In April 2021, Deloitte launched a survey asking its clients how they were approaching their return to the workplace. Deloitte is a global network of member firms, each of which is a legally independent entity providing a range of professional services. This publication may contain general information only and Deloitte is not, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor.

## Respondent demographics

![Bar chart showing industry distribution of respondents.](image)

- **Hybrid**: 18%
- **100% onsite**: 2%
- **100% remote**: 17%
- **Onsite/remote/hybrid**: 64%

**Geographic site**

- **North America**: 9%
- **Europe**: 5%
- **Southern United States**: 9%
- **Western United States**: 13%
- **Outside the United States**: 5%

**Location**

- **Office**: 67%
- **Home**: 64%
- **All other**: 4%

## Physical workplace usage and expectations

![Pie chart showing physical workplace usage and expectations.](image)

- **Will strongly encourage vaccinations**: 15%
- **Will require vaccinations**: 3%
- **Will strongly encourage travel**: 67%
- **Will require travel**: 4%

## Returning to the workplace in the near term

- **More analysis will encourage employees to get vaccinated, but only 1% will require it.**
- **Expect to return to offices in person in the next three months.**
- **Daily health certification**
  - **Continue in an on-site setting**: 52%
  - **Will go remote temporarily**: 51%
  - **Will go remote permanently**: 1%
- **Proof of COVID-19 vaccination**
  - **Continue in an on-site setting**: 52%
  - **Will go remote temporarily**: 51%
  - **Will go remote permanently**: 1%
- **Proof of COVID-19 testing**
  - **Continue in an on-site setting**: 52%
  - **Will go remote temporarily**: 51%
  - **Will go remote permanently**: 1%
- **Social distancing**
  - **Continue in an on-site setting**: 89%
  - **Will go remote temporarily**: 91%
  - **Will go remote permanently**: 89%
- **Masks**
  - **Continue in an on-site setting**: 91%
  - **Will go remote temporarily**: 93%
  - **Will go remote permanently**: 91%
- **All others**
  - **Continue in an on-site setting**: 22%
  - **Will go remote temporarily**: 26%
  - **Will go remote permanently**: 13%

## Returning to the workplace in the "new normal" (when freedom of movement is allowed)

- **Flexible workspaces**
  - **Continue in an on-site setting**: 23%
  - **Will go remote temporarily**: 26%
  - **Will go remote permanently**: 19%
  - **Hybrid**: 10%
  - **Onsite**: 10%
  - **Remote**: 10%

## Top priorities for returning to offices in person

- **Proof of COVID-19 vaccination**
- **Proof of COVID-19 testing**
- **Daily health certification**
- **Social distancing**
- **Flexible workspaces**
- **Masks**
- **All others**

## Expected changes to office space in 2022

- **Expansions of 1% to 20%**
- **Expansions of 25 to 49%**
- **Expansions of 50 to 74%**
- **Expansions of 75 to 100%**
- **Expansions of more than 100%**

<table>
<thead>
<tr>
<th>Change in Office Space</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1% to 20%</td>
<td>25%</td>
</tr>
<tr>
<td>25% to 49%</td>
<td>13%</td>
</tr>
<tr>
<td>50% to 74%</td>
<td>10%</td>
</tr>
<tr>
<td>75% to 100%</td>
<td>5%</td>
</tr>
<tr>
<td>More than 100%</td>
<td>4%</td>
</tr>
</tbody>
</table>

## Other survey findings

- **Case study: Implementing a hybrid model**
  - **Hybrid models appear to be here to stay in the "new normal."**
  - **68% of employers will strongly encourage employees to get vaccinated, but only 1% will require it.**
  - **56% of employers plan to reduce travel expenses.**

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