

VES WFH/Remote Working Survey - Executive Summary

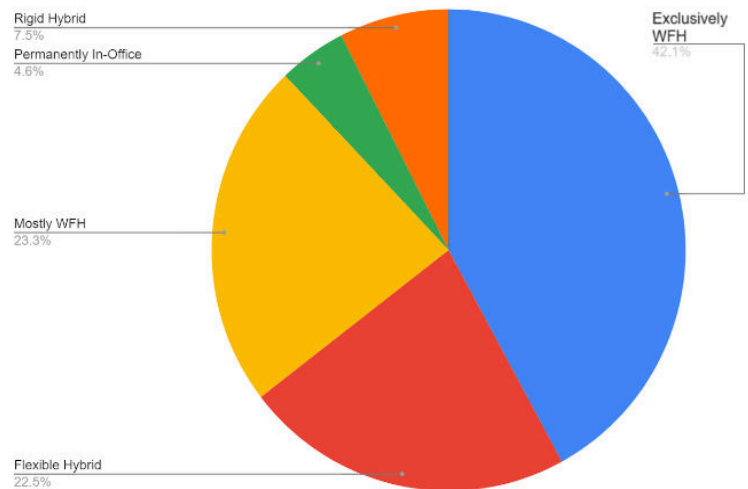
In 2021, during the Coronavirus pandemic, the entertainment industry kept productions rolling safely by quickly adapting to allow work to continue from private homes. The Visual Effects Society created the Working From Home Committee to study our members' working situations and preferences. The Committee (working remotely, all over the globe!) released a survey which received over 1,100 responses between May and August 2023. In the midst of tabulating all of the data, the industry was hit with the dual writers and actors strikes, resulting in mass layoffs. The data presented in this report should be viewed in that context - preferences may have changed with peoples' changing circumstances. With the strikes ended and the industry ramping back up, we feel that the survey generates valuable information going forward, useful to both artists and managers alike. The key takeaways from the data are presented here in the spirit of keeping this conversation moving forward so that we might all benefit from the past few years of forging innovative working methodologies that bring the best artists from around the world together to put the most exciting work on the screen. The full data is available in the complete report (on the VES website), for those who want to dive further into the details. Note that in most cases, when we say 'WFH' this could mean somebody is working from their residence, which is close to their 'normal' place of work/office, or they could be working truly remotely, many miles from the company's base of operations.

How Have People Been Working?

For the people surveyed, at the time that they responded, we discovered that the biggest group had been exclusively working from home (both fully remote and within reach of their office), and the next largest group were mostly WFH, only going into the office very occasionally.

Some companies have been establishing more of a hybrid approach to work - some of the days of the week people work from home, and some days every week they are in the office. This is split between those who are 'Flexible Hybrid' (22.5%) and those who are 'Rigid Hybrid' (7.5%).

The smallest group are those who have been permanently working in-office: 4.6% of respondents.



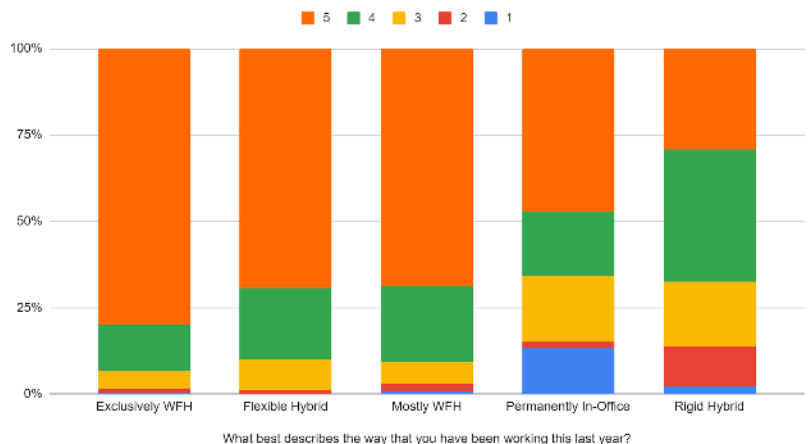
Satisfaction Levels

We cross-correlated the answers to 2 key questions:

"What best describes the way that you have been working this last year?" and "How happy are you with this way that you have been working?"

The most satisfied group are undoubtedly those who are exclusively working from home

Satisfaction Level by Working Status



(average satisfaction level 4.71 out of 5), although satisfaction levels are also very high for those who can work Flexible Hybrid (4.58), or who only occasionally go to the office (4.56). The group that goes into the office with a fixed schedule - 'rigid hybrid' - are, relatively, the least satisfied (3.80). That said, those who are permanently in-office achieved a slightly higher average satisfaction (3.85) than the rigid hybrid group, but also have the highest number of people that really don't seem to like that arrangement, with 13% of that group giving the lowest satisfaction score possible (the blue section of the above chart).

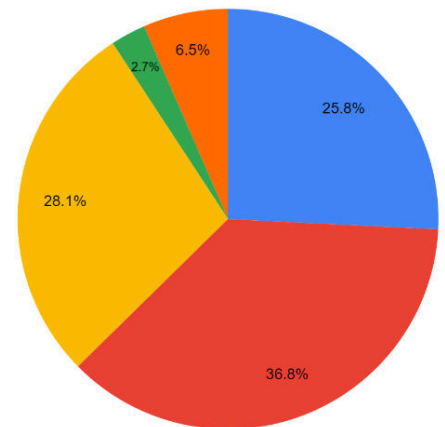
Ideal Working Style

"What would be your preferred way of working in a perfect world?"

The overall preference shows that 97.3% of respondents want to work outside the office, at least some of the time.

The top individual choice is the 'Flexible Hybrid' approach - 36.8% of people opt for this in an "ideal world" situation - followed by 'Mostly WFH', i.e. only very occasional office visits. Just 2.7% think that being Permanently In-Office is the best choice.

● Exclusively WFH
● Flexible Hybrid
● Mostly WFH - rare office visits
● Permanently In-Office
● Rigid Hybrid - WFH some days, Fixed Office days



To get a little more granular - out of people who had been working *only* in-office, 52.6% of them indicated that they would rather be working in one of the remote modes, which would suggest that they are likely only working in the office under some management directive, or other limitation like their home is not suited to a remote setup.

Conversely, of those who are *only* working from home, 90% of them are satisfied with this way of working. This still suggests that there are a small number of people who would like to have the option of more office access, and for whatever reason this is not currently being made possible by their employer, or they are living too far away.

Clearly there is no 'ideal' single way of working that will satisfy everybody, but what we can see from this data is that the more flexibility and control people are given, the happier overall they will be.

The difference between WFH, Hybrid and In-Office experiences.

For the following questions, people were asked whether they Agreed, Disagreed, were Neutral, or if the statement was Not Applicable to them. Each of these three sections were completed by people who had been operating in that way (either WFH, Hybrid, or In-Office) for the majority of the time during the preceding year.

WFH: How is WFH working for you?

Have your working arrangements changed since even before the start of the COVID-19 pandemic?

24.5% of people said they had not experienced any change - so just over 75% of people Working From Home have had to adapt how they work in some way.

Has Working From Home overall been a generally positive experience? 92% of people agree that WFH has overall been a positive experience for them.

Are you able to do your job just as productively as you did in pre-pandemic times? 87.5% of respondents say that they are able to do their job just as productively as they did in pre-pandemic times. While this is a very positive result for WFH advocates, it's still worth noting that this means 1 out of every 8 people surveyed feels they are not as productive as before.

Do you feel as well connected to the rest of your team as you did before this way of working started? 42.8% of people say that they feel as well connected to the rest of their team as before.

Do you feel that this is the new normal, and are hopeful that you can continue to work in this fashion into the future? 89.6% of people agree with the statement, and only 3% fully disagree.

Do you find this way of working effective for communication and collaboration? Slightly mixed response here, 65% of people agree that it is effective, but 9% of people say that it is not. A quarter of people are on the fence.

Hybrid: How is the Hybrid approach working for you?

Has additional time working from home overall been a generally positive experience? 83.6% of people agree that the working from home component of hybrid working has overall been a positive experience for them.

Has time working from the office overall been a generally positive experience? A lower number, 63.7% of people, agree that the office working component of hybrid working has overall been a positive experience for them. Of the remainder, 26% are 'neutral' about it, and 10% disagree that it's been positive.

Are you able to do your job just as productively as you did in pre-pandemic times? 80.2% of respondents say that they are able to do their job just as productively as they did in pre-pandemic times. While this is a very positive result for Hybrid working advocates, it's still worth noting that this means 1 out of every 5 people feels they are not as productive as before.

Do you feel as well connected to the rest of your team as you did before this way of working started? Only 39.6% of people say that they feel as well connected to the rest of their team.

Do you feel that this is the new normal, and are hopeful that you can continue to work in this fashion into the future? This had a resounding positive response - 81.9% of people agree with the statement, and only 4% fully disagree.

In-Office: How is an office-based approach working for you?

Has time spent working from the office overall been a generally positive experience? 75% of people agree that working from an office has overall been a positive experience for them.

Would you rather be able to work in one of the other modes, WFH or Hybrid? 15.8% of them are happy working from the office. 52.6% of respondents say that they would rather be working in another way.

Are you able to do your job just as productively as you did in pre-pandemic times? 60.7% of respondents say that they are able to do their job just as productively as they did in pre-pandemic times, and 23% say that they disagree with this statement, with the rest being neutral.

Do you feel as well connected to the rest of your team as you did before this way of working started? Only 33.9% of people say that they feel as well connected to the rest of their team.

Do you feel that this is the new normal, and are hopeful that you can continue to work in this fashion into the future? This had a far more mixed response compared to remote workers - 35.1% of people agree with the statement, 26.3% fully disagree, and 38.6% are neutral.

Do you find this way of working effective, even with a significant portion of your team not being there? Another mixed response here; 32.8% of people agree that it is effective, but 24.1% of people say that it is not, with 43% of people on the fence.

Free text responses

We included one free text field, for people to share any additional clarifications or thoughts. Of course these takes are anecdotal rather than data points, but they do a great job of summarizing some peoples' impressions:

- Working from home requires self discipline and the ability to structure oneself to still be productive and be a valued member of any team. So for this career artist of over two decades working at various studios and many high profile productions, working from home can honestly be said to be the only positive thing to come out of a horrible situation called a global pandemic.
- It is in an employer's best interest to offer employees the options of how they want to work, whether remotely, in-studio, or hybrid. Many have now worked on successful productions all created while working from home. The proof is now there that it can be done and still be profitable for all involved.
- From the clients side, there's really not that much change, we've been remotely managing vendors around the world for years. Now we just have our internal staff working hybrid too. I still like to get together in person with the team for dailies/vfx review, because I find this more productive and collaborative. But all other work seems to be just as good in the WFH. On the vendor side, I do miss the ability to sit next to an artist and work out problems together. Like doing color correction or adjusting layouts of shots. Doing that over zoom just isn't as easy. But saving 2 hours of commuting time per day more than makes up for that.
- Work from home has been a benefit not only to my productivity, but also my mental and physical health. I have saved a ton of money by not commuting, purchasing clothes, eating out, and I even focus better at home.
- I just miss pub nights / lunches with my colleagues. The social interaction when positive definitely lends itself to higher morale and on occasion better creative outcomes but definitely not enough to stop WFH.
- I feel preferring to work WFH or Hybrid is determined by how management organizes the team. Some shows run perfectly while others contain constant miscommunications.
- The pandemic proved that as an industry of content creators we could have been working from home all along! So many years sitting in traffic not being able to be home on time for dinners, long overtime hours and then having to commute home, not making it to family events. All of that instantly gone when shifting to working from home.
- Team meetings are more efficient. Communicating with others in Zoom requires individuals to be more personable, friendly, less ego driven, and more appreciation and respect is shown..
- I think Hybrid work is best for the artists. It's very important to have family time, and some flexibility in your schedule to manage your life. Quality of life is much better and hopefully it will stay that way.
- I feel the studios on all fronts are going to push for more in office workers regardless of these surveys. Majority of my staff and colleagues would rather be working from home in a more affordable city. The price on commercial real estate is going to force owners of bigger studios to urge employees back into an office environment.