



WORKFORCE SENTIMENT SURVEY

Insight Report

The Workforce Sentiment Survey collected data around employee experience and expectations while working remotely during the COVID-19 pandemic. While these insights reflect a moment in time, they are a relevant gauge of workforce expectations as real estate executives create strategies to redefine the work experience. The data represents sentiment from company leaders, managers and employees.

SURVEY STATS

32
COMPANIES

10K
RESPONSES

18
COUNTRIES

Survey conducted from June 16, 2020 to August 7, 2020

Five Key Takeaways

1 | **REMOTE WORK LOOKS AND FEELS PRODUCTIVE TO MOST**

90%+

of employees and company leaders feel productivity is the same or greater while working remotely.

2 | **REMOTE WORK IS HERE TO STAY**

85%

of employees prefer to work remotely at least two to three days a week in the future.

3 | **THE OFFICE IS HERE TO STAY, TOO**

60%

of respondents will return to the office in the future for community and collaboration.

4 | **REAL ESTATE PORTFOLIOS MIGHT LOOK DIFFERENT**

43%

of respondents would consider working from a company-provided location nearer to their home at least a few times a week.

5 | **THERE IS NO ONE-SIZE-FITS-ALL FOR REMOTE POLICIES**

54%

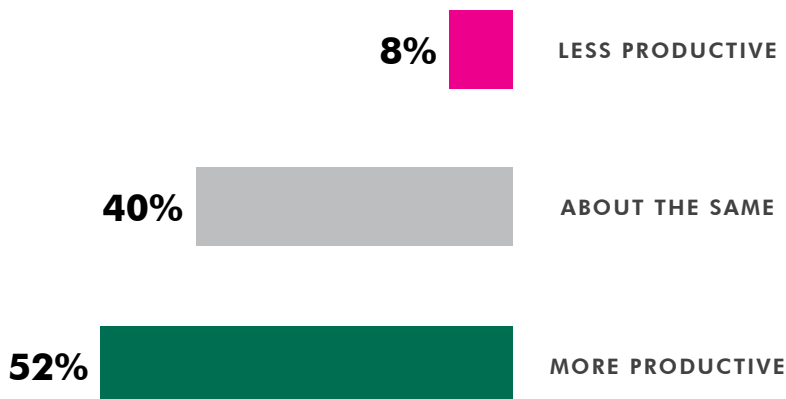
of company leaders prefer a hybrid arrangement for their team that combines working remotely and from the office.

Productivity

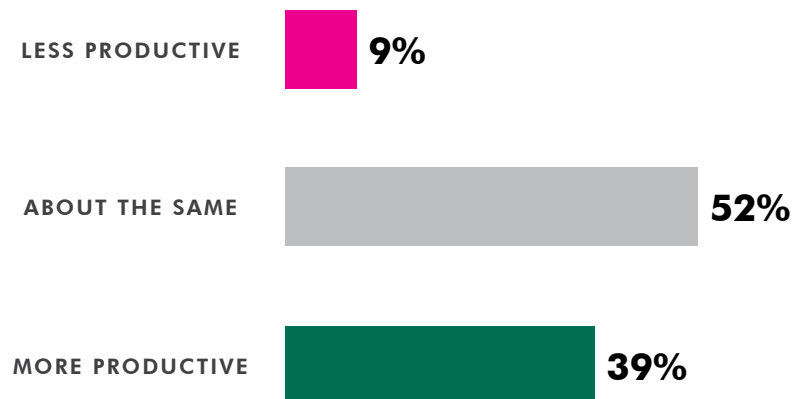
Remote work looks and feels productive to most.

Employees and company leaders equally feel that working remotely has negligible perceived negative impact on productivity. While 52% of employees feel more productive, an equal percentage of company leaders feel that productivity is about the same. Collectively, 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?

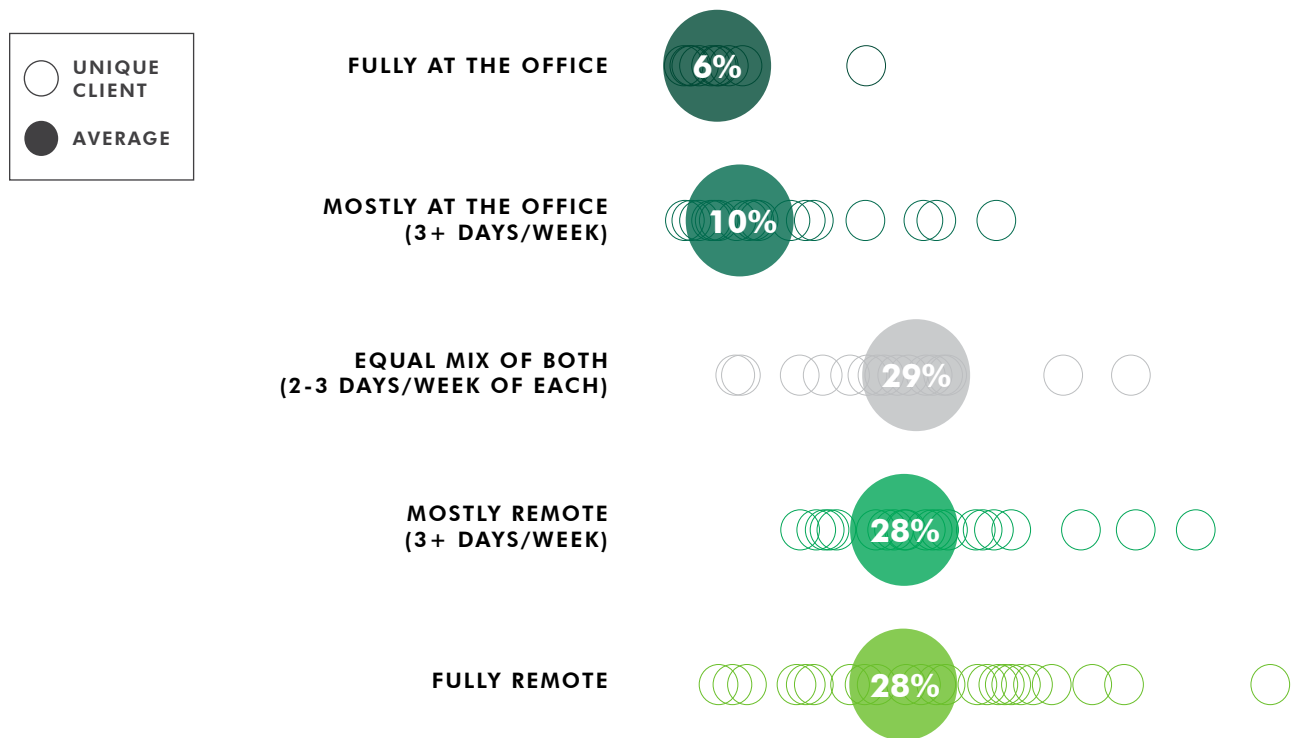


Remote 2.0

Remote work is here to stay.

Looking beyond the pandemic, the appetite for remote work will certainly increase. Current and future employees will continue to expect more flexibility in how and when their work gets done. More want to work remotely full time than at the office full time, while the majority want a certain balance between both—indicating a need for flexible remote policies and strategies.

When the COVID crisis is over, where would you prefer to work?

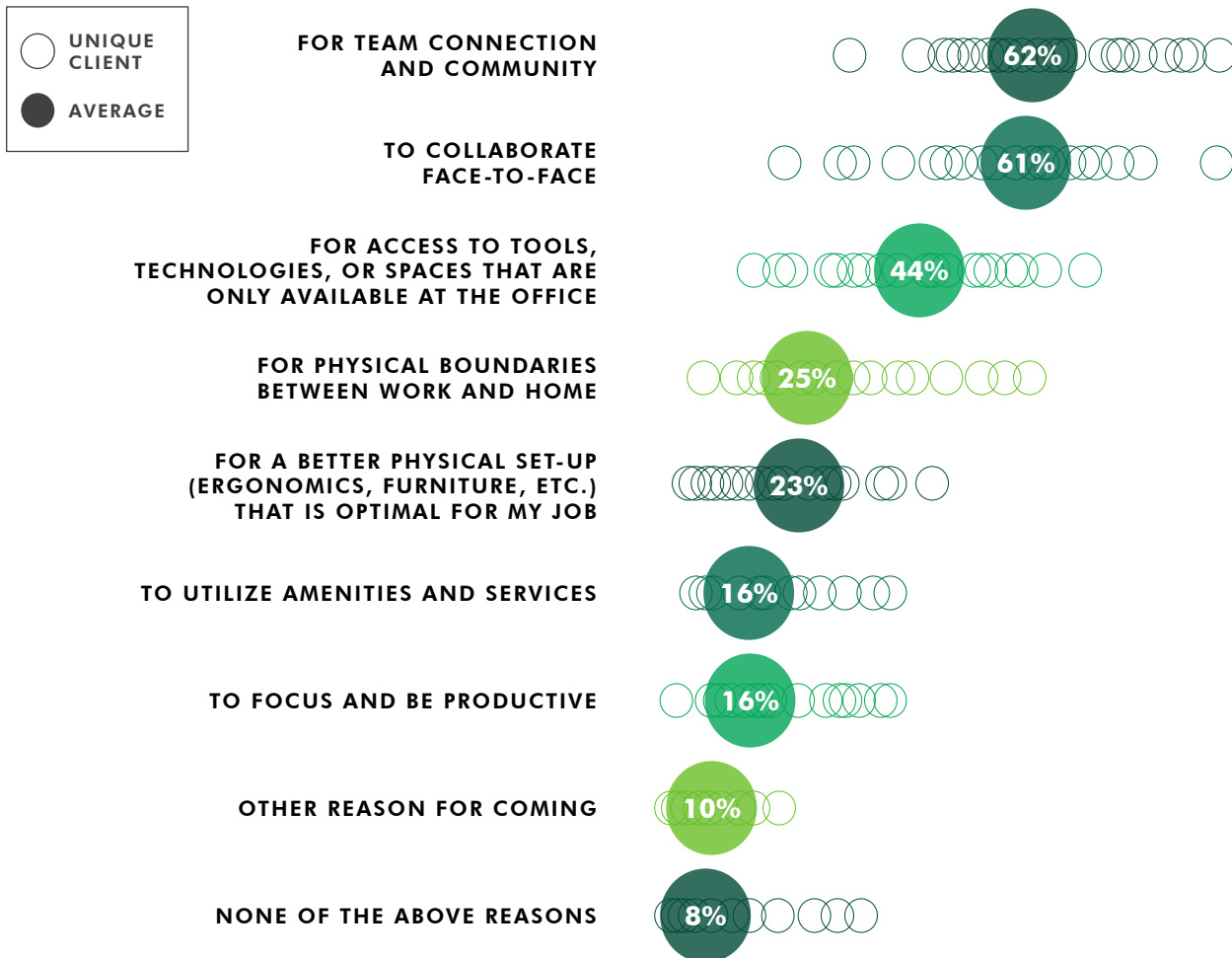


Office 2.0

The office is here to stay, too.

The increase in remote work will certainly have an impact on office utilization, but it will not mean an end to the office—rather, a fresh start. 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. In all cases, the office must be equipped with the appropriate technology to effectively connect a more distributed workforce. Regardless, changes like these were being considered before COVID and should continue to be driven by a company’s people, culture and vision—not this pandemic.

When the COVID crisis is over, what are the primary reasons you would come to the office?

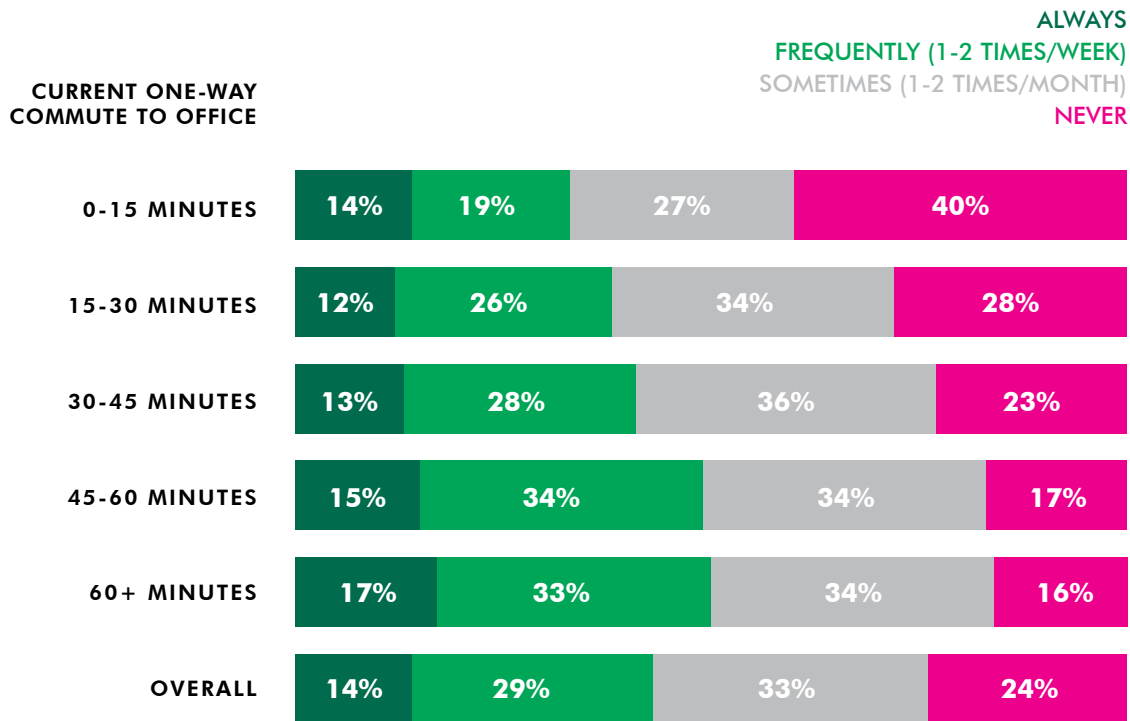


Portfolio

Real estate portfolios might look different.

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, productivity and bottom line.

When the COVID crisis is over, how often would you consider working at a company-provided location closer to your home (e.g. coworking space, satellite office, etc.)?

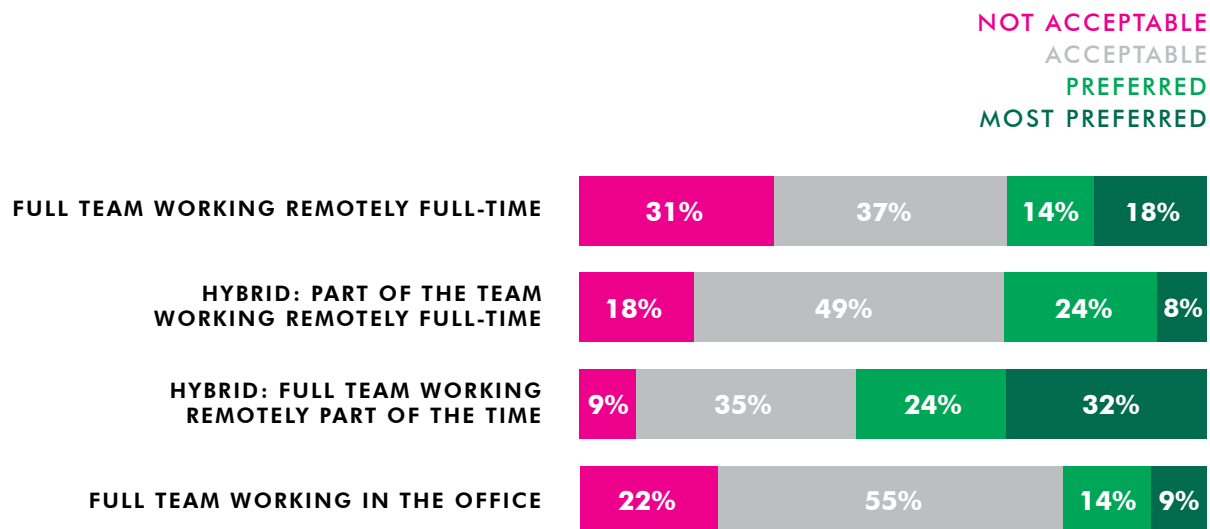


Policies

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

Most company leaders recognize that having a full team in the office every day is a thing of the past and supporting more fluid working is the way of the future. Whether it's in-office team days, "WFH Wednesdays" or a more flexible arrangement, teams will likely work from multiple environments from now on. Approaches to remote work will vary by company, department and leader, which is why it's important for companies to create clear but flexible remote-work policies. Regardless of when or how employees work remotely, it will be important to empower managers to create their own team norms, behaviors and expectations.

As a people manager, please rank the following team scenarios (asked only of leaders)...



Conclusion

Understanding what drives change.

From an employee perspective, COVID-19 hasn't impacted productivity as much as expected, but it has certainly shifted sentiment toward the future. For many, the amount of time spent in the office may never return to pre-COVID levels, as employees have not only embraced remote work but have become accustomed to the autonomy that comes with it. However, with a renewed focus on quality of both the workplace experience and design, it is clear the role of the office as a destination for employees is still important for companies to maintain.

The long-term outcome of COVID-19 will be a combination of changes to workplaces, policies and real estate portfolios, and each company will establish its own stance on remote work and the [role of the office](#). Regardless of the destination, the road to this future should start with culture and be paved by a data-driven and people-centric approach to change.

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