GLOBAL WORKPLACE SURVEY COMPARISON
2023

Workers need the office to drive their productivity; and it's time for the workplace to meet the moment.

Ideal time needed in the office during a workweek

CANADA	56%
U.S.	62%
MEXICO	62%
UK	66%
GERMANY	62%
SAUDI ARABIA	64%
UAE	62%
SINGAPORE	64%
PHILIPPINES	68%

Gensler **RESEARCH** INSTITUTE

Visa CEMEA Headquarters—Dubai

Work today feels different. Almost two-thirds of employees are still working in the same workplaces they left pre-pandemic.

Since Gensler first started its Workplace Performance Surveys in 2005, workplace design has constantly evolved. The workplace has been on a consistent trajectory towards more diverse, dynamic, and open spaces over the past two decades. For the most part, the workplace has kept pace with shifts in how employees work. Now, we are beginning to see that the two have fallen out of sync. Emerging from the pandemic, organizations across the world are navigating new employee expectations alongside "stagflation"—a condition of simultaneous high inflation and low growth caused by emerging geopolitical tensions, uneven pandemic recovery, and bottlenecks in global supply chains. The stakes have been raised globally to create workplaces that optimize both performance and employee experience.

Workplace design has traditionally been primarily based on efficiency-centric business metrics such as density. The rise of hybrid working and an 'everywhere' working model has empowered office workers with the agency to map their own work schedules across different locations throughout their workweek. They are guided by the experiences they want and the tasks they need to perform.

The accelerated shift to mobile work has created a universal challenge for the workplace. Average office occupancy rates are hovering at around 46.3%, half of pre-pandemic levels according to Kastle Systems data from April 2023. This aligns with our international panel of respondents who report spending half of their typical working week in the office, on average. Now is the time to think radically differently about how we can leverage the office to enhance performance and experience. Employees across the world expect their workplace to be a destination of choice, not an obligation.

Our global workplace surveys span two decades of workplace performance data.

To better understand how the workplace can be used as a tool to enhance employee performance and experience, we surveyed 14,000 full-time office workers across nine countries and three continents between June and December 2022. We explore the universal similarities and unique differences across a spectrum of industries, roles, ages, and regions.

Gensler has a rich legacy of workplace research spanning almost 20 years. We have measured workplace performance and experience data from across the world to understand how the office is responding to critical changes in work. Over the years, we expanded our research efforts globally, exploring how the workplace environment impacts innovation and the types of spaces that are most effective. Each survey has revealed the pivotal points in which the landscape of work has shifted.

Global Workplace Survey Comparison 2023

Over 14,000 respondents

Respondents
200

2,013

1,200

2,035

7,258

4,040

8,691

20,396

11,604

5,986

8,217

2005	2006	2008	2013	2016	2017	2019	2020		2021	2022	2023
UK	U.S.	U.S. UK	U.S.	U.S. UK ASIA	LATAM	U.S. GERMANY	U.S. MIDDLE EAST JAPAN	U.S. UK FRANCE AUSTRALIA	U.S. INDIA CHINA	U.S. MEXICO CANADA	UK GERMANY MIDDLE EAST SINGAPORE & PHILIPPINES

Linking design and performance

First established critical work modes and the link between workplace design and employee performance.

Creating great experiences

Spaces for privacy and amenities play an important role in delivering a great workplace experience.

Decline in performance

Space effectiveness and workplace experience in decline, unassigned seating struggled, and coworking increased.

Shifting to hybrid working

Mass adoption of work-from-home and hybrid work models shifted workplace expectations, and top-performing companies use the office differently.

Reimagining the workplace

Work is evolving and the workplace needs to make critical changes to adapt.

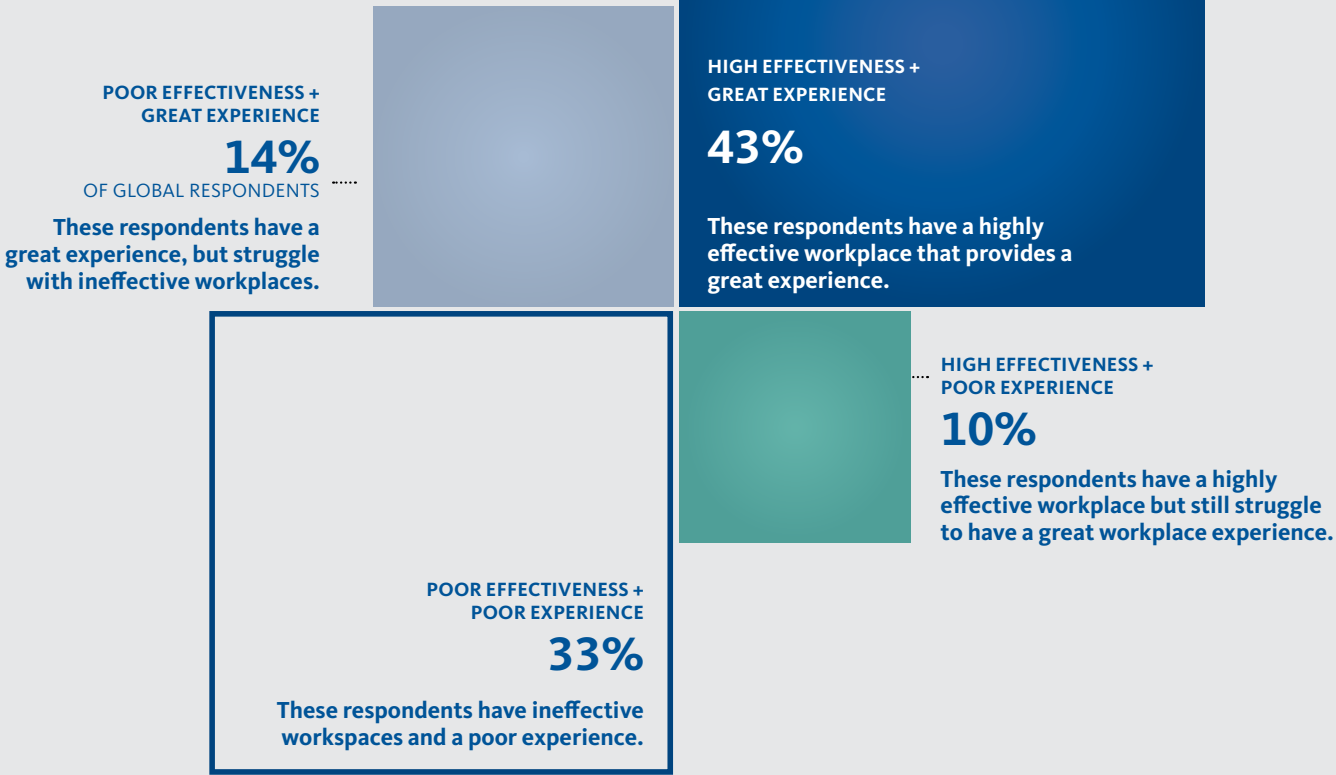# Space effectiveness and workplace experience must work in tandem.

Space effectiveness and workplace experience are strongly related—together they are key drivers of workplace performance. Employees in offices that score highly for effectiveness (WPI) and workplace experience (Experience Score) have higher levels of innovation, engagement, and commitment to their organization. The majority of employees work in an office that scores either highly or poorly on both.

While 43% of workplaces are highly effective and offer a great experience, one-third score poorly for both. Employees working in these environments have the lowest levels of engagement, innovation, and commitment to their organization.

There is significant room for improvement for both space effectiveness and workplace experience to broaden opportunities to optimize engagement and performance. The global workforce has evolved since the pandemic, yet the spaces they work in haven't been redesigned since the pandemic. As we emerge from the pandemic, the workforce is looking for spaces that align with the new ways they are working.

HOW THE GLOBAL WORKPLACE MEASURES UP.

Respondent breakdown into those above and below average experience and effectiveness, and how the two scores interact.

POOR EFFECTIVENESS + GREAT EXPERIENCE

14%

OF GLOBAL RESPONDENTS

These respondents have a great experience, but struggle with ineffective workplaces.

HIGH EFFECTIVENESS + GREAT EXPERIENCE

43%

These respondents have a highly effective workplace that provides a great experience.

HIGH EFFECTIVENESS + POOR EXPERIENCE

10%

These respondents have a highly effective workplace but still struggle to have a great workplace experience.

POOR EFFECTIVENESS + POOR EXPERIENCE

33%

These respondents have ineffective workspaces and a poor experience.

WORKERS ACROSS THE WORLD HAVE A HIGH DEGREE OF CHOICE, YET THEIR WORKPLACE HASN'T BEEN REDESIGNED SINCE THE PANDEMIC.

Percentage point difference between between choice and redesign, based on percentage of total respondents who fall in each category.
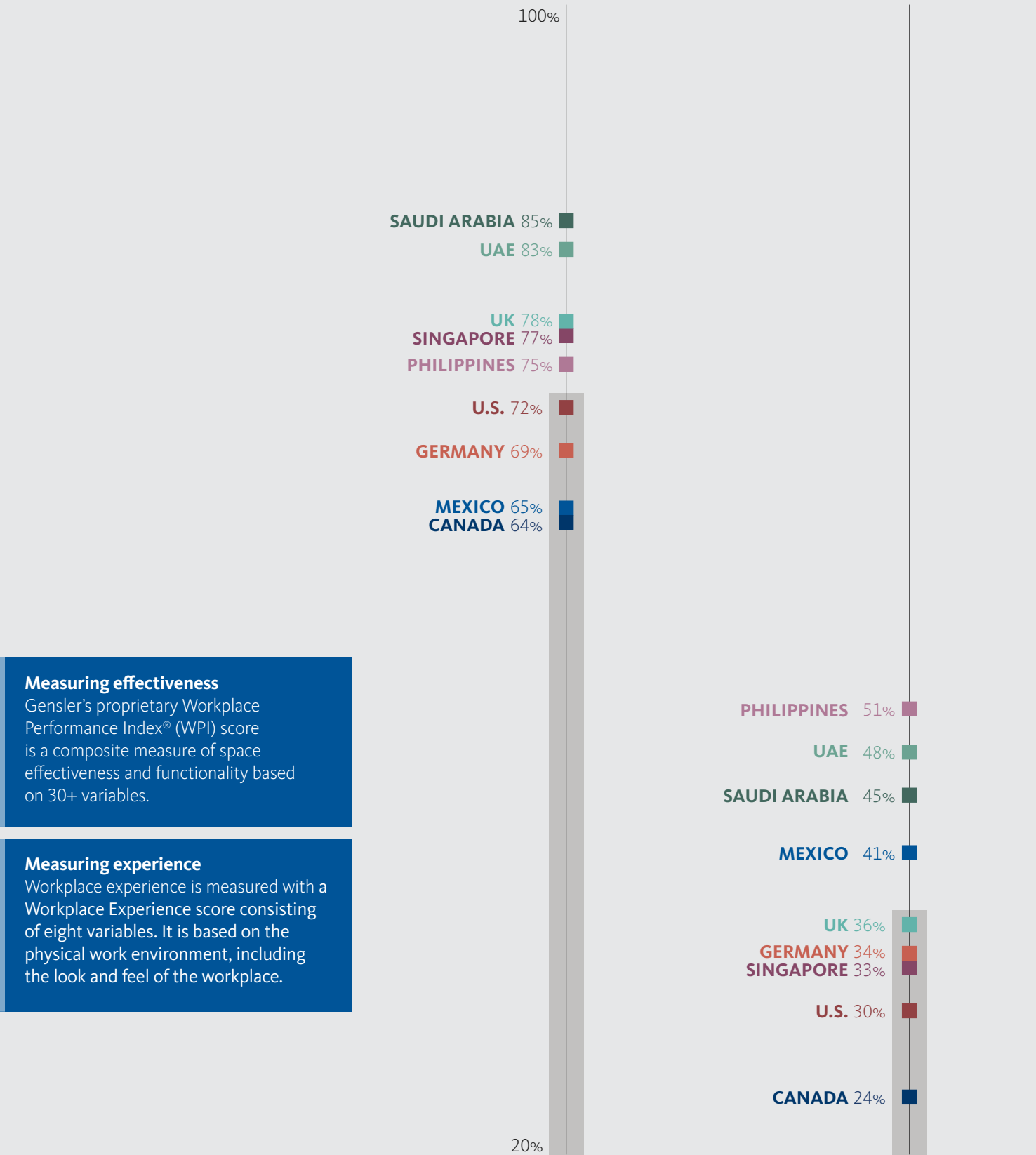
Measuring effectiveness
Gensler's proprietary Workplace Performance Index® (WPI) score is a composite measure of space effectiveness and functionality based on 30+ variables.

Measuring experience
Workplace experience is measured with a Workplace Experience score consisting of eight variables. It is based on the physical work environment, including the look and feel of the workplace.

CHOICE

Percentage of employees who have choice in where they work within the office.

REDESIGNED

Percentage of employees who work in offices redesigned within three years.

100%

SAUDI ARABIA 85%
UAE 83%

UK 78%
SINGAPORE 77%
PHILIPPINES 75%

U.S. 72%

GERMANY 69%

MEXICO 65%
CANADA 64%

PHILIPPINES 51%

UAE 48%

SAUDI ARABIA 45%

MEXICO 41%

UK 36%
GERMANY 34%
SINGAPORE 33%

U.S. 30%

CANADA 24%

20%

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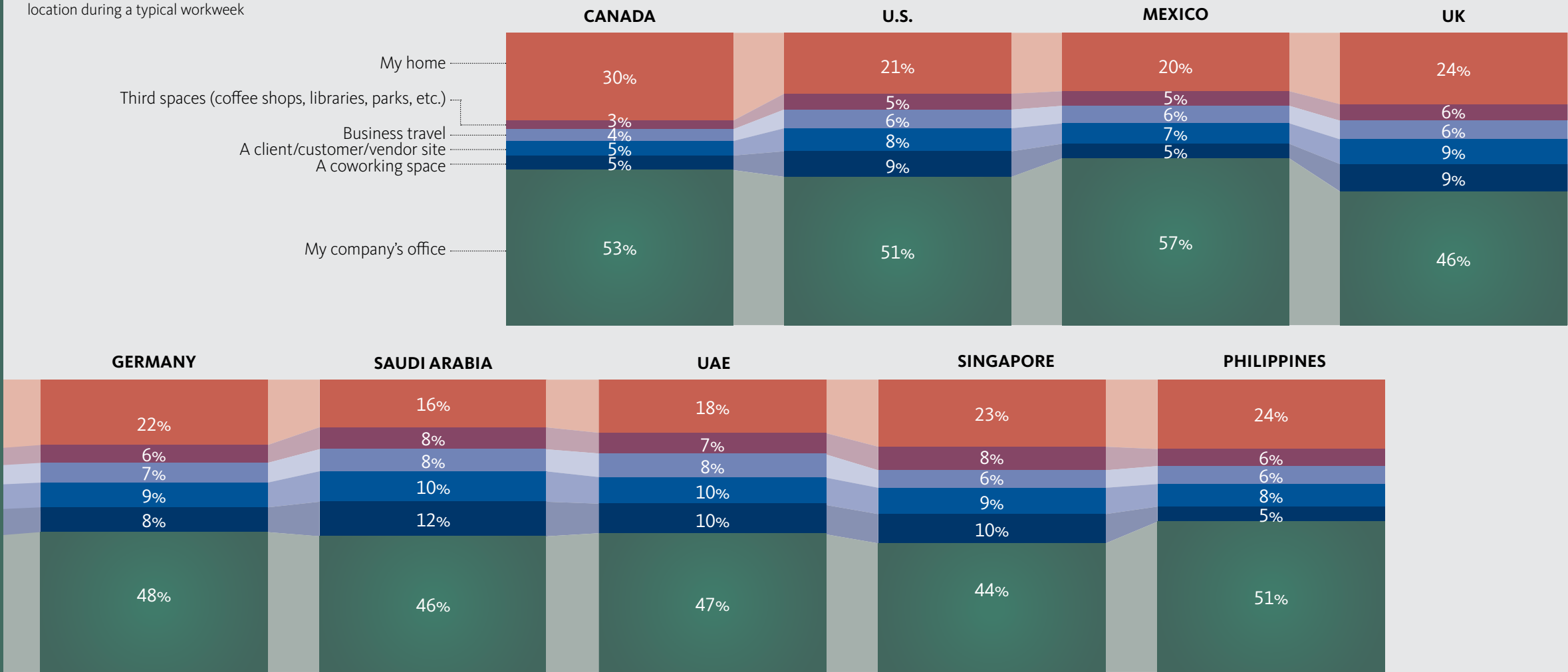
Hybrid is here to stay, but so is the office.

The pandemic accelerated many trends including the decoupling of work and place, choice, and flexibility. Today, knowledge workers have more autonomy over how and where they work in a hybrid model. While many employees have always worked in and out of the office, this shift emphasizes the wider ecosystem of workplace in which the office sits.

Employees are working in a hybrid model across all nine countries. Alongside the office and their home, they are working across a spectrum of workspaces, including coworking locations, client sites, libraries, traveling, secondary offices, and coffee shops. For some countries—such as Germany, UK, U.S., Saudi Arabia, and UAE—this marks a significant decline in the time spent at the office from previous years. While our previous research across different countries indicates that, on average, workers have never worked full-time in the office, there is a clear trajectory towards more mobile work patterns.

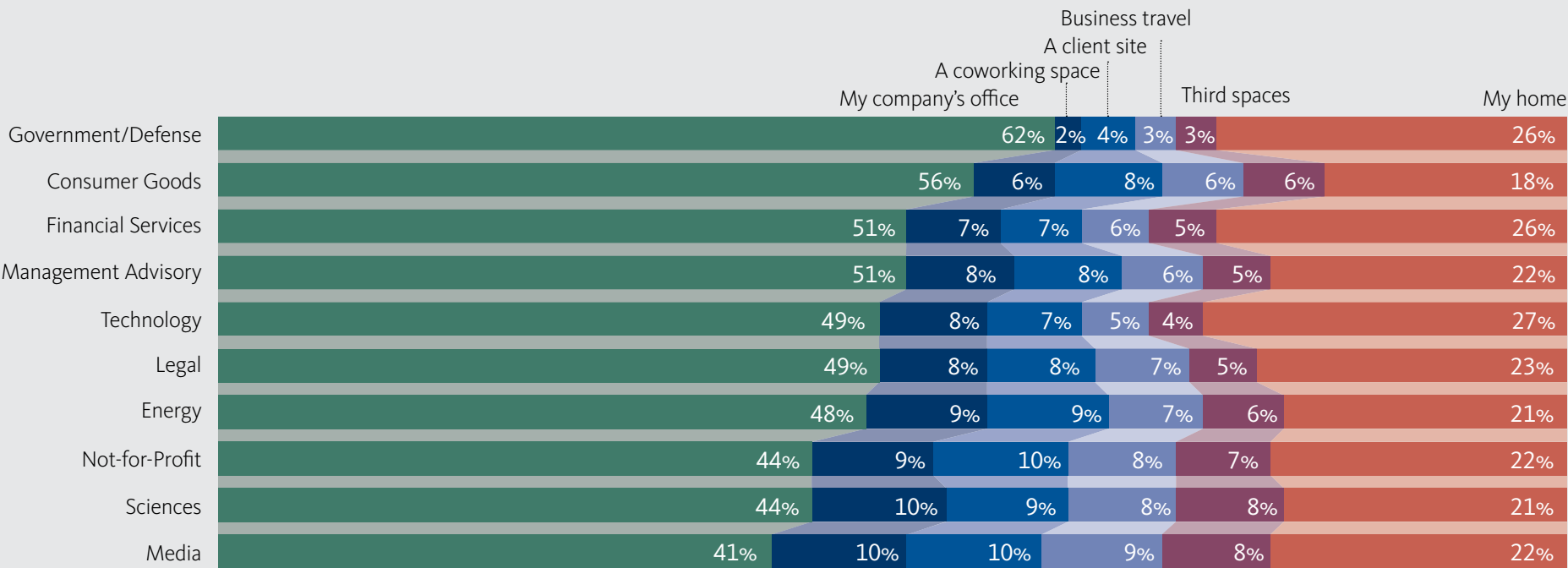**GLOBAL WORKERS ARE MOBILE—SPENDING HALF OF THEIR TIME AT THE OFFICE.**

Percentage of time spent working in each location during a typical workweek

Location	CANADA	U.S.	MEXICO	UK
My home	30%	21%	20%	24%
Third spaces (coffee shops, libraries, parks, etc.)	3%	5%	5%	6%
Business travel	4%	6%	6%	6%
A client/customer/vendor site	5%	8%	7%	9%
A coworking space	5%	9%	5%	9%
My company's office	53%	51%	57%	46%

Location	GERMANY	SAUDI ARABIA	UAE	SINGAPORE	PHILIPPINES
My home	22%	16%	18%	23%	24%
Third spaces	6%	8%	7%	8%	6%
Business travel	7%	8%	8%	6%	6%
A client site	9%	10%	10%	9%	8%
A coworking space	8%	12%	10%	10%	5%
My company's office	48%	46%	47%	44%	51%

EMPLOYEES IN INDUSTRIES SUCH AS MEDIA, SCIENCES, AND NOT-FOR-PROFITS ARE MORE LIKELY TO WORK ACROSS DIFFERENT LOCATIONS.

Percentage of time spent working in each location during a typical workweek, segmented by industry.

Employees working in consumer goods, financial services, and government/defense are most likely to spend more than half of their typical week at the office.

Industry	My company's office	A coworking space	A client site	Business travel	Third spaces	My home
Government/Defense	62%	2%	4%	3%	3%	26%
Consumer Goods	56%	6%	8%	6%	6%	18%
Financial Services	51%	7%	7%	6%	5%	26%
Management Advisory	51%	8%	8%	6%	5%	22%
Technology	49%	8%	7%	5%	4%	27%
Legal	49%	8%	8%	7%	5%	23%
Energy	48%	9%	9%	7%	6%	21%
Not-for-Profit	44%	9%	10%	8%	7%	22%
Sciences	44%	10%	9%	8%	8%	21%
Media	41%	10%	10%	9%	8%	22%

Employees have shifted their priorities for the office.

FOR THE MAJORITY OF EMPLOYEES, THE MOST IMPORTANT REASON TO COME INTO THE OFFICE IS TO "FOCUS ON MY WORK."

Ranked list of reasons that are important to come to the office. Respondents selected their top 5 reasons.

During the pandemic, when the majority of office workers across the world were working from home, they stated that the most important reason to come into the office was to work in-person with their team and colleagues. A different pattern is emerging: workers now rate "to focus on my work" as the top reason. This is consistent across all countries with the exception of workers in Mexico and Germany, who prioritize the office for scheduled, in-person meetings with their team.

Collectivist countries such as Singapore, Philippines, Mexico, and Saudi Arabia, per Hofstede's Cultural Dimentions, highly prioritize the office for professional development opportunities, while individualist countries rank access to technology and scheduled, in-person meetings with their team and colleagues as more important.

Despite these nuances, the top five reasons to come into the office are remarkably consistent across the world. Employees value the office to focus on their work, meet their colleagues, and access critical tools and people. This signals a shift from the office as an important place to rebuild social capital during the pandemic, to a place where employees can simply get their work done alone and with their colleagues.

Younger workers value coming into the office more to be part of a community and to socialize with their colleagues, as well as to focus on their work and gain access to specific spaces and technology.

GLOBAL AVERAGE RANKS

CANADA   U.S.   MEXICO   UK   GERMANY   SAUDI ARABIA   UAE   SINGAPORE   PHILIPPINES

1. To focus on my work
2. Access to technology
3. Scheduled, in-person meetings with my team / colleagues
4. Professional development / coaching
5. Scheduled, in-person meetings with clients / customers
6. Access specific spaces, materials, or resources
7. Socializing with colleagues
8. Access to senior leaders / decision-makers
9. To be visible for opportunities when they arise
10. To be part of the community
11. Impromptu, face-to-face meetings
12. To sit with my team
13. Access to an ergonomic work-setting
14. Access to amenities (food, coffee, wellness)

The box size corresponds with the percentage of respondents who selected each reason in their top 5.

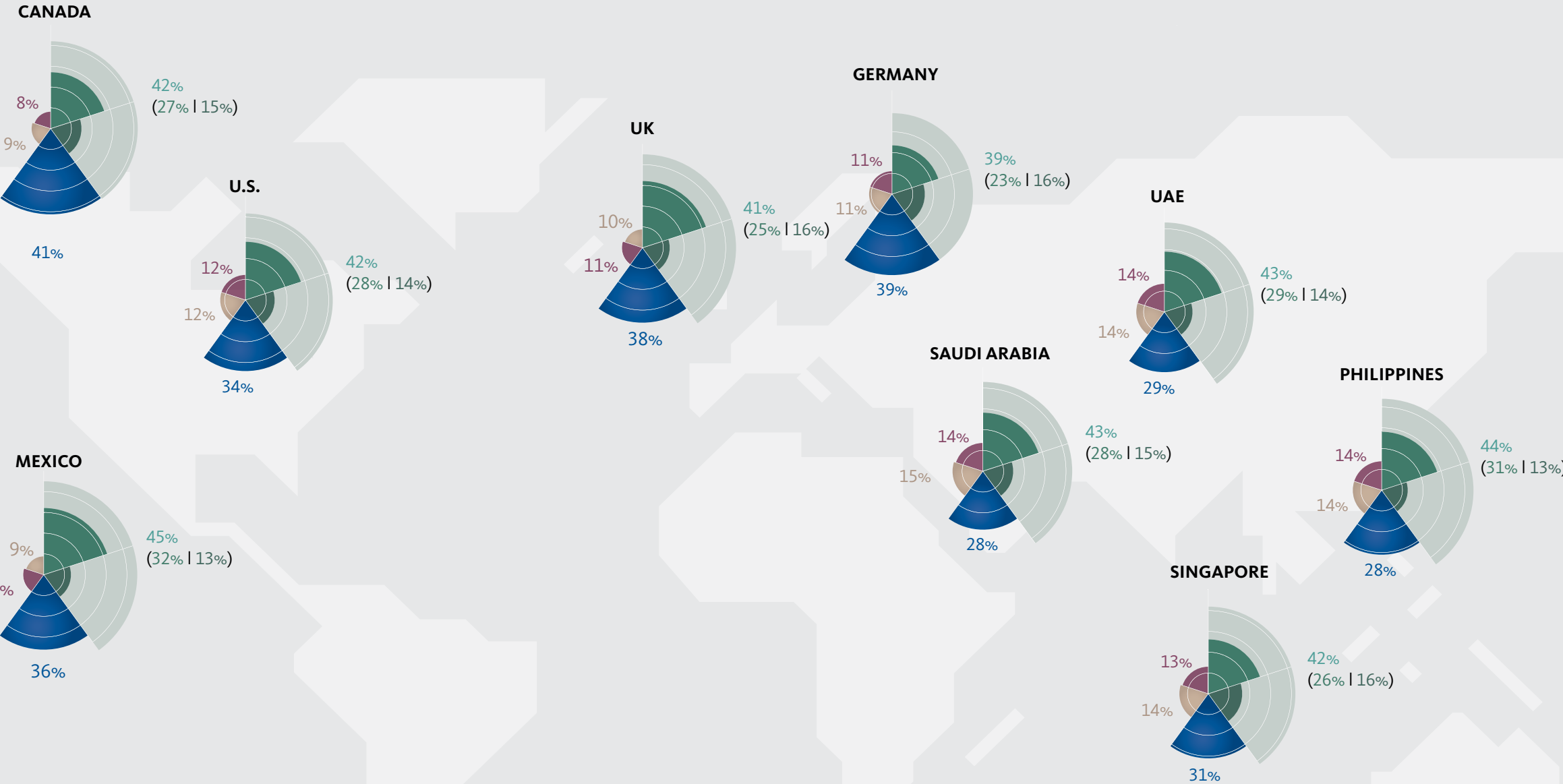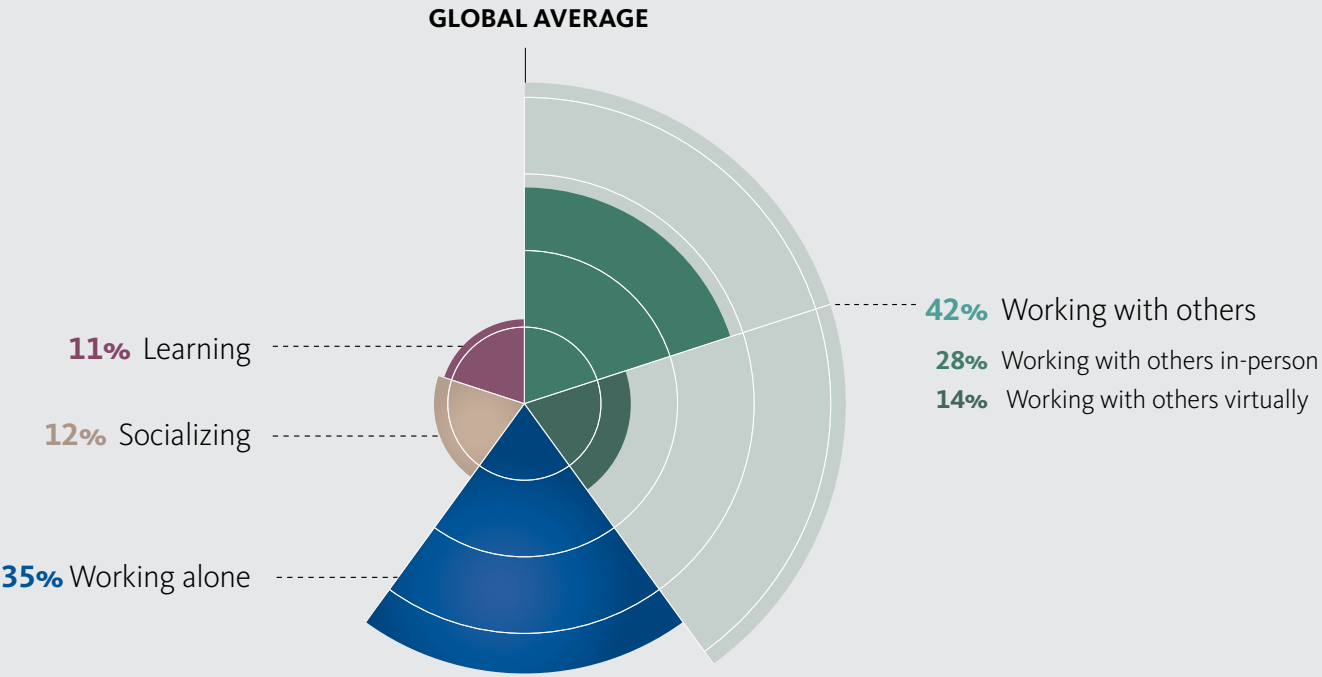# Employees across the world are spending the majority of their time working with others.

As organizations pivot to meet the changing needs of their employees, it's critical they understand how their employees are working. Office workers are engaging in a range of work behaviors that fundamentally require different workspaces to support them.

At the core of our ongoing Workplace Survey research efforts, we have defined a framework of "work modes" to understand the full spectrum of activities that define work today. These five work modes include working alone, working with others in-person, working with others virtually, learning and professional development, and socializing, networking, and connecting.

Employees across all nine countries in our study are engaging in all five work modes fairly consistently. We found that employees spend the majority of their workweek working with others (42%), both virtually (14%) and in-person (28%). However, there is a potential overlap between in-person and virtual work modes as hybrid meetings (requiring both in-person and virtual participants) consist of more than half of meetings held in the office.

Working alone, whether it involves independent tasks such as deep concentration, reading, or answering emails, comprises the second largest amount of time (35%). This percentage varies across countries, reaching a high of 41% in Canada and a low of 28% in Saudi Arabia and the Philippines.

KNOWLEDGE WORK IS ROOTED IN FIVE DIFFERENT WORK MODES.

Percentage of time respondents spend in each work mode in a typical workweek

GLOBAL AVERAGE

11% Learning
12% Socializing
35% Working alone

42% Working with others
28% Working with others in-person
14% Working with others virtually

CANADA
8%
9%
42% (27% | 15%)
41%

U.S.
12%
12%
42% (28% | 14%)
34%

MEXICO
9%
10%
45% (32% | 13%)
36%

UK
10%
11%
41% (25% | 16%)
38%

GERMANY
11%
11%
39% (23% | 16%)
39%

SAUDI ARABIA
14%
15%
43% (28% | 15%)
28%

UAE
14%
14%
43% (29% | 14%)
29%

PHILIPPINES
14%
14%
44% (31% | 13%)
28%

SINGAPORE
13%
14%
42% (26% | 16%)
31%

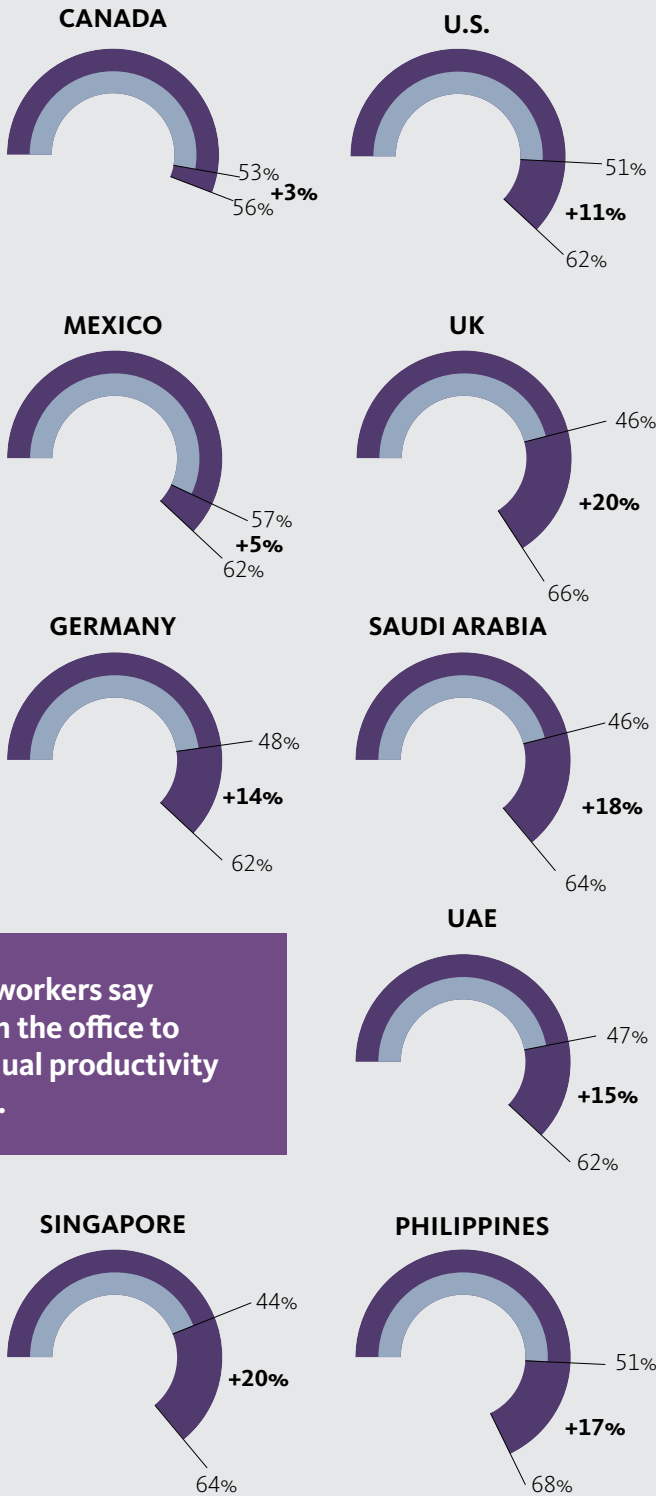# There is a gap between current office utilization and what employees say they need.

The workplace now plays a more intentional role than it has done before. The hybrid work model leverages the office to optimize effectiveness and experience. Employees recognize that the office still plays a critical role for their individual and team productivity, yet they are choosing to spend half of their week in alternative work locations, on average. We are starting to see a chasm between the actions of employees and what they say they need.

There is a global variance in how much time employees are spending in the office compared to the amount they report they ideally need in the office for their productivity. The gap is largest in countries outside North America. On average, workers report that they ideally need to come to the office 63% of a typical workweek. Employees currently coming into the office more than that report that they need to spend less time in the office for productivity, whereas those who are spending less than that in the office need it more. The sweet-spot spending time in the office to maximize productivity is between 58% and 68% of a typical workweek.

The majority of office workers say they need more time in the office to maximize their individual productivity and team productivity.

OFFICE WORKERS SAY THEY NEED TO SPEND MORE TIME IN THE OFFICE THAN THEY CURRENTLY DO TO MAXIMIZE THEIR PRODUCTIVITY.

Percentage of time workers currently spend in the office compared to the amount of time that they say they is needed to maximize their productivity.

CANADA
53%
56% **+3%**

U.S.
51%
+11%
62%

MEXICO
57%
+5%
62%

UK
46%
+20%
66%

GERMANY
48%
+14%
62%

SAUDI ARABIA
46%
+18%
64%

UAE
47%
+15%
62%

SINGAPORE
44%
+20%
64%

PHILIPPINES
51%
+17%
68%

THERE IS A SWEET-SPOT OF TIME SPENT IN THE OFFICE TO MAXIMIZE PRODUCTIVITY.

Percentage of time workers currently spend in the office compared to the amount of time that they say is needed to maximize their productivity in a typical workweek.

Days in office based on percentage of time working at the office during a typical week: 1 day (0-20%), 2 days (21-40%), 3 days (41-60%), 4 days (61-80%), 5 days (81-100%).

The sweet-spot of time needed in the office for productivity is between 58% to 68% of a typical workweek.

1 day | 2 day | 3 day | 4 day | 5 day

100% of workweek
96%
-28%
80%
72%
-8% 68%
64%
Ideal amount of time spent in office — 58%
62%
62%
+11%
60%
51%
40%
+31%
31%
+45%
20%
Current amount of time spent in office — 13%
0% of workweek

The workplace has not kept pace with the shift in employee needs.

Workplaces are consistently underperforming for critical work activities such as working alone and with others virtually.

In countries such as the UK and U.S., we have measured a gradual decline in the effectiveness of spaces to support working alone, while spaces for in-person work, learning, and socializing are more effective. Employees spend an average of 35% of their typical week working alone. They say it is critical to performing their job and that 73% of their time spent working alone requires a high level of concentration. Yet, across all countries, the workplace is not supporting this critical work mode.

A similar pattern is emerging for working with others virtually. We know that typically employees are spending the majority of their week working collaboratively virtually and in-person. Globally, respondents say that 57% of meetings in the office are hybrid, yet the workplace is consistently the least effective for supporting collaborative virtual working.

The most supportive workplaces have high effectiveness and experience scores—determined using quartile analysis of which the top quartile of scores are considered "high-performing." Those that have high effectiveness and experience scores have easier access to a diverse range of spaces that support critical work activities.

23% of respondents strongly agree that it's easy to access spaces for video conferencing in their office environment.

THE WORKPLACE IS UNDERPERFORMING FOR WORKING ALONE AND WITH OTHERS VIRTUALLY.

Rating of the effectiveness of the office environment to support each work mode (1=Not effective to 5=Very effective)

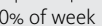**UK workers report the highest percentage (62%) of hybrid meetings in the office.**

Workers who say they need the office most are highly mobile.

To understand the amount of time office workers say they need the office for their productivity, we must first measure how they are working. We compared employees who say they need the office for more productivity against those who say they need it less—and there are remarkable differences in how they work. Employees who say they need the office most for their productivity are working in more innovative and higher-performing companies, they are more senior, more mobile, and they are likely to be working in industries such as media, sciences, and legal. For these employees, the office acts as an anchor point for productivity.

The need to come into the office to maximize productivity is also influenced by external factors such as policy and commute. A quarter of employees (26%) who report they need the office less have a mandate to come into the office five days per week, whereas just 13% of those who report that they need the office more have the same mandate.

People with longer commutes typically have a larger gap between their current office utilization and their ideal time needed to maximize productivity than those with commutes less than 30 minutes. This suggests that length of commute may be a barrier for the time needed to come into the office for productivity. It is important to consider where employees want to live. Since the pandemic, daily commuters report that living in a walkable neighborhood is more important to them than an easy commute to work, according to our annual City Pulse Survey in 2022.

WORKERS WHO NEED THE OFFICE MOST FOR PRODUCTIVITY WORK DIFFERENTLY FROM THOSE WHO NEED IT LESS.

Percentage of time in a typical week employees report they need in the office to maximize individual and team productivity. Effectiveness and Experience Scores are on a 100-point scale.

61% of respondents say they need to work from the office more for their productivity.

The group of employees who need the office more for their productivity tend to spend majority of their time working in locations outside the office.

Employees who need the office more typically spend 33% in the office but say they need an average of 68% for their productivity.

100% of week

78%

68%
Ideal amount of time spent in office

−26%

52%

+35%

33%
Current amount of time spent in office

0% of week

Employees who need the office more work in higher-performing workplaces

72 EFFECTIVENESS   74 EXPERIENCE

64 EFFECTIVENESS   65 EXPERIENCE

Employees who need the office less work in lower-performing workplaces

Time spent in office — 33% of workweek / 78% of workweek

Time spent at other locations — 32% / 6%

Time spent in third spaces — 8% / 1%

Time spent at home — 27% / 15%

34% of respondents say they need to work from the office less for their productivity.

Workers who need the workplace less for productivity work primarily from the office.

Those who need less time in the office currently spend 78% of time in the office but need 52% of time, on average.
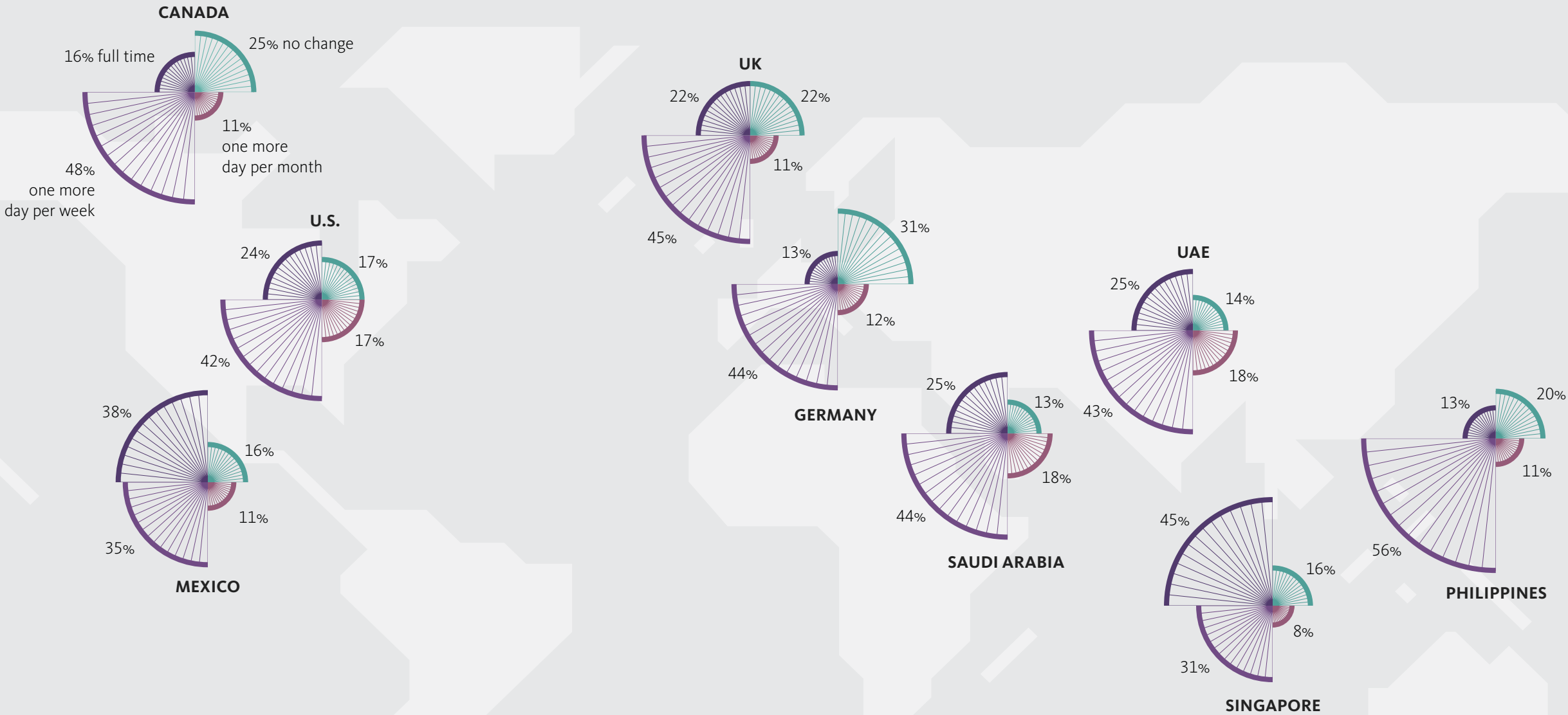
Employees are willing to come into the office more for their ideal mix of experiences.

Experience plays a fundamental role in making the office a more attractive place to work. We asked workers to create their ideal workplace experience using a mix of eight everyday experiences: coffee shop (work café), boutique hotel (hospitality-infused, amenity-rich spaces), library (quiet work areas), corporate (business-like), creative lab (tech-enabled spaces to experiment), residential (more like home), clubhouse (informal spaces for connection), and conference center (spaces to come together for group work). Respondents could allocate percentages the experiences that would make up their ideal mix.

The majority of employees who are working in the office less than 80% of a typical workweek they would be willing to come into the office more often for their ideal mix of experiences. Office workers in Singapore and Mexico report a higher willingness to return to the office full-time for the ideal mix of experiences, compared to one additional day per week for most workers across other countries. Younger employees such as Gen Z and younger Millennials are more willing to come into the office than their older colleagues for their ideal mix of experiences.

MOST EMPLOYEES ARE WILLING TO COME INTO THE OFFICE MORE OFTEN FOR THEIR IDEAL MIX OF EXPERIENCES.

If your organization provided your ideal work experience mix, would you be willing to come to your company's office more often? (Segmented by country)

CANADA
16% full time
25% no change
11% one more day per month
48% one more day per week

U.S.
24%
17%
42%
17%

MEXICO
38%
16%
35%
11%

UK
22%
22%
45%
11%

GERMANY
13%
31%
44%
12%

SAUDI ARABIA
25%
13%
44%
18%

UAE
25%
14%
43%
18%

PHILIPPINES
13%
20%
56%
11%

SINGAPORE
45%
16%
31%
8%

YOUNGER WORKERS ARE WILLING TO COME INTO THE OFFICE MORE OFTEN FOR THEIR IDEAL MIX OF EXPERIENCE.

If your organization provided your ideal work experience mix, would you be willing to come to your company's office more often? (Segmented by generation)

	No change	One more day per month	One more day per week	Full time back
Gen Z	16%	14%	43%	27%
Millennial (younger)	18%	12%	43%	27%
Millennial (older)	21%	12%	42%	25%
Gen X + Baby Boomer	26%	13%	39%	22%
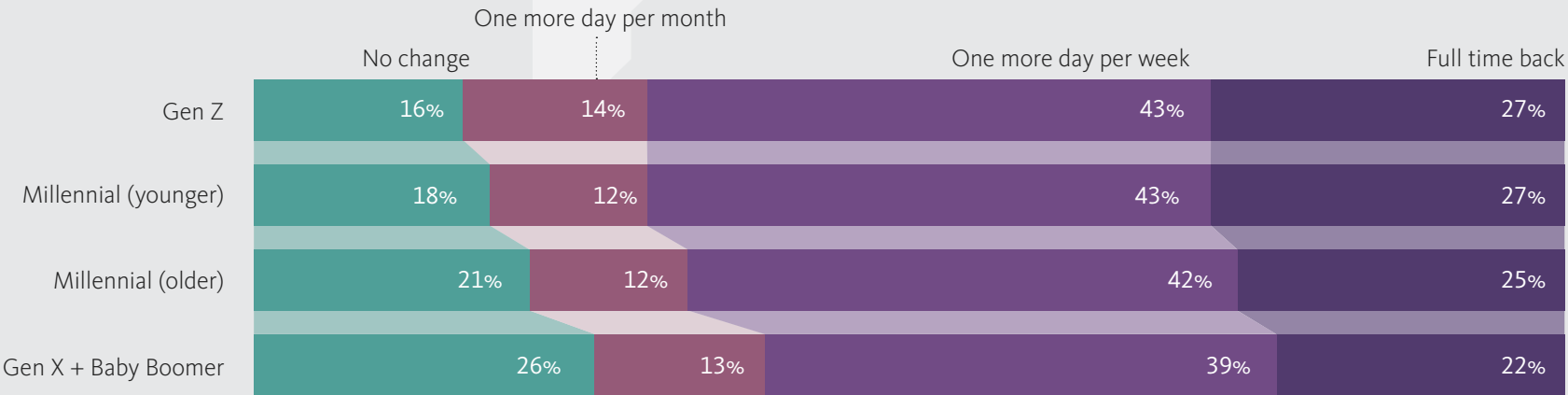
Workers have choice, but they don't have the choices they need.

The workplace must offer a more diverse array of spaces to be a destination of choice in the wider ecosystem of work. High-performing workplaces—those that score in the top quartile of space effectiveness and workplace experience scores—offer employees more choice of workspaces within the office.

We asked respondents which spaces they have access to beyond their individual workspace and enclosed meeting spaces. To identify those spaces with the highest impact on effectiveness and experience, we calculated the difference of scores for those who have that space and those who do not.

There are four space typologies that best support workplace effectiveness and experience:

- Quiet individual work: tech-free zones, focus rooms, and libraries
- Connect and recharge: work cafés, fitness areas, and break rooms
- Creative group work: innovation hubs, maker spaces, and project/war rooms
- Reflection and restoration areas: meditation, outdoor, and rest spaces

The most impactful combination for high-performing workspaces includes a mix of workspaces from each category.

On average, 73% of employees have choice in where they work within the office environment.

Employees across Middle Eastern countries surveyed have the most choice in where they work within the office.

EMPLOYEES REQUIRE A NEW BALANCE OF WORKSPACES TO DELIVER THE MOST IMPACT FOR EFFECTIVENESS AND EXPERIENCE.
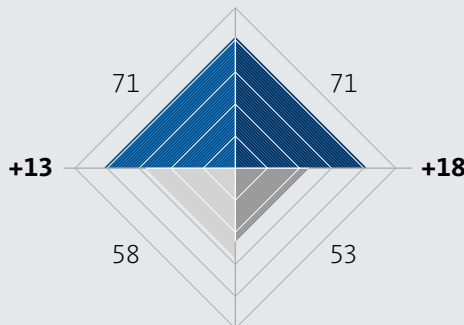
Effectiveness and Great Experience Score comparisons between those that have at least one workspace in each category and those who do not. Both scores are on a 100-point scale.
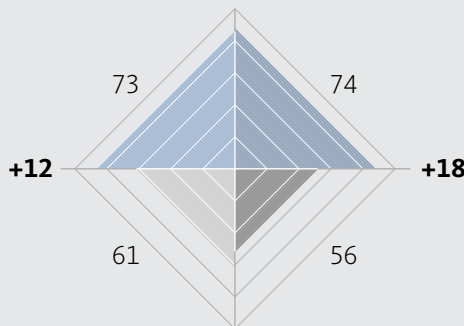
EFFECTIVENESS | GREAT EXPERIENCE

SPACES FOR CREATIVE GROUP WORK

73 | 74
+14 | +19
Have
Don't have
59 | 55
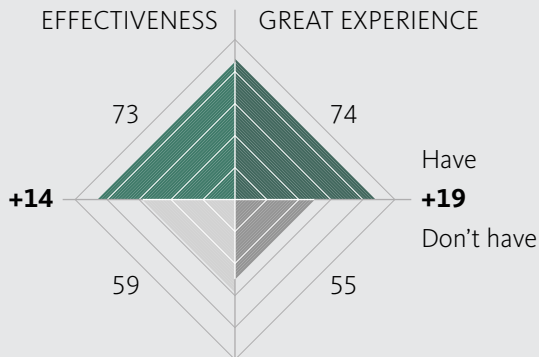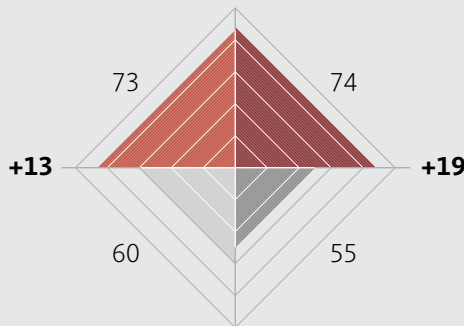
SPACES FOR INDIVIDUAL WORK

73 | 74
+13 | +19
60 | 55

SPACES TO CONNECT & RECHARGE

71 | 71
+13 | +18
58 | 53

SPACES TO REFLECT & RESTORE

73 | 74
+12 | +18
61 | 56

SPACES FOR CREATIVE GROUP WORK AND INDIVIDUAL WORK HAVE THE GREATEST IMPACT ON WORKPLACE EFFECTIVENESS AND EXPERIENCE.
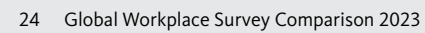
Difference in Effectiveness and Great Experience scores between respondents who have the workspace in their office and those who do not. Both scores are on a 100-point scale.

GREATEST VALUE	EFFECTIVENESS SCORE (50–80)	GREAT EXPERIENCE SCORE (50–80)
Innovation hub	Have / Don't have +11	+15
Quiet/tech-free zone	+10	+15
Maker space	+10	+14
Focus room	+10	+14
Reflection/meditation space	+10	+13
Outdoor workspace	+10	+15
Project/team room	+10	+14
Library	+10	+12
Work café	+9	+13
Rest/nap space	+9	+13
Fitness area	+9	+11
Break room/lounge	+7	+10
LEAST VALUE		
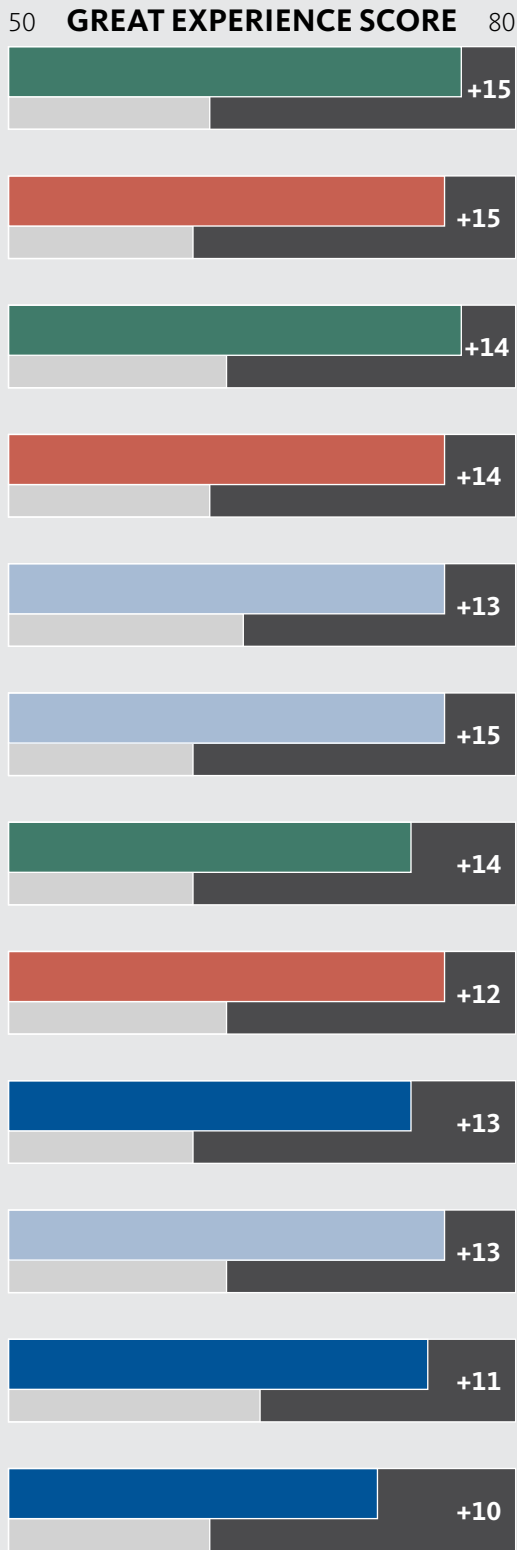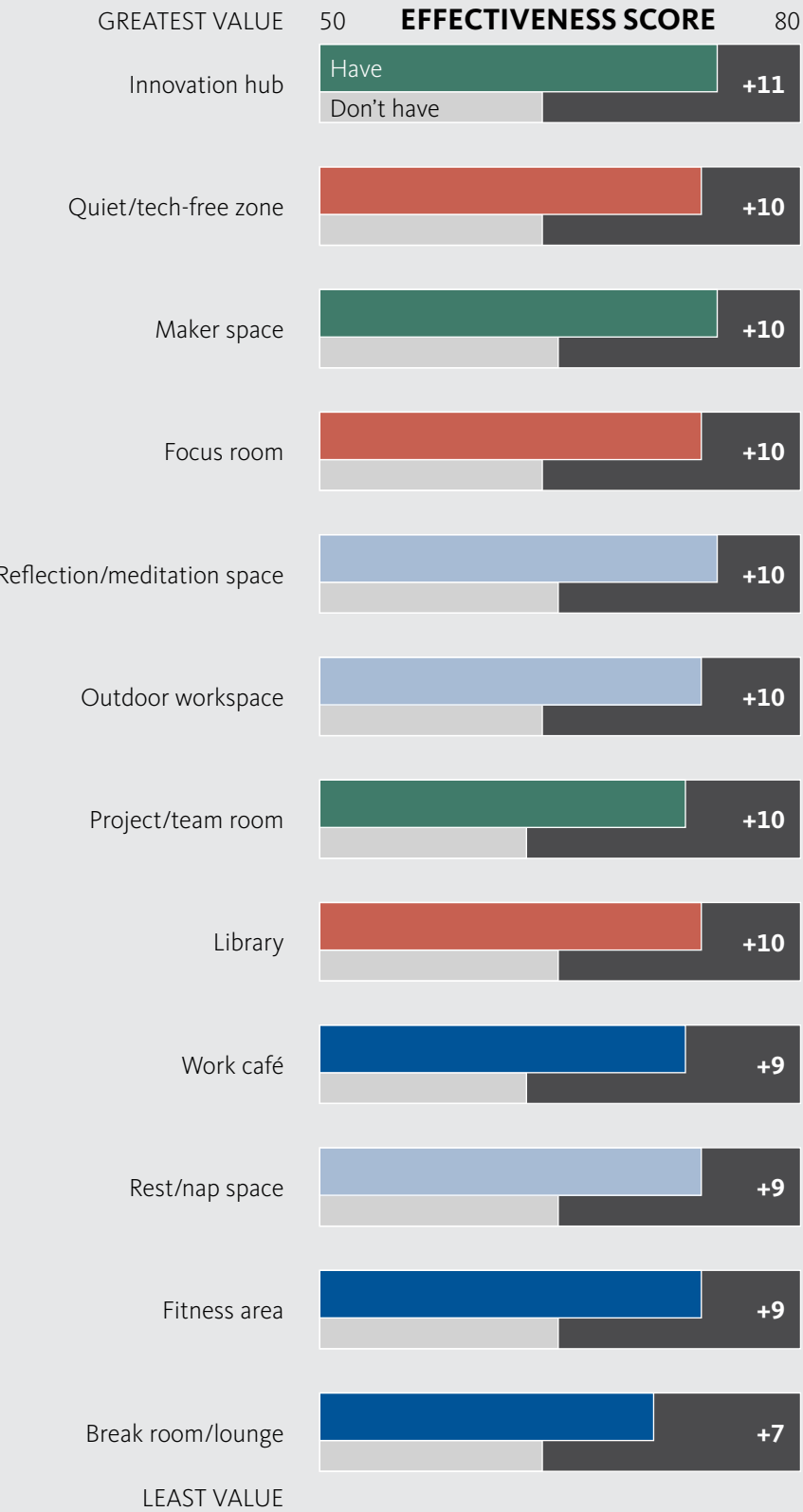
Higher-performing workplaces are located in amenity-rich neighborhoods.

Office location has never been more important. Workplaces that have high scores for workplace effectiveness and experience are often located in neighborhoods that offer a diverse array of workspaces and amenties either in the building, on campus, or nearby. The surrounding office area is an extension of the workplace ecosystem—providing greater choice for employees to work fluidly between the workplace and other locations throughout the day.

On average, the majority of employees are satisfied with where their office is located in terms of the amenities, public transport, outdoor space, neighborhood attractiveness and safety, and parking. Workplaces that have a diverse choice of amenities, services, and workspaces in and outside the office environment will become destinations of choice for employees.

HIGH-PERFORMING WORKPLACES HAVE GREATER CHOICE OF AMENITIES AND SERVICES IN AND AROUND THEIR WORKPLACE THAN THE AVERAGE WORKPLACE.

Percentage of respondents who have the listed amenities/services on-site or nearby their workplace/office building, comparing high-performing workplaces to the overall average.

67% of employees are satisfied with the public transportation in their office's neighborhood.

77% of respondents are satisfied with the amenities and services within their office's neighborhood.

Legend:
- Transportation
- Health and well-being
- Care services
- Green spaces
- Retail spaces
- Dining
- Civic space
- Personal care services
- Innovation spaces

High-performance workplaces have a significant return on investment for individual workers and the business.

High-performing workplaces have twice the impact on personal productivity than low-performing workplaces. Office environments that overlay functionality with a great workplace experience ultimately drive better individual, team, and organization outcomes. Employees in high-performing workplaces across all nine countries report that

working in their office positively impacts their personal productivity, awareness of critical intel, job satisfaction, career advancement, work/life balance, and personal health and well-being. Team outcomes such as sense of community, relationships with colleagues, connection to the company's mission, and team productivity are also heightened in high-

performing workplaces. Employees in the top quartile of workplaces recognize the impact of their office on business outcomes, citing that it positively impacts the quality of their team's services and speed of decision-making. Workers in high-performing workplaces are more engaged, more committed to their organization, more aware of work flows, have

better team relationships and a stronger sense of belonging. As organizations navigate their future workplace strategy, investment in high-performing workplaces could positively impact the business at all levels.

High-performing

Low-performing

INDIVIDUAL

TEAM

ORGANIZATION

Personal productivity — 94% / 45%
Awareness of critical intel — 92% / 48%
Job satisfaction — 93% / 39%
Career advancement — 92% / 38%
Work/life balance — 91% / 33%
Personal health & well-being — 91% / 33%

Sense of inclusion — 93% / 49%
Relationship with colleagues — 93% / 57%
Connection to mission/purpose — 93% / 41%
Team productivity — 93% / 48%

Quality of work & services — 94% / 47%
Speed of decision-making — 92% / 43%

HIGH-PERFORMING WORKPLACES POSITIVELY IMPACT INDIVIDUAL, TEAM, AND BUSINESS OUTCOMES.

Percentage of respondents who said that working in the office positively or very positively impacts each of the following outcomes, comparing high-performing and low-performing workplaces.
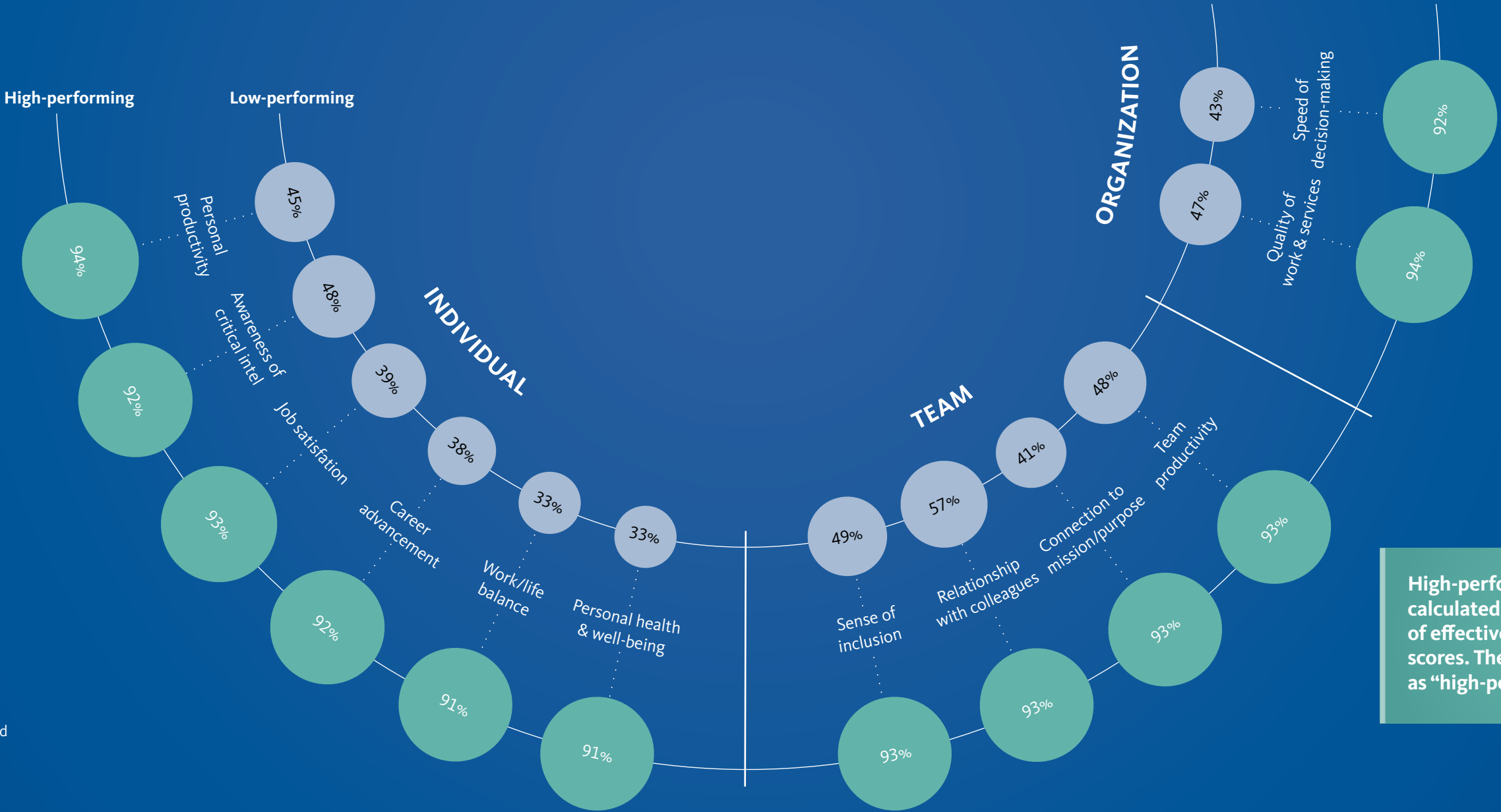
High-performing workplaces are calculated using quartile analysis of effectiveness and experience scores. The top quartile is defined as "high-performing."

What's next for the workplace?

The physical workplace is in a phase of experimentation as organizations pilot technologies, space types, and policies. This is one of the most exciting and challenging times in history for workplace design. This study reveals the fundamental layers to a high-performing workplace: space effectiveness and a great workplace experience must work in tandem to drive enterprise outcomes that ultimately lead to stronger business performance. There are three core considerations for the workplace of the future:

1. Work is different—it's time for the workplace to respond. As work continues to evolve, the workplace needs to keep pace. Employees have higher expectations for purpose-driven workspaces that support their work behaviors and offer their desired experiences. The workplace needs to proactively respond by providing access to critical workspaces that employees value and support how they work best.

2. Workers need the office for productivity—design it as a destination of choice. The office is an important part of the workplace ecosystem, but it needs critical changes to become a destination of choice. To achieve this, workplaces must move beyond just functionality. Great experiences drive willingness to come into the office. Ultimately, employees need a range of effective workspaces that are overlayed with people-centric workplace experiences.

3. Employees require a balanced array of workspaces and experiences—provide the spaces they need. The future workplace must first include a variety of spaces where employees can effectively get their work done. The best workplaces will also offer diverse and adaptable spaces where employees can self-curate their desired individual workplace experiences. This approach extends beyond the office. Organizations should be located in active, walkable neighborhoods that provide a rich collection of spaces as an extension of their own office environment. Organizations that firmly embed their workplaces in the workplace ecosystem will provide a strong framework for how their people can embrace a hybrid future of work.

SPACE EFFECTIVENESS → WORKPLACE EXPERIENCE → ENTERPRISE OUTCOMES → BUSINESS PERFORMANCE

Adobe Founders Tower, San Jose, California

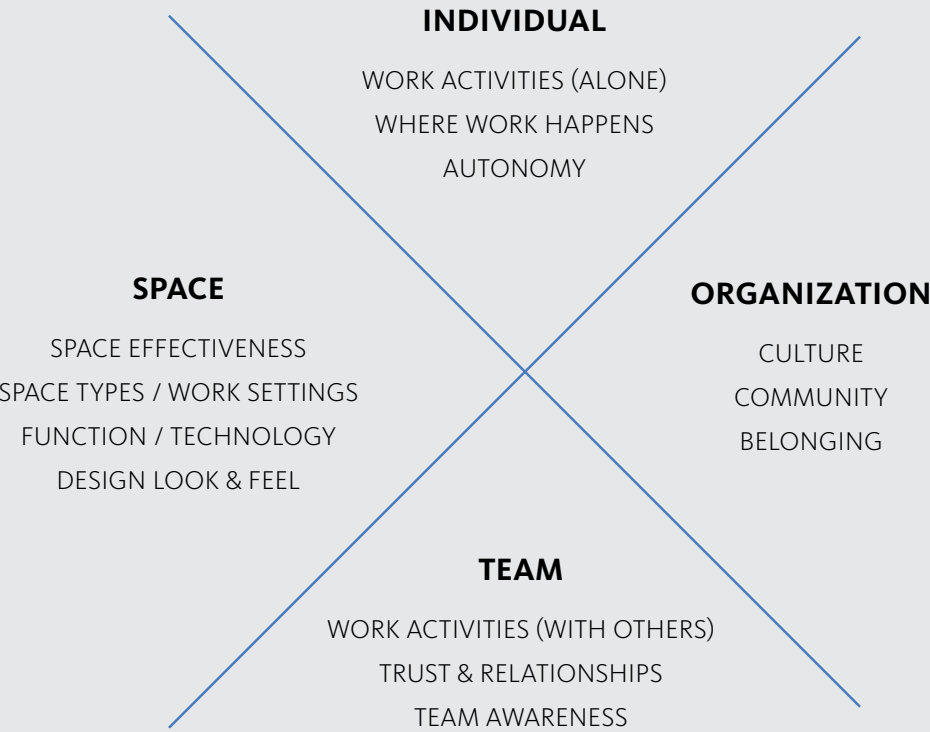# Applied Research Tools: the WPIx^{SM}

The WPIx is an online diagnostic tool to measure workplace performance and employee experience. Based on Gensler's global Workplace Survey research, it was created to address unique client needs through a customizable survey platform, an engaging user experience, and powerful reporting tools that can scale to measure everything from the performance of a single office to multiple sites across a global real estate portfolio. The WPIx survey design, and benchmark data points are updated annually from the Gensler Research Institute's workplace research. Rigorous research and sampling methods assure a survey that addresses up-to-date issues, and unbiased survey benchmark data you can trust. The WPIx can be used for workplace design and strategy projects, for pre-post evaluation, and for portfolio-level analyses.

This time-efficient survey gathers employee input on work activities, space effectiveness, hybrid work activities and locations, and overall workplace experience—analyzing and reporting insights that measure design impact and inform design decisions. The report identifies how and where people work and measures the effectiveness of the spaces used to support five work modes. It also includes our powerful and extensively validated Workplace Performance Index® for benchmarking client scores against the independently collected data from our global research database. The WPIx offers optional question modules to assess enterprise outcomes such as workplace support for engagement, organizational commitment, innovation, and well-being. The WPIx is the ideal discovery tool to give all employees a voice in how they work and what they value about the workplace.
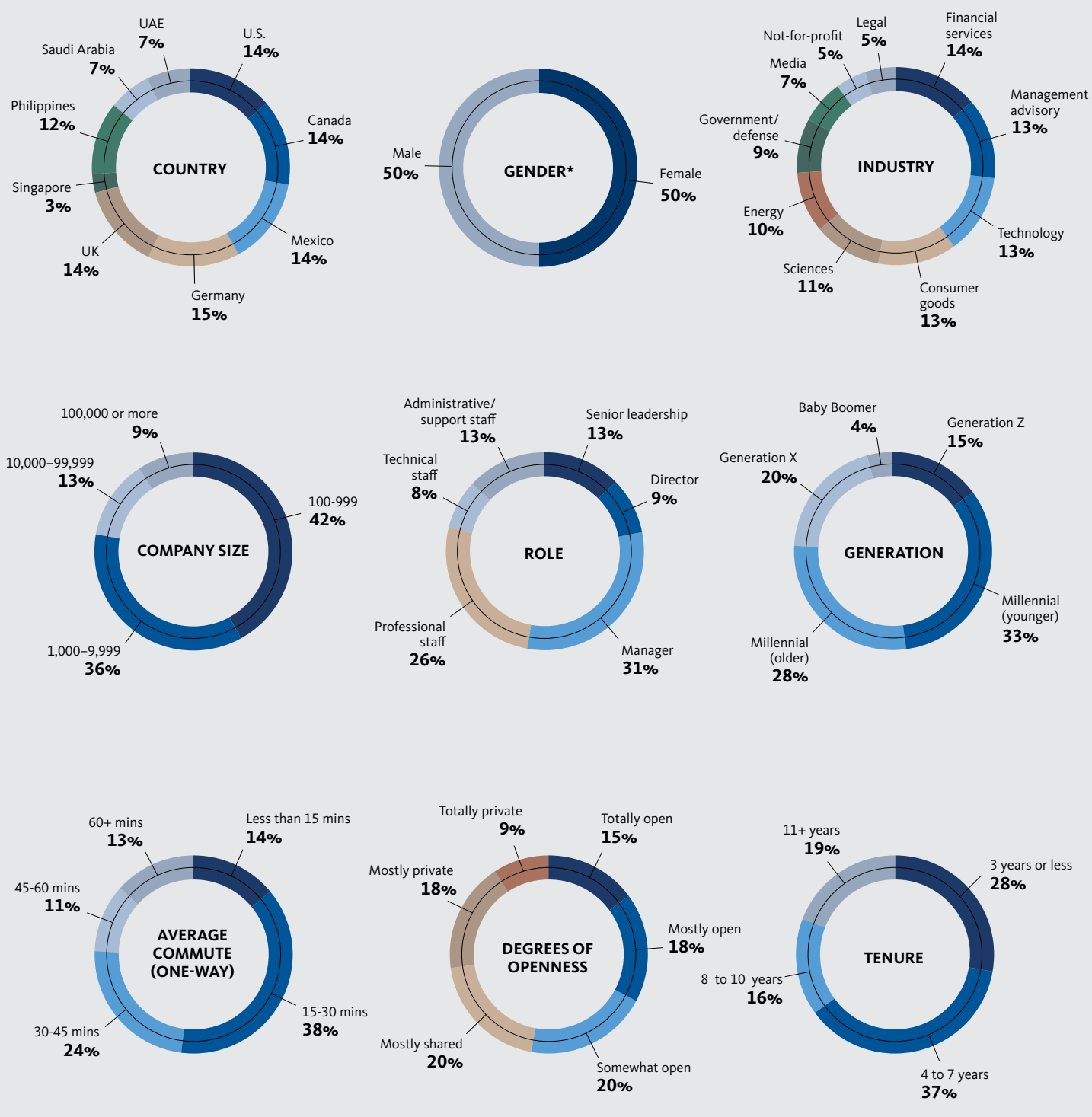
95 million
data points

60+
countries

18
languages

INDIVIDUAL
WORK ACTIVITIES (ALONE)
WHERE WORK HAPPENS
AUTONOMY

SPACE
SPACE EFFECTIVENESS
SPACE TYPES / WORK SETTINGS
FUNCTION / TECHNOLOGY
DESIGN LOOK & FEEL

ORGANIZATION
CULTURE
COMMUNITY
BELONGING

TEAM
WORK ACTIVITIES (WITH OTHERS)
TRUST & RELATIONSHIPS
TEAM AWARENESS

Sample Descriptions

COUNTRY
UAE 7%
U.S. 14%
Saudi Arabia 7%
Canada 14%
Philippines 12%
Mexico 14%
Singapore 3%
Germany 15%
UK 14%

GENDER*
Male 50%
Female 50%

INDUSTRY
Legal 5%
Financial services 14%
Not-for-profit 5%
Media 7%
Management advisory 13%
Government/ defense 9%
Technology 13%
Energy 10%
Consumer goods 13%
Sciences 11%

COMPANY SIZE
100,000 or more 9%
10,000–99,999 13%
100-999 42%
1,000–9,999 36%

ROLE
Administrative/ support staff 13%
Senior leadership 13%
Technical staff 8%
Director 9%
Professional staff 26%
Manager 31%

GENERATION
Baby Boomer 4%
Generation Z 15%
Generation X 20%
Millennial (younger) 33%
Millennial (older) 28%

AVERAGE COMMUTE (ONE-WAY)
60+ mins 13%
Less than 15 mins 14%
45-60 mins 11%
15-30 mins 38%
30-45 mins 24%

DEGREES OF OPENNESS
Totally private 9%
Totally open 15%
Mostly private 18%
Mostly open 18%
Mostly shared 20%
Somewhat open 20%

TENURE
11+ years 19%
3 years or less 28%
8 to 10 years 16%
4 to 7 years 37%

*Other disclosed identities captured including transgender (0.1%), gender non-confirming/non-binary (0.1%), and not disclosed gender identity (0.1%) did not exceed one percent.

Methodology

Overview

The Gensler Research Institute deployed an online survey to an anonymous panel of 14,000 office workers across two waves in a repeated cross-sectional study. In the first wave, fielded between June 14 and September 11, 2022, respondents were required to be located in the U.S., Mexico, or Canada. In the second wave, collected between November 3 and December 26, 2022, respondents were required to be located in Germany, the UK, UAE, Saudi Arabia, Singapore, or the Philippines. The survey was deployed using a third-party panel provider. Survey respondents were required to be employed full-time, to work from an office environment at least some of the time, and to work for a company, organization, or firm of at least 100 employees at the time of data collection, excluding fully remote workers and those working in companies of less than 100 employees.

Sampling

Respondents were recruited by Qualtrics (a third-party research platform and provider), with whom we worked to ensure balanced distributions across up to 10 client industries and representation of a broad cross-section of seniority levels, roles, ages, and geographies. Not all client industries were included for all countries surveyed (see Appendix). The survey could be taken in English, French (Canada), Spanish (Latin America), German (Germany), and Arabic (UAE, Saudi Arabia, and Kuwait*). We embedded multiple checks in the survey, including bot detection, speeder logic, and attention filters, to manage response validity.

*Only 73 respondents were gathered for Kuwait, these responses were excluded from the country-level comparisons but included in the "global average."

Survey Content

All survey respondents in both waves answered questions regarding their general workplace behaviors, experiences, and needs for the physical work environment, as well as ratings of effectiveness, functional features, service and amenity offerings, technology, and neighborhood-level attributes. Respondents were anonymous to Gensler, and the workplaces and office spaces that were evaluated are not necessarily designed by Gensler.

Analysis

Multiple statistical procedures were used to analyze the data. Hypothesis testing was largely conducted through comparisons of results and measures of association, used to assess the direction, magnitude, as well as statistical and practical significance of relationships between two or more groups. Quartile analysis was used to segment key performance indicator groups. Methods of analysis included, but were not limited to, analysis of variance (ANOVA) and t-tests to compare group means and chi-square, Phi, Cramer's V, and Somers' d tests for categorical variables.

Constructs reflective of workplace performance, workplace experience, innovation, engagement, team relationships, awareness of workflows, and effectiveness were identified, and the internal reliabilities of their items were tested using Cronbach's Alpha (α) and Composite Reliability. Constructs with sufficient reliability and inter-item correlations were created into composite variables used in subsequent analyses.

Glossary of Terms

Collectivistic v Individualistic Countries

Collectivistic and Individualistic countries were identified using the Hofstede Insights ranking.

Current Time Spent

The percentage of time spent working at the office during a typical workweek, at the time of the survey.

Ideal Mix of Experiences

Experience Mix: In our study, we described eight different experiences, including clubhouse, boutique hotel, coffee shop, residential, library, conference center, creative lab, and corporate, and asked respondents, "Which of these options best describes the experience you would prefer from your work environment?" Respondents could move a toggle under each to create a pie chart of their ideal mix, adding up to 100%.

Willingness to come to the office if the ideal Mix is provided: For respondents coming into the office less than 80% of the time, we asked them, "If your ideal mix was provided, would you be willing to come to your company's office more often?"

Margin of Error

The margin of error for the sample is +/-3%. In interpreting the survey results, it is important to note that all sample surveys are subject to possible sampling errors. The results of a survey may differ from the results that would be obtained if the entire population were interviewed. The size of the sampling error depends upon both the total number of respondents in the survey and the percentage distribution of the responses to a particular question.

Statistical Significance

The determination of whether an observed result is probably real or due to chance. A primary way one can determine the presence of statistical significance is by referring to the test result's p-value. Generally, the smaller the p-value, the more likely the result is real and not due to

chance. The general significance level (the p-value cutoff) used in this study was α = 0.005. When working with large sample sizes (like the ones in this study), very small differences between groups, even if statistically significant, are often meaningless. Therefore, it was essential that we also examined effect size (magnitude or strength of relationships) in addition to p-value when interpreting test results.

Time Spent Needed to Maximize Productivity

The percentage of time spent needed to maximize productivity is based on the difference in the percentage of time respondents work from the office during a typical workweek compared to the percentage of time they need to be working from the office to maximize their individual and team's productivity. The "gap" is the difference between the two percentages of time, as a percentage of the typical workweek.

Work Modes

Gensler's five work modes were first introduced in 2008. Since then, the work modes have slightly evolved to reflect how work has evolved to working alone, working with others in-person, working with others virtually, learning/professional development, and socializing (networking and connecting with colleagues).

High-Performing Workplaces

By segmenting a composite score of workplace performance and workplace experience into quartiles, we differentiate between high-performing and low performing workplaces, reflective of both space effectiveness and a great workplace experience. Across the global sample, top quartile scores range from 82–100, while bottom quartile scores range from 2–60, on a 100-pt scale.

Global Averages

The "Global Average" reflects the overall average for all the countries where the survey was conducted. This is not adjusted to the population size of each country and is not intended to.

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