



Steelcase

The New Era of Hybrid Work

It's Time to Give People What They Want

Global Report

February 2022

About Our Research

Since the onset of the pandemic in March 2020, Steelcase has conducted 12+ global studies with over 57,000 employees and business leaders to understand the impact it's had on how and where people and organizations will work in the future.

This issue shares the insights from a global study designed to measure the current mindset of office workers and investigates their experiences, needs and expectations for working at the office and at home. **The latest quantitative study was conducted in the fall of 2021 in 11 countries and included 4,986 participants.**

Steelcase is committed to ongoing research to understand how work and the office is shifting during this time of rapid change to help people do their best work by creating places that work better. To stay connected to our research and insights visit steelcase.com/subscribe.

12+

Studies

11

Countries

57,000

Employees and Leaders

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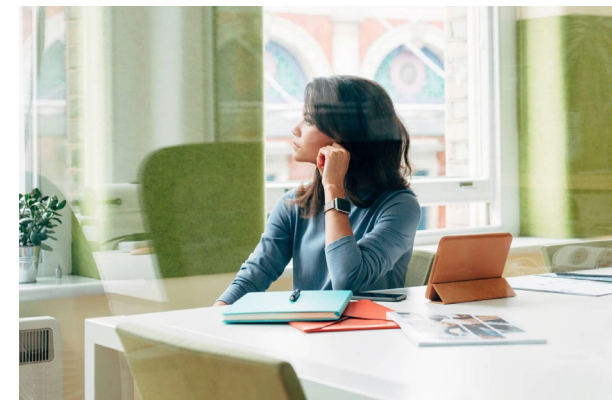
The Trust Crisis

Organizations around the world are facing crucial challenges and uncertainty on multiple fronts. The talent crisis and eroding trust are two critical issues they will need to solve to successfully compete in today's complex business environment. The labor market is hot and people are quitting in record numbers. And it's not just for more money. During the pandemic, there's been a major shift in employee expectations and people are re-evaluating their lives — both personally and professionally. Whether you call it The Great Resignation, The Great Reshuffle, The Great Reckoning or The Great Recognition, leaders are struggling with what to do to attract and retain talent.

The change in employee expectations and shift in values have also led to an increase in employee activism. People no longer just want a job. They want and expect to work for a company that shares their values and beliefs and they're not just concerned about themselves — they're concerned about the big picture and the sociopolitical stance of the company. As a result, the voice of the employee has never been louder or had a greater impact.

At the same time, organizations are experiencing what The Atlantic has dubbed a "trust recession." Trust is eroding among colleagues as a result of the physical separation they have experienced over the past two years. A recent study of more than 5,400 Finnish workers found "the longer employees were apart from one another during the pandemic, the more their faith in colleagues fell." People begin to question their colleagues' competence and character.

Eroding trust is exacerbating the talent crisis. Leaders need to "work to rebuild and maintain trusting relationships — with and among their employees," writes The Harvard Business Review. "Those that don't risk far more than lower morale. The chances of increased attrition, lower productivity and stalled innovation also loom large when trust plummets."



What people really want is to feel valued and feel a sense of belonging to their organization.



Leaders are trying to do the right thing. They're raising salaries and benefits, offering signing bonuses and shifting to hybrid work models to give people more flexibility. Yet, according to research from McKinsey, these choices can create a transactional relationship with employees, and may not provide what people really want: to feel valued and feel a sense of belonging to their organization.

This newest installment of Steelcase research conducted with employees around the world uncovers how the office can help. The office can be a vehicle for communicating values and creating a community at work where people feel they belong. The workplace is the body language of an organization and it speaks volumes about the culture and what's important to

leaders. This study shows how important the office is to people, what workers need in this new reality and **how the places people work can be a crucial part of an organization's strategy to solve the complex issues leaders face today.**

Offering remote work and higher salaries are important steps, but they're not enough to create a systemic and sustainable difference. Leaders must also address the impact the work experience and the workplace can have to meet new employee needs and build a more resilient organization that can thrive in an era of change and uncertainty.



What People Need and Expect Now

Last year, Steelcase research revealed people want a dramatically different and better work experience and identified five critical employee needs that, when addressed, will improve how they feel about their company:

Belonging

a sense of community, trust and shared purpose

Control

more choice and control over where, when and how they work

Productivity

support in-office and remote workers more equally to focus, collaborate and build relationships

Comfort

places to rejuvenate and support wellbeing

Safety

be and feel physically and psychologically safe

This research continues to reinforce people's needs and helps pinpoint actions organizations can take to leverage their office, not just as a place to do work, but as an asset that helps solve many of the thorny issues they face today.

The research reaffirms the importance of the office and reveals whether people like or dislike their office makes a difference: People who like working from their office are significantly more engaged and productive, connected to their company's culture and less likely to leave.



Key Findings

This new research reaffirms the importance of the office and reveals three key findings.

By addressing these findings, organizations have an opportunity to focus on the things that really matter, and make changes to their workplaces that will have the greatest impact on their people and their business.

Key Finding #1

The office plays a crucial role in how people relate to their organization — when people like working from their office they are more:

- Engaged
- Productive
- Connected to culture
- Likely to stay

Key Finding #2

People are willing to trade remote workdays for their own workspace in the office — while they want the autonomy and flexibility of hybrid work, people are looking for choice and control and a sense of belonging.

Key Finding #3

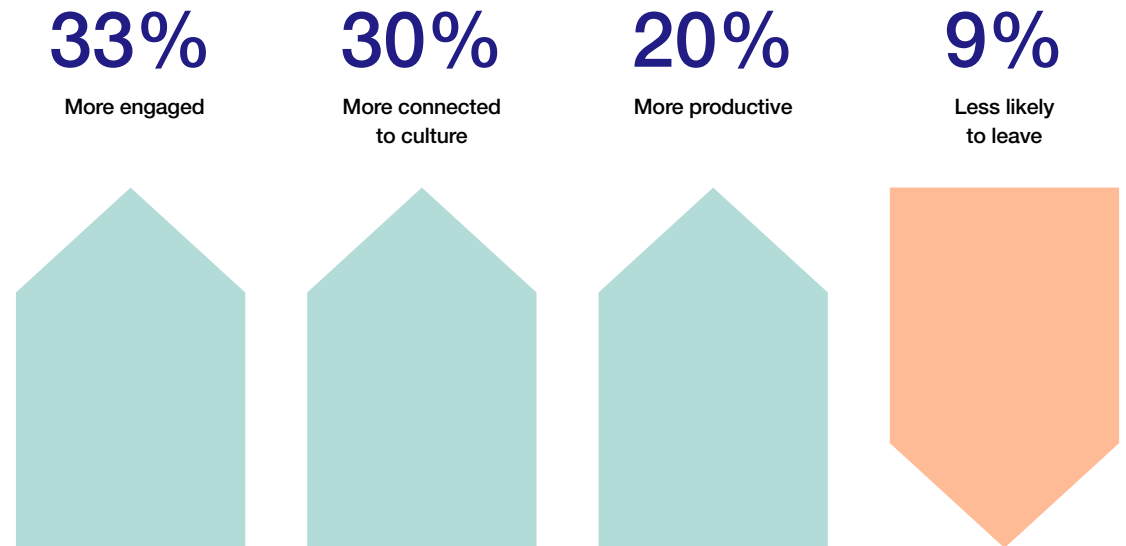
Access to private spaces is more important than ever. Contrary to the headlines, people want their office to help them collaborate and focus.

Key Finding #1

When people like working from their office, they are more engaged, connected to the organization’s culture, productive and likely to stay.

Steelcase researchers analyzed a wide range of factors that could influence important employee outcomes such as engagement, productivity, feeling connected to the company culture and retention. They looked at things many organizations are addressing now such as income and offering hybrid work. They also included other factors such as commute, tenure with the company and size of the company. The factor that most impacted engagement, productivity and feeling connected to the culture is, perhaps unexpectedly, when people like working from the office. Employee retention is most influenced by their tenure with the organization — followed by whether they like working in the office.

People who like working from their office are:



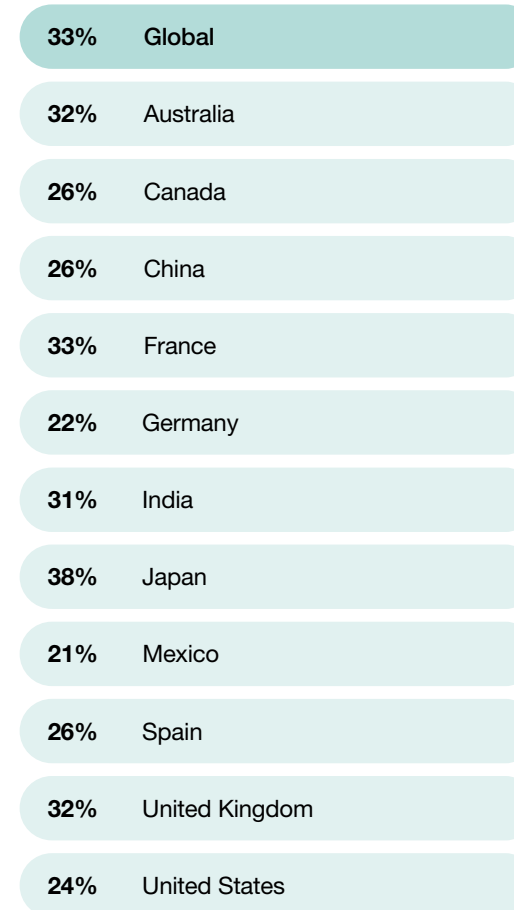
Key Finding #1

Impact to Engagement and Productivity

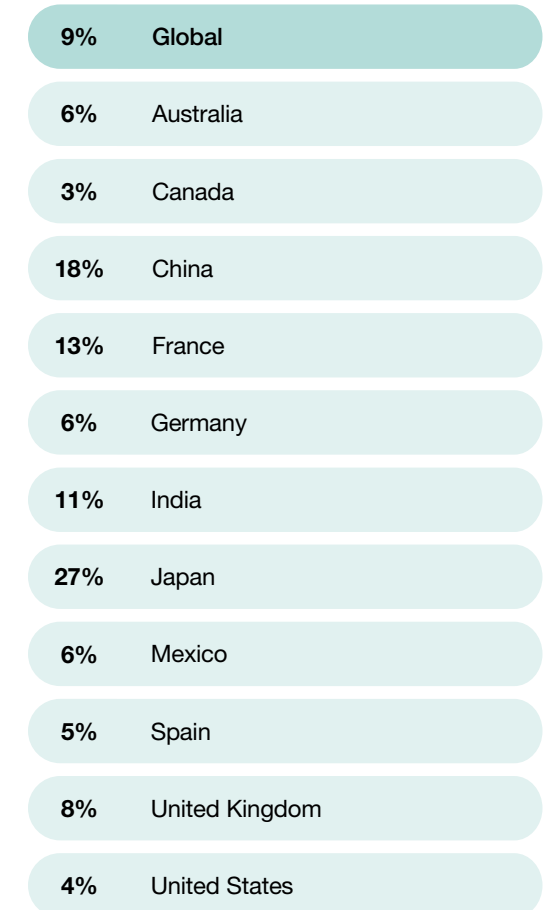
In all 11 countries studied, people are more engaged and productive if they like working from their office. Some of the most significant impacts to engagement are in Japan and France. And those in Japan, China and France saw the biggest impacts to productivity.

People who like working from their office are:

More Engaged



More Productive



Key Finding #1

Impact to Connection to Culture and Retention

In all 11 countries studied, people are more connected to company culture and less likely to leave if they like working from their office. Some of the most significant impacts to culture are in China, Japan and France. And those in the UK, France, Germany and Spain were significantly less likely to leave than the global average if they liked working from their office.

People who like working from their office are:

More Connected to Culture

30% Global

29% Australia

22% Canada

51% China

35% France

19% Germany

26% India

42% Japan

20% Mexico

26% Spain

29% United Kingdom

29% United States

Less Likely to Leave

20% Global

20% Australia

16% Canada

24% China

27% France

26% Germany

19% India

19% Japan

2% Mexico

25% Spain

27% United Kingdom

10% United States

Key Finding #1

Office or Home?

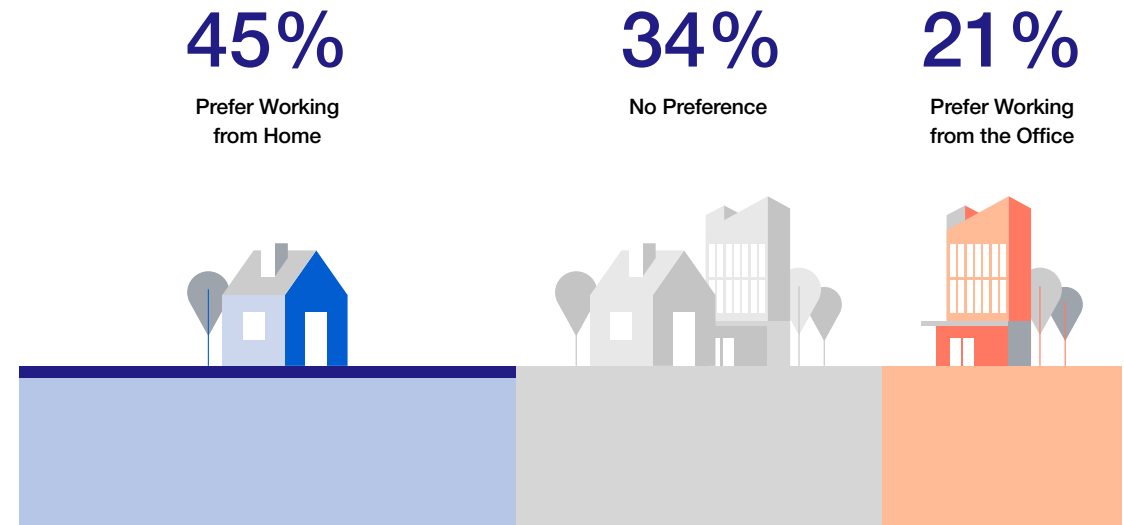
Nearly all employees (87%) will spend at least some of their week working from the office, so whether or not they like being there can have a substantial impact. But Steelcase researchers found that more employees say they prefer working from home than the office.

If organizations could improve the office experience, shift perceptions of people with no preference and win over some of the people who currently prefer home, it could offer a return on investment in terms of increased engagement, productivity, connection to the organization and employee retention.

Simply letting people who say they prefer to work from home do so even more carries risk. The lack of physical presence in the office hurts retention and organizational connection. People who prefer to work remotely more than two days per week are significantly more likely to say they will leave their company in the next six months. Those that prefer to work from home permanently also have lower scores for engagement and culture. Although their productivity does not suffer, this lack of physical connection is leading to an overall disconnection from the organization.

By changing the work environment and giving people more of what they need and expect, organizations can create a better work experience and improve these outcomes.

Where people prefer to work



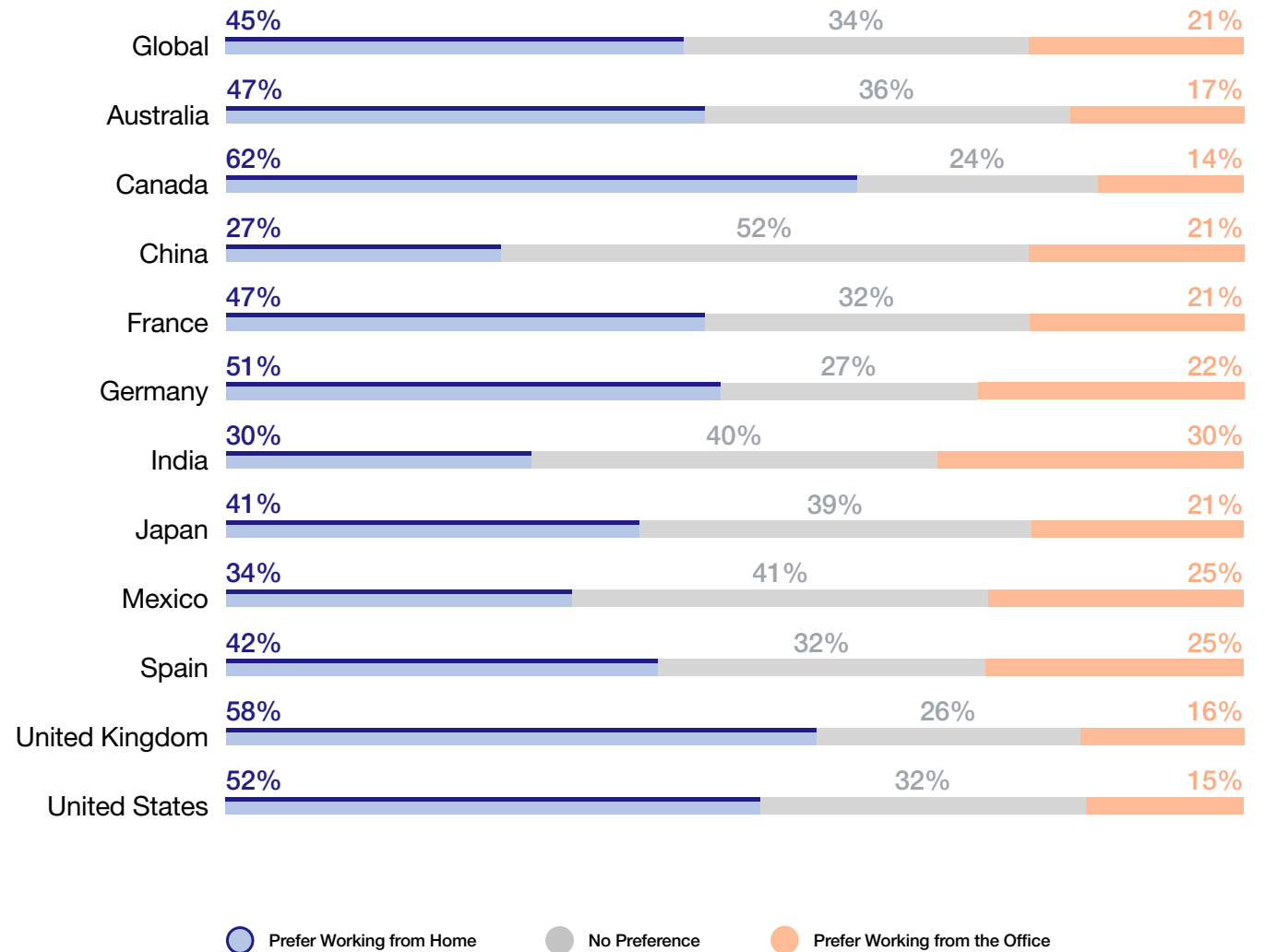
Key Finding #1

Office or Home?

In every country studied, more people prefer to work from home than the office. A significant percentage of people have no preference — which signals a significant opportunity for organizations to shift perceptions if they improve the office experience.

Noteworthy: Canadians prefer to work at home the most, while only 27% of people in China and 30% in India prefer to work at home. Only 14% of Americans and 15% of Canadians prefer to work from the office more.

Where people prefer to work



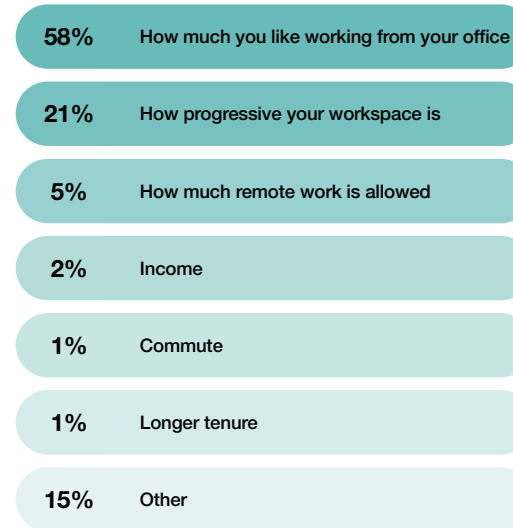
Key Finding #1

Factors Impacting Employee Behaviors

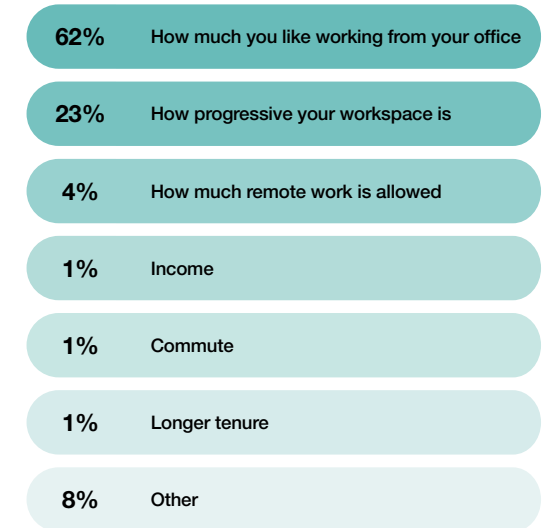
How much people like working from their office has the greatest impact on employee engagement, productivity and how connected people feel to their company’s culture. It is second to tenure for employee retention. It ranked significantly higher than factors like income and remote work.

Noteworthy: To determine engagement, productivity and connection to culture, researchers used index scores which measure multiple, proven dimensions of each outcome. They then compared dozens of factors to those outcomes to determine which factors most significantly impact outcome scores. Retention was a single question, but was analyzed in the same way as all other outcomes.

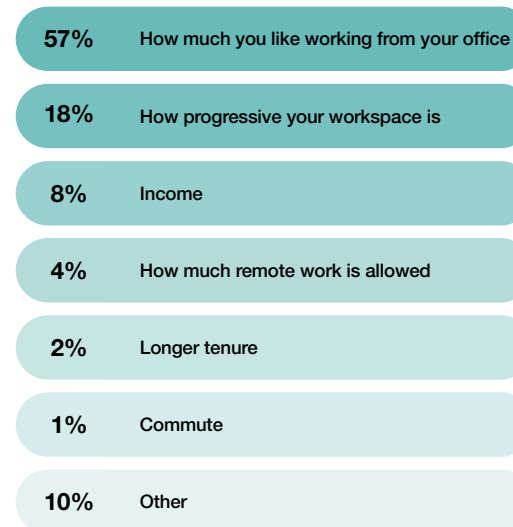
Engagement



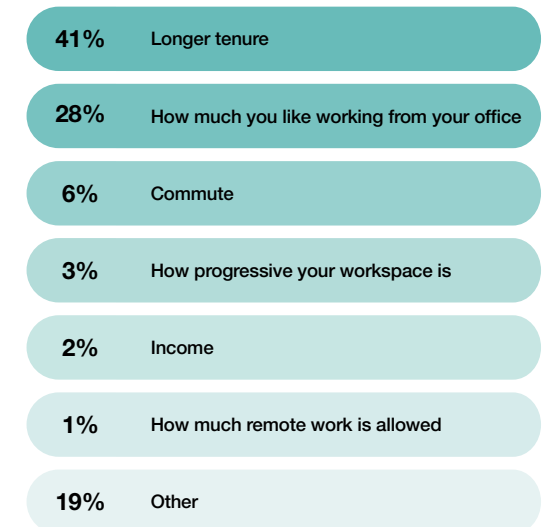
Connection to Culture



Productivity



Retention

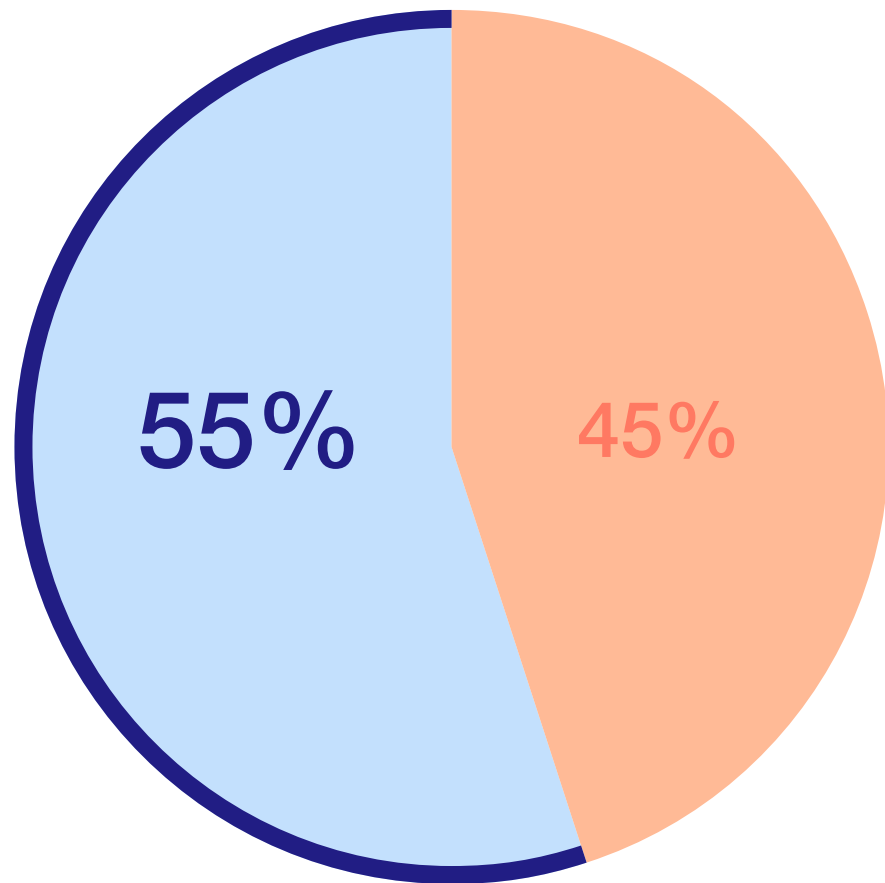


Key Finding #2

People are willing to trade remote workdays for their own workspace at the office. While they want the autonomy and flexibility of hybrid work, people are looking for choice and control and a sense of belonging.

Organizations are responding to people's desire for flexibility and privacy by offering a range of hybrid work options, which can offer a level of autonomy many people hadn't experienced before the pandemic — 42% never worked from home and 20% did so occasionally. But hybrid work options alone don't address employees' overall needs. In fact, people are willing to trade remote workdays for more privacy, comfort and control within the office. When asked to choose, more people said they'd prefer to have an assigned desk in the office and fewer days working from home.

People are more likely to choose an assigned workspace over more remote workdays.



Assigned workspace +
WFH ≤ 2 days a week

No assigned workspace +
WFH ≥ 3 days a week

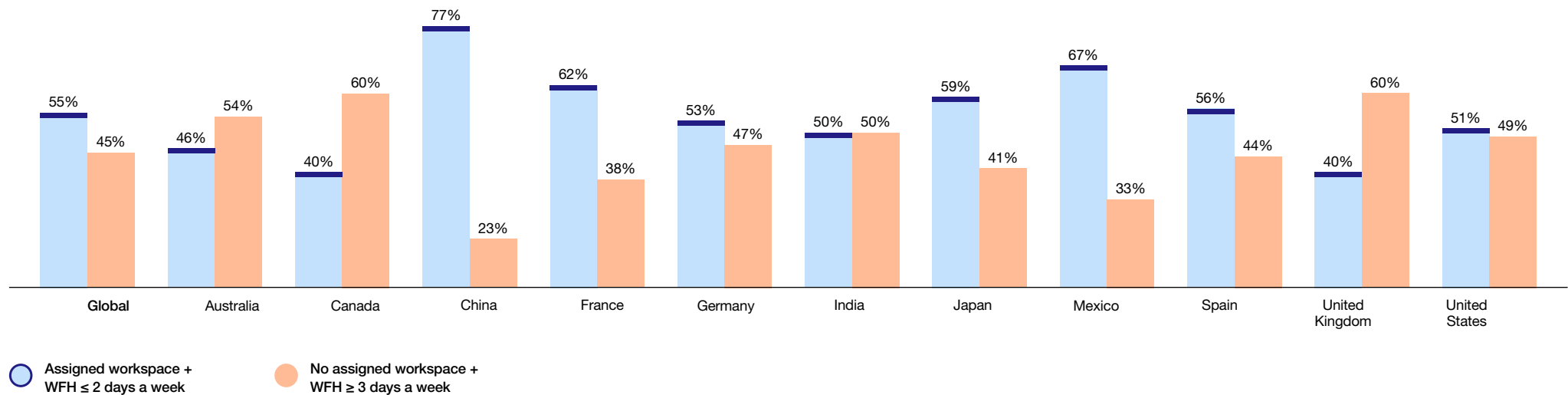
Key Finding #2

Which Would You Choose: Assigned Desk or Remote Work?

Employees' desire for an assigned workspace is probably surprising news for organizations who thought they were giving people what they want by offering more hybrid options. But having a place to call home within the office signals to people they belong and also gives them the latitude to personalize the space and make it their own, which is more important than many leaders realize.

Noteworthy: Of the 11 countries surveyed, only workers in Australia, Canada and the UK prefer more work from home over an assigned workspace.

More people want an assigned workspace in the office



Key Finding #2

Desire for an Assigned Workspace

Well before the pandemic hit, the open plan office was getting a lot of debate. Inspired by the exceptionally open spaces favored by tech startups and intended to promote collaboration and innovation, many organizations embraced the open plan for its efficient use of real estate. As workers became more mobile, companies experimented with increasingly unassigned spaces.

Yet the trend toward open offices got pushback from employees who felt overexposed and struggled to concentrate. Those who no longer had their own desk sometimes found it freeing to work anywhere, but also felt unsettled if they didn't have a clear place to call home in the office. Then, the pandemic hit. Large numbers of office workers were required to work from home. And for many, the experience wasn't all bad. Early Steelcase research found that the top thing people disliked was isolation, but they liked skipping the commute. As people adjusted, many felt a greater sense of control over their work experience at home (although that experience wasn't equal for everyone. See [The Hidden Bias of Working from Home](#)). The majority of people globally (70%) have a dedicated workspace at home.



70%

of people have a dedicated workspace at home



51%

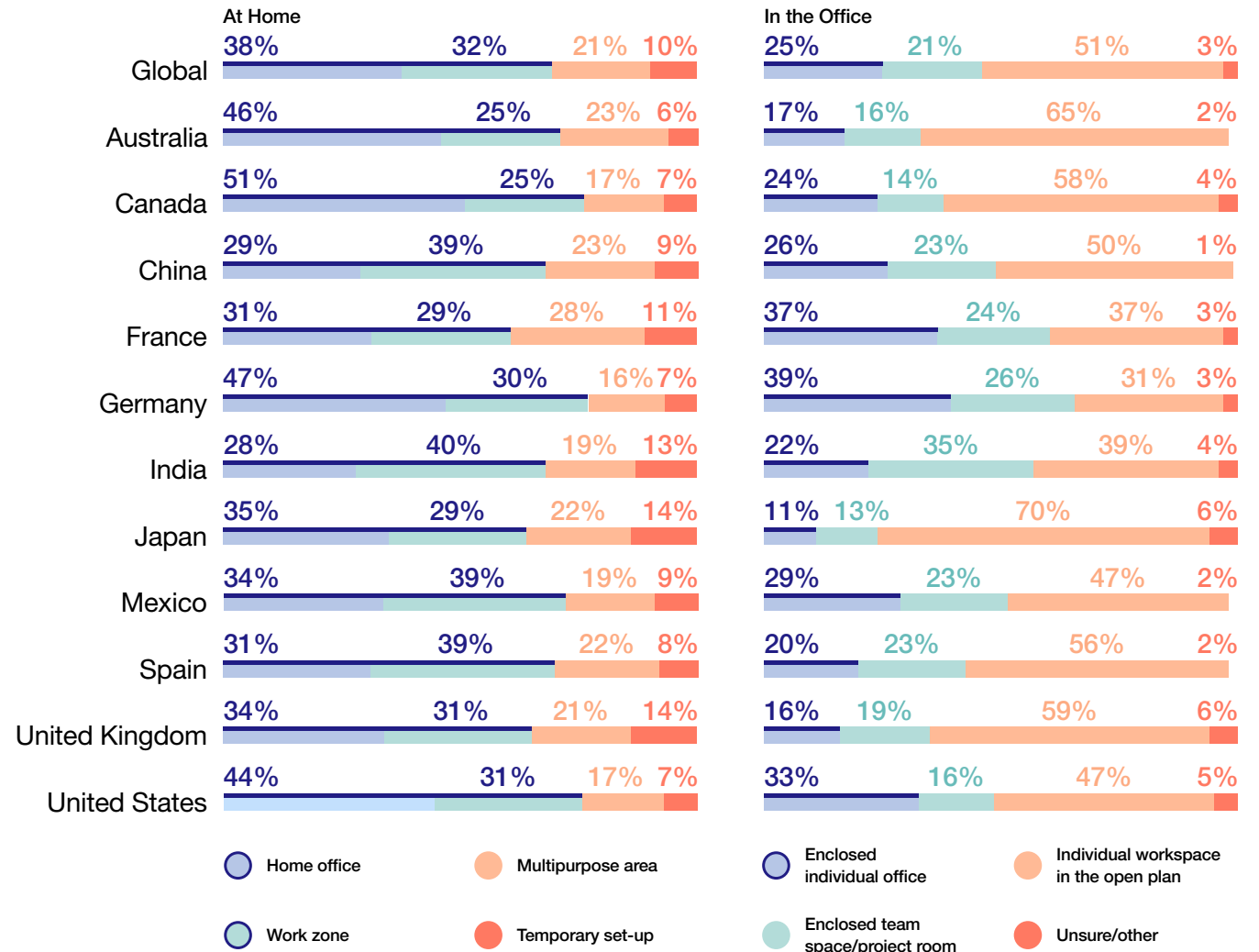
work in the open plan at the office

Key Finding #2

Where People Work

In all 11 countries studied, more people have a dedicated workspace at home (either a home office or a work zone) than they do in the office. Workers in Australia, Japan and the UK are most likely to work in the open plan in the office.

More people have dedicated workspaces at home than in the office



Home office: private room dedicated to work

Work zone: portion of space within an existing room with office furniture

Multipurpose area: residential furniture supports both work and personal activities (ie. dining table)

Temporary set-up: area supports work and personal activities (ie. kitchen counter) that reverts to its primary function when not used for work

- Home office
- Multipurpose area
- Enclosed individual office
- Individual workspace in the open plan
- Work zone
- Temporary set-up
- Enclosed team space/project room
- Unsure/other

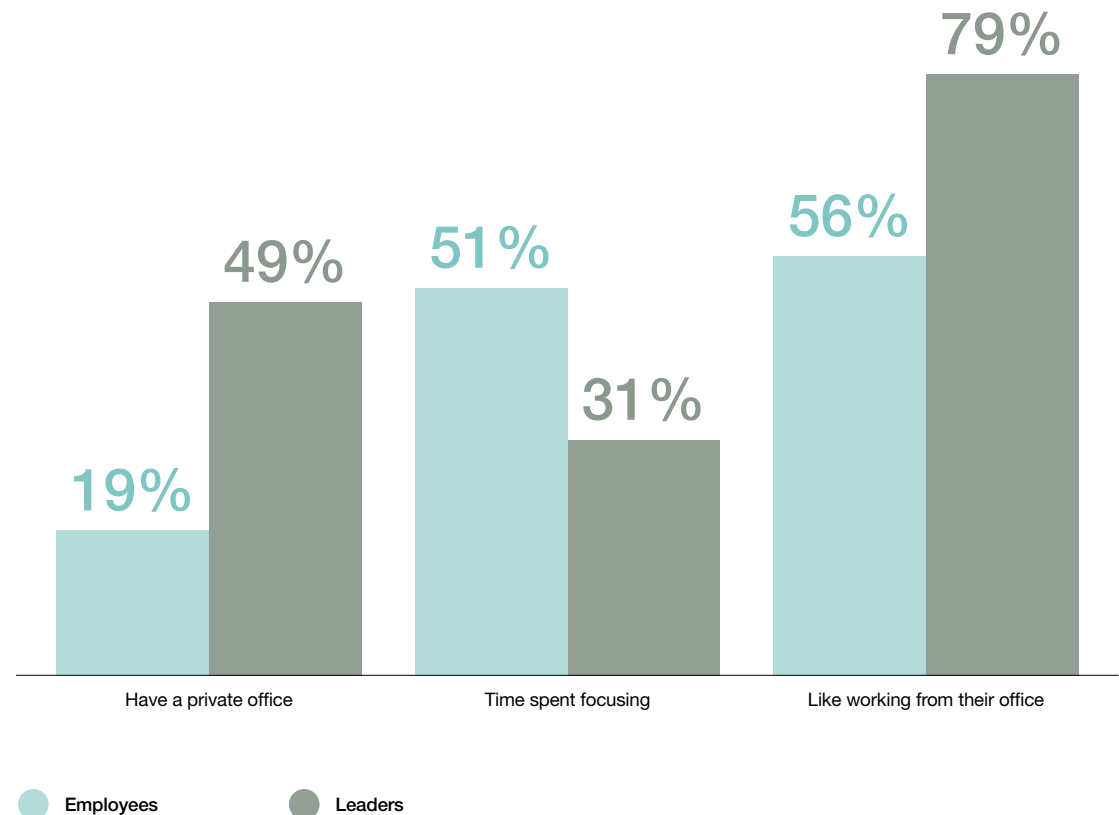
Key Finding #2

Leaders Have a Better Work Experience Than Employees

While the majority of people have a dedicated workspace at home, those who don't are more likely to be employees, who are also less likely to work in private offices than senior leaders. Yet, employees spend more than half their time doing focused work compared to less than a third of leaders' time. Given this traditional hierarchy in many offices, it's also not surprising people say they prefer to work from home where — even if they have to work on the sofa — they are more likely to have a greater sense of control over their work experience and more privacy. Globally, leaders like working in their offices more than employees — not surprising given their access to privacy.

Noteworthy: The gap between leaders and employees widens in countries like Australia, Canada, the UK and the US.

Leaders are more likely to have a private office and like working from their office



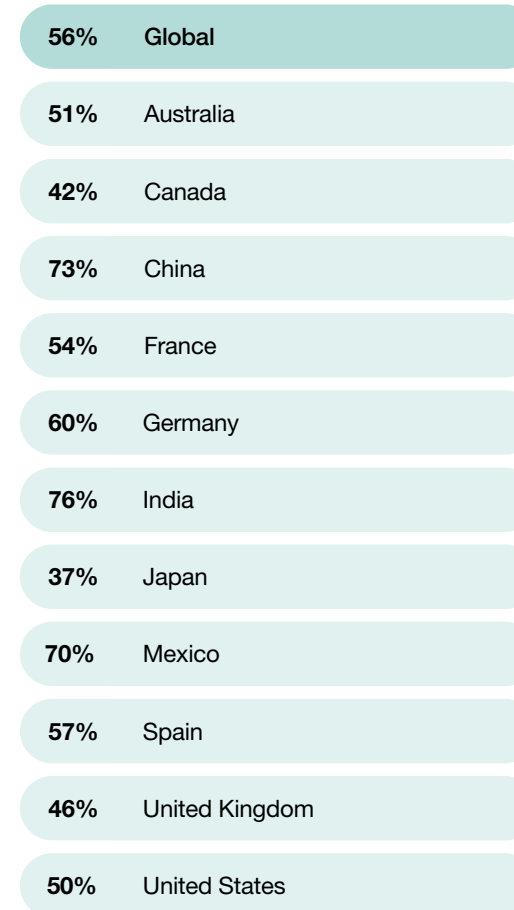
Key Finding #2

Leaders Prefer the Workplace More

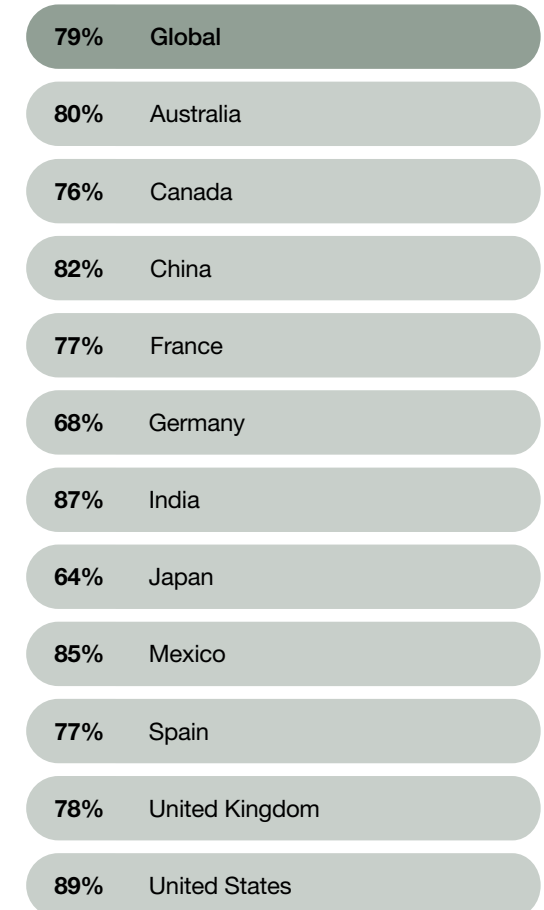
In all 11 countries, leaders prefer working in the office more than employees. The gap is especially large in the United States as well as Canada, the UK and Australia.

Who likes working from their office more?

Employees



Leaders



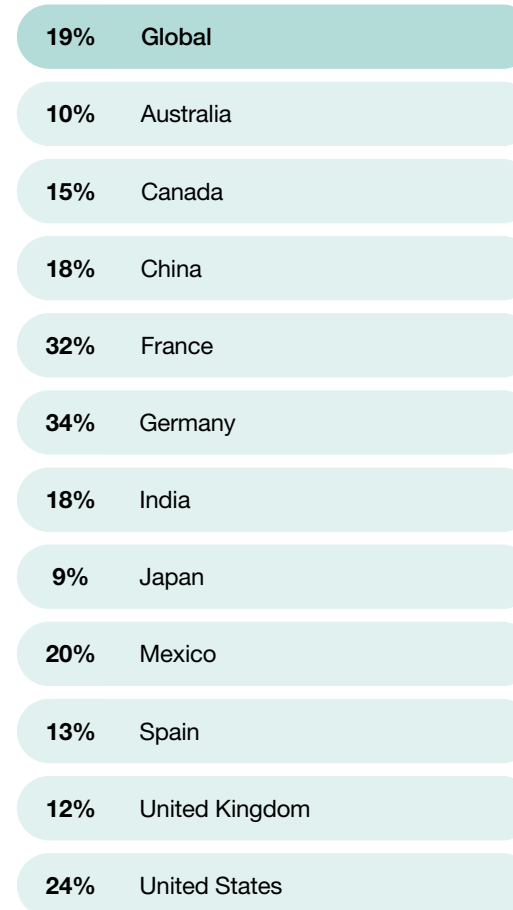
Key Finding #2

Leaders and Privacy

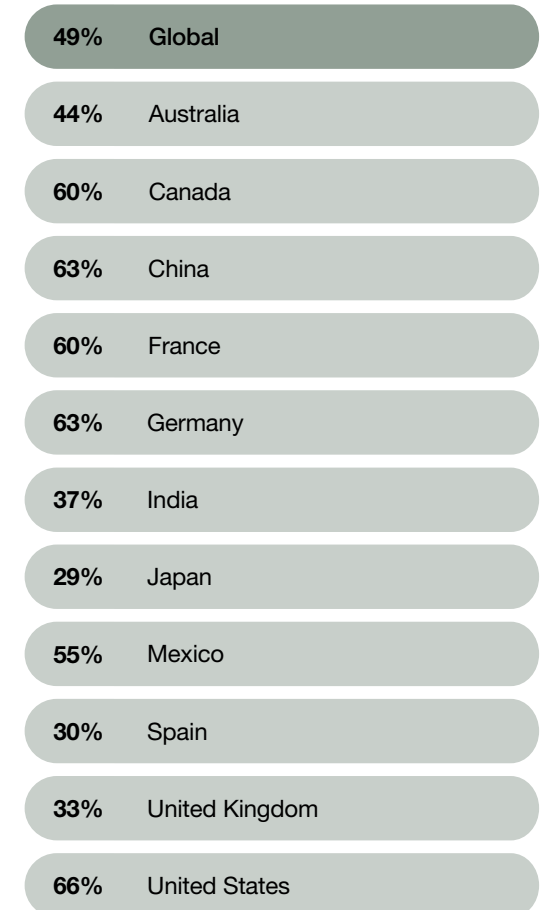
It's not surprising that in all 11 countries studied leaders are more likely to have a private office than employees. The gap is the largest in the US, Canada and China.

Who is more likely to have a private office?

Employees



Leaders



Key Finding #2

Leaders and Focus Work

Despite having more access to privacy, leaders spend less time doing focused work than employees. This holds true in all 11 of the countries studied.

Employees spend more time doing focus work

Employees

51% Global

52% Australia

58% Canada

38% China

59% France

53% Germany

31% India

52% Japan

43% Mexico

60% Spain

56% United Kingdom

57% United States

Leaders

31% Global

27% Australia

31% Canada

26% China

40% France

36% Germany

22% India

32% Japan

28% Mexico

41% Spain

31% United Kingdom

26% United States

Key Finding #2

Assigned Desks Are Decreasing

Organizations are making real estate decisions based on what they expect to be reduced levels of occupancy as hybrid work is adopted. One of those decisions is to shift to more unassigned desks to accommodate flexibility. Globally, 15% of employees working for large organizations (10,000+ employees) have lost their assigned desk; overall, regardless of the size of the organization, 10% of employees have lost their assigned desk, compared to pre-pandemic.

While the data suggests organizations should stick with assigned desks, it is possible to create workplaces that give

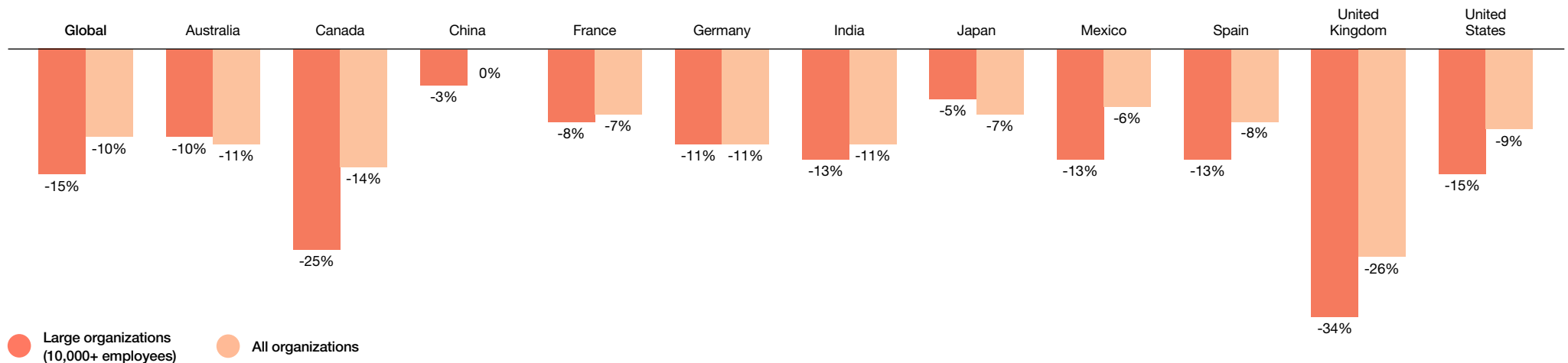
people choice and control and help them feel a sense of belonging by thinking about ownership in new ways — consider team ownership, project ownership or temporary ownership.

While the strategy to shift to more unassigned spaces may help with real estate costs, it could increase other costs that are harder to measure or see immediately. Without a dedicated workspace or a clear understanding of where people can find a place to do their individual work, leave their belongings or find a team member, people may feel uprooted. This growing group of nomads is struggling to feel connected to their company or a

sense of belonging, adding to the loneliness and isolation they experienced working from home during the pandemic.

Just as policies are changing to accommodate the desire for hybrid work, so should spaces. The workplace will need to draw people in and provide them with even better spaces and amenities than people are currently experiencing at home if leaders expect them to return to the office.

Fewer assigned workspaces than pre-pandemic



Key Finding #3

Access to private spaces is more important than ever, especially as more work happens on video. People want their office to help them collaborate and focus as they adopt new hybrid work habits.

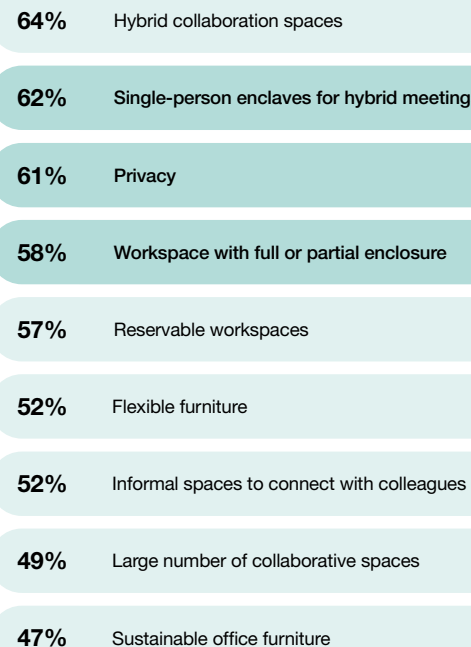
There are dramatic shifts in how and where people work, which are likely to continue to evolve as organizations adjust to whatever form of hybrid work is best for them. In this highly fluid environment, organizations are trying to determine the best strategies for their current offices and there is a wave of conversations suggesting the office should be designed for collaboration and socialization — some even suggesting the office become more like a clubhouse.

Leveraging the workplace to help build relationships is, without a doubt, critical for creating a strong culture and helping people feel a much needed sense of belonging. But the office needs to do much more. People are spending more time than ever on video calls, which has radically changed the way work happens. It's clear the technology platform is only part of the solution — people also need spaces designed to support this new way of working.

Noteworthy: When asked what office features are more important to people now than before the pandemic, the top two are about spaces for hybrid meetings. The top three-out-of-four all relate to more access to private spaces for video calls and focus work.

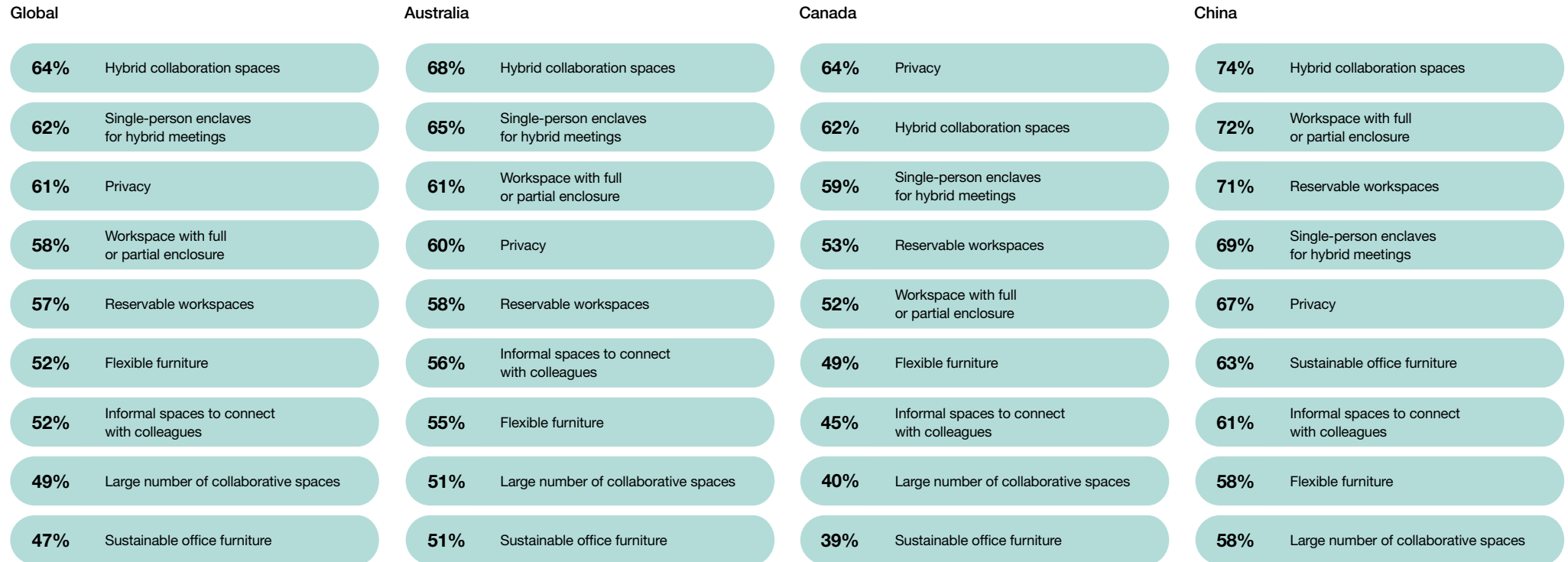
What people value more in the office now

Global



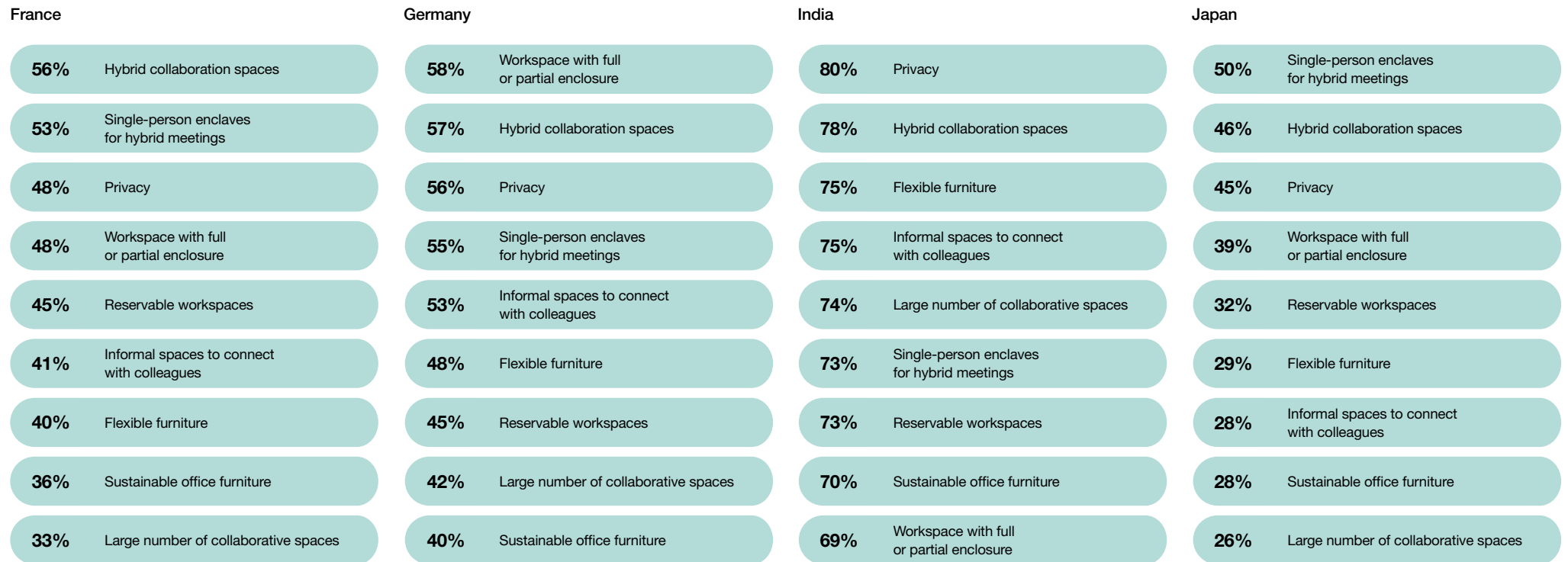
Key Finding #3

What People Value More in the Office Now



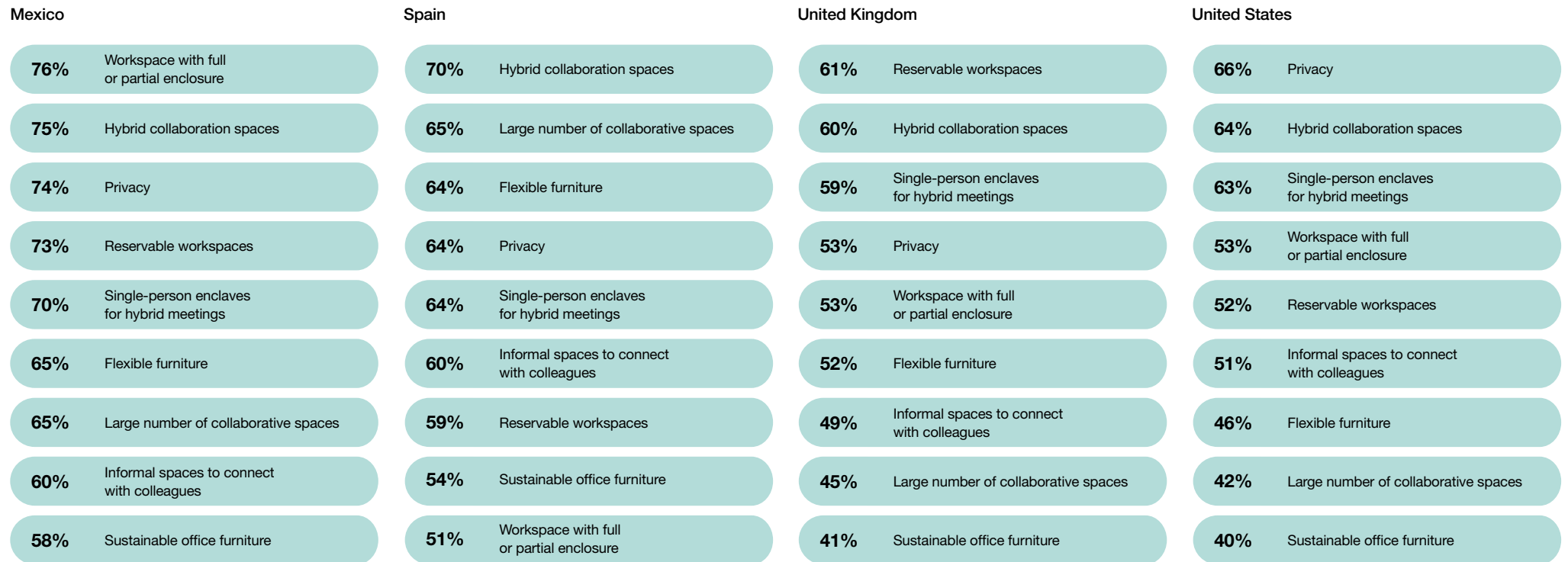
Key Finding #3

What People Value More in the Office Now (continued)



Key Finding #3

What People Value More in the Office Now (continued)



Key Finding #3

People Need the Office to Support All Work Modes

Certainly, collaboration and staying connected to other people have been difficult during the pandemic. The opportunities to work side-by-side, where everyone can participate equally, have been constrained. It’s no surprise when people need to work with others, they prefer to be in the office, and co-working facilities are viable options for some.

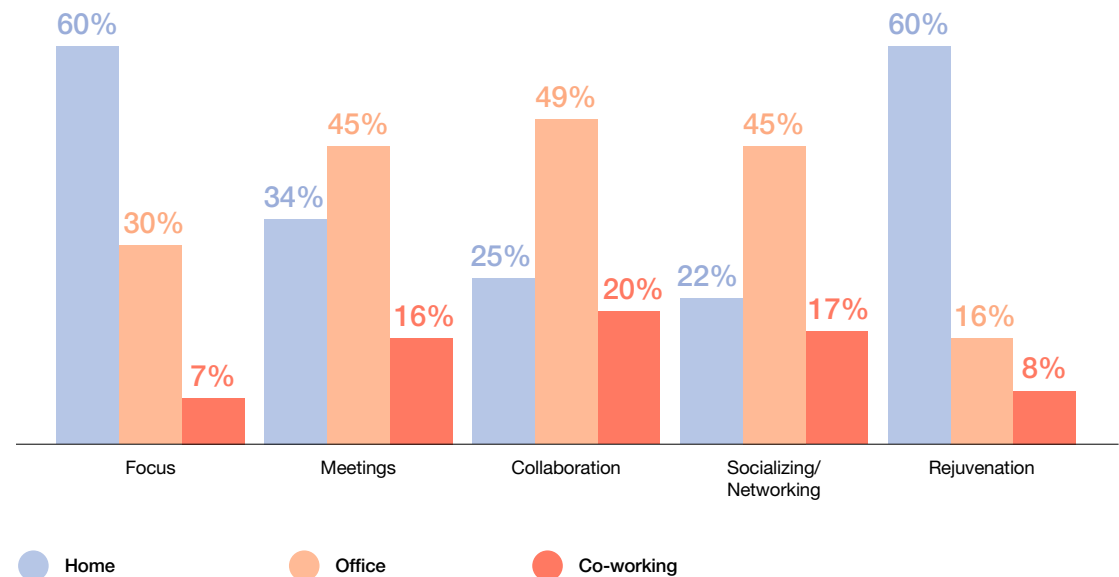
Which is why, as organizations rethink the role of the workplace in an era of hybrid work, some say the office will become a destination for collaboration and bringing people together, assuming people will do individual focus work at home.

The problem is that’s not how work happens. Weeks aren’t neatly divided into collaboration days and focus days — people do both group and individual work throughout their day. Highly effective collaboration actually requires an ebb and flow of working together and alone. And, for most people, the commute makes it impractical to shift between the office and home throughout the day, which means people will struggle to be productive if the workplace doesn’t provide the access to privacy that has become even more important to people during the pandemic.

The reason people prefer to do individual work from home may be because they need more privacy than their current open-plan office offers them — which is what most people have — especially at a time when they have focus work and an increasing amount of time spent on video interactions.

Collaboration may draw people to the office, but if people can’t do individual focus work there as well, they will struggle to feel productive after they’ve made the commute.

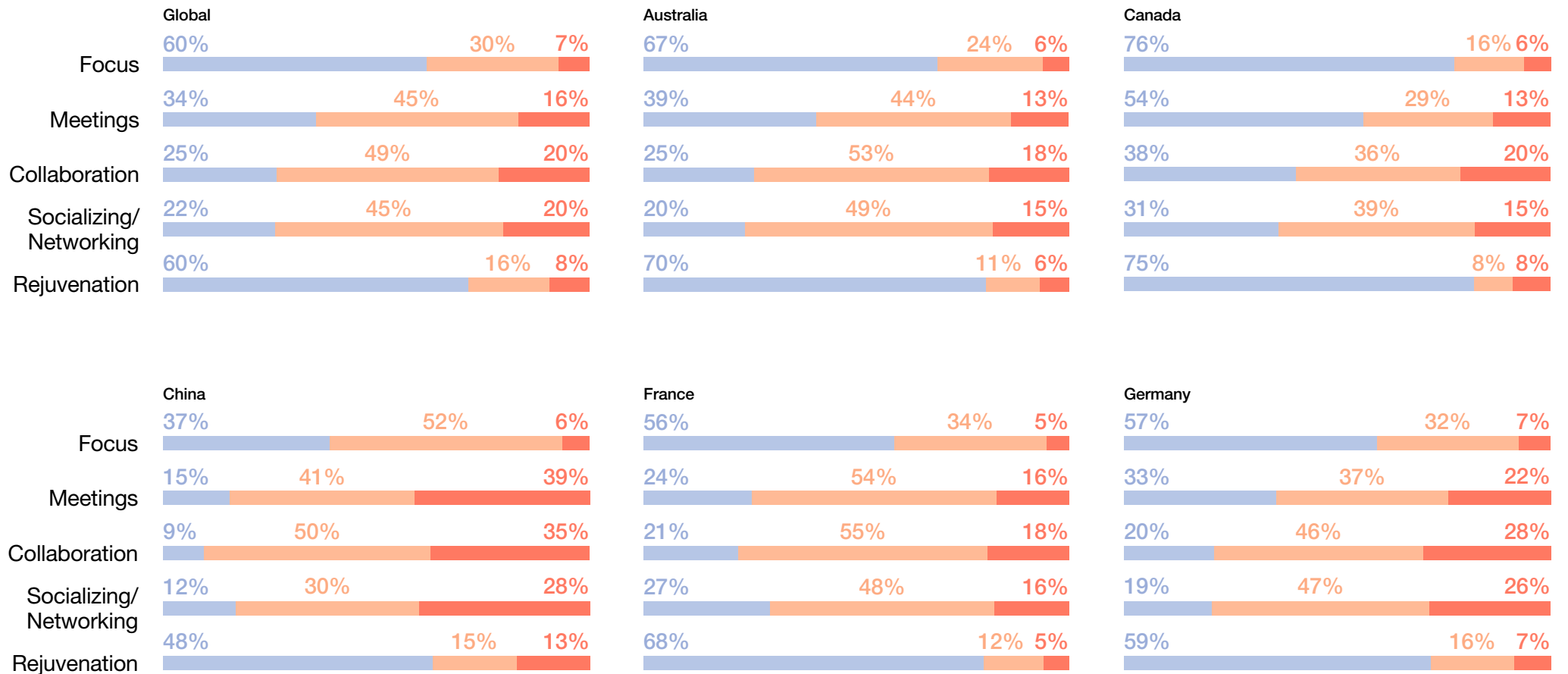
Where people prefer to do different types of work



Note: Numbers do not add up to 100%. Remaining is categorized as “other.”

Key Finding #3

Where People Prefer to Do Different Types of Work

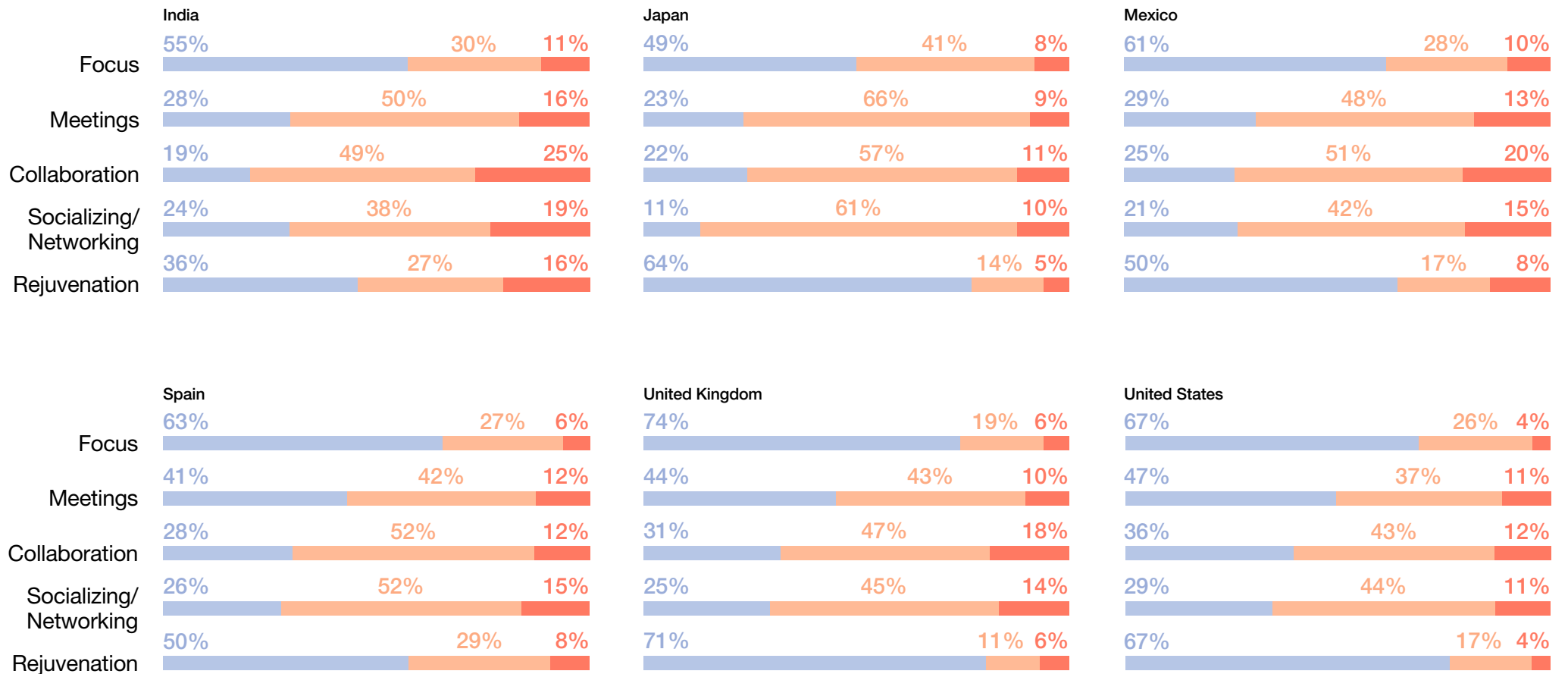


● Home ● Office ● Co-working

Note: Numbers do not add up to 100%. Remaining is categorized as "other."

Key Finding #3

Where People Prefer to Do Different Types of Work (continued)



● Home ● Office ● Co-working

Note: Numbers do not add up to 100%. Remaining is categorized as "other."

The Hybrid Neighborhood

The hybrid workplace should be more like a thriving community where people feel belonging and purpose.

Hybrid work changes everything and people have new expectations for their workplace. The office must adapt to evolving and fluid work patterns. Hybrid neighborhoods are diverse, inclusive and respond to what people and organizations need today.



How the Workplace Needs to Change to Earn People's Commute



The paradigms that guided office design in the past no longer work today. As this research shows, 87% of people are going to spend time in the office, but they're going to be working differently than they did before the pandemic. What matters most to employees has changed and the way work happens has changed. Offices will have to change to meet the pragmatic needs for this new era of hybrid work. But they also have to address the needs and expectations of people who are looking for a fundamentally different experience at work. In short, the office must earn people's commute.

The workplace should draw inspiration from a new source — the vibrant communities in which we live.

Jane Jacobs, author of "The Death and Life of Great American Cities," argued decades ago people need diverse neighborhoods to thrive, where homes, bustling sidewalks, shops, parks and public spaces come together and "exist in extraordinary variety." They exude vitality and energy — nothing is static — places and activities adapt and change. The neighborhood is where people form relationships, feel a sense of belonging and build trust.

“A better vision for a workplace is a community — a place where people bond around shared values, feel valued as human beings, and have a voice in decisions that affect them.”

Adam Grant

Organizational psychologist and author Adam Grant agrees with this today. “A better vision for a workplace is a community — a place where people bond around shared values, feel valued as human beings, and have a voice in decisions that affect them,” says Grant. The best neighborhoods are ones that foster inclusion and exude personality, where ideas are born and trends are launched. **This is what people at work need more than ever before.**

Organizations can create diverse neighborhoods in their workplace as a tangible way to communicate their values and shift their culture. The workplace can create the same energy and connection that people feel sitting in a sidewalk cafe or the same level of flow they experience in their local library.





Building a Neighborhood at Work

Neighborhoods at work, like the ones people live in, are a homebase for people and teams, departments or project teams. They include a variety of interconnected space types that support a mixture of uses, feel organic and flow naturally from one to another. They include:

- Individual spaces that are assigned to one person or shared among the team
- Collaboration spaces for in-person and virtual interactions that support the different ways people need to work together
- Places with appropriate privacy for individual heads down work or finding solitude and rejuvenation
- Areas to gather, socialize and learn with teammates

Neighborhoods become a destination, where people feel comfort and confidence they can find their teammates and the tools they need for their work.



Hybrid neighborhoods meet new ways of working and expectations when based on three key design objectives.

Equity

Create a more equitable and inclusive experience for all participants, with a design goal to eliminate the gap between co-located and remote employees.

Engagement

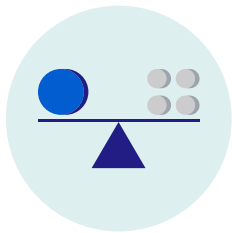
Design settings for a range of experiences that help people participate fully, focus deeply and stay in flow longer.

Ease

Design a variety of intuitive virtual and physical experiences that are easy to navigate and control.

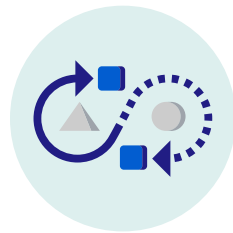
Design Principles

While every neighborhood has its own distinctive character — Soho in New York is very different from Soho in London — there are four key design principles that can guide the creation of a vibrant neighborhood.



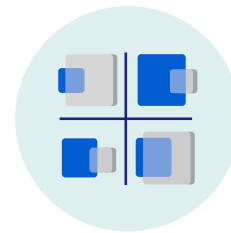
Me + We

Just as city neighborhoods have homes and shared spaces, the new neighborhood at work supports both individual and team work. The amount of space for each will vary, but the neighborhood supports people doing different types of work throughout the day. Most say they spend 55% of their day working alone and 45% with others, making it impractical to plan an office for collaboration only and expect people to simply go home to focus. Neighborhoods also help people make quick shifts between different kinds of work and learn from being around others.



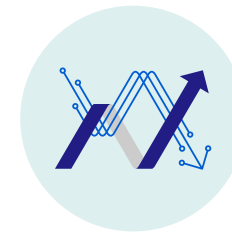
Fixed to Fluid

Great neighborhoods evolve as needed when new people move in or a new store opens. At work, change is constant, sometimes in small ways as teams need to add more people, or in significant ways when they need more collaboration spaces. Spaces in the new hybrid neighborhood are modular, movable and multi-use — they can support different types of work and be reconfigured or modified easily.



Open + Enclosed

Privacy in the office has surfaced as one of the issues that became even more important during the pandemic. People struggled with significantly open office plans and now, after working from home, have become even more sensitive to the need for control over their privacy. Great neighborhoods offer the blend of private and public spaces that makes the neighborhood diverse and dynamic — the kind of place people choose to live in.



Braiding Digital and Physical

Just as urban planners are creating smart cities, hybrid neighborhoods at work need to do the same. Video meetings are a new norm in the office and everyone needs to see and be seen, hear and be heard. With fewer assigned spaces, online booking systems can help people find a place to call their own, even if it's just for a day. The technology needs to be easy to use, but most employees say the biggest issue with their current areas for video meetings is that the space is too small or uncomfortable.



Creating Community at Work

Communities are living systems, whether they are places people live or groups connected by a shared purpose. They are able to adapt over time, which is how they survive in the face of dramatically changing circumstances. Sociologist Eric Klinenberg's research shows a community's health and resilience is influenced by what he calls "social infrastructure" — the physical places where people develop social capital — which is why organizations should look to thriving communities as a model for work and the places where people work. People are not static. Work is not static. And a workplace can't be static if companies want their many stakeholders to thrive.

When the workplace is conceived as a community, made up of diverse neighborhoods, it helps people by creating:

- A sense of belonging and higher levels of trust among teammates
- Greater choice and control of their overall work experience
- More options for equitable access to private places
- The ability to shift easily between collaboration and individual focus work
- Ways to build social connections and learn from one another

For organizations, neighborhoods help:

- Attract people to the office
- Increase engagement and productivity
- Build a connection to the culture and sense of community which helps retain employees
- Foster resilience
- Adapt easily to changing levels of office occupancy

Thinking of the workplace as a community made up of thriving neighborhoods is a big shift for many. Since its inception, the office has been built on conventional thinking and valuing efficiency over the wellbeing of people and their desire to feel a sense of purpose and progress.



The experience of working through a pandemic has caused the world to fundamentally rethink the work we do, the way we do it and the choices we need to be successful and fulfilled.

Working from home shed light on the benefits of focus as much as it did on the need for social interaction. People are social animals and work is inherently a social undertaking. Keeping people tethered to a computer screen is not the answer, nor is keeping them tethered to a workplace that doesn't help them do their best work.

It's time to put the needs of people in the forefront and design policies and places that help people and organizations thrive. Just as with any great neighborhood, it's not the buildings and architecture alone that makes it a place people want to be —it's about the energy, spirit and sense of community they experience when they're there.

It is an investment in human capital that starts with understanding what matters most.



Our Commitment

Steelcase is committed to continuing research to understand what's next and share what we're learning to inform new products, solutions and innovations that will help organizations create a better workplace. Right now, explore new essential solutions for hybrid work at steelcase.com/new.

We Can Help

Steelcase and our industry-leading dealer network provide in-depth research, expertise, quality products and reliable service that have made us a proven, trusted partner to leading organizations for over 100 years.

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