Home Workers

JM TVC 1902 HE

Client: Citrix
Date: 1st to 9th September 2020
Sample: 2005
Demographic: US Knowledge workers
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Home Working

With reference to post-lockdown behaviour

• Post lockdown, views on the benefits of city life have changed:
  • The proportion who see big city living as beneficial to the career has fallen from 46% (46.27%) to just 21% (21.31%)
  • The neutral sentiment is up from 32% (32.37%) to 41% (41.21%)
  • 28% (28.21%) of US Knowledge Workers now say living in a city can hurt your career
  • 47% (47.4%) of US Knowledge workers think they’d be likely to relocate to a rural area, if they could still work as normal
  • While 57% (57.38%) would relocate to the suburbs if circumstances allowed
  • Just over three quarters (78.82%)* of US Knowledge workers now say they could do their jobs just as effectively from any location
  • Almost the same proportion (77.04%)* now want to be able to work more flexibly and from home
  • When asked if they had or were going to relocate as a result of permanent remote working due to the pandemic 25% (24.66%) (494 individuals) said ‘Yes’.

* - changes since V1 of the report
Question:
BEFORE LOCKDOWN.
Do you think that living in a large city (e.g. New York, Chicago, San Francisco, Los Angeles etc.) had a positive or negative effect on residents’ career opportunities and progression?

Insight
• Up until early 2020, Knowledge Workers were fairly sanguine that being a resident of a big city was a positive (46%) or a neutral (32%) thing for one’s career.
Question:

Present Day - AFTER LOCKDOWN. Do you think that living in a large city (e.g. New York, Chicago, San Francisco, Los Angeles etc.) had a positive or negative effect on residents'; career opportunities and progression?

Insight

- Post lockdown the position is massively different.
- The proportion who see big city living as beneficial to the career has fallen from 46% to just 21%
- The neutral sentiment is up from 32% to 41%
- And, most concerning/interesting, a full 28% of US Knowledge Workers think living in a city can hurt your career
• 47% of US Knowledge workers think they’d be likely to relocate to a rural area, if they could still work as normal
• While 57% would relocate to the suburbs if circumstances allowed

How likely would you be to consider relocating to a **rural area** if you could still perform your role to the same level without commuting?

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very likely</td>
<td>22%</td>
</tr>
<tr>
<td>Fairly likely</td>
<td>25%</td>
</tr>
<tr>
<td>Not very likely</td>
<td>23%</td>
</tr>
<tr>
<td>Not at all likely</td>
<td>16%</td>
</tr>
<tr>
<td>N/A - I live in a rural area</td>
<td>8%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
</tr>
</tbody>
</table>

How likely would you be to consider relocating to a **SUBURB** if you could still perform your role to the same level without commuting?

<table>
<thead>
<tr>
<th>Likelihood</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Very likely</td>
<td>28%</td>
</tr>
<tr>
<td>Fairly likely</td>
<td>29%</td>
</tr>
<tr>
<td>Not very likely</td>
<td>13%</td>
</tr>
<tr>
<td>Not at all likely</td>
<td>10%</td>
</tr>
<tr>
<td>N/A - I don’t live in a city</td>
<td>16%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>4%</td>
</tr>
</tbody>
</table>
Question:

... you indicated a willingness to relocate to a suburb or rural area, given the right work circumstances. Listed below are possible reasons for why you might say this. Please indicate how much you agree or disagree with each statement:

<table>
<thead>
<tr>
<th>Statement</th>
<th>Nett Agreement %</th>
</tr>
</thead>
<tbody>
<tr>
<td>I could do my job just as effectively from any location</td>
<td>74%</td>
</tr>
<tr>
<td>I would like to be able to work more flexibly and from home</td>
<td>73%</td>
</tr>
<tr>
<td>I believe a suburban location would offer me a healthier work/life balance</td>
<td>66%</td>
</tr>
<tr>
<td>I believe a rural location would offer me a healthier work/life balance</td>
<td>57%</td>
</tr>
<tr>
<td>The cost of living in a city area is crippling and my salary isn’t keeping pace</td>
<td>50%</td>
</tr>
<tr>
<td>There is no need for me to be a city location anymore as my job is now a remote role</td>
<td>28%</td>
</tr>
<tr>
<td>I am tired of the city lifestyle</td>
<td>25%</td>
</tr>
<tr>
<td>There is no need for me to be in a city location anymore as my company has reduced or closed office space</td>
<td>21%</td>
</tr>
<tr>
<td>I cannot afford to buy a property in my current city location, and would like to</td>
<td>16%</td>
</tr>
<tr>
<td>The cost of my rent is equivalent to more than 30% of my monthly salary</td>
<td>9%</td>
</tr>
<tr>
<td>I still want to perform my job but have a personal situation (i.e. health, disability, caring for a family member) that makes it difficult for me to travel to the city for work</td>
<td>-17%</td>
</tr>
</tbody>
</table>

Insight

- Three quarters (74%) of US Knowledge workers now say they could do their jobs just as effectively from any location.
- Almost the same proportion (73%) now want to be able to work more flexibly and from home.
- The “death of the office” may not yet have arrived, but it’s clear that – for many US Knowledge Workers – the pandemic has moved them in that direction.
The exodus has begun

• ASKED: Do you plan to, or have you already, relocated somewhere as a result of permanent remote working due to the pandemic?
  • 25% (24.66%) (494 individuals) said Yes.

• 9% of the people relocating are moving (or have moved) somewhere rural.
• While 23% have relocated to the suburbs.
• 44% (43.56%) of the relocators (213 individuals) think their move is permanent
• Motives among these 213 were:

12. Why have you chosen to relocate to a smaller city, suburb, rural area or different state? *

My job is now permanently 100% remote due to the coronavirus pandemic 37%
I only need to go to the office once a week 25%
I wanted to move to a quieter area 24%
The coronavirus pandemic has shown that I can do my job from anywhere and my employer supports this 22%
Lower taxes 20%
Lower living costs 19%
Lower housing/accommodation cost 18%
I wanted to move to a more stable area 17%
I can afford to buy a house by moving location 16%
I only need to go to the office once a month 15%
It’s easier to maintain social distance from others 13%
I only need to go to the office once a quarter 13%
I only need to go to the office every six months or more 11%

* percentages reworked to base on 213, not whole base
Any questions?

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