IFS Annual Lecture 2023: Does working from home have a future?

Professor Nicholas Bloom, Stanford University

18 May 2023
The View at the Royal College of Surgeons

@TheIFS
Does Working From Home Have A Future?

Nick Bloom (Stanford)

IFS Annual Lecture

May 18th 2023
Start by two sets of thanks

I worked at the IFS from 1996-2001
Background and Data on Working From Home

- Research on WFH starting in 2004
- Monthly surveys of 10,000 working age adults and 5,000 firms
- Discussions and consulting with 100s of organizations globally
Going to cover three sections

>>>>> Current state of working from home

>>>>> Thoughts on managing hybrid-WFH

>>>>> Five impacts on the economy
WFH is stabilizing at about 25% of days: a 5-fold jump vs 2019

US full days worked from home, %

Source:  N=131,225(SWAA)  N=364,540(HHP). SWAA data from survey responses weighted to match the US population. Pre-covid data from the American Time Use Survey. CHPS respondents weighted to match the US population aged 20 to 64 in households with incomes above $25,000.

Survey of Workplace Attitudes and Arrangements (Barrero, Bloom and Davis 2021)  https://wfhresearch.com/
Globally (graduates): North America and UK highest, then Northern Europe and Australia, with Southern Europe lower and Asia lowest

Source: Responses to the question “How many full paid days are you working from home this week?”. Only for university educated respondents that have worked for pay in the week of the interview.

Similar Global Pattern in *Return to Office* – US and UK Lowest, Europe and Australia Middle, and Asia Highest

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**Source**: JLL Research – *regional averages include more markets than displayed.* Jones Lang LaSalle IP, Inc. Not for Public Dissemination
English Speaking Countries Job-Postings Data

Percent of job-postings offering hybrid or remote work

Notes: Share of vacancy postings that say a job allows one or more days remote working per week, covering fully remote and hybrid. Natural language processing of all online jobs in the US, around 43 million in 2022 from Lightcast. From the research paper “Remote work across jobs, companies and space” by Stephen Hansen, Peter Lambert, Nicholas Bloom, Steven Davis, Raffaella Sadun and Bledi Taska. Data from www.wfhmap.com
Employees are split into three groups – most firms have some of all

### Working Arrangements

<table>
<thead>
<tr>
<th>Working Arrangement</th>
<th>Percent of full-time employees</th>
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<tbody>
<tr>
<td>Fully on site</td>
<td>59.6</td>
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<tr>
<td>Hybrid</td>
<td>28.8</td>
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<tr>
<td>Full WFH</td>
<td>11.5</td>
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- **Front-line employees**, mostly non-graduates, lower paid,
- **Professionals and managers**, mostly graduates, higher paid
- **Specialized roles** - IT support, payroll etc, often contractors

**Source**: The sample covers the January 2023 to April 2023 waves of the SWAA. Details on [https://wfhresearch.com/](https://wfhresearch.com/)
The graph back to 1965 shows the size of the pandemic-era WFH jump.

WFH days doubling every 15 years pre-pandemic, so the 6-fold pandemic increase is equal to 40 years of pre-pandemic growth.
This rise in WFH is permanent - online shopping is back to its pre-trend, but WFH has stabilized at about 5x its pre-pandemic value.

**Share of retail spending online, %**

**Share of days worked from home, %**

**Source:** Retail data from the Census Bureau, quarterly seasonally adjusted [https://fred.stlouisfed.org/series/ECOMPCTSA](https://fred.stlouisfed.org/series/ECOMPCTSA) to 2022Q4. WFH data from the Survey of Workplace Arrangements and Attitudes [www.wfhresearch.com](http://www.wfhresearch.com) Both data cover the United States.
WFH particularly high in tech and (to a lesser extent) finance

Current WFH: all wage and salary employees by industry

<table>
<thead>
<tr>
<th>Industry</th>
<th>Days per week</th>
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<tbody>
<tr>
<td>Information (incl. part of tech)</td>
<td>2.35</td>
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<tr>
<td>Finance &amp; Insurance</td>
<td>2.17</td>
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<tr>
<td>Professional &amp; Business Services</td>
<td>1.98</td>
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<tr>
<td>Arts &amp; Entertainment</td>
<td>1.67</td>
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<tr>
<td>Wholesale Trade</td>
<td>1.48</td>
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<tr>
<td>Real Estate</td>
<td>1.39</td>
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<td>Utilities</td>
<td>1.38</td>
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<tr>
<td>Construction</td>
<td>1.31</td>
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<tr>
<td>Health Care &amp; Social Assistance</td>
<td>1.30</td>
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<tr>
<td>Government</td>
<td>1.25</td>
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<tr>
<td>Other Personal Services</td>
<td>1.13</td>
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<tr>
<td>Education</td>
<td>1.05</td>
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<tr>
<td>Manufacturing</td>
<td>0.82</td>
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<tr>
<td>Retail Trade</td>
<td>0.67</td>
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<tr>
<td>Transportation and Warehousing</td>
<td>0.63</td>
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<tr>
<td>Hospitality &amp; Food Services</td>
<td>0.63</td>
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Notes: Survey of Workplace Attitudes and Arrangements www.wfhresearch.com Sample from November 2022 to April 2023
WFH levels similar by gender (both are converging to 25%)

Source: Responses to the questions:
- **Currently (this week)** what is your work status?
- **For each day last week, did you work a full day (6 or more hours), and if so where?**

Notes: For each wave, we compute the percent of paid full days worked from home in the SWAA. The horizontal-axis location shows when the survey was in the field. The pre-COVID figure is from the 2017-2018 American Time Use Survey. Before November 2020, we asked the first question above. Since November 2021, we have asked the second question. From November 2020 to October 2021, we back-cast responses to the current question using a regression model based on current-question responses and another question (not shown). We re-weight the sample of US residents aged 20 to 64 earning $10,000 or more in 2019 or 2021 to match CPS shares by age-sex-education-earnings cells. 

\[ N = 119,797 \]
The big WFH gap is in education: university grads have ≈2x non-grads

**Source:** Responses to the questions:
- **Currently (this week)** what is your work status?
- **For each day last week,** did you work a full day (6 or more hours), and if so where?

**Notes:** For each wave, we compute the percent of paid full days worked from home in the SWAA. The horizontal-axis location shows when the survey was in the field. We re-weight the sample of US residents aged 20 to 64 earning $10,000 or more in 2019 or 2021 to match CPS shares by age-sex-education-earnings cells.

**N = 119,797**
Four key benefits of Hybrid why this is popular for professionals

1. Employees are happier
2. Productivity is increased (if well organized)
3. Supports diversity, equity and inclusion
4. Saves space (maybe)
Happier: Employees value hybrid-WFH as about an 8% pay increase

Source: Data from 17,087 responses through 2021, reweighted to match US population. Industries with 1000+ respondents. Details on https://wfhresearch.com/
Results for a recent RCT on 1612 engineers, marketing and finance professionals found WFH reduced quit rates 35%

Source: https://bit.ly/3J4rL5I

Nick Bloom @I_Am_NickBloom · Jul 25
New RCT on 1612 employees, finding hybrid #WFH

1) Reduced quit rates by 1/3
2) Shifted hours from WFH days to office days & weekends
3) Increased messaging and video calls (even in the office)
4) Generated a small productivity increase

Paper: bit.ly/3J4rL5I

Source: Attrition rates for 1612 engineers, marketing and finance professionals of Trip.com who were randomized between September 2021 and February 2022 by even and odd birthdays into control (5-days a week in the office) and treatment (Mon, Tue and Thur in the office; Weds and Fri working from home). Difference statistically significant at the 5% level. Details in Bloom, Han and Liang (2022) “How Hybrid Work from Home Works Out”.
Note, most employees do not want to WFH every day

**Responses to the question:** As the pandemic ends, how often would you like to have paid workdays at home?  
**Sample:** Data are from the April to June 2022 SWAA waves from www.wfhresearch.com. The sample includes respondents who have work-from-home experience during the pandemic and pass the attention-check questions. We re-weight the sample of US residents aged 20 to 64 earning $10,000 or more in 2019 or 2021 to match Current Population Survey on age, sex, education, and earnings. **N = 8,788 (both figures)**
Productivity: For professionals **fully remote** typically lowers productivity (but cuts costs) while **organized hybrid** raises productivity a little (1% to 3%)
The two drivers of higher organized hybrid WFH productivity are: (i) quiet for concentration “deep” work, and (ii) time saved commuting.

How did you use the commuting time you saved by working from home, percent

- Working more on my job: 40.7%
- Indoor leisure (TV, games etc): 19.7%
- Outdoor leisure or exercise: 13.5%
- Chores and home improvements: 16.2%
- Childcare: 9.9%

Source: Data from 32,461 respondees who can work from home, reweighted to match the US population. Details on https://wfhresearch.com/
WFH employees save 9 minutes a day on less personal grooming

**Percent who shower or bathe when:**
- Going into work: 85.1%
- Work from home: 73.4%

**Percent who wear fresh clothes when:**
- Going into work: 93.7%
- Work from home: 71.5%

**Percent who brush their teeth when:**
- Going into work: 95.3%
- Work from home: 91.8%

**Percent who shave when:**
- Going into work: 52.4%
- Work from home: 39.6%

**Percent who put on makeup when:**
- Going into work: 44.4%
- Work from home: 27.0%

**Percent who use deodorant when:**
- Going into work: 92.9%
- Work from home: 81.6%

**Source:** Data from 3,997 respondees who can work from home in January 2022, reweighted to match the US population. Details on [https://wfhresearch.com/](https://wfhresearch.com/)
Diversity: Data suggests Hybrid-WFH can help support diversity in various dimensions (race, gender, age, politics and religion)

Source: Data from 10,000 US responses in through 2021, reweighted to match the US population. Details on https://wfhresearch.com/

Space saving: So far not that much….. I’ll come back to this later…
Going to cover three sections

>>>>> Current state of working from home

>>>>> Current state of managing hybrid-WFH

>>>>> Five impacts on the economy
Coordination matters - the benefit of the office is being with colleagues

What are the top 3 benefits of working on your employer's business premises?

Notes: The sample includes respondents to the February 2022 SWAA who passed the attention check questions and worked from home at some point since the start of the COVID-19 pandemic. The SWAA samples US residents aged 20 to 64 who earned $10,000 or more in 2019. N = 2,973.
So large firms mostly planning team or company coordinated hybrid

Qu: “Who decides which days and how many days employees work remotely?”

Source: Survey of Business Uncertainty conducted by the Federal Reserve Bank of Atlanta, Stanford University, and the University of Chicago Booth School of Business.
If you pick WFH days I would suggest Monday and Friday…

Specific Days: Which Days?

- Monday: 23%
- Tuesday: 72%
- Wednesday: 66%
- Thursday: 57%
- Friday: 6%

Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on companies with a specific day / week office requirement. N = 229 companies. The Flex Index is presented by Scoop (scoopforwork.com).
…but worth noting enforcement is not always easy

What happens when employees stay home on office days

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<th>Senior Managers (SBU)</th>
<th>Individual Employees (SWAA)</th>
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<td>Nothing</td>
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<td>31</td>
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<td>Verbal reprimand</td>
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<td>25</td>
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<td>Negative performance review</td>
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<td>13</td>
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<td>Reduction in pay/bonus</td>
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<td>14</td>
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<td>Threat to terminate</td>
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<td>12</td>
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<tr>
<td>Termination</td>
<td>10</td>
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Notes: SWAA participants asked “How has your employer responded to employees who work on business premises fewer days than requested?” over June to September 2022 re-weighted to match US working population 20 to 64. N= 17,875. www.wfhresearch.com
SBU participants asked “Currently, how does your firm deal with employees who work fewer days on business premises than required by company policy?” in September 2022 reweighted to match US firms. N= 335. www.atlantafed.org/SBU
So, how Leaders Can Make the Most of Hybrid WFH

1) Coordinate your team to come in on the same 2 or 3 days each week (eg T, W & Th)

2) Promote in person meetings, events, coffee, training, lunches on those office days

3) Suggest cross-office zoom meetings and reading, writing, data etc on home days

4) Treat anchor day attendance like 2019 in person attendance – exemptions only for emergencies like a sick child, burst water pipe or illness.

5) For new hires (< 1 or 2 years) add an extra day in the office for mentoring
Indeed, appears more mentoring happens on in person days

Responses to the question: How many minutes of your working day did you spend on each of the following activities last Monday/Tuesday/Wednesday/Thursday/Friday?

Notes: We randomized respondents across days of the week. Each figure shows the average number of minutes for the activity in question among respondents who either worked from home or worked on business premises. The sample includes persons who were asked about Monday thru Friday, who are able to work from home, and participated in the March 2023 SWAA. We re-weight the sample of US residents aged 20 to 64 earning $10,000 or more in 2019 or 2021 to match CPS shares by age-sex-education-earnings cells. N = 2,418
Three other tips for managing a hybrid office

1) Performance reviews

2) Cameras on

3) Offices designed for socializing
(A) strong performance reviews for managing WFH

- Office employees can be (partly) evaluated by observing inputs - hours & activity
- WFH employees instead need output evaluation – data, evaluations & discussion
- Importantly this is not surveillance, but “output” performance reviews
(B) Encourage cameras on in video zoom meetings

During work meetings on Teams/Zoom/Webex how does having your camera on impact your engagement?

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<th>Perception</th>
<th>Managers</th>
<th>Employees</th>
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<td>Very positively</td>
<td>29.5%</td>
<td>24.3%</td>
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<tr>
<td>Positively</td>
<td>26.2%</td>
<td>24.5%</td>
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<tr>
<td>No impact</td>
<td>40.8%</td>
<td>35.4%</td>
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<tr>
<td>Negatively</td>
<td>2.7%</td>
<td>6%</td>
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<tr>
<td>Very negatively</td>
<td>0.8%</td>
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Notes: Respondents to the January 2023 SWAA and April SBU who worked during the previous week or who worked from home at some point since the start of the COVID-19 pandemic. We re-weight the SWAA sample to match the Current Population Survey on age, sex, education, and earnings. $N_{SWAA} = 4,240$ $N_{SBU}=337$
(C) More meeting rooms, Teams/Zoom rooms and lounge seating, less cubicles and small offices

Massed offices and desks are **out**

Video-cubicles, meeting rooms and virtual conference rooms are **in**
Going to cover three sections

>>>>> Current state of working from home

>>>>> Current state of managing hybrid-WFH

>>>>> Five impacts on the economy
1) The “Donut Effect” – people have left city centers

Cumulative net flows Feb 2020 - November 2022 as % of population

“Donut Effect” is shifting spending from city centers to the suburbs

Notes: Current Mastercard data covers 48 global cities; donut represents monthly transaction value plotted as a difference in growth from the 2019 average (Central Business District – Suburbs). CBDs defined by pulling coordinates of “city hall”/“city center” from Google Maps.
2) Public transport journeys have plummeted → 1/3 down

Notes: US Passenger trips in the National Transit Database, covering around 8m passenger trips per month in February 2020. Data de-seasonalized and on a 3-month moving average (except from 2020/2-2020/9 due to the rapid impact of the pandemic). 
https://www.transit.dot.gov/ntd
3) Start-up rates are surging - WFH provides a cheaper way to start a new company (no rent, do this on the side of your main WFH job….)

Source: US Census Bureau: Business Applications with a high-propensity of turning into payroll businesses. 3-month moving average (except from 2020/2-2020/9 due to the rapid impact of the pandemic).
https://fred.stlouisfed.org/series/BAHBATOTALSAUS
4) Firms increasing outsourcing/offshoring of IT, HR and finance to access talent, save costs and free up space

What has increased remote work changed at your firm?

- Part-time employees: Firms Increasing = 23.3%, Firms Decreasing = 2.4%
- Independent contractors: Firms Increasing = 18.4%, Firms Decreasing = 2.2%
- Domestic outsourcing: Firms Increasing = 15.7%, Firms Decreasing = 1.4%
- Leased workers: Firms Increasing = 13.3%, Firms Decreasing = 0.7%
- Offshoring: Firms Increasing = 7.3%, Firms Decreasing = 0.9%
- Employment of the physically-challenged: Firms Increasing = 5.0%, Firms Decreasing = 1.1%

Notes: Survey conducted in August 2022 by the Atlanta Federal Reserve Bank’s Survey of Business Uncertainty. N=481. Firms reweighted to match all public and private US firms.
5) Golf has increased 52% since 2019, almost all on weekdays…

Note: Data for August 2019 and August 2022 for a sample of trips. Those included are trips in the INRIX database, which includes trips in vehicles with GPS and phones with location tracking turned-on. The trip needs to be to one of the 3,400 satellite identified gold courses and to have lasted more than two hours. We estimate we sample about 5% of total golf trips.
...the weekday increase happened throughout the day - for example a 178% increase at 3pm on Wednesday

Note: Data for August 2019 and August 202 for a sample of trips. Those included are trips in the INRIX database, which includes trips in vehicles with GPS and phones with location tracking turned-on. The trip needs to be to one of the 3,400 satellite identified gold courses and to have lasted more than two hours. We estimate we sample about 5% of total golf trips.
Longer run technology will continue to build WFH momentum

- New WFH technologies are being rapidly developed as the market for WFH products has increased 5x
- For example, scheduling software, better AV, virtual reality and holograms
- Should make WFH more appealing and space scheduling easier

Conclusions

1. WFH is here to stay – typically 2 days a week for the average office worker

2. Key to succeed is coordinate so employees in together to work socially

3. Offices are being designed to focus on social working together
Back-Up
Surge in start-ups post pandemic – four firms I am working with:

https://radious.pro/
https://kadence.co/
https://www.takescoop.com/
https://ro.am/
http://projectpair.org/
We offer close-to-home, collaborative spaces.

*Work together in person;*

*And get some work-life separation;*

*With no/low commute;*

*In unique spaces, distributed across town.*
A B2B SaaS model for on-demand workspaces

1. **Companies** prepay via subscription;

2. **Employees** book spaces for free;

3. **Homeowners** earn cash;

4. **Radious** keeps 25%. 
"Hybrid work represents the biggest shift to how we work in our generation - it will require a new operating model, spanning people, places, and processes."

- Satya Nadella, CEO - Microsoft
Supercharging employee’s hybrid experience

Coordinate with colleagues, reserve flexible spaces, organize events and discover the perfect hybrid rhythm

“"I'm confident that quantum mechanics is far easier to understand than trying to figure out how teams will manage their schedules in a hybrid workplace.""
Make every trip to the office count.

Never go into the office, find out your teammates aren’t there, and spend the day stuck on Zoom. Team Sync is free to use.
Introducing Snapshots: A single Snapshot of your team’s workplace plans

Hybrid without the heavy lift

Say goodbye to the back and forth of figuring out who’s working where. With automated routines and one-click work status updates, teams stay in the loop without all the noise.

Learn more about Team Sync and Google Calendar →
Roam is Your Whole Company in one HQ

There’s a lot of debate about the future of work, and while nobody knows what the future holds, we do know with absolute certainty: It will never be the same.

Companies like Zoom solved the videoconferencing technology problem, but today things that used to take two people five minutes right now are being scheduled for 60 minute calls next week. There are too many meetings, companies don’t feel connected and culture is off, and there are too many software tools that don’t work and add up to a large cost.

We need to get back to technology that supports the workflow, not the reverse.

Roam is an all-in-one Cloud HQ designed to bring a whole distributed company together in one headquarters.

Roam makes companies:

- more productive with shorter meetings
- more connected with a map that gives a feeling of working together without meeting
Stanford team piloting the future of hybrid work

Helping match Bay Area companies to split office space
Example space pairing agreement:

- **Company A** private space
- **Company B** private space

Mid-week turnover:
- M-W: Company A
- Th-F: Company B
WFH highest in large cities and university towns

Notes: Share of vacancy postings offering a job that allows 1+ days remote working per week. From 7 million online US jobs from January and February 2023. Lightcast.

Source www.wfhmap.com