

Makridis, Christos

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Measuring the Ins and Outs of Remote Work: New Evidence from the Gallup Workplace Panel

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Christos Makridis

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Poschingerstr. 5, 81679 Munich, Germany
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Measuring the Ins and Outs of Remote Work: New Evidence from the Gallup Workplace Panel

By CHRISTOS A. MAKRIDIS*

Remote and hybrid work have risen from niche arrangements to a defining feature of the post-pandemic labor market. At the pandemic's peak in 2020, more than half of work was performed away from traditional offices (Barrero, Bloom and Davis, 2021, 2023; Brynjolfsson et al., 2025). Even as workplaces reopened, roughly 28% of paid workdays in the United States were still done from home as of mid-2023—four times the pre-2020 rate. Since then, and despite numerous return-to-office mandates, WFH has stabilized at a much higher level than before the pandemic and is expected to persist across the world too (Aksoy et al., 2025; Makridis, 2025c). This has motivated a fast-growing literature on the prevalence, productivity, and implications of flexible work arrangements.

The aggregate economic impacts of remote work remain ambiguous. Despite many randomized control trials on remote work suggesting positive or null productivity effects (Bloom et al., 2015; Choudhury, Foroughi and Larson, 2021; Emanuel and Harrington, 2024; Choudhury et al., 2024; Bloom, Han and Liang, 2024), as well as other observational studies (Makridis, 2025a; Pabilonia and Redmond, 2024), there is little macroeconomic evidence arguably because of the absence of longitudinal data that allows for proper calibration to the micro-data. In particular, there are growing concerns that as work becomes increasingly complex, remote arrangements could lead to coordination challenges, which can stifle productivity and employee engagement (Gibbs, Mengel and Siemroth, 2023; Espinosa et al., 2025), particularly if time allocated to work declines or becomes more fragmented over the week in jobs requiring greater degrees of coordination (Makridis, 2025a,b).

This paper fills that gap by studying flows into and out of on-site, hybrid, and fully remote work using a unique longitudinal worker survey from Gallup between 2019 and 2025, providing new evidence on the worker-level transition structure across work-arrangement states in the United States using the Gallup Workplace Panel—a multi-year panel of workers that tracks individual work arrangements (on-site vs. hybrid vs. fully remote) along with job and demographic information. Using this panel, I observe workers' transitions between different work modes over a horizon of several years. I document the frequencies of these transitions and how they differ across groups—for example, I show that college-educated and high-skill workers are more likely to move into hybrid roles. A central takeaway is that work arrangements exhibit substantial persistence, but hybrid work is comparatively more transitory, with movement in both directions. Importantly, I also distinguish transitions that occur with the same employer from those that involve a job change. This decomposition isolates within-match adjustment from re-sorting across jobs and employers, clarifying the margin through which aggregate work arrangements evolve. A substantial fraction of work-arrangement changes occur within ongoing employment relationships (e.g., an office worker shifting to hybrid work with their current employer), while others occur through labor turnover (e.g., an on-site worker quits and takes a new remote job). This distinction matters for theory: if remote work can adjust within a match, it may be better modeled as an endogenous choice or contract feature, whereas if it mainly changes via job switching, it behaves more like a fixed job attribute that workers sort across.

This paper builds on the canonical search-and-matching model of the labor market (Diamond, 1982; Mortensen and Pissarides, 1994; Pissarides, 2000). However, those frameworks typically treat all jobs as homogeneous aside from productivity. The rise of remote work poses new challenges: it introduces a new dimension of job heterogeneity that workers value, and potentially new kinds of

* Arizona State University, Gallup Inc., University of Nicosia & CESifo, (christos_makridis@gallup.com). I thank Andreas Mueller, as well as Jim Harter, Sabrina Yu, and the team at Gallup. I also thank Erik Brynjolfsson, John Horton, Alex Mas, Adam Ozimek, Daniel Rock, and Hong-Yi Tu-Ye for collaboration on the Remote Life Survey (RLS) that inspired this research.

matching frictions (e.g., geographic frictions are reduced by remote jobs, which could expand the effective matching function). In standard Diamond-Mortensen-Pissarides (DMP) job search models environments, the key calibration targets are the aggregate job-finding and separation rates, together with unemployment and vacancy stocks. These moments are silent about how workers reallocate across different types of jobs—on-site, hybrid, and remote—once matched, and thus about the dynamics of the amenity margin itself, which may increasingly matter in a hybrid labor market. Modern macro-labor models have begun incorporating richer heterogeneity, including in the study of remote work, which functions as an amenity (Mas and Pallais, 2017). For example, Sedláček and Shi (2025) introduce remote versus on-site jobs in a macro model, and Valdés-Bobes and Lukianova (2025) build a structural search model with heterogeneous teleworkability and worker preferences for remote work. Related amenity-based models interpret the post-pandemic surge in vacancies and quits as driven by shocks to the value of job amenities, with work-from-home as a leading example (e.g., Bagga et al., 2025). However, the quantitative calibration in these models has relied on aggregate moments—for instance, overall job turnover rates, unemployment and vacancy series, or the share of remote jobs—alongside cross-sectional wage and amenity differentials. In the absence of micro-data, they have been unable to directly discipline the transition structure between work arrangements.

Moreover, the decomposition of flows into within-employer and between-employer transitions speaks to a key modeling assumption in existing work. If most changes in work arrangement occur across employers, this supports modeling remote work as a discrete job type or amenity that workers sort into via job-to-job transitions (Sedláček and Shi, 2025; Valdés-Bobes and Lukianova, 2025). By contrast, if a substantial share of transitions are within ongoing matches—for example, on-site workers shifting to hybrid or remote with the same employer—then remote work must also be treated as a within-match state variable or contract choice, with its own adjustment technology and bargaining implications. This data can disentangle both margins providing guidance on where a “job-type” modeling approach is sufficient and where a richer multi-state match structure is needed.

I. Data and Measurement

This paper uses the Workplace Panel, a probability-based longitudinal survey conducted by Gallup. It recruits a nationally representative sample of adults aged 18 and above using random sampling methods (address-based and random-digit dialing recruitment), ensuring coverage of the U.S. population. From this panel, Gallup fields specialized workforce surveys to panel members who are employed. The study leverages a series of panel waves focused on work arrangements, spanning from a baseline survey in 2019 through 2025; each year contains four quarters of data except 2019 and 2020. These survey waves coincide with the dramatic changes in remote work during and after the COVID-19 pandemic, allowing me to track employed individuals through this period of upheaval.

There are 38,326 unique individuals and 214,118 person-wave observations, restricted to full time respondents between the age of 25 and 65. On average, each respondent contributes about 5.59 survey rounds (see Figure 1). I apply panel weights to adjust for survey non-response and attrition, so that each wave (and the longitudinal sample) remains representative of the U.S. employed population. Figure 2 documents the trends in work arrangements over time. (In addition, the share of time allocated to remote work is 31% as of Q3:2023—close to the 28% estimate in Barrero, Bloom and Davis (2023) for June 2023.) The weighted mean age is 43.1, 56.9% are male, 69.5% are White, 10.8% Black, and 37.5% report having children. Educational attainment skews upward: 27% have high school or less, 26% have some college, and 46% have a college degree or more.

The Gallup Workplace Panel offers a unique window into long-term individual dynamics of remote work that other data sources cannot provide. First, the data are longitudinal (often spanning two or more years per respondent), whereas the ACS is cross-sectional and the CPS—while linkable into a short rotating panel spanning roughly 16 months (Pablonia and Vernon, 2025)—is primarily designed for repeated cross-sections and is less well suited for studying persistence over multi-year horizons. This feature is crucial for understanding the degree of persistence in work arrangements. Second, in addition to work arrangement, there is a rich set of background information, including:

age, gender, race/ethnicity, educational attainment, children at home, employment status, job tenure, industry, occupation, and geography. Third, panelists are asked about how many hours they usually work remotely, as well as how many total hours they work, allowing me to create a continuous measure of remote work that subsequently is used to construct the three mutually exclusive categories of on-site, hybrid, and fully remote based on usual hours worked per week. The Workplace Panel is a good complement to the Survey of Working Arrangements and Attitudes (SWAA) by Barrero, Bloom and Davis (2021) and the Real-Time Population Survey by Bick, Blandin and Mertens (2023). The panel structure here makes it possible to separate compositional change from within-person adjustment and to study transitions into and out of remote/hybrid work at the individual level.

I use two questions from the Gallup Workplace Panel to measure the intensity of remote work: (a) “In a typical week, approximately how many hours do you spend working remotely or in a location different from your co-workers?”, and (b) “Thinking about your primary job: on average, approximately how many hours do you spend working per week?” That allows me to create the share of time allocated to remote work, which I map into three mutually exclusive categories that define the state space $s_{it} \in \{0, 1, 2\}$. Workers are classified as on-site if the share is less than 20%, hybrid if the share is between 20-80%, and fully remote if the share is over 80%. (The hybrid classification differs slightly from the $s \in [.10, 1)$ used in Pendell (2025) to more closely match the literature.)

II. Main Results

Let $s_{it} \in 0, 1, 2$ denote worker i 's work-arrangement state at survey date t , where $s = 0$ is on-site (remote share ≤ 0.20), $s = 1$ is hybrid ($0.20 < \text{remote share} < 0.80$), and $s = 2$ is remote (remote share ≥ 0.80). Using the Gallup Workplace Panel, I estimate the (row-stochastic) transition matrix \hat{P} , where element $P_{ab} = \Pr(s_{i,t+1} = b \mid s_{it} = a)$ and where rows index the worker's arrangement at t and columns index the arrangement at $t + 1$ (On-site = 0, Hybrid = 1, Remote = 2):

$$(1) \quad \hat{P} = \begin{array}{c} \text{On-site} \\ \text{Hybrid} \\ \text{Remote} \end{array} \begin{array}{ccc} \text{On-site} & \text{Hybrid} & \text{Remote} \\ \left(\begin{array}{ccc} 0.9177 & 0.0515 & 0.0308 \\ 0.1675 & 0.7352 & 0.0973 \\ 0.0577 & 0.0927 & 0.8497 \end{array} \right) \end{array}.$$

The diagonal elements imply substantial persistence in all three modes. Among on-site workers at t , 91.7% remain on-site at $t + 1$, while 5.15% move to hybrid and 3.08% move to fully remote. Among hybrid workers, 73.52% remain hybrid, with meaningful off-diagonal mass: 16.75% transition to on-site and 9.73% transition to fully remote. Among fully remote workers, 84.97% stay remote, while 9.27% move to hybrid and 5.77% return to on-site between adjacent observations. These gross flows suggest that most short-horizon adjustment operates through movement into and out of hybrid arrangements, and that remote work is not an absorbing state. This transition structure provides calibration discipline for models in which workers and firms bargain over (or search across) nonwage job attributes and it motivates distinguishing between (i) within-match adjustment of work arrangements and (ii) re-sorting across jobs that differ in remote-work feasibility.

Compared with the pooled 2019-2025 transition matrix, I compute the 2024-2025 matrix, which contains higher persistence in every work arrangement (on-site 0.944 vs 0.917; hybrid 0.799 vs 0.735; remote 0.885 vs 0.849). This implies less churn, consistent with the stabilization of remote work.

To distinguish within-employer adjustment in work arrangements from between-employer re-sorting, I re-estimate transition probabilities separately for observations that coincide with a job move versus those that do not. The motivation is that if remote-work outcomes are primarily a job attribute tied to feasibility and firm policy, then shifts into (or out of) remote work should occur disproportionately when workers change jobs; if instead remote intensity is frequently renegotiated within match, then sizable transitions should be present even among job stayers. Define a proxy jobchange_{it} that equals one if, between adjacent panel observations, the respondent experiences (i) a large decline in reported

tenure, or (ii) an industry switch. Then, I compute the row-stochastic conditional transition matrices:

$$P_{ab}^{JC=j} = \Pr(s_{i,t+1} = b | s_{it} = a, \text{jobchange}_{it} = j), \quad j \in \{0, 1\}.$$

The estimated matrices are:

$$\hat{P}^{JC=1} = \begin{array}{c} \text{On-site} \\ \text{Hybrid} \\ \text{Remote} \end{array} \begin{array}{ccc} \text{On-site} & \text{Hybrid} & \text{Remote} \\ \left(\begin{array}{ccc} 0.8771 & 0.0726 & 0.0503 \\ 0.2335 & 0.6254 & 0.1411 \\ 0.0951 & 0.1169 & 0.7880 \end{array} \right), & \hat{P}^{JC=0} = \begin{array}{c} \text{On-site} \\ \text{Hybrid} \\ \text{Remote} \end{array} \begin{array}{ccc} \text{On-site} & \text{Hybrid} & \text{Remote} \\ \left(\begin{array}{ccc} 0.9395 & 0.0401 & 0.0203 \\ 0.1337 & 0.7915 & 0.0748 \\ 0.0357 & 0.0785 & 0.8859 \end{array} \right).$$

When a job change occurs, all three arrangements are markedly less persistent: the probability an on-site worker remains on-site is $\Pr(0 \rightarrow 0) = 0.8771$ (vs. 0.9395 among job stayers), the probability a hybrid worker remains hybrid is $\Pr(1 \rightarrow 1) = 0.6254$ (vs. 0.7915), and the probability a remote worker remains remote is $\Pr(2 \rightarrow 2) = 0.7880$ (vs. 0.8859). Job mobility is also associated with substantially larger cross-state flows. Conditional on starting on-site, entry into hybrid is higher when a job change occurs ($\Pr(0 \rightarrow 1) = 0.0726$ vs. 0.0401), and entry into fully remote is more than twice as large ($\Pr(0 \rightarrow 2) = 0.0503$ vs. 0.0203). Conditional on starting remote, exits from remote are much more common when job change is flagged: $\Pr(2 \rightarrow 0) = 0.0951$ and $\Pr(2 \rightarrow 1) = 0.1169$, compared with $\Pr(2 \rightarrow 0) = 0.0357$ and $\Pr(2 \rightarrow 1) = 0.0785$ among job stayers. Hybrid workers also exhibit greater movement in both directions when changing jobs, including a higher probability of switching to remote ($\Pr(1 \rightarrow 2) = 0.1411$ vs. 0.0748) and to on-site ($\Pr(1 \rightarrow 0) = 0.2335$ vs. 0.1337).

The split matrices motivate treating remote-work dynamics as the combination of (i) re-sorting across jobs with different remote feasibility and (ii) within-match adjustment of work arrangements. The larger off-diagonal mass under $\text{jobchange} = 1$ indicates that a substantial share of aggregate adjustment operates through job mobility, although this may understate mobility-related re-sorting.

To complement the transition-matrix evidence, I next estimate reduced-form predictors of switching out of the on-site state. The goal is descriptive: to quantify which observable characteristics are associated with movements from on-site work into hybrid or fully remote arrangements, and to separate these correlates from common time shocks. This exercise helps interpret the gross flows in the Markov transition matrix and provides discipline for models in which the remote-work amenity reflects both worker heterogeneity (e.g., age and family constraints) and aggregate shifts in feasibility and employer policy. Let $s_{it} \in \{0, 1, 2\}$ denote the work arrangement of individual i at wave t , where 0 denotes on-site, 1 hybrid, and 2 fully remote. I restrict the estimation sample to observations with $s_{it} = 0$ and an observed subsequent wave (i.e., $s_{i,t+1}$ is observed). I then define indicators for switching from on-site into fully remote and into hybrid between consecutive observed panel waves.

A key objective is to capture persistence (or “hysteresis”) in work arrangements, so I regress indicators for whether the individual switched to fully remote or to hybrid on whether they were remote or hybrid in the previous wave, and a vector of covariates and year fixed effects. Table 1 documents three main patterns in the determinants of switching work arrangements. First, the results show strong evidence of state dependence in work arrangements. Conditional on being on-site at time t , prior exposure to flexible work is a powerful predictor of subsequent switching. In the remote-switching models, having been fully remote in the prior wave is associated with a substantially higher likelihood of switching from on-site into fully remote at the next wave (marginal effects ≈ 0.042 , s.e. ≈ 0.004), while having been hybrid in the prior wave also predicts switching into fully remote, though more modestly (marginal effects ≈ 0.013 , s.e. ≈ 0.003). In the hybrid-switching models, persistence is even more pronounced: previously hybrid workers are far more likely to switch from on-site into hybrid (marginal effects ≈ 0.083 – 0.084 , s.e. ≈ 0.003), and previously remote workers are also more likely to move into hybrid (marginal effects ≈ 0.042 – 0.043 , s.e. ≈ 0.005). These magnitudes imply economically meaningful differences in transition probabilities—for example, relative to prior on-site workers, prior hybrid status raises the probability of switching into hybrid by roughly 8 percentage points—consistent with important “return-to-flexibility” dynamics rather than one-off switching.

Second, switching is concentrated around the pandemic onset and early post-onset period. Relative

to the omitted year, 2020 is associated with a very large increase in switching, especially into fully remote (marginal effects ≈ 0.068), and 2021 remains positive and statistically significant for both destinations (remote: ≈ 0.007 – 0.008 ; hybrid: ≈ 0.009 – 0.012). By contrast, the 2022–2024 effects are small and generally not statistically distinguishable from zero, suggesting that most of the re-sorting into remote and hybrid occurred early, with subsequent years reflecting a more stable regime.

Third, demographic and industry features have intuitive interpretations. Men and older workers are less likely to switch out of on-site work into either remote or hybrid. Educational attainment matters more for switching into hybrid than for switching into fully remote: both “Some college” and “College degree or more” are positively associated with hybrid switching (marginal effects around 0.018 and 0.040, respectively), while education effects in the remote-switching models are comparatively small (near zero to about 0.006). Industry-group fixed effects modestly reallocate differences across sectors—for example, business/finance/tech/professional services is more associated with switching into hybrid (marginal effect ≈ 0.010), while health care is associated with a lower propensity to switch into hybrid (marginal effect ≈ -0.009)—but the core state-dependence estimates on prior remote and hybrid status change little when industry controls are included, reinforcing the interpretation that persistence is not driven solely by broad sector composition.

III. Conclusion

Remote and hybrid work are now persistent features of the U.S. labor market, yet the empirical literature has largely emphasized cross-sectional prevalence and aggregate trends. This paper contributes new evidence on the micro-dynamics of work arrangements by leveraging the Gallup Workplace Panel (2019–2025) to measure gross flows across on-site, hybrid, and fully remote states.

These measurement objects offer practical calibration targets for amenity-based search-and-matching models of the labor market. Matching both the stocks of work arrangements and the flows between them helps distinguish shocks to amenity valuations from changes in feasibility, switching costs, or match productivity, and can improve quantitative predictions for vacancies, quits, and reallocation in environments where remote work relaxes geographic constraints. More broadly, the transition matrices documented here provide a foundation for future work on how remote work interacts with worker mobility, career progression, and firm organization, and they motivate new theory that treats work arrangements as an amenity-relevant state variable evolving both within and across jobs.

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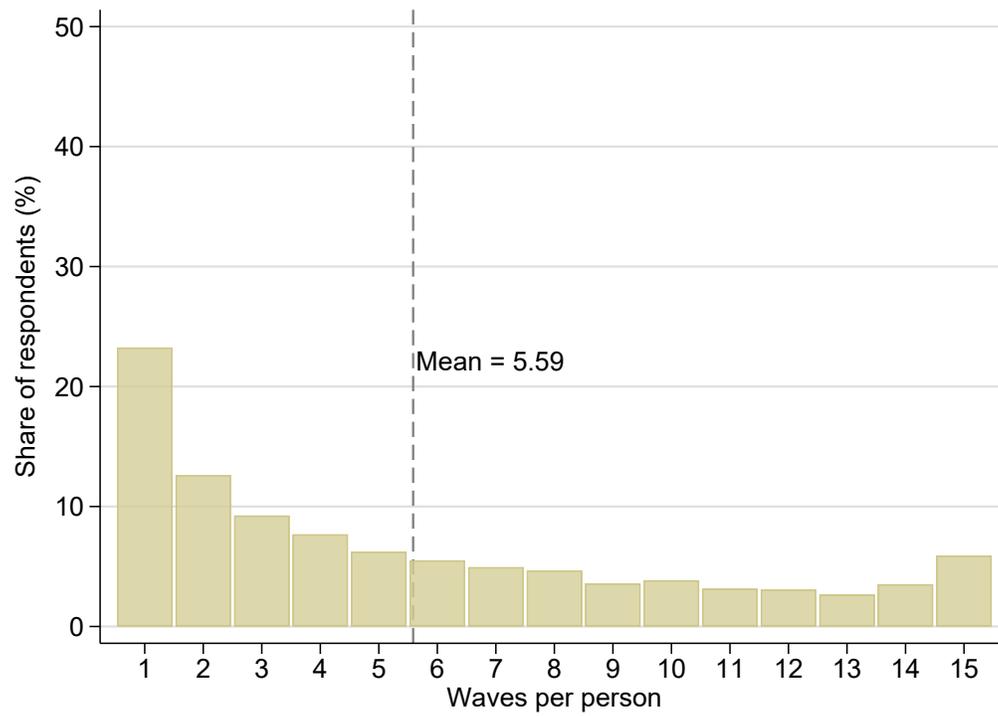


FIGURE 1. SAMPLE COMPOSITION ACROSS GALLUP WORKPLACE PANEL (2019–2025).

Note: This figure summarizes the share of the sample across survey waves in the Gallup Workplace Panel.

Source: Author's calculations using the Gallup Workplace Panel (2019–2025).

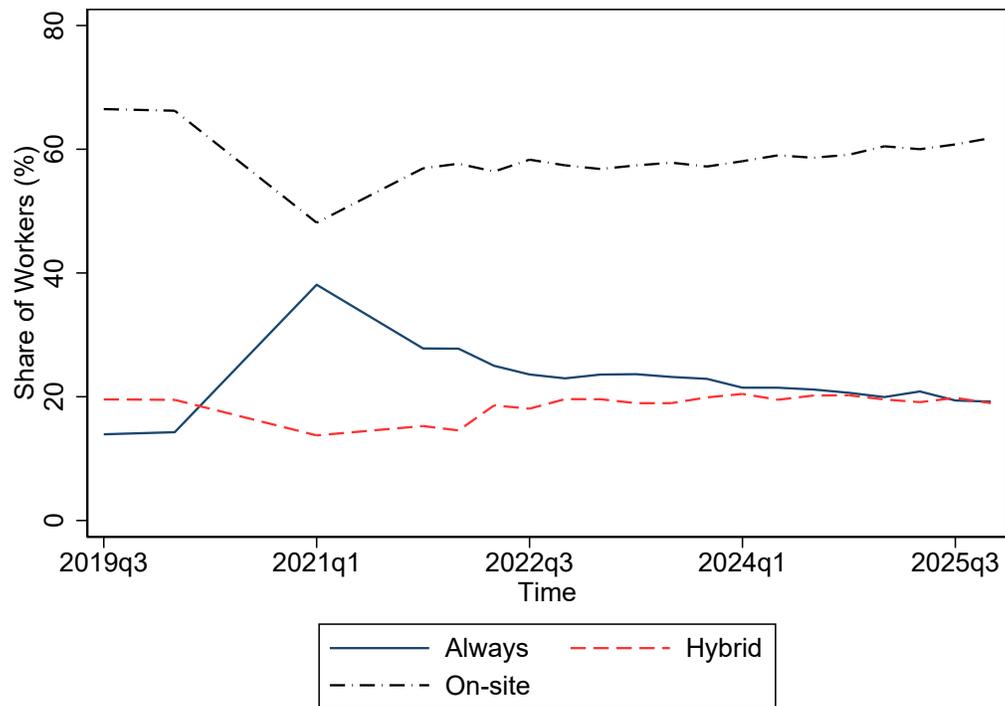


FIGURE 2. TIME SERIES PATTERNS IN REMOTE AND HYBRID WORK (2019–2025).

Note: This figure shows the share of respondents in the sample who are fully remote, hybrid, and on-site in the Gallup Workplace Panel. Workers are classified as on-site if the share is less than 20%, hybrid if the share is between 20-80%, and fully remote if the share is over 80%. The sample is restricted to full time workers, and survey sample weights are used.
Source: Author's calculations using the Gallup Workplace Panel (2019–2025).

TABLE 1—DETERMINANTS OF SWITCHING WORK ARRANGEMENTS

Dep. var. =	Switch to Remote		Switch to Hybrid	
	(1)	(2)	(3)	(4)
Remote in previous wave	0.042*** (0.004)	0.042*** (0.004)	0.043*** (0.005)	0.042*** (0.005)
Hybrid in previous wave	0.013*** (0.003)	0.013*** (0.003)	0.084*** (0.003)	0.083*** (0.003)
Male	-0.007*** (0.002)	-0.007*** (0.002)	-0.004* (0.002)	-0.006*** (0.002)
Age	-0.001*** (0.000)	-0.001*** (0.000)	-0.000*** (0.000)	-0.000*** (0.000)
Some college (no BA)	-0.000 (0.003)	-0.000 (0.003)	0.018*** (0.005)	0.018*** (0.005)
College degree or more	0.005* (0.003)	0.006** (0.003)	0.040*** (0.004)	0.040*** (0.004)
Has children	0.001 (0.002)	0.001 (0.002)	0.004* (0.002)	0.004* (0.002)
White	-0.009*** (0.002)	-0.009*** (0.002)	-0.006* (0.003)	-0.006* (0.003)
Year 2020	0.068*** (0.003)	0.068*** (0.004)	0.046*** (0.004)	0.043*** (0.005)
Year 2021	0.007* (0.004)	0.008* (0.004)	0.012** (0.005)	0.009* (0.005)
Year 2022	-0.004 (0.003)	-0.004 (0.003)	0.002 (0.004)	0.002 (0.004)
Year 2023	0.003 (0.003)	0.003 (0.003)	0.007** (0.003)	0.007** (0.003)
Year 2024	0.001 (0.003)	0.001 (0.003)	0.004 (0.003)	0.004 (0.003)
Education / Government / Community-Social		0.000 (0.002)		0.001 (0.003)
Health Care		0.005 (0.003)		-0.009** (0.004)
Business / Finance / Tech / Professional		0.001 (0.003)		0.010** (0.004)
Production / Utilities / Construction / Logistics		0.005** (0.002)		0.004 (0.003)
Other demographic controls	Yes	Yes	Yes	Yes
Year indicators	Yes	Yes	Yes	Yes
Industry-group FE (ind5)	No	Yes	No	Yes
Observations	89,908	89,908	89,908	89,908

Note:

This table reports average marginal effects from logit models estimating the probability that an individual switches from on-site work at time t to (i) fully remote work or (ii) hybrid work at the next observed wave. The key regressors are indicators for the individual's work arrangement in the prior observed wave: *was_remote_11* equals one if the individual was fully remote in the previous wave and *was_hybrid_11* equals one if the individual was hybrid in the previous wave (prior on-site is the omitted category). All specifications include demographic controls, year indicators, and (where indicated) industry-group fixed effects: Education/Government/Community-Social; Health Care; Business/Finance/Tech/Professional; Production/Utilities/Construction/Logistics; and Consumer-facing/Travel/Hospitality/Other/Unknown as the omitted group. Estimation uses analytic weights and standard errors clustered at the individual level.

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