

COVID AND THE WORKPLACE

A survey of workers in 33 countries

December 2021

For more information, go to <https://www.ipsos.com/en/covid-and-the-workplace-dec-2021>

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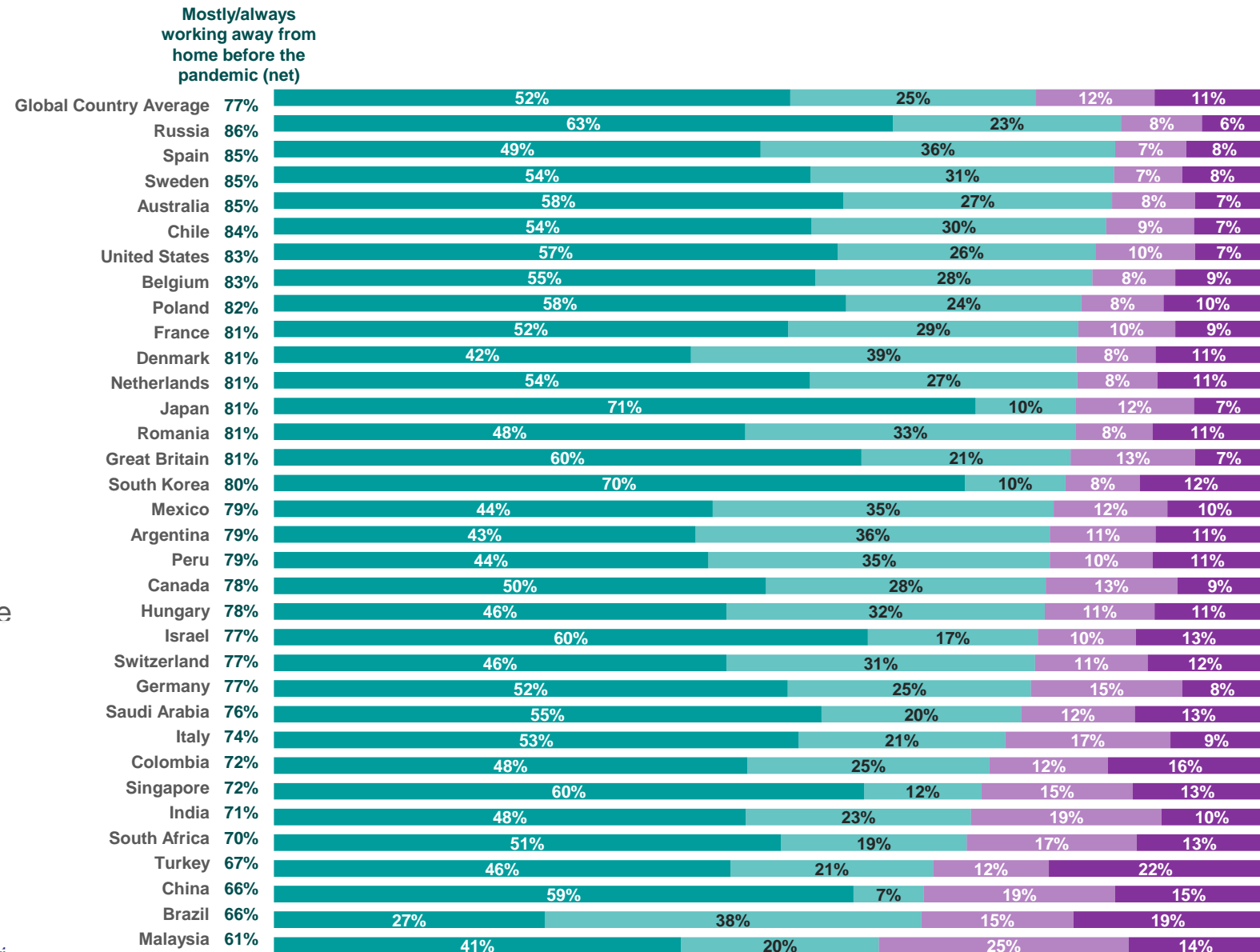
GAME CHANGERS



MOST WORKED AT LEAST PARTIALLY AWAY FROM HOME PRE-PANDEMIC

Q. Which best describes how you were working just before the pandemic started early last year?

- I mostly or always worked in an office away from my home
- I mostly or always worked away from my home, but not in an office
- I mostly or always worked from my own home
- Sometimes I worked at home and sometimes away from my home



Base: 14,401 online, employed adults aged 18--74 across 33 countries

* Online samples in Brazil, Chile, mainland China, Colombia, India, Israel, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

PRE-PANDEMIC WORK LOCATION BY KEY DEMOGRAPHICS

Q. Which best describes how you were working just before the pandemic started early last year?

	Global Country Average	Gender		Age			Household Income			Education			Business Owner		Sr Exec/DM/Leader	
		Male	Female	Under 35	35 to 49	50 to 74	Low	Medium	High	Low	Medium	High	Yes	No	Yes	No
I mostly or always worked in an office <u>away</u> from my home	52%	51%	54%	50%	55%	52%	45%	51%	57%	43%	49%	59%	41%	55%	48%	54%
I mostly or always worked <u>away</u> from my home, but not in an office	25%	28%	21%	26%	24%	25%	29%	29%	20%	33%	30%	16%	26%	25%	22%	26%
I mostly or always worked from my own home	12%	11%	14%	13%	11%	12%	14%	11%	12%	11%	11%	14%	18%	11%	16%	10%
Sometimes I worked at home and sometimes away from my home	11%	11%	11%	11%	10%	12%	12%	10%	11%	12%	11%	11%	16%	10%	14%	10%
Mostly/always <u>away</u> from home (net)	77%	78%	76%	76%	79%	77%	74%	79%	77%	77%	79%	76%	66%	80%	71%	80%

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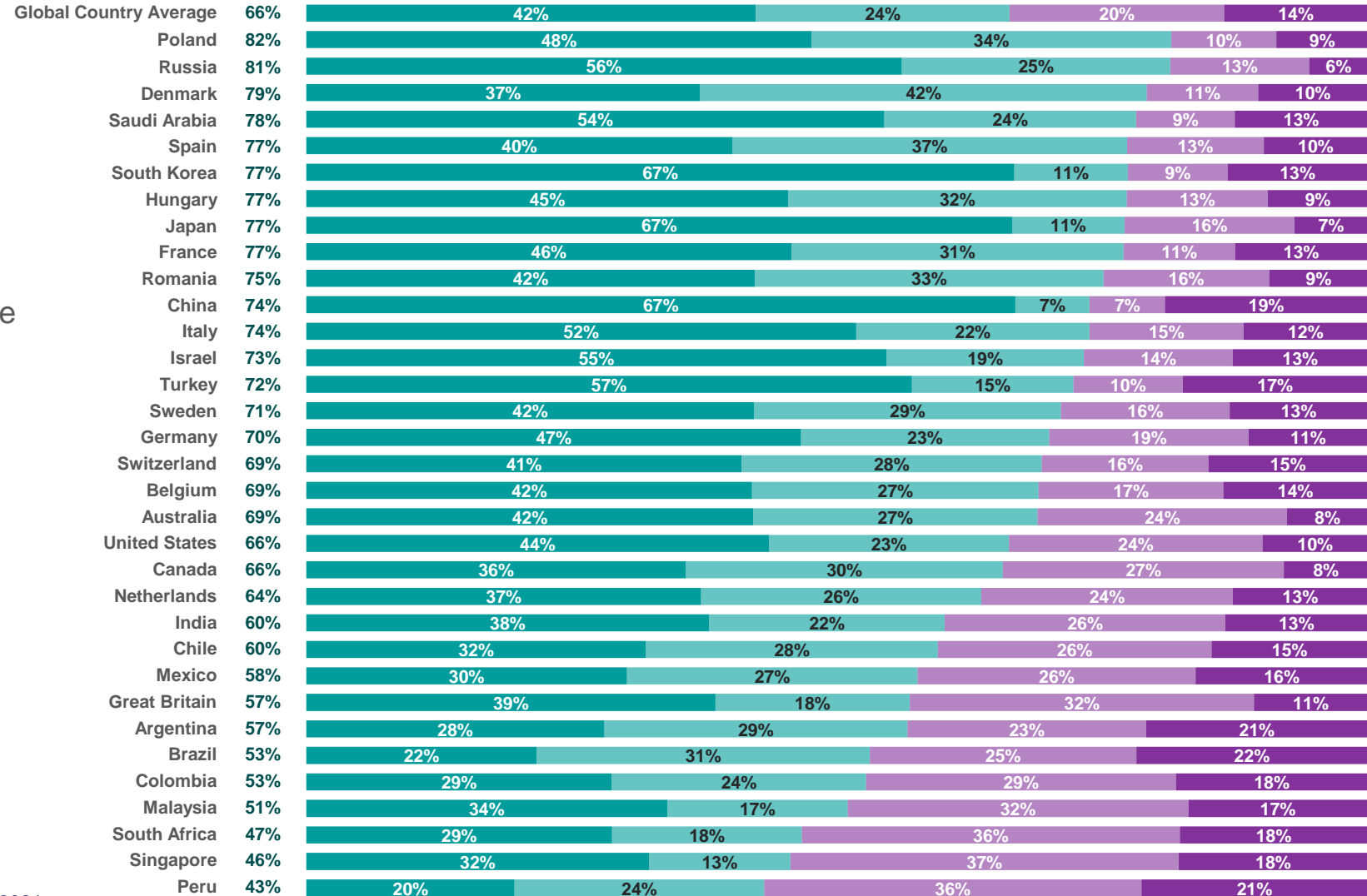
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TWO IN THREE ARE CURRENTLY WORKING AT LEAST PARTIALLY AWAY FROM HOME

Q. Which best describes how you are working now?

- I mostly or always work in an office away from my home
- I mostly or always work away from my home, but not in an office
- I mostly or always work from my own home
- Sometimes I work at home and sometimes away from my home

Mostly/always working away from home currently (net)



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CURRENT WORK LOCATION BY KEY DEMOGRAPHICS

Q. Which best describes how you are working now?

	Global Country Average	Gender		Age			Household Income			Education			Business Owner		Sr Exec/DM/Leader	
		Male	Female	Under 35	35 to 49	50 to 74	Low	Medium	High	Low	Medium	High	Yes	No	Yes	No
I mostly or always work in an office <u>away</u> from my home	42%	42%	43%	40%	45%	42%	38%	40%	47%	39%	41%	46%	32%	45%	39%	44%
I mostly or always work <u>away</u> from my home, but not in an office	24%	27%	20%	26%	23%	23%	29%	27%	19%	35%	28%	16%	22%	24%	20%	26%
I mostly or always work from my own home	20%	18%	23%	20%	19%	21%	19%	20%	21%	15%	18%	25%	30%	18%	25%	18%
Sometimes I work at home and sometimes away from my home	14%	13%	14%	13%	13%	14%	14%	13%	13%	12%	13%	14%	17%	13%	15%	13%
Mostly/always <u>away</u> from home (net)	66%	69%	63%	66%	67%	65%	67%	67%	66%	73%	68%	61%	54%	69%	59%	69%

Base: 14,401 online, employed adults aged 18--74 across 33 countries

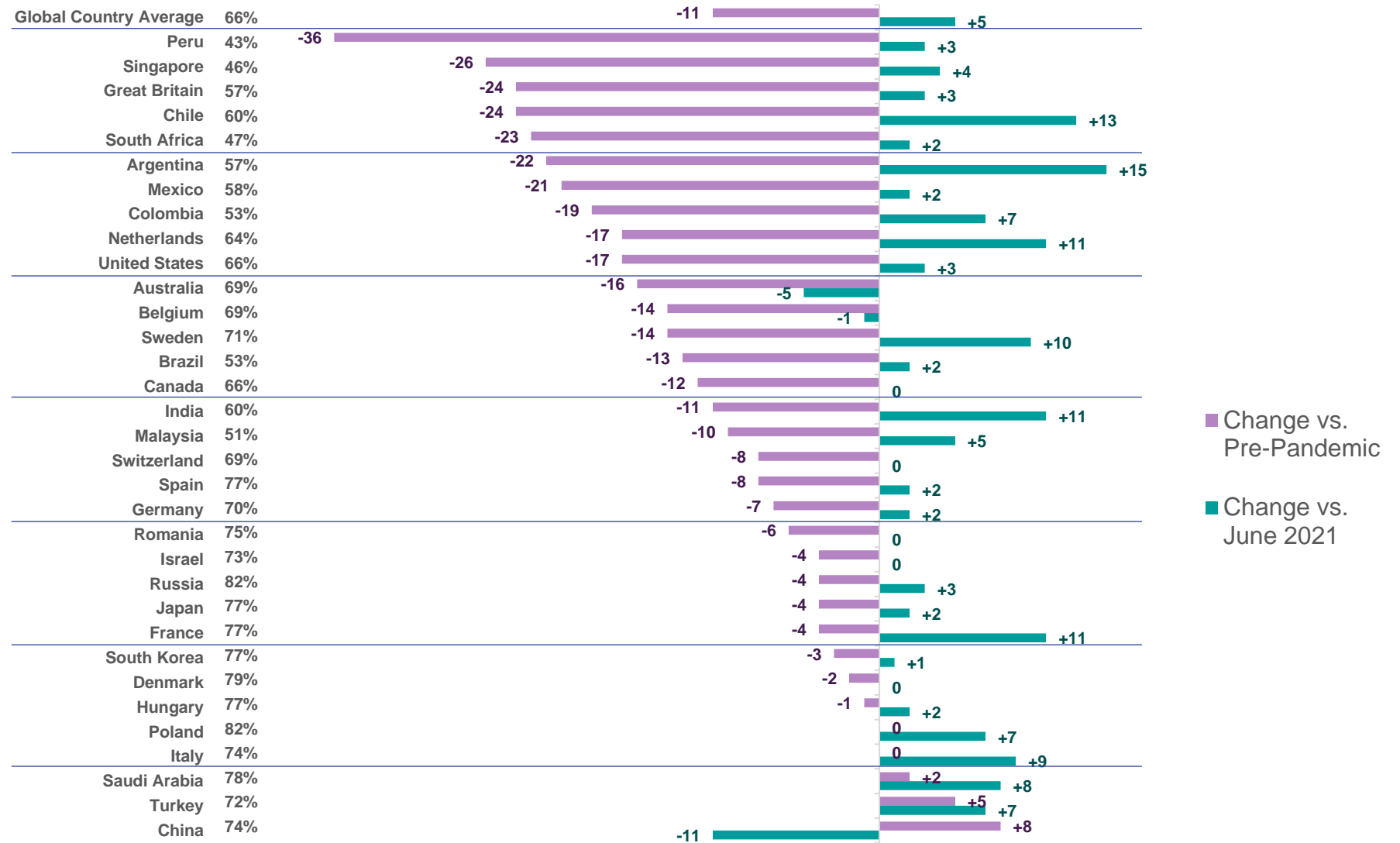
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IN MOST COUNTRIES, FEWER WORK AWAY FROM HOME THAN DID PRE-PANDEMIC, BUT MORE DO NOW THAN DID IN JUNE

Currently employed adults always or mostly working away from home

Change vs. pre-pandemic and vs. June 2021 (difference in percentage points)



Note: No comparisons vs. June 2021 available for Denmark, Israel, Romania, Singapore, and Switzerland

Base: 14,401 online, employed adults aged 18--74 across 33 countries
 * Online samples in Brazil, Chile, mainland China, Colombia, India, Israel, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

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THOSE WITH A HIGHER LEVEL OF EDUCATION ARE LESS LIKELY TO HAVE RETURNED TO PRE-PANDEMIC WORKPLACE

Currently employed adults always or mostly working away from home

Change vs. pre-pandemic and vs. June 2021 (difference in percentage points)

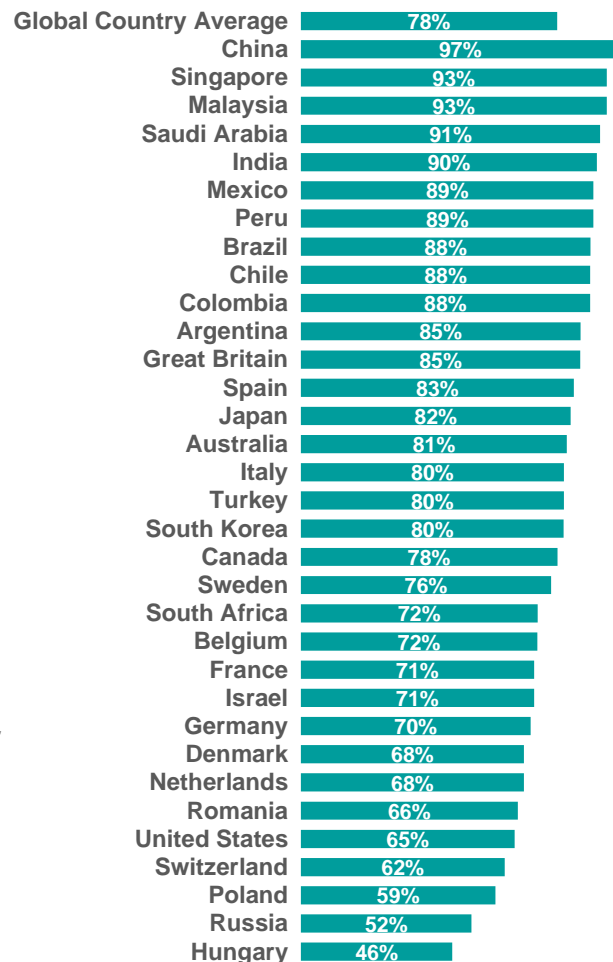


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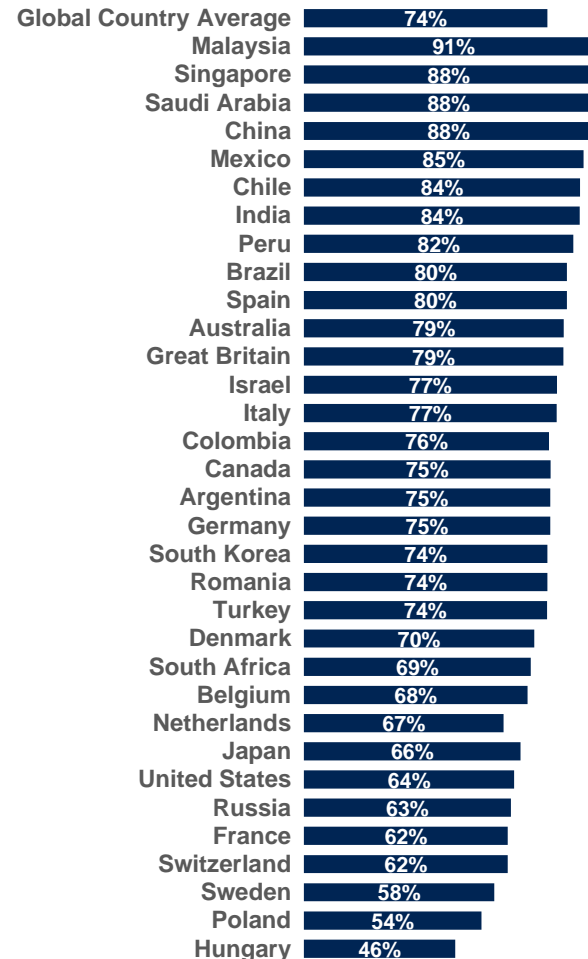
MOST SUPPORT WORKPLACE VACCINATION, TESTING AND MASKING MANDATES

Currently employed adults agreeing they and people in their workplace should...

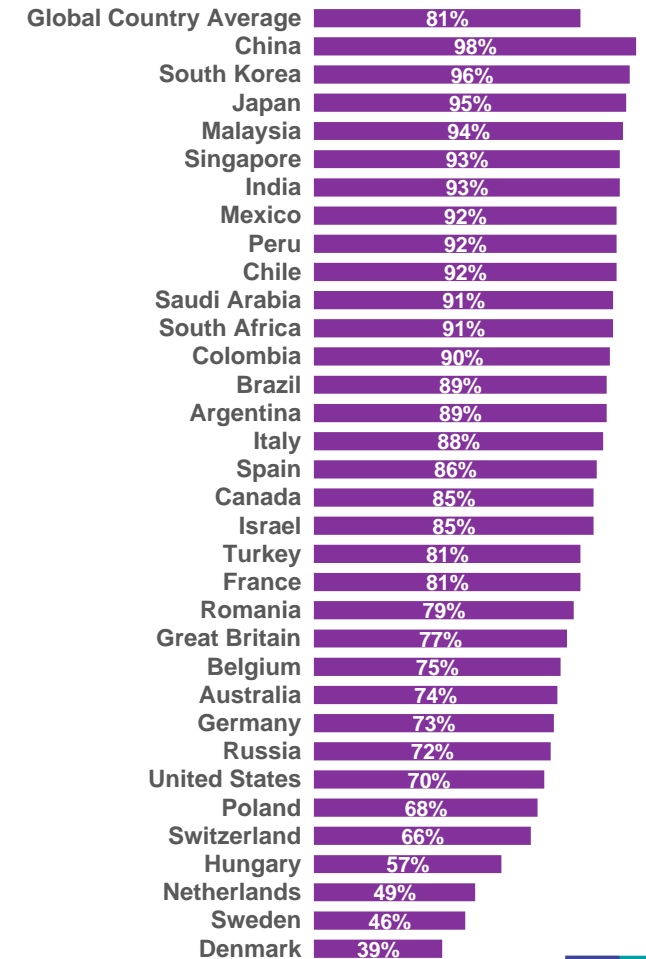
Be fully vaccinated against COVID



Undergo frequent COVID testing if not vaccinated against COVID



Wear a mask in common areas and when in proximity with other people



Q. How much do you agree or disagree that each of following should be required of you and people in your workplace?

Base: 14,401 online, employed adults aged 18--74 across 33 countries

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SUPPORT FOR WORKPLACE VACCINATION, TESTING AND MASKING MANDATES BY KEY DEMOGRAPHICS

Q. How much do you agree or disagree that each of following should be required of you and people in your workplace?

% who strongly or somewhat agree they and people in their workplace should...

	Global Country Average	Gender		Age			Household Income			Education			Business Owner		Sr Exec/DM/Leader	
		Male	Female	Under 35	35 to 49	50 to 74	Low	Medium	High	Low	Medium	High	Yes	No	Yes	No
Be fully vaccinated against COVID	78%	78%	77%	75%	78%	82%	78%	79%	78%	73%	76%	82%	80%	78%	81%	77%
Undergo frequent COVID testing if not vaccinated against COVID	74%	74%	75%	72%	75%	77%	75%	75%	75%	69%	73%	78%	77%	74%	78%	73%
Wear a mask in common areas and when in proximity with other people	81%	80%	83%	79%	82%	83%	82%	80%	83%	78%	79%	84%	82%	81%	83%	80%

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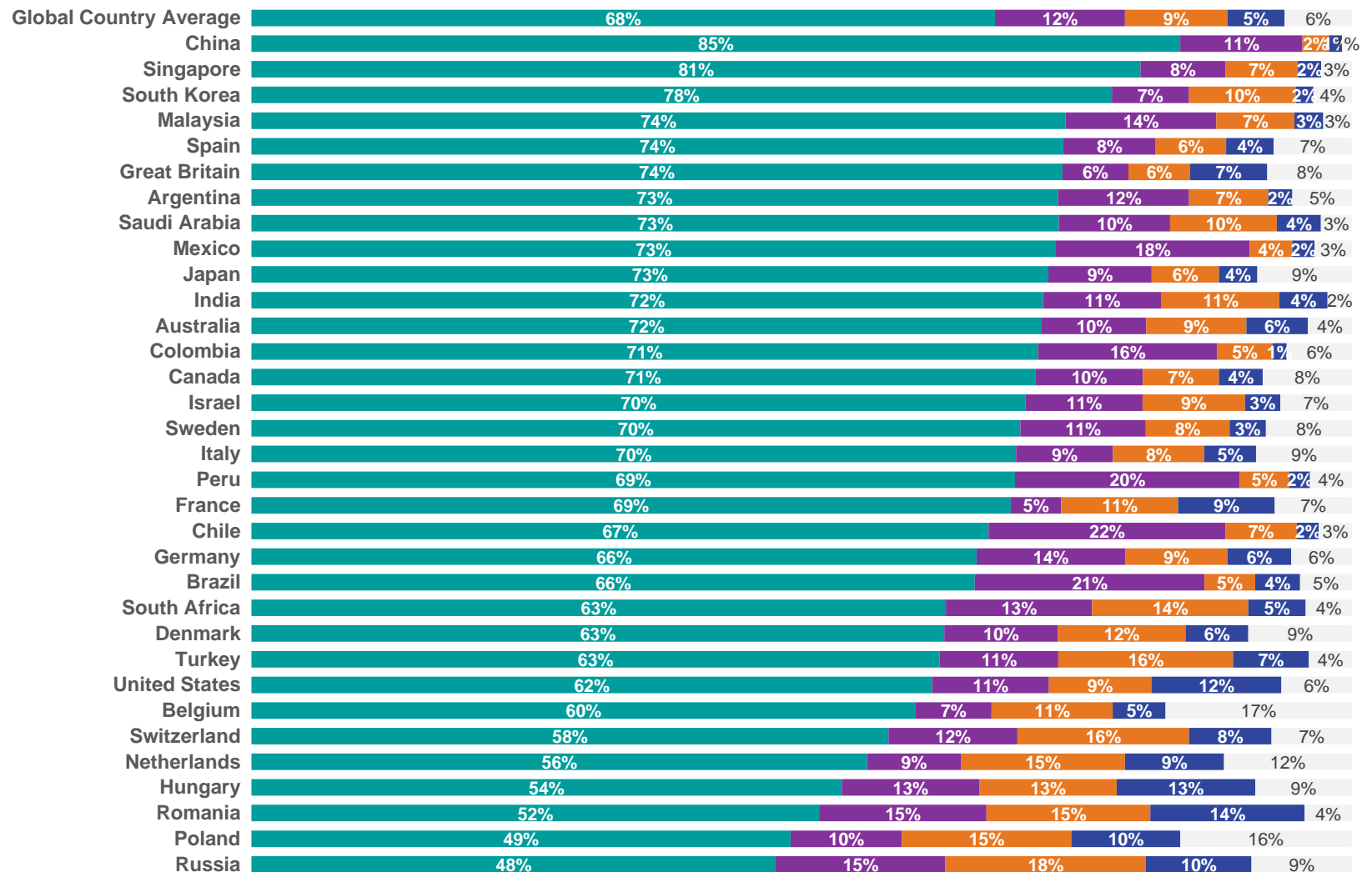
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MOST WOULD CHOOSE TO GET VACCINATED OR UNDERGO FREQUENT TESTING IF REQUIRED TO KEEP THEIR JOB

Q. If you are or were required to either be vaccinated against COVID or to undergo frequent COVID testing in order to keep your job, which of the following did you or would you do?

- Get vaccinated
- Opt for frequent testing
- Figure out a way to not get vaccinated or tested and still keep your job
- Quit my job/find another job
- Don't know



Base: 14,401 online, employed adults aged 18–74 across 33 countries

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RESPONSE TO EMPLOYEE VACCINATION OR TESTING MANDATE BY KEY DEMOGRAPHICS

Q. If you are or were required to either be vaccinated against COVID or to undergo frequent COVID testing in order to keep your job, which of the following did you or would you do?

	Global Country Average	Gender		Age			Household Income			Education			Business Owner		Sr Exec/DM/Leader	
		Male	Female	Under 35	35 to 49	50 to 74	Low	Medium	High	Low	Medium	High	Yes	No	Yes	No
Opt for frequent testing	12%	12%	12%	14%	11%	10%	12%	13%	11%	12%	13%	10%	13%	11%	14%	11%
Get vaccinated	68%	67%	68%	61%	69%	74%	66%	67%	70%	61%	66%	72%	63%	69%	65%	69%
Quit my job / find another job	5%	6%	5%	7%	5%	4%	6%	5%	5%	8%	5%	4%	7%	5%	6%	5%
Figure out a way to not get vaccinated or tested and still keep your job	9%	10%	9%	12%	9%	7%	10%	9%	9%	11%	9%	9%	13%	9%	11%	9%
Don't know	6%	6%	7%	7%	6%	6%	6%	6%	5%	9%	7%	5%	4%	7%	4%	7%

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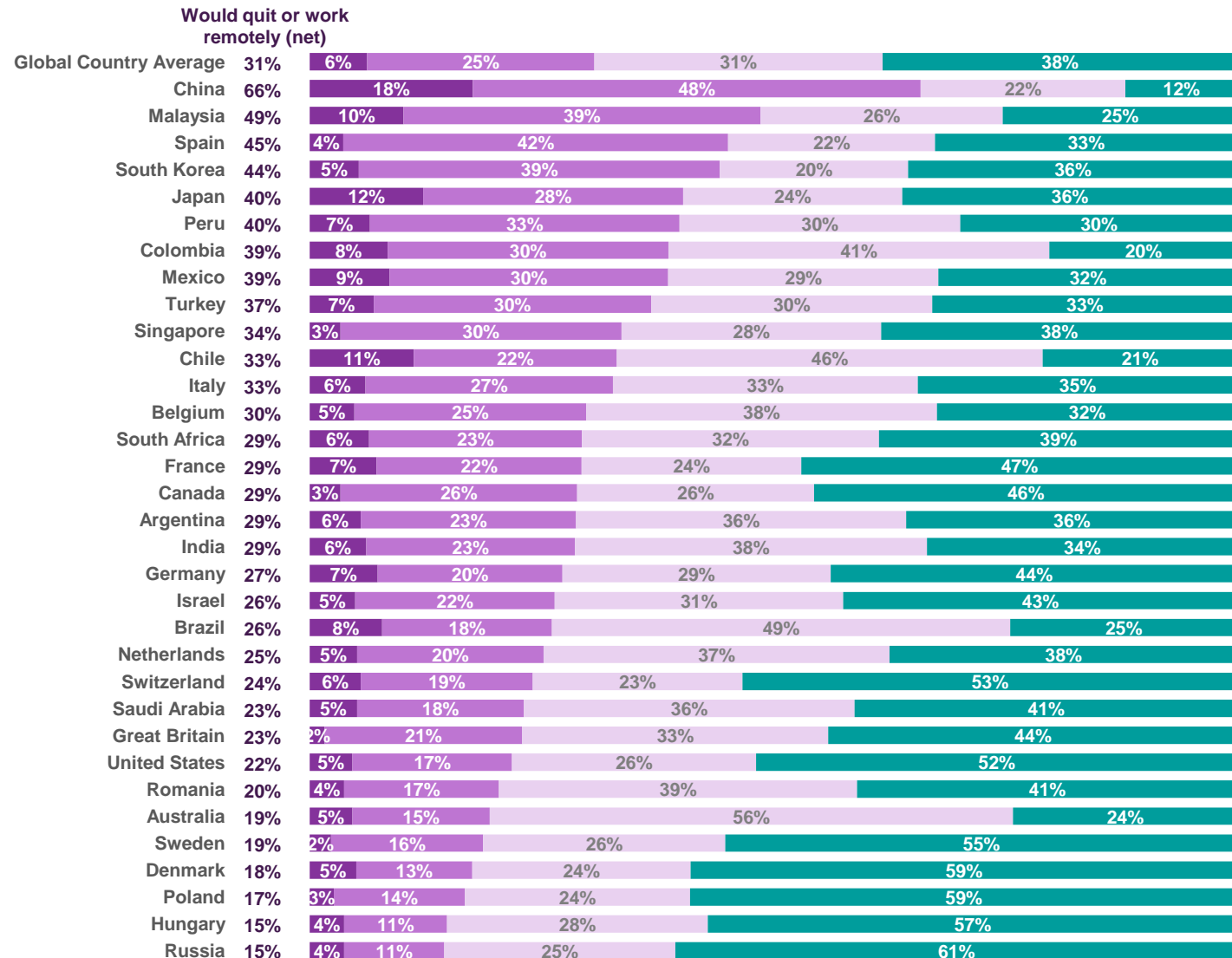
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DISPARATE LEVELS OF DISCOMFORT IN THE ABSENCE OF WORKPLACE VACCINATION, TESTING OR MASKING MANDATES

Q. If employees at your workplace were allowed to work without wearing a mask, undergoing frequent COVID testing, or being vaccinated against COVID, would you...?

- Be uncomfortable going to work there and quit your job
- Be uncomfortable going to work there and work remotely instead
- Be uncomfortable going to work there, but go in anyway
- Be comfortable going to work there



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RESPONSE TO THE ABSENCE OF WORKPLACE VACCINATION, TESTING OR MASKING MANDATES BY KEY DEMOGRAPHICS

Q. If employees at your workplace were allowed to work without wearing a mask, undergoing frequent COVID testing, or being vaccinated against COVID, would you...?

	Global Country Average	Gender		Age			Household Income			Education			Business Owner		Sr Exec/DM/Leader	
		Male	Female	Under 35	35 to 49	50 to 74	Low	Medium	High	Low	Medium	High	Yes	No	Yes	No
Be comfortable going to work there	38%	41%	35%	40%	39%	34%	35%	39%	39%	41%	40%	35%	37%	39%	37%	39%
Be uncomfortable going to work there, but go in anyway	31%	30%	32%	29%	31%	33%	36%	32%	29%	34%	30%	31%	25%	33%	27%	33%
Be uncomfortable going to work there and work remotely instead	25%	23%	26%	24%	24%	26%	21%	24%	27%	18%	23%	29%	32%	23%	30%	22%
Be uncomfortable going to work there and quit your job	6%	6%	7%	7%	6%	6%	7%	6%	6%	7%	7%	5%	7%	6%	6%	6%
Would quit or work remotely	31%	29%	33%	30%	30%	32%	29%	30%	33%	25%	30%	34%	38%	29%	36%	28%

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METHODOLOGY

These are the results of a 33-country survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 14,401 employed adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey, and 16-74 in all 27 other countries, between Friday, October 22 and Friday, November 5, 2021.

The sample consists of individuals who are currently employed. The sample sizes range from n=261 in Sweden to n=835 in China (mainland) with an average of n=436 per country.

The sample consists of approximately 1,000 individuals in each of Australia, Brazil, Canada, mainland China, France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and 500 individuals in each of Argentina, Belgium, Chile, Colombia, Denmark, Hungary, India, Israel, Malaysia, Mexico, the Netherlands, Peru, Poland, Romania, Russia, Saudi Arabia, South Africa, South Korea, Sweden, Switzerland, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, Denmark, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, Switzerland, and the U.S. can be taken as representative of employed adults in these countries.

The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey are more urban, more educated, and/or more affluent than their country's population of employed adults. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their employed population.

The data is weighted so that each country's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of don't know or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

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Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.