

# Americans are embracing flexible work—and they want more of it

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The American Opportunity Survey illuminates how many people are offered the option to work from home, who works flexibly, and how they feel about it.

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**W**hen the **COVID-19 pandemic** shuttered workplaces nationwide, society was plunged into an unplanned experiment in work from home. Nearly two-and-a-half years on, organizations worldwide have created new working norms that acknowledge that flexible work is no longer a temporary pandemic response but an enduring feature of the modern working world.

The third edition of McKinsey's American Opportunity Survey provides us with data on how flexible work fits into the lives of a representative cross section of workers in the United States. McKinsey worked alongside the market-research firm Ipsos to query 25,000 Americans in spring 2022 (see sidebar, "About the survey").

The most striking figure to emerge from this research is 58 percent. That's the number of Americans who reported having the opportunity to work from home at least one day a week.<sup>[1]</sup> Thirty-five percent of respondents report having the option to work from home five days a week. What makes these numbers particularly notable is that respondents work in all kinds of jobs, in every part of the country and

sector of the economy, including traditionally labeled “blue collar” jobs that might be expected to demand on-site labor as well as “white collar” professions.

Another of the survey’s revelations: when people have the chance to work flexibly, 87 percent of them take it. This dynamic is widespread across demographics, occupations, and geographies. The flexible working world was born of a frenzied reaction to a sudden crisis but has remained as a desirable job feature for millions. This represents a tectonic shift in where, when, and how Americans want to work and are working.

The following six charts examine the following:

- the number of people offered flexible working arrangements either part- or full-time
- how many days a week employed people are offered and do work from home
- the gender, age, ethnicity, education level, and income of people working or desiring to work flexibly
- which occupations have the greatest number of remote workers and how many days a week they work remotely
- how highly employees rank flexible working arrangements as a reason to seek a new job
- impediments to working effectively for people who work remotely all the time, part of the time, or not at all

Flexible work’s implications for employees and employers—as well as for real estate, transit, and technology, to name a few sectors—are vast and nuanced and demand contemplation.

## **1. Thirty-five percent of job holders can work from home full-time, and 23 percent can do so part-time**

A remarkable 58 percent of employed respondents—which, extrapolated from the representative sample, is equivalent to 92 million people from a cross section of jobs and employment types—report having the option to work from home for all or part of the week. After more than two years of observing remote work and predicting that flexible working would endure after the acute phases of the COVID-19 pandemic, we view these data as a confirmation that there has been a major shift in the working world and in society itself.

We did not ask about flexible work in our American Opportunity Survey in past years, but an array of other studies indicate that flexible working has grown by anywhere from a third to tenfold since 2019.<sup>[1]</sup>

Thirty-five percent of respondents say they can work from home full-time. Another 23 percent can work from home from one to four days a week. A mere 13 percent of employed respondents say they could work remotely at least some of the time but opt not to.

Forty-one percent of employed respondents don't have the choice. This may be because not all work can be done remotely or because employers simply demand on-site work. Given workers' desire for flexibility, employers may have to explore ways to offer the flexibility employees want to compete for talent effectively.

**Of job holders in the United States, 58 percent—the equivalent of 92 million people—say they can work remotely at least part of the time.**

**Availability of remote-work options, % of employed respondents (n = 13,896)<sup>1</sup>**



Offered remote work  
on a full-time basis

**35**

Offered remote work  
part-time or on occasion

**23**

Not offered remote-  
work opportunities<sup>1</sup>

**42**

Number of  
workers,  
extrapolated<sup>2</sup>

55 million

36 million

66 million

Note: Figures may not sum, because of rounding.

<sup>1</sup>Includes respondents who answered "I don't know" (1%).

<sup>2</sup>Of 158,105,000 employed people; US Bureau of Labor Statistics, Apr 2022.

Source: McKinsey American Opportunity Survey Spring 2022

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## 2. When offered, almost everyone takes the opportunity to work flexibly

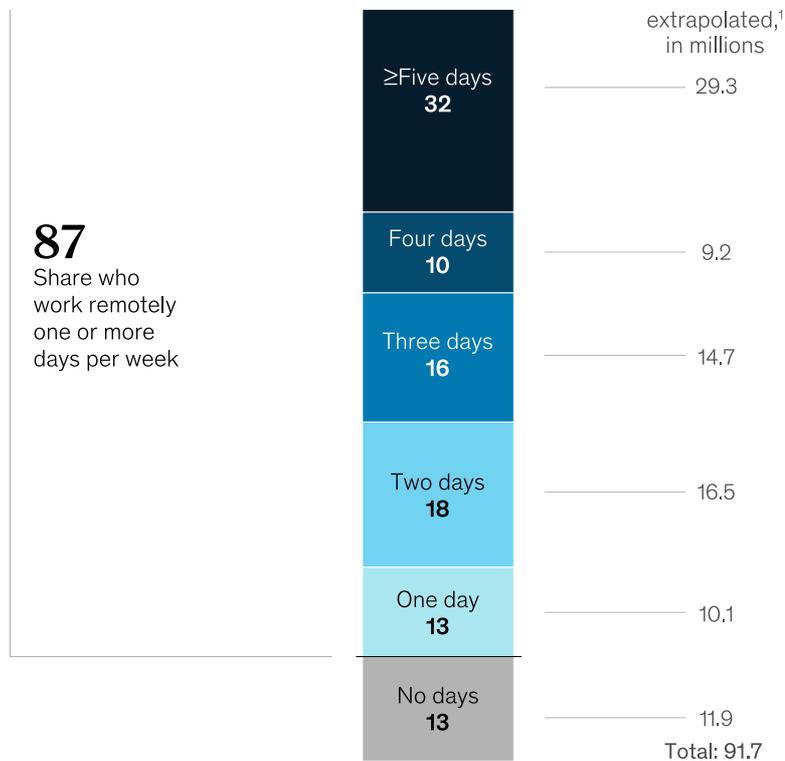
The results of the survey showed that not only is flexible work popular, with 80 million Americans engaging in it (when the survey results are extrapolated to the wider population), but many want to work remotely for much of the week when given the choice.

Eighty-seven percent of workers offered at least some remote work embrace the opportunity and spend an average of three days a week working from home. People offered full-time flexible work spent a bit more time working remotely, on average, at 3.3 days a week. Interestingly, 12 percent of respondents whose employers only offer part-time or occasional remote work say that even they worked from home for five days a week. This contradiction appears indicative of a tension between how much flexibility employers offer and what employees demand.

**Among employed respondents given the option to work remotely, 87 percent take employers up on that offer.**

**Days worked remotely per week**, % of employed respondents with remote-work options (n = 13,896)

Number of  
workers,



Note: Figures may not sum to 100%, because of rounding.  
<sup>1</sup>Includes 158,105,000 employed people; US Bureau of Labor Statistics, Apr 2022; 35% of respondents reported having the option to work fully remote, and 23% reported having the option to work from home on occasion/part-time.  
 Source: McKinsey American Opportunity Survey Spring 2022



### 3. Most employees want flexibility, but the averages hide the critical differences

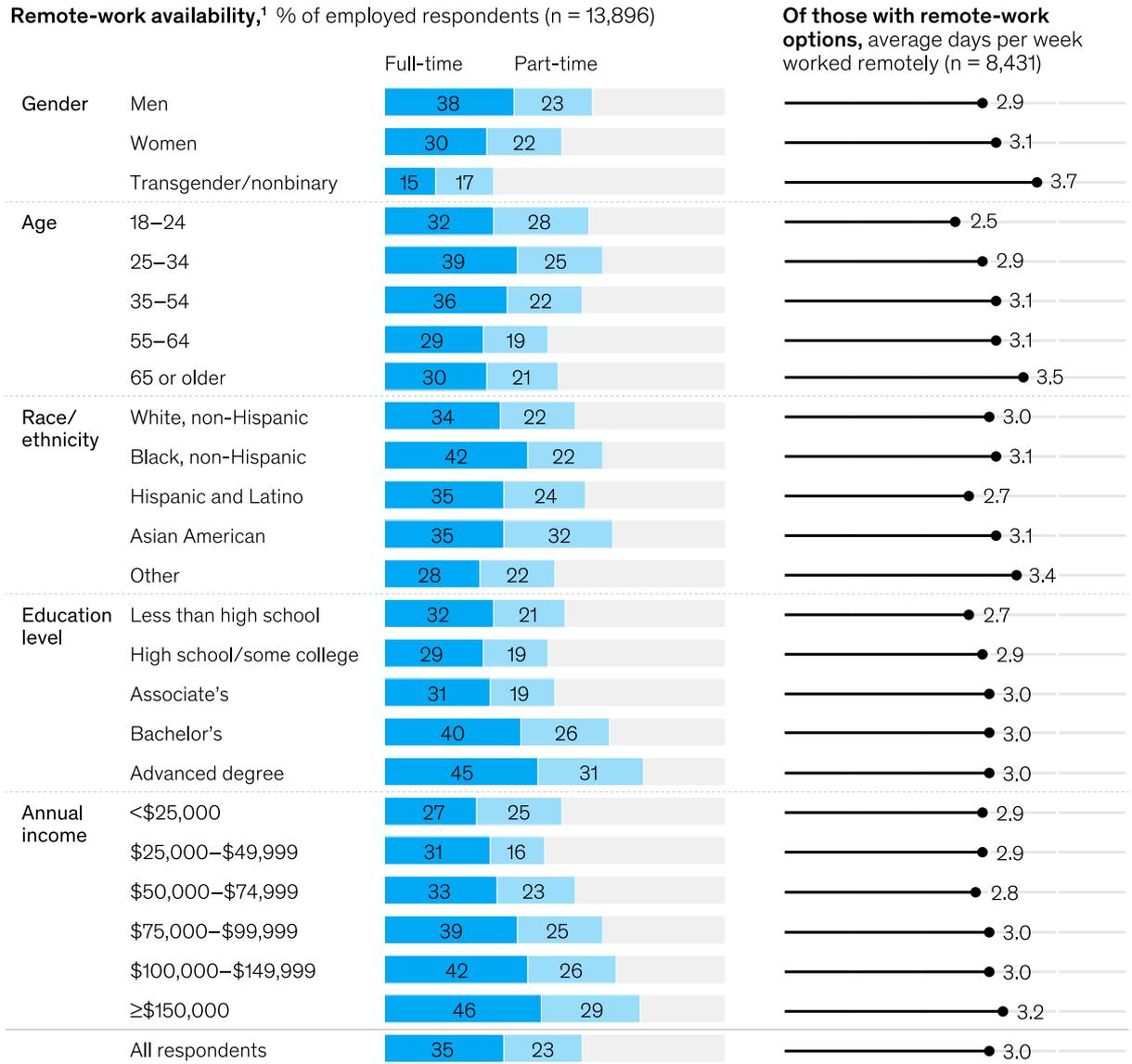
There’s remarkable consistency among people of different genders, ethnicities, ages, and educational and income levels: the vast majority of those who can work from home do so. In fact, they just want more flexibility: although 58 percent of employed respondents say they can work from home at least part of the time, 65 percent of employed respondents say they would be willing to do so all the time.

However, the opportunity is not uniform: there was a large difference in the number of employed men who say they were offered remote-working opportunities (61 percent) and women (52 percent). At every income level, younger workers were more likely than older workers to report having work-from-home opportunities.

People who could but don’t work flexibly tend to be older (19 percent of 55- to 64-year-olds offered remote work didn’t take it, compared with 12 to 13 percent of younger workers) or have lower incomes (17 percent of those earning \$25,000 to \$74,999 per year who were offered remote work didn’t take it, compared with 10 percent of those earning over \$75,000 a year). While some workers may choose to work on-site

earning over \$75,000 a year). While some workers may choose to work on-site because they prefer the environment, others may feel compelled to because their home environments are not suitable, because they lack the skills and tools to work remotely productively, or because they believe there is an advantage to being on-site. Employers should be aware that different groups perceive and experience remote work differently and consider how flexible working fits with their diversity, equity, and inclusion strategies.

**People in the United States who are younger, more educated, or have higher incomes tend to have more options to work remotely.**



<sup>1</sup>Only asked to employed respondents: "Does your employer currently offer you work-from-home opportunities? Or are you able to work from home as a self-employed individual?"  
Source: McKinsey American Opportunity Survey Spring 2022



## 4. Most industries support some flexibility, but digital innovators demand it

The opportunity to work flexibly differs by industry and role within industries and has implications for companies competing for talent. For example, the vast majority of employed people in computer and mathematical occupations report having remote-work options, and 77 percent report being willing to work fully remotely. Because of rapid digital transformations across industries, even those with lower overall work-from-home patterns may find that the technologists they employ demand it.

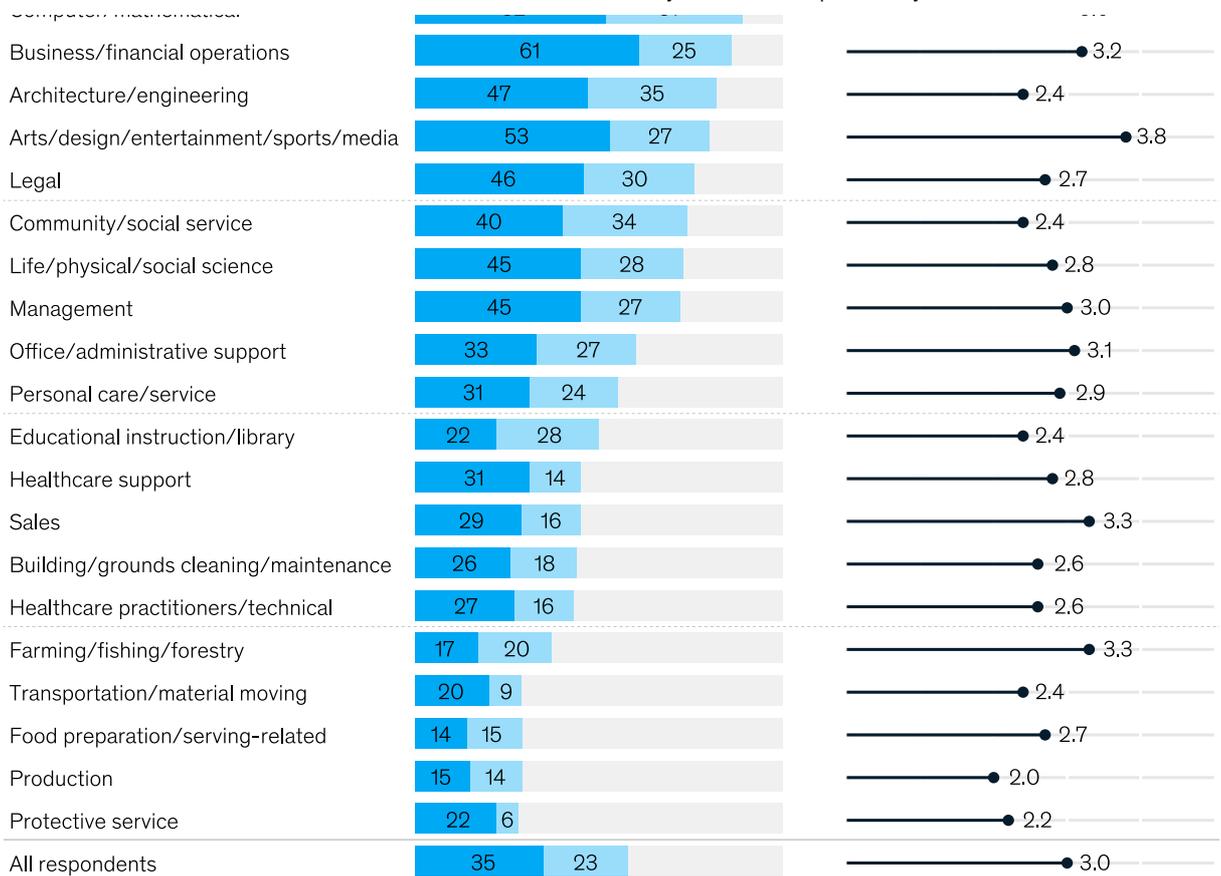
A surprisingly broad array of professions offer remote-work arrangements. Half of respondents working in educational instruction and library occupations and 45 percent of healthcare practitioners and workers in technical occupations say they do some remote work, perhaps reflecting the rise of online education and telemedicine. Even food preparation and transportation professionals said they do some work from home.

### Flexible work varies by occupation and role—and is a factor to consider in the ‘war for talent.’

Remote-work availability,<sup>1</sup> % of employed respondents (n = 13,896)

Of those with remote-work options, average days per week worked remotely (n = 8,431)





<sup>1</sup>Only asked to employed respondents: "Does your employer currently offer you work-from-home opportunities? Or are you able to work from home as a self-employed individual?" Responses for construction and installation, maintenance, and repair occupations not shown, as reported availability from respondents was significantly higher than the technical feasibility estimated for those occupations. Source: McKinsey American Opportunity Survey Spring 2022



## 5. Job seekers highly value having autonomy over where and when they work

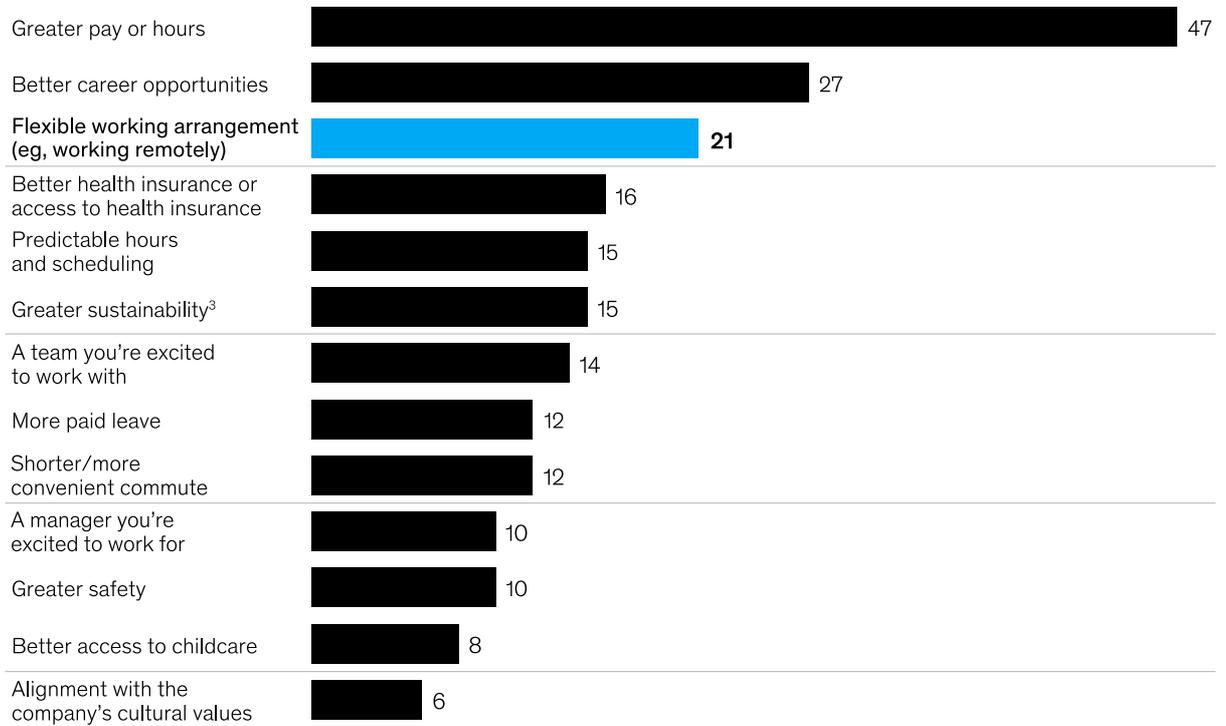
The survey asked people if they had hunted for a job recently or were planning to hunt for one. Unsurprisingly, the most common rationale for a job hunt was a desire for greater pay or more hours, followed by a search for better career opportunities. The third-most-popular reason was looking for a flexible working arrangement.

Prior McKinsey research has shown that for those that left the workforce during the early phases of the COVID-19 pandemic, workplace flexibility was a top reason that they accepted new jobs. Employers should be aware that when a candidate is deciding

between job offers with similar compensation, the opportunity to work flexibly can become the deciding factor.

**A flexible working arrangement is a top three motivator for finding a new job.**

**Motivation for seeking a new job,**<sup>1</sup>% of respondents looking for a job (n = 11,958)<sup>2</sup>



<sup>1</sup>Question: Which of the following are reasons that have motivated you or would motivate you to seek a new job (select as many as 3)? The responses "Other" and "Nothing" are not shown.  
<sup>2</sup>Only asked of respondents who reported having looked for a job in the last 12 months, are currently looking for a job, or plan to look for a job in the next 12 months.  
<sup>3</sup>And ability to maintain mental health and well-being.  
 Source: McKinsey American Opportunity Survey Spring 2022



## 6. Employees working flexibly report obstacles to peak performance

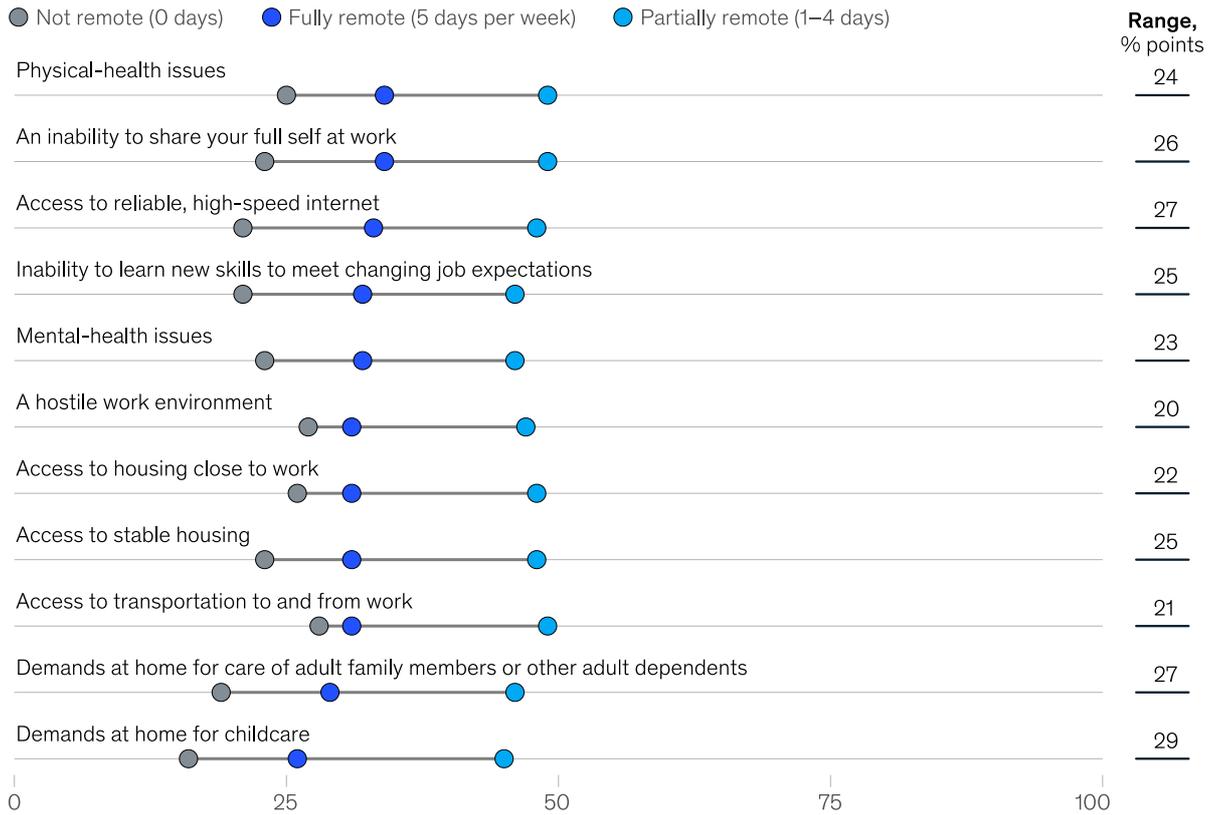
The survey asked respondents to identify what made it hard to perform their jobs effectively. Those working in a flexible model were most likely to report multiple obstacles, followed by those working fully remotely, and then by those working in the office. Our research doesn't illuminate the cause and effect here: it could be that people who face barriers are more likely to spend some time working from home. It could also be that workers who experience both on-site and at-home work are exposed to the challenges of each and the costs of regularly switching contexts.

Some obstacles were reported at much higher rates by specific groups: for example, about 55 percent of 18- to 34-year-olds offered the option to work fully remotely say mental-health issues impacted their ability to perform effectively, though only 17 percent of people aged 55 to 64 said the same. Workers with children at home who were offered full-time remote-work options were far more likely than their peers without children to report that problems with physical health or a hostile work environment had a moderate or major impact on their job.

For many working remotely, flexible arrangements still have their challenges

**For many working remotely, flexible arrangements still have their challenges.**

**Factors that impact ability to effectively perform work,<sup>1</sup> % of respondents (n = 13,896)**



<sup>1</sup>Question: If you think about your job today, or your most recent job, to what extent are/were any of the following impacting your ability to effectively perform your work?; answers from % of employed respondents citing "major impact" or "moderate impact."  
Source: McKinsey American Opportunity Survey Spring 2022



The results of the American Opportunity Survey reflect sweeping changes in the US workforce, including the equivalent of 92 million workers offered flexible work, 80 million workers engaged in flexible work, and a large number of respondents citing a search for flexible work as a major motivator to find a new job.

Competition for top performers and digital innovators demands that employers understand how much flexibility their talent pool is accustomed to and expects. Employers are wise to invest in technology, adapt policies, and train employees to create workplaces that integrate people working remotely and on-site (without overcompensating by requiring that workers spend too much time in video meetings). The survey results identify obstacles to optimal performance that underscore a need for employers to support workers with issues that interfere with effective work. Companies will want to be thoughtful

about which roles can be done partly or fully remotely—and be open to the idea that there could be more of these than is immediately apparent. Employers can define the right metrics and track them to make sure the new flexible model is working.

At a more macro level, a world in which millions of people no longer routinely commute has meaningful implications for the commercial core in big urban centers and for commercial real estate overall. Likewise, such a world implies a different calculus for where Americans will live and what types of homes they will occupy. As technology emerges that eliminates the residual barriers to more distributed and asynchronous work, it could become possible to move more types of jobs overseas, with potentially significant consequences.

In time, the full impact of flexible working will be revealed. Meanwhile, these data give us early insight into how the working world is evolving.

*For more on the imperative for flexible work and how organizations can respond, please see [McKinsey.com/featured-insights/ Future-of-the-workplace](https://www.mckinsey.com/featured-insights/future-of-the-workplace).*

1. "Internet surveys," Pew Research Center.
2. Many of the survey questions asked respondents about their ability or desire to "work from home." "Work from home" is sometimes called "remote work," while arrangements that allow for both remote and in-office work are often interchangeably labeled "hybrid" or "flexible" arrangements. We prefer the term flexible, which acknowledges that home is only one of the places where work can be accomplished and because it encompasses a variety of arrangements, whereas hybrid implies an even split between office and remote work.
3. Rachel Minkin et al., "How the coronavirus outbreak has—and hasn't—changed the way Americans work," Pew Research Center, December 9, 2020; "Telework during the COVID-19 pandemic: Estimates using the 2021 Business Response Survey," US Bureau of Labor Statistics, Monthly Labor Review, March 2022.

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