

WORKFORCE SENTIMENT SURVEY

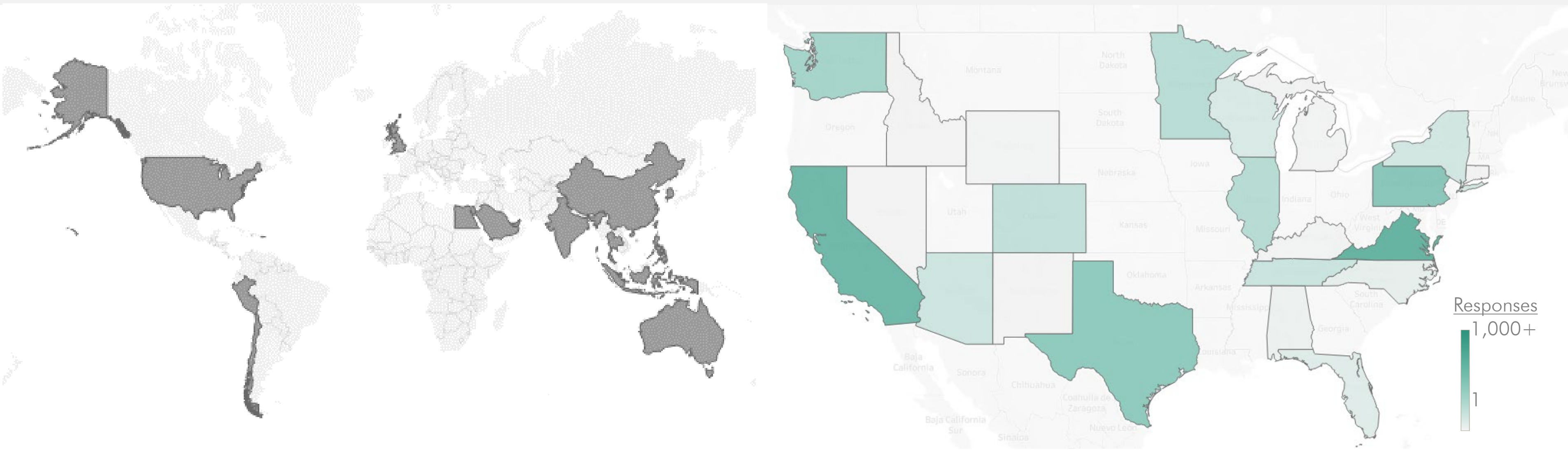
Benchmark Report

CBRE

WORKFORCE SENTIMENT SURVEY

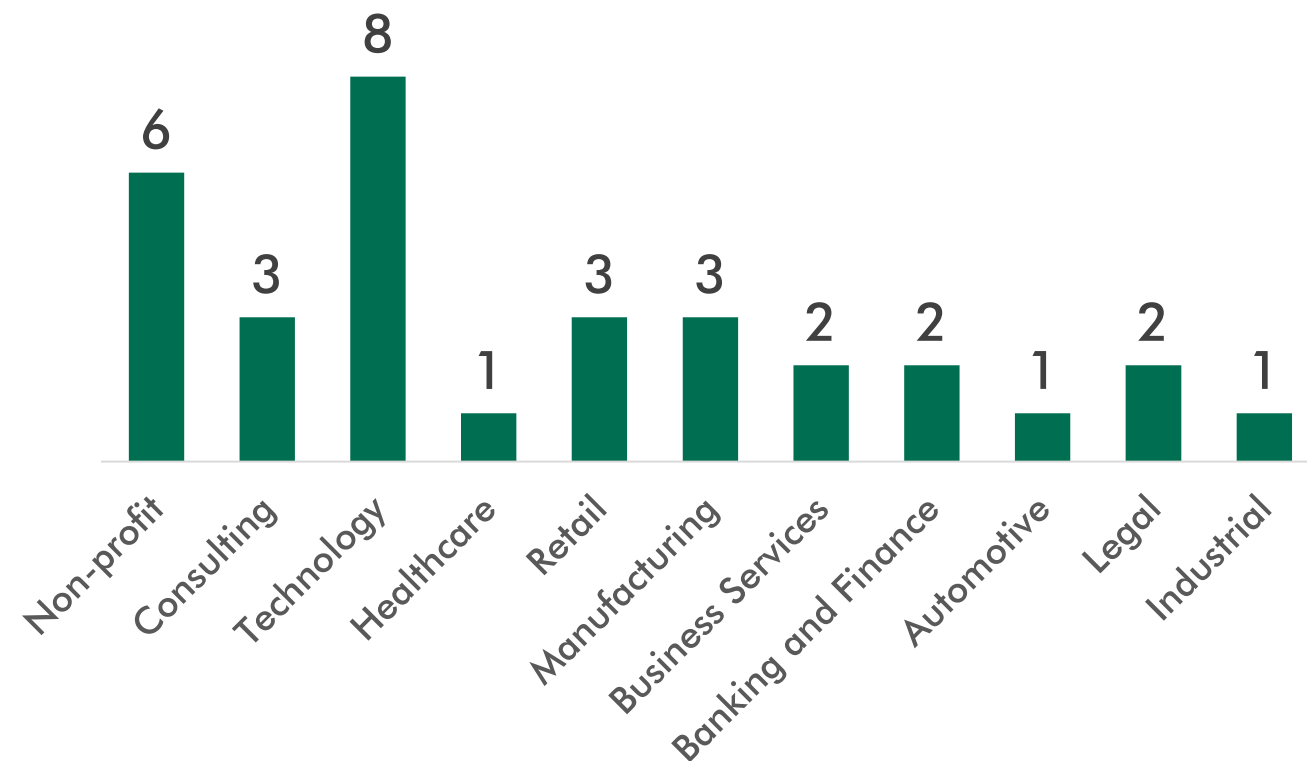
32 Companies | 10k Responses | 18 Countries

Conducted 6/16/2020 – 8/7/2020

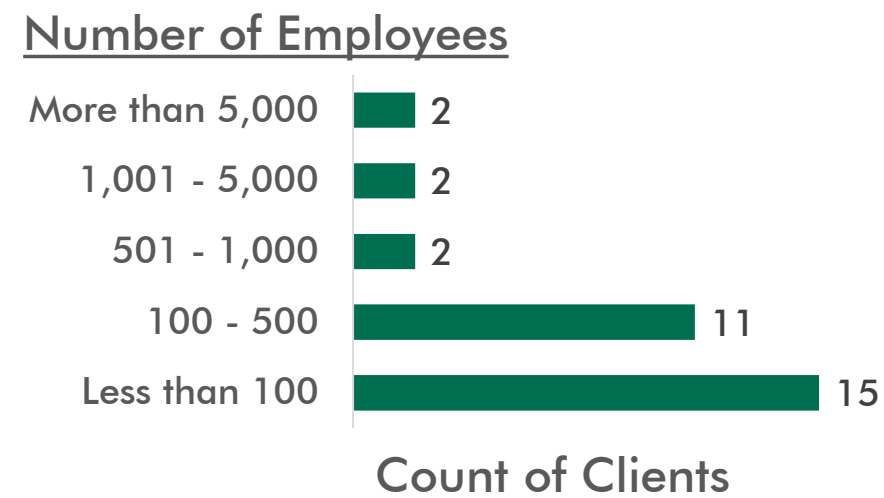


Respondent Demographics

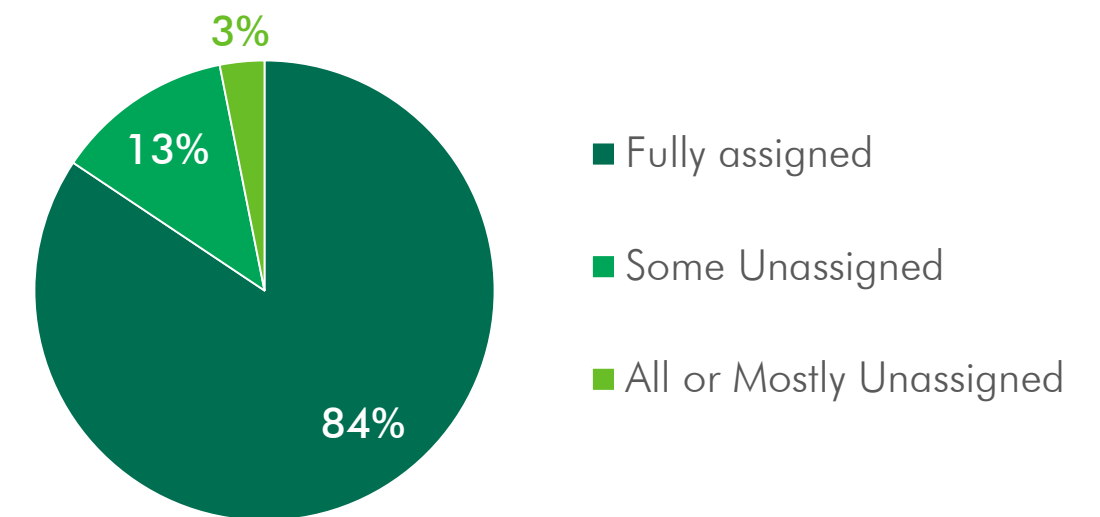
Clients by Industry



Clients by Size

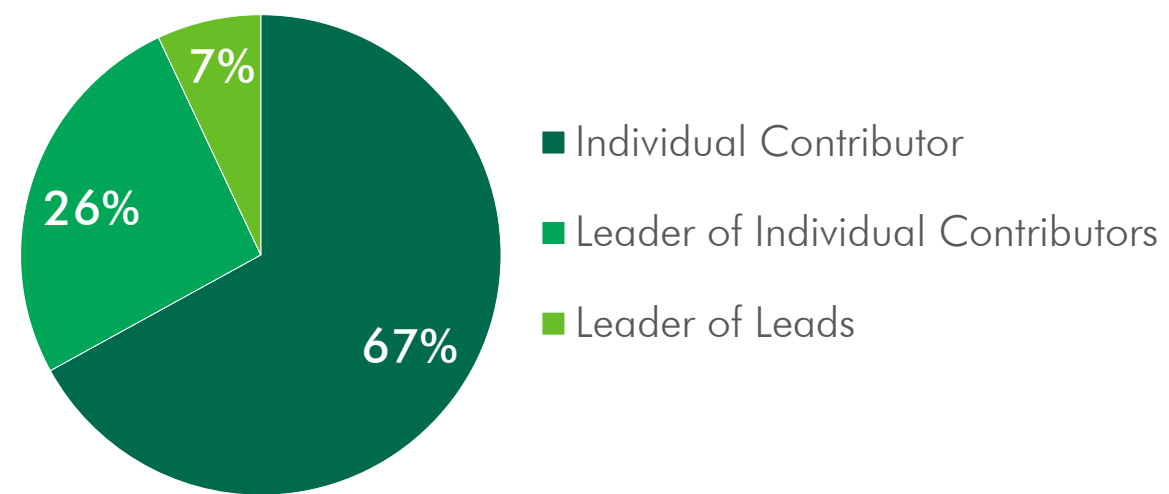


Occupancy

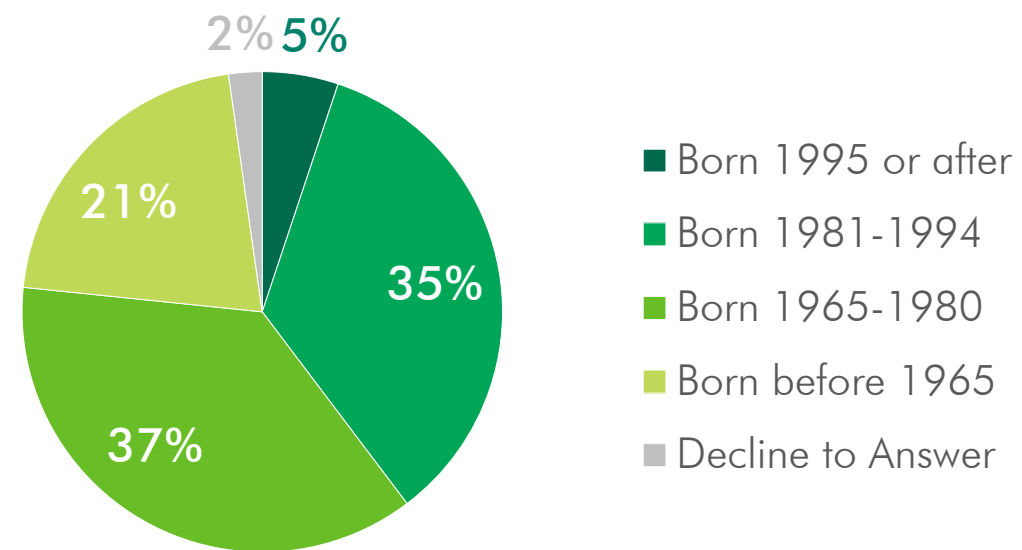


Respondent Demographics

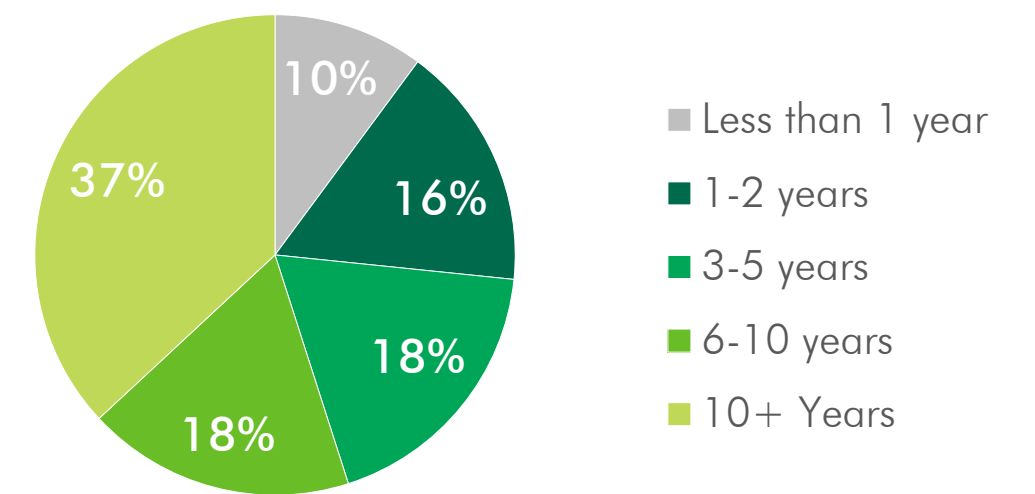
Role



Generation



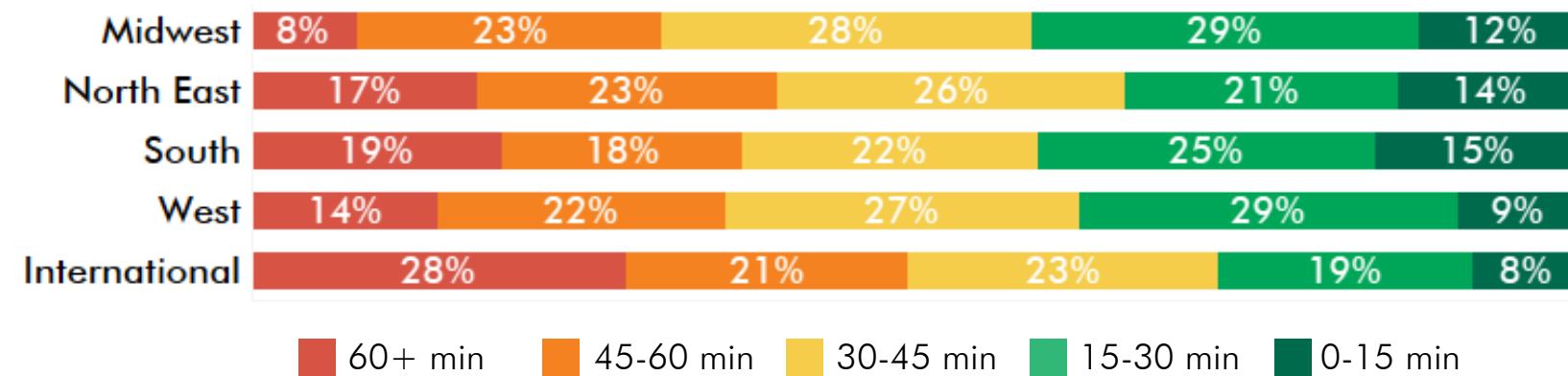
Tenure



Respondent Demographics

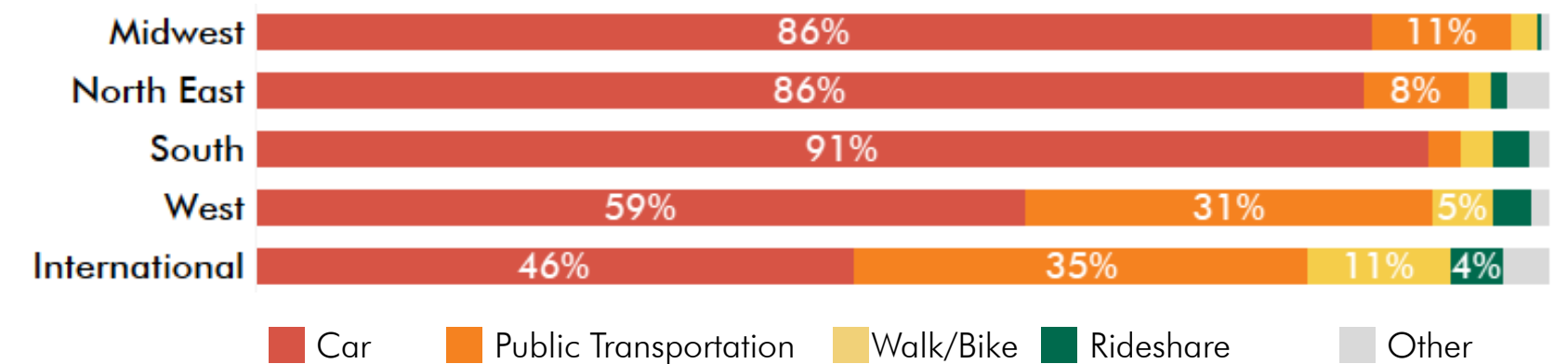
Commute Length

How long is your typical one-way commute?



Commute Mode

How long is your typical one-way commute?

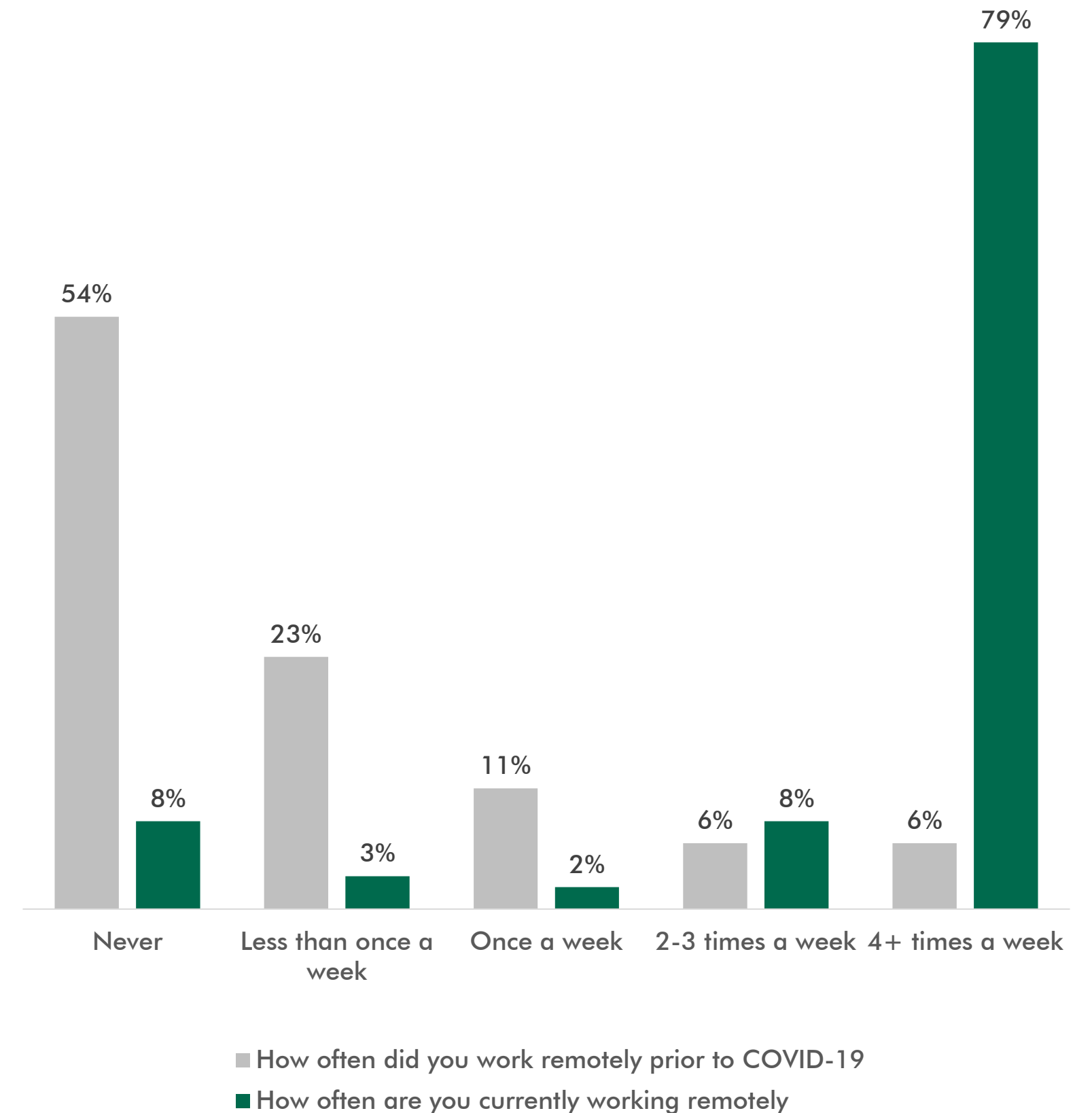


State of Work

We are working remotely more than ever before.

Though only half of respondents had experienced working from home prior to COVID-19, now nearly 4 out of 5 employees are working from home full time. While many companies wouldn't have been able to imagine this at the start of 2020, most companies have adjusted, adapted, and evolved to continue their daily operations from a variety of settings. That being said, the responses from this survey are reflective of a moment in time and will likely continue to evolve as time goes on.

Past and Current Remote Work



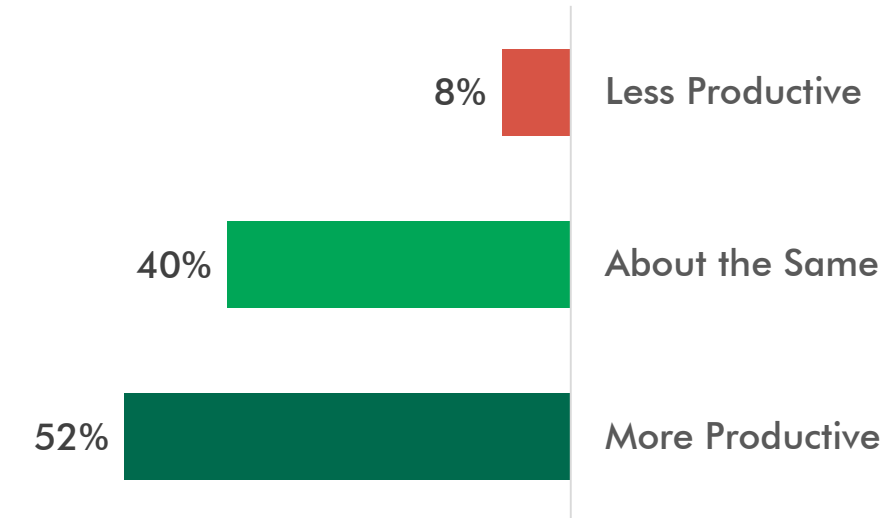
Productivity

Remote work looks and feels productive to most.

While it's difficult to quantify ambiguous measures like productivity and effectiveness, we can start by comparing employees' perception to leaders' observations. Bridging the gap between these perspectives lets us see that working remotely has had little perceived negative impact on productivity and manager effectiveness. In fact, many are reporting increased productivity which can be tied to increased engagement and overall satisfaction.

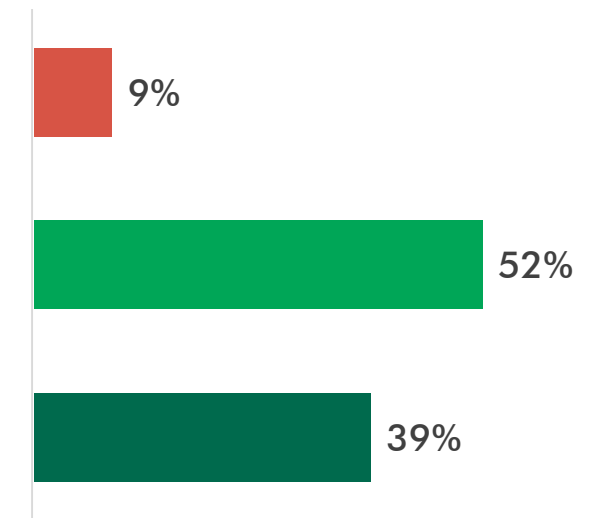
Individual contributors say...

How productive do **you** feel when working remotely?

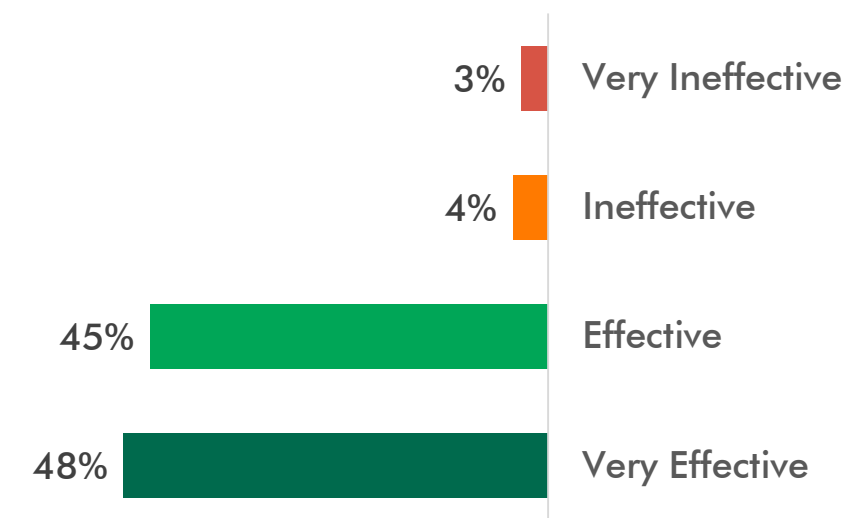


Leaders say...

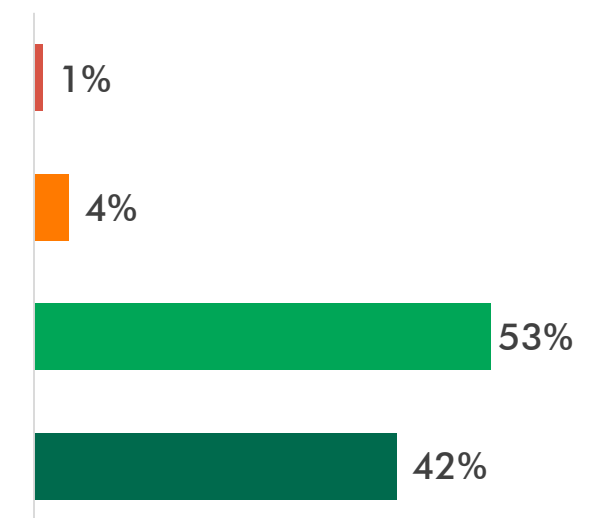
How productive do you think **your team(s)** have been while working remotely?



How effective is **your manager** in managing a remote team?



How effective do **you** feel you are at managing your remote team(s)?

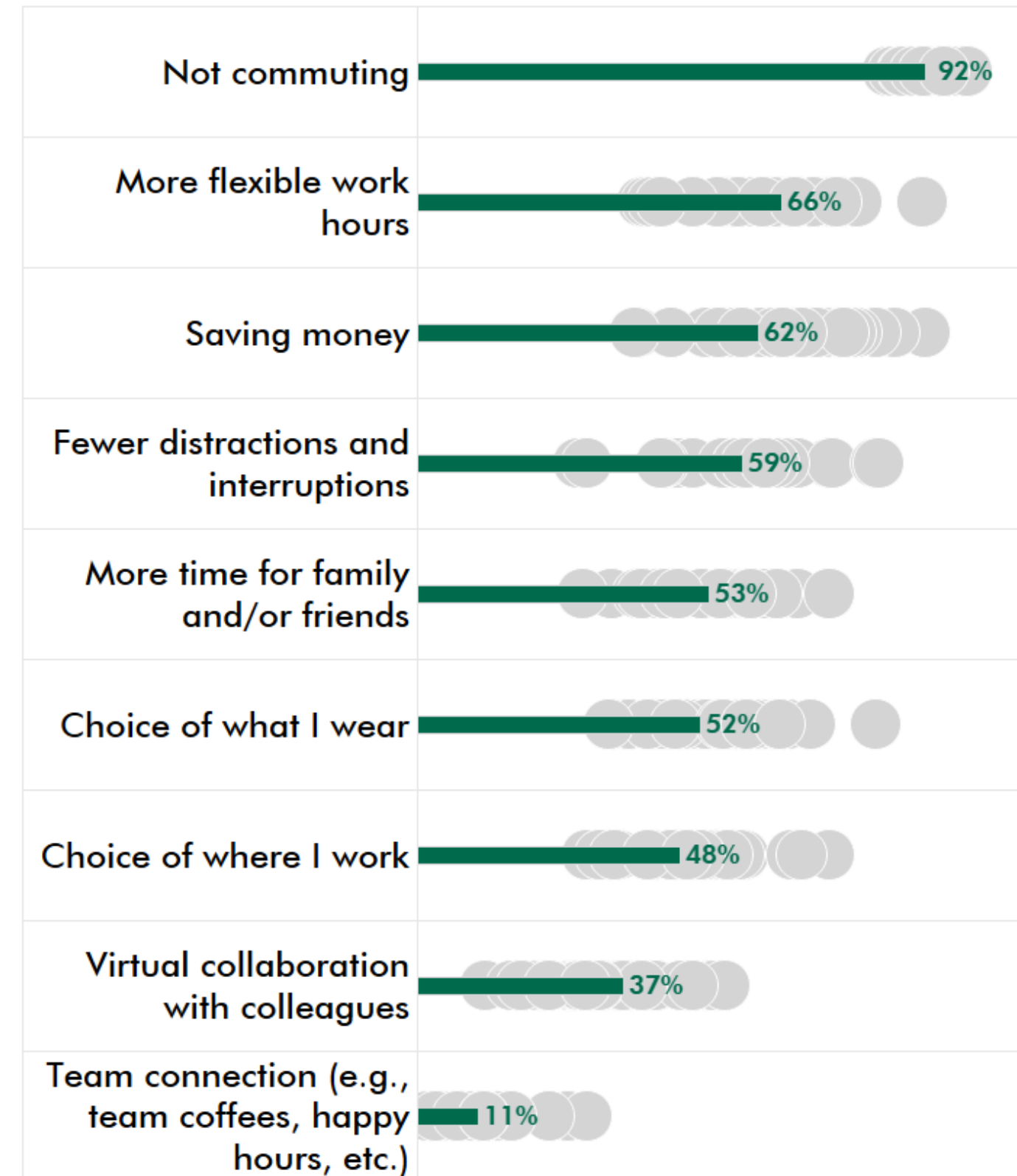


Benefits

Employees enjoy greater choice and autonomy.

From where and when work gets done, to how time is spent when not working, remote work empowers employees to have more autonomy over their day. Commuting is an unrecognized sacrifice – time that is neither on-the-clock nor spent freely. Without commute dictating a start and stop time for work, employees can discover their more natural workflows, patterns, and preferences, as well as enjoy the “bonus” time in their day not spent on the road.

Biggest Benefits of Remote Work



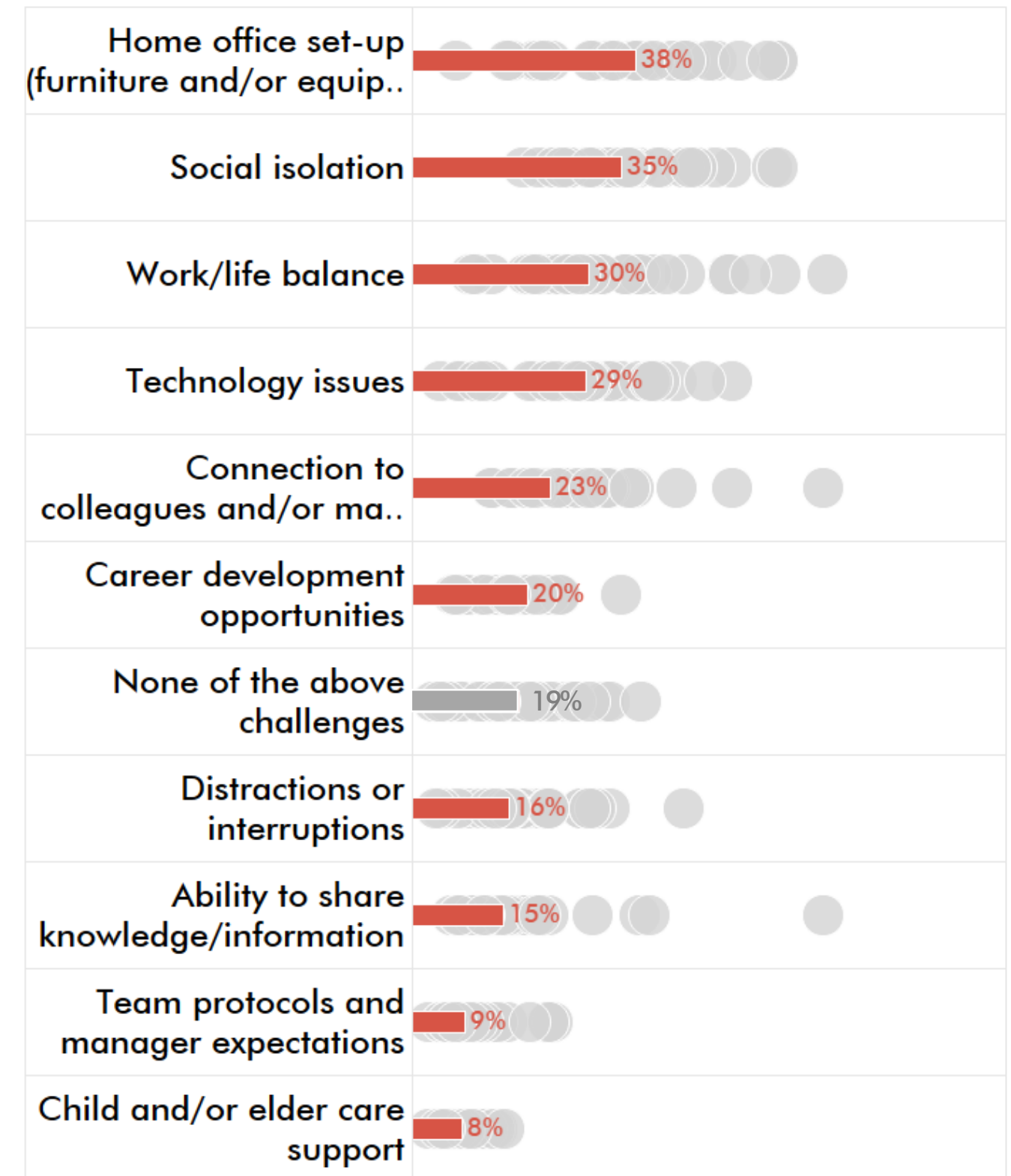
● Unique Client ■ Average

Challenges

We are working remotely more than ever.

There will always be challenges to working in any environment, whether in the office or remote. As this survey was conducted in the first months of remote work for many employees, it is likely that sentiments will continue to change. In time, new tools, technologies, and most importantly behaviors and norms will emerge to lessen the burden of some of these challenges.

Biggest Challenges of Remote Work



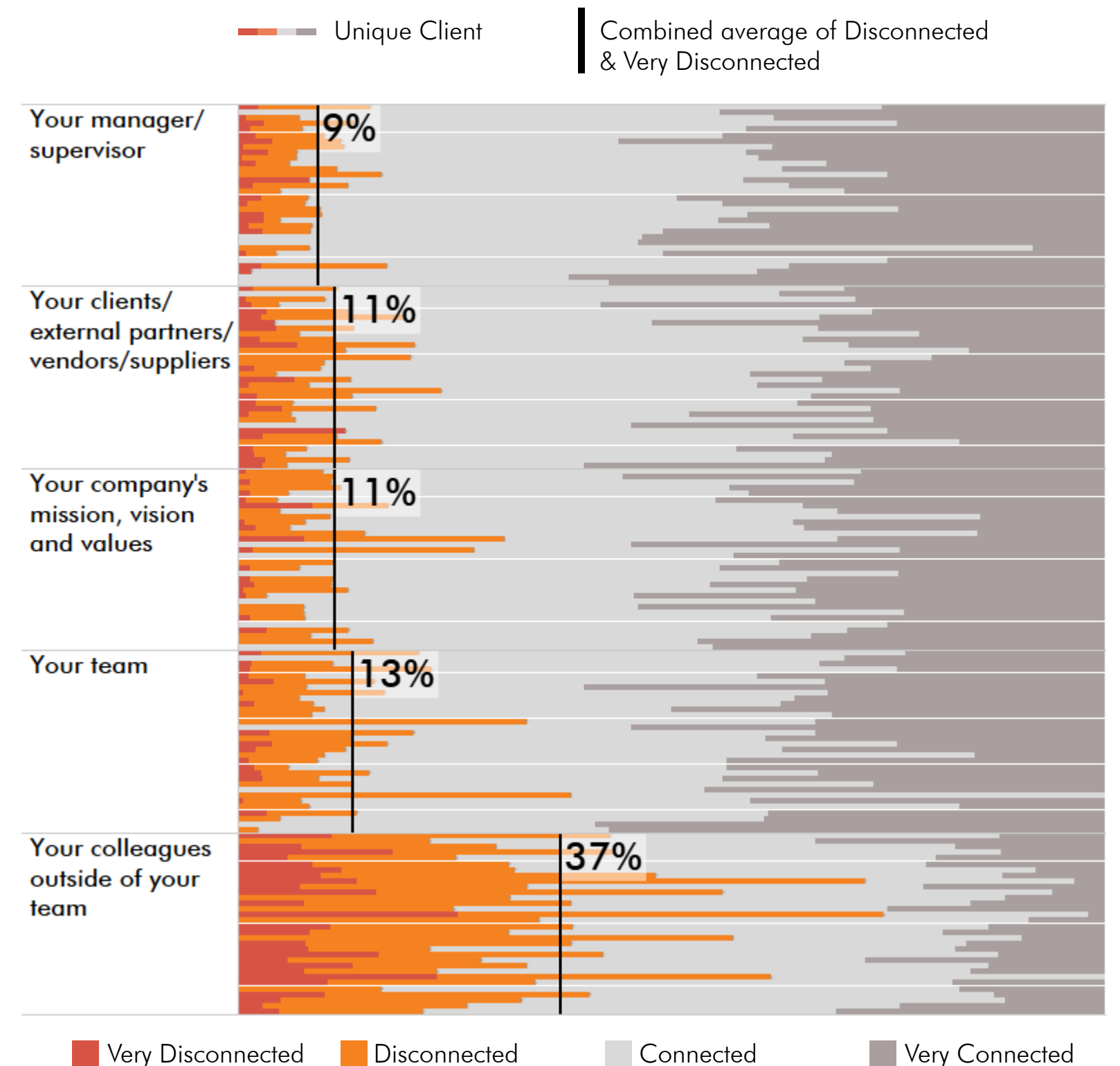
● Unique Client ■ Average

Connection

We've lost the water cooler.

Fortunately, between instant messaging, video conferencing, and good old-fashioned phone calls, today's technology has enabled many to maintain connections with their teams, managers, and partners. What's more difficult is maintaining work relationships that aren't always driven by essential work. Casual connections with extended colleagues may be less necessary for day-to-day tasks, but they boost culture and morale. While we can't recreate the spontaneity of the water cooler, through conscious effort we can begin to better foster these relationships virtually.

When working remotely, how connected do you feel to...



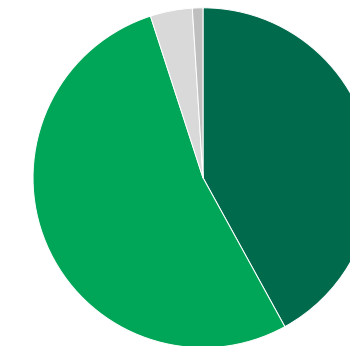
Managing

It's harder to share experiences.

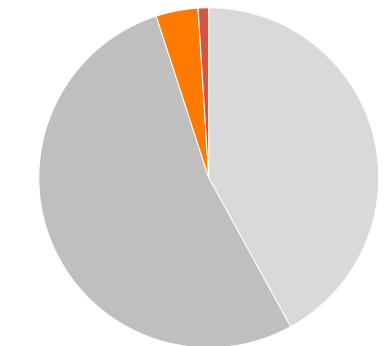
Team culture is often driven by sharing experiences which unfortunately are difficult to build over video conferences and phone calls. While most are all sharing the experience of remote work in general, it feels like no number of virtual coffee chats or digital happy hours will replace face-to-face connections. As we begin to repopulate offices, these challenges can be mitigated by intentional and deliberate in-person team time.

Challenges Managing Remote Teams

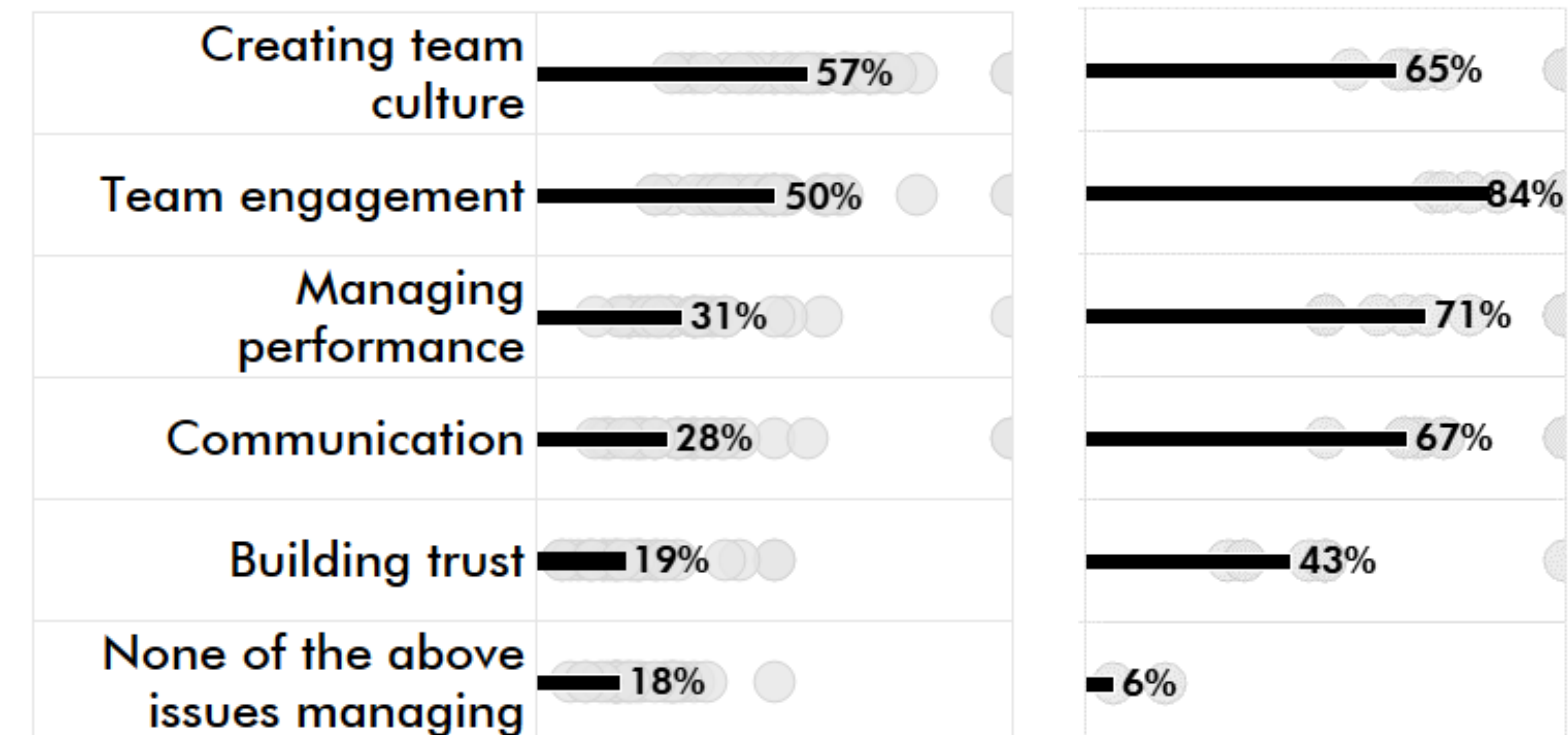
How effectively are you able to manage/lead your remote team(s)?



For the 95% who feel they can manage **effectively** or **very effectively**.....



For the 5% who they can manage **ineffectively** or **very ineffectively**...



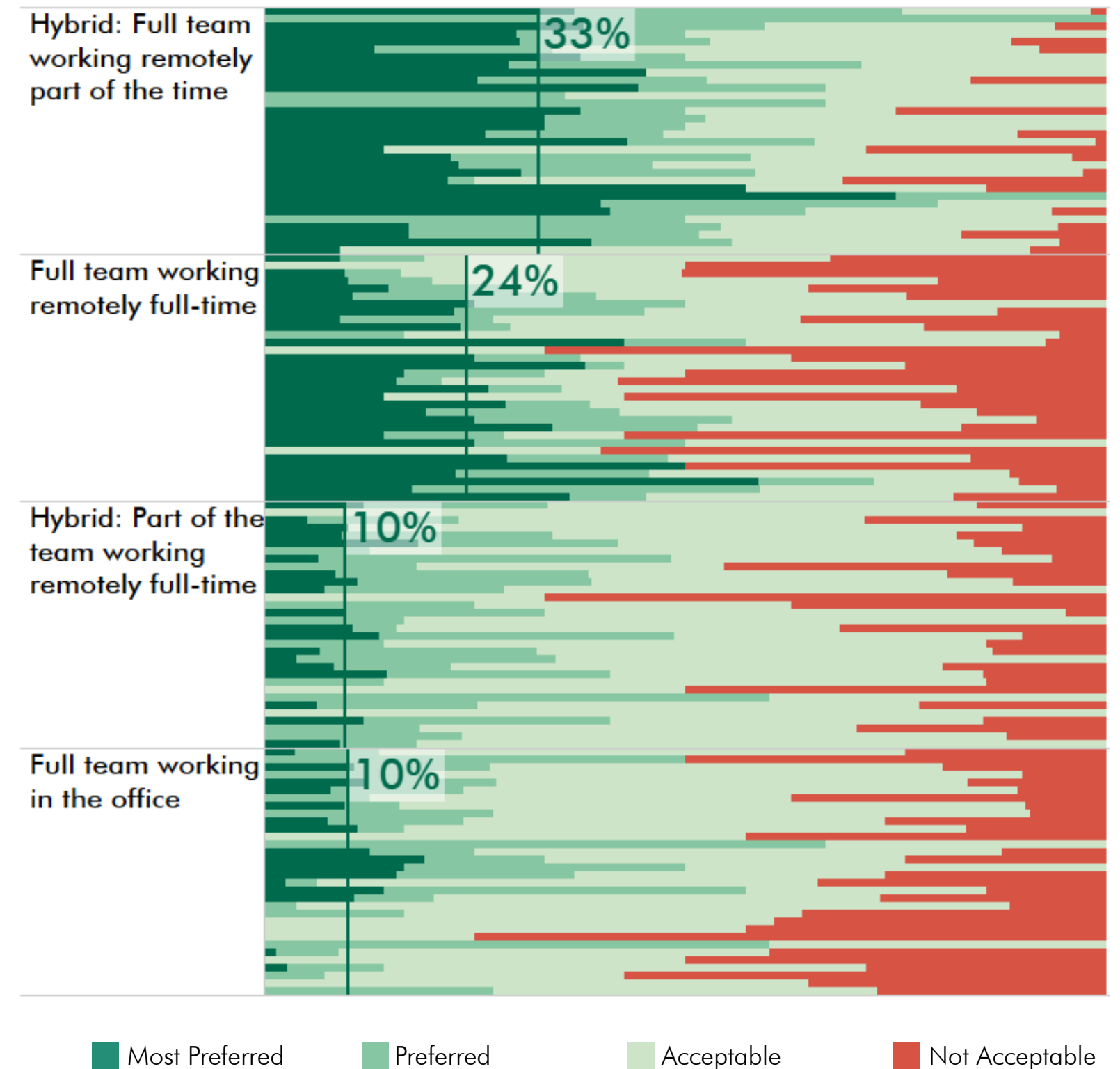
● Unique Client ■ Average

Dynamics

There is no one-size-fits-all for remote policies.

Most leaders recognize that having a full team in the office every day will be a relic of the past, and that having part-time remote work is the way of the future. Whether it's in-office team days, "WFH Wednesdays," or a more fluid arrangement, teams will likely straddle multiple environments from now on. Approaches to remote work can vary by company, department, and leader, which is why it's important for companies to create structured but flexible remote work policies.

Manager Preference on Remote Team Dynamics

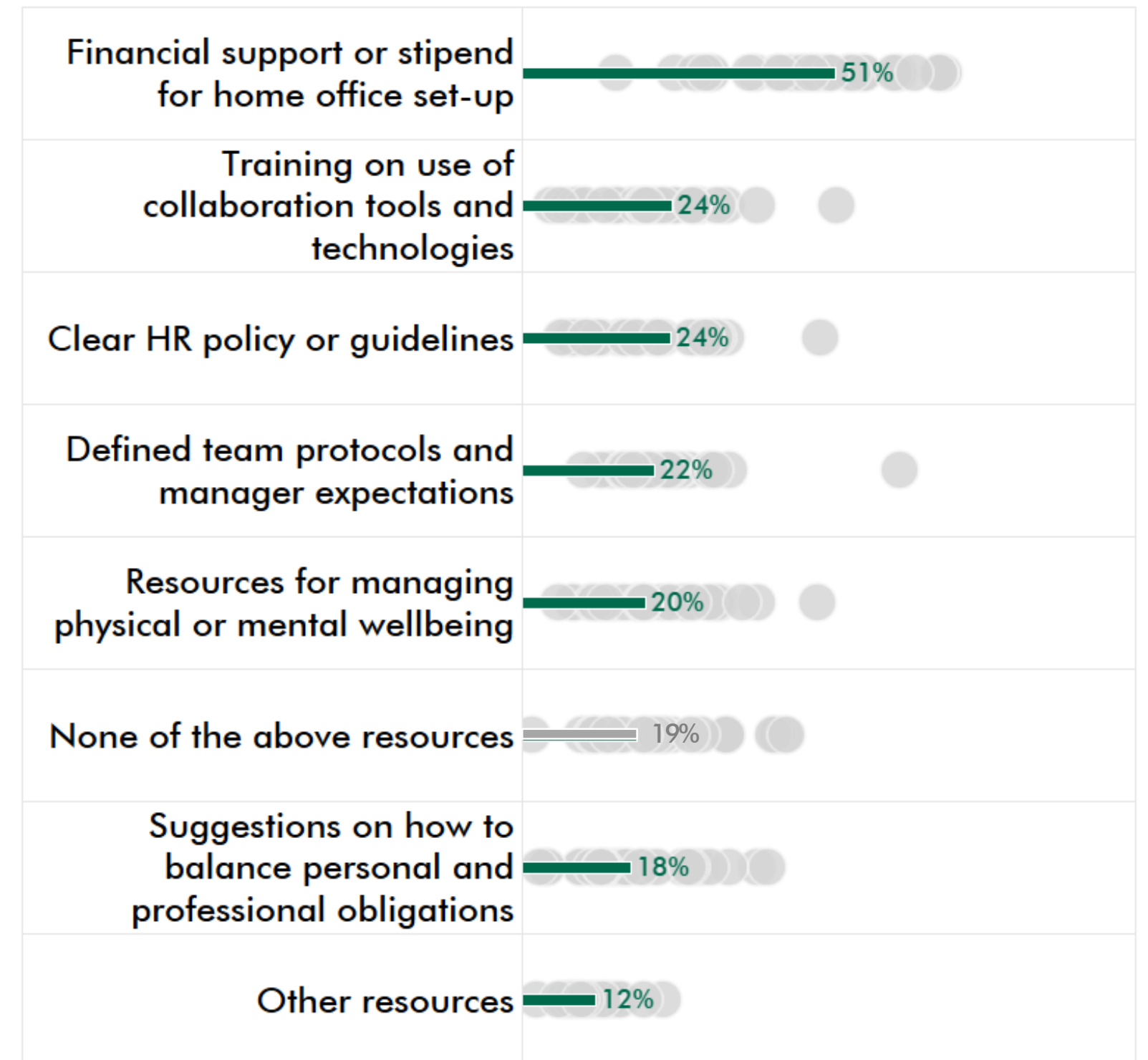


Support

Provide resources for the whole employee.

From monitors that can boost focus to ergonomic furniture that supports physical well being, having a proper home office set-up helps employees feel more productive, engaged, and valued. This in conjunction with comprehensive training, guidelines, and policies will help employees know what's available to them and expected while working remotely.

To improve the remote experience, employees want...



● Unique Client ■ Average

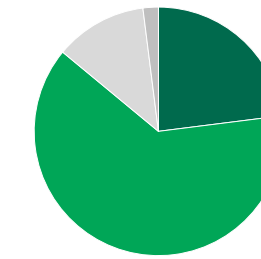
Back When

The office wasn't perfect either.

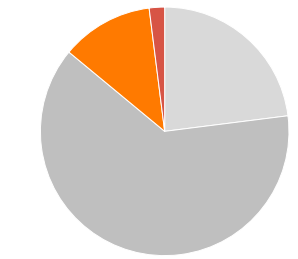
While nearly all employees felt burdened by their commute, those who disliked the office found distractions and interruptions to be particularly challenging and may be finding solace in their ability to focus remotely. One-third of respondents found work/life balance to be a challenge while working remotely (pg. 9), but it's worth noting that this challenge was felt even by even more respondents while in the office.

Biggest in-office challenges

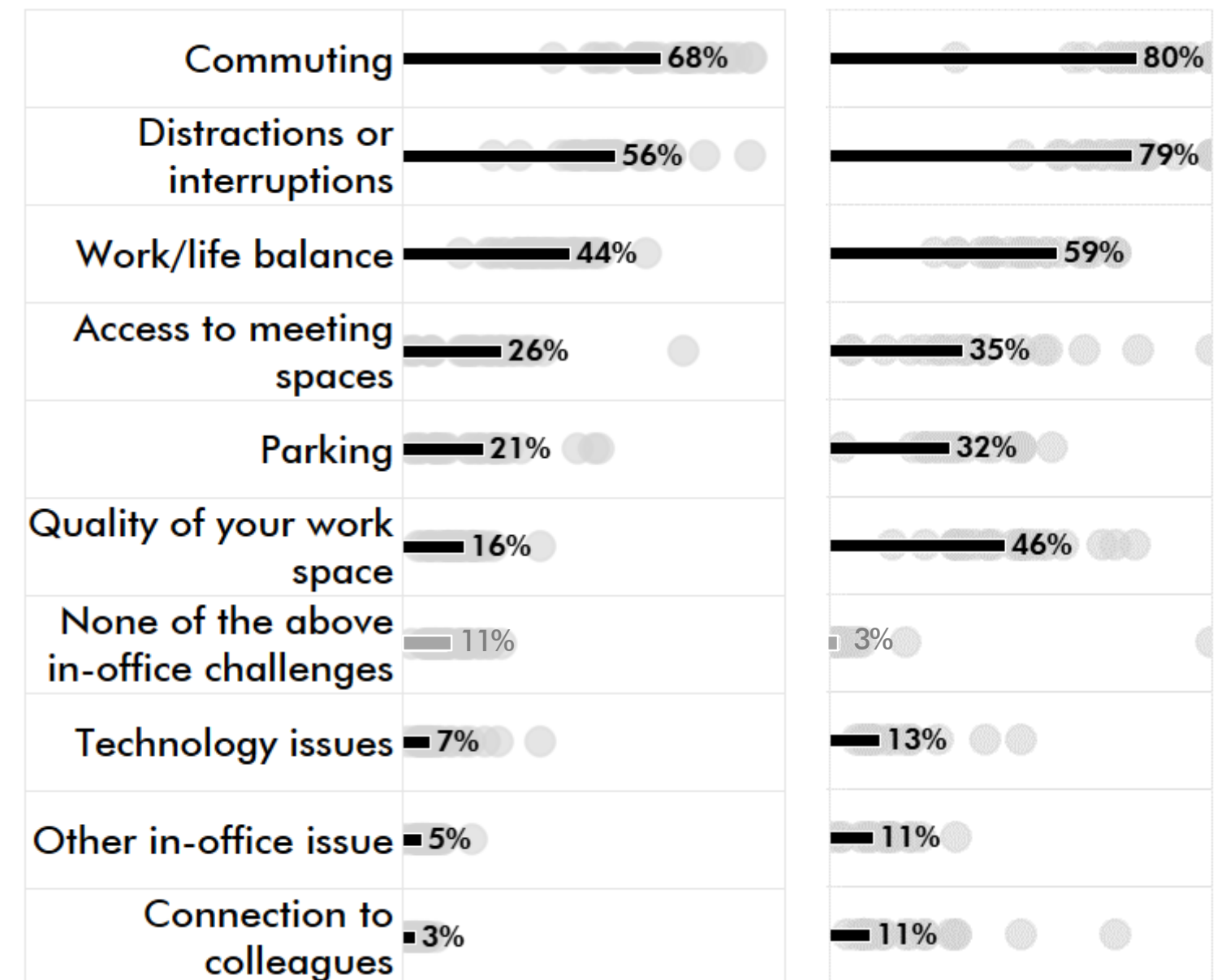
Prior to COVID-19, how much did you enjoy working in your office?



For the 86% who enjoyed or very much enjoyed the office...



For the 14% who disliked or very much disliked the office...



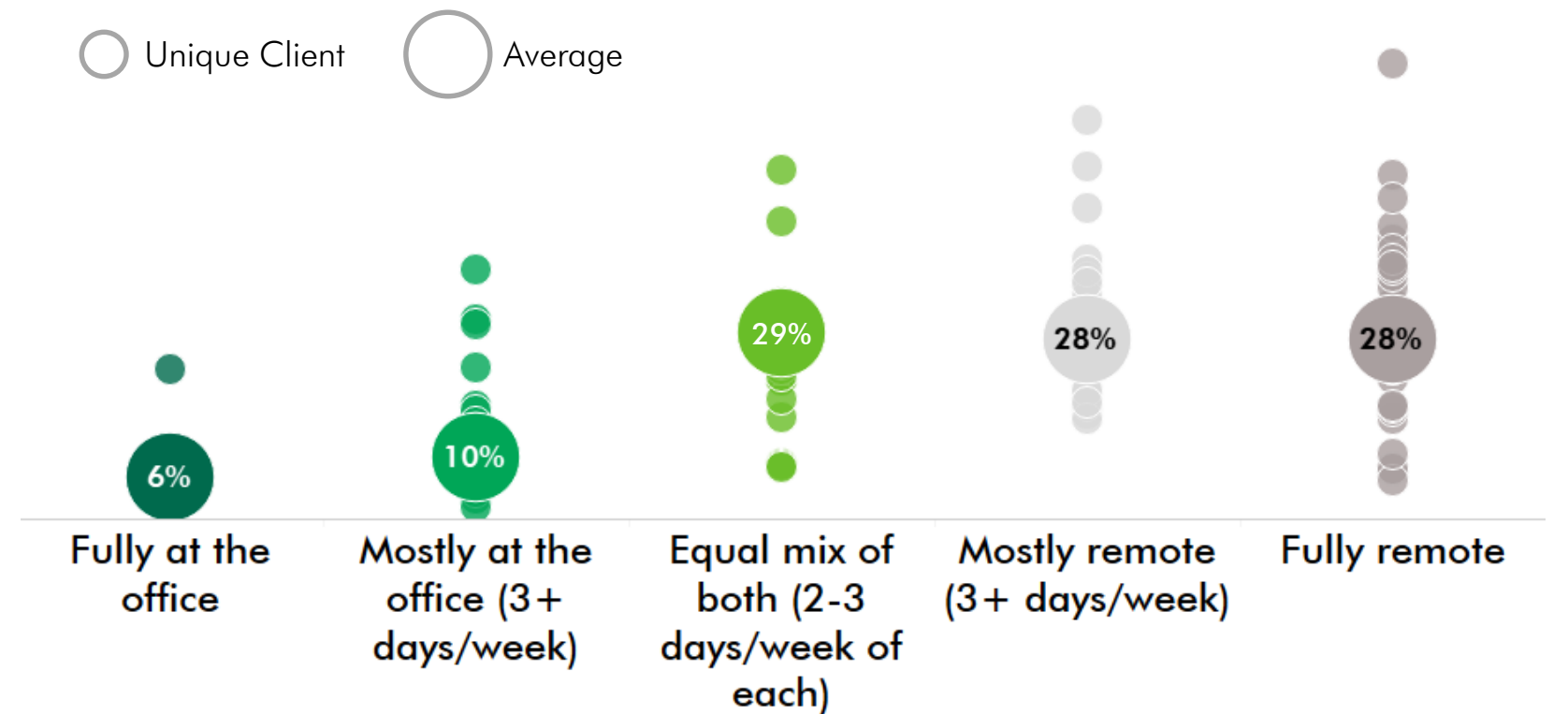
● Unique Client ■ Average

Remote 2.0

Remote work is here to stay.

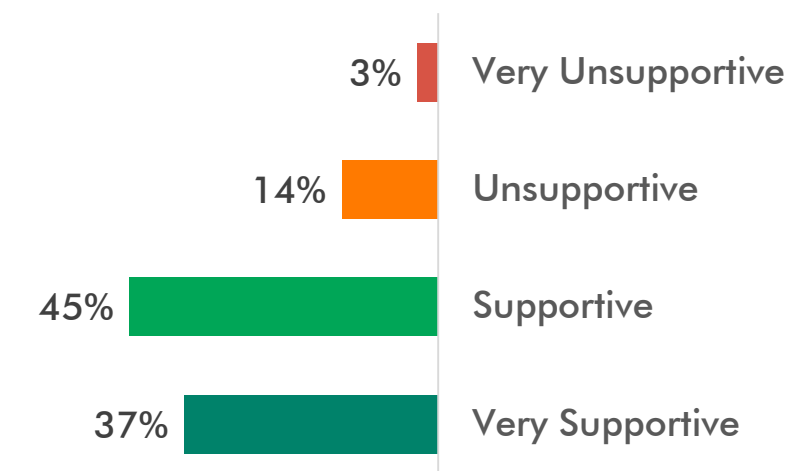
As we look beyond the pandemic, the appetite for remote work has certainly increased. Current employees, and future talent, will continue to expect more flexibility in how and when their work gets done. Fortunately, most leaders recognize this shift and are supportive of some form of continued remote work in the future.

Desire for Continued Flexibility



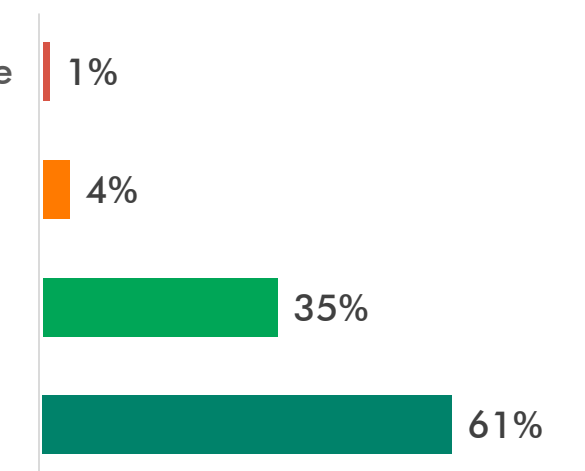
In a post-COVID world, how supportive do you think **your leadership** will be of remote working?

Individual contributors think...



How supportive would **you** be if your team(s) indicated a desire to work remotely more often in the future?

Leaders say...



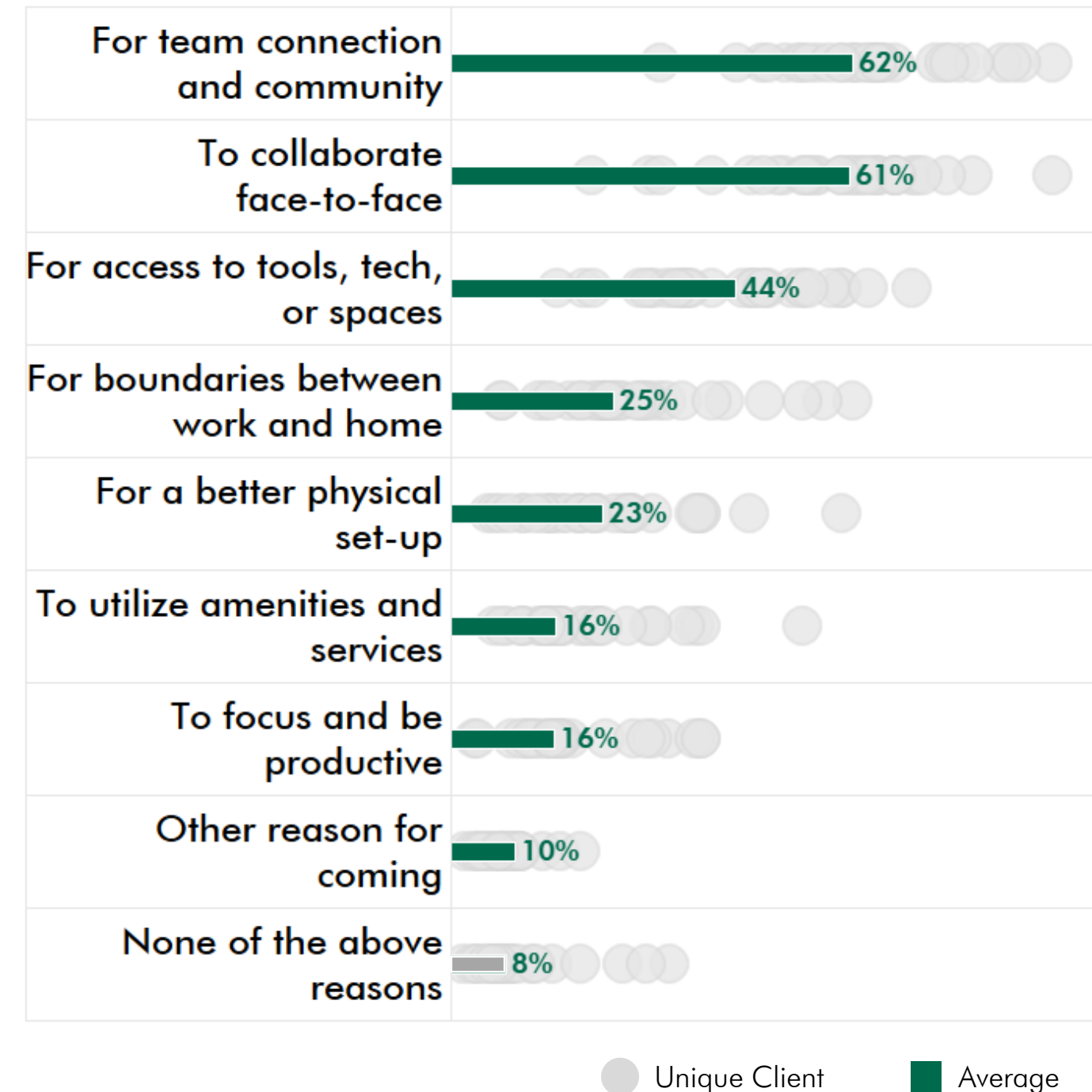
Office 2.0

The office is here to stay, too.

The increase of remote work will certainly have an impact on office utilization, but it will not mean the impending “death” of the office, rather a rebirth. The office of the future may be modified to support impromptu collaboration, creative ideation, and social connections that are best served in person. It may become a communal hub for training, seminars, and career development. It may become something different still. Regardless, these changes should be driven by your people, your culture, and your vision, not this pandemic.

Purpose of the Office

In a post-COVID world, what are the primary reasons you would come to the office?



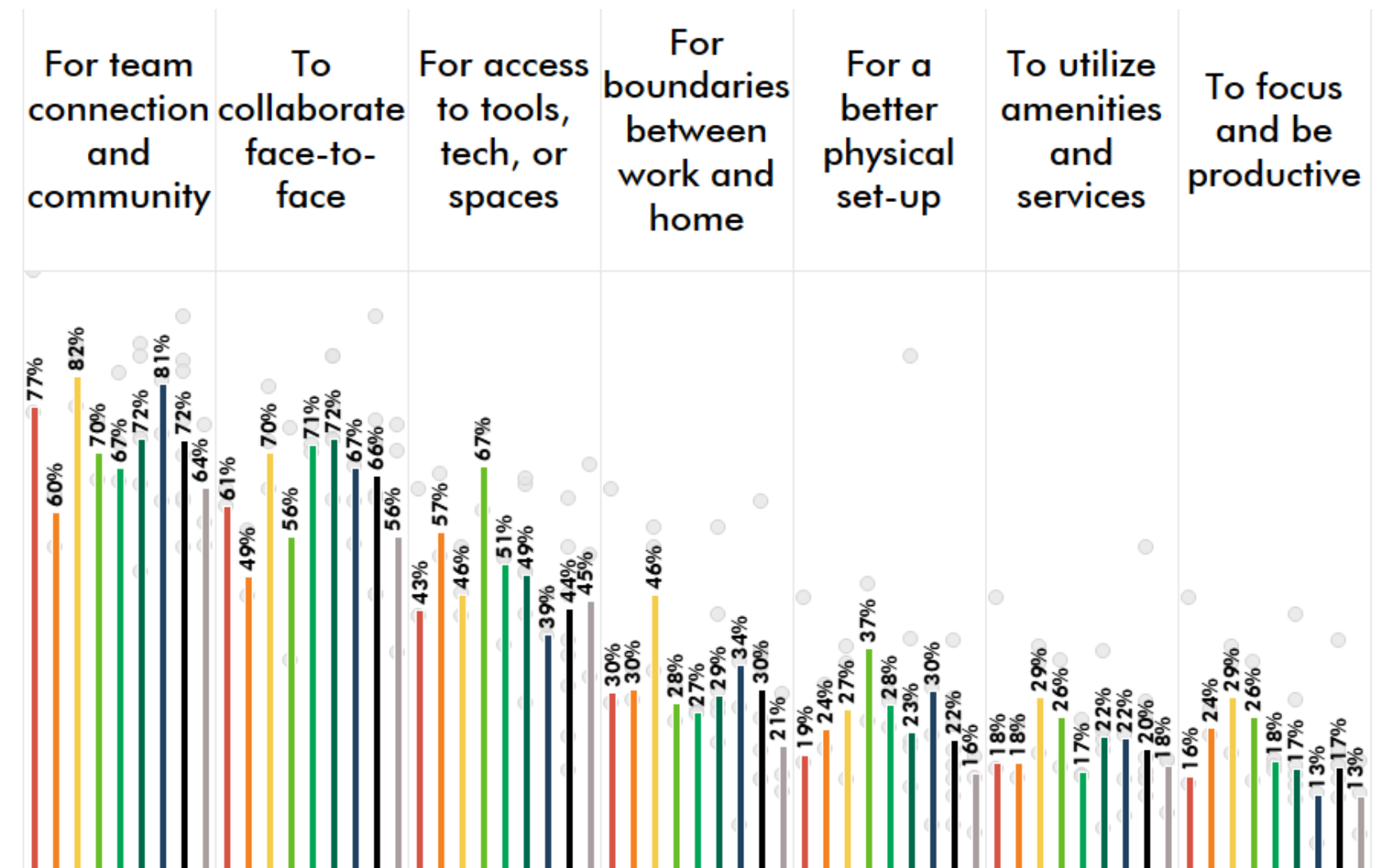
Industry

Does industry impact the purpose of the office?

While it may be tempting to assume that the office has different purposes across different industries, this survey found little such evidence. While business functions certainly vary, at the end of the day, we are all human, and the biggest drivers for coming to the office are human-centric: connection, community, and collaboration.

Purpose of the Office

In a post-COVID world, what are the primary reasons you would come to the office?



Industry

- Banking and Finance
- Business Services
- Consulting
- Legal
- Manufacturing
- Non-profit
- Retail
- Technology
- Other Industry

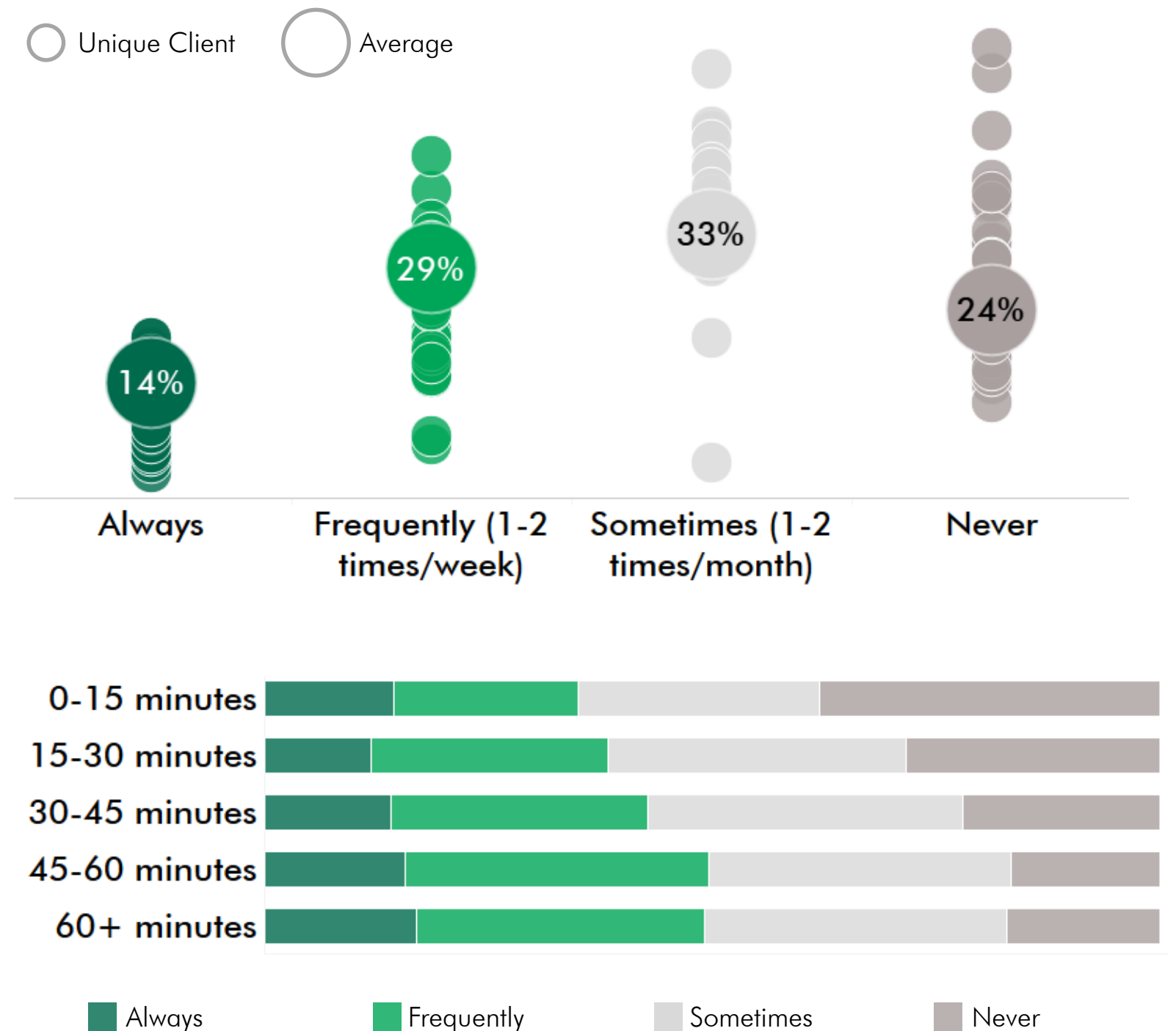
Satellites

An office is an office.
Or is it?

Real estate and occupancy strategies will continue to evolve, as they have always done, but now within a broader workplace context – one that is not defined by four walls but that can exist almost anywhere. For some, that may mean shifting to a hub and spoke model that brings offices closer to employees; for others, it may mean enabling even more remote work. Regardless, it should start with understanding how these opportunities will impact a company's vision, culture, and bottom line.

Alternate Office Locations

In a post-COVID world, would you consider working at a company provided location **closer to your home** (e.g., coworking space, satellite office, etc.)?



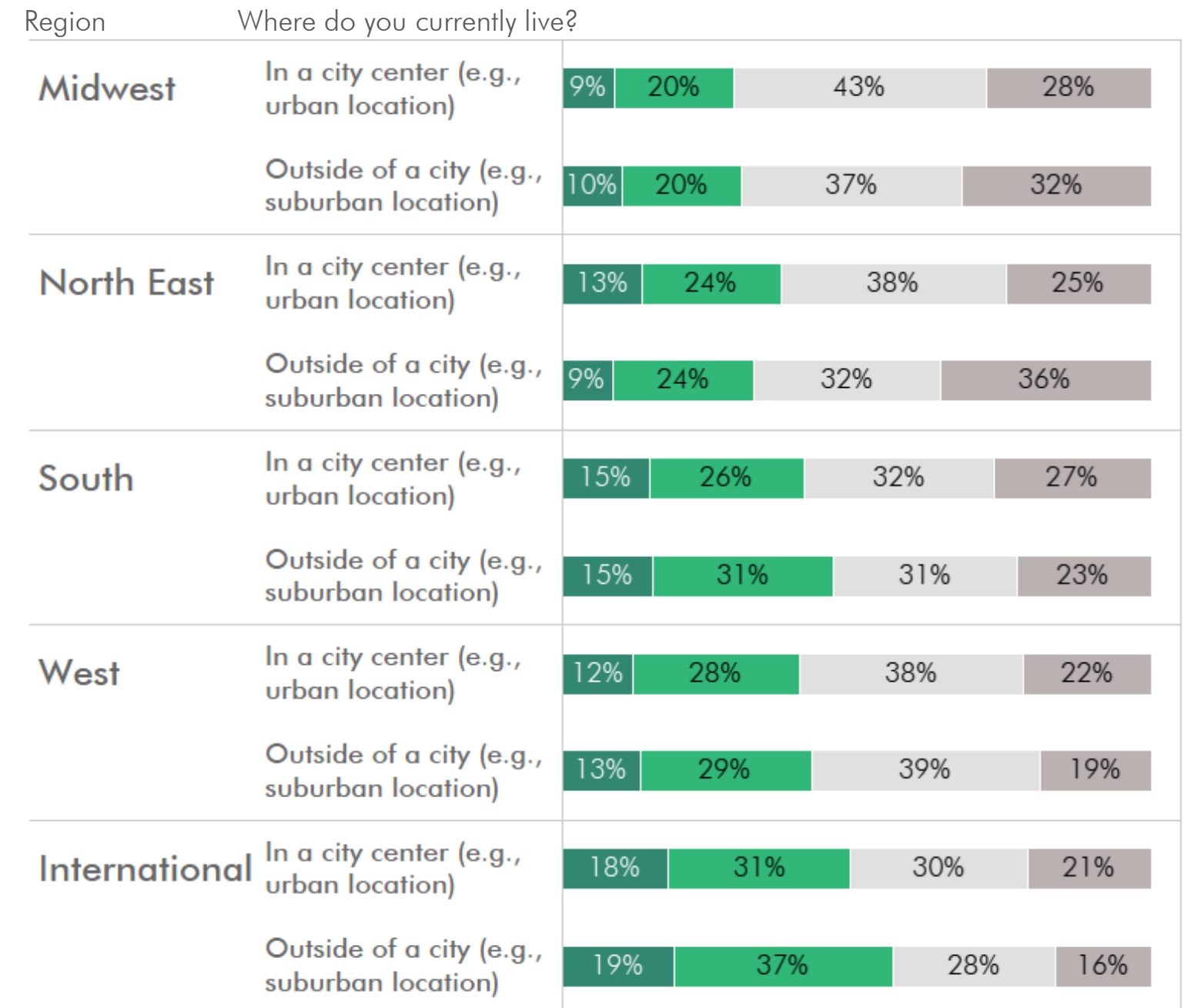
Strategy

A global perspective on local strategies

The evolution of a company's real estate portfolio should be globally-aligned but locally-focused, knowing that culture, workstyles, and expectations will vary across geographies. A research-driven approach will help companies begin to understand these differences, and a multi-disciplinary team can define how they impact strategic decisions around people, policies, and the evolving portfolio.

Alternate Office Locations

In a post-COVID world, would you consider working at a company provided location **closer to your home** (e.g., coworking space, satellite office, etc.)?



Always
 Frequently
 Sometimes
 Never