Return to Work/Back to Business Study
Executive Summary

As leaders consider when and how to reopen the economy, people are hesitant.

While most organizations are looking at facts like hospitalization and testing rates, it is equally important to understand perceptions—how people feel. In a study of more than 2,000 Americans, we asked people what needed to be true for them to feel confident returning to the workplace, dining at restaurants, and visiting other public establishments.

Overall, the American workforce is not confident about returning to the workplace:

- 2 out of 3 people said they would feel uncomfortable returning to the workplace right now
- Workers of all ages—from Boomers to Gen Z—are equally uncomfortable going back to work; more than 65% in every age group reported being uncomfortable returning to the workplace
- 25% of respondents expect to return to workplace in May and 28% more expect to by the end of June, while nearly half (48%) think they won’t go back until August or later

To feel comfortable returning to the workplace, people want:

- Assurance from authorities: 63% want the CDC to say it’s safe, while half say their state and local officials saying the same would help
- Effective medical interventions: A little less than half say a treatment (47%) or vaccine (45%) would make them feel safe returning
- Safety policies: 47% say they want all employees to be required to wear masks, 45% said they want a no handshakes/hugs policy at work, and 38% said they want employees who travel for work or pleasure to be required to self-quarantine for 14 days afterward
Before returning to work, I want my company to have:

- A work facility that has been and will be thoroughly cleaned and disinfected regularly (74%)
- Consulted with local and state authorities who say it is safe to return to work (63%)
- Set strict policies regarding who cannot come to the office (anyone who is sick, recent travel etc.) (62%)
- Make masks available to anyone who wants one (57%)
Before returning to work, I want the option to:

- Wear a mask: 64%
- Maintain social distancing at work (6’+ between my and my nearest co-worker): 61%
- Have more flexible sick leave policies which employees are encouraged to utilize with even minor symptoms: 50%
- Limit the number of people I am exposed to in workplace meetings: 49%
- Have temperatures checked each day before entering the building: 43%
Before returning to work, I want my company to ensure the following of my co-workers:

- Hand sanitizer and cleaning supplies available at all times throughout the office: 70%
- All employees are required to wear a mask all of the time: 57%
- Social distancing will be implemented at work (have at least 6’ of space between co-workers): 50%
Executive Summary

Consumers are nervous, and they’re holding back:

- Nearly half (48%) of people think that we will never “get back to normal”
- 68% of people still feel uncomfortable going to a restaurant, while half feel the same about shopping retail in-person. When businesses reopen, there is no guarantee that people will come back …
- Most people are uncomfortable with attending a live sporting event (79%), live concert (78%), riding public transit (77%), going on a flight (75%), and going to the gym (71%)
- 25% of people who regularly attend sporting events said they are unlikely to attend in the foreseeable future
- 38% of people said they would not be comfortable going to a live concert until at least January 2021

People also remain uncomfortable interacting with each other

- 68% are uncomfortable playing a team sport
- 60% would feel uncomfortable attending a religious service in person
- 60% of people say they would be uncomfortable voting in-person at a polling place
Return to Work
Are you comfortable going back to work?

Less than a quarter (24%) of people said they would feel comfortable returning to the workplace right now, 10% were neutral, and the majority (66%) were uncomfortable

- Republicans were 2X as likely as Democrats to say they were comfortable returning to their workplace, though only 1 out of 3 Republicans said they would feel comfortable going back right now.

- 60% of people say they would be uncomfortable voting in-person at a polling place

- Workers in the Midwest much more likely to feel comfortable returning to the workplace right now than those in the Northeast
  - Midwest: 28%
  - West: 25%
  - South: 23%
  - Northeast: 19%
What must be true for you to feel comfortable going back to work?

Most (63%) employees would feel comfortable going back to work once public health organizations and local government officials have said it is safe to return to the workplace. A little less than half said they would not be comfortable returning to the workplace until an effective treatment or vaccine are finalized.

Outside of that criteria, employees said they want to see the following to feel confident returning to the workplace:

1. The ability to maintain social distance (6 feet between people)—38.9%
2. Their company leadership to deem it safe—26.8%
3. Transit options that are sanitary and safe—21.6%
4. Schools and childcare facilities open back up—20.4%
Before returning to work, I want my company to have:

- Work facility has been and will be thoroughly cleaned and disinfected regularly: 74%
- Consulted with local and state authorities who say it is safe to return to work: 63%
- Set strict policies regarding who cannot come to the office (anyone who is sick, recent travel, etc): 62%
- Masks available to anyone who wants one: 57%
Before returning to work, I want my company to ensure that I can:

- Wear a mask: 64%
- Maintain social distancing at work (at least 6' of space between my and my nearest co-worker): 61%
- Have more flexible sick leave policies which employees are encouraged to utilize with even: 50%
- Limit the number of people I am exposed to in workplace meetings: 39%
- Have my temperature checked each day before entering the building: 43%
- Allow me to skip work without penalty if I feel unsafe: 37%
- Continue working from home if I don’t feel safe going to the office: 36%
- Receive viral testing on-site (tells a person if they are currently infected): 35%
- Receive antibody testing on-site (tells a person if they have been infected): 31%
- Not be required to travel for work: 29%
- Allow me to work remotely at any point without penalty if I feel unsafe: 28%
Before returning to work, I want my company to ensure the following for my co-workers:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hand sanitizer and cleaning supplies available at all times throughout the office</td>
<td>70%</td>
</tr>
<tr>
<td>Employees are required to wear a mask all of the time</td>
<td>37%</td>
</tr>
<tr>
<td>Social distancing will be implemented at work (have at least 6 ft of space between co-workers)</td>
<td>50%</td>
</tr>
<tr>
<td>Employees are required to wear a mask if they have even minor symptoms</td>
<td>47%</td>
</tr>
<tr>
<td>No handshakes/hugs policy at work</td>
<td>49%</td>
</tr>
<tr>
<td>People are not allowed in the office who should work from home (e.g., health reasons)</td>
<td>42%</td>
</tr>
<tr>
<td>Limits on the number of people who can attend workplace meetings in person</td>
<td>41%</td>
</tr>
<tr>
<td>Considerable safety measures around any communal food (disinfected, sanitized before entering the building, etc.)</td>
<td>39%</td>
</tr>
<tr>
<td>Employees who voluntarily travel for work or personal reasons are required to self-quarantine at home for 14 days after the trip</td>
<td>31%</td>
</tr>
<tr>
<td>Temperature checks are done on all people entering the building</td>
<td>37%</td>
</tr>
<tr>
<td>People will be brought back in phases rather than all at once</td>
<td>37%</td>
</tr>
<tr>
<td>Vial testing available to all employees on-site (tells a person if they are currently infected)</td>
<td>30%</td>
</tr>
<tr>
<td>Antibody testing available to all employees on-site (tells a person if they have been infected)</td>
<td>31%</td>
</tr>
<tr>
<td>No employees are required to travel for work</td>
<td>32%</td>
</tr>
<tr>
<td>No non-employees are permitted to enter the office</td>
<td>19%</td>
</tr>
</tbody>
</table>
I trust company leadership to make the best decision on when employees should return to work

- Agree: 69%
- Neutral: 16%
- Disagree: 15%
<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 1 - 15th</td>
<td>8%</td>
</tr>
<tr>
<td>May 16 - 31st</td>
<td>17%</td>
</tr>
<tr>
<td>June</td>
<td>28%</td>
</tr>
<tr>
<td>July</td>
<td>16%</td>
</tr>
<tr>
<td>August - December</td>
<td>25%</td>
</tr>
<tr>
<td>2021 or Later</td>
<td>6%</td>
</tr>
</tbody>
</table>
Back to Business
Do you think things will get back to normal?

Yes, they will return to how they were beforehand: 52%

No, they will never be the same: 48%
Under traditional circumstances, what would you have purchased or spent money on since the beginning of March that you have chosen to delay?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing</td>
<td>52%</td>
</tr>
<tr>
<td>Travel (flights, hotels, etc)</td>
<td>52%</td>
</tr>
<tr>
<td>Event tickets</td>
<td>37%</td>
</tr>
<tr>
<td>Home furnishings / appliances</td>
<td>26%</td>
</tr>
<tr>
<td>Car</td>
<td>22%</td>
</tr>
<tr>
<td>Personal trainer or gym membership</td>
<td>20%</td>
</tr>
<tr>
<td>Home renovation or improvements</td>
<td>19%</td>
</tr>
<tr>
<td>House</td>
<td>15%</td>
</tr>
<tr>
<td>Recreational equipment</td>
<td>13%</td>
</tr>
<tr>
<td>Entertainment subscriptions</td>
<td>13%</td>
</tr>
<tr>
<td>Investments like stocks and bonds</td>
<td>13%</td>
</tr>
<tr>
<td>Elective surgery</td>
<td>9%</td>
</tr>
</tbody>
</table>
How comfortable would you be doing the following?

People are most uncomfortable attending concerts and sporting events, as well as going back to other activities where they must share a physical space, like taking a flight or riding public transportation. They feel most comfortable shopping, though over half said they still felt uncomfortable going to a retail store.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Uncomfortable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attending a live sporting event</td>
<td>79%</td>
</tr>
<tr>
<td>Attending a live concert</td>
<td>78%</td>
</tr>
<tr>
<td>Riding public transportation</td>
<td>77%</td>
</tr>
<tr>
<td>Going on a flight</td>
<td>75%</td>
</tr>
<tr>
<td>Going to the gym</td>
<td>71%</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>68%</td>
</tr>
<tr>
<td>Playing team sports (e.g. basketball)</td>
<td>68%</td>
</tr>
<tr>
<td>Attending an in-person training or conference</td>
<td>66%</td>
</tr>
<tr>
<td>Staying in a hotel or motel</td>
<td>62%</td>
</tr>
<tr>
<td>Attending a religious service</td>
<td>60%</td>
</tr>
<tr>
<td>Voting at a polling place</td>
<td>58%</td>
</tr>
<tr>
<td>Going to a retail store (non-grocery)</td>
<td>51%</td>
</tr>
<tr>
<td>Going to a grocery store</td>
<td>38%</td>
</tr>
</tbody>
</table>
What would need to happen for you to feel comfortable attending a live concert, sporting event, or conference right now?

79% said they would be uncomfortable attending a sporting event
78% said they would be uncomfortable attending a live concert
66% said they would be uncomfortable attending a live conference

After public health officials say it’s safe, and a treatment or vaccine for the virus is readily available, people want to see a few other things happen before they feel comfortable attending a live concert, sporting event or conference:

1. Social distancing established and enforced—39%
2. Mandatory mask-wearing—36%
3. Assigned seating with attendees kept at a safe distance—33%
4. Temperature checks done on all people entering the event—29%

Of those who reported regularly attending sporting events, 24% said they were unlikely to do so in the foreseeable future, even once regular activities return. Of those who reported regularly attending live concerts, 26% said they were unlikely to do so in the foreseeable future.
What would need to happen for you to feel comfortable eating at a restaurant right now?

68% said they would feel uncomfortable eating at a restaurant

After public health officials say it’s safe, and a treatment or vaccine for the virus is readily available, people want to see a few other things happen before they feel comfortable eating at a restaurant:

1. Tables are separated by a safe distance—36%
2. Social distancing is established—36%
3. Servers and staff are wearing gloves and masks—33%
4. Temperature checks are done on all people entering the restaurant—21%

Of those who said they regularly ate at restaurants, 16% said they were unlikely to do so in the foreseeable future even once regular activities resume.
What would need to happen for you to feel comfortable going to a polling place?

60% said they would be uncomfortable voting at a polling place.

After public health officials say it’s safe, people want to see a few other things happen before they feel comfortable voting at a polling place:

1. Masks are mandatory for everyone—33.5%
2. Social distancing is established and can be easily enforced (maintaining 6 feet of distance between people)—32.7%
3. Booths are sanitized between every voter—32.2%
4. Temperature checks are done on all people involved—22%
What would need to happen for you to feel comfortable going on a flight or riding on public transit:

- **75%** said they would feel uncomfortable going on a flight
- **77%** said they would feel uncomfortable riding public transportation

After public health officials say it’s safe, and a treatment or vaccine for the virus is readily available, people want to see a few other things happen before they feel comfortable going on a flight or riding public transit:

1. **Masks are mandatory for every passenger**—39.8%
2. **Seating is assigned with passengers spaced at least 6 ft apart**—38.2%
3. **Boarding and unloading passengers are done in ways that maintain separation**—36.9%
4. **Temperature checks are done on everyone before they board**—31.5%

Of those who said they regularly flew, **20%** said they were unlikely to do so in the foreseeable future, even once regular activities resume.
Demographics & Representation
Demographics & Representation

This study was conducted April 27 - 28 among n=2,003 adults in the United States.

Respondents by region:
- South — 30%
- Northeast — 28%
- West —22%
- Midwest — 20%

Respondents by gender:
- Female: 60%
- Male: 40%

Note: Responses weighted in analysis to represent a 50/50 split between genders with no statistically significant skews.

Respondents by employment status:
- Working Full time: 69%
- Working part time: 17%
- Not working, laid-off or furloughed: 10%
- Self employed: 2%
- Not working, other: 2%