HAWORTH

Global Workplace Study

Understanding and Navigating Hybrid Work



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Global Workplace Study

A new understanding of where and when work happens continues to be top of mind for decision makers and workers alike. Underpinning the broad range of options available to many workers is the employee experience—the human-centered considerations that contribute to people doing their best work.

A hybrid model that supports a blend of in-office, remote, and on-the-go workers is likely favored for its flexibility. However, hybrid work is not a one-size-fits-all solution.

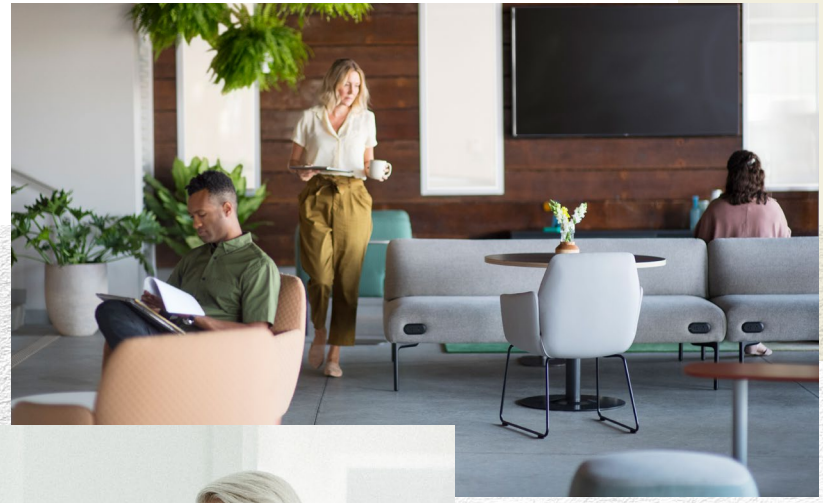
The nuances and implications must continually be explored to inform decisions that shape the future of work. One aspect that organizations can control is the design of their spaces, which can impact engagement, performance, and well-being.

To investigate the links between workspace design and human performance, Haworth undertook a global study across three regions—North America (US and Canada), APAC (Asia-Pacific), and EMEA (Europe, Middle East, and Africa)—to better understand the state of hybrid work through policy and its impact on space.

Customers Ask:
How do we optimize employee engagement and productivity? How do we create spaces that attract and retain talent?

INSIGHT #1

Hybrid Work Will Persist & Evolve



Despite differing definitions of hybrid work, more than 84% of organizations across the globe accept this terminology to describe the mix of working at home, in the office, or in remote locations.

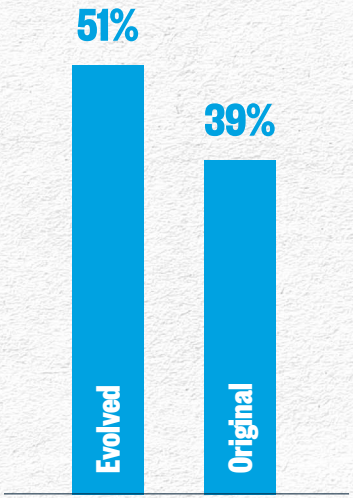


77%

of organizations

formally adopted a workplace hybrid policy. Simply put: People work in more than one place.

To keep up with changing expectations, 51% of organizations have evolved their original hybrid policy, while 39% have kept their original version.



43% of organizations have policies dating back to 2020–2021, and the same number of organizations have policies less than two years old.

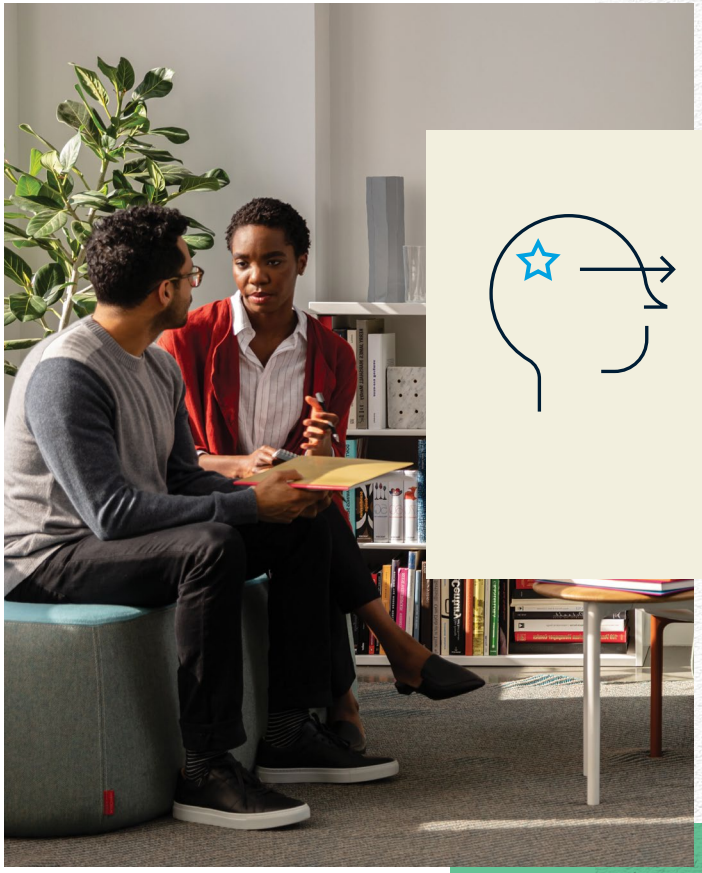
The degree and nature of work flexibility is something that is still being experimented with globally. For example, 38% of organizations with hybrid work policies offer full flexibility, with unrestricted hours and choice of work location. A similar-sized pool of respondents requires core hours, during which every team member must be available in the office. Finally, 14% of organizations with flexible policies support four eight-hour days per week.

Directionally, it appears policy changes will continue over time, as leadership and employees wrestle with the need to formalize expectations with the potential to impact performance, recruitment, and retention of top talent.

INSIGHT #2

Local & Regional Differences Shape Policy

While every region surveyed has a similar percentage of organizations with hybrid work policies, there are clear differences between regions in the details of these policies.



Hybrid work is more often managed by an executive or organizational mandate in North America (73%), compared to EMEA (62%) and APAC (60%). Given the more hierarchical nature of APAC organizations, this finding is unexpected.



Aligning to the vision of leadership is the primary motivator for initially establishing a policy in APAC, compared to employee experience and attraction in EMEA and NA.

However, the formality of policy adherence seems to be higher in EMEA. More organizations that require pre-approval of remote/hybrid work are in EMEA (68%), compared to a similar percentage in NA (58%) and APAC (57%).

Budgetary considerations differ between regions. NA clients (31%) were by far the least likely to offer any sort of allowance, stipend, or furniture support for remote workers compared to EMEA (48%) and APAC (47%). On the other hand, EMEA was much more likely than other regions—by 15 to 20%—to have budgeted for a workspace upgrade or change to better support hybrid work.

North American organizations have updated their policies more recently than the rest of the globe. Relatedly, EMEA and APAC generally began hybrid policies earlier than NA. Combined, these findings suggest that organizations outside of NA may be more stable in their policies.

INSIGHT #3

Improving Human Performance Is Still the Primary Motivator

The impact on people is clearly the main reason for hybrid workplace policies around the world. Human-centric outcomes that support the employee experience and attract employees overwhelmingly outweigh financial implications. In fact, fewer than 10% of organizations were motivated by cost savings related to hybrid work.



The moderate adoption of stipends and allowances for working away from the office is further supporting evidence, representing a direct cost to better support employees no matter where they are in the world.

What is most compelling are the success metrics used to determine how well hybrid policies are working.

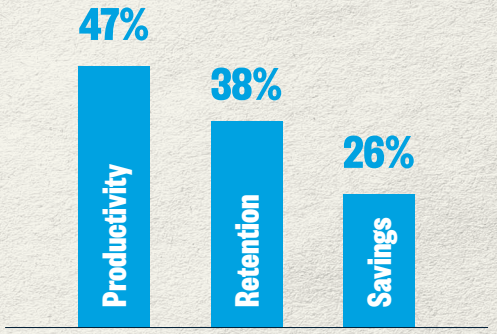


54% of organizations

across the globe selected employee engagement as the number-one measure of success.

Other popular answers included productivity (47%) and employee retention (38%). Only 26% said real estate or cost savings were defining metrics of success.

This suggests employee satisfaction is the focal point for successfully improving performance, over operations and capital allocation.



INSIGHT #4

Acoustics Is Still a Top Pain Point

In every region, most space design attributes related to hybrid work were rated as "working well," with one notable exception.

48%

of organizations

worldwide cited poor acoustics as an issue.



"Etiquette in the office is a problem probably due to working from home for two years mainly by yourself, so people are generally louder than before."

–Survey participant

While this is not a new problem, the purpose of the office has shifted to collaboration and connection. This is reflected in an increase in group spaces and ancillary spaces seen across the globe. In North American focus group sessions, for example, we heard of an increased sensitivity to noise due to the growing number of virtual calls occurring in the open plan office.

One way to help solve the distractions of noise in the workplace is by ensuring there are spaces designed for focus work and dedicated spaces to take phone calls privately.

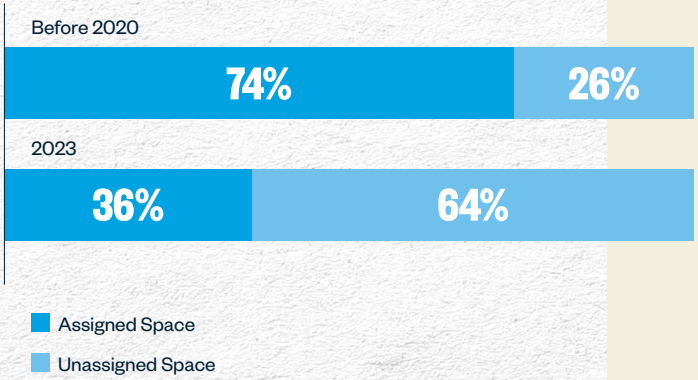
Supporting data points to the percentage of organizations that reported an increase in both the number of focus spaces (59%) and the number of private booths or office pods (62%) in an attempt to reduce the impact of acoustic distractions.

The takeaway: Without access to enclosed spaces, employees have difficulty focusing, which may impact productivity and well-being.

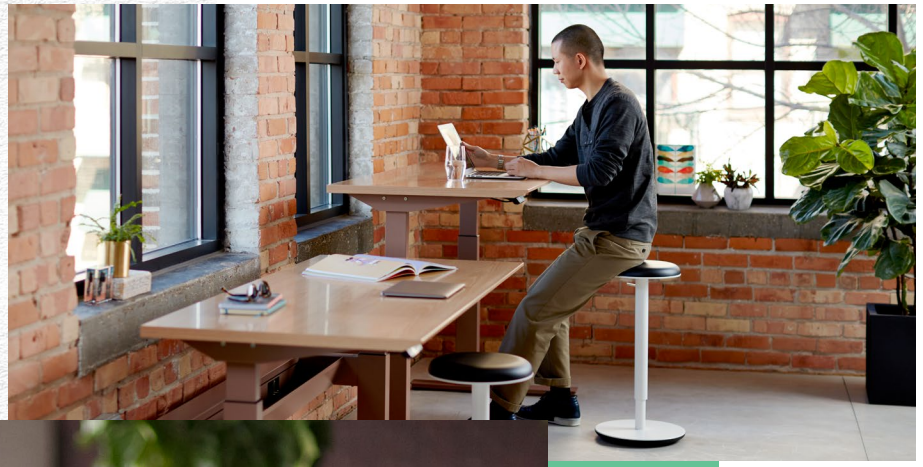
INSIGHT #5

The Ratio of Assigned-Unassigned Spaces Has Flipped

Perhaps the most significant shift in space allocation is the dramatic change in assigned to unassigned space.



Today, that ratio has flipped. The magnitude of the shift is globally consistent. This is supported by data from all regions showing an increase in activity-based work planning, which is typically in unassigned spaces.





Additionally, 72% of organizations said they are increasing the number of shared workstations, and 69% said they are increasing the number of temporary workstations.

Overall, unassigned workstations or workspaces maximize flexibility to accommodate employee preferences, hybrid policy, and activity changes, as well as a varying day-to-day in-office population.

INSIGHT #6

Space Changes Lead to Higher Satisfaction with Hybrid Policy





Organizations that have made changes to their workspaces since 2020 have a higher satisfaction level with hybrid workplace policies than those that have not updated their office spaces.

84%

of organizations

that updated space to better support hybrid work are satisfied with how hybrid is going, a 15% higher rating compared to those that did not make space changes.

Floor plans have shifted, with EMEA seeing the greatest change and APAC remaining consistent in allocation of spaces.

For all organizations before 2020, 60% of the floor plan was allocated to individual workspaces, dropping to 49% in 2023. Group spaces (enclosed and open meeting rooms) experienced a significant jump from 26% to 32%, along with spaces for socializing and restorative activities (lounge and community spaces), which increased from 14% to 19%.

In Summary

It's clear to see that the global era of hybrid work is upon us. For the workplace to live up to new expectations, the frequency and quality of face-to-face interactions in the office can be enhanced through well-designed spaces. Focusing on human performance will enhance the overall experience of work.

Haworth will continue to track trends over time and share our findings to inform space design and its impact on performance.

Methodology

Data was collected in two stages. In early 2023, a sample of office workers in North America (US and Canada) completed a survey on hybrid work. Researchers also conducted interviews with clients in six key architecture and design markets.

Haworth's international ideation team conducted the survey again in 2023 with a sample of global organizations. Results were aggregated into three regions: North America, APAC (Asia-Pacific), and EMEA (Europe, Middle East, and Africa).

Haworth's Workplace Research & Insights team investigates, explores, and tests the connection between product and workplace design, human behavior, health, and performance—while being acutely tuned to the user experience. We translate, apply, and share what we learn to inform product development and help our customers shape their work environments.

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