

A modern, bright office interior with a woman walking and two men sitting on a sofa. The space is open-plan with a high ceiling, exposed ductwork, and warm lighting. A woman in a grey blazer and black skirt is walking towards the camera. In the foreground, two men are sitting on a brown sofa, engaged in conversation. The background features a dining area with wooden tables and chairs, a large indoor plant wall, and a glass-walled office area. The overall atmosphere is professional and collaborative.

# WHAT WORKERS WANT

Findings from Gensler's  
2023 Global Workplace Survey

Hi, I'm  
**Naomi Sakamoto**

*Senior Associate – Studio Director  
EU Region Workplace Technology Practice Lead*

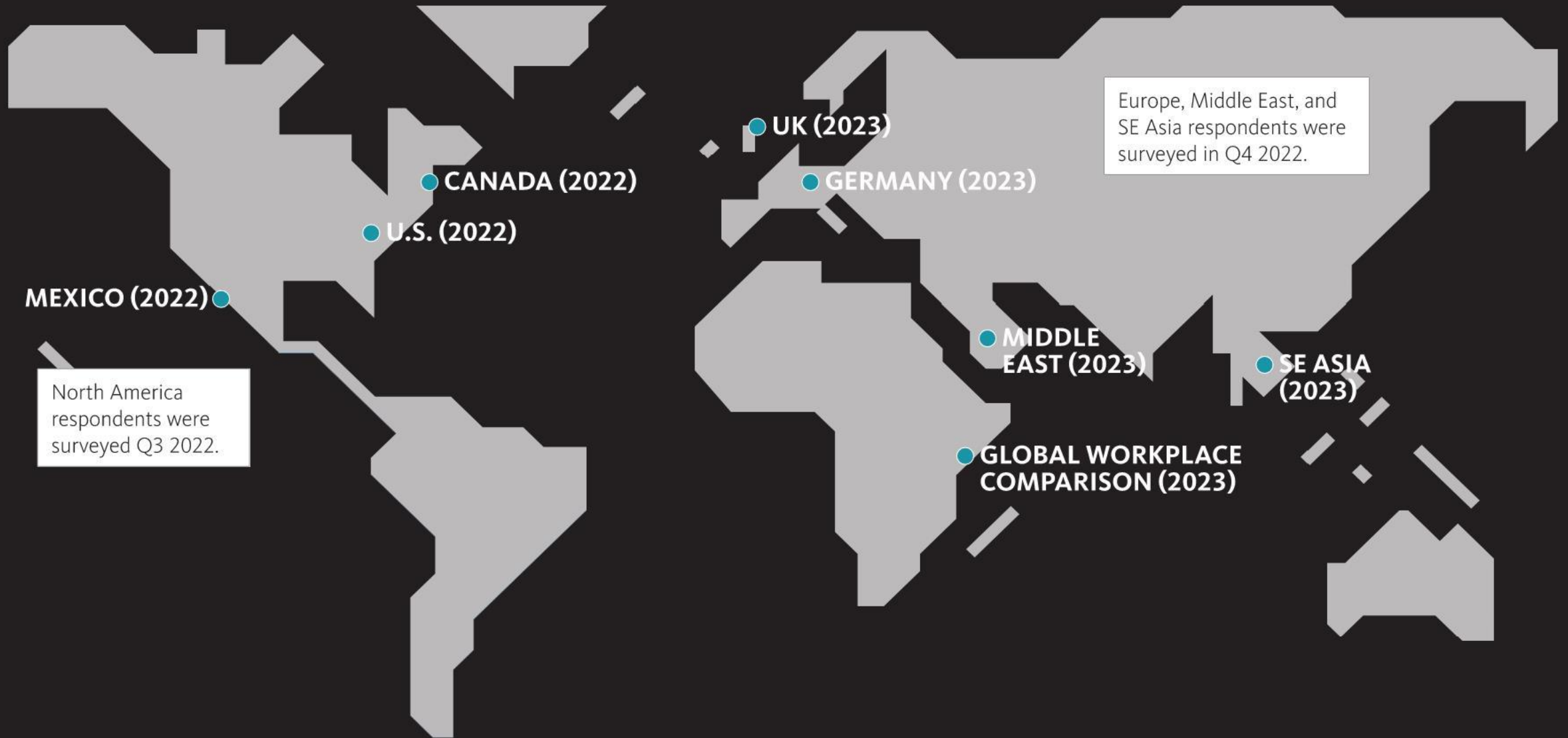
**Gensler London**



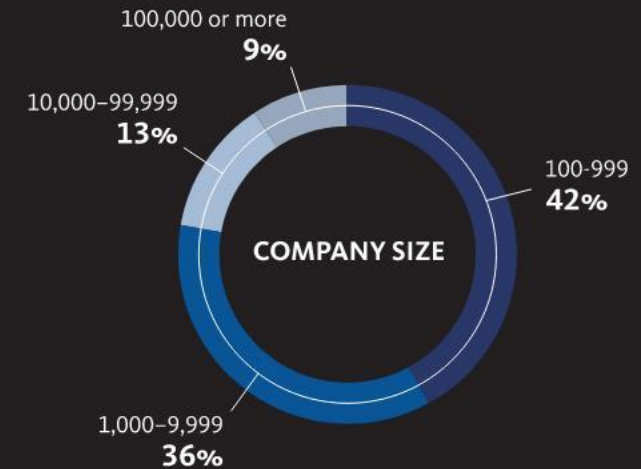
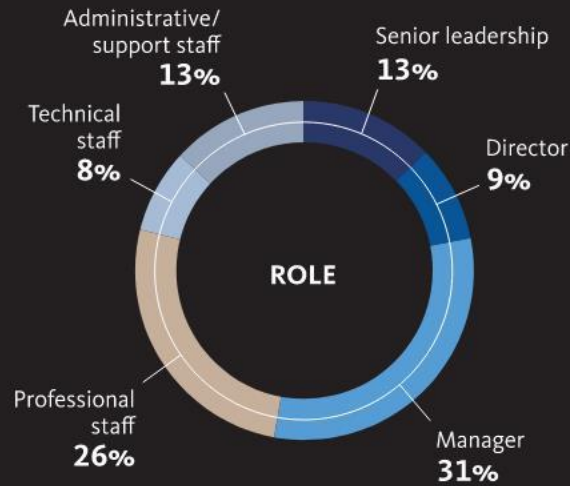
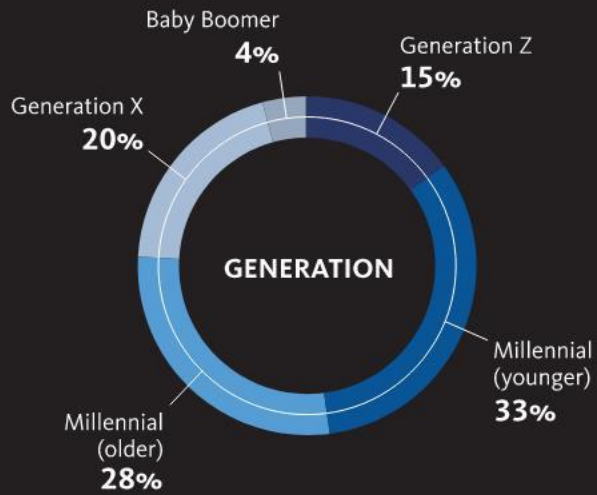
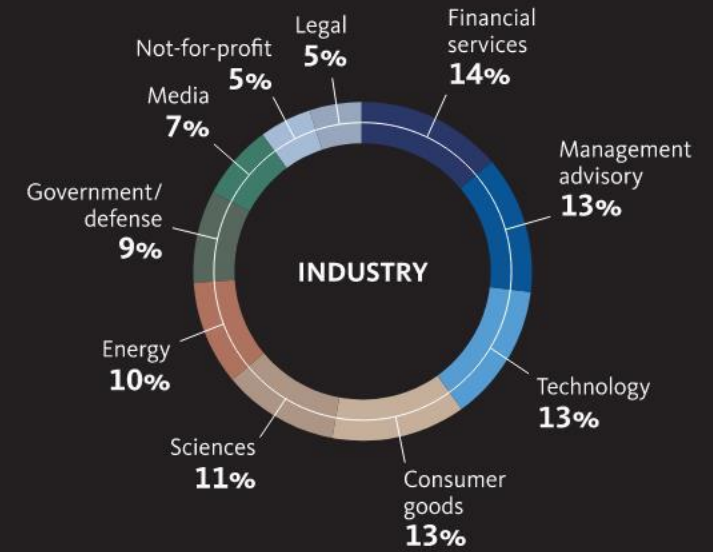
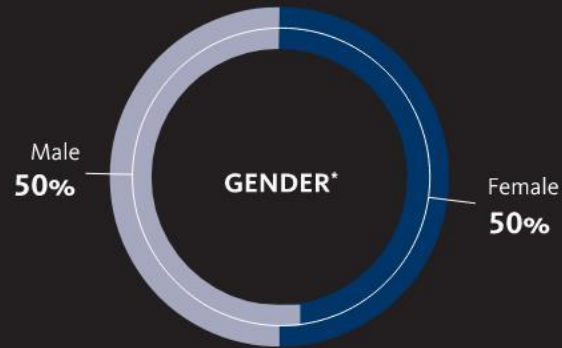
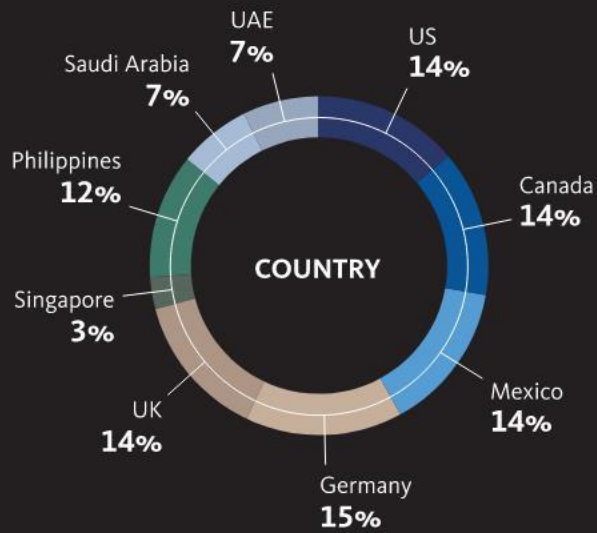
# GLOBAL WORKPLACE SURVEY COMPARISON 2023



# THIS RESEARCH IS PART OF A GLOBAL STUDY OF 14,000+ OFFICE WORKERS



# RESPONDENTS REPRESENT A BROAD CROSS SECTION OF DEMOGRAPHICS



\*Other disclosed identities captured including transgender (0.1%), gender non-confirming/non-binary (0.1%), and not disclosed gender identity (0.1%) did not exceed one percent.

# 1 DATA

How, where, why, and what?

## WHAT WE LEARNED

**How** do people work?

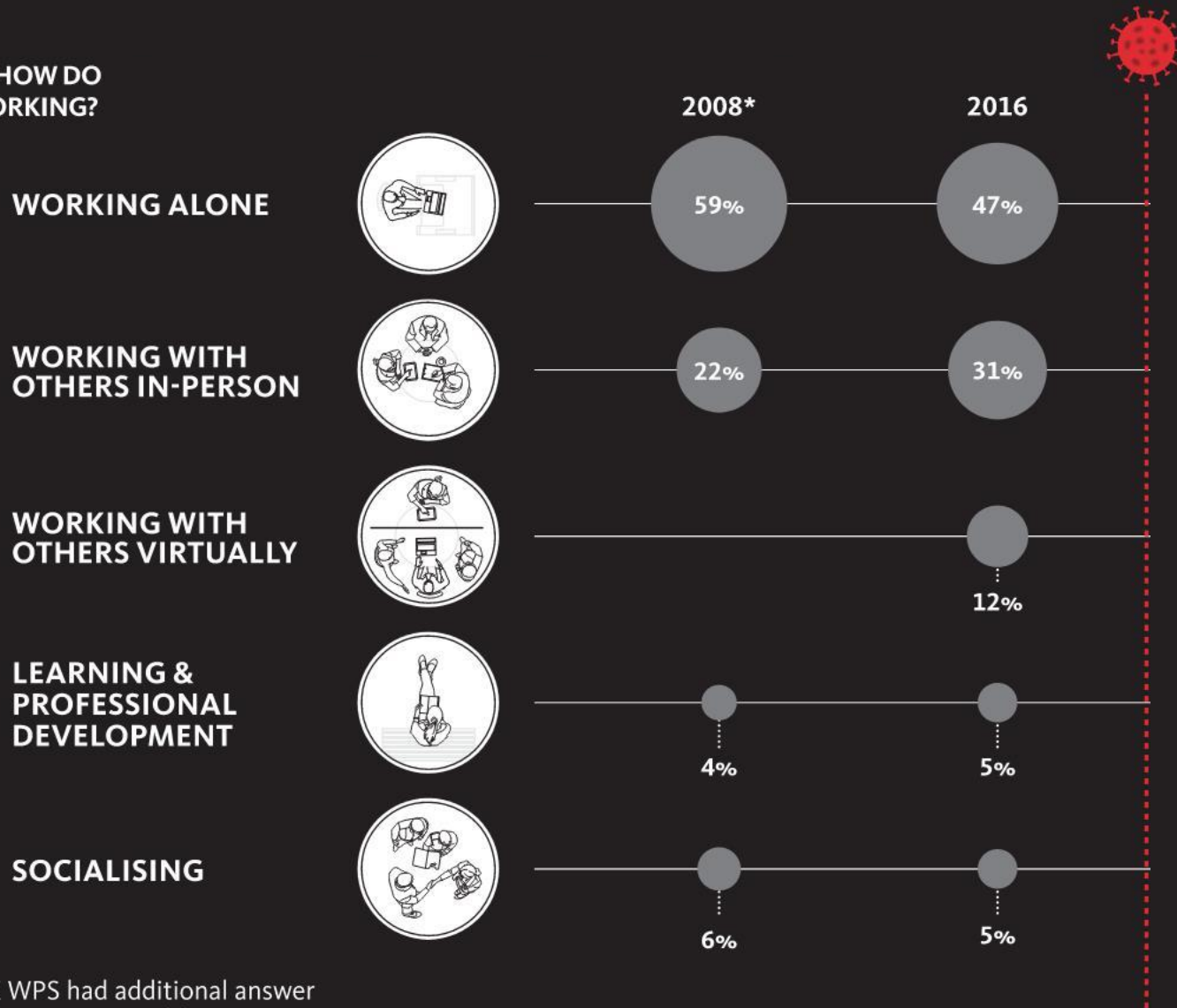
**Where** do people work?

...and when they choose the office, **why**?

**What** do workers want?

# HOW DO PEOPLE WORK?

DURING A TYPICAL WEEK, HOW DO YOU SPEND YOUR TIME WORKING?

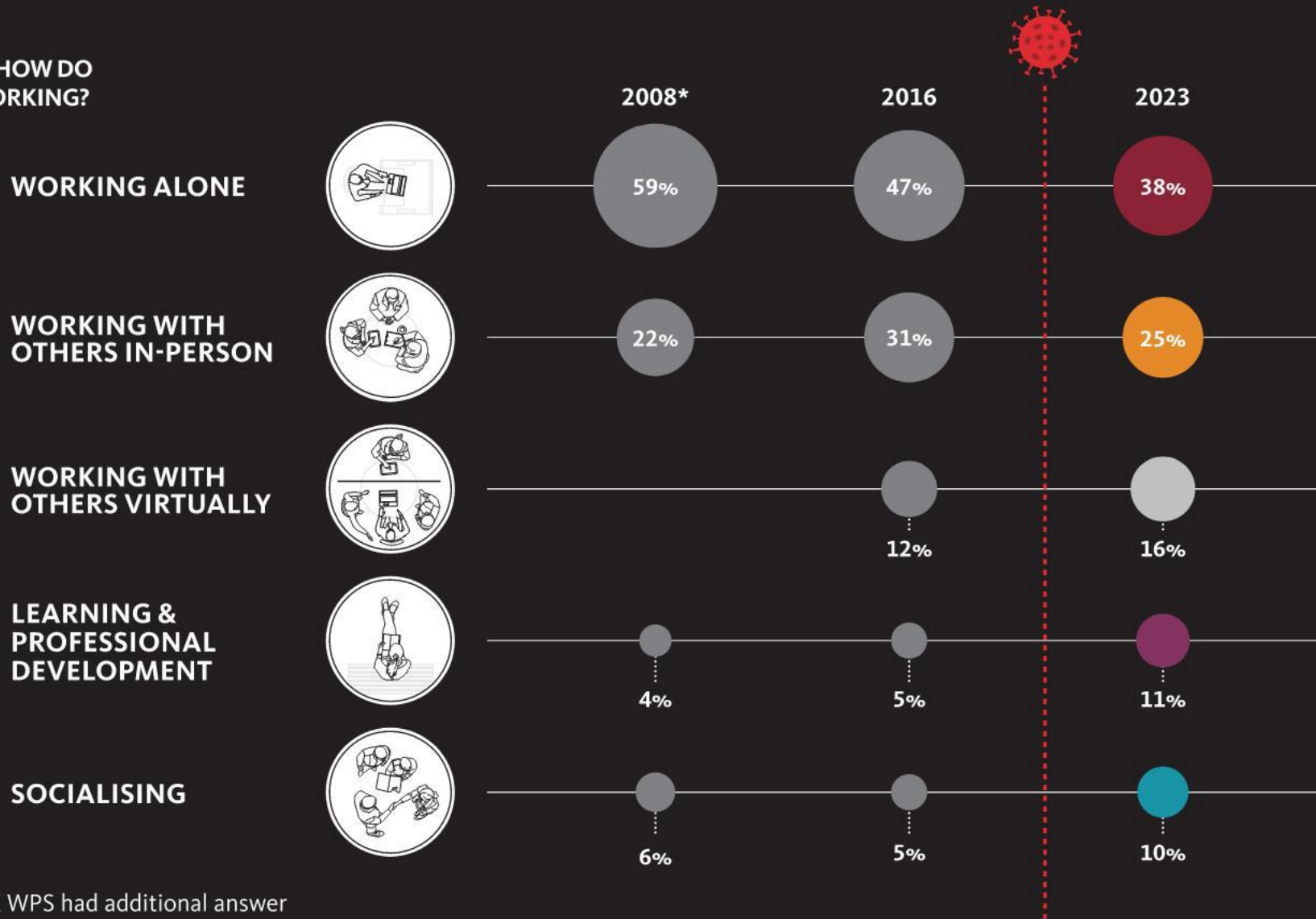


\*This question in the 2008 UK WPS had additional answer options, which account for the unaccounted for 9%.



# HOW DO PEOPLE WORK?

DURING A TYPICAL WEEK, HOW DO YOU SPEND YOUR TIME WORKING?

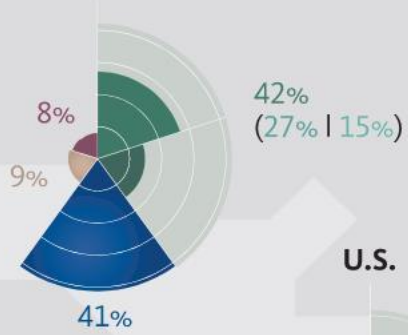


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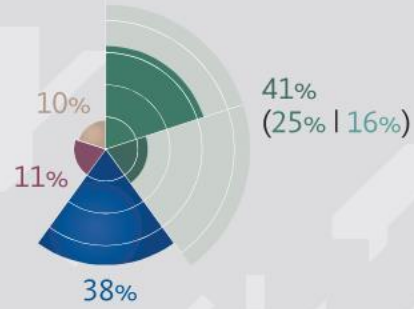
# HOW PEOPLE WORK IS FAIRLY SIMILAR GLOBALLY

DURING A TYPICAL WEEK, HOW DO YOU SPEND YOUR TIME WORKING?

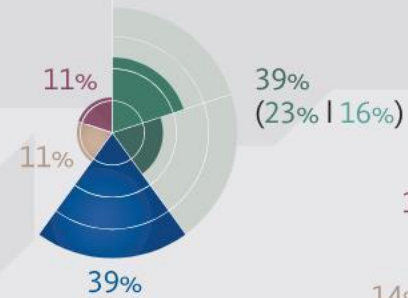
CANADA



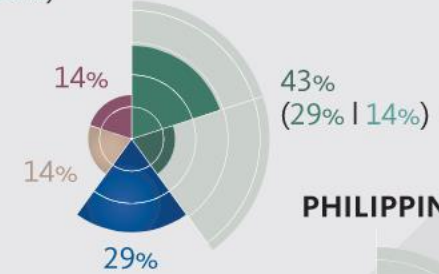
UK



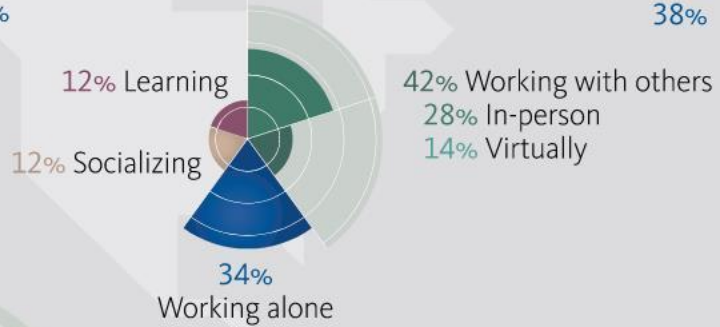
GERMANY



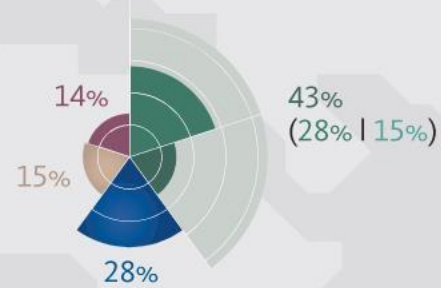
UAE



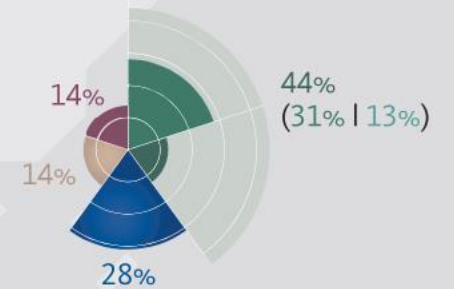
U.S.



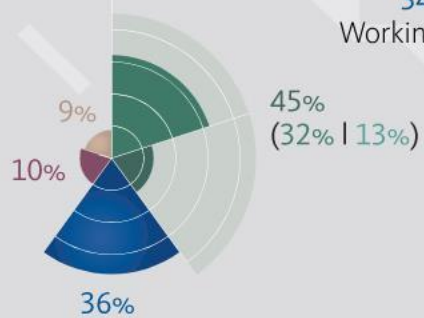
SAUDI ARABIA



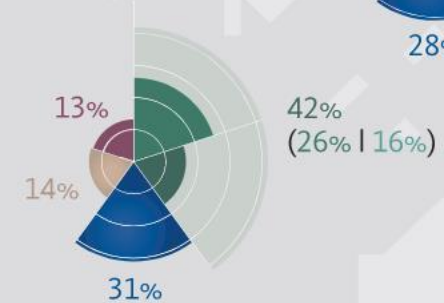
PHILIPPINES



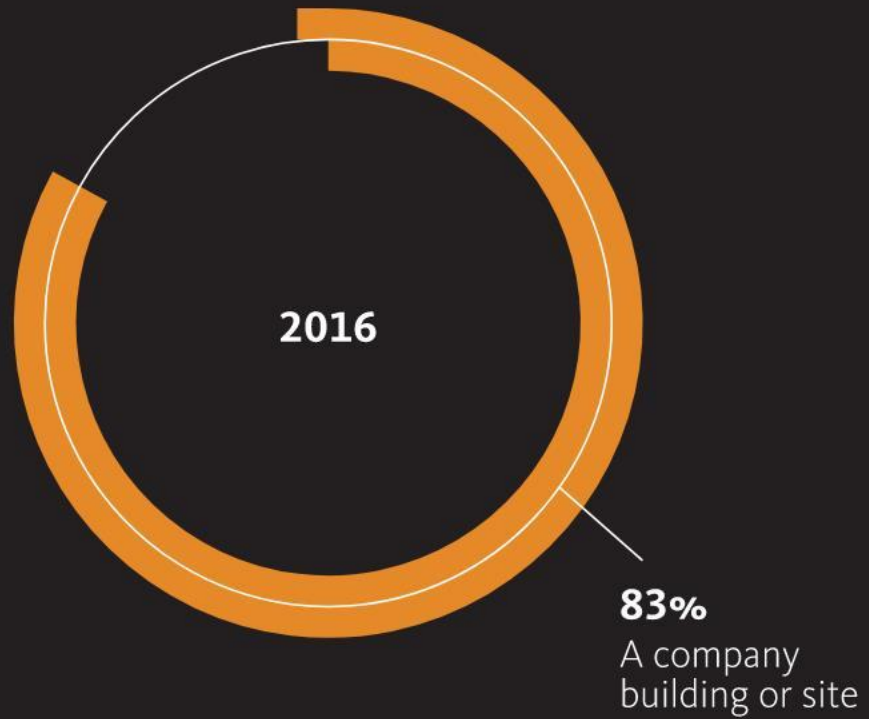
MEXICO



SINGAPORE

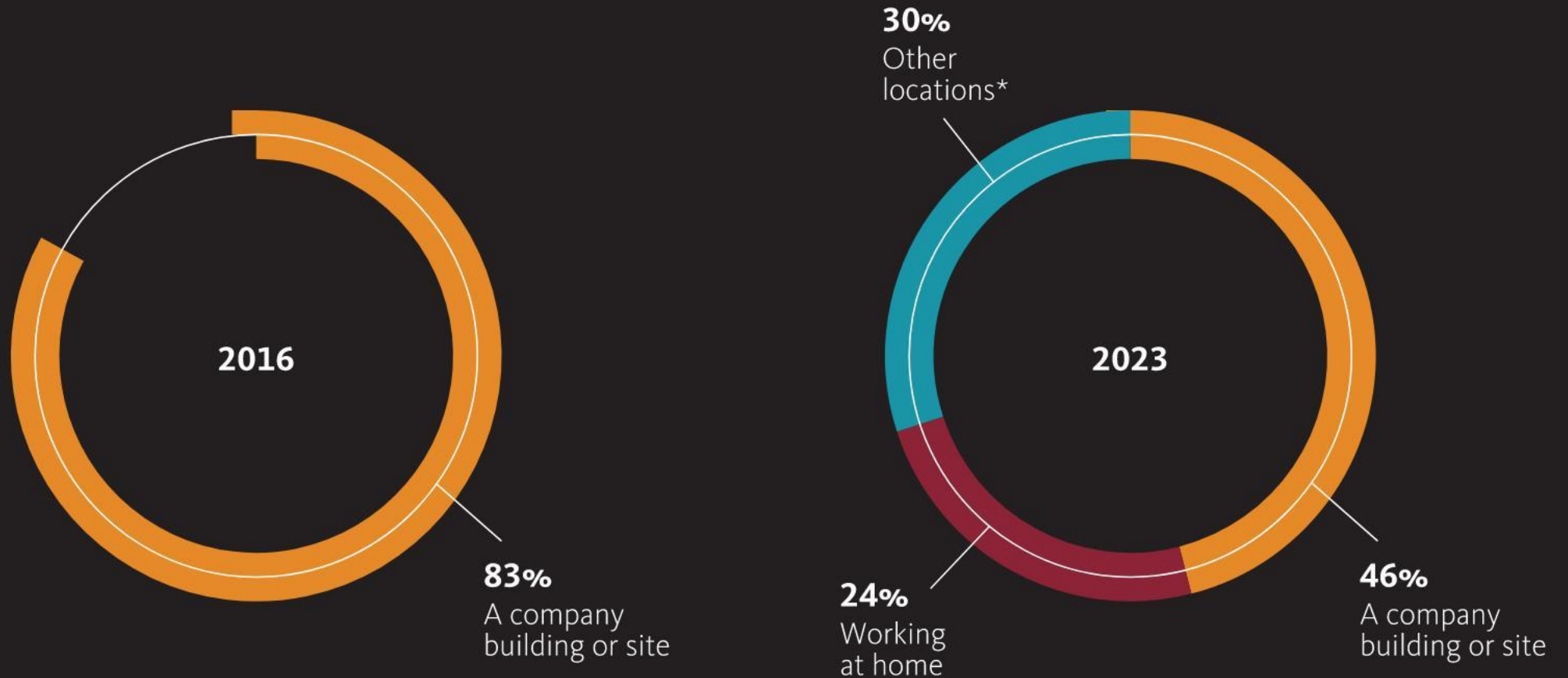


# WHERE DO PEOPLE WORK?



\*Other locations include alternate office locations, travelling, working at client/customer sites, and coworking. Third places include coffee shops, libraries, parks, etc.

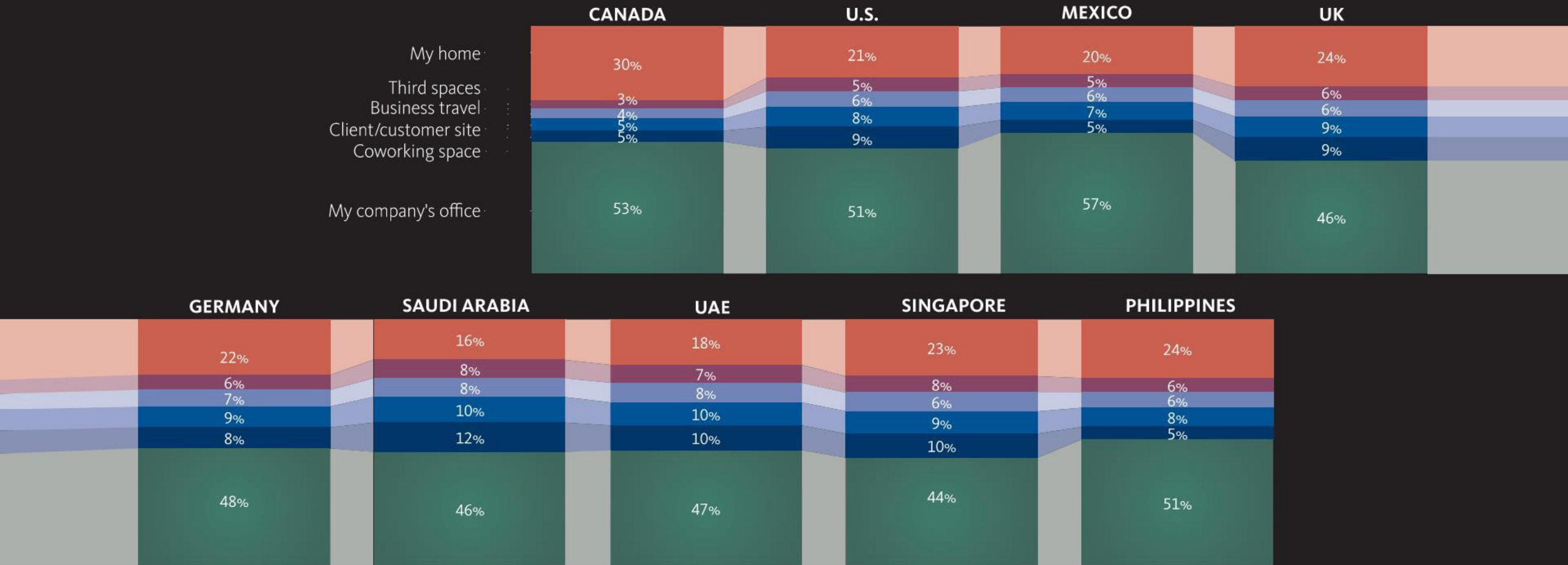
# WHERE DO PEOPLE WORK?



\*Other locations include alternate office locations, travelling, working at client/customer sites, and coworking. Third places include coffee shops, libraries, parks, etc.

# WHERE DO PEOPLE WORK?

DURING A TYPICAL WORK WEEK, HOW MUCH OF YOUR TIME DO YOU SPEND WORKING IN EACH OF THESE LOCATIONS?



# WHY DO PEOPLE CHOOSE THE OFFICE?

**DURING THE PANDEMIC, “WORKING IN PERSON WITH MY TEAM” WAS THE TOP RANKED REASON TO COME INTO THE OFFICE**

Rank	INDIA	CHINA	U.S.	UK	FRANCE	AUSTRALIA
1	Working in-person with my team/colleagues	Working in-person with my team/colleagues	Working in-person with my team/colleagues	Working in-person with my team/colleagues	Working in-person with my team/colleagues	Working in-person with my team/colleagues
2	To focus on my work	To focus on my work	Impromptu, face-to-face connections	Socializing with colleagues	Socializing with colleagues	Socializing with colleagues
3	Socializing with colleagues	To be part of the community	Socializing with colleagues	To focus on my work	To focus on my work	Impromptu, face-to-face connections
4	Access to specialized technology and support	Access to specialized technology and support	To focus on my work	Impromptu, face-to-face connections	Access to specialized technology and support	To focus on my work
5	Access to daily technology and support	Access to skills training/coaching	Brainstorming/ideating with colleagues	Brainstorming/ideating with colleagues	Brainstorming/ideating with colleagues	Brainstorming/ideating with colleagues
6	Access to skills training/coaching	Impromptu, face-to-face connections	Access to daily technology and support	To be part of the community	Scheduled, in-person meetings with clients	Learning/teaching/mentorship
7	Learning/teaching/mentorship	Socializing with colleagues	Scheduled, in-person meetings with clients	Scheduled, in-person meetings with clients	To be part of the community	To be part of the community
8	Scheduled, in-person meetings with clients	Access to specialized spaces, materials or resources	To be part of the community	Access to daily technology and support	Access to daily technology and support	Access to daily technology and support

Source: Gensler Global Workplace Survey Comparison 2020/2021

# WHY DO PEOPLE CHOOSE THE OFFICE?

NOW, "TO FOCUS ON MY WORK" RISES TO THE TOP

Rank	CANADA	U.S.	MEXICO	UK	GERMANY	UAE	SINGAPORE	PHILIPPINES
1	To focus on my work	To focus on my work	Scheduled, in-person meetings with colleagues	To sit with team	To sit with team	To focus on my work	To focus on my work	To focus on my work
2	Socializing with colleagues	Access to technology	Professional development / coaching	To focus on my work	Scheduled, in-person meetings with colleagues	Access to technology	Scheduled, in-person meetings with colleagues	Professional development / coaching
3	Access to technology	Scheduled, in-person meetings with colleagues	Scheduled, in-person meetings with clients	Scheduled, in-person meetings with colleagues	Access to senior leaders / decision-makers	Professional development / coaching	Access to technology	Socializing with colleagues
4	Scheduled, in-person meetings with colleagues	Access to specialized spaces, materials or resources	Access to specialized spaces, materials or resources	Socializing with colleagues	Access to specialized spaces, materials or resources	Scheduled, in-person meetings with clients	Socializing with colleagues	Access to technology
5	To sit with team	To sit with team	To focus on my work	Access to technology	To focus on my work	To sit with team	Access to specialized spaces, materials or resources	Scheduled, in-person meetings with colleagues
6	Access to specialized spaces, materials or resources	Professional development / coaching	Access to technology	Access to senior leaders / decision-makers	Socializing with colleagues	Socializing with colleagues	Scheduled, in-person meetings with clients	To be visible for opportunities that arise
7	Scheduled, in-person meetings with clients	Scheduled, in-person meetings with clients	Access to senior leaders / decision-makers	Scheduled, in-person meetings with clients	Access to technology	Scheduled, in-person meetings with colleagues	To sit with team	Access to specialized spaces, materials or resources
8	Professional development / coaching	Socializing with colleagues	Socializing with colleagues	Professional development / coaching	To be part of the community	To be visible for opportunities that arise	Professional development / coaching	Access to senior leaders / decision-makers

# “TO FOCUS ON MY WORK” IS PARTICULARLY IMPORTANT REASON TO COME TO THE OFFICE FOR YOUNGER GENERATIONS

FOR WHICH OF THE FOLLOWING REASONS IS IT MOST IMPORTANT TO COME TO THE WORKPLACE?

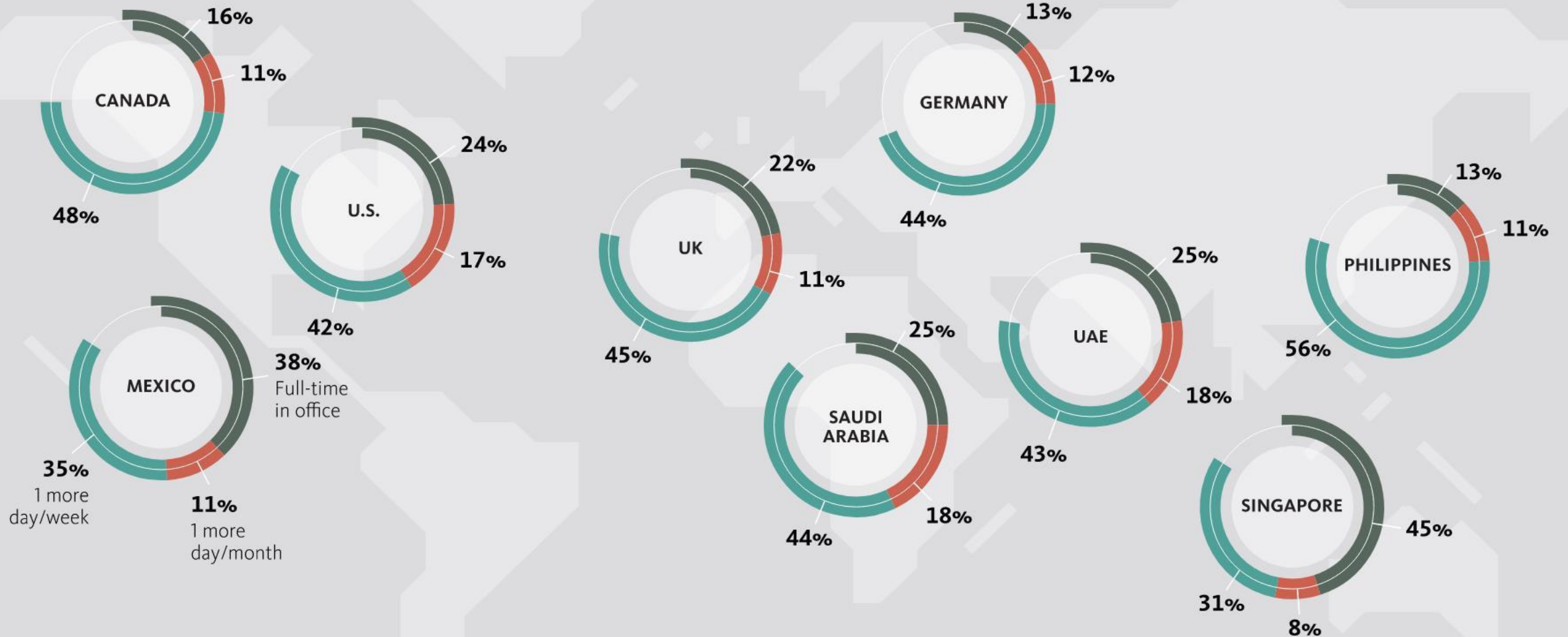
Rank	Gen Z	Millennial (Younger)	Millennial (Older)	Gen X & Baby Boomer
1	To focus on my work	To focus on my work	To focus on my work	To sit with my team
2	Socialising with colleagues	To sit with my team	To sit with my team	Scheduled, in-person meeting with team
3	Scheduled, in-person meeting with team	Scheduled, in-person meeting with team	Scheduled, in-person meeting with team	Socialising with colleagues
4	To be part of the community	Socialising with colleagues	Socialising with colleagues	Access to technology
5	Access to technology	Access to senior leaders	Access to technology	Scheduled, in person meeting with clients
6	To sit with my team	Professional development/coaching	Access to senior leaders	To focus on my work
7	Access to senior leaders	Scheduled, in person meeting with clients	Scheduled, in person meeting with clients	Access specific spaces, materials, or resources
8	Professional development/coaching	Access to technology	Professional development/coaching	Access to senior leaders
9	Scheduled, in person meeting with clients	To be part of the community	To be part of the community	Professional development/coaching
10	Access specific spaces, materials, or resources	Access specific spaces, materials, or resources	Access specific spaces, materials, or resources	To be visible for opportunities



# WHAT DO WORKERS WANT?

A

IF YOUR COMPANY PROVIDED YOUR IDEAL WORK EXPERIENCE MIX, WOULD YOU BE WILLING TO COME TO YOUR COMPANY'S OFFICE MORE OFTEN?

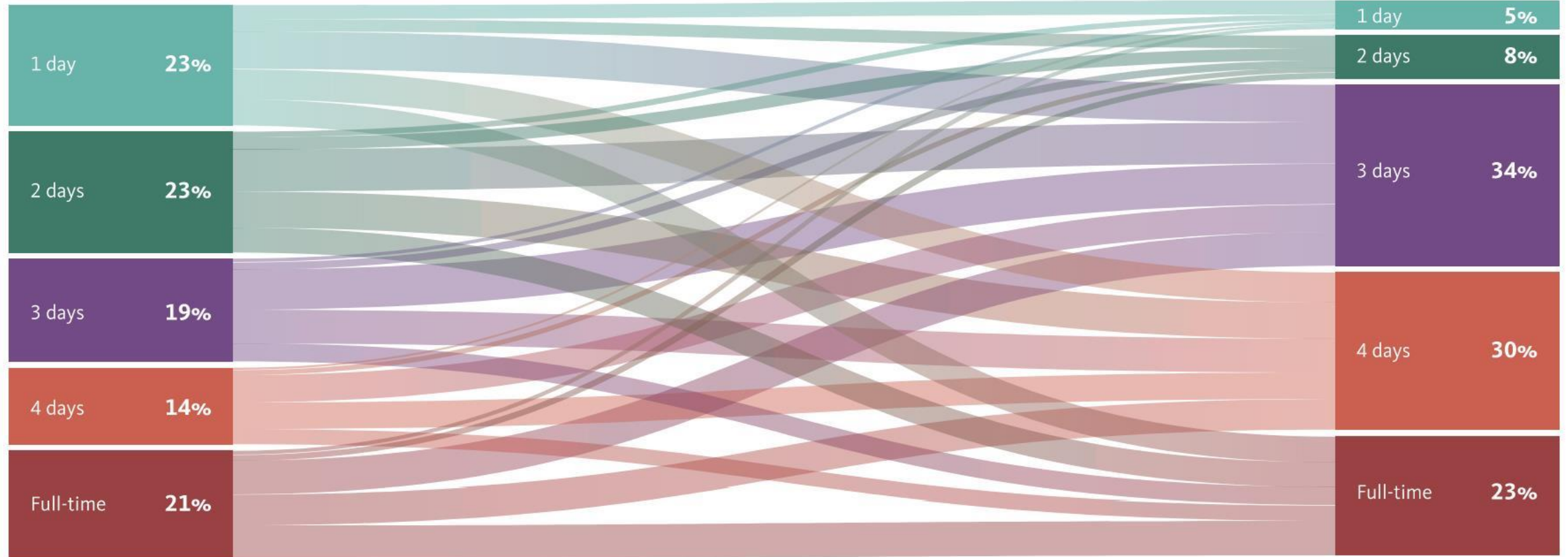


# GLOBAL WORKERS REPORT THAT THEY IDEALLY NEED TO BE IN THE OFFICE MORE OFTEN TO MAXIMIZE THEIR PRODUCTIVITY

HOW MUCH TIME DO YOU IDEALLY NEED TO SPEND AT YOUR COMPANY'S OFFICE TO MAXIMIZE YOUR INDIVIDUAL AND TEAM'S PRODUCTIVITY?

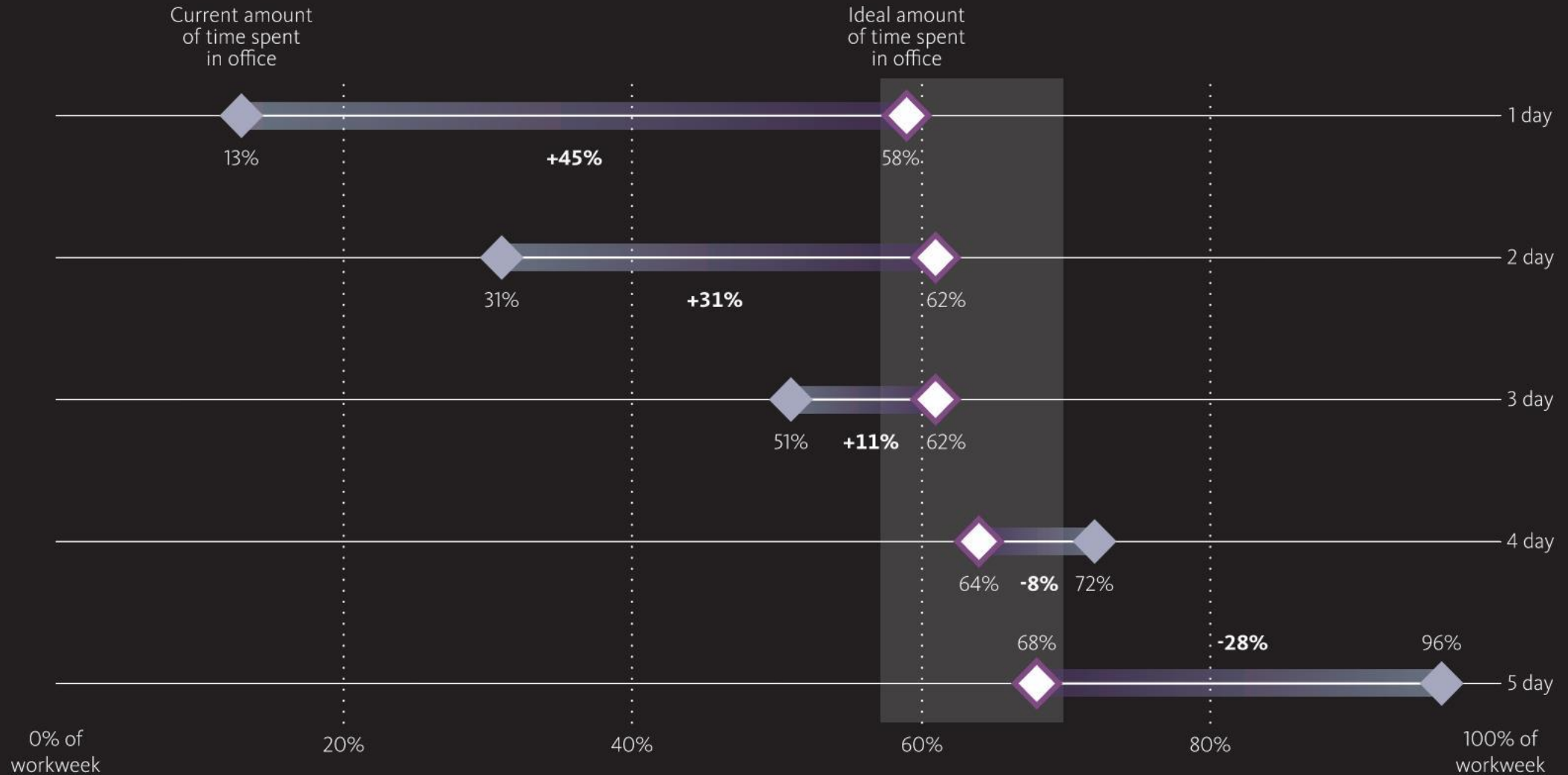
CURRENTLY WORKING AT THE OFFICE

IDEALLY WORKING AT THE OFFICE



Days in office based on percentage of time working at the office. 1 day (0-20%), 2 days (21-40%), 3 days (41-60%), 4 days (61-80%), 5 days (81-100%).

# THE SWEET-SPOT OF TIME NEEDED IN THE OFFICE FOR PRODUCTIVITY IS BETWEEN 58–68% OF A TYPICAL WORKWEEK



**2**

# **RECOMMENDATIONS**

**How can we design better places for work?**



AUTONOMY



BELONGING



COMPETENCE

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# AUTONOMY

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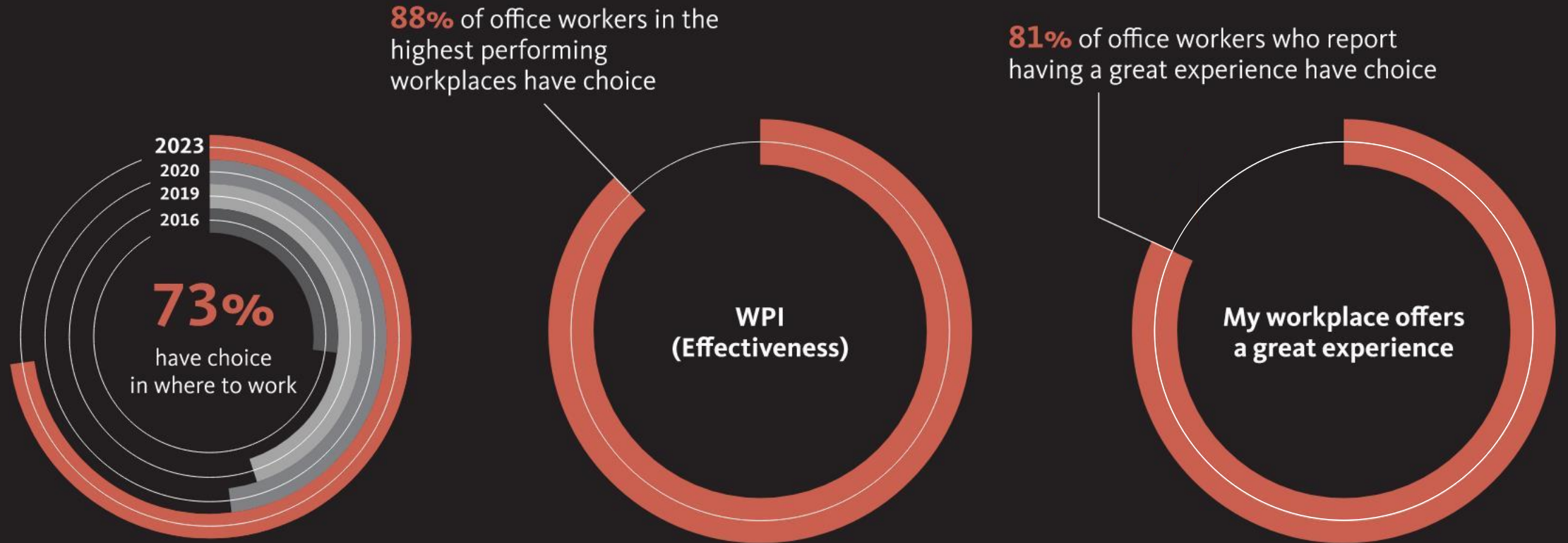
*The desire to feel control over our work  
(how, where, and when)*



Provide a variety of spaces, environments, and postures to give people a choice in where to work



# CHOICE IS A POWERFUL CONTRIBUTOR TO BOTH SPACE EFFECTIVENESS AND A GREAT WORKPLACE EXPERIENCE

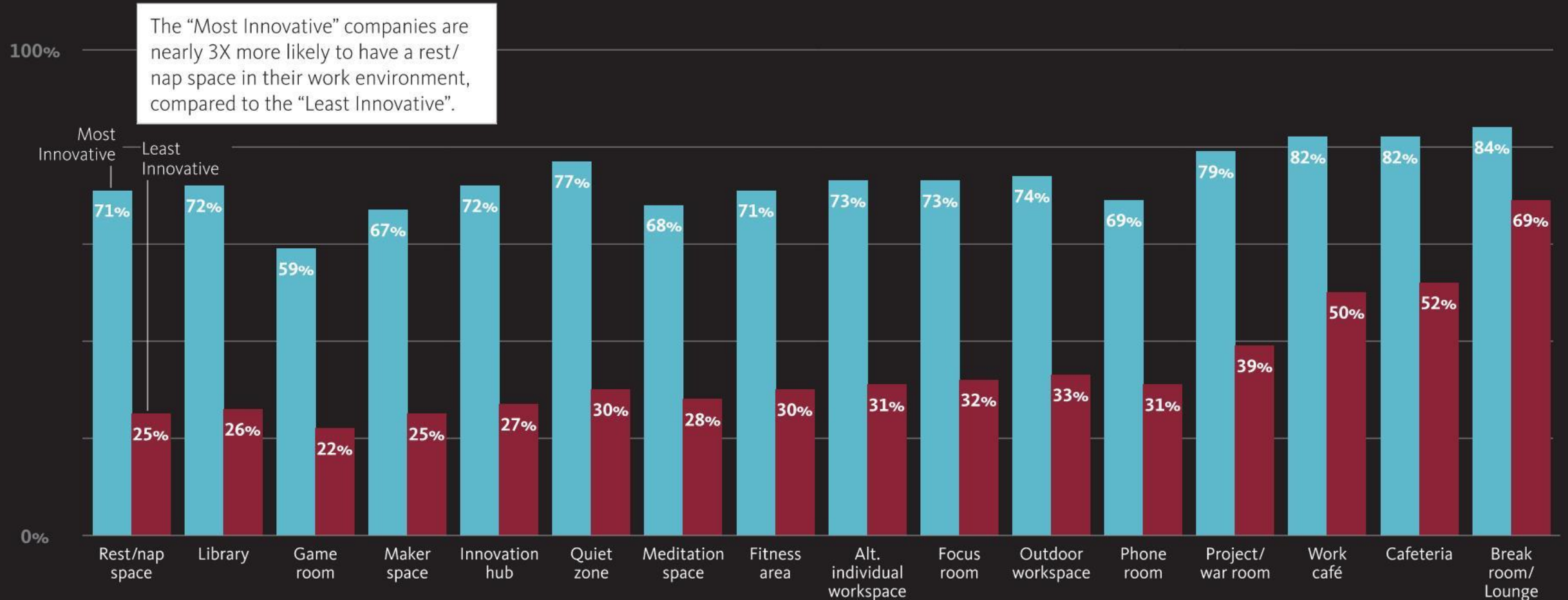


Note: "Choice" is defined as having choice in where to work within the office environment. Percentage of choice prior to 2023 is U.S. data.



# INNOVATORS HAVE A WIDE RANGE OF WORK SPACES AT THE OFFICE

## WHICH OF THE FOLLOWING DO YOU CURRENTLY HAVE?



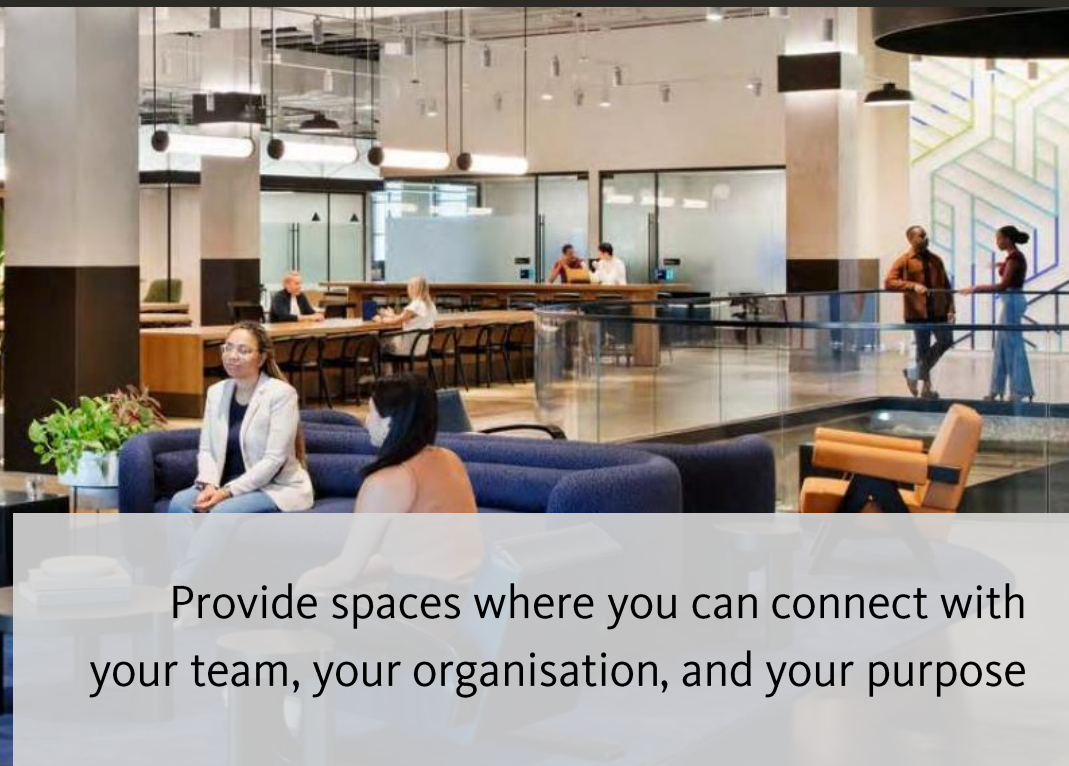


# BELONGING

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*The desire to feel connected to each other  
and to a larger purpose*

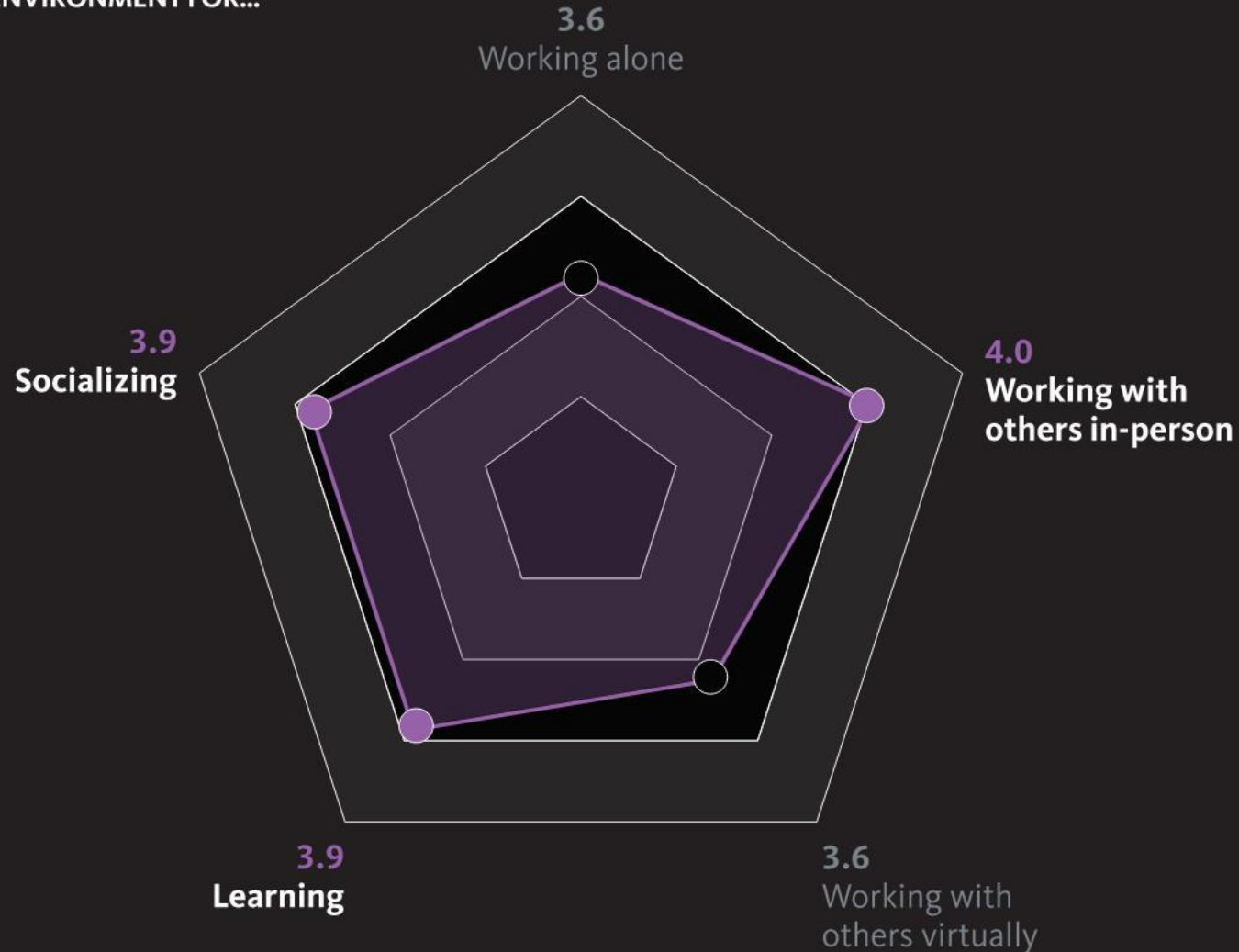




Provide spaces where you can connect with your team, your organisation, and your purpose

# THE WORKPLACE IS EFFECTIVE FOR WORKING WITH OTHERS IN-PERSON, LEARNING & SOCIALIZING

HOW EFFECTIVE IS THE OVERALL OFFICE ENVIRONMENT FOR...





# COMPETENCE

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*The desire to feel good at what we do*



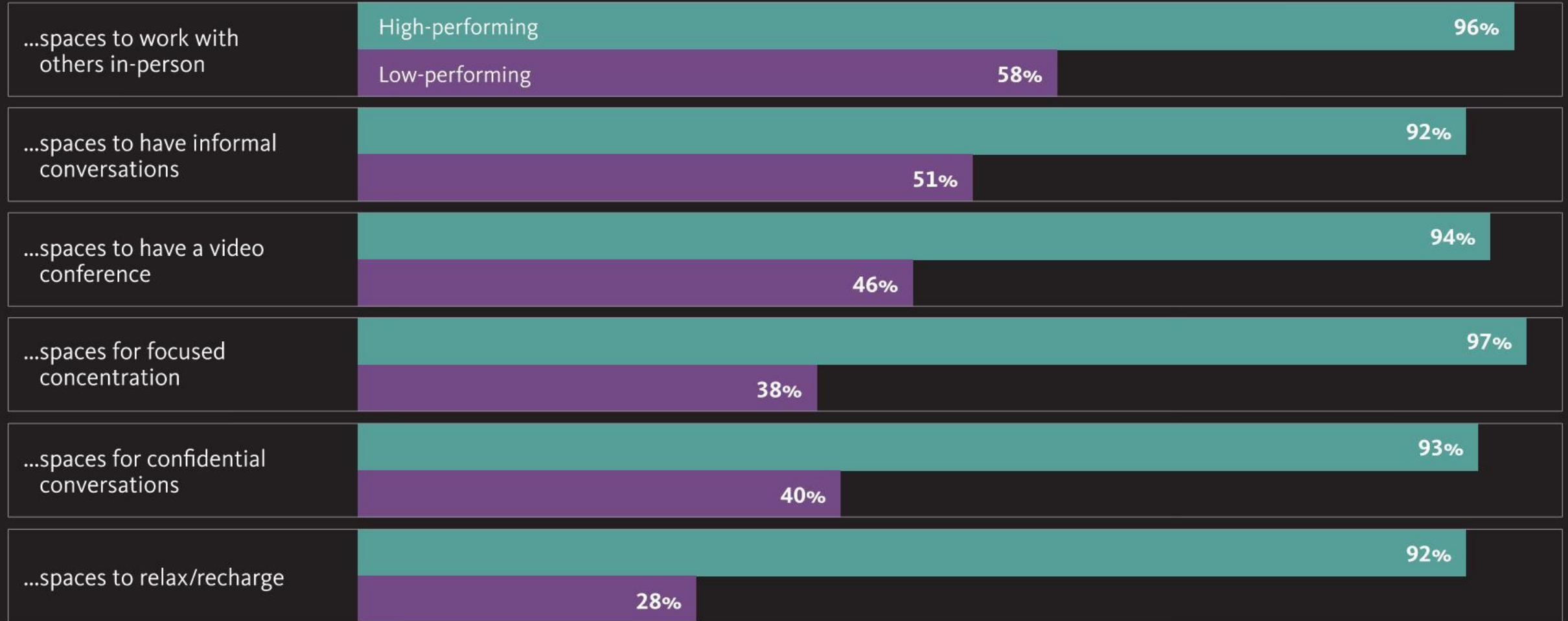


Provide spaces where you and your team can do and share work effectively



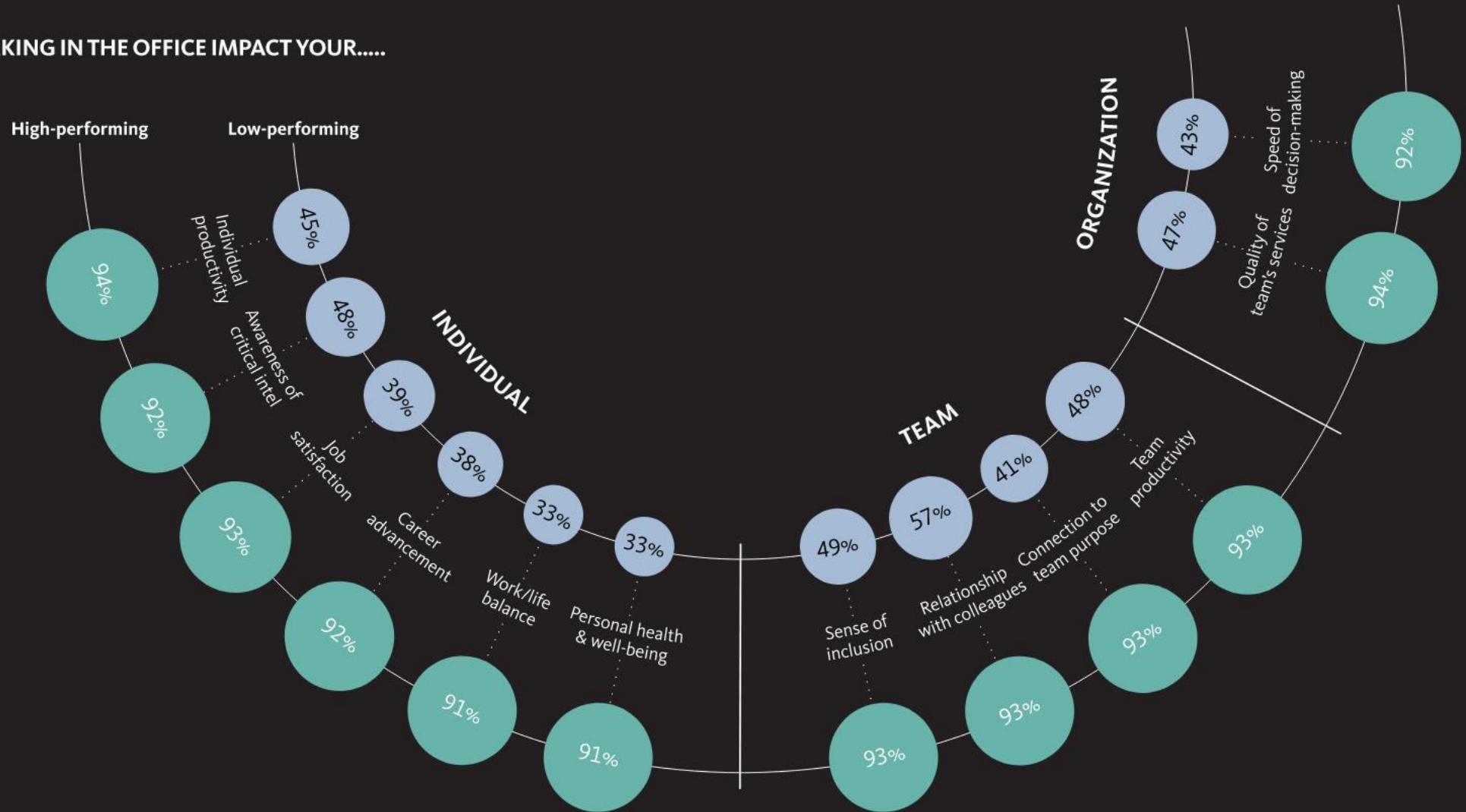
# THOSE IN HIGH-PERFORMING WORKPLACES HAVE EASIER ACCESS TO SPACES FOR CRITICAL WORK ACTIVITIES

## IN THE OFFICE ENVIRONMENT, IT'S EASY TO ACCESS...



# HIGH-PERFORMING WORKPLACES POSITIVELY IMPACT INDIVIDUAL, TEAM, AND ORGANIZATIONAL OUTCOMES

HOW DOES WORKING IN THE OFFICE IMPACT YOUR.....

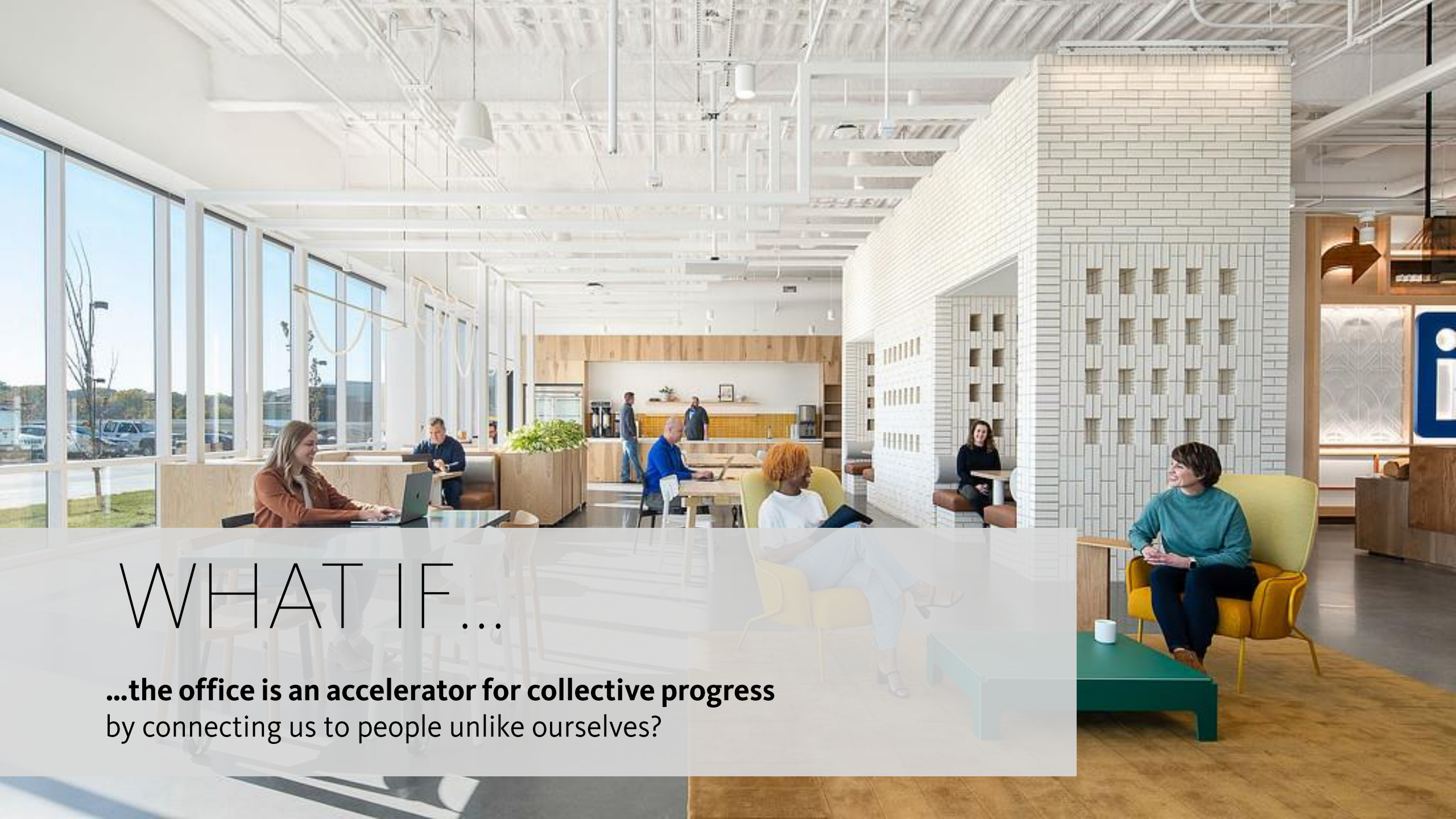




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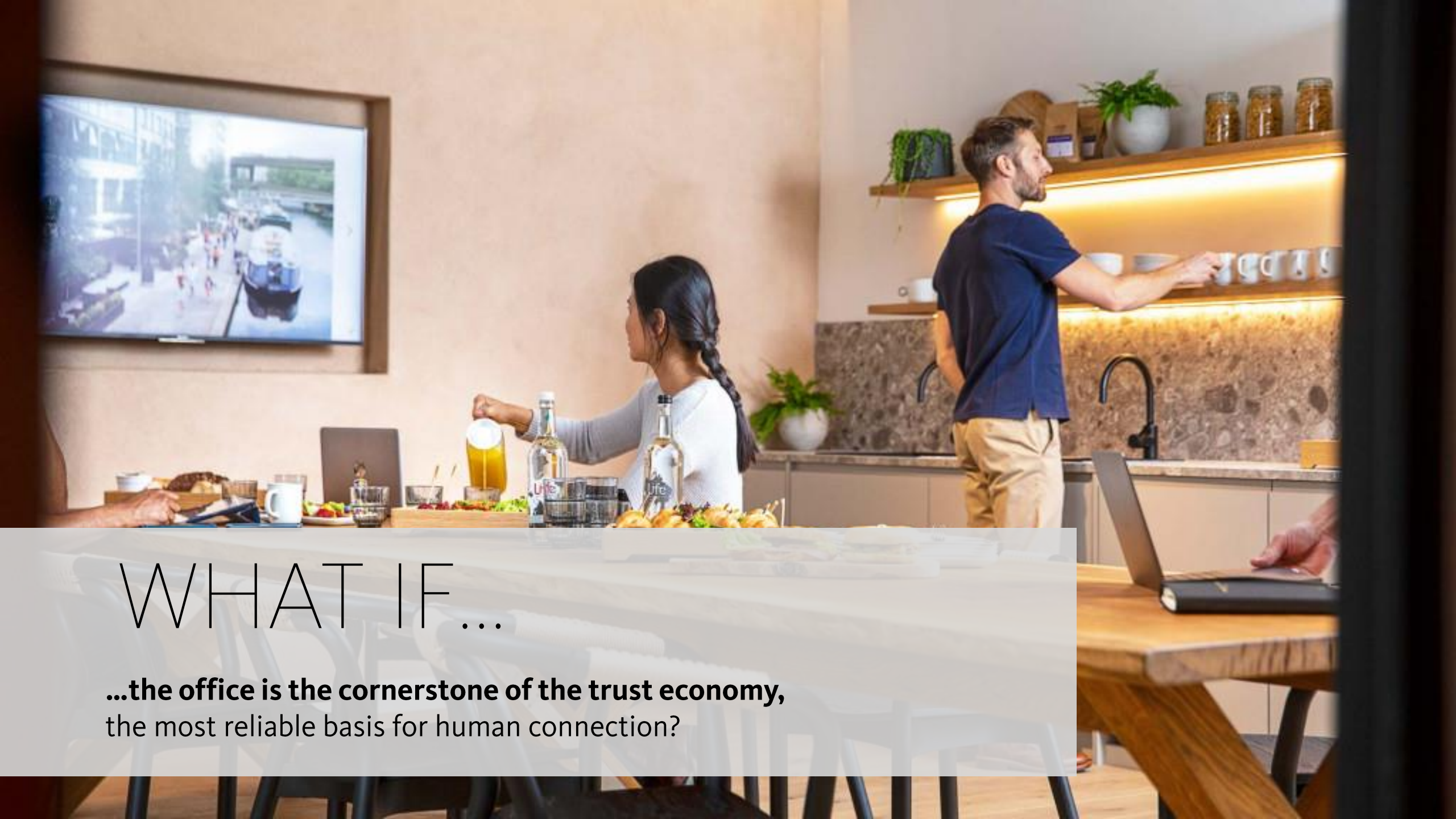
# **SPECULATIONS**

**What might be next?**



WHAT IF ...

**...the office is an accelerator for collective progress**  
by connecting us to people unlike ourselves?



WHAT IF ...

**...the office is the cornerstone of the trust economy,**  
the most reliable basis for human connection?



WHAT IF ...

**...the bits in between**  
are the most important of all?



ESPRESSO	1.35	HOT CHOCOLATE	2.45
GR. ESPRESSO	1.45	WHITE CHOCOLATE	2.45
MACCHIATO	1.35	TEA	1.70
VIA	2.45		
CAPPUCCINO	2.45		
LATTE	2.45	ORANGE JUICE	3.10
FLAT WHITE	2.45		
MOCHA	2.45		
CRAI	2.45		

THANK YOU

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