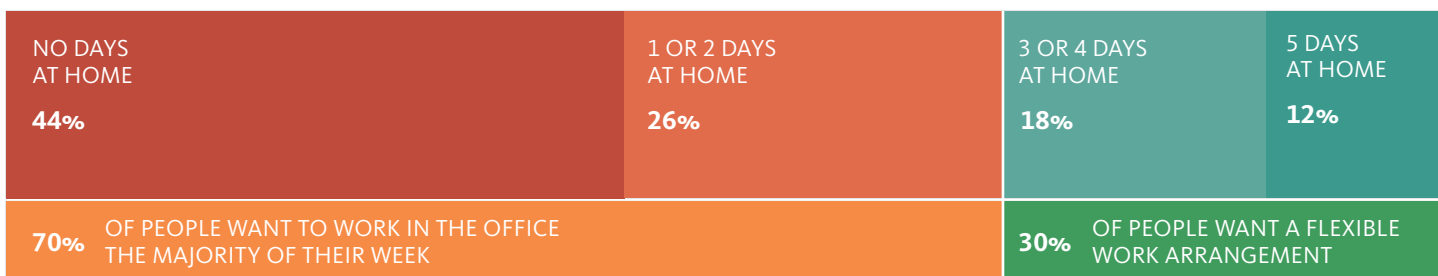


Only 12% of U.S. workers want to work from home full-time. Most want to return to the workplace, but with critical changes.

DO YOU PREFER TO GO BACK TO THE OFFICE OR CONTINUE TO WORK FROM HOME?



They want more space (less density) for social distancing and an assigned workspace. These measures can also improve the performance of the workplace, addressing issues of noise and distraction that were already diminishing effectiveness.

Their spaces could be used for other functions when not in use as workspaces, given their intermittent need. Ample social distancing space, and recommended cleaning protocols, will still be crucial.

The lessons learned from the experience of working from home during COVID-19 offer an unprecedented opportunity to rethink the future of the physical workplace. Only one in ten U.S. office workers had worked from home regularly before this experience, and less than a third had the choice to work from home. While many of the effects of COVID-19 on the workplace are still unfolding, some points are emerging clearly from our data:

- 1) Most workers want to come back to the office.**
- 2) Workers expect crucial changes to the workplace before they're comfortable returning.**

The changes that will make people comfortable coming back to the office also offer an opportunity to address problems that already existed in the physical workplace, from issues with noise and density, to challenges related to mobility and unassigned seating.

The preference for working in the office is consistent with Gensler's workplace research data collected regularly since 2005. Workers with choice in where to work prior to COVID-19 spent 72% of their average work week in the office compared to only 12% working from home, overwhelmingly choosing the office as their preferred place to work.

METHODS The survey of 2,300+ U.S. workers was conducted online via an anonymous, panel-based survey from April 16th to May 4th, 2020. Respondents were required to be working full time for a company of 100 or more people, to have worked in an office environment prior to COVID-19, and to be currently working from home. Responses were evenly distributed across 10 industries and represent a wide range of seniority levels, roles, ages, and geographies across the U.S.

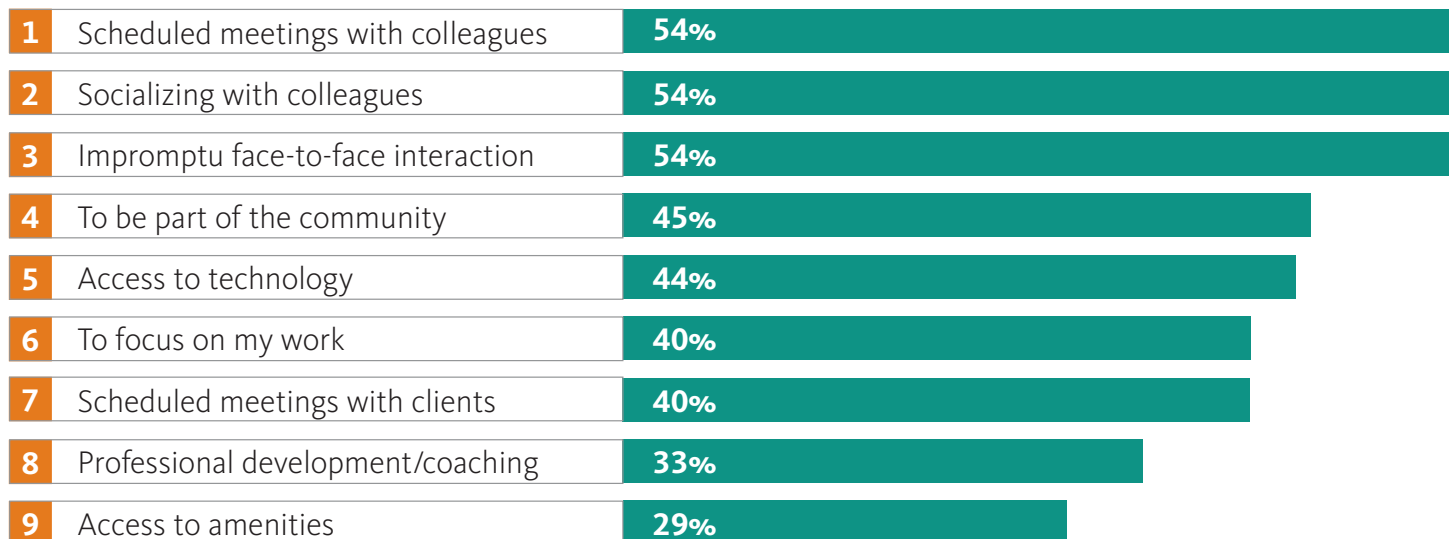
What do people miss from the office? Meeting and connecting with colleagues face-to-face and access to the tools and spaces that support their work.

When employees do come to the office, they expect it to be for collaboration and social connection. Nearly all workers list people-focused reasons as most important for coming into the workplace, with little variation across industries. Despite the rapid adoption of virtual collaboration technologies, people still clearly value face-to-face interactions over virtual ones, in many cases, and miss the company of their coworkers.

When asked what they miss most about working from the office, three out of four survey respondents said “the people”. Workers also report that certain activities, such as collaborating and staying informed about what others are working on, are harder to do at home, underscoring the value of physical presence.

The top reason employees want to come to the office: the people.

Respondents were asked to rank what they believe to be the most important reason(s) for coming into the office.



74%

say the people are what they miss most about the office

55%

say collaborating with others is harder at home

51%

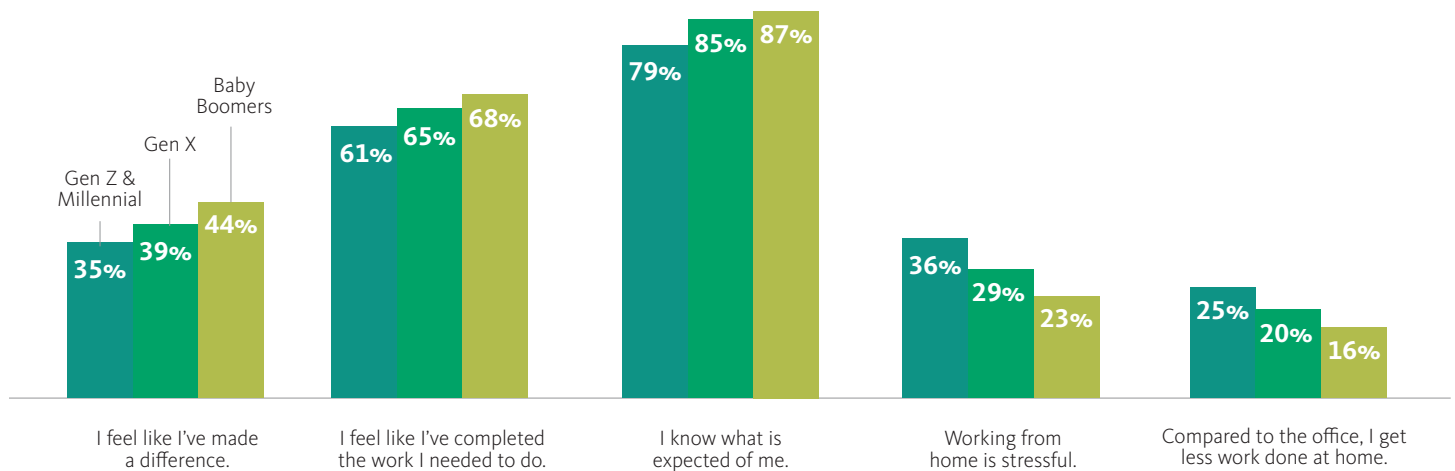
say staying up to date on what others are working on is harder at home

Younger generations are less productive at home and less satisfied with the work-from-home experience.

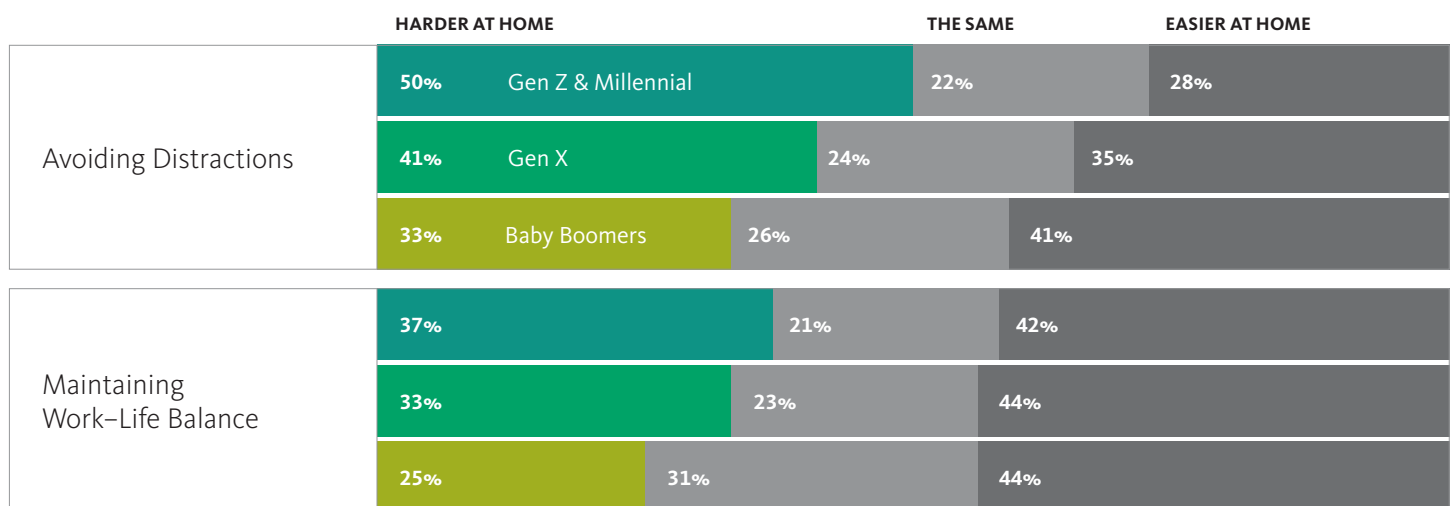
Millennial and Gen Z workers should have had a leg-up in the transition to working from home, as they tend to have more experience working and socializing virtually and are often associated with the work-anywhere lifestyle already on the rise prior to COVID-19. However, younger generations came into this experience having worked from home less often in the past and, overall, with less optimal work-from-home environments.

Despite their technological preparedness for mobile work, younger workers report a far more challenging experience working from home than their older peers. They are less likely to feel accomplished at the end of a typical day. They are less aware of what's expected of them and how their work contributes to organizational goals. And they report struggling most to maintain work-life balance and avoid distractions at home.

Older workers are more likely to feel accomplished at the end of the day; younger workers feel more stressed and report getting less work done.



Millennial and Gen Z workers are finding it harder to avoid distractions and maintain work-life balance than their older peers.



Back to the Office

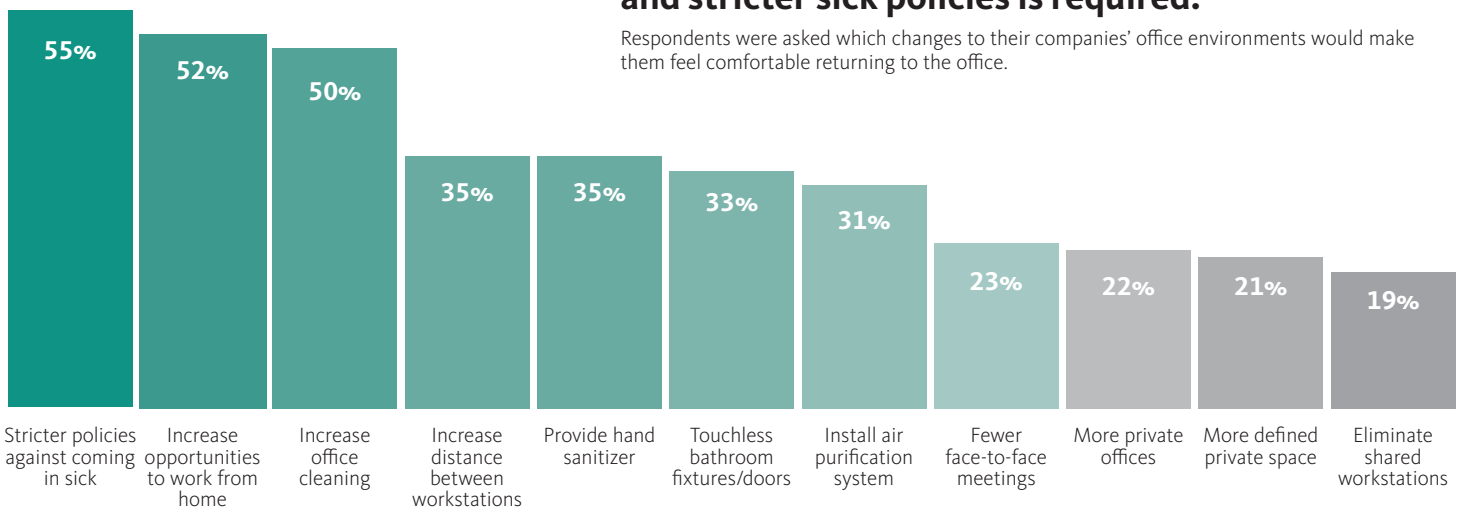
People expect to return to a different workplace: more space, less desk sharing, and increased support for mobile and virtual work.

Workers want their workplaces to adapt to new paradigms—but how workplaces should adapt is still open for debate. The most important workplace changes appear to be policy-based and include stricter policies about staying home when sick and increasing opportunities to work from home. Cleaning and other efforts to establish social distancing rank next.

Broadly, workers are very receptive to a wide swath of both policy and design changes. Not only do workers want their employers to adopt social distancing practices, they are also open to adopting a shift schedule or a wider variety of working hours. While workers expect less sharing of workstations, they feel less positively about reduced investment in shared amenities and are also wary of being discouraged from using public transit.

For people to feel comfortable coming back to the office, a combination of more space, more cleaning, and stricter sick policies is required.

Respondents were asked which changes to their companies' office environments would make them feel comfortable returning to the office.



Increased social distancing and a reduction in shared workspaces are viewed positively by employees.

