Workplace Commons houses a number of employer case studies that provide practical insights into how employers around the world are responding to the pandemic. As the pandemic and employer responses continue to evolve, we will field one additional survey and publish the results during the summer of 2021.

# Top 10 Insights



## Vaccination Strong Support by Employers

- 88% of employers plan to require or encourage their employees to be vaccinated against COVID-19
- 59% of employers plan to incentivize their employees to be vaccinated against COVID-19
- 60% of employers will require employees to demonstrate proof of vaccination against COVID-19



## Employee Wellbeing Mental Health is now Central

- 77% of employers indicated that employee mental health and wellbeing has become a top priority for their company
- 58% increase in employee mental health concerns during the pandemic compared to pre-pandemic according to employers



## Testing Significant Increase by Employers

- 68% of employers are performing COVID-19 testing for at least some of their employees



## Work from Home Here to Stay

- 63% of employers intend to allow their employees to work from home full-time through 2021
- 69% of employers describe their anticipated future work environment as either hybrid (41%) or all virtual (28%)
- 72% of employers intend to offer more flexible or expanded work from home policies for their employees post-pandemic
- But ... 68% of employers believe that employees should be in the office at least 20 hours per week

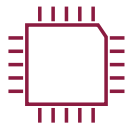
# Methodology

The COVID-19 Workplace Commons - Keeping Workers Well survey was distributed to more than 28,800 individuals, companies, and trade association leaders aged 18+ from 24 industry sectors residing in at least 31 countries on six continents. The survey was conducted online between March 1, 2021 and March 31, 2021 in English and approved by Arizona State University's Institutional Review Board (IRB). The survey contained 105 questions within seven broad categories including facility/company location and industry sector, testing and contact tracing, vaccination, employee wellbeing, the future of work, pandemic response and preparedness and financial impact. Respondents were informed that their participation would remain anonymous and confidential and were given the ability to skip any question within the survey. Ipsos, a global leader in market research, assisted with securing a majority of survey responses, resulting in 1280 completions through the use of multiple panels across various industry sectors in English-speaking countries with an emphasis on companies located in the U.S. or U.K with at least 250 employees. An identical publicly available survey resulted in 59 completions. Excluding responses with less than 90% completion rate, the survey resulted in 1,339 valid responses. Survey data were examined, including categorization of qualitative responses (e.g. 'Other - please specify') and transformation of variables for areas like industry sector and dates. ASU's Decision Theater summarized results and the data featured on the COVID-19 Workplace Commons website dashboard represents valid responses.



# Survey Overview

## Top 10 industries represented in rank order (Left-Right)



Technology and Software



Business + Professional Services  
(Accounting, Brokers, Corporate Banking, Legal, etc.)



Manufacturing



Construction



Healthcare, Hospitals, and Clinics



Retail Stores



Government and Quasi-Public



Education (Pre-K to 12)



Education (Colleges & Universities)



Energy & Utilities



**6**  
Continents

**24**  
Industries

**31**  
Countries

**1,168**  
Companies

**1,339**  
Facilities

# Vaccination

There are three ways to end a pandemic – the virus burns itself out, it becomes endemic and we live with COVID-19 like we live with the flu or we achieve herd immunity through vaccines or prior infection. The great news is that effective vaccines were developed in record time. The COVID-19 vaccines were developed within one year where previous vaccines took seven to ten years to create. The advent of vaccines and their rapid distribution, however, raises questions and concerns that many employers are grappling with for the first time.

Our survey showed surprisingly high support for vaccination with almost 90% of employers planning to require or at least encourage their employees to get vaccinated. Our survey asked employers their stance on a variety of other issues related to COVID-19 vaccination and their employees, and their responses indicate that vaccination is perceived as significantly important for keeping the workplace and their employees safe.

**59%**  
Plan to incentivize employees to be vaccinated

**84%**  
Would allow vaccinations to be administered to employees at their facility

**61%**  
Plan to change safety mitigation measures once broad vaccination is achieved

**60%**  
Will require employees to demonstrate proof of vaccination

**COVID-19 Vaccination Record Card**

Please keep this record card, which includes medical information about the vaccines you have received.

Por favor, guarde esta tarjeta de registro, que incluye información médica sobre las vacunas que ha recibido.

MI

\_\_\_\_\_ Last Name      \_\_\_\_\_ First Name

\_\_\_\_\_ Date of birth      \_\_\_\_\_ Patient number (medical record IIS record number)

Vaccine	Product Name/ Manufacturer Lot Number	Date	Healthcare Professional or Clinic Site
1 <sup>st</sup> Dose COVID-19	.....	mm / dd / yy	.....
2 <sup>nd</sup> Dose COVID-19	.....	mm / dd / yy	.....
Other	.....	mm / dd / yy	.....
Other	.....	mm / dd / yy	.....



# Companies' policies for employees regarding COVID-19 vaccination

**88%** Of employers will require or encourage vaccination for employees

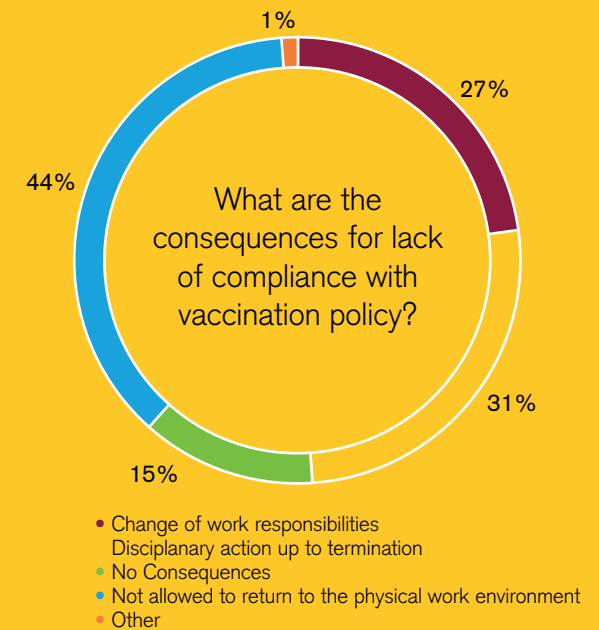
**40%**  
Require all employees to be vaccinated against COVID-19

**32%**  
Encourage but not require employees to be vaccinated against COVID-19

**16%**  
Require some employees to be vaccinated against COVID-19

**8%**  
We don't have a policy developed at this time

**4%**  
We don't plan to encourage or require our employees to be vaccinated against COVID-19





# Testing & Contact Tracing

**68%** Test their workers

**31%**  
Test only for viral  
infection

**5%**  
Test only for  
antibodies

**59%**  
Test for both

Testing remains the most effective way to measure and confirm the success of virus mitigation efforts including vaccination. It is in this area where we saw the most dramatic change in employer behavior. In our earlier study in the fall of 2020, we saw 17% of companies testing any of their employees. Although the fall study had smaller companies on average, we were surprised, but pleased, to see a dramatic increase. In this study, we saw a full 68% of companies reporting that they were testing at least some part of their workforce.

Why the big increase in testing? First, the test supply situation has fundamentally changed since the end of 2020. In the spring of 2021, it became relatively easy to acquire tests and hire testing service providers. There are more labs and companies with EUA's and most have enough capacity that there are few shortages. For lab-based tests, results are most often returned within 48 hours, often faster. For rapid tests, performance including pros and cons are better understood. Second, with this competition and improved technologies, the cost to test has dramatically decreased. Lastly, and maybe most importantly, knowledge of how a testing program can work has increased confidence amongst employers that testing can be integrated without too much disruption.



## Reasons why companies choose not to test\*

**30%** Too costly

**29%** Too complicated to implement

**22%**  
Worried about employee privacy

**19%**  
Concerned about test accuracy

**18%**  
Worried about liability

**17%**  
Test availability

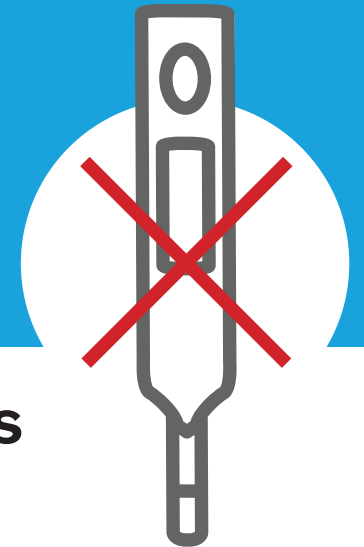
**15%**  
Other

**13%**  
Time to obtain test results

**11%**  
Lack of knowledge or information

\* Multiple responses are allowed

• The above distribution represents 68% of companies that test their workers



## Future plans for companies who aren't testing

**36%**  
Uncertain

**34%**  
Don't test and don't plan to test



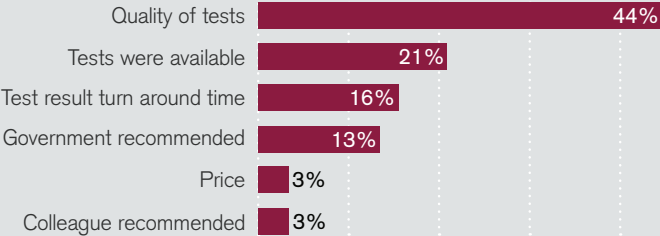
# Viral Testing

**826** (91%)  
Companies that test for viral infection

**73%**  
Companies with mandatory testing

**72%**  
Companies that test at least once a week

### What was the most important factor in you choosing a test provider?



### How frequently are you performing viral testing?

**43%** Once a week

**29%**  
Daily

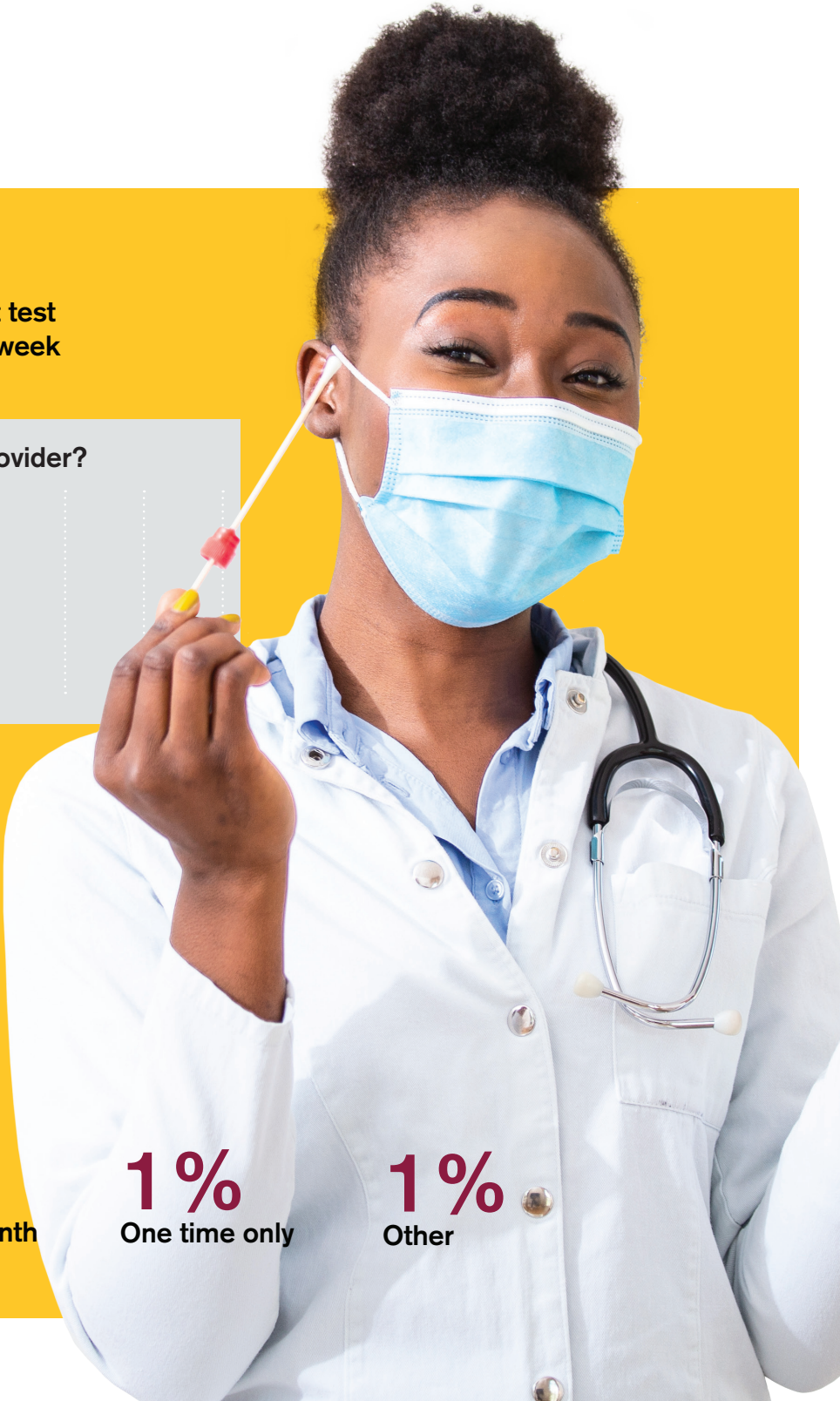
**13%**  
Once a month

**7%**  
Only when symptomatic

**6%**  
Twice a month

**1%**  
One time only

**1%**  
Other





# Viral vs. Antibody Testing

## What are the future plans for

Maintain testing at current levels

Increase testing

Reduce testing

Not sure

Stop testing

## Viral Testing

44%

42%

10%

2%

1%

## Antibody Testing

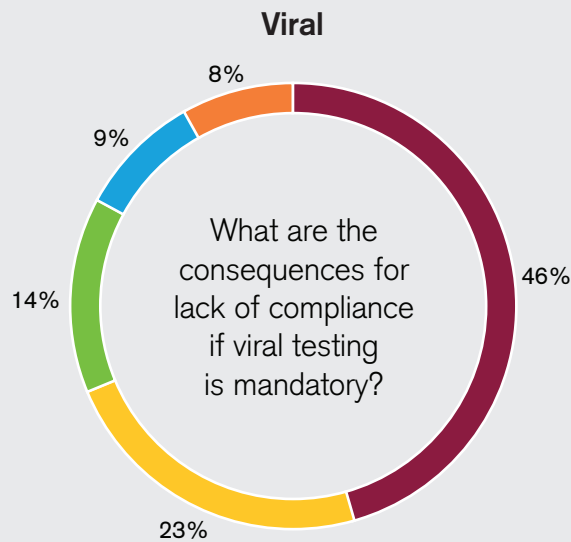
38%

48%

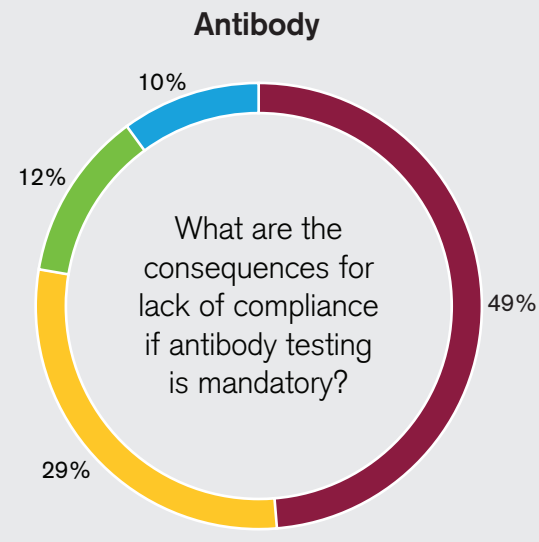
9%

1%

3%



- 10-14 day quarantine at home
- Change of work responsibilities
- Disciplinary action up to termination
- No consequences
- There are no company testing requirements



- 10-14 week quarantine at home
- Change of work responsibilities
- Disciplinary action up to termination
- There are no company testing requirements

# Viral vs. Antibody Testing

## Viral

Costs represented as median

**1:1**

Direct to indirect cost ratio for viral tests

**34%**

Workers that tested positive

## Where are your workers being tested?\*

**39%**

Health testing laboratory

**37%**

On site at our facility

**29%**

Local/regional hospital

**21%**

Retail pharmacy

**12%**

Academic or university site

**9%**

At home

\* Multiple responses are allowed



# Antibody

Costs represented as median

**1:1**  
Direct to indirect cost  
ratio for antibody test

**41%**  
Workers that tested  
positive

## Where are your workers being tested?\*

**50%** Health testing  
laboratory

**40%**  
Local/regional  
hospital

**25%**  
On site at our  
facility

**15%**  
Academic or  
university site

**9%**  
At home

\* Multiple responses are allowed



# Contact Tracing

**58%**

Companies  
that perform  
contact tracing

Are you tracing worker contacts  
outside of the workplace?

**65%**  
Yes

**31%**  
No

**4%**  
Unsure





## What requirements does COVID positive worker need to meet to return to workplace?\*

**66%** 10-14 day quarantine at home

**29%**  
One negative viral test

**29%**  
Two negative viral tests

**11%**  
No symptoms for a week

**5%**  
No requirements

\* Multiple responses are allowed

# Employee Wellbeing

# 77%

Of employers indicated that employee mental health wellbeing has become a top priority for their company

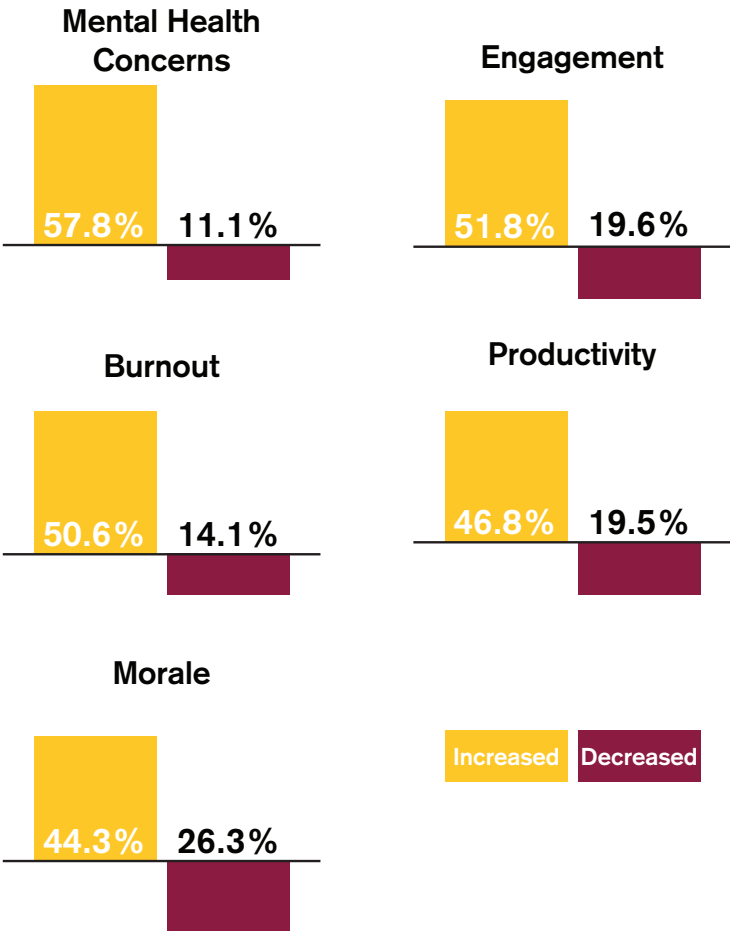
It is almost too obvious to say that everyone's health and wellbeing has been impacted by the pandemic. While physical health has taken the center stage, mental health is now being acknowledged as every bit a crisis as well. Loneliness, depression and anxiety are present in every demographic. Work has been central to those challenges – too little work for some and too much work for others.

Our survey focused on five key areas of employee well-being: mental health, burnout, productivity, morale and engagement. The goal was to understand employers' perceptions of how their employees' wellbeing changed during the pandemic.

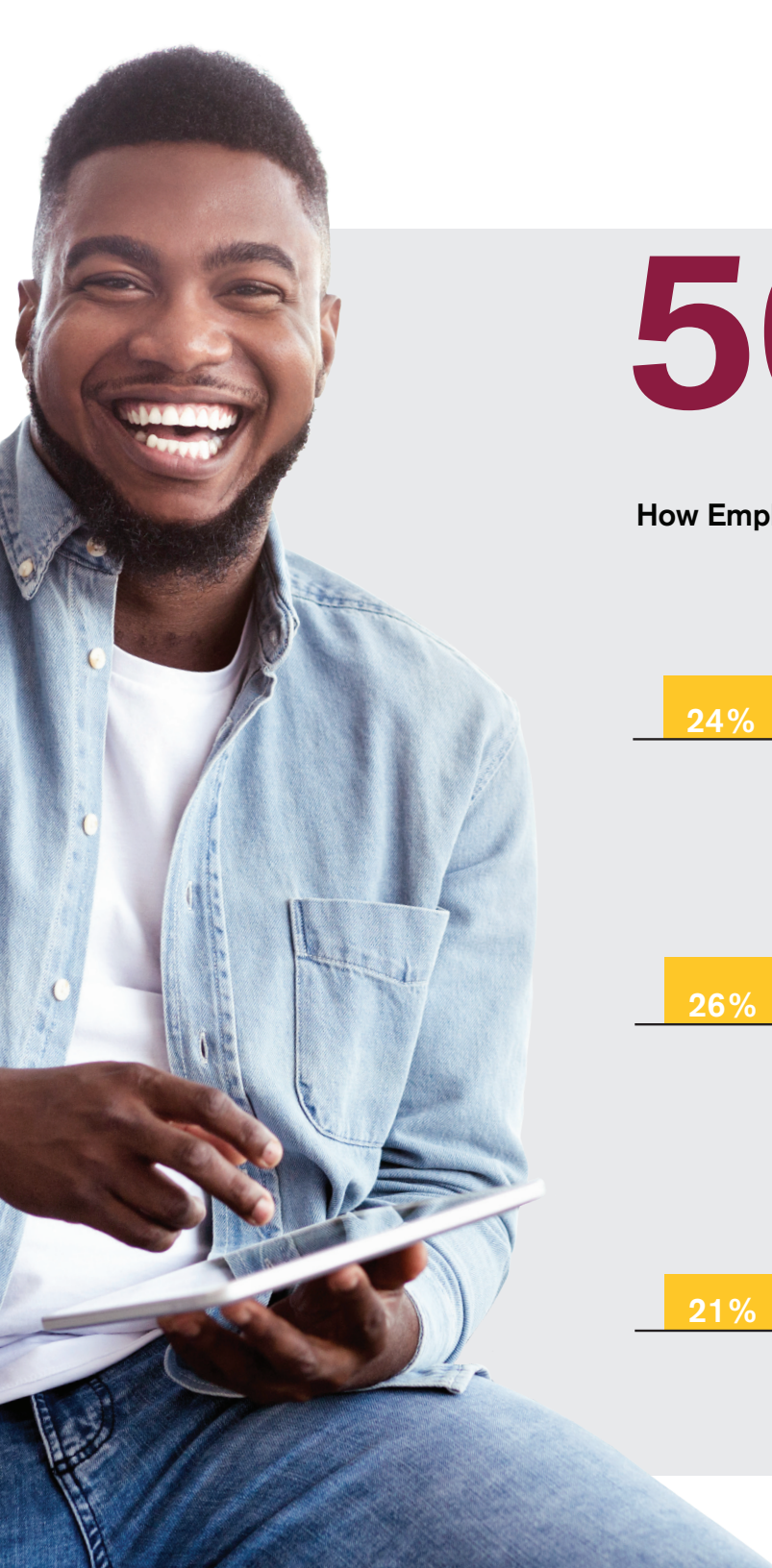
The good news is that employers understand. More than three-quarters said that employee mental health is now a top priority. More than half of employers reported an increase in the use of available company resources related to mental health. Perhaps, most impressive however is that through all of this stress, employers reported employee engagement and morale increased by over 40%.

The bottom line for us is that so many are working so hard to keep it all together – to balance work, family, friends and even some fun. For the most part, it has worked, but we are not sure how much longer that balancing act can last.

How Employee Wellbeing Changed During the Pandemic Compared to Pre-Pandemic



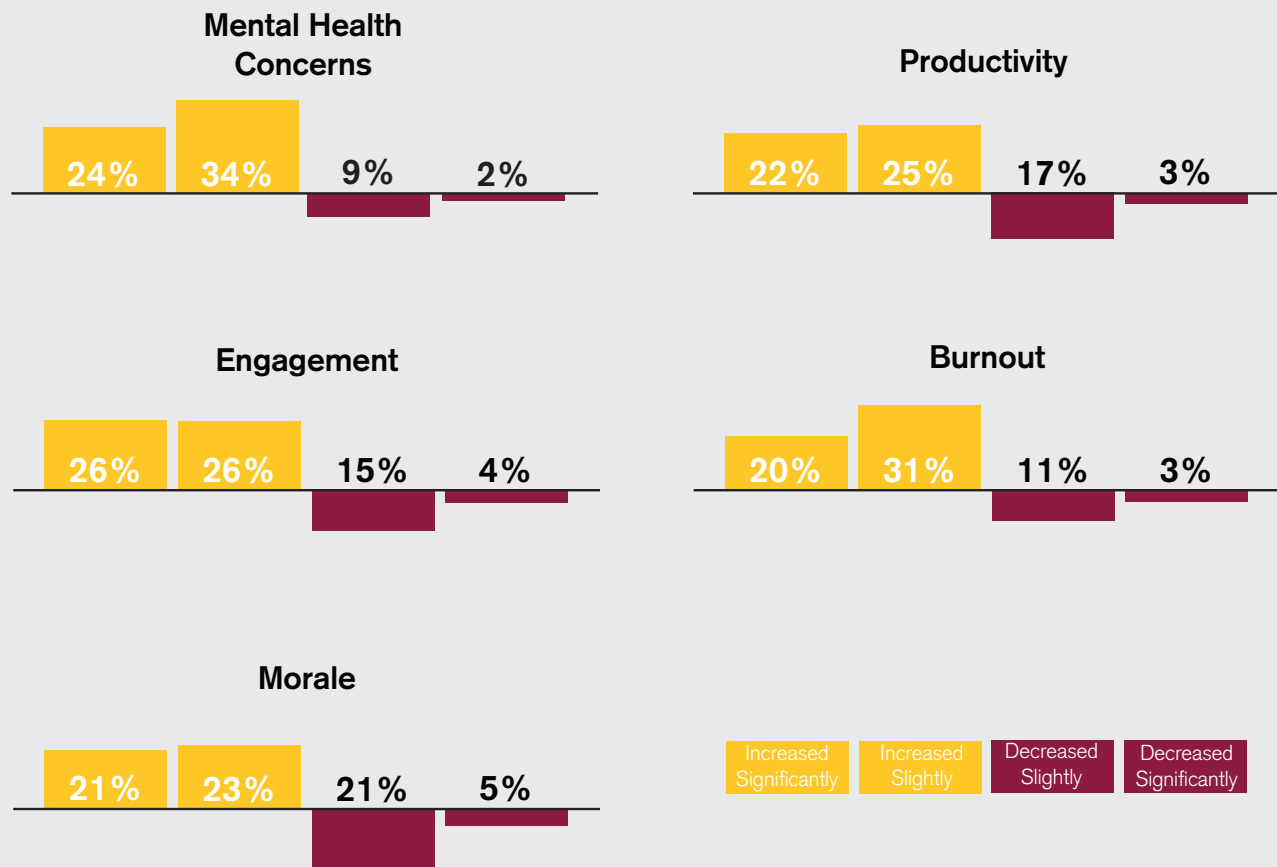




# 50%

Of employers reported an increase in the use of available company resources related to mental health since the pandemic began

## How Employee Wellbeing Changed During the Pandemic Compared to Pre-Pandemic



# Future of Work Overview

**72%**

**Intend to offer flexible or expanded work from home policies post-pandemic**

**68%**

**Believe employees should be in the office at least 20 hours a week**

**63%**

**Intend to allow employees to work from home full-time through 2021**



How will the pandemic change our work life in the future? Will it improve? The answer is clearly in the eyes of the beholder. Our survey showed that the “Work From Home” phenomenon will not end soon and will not end as abruptly as it began.

Companies reported that 57% of their employees are still remote and almost two-thirds of employers plan to allow their employees to remain remote through 2021. Yet employers understand the value of people coming together under one roof – over two-thirds of global employers believe that employees should be in the office at least 20 hours per week citing their top reason as it allows for social connections to be formed and maintained amongst colleagues. Interestingly, the most commonly cited challenge by employers for not returning to the physical workspace is that employees did not want to return, and they indicated that personal health and facility safety were the top concerns of their workforce.







## Reasons why companies think employees should be in the office at least 20 hours a week

**22%**

Allows for social connections to be created and maintained

**17%**

Ensures employee productivity

**16%**

Allows for spontaneous idea sharing and problem solving

**12%**

Contributes to creating and defining company culture

**10%**

Develops social skills needed when interacting with clients

**10%**

Encourages team-building

**7%**

Ensure use of facility

**3%**

Provides ability to monitor employee performance

**3%**

Ensures proper training and mentoring of new employees



# Future of Work Overview

Describe your anticipated work environment in the future

**41 %** Hybrid  
(Combination of virtual and physical)

**32 %** Physical      **28 %** Virtual



## Companies future plans for their physical workspace

**55%** Keep as is

**27%**  
Downsize

**14%**  
Decrease size of physical workspace

**4%**  
No longer offer a physical workspace



The most challenging issues companies are facing in regards to returning employees to the physical work environment in rank order:

**1**  
Employees not wanting to return to in-person work

**2**  
Safety of employees

**3**  
Cost of making workspace safe for employees



# Coming Back and Remote Work

**69%** Positive attitude towards returning

**28%** Negative attitude towards returning

**69%** Highest % of remote employees during pandemic

**57%** Current % of remote employees



When do you expect your workforce to come back to work onsite?

**9%** The next month

**31%** The next three months

**35%** The next six months

**12%** Longer than six months

**12%** Not sure





## What are worker's concerns about returning?\*

**60%**

Personal health /  
Higher risk for  
infection

**58%**

Safety at  
facility

**31%**

Childcare

**27%**

Transportation  
to facility

**2%**

Other

\* Multiple responses are allowed

### Primary concern about coming back

Personal health / High risk for infection



# Coming Back and Remote Work

What milestones need to occur in order for you to return workforce to work onsite?\*

**55%** When government or health agency allows

**46%** When all of our workforce is vaccinated

**36%** Decreasing cases in the community

**35%** When a majority of our workforce is vaccinated

**30%** When we have testing protocols in place

**24%** When we have planned safety measures in place

**8%** Predetermined time

\* Multiple responses are allowed







## What is the overall workforce's opinion about returning back to the workplace?

**40%** They want to return eventually but not immediately

**23%** They are reluctant to return

**15%** They want to return immediately

**14%** They wanted to return earlier than possible

**5%** They do not want to return

**3%** No feedback

**Open Again**





# Pandemic Response & Preparedness

## Actions

**1137** Companies that made temporary adjustments

**1127** Companies that made permanent adjustments



How long do you expect temporary actions to last?

**15%**  
The next month

**26%**  
The next three months

**28%**  
The next six months

**15%**  
Longer than six months

**10%**  
Not sure

**7%**  
Not applicable



# Reduction in workforce

Top permanent action taken due to financial pressures

# Hiring freeze

Top temporary action taken due to financial pressures

## What actions have you taken?\*

(Permanent / Temporary)

**38%/29%**

Reduction in workforce

**34%/37%**

Hiring freeze

**29%/25%**

Reduced hours for hourly workers

**25%/25%**

Executive / management pay cuts

**23%/25%**

Furloughs

**21%/19%**

Closure

**18%/19%**

Rescinding job offers

**18%/15%**

Reduced internship opportunities

**16%/11%**

Bonuses or other incentives

**15%/0%**

Changes in employee health benefits

**14%/9%**

Increased salary for hourly workers

**13%/13%**

Reduced pay for non-management workers

**13%/10%**

Increased hiring

**8%/6%**

Increased salary for non-management workers

**2%/2%**

Other

\* Multiple responses are allowed

# Pandemic Response & Preparedness

## Preparedness

**71%**

Had emergency response plan in 2019

**52%**

Plan was very useful in response to COVID-19

There is no surprise that few companies were fully prepared for a pandemic. Our research confirmed that while the majority of companies acknowledged that they have some emergency plans, only half had prepared for an epidemic or pandemic. This unprecedented challenge was new but by proactively developing emergency response plans, over half of employers indicated that these plans were very useful in their current response. It seems to be broadly acknowledged that despite still being in the throes of this current pandemic, the opportunity exists now to proactively plan and prepare for future pandemics.

Employers can, and we expect will, play a more critical role in the future by collaborating and sharing their collective successes and failures during this pandemic to prepare for the next one. The ASU Workplace Commons initiative provides case studies from our partner, the World Economic Forum, that share approaches to workplace safety and business continuity from around the world.

### Have these plans been useful for responding to the COVID-19 pandemic?

**52%**

Very useful

**28%**  
Mostly useful

**15%**  
Somewhat useful

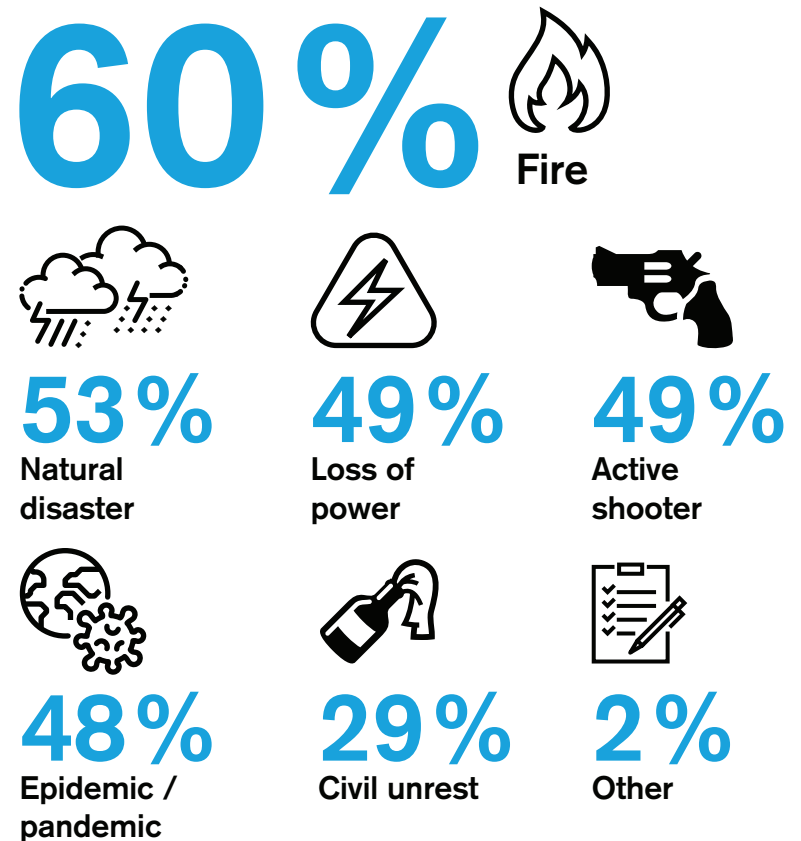
**6%**  
Not at all useful







## What type of emergency plans did those companies have?\*



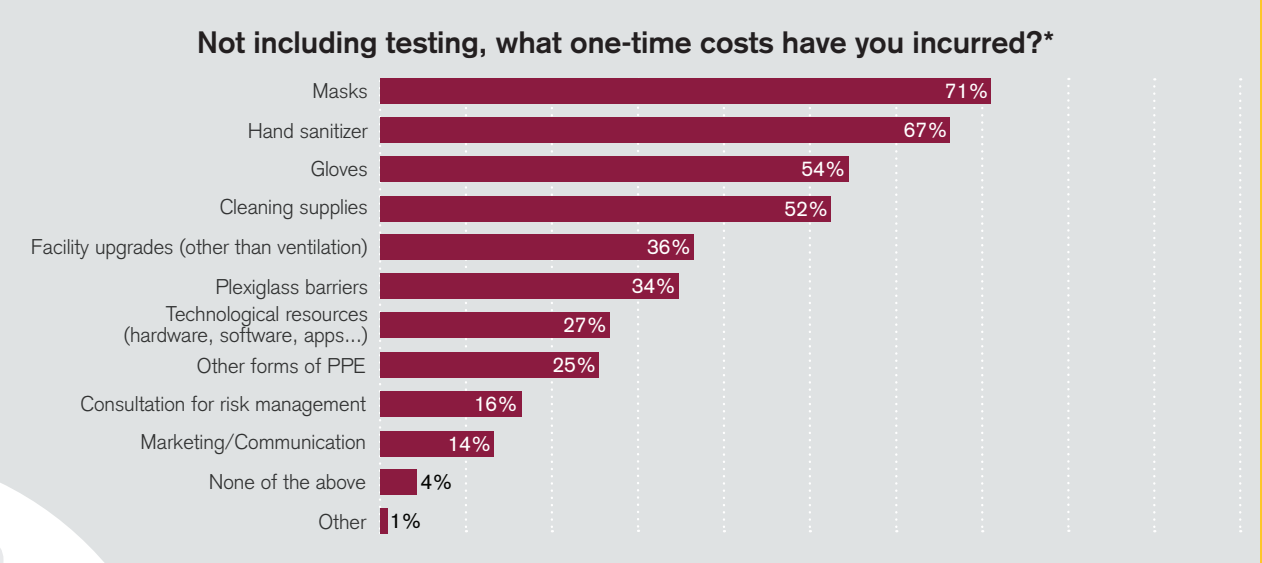
\* Multiple responses are allowed

# Financial impact

# 47%

**Over 25% increase in operating costs (excluding testing) due to the pandemic**

Keeping workers and customers safe is imperative but also comes at a significant cost – direct and indirect. For direct costs – nearly half of respondents reported over 25% increases in operating costs due to the pandemic with masks being the top one-time incurred expense. The indirect costs and loss of revenue varies broadly by industry. However, the most common response amongst all industries as a result of the economic disruption were temporary and permanent reductions in their workforce as well as hiring freezes.



\* Multiple responses are allowed



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