

THE GLOBAL WORKFORCE'S PERSPECTIVES ON AND EXPECTATIONS FOR RETURNING TO WORK

Understanding how employees across the world feel about working in buildings during and after the pandemic.

In late 2020, Honeywell conducted a study with Wakefield Research on workers' perceptions of and feelings about the health and safety of their workplaces. The study surveyed 2,000 workers across the United States, United Kingdom, Germany and the Middle East, who typically work in buildings with 500 or more employees.

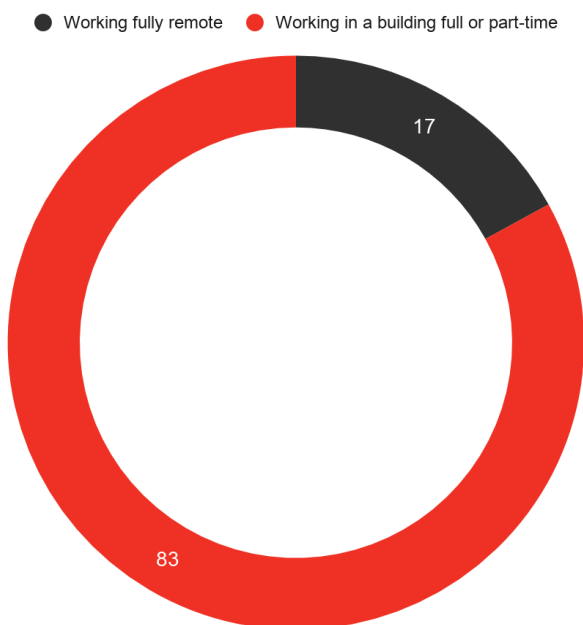
The research shows a staggering majority of the global workforce does not feel completely safe in their employer's buildings today. The party that workers believe should do more for ensuring their safety differs in markets surveyed — their company or building management — as well as what they see as the biggest threat to their safety. This report explores these perceptions on a global level, as well as within specific countries, and types of buildings. It also sheds light into the type of measures surveyed workers deem critical to making them feel safer as they return back to their work locations.

"Workers are keenly attuned to what's happening to make their workspaces safer and healthier, especially aspects like air quality and adherence to safety guidelines, which wasn't previously a concern for some people," said Vimal Kapur, president and CEO of Honeywell Building Technologies. "Air quality, for example, is not something that will be dismissed once we're on the other side of this pandemic — it will be essential to the occupant experience — and help make workers feel more comfortable as they return back to their offices."

HOW DO WORKERS FEEL ABOUT THEIR WORK ENVIRONMENTS?

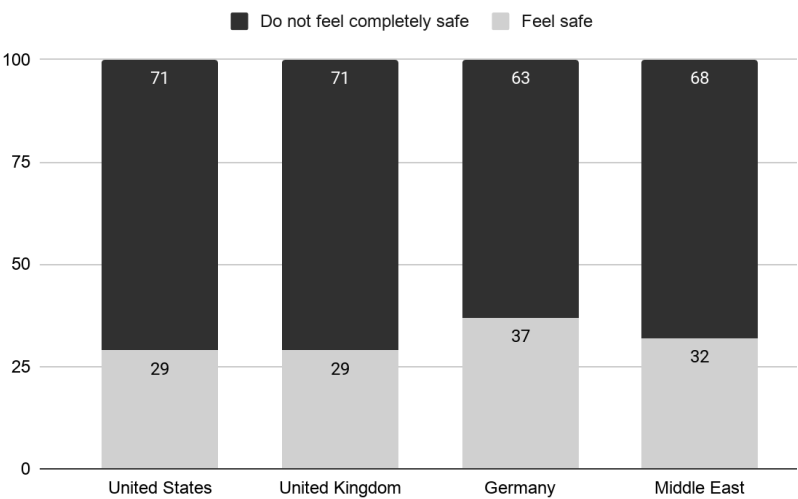
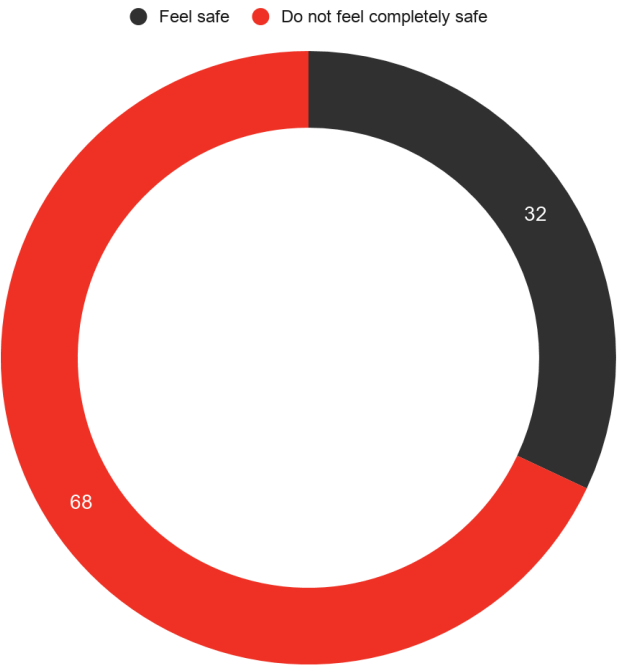
While 83% of all respondents have continued to work inside a building either full or part time...

Of those working in a building, only 54% think their building management has taken the steps necessary to keep them safer on the job.

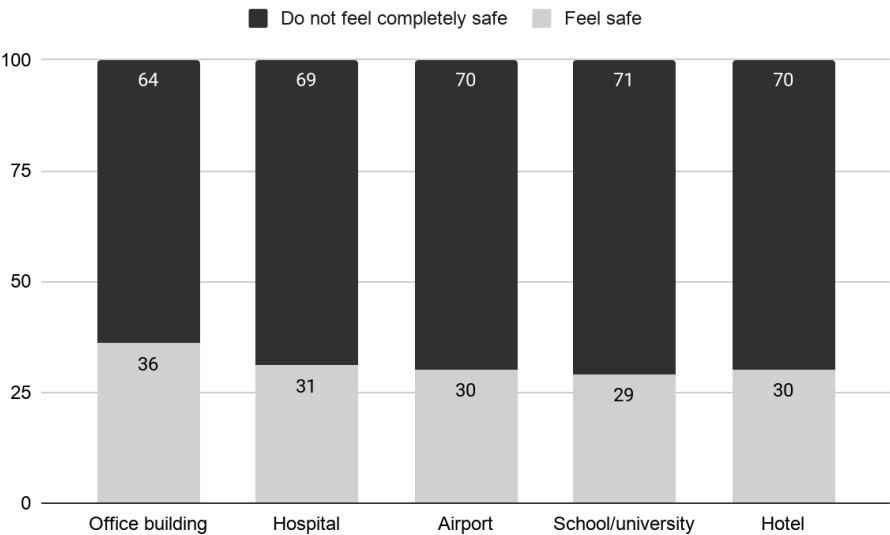


68% do not feel completely safe inside their building today.

This sentiment is even stronger among surveyed remote workers, with 75% stating they do not feel completely safe returning to working in a building.

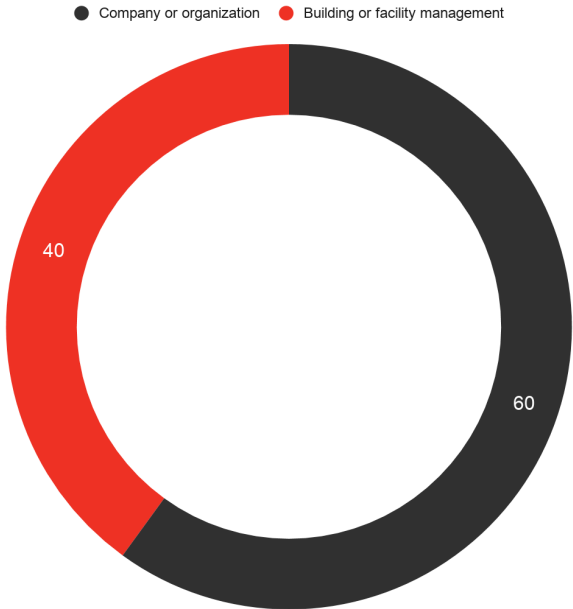


Globally, office buildings are viewed as more safe than school or university buildings.

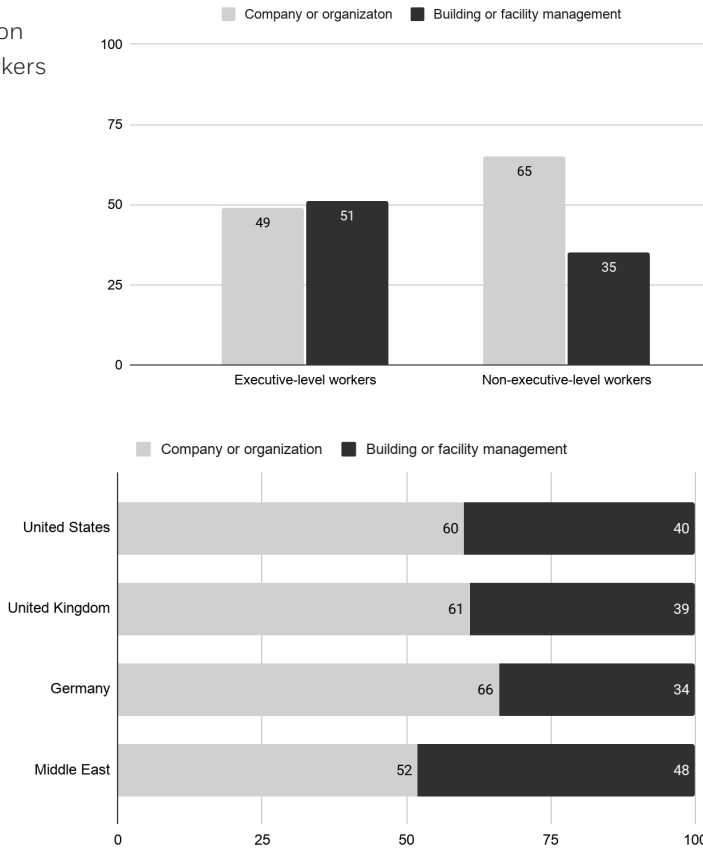


Overall, respondents believe their company or organization should do more for their safety, but two in five believe it is the responsibility of their building or facility management.

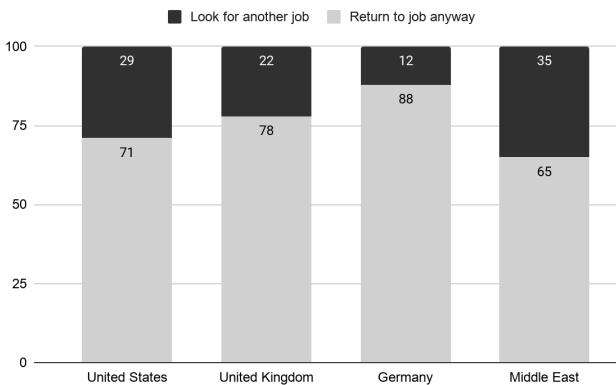
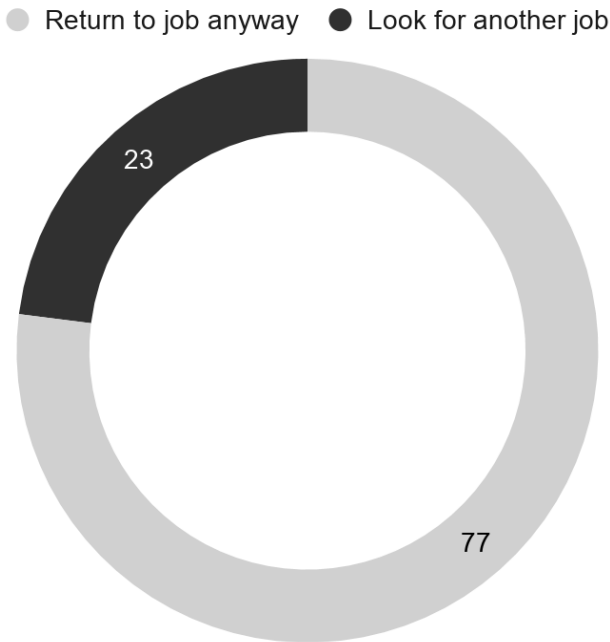
While in general surveyed workers view their company or organization as responsible for making their workplace safer, executive-level workers place more responsibility on building or facility management.



Where responsibility for building safety lies

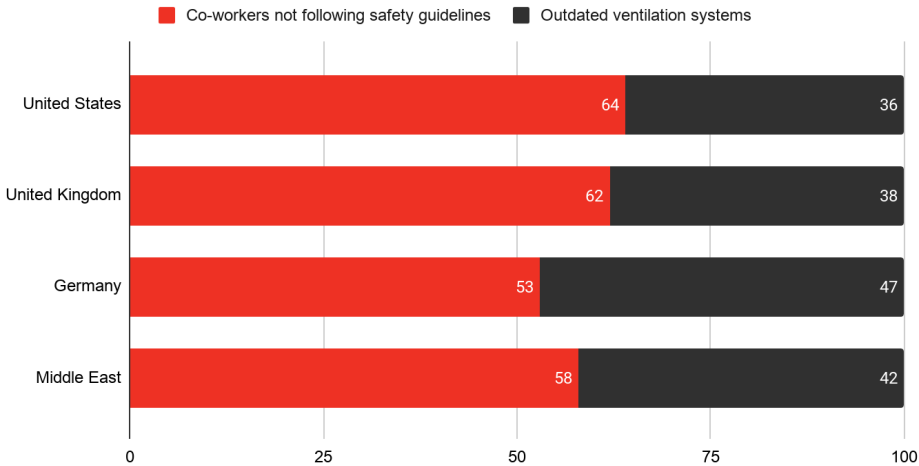
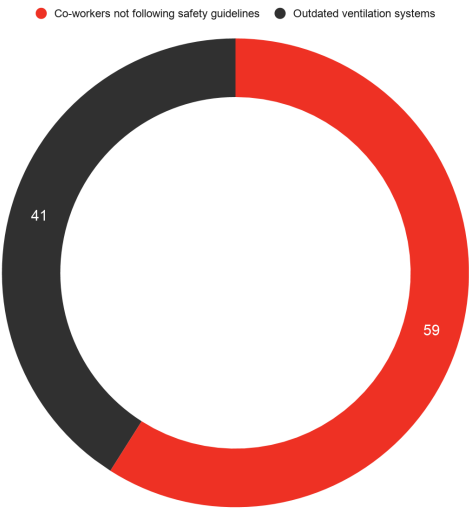


Nearly a quarter of surveyed remote workers would look for another job before returning on site if necessary health and safety measures are not implemented.

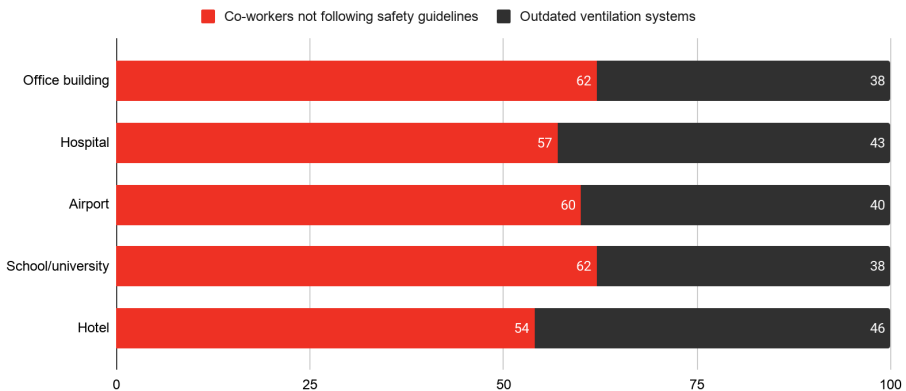


WHAT ARE THEY WORRIED ABOUT?

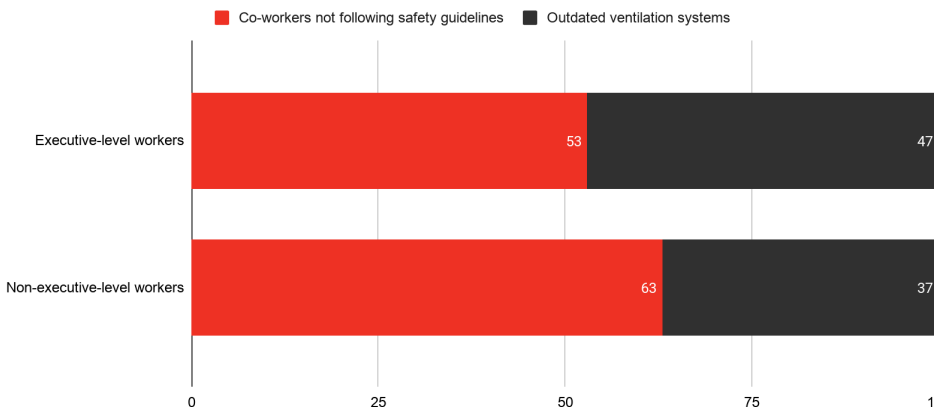
Overall, surveyed workers see co-workers not following safety guidelines as the bigger threat, but roughly two in five see outdated ventilation systems as the bigger threat.



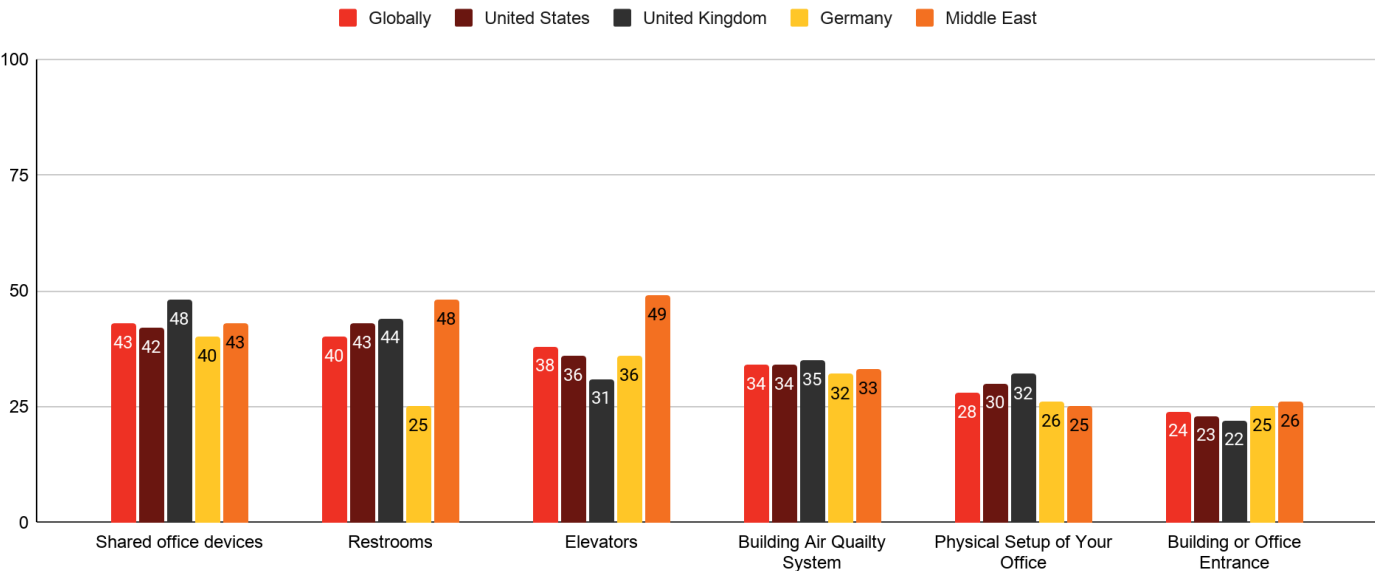
Outdated ventilation systems are a bigger concern for the hotel workers surveyed (46%) compared to workers in office buildings (38%) or schools/universities (38%).



Respondents at the executive-level are more concerned about other employees not following safety guidelines than outdated ventilation systems.



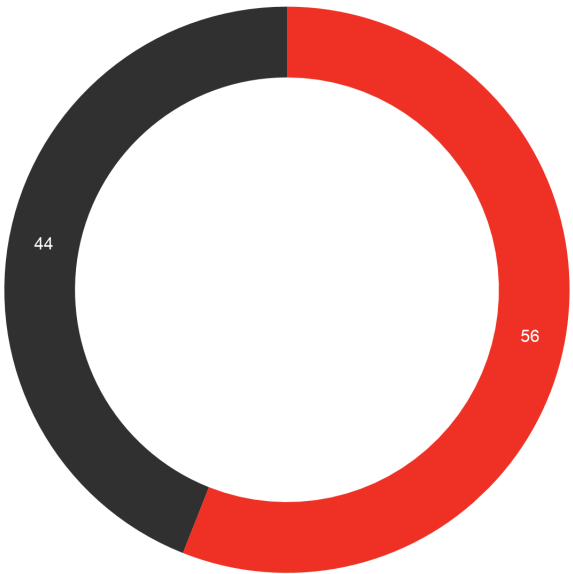
When asked about their workplace’s physical attributes, respondents were likewise divided on what they would deem the biggest health and safety risk.



Globally, respondents are most concerned about shared office devices, with 43% of respondents listing that as their biggest perceived risk.

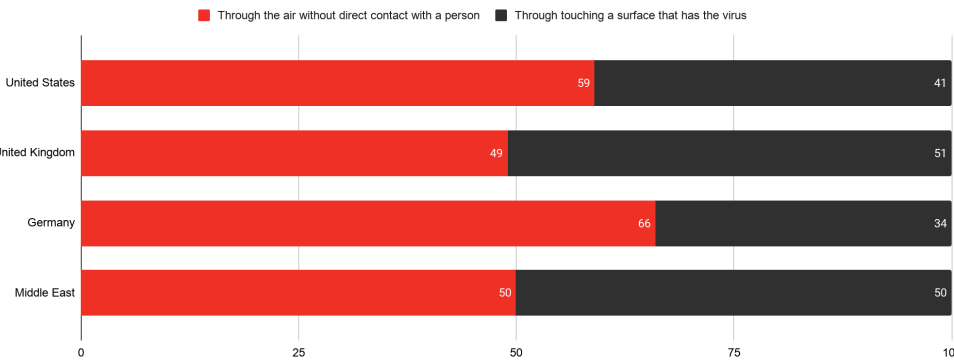
Yet, when asked whether they were more concerned about virus transmission through the air than from contact with a surface, the majority of surveyed workers globally said they were more concerned about air transmission.

● Through the air without direct contact with a person ● Through touching a surface that has the virus

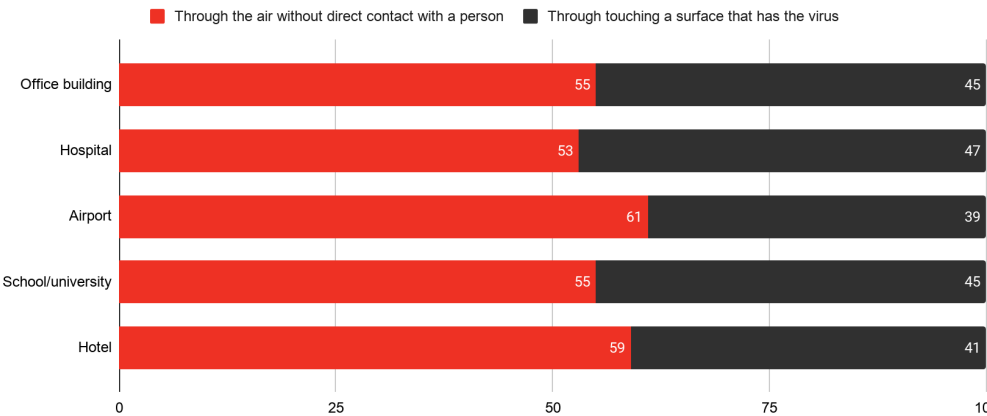


This data reveals a disconnect between what surveyed workers say concerns them more – virus transmission through air – and what they see as the biggest health risk at work: contact with shared office devices (per previous graph).

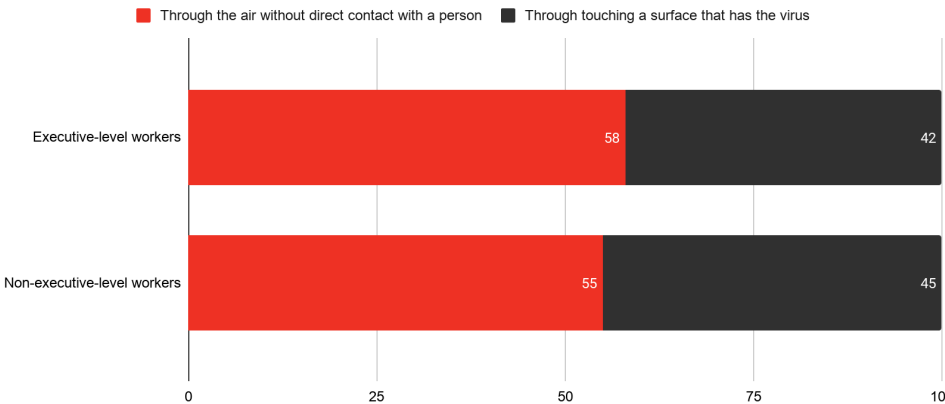
Workers in the U.K. and Middle East are as concerned with virus transmission through a surface as transmission through the air. Meanwhile, workers in the U.S. and Germany are more concerned with air transmission.



Hospitals are the only building type whose surveyed workers are split about their safety concern between air and surface transmission. In all the other buildings, surveyed workers are more concerned about air transmission.

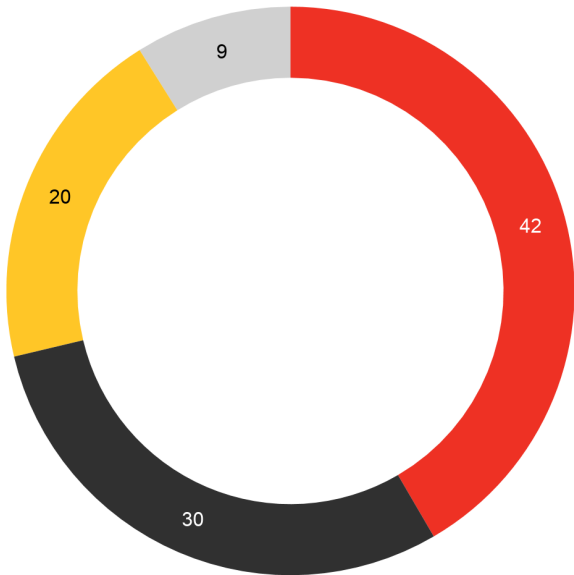


Regardless of level, there is greater concern with transmission through the air.



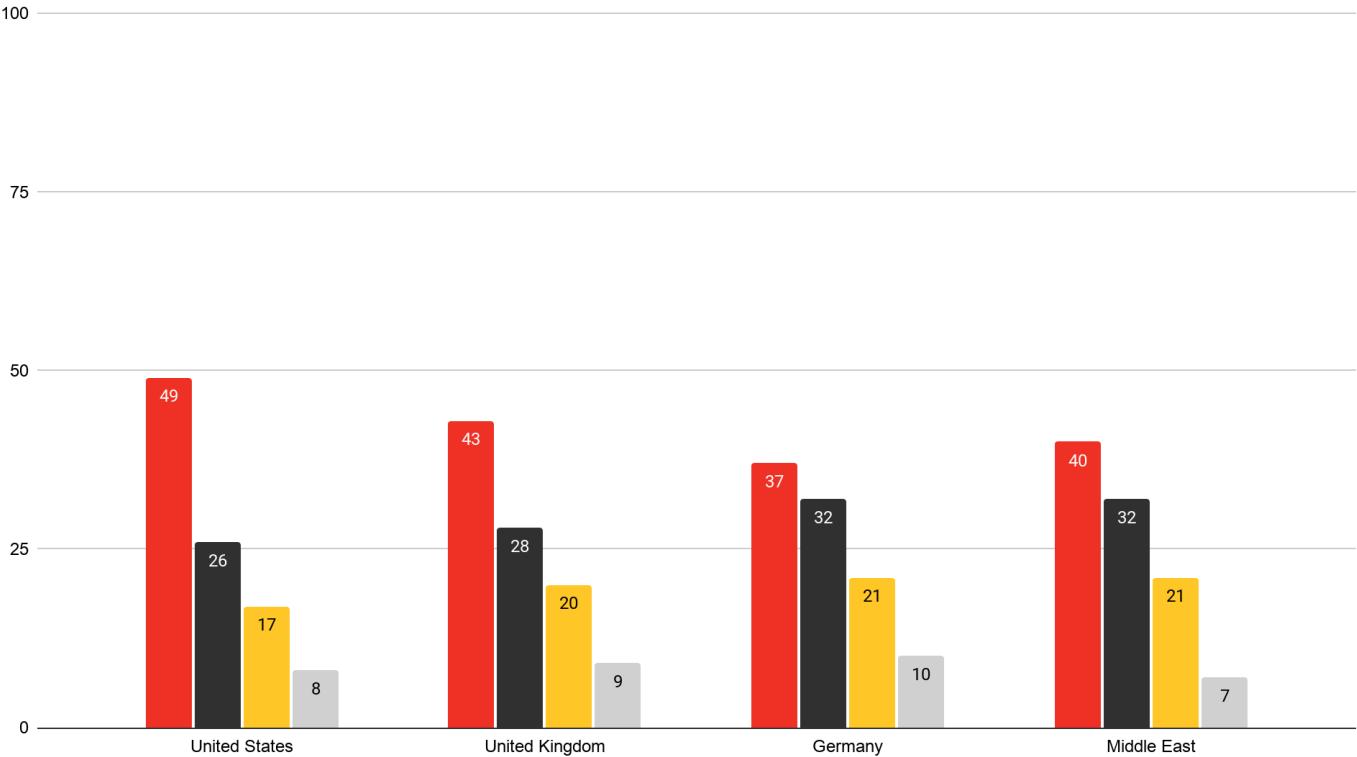
Respondents are also worried that building management will not consistently enforce health and safety guidelines.

● Enforcing health and safety guidelines ● Investing in new technology to make it safer ● Informing occupants of health risks ● None of these



U.S. respondents were most concerned about enforcing health and safety guidelines.

■ Enforcing health and safety guidelines ■ Investing in new technology to make it safer ■ Informing occupants of health risks ■ None of these



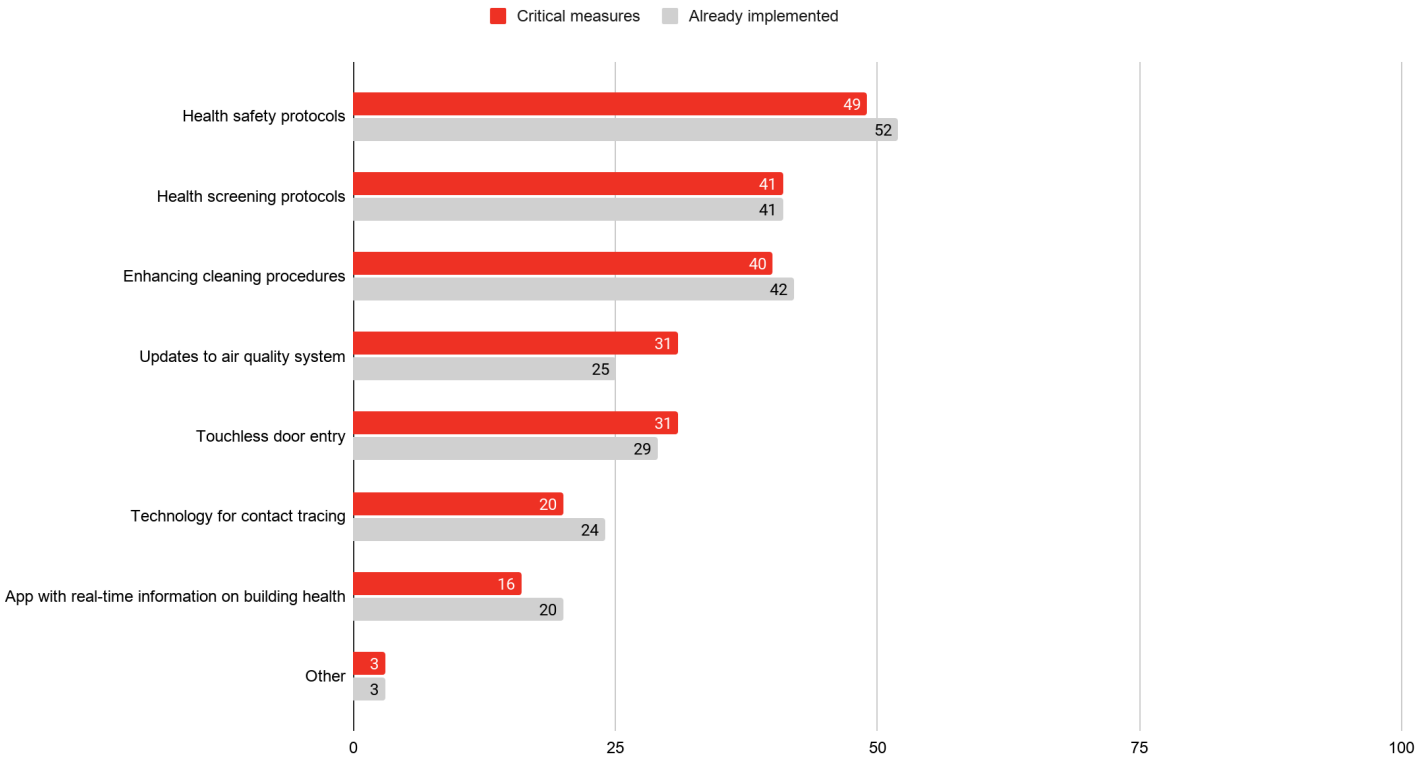
PROGRESS TO DATE

Building management has implemented some of the measures surveyed workers view as most critical to making them feel safer.

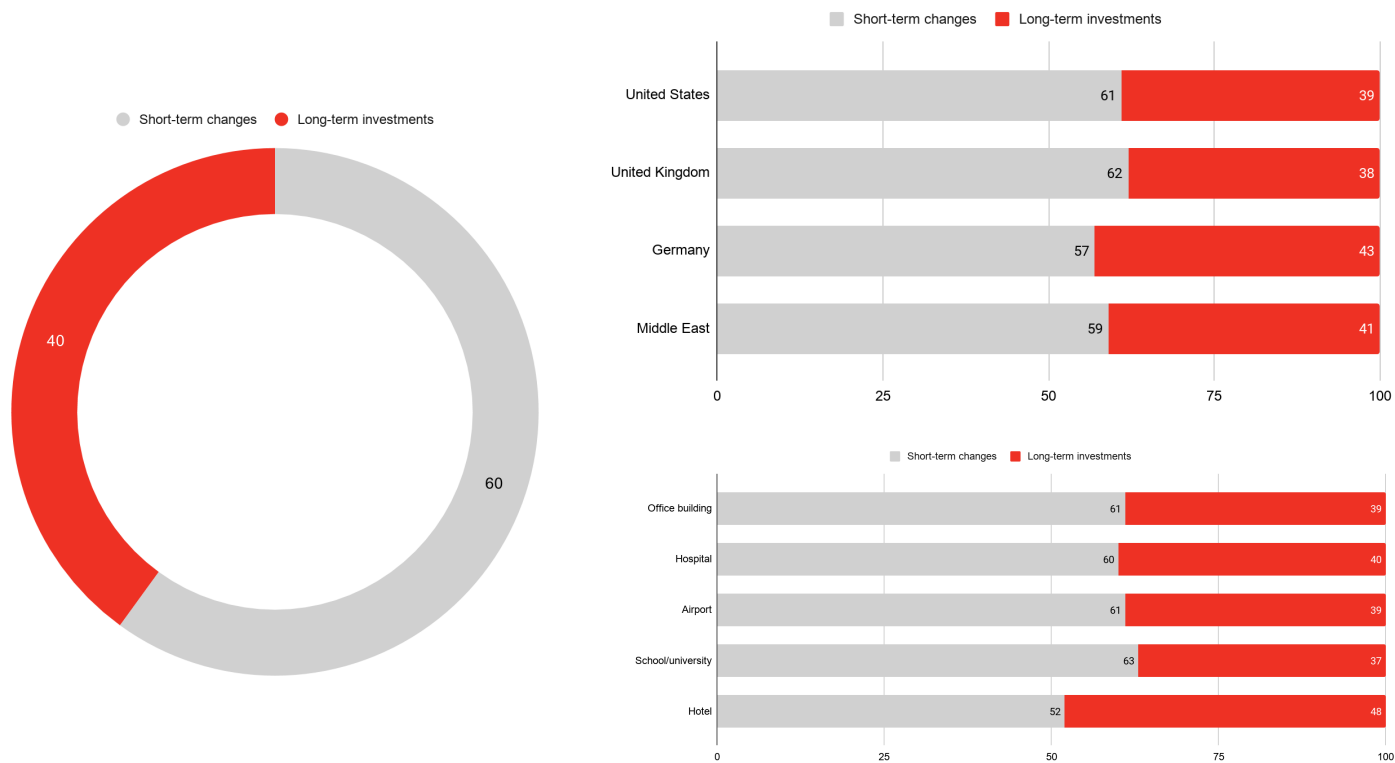
Five percent of respondents were not aware of any new safety measures within their buildings.

German respondents (37%) are more likely to view updates to air quality systems as more critical than respondents from the U.S. or U.K. (28% for each).

Buildings in the Middle East are more likely than buildings in Germany or the U.K. to have implemented enhanced cleaning procedures and touchless door entries.



More respondents believe their building will prioritize short-term changes over long-term investments.



Respondents believe schools and universities (63%) are much more likely than hotels (52%) to favor short-term solutions.

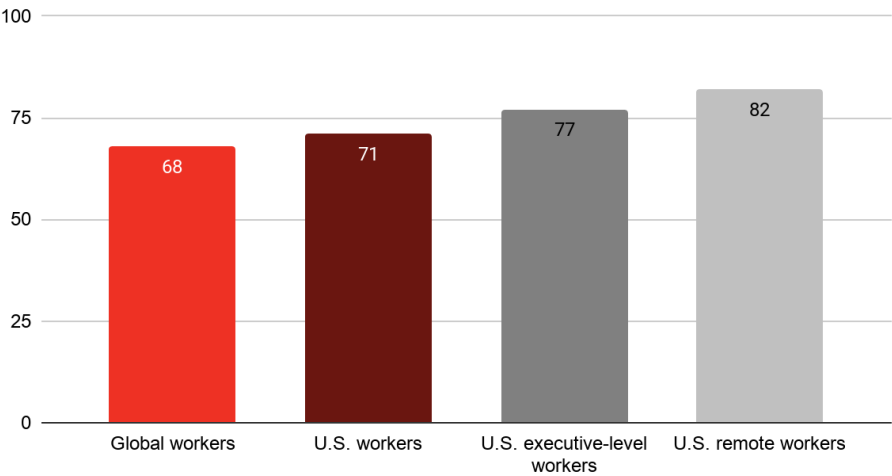
“Many facilities have made changes to their procedures but have not invested in the building itself – and respondents noticed,” continued Kapur. “Workers are going to demand more from buildings in the future, and we’re even seeing with these survey results that creating a healthier and safer environment will be differentiator to staff retention and recruiting, which may even impact long-term real estate value.”

HOW DO U.S. WORKERS FEEL ABOUT THEIR WORK ENVIRONMENTS?

As work buildings and facilities remain partly vacant, surveyed workers in the U.S. do not feel safe returning to work. Many of the surveyed workers are even willing to look for other employment opportunities before returning to unsafe buildings.

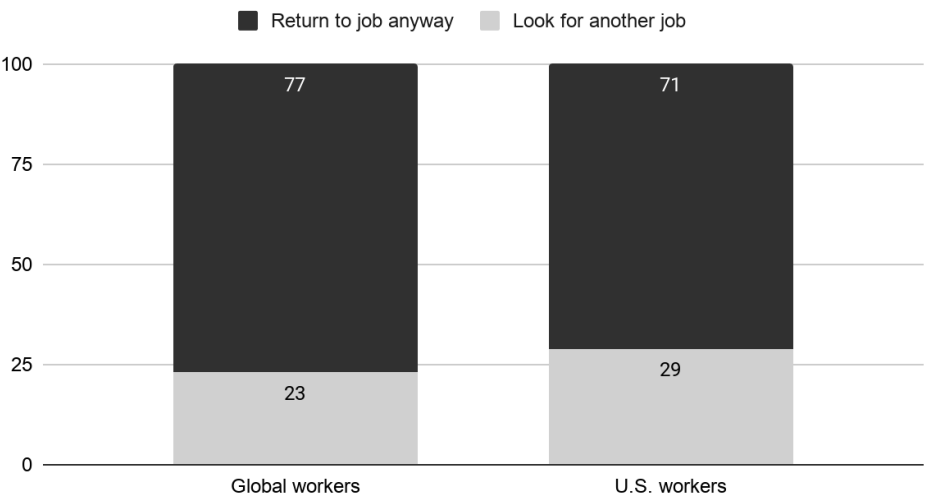
A staggering majority of the surveyed U.S. workforce (71%) does not feel completely safe working in their employer’s buildings. This number is even higher for surveyed executive-level workers (77%) and remote workers (82%), who are especially skeptical about the safety of work sites.

Percentage of workers not feeling safe in buildings



In fact, nearly three in 10 U.S. remote workers (29%) surveyed would look for a new job rather than return to a site that did not implement necessary measures.

Percentage of workers who would look for another job



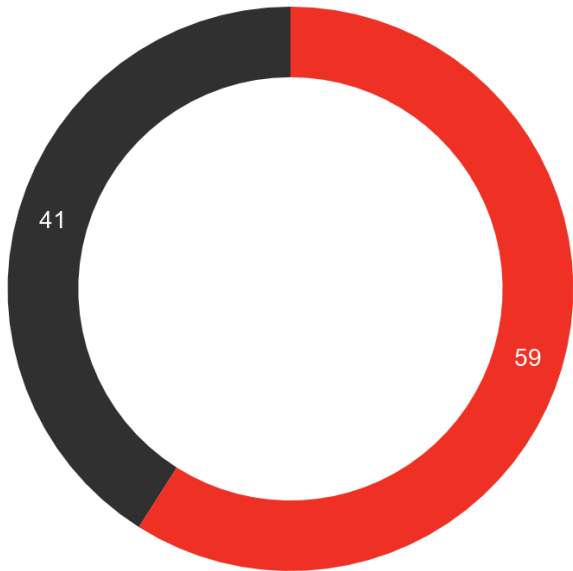
WHAT ARE THEY WORRIED ABOUT?

The surveyed U.S. workers’ concerns echo the latest scientific research on the spread of COVID-19,^{1,2} with 59% of those being more concerned about transmission through the air than through contact with a surface.

Surveyed U.S. workers who believe that their building management is not doing enough to keep them safer on the job are more likely to be concerned about air transmission (70%) than others (51%).

U.S. workers are more concerned about COVID-19 transmission

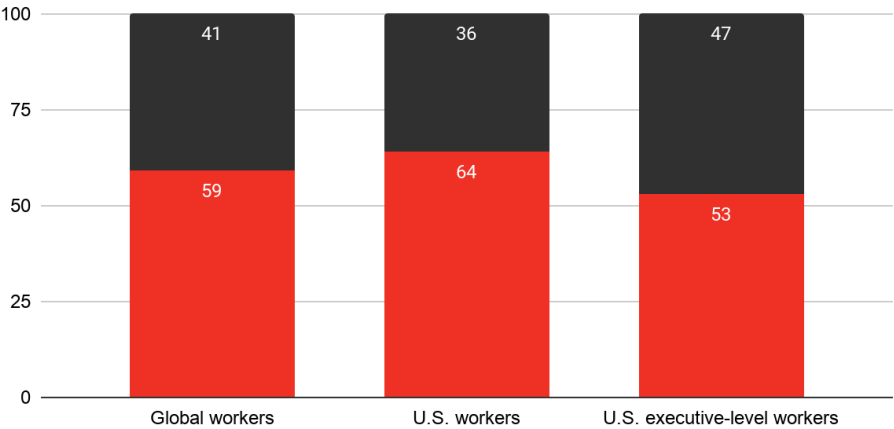
● Through the air without direct contact with a person ● Through touching a surface that has the virus



In terms of what poses a bigger threat to their safety, 64% of U.S. respondents point to co-workers not following health and safety guidelines and 36% note outdated ventilation systems. Executive-level U.S. workers are more likely to recognize the threat of poor air quality with nearly half (47%) of those surveyed indicating outdated ventilation as a bigger threat.

Biggest threat to their safety

■ Outdated ventilation systems ■ Co-workers not following health and safety guidelines

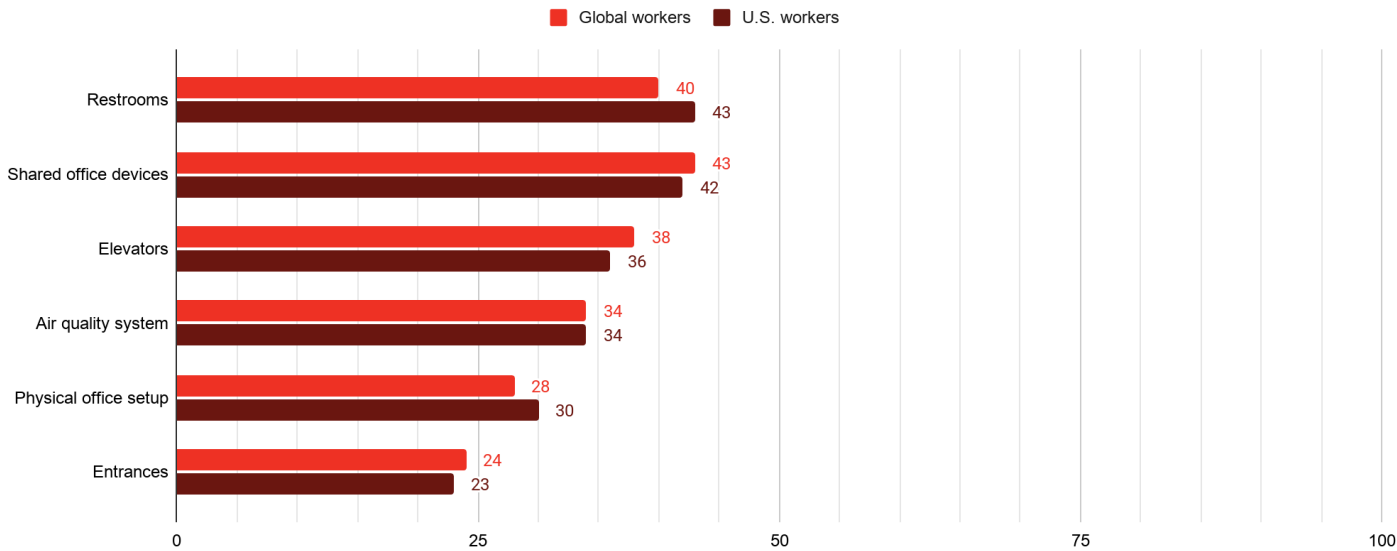


¹CDC, Scientific Brief: SARS-CoV-2 and Potential Airborne Transmission, October 5, 2020 [Accessed December 15, 2020]

²The Lancet, COVID-19 transmission—up in the air, VOLUME 8, ISSUE 12, P1159, DECEMBER 01, 2020 [Accessed December 15, 2020]

With regards to the biggest health and safety risk in their work buildings or facilities, surveyed workers in the U.S. cite restrooms (43%), shared office devices (42%), elevators (36%) and the building’s air quality system (34%).

Biggest health and safety risk in their work buildings



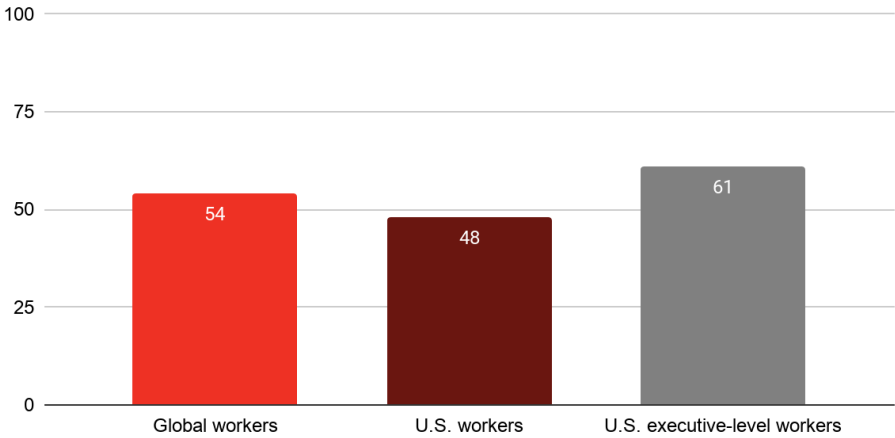
Consistent with the global findings, six in 10 U.S. respondents admit that their company or organization should be doing more to make their workplace safer during COVID-19, compared to 40% who believe the building or facility management should be doing more.

Who should be doing more to keep the workplace safer during COVID-19?



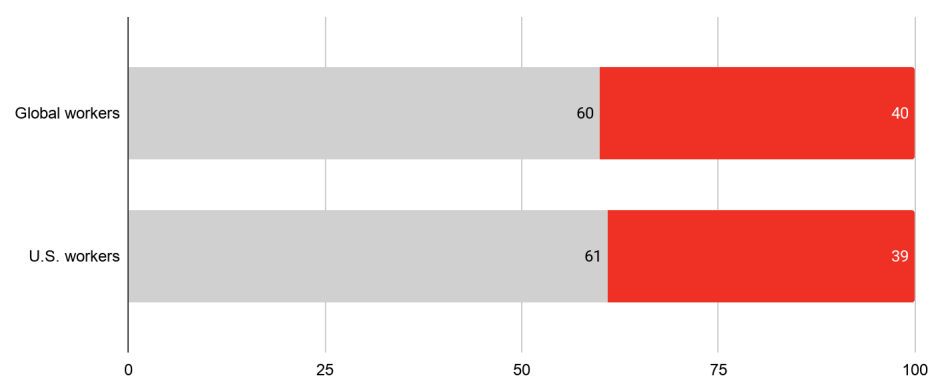
Nearly half of U.S. surveyed workers (48%) agree that their building management has not taken the steps necessary to keep them safer on the job, primarily driven by executive-level workers.

Building management has not taken the steps necessary to keep workers safer on the job



About six in 10 U.S. respondents (61%) believe their building is more likely to make short-term changes in response to the pandemic versus long-term investments in building systems.

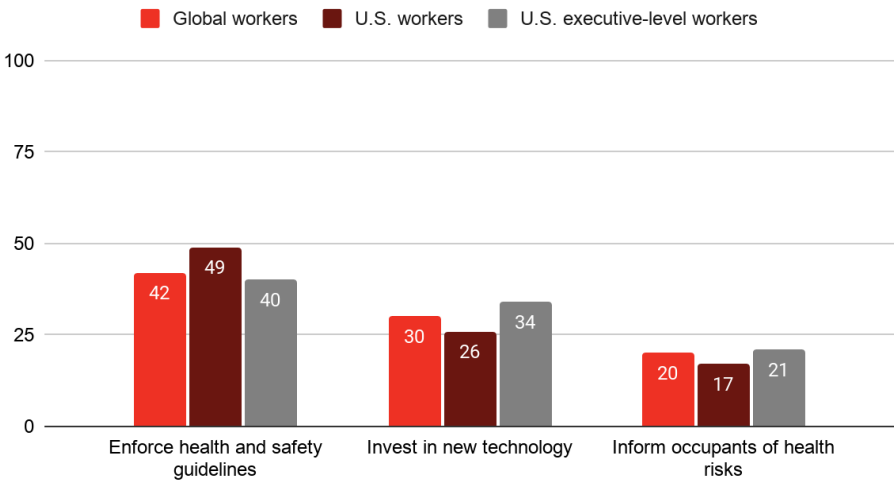
Buildings are more likely to make short-term changes



Surveyed U.S. workers are most worried that building management will not consistently enforce health and safety guidelines (49%), invest in new technology to make working in-person safer (26%), and inform occupants of health risks (17%).

Surveyed U.S. executive-level workers are even more concerned than other employees on new technology investments to make their workplace safer.

Concerns over building management’s ability to...



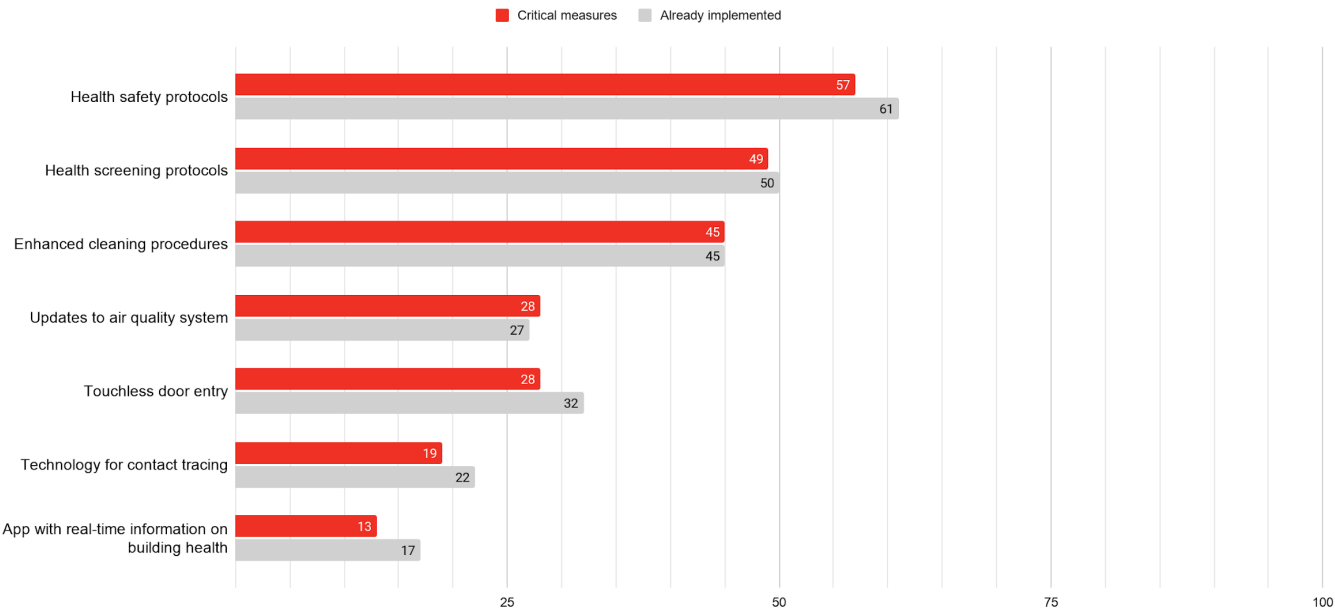
PROGRESS TO DATE

To return to work and feel safer, surveyed U.S. workers view health safety protocols such as social distancing or mandatory masks as most critical (57%), and in fact, 61% of those on site have seen such updates happen.

Other top health safety measures surveyed U.S. workers want include health screening protocols such as temperature checks (49%), enhanced cleaning procedures (45%), updated air quality systems (28%), touchless door entry (28%) and technology for contact tracing (19%).

While 27% of surveyed Americans working on site say their building has updated its air quality system, this is less common than short-term changes such as health safety protocols, health screening protocols and enhanced cleaning procedures.

Measures to make U.S. workers feel safer

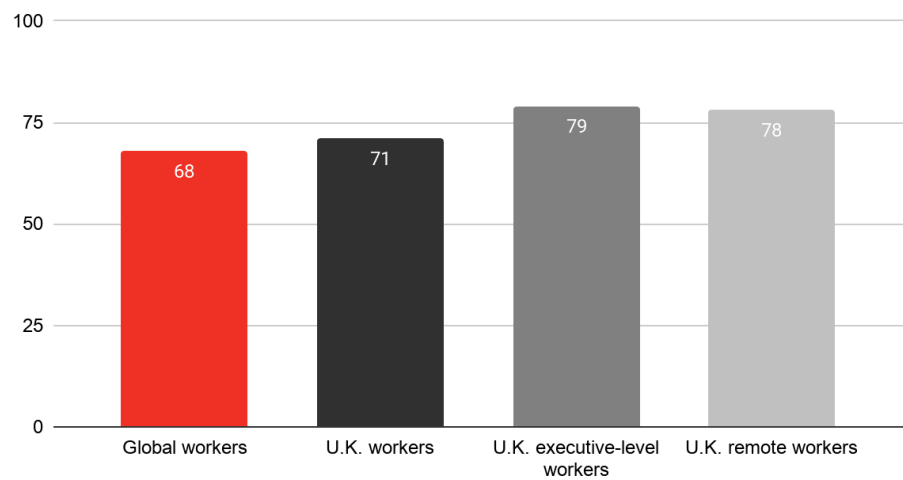


HOW DO U.K. WORKERS FEEL ABOUT THEIR WORK ENVIRONMENTS?

Consistent with the global findings, surveyed workers in the U.K. do not feel safe returning to work and many are willing to quit their jobs before returning to unsafe working environments.

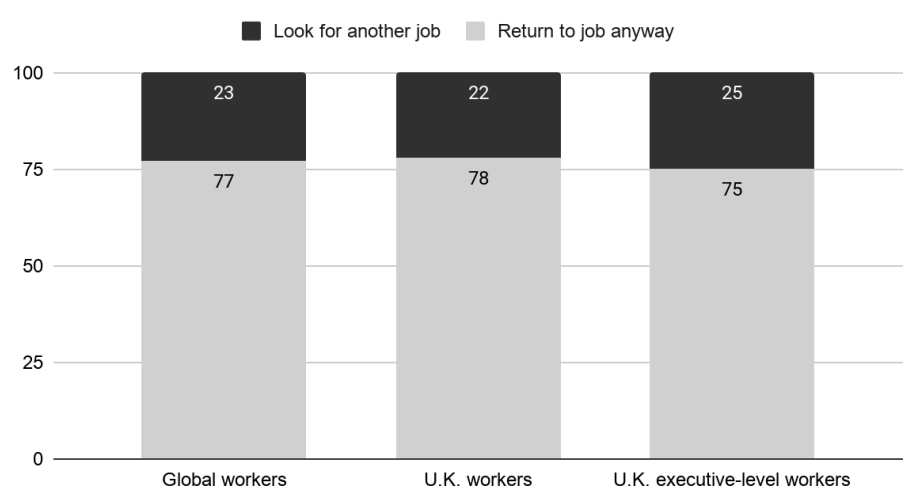
An overwhelming majority of the U.K. workforce surveyed (71%) does not feel completely safe working in their employer’s buildings. This number is even higher for surveyed executive-level workers (79%) and remote workers (78%), who are especially skeptical about the safety of worksites.

Percentage of workers not feeling safe in buildings



In fact, more than one in five U.K. remote workers (22%) would look for a new job rather than return to a site that did not implement necessary measures.

Percentage of workers who would look for another job



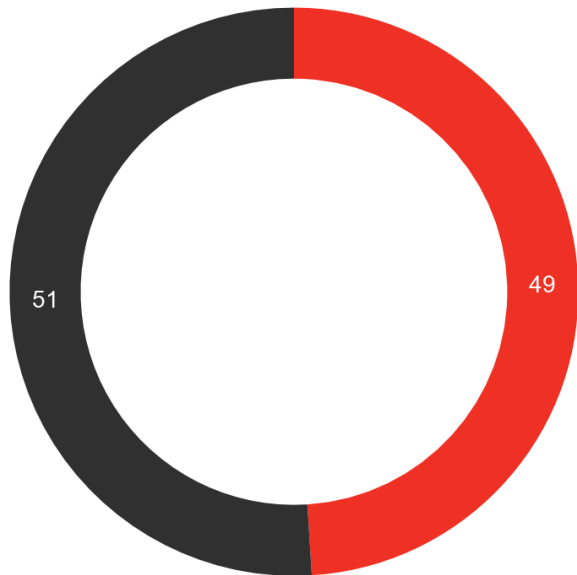
*The sample size for executive workers who are remote is small (n=12).

WHAT ARE THEY WORRIED ABOUT?

The surveyed U.K. workers are equally concerned about COVID-19 transmission through the air (49%) and through contact with a surface (51%).

U.K. workers are more concerned about COVID-19 transmission

● Through the air without direct contact with a person ● Through touching a surface that has the virus

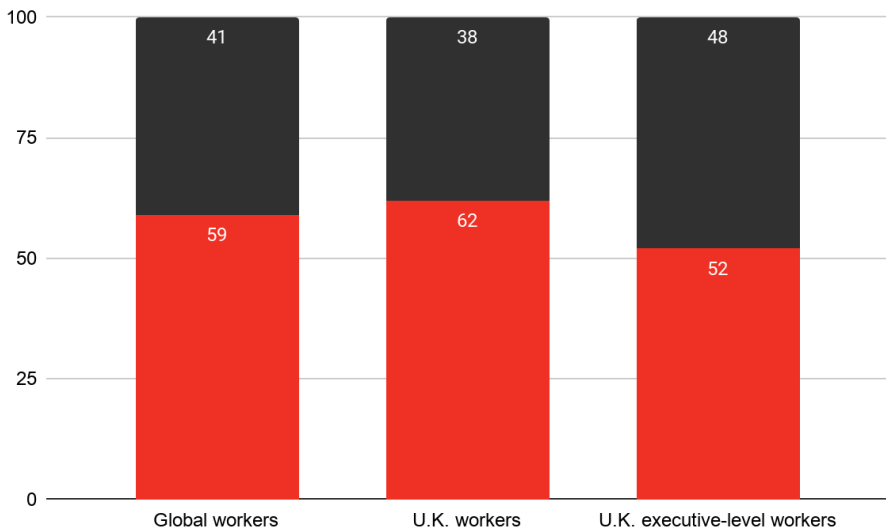


U.K. Respondents who believe that their building management is not doing enough to keep them safer on the job are more likely to be concerned about air transmission (56%) than others (36%).

In terms of what poses a bigger threat to their safety, 62% of U.K. respondents point to co-workers not following health and safety guidelines and 38% note outdated ventilation systems. Executive-level U.K. workers are more likely to recognize the threat of poor air quality with nearly a half (48%) of those surveyed indicating outdated ventilation as a bigger threat.

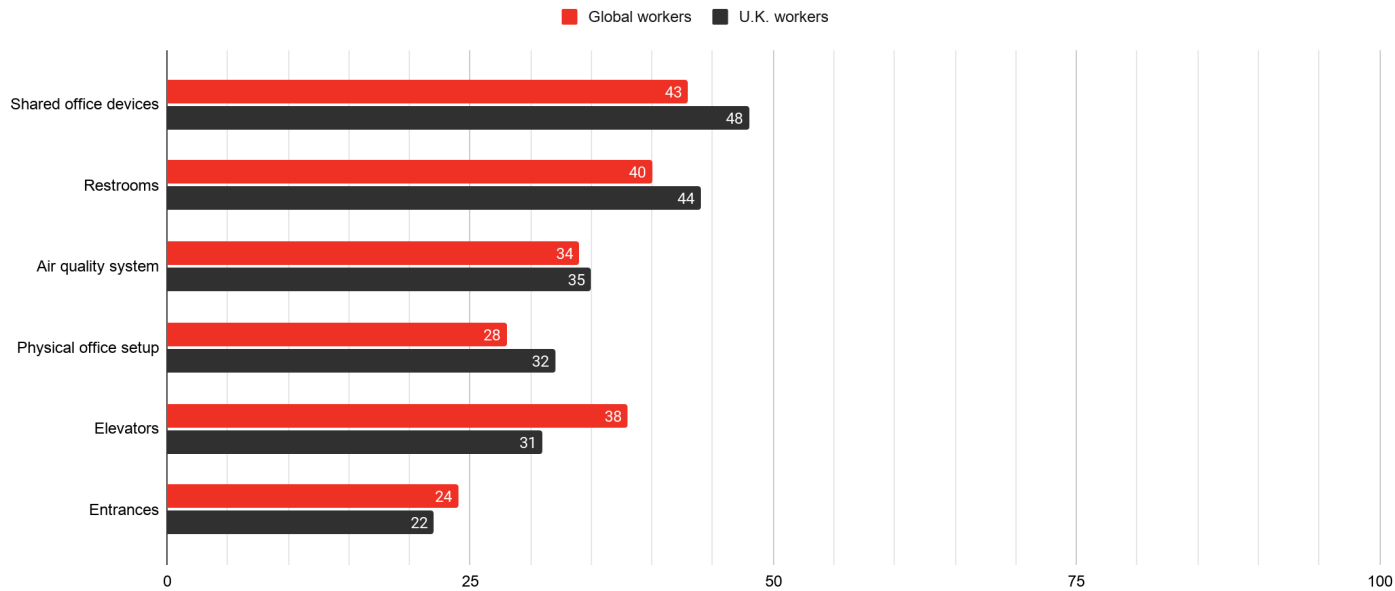
Biggest threat to their safety

■ Outdated ventilation systems ■ Co-workers not following health and safety guidelines



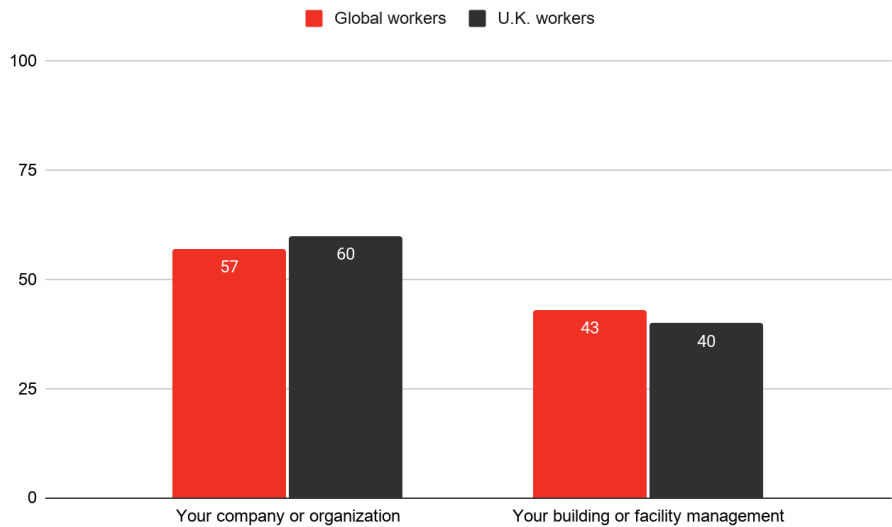
With regards to the biggest health and safety risk in their work buildings or facilities, surveyed workers in the U.K. cite shared office devices (48%), restrooms (44%) and the building's air quality system (35%).

Biggest health and safety risk in their work buildings



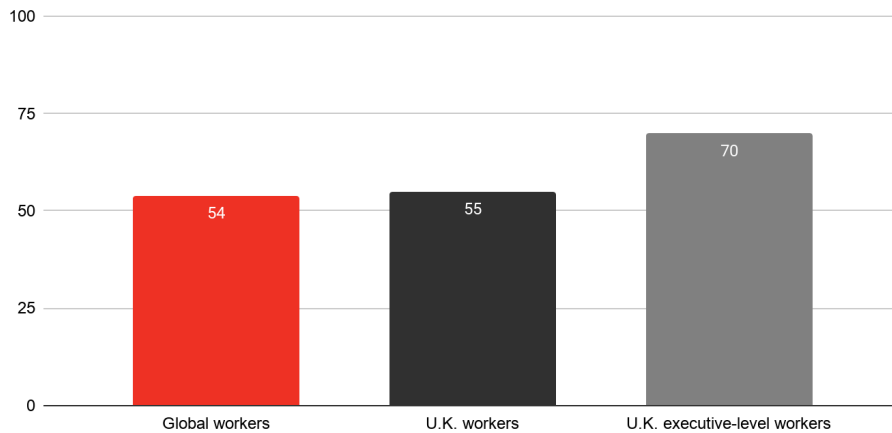
More than six in 10 U.K. respondents (61%) admit that their company or organization should be doing more to make their workplace safer during COVID-19, compared to 39% who believe the building or facility management should be doing more.

Who should be doing more to keep the workplace safer during COVID-19?



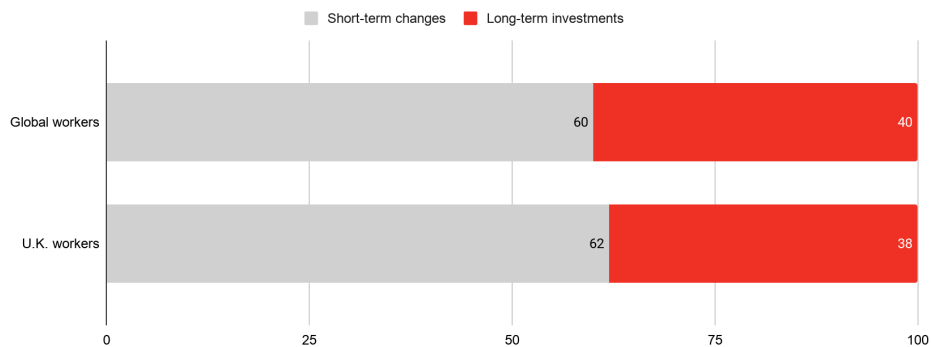
More than half of U.K. surveyed workers (55%) agree that their building management has not taken the steps necessary to keep them safer on the job, primarily driven by executive-level workers (70%).

Building management has not taken the steps necessary to keep workers safer on the job



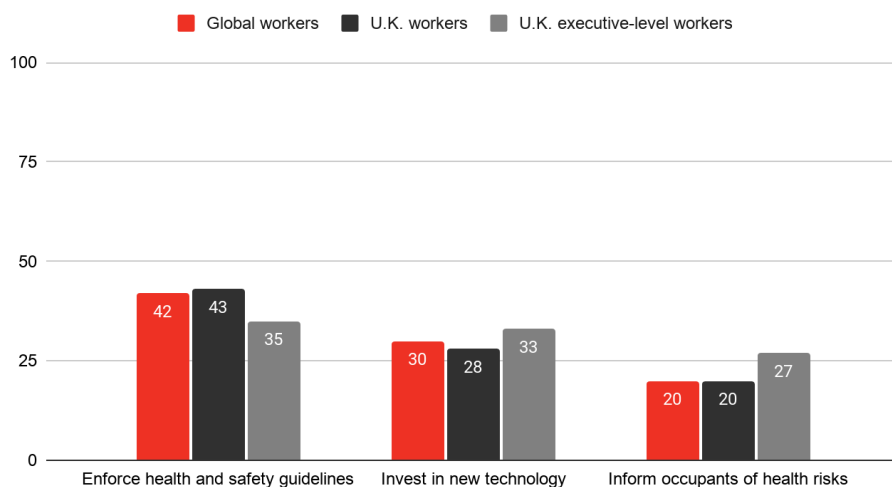
More than six in 10 (62%) of surveyed U.K. workers believe their building is more likely to make short-term changes in response to the pandemic versus long-term investments in building systems.

Buildings are more likely to make short-term changes



Surveyed U.K. workers are most worried that building management will not consistently enforce health and safety guidelines (43%), invest in new technology to make working in-person safer (28%) and inform occupants of health risks (20%). Surveyed executive-level U.K. workers have even bigger concerns (95% have concerns, compared to 88% of other employees), especially on whether building management will inform occupants of health risks.

Concerns over building management's ability to...



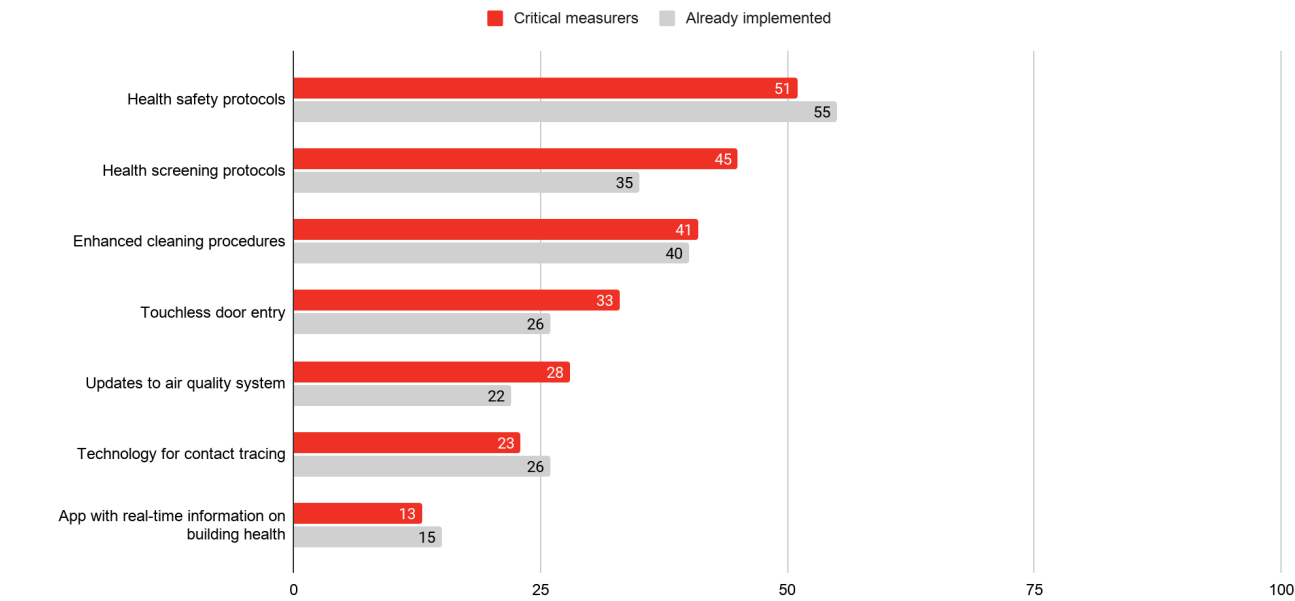
PROGRESS TO DATE

To return to work and feel safer, surveyed U.K. workers view health safety protocols such as social distancing or mandatory masks as most critical (51%), and in fact, 55% of those working on site have seen such updates happen.

Other top health safety measures surveyed U.K. workers want include health screening protocols such as temperature checks (45%), enhanced cleaning procedures (41%), touchless door entry (33%), updated air quality systems (28%) and technology for contact tracing (23%).

While 22% of U.K. respondents working on site say their building has updated its air quality system, this is less common than short-term changes such as health safety protocols, health screening protocols and enhanced cleaning procedures.

Measures to make U.K. workers feel safer

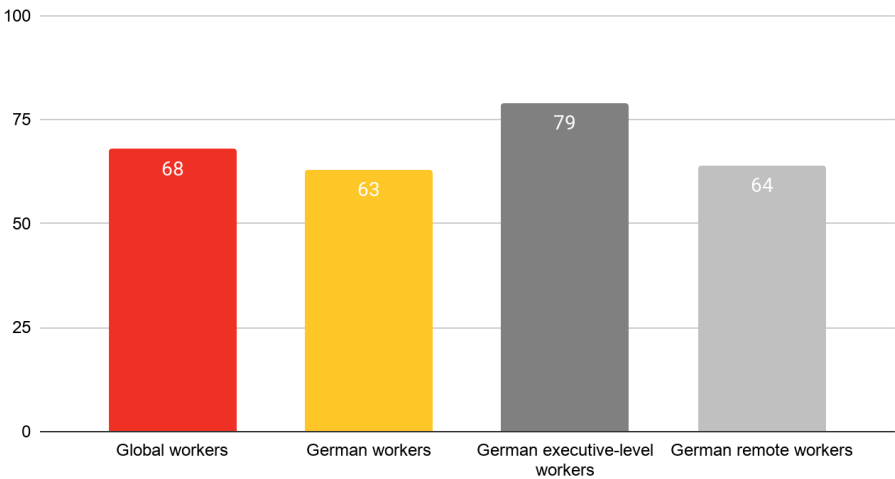


HOW DO GERMAN WORKERS FEEL ABOUT THEIR WORK ENVIRONMENTS?

Although Germany has the highest number of surveyed workers working in a building full time (66%), surveyed workers in the market do not feel completely safe working on site and view updates to air quality systems as a top safety measure that would make them feel more comfortable.

A sizable portion of the surveyed German workforce (63%) does not feel completely safe working in their employer’s buildings. This number is even higher for surveyed executive-level workers (79%), who are especially skeptical about the safety of work sites.

Percentage of workers not feeling safe in buildings

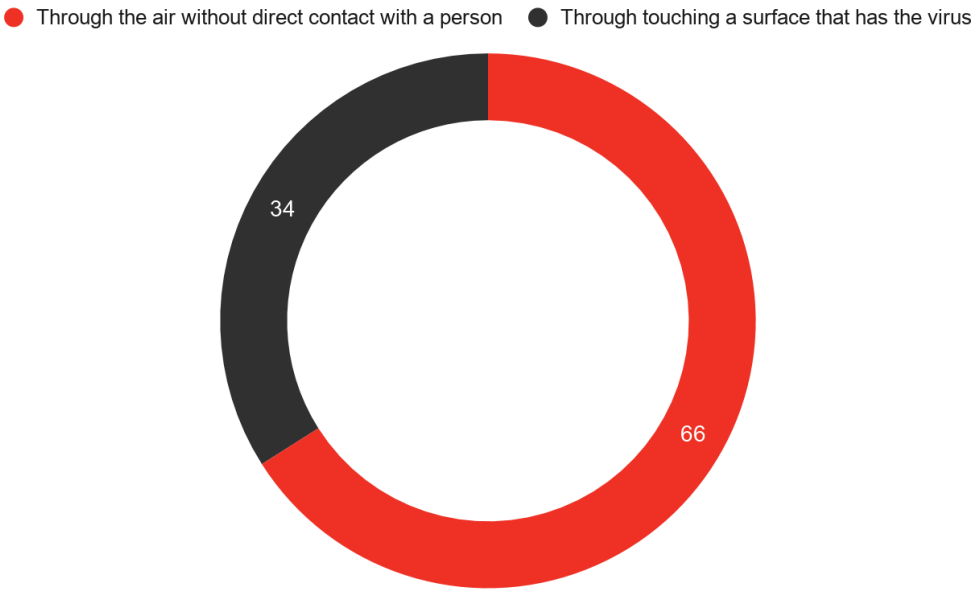


*Note: The sample size for remote workers is small (n=84).

WHAT ARE THEY WORRIED ABOUT?

A large majority (66%) of the surveyed German workforce is more concerned about transmission through the air than through contact with a surface, compared to 56% globally.

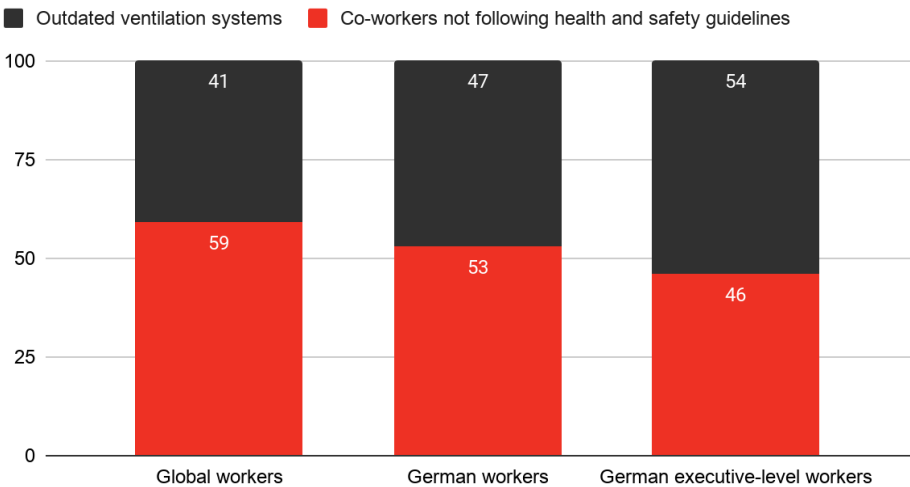
German workers are more concerned about COVID-19 transmission



German respondents who believe that their building management is not doing enough to keep them safer on the job are even more likely to be concerned about air transmission (74%) than others (57%).

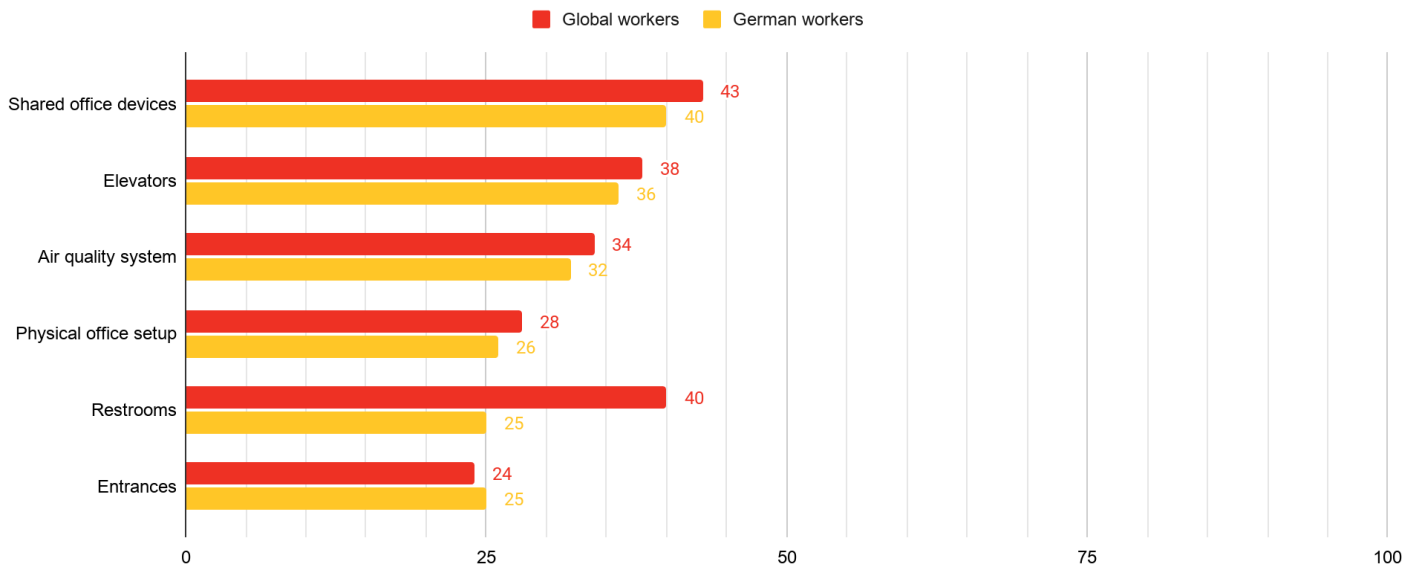
In terms of what poses a bigger threat to their safety, 53% of German respondents point to co-workers not following health and safety guidelines and 47% note outdated ventilation systems. Executive-level German workers are more likely than other employees to recognize the threat of poor air quality with more than half (54%) of those surveyed indicating outdated ventilation as a bigger threat.

Biggest threat to their safety



With regards to the biggest health and safety risk in their work buildings or facilities, surveyed workers in Germany cite shared office devices (40%), elevators (36%) and the building's air quality system (32%).

Biggest health and safety risk in their work buildings



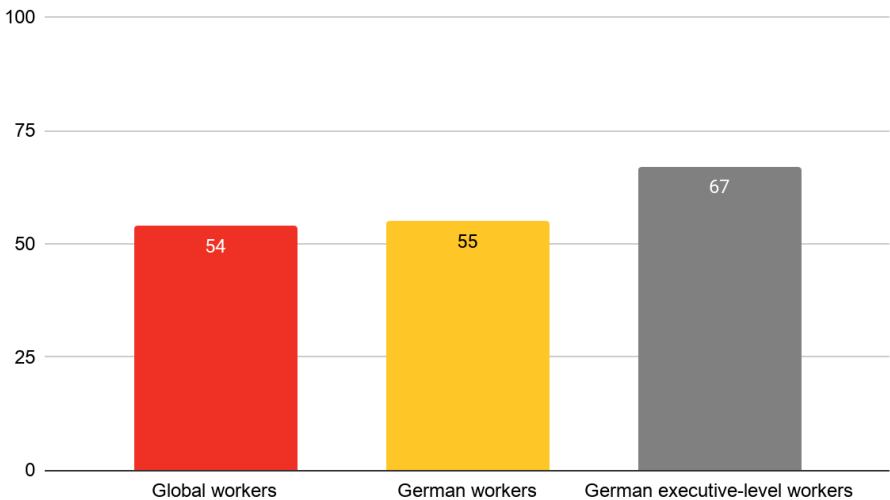
Two-thirds of German respondents (66%) admit that their company or organization should be doing more to make their workplace safer during COVID-19, compared to 34% who believe the building or facility management should be doing more.

Who should be doing more to keep the workplace safer during COVID-19?



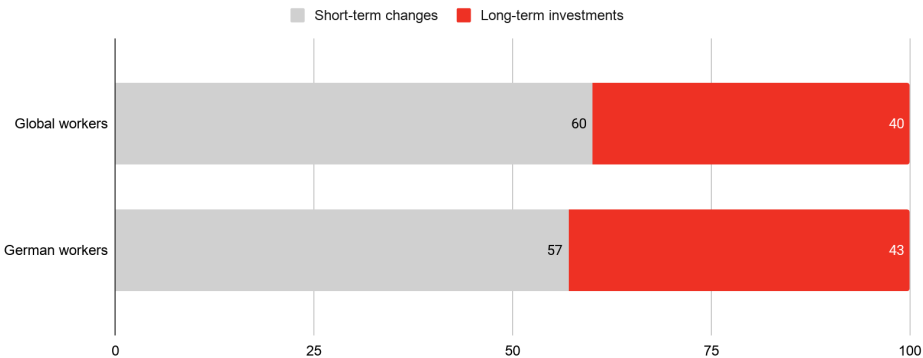
More than half of German surveyed workers (55%) agree that their building management has not taken the steps necessary to keep them safer on the job, primarily driven by executive-level workers (67%).

Building management has not taken the steps necessary to keep workers safer on the job



Nearly three in five German respondents (57%) believe their building is more likely to make short-term changes in response to the pandemic versus long-term investments in building systems.

Buildings are more likely to make short-term changes



Surveyed workers in Germany are most worried that building management will not consistently enforce health and safety guidelines (37%), invest in new technology to make working in-person safer (32%) and inform occupants of health risks (21%).

Surveyed executive-level workers in Germany have even bigger concerns (98% have concerns, compared to 87% of other employees), especially on whether building management will invest in new technology to make buildings safer.

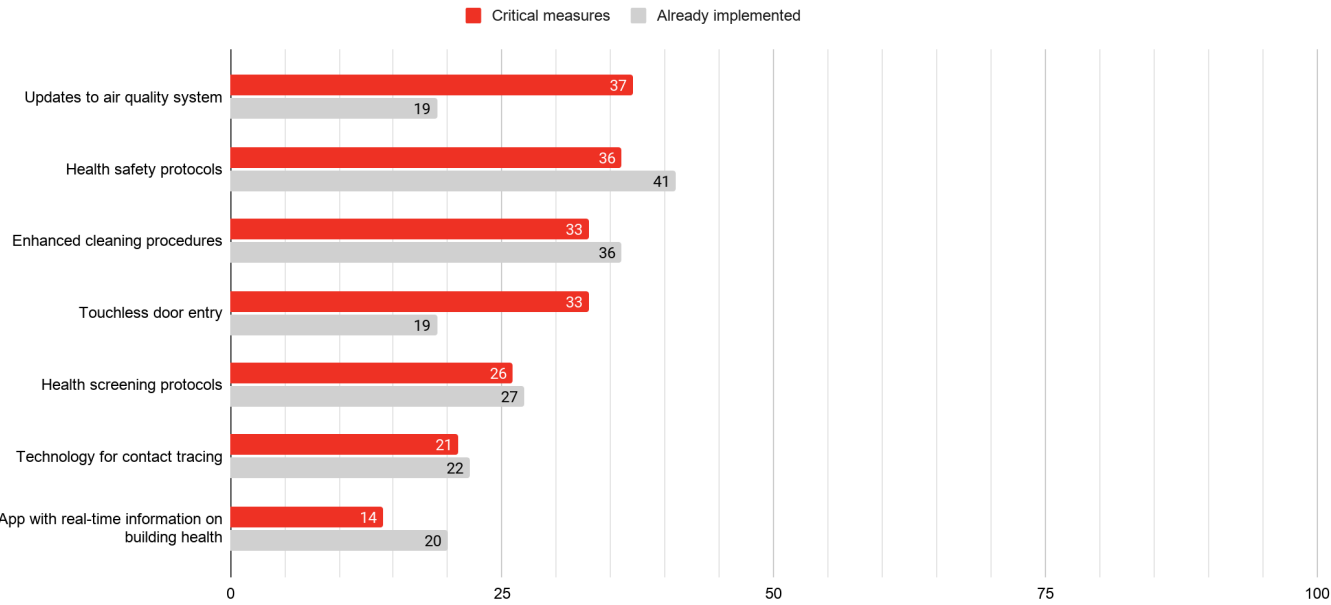
Concerns over building management’s ability to...



PROGRESS TO DATE

To return to work and feel safer, surveyed German workers view updates to air quality systems as a top safety measure (37%) but only 19% of those working on site have seen such updates happen. Other top health safety measures surveyed German workers want include health safety protocols such as social distancing or mandatory masks (36%), enhanced cleaning procedures (33%), touchless door entry (33%) and health screening protocols such as temperature checks (26%).

Measures to make German workers feel safer

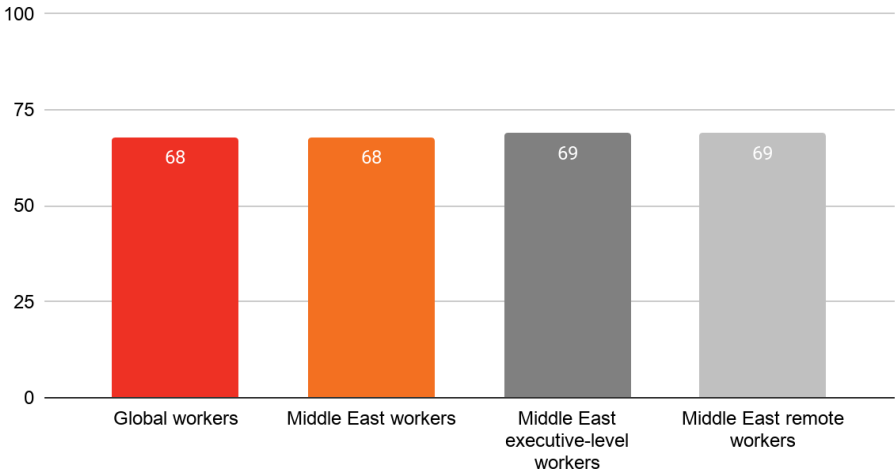


HOW DO WORKERS IN THE MIDDLE EAST FEEL ABOUT THEIR WORK ENVIRONMENTS?

As workers in the Middle East return on site, many respondents have concerns about their health and safety while working in their employer’s building.

A majority of the workforce surveyed in the Middle East (68%) does not feel completely safe working in their employer’s buildings. This number is on par with surveyed executive-level workers (69%) and workers who are currently remote (69%).

Percentage of workers not feeling safe in buildings



WHAT ARE THEY WORRIED ABOUT?

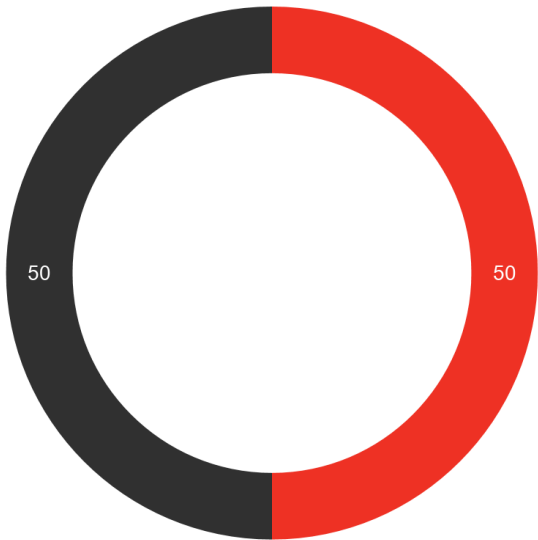
The surveyed workers in the Middle East are equally concerned about COVID-19 transmission through the air (50%) and through contact with a surface (50%).

60% of remote workers in the region surveyed are more concerned with surface transmission.

Note: Sample size of remote workers is small (n=34).

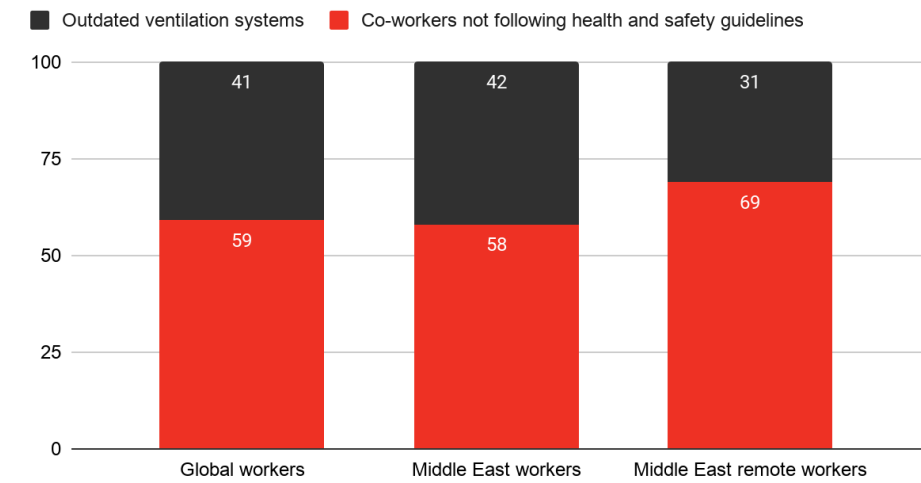
Middle East workers are equally concerned about COVID-19 transmission

● Through touching a surface that has the virus ● Through the air without direct contact with a person



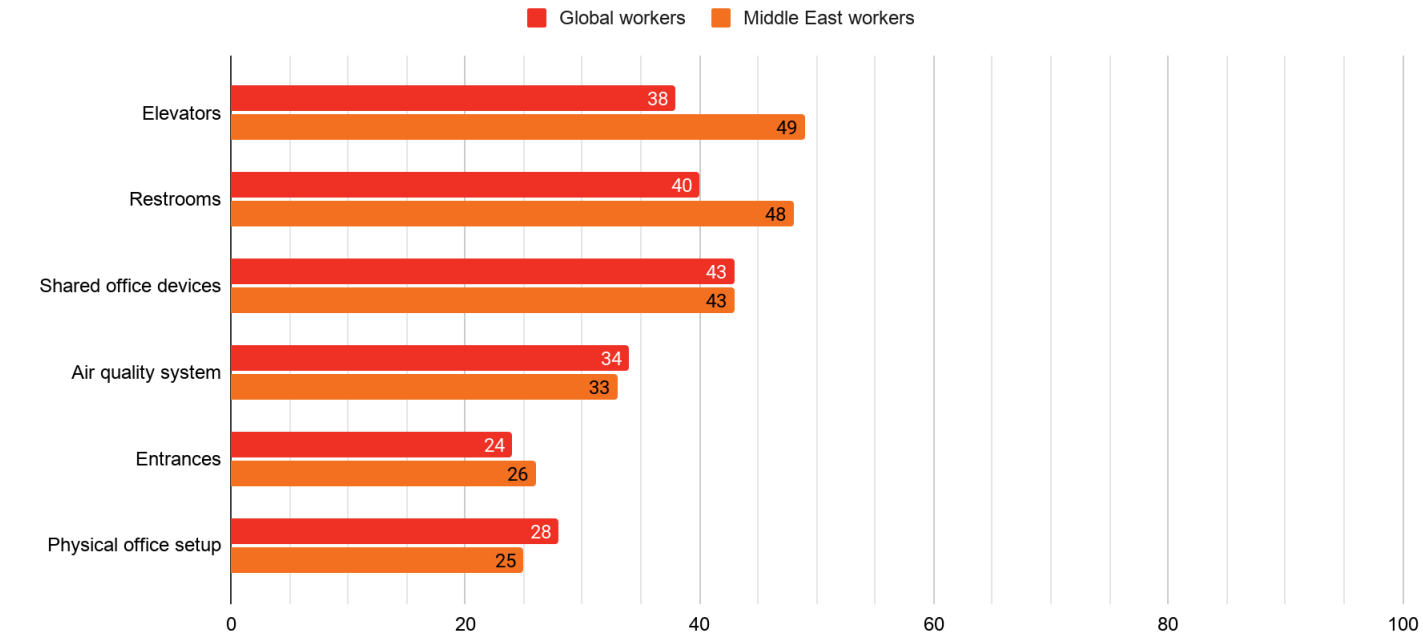
In terms of what poses a bigger threat to their safety, 58% of Middle East respondents point to co-workers not following health and safety guidelines and 42% are concerned about outdated ventilation systems.

Biggest threat to their safety



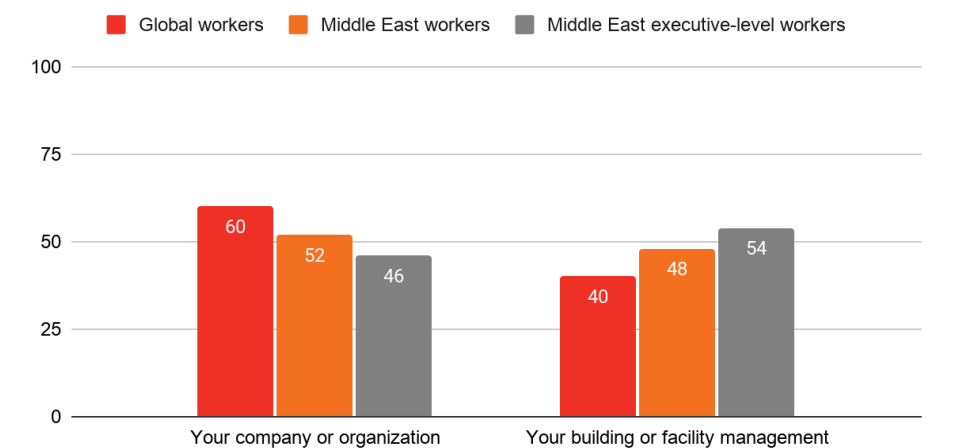
With regards to the biggest health and safety risk in their work buildings or facilities, surveyed workers in the Middle East cite elevators (49%), restrooms (48%), shared office devices (43%) and the building’s air quality system (33%).

Biggest health and safety risk in their work buildings



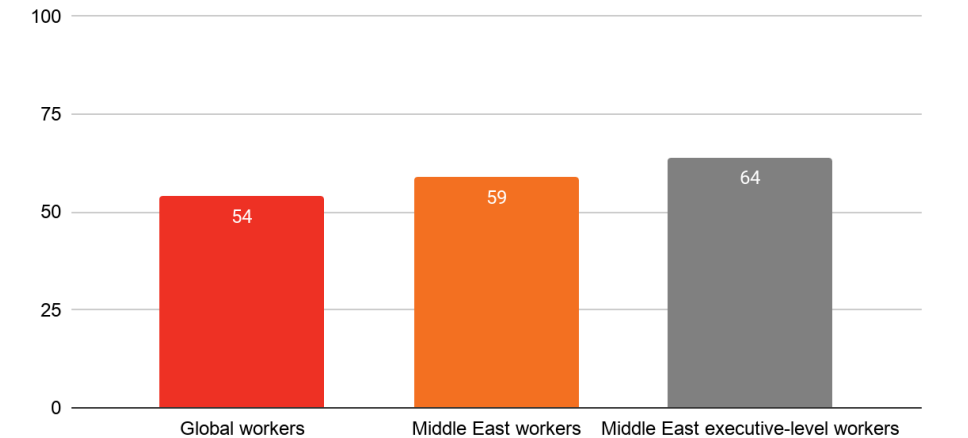
More than half of Middle East respondents (52%) admit their company or organization should be doing more for workplace safety, compared to 48% who believe their building or facility management should be doing more; this number increases to 54% for surveyed executive-level workers in the region who put more responsibility with their building or facility management.

Who should be doing more to keep the workplace safer during COVID-19?



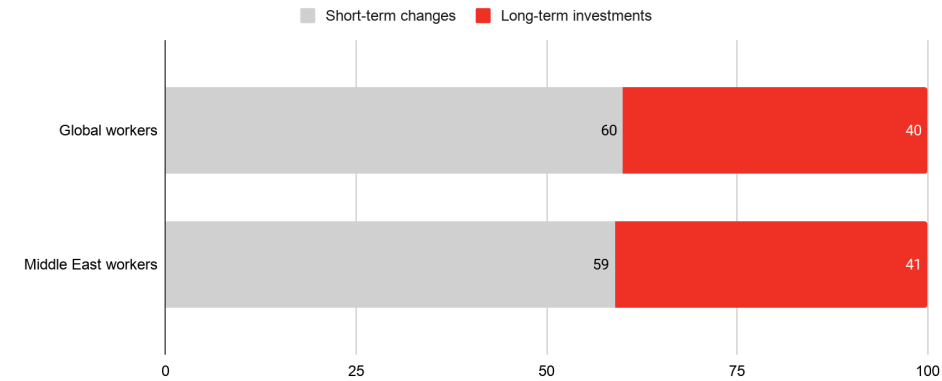
More than half of Middle East surveyed workers (59%) agree that their building management has not taken the steps necessary to keep them safer on the job; this number jumps to 64% for surveyed executive-level workers.

Building management has not taken the steps necessary to keep workers safer on the job



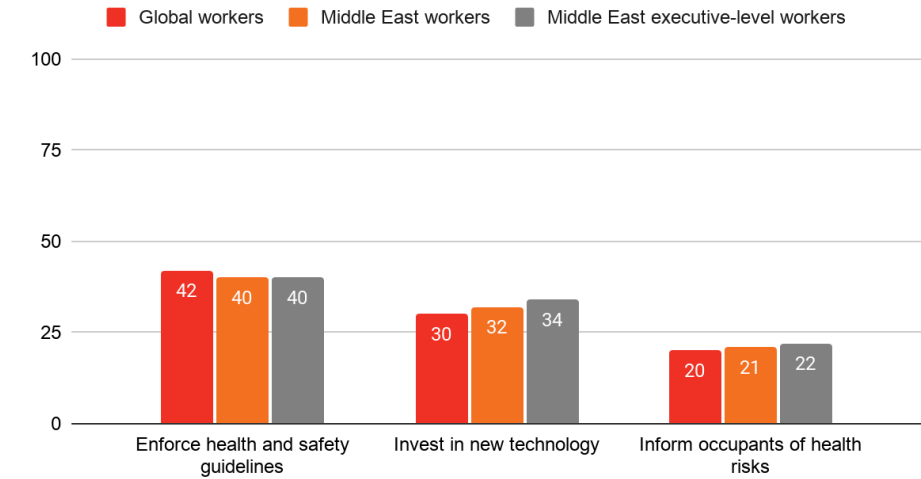
Nearly three in five Middle East respondents (59%) believe their building is more likely to make short-term changes in response to the pandemic versus long-term investments in building systems.

Buildings are more likely to make short-term changes



Surveyed workers in the region are most worried that building management will not consistently enforce health and safety guidelines (40%), invest in new technology to make in-person work safer (32%) and inform occupants of health risks (21%).

Concerns over building management’s ability to...

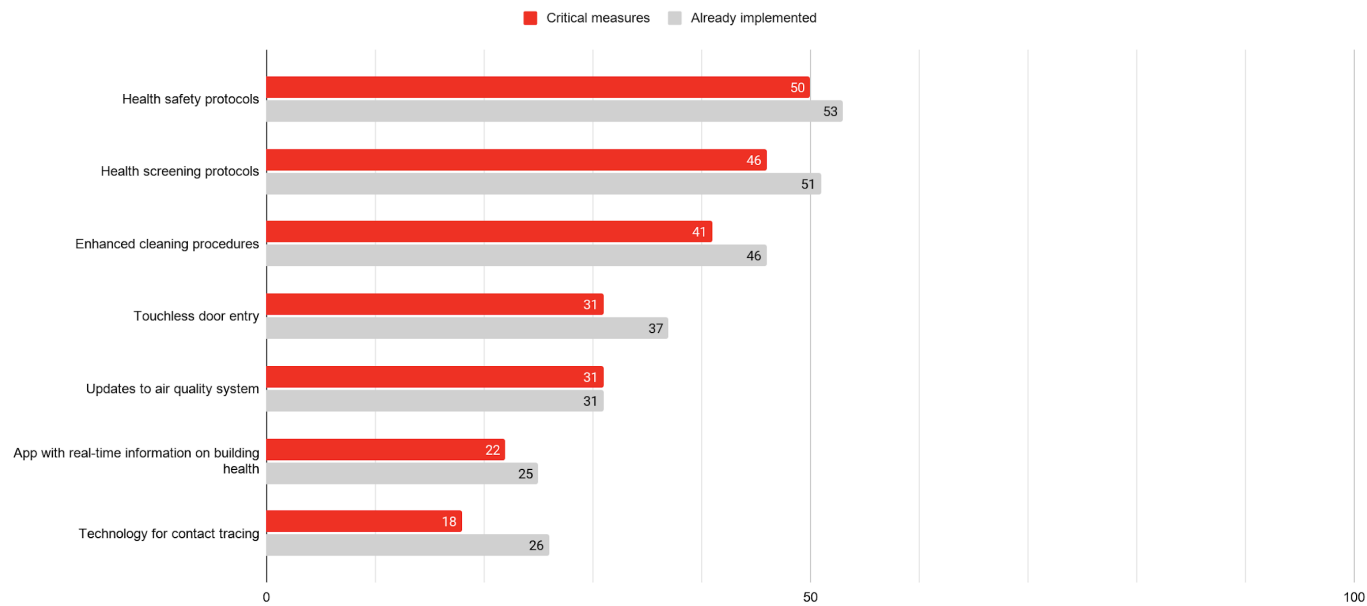


PROGRESS TO DATE

To return to work and feel safer, surveyed Middle East workers view health safety protocols such as social distancing or mandatory masks as a top safety measure (50%), and in fact, 53% of those working on site have seen such updates happen. Other top health safety measures surveyed workers in the region want include health screening protocols such as temperature checks (46%), enhanced cleaning procedures (41%), updates to air quality systems (31%) and touchless door entry (31%).

While 31% of Middle East respondents working on site say their building has updated its air quality system, this is less common than short-term changes such as health safety protocols, health screening protocols and enhanced cleaning procedures.

Measures to make Middle East workers feel safer



METHODOLOGY

The Honeywell survey was conducted by Wakefield Research (www.wakefieldresearch.com) among 2,000 workers in buildings of 500+ workers in the following markets: U.S. (500), U.K. (500), Germany (500) and the Middle East (500), between November 19th and December 1st, 2020, using an email invitation and an online survey. The data was weighted to ensure an accurate representation of countries' population size for the Middle East.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. For the interviews conducted in this particular study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 2.2 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

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