



COVID-19 drives demand for flexibility and more meaningful office connections

A new survey of 1,000+ U.S. office workers* points to how people see their relationship with the office changing after COVID-19 and what that means for the future of work



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Front Cover: **Defined as those who worked in an office and/or remotely prior to COVID-19*





Summary

With the coronavirus pandemic forcing many to work remotely, people see their relationship with the office changing after COVID-19 — and a new work world that emphasizes flexibility and more intentional time in the office.

Workspaces around the world have been left vacant as companies introduce remote-work policies and shift-work schedules in response to the coronavirus pandemic. This unprecedented event is profoundly impacting how employees carry out their workdays. It's also reshaping expectations about what a return to the office will look like.

In a survey, conducted online by The Harris Poll and sponsored by Hana among 1,000+ U.S. office workers, we discovered a workforce fully embracing the flexibility remote work offers and considering the value of going back to the office after COVID-19.

That's not to say people don't plan to head back to the office. They do. Employees view the office as a critical place to meaningfully connect with colleagues, highlighting how in-person meetings and chance encounters with coworkers are difficult to replicate online.

But notably, few people place value on "fun" workplace perks such as social events and in-office amenities, suggesting these would be low motivators for heading back to the office. This has implications for companies that have invested significant capital in workplace perks over the past decade in an attempt to gain a competitive edge in a tight labor market.

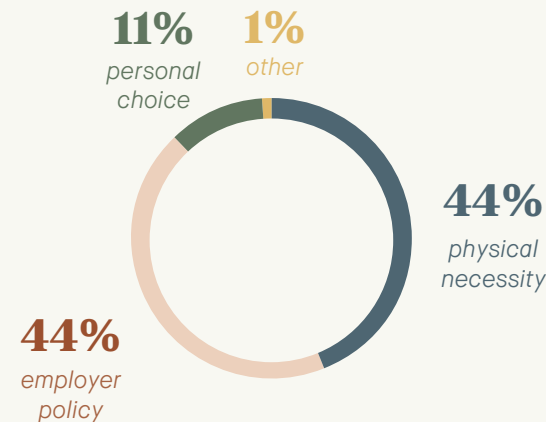
We'll explore how people see their relationship with the office changing after COVID-19 — and what that means for the future of how we work.

Employer policies dictate where employees work — and COVID-19 has forced abrupt changes

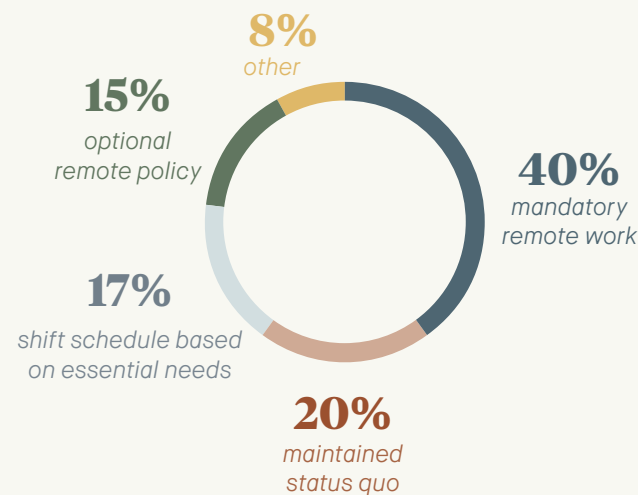
For many employers, the coronavirus pandemic has forced an abrupt adoption of remote work policies. Prior to the pandemic, just 11% of full-time office workers say their employers gave them the choice to work remotely.

Now, 55% say their employer has either mandated they work remotely/at home or given them the option to do so. An additional 16% say their employer has introduced a shift schedule in light of COVID-19.

WHY EMPLOYEES WORKED IN AN OFFICE FULL-TIME PRIOR TO COVID-19



WHERE FULL-TIME OFFICE WORKERS ARE WORKING DURING COVID-19, BASED ON EMPLOYER POLICY

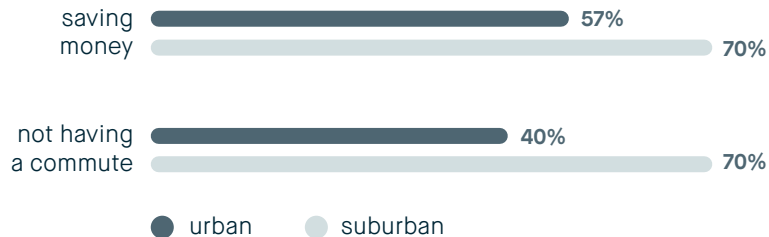




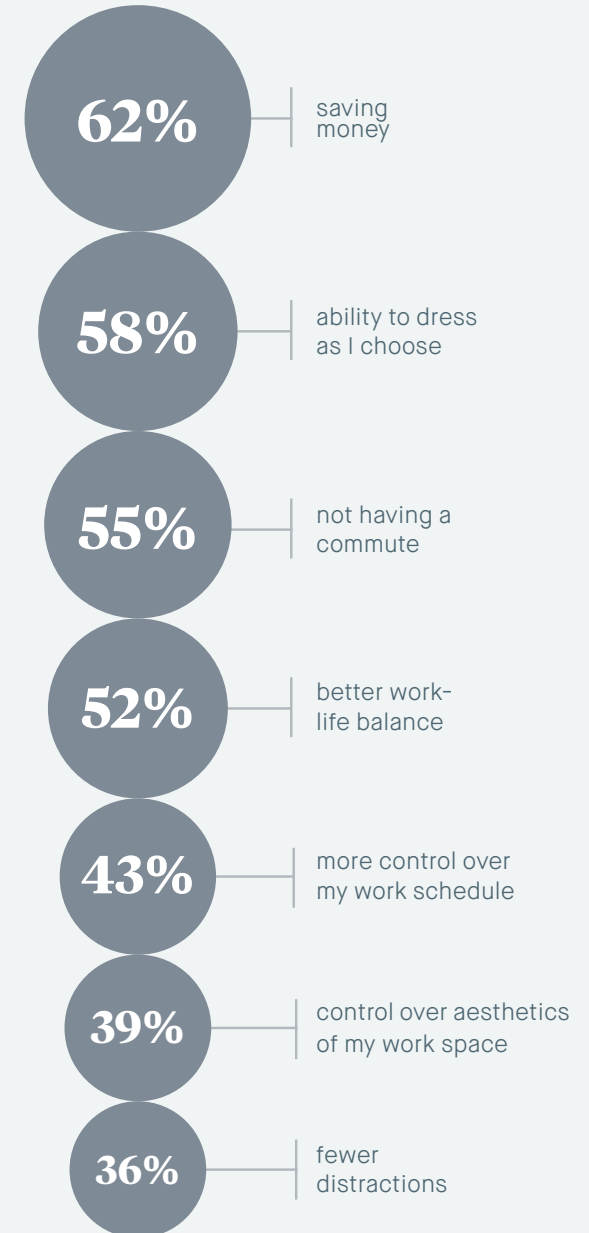
Office workers who now work remotely see the benefits

With an unprecedented number of people now working remotely due to COVID-19, nearly all are discovering a number of advantages to remote work. **In fact, 99% say there are aspects of working remote they find valuable.** Among the top benefits? Saving money, foregoing work commutes and gaining more control over their work schedule.

THOSE WHO LIVE IN A SUBURBAN ENVIRONMENT ARE MORE LIKELY TO VALUE SAVING MONEY & TIME COMMUTING WHEN WORKING REMOTE



TOP BENEFITS OF REMOTE WORK THAT EMPLOYEES VALUE



Working remote full-time has its own set of challenges

Working remote full-time isn't all benefits, though. While 99% of found benefits to working remotely, **86% say there are aspects of working remote they find challenging**. From struggling with distractions to effectively connecting with coworkers, people are navigating a radically different workday.

Many of these challenges are unique to the time we find ourselves in. With everyone from roommates to family members now stuck at home, our personal lives and work lives have become helplessly intertwined.

But notably, more than a quarter of employees working remotely due to COVID-19 (27%) say one of the things they find difficult is effectively collaborating with colleagues virtually. Even with video conferencing and chat app tools such as Zoom and Slack, people seem to be finding virtual meetings and instant messages poor substitutes for in-person time with colleagues.

CHALLENGES OFFICE WORKERS ARE FACING WHILE WORKING FROM HOME/A REMOTE LOCATION DUE TO COVID-19

Separating working hours from personal life

Ability to focus on work with distractions

Dealing with uncontrollable noises

Effectively collaborating virtually

Lack of quiet, private spaces

35%

33%

31%

25%

Working with colleagues/clients online is a pain point for many employees working from home/a remote location due to COVID-19

27%

of employees said they had challenges collaborating virtually

What people miss from the office:

Meaningful connections with colleagues

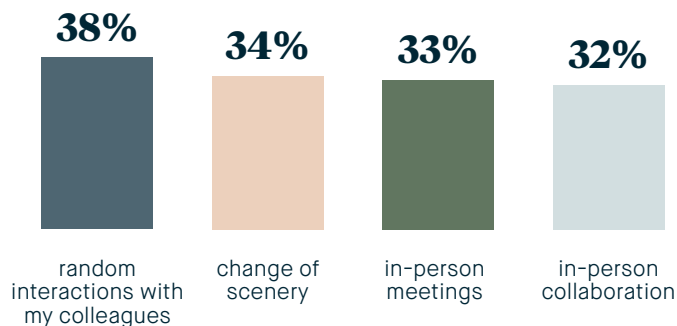


The difficulty people have connecting with coworkers while working remote gets at what people miss from the office: the opportunity for meaningful connection.

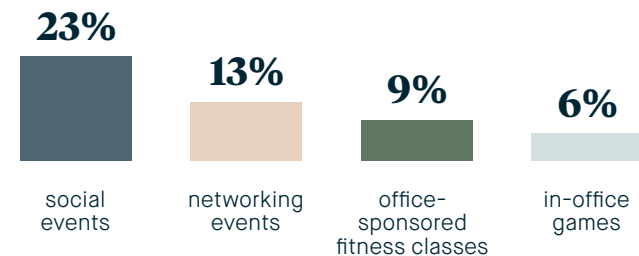
In our survey, **the top aspect those currently working remotely due to COVID-19 say they value about working in an office is interactions with colleagues.** In contrast, very few say they value “fun” workplace perks such as networking events, fitness classes and in-office games.

This runs counter to corporate investments in office space over the past decade, which have largely focused on introducing fun amenities to gain a competitive advantage in a tight labor market.

WHAT EMPLOYEES VALUE MORE ABOUT WORKING IN AN OFFICE AFTER WORKING FROM HOME/REMOTELY DUE TO COVID-19



WHAT PEOPLE VALUE LESS ABOUT WORKING IN AN OFFICE AFTER WORKING FROM HOME/REMOTELY DUE TO COVID-19



A common concern about heading back to the office?

The loss of flexibility

Employees want and expect to go back to the office after COVID-19. But a top concern about returning to the workplace centers around losing their newfound sense of flexibility.

In our survey, 35% of employees working remotely due to COVID-19 say the loss of a flexible work environment is a primary concern. This is second only to concerns about office cleanliness (39%). Among U.S. employees who exclusively worked in an office before the COVID-19 pandemic, 38% say they are concerned about losing the flexibility to work remotely.

Moreover, we discovered an almost 2X increase in the number of office workers who expect to continue splitting their time between the office and working remotely as those who previously worked that way prior to COVID-19. **Strikingly, 56% of survey respondents say they want to continue working flexibly between the office and a remote location or exclusively work outside the office moving forward.**

38%

of U.S. employees who worked in an office before COVID-19 are concerned about losing the flexibility to work remotely

MORE PEOPLE WANT FLEXIBLE WORK BENEFITS AFTER COVID-19

BEFORE COVID-19

37%

of people worked flexibly between the office & a remote location or exclusively worked remotely

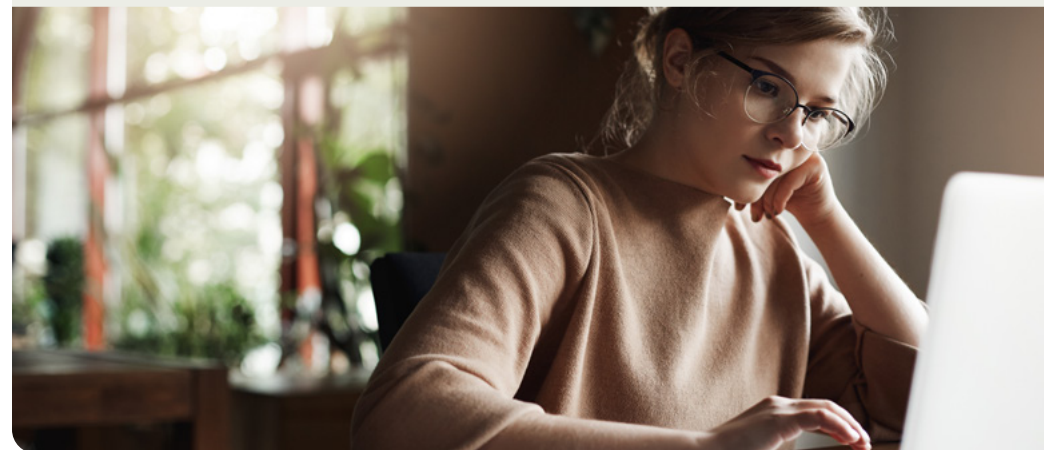
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an almost 20% increase in the demand for flexibility

AFTER COVID-19

56%

of people who want to work flexibly between the office and a remote location or exclusively work remotely



The future of work as a result of COVID-19

Amid the coronavirus pandemic, people are rapidly rethinking their relationship with the office and what their workdays will look like after COVID-19.

Moving forward, our survey sheds light on three big changes to expect:



1. WORKSPACES THAT PRIORITIZE PRODUCTIVE SPACES OVER SOCIAL SPACES WILL WIN.

From chance encounters with colleagues to in-person meetings and collaborative work, **office workers overwhelmingly value meaningful interactions in the workplace.** This has implications for companies, which over the past decade have invested significant capital in building “social” spaces and programming to stand out in a competitive labor market.

2. EMPLOYEES WILL DEMAND MORE FLEXIBILITY TO WORK OUTSIDE THE OFFICE.

While a majority of employees want to go back to the office in some capacity after COVID-19, they are discovering significant benefits to remote work — and they’re unlikely to want to give these up. In fact, **almost a third of office workers want to keep the flexibility to work outside the office** — and 38% say they’re concerned about losing the ability to work remotely.

3. OVERALL, COMPANIES WILL NEED TO RECONSIDER HOW THEY INVEST IN OFFICE SPACE.

With a rising demand for flexible work benefits, organizations need to consider the potential for reduced office occupancy, which has ramifications for **how much office space they need — and what types workspaces they offer employees.** Companies that invest in flexible and productive workspaces will be best positioned for success.



About Hana

CBRE Hana, LLC is a wholly owned subsidiary of CBRE Group, Inc., the world's largest commercial real estate services and investment firm (based on 2019 revenue). Hana partners with real estate owners to develop and operate integrated, scalable, flexible workspaces. Each unit contains office suites (Hana Team), conference rooms and event space (Hana Meet) and shared workspaces (Hana Share). Hana provides property owners increased transparency, control over their asset environment and a valuable offering for companies that desire to maintain their culture and brand while leveraging the benefits of a flexible space offering. More information is available at www.yourhana.com.

Hana helps institutional property owners meet the rapidly growing demand for flexible office space solutions. Hana offers a range of partnership solutions for real estate investors that may include Hana designing, building and operating the facilities and services.



Methodology

This reports draws on a survey was conducted online by The Harris Poll on behalf of Hana from April 13-15, 2020 among 2,108 U.S. adults ages 18 and older (among whom 1,239 are employed, and 1,055 worked in office/from home/remote location prior to coronavirus). This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated. For complete survey methodology, including weighting variables and subgroup sample sizes, please contact Lillian Beck at Lillian.Beck@yourhana.com.



Learn more at www.yourhana.com

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