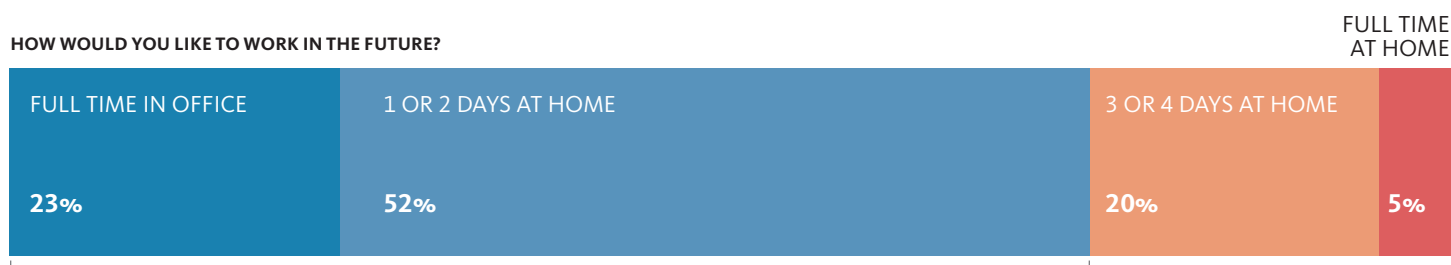


Office workers in France still want to spend most of their workweek at the office. They also want the flexibility to work from home.



3 out of 4 respondents want to work the majority of the week at the office.

The vast majority of office workers in France now have the experience of working from home as a result of the COVID-19 pandemic, and most still prefer working from the office for the majority of their workweek. They also, however, see working from home as a positive addition to their work lives, and a behaviour they hope to continue in the future. Workers are not asking for a sweeping change to the status quo, but for flexibility when they need it: over half of workers in France would ideally like to spend 1 or 2 days at home during a typical workweek. As France looks towards a post-COVID workplace, key findings to consider are:

1. Workers don't want a revolution in how they work; they want an evolution to include added flexibility.
2. The workplace's value is clear in the minds of workers in France; it should continue to be the key location for most work activities.

METHODS The survey of 2,300 workers in France was conducted via an anonymous, panel-based survey from July 9 to August 24, 2020. Respondents were required to have worked in an office prior to COVID-19. Responses were distributed across eight industries and represent a wide range of seniority levels, roles, ages, and geographies across France.

For media inquiries, please contact Kimberly_beals@gensler.com / For more from the Gensler Research Institute, please visit www.gensler.com/research

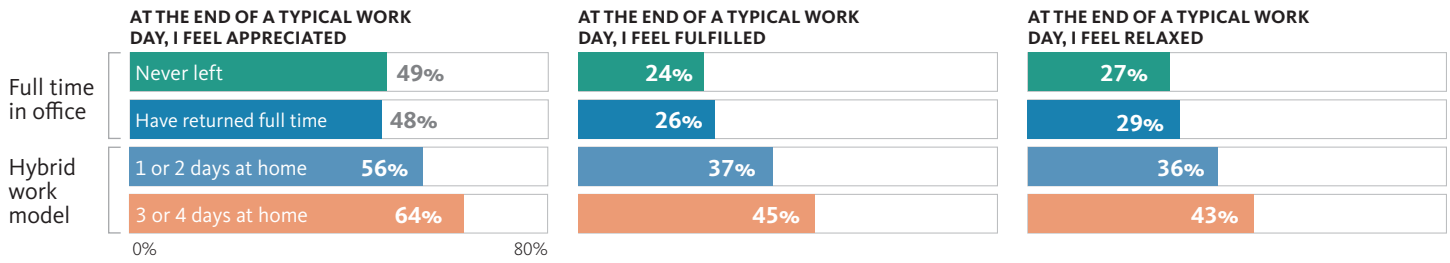
Adopting a hybrid work model presents distinct benefits and challenges for workers in France.

The ability to work both at home and in the office offers a balance that many workers need. Those who are already working in a hybrid model appear to be seeing distinct benefits. Most report greater emotional wellbeing, including feeling more appreciated, relaxed, and fulfilled. They also report higher job satisfaction, and likelihood to recommend their company.

There is, however, a point of diminishing returns for increased flexibility. Those who spend the majority of their workweek at home feel more disconnected from team members, excluded from team interactions, and are more likely to feel stressed. This suggests that the optimal balance of working from home for workers in France is 1 or 2 days per week.

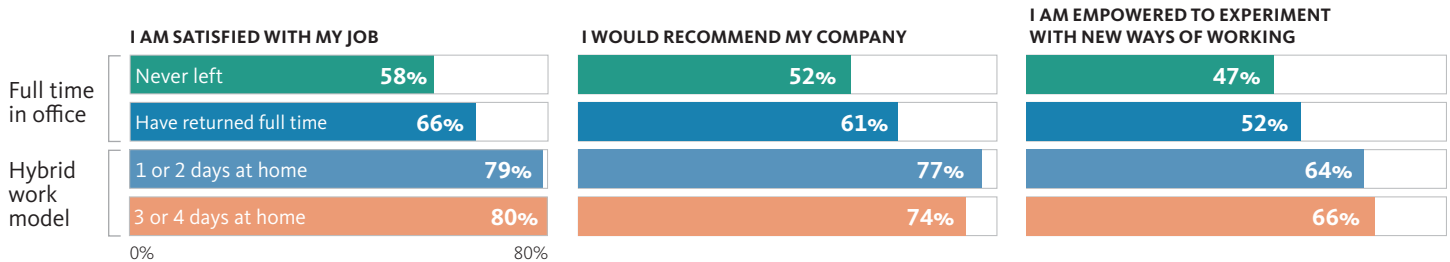
Workers who spend more time at home feel more fulfilled, appreciated, and relaxed at the end of the day.

Percent who agree with each statement, by current work scenario.



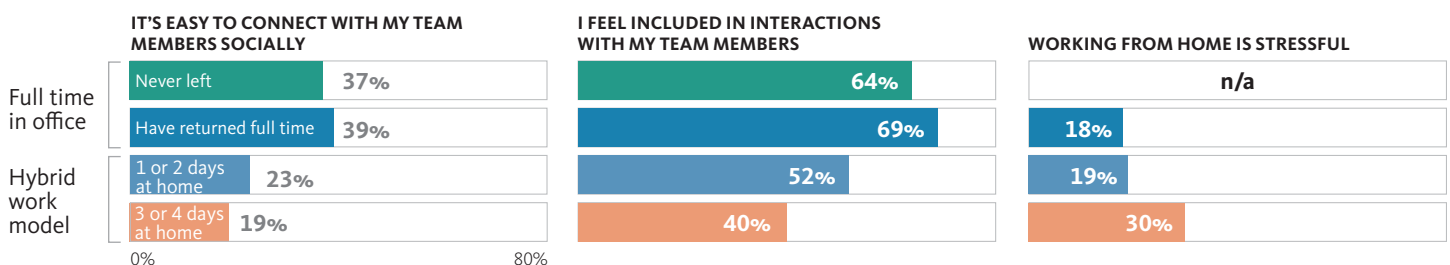
Working from both the office and home also contributes to job satisfaction, likelihood to recommend one's company, and sense of empowerment.

Percent who agree with each statement, by current work scenario.



Working from home too much can hinder social connection and sense of inclusion. For many, it can also feel stressful.

Percent who agree with each statement, by current work scenario.

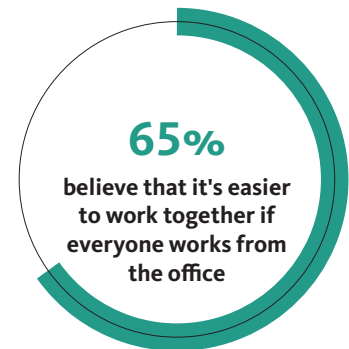
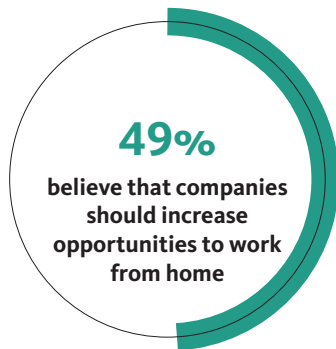


Flexibility should be more than a privilege. Its benefits should be made available to all workers.

The flexibility to work from home carries benefits that should be available to all workers. Nearly half of workers believe that their companies should increase opportunities to work from home. Our results indicate that while most are satisfied with their experience of working from home, workers are not looking for a shift away from the office. Most believe it's easier to work together if everyone is in the office together.

Prior to COVID-19, those in higher-level positions had greater flexibility to work from home, and they've leveraged flexibility during COVID-19. Those in Professional/Technical and Administrative positions are currently more likely to be working from the office full time, though the majority of these workers would prefer the flexibility to work from home 1 or 2 days a week as well.

Employees are satisfied with their work from home experience, but they still believe it's easier to get work done when everyone is in the office together.



Most workers want to work from home 1 or 2 days per week. Senior-level leaders are the most likely to already be working this way.

	Full time in office (never left)	Full time in office (have returned)	1 or 2 days at home	3 or 4 days at home	Full time at home
Senior Leadership/Executive					
Current work model	4%	9%	47%	35%	6%
Ideal work model	8%		69%	22%	3%
Manager/Director					
Current work model	11%	31%	26%	22%	9%
Ideal work model	11%		59%	24%	7%
Professional/Technical					
Current work model	40%	36%	13%	6%	4%
Ideal work model	31%	44%	19%	6%	
Administrative					
Current work model	32%	47%	15%	4%	3%
Ideal work model	23%	54%	18%	5%	

Collaboration is the key reason people want to return to the office—but they expect the ability to focus there, too.

The workplace should support collaboration and socialising but that does not mean it should not also support focus work. While respondents have been succeeding at doing their jobs from home, workers still recognize that it's easier to collaborate with others in person. 65% of respondents think it's easier to work together if everyone works on-site.

The top reasons to come to the office underscore the need for balance between collaboration and focus. While working in-person with colleagues is at the top of the list for respondents in all ideal work model groups, those who would prefer to work full time from the office are even more likely to prioritize focusing on their work.

Collaborating, and socialising, with colleagues are the two most important reasons workers see for coming to the office—particularly for those who want to work in a hybrid scenario.

Most important reasons for coming to the office, by employees' ideal work scenario post-COVID.

Workers continue to see focused work as a key reason to come to the office—particularly those who want to return full time.

The more time workers want to spend working from home, the more highly they value brainstorming with colleagues in person.

Rank	Ideally full time in office	Ideally 1 or 2 days at home	Ideally 3, 4, or 5 days at home
1	Working in person with my team/colleagues	Working in person with my team/colleagues	Socialising with colleagues
2	To focus on my work	Socialising with colleagues	Working in person with my team/colleagues
3	Socialising with colleagues	To focus on my work	Brainstorming/ideating with colleagues
4	Access to specialised technology and support	Access to specialised technology and support	To focus on my work
5	To meet with/entertain clients/customers	Brainstorming/ideating with colleagues	Access to specialised technology and support
6	Scheduled, in-person meetings with clients/customers	Scheduled, in-person meetings with clients/customers	To feel as part of the organization
7	To feel as part of the organization	To feel as part of the organization	Scheduled, in-person meetings with clients/customers
8	Brainstorming/ideating with colleagues	Access to daily technology and support	Access to daily technology and support
9	Access to daily technology and support	Impromptu, face-to-face connections	To meet with/entertain clients/customers
10	Impromptu, face-to-face connections	To meet with/entertain clients/customers	Impromptu, face-to-face connections
11	Access to workplace lifestyle/wellness amenities	Access to workplace lifestyle/wellness amenities	Access to workplace lifestyle/wellness amenities
12	Access to skills training/coaching	Access to skills training/coaching	Access to skills training/coaching

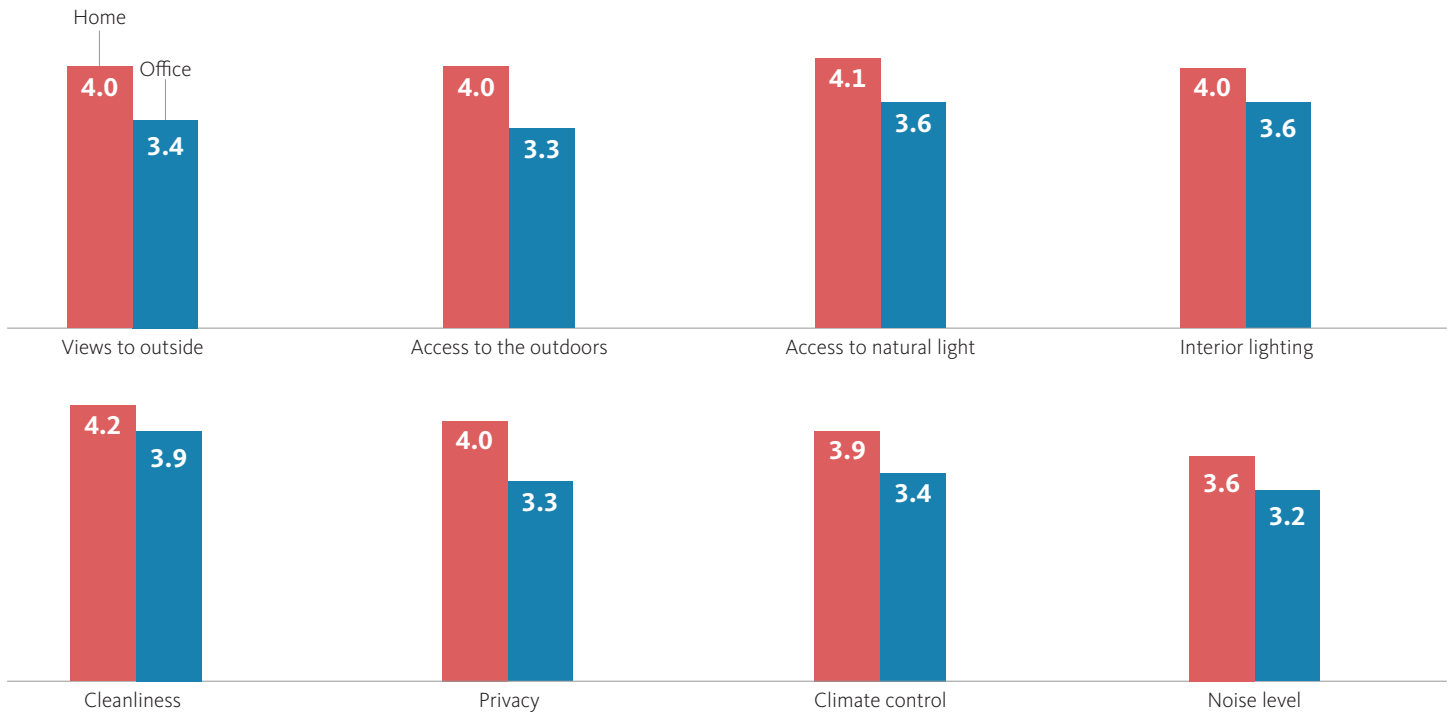
Now that most office workers in France have had the experience of working from home, they bring new expectations back to the workplace.

Working from home during the pandemic gave professionals in France the opportunity to experience an alternative work environment. Mostly, workers are satisfied with their experience of working from home. Their home environments also rate higher than offices among many physical elements related to health and wellbeing such as views to the outside, access to natural light, noise, cleanliness, and privacy.

While at home, workers don't compete for space with other employees. But at the office, only half of workers say they are able to find privacy when they need it, and 57% say they are able to reserve private rooms when they need one. Offices must strategise on how to offer workers private spaces when they need them.

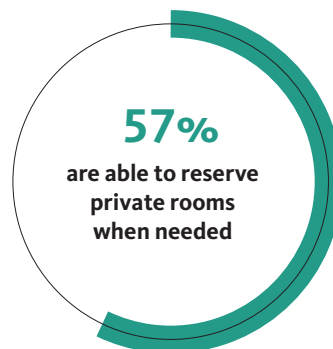
Workers in France see their homes more positively than their workplace on wellbeing and autonomy-related variables.

Respondents' rating of each item on a 5-point scale, home environments compared to work environments.



Ratings among respondents who have recent experience working from both home and the office (n=1,509).

For those currently in the office, finding spaces for privacy is a key challenge.



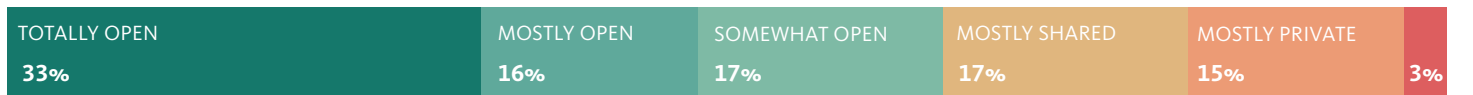
French office workers are open to a wide variety of workplace types, though many would like to move away from totally open environments.

When compared to other global regions, France uniquely has no consensus on a particular type of work environment. Most would prefer a degree of openness ranging from mostly private to mostly open. Totally open environments score the lowest on most physical workplace attributes, particularly with regards to privacy, noise level, and climate control. However, only 29% would prefer a mostly or totally private work environment.

Three-quarters of professionals in France say they would prefer to use a desk assigned only to them. Importantly, 57% would be willing to trade flexibility for the benefit of having their own desk. As building owners and employers reassess worker needs, less desk-sharing and scheduling will have direct space implications.

Workers in France are asking for a minor shift towards more private work environments.

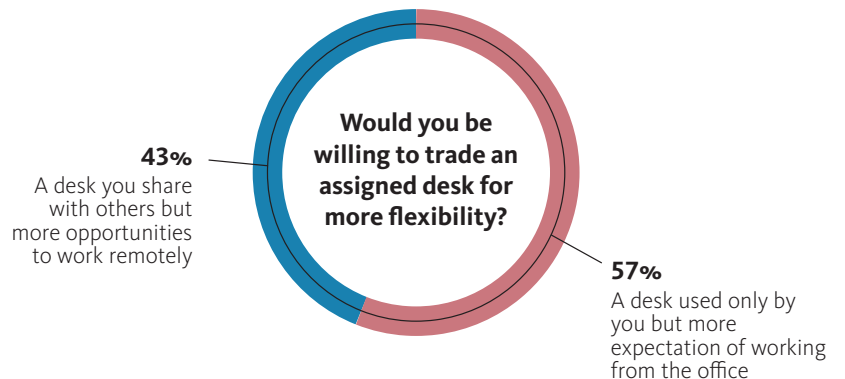
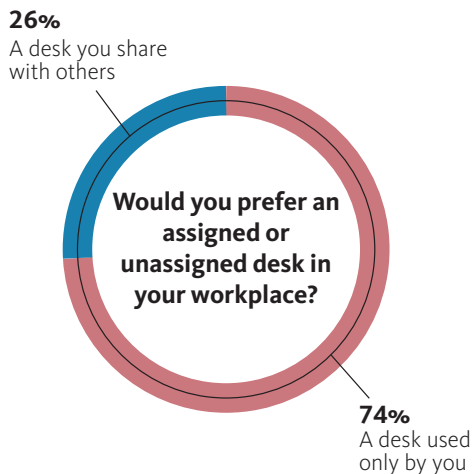
CURRENT ENVIRONMENT



IDEAL ENVIRONMENT



Most professionals would prefer an assigned desk in the office, even if it meant less flexibility to work remotely.



Workers prioritize pragmatic amenities and services that are used most frequently.

Pragmatic amenities may be the best complement to a great workplace. Workers in France indicate that the most important offerings are what they use most frequently: parking, outdoor space, and places to eat. Notably, workers in the city of Paris are not nearly as likely to drive to work, so on-site parking is less of a priority.

Providing spaces to host meetings on-site may be crucial for building owners and employers. 57% of respondents say that they would rather host a client or customer meeting either at their workplace or in a shared space operated by their building. Importantly, only 15% of senior-level leaders say they would prefer to host a client meeting virtually.

Dining, wellbeing, and parking are the most highly prioritized amenities—with parking rising to the top for workers outside Paris.

Ranking by respondents for each amenity designated as one of the most important for their workplace or office building.

For those who work in the city of Paris, parking is less of a priority. These respondents are 2x more likely to commute to work via public transportation.

Rank	Work in city of Paris	Work in Paris suburb	Work elsewhere in France
1	Coffee/tea service	Parking	Parking
2	Sit-down eating/dining	Outdoor space	Sit-down eating/dining
3	Parking	Coffee/tea service	Outdoor space
4	Outdoor space	Sit-down eating/dining	Coffee/tea service
5	To-go/carry-out food service	To-go/carry-out food service	Shower/Changing/Locker room
6	Gym/Exercise room	Gym/Exercise room	To-go/carry-out food service
7	Shower/Changing/Locker room	Shower/Changing/Locker room	Gym/Exercise room
8	Technology help desk	Medical/Health services	Preventative care services
9	Preventative care services	Preventative care services	Childcare services
10	Medical/Health services	Childcare services	Medical/Health services

Despite the experience of COVID-19, most workers in France would prefer to host customer/client meetings in-person.

Respondents' preference for where to host a customer or client meeting, by organisational role.

	In my workplace	In a shared space operated by building	Somewhere outside my building	I would rather host virtually
Senior leadership	24%	23%	38%	15%
Director/Management	33%	30%	14%	23%
Professional/Technical	42%	15%	13%	30%
Administrative	44%	10%	9%	37%

Senior leaders prefer hosting meetings in-person, and also most open to those meetings happening away from their company's workspace.

Professional, technical, and administrative staff prefer to either host meetings in the workplace, or virtually.

The office is here to stay—but employers should focus on the added benefit of flexibility.

Most workers want to spend the majority of their time at the office. While most workers have returned to the office in some capacity, few have kept the added benefit of working from home. Workers in France are not asking to

revolutionise the nature of work, they are simply asking to keep working from home as an option—whether to foster a better work/life balance, offer an alternative environment to do focus work, or lessen the burden of commuting.

52%

of workers would ideally work 1 or 2 days from home during their typical workweek.

Environments must support not only collaboration and socialising, but also the ability to host client gatherings.

Office environments are the support structure for our work. That means they have to support the diverse functions of our day-to-day life, from individual work to collaborating with others. Offices are the medium that brings coworkers together.

Most workers believe that it is easier to get things done when everyone's together. But many also want their offices to be a place to host client meetings and events. Most workers—including senior leaders—would prefer to host events at their workplace or building location.

57%

of workers would prefer to host a client event at their workplace or in a shared office space.

Workers rate their homes better on privacy and wellbeing measures—they'll bring these expectations back to the office.

Currently, home environments are better at supporting health and wellbeing. Home environments not only have better access to the outdoors and natural light, but also provide the privacy that workers need for either focus work or personal space. As workers

return to the office in greater numbers, employers may look to ways they can improve their office environments to achieve the level of privacy, autonomy, and wellbeing that workers have in their home environments.

55%

of workers are able to find privacy when they need it.