



Return-to-Office Mandates and the Future of Work

How Remote, Hybrid or Onsite Work
Drives the Employee Experience

Return-to-Office Mandates and the Future of Work

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Remote work isn't a **magic bullet** for better workplace culture.

The remote and flexible work revolution that was catalyzed by the COVID-19 pandemic has reached a new level of maturity.

Remote work continues to be debated as many businesses try to bring workers back to centralized environments. Offices in the U.S. have stabilized at around [50% occupancy](#), and the U.S. workforce on average works around 30% of their days from a remote location.

Remote work options have their benefits for employees. Remote work has the [potential to increase](#)

[diversity and inclusion](#), adding new candidates to your talent pool and removing barriers to workforce participation. In our survey of 4,400 U.S. employees, those who work remotely were 27% more likely to report looking forward to their work, and 22% more likely to say people give extra effort at their company. Unsurprisingly, remote workers were also 19% more likely to report a healthy work–life balance.

However, remote work isn't a magic bullet for building a better workplace culture.

Introduction

With remote, hybrid, and onsite work all carrying different risks and benefits for employees, the best workplaces are ignoring macro trends and instead focusing on the unique needs of their people. Remote or hybrid work isn't feasible in every business, and different populations have different needs.

Great Place To Work® research shows that there isn't a magic number of days that employees should work from home to achieve the highest levels of workplace satisfaction and engagement.

Our research also shows it's not where you work, but who you work for that matters.

What matters more? Having a voice in the decision-making process. Companies that mandate where an employee works, whether the directive is for onsite, hybrid, or remote work, have lower levels of productivity and retention, and employees report poorer relationships with their managers. That all improves when employees can choose where they work.

Our research also shows it's not where you work, but who you work for that matters. Both remote and onsite workers at the typical U.S. workplace have worse experiences on the job than workers who report a great workplace culture – companies that have built cultures of trust.

The remote and hybrid work puzzle is full of nuance. One way of working isn't superior to another – they have benefits and risks, and they vary by industry. What works for one company in the financial services industry bears little resemblance to the operational needs of a manufacturing firm. The data shows that each industry must guard against risks and seize opportunities offered by hybrid and remote work.

The first step? Commit to listening to the needs of employees at every step of the decision-making process.

Methodology

Survey responses from employees at typical workplaces

Great Place To Work surveyed more than **4,400 employees aged 18 and older** in July 2023, the third year of an ongoing market study of U.S. workplaces.



51% female

49% male

< 1% non-binary or other gender



50% individual contributors

25% frontline managers

20% mid-level managers

5% executives



88% full-time workers

12% part-time workers

Survey responses from employees at Great Place To Work Certified companies

Market data was compared to **1.32 million U.S. employee survey responses collected in 2022 and 2023** from Great Place To Work **Certified™ companies**, which have built great workplaces:



43% female

54% male

1% non-binary or other gender



69% individual contributors

18% frontline managers

10% mid-level managers

2% executives



91% full-time workers

8% part-time workers



How employees feel at the typical U.S. workplace





The employee experience is **rebounding** post-pandemic

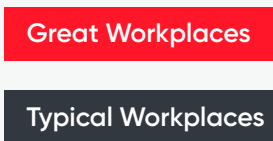
Great Place To Work collected data on the employee experience between 2021 and 2023, charting the changes in the U.S. workforce as businesses emerged from the COVID-19 pandemic.

The employee experience at typical workplaces improved an **average of 15%** across 17 different metrics between 2021 and 2023.

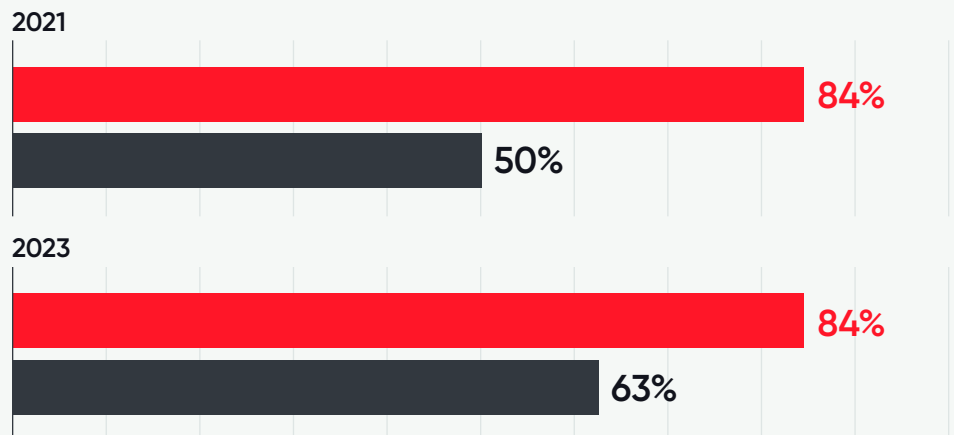
Due to the realities of the post-pandemic environment, our research found employers paid much more attention to work-life balance, employee well-being, and even improvements in pay and benefits as they struggled to retain workers.

However, these gains fall well short of the experience offered by great workplaces – companies with high-trust cultures certified by Great Place To Work’s [proprietary methodology](#).

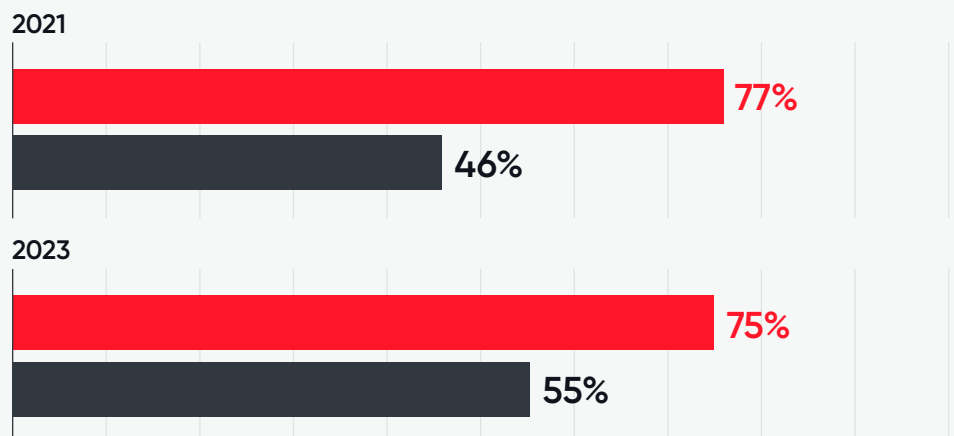
More employees are having a positive experience at great workplaces



Healthy Work–Life Balance



Fair Pay



Source: Great Place To Work surveyed more than 440 U.S. employees in 2021, and more than 4400 U.S. employees in 2023 as part of a three-year market research study. More than 1 million employees in 2021 and 1.32 million employees in 2023 were surveyed at Great Place To Work Certified companies to establish the “great workplaces” benchmark.

The persistent gap for typical U.S. workplaces demonstrates the need for innovation and new tactics to address mental health and psychological safety in the workplace.

and economic forces. The data reveals the need for companies to recommit to listening, and preserve commitments to diversity, equity, inclusion & belonging.

Companies that build trust across the organization are rewarded with higher levels of psychological health and retention. Employees at the typical U.S. workplace are 22% less likely to look for another job when they report having a psychologically and emotionally healthy workplace.

Companies that build trust across the organization are rewarded with higher levels of psychological health and retention.

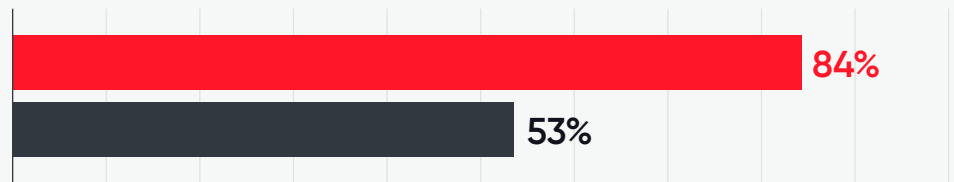
Psychological and emotional health at work is also affected by macro trends that affect people's lives, including social, political,

Well-being at typical U.S. workplaces hasn't improved

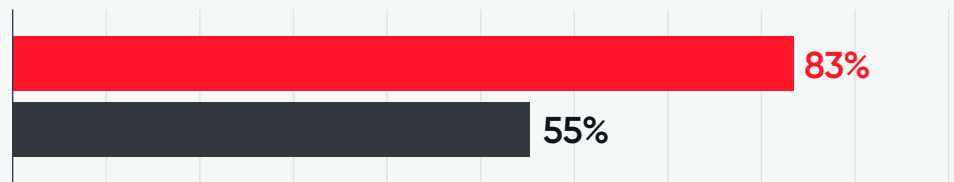
Despite improvements in work-life support and pay in the post-pandemic workplace, employees' psychological and emotional health hasn't budged in the last two years.

Psychological and Emotional Health

2021



2023



Great Workplaces

Typical Workplaces

Source: Great Place To Work surveyed more than 440 U.S. employees in 2021, and more than 4400 U.S. employees in 2023 as part of a three-year market research study. More than 1 million employees in 2021 and 1.32 million employees in 2023 were surveyed at Great Place To Work Certified companies to establish the "great workplaces" benchmark.

How great workplaces target psychological health

Again and again, our research has shown that **trust is the key ingredient** in creating high performing, resilient workplace cultures.

Leaders that build trust with their employees find higher levels of well-being, more productivity, better customer service, and higher stock prices.

Trust in the workplace, according to the Great Place To Work model, is comprised of three elements: respect, credibility, and fairness.

Are leaders credible when they speak to employees? Do leaders extend respect and appreciation to every employee, regardless of their role or personal background? Is the workplace fair, where everyone has an opportunity to contribute, build a meaningful career, and receive their fair share of the fruits of their labor?

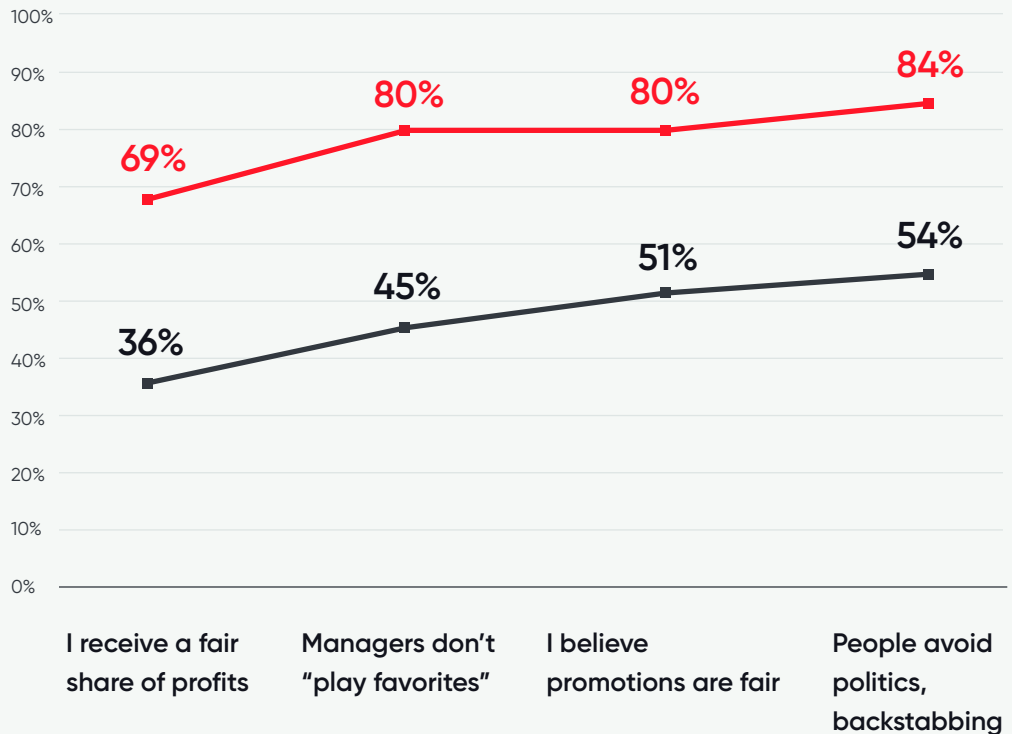
Compared to the typical U.S. workplace, fairness is one of the top ways that great workplaces stand out.

Great workplaces outperform typical workplaces on fairness

Four of the top five differences between typical workplaces and great workplaces are connected to fairness at work.

Great Workplaces

Typical Workplaces



Source: Great Place To Work surveyed more than 4,400 employees at typical U.S. workplaces in July of 2023 as part of a three-year market study. Responses were compared to 1.3 million survey responses from Great Place To Work Certified companies received in 2022 and 2023.

Fairness is challenged amid the rise of hybrid and remote work

Fairness has always been an issue for workers – but hybrid and remote work are changing how those principles play out in the workplace.

Now, employees are asking:

- **Do I have the same opportunity to work a hybrid schedule?**
- **Is my pay consistent and equitable, and how does where I work impact compensation?**
- **Does where I work exacerbate or alleviate the impact of unconscious bias?**

Managers in particular [face new challenges in building trust](#) and creating a work environment where every employee feels seen and heard. The best leaders are intentional and systematic.

To support fairness for hybrid and remote workers, leaders should increase communication and consider increasing opportunities for one-on-one connection.

A regular one-on-one meeting with a manager can have a [dramatic impact on equity](#) across a work group or overall organization. When every employee gets face time with their manager, employees are more likely to feel heard, more likely to identify and pursue opportunities for advancement, and more likely to feel treated as an equal and respected member of the team.

When managers don't build individual relationships with their direct reports, critical information is unevenly distributed and bias is more prevalent in development and promotion processes. Managers are less likely to have context around external factors and life events impacting an individual employee, and will have fewer avenues for addressing difficult conversations when they arise. For remote and hybrid employees, relationships with their manager are less likely to occur organically, so organizations should take steps to reinforce the connection between employees and their people leaders.

Challenges and benefits of remote work

Remote work doesn't guarantee a better experience for employees. However, at the typical U.S. workplace, employees who work remotely are having a more positive experience.

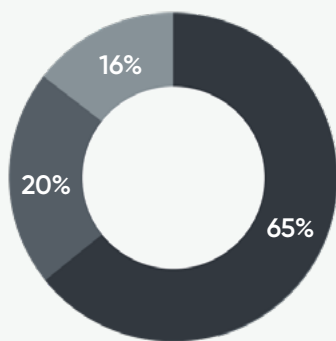
Fully remote employees are more likely to say they look forward to their work each day compared with onsite employees. Remote employees are also more likely to report that people give extra effort, are more willing to cooperate and collaborate, and have an overall healthy workplace environment.

One explanation for the gap between remote and onsite workers: Employees of color reported finding a reprieve from unconscious bias and code switching when working remotely.

That doesn't mean that companies must embrace fully remote work to be inclusive. Instead, great workplaces are finding ways to meet the needs of their employees and provide support to all workers regardless of where they work.

Remote employees are more likely to look forward to work

Who was surveyed



Onsite Workers
Hybrid Workers
Remote Workers

Looking forward to work	+27%
Managers don't "play favorites"	+23%
Employees give extra effort	+22%
A psychologically and emotionally healthy workplace	+19%
High levels of cooperation	+19%
People avoid politics, backstabbing	+18%

Source: Great Place To Work surveyed more than 4,400 employees at typical U.S. workplaces in July of 2023 as part of a three-year market study.

What companies with onsite workers should consider

01 Survey employees about what appeals to them about remote work.

Often, remote work policies are offering flexibility that has very little to do with the actual location where work is done. Learn whether employees value remote work because it allows them to pick up children from school, or if remote

work is a welcome reprieve from toxic behavior in the office. There might be alternatives to remote work that still help employees who must work onsite balance their individual needs with work responsibilities.

02 Consider how you can make a job more flexible when remote work isn't an option.

Can you offer flextime, or [adjust shift schedules](#) to ensure workers can schedule doctor's visits and manage family responsibilities? Are you communicating efficiently

and effectively about schedules with advance notice to affected employees? Is a four-day workweek an option for some roles?

03 Lead with your values.

Tie every decision about your remote work policy clearly to commitments to customers and employees. Make sure that in-person activities have value for both your organization and for employees. Help frontline

employees who don't have remote work options find special meaning in their work, and communicate about how their efforts are delivering on your brand mission.

Return-to-office mandates and employee performance



7 out of 10 U.S. employees report that their employer mandates where they work.

Where employees work isn't as predictive of performance as whether or not an employer seeks employee input on its remote and hybrid work policies.

However, an employer mandate for where employees work is by far the norm for typical U.S. companies.

Magnet vs. mandate

The data doesn't overwhelmingly favor either remote or in-person work, but does paint a clear picture of the risks and opportunities for both approaches. Companies can either mandate where employees work, or they can offer latitude within a framework that sets clear protocols and expectations.

Cisco, No. 1 on the 2023 *Fortune* Best Companies to Work For® List, has chosen a "magnet" versus a "mandate" approach. It uses town

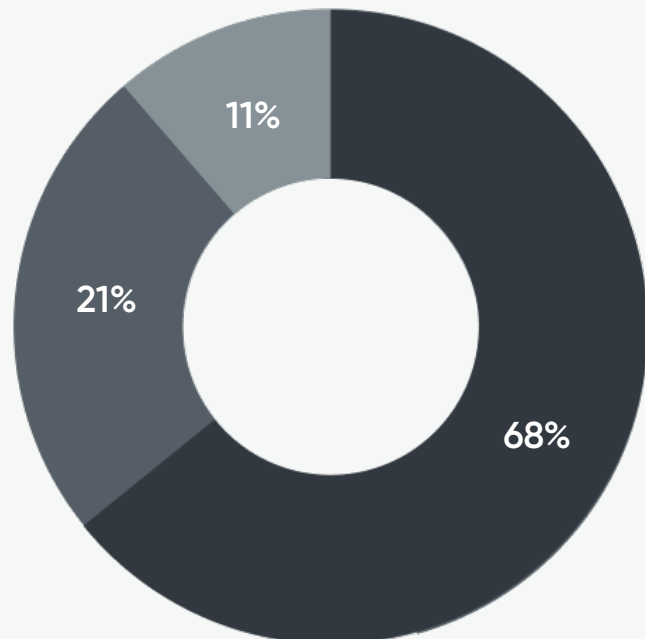
halls, team gatherings, hackathons, and career coaching sessions to attract workers to the office, delivering a valuable experience in exchange for employees' presence onsite. And the Best Workplaces™ are using surveys and employee resource groups (ERGs) to find out what flexibility looks like for employees and which options for improving employee experiences are the most meaningful.

Who determines where you work?

My employer mandates where I work

My team or work group decides what's best for us

I can make the decision that's best for me



Source: Great Place To Work surveyed more than 4,400 employees at typical U.S. workplaces in July of 2023 as part of a three-year market study.

Mandates at typical U.S. companies

01 Mandates pose risks to the employee experience for both onsite and remote workers

Having a voice, either on the individual or team level, is connected to key business outcomes for all employees, regardless of where they work.

02 When employees have a say in where they work, retention improves.

Employees who report being able to decide where they work are more likely to stay with their company long-term.

03 When employees have a say in where they work, they are less likely to “quit and stay.”

With improved engagement, employees are more likely to go the extra mile to serve customers and improve workflows.

04 Employees who have a say in where they work have better relationships with managers.

Mandates on where an employee works threatens to undermine employee trust.

05 Being able to choose where you work closes some of the gap between great workplaces and the typical U.S. workplace.

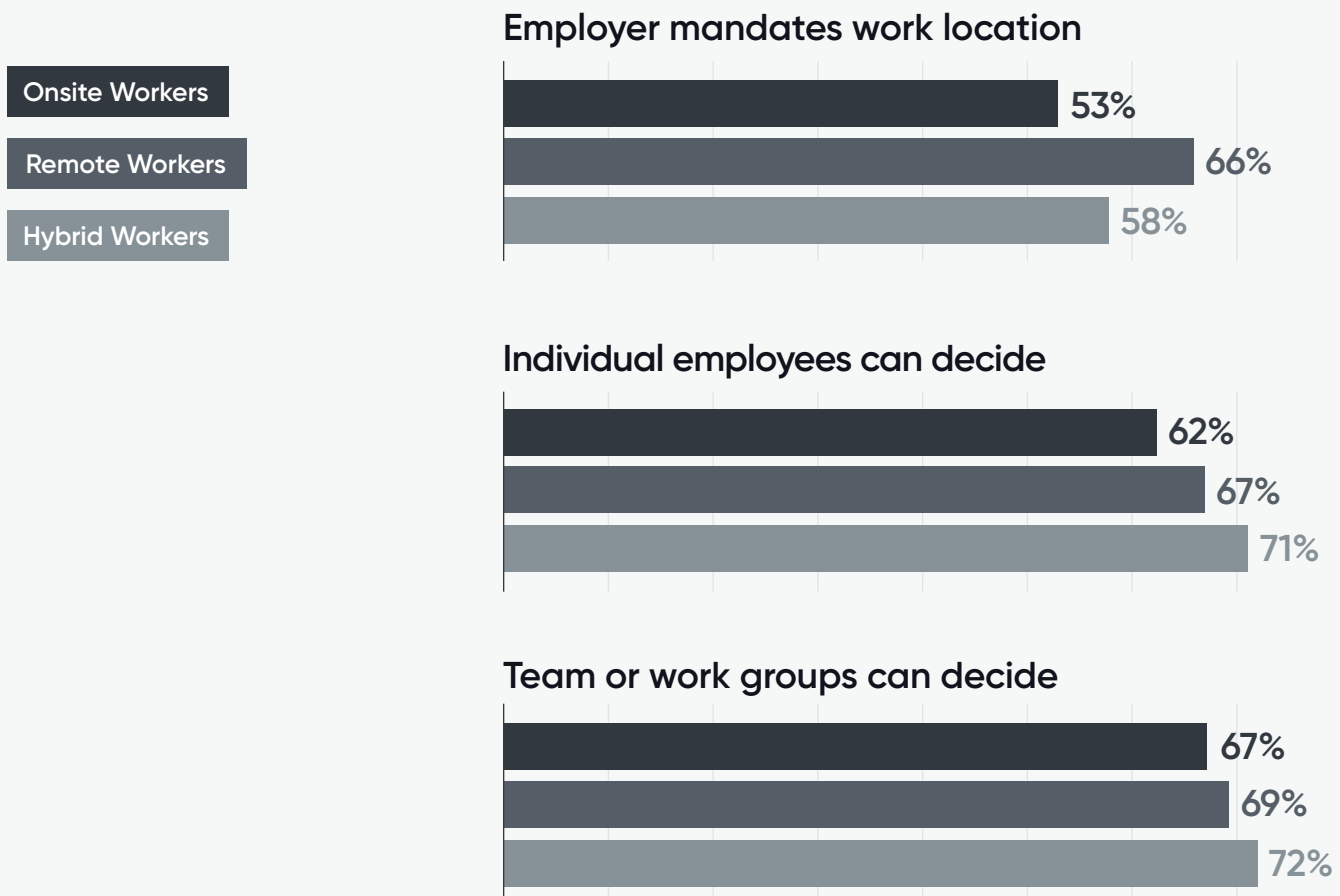
Great workplaces still offer a better employee experience than the typical U.S. workplace even if there is not a mandate for where employees work.

Mandates and productivity

Productivity was lower for both onsite and remote employees when their employer mandated where they work.

When individual employees or their team can decide on a policy that suits their needs, more employees at typical U.S. workplaces report going the extra mile.

Fewer mandated employees report giving extra effort at work regardless of work location



Source: Great Place To Work surveyed more than 4,400 employees at typical U.S. workplaces in July of 2023 as part of a three-year market study.

Mandates and retention

Turnover is lower when employees can choose where they work

3x

Employees who can choose between remote, hybrid, or onsite work are three times more likely to want to stay.

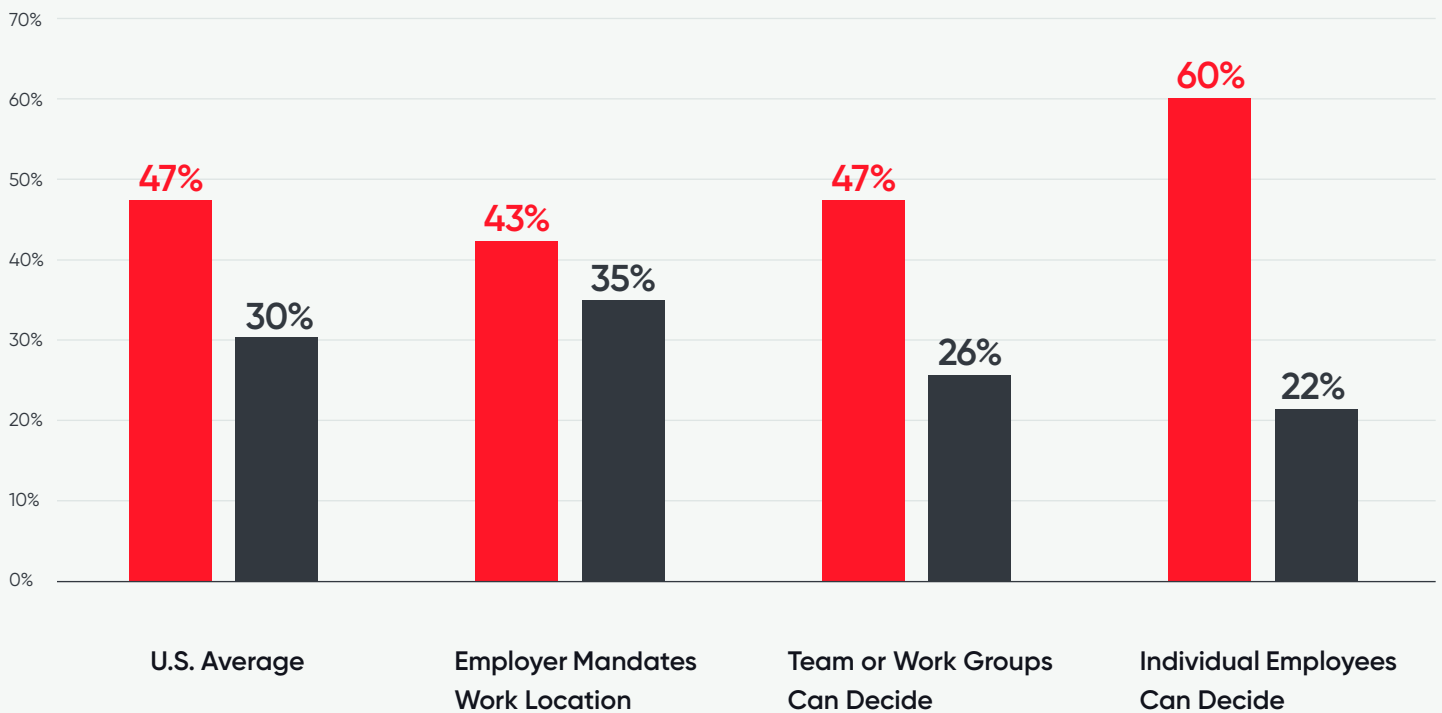
2x

Employees whose teams or work groups choose their remote work policy are two times more likely to want to stay.

Turnover risk is lower when employees can choose where they work

I want to stay at my company

I do not want to stay at my company



Great Place To Work surveyed more than 4,400 employees at typical U.S. workplaces in July of 2023 as part of a three-year market study.

“Quit and stay” risk is higher with mandates

Employees who don't quit despite wanting to leave the company are less likely to be engaged and give extra effort to achieve company goals.

Who determines where you work?

I want to stay at my company

I would like to quit, but don't feel that I can

Employer mandates work location

43%

8%

Team or work groups can decide

47%

8%

U.S Average

47%

7%

14x

Employees who can choose between remote, hybrid, or onsite work are 14 times less likely to “quit and stay.”

Individual employees can decide

60%

4%

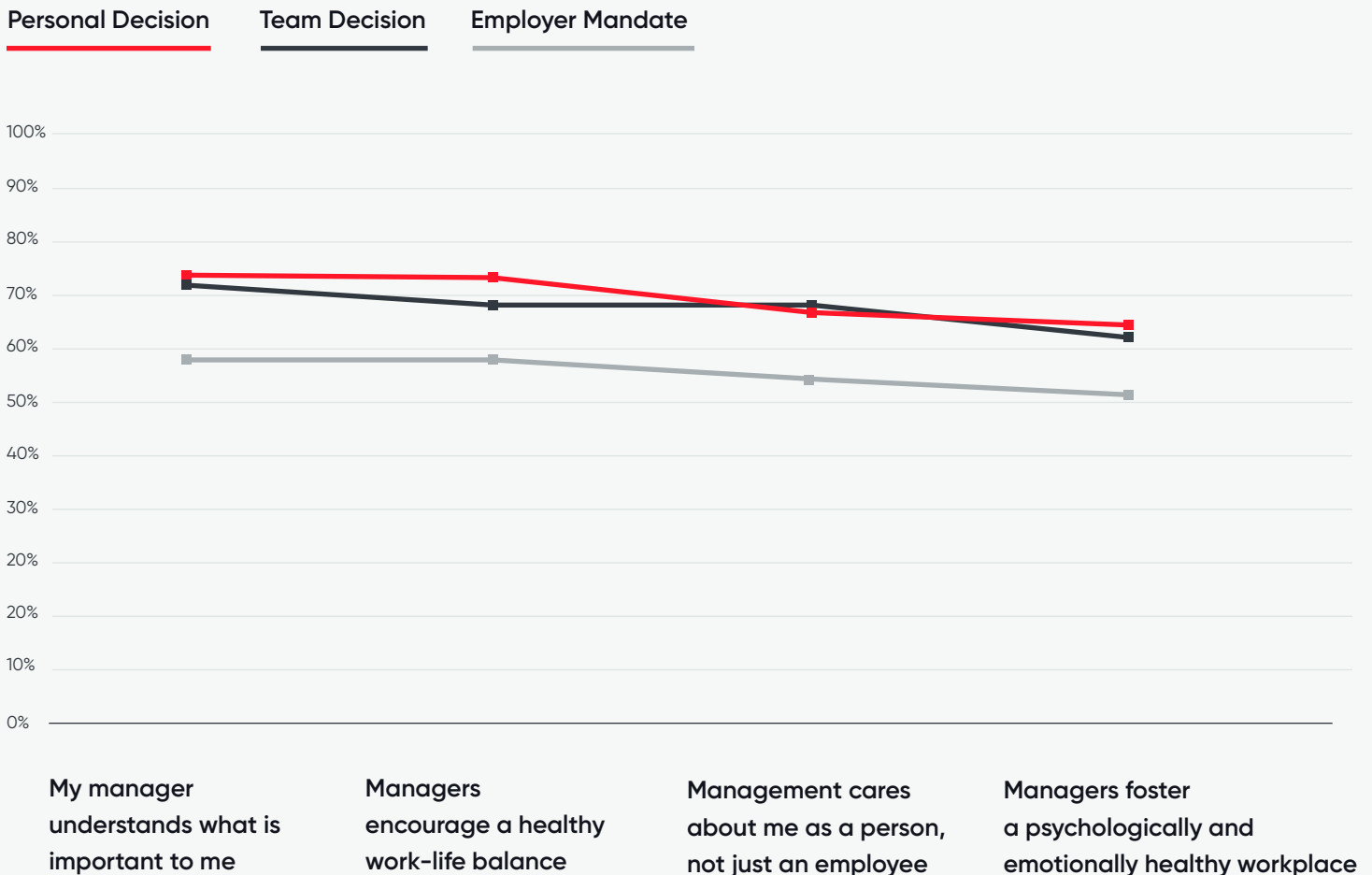
Great Place To Work surveyed more than 4,400 employees at typical U.S. workplaces in July of 2023 as part of a three-year market study.

Mandates and trust with managers

Employees whose work location is mandated by their employer have a worse perception of their workplace overall and poorer relationships with their managers. For executives, the data is a reminder that decisions about remote work policy made

at the macro level can have complicated consequences for overall workforce and manager effectiveness. When mandates can't be avoided, leaders should consider how they can best support people leaders across the organization.

Employees with mandated work locations have a worse perception of their workplace and managers



Great Place To Work surveyed more than 4,400 employees at typical U.S. workplaces in July of 2023 as part of a three-year market study.

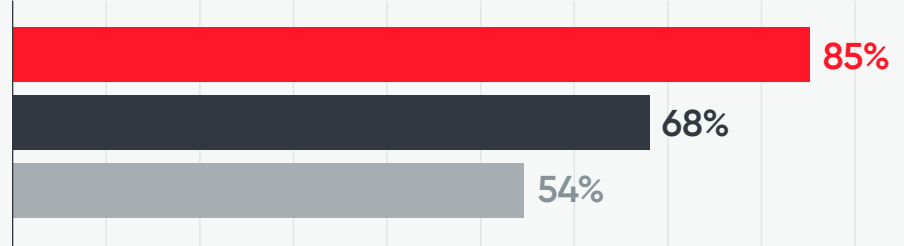
Choosing where you work narrows the gap between typical workplaces and great workplaces.

- Great Workplaces
- Personal Decision at Typical Workplaces
- Employer Mandate at Typical Workplaces

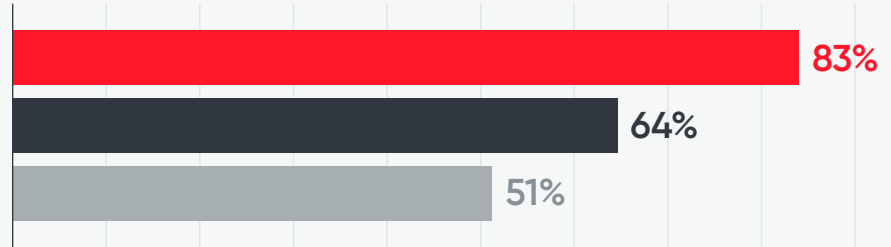
Managers encourage a healthy work-life balance



Management cares about me as a person, not just an employee



Managers foster a psychologically and emotionally healthy workplace



Source: Great Place To Work surveyed more than 4,400 employees at typical U.S. workplaces in July of 2023 as part of a three-year market study.

Remote and hybrid work across industries



Remote work, hybrid work, and onsite work all have their own **benefits and risks** for your workplace culture.

Those risks and benefits change depending on the industry your company operates in and will be unique to each individual company and its employee base.

The debate over whether remote, hybrid, or neither is the “right” way to work is misguided, and this data proves the case.

Where we work, how we work, and what works best for an individual employee will differ greatly from person to person. Business leaders must understand how to support their current workforce – not a hypothetical group of people.

takes work, but this data provides a roadmap to get you started.

Leaders can use these benchmarks to get curious about the nuances of their industry and company and investigate their own data to develop action items for improving the employee experience.

Here's how the data from typical U.S. workplaces suggest leaders should adapt their efforts depending on their industry:

Leaders should adapt their efforts depending on their industry.

There is no magic formula. Finding the right solution for your people

Technology

Leaders in this industry should:

01

Create unique experiences for remote employees as well as those onsite.

02

Increase communication and listening to ensure remote workers stay connected to top management.

03

Ensure job performance is assessed based on outcomes (not inputs) so employees working onsite don't feel pressured to prioritize visibility over impact.

Remote employees in technology are more likely than onsite employees to report:

+17%

I can take time off when needed

Onsite employees in technology are more likely than remote employees to report:

+20%

Special and unique benefits

+21%

Management has a clear view of the future for the company

+20%

Management keeps its promises

Professional services & consulting

Leaders in this industry should:

01

Look for ways to extend flexibility and wellness offered to hybrid and remote employees to workers who have to report to the office.

Remote employees in professional services are more likely than onsite employees to report:

+21%

People avoid politics, backstabbing

+16%

High levels of cooperation

+12%

I can take time off when needed

Health care

Leaders in this industry should:

01

Find ways to communicate respect and appreciation for the service of onsite employees.

02

Investigate the unique needs of workers in onsite roles and create benefits that are specially catered to them.

03

Recommit to employee listening to ensure every employee feels seen and heard, and take clear and meaningful action on feedback raised by employees.

Remote employees in health care are more likely than onsite employees to report:

+24%

Special and unique benefits

+22%

My manager understands what is important to me

+14%

Every employee, regardless of role, is valued as a full team member

Finance

Leaders in this industry should:

01

Increase efforts to communicate with remote workers.

02

Help managers connect with their direct reports and learn about their lives outside of work.

03

Tie remote workers to a sense of purpose and impact in their roles.

Onsite employees in finance are more likely than remote employees to report:

+24%

Management keeps me informed

+22%

I make a difference

+21%

Management cares about me as a person, not just an employee

Manufacturing & production

Leaders in this industry should:

01

Prioritize activities to help onsite employees have a little fun and celebrate their work.

02

Ensure that onsite employees are recognized for their contributions.

03

Focus on listening and communicating how leaders are responding to employees' concerns.

Hybrid employees in manufacturing are more likely than onsite employees to report:

+32%

I have fun at my workplace

+31%

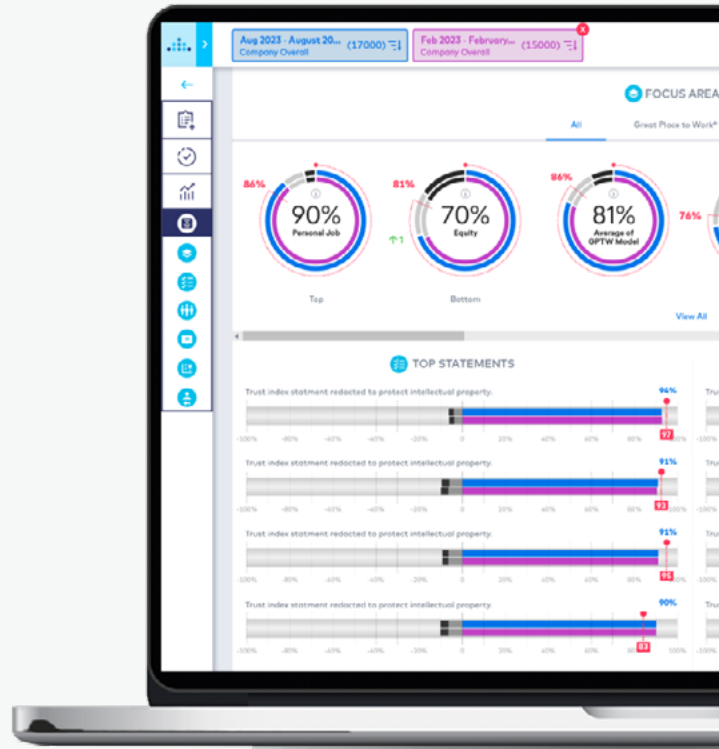
Every employee can receive special recognition

+27%

Employees have a voice in decisions that affect them

Use Great Place To Work to Guide Your Strategy

Get Started Today



“Anytime we go to do any sort of large endeavor now, we pull up our Great Place To Work [results] and get a sense of how that demographic is feeling”

Jem Janik,
People and culture communications manager,
Messer Americas

Trying to update your hybrid or remote work policy?

Understand more about your employee experience using Great Place To Work’s proprietary model developed from over 30 years of research.

With a Great Place To Work subscription, you’ll have access to:

Pulse surveys. Get immediate feedback while navigating changes like return-to-office.

One-on-one coaching. Meet with our culture coach team to unpack

your data and identify personalized action items for your leadership team.

Insights from leading workplaces. Learn how award-winning companies are navigating the world of hybrid and remote work.

Great starts here. [Become Great Place To Work Certified™](#) and signal to job seekers that your workplace offers a more rewarding experience, no matter where employees do their work.

Great Place To Work®

About us

Great Place To Work is the global authority on workplace culture. We're on a mission to change the way the world works by creating more resilient, successful, sustainable businesses. Great Place To Work gives leaders and organizations the recognition and tools to create a consistently and overwhelmingly positive employee experience.

Learn more at greatplacetowork.com.

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