

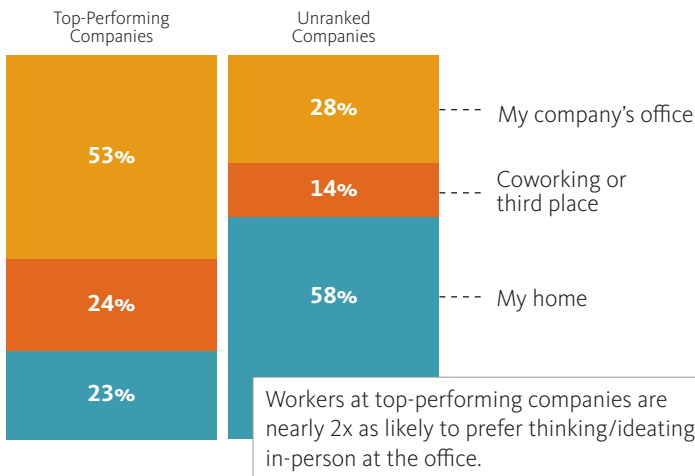
Employees at top-performing companies prefer the office for deep concentration, ideation, and creative tasks.

Workers at top-performing companies prefer their company's office for a much wider range of activities than workers at unranked companies. Top performers value the office for in-person complex creative activities like thinking, ideating, and conceptualizing. They also prefer the office for individual tasks like deep concentration. This is consistent with past research: great workplaces must support both collaboration and focus work.

Employees at top-performing companies also prioritize in-person work over virtual work, in particular for giving and receiving feedback. However, they are more likely to prefer reflection or conceptual tasks in a wider variety of places—both in and out of the office. For top-performing companies, third places are becoming a crucial component of the workplace ecosystem.

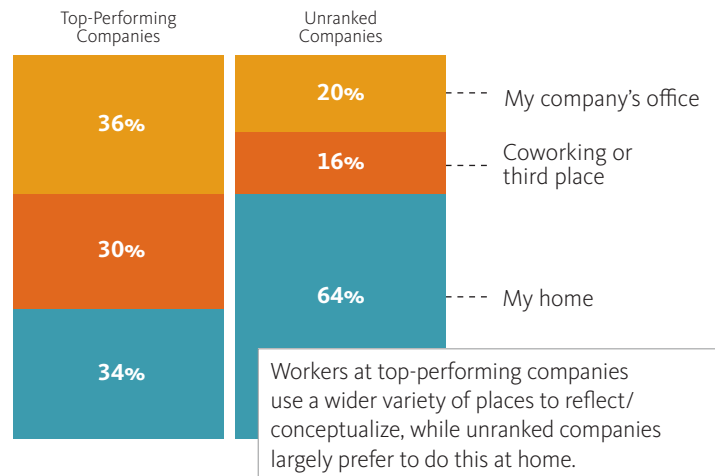
Top-performing companies' employees are nearly 2x as likely to prefer the office for individual thinking/ideation.

Percent of workers who prefer to think/ideate in each location.



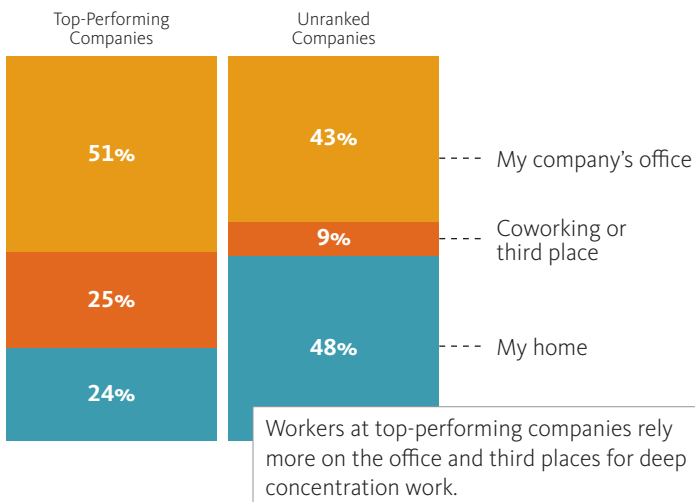
When reflecting/conceptualizing by themselves, top performers see a wider range of places as ideal.

Percent of workers who prefer to reflect/conceptualize in each location.



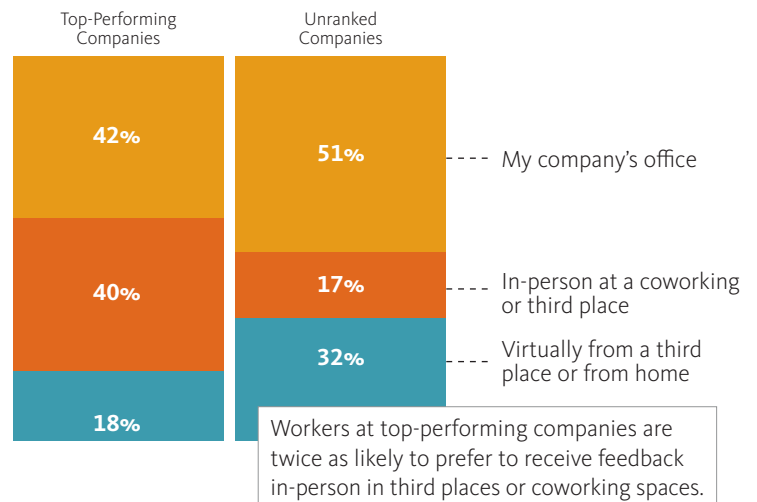
Top-performing companies rely more on the office and third places for deep concentration work.

Percent who prefer to do work requiring deep concentration in each location.



Top-performing companies prefer to give/receive feedback in-person and use both the office and third places to do this.

Percent who prefer to give/receive feedback on project work in each location.



Top-performing companies are 3x more likely to increase their real estate footprint.

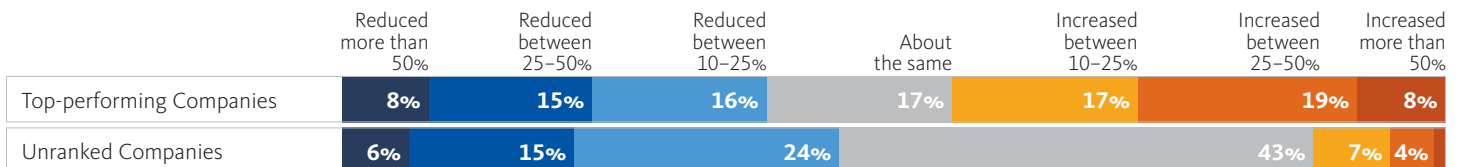
In the future, leaders expect the majority of staff will still be in the office—with a focus on collaboration, ideation, and problem-solving.

Top-performing companies understand that a hybrid work future means working differently—and the workplace will have to evolve as a result. Despite employees' continued preference for flexibility and the ability to work remotely, the workplace remains the preferred location for the majority of work activities. **Leaders—particularly leaders at top-performing companies—place a clear value on in-person interaction and the physical workplace as a means to drive performance and innovation, and are more likely to plan for near-term real estate footprint increases.**

In this study, we define top-performing companies as organizations that have recently been ranked on a Most Admired, Best Places to Work, AND Most Innovative Companies list, representing one-fourth of respondents. Leaders and employees at these companies show a similar preference for flexibility and a mix of in-office and remote work post-COVID. But the specific work activities they prefer doing at the office illustrate how these organizations understand that the physical workplace can be a crucial tool to drive creativity and innovation, and provide a great workplace experience where their organization's culture and their employees thrive.

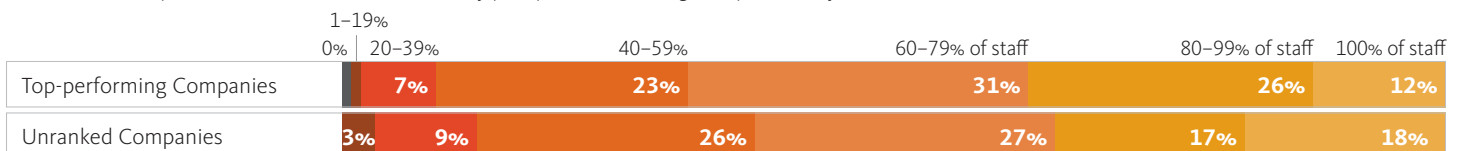
Leaders at top-performing companies are more likely to be planning to increase their real estate footprint post-pandemic.

Expected real estate changes post-pandemic (manager responses only).



Leaders at top-performing companies expect more of their staff to be in the office concurrently in the future.

Percent of staff expected to be in the office concurrently post-pandemic (manager responses only).



METHODS This survey of 2,000+ U.S. workers was conducted online via an anonymous, panel-based survey from April 20 to May 17, 2021. Respondents were required to be working full time for a company, organization, or firm of 100 or more people, and to have worked in an office environment prior to the COVID-19 pandemic. At the time of data collection, respondents worked in a variety of scenarios: full time from home, part time in the office (hybrid work model), and full time in the office. Respondents were distributed across 10 industries and represent a wide range of seniority levels, roles, ages, and geographies across the U.S.

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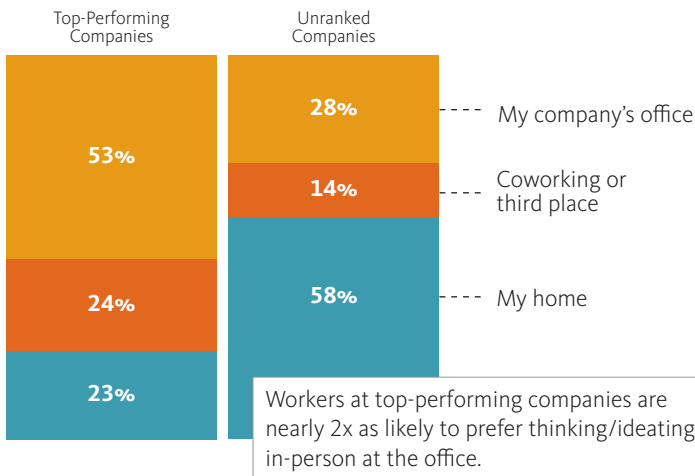
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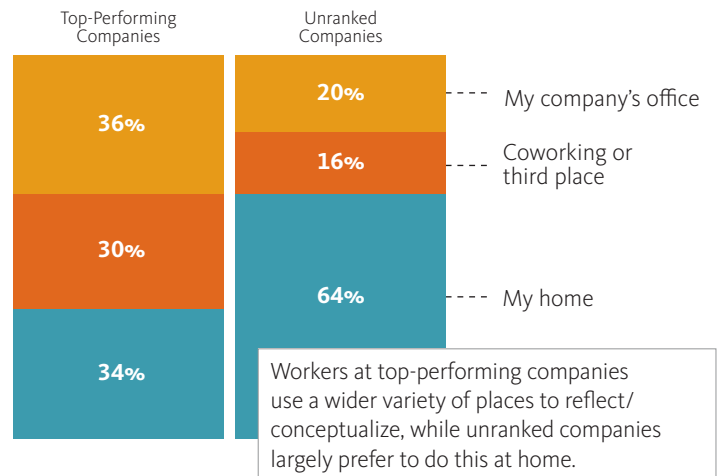
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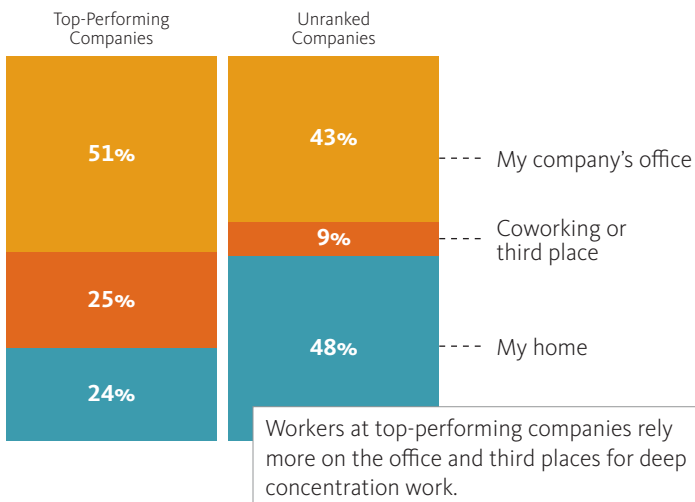
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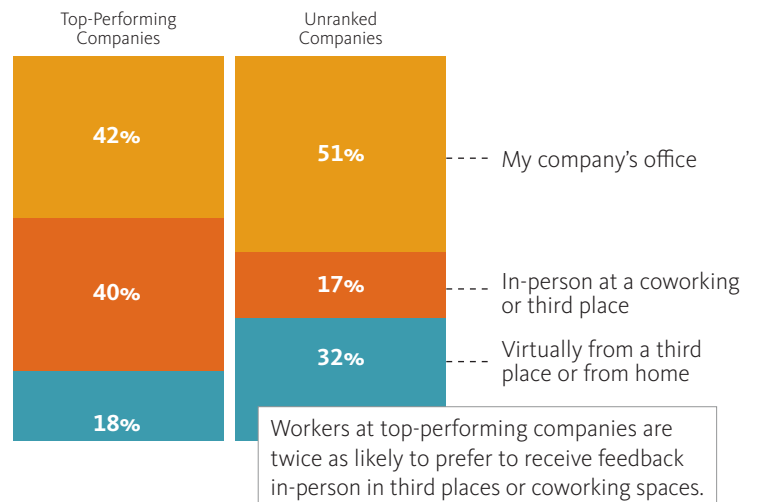
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Top Performers Prefer the Workplace

For every work task other than reading, employees at top-performing companies prefer working from their company's office over other locations.

Brainstorming and ideation—both collaborative and individual—are the activities employees at top-performing companies report the greatest preference for working from office environments, followed by a mix of individual and collaborative tasks.

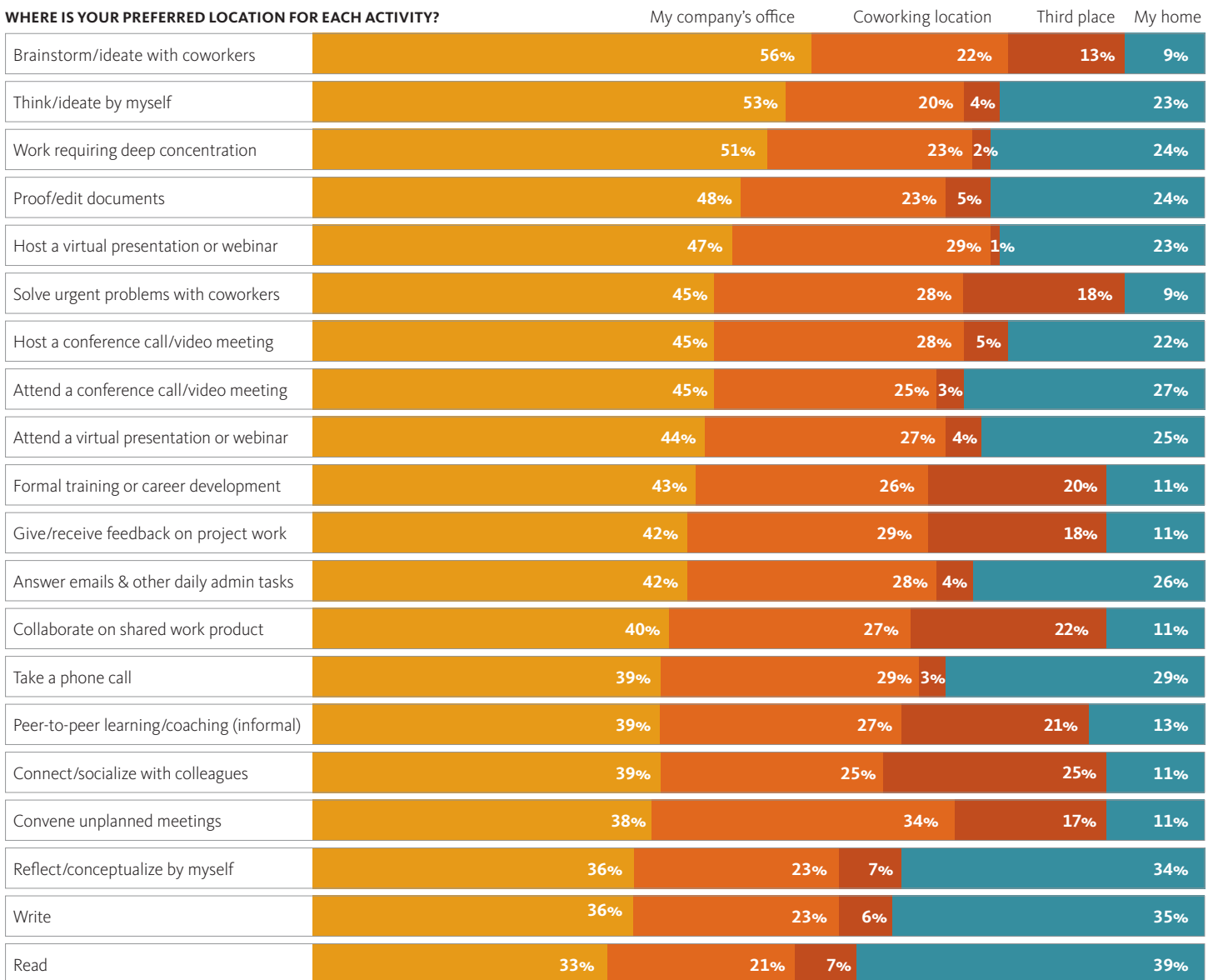
Compared to average U.S. worker respondents, top performers are more likely to rank individual tasks such as thinking/ideating and deep concentration as reliant on the office.

Overall, top performers are also generally less interested in working from home, and express a greater interest in working from third places and coworking locations for many tasks as part of their normal workweeks.

As cities reopen, this preference for work settings, both in and out of the office, may provide new urban planning and design opportunities post-pandemic.

Employees at top-performing companies consider their company's workplace to be the best place for a wide range of work activities, from ideation and hosting meetings to concentration and problem-solving.

Percent who prefer each location for each work activity.



Younger workers—particularly Gen Z—have a different conception of the workplace.

Workers across all ages prefer a mix of in-person and remote work. However, younger workers have a more holistic vision for functions of the workplace.

While all employees agree that collaboration is a crucial part of the office's value proposition, beyond that, generational differences begin to emerge. When asked about the primary purpose of the workplace, Gen Z respondents are significantly more likely to rank maximizing individual productivity, and the only generation to rank being visible for promotion in their top ten. Gen Z and Millennial respondents are also the only groups to rank inspiring creativity and innovation as a primary purpose of the office. Conversely, older workers are most likely to note access to specific spaces, materials, or resources.

IN YOUR OPINION, THE PRIMARY PURPOSE OF THE OFFICE IS TO...

Rank	Gen Z	Millennial	Gen X	Boomer
1	Collaborate with my team	Collaborate with my team	Collaborate with my team	Collaborate with my team
2	Meet with clients	Foster professional & personal relationships	Foster professional & personal relationships	Share knowledge and best practices
3	Maximize individual productivity	Share knowledge and best practices	Meet with clients	Access specific spaces, materials, or resources
4	Be visible for promotion	Maximize individual productivity	Build social connections and fostering camaraderie	Foster professional & personal relationships
5	Inspire creativity and innovation	Meet with clients	Access specific spaces, materials, or resources	Maximize individual productivity
6	Build social connections and fostering camaraderie	Access the latest technology and tools	Share knowledge and best practices	Meet with clients
7	Communicate shared mission, values, and culture	Build social connections and fostering camaraderie	Maximize individual productivity	Build social connections and fostering camaraderie
8	Access to senior leaders/ decision makers	Access specific spaces, materials, or resources	Communicate shared mission, values, and culture	Access the latest technology and tools
9	Access specific spaces, materials, or resources	Inspire creativity and innovation	Access the latest technology and tools	Communicate shared mission, values, and culture
10	Foster professional & personal relationships	Communicate shared mission, values, and culture	Access to senior leaders/ decision makers	Access to senior leaders/ decision makers

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Younger Workers Value the Office Differently

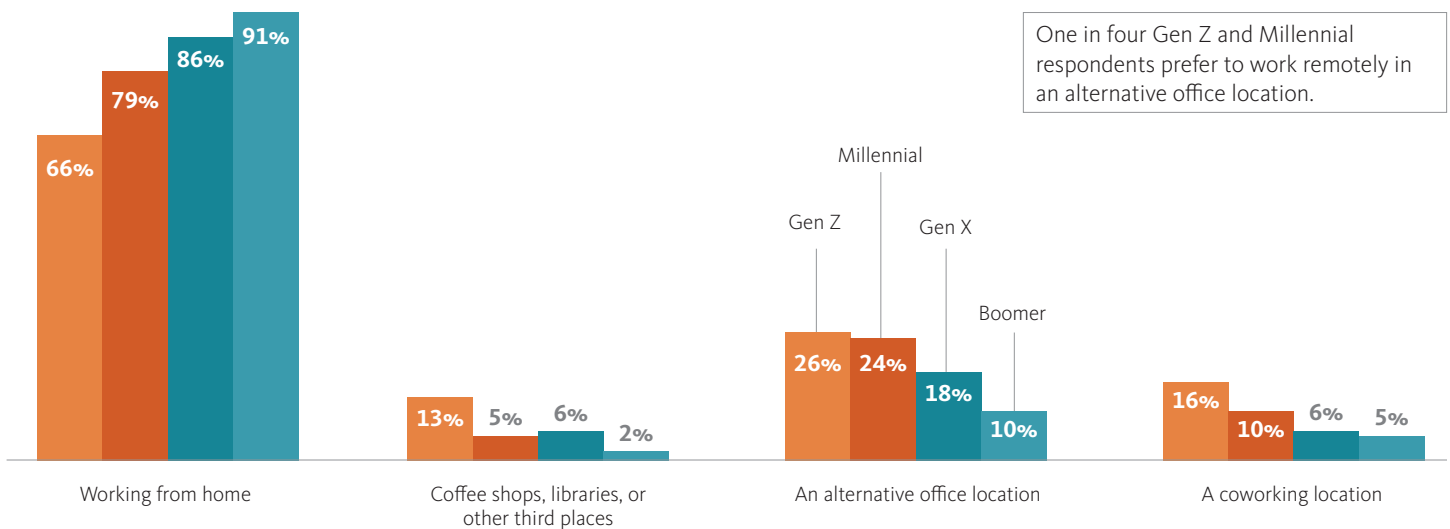
Millennial and Gen Z workers see remote work as anywhere work, not just working from home.

Workers—particularly younger workers—clearly understand remote work to be more than just working from home. While 90% of Baby Boomer employees say home is where they prefer remote work to happen, only 2/3 of Gen Z respondents agree. Younger workers see remote work happening in a wider range of places, including third places, other office locations, and coworking spaces.

Younger workers' focus on flexibility translates into their preferences for in-office work. Whereas Boomer respondents are most likely to prefer assigned desks, even with the caveat this requires being in the office more, younger workers instead prioritize the autonomy to work remotely and are willing to share desks to support that flexibility. Importantly, the majority of respondents across generations still prefer working from a desk when in the office.

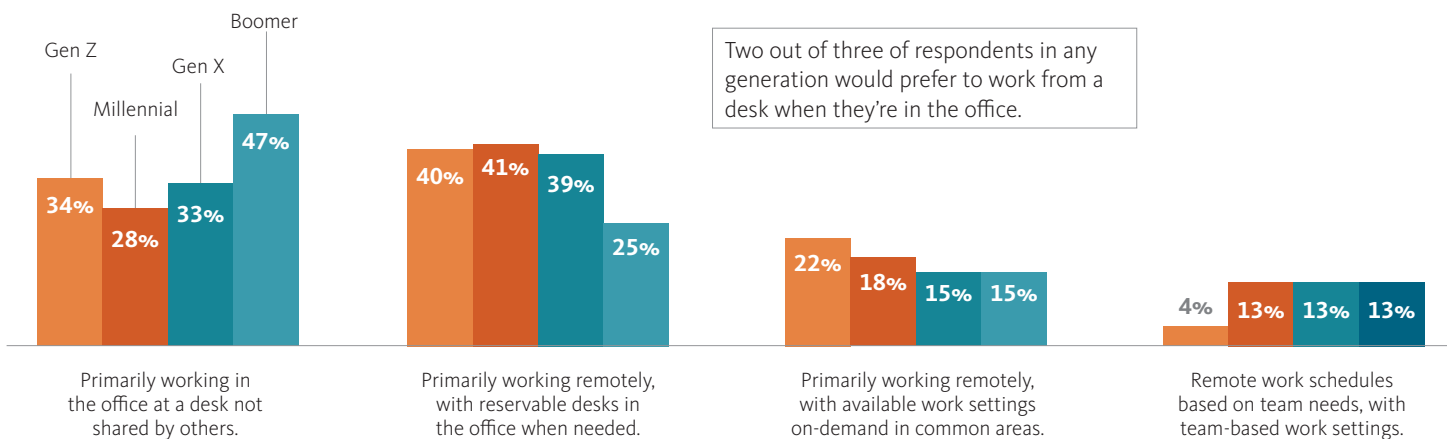
For younger workers, remote work doesn't mean working from home—it means working from anywhere.

When working remotely, where do you like to spend your time?



Most workers still prefer a desk when coming to the office, but younger workers are open to sharing desks to increase flexibility.

Percent who would prefer each scenario when in the office.



Younger Workers Value the Office Differently

Gen Z and Millennial workers expect coworking and third places to play a central part of their post-pandemic workdays.

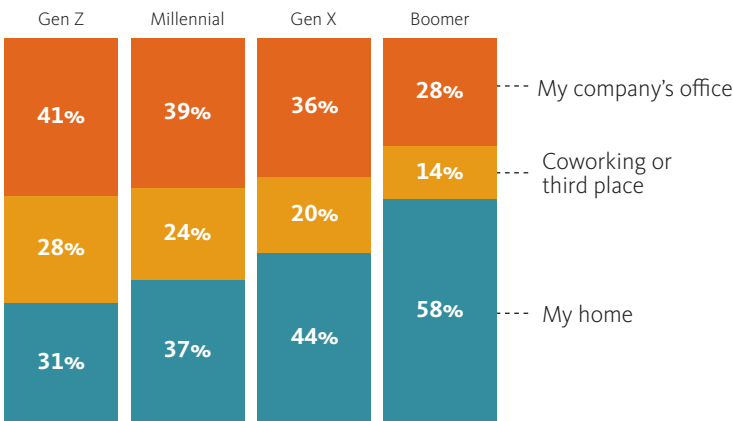
While older workers tend to see work as a duality between home and the office, Gen Z and Millennial workers have fully embraced mobile and anywhere work. They clearly see third places and the city as extensions of the workplace, and prefer to meet their coworkers in-person at these spaces to socialize and receive feedback.

Half of Gen Z respondents, compared to only one in six Boomers, would prefer to give and

receive feedback in-person, at a coworking site, or third place. Over half of Gen Z respondents would prefer to socialize with colleagues in-person at a coworking or third place compared to only a third of Boomers. And Gen Z respondents are least likely to prefer thinking/ideating from home, instead preferring the office or other non-home locations more than any other generation.

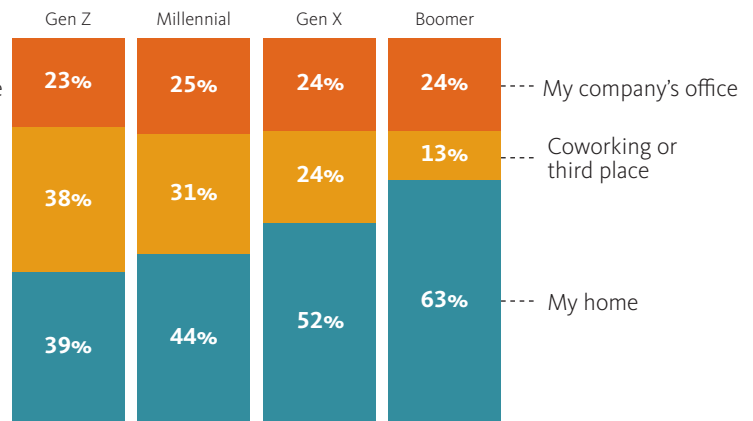
Younger generations are more likely to want to think/ideate at the office, as well as other third-place locations.

Percent who prefer to think/ideate in each location.



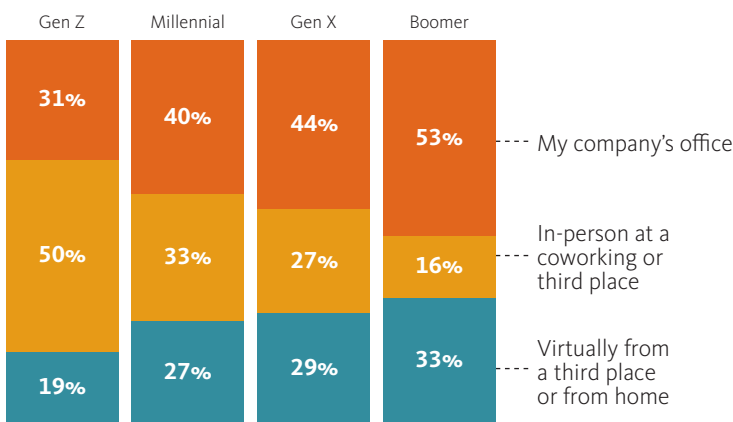
As cities open up, younger generations prefer to reflect/conceptualize away from the office—but also away from home.

Percent who prefer to reflect/conceptualize in each location.



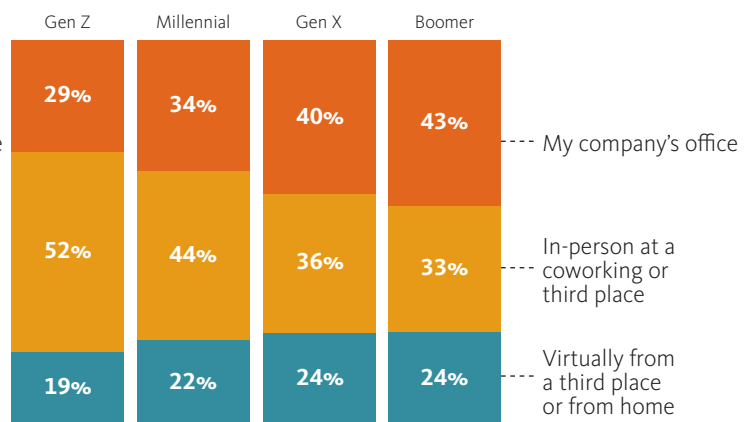
Younger generations prefer to receive feedback in-person, often in coworking or third places.

Percent who prefer to receive/give feedback on project work in each location.



For social connections, younger generations prefer in-person connection away from the office.

Percent who prefer to connect/socialize with colleagues in each location.



Younger Workers Value the Office Differently

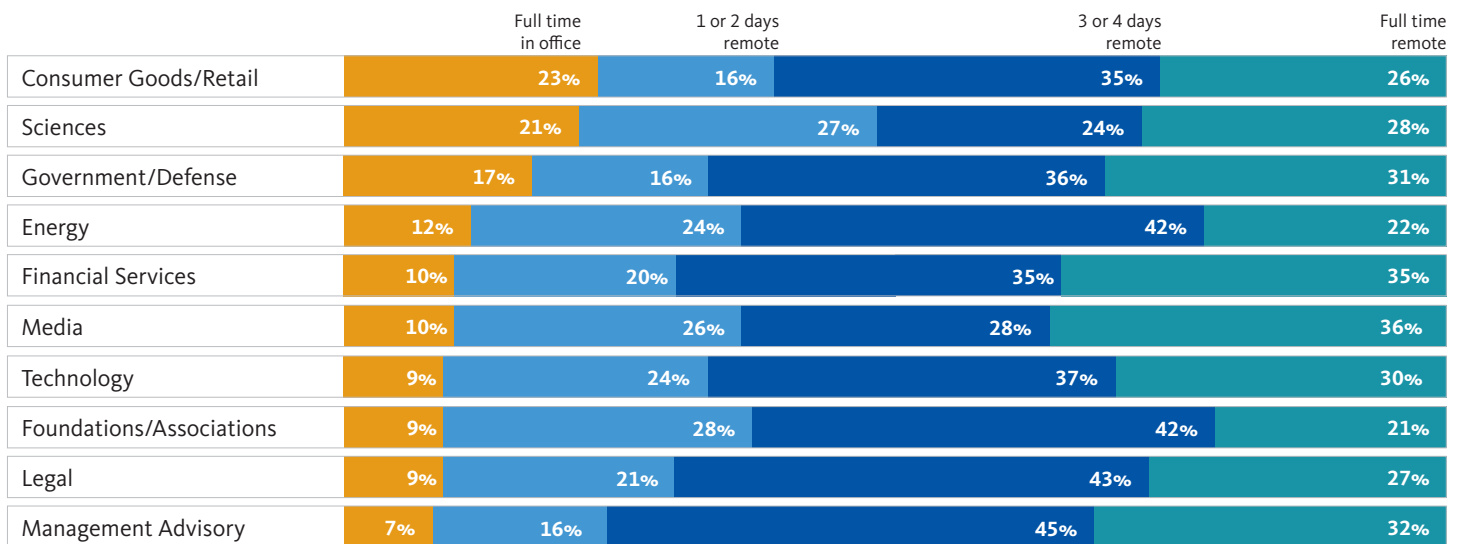
With workers still focused on a hybrid work future, we need to create a workplace empowered by choice and autonomy.

The preference for a mix of in-person and remote work broadly holds true across industries for U.S. workers—but all companies are far from created equal. Consumer goods, sciences, and government/defense workers are most likely to prefer to be full time in the office post-pandemic; financial services, media, and management advisory are most likely to prefer to be full time at home.

Managing this range of preferences will require a flexible approach to hybrid work that focuses on empowerment and choice. This focus on choice must align with what workers are focused on to be comfortable returning--health measures, increased privacy and distraction mitigation, and technology upgrades.

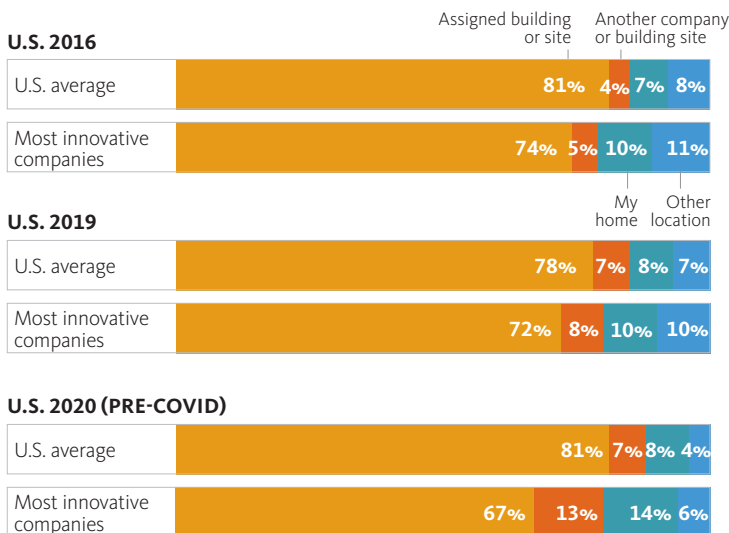
There are clear differences in work location preferences by industry.

Preferred number of days working from the office vs. remotely, by industry.



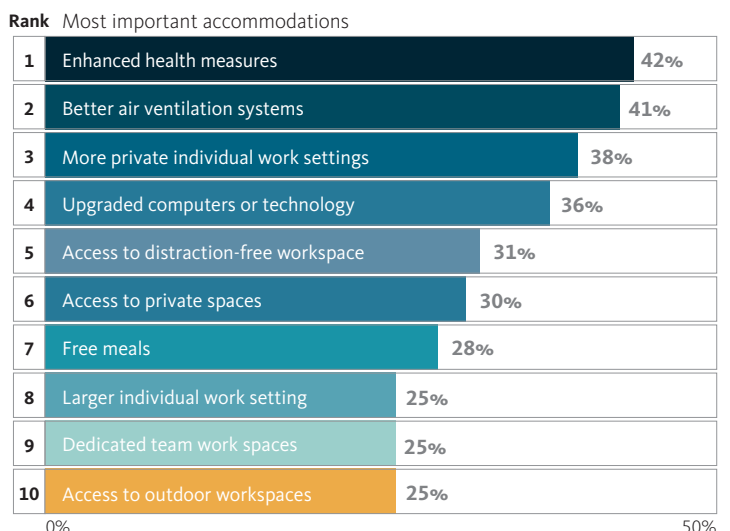
Even pre-pandemic, U.S. employees were not in the office 100% of the time.

Percent of time spent in each location during an average workweek over time.



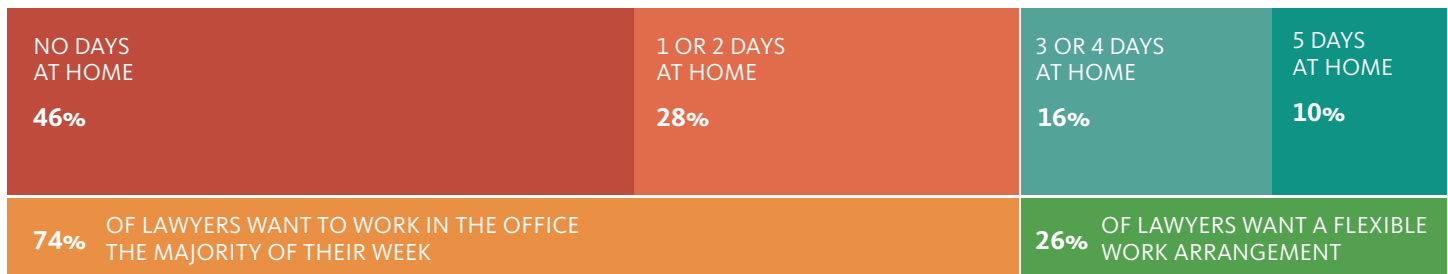
Increasing health measures, and privacy, are important to a comfortable return.

Percent who ranked each item as important to their comfort.



Only 10% of U.S. lawyers want to work from home full-time. Most want to return to the workplace, but with critical changes.

DO YOU PREFER TO GO BACK TO THE OFFICE OR CONTINUE TO WORK FROM HOME?



They want the higher job satisfaction that comes with working with others in-person as well as opportunity for spontaneous face-to-face meetings and increased interpersonal contact with colleagues.

There is an opportunity for law firms to lean into new ways of working that were previously thought out of reach, and potentially reduce real estate assigned to this subset of workers.

The lessons learned from the experience of working from home during COVID-19 offer an unprecedented opportunity to rethink the future of the legal workplace. Only 9% of U.S. lawyers had worked from home regularly before this experience, and only about one third had the choice to work from home. While many of the effects of COVID-19 on the workplace are still unfolding, some points are emerging clearly from our data:

- 1) Most lawyers want to come back to the office.**
- 2) Lawyers expect crucial changes to the workplace before they're comfortable returning.**

In the short term, most law firms are not rushing back to the office, and will need to find ways to continue to maintain culture and connectivity over a distributed workforce.

The preference to come back to the office in the longer term is consistent with Gensler's workplace research data collected regularly since 2005. Lawyers with choice in where to work prior to COVID-19 spent 76% of their average work week in the office compared to only 11% working from home, overwhelmingly choosing the office as their preferred place to work.

METHODS The survey of 2,300+ U.S. workers was conducted online via an anonymous, panel-based survey from April 16th to May 4th, 2020. Respondents were required to be working full time for a company of 100 or more people, to have worked in an office environment prior to COVID-19, and to be currently working from home. Responses were evenly distributed across 10 industries and represent a wide range of seniority levels, roles, ages, and geographies across the U.S. Legal industry respondents include lawyers and senior management at law firms.

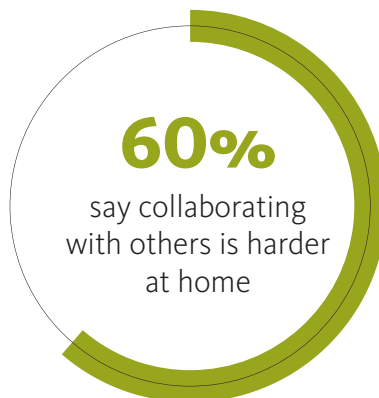
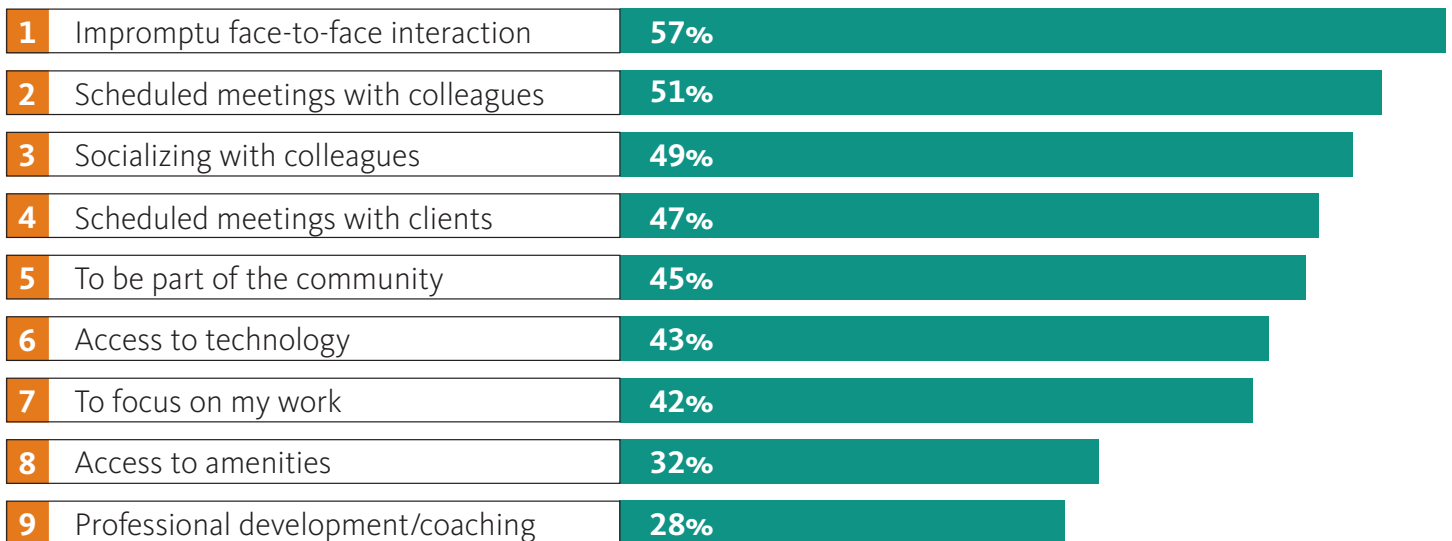
What do lawyers miss from the office? Meeting and connecting with colleagues face-to-face and access to the tools and spaces that support their work.

When lawyers do eventually return to the office in force, they will be looking to rekindle community and social connection. Nearly all workers list people-focused reasons as most important for coming into the workplace, with little variation across industries. Despite the rapid adoption of virtual collaboration technologies, people still clearly value face-to-face interactions over virtual ones, in many cases, and miss the company of their coworkers.

When asked what they miss most about working from the office, three out of four legal survey respondents said “the people”. Lawyers also report that certain activities, such as collaborating and staying informed about what others are working on, are harder to do at home, underscoring the value of physical presence.

The top reason lawyers want to come to the office: the people.

Respondents were asked to rank what they believe to be the most important reason(s) for coming into the office.

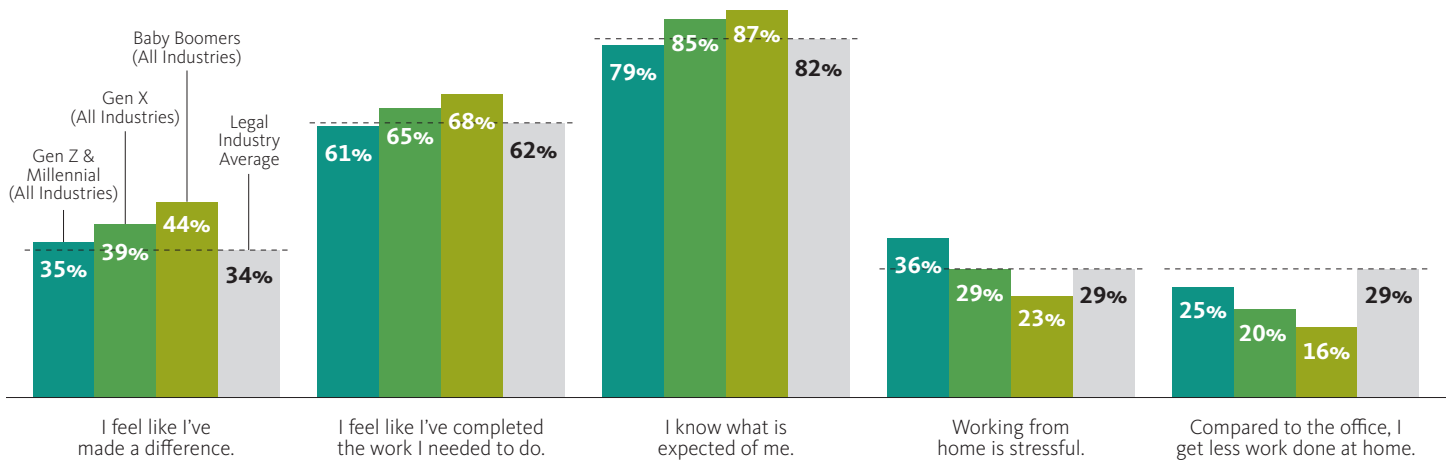


Younger generations across 10 industries are less productive at home and less satisfied with the work-from-home experience.

Most work from home trends seen in the 10 industries surveyed are mirrored or somewhat more pronounced in the legal industry. While the generational data in this survey is not exclusive to law firms, findings from the U.S. workforce at large may be instructional for firms trying to understand how to support both new and seasoned lawyers. Millennial and Gen Z workers should have had a leg-up working from home, as they tend to have more

experience working and socializing virtually. However, younger generations came into this experience having worked from home less often in the past and, overall, with less optimal work-from-home environments. Younger workers report a more challenging experience working from home than their older peers. They are less aware of what's expected of them and how their work contributes to organizational goals.

Across all industries, younger workers are struggling the most. Nearly a third of lawyers report getting less work done while at home.



Younger respondents are struggling with distraction the most. Nearly half of lawyers find avoiding distractions harder at home than the office.

	HARDER AT HOME	THE SAME	EASIER AT HOME
Avoiding Distractions	50% Gen Z & Millennial (All Industries)	22%	28%
	41% Gen X (All Industries)	24%	35%
	33% Baby Boomers (All Industries)	26%	41%
	45% Legal Industry (All Generations)	21%	34%
Maintaining Work-Life Balance	37%	21%	42%
	33%	23%	44%
	25%	31%	44%
	36%	22%	42%

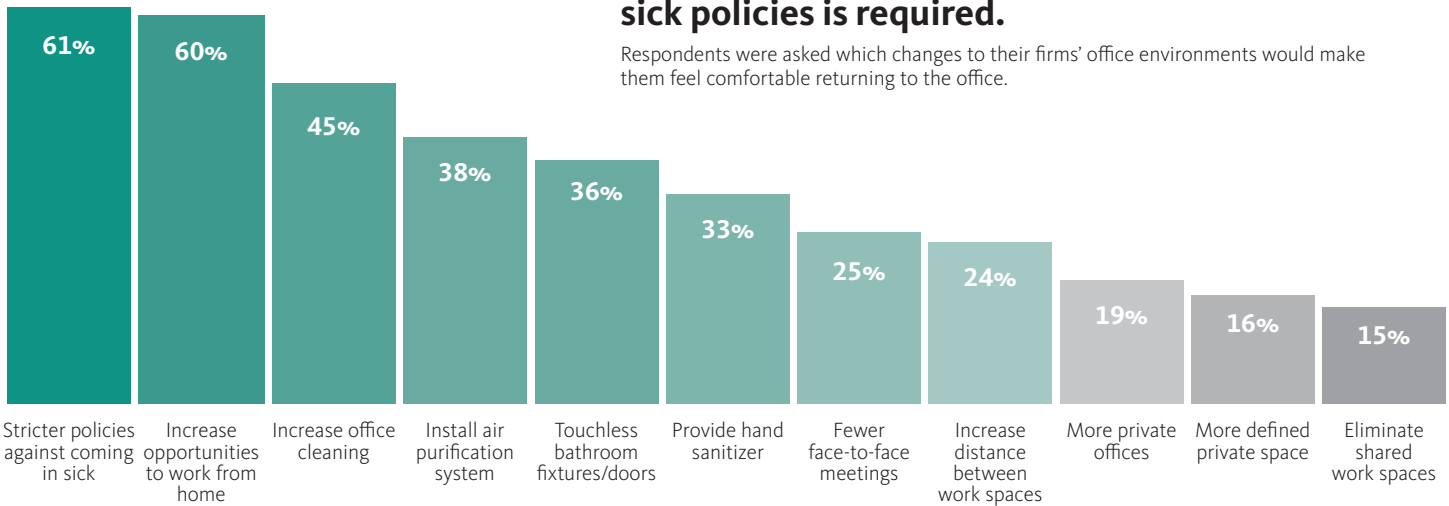
Many law firms will move cautiously towards returning to the workplace. Initial return protocols will be methodically codified across real estate portfolios.

The private office, ubiquitous at most law U.S. firms, inherently promotes physical distancing. But lawyers will want their workplaces to adopt further measures in response to COVID-19. The most important workplace changes appear to be policy-based and include stricter policies about staying home when sick and increasing opportunities to work from home. Cleaning and other efforts to establish social distancing rank next. Broadly, lawyers are very receptive

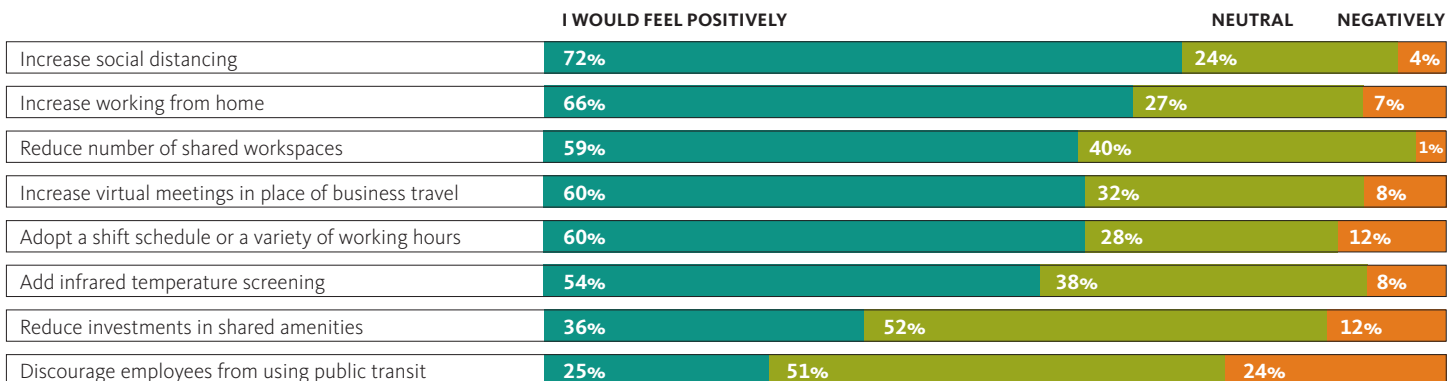
to a wide swath of both policy and design changes. Not only do they want their employers to adopt social distancing practices, they are also open to adopting a shift schedule or a wider variety of working hours. They feel less positively about reduced investment in shared amenities and are also wary of being discouraged from using public transit.

For lawyers to feel comfortable coming back to the office, a combination of more cleaning and stricter sick policies is required.

Respondents were asked which changes to their firms' office environments would make them feel comfortable returning to the office.

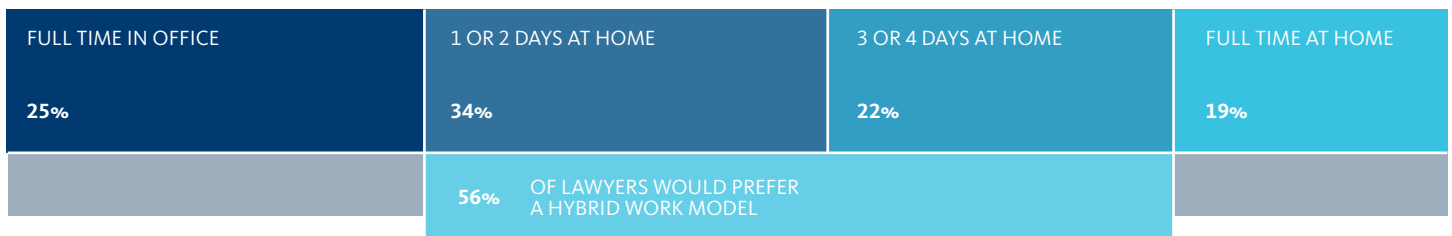


Increased social distancing and continued support for mobile work are viewed positively by lawyers.



U.S. lawyers want the job satisfaction that comes with face-to-face meetings and interpersonal contact with colleagues. They also want the benefits of flexibility they've enjoyed while working from home.

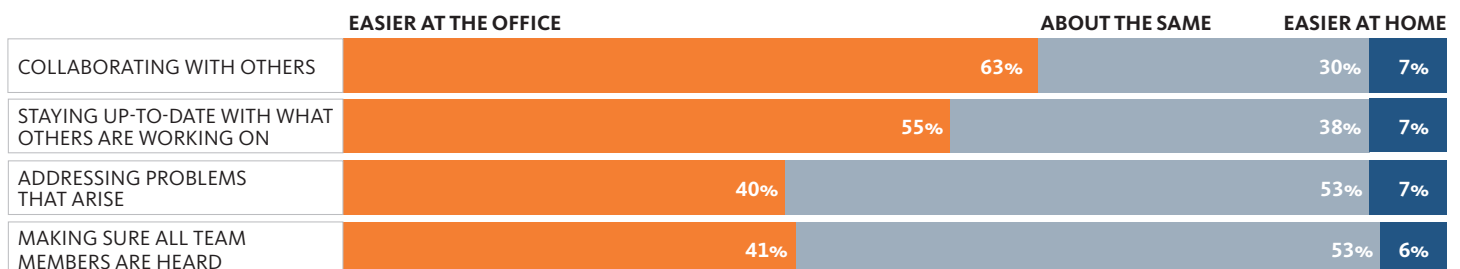
HOW MANY DAYS WOULD YOU PREFER TO WORK FROM THE OFFICE VS. FROM HOME?



As many U.S. lawyers have now spent more than six months working during the COVID-19 pandemic, the impacts and realities—both good and bad—of working from home are settling in. **Most would still prefer to work from the office for the majority of a normal week—but they'll bring new expectations around flexibility, privacy, and space sharing with them as they return.** Only 20% of U.S. lawyers want to work from home full time; over half would prefer a hybrid of working from the office and from their home as they look to the future. What does this mean for the future of work and the workplace?

Collaboration, awareness, problem solving, and inclusive communication are where the office excels.

Percent of lawyers who agree each activity is harder, the same, or easier to do at home, compared to the office.



METHODS This survey of 2,300+ U.S. workers was conducted online via an anonymous, panel-based survey from July 22 to August 24, 2020. Respondents were required to be working full-time for a company, organization, or firm of 100 or more people, and to have worked in an office environment prior to the COVID-19 pandemic. At the time of data collection, respondents worked in a variety of scenarios: full time from home, part-time in the office (hybrid work model), and full time in the office. Respondents were evenly distributed across 10 industries and represent a wide range of seniority levels, roles, ages, and geographies across the U.S. For reference, respondents were categorized into the following generational cohorts: Generations Z and Millennials (18–39 years old), Generation X (40–54), Baby Boomers (55 and older). U.S. legal industry respondents include lawyers and senior management at law firms.

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The Hybrid Future of Work

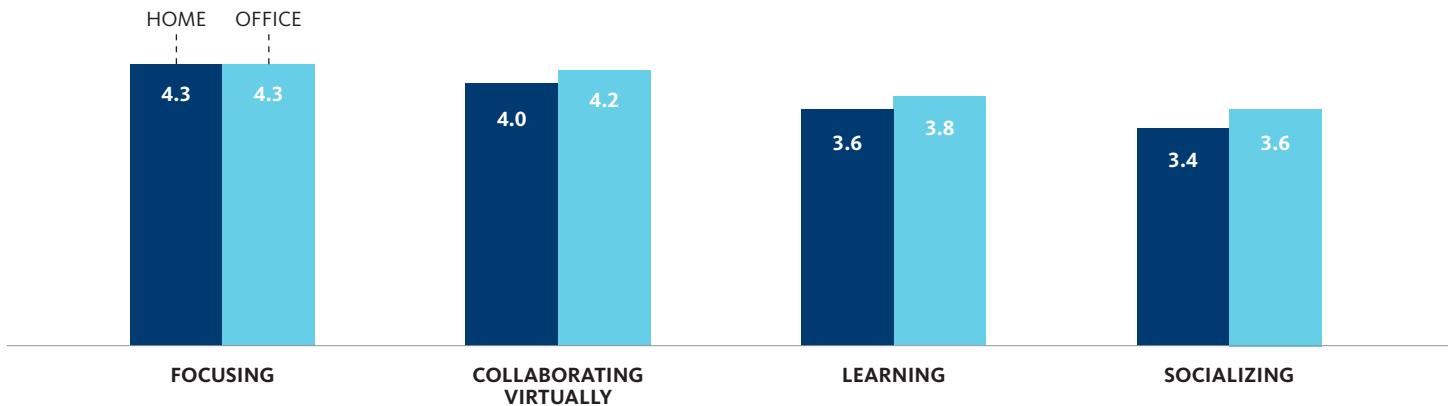
Few lawyers had worked from home regularly prior to COVID-19. Most now see home environments as effective environments to work.

While occasional working from home was common prior to Covid-19, only about 9% of lawyers worked from home as a regular part of their typical workweek. When comparing home and office environments, the home performs equally well for focus work, the predominate work mode for a lawyer. The office is still viewed as a catalyst for collaborative work and social relationships; working from home can't easily replace the power of in-person work with colleagues.

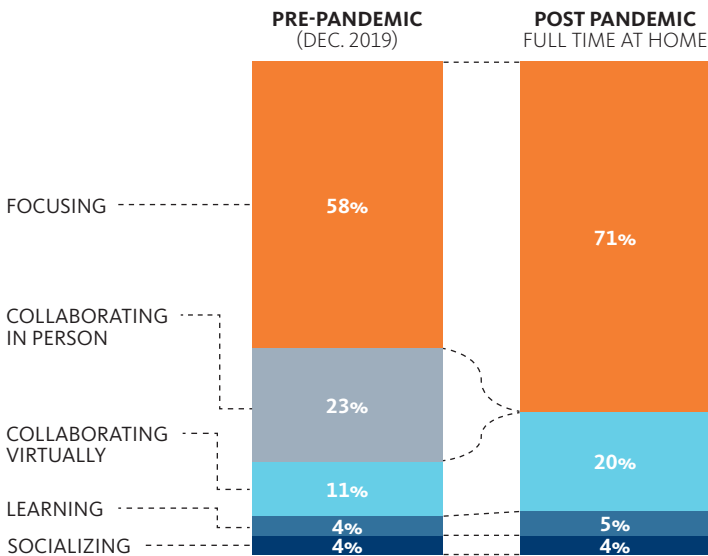
Notably, total collaboration while working from home is down compared to December of 2019. As some law firms start to envision a future where remote working remains a meaningful part of the legal workflow, they will need to look at how and why particular environments can encourage desired behaviors such as mentorship and building community. We are beginning to see how working from home is raising the bar for the future legal workplace.

For the most part, working from home has not impacted legal industry productivity.

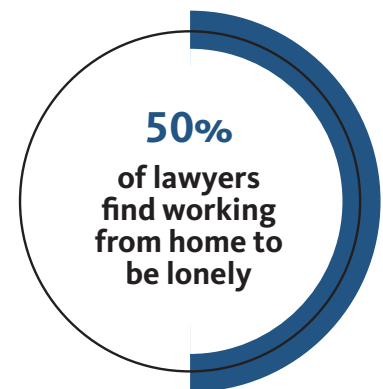
The work mode effectiveness of both home and office environments.



Legal industry workers spent 1.5x more time collaborating before the pandemic compared to working from home.



Lawyers continue to find working from home lonely, and miss the company of their colleagues.



The Hybrid Future of Work

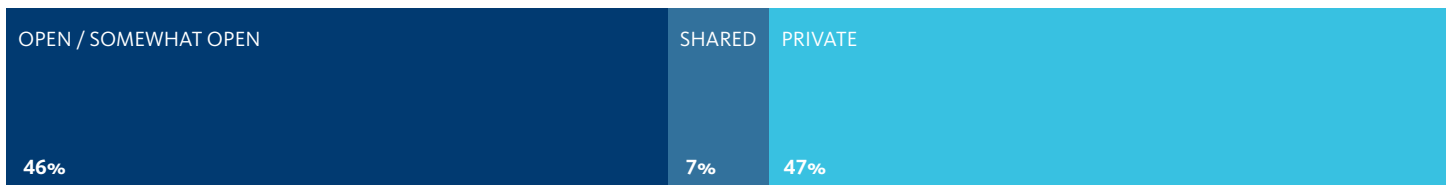
U.S. lawyers are wary of desk sharing, but some are willing to trade an assigned office for greater opportunity to work from home.

More so than any other industry, lawyers continue to prefer private environments. The private office remains the hallmark of most U.S. legal workplaces. When asked about their receptivity to unassigned seating, the vast majority of lawyers are not interested. This is unchanged pre and post pandemic. But if the question is rephrased to ask if they would be willing to trade an assigned seat for more flexibility to work remotely, lawyers express significantly more interest.

There is an opportunity for some firms to reduce real estate costs based on this demand for increased mobility. Some firms are now considering redefining how they work by planning for unassigned “day offices” for highly mobile lawyers. When combined with the right amenities and technologies, this type of agile workplace caters to a newfound freedom and autonomy to work from anywhere, while saving space by reducing the number of offices needed for a given population.

What is your ideal physical workplace environment?

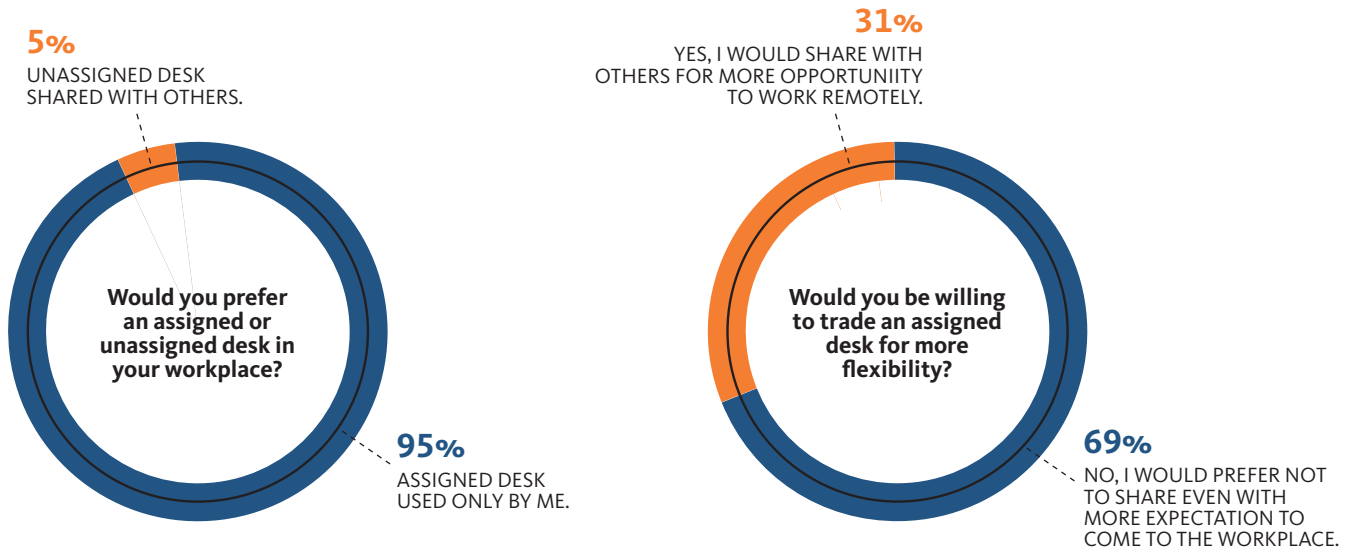
10 INDUSTRY AVERAGE



LAWYERS



U.S. lawyers dramatically prefer assigned seating. However, almost 1/3 are willing to trade an assigned seat for heightened flexibility.



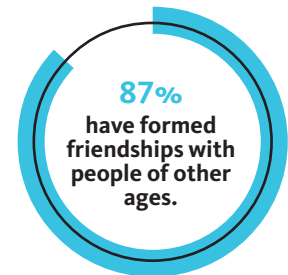
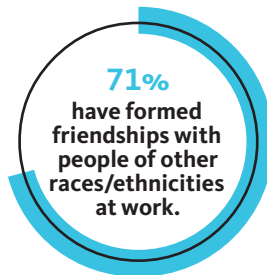
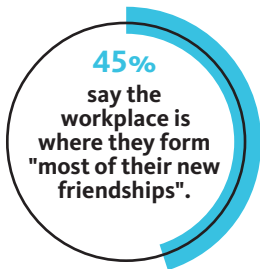
The Hybrid Future of Work

The physical workplace is a key place to experience and foster diverse and positive personal and professional relationships.

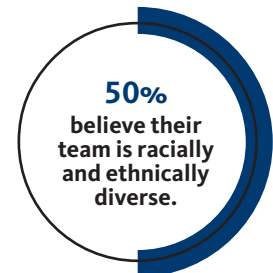
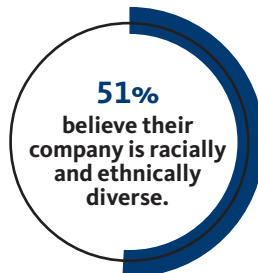
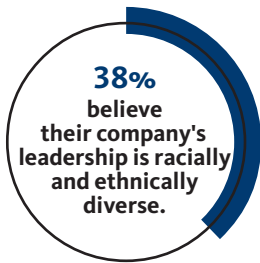
Women and people of color have been under-represented in the legal industry. While a slim majority of lawyers believe their firm is diverse, less than half say the same about their firm's leadership. In contrast, a majority of lawyers report the workplace plays a role as a primary place where people create friendships with those of different races and ethnicities.

The upsides to racial and ethnic diversity are more than just interpersonal. Workplaces that consider employee's individual working styles and needs, and reinforce inclusive policies create a sense of belonging. Across all industries, those with diverse organizations feel more empowered, have greater job satisfaction, and believe their company is more aligned with their personal values.

The workplace is where lawyers form diverse relationships across races, ethnicities, and generations.



Slightly more than half of lawyers see their company as racially and ethnically diverse, though leadership diversity lags behind.



Workers in diverse organizations across all industries are more engaged and empowered, and feel more positively about their companies.

Percent of respondents for whom the item is true by level of organizational diversity.

