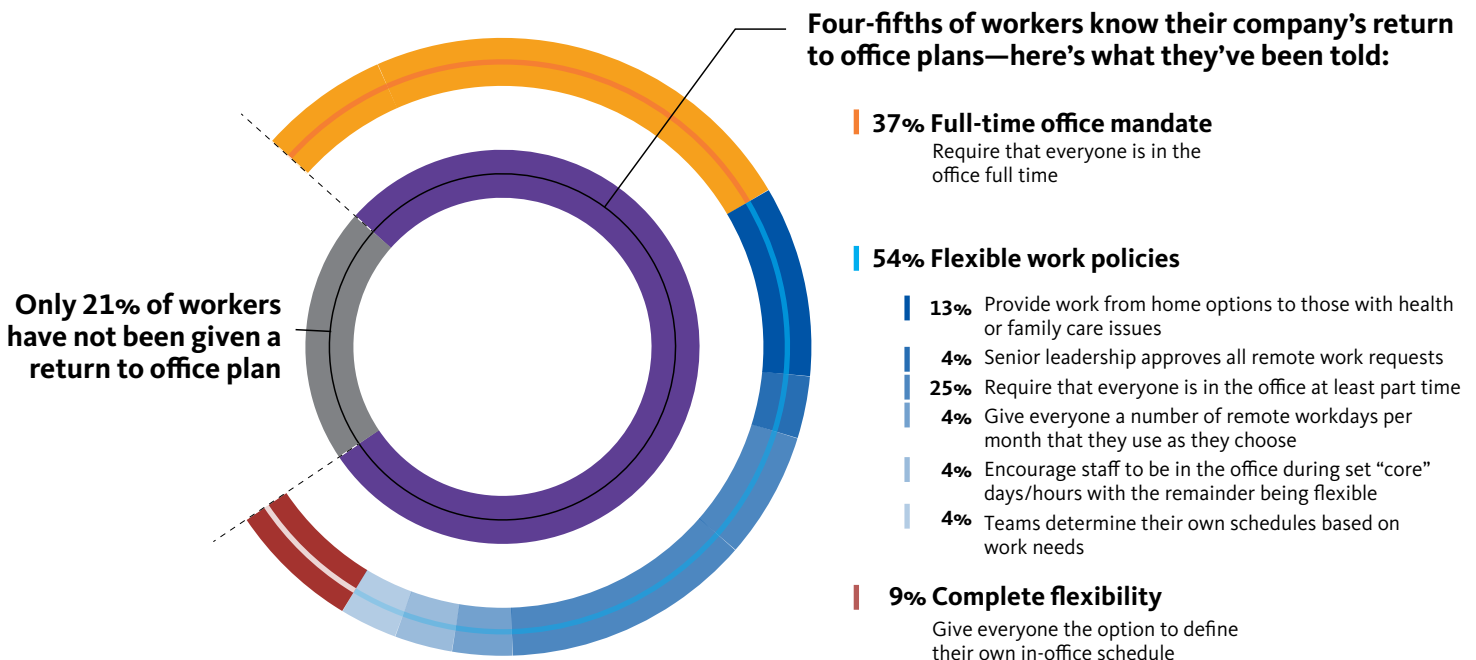


Most companies have announced initial return plans. Two-thirds are flexible policies, but only 9% give workers total control.

Companies have begun the process of bringing workers back to the workplace, kicking off a new period of experimentation and exploration as we collectively create and define the future of work. The majority of companies have now announced at least initial policies and approaches to the return to the office—and the breadth of approaches that are currently being tested is extremely wide, ranging from mandates for full-time returns to allowing employees to fully define the times they are most needed in the office.

As this period of experimentation plays out over the course of 2022 and beyond, understanding the perspectives of both companies and individual workers in relation to hybrid and remote work is crucial. Our data shows that while companies are increasingly making their plans clear, there still exists a gulf between company and individual worker expectations—but also a series of policy and workplace changes that might encourage employees to return to in-person work.



METHODS This report is based of U.S. workers totaling 2,364 respondents, collected from October 6–21 and November 12–14, 2021. The studies were conducted online via an anonymous, panel-based survey. 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 distributed across 10 industries and represent a wide range of seniority levels, roles, ages, and geographies across the U.S.

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The return to the office is just beginning.

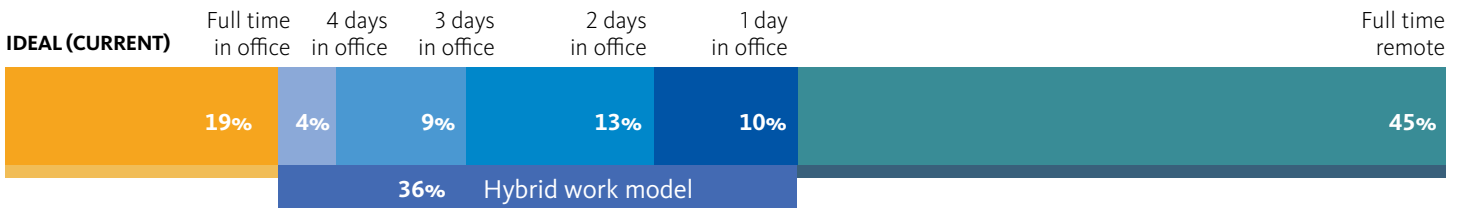
Return to office policies are becoming clear—and most will be asking workers to return to the office more than they currently consider ideal.

As vaccination rates rise but the pandemic continues, neither companies nor the workforce have arrived at a unified approach to the return—or even agreement on what it should look and feel like. Many employees are still reluctant to return to the office—45% say they want to work remotely full time right now. But that number drops to 29% when workers consider how they'd like to work in the future.

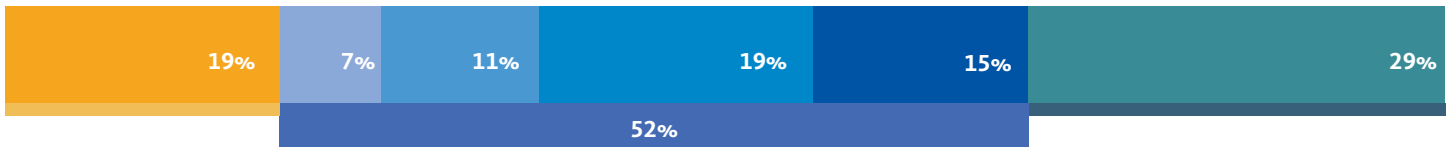
Company expectations also span the gamut, but definitely skew toward a focus on in-person work as they plan for the coming year. Two-thirds of U.S. workers expect that they will be required to work in the office for at least the majority of the week, and for companies that have announced explicit policies, that number rises to three-fourths.

Nearly half of U.S. workers still prefer full-time remote work—but as the pandemic recedes, those numbers will likely fall.

Ideal number of days per week working from the office, currently and post-pandemic (once workplaces and cities are fully reopened).

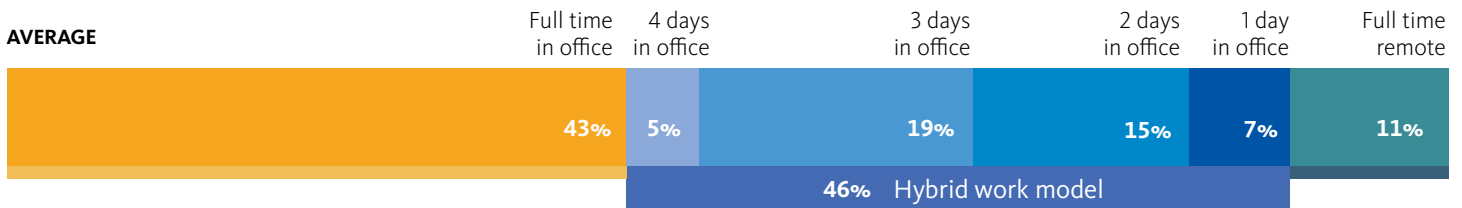


IDEAL (POST-PANDEMIC FUTURE)

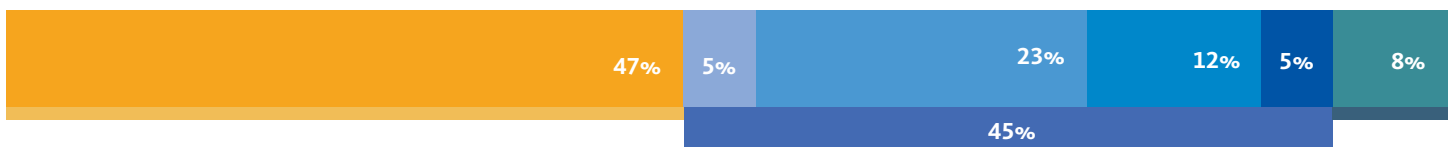


Only 1 in 10 U.S. workers expect their company will allow them to work remotely full time in the future.

Number of days per week that workers expect their company will require them to be in the office.



COMPANIES THAT HAVE ANNOUNCED RETURN TO OFFICE POLICIES



The return to the office is just beginning.

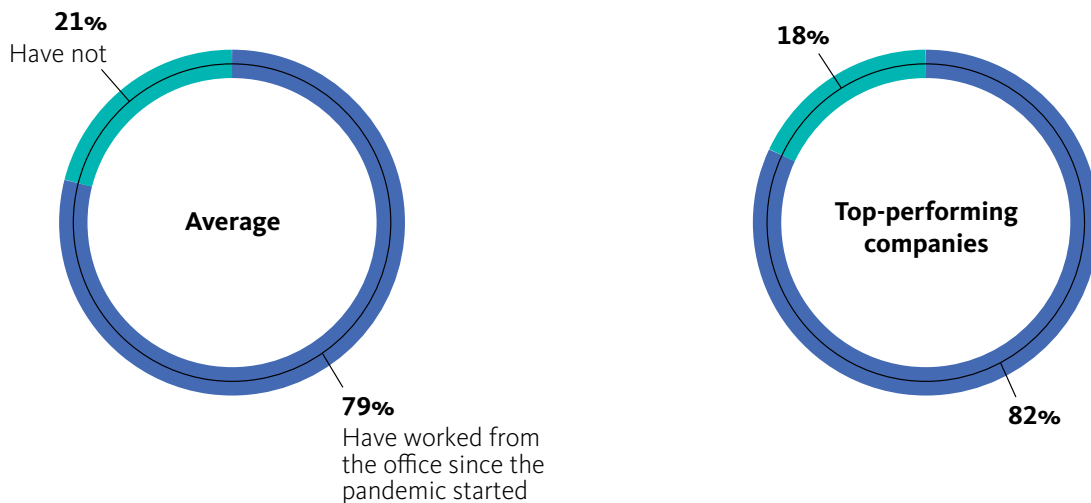
Four out of five office employees have worked from their company's workplace since the start of the pandemic.

Despite continued focus and narrative around remote working, the vast majority of employees have spent some time on-site since the start of the pandemic. And though most workers still have autonomy to choose where they work, many returned to the office to fulfill their job-related needs that the office supports better than the home or non-office locations. The variation in who has returned is telling, however; and may inform change

management and policy approaches moving forward. Professional/technical employees, and employees who began working at their current company during the pandemic, are least likely to have returned at this time. And employees at top-performing companies (defined as companies that have appeared on best places to work, most admired, and most innovative lists) are more likely to have returned.

Employees at top-performing companies are more likely to have worked from their company's offices at some point during the pandemic.

Percent who have worked from their company's office since the pandemic started.



New employees, and professional/technical workers, are least likely to have worked from the office since the beginning of the pandemic.

Percent who have worked from the office since the pandemic started.



The return to the office is just beginning.

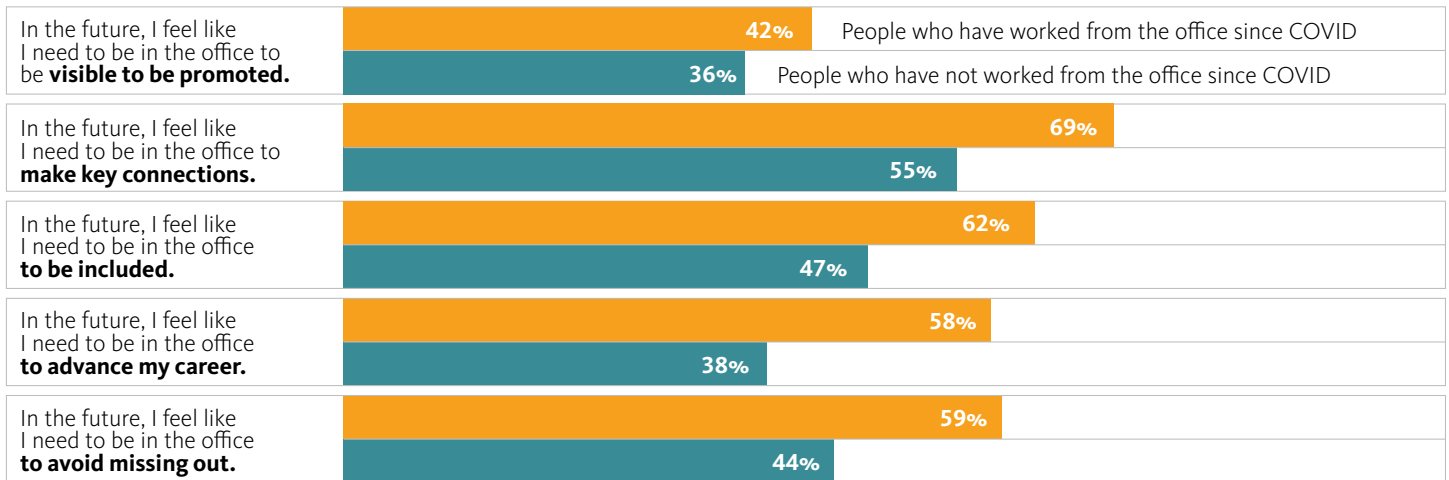
People’s feelings about the office will evolve as they return. There are clear differences in how those who have returned feel vs. those who have not.

Workers are split on whether they need to be in the office to be included, make connections, and be visible to firm leadership—and visiting the office appears to amplify these perceptions. Respondents who have worked from the office since the pandemic started are more likely to believe the office is critical to developing connections, inclusion, and promotion opportunities.

Many have returned to the office because it supports how they work best. Collaboration is listed as the primary purpose of the office, regardless of whether someone has returned to the office or not. But those who have returned are also more likely to say a primary purpose of the office is to provide specific spaces, materials, or resources.

People who have worked in the office during the pandemic see it as more crucial to inclusion and career development—and to avoiding FOMO.

Percent who agree with each statement.



Workers currently using the office rely on it as a place for both collaboration and individual work—and for access to specific spaces.

What workers see as the primary purposes of the office.



The return to the office is just beginning.

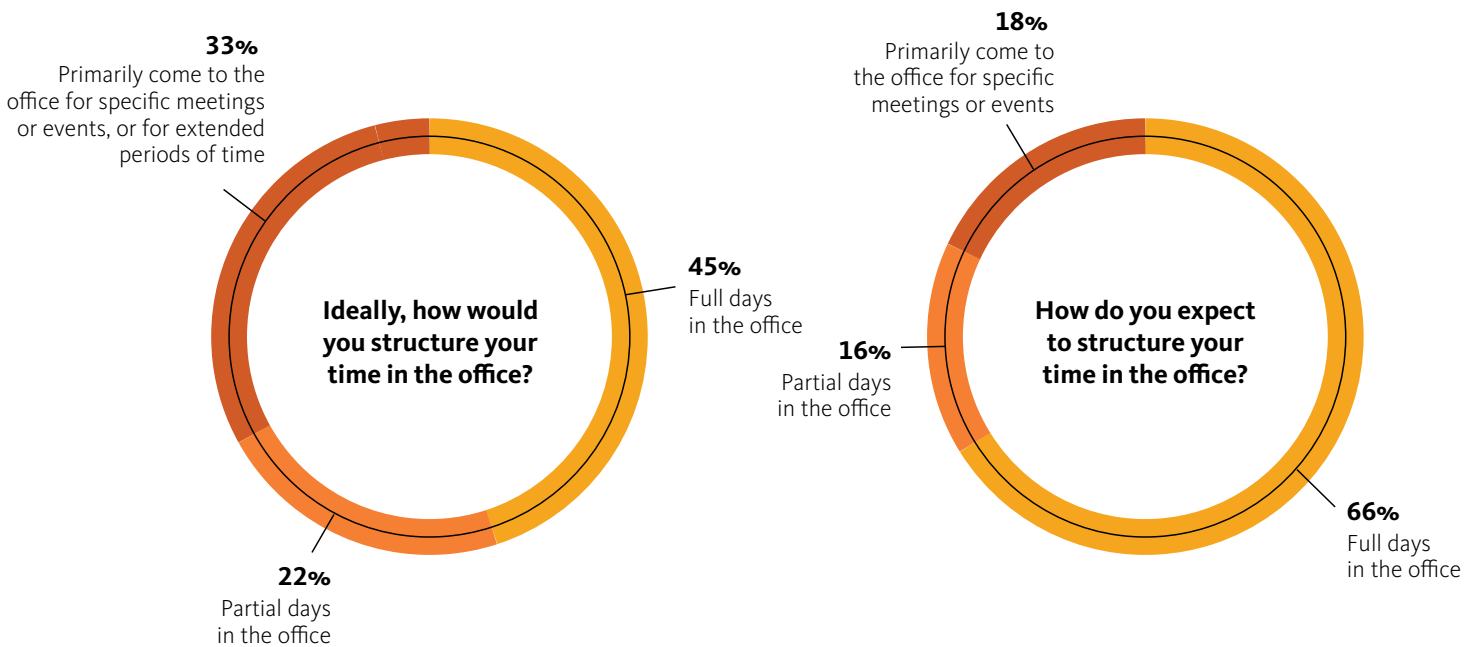
Returning to the office doesn't necessarily mean a return to the 9-to-5 workday—particularly if workers are given autonomy to choose their schedules.

Workers are split on how they want to structure their time at the office. Nearly half of workers would prefer to spend full days in the office, while a significant portion of workers want to spend only partial days, leveraging the workplace for specific tasks. Younger workers are most likely to have variable preferences and interest in a partial-day structure, in line with prior

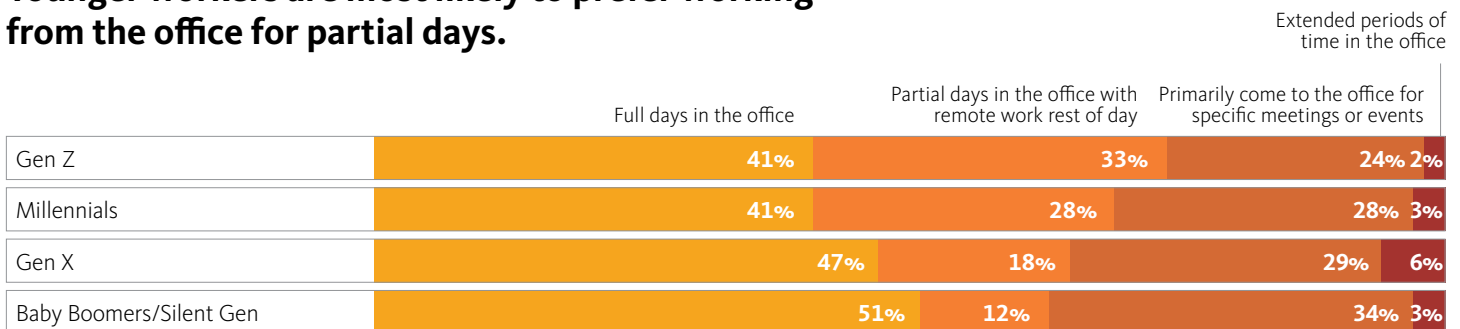
research noting that younger workers are also more interested in flexible, anywhere-work relationships in and out of the office.

Employees do not necessarily expect to be able to implement their ideal, however. Two-thirds of U.S. workers expect to be required to work from the office for full days once they return, and only 16% expect the ability to work partial days.

Over half of workers are interested in working from the office, but for something other than full days. Two-thirds expect to be required to work full days, however.



Younger workers are most likely to prefer working from the office for partial days.



The return to the office is just beginning.

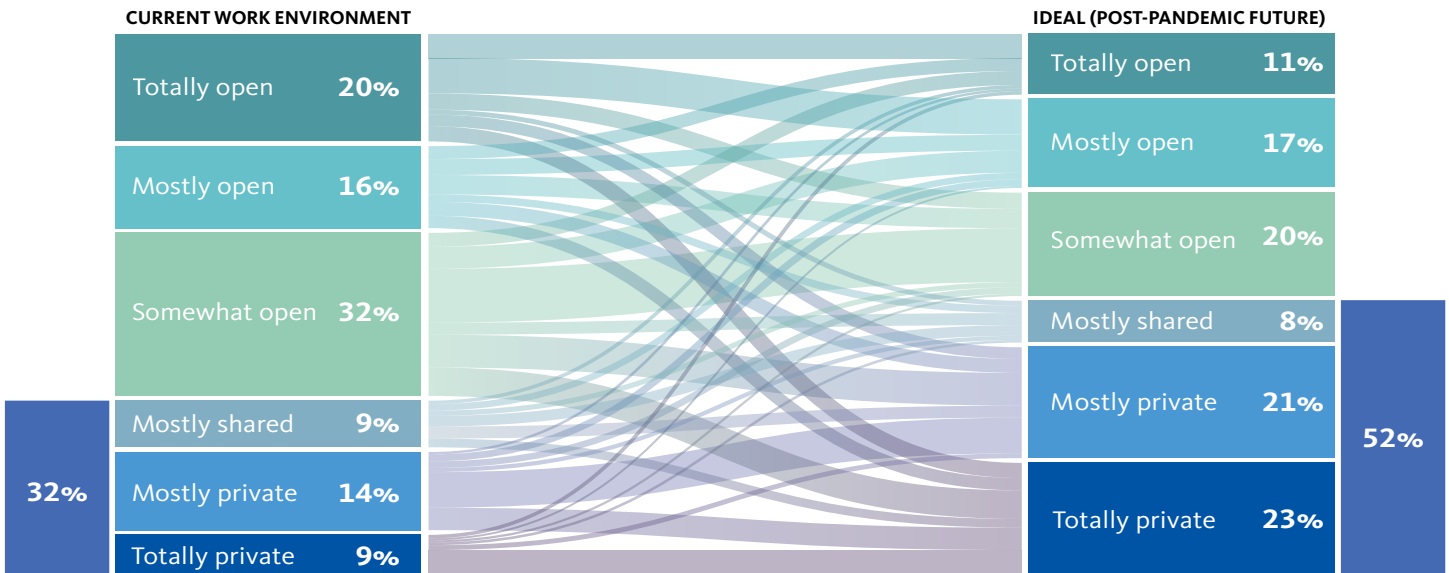
Workers have been asking for more private spaces in the office for years. As they return, that request is becoming an expectation.

Two-thirds of U.S. workers worked in some form of open office environment pre-pandemic—but only half would consider those open environments ideal in the future. This is consistent with pre-pandemic research, but the expectation appears even more acute than before—the ability to find privacy while working remotely is a growing expectation that may be here to stay.

More broadly, many employees clearly expect changes to the work environment as they return—over a third of workers feel their company’s workplace is not prepared for hybrid work, and when asked what would make them more comfortable returning, access to private spaces is ranked by three-fourths of workers, outranked only by enhanced air filtration and cleaning protocols.

Post-pandemic, employees are seeking more private environments.

Current breakdown of work environments compared to workers’ ideal environment post-pandemic.



After COVID safety measures, privacy is most important to returning employees.

Percent of employees who have not yet returned who would be more comfortable returning if each item were implemented.

