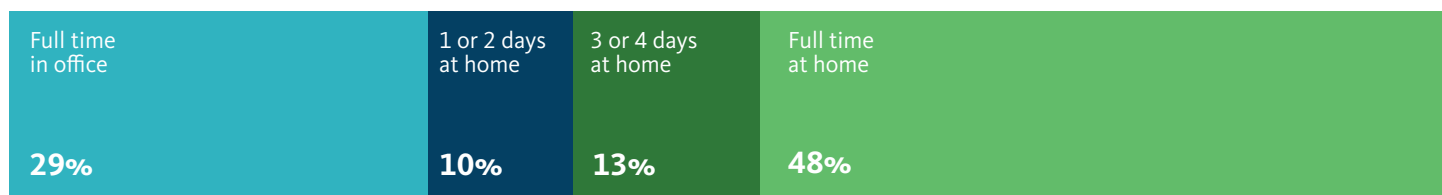


Australia is a pioneer of activity-based working. While the office is here to stay, employees want increased choice to work from home.

WHERE ARE YOU CURRENTLY WORKING (AS OF AUGUST 2020)?



Even among those who are currently full time at the office, **34%** would prefer a hybrid model.

23% are currently in a hybrid work model.

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



67% prefer a hybrid work model.

Over two-thirds of Australian workers want to balance days in the office with days at home; only 9% want to work from home full time. As of August 2020, just over one-quarter of Australian professional workers are working from the office full time; about half continue to work from home full time as a result of the COVID-19 pandemic. For majority of these professionals, the current work model is a result of company or government recommendation; due to the pandemic, only 11% currently get to choose the location where they work.

Having experienced the advantages of both office and remote work, most employees are expressing a desire to benefit from both settings. Companies looking to hire and retain the best talent will benefit from providing employees the flexibility and autonomy that they desire. But what does this mean for organisational culture, productivity, and experience? We explore more to find out.

METHODS The survey of 2,430 Australian workers was conducted via an anonymous, panel-based survey from July 9 to August 13, 2020. Respondents were required to have worked in an office prior to COVID-19. Responses were distributed across nine industries and represent a wide range of seniority levels, roles, ages, and geographies across Australia.

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

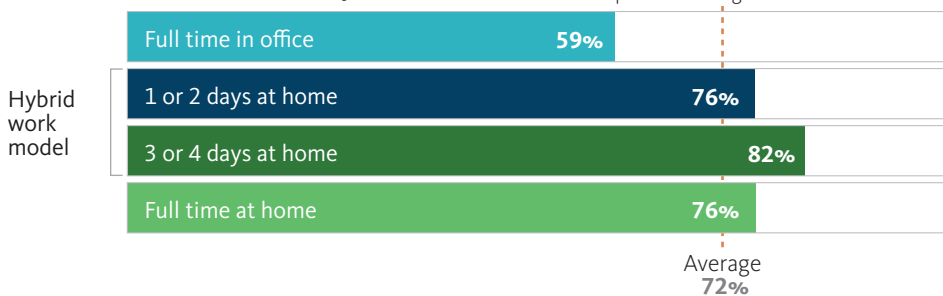
Employees already working in a hybrid model are having the best overall experience, which boosts their job performance.

The COVID-19 pandemic has forced more than 80% employees across Australia to work from home for a prolonged period of time. Those who are working in a hybrid model are more likely than other professionals to feel comfortable in this extended period of telework. 54% feel that working during the pandemic has had a positive impact on their creativity, and 80% feel satisfied with their jobs.

The hybrid model also positively impacts overall employee perceptions—those in a hybrid model are 1.5x more times more likely to believe their workplace offers a great experience than full time, office-going professionals. They also show higher ratings of job satisfaction, personal creativity, and overall wellbeing. Ultimately, the hybrid model allows employees to tailor their working environment to suit their needs.

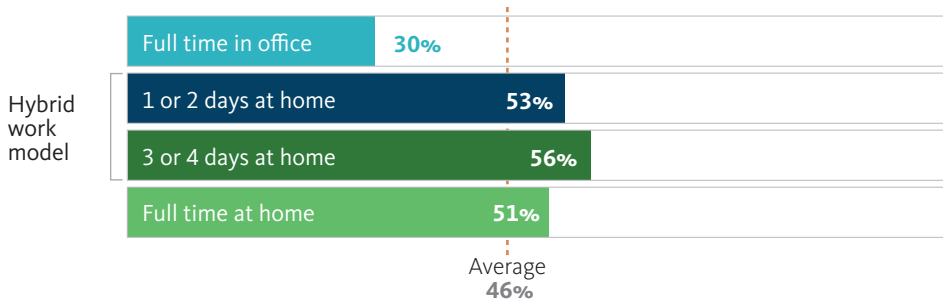
I AM SATISFIED WITH MY JOB*

*Percent of respondents in agreement with statement.



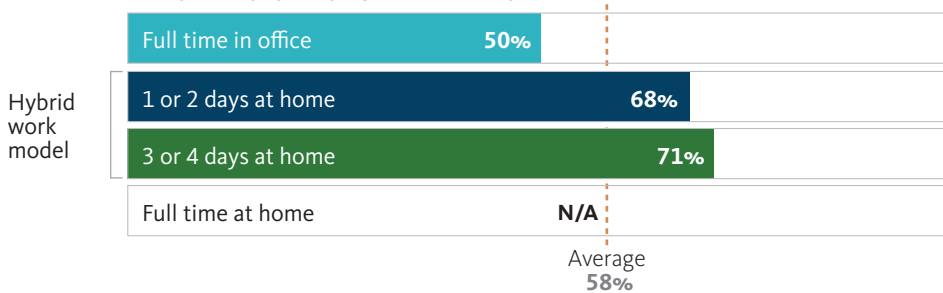
Employees who are in the office full time least likely to be satisfied with their jobs.

WORKING DURING THE PANDEMIC HAS HAD A POSITIVE IMPACT ON MY PERSONAL CREATIVITY*



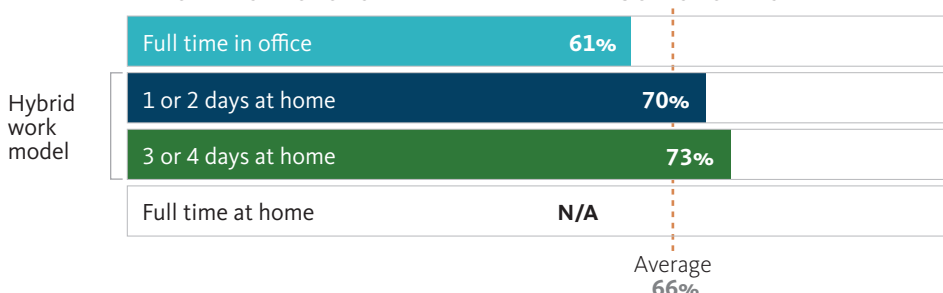
Personal creativity benefits from the variety that comes with a hybrid work model.

MY WORKPLACE OFFERS A GREAT EXPERIENCE*



Those in a hybrid model are more likely to believe their workplace provides a great experience.

MY WORKPLACE PROMOTES THE HEALTH AND WELLBEING OF ITS WORKERS*



Workers in hybrid models are more likely to think their workplace promotes health and wellbeing.

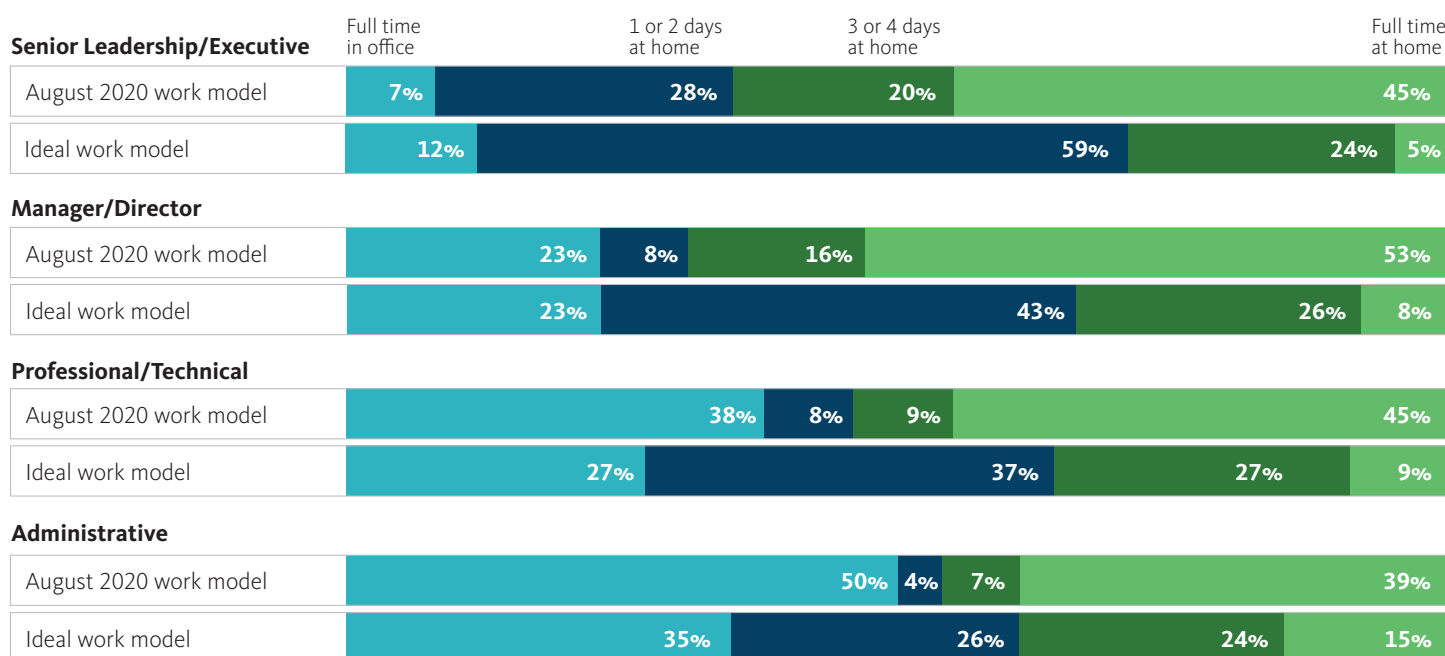
The majority of Australian workers would prefer a hybrid work model in the future.

Within the Australian workforce, employees working in senior leadership positions are currently benefiting the most from the hybrid work model. They are 2x more likely to be in a hybrid model compared to employees working at junior level, and also slightly more likely to prefer it in the future. The data suggests that professional, technical, and administrative professionals are most likely to be either working full time at home or in the office

currently, while their ideal work scenario is more aligned with senior leadership's hybrid workstyles.

Variation in who adopts the hybrid work model may be attributed to job function. Senior leadership considers which job functions rely heavily on in-person collaboration. However, all workers should have this option, not only for its benefits to productivity, but also to improve the workers' work/life balance.

Those in leadership roles are more likely to have already adopted a hybrid work model; many professional, technical, and administrative workers would like to do the same.



What do people like about working in a hybrid work model?

“At home, I can handle my time efficiently.”

“Working at home improves my work and personal life balance.”

“I’d have an extra half hour in the morning and evening with my children.”

“I get more work done from home as there are fewer distractions.”

“I earn enough money while also having enough rest.”

Working from home enables employees to focus and empowers greater flexibility in life and work.

The majority of employees across roles and home situations believe maintaining a work/life balance is easier at home. They also find working from home less stressful, less confusing, more convenient, more safe, and financially viable/sound. Most employees also do not believe their personal and team productivity have been negatively impacted. Working from home for part of the week

enables flexibility in employees' personal and work life.

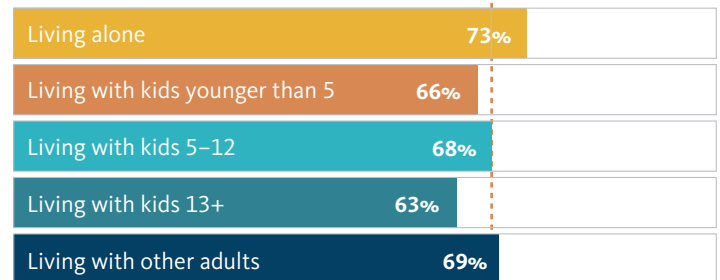
However, employees are also clear that they need days in the office too—only about 9% of employees want to work from home full time. Organisations should look to provide their employees with the flexibility they need while planning for the future.

Most Australian employees believe working from home is effective.



The vast majority of employees find working from home productive, regardless of family status or role.

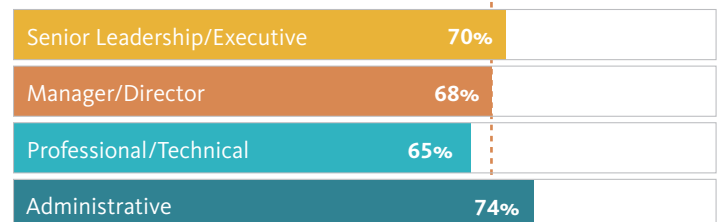
Percent who believe working from home is productive, by family status.



At the time of the survey, all children had returned to school.

Average 68%

Percent who believe working from home is productive, by role.



Average 68%

What do people like about working from home?

- “Working from home provides flexibility and extra time.”
- “Home is much more comfortable.”
- “It’s nice to reclaim 2 hours of my day from the daily commute.”
- “I avoid costs associated with the office.”
- “I avoid commuting five days a week.”

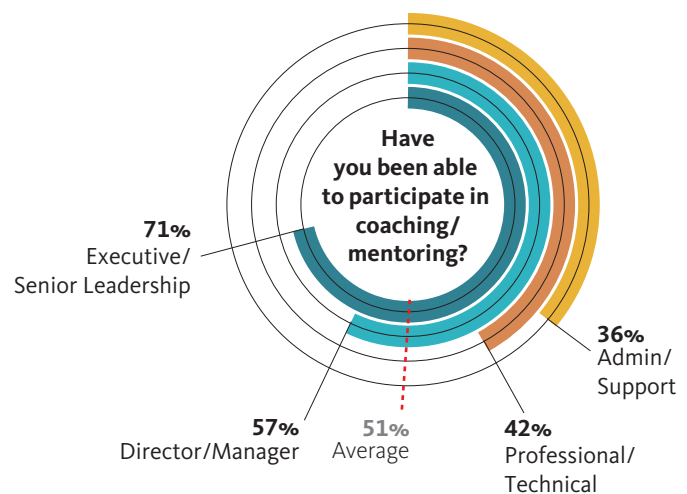
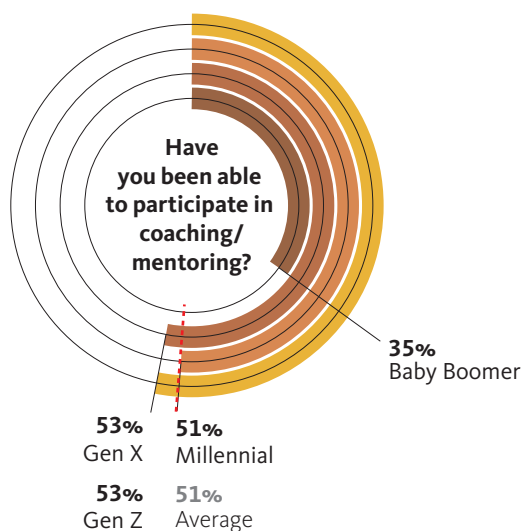
Employees feel that advancement and connection are suffering as a result of remote work.

Our data shows that while employees don't believe that their work would be negatively impacted by working from home, they do believe that maintaining a presence in the office is key to effective career advancement and greater recognition in the organisation. Technical and professional staff have been far less likely than senior leadership to report career growth during the pandemic.

Additionally, many employees report feeling disconnected from others. This is especially true among senior-level employees, who feel the impact at least 2x more than other workers. Just over one-third of Baby Boomers, administrative workers, and technical staff have participated in mentoring or coaching during the pandemic.

On average, just over half of workers have participated in coaching/mentoring while working during the pandemic.

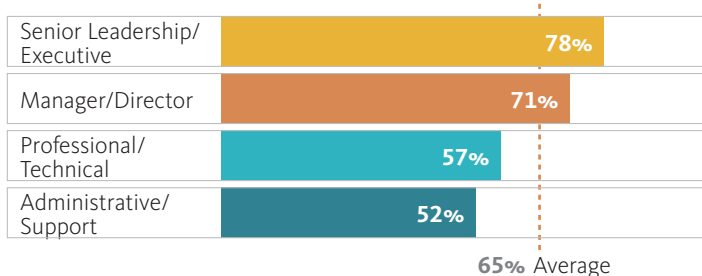
Percent who have participated in coaching/mentoring while working during COVID-19.



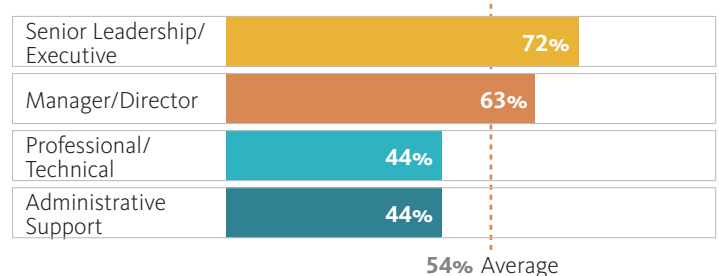
Professional, technical, and administrative workers struggle to maintain awareness of others' work—in particular, the work of those beyond their own teams.

Percent of respondents in agreement with statement, by role.

WHILE WORKING FROM HOME, I AM AWARE OF WHAT OTHERS ON MY TEAM ARE WORKING ON.



WHILE WORKING FROM HOME, I AM AWARE OF WHAT OTHER TEAMS WITHIN MY COMPANY ARE WORKING ON.



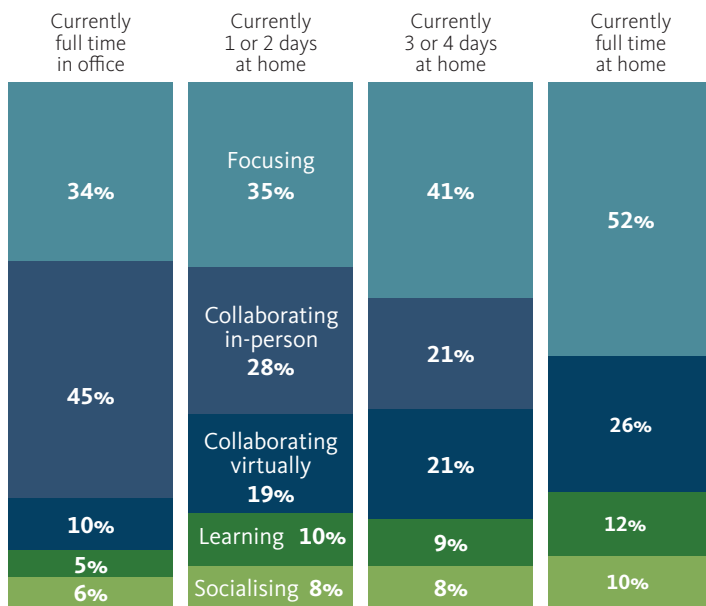
The office is still the best place for employees to build social and professional networks.

The workplace isn't going away in near future. Across roles and generations, at least two-thirds of the Australian workforce agreed on the fact that going to the office would be more about ease of doing work rather than improving the quality of the work produced by their team. Office-going employees spend a significant portion of their time on in-person collaboration. There's also a direct correlation between the amount of time someone

spends at the office and the amount of time spent collaborating. Other key reasons to go to the office include socialisation with colleagues, impromptu face-to-face connections, and to brainstorming/ideating with colleagues. The office will still be a place to focus for many, but not with the same pre-pandemic emphasis.

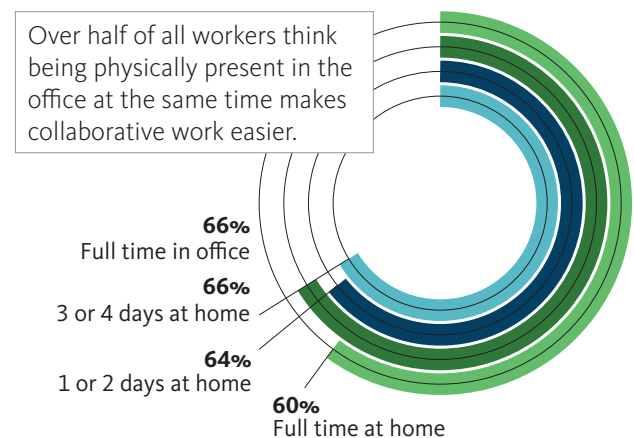
The more time people spend in the office, the more time they spend collaborating.

Percent of time spent in each work mode during an average week, currently.



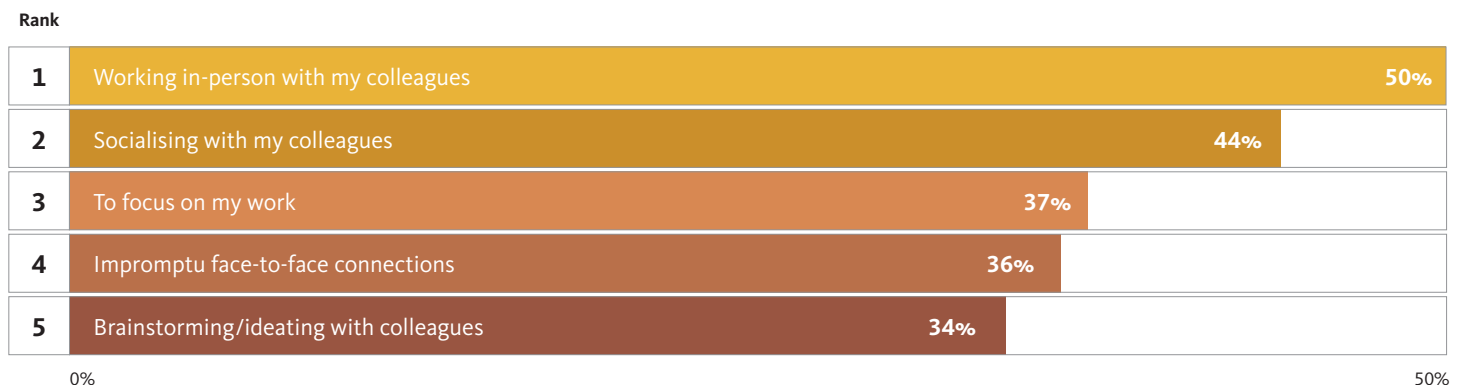
Across all work scenarios, workers think it's easier to get collaborative work done when everyone's at the office.

Percent of workers who say it's easier to work together if everyone works from the workplace.



People want to collaborate, socialise, and connect when they go to the office.

Percent who ranked each item as one of the most important reasons to go to the office.



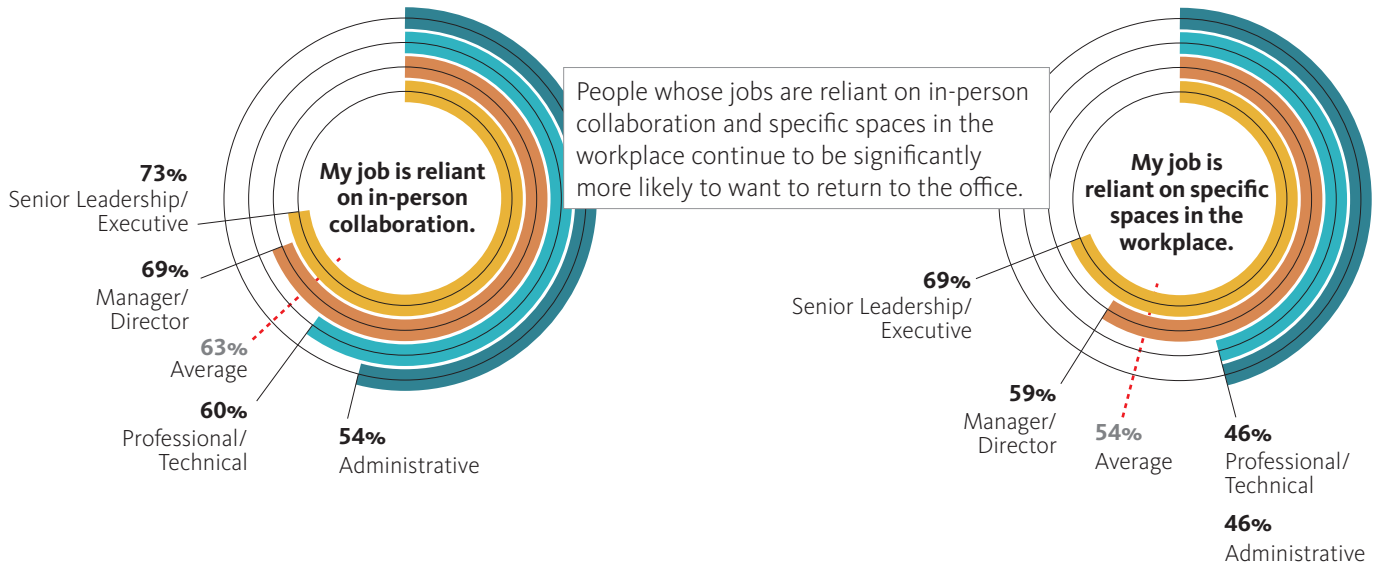
Most jobs continue to require in-person collaboration and specific spaces in the workplace.

Most employees report that collaborating in-person with colleagues is vital to their work. This is especially true for managerial staff and senior-level employees. Nearly three-quarters of workers in senior leadership positions say that their jobs cannot be completed without in-person collaboration. They're also the most likely to say that they require specific spaces in their workplaces to complete their tasks.

Workers who choose the office full time do so for productivity and access to colleagues and technology. Those who choose to work from home full time do so for health and safety reasons, as well as the ability to save time and money and avoid the daily commute.

The majority of workers still say their jobs are reliant on in-person collaboration and specific workspaces, despite extended remote work.

Percent of respondents in agreement with statement, by role.



Workers choose the office for access and productivity; they choose home for safety and convenience. A hybrid model balances 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	Concerns about catching and/or spreading COVID	Concerns about catching and/or spreading COVID	Concerns about catching and/or spreading COVID
2	To be around my team/colleagues	Working where I'm most productive	Saving time	Saving time
3	Working where I have the best computer/technology setup	Saving money	The commute	The commute
4	Concerns about catching and/or spreading COVID	Saving time	Working where I'm most productive	Working where I'm most comfortable
5	Meeting with colleagues	The commute	Saving money	Saving money

In the future, most workers would still prefer some form of open office environment aligned with activity-based working.

The vast majority of Australians still want to work in open office environments. However, employers must evaluate the types and capacities of spaces provided in the workplace in light of the challenges presented by COVID-19—even operating at limited capacity currently, employees reported struggling to find privacy and places to conduct video conferencing.

One big area of discussion is around desk sharing. On this, employees are almost equally split: about half of them prefer an assigned desk, but the other half would trade that assigned desk for greater work from home flexibility. Further, about 25% of employees are ready to support adopting shift schedules and other initiatives to manage flexibility and sharing into the future.

Over two-thirds of the Australian office workers prefer open to somewhat open workplace environments. Only 4% desire totally private space.

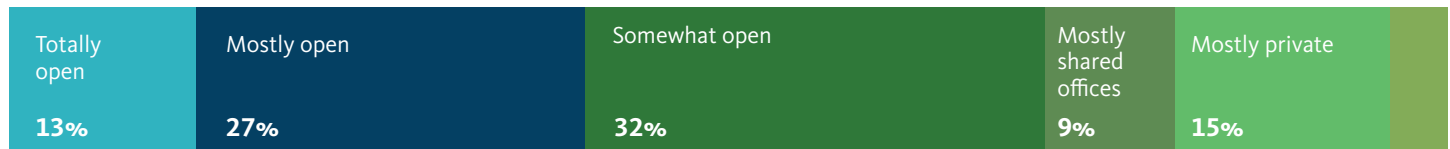
The preference for open environments is similar across generations and role groupings.

PRIOR TO COVID-19, WHAT WAS YOUR PHYSICAL WORKPLACE ENVIRONMENT?



Despite the overall preference for open offices, the desire for mostly private workplaces (19%) showed a strong increase compared to pre-pandemic results (8%).

WHAT IS YOUR IDEAL PHYSICAL WORKPLACE ENVIRONMENT?



Totally private 4%

If given the choice between an assigned desk or greater flexibility to work from home, half of workers would choose greater flexibility.

25%

You share with others, but is cleaned after each use



75%
Used only by you

51%

You share with others, but more opportunities to work remotely



49%

Used only by you, but more expectation of working from the workplace

The hybrid work model empowers employees.

Our data demonstrates that an autonomous workforce has better experiences and delivers stronger overall performance. Choice is powerful, and those working in a hybrid model report higher levels of job satisfaction, creativity,

productivity, focus, and wellbeing. Giving employees the freedom to decide where they work best will boost employee engagement and positively impact all levels of an organisation.

67%

of employees prefer a hybrid work model.

Australian office employees want working from home to continue. Organisations should oblige.

The majority of Australian employees want working from home to continue. However, they also believe that consistently showing up to the office will positively impact both career growth and personal standing within their organisations. In order to empower workers to reap the benefits of working

from home, companies should endeavour to create a culture that promotes remote work as a viable alternative to the office. Workers shouldn't feel that their long-term advancement will be compromised if they choose to take advantage of the balance that remote work provides.

68%

of employees believe that working from home is effective and productive.

The physical workplace is here to stay.

The office is a hub of professional and personal opportunities—from the ability to collaborate in-person and socialise to increased access to mentoring and technology. While the flexibility to work from home is an important element of a balanced, productive workweek,

employers need to understand that the office isn't going away. Using the office as a place to foster connection and culture will provide concrete benefits to employees on the days they choose to come to the workplace.

91%

of employees want to return to the office at least one day a week.