IWG U.S. Hybrid Worker Sentiment Survey
February 2023

To gauge current views and preferences of workers and managers regarding hybrid work, International Work Group commissioned a survey of 1,015 full-time hybrid workers in the U.S. in early February 2023. Respondents were asked a diverse set of questions from the biggest benefits of hybrid work and the value of hybrid work to how work friendships impact their job satisfaction.

IWG (www.iwgplc.com) is the world's leading provider of flexible workspace – with 3,500 locations in more than 120 countries and brands including Spaces and Regus. Unprecedented demand from companies of all sizes and workers looking for hybrid working solutions means IWG will add 1,000 new locations over the next year.

Key Takeaways

- **Workers Would Give Up a Portion of Their Salaries for Hybrid:** Overall, 67% of respondents would be willing to give up some amount of salary to keep their hybrid work arrangement.

- **$13,000** is the average amount respondents would give up **from their salary** to secure the flexibility of hybrid work, rather than returning to the office five days per week.

- **Nearly a quarter (24%) of those making more than $150,000** per year would give up **more than $40,000 per year.**

- **Hybrid Work is a Must-have Job Benefit:** With 45% of respondents saying that they will consider changing jobs if they are asked to return to the office full-time, 61% say they will only consider hybrid roles if they look for a new job.

- **Managers and Employees Agree about Productivity in Hybrid Work:** 65% of all managers believe their employees to be very productive in a hybrid work arrangement and 60% of employees believe their managers think they are very productive in a hybrid work environment. Close to three quarters (72%) say they feel better able to carry out their jobs since adopting hybrid work.

- **Three Work Friends is a Magic Number Contributing to Job Satisfaction:** Nearly half (46%) of hybrid workers believe that friendships play a key factor in choosing to stay at a company. The majority (63%) of hybrid workers surveyed reported that office friendships increase job satisfaction and 46% reported that close friends keep them at their jobs.

- **Social Activities and Connecting with Coworkers in Person Drive Trips to the Office:** More than half (53%) of respondents cite that social activities and seeing co-workers are the biggest drivers of time spent in the office – ahead of learning and development opportunities (43%), office amenities (40%), and impressing managers/bosses (24%).

Survey Data Points

Workers Would Exchange Reduced Salary for Hybrid Work
- Overall, 67% of respondents would be willing to give up some amount of salary to keep their hybrid work arrangement.
- Workers would give up $13,000 on average in exchange for hybrid work.
- 7% of all respondents would give up more than $40K annually to keep a hybrid work schedule vs. being fully in-office

    - 10% of all respondents would give up $30K
    - 16% of all respondents would give up $10K
- By salary range:
    - Nearly a quarter (24%) of those making $150K or more would give up more than $40K of their salary
    - 21% of those making $100-149K would give up $20K
    - 16% of those making $50 – 99K would give up $5K
- Generational differences:
    - 22% of Millennials & Gen Z would be willing to give up 31-40% of their salary (0% of Boomers and Gen X would say the same)
    - 25% of Boomers and 21% of Gen X would give up 1-10% of their salary

Work Friendships & Job Satisfaction

- When asked how many close friends workers have at their company, more than a quarter (27%) said they have 3 close friends while 23% say they have 5 or more
- Amongst all hybrid workers, 63% reported that good work friends increase job satisfaction
    - Across generations, 70% of Millennials & Gen Z believe that having good work friends improves job satisfaction (vs. only 39% of Boomers and 55% of Gen X)
- Nearly half (46%) of hybrid workers believe that friendships play a key factor in choosing to stay at a company
    - Across generations, 53% of Millennials & Gen Z believe that work friendships play a key role in choosing to stay at a company (vs. 19% of Boomers and 40% of Gen X)

Hiring & Retention with Hybrid Work

- 45% of respondents indicate they will consider changing jobs if they are asked to return to the office full-time
- 61% of respondents say that if they look for a new job, they will only consider hybrid roles
- 76% of respondents say they perform their job better when they can choose where they work
- 72% of respondents say they feel better able to carry out their job since adopting hybrid work
- Workers Want to Work Closer to Home:
    - 60% of respondents say they would like their employer to offer a workspace within 15 minutes of their homes and 49% say they would like their employer to offer a workspace within 45 minutes of their homes
- 64% of respondents say there should be more training on working in the hybrid model

Hybrid Work & Productivity

- Among all hybrid work managers, 65% believe that employees are very productive in a hybrid work arrangement with only 5% believing that they are less productive and 30% citing a normal level of productivity. Managers and workers are on the same page as 60% of employees believe their managers think they are more productive now than before the pandemic when they were in the office full-time.

- *Differences by location and type of area:*
    - Managers in the Midwest have less confidence that their employees are very productive in a hybrid work environment than in other regions (West 74%, Northeast 68%, South 62%, Midwest 53%).
    - By location type, 78% of urban and 51% of suburban hybrid managers consider their employees to be very productive, with only 45% of rural respondents agreeing.

- *Differences by job level:*
    - 81% of C-level executives believe that employees are very productive in a hybrid work environment, as do more than 80% of managers making more than $100K per year
        - Interestingly, this perception of employees being very productive decreases along with seniority:
            - C-Level: 81%
            - Director: 70%
            - Manager: 56%
    - Nearly 70% of hybrid workers with a salary of more than $150K believe productivity has increased with hybrid work

Managers are more hands-on in hybrid work:

- The majority (70%) of C-Level respondents have changed their management approach in a hybrid model and they have more regular communication via email, phone or text and 48% have more 1:1 in-person check-ins to discuss career path, job satisfaction and bandwidth.
- Out of all managers, only 15% believe that their management approach has stayed the same as it was before the pandemic.

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About IWG PLC
IWG is the global leader in hybrid work solutions and workspace brands. We create personal, financial, and strategic value for businesses of every size. From some of the most exciting companies and well-known organizations on the planet, to individuals and the next generation of industry leaders. All of them harness the power of IWG's hybrid working platform to increase their productivity, efficiency, agility, and market proximity.

IWG's unrivaled network coverage includes approximately 3,500 locations across more than 120 countries and 83% of Fortune 500 companies are amongst our growing customer base.

Through our brands including Regus, Spaces, HQ and Signature, we help millions of people and their businesses to work more productively. We do so by providing the world's leading hybrid work platform with professional, inspiring and collaborative workspaces and digital services all available via the IWG app.

For more information, visit www.iwgplc.com and for more information on partnering with IWG, see: https://www.iwgplc.com/develop-a-location

Survey Methodology
MORTAR RESEARCH: SURVEYING HYBRID WORKERS IN THE U.S.

Mortar Research carried out a survey targeting full-time employed individuals in the US of companies that offer hybrid working. All were incentivized and each provided opt-in consent in line with MRS and GDPR guidelines.

AUDIENCE: Targeting workers in the US working for a company with a hybrid work setup
5,854 Survey Entrants | 1,015 Completed Surveys

GENERATION DEFINITIONS:

- Baby Boomers (age 59 and older)
- Gen X (ages 44-58)
- Millennials (ages 29-43) + Gen Z (ages 18-28)

This survey was taken by a total of more than 1,000 respondents on both mobile and desktop devices. All were based in the U.S. The study ran between February 3 – 7, 2023.

MULTI SOURCED APPROACH: The different recruitment methods used alongside the supplier blend removes any potential single source bias.

QUALITY CONTROL: Measures in place on both a supplier and respondent level. These include Geo IP tracking and digital fingerprint checks to ensure that there is no duplication or link manipulation.

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