

**YouGov Survey Results**  
**Sample Size - 516 HR decision makers**  
 Fieldwork: 11th - 19th October 2018



| Total | Organization size              |                              |                        | Work industry (MAIN) |              |        |                        |                         |       |               |  |                           |           |                               |             |       |
|-------|--------------------------------|------------------------------|------------------------|----------------------|--------------|--------|------------------------|-------------------------|-------|---------------|--|---------------------------|-----------|-------------------------------|-------------|-------|
|       | Small (less than 50 employees) | Medium (50 to 249 employees) | Large (250+ employees) | Manufacturing        | Construction | Retail | Finance and Accounting | Hospitality and leisure | Legal | IT & telecoms | Media/marketing/advertising/PR & sales | Medical & health services | Education | Transportation & distribution | Real estate | Other |

Does the business have a policy that allows employees to work from home?

|                          |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
|--------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Base: HR decision makers | 516 | 286 | 115 | 115 | 77  | 26  | 36  | 57  | 35  | 21  | 62  | 17  | 27  | 30  | 21  | 19  | 88  |
| Yes, it does             | 55% | 50% | 59% | 64% | 45% | 62% | 36% | 67% | 31% | 57% | 79% | 76% | 67% | 33% | 52% | 53% | 57% |
| No, it doesn't           | 41% | 46% | 40% | 31% | 52% | 31% | 61% | 32% | 63% | 38% | 18% | 24% | 26% | 63% | 38% | 47% | 42% |
| Don't know               | 3%  | 4%  | 1%  | 4%  | 3%  | 8%  | 3%  | 2%  | 6%  | 5%  | 3%  | -   | 7%  | 3%  | 10% | -   | 1%  |

You previously said that your business has a policy that allows employees to work from home...In general, to what extent would you say your business encourages or discourages employees to work from home?

|   |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |
|---|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Base: HR decision makers whose company allows employees to work from home | 286 | 144 | 68  | 74  | 35  | 16  | 13   | 38  | 11  | 12  | 49  | 13  | 18  | 10  | 11  | 10  | 50  |
| Encourages a lot  | 21% | 23% | 9%  | 27% | 11% | 19% | 31%  | 13% | 9%  | 8%  | 29% | 23% | 44% | 10% | 36% | 10% | 20% |
| Encourages a little   | 49% | 44% | 54% | 53% | 49% | 44% | 69%  | 45% | 36% | 67% | 47% | 54% | 33% | 60% | 55% | 70% | 46% |
| Discourages a little  | 23% | 23% | 28% | 18% | 37% | 25% | -    | 34% | 36% | 25% | 20% | 23% | 17% | 10% | -   | 10% | 20% |
| Discourages a lot   | 4%  | 4%  | 7%  | 1%  | -   | 13% | -    | 5%  | 18% | -   | 4%  | -   | -   | -   | -   | 10% | 6%  |
| Don't know  | 4%  | 6%  | 1%  | 1%  | 3%  | -   | 3%   | -   | -   | -   | -   | -   | 6%  | 20% | 9%  | -   | 8%  |
| Net: Encourages   | 70% | 67% | 63% | 80% | 60% | 63% | 100% | 58% | 45% | 75% | 76% | 77% | 78% | 70% | 91% | 80% | 66% |
| Net: Discourages  | 27% | 27% | 35% | 19% | 37% | 38% | -    | 39% | 55% | 25% | 24% | 23% | 17% | 10% | -   | 20% | 26% |

In general, do you think that employees at your business work to a higher standard or lower standard when working from home, or do you think it is about the same?

|                            |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
|----------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Base: HR decision makers   | 286 | 144 | 68  | 74  | 35  | 16  | 13  | 38  | 11  | 12  | 49  | 13  | 18  | 10  | 11  | 10  | 50  |
| A much higher standard     | 7%  | 5%  | 4%  | 15% | 9%  | 6%  | 23% | 5%  | 9%  | -   | 8%  | 8%  | 6%  | 10% | -   | 10% | 6%  |
| A slightly higher standard | 20% | 22% | 19% | 18% | 9%  | 25% | 38% | 21% | 27% | -   | 29% | 15% | 33% | 20% | 18% | 10% | 16% |
| About the same             | 49% | 51% | 46% | 49% | 43% | 25% | 31% | 47% | 36% | 92% | 53% | 54% | 50% | 60% | 64% | 50% | 48% |
| A slightly lower standard  | 17% | 16% | 22% | 16% | 29% | 31% | 8%  | 18% | 27% | 8%  | 8%  | 23% | 11% | -   | 9%  | 10% | 24% |
| A much lower standard      | 3%  | 2%  | 6%  | 1%  | 6%  | -   | -   | 5%  | -   | -   | -   | -   | -   | -   | -   | 20% | 4%  |
| Don't know                 | 3%  | 4%  | 3%  | 1%  | 6%  | 13% | -   | 3%  | -   | -   | 2%  | -   | -   | 10% | 9%  | -   | 2%  |
| Net: Higher                | 28% | 27% | 24% | 32% | 17% | 31% | 62% | 26% | 36% | -   | 37% | 23% | 39% | 30% | 18% | 20% | 22% |
| Net: Lower                 | 20% | 18% | 28% | 18% | 34% | 31% | 8%  | 24% | 27% | 8%  | 8%  | 23% | 11% | -   | 9%  | 30% | 28% |

In general, do you think that employees in businesses that allow staff to work from home work to a higher standard or lower standard when working from home, or do you think it is about the same?

|  |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
|--|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Base: HR decision makers whose company doesn't allow employees to work from home | 213 | 131 | 46  | 36  | 40  | 8   | 22  | 18  | 22  | 8   | 11  | 4   | 7   | 19  | 8   | 9   | 37  |
| A much higher standard   | 3%  | 2%  | -   | 8%  | -   | -   | -   | 11% | 5%  | -   | 9%  | -   | -   | 5%  | -   | -   | 3%  |
| A slightly higher standard   | 15% | 16% | 7%  | 22% | 18% | -   | 23% | 11% | 23% | 38% | 18% | 25% | -   | 16% | 13% | 11% | 5%  |
| About the same   | 36% | 34% | 50% | 25% | 30% | 63% | 45% | 44% | 41% | 25% | 36% | 50% | 14% | 42% | 25% | 22% | 32% |
| A slightly lower standard  | 23% | 24% | 24% | 22% | 40% | 25% | 5%  | 17% | 9%  | 13% | 27% | 25% | 29% | 11% | 25% | 44% | 30% |
| A much lower standard  | 7%  | 5%  | 7%  | 17% | 8%  | -   | 5%  | 17% | -   | 25% | -   | -   | 14% | 5%  | 13% | 11% | 5%  |
| Don't know   | 15% | 19% | 13% | 6%  | 5%  | 13% | 23% | -   | 23% | -   | 9%  | -   | 43% | 21% | 25% | 11% | 24% |
| Net: Higher  | 18% | 18% | 7%  | 31% | 18% | -   | 23% | 22% | 27% | 38% | 27% | 25% | -   | 21% | 13% | 11% | 8%  |
| Net: Lower   | 31% | 28% | 30% | 39% | 48% | 25% | 9%  | 33% | 9%  | 38% | 27% | 25% | 43% | 16% | 38% | 56% | 35% |

**YouGov Survey Results**  
**Sample Size - 516 HR decision makers**

Fieldwork: 11th - 19th October 2018

|  | Company annual turnover |                            |                                 |                           |            |                      | Omnibus Decision Maker  |                             |                              |                     |                       |                        |  |              |                         |                         |
|--|-------------------------|----------------------------|---------------------------------|---------------------------|------------|----------------------|---|-----------------------------|------------------------------|---------------------|-----------------------|------------------------|--|--------------|-------------------------|-------------------------|
|  | First year of trading   | Less than £1 million (NET) | £1 million - £9.9 million (NET) | £10 million or more (NET) | Don't know | Prefer not to answer | Marketing activities (e.g. advertising, direct marketing, PR) | Business development/ sales | Company credit/ charge cards | Finance/ accounting | Company mobile phones | Company pension scheme | HR (e.g. personnel, learning and development, recruitment) | IT/ Telecoms | Procurement/ purchasing | Electricity/ gas supply |
| <b>Does the business have a policy that allows employees to work from home?</b>  |                         |                            |                                 |                           |            |                      |   |                             |                              |                     |                       |                        |  |              |                         |                         |
| Base: HR decision makers   | 7                       | 97                         | 208                             | 146                       | 30         | 28                   | 302   | 359                         | 223                          | 285                 | 243                   | 226                    | 516  | 257          | 315                     | 205                     |
| Yes, it does   | 71%                     | 43%                        | 54%                             | 68%                       | 37%        | 61%                  | 57%   | 58%                         | 57%                          | 56%                 | 57%                   | 58%                    | 55%  | 55%          | 53%                     | 53%                     |
| No, it doesn't   | 29%                     | 54%                        | 43%                             | 29%                       | 53%        | 39%                  | 39%   | 40%                         | 40%                          | 41%                 | 40%                   | 39%                    | 41%  | 42%          | 43%                     | 43%                     |
| Don't know   | -                       | 3%                         | 3%                              | 3%                        | 10%        | -                    | 3%  | 3%                          | 3%                           | 3%                  | 3%                    | 3%                     | 4%   | 4%           | 4%                      | 4%                      |
| <b>You previously said that your business has a policy that allows employees to work from home...In general, to what extent would you say your business encourages or discourages employees to work from home?</b> |                         |                            |                                 |                           |            |                      |   |                             |                              |                     |                       |                        |  |              |                         |                         |
| Base: HR decision makers whose company allows employees to work from home  | 5                       | 42                         | 112                             | 99                        | 11         | 17                   | 173   | 207                         | 127                          | 160                 | 139                   | 131                    | 286  | 141          | 166                     | 108                     |
| Encourages a lot   | 80%                     | 26%                        | 19%                             | 15%                       | 27%        | 29%                  | 27%   | 24%                         | 27%                          | 24%                 | 24%                   | 27%                    | 21%  | 26%          | 25%                     | 26%                     |
| Encourages a little  | 20%                     | 52%                        | 48%                             | 55%                       | 45%        | 24%                  | 45%   | 45%                         | 46%                          | 48%                 | 50%                   | 47%                    | 49%  | 48%          | 47%                     | 46%                     |
| Discourages a little   | -                       | 19%                        | 23%                             | 24%                       | 18%        | 29%                  | 20%   | 23%                         | 20%                          | 22%                 | 20%                   | 21%                    | 23%  | 19%          | 20%                     | 19%                     |
| Discourages a lot  | -                       | -                          | 5%                              | 5%                        | -          | 6%                   | 4%  | 4%                          | 3%                           | 3%                  | 4%                    | 2%                     | 4%   | 4%           | 5%                      | 6%                      |
| Don't know   | -                       | 2%                         | 4%                              | 1%                        | 9%         | 12%                  | 4%  | 4%                          | 4%                           | 3%                  | 3%                    | 3%                     | 4%   | 4%           | 3%                      | 4%                      |
| Net: Encourages  | 100%                    | 79%                        | 67%                             | 70%                       | 73%        | 53%                  | 72%   | 69%                         | 72%                          | 73%                 | 73%                   | 73%                    | 70%  | 74%          | 72%                     | 72%                     |
| Net: Discourages   | -                       | 19%                        | 29%                             | 29%                       | 18%        | 35%                  | 24%   | 27%                         | 24%                          | 25%                 | 24%                   | 24%                    | 27%  | 23%          | 25%                     | 24%                     |
| <b>In general, do you think that employees at your business work to a higher standard or lower standard when working from home, or do you think it is about the same?</b>  |                         |                            |                                 |                           |            |                      |   |                             |                              |                     |                       |                        |  |              |                         |                         |
| Base: HR decision makers   | 5                       | 42                         | 112                             | 99                        | 11         | 17                   | 173   | 207                         | 127                          | 160                 | 139                   | 131                    | 286  | 141          | 166                     | 108                     |
| A much higher standard   | 20%                     | 7%                         | 4%                              | 9%                        | 18%        | 12%                  | 10%   | 9%                          | 12%                          | 9%                  | 10%                   | 11%                    | 7%   | 11%          | 8%                      | 14%                     |
| A slightly higher standard   | 40%                     | 31%                        | 22%                             | 14%                       | 9%         | 16%                  | 23%   | 21%                         | 23%                          | 22%                 | 23%                   | 19%                    | 20%  | 23%          | 22%                     | 19%                     |
| About the same   | 40%                     | 45%                        | 50%                             | 51%                       | 45%        | 47%                  | 46%   | 50%                         | 43%                          | 44%                 | 45%                   | 44%                    | 49%  | 46%          | 45%                     | 40%                     |
| A slightly lower standard  | -                       | 17%                        | 19%                             | 18%                       | 18%        | 12%                  | 16%   | 14%                         | 17%                          | 19%                 | 17%                   | 21%                    | 17%  | 15%          | 18%                     | 20%                     |
| A much lower standard  | -                       | -                          | 2%                              | 5%                        | -          | 6%                   | 2%  | 3%                          | 2%                           | 3%                  | 2%                    | 2%                     | 3%   | 2%           | 4%                      | 4%                      |
| Don't know   | -                       | -                          | 4%                              | 3%                        | 9%         | 6%                   | 3%  | 3%                          | 3%                           | 3%                  | 2%                    | 3%                     | 2%   | 2%           | 2%                      | 3%                      |
| Net: Higher  | 60%                     | 38%                        | 26%                             | 23%                       | 27%        | 29%                  | 33%   | 30%                         | 35%                          | 31%                 | 33%                   | 31%                    | 28%  | 35%          | 31%                     | 33%                     |
| Net: Lower   | -                       | 17%                        | 21%                             | 23%                       | 18%        | 18%                  | 19%   | 17%                         | 20%                          | 22%                 | 19%                   | 24%                    | 20%  | 17%          | 22%                     | 24%                     |
| <b>In general, do you think that employees in businesses that allow staff to work from home work to a higher standard or lower standard when working from home, or do you think it is about the same?</b>          |                         |                            |                                 |                           |            |                      |   |                             |                              |                     |                       |                        |  |              |                         |                         |
| Base: HR decision makers whose company doesn't allow employees to work from home   | 2                       | 52                         | 89                              | 43                        | 16         | 11                   | 119   | 142                         | 90                           | 116                 | 96                    | 89                     | 213  | 107          | 137                     | 89                      |
| A much higher standard   | -                       | -                          | 2%                              | 5%                        | 13%        | -                    | 2%  | 1%                          | 3%                           | 3%                  | 2%                    | 2%                     | 3%   | 1%           | 4%                      | 2%                      |
| A slightly higher standard   | 50%                     | 10%                        | 17%                             | 12%                       | 19%        | 27%                  | 16%   | 18%                         | 12%                          | 13%                 | 15%                   | 12%                    | 15%  | 14%          | 12%                     | 15%                     |
| About the same   | 50%                     | 37%                        | 37%                             | 37%                       | 38%        | 18%                  | 35%   | 34%                         | 39%                          | 36%                 | 38%                   | 38%                    | 36%  | 37%          | 37%                     | 38%                     |
| A slightly lower standard  | -                       | 23%                        | 24%                             | 30%                       | 13%        | 18%                  | 21%   | 22%                         | 17%                          | 17%                 | 20%                   | 18%                    | 23%  | 20%          | 22%                     | 13%                     |
| A much lower standard  | -                       | 8%                         | 6%                              | 12%                       | -          | 9%                   | 8%  | 8%                          | 8%                           | 8%                  | 10%                   | 7%                     | 9%   | 9%           | 7%                      | 9%                      |
| Don't know   | -                       | 23%                        | 15%                             | 5%                        | 19%        | 27%                  | 18%   | 17%                         | 20%                          | 22%                 | 18%                   | 19%                    | 15%  | 19%          | 18%                     | 22%                     |
| Net: Higher  | 50%                     | 10%                        | 19%                             | 16%                       | 31%        | 27%                  | 18%   | 19%                         | 16%                          | 16%                 | 17%                   | 15%                    | 18%  | 15%          | 16%                     | 17%                     |
| Net: Lower   | -                       | 31%                        | 29%                             | 42%                       | 13%        | 27%                  | 29%   | 30%                         | 26%                          | 25%                 | 28%                   | 28%                    | 31%  | 29%          | 29%                     | 22%                     |

**YouGov Survey Results**  
**Sample Size - 516 HR decision makers**  
Fieldwork: 11th - 19th October 2018

| Company age   |                             |                              |                              |               |            |
|---------------|-----------------------------|------------------------------|------------------------------|---------------|------------|
| Up to 5 years | Over 5 years up to 10 years | Over 10 years up to 20 years | Over 20 years up to 35 years | Over 35 years | Don't know |

Does the business have a policy that allows employees to work from home?

|                          |     |     |     |     |     |     |
|--------------------------|-----|-----|-----|-----|-----|-----|
| Base: HR decision makers | 48  | 66  | 124 | 130 | 141 | 7   |
| Yes, it does             | 58% | 64% | 61% | 52% | 48% | 57% |
| No, it doesn't           | 40% | 32% | 37% | 42% | 49% | 43% |
| Don't know               | 2%  | 5%  | 2%  | 5%  | 3%  | -   |

You previously said that your business has a policy that allows employees to work from home...In general, to what extent would you say your business encourages or discourages employees to work from home?

Base: HR decision makers whose company allows employees to work from home

|                         |            |            |            |            |            |            |
|-------------------------|------------|------------|------------|------------|------------|------------|
| Encourages a lot        | 36%        | 29%        | 17%        | 19%        | 15%        | 25%        |
| Encourages a little     | 50%        | 48%        | 51%        | 44%        | 51%        | 50%        |
| Discourages a little    | 14%        | 19%        | 20%        | 28%        | 26%        | 25%        |
| Discourages a lot       | -          | 2%         | 7%         | 6%         | 3%         | -          |
| Don't know              | -          | 2%         | 5%         | 3%         | 4%         | -          |
| <b>Net: Encourages</b>  | <b>86%</b> | <b>76%</b> | <b>68%</b> | <b>63%</b> | <b>66%</b> | <b>75%</b> |
| <b>Net: Discourages</b> | <b>14%</b> | <b>21%</b> | <b>26%</b> | <b>34%</b> | <b>29%</b> | <b>25%</b> |

In general, do you think that employees at your business work to a higher standard or lower standard when working from home, or do you think it is about the same?

Base: HR decision makers

|                            |            |            |            |            |            |            |
|----------------------------|------------|------------|------------|------------|------------|------------|
| A much higher standard     | 7%         | 5%         | 5%         | 13%        | 4%         | 25%        |
| A slightly higher standard | 32%        | 26%        | 22%        | 21%        | 10%        | -          |
| About the same             | 46%        | 43%        | 53%        | 43%        | 56%        | 50%        |
| A slightly lower standard  | 14%        | 19%        | 12%        | 24%        | 18%        | 25%        |
| A much lower standard      | -          | 2%         | 3%         | -          | 7%         | -          |
| Don't know                 | -          | 5%         | 5%         | -          | 4%         | -          |
| <b>Net: Higher</b>         | <b>39%</b> | <b>31%</b> | <b>28%</b> | <b>34%</b> | <b>15%</b> | <b>25%</b> |
| <b>Net: Lower</b>          | <b>14%</b> | <b>21%</b> | <b>14%</b> | <b>24%</b> | <b>25%</b> | <b>25%</b> |

In general, do you think that employees in businesses that allow staff to work from home work to a higher standard or lower standard when working from home, or do you think it is about the same?

Base: HR decision makers whose company doesn't allow employees to work from home

|                            |            |            |            |            |            |            |
|----------------------------|------------|------------|------------|------------|------------|------------|
| A much higher standard     | 5%         | -          | 4%         | -          | 4%         | -          |
| A slightly higher standard | 16%        | 14%        | 15%        | 16%        | 12%        | 67%        |
| About the same             | 26%        | 38%        | 33%        | 42%        | 38%        | -          |
| A slightly lower standard  | 37%        | 19%        | 33%        | 15%        | 23%        | -          |
| A much lower standard      | -          | 5%         | 7%         | 11%        | 7%         | -          |
| Don't know                 | 16%        | 24%        | 9%         | 16%        | 16%        | 33%        |
| <b>Net: Higher</b>         | <b>21%</b> | <b>14%</b> | <b>20%</b> | <b>16%</b> | <b>16%</b> | <b>67%</b> |
| <b>Net: Lower</b>          | <b>37%</b> | <b>24%</b> | <b>39%</b> | <b>25%</b> | <b>30%</b> | <b>-</b>   |