

VELUX WFH OBSERVATORY

The Working From Home Experience

Region DACH

December 2021

Contents

VELUX®

- 03** **SETTING THE STAGE** >>>
Background, objectives, and methodology
- 05** **EXECUTIVE SUMMARY** >>>
Key insights and takeaways
- 08** **HABITS AND BEHAVIOR** >>>
Current WFH behavior and satisfaction
- 20** **PAINPOINTS AND BENEFITS** >>>
Advantages and disadvantages of WFH
- 31** **HOME IMPROVEMENTS** >>>
Impact on home improvement priorities
- 42** **MOVING CONSIDERATIONS** >>>
Impact on dwelling and area priorities



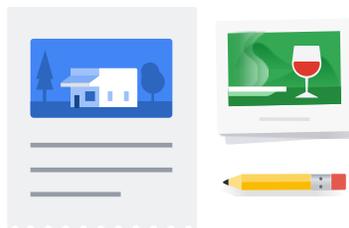
“Across 29 countries, 23% are now working more from home than before, and 35% would prefer to work from home completely or more often than they used to in the future.

Yet, many feel burned out (33%), disengaged from work (37%), or unproductive (38%) when they do so.”

(Ipsos, Workplace Report, 2021)

RESEARCH SETUP

SAMPLING AND SCOPE



Data collection methodology

A quantitative **survey** is conducted online across 16 countries to identify attitudes and behaviors in relation to the working from home phenomenon and related home improvements.

The survey was administered as device agnostic to allow respondents to complete on all type of devices (PC, tablet & smartphone), thereby guarding against response bias.



Target sample

Naturally, representative samples for each country population with representation on age, gender, and region.

Screening on home ownership (500 of 1000 homeowners), working arrangements (min. one day working from home per week), and demographics.



Countries and sample size

Data collected from 1000 respondents in each of 16 markets across five regions*.

Region DACH (Germany, Switzerland, Austria)

Region NWE (Netherlands, Belgium, Denmark, Sweden, UK, Ireland)

Region PacRim+ (US, Australia)

Region CEE (Czech Republic, Poland)

Region SE (Spain, France, Italy)

*Feasibility limited to 500 in Ireland

MAIN THEMES OF THE RESEARCH

STRUCTURING THE QUESTIONNAIRE

Respondents were screened for home ownership, working arrangements, and demographics to ensure relevant sample composition and representation.

The questionnaire was structured to capture current WFH behavior, including experiences with WFH, advantages and disadvantages, and active measures taken to adapt and/or improve their WFH situation.

As an element in this, respondents will be asked to identify key needs or jobs when WFH, as well as to assess the extent to which these needs/jobs are currently being met and how. This JTBD approach will help identify opportunity spaces in relation to WFH that VELUX can look to tap into.



Screening

Screening

Screening on home ownership and working arrangements. Stratification is based on age, gender, region, income/education, and household size.



WFH Behavior

WFH Behavior

Respondents were asked about their current behavior when WFH, including their satisfaction or dissatisfaction, advantages and challenges, and home improvements made, all of which will help understand how each respondent is currently engaged in WFH.



WFH Experience

WFH Experience

Having mapped the WFH behavior of each respondent, they were tasked with elaborating on their experiences when WFH, including their WFH setting and atmosphere, and the implications for their health, well-being, productivity, and moving considerations.



Jobs to be Done

Home Improvements and Jobs to be Done

To more fundamentally understand the drivers and motivations of WFH behavior, respondents were asked to describe the key needs/jobs that WFH helps them address. Moreover, respondents were asked to evaluate how well they find that these needs/jobs are currently being met when working from home.



Background

Background questions

A number of background questions ranging from demographics, residence/dwelling, and their VELUX segment association.

CAPITALIZING ON THE WFH MOMENTUM

AN EVOLVING AND PERMANENT CHANGE

In this study, as in multiple other studies across the world, the seismic shift in the share of people working from home is confirmed. Our data confirms that while WFH is a prevalent and seemingly permanent phenomenon, it happens despite some dissatisfaction and with various mitigation strategies that indicate a **potential for providing more long-term solutions for a positive WFH experience.**

01

Working from home as a phenomenon has been cemented with 41% of our global sample working from home five days per week, and 50% or more in all countries except Australia (48%) believing that their current split between office and home is either well-balanced or they would want to work from home more.



MOMENTUM OF WFH

02



CORE WFH CHALLENGES

Despite the prevalence of working from home arrangements, and despite all of the associated benefits, 45% are dissatisfied with parts of working from home, especially in terms of professional sacrifices such as closeness to colleagues and felt appreciation, as well as poorer working environments at home.

03

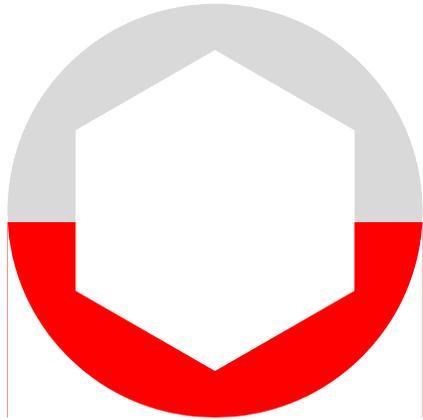
The satisfaction with working from home is contingent on a range of factors, and some of the most important and significant relate directly to key VELUX offerings, including the quality of light available, the room temperature, and the air quality in the space used for working from home.



DRIVERS OF SATISFACTION

KEY INDICATORS OF BUSINESS POTENTIAL

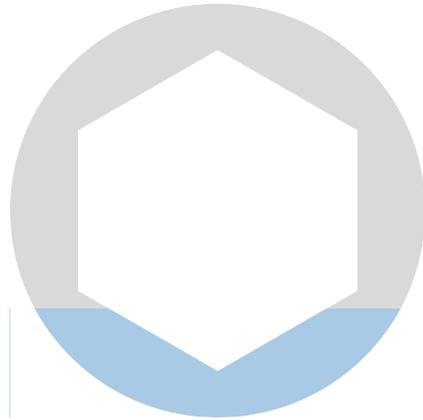
NON-NEGOTIABILITY AND CONTINUED SPENDING



45%

HIGH-TIER BUDGETS

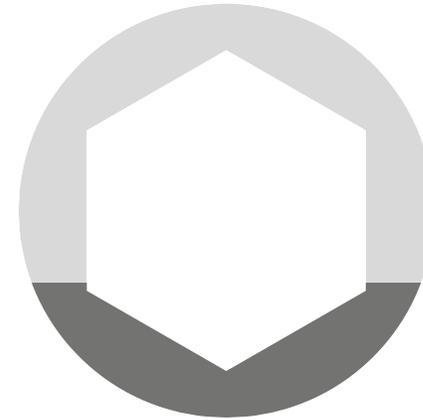
Compared to projects already completed, there is an increase of between 3-21% across countries in the share of people budgeting to spend one of the three highest tier brackets on forthcoming home improvements – leading to an average of 45% of people now planning to spend in this budget range.



22%

WINDOW INVESTMENTS

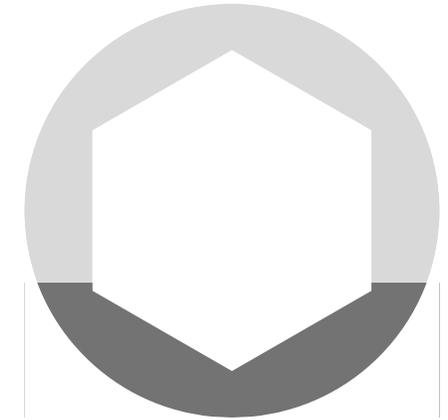
Aside from investing in new furniture or painting and redecoration, installing or replacing windows remains the most popular choice for home improvements to support working from home – and comparing completed to planned projects, there is an increase from 18% to 22% of people planning to invest in windows.



30%

NON-NEGOTIABILITY

Dedicated home offices rank in line with kid's bedrooms, dining rooms, and guest rooms in terms of importance when moving, indicating how they are now viewed as a key selling point – and indeed as non-negotiable for more than 30% - especially those working from home a lot.



29%

MOVING FOR WFH

10% have moved to better support working from home and another 19% have considering moving. Specifically, some of the most important considerations when moving are to ensure better daylight, better indoor climates, reduced noise, and more air freshness.

CURRENT HABITS & BEHAVIORS

KEY CHAPTER INSIGHTS

CURRENT HABITS & BEHAVIOURS



#1: The Momentum of WFH

Working from home as a phenomenon continues to grow with 41% of our global sample working from home five days per week, and **50% or more** in all countries except Australia (48%) believing that their current split between office and home is **either well-balanced or would want more working from home** (between 16-27% do not care or do not know).

#2: WFH Despite Challenges

Despite the prevalence of working from home arrangements, and despite all of the associated benefits, **45% say that they are dissatisfied** with parts of working from home to some extent, especially so among the Family and Indoor Climate Focused, Status Seekers, and DIY Price Conscious segments.

#3: Room For Better Solutions

In all but a few countries, between 25-43% work from tertiary locations as a supplement to working from home. Coffee shops are the most popular location, but **less than 20% find them truly suitable** for work. Similarly, fewer than 25% globally have a dedicated home office, indicating that **more satisfactory and permanent solutions are in demand**.



back to
Content Overview



Explore #1:
The Momentum of WFH



Explore #2:
WFH Despite Challenges



Explore #3:
Room for Better Solutions



move on to
next chapter

#1: THE MOMENTUM OF WFH

CURRENT HABITS & BEHAVIOURS

More than

40% are working five days per week from home, and only 12% work just one day from home

Despite this, another 25% are stating that they would ideally want to work more from home every week, and only 16% would want to decrease it.

The propensity to work more from home is less pronounced in the SE and DACH regions, as well as in the Family and Indoor Climate Focused segment, who are also more dissatisfied with working from home.

Interestingly, this segment is especially focused on the professional disadvantages of working from home, including being interrupted more often and feeling less appreciated by colleagues



back to
Content Overview



Explore #1:
The Momentum of WFH



Explore #2:
WFH Despite Challenges



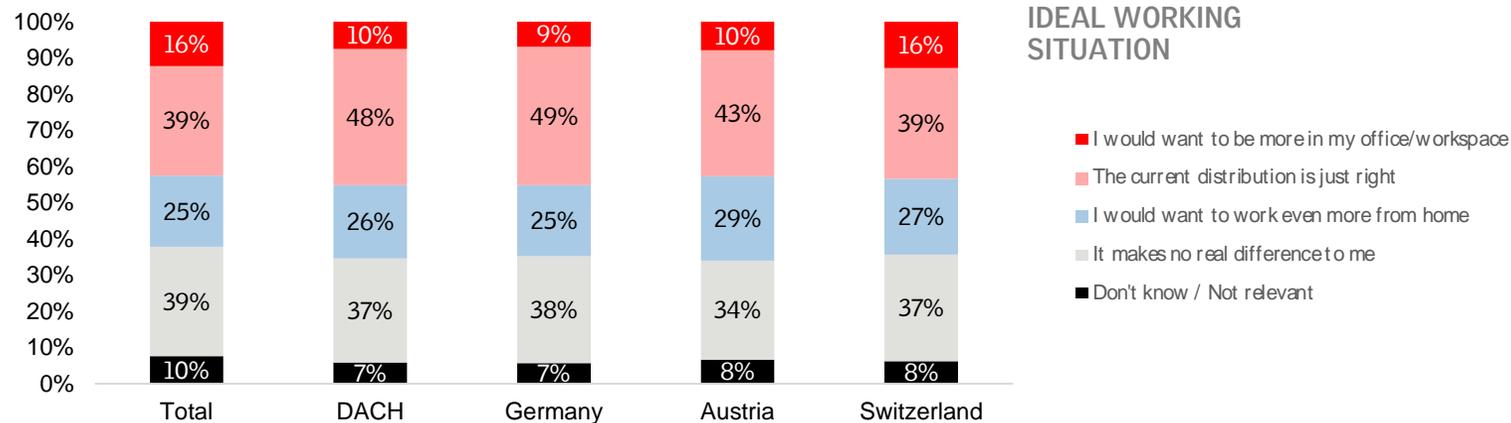
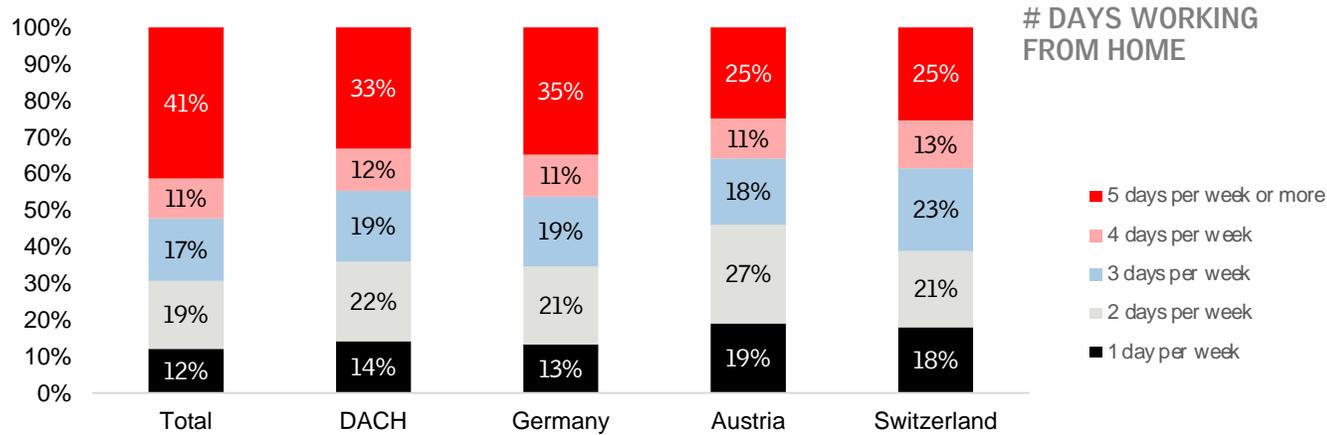
Explore #3:
Room for Better Solutions



move on to
next chapter

#1: The Momentum of WFH

Working from home as a phenomenon continues to grow with 41% of our global sample working from home five days per week, and 50% or more in all countries except Australia (48%) believing that their current split between office and home is either well-balanced or would want more working from home.



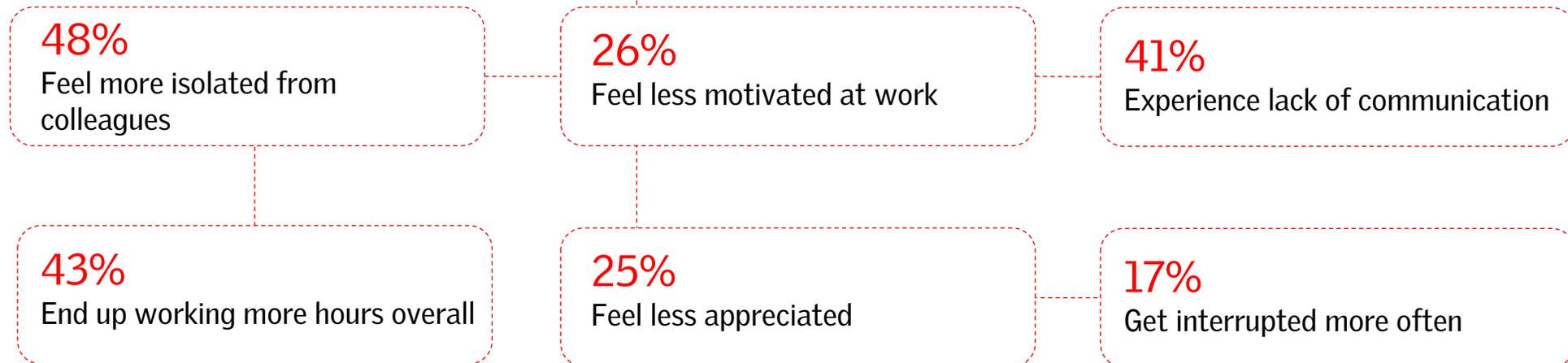
#2: WFH DESPITE CHALLENGES

CURRENT HABITS & BEHAVIOURS

45%

Display some degree of dissatisfaction with WFH

While only a marginal share of respondents (4.5 %) are highly dissatisfied with working from home, there is some degree of discontent among a wider group, especially among the Family and Indoor Climate Focused, Status Seekers, and DIY Price Conscious segments.



back to
Content Overview



Explore #1:
The Momentum of WFH



Explore #2:
WFH Despite Challenges



Explore #3:
Room for Better Solutions

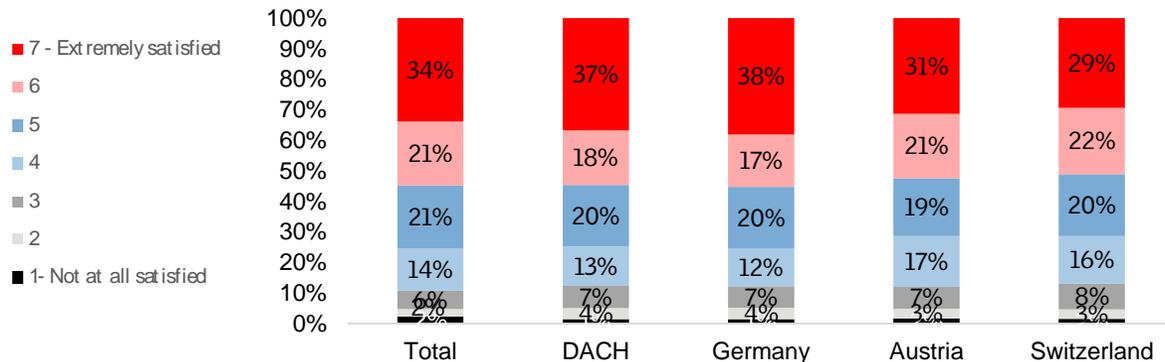


move on to
next chapter

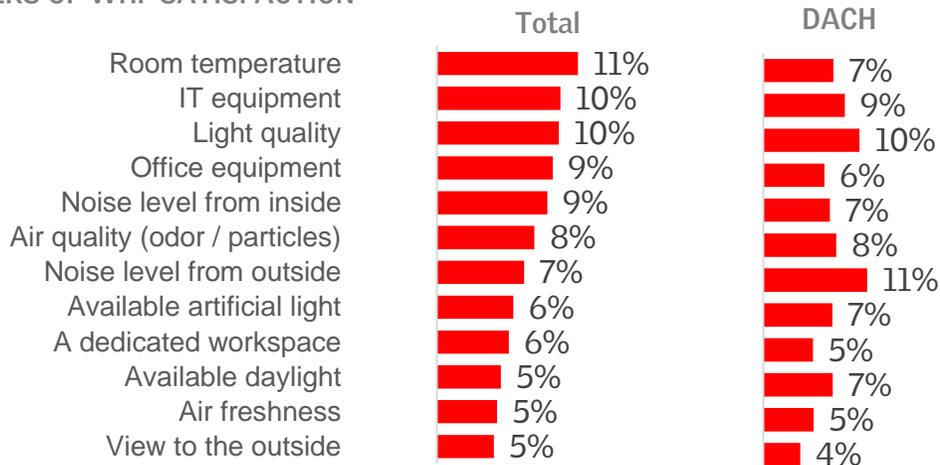
#2: WFH Despite Challenges

Despite the prevalence of working from home arrangements, and despite all the associated benefits, 45% say that they are dissatisfied with parts of working from home to some extent, especially so among the Family and Indoor Climate Focus, Status Seekers, and DIY Price Conscious segments.

SATISFACTION WITH WFH



DRIVERS OF WFH SATISFACTION



PERSONAL PAINS AND GAINS

This table provides an overview and direct comparison of how many agree with the advantages and disadvantages of working from home. The red and green indications are used to demonstrate the overall alignment of the responses, with more green brackets indicating a greater share of agreement, while more red brackets indicate a lower share. Importantly, when brackets are either more deeply coloured or given a white hew, this indicates either positive or negative deviation compared to the average of scores for that particular item (row).

	Total n: 15504	DACH n: 2205	Germany n: 1000	Austria n: 1000	Switzerland n: 1000
Makes me feel more free	75%	73%	73%	72%	73%
Gives me more free time	70%	65%	66%	61%	68%
Improves my overall quality of life	70%	71%	72%	65%	70%
Allows me to spend more time with my family and/or friends	68%	63%	64%	59%	62%
Helps improve my mental health	59%	52%	52%	52%	53%
Helps improve my physical health	52%	52%	52%	50%	52%
Deteriorates my physical health	25%	24%	24%	24%	30%
Deteriorates my mental health	23%	23%	23%	23%	27%
Deteriorates my overall quality of life	22%	25%	25%	23%	25%
Makes me feel less free	22%	21%	21%	19%	24%
Gives me less free time	21%	22%	21%	21%	26%
Makes me spend less time with my family and/or friends	21%	21%	20%	20%	28%

PROFESSIONAL PAINS AND GAINS

This table provides an overview and direct comparison of how many agree with the advantages and disadvantages of working from home. The red and green indications are used to demonstrate the overall alignment of the responses, with more green brackets indicating a greater share of agreement, while more red brackets indicate a lower share. Importantly, when brackets are either more deeply coloured or given a white hew, this indicates either positive or negative deviation compared to the average of scores for that particular item (row).

	Total n: 15504	DACH n: 2205	Germany n: 1000	Austria n: 1000	Switzerland n: 1000
Makes my workdays more flexible	76%	75%	75%	75%	76%
Makes me organize my day more effectively	65%	71%	72%	71%	69%
Makes me more productive and/or effective in my tasks	62%	62%	62%	60%	65%
Makes my workdays less stressful	61%	60%	60%	54%	65%
Makes me like my job more	59%	53%	53%	51%	56%
Makes me feel more motivated at work	52%	55%	54%	52%	57%
Makes me feel more isolated from my colleagues	48%	40%	38%	39%	55%
Makes me experience less anxiety about social situations at work	47%	34%	33%	31%	39%
Makes me feel more confident at work	47%	41%	41%	39%	45%
Makes me work more hours overall	43%	41%	40%	41%	49%
Makes me more able to make an impact at work	41%	28%	27%	25%	45%
Creates a lack of communication with coworkers, customers, clients	41%	38%	37%	38%	47%
Makes me work fewer hours overall	35%	38%	38%	36%	33%
Improves the communication with coworkers, customers, clients	31%	26%	25%	25%	30%
Makes me feel more appreciated by my colleagues for my skills and contributions	29%	23%	22%	23%	27%
Makes me less able to make an impact at work	28%	25%	25%	24%	31%
Makes me organize my day less effectively	26%	27%	27%	24%	30%
Makes me feel less motivated at work	26%	23%	22%	22%	30%
Makes me feel closer connected to my colleagues	26%	25%	25%	22%	28%
Makes me feel less appreciated by my colleagues for my skills and contributions	25%	20%	20%	18%	27%
Makes me less productive and/or effective in my tasks	24%	24%	23%	23%	30%
Makes my workdays more stressful	24%	25%	25%	25%	27%
Makes me experience more anxiety about social situations at work	23%	22%	21%	23%	29%
Makes my workdays less flexible	23%	22%	22%	23%	27%
Makes me feel less confident at work	22%	20%	19%	18%	27%
Makes me dislike my job more	22%	20%	19%	20%	28%

#3: ROOM FOR BETTER SOLUTIONS

CURRENT HABITS & BEHAVIOURS

29% globally work from one or more tertiary locations as a substitute from working out of their own home or their office workspace. In countries such as Czech Republic, Ireland, Denmark, and Switzerland, this figure exceeds 40%.

Seeking out different settings

For those tertiary workspaces that are viewed as being less suitable (e.g. coffee shops, cultural locations, public parks), one of the key reasons why they are used is **to provide a change of scenery, a place away from distractions** (e.g. family), or a place to disconnect from everyday life.



Seeking out better accommodation

Aside from seeking something simply different, many of the tertiary locations are perceived to provide clear benefits in terms of lighting, air quality and freshness, and a better view to the outside, meaning **these locations are not just something to be regarded as necessary dispersions** when working from home.

Instead, they act as locations that are used to accommodate elements that are sometimes seen as lacking from the home office location. When individuals are choosing sub-optimal locations to compensate for light quality, air quality, and similar elements, it **indicates the need and potential for better solutions in the home office.**



back to
Content Overview



Explore #1:
The Momentum of WFH



Explore #2:
WFH Despite Challenges

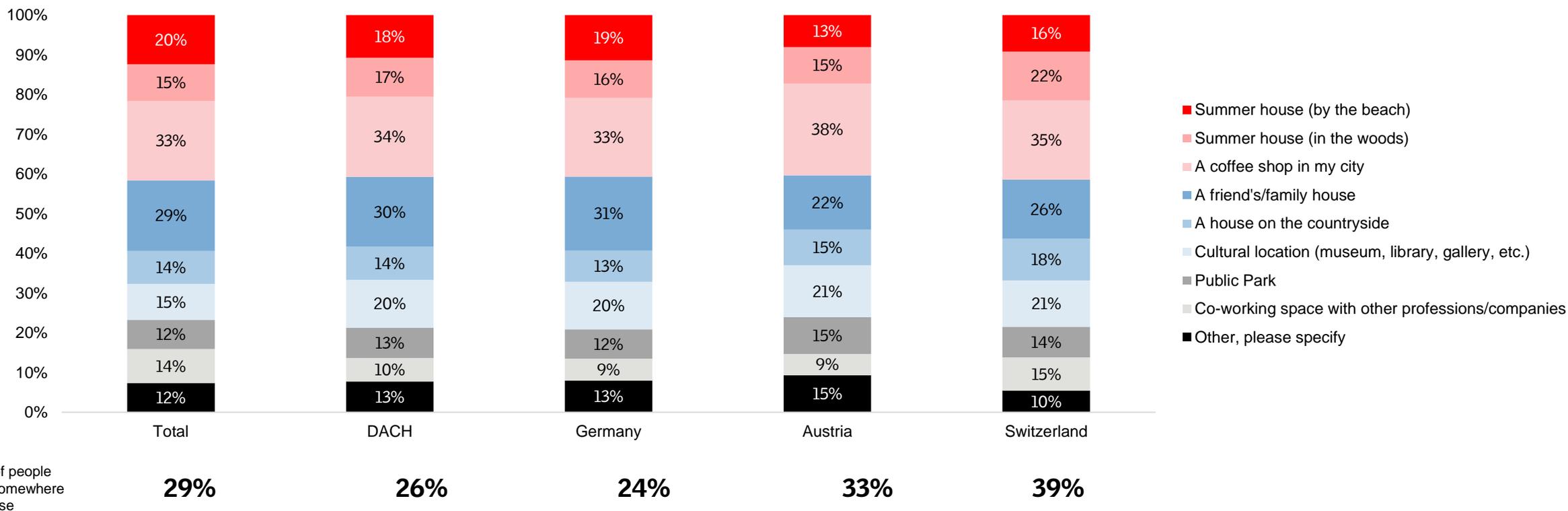


Explore #3:
Room for Better Solutions



move on to
next chapter

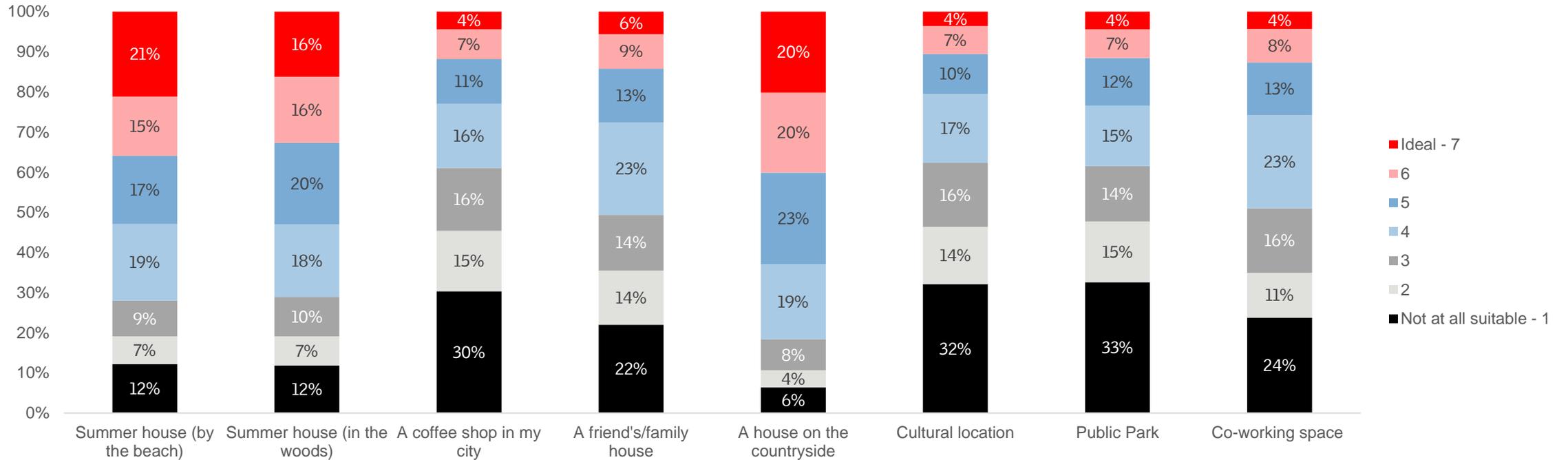
TERTIARY LOCATIONS



	Total	DACH	Germany	Austria	Switzerland
Total, n=	4573	579	242	333	390

SUITABILITY OF TERTIARY LOCATIONS

DACH



	DACH
Total, n=	2205

BENEFITS OF TERTIARY LOCATIONS

DACH

Summer house (by the beach)

Summer house (in the woods)

A coffee shop in my city

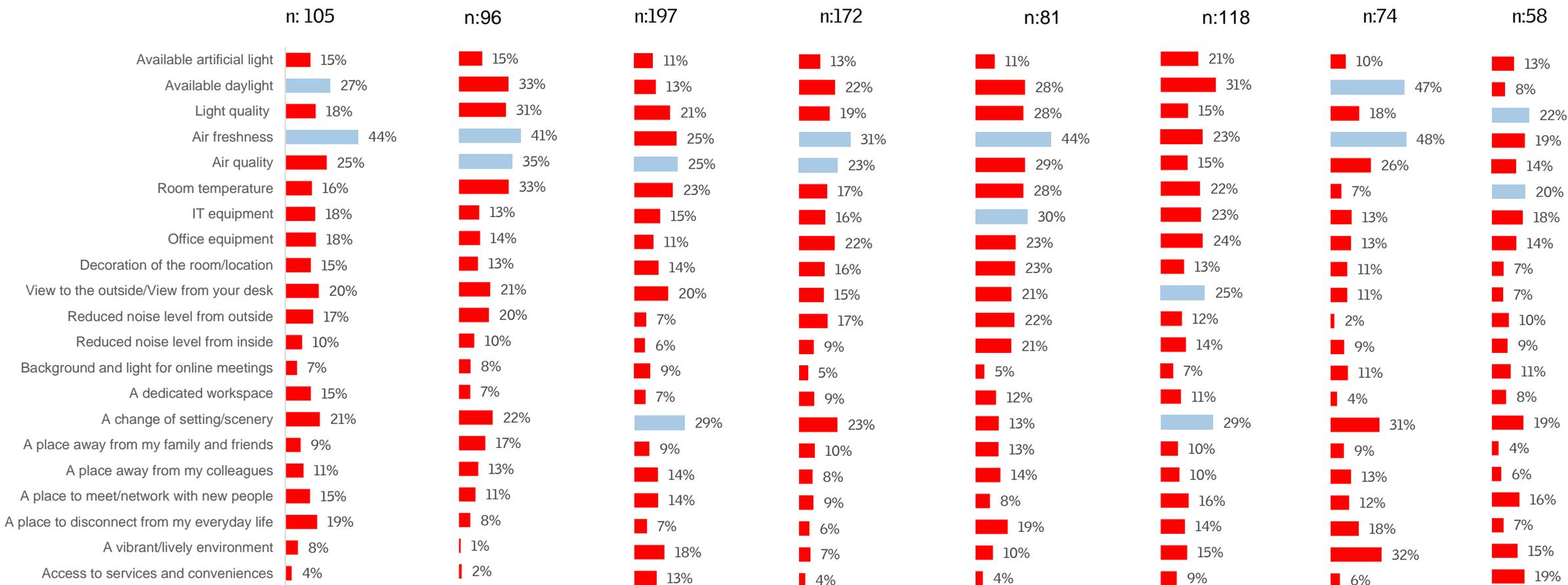
A friend's/family house

A house on the countryside

Cultural location

Public Park

Co-working space





WFH PAIN POINTS & BENEFITS

KEY CHAPTER INSIGHTS

WFH PAINPOINTS AND BENEFITS



#1: Healthy Lifestyles

Working from home enables **very practical or tangible benefits**. More than 50% claim to be able to organize their day better, save commuting time, run errands during the day, save money, or similar. On the other hand, between 30-40% claim to experience a greater quality of life, less stress, a feeling of being more productive and free, all of which point to **more mental benefits of working from home**.

#2: Practical Sacrifices

For all its benefits, working from home does come with drawbacks or sacrifices that are made as part of working outside of a dedicated office space. As such, 48% claim to feel more isolated, 40% state that their communication with colleagues or clients suffers, and 12% highlight the **poorer working environment and/or equipment available**.

#3: Confident Introverts

Individuals who score more highly on introversion stand out in that they **experience certain benefits more strongly** than others, including improved mental health, closer connection to colleagues and better communication, job motivation and job liking, reduced anxiety, greater confidence, and so on, while practical benefits (e.g., saving on the commute) are less pronounced.



back to
Content Overview



Explore #1:
Healthy Lifestyles



Explore #2:
Practical Sacrifices



Explore #3:
Confident Introverts



move on to
next chapter

#1: HEALTHY LIFESTYLES

WFH PAINPOINTS AND BENEFITS



Practical benefits are key advantages of WFH, along with workday flexibility

Benefits concerning commuting time, money saved, and more flexible professional schedules are recognized by most of the sample as being advantages of working from home.

Mental benefits are felt more strongly than professional benefits

While fewer overall recognize benefits such as improved mental health, improved quality of life, and more free time, the people that do experience them agree more strongly that these elements are advantages of WFH.



Future home investments are motivated more by mental benefits compared to professional benefits

The decision to invest in home improvements is related to the kinds of benefits experienced by the homeowner.

While practical benefits is the most important driver, it is noteworthy that those who recognize mental benefits of WFH are significantly more likely to plan and conduct home improvements than those recognizing only professional benefits.



back to
Content Overview



Explore #1:
Healthy Lifestyles



Explore #2:
Practical Sacrifices



Explore #3:
Confident Introverts



move on to
next chapter



WORKING FROM HOME BENEFITS

Total
n: 15504

DACH
n: 2205

Germany
n: 1000

Austria
n: 1000

Switzerland
n: 1000

Professional (Min. 2 professional benefits chosen):

68%

68%

Mental (Min. 2 mental benefits chosen):

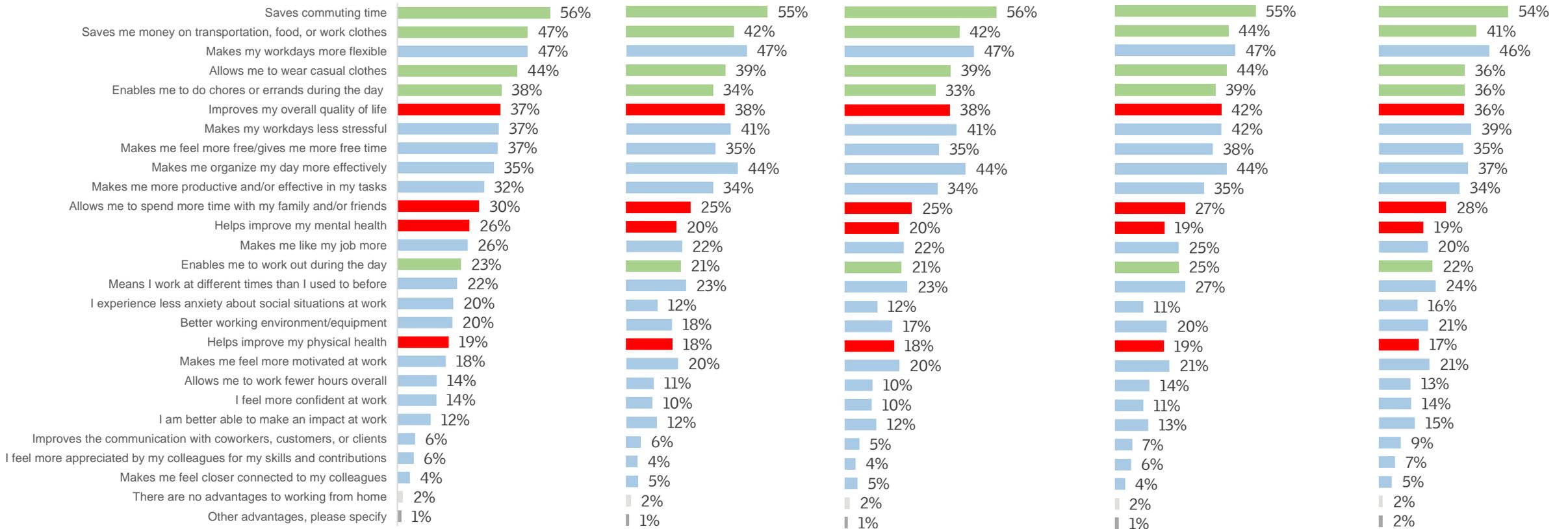
41%

37%

Practical (Min. 2 practical benefits chosen):

57%

54%



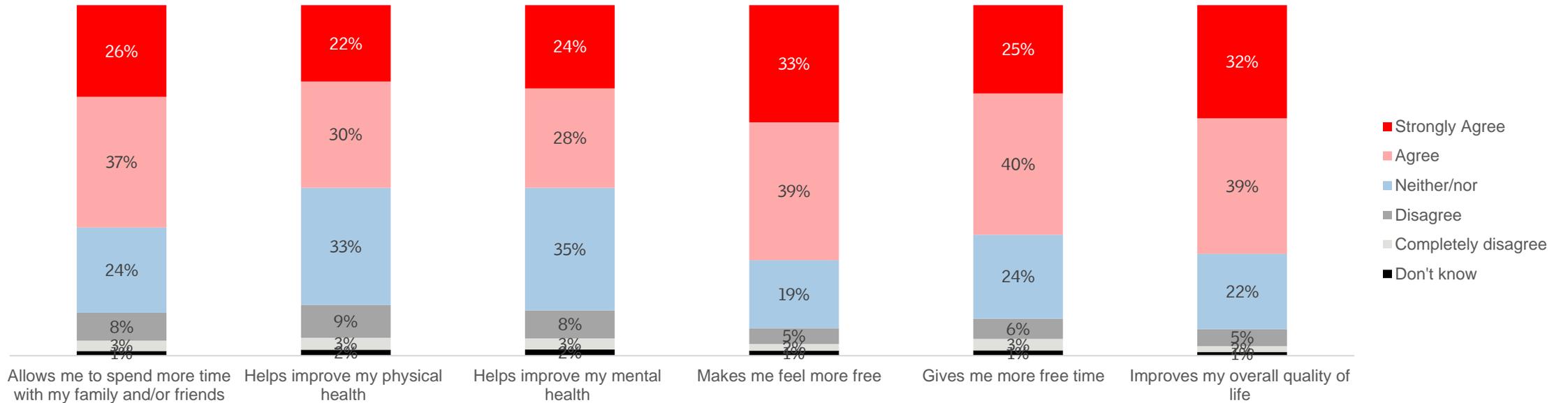
Professional benefits Practical benefits
Mental benefits

MENTAL BENEFITS

This table and the table in the next slide provide an overview of the extent to which respondents believe that each of the mental and professional benefits apply to them and their situation.

While there is significant variation across both mental and professional benefits in terms of how strongly respondents experience each of them, the share of respondents strongly agreeing with the mental benefits is significantly higher (18%) than the same share for the professional benefits (13%), while the average share of respondents simply agreeing is comparable (26% for both).

Moreover, some of the highest shares agreeing strongly among the professional benefits are found for benefits that veer closely to more personal or mental benefits, such as feeling more motivated, making workdays less stressful, liking the job more, and experiencing less anxiety.



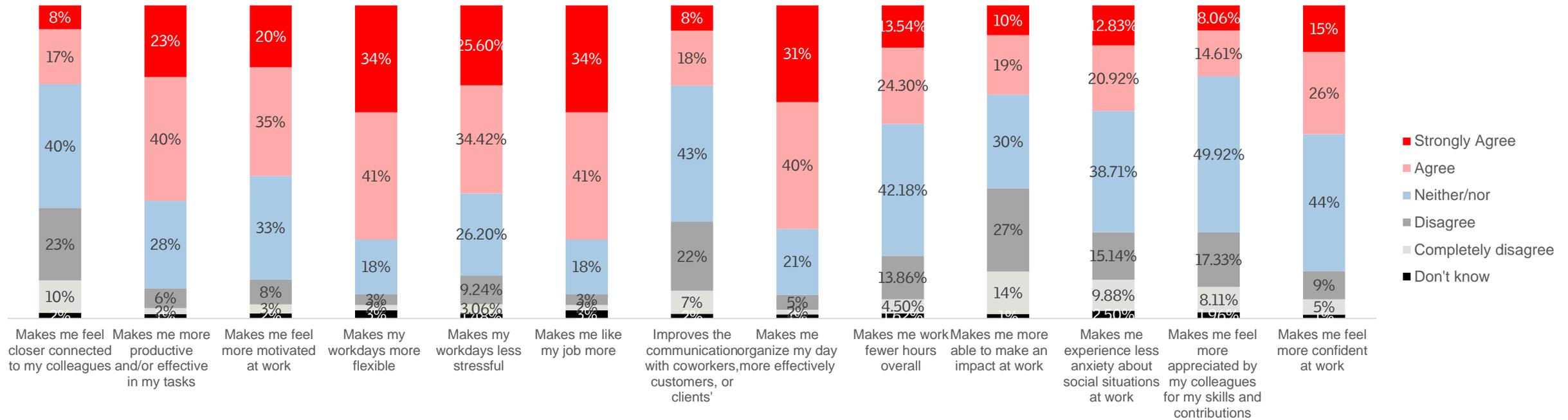
	DACH
DACH, n=	2205

PROFESSIONAL BENEFITS

This table and the table in the previous slide provide an overview of the extent to which respondents believe that each of the mental and professional benefits apply to them and their situation.

While there is significant variation across both mental and professional benefits in terms of how strongly respondents experience each of them, the share of respondents strongly agreeing with the mental benefits is significantly higher (18%) than the same share for the professional benefits (13%), while the average share of respondents simply agreeing is comparable (26% for both).

Moreover, some of the highest shares agreeing strongly among the professional benefits are found for benefits that veer closely to more personal or mental benefits, such as feeling more motivated, making workdays less stressful, liking the job more, and experiencing less anxiety.



	DACH
Total, n=	2205

#2: PRACTICAL SACRIFICES

WFH PAINPOINTS AND BENEFITS



More than 40% make professional sacrifices

Both in terms of being isolated and losing out on effective communications with both clients, customers, and colleagues, working from home is recognized to be a potential sacrifice on these and related issues.

Similarly, for all its benefits in terms of flexibility, working from home is recognized as being a source of longer hours and generally more work.



A key reason why people choose to go to tertiary working locations (e.g. coffee shops) is to compensate for poor working environments at home

12% rank poorer working environments as a clear disadvantage of WFH, but more than 25% agree to experiencing it

Whether in terms of actual IT equipment, lighting and climate, or noise around the house, more than 25% recognize directly that they are impacted by poorer working conditions, which translate directly to a need for – and for the most part an intention to – invest in home improvements.



back to
Content Overview



Explore #1:
Healthy Lifestyles



Explore #2:
Practical Sacrifices



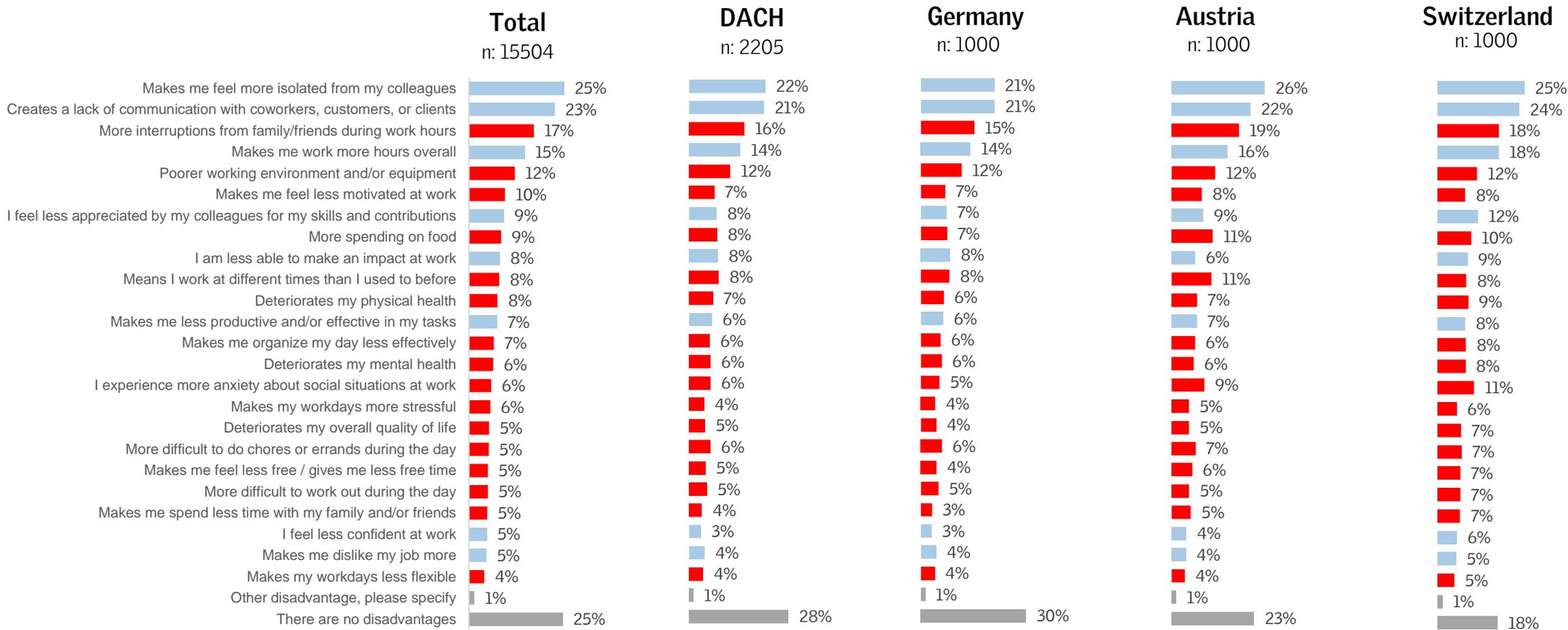
Explore #3:
Confident Introverts



move on to
next chapter



WORKING FROM HOME DISADVANTAGES



■ Professional sacrifices
 ■ Personal sacrifices

#3: CONFIDENT INTROVERTS

WFH PAINPOINTS AND BENEFITS

38% qualify as introverts in the present study in line with research on the topic (Myers-Briggs, 2020).

Introverts are **hypothesized to benefit more from working from home**, due in part to the reduction in direct exposure and the greater flexibility with which social situations can be managed.

Practical benefits are less important

Compared to more extroverted respondents, the introverted group assigns lower importance to practical upsides of working from home.

Saving commuting time and money is viewed as less important, along with such benefits as more organized working days and more free time.



Mental benefits are augmented

On the other hand, benefits that do not rank among the top concerns for extroverts become highly important aspects of working from home for the introvert.

Working from home is viewed more as a means of improving mental health, as a way of feeling more motivated and closer connected to colleagues, as an improvement of job liking and colleague communications, and as a means of reducing anxiety, feeling more confident, and more appreciated.



back to
Content Overview



Explore #1:
Healthy Lifestyles



Explore #2:
Practical Sacrifices



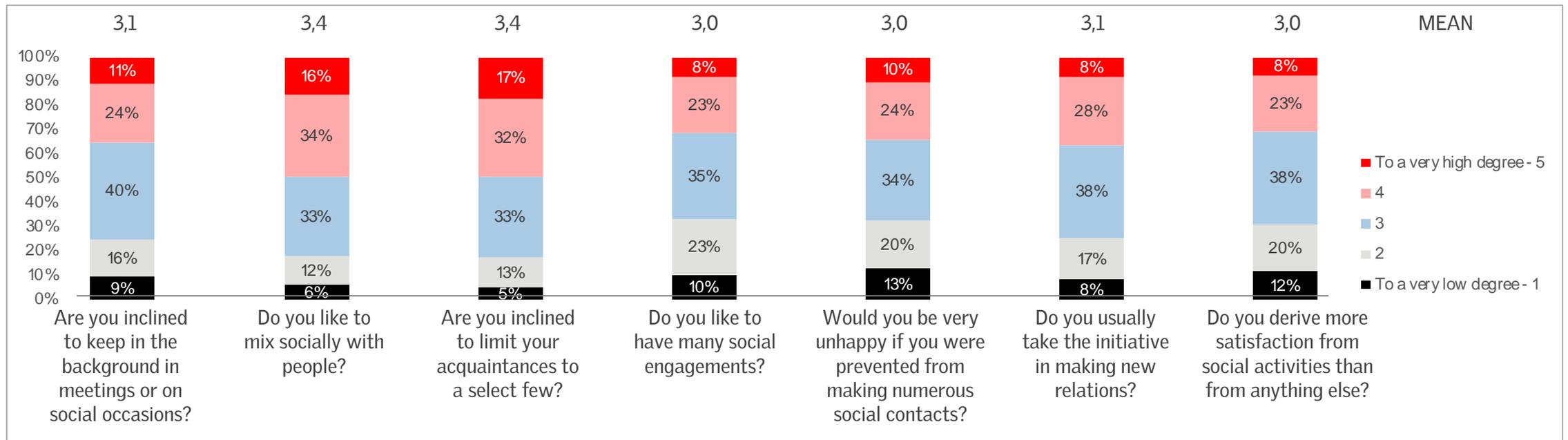
Explore #3:
Confident Introverts



move on to
next chapter

MEASURING INTROVERSION

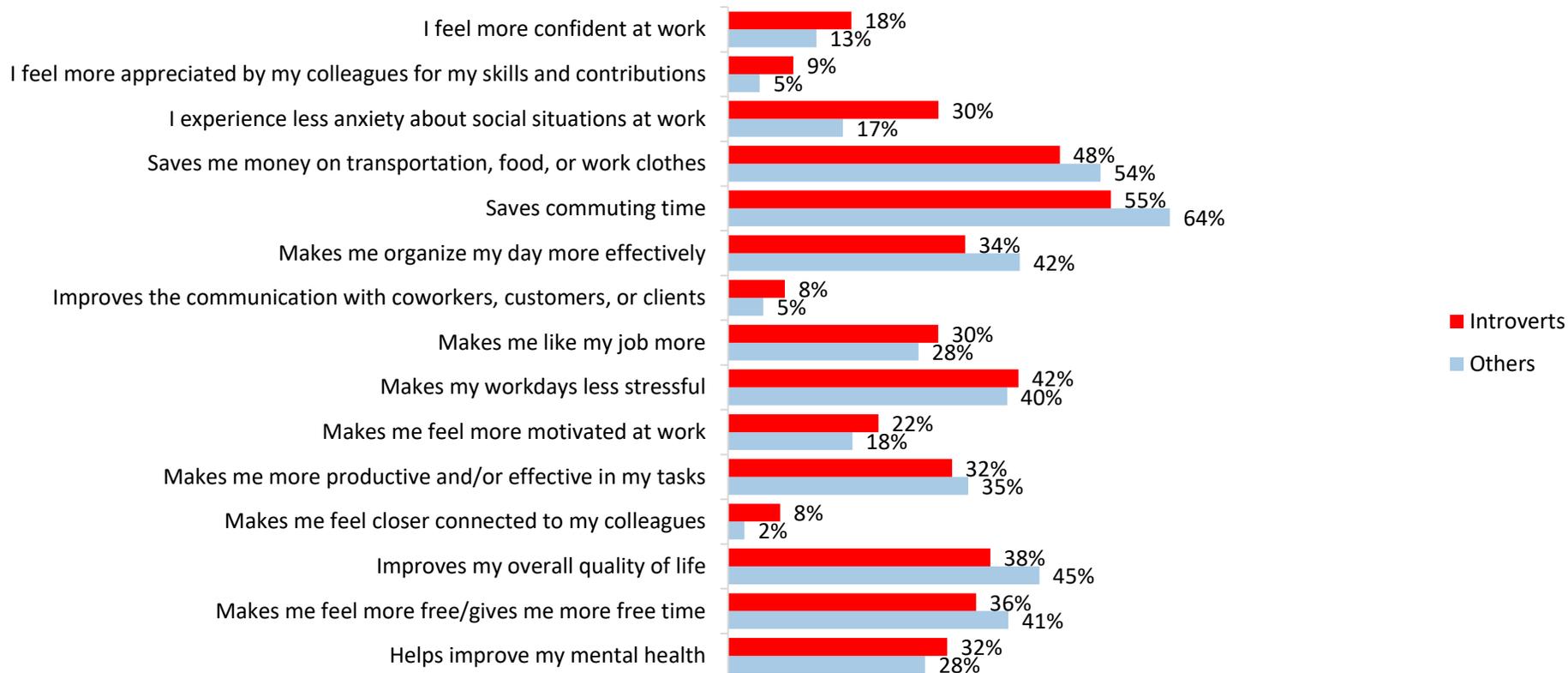
In the present study, introversion is measured using an adapted set of items adapted from Eysenck (1971). It captures the share of individuals in the sample that demonstrate agreement (either to some or a high degree) across seven distinct items correlating with introversion.



	Total
Total, n=	15504

INTROVERTS: ADVANTAGES OF WFH

Total



	Total
Total, n=	5596



IMPACT ON HOME IMPROVEMENTS

KEY CHAPTER INSIGHTS

IMPACT ON HOME IMPROVEMENTS



#1: Priorities for the Future

Completed home improvements in support of WFH had 18% installing or replacing windows, meaning this was the leading priority behind buying new furniture (72%) and painting/redecorating (49%). Looking ahead, there is an **increase in those who plan to install or replace windows (to 22%)**, signifying the largest increase of any category, along with a **general increase in the budget allocated** to make improvements.

#2: More WFH, More Improvements?

It would be natural to assume that those working from home more often or with greater commuting time would undertake more improvement projects. Instead, what is found is that **those alternating between WFH and their office**, especially those working 3 days from home a week, are **more likely to invest in improvements**.

#3: Pain or Gain?

One explanation for why those alternating between WFH and going to the office are more likely to invest comes from understanding their levels of satisfaction with WFH, and – more specifically - by understanding how their decisions are **driven more by mitigating perceived disadvantages** of WFH, as opposed to others who seek to augment the benefits of WFH.



back to
Content Overview



Explore #1:
Priorities for the Future



Explore #2:
More WFH, More Improvements?



Explore #3:
Pain or Gain?



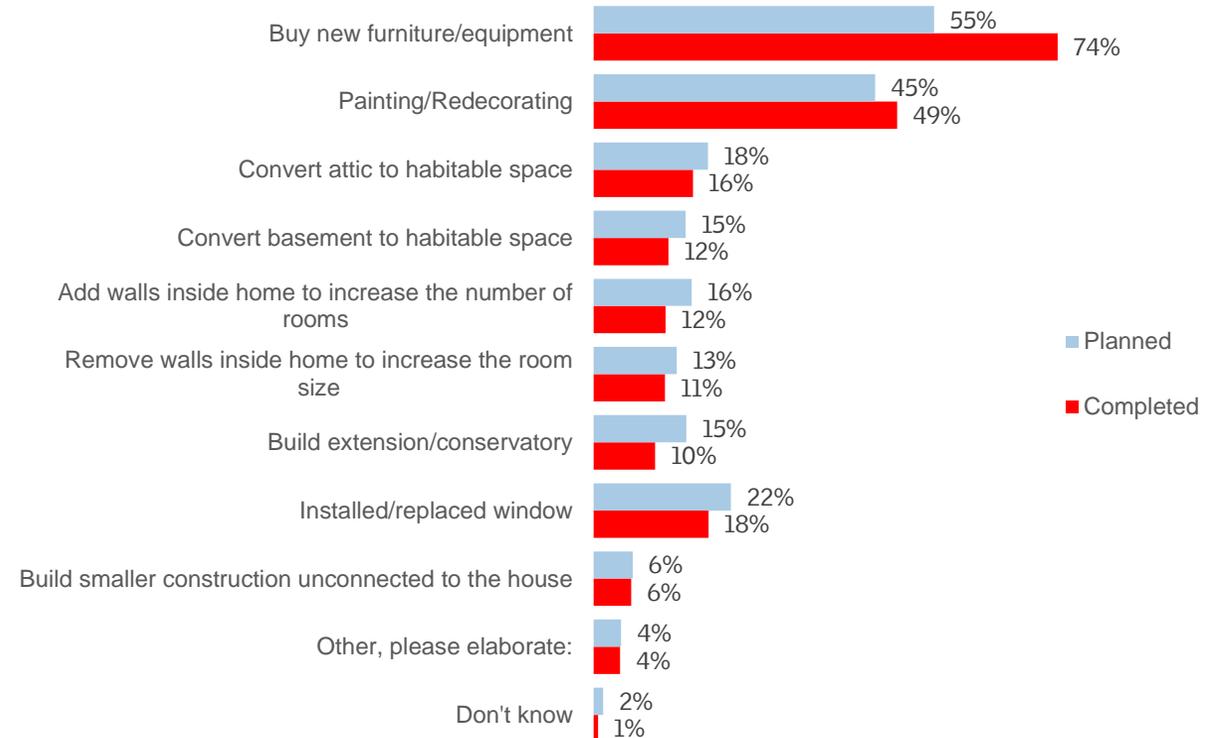
move on to
next chapter

#1: PRIORITIES FOR THE FUTURE

IMPACT ON HOME IMPROVEMENTS



Future planned home improvements will be less about new furniture and paint, while installing or replacing windows is growing and is the third most frequent home improvement option.



back to
Content Overview

Source: GUS (Central Statistical Office)



Explore #1:
Priorities for the Future



Explore #2:
More WFH, More Improvements?

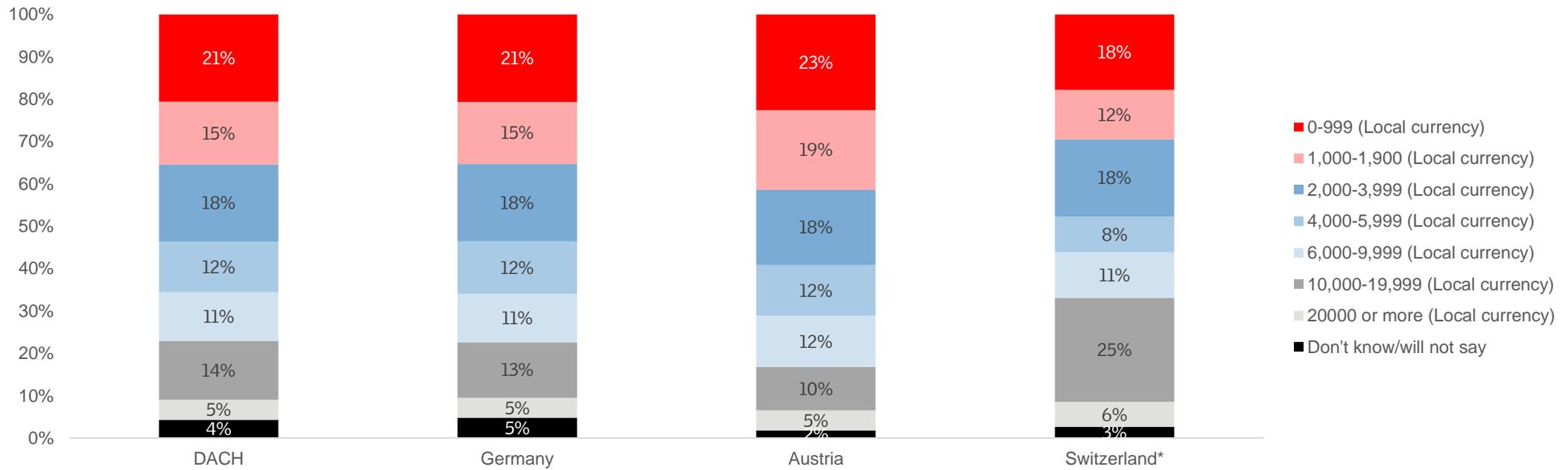


Explore #3:
Pain or Gain?



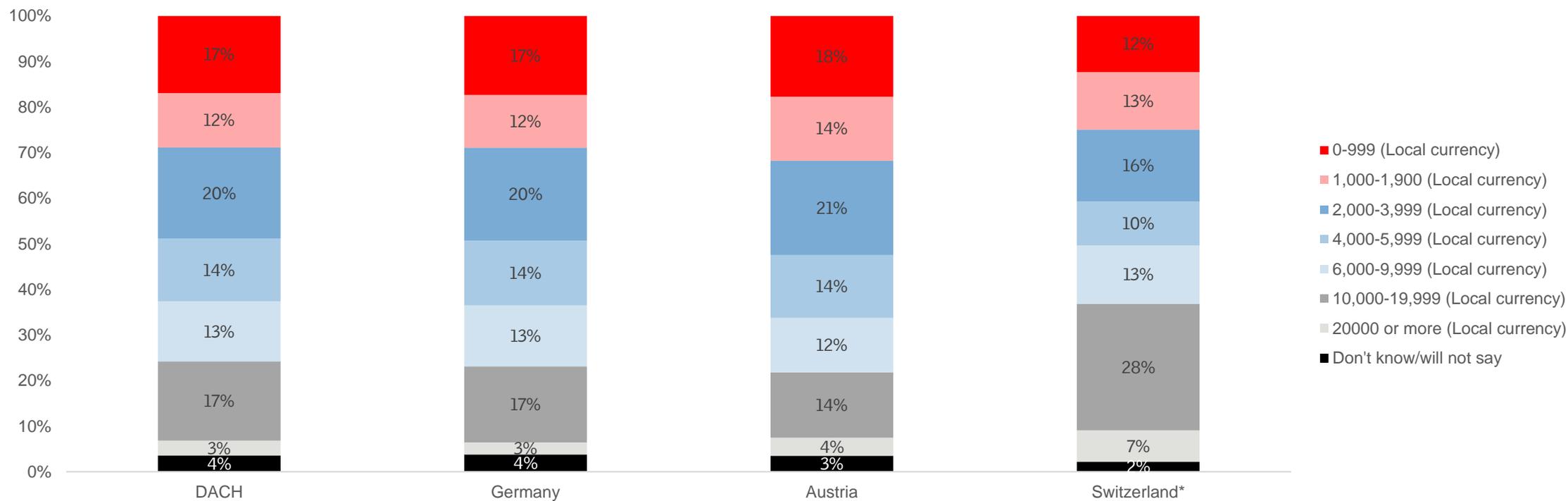
move on to
next chapter

BUDGETS: COMPLETED PROJECTS



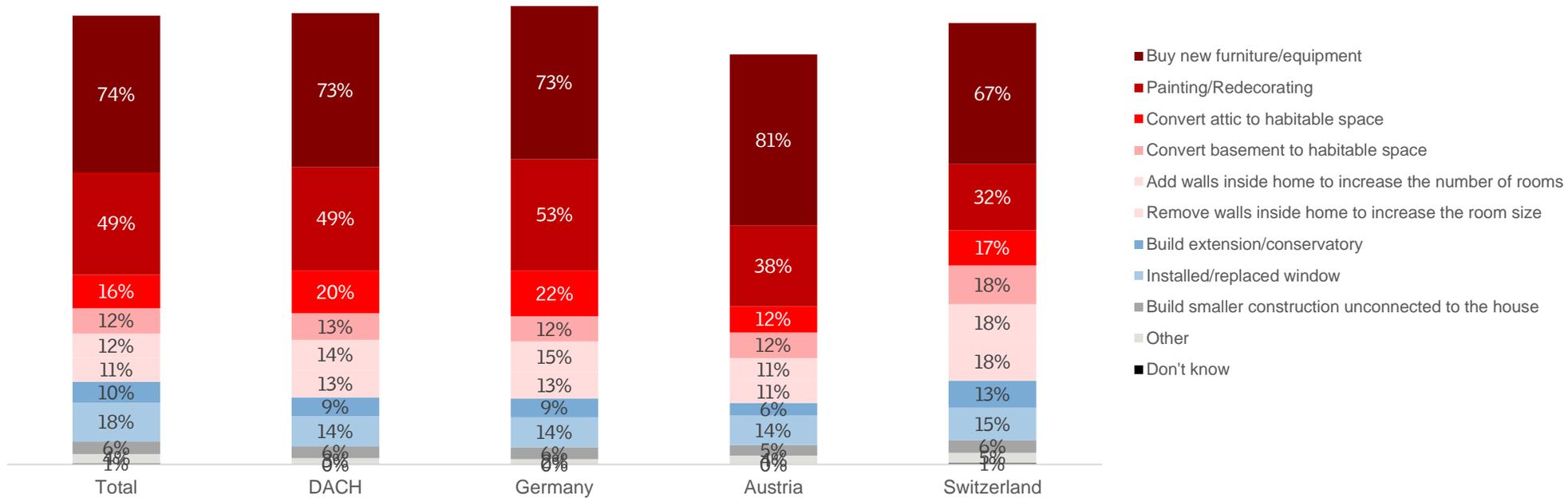
	DACH	Germany	Austria	Switzerland
Total, n=	905	395	515	459

BUDGETS: PLANNED PROJECTS



	DACH	Germany	Austria	Switzerland
Total, n=	739	323	429	355

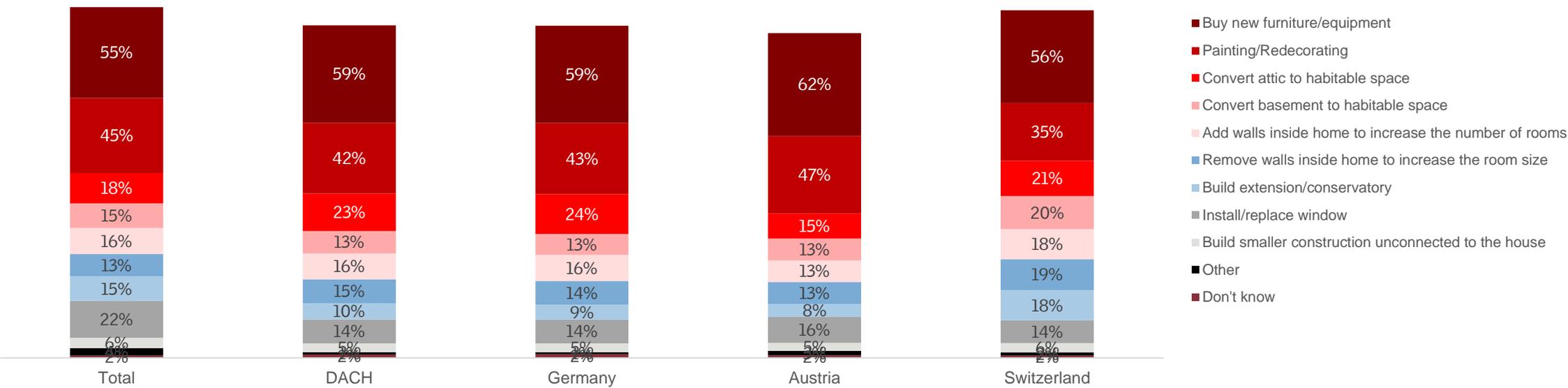
HOME IMPROVEMENTS: COMPLETED PROJECTS



	Total	DACH	Germany	Austria	Switzerland
Total, n=	6185	909	396	516	463



HOME IMPROVEMENTS: PLANNED PROJECTS



	Total	DACH	Germany	Austria	Switzerland
Total, n=	4971	755	331	436	361

#2: MORE WFH, MORE IMPROVEMENTS?

IMPACT ON HOME IMPROVEMENTS

3 days a week

While the data reveals that many of the experiences related to working from home, for instance some of the key benefits, are experienced more by those working from home more often, the same logic does not apply to home improvements.

Instead, home improvements are made more often by those who work from home part of the week. This is most clearly true for those who work from home 3 days per week, but also to a lesser extent for those who work from home 2 or 4 days per week.



Commuting time does not clearly explain the tendency to undertake home improvements. Both those being near and far from work will invest to WFH.

Children and Houses

On top of the relation between working from home and home improvements, the data also reveals that home improvements are driven by having kids and is particularly pronounced for house built between the years 1970-2005.



back to
Content Overview

Source: GUS (Central Statistical Office)



Explore #1:
Priorities for the Future



Explore #2:
More WFH, More Improvements?



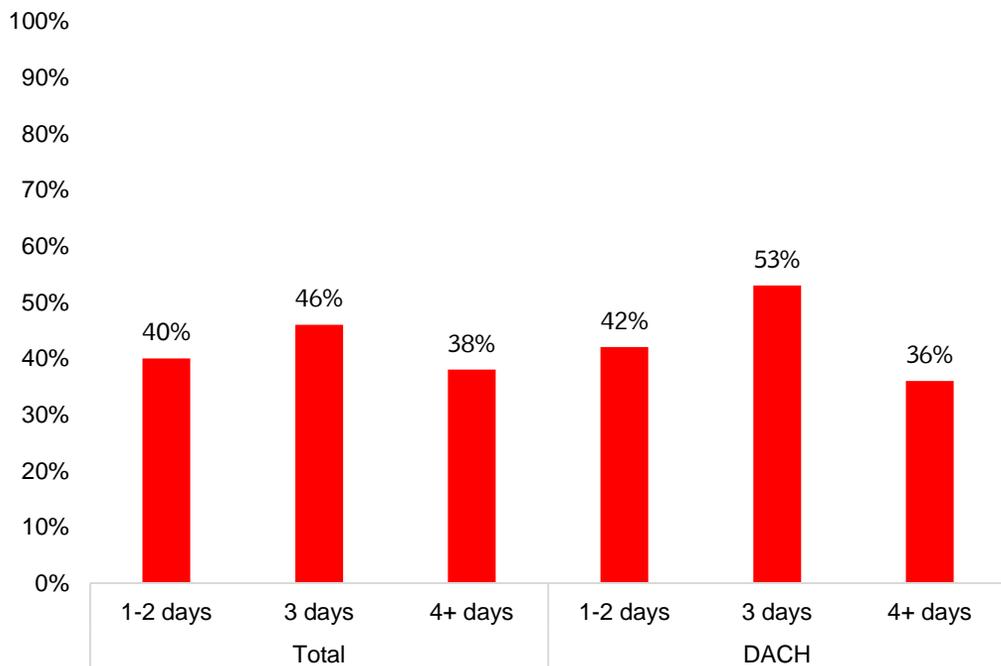
Explore #3:
Pain or Gain?



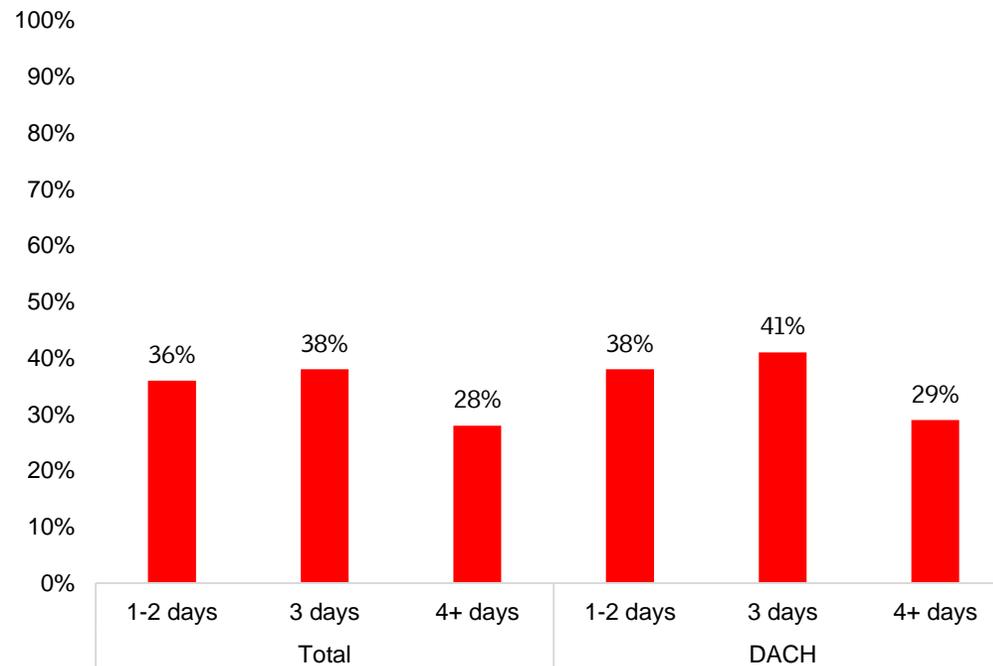
move on to
next chapter

HOME IMPROVEMENTS X DAYS WFH

DONE



CONSIDER



	Total	DACH
Total, n=	15504	2205

#3: PAIN OR GAIN?

IMPACT ON HOME IMPROVEMENTS



55% of the Status Seekers and Family and Indoor Climate Focus segments have conducted home improvements, and approx. 47% plan to do more.

This is markedly different from other segments, especially the Mature Stagers and Settled Empty Nesters.

Satisfaction and Home Improvements

Satisfaction with working from home is considerably lower in those segments that are seen to carry out more home improvements.

Exploring the causality of this, the data indicates that low satisfaction and the drive to make home improvements both relate to more severe personal/mental challenges experienced.



Sensitivity to professional and personal challenges

The Status Seeker and Family and Indoor Climate Focus segments experience professional challenges much more severely than other segments, and are also more challenged in terms of having to alternate between home office and workplace office locations.

This means that they generally do not experience mental benefits of WFH as much as other segments, as relates to their work performance, their health (both physical and mental), as well as the extent to which they experience certain benefits that other segments enjoy (e.g. flexibility, more free time as opposed to working longer hours).



back to
Content Overview



Explore #1:
Priorities for the Future



Explore #2:
More WFH, More Improvements?



Explore #3:
Pain or Gain?

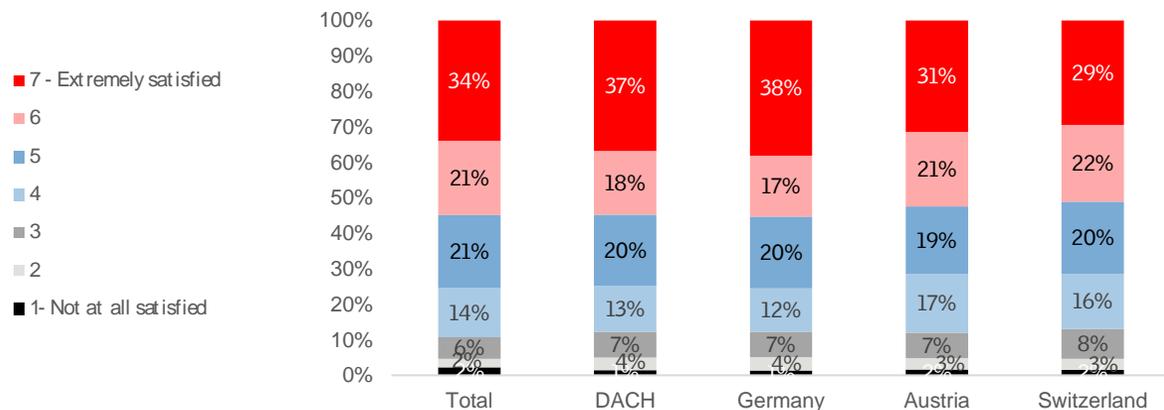


move on to
next chapter

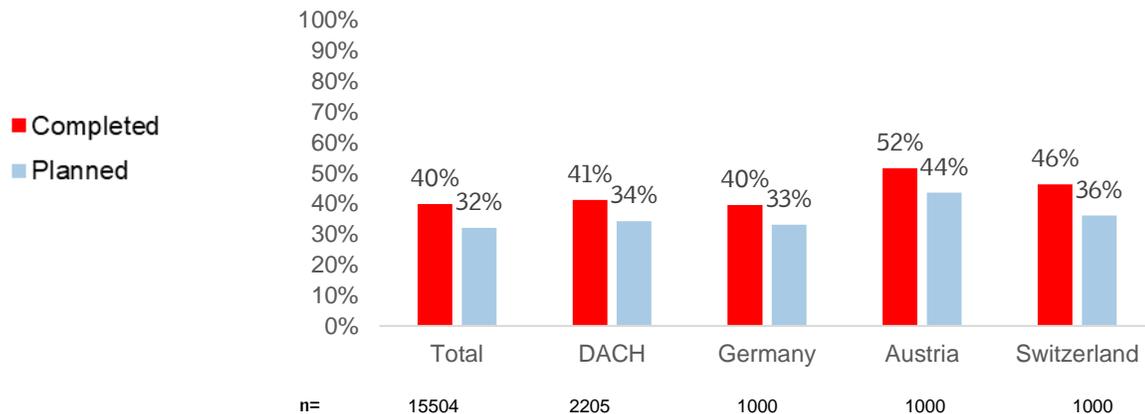
#3: Pain or Gain?

One explanation for why those alternating between WFH and going to the office are more likely to invest comes from understanding their levels of satisfaction with WFH, and – more specifically - by understanding how their decisions are **driven more by mitigating perceived disadvantages** of WFH, as opposed to others who seek to augment the benefits of WFH.

Satisfaction with WFH



Planned and Completed Home Improvements





**IMPACT ON MOVING
CONSIDERATIONS**

KEY CHAPTER INSIGHTS

IMPACT ON MOVING CONSIDERATIONS



#1: Work-Life Balance

The drive to augment the benefits of working from home impacts movement considerations. Specifically, some of the **most important considerations when moving** to either a new area or a new dwelling are to ensure **better daylight, better indoor climates, reduced noise, and more air freshness**. This applies especially to those that experience painpoints currently when working from home, and win out over e.g. floor plan, dwelling size, and decoration.

#2: Non-Negotiable Offices

Dedicated home offices of course cannot compete with rooms such as kitchens and adult bedrooms, but it is noteworthy that they **now rank in line with kid's bedrooms, dining rooms, and guest rooms**, indicating how home offices are now **viewed as a key selling point** – and indeed as **non-negotiable for more than 30%** - especially those working from home a lot.

#3: Different Segments, Different Moves

Despite the clear finding that moving considerations revolve around improving available daylight, indoor climate, and other relevant elements, **segments vary in their priorities when moving**. Specifically, Settled Empty Nesters, DIY Price Conscious, and Young Modern put greater emphasis on other elements as well, such as size, floor plan, dedicated home office, and closeness to nature, whereas the other segments prioritize more narrowly around light and air quality.



back to
Content Overview



Explore #1:
Work-Life Balance



Explore #2:
Non-Negotiable Offices



Explore #3:
Different Segments,
Different Moves



move on to
next chapter

#1: WORK-LIFE BALANCE

IMPACT ON MOVING CONSIDERATIONS

44%

Rank air quality, available daylight, or noise reduction as the most important priority when moving to a new dwelling.

1st of 13

Available daylight, ranking

4th of 13

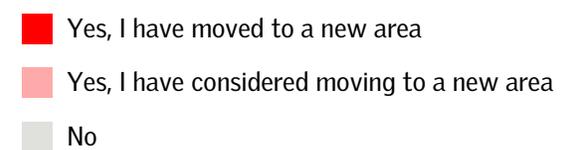
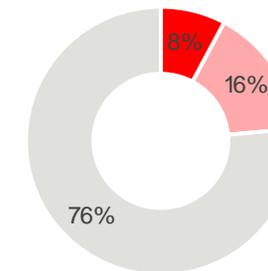
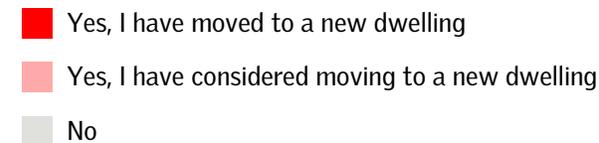
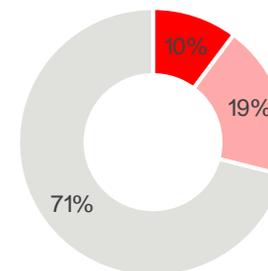
Indoor climate, ranking

11th of 13

Floor plan, ranking

13th of 13

Decorations, ranking



back to
Content Overview

Explore #1:
Work-Life Balance



Explore #2:
Non-Negotiable Offices

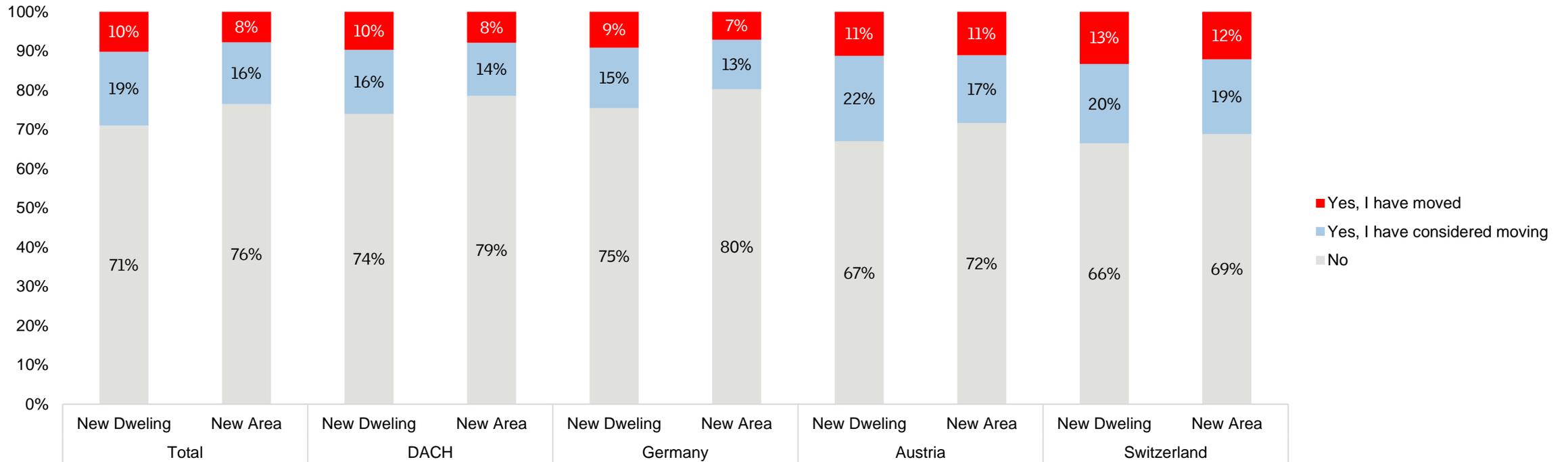


Explore #3:
Different Segments,
Different Moves



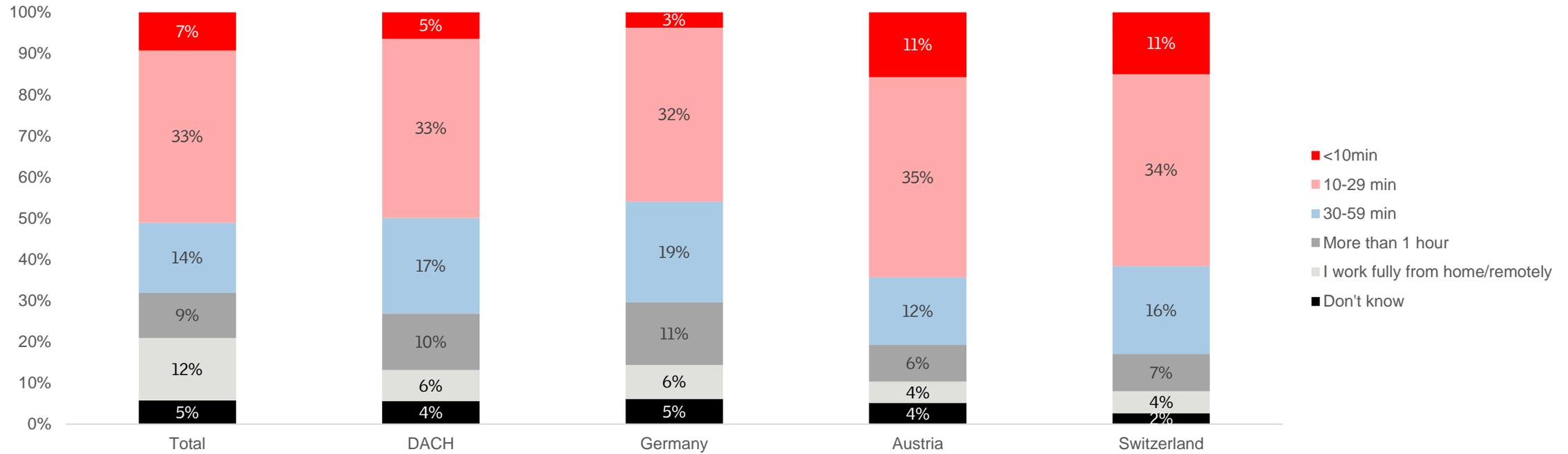
move on to
next chapter

MOVING TO A NEW DWELLING OR NEW AREA



	Total	DACH	Germany	Austria	Switzerland
Total, n=	15504	2205	1000	1000	1000

COMMUTE TIME FROM NEW AREA



	Total	DACH	Germany	Austria	Switzerland
Total, n=	3652	474	197	284	312



SELF-CLAIMED IMPORTANCE: NEW DWELLING

	Total n: 4495	DACH n: 575	Germany n: 246	Austria n: 330	Switzerland n: 336
Available daylight	1	1	1	1	1
Available artificial light	2	4	4	4	3
Light quality	3	6	7	5	4
Indoor climate	4	2	2	2	2
Indoor air quality	5	3	3	3	5
Noise level from outside	6	8	8	8	6
A dedicated home office or similar workspace	7	7	6	10	7
View to the outside/View from your desk	8	5	5	6	8
Noise level from inside	9	9	9	9	9
The overall size of the dwelling	10	10	10	7	10
The floor plan/layout of the dwelling	11	11	11	11	11
Not having to share the dwelling with other residents than my own family	12	12	12	12	12
Decoration	13	13	13	13	13

SELF-CLAIMED IMPORTANCE: NEW AREA

	Total n: 3652	DACH n: 474	Germany n: 197	Austria n: 284	Switzerland n: 312
Air freshness	1	1	1	1	1
Available daylight	2	2	2	2	2
Noise level	3	3	4	3	3
Becoming part of a large city/community	4	5	5	7	5
Having a vibrant/lively community	5	4	3	4	4
Becoming part of a smaller city/community	6	6	6	5	6
Enabling a more sustainable/environmentally considerate lifestyle	7	7	7	6	7
Short distance to shopping and services	8	8	9	8	8
Short distance to nature	9	9	8	10	10
Short distance to city life	10	10	12	13	9
Saving money on transportation	11	11	10	11	13
Short distance to family and friends	12	13	13	9	11
Short distance to work/Saving commuting time	13	12	11	12	12

#2: NON-NEGOTIABLE OFFICES

IMPACT ON MOVING CONSIDERATIONS

A dedicated home office is ranked 5th in terms of importance when moving to a new dwelling

In terms of being non-negotiable, a dedicated home office is viewed as more important than guest rooms and children's rooms, among others.



When looking specifically at those working from home 5 days per week, or those that experience high levels of dissatisfaction with working from home, the dedicated home office climbs further up the list to become more important than e.g. dining rooms and on par with a garage.



back to
Content Overview



Explore #1:
Work-Life Balance



Explore #2:
Non-Negotiable Offices

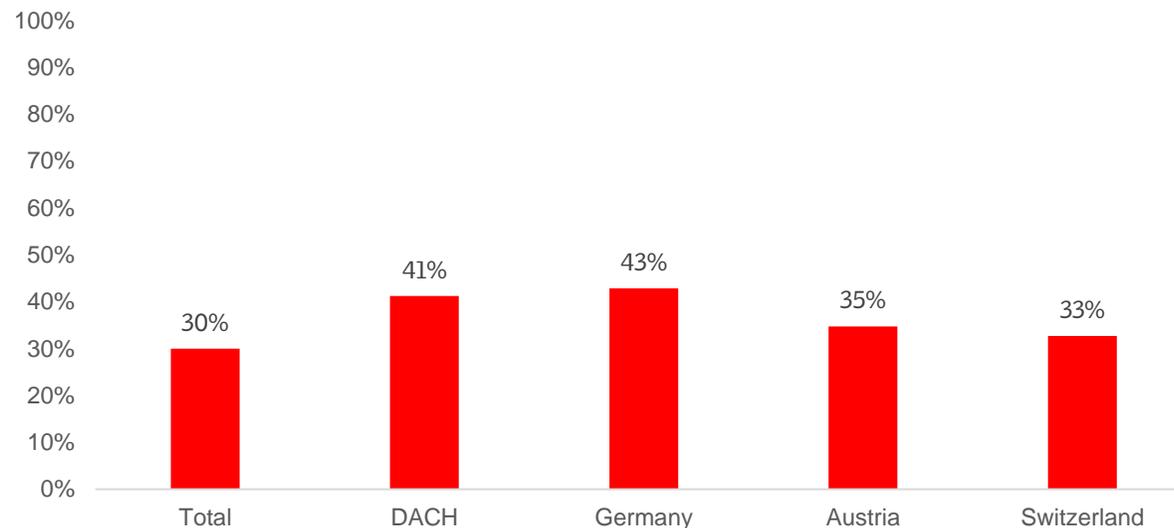
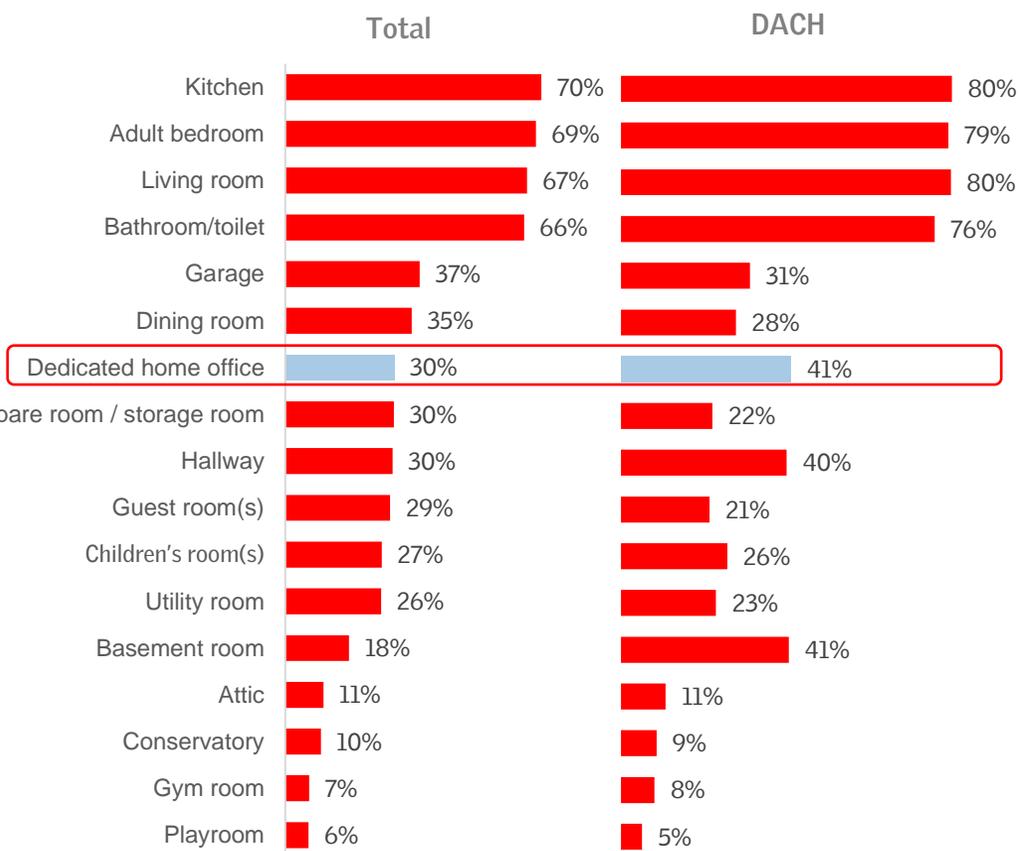


Explore #3:
Different Segments, Different Moves



move on to
next chapter

HOME OFFICE – NON-NEGOTIABLE



	Total	DACH	Germany	Austria	Switzerland
Total, n=	15504	2205	1000	1000	1000

#3: DIFFERENT SEGMENTS, DIFFERENT MOVES

IMPACT ON MOVING CONSIDERATIONS

34% of the Family and Indoor Climate Focus and the Mature Stagers segments view a dedicated home office as indispensable, whereas this is only true for 25% of the DIY Price Conscious segment.

Non-negotiable rooms are dictated to a great extent by life stages. For instance, Mature Stagers and Settled Empty Nesters add more emphasis to core rooms like bedrooms and kitchen, while attics, conservatories, and basements are more important to the Family and Indoor Climate Focus segment.



Top three rankings are given much more often to available daylight, light quality, indoor climate, noise levels, and a dedicated home office by the Settled Empty Nesters, DIY Price Conscious, and Young Modern than other segments.

Conversely, the Family and Indoor Climate Focus, Status Seekers, and Mature Stagers emphasize other elements more clearly such as dwelling size, floor plan, and becoming part of the community.

If there's no interesting thing about them in the region not to add it (as well the sample allows it)



back to
Content Overview



Explore #1:
Work-Life Balance



Explore #2:
Non-Negotiable Offices



Explore #3:
Different Segments, Different
Moves



move on to
next chapter



SELF-CLAIMED IMPORTANCE: NEW DWELLING

Global	Total n: 4495	Family and indoor climate focus n: 1362	Status seekers n: 962	Mature stagers n: 344	Settled empty nesters n: 212	DIY price conscious n: 865	Young modern hedonists n: 629
Available daylight	1	1	1	3	3	1	3
Available artificial light	2	4	2	9	2	2	2
Light quality	3	2	3	8	6	3	1
Indoor climate	4	3	6	10	5	4	4
Indoor air quality	5	5	4	6	7	5	5
Noise level from outside	6	6	7	4	4	6	6
A dedicated home office or similar workspace	7	7	8	1	1	7	8
View to the outside/View from your desk	8	8	5	11	11	8	9
Noise level from inside	9	9	9	5	8	9	7
The overall size of the dwelling	10	10	10	2	12	10	10
The floor plan/layout of the dwelling	11	11	11	7	10	11	11
Not having to share the dwelling with other residents than my own family	12	12	13	12	9	12	12
Decoration	13	13	12	13	13	13	13



SELF-CLAIMED IMPORTANCE: NEW AREA

Global	Total n: 3652	Family and indoor climate focus n: 1126	Status seekers n: 806	Mature stagers n: 235	Settled empty nesters n: 147	DIY price conscious n: 801	Young modern hedonists n: 536
Air freshness	1	1	1	8	3	1	1
Available daylight	2	2	2	5	2	2	5
Noise level	3	3	3	11	1	3	4
Becoming part of a large city/community	4	4	5	7	5	6	6
Having a vibrant/lively community	5	6	6	9	6	4	2
Becoming part of a smaller city/community	6	5	4	12	4	5	7
Enabling a more sustainable/environmentally considerate lifestyle	7	7	7	10	7	7	9
Short distance to shopping and services	8	8	8	2	9	8	3
Short distance to nature	9	9	9	3	8	9	10
Short distance to city life	10	10	10	6	12	11	13
Saving money on transportation	11	13	11	1	10	12	8
Short distance to family and friends	12	11	12	13	11	10	11
Short distance to work/Saving commuting time	13	12	13	4	13	13	12

Bringing light to life™

CONTACT INFO

FIND US HERE

 twitter.com/VELUX

 facebook.com/VELUX

 youtube.com/user/VELUX

 linkedin.com/company/VELUX

 pinterest.com/VELUXGroup/