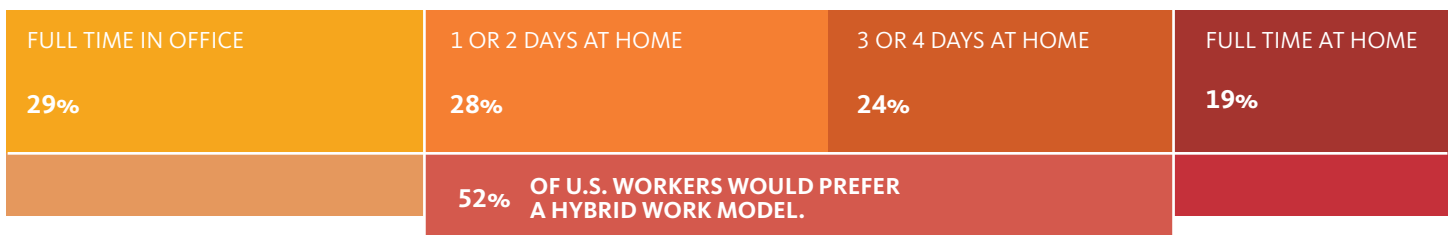
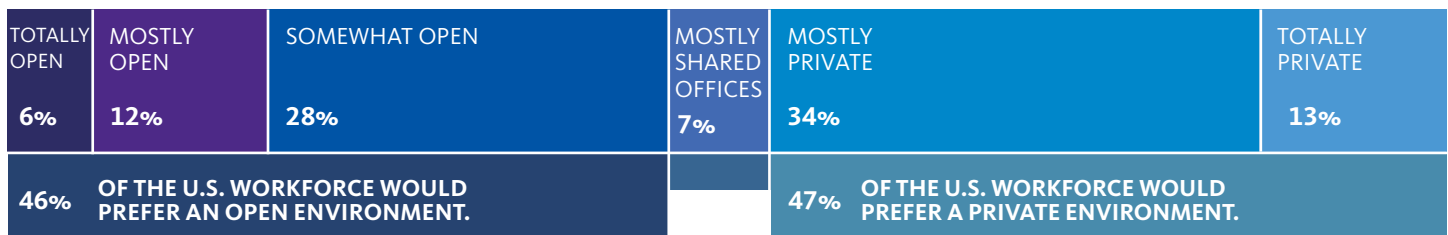


U.S. workers want to return to the workplace while keeping the benefits of flexibility and access to privacy they've enjoyed while working from home.

HOW MANY DAYS WOULD YOU PREFER TO WORK FROM THE OFFICE VS. FROM HOME?



WHAT IS YOUR IDEAL PHYSICAL WORKPLACE ENVIRONMENT?



As many U.S. office workers have now spent more than six months working during the COVID-19 pandemic, the impacts and realities—both good and bad—of working from home are settling in. **Most U.S. workers would still prefer to work from the office for the majority of a normal week—but they'll bring new expectations around flexibility, privacy, and space sharing with them as they return.** Only 19% of U.S. workers want to work from home full time; over half would prefer a hybrid of working from the office and from their home as they look to the future. What does this mean for the future of work and the workplace?

- 1) U.S. workers continue to see the physical workplace, and in-person collaboration, as key aspects of their jobs—and driving reasons behind their desire to return.**
- 2) They want to return to the workplace to collaborate and socialize, and for the long-term positive impact on their careers and organizational relationships.**
- 3) Many of the benefits of working from home—greater flexibility and access to privacy in particular—will need to be reflected in the future workplace.**

METHODS This survey of 2,300+ U.S. workers was conducted online via an anonymous, panel-based survey from July 22 to August 24, 2020. Respondents were required to be working full-time for a company, organization, or firm of 100 or more people, and to have worked in an office environment prior to the COVID-19 pandemic. At the time of data collection, respondents worked in a variety of scenarios: full time from home, part-time in the office (hybrid work model), and full time in the office. Respondents were evenly distributed across 10 industries and represent a wide range of seniority levels, roles, ages, and geographies across the U.S. For reference, respondents were categorized into the following generational cohorts: Generations Z and Millennials (18–39 years old), Generation X (40–54), Baby Boomers (55 and older).

For media inquiries, please contact Kimberly_beals@gensler.com / For more from the Gensler Research Institute, please visit www.gensler.com/research

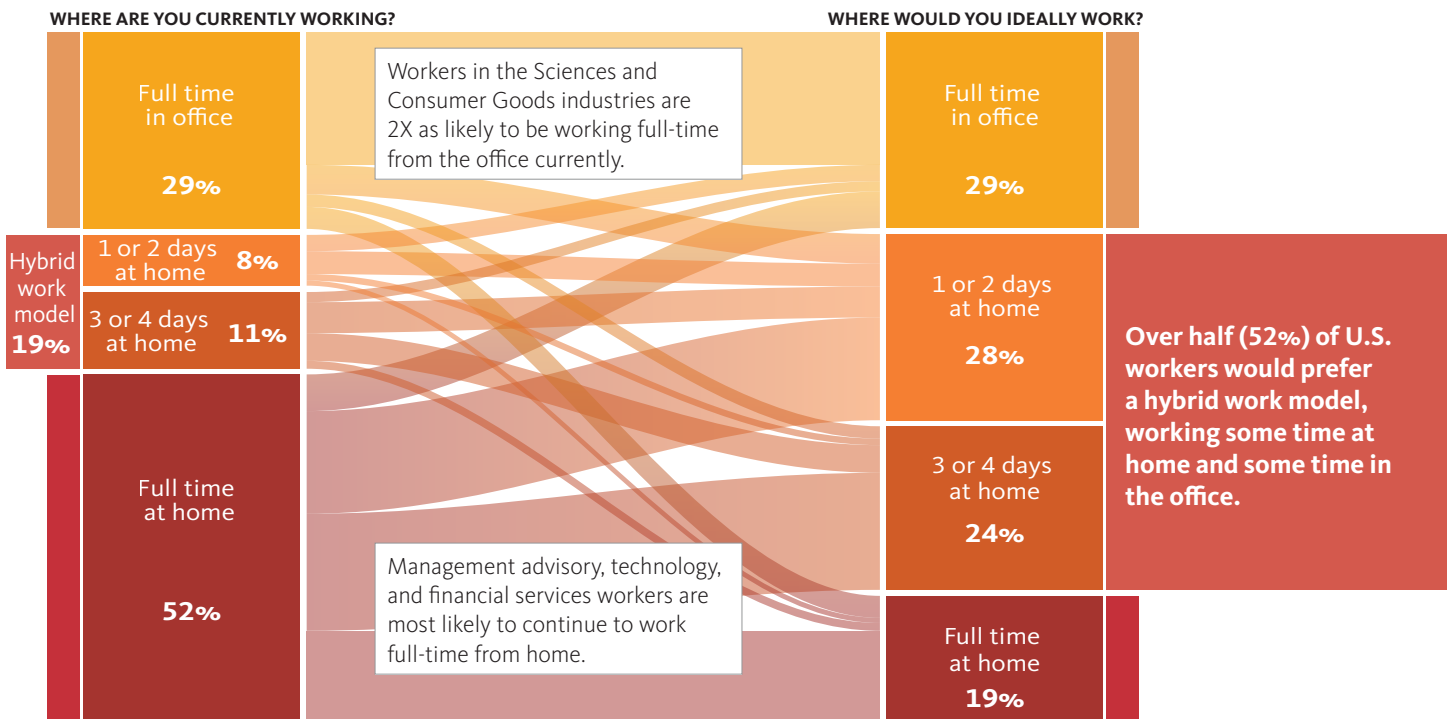
The Hybrid Future of Work

Less than one-third of U.S. workers are currently working full-time from the office. In the future, the majority would prefer a hybrid work model.

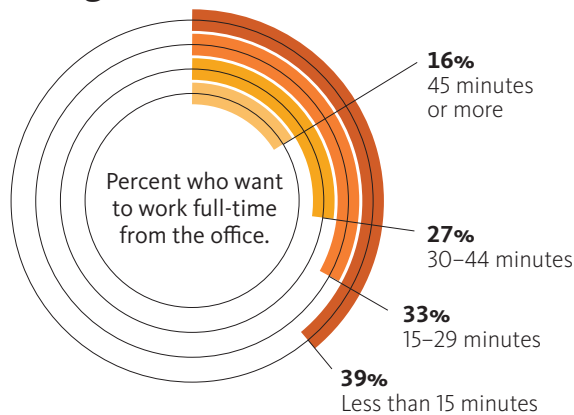
Most employees want a hybrid model. While over half of U.S. office workers are still working from home full time, 52% of workers would ideally split their time between the office and home during the typical workweek. In fact, only 19% of workers would spend their full workweek at home. However, preference for time spent at the office varies by the nature of an employee's day-to-day.

Those in the sciences or consumer goods are significantly more likely than management advisory, technology, and financial services to prefer working at the office full time. Administrative workers are most likely to prefer working from the office full time. And commute time appears to have a significant effect, with longer commutes drawing employees away from the office.

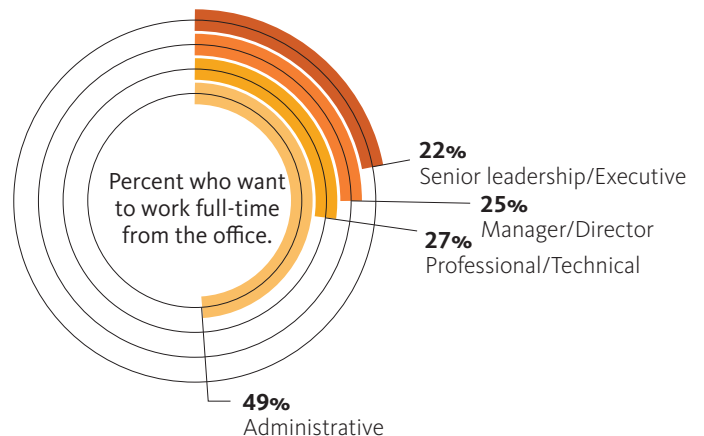
Over half of U.S. workers continue to work from home full time as a result of COVID-19; less than one in five would like to do so permanently.



Long commutes are a deterrent to returning full time.



Senior leaders are least likely to want to work from the office full time.



The Hybrid Future of Work

Most jobs continue to be reliant on in-person collaboration and the physical workplace.

Most workers report their jobs rely heavily on in-person collaboration, across roles and industries. That means that in-person collaboration transcends the day-to-day tasks of most workers. However, most employees have been working from home for over six months. Those who would ideally work full time from home are significantly less likely to say their job relies on in-person

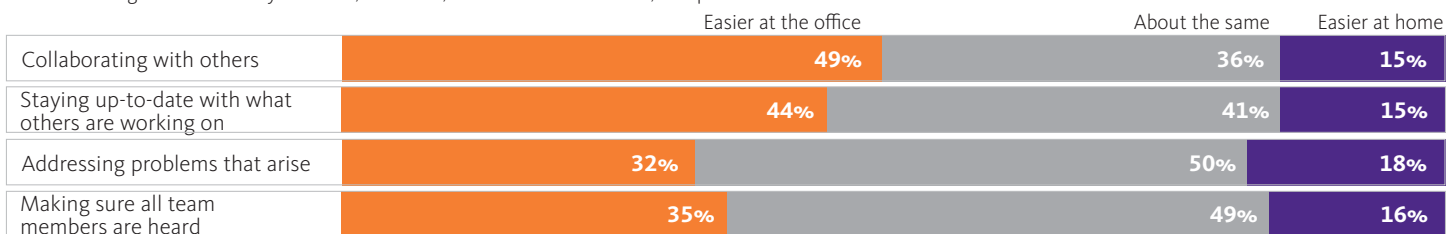
collaboration than those who would ideally work in the office full time. The people who want to spend their full week at the office also are more likely to say their job relies on specific spaces in the workplace. Collaboration is becoming increasingly important for today's work, and the office is still the best place to efficiently connect with others.

The majority of workers still say their jobs are reliant on in-person collaboration, despite working remotely for nearly half a year.



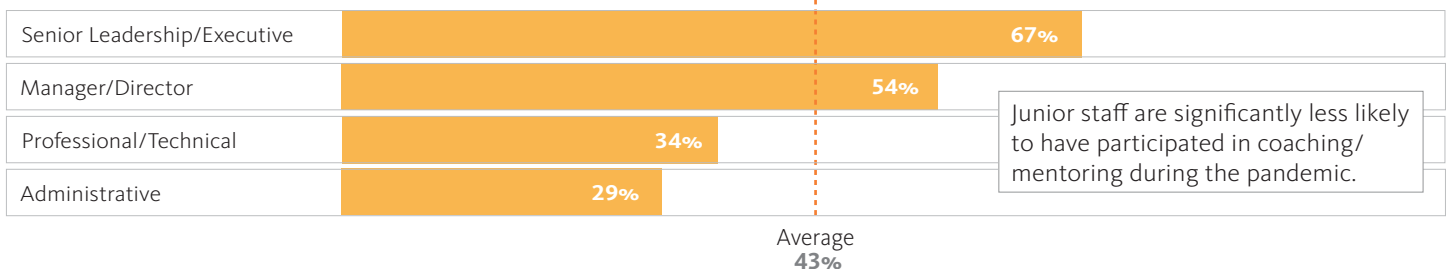
Collaboration, awareness, problem solving, and inclusive communication are where the office excels.

Percent who agree each activity is harder, the same, or easier to do at home, compared to the office.



Less than half of U.S. workers have participated in coaching or mentoring during the COVID-19 pandemic.

Percent who have participated in coaching/mentoring while working during COVID-19 by role.



The Hybrid Future of Work

Company and government policy continue to drive the work locations and behaviors of most U.S. workers—but those with choice tend to choose the office.

Most workers don't have much of a say in where they're working. But if they do, they're more likely to work full-time at the office. For many, working from the office is more productive than working from home, and for the share of workers who are choosing to be at the office full time or for the majority of their workweek, they say that is the primary reason why they are making their choice. Those who are spending most or all of their

time at home are more likely to do so out of concerns about COVID-19. Expectations of 83% are that they will return to the workplace when restrictions lift. As workers return to the office, balancing the demands of commuting, work/life, and health and well-being with their most productive work environment, many will choose a hybrid model that blends the flexibility of working from home with the efficacy of office working.

Global companies are significantly more likely to have their employees working full-time at home.

Percent who are currently in each work model by company size.

CURRENT WORK MODEL	Full time in office	1 or 2 days at home	3 or 4 days at home	Full time at home
Global	21%	6%	9%	64%
Regional	32%	8%	12%	48%
Local	41%	8%	16%	35%

Senior leaders are more likely to have already adopted a hybrid work model.

Percent who are currently in each work model by role.

CURRENT WORK MODEL	Full time in office	1 or 2 days at home	3 or 4 days at home	Full time at home
Senior Leadership/Executive	17%	8%	17%	58%
Manager/Director	25%	9%	14%	52%
Professional/Technical	29%	7%	8%	56%
Administrative	57%	4%	7%	32%

Workers choose the office to be productive; they choose home for convenience and safety. A hybrid model helps to balance both.

Of workers with choice in where they currently work, the top reasons for choosing their work model.

Rank	Full time in office	1 or 2 days at home	3 or 4 days at home	Full time at home
1	Working where I'm most productive	Working where I'm most productive	Concerns about catching and/or spreading COVID-19	Concerns about catching and/or spreading COVID-19
2	Working where I have the best computer/technology set-up	Concerns about catching and/or spreading COVID-19	Working where I'm most productive	Working where I'm most comfortable
3	To have a better workspace set-up/arrangement	Working where I'm most comfortable	Avoiding distractions	Saving time
4	Access to specific spaces in the workplace	Avoiding distractions	Working where I'm most comfortable	Working where I'm most productive
5	Working where I'm most visible or accessible to others	To have a better workspace set-up/arrangement	To have a better workspace set-up/arrangement	The commute
6	Working where I'm most comfortable	Access to specific spaces in the workplace	Access to specific spaces in the workplace	Saving money

The Hybrid Future of Work

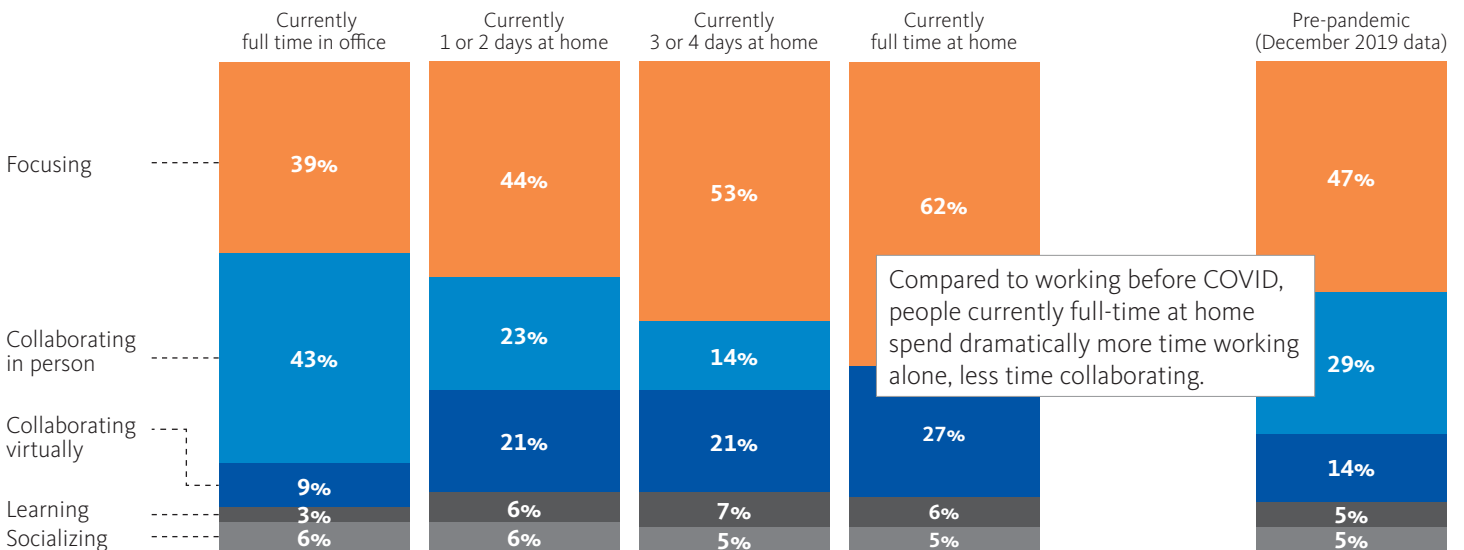
For workers already in a hybrid work model, the benefits of working this way are becoming clearer.

The hybrid work model has distinct benefits. Relatively few workers have had the experience of a hybrid work model, but of those who have, they've had a better experience than those who are either full-time at the office or full-time at home. During the pandemic, those in a hybrid work model have seen a greater boost to their personal creativity, work relationships, and productivity. With the added flexibility

of working from home, these employees can choose the environment that matches their day-to-day responsibilities. Time spent working from the office is also directly connected to time spent collaborating. By spending a portion of their workweek in-person with colleagues, those in a hybrid model are more likely to feel connected and engaged.

People currently working full-time from the office spend nearly 2X as much time collaborating compared to those full-time at home.

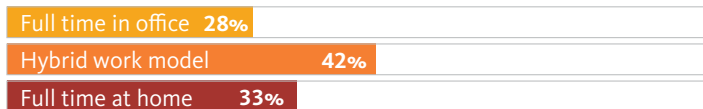
The average percent of time employees spend in each work mode by current work model.



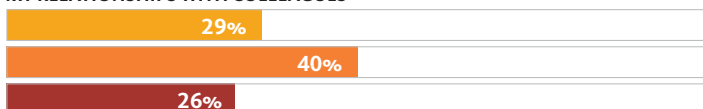
Those already in a hybrid work model report positive benefits to creativity, problem solving, and team relationships.

Percent of respondents who agree that working during the pandemic has positively affected each factor by current work model.

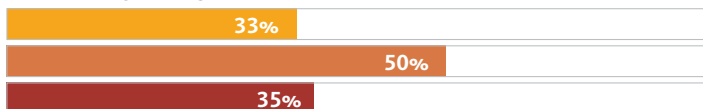
MY PERSONAL CREATIVITY



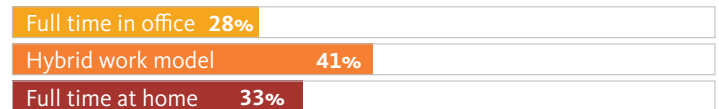
MY RELATIONSHIPS WITH COLLEAGUES



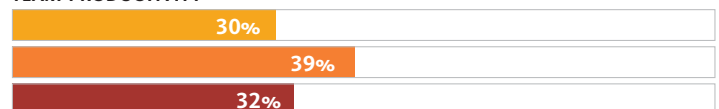
MY ABILITY TO MANAGE MY TEAM



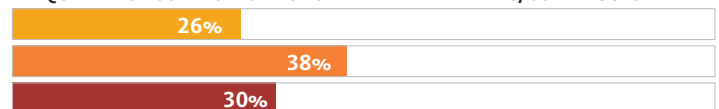
MY ABILITY TO SOLVE PROBLEMS



TEAM PRODUCTIVITY



MY QUALITY OF COMMUNICATIONS WITH TEAM MEMBERS/COLLEAGUES



The Hybrid Future of Work

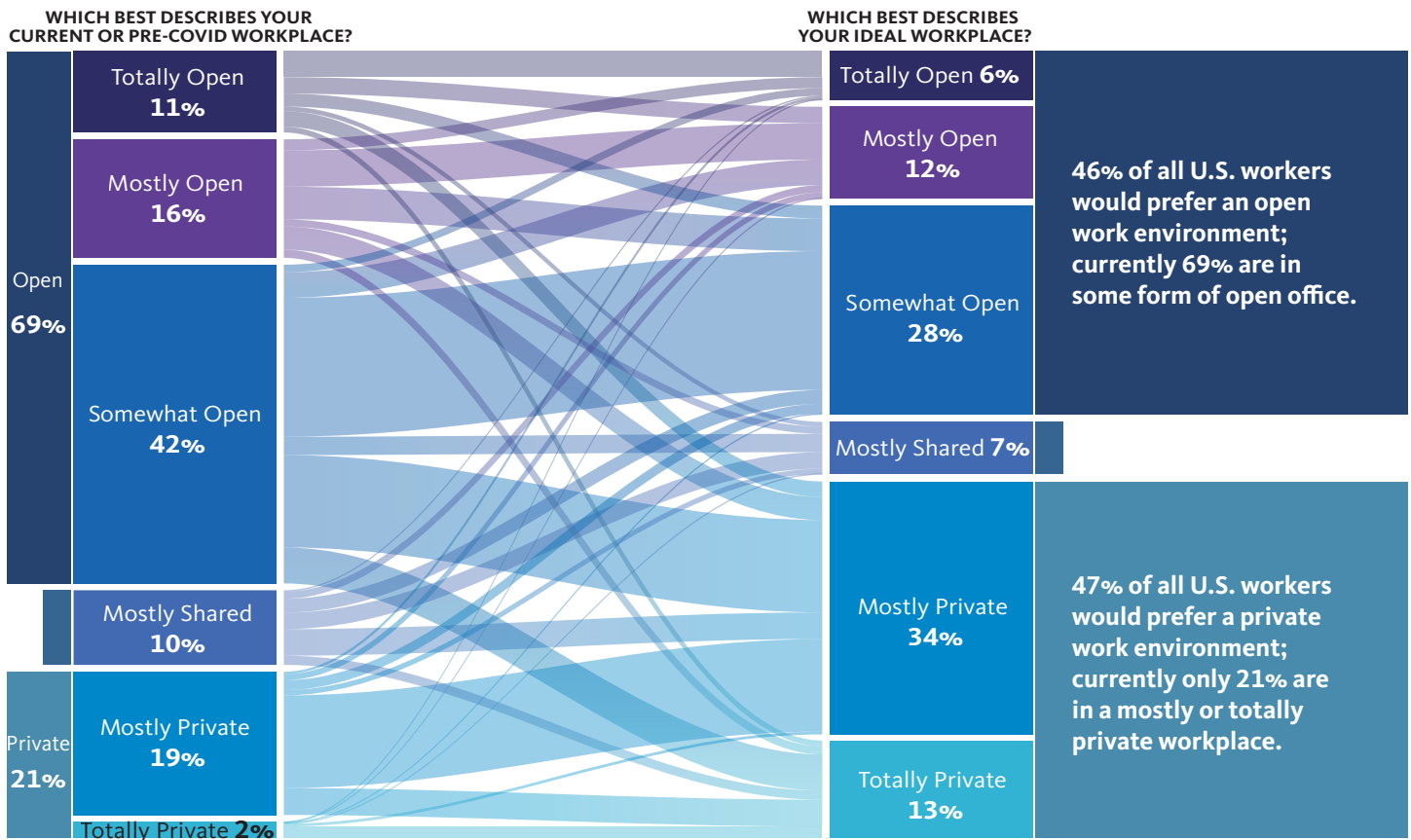
U.S. workers are anxious to return—but they expect more physical privacy in the workplace, and those currently in the office are already taking it.

Prior to the pandemic, offices were trending toward more and more open space. But that trend came at the detriment to focus work and personal space. Workers still preferred open environments, they just needed private space when needed throughout the day. Currently, the pandemic has increased workers' demand for private space. Only about half of workers are back at the office in some capacity. Of that group, the majority,

or 42%, are in somewhat open environments. Ideally, however, those who are back at the office would choose mostly private environments. Prior to the pandemic, Gensler research demonstrated that mostly open environments were both most effective and most popular. But that dynamic has changed. With more workers headed back to the office, workplaces must balance the need for more personal space for more workers.

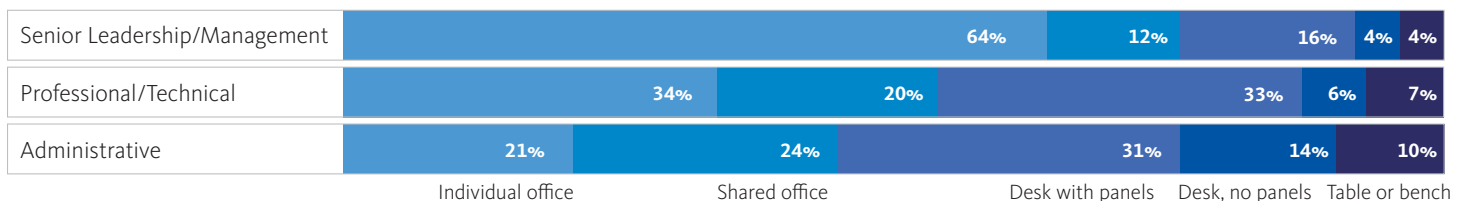
Workers currently sit in environments across varying degrees of openness; many are asking for more private environments than they currently have.

The percent of workers who are currently in each office typology, compared to the office typology they prefer.



For those currently working from the office, assigned spaces are largely private—particularly for those in senior leadership.

Of respondents who work at least some of their workweek from the office and have an assigned seat, their assigned workspace type by role.



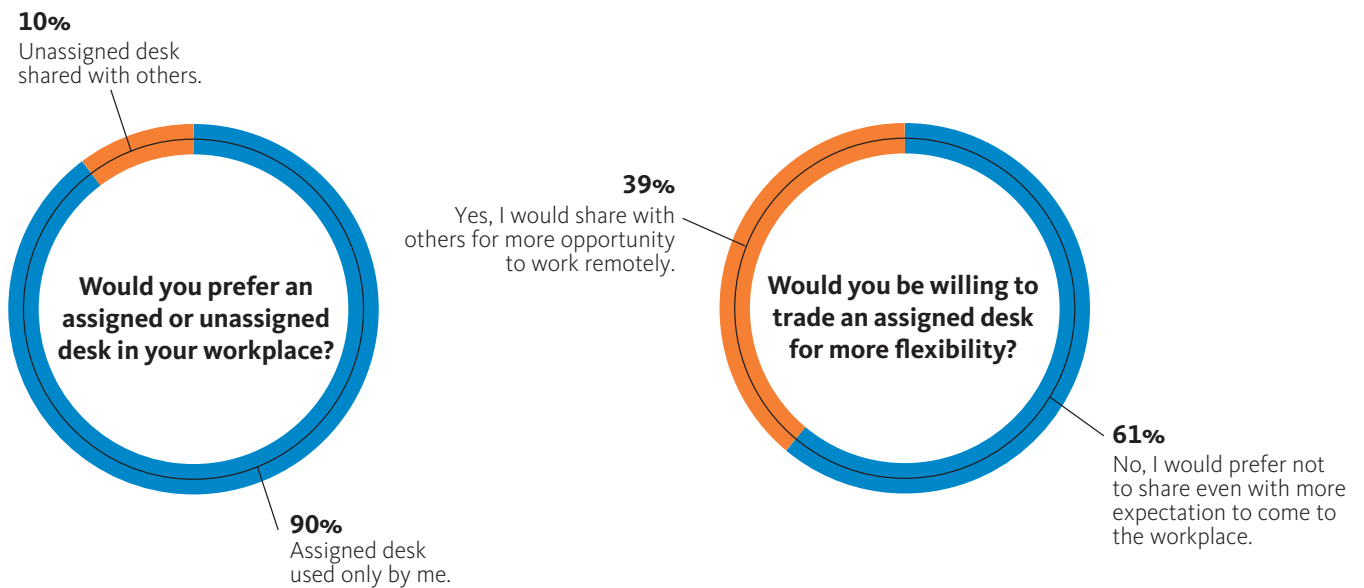
The Hybrid Future of Work

U.S. workers are wary of desk sharing, and many are willing to trade greater flexibility to keep an assigned seat in the office.

Before the pandemic, 50% of American workers who had an unassigned seat wanted their seat back. Unassigned seating was working for those whose job relied heavily on in-person collaboration, and not for those who needed to spend more time focusing. Now, there are more workers than ever who want an assigned seat. Further, most U.S. workers are willing to trade the flexibility to work

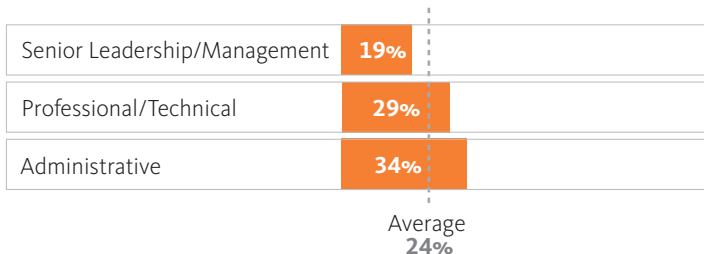
from home for an assigned seat at their office. Of those who are back at the office, senior leadership is more likely to get their preferred seating arrangement. Administrative and professional/technical workers are more likely to be in unassigned seating. For now, unassigned seating is found to be less conducive to social distancing, privacy, and health and well-being than assigned seating.

U.S. workers dramatically prefer assigned seating—and despite a desire for flexibility, two-thirds are not willing to trade flexibility for an assigned seat.



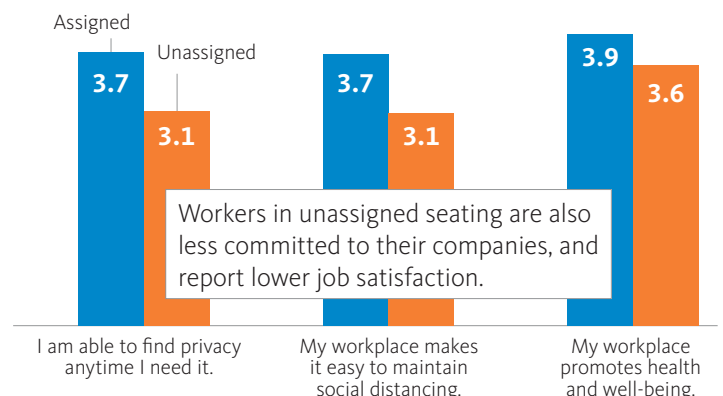
A third of administrative, professional, and technical workers currently in the office are in unassigned seating—dramatically more than pre-COVID.

Of respondents who work at least some of their workweek from the office, percent who are in unassigned seating by role.



Those currently working in unassigned seating struggle to find privacy, and to maintain social distancing.

Average agreement rating (1–5 scale) for each statement by those in assigned versus unassigned seating.



The Hybrid Future of Work

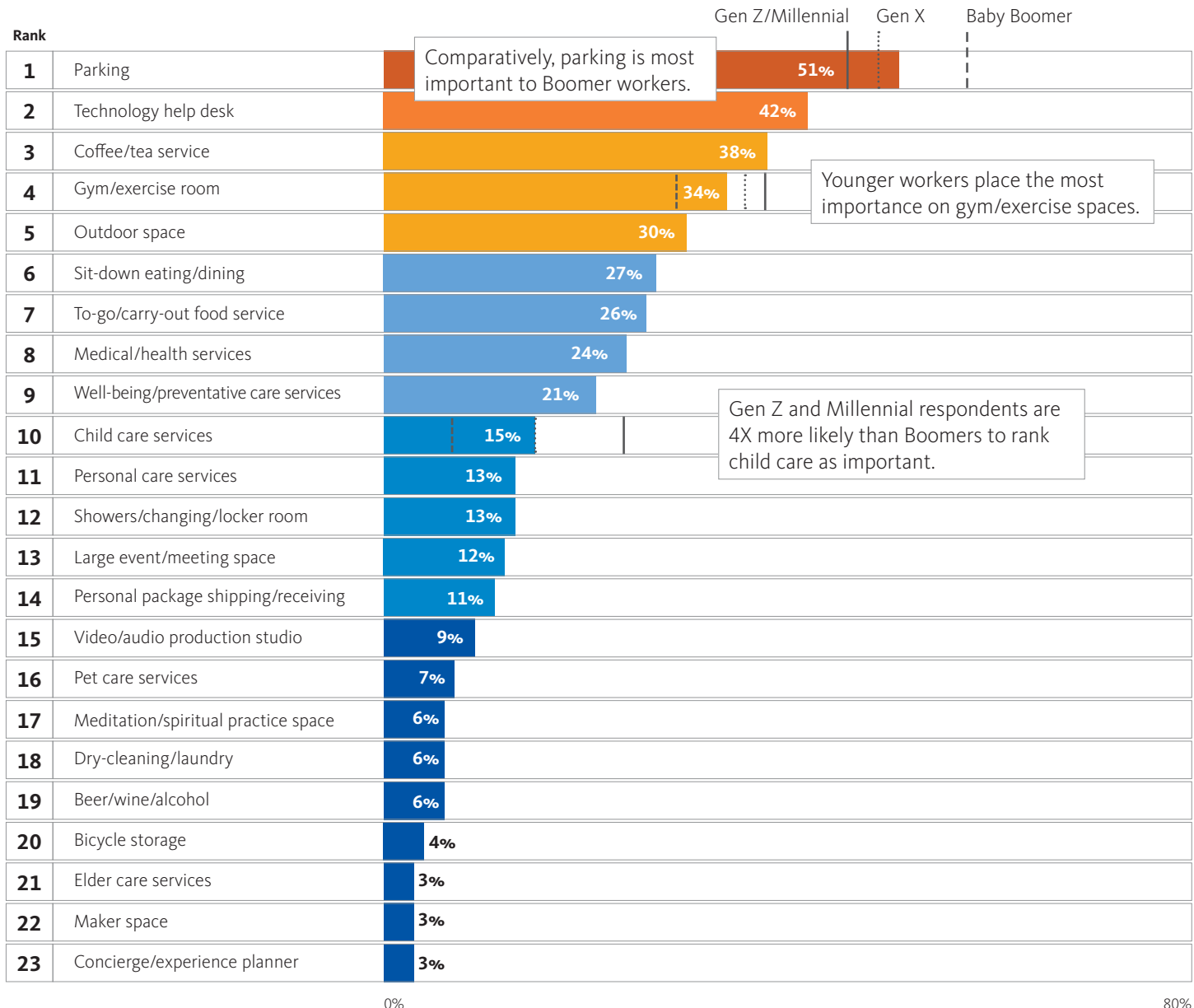
Across all demographic groups, the amenities desired by most workers are highly pragmatic—with parking at the top of the list.

Workers are not asking for the frills; the amenities workers are asking for are pragmatic. With nearly 9 out of 10 employees now commuting to the office by car, parking is the most desired amenity across all generations. Technological support, coffee and tea, food services, and gym access concern either streamlining work processes or providing key services that workers would

have to locate off-site. Millennial and Gen Z workers are more likely to want child care services and gym or exercise rooms, as these workers may put a greater emphasis on health and well-being and are increasingly more likely to have kids. Medical and health services, however, does rank as a top 10 amenity across all generations.

As workers look to the future, the most desired amenities are highly pragmatic—and workers are focused on parking.

Respondents were asked to select the top 5 most important amenities for a workplace or office building to offer. The following percentages represent the proportion of respondents who selected each amenity as one of their top 5.



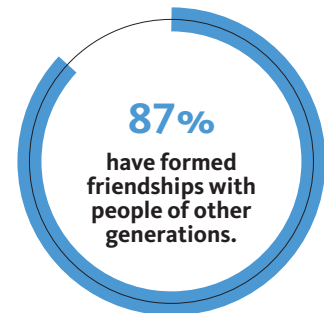
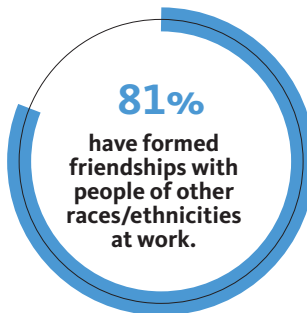
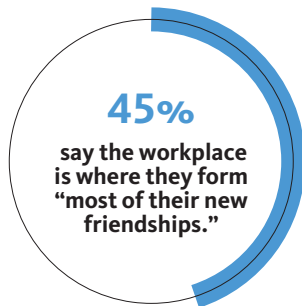
The Hybrid Future of Work

The physical workplace is a key place to experience and foster diverse and positive personal and professional relationships.

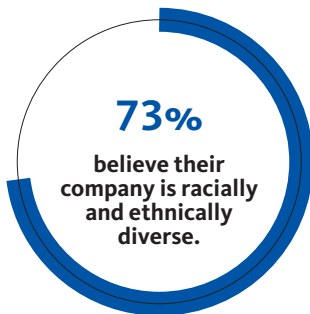
Most workers believe their team and their company is diverse. But less than half say the same about their company's leadership. While workers may believe their firms are inclusive to racial and ethnic minorities, our sample's senior leadership is disproportionately white. Importantly, the workplace is a primary place where people create friendships with those of different races and ethnicities.

But the upsides to racial and ethnic diversity are more than just interpersonal. Those with diverse organizations feel more empowered, have greater job satisfaction, and believe their company is more aligned with their personal values.

The workplace is where people form diverse relationships across races, ethnicities, and generations.

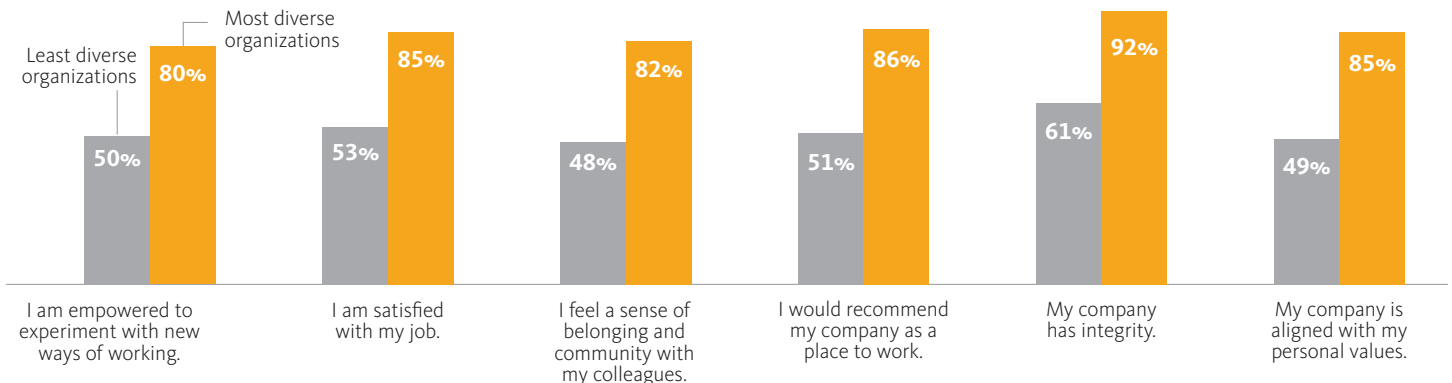


Nearly 3 in 4 workers see their company as racially and ethnically diverse, though leadership diversity lags behind.



Workers in diverse organizations are more empowered and engaged, and feel more positively about their companies.

Percent of respondents for whom the item is true by level of organizational diversity.



The Hybrid Future of Work

Adopt a hybrid work model by expanding workplace choice to include the home.

People already in a hybrid work model are already experiencing positive benefits to creativity, problem solving, and team relationships. Supporting hybrid work may be the next evolution of workplace choice. For years, our data has shown that employees

who have the flexibility to work in multiple locations are happiest, more satisfied with their jobs, and have the best experience. The future workplace can leverage those benefits to help employees optimize their own performance.

52%

prefer a hybrid work model.

Provide both ample private spaces and spaces that promote collaboration and social connection.

U.S. workers have been asking for more private space in their workplaces for years—pandemic and social distancing concerns appear to have furthered this desire. But for many, the pandemic is also acting as a catalyst pushing the nature of in-person work

even more toward collaboration, suggesting a renewed focus on multiple collaborative space types. To serve myriad functions, workplace strategy and planning must focus directly on the needs of workers across each hybrid work model.

47%

want a mostly or entirely private work environment.

Design flexible solutions with employees' concerns about desk sharing in mind.

Even pre-pandemic, the majority of U.S. workers were lukewarm on desk sharing, and half of those in unassigned seating would have preferred not to be sharing desks. Workers who are back at the office are more likely to have both an assigned seat and a private office, unlike prior to the pandemic.

As more workers return to the workplace, that dynamic may not be sustainable. Organizations must plan for both the workers who need flexibility, and those who may want an assigned seat in place of that flexibility.

61%

would prioritize an assigned seat over greater flexibility to work remotely.

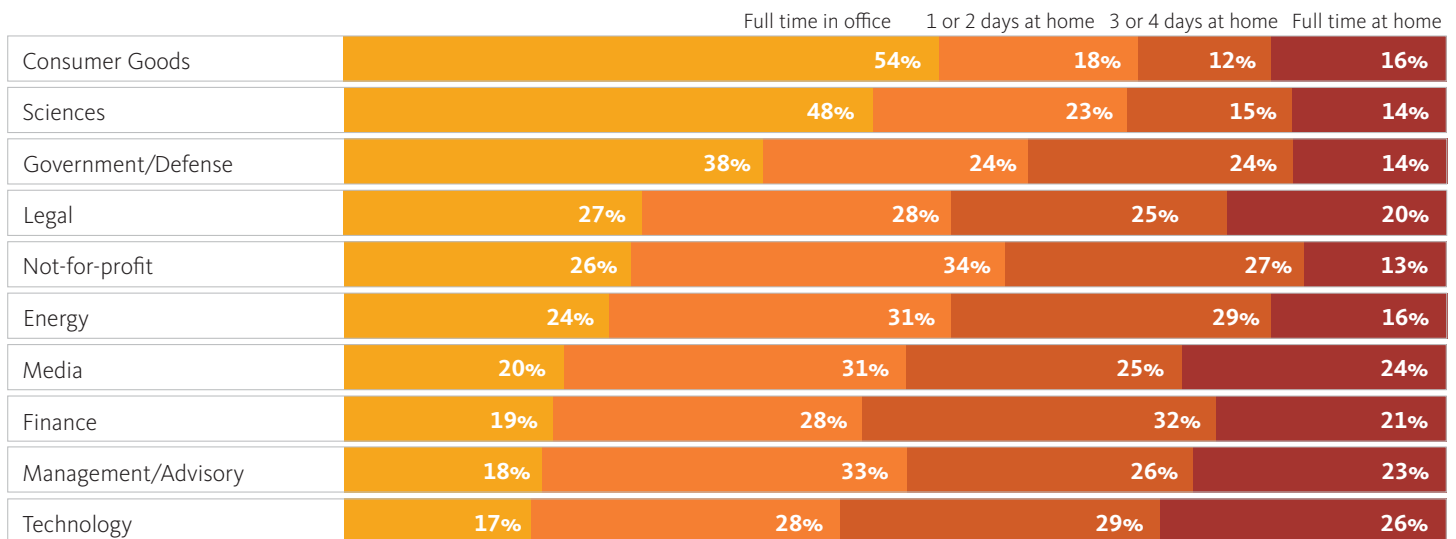
The Hybrid Future of Work

Most workers would prefer a hybrid work model in the future, but with significant variations by industry.

Most workers want the flexibility to work from home, while spending some of their workweek at the office. While the proportion of workers who want to spend their full workweek at home is relatively consistent, the proportion of those who want to work from the office full time varies by industry. Consumer goods, sciences, and government/defense workers are significantly more likely to want to be at the office full time.

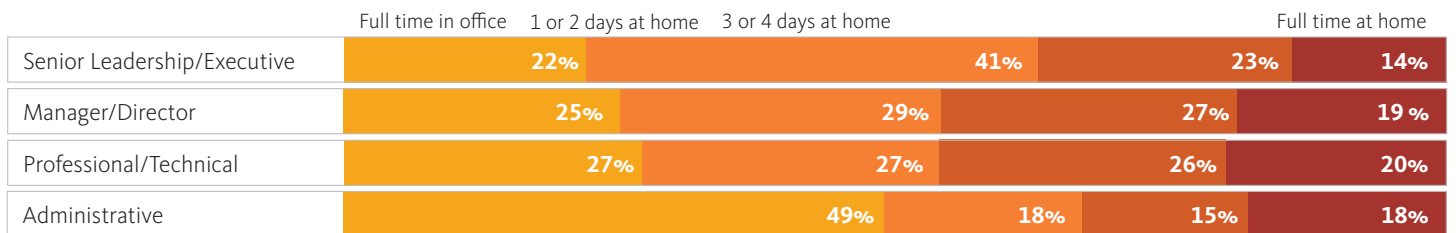
Gen X and Millennial workers are also more likely to prefer a hybrid model than Baby Boomers. Work model preference can vary by whether one's job function relies heavily on specific spaces in the office or in-person collaboration. It can also vary by the efficacy of home or office environments, where higher-performing environments can influence where an individual prefers to be.

Technology, financial, and management advisory workers are most likely to want to work full-time at home; consumer goods, sciences, and government workers are most likely to want to be full-time in the office.



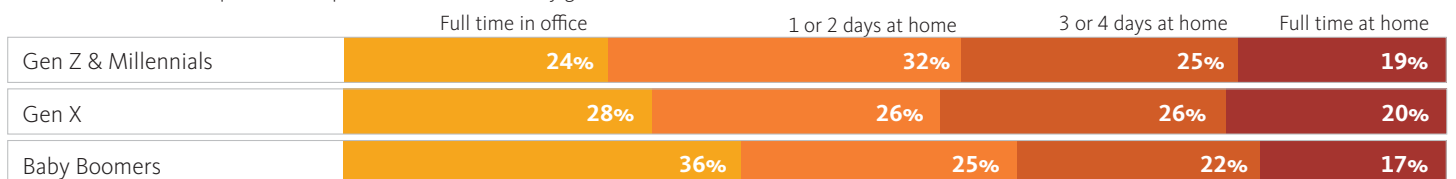
Administrative workers are far more likely to prefer working from the office full time.

Across all industries, the percent who prefer each work model by role.



Desired time in the office during an average week does not show significant variation by generation.

Across all industries, the percent who prefer each work model by generation.



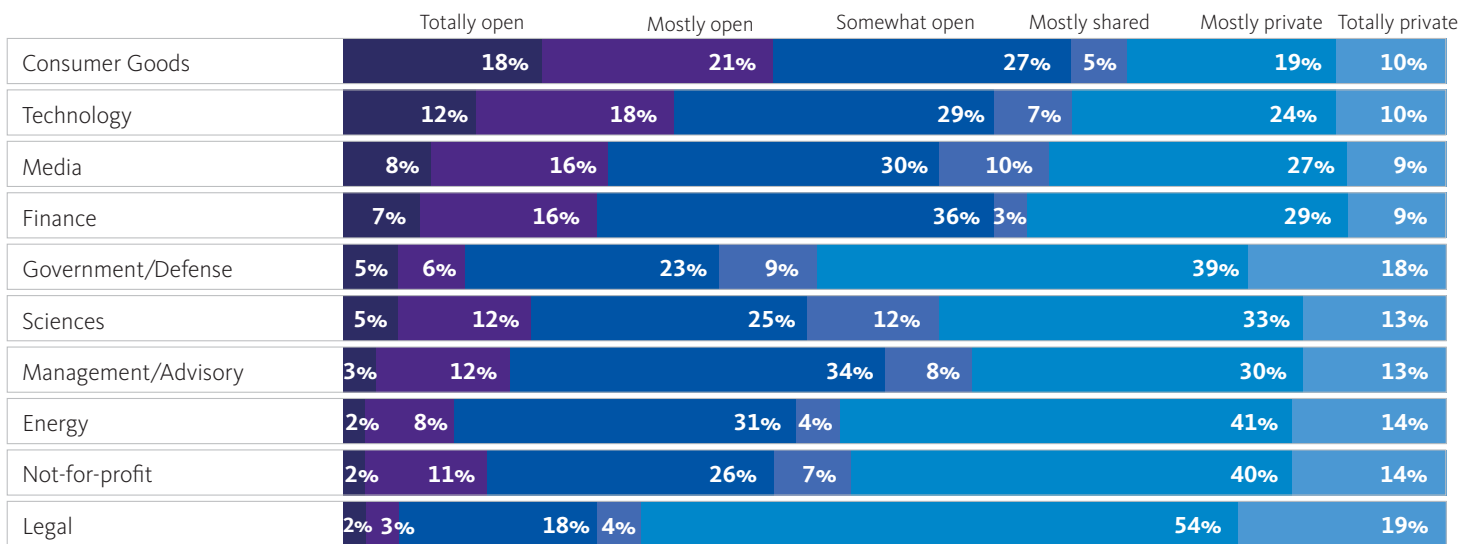
The Hybrid Future of Work

Nearly half of U.S. office workers would prefer a private environment at work. Legal and government workers are most focused on privacy.

Over the past several years, workers have been asking for more private space. But while 66% of those in consumer goods prefer open environments, 73% of legal workers want private environments. Day-to-day responsibilities can influence preferred office environments, but so does each industry's legacy. Historically, legal offices have a heavier lean on private offices, while technology firms have been pushing for more open environments.

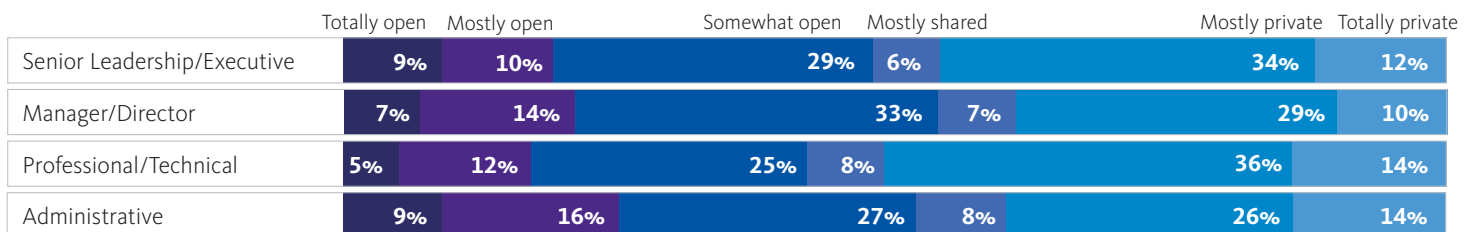
The office is a place for serendipitous interactions, social connection, and the focal point in the shift toward more collaboration. Younger workers may value these things more than their older peers, and they are also more likely to prefer open environments. Surprisingly, while senior leaders are more likely to have private offices, workers across roles are similar in their preferences for both private and open environments.

People in the Consumer Goods industry are most likely to prefer open environments, followed by technology and media workers.



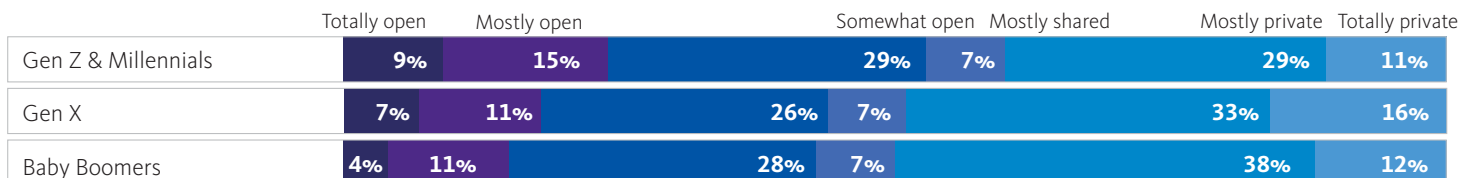
The preference for more private work environments does not vary significantly by role.

Across all industries, the percent whose ideal workplace is each degree of openness by role.



Gen X and Baby Boomer workers are most likely to prefer private environments; Gen Z is most likely to prefer open ones.

Across all industries, the percent whose ideal workplace is each degree of openness by generation.



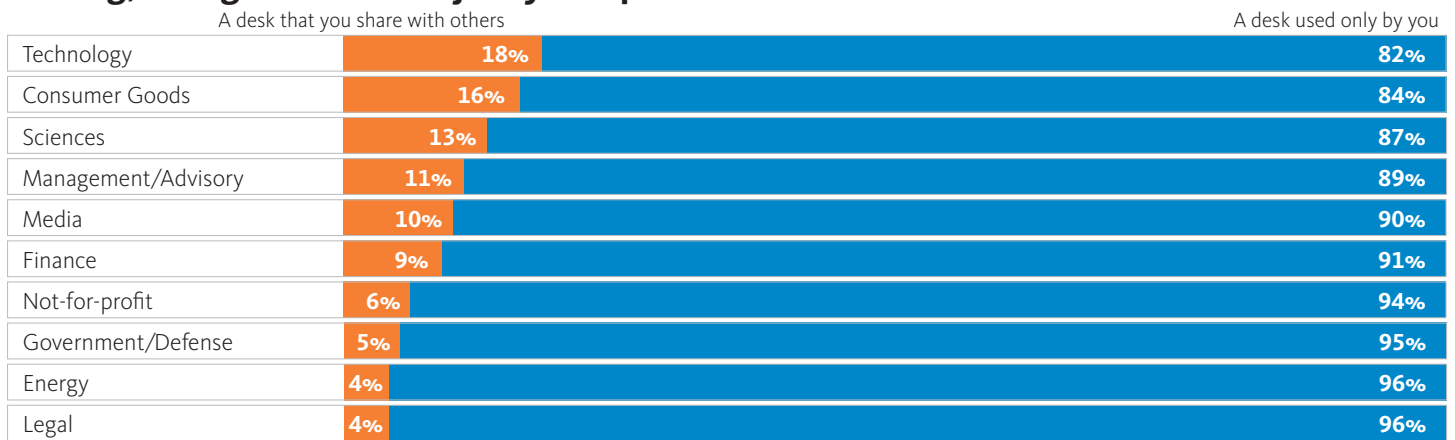
The Hybrid Future of Work

Across industries, U.S. workers are wary of desk sharing. Most would prefer having an assigned desk over greater flexibility to work from home.

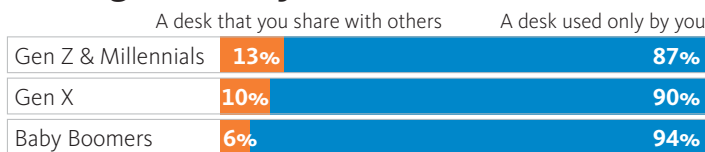
Unassigned seating was a burgeoning trend prior to the Covid-19 pandemic. The vast majority of workers now prefer assigned seating, with little variation across industry, generation, and role. In a trend similar to the preference for open environments, younger workers, those in technology, and senior leaders are most likely to be open to desk sharing—but not by a significant margin.

When choosing between the option for more flexibility or an assigned seat, a significant share of workers choose flexibility. However, the majority of workers across all industries would still choose an assigned seat. There may be a tie between receptiveness to unassigned seating and this choice, as those in the legal industry are the most likely to choose an assigned seat in exchange for greater flexibility.

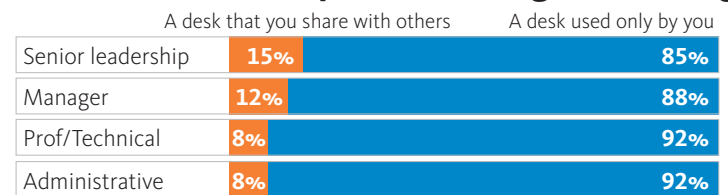
Technology and Consumer Goods workers are most open to unassigned seating, though the vast majority still prefer their own desk.



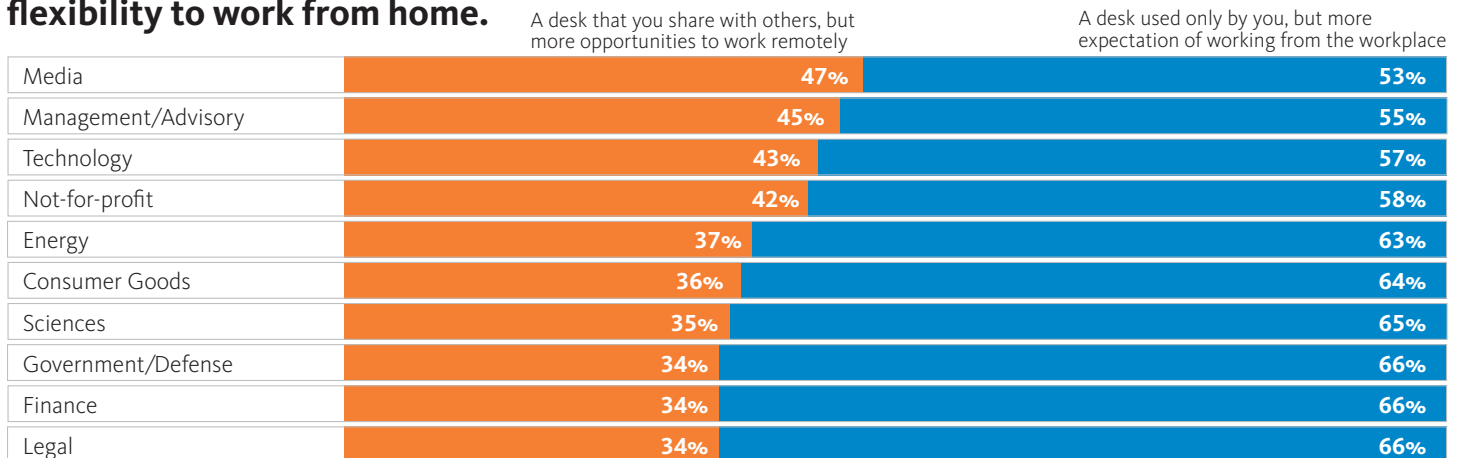
Baby Boomers are least open to unassigned seating, with only 6% in favor.



Administrative, professional, and technical workers are least open to unassigned seating.



Across U.S. industries, most workers would prioritize an assigned seat over greater flexibility to work from home.



The Hybrid Future of Work

Few people had worked from home regularly prior to COVID-19. Most now see home environments as more effective than offices.

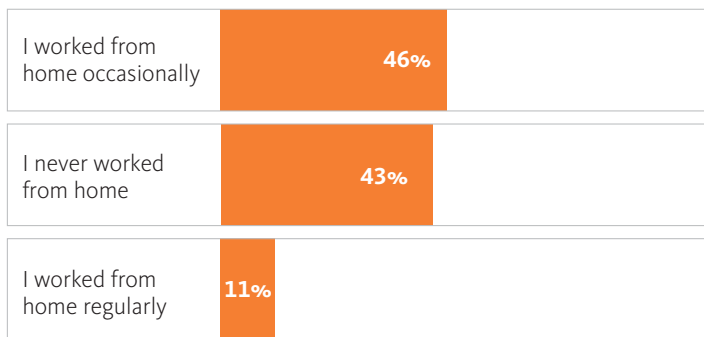
While many workers had worked from home occasionally prior to COVID-19, only 1 in 10 had worked from home as a regular part of their typical workweek. When comparing home and office environments, the home outperforms on most work modes—particularly individual work.

The office is still viewed as a catalyst for collaborative work and social relationships; working from home can't easily replace the

power of in-person work with colleagues. But we are beginning to see how the experience of working from home has raised the bar for office environments. Notably, home interiors outperform offices on access to the outdoors, privacy, noise, climate control, and adjustability.

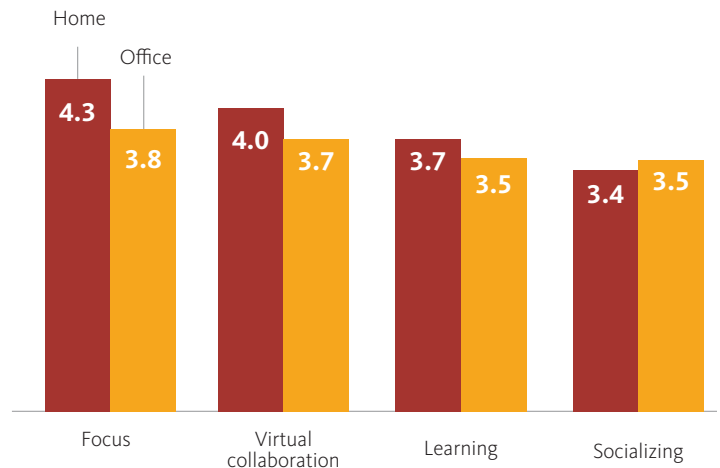
Only 1 in 10 workers worked from home regularly prior to Covid-19.

Percent of respondents with certain level of experience working from home prior to COVID-19. Data is from Gensler's 2020 U.S. Work from Home Survey (collected April/May 2020, n=2,349).



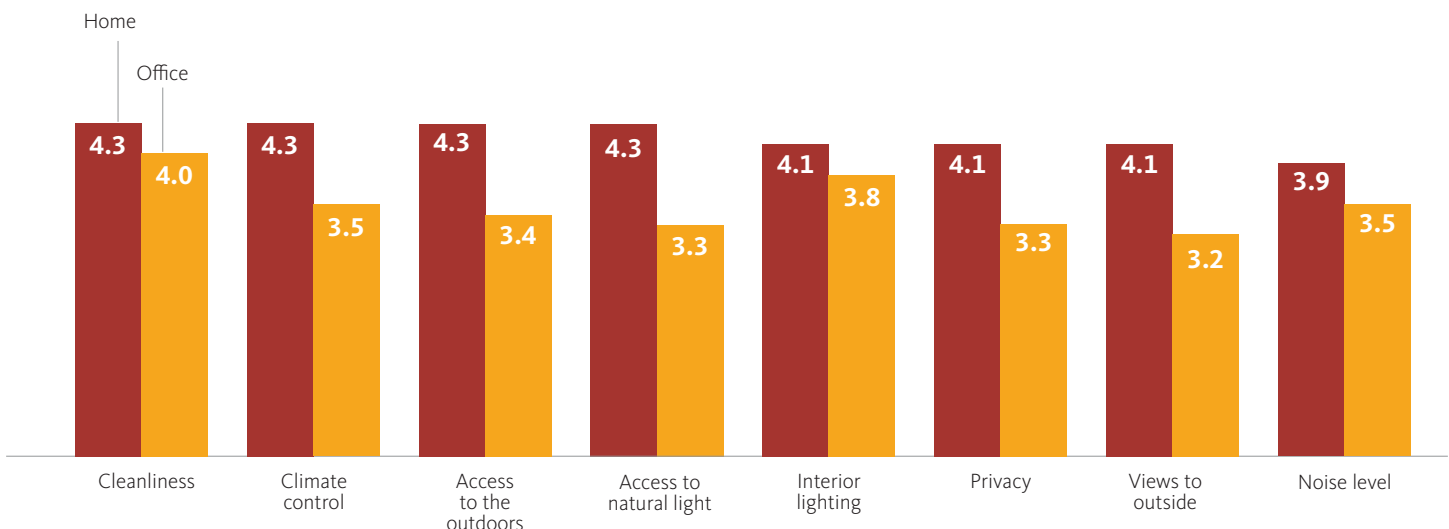
On average, workers rate their homes as more effective than the workplace for many activities.

Mean effectiveness ratings of home vs. workplace environments on a Poor (1) to Excellent (5) scale.



Respondents also see their homes more positively than their workplace environments across a number of key variables.

Mean ratings of home vs. workplace environments for each attribute on a Poor (1) to Excellent (5) scale.



The Hybrid Future of Work

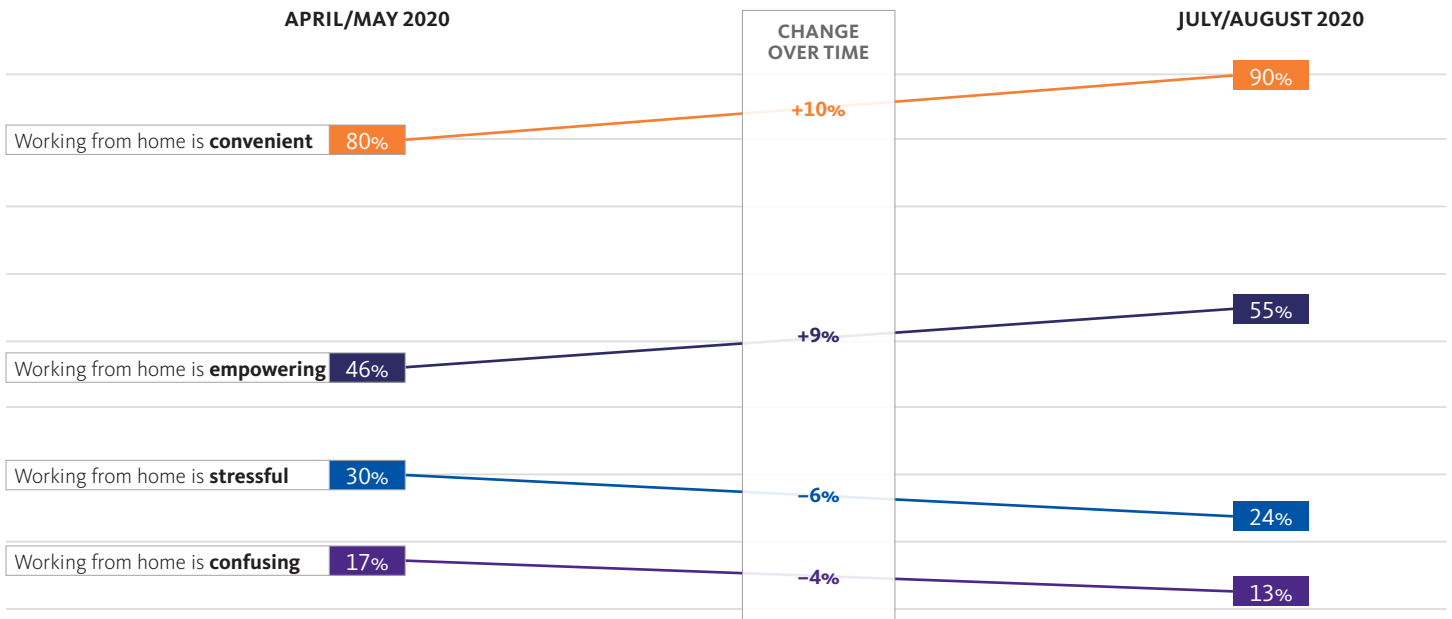
People are getting better at working from home, but still struggle to collaborate—and with feelings of loneliness and disconnection.

While about half of workers still find working from home lonely, the share of workers who believe working from home is convenient and empowering has increased since the first weeks of the pandemic. After working from home for months, fewer find the arrangement to be stressful or confusing. Workers are also seeing pragmatic benefits of working from

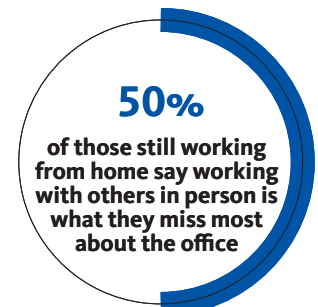
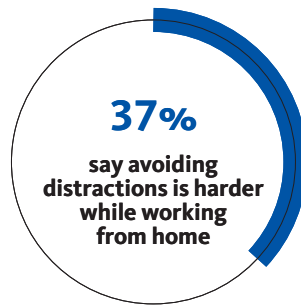
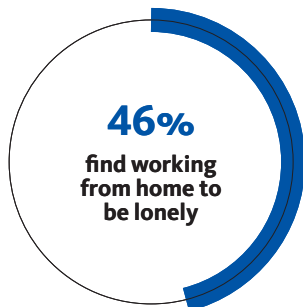
home, with most finding it easier to maintain a work/life balance and avoid distractions. Employees were less likely to say collaborating with others and staying up-to-date with their colleagues is more difficult at home in the most recent survey. However, most workers still believe that connecting with others is made harder by working from home.

As the pandemic continues, people find working from home less stressful and more empowering.

Percent of respondents who agree with the following descriptors of the work from home experience.



Workers continue to find working from home lonely, and many struggle to avoid distraction.



The Hybrid Future of Work

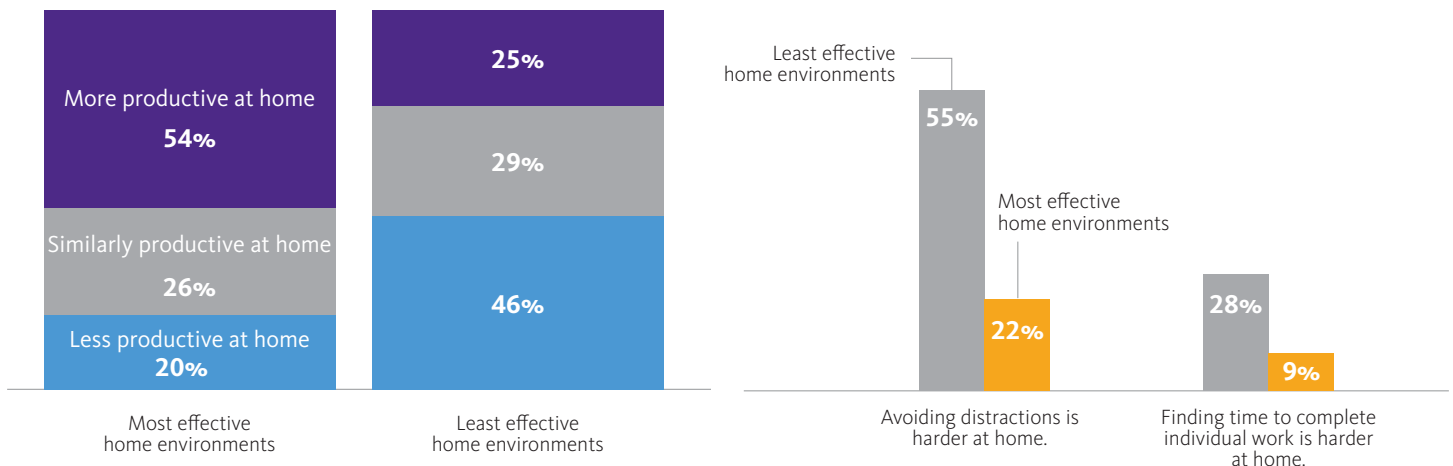
Not everyone has an effective environment for home work—for these workers, the office is important as a place for individual work, too.

The hybrid model is contingent on the effectiveness of both office and home environments. Past Gensler research has proven that effective office environments are related to key outcome variables like job satisfaction, engagement, and innovation. The efficacy of home environments shows a similar dynamic.

Key factors in effective home environments include privacy, design look and feel, noise, comfort of seating, and lighting. Of those with the most effective home environments, 55% say they are more productive at home—twice the amount of respondents than those with the least effective environments. In fact, only 60% of those who want to work full time at the office have an effective home environment.

Workers with ineffective home work environments are 2X more likely to report lower productivity while at home.

People with ineffective home environments are 2.5X more likely to find it harder to avoid distractions and complete individual work.



Similar to the office, the most effective home environments are comfortable, private, and manage noise.

Mean rating of attribute on a Poor (1) to Excellent (5) scale by effectiveness of home work environment.

