

NEW REALITIES SURVEY SERIES: *AEC Employee Perspectives on Reopening*

AUGUST 2021



NEW REALITIES

The 2020 coronavirus pandemic and its economic impact have created unprecedented conditions for architecture, engineering, and construction (AEC) companies worldwide. The industry is accustomed to economic cycles, but we have never experienced today's combination of public health threats, disruption of our traditional ways of working, and sudden, severe economic challenges for AEC firms and our clients.

With encouragement from our clients, Cameron MacAllister Group launched a series of brief surveys addressing these "New Realities" in the design and construction industry. This report is the seventh in our series, focusing on the future of the AEC workplace from the perspective of AEC professionals and is based on a survey of 1,335 diverse professionals representing nearly 50 firms from across the United States. The survey was conducted online between June 25 and July 15, 2021. As always in Cameron MacAllister Group research, the names of contributors and individual firms remain strictly confidential.

INTRODUCTION

In the summer of 2021, a significant proportion of the AEC industry is in the process of transitioning from the working arrangements that have been in place since March 2020 to the "new normal," adopting the working arrangements that they will be expected to adhere to for the foreseeable future. While over half of the AEC workforce reported working fully remotely in early July 2021, 3 in 4 professionals indicate that they spend at least half of their working hours in their offices by September 2021. Most also indicate that their firms will continue to offer remote work options going forward, representing a radical transformation within an industry where remote work was considered an anomaly just 18 months ago. This transition period provides important opportunities for reflection upon lessons learned from the pandemic and for consideration of how to best support the needs of an increasingly diverse workforce. Against this backdrop of change, many in our industry have also experienced a talent shortage, with many firms experiencing significantly higher levels of staff turnover.

To better understand how these complex dynamics may shape the future of work in the AEC industry, our team realized that we needed to hear from individuals from a wide range of backgrounds and at all levels of practice, rather than hearing exclusively from firm leaders. We, therefore, developed a short survey and asked our clients to distribute it to their employees. This study was designed to explore several key areas of inquiry:

- What has working remotely been like for AEC professionals?
- As firms transition back to in-person operations, how are employees experiencing the change?
- How do AEC professionals want to work going forward?
- Is there a disconnect between employers and employees on these issues? If so, will it lead to resignations?
- Are there demographic patterns in employee perspectives on reopening, suggesting that remote and hybrid work issues might overlap with issues of Justice, Equity, Diversity, and Inclusion (JEDI)?

We received high levels of interest in the project, collecting 1,335 completed responses from individuals representing 47 firms nationwide. Of these 47 firms, about 30 had more than 10 employees representing varying levels of seniority participating, suggesting that the survey was distributed to the firm's entire staff, rather than to a smaller group.

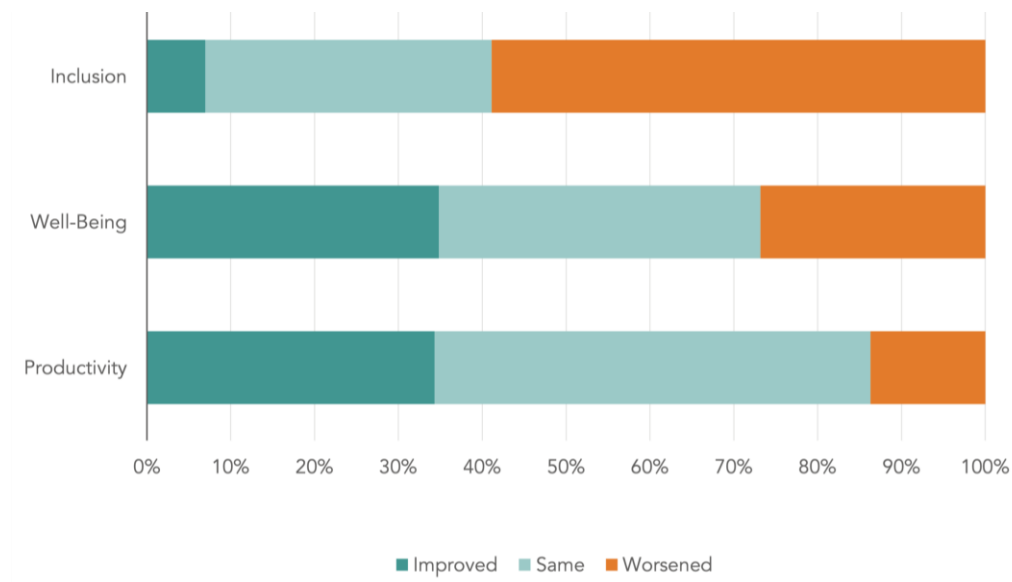
The data that we collected through these efforts reveals several overarching trends:

1. **AEC professionals overwhelmingly support hybrid work, which allows individuals to split their time between the office and remote locations.** The vast majority of AEC professionals – 93% – would prefer to mix their time between remote and in-office settings going forward.
2. **Getting hybrid right is a JEDI Issue:** Women, BIPOC professionals, and parents of young children are most likely to want hybrid work options – and most willing to leave their jobs if their preferences aren't met.
3. **To retain top talent, firm leaders may need to adopt progressive policies and culture.** While most professionals indicate that their firms will be offering some form of hybrid work option, most staff also believe that their employers would prefer that all employees return to the office full-time. This disconnect between stated policy and leaders' preferences for employee behavior has significant implications for the ultimate success of firms' experiments with hybrid work. Employees crave greater cultural and logistical support for hybrid work: When asked about the support that they would like to receive from their employers as they transition to their post-pandemic working arrangements, the common responses focused on setting behavioral and interpersonal expectations that might make hybrid work more successful in the long run.

EXPERIENCES OF PANDEMIC-ERA REMOTE WORK

Over the last 18 months, nearly all AEC professionals have worked remotely at least part of the time. Our research suggests that most professionals have personally experienced remote work as either neutral or as a positive, with stable or increased personal productivity and stable or decreased work-related stress. Meanwhile, however, experiences of inclusion and team cohesion have suffered broadly, with 6 in 10 professionals reporting diminished levels of connection to their colleagues. As we will see in several places in this report, this tension between personal well-being and team cohesion is at the heart of how AEC professionals seem to be thinking about the future of remote and hybrid work and is therefore worthy of industry leaders' careful consideration.

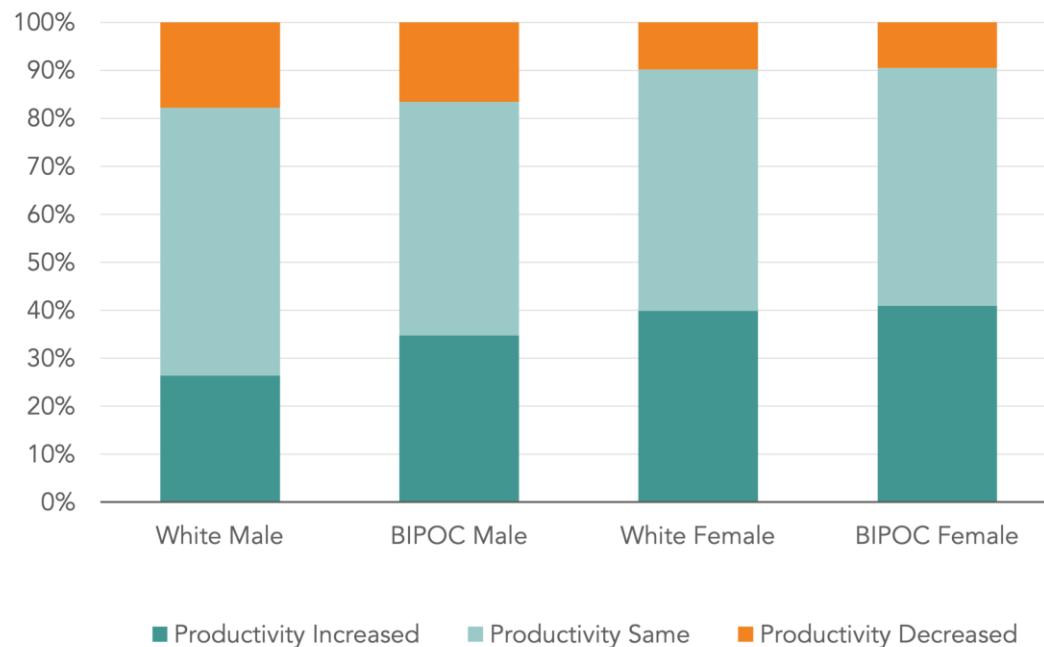
The data reveals striking demographic trends in professionals' experiences of pandemic-era remote work: while white men and senior leaders are most likely to report diminished experiences while working remotely, female and BIPOC professionals are most likely to report that the shift to remote work resulted in improvements to their productivity and well-being. Research conducted prior to the pandemic suggests that these groups have historically suffered from some of the highest levels of work-related stress and exclusion in our industry. In essence, pre-pandemic professional culture wasn't working particularly well for members of these groups. It's therefore particularly striking to see that the shift to remote work has disproportionately benefited these groups of professionals. Going forward, embracing remote and hybrid working arrangements is likely to be an important part of our industry's ongoing work on issues of JEDI.



HOW DO YOU BELIEVE THAT THE SHIFT TO REMOTE WORK HAS IMPACTED YOUR INDIVIDUAL PRODUCTIVITY?

On the whole, respondents reported neutral or positive experiences of personal productivity while working remotely during the pandemic, with 34% reporting productivity gains, 52% reporting stable productivity, and only 14% reporting decreases in productivity. While the generally positive assessments of remote work productivity mirror what we have heard from firm leaders in other iterations of our New Realities research series, it does seem that individuals' assessments are more positive on average. For instance, 1 in 4 firm leaders reported declines in productivity when surveyed in February 2021, suggesting that firm leaders are roughly twice as likely as individual professionals to report losses in productivity.

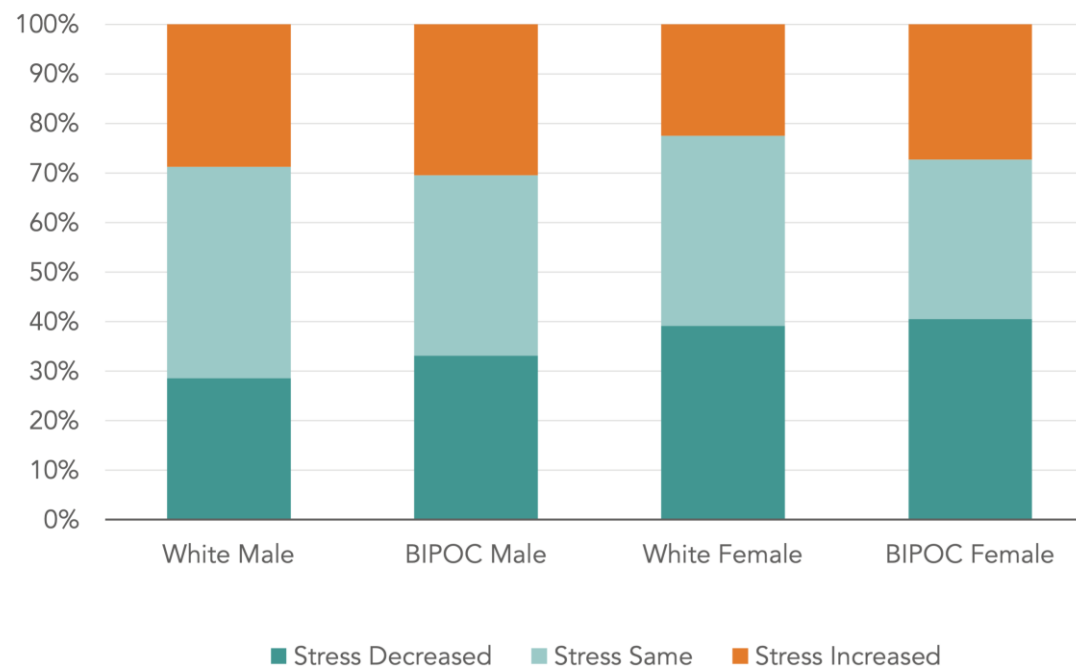
We observed important demographic trends in reported productivity as a result of the shift to remote work. While White men were most likely to report productivity losses, women were most likely to report gains during this time. Age was also strongly correlated with professionals' experiences, with those age 30-39 most likely to experience productivity gains while those over 60 were most likely to experience declines.



HOW DO YOU BELIEVE THAT THE SHIFT TO REMOTE WORK HAS IMPACTED YOUR WELL-BEING?

When asked about the impact of the shift to remote work on well-being, professionals also suggest that the shift has been neutral-to-positive, with over 7 in 10 reporting that their work-related stress levels had decreased or stayed about the same. Almost a third of respondents report that work-related stress has increased as a result of the shift. Employees' perspectives on individual well-being contrast with their employers' perceptions: when asked a similar question in February 2021, nearly 6 in 10 firm leaders reported that most employees had experienced increases in work-related stress because of the shift to remote work.

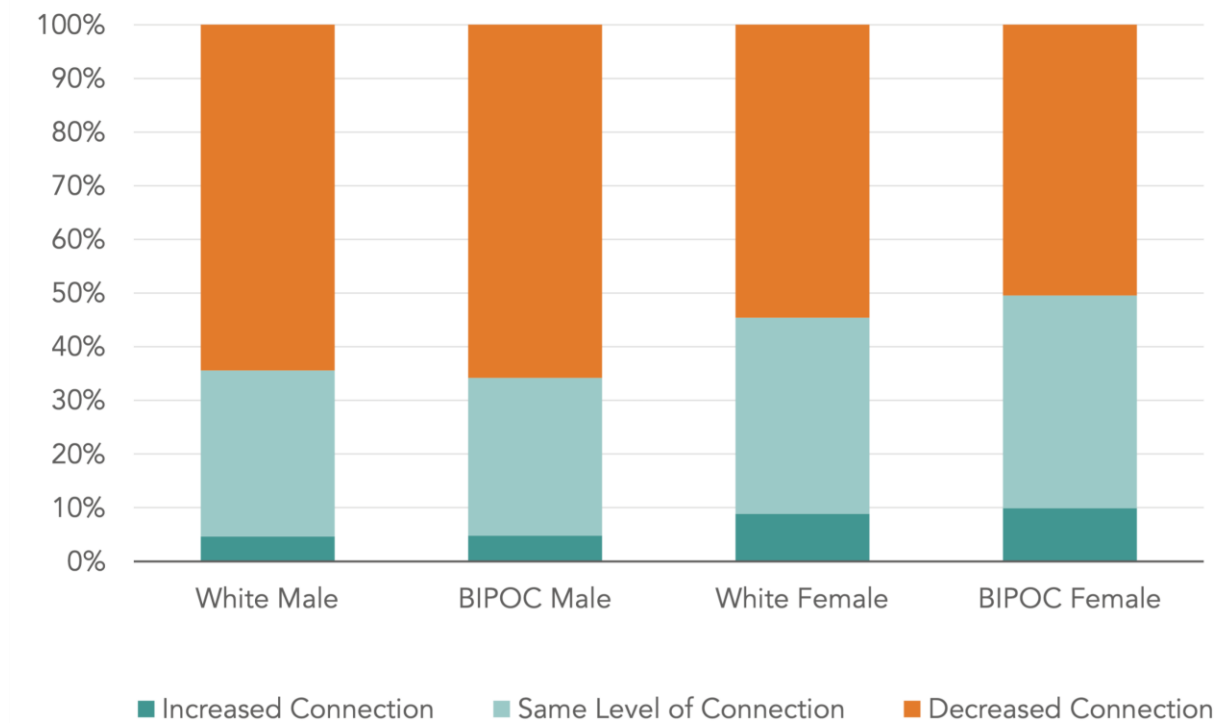
Again, we observed striking demographic trends in perceived impacts of the shift to remote work. White male professionals are just as likely to say that they have experienced increases in stress as they are to say that stress has decreased: 29% reported increased stress and 29% reported decreased stress. Meanwhile, both white and BIPOC female professionals are significantly more likely to report improvements in well-being: 40% of women report decreased stress while only 24% report an increase in stress.



HOW DO YOU BELIEVE THAT THE SHIFT TO REMOTE WORK HAS IMPACTED YOUR LEVEL OF INCLUSION WITHIN YOUR ORGANIZATION?

Experiences of inclusion and social cohesion have suffered broadly as a result of last year's shift to remote work. The majority of AEC professionals – 6 in 10 – report feeling less connected to their colleagues while working remotely over the last 15 months. Meanwhile, just 7% report feeling more connected to colleagues.

Against this backdrop of decreased connection, we observed interesting bright spots for groups that are underrepresented in the field. BIPOC women are twice as likely as white men to report experiencing increased connection and are 15% less likely to report decreased levels of connection. Similarly, young women are significantly more likely than older men to report experiencing improvements in connectivity as a result of the shift to remote work.



NAVIGATING THE REOPENING PROCESS

Early in the summer of 2021, the transition to in-office operations was just beginning for many professionals, with over half of respondents indicating that they were still working from home. Professionals anticipated that this would change quickly; however: 3 in 4 reported that they anticipated working at least half their time in-office by September 2021.

Even with new uncertainty due to changes in COVID-19 caseloads and local transmission rates, it's evident that our industry is rapidly moving from a planning phase into a change management phase toward establishing new norms for post-pandemic work. With so much change underway, we explored how AEC professionals are experiencing the change itself, including two-way communications between leaders and staff as well as individuals' understanding of policies and the cultural expectations set by firm leaders.

We identified several important trends in this data:

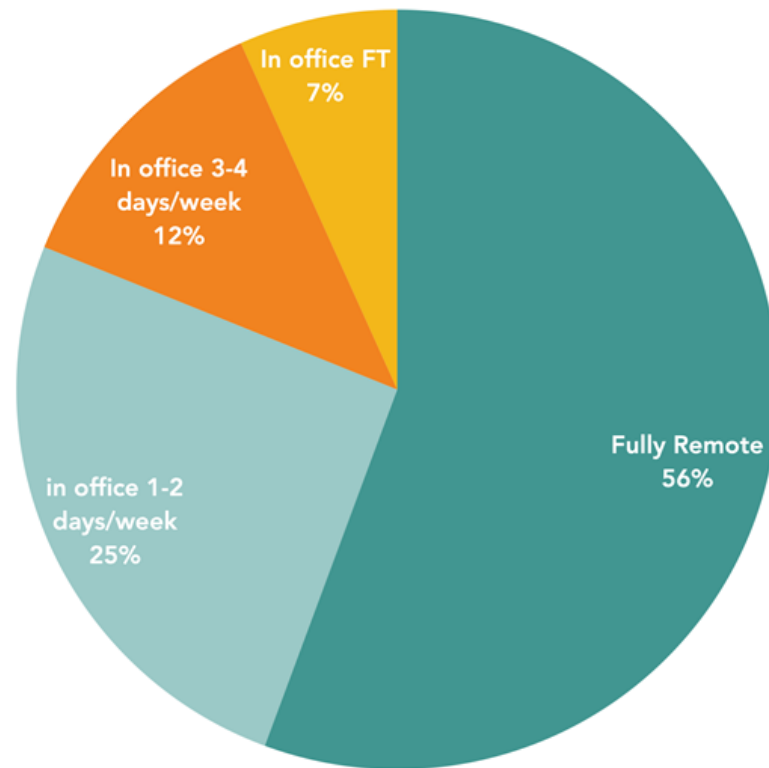
Empathy is Essential: Those who feel that leaders haven't considered their perspectives are more likely to say they will quit if their preferences aren't met. Regardless of the eventual plan adopted, it's therefore worthwhile to demonstrate that employees' perspectives have been considered in the process of formulating plans for post-pandemic work.

Overall plans are clear, but not specific: Even though firms may have reopening timelines in place, many professionals report that their firm leaders have yet to articulate the specifics of what "return to work" looks like. While most report that their employers have communicated an overall post-pandemic plan, only half report that specific policies and expectations have been communicated clearly.

Perceived disconnect between stated policy and leader expectations: While most professionals report that their firm's leaders will allow some form of remote work, most also report that their firm's leaders prefer that nearly all employees return to the office full-time. This disconnect between stated policy and the cultural expectations being communicated – consciously or not – by firm leaders has the potential to create situations where employees are offered remote work benefits--but remain unsure whether they are truly empowered to take advantage of these benefits. It could also create an environment where bias against remote workers could easily result, with leaders' preferences for in-person work leading them to provide those who work in-person more frequently with enhanced opportunities, recognition, and feedback. In such environments, hybrid work policies are unlikely to be successful and may adversely impact the career trajectories of those who take advantage of hybrid work options in the process.

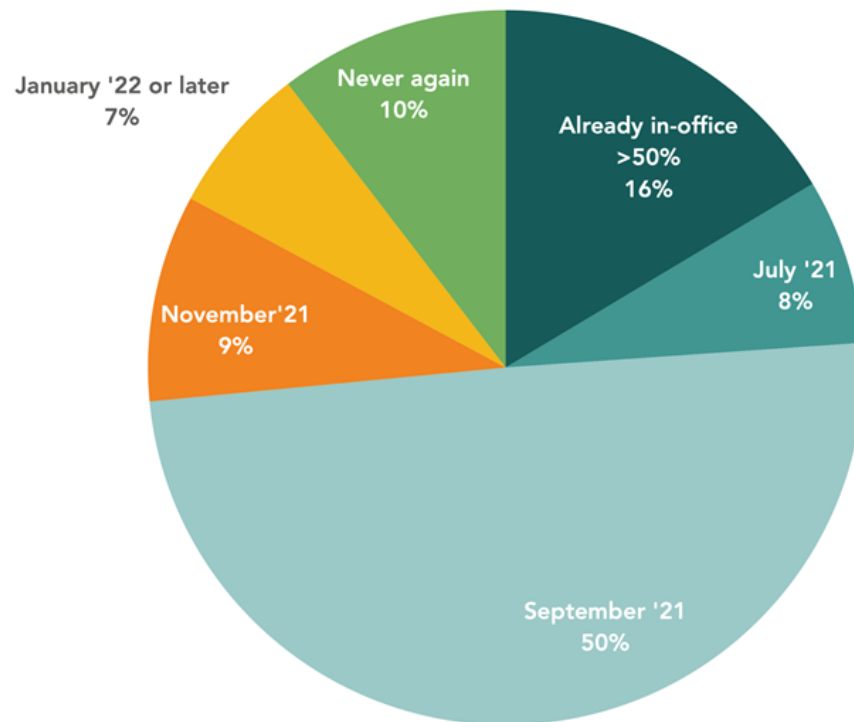
WHICH OF THE FOLLOWING MOST CLOSELY REFLECTS YOUR CURRENT WORKING ARRANGEMENT?

In early July 2021, most AEC professionals reported working the bulk of their time remotely, with 56% fully remote and an additional 25% working from the office 1-2 days per week. By comparison, just 7% reported working from their offices full-time.



AROUND WHAT DATE DO YOU EXPECT TO SPEND AT LEAST 50% OF YOUR TIME IN THE OFFICE?

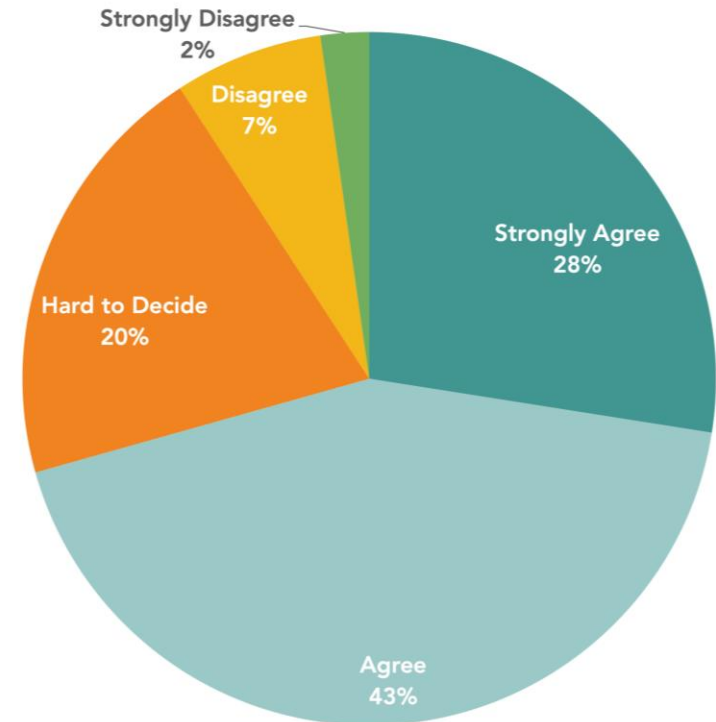
While most professionals reported working the bulk of their time remotely in early July 2021, they also reported that this was slated to change quite soon. Nearly 3 in 4 report that they expect to work at least half of their time in the office by September of 2021. Meanwhile, 16% report that they expect to make the transition later, with 9% saying they will make the shift by November of 2021 and 7% reporting that they will make the shift in January 2022 or later. About 1 in 10 professionals reports that they don't ever anticipate working the majority of their time in the office. It's worth noting that, at the time that this survey was conducted, new daily case rates for COVID-19 were at some of their lowest levels since March 2020. With the surge in cases that has occurred over the summer, we have heard anecdotally that some of our clients have revised or pushed back reopening timelines since this survey was conducted.



MY FIRM'S LEADERS HAVE CONSIDERED PERSPECTIVES LIKE MINE WHILE FORMULATING PLANS AND POLICIES FOR POST-PANDEMIC WORK.

Approximately 7 in 10 AEC workers agree or strongly agree that their employers have considered perspectives like theirs while formulating plans and policies for post-pandemic work. Meanwhile, about 20% report that it's "hard to decide", while the remaining 10% disagree or strongly disagree. The comparison of individuals who believe that their perspectives have been considered and those who don't suggests that firms that have approached post-pandemic work with empathy are less likely to face retention struggles in the coming year. Professionals who say that their firm leaders have considered perspectives like theirs are significantly less likely to say that they will leave their jobs within the next year if their preferred working arrangements aren't supported.

Post-pandemic work policy is strongly correlated with beliefs regarding the degree to which one's employers have considered their perspectives on remote and hybrid work. Those working in firms that have adopted the most customizable remote work policies ("Employees will be able to determine how often they work from the office, with ability to be fully remote") are most likely to believe that their perspectives have been considered. Those who report that remote work will not be allowed going forward are least likely to believe that their perspectives have been considered. Communication from firm leaders is equally important: Those who report that their firm's leaders have clearly communicated specific policies, procedures and cultural expectations regarding post-pandemic work are significantly more likely to believe that their perspectives have been considered than those who have received lower quality communications regarding post-pandemic work.



Representative Quotes (51 comments received):

"Our leaders have asked, and I assume considered, our opinions; however, it often feels like they are doing whatever they want and that's leading to a significant drop in morale."

"The firm has been slow/lacking in creating plans and policies. Discussion of hybrid work has slowly turned to return to work discussion. There is no clear plan and little communication about how/why decisions are being made. Employees are free to reach out, share info and ask questions on a one-on-one basis."

"In the height of the pandemic, firm leaders did a good job checking in with employees, inquiring about well-being, and general communication from the firm was forthright and clear. Regarding the return to the office however, the efforts and planning for this has appeared to be less transparent, and I am uncertain as to how many diverse viewpoints from employees have been solicited."

"The owners of the firm have not yet crafted a return to the office formula. We know that collaboration works best when all staff is in the office, but the entire staff expressed a desire to WFH several days a week. Formulating a plan to accommodate everyone's needs and wants still has yet to be determined."

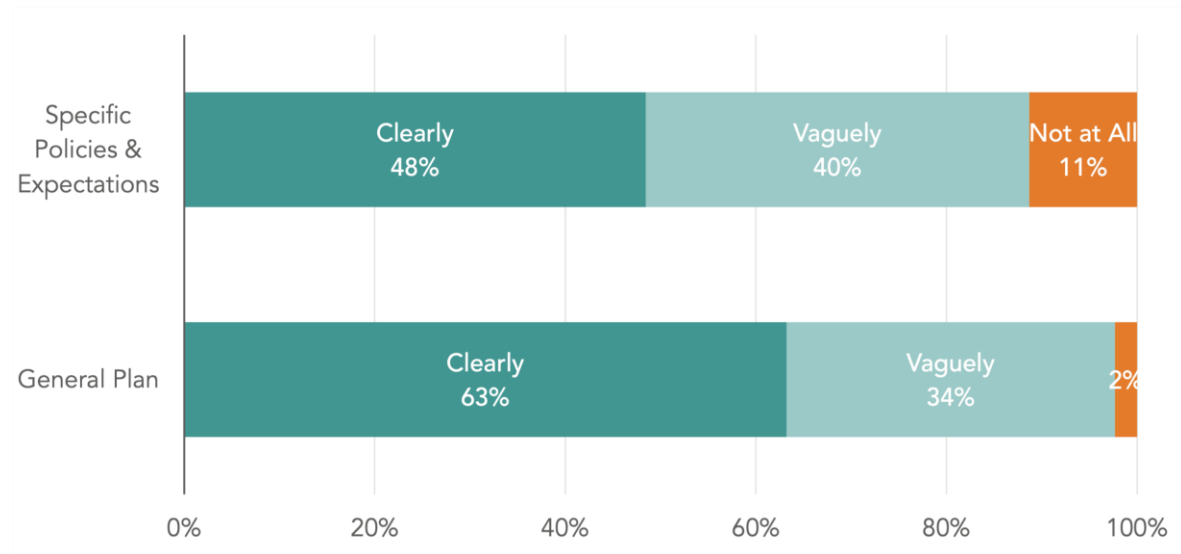
"My firm's leaders have been very understanding of my personal situation. As someone with an autoimmune disease, I have been included in all conversations about policies for when we do go back to work. They have gone the extra mile to make sure that I feel safe in our workplace and have what I need."

HOW HAVE YOUR ORGANIZATION'S LEADERS COMMUNICATED THEIR PLAN FOR POST-COVID 19 WORKING ARRANGEMENTS TO EMPLOYEES?

HOW WELL HAVE YOUR ORGANIZATION'S LEADERS COMMUNICATED POLICIES FOR REMOTE WORK POST-PANDEMIC, INCLUDING EXPECTATIONS REGARDING EMPLOYEE PRODUCTIVITY, EMPLOYER SUPPORT, AND INCLUSION OF EMPLOYEES ACROSS WORK SETTINGS?

Nearly two-thirds of AEC workers believe that their employers have clearly communicated their vision for post-pandemic work, while a third believe that these overall plans have been communicated vaguely. Only a handful (2%) report that overall plans had not been communicated at all as of early July 2021. The quality of detailed communications regarding post-pandemic policies and cultural expectations regarding hybrid work, however, seems to be more mixed: just under half (48%) of respondent's report that specific policies and expectations for work post-pandemic have been communicated clearly, with 41% reporting that communications on specifics have been vague, and 11% reporting no communications on specifics to date.

How well have your organization's leaders communicated their plans for post-pandemic work?



Representative Quotes - General Plan (133 comments received):

"While the timeline and intended vision for the return to the office was clearly presented, there was considerable ambiguity regarding the firm's position on flexible work policies moving forward. Throughout the pandemic, it had been implied that leadership was working on a plan for this, and the return to office announcement would have been a natural place to present this information to staff, however it was conspicuously missing, which left many of my colleagues confused and/or upset."

"Leaders have clearly identified a return to office date but didn't explain why that decision was made. It was previously mentioned that more flexible schedules (some work from home days) may be available. However, one day an email was received saying be back by. I don't understand the rationale or change of heart."

"Monthly all office reports and discussions, and a recent special all office meeting to review our phased office return plan, including breakout discussion sessions."

"They have communicated as best as they could, but due to the uncertainty of the situation I felt it was very vague. Our return to the office date has been communicated well in advance, but what that looks like is unclear."

"Basically, every other staff meeting they say that they don't know yet or until further notice regarding working in the office. I noticed they tell us one thing (that it's fine to work from home [on certain days]), but behind closed doors and to select members of staff, it is clearly communicated that those who take those remote workdays will be frowned upon."

Specific Policies and Expectations (113 comments received):

"The emphasis has been on getting people back into the office, less on how to support employees who work remotely in the future. Beyond communicating how many days we're expected to be in the office per week, nothing."

"It's complicated. They tell us one thing (that it's fine to take our work from home days), but in leadership meetings it's communicated they actually want everyone to be in every single day. I wish they're express how they felt instead of telling us what they think we want to hear, but then feeling upset if anyone actually works from home."

"The policy is pretty clear but it's unclear how an employee's decision about which post-pandemic work option they choose will impact their perceived quality of work, perceived commitment, and real career opportunities."

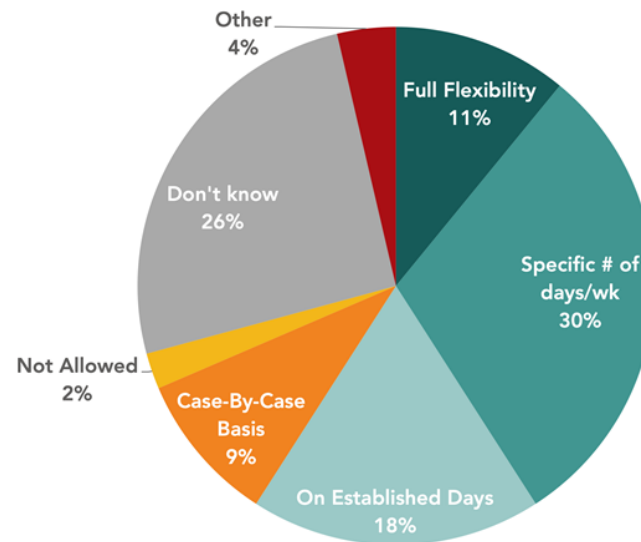
"The policy regarding post pandemic remote work is being finalized so they have made it very clear that this is an evolving process that depends on our honesty and open communication. They have asked us to evaluate what would work best for us, but also what would be our best contribution to the firm. I respect this approach."

"We started the process one year ago and it has been tabled ever since. With our return slated for mid-September the clock is ticking and employees are getting anxious!"

WHICH OF THE FOLLOWING MOST CLOSELY REFLECTS YOUR ORGANIZATION'S POLICY REGARDING POST-PANDEMIC WORK LOCATION?

Most AEC professionals indicate that some form of hybrid work will be allowed in their firms going forward, although policy specifics vary. The most common policies are "employees will be expected to be in the office a certain number of days per week with ability to determine which days they work from the office" (30%) and "clearly established days when employees will be expected to be in office, with ability to be in-office, with ability to work remotely on other days" (18%). Representing the fullest embrace of hybrid work, 1 in 10 professionals report that they will be offered full flexibility, including the ability to work remotely full-time if they choose to do so. Meanwhile, an outright rejection of remote work is extremely rare: just 2% of professionals report that they work in a firm where remote work will not be allowed after the pandemic.

Against this backdrop of rapid industry-wide change in working arrangements, 1 in 4 professionals reports that their firm's leaders have yet to determine or communicate a post-pandemic policy. Firm leaders who have yet to share policies with their employees may face particular challenges. Individuals who work in firms where policy has yet to be communicated are less satisfied with the quality of communications regarding post-pandemic work. They are also less likely to wish to return to their offices full-time and more likely to say that they will leave their jobs within the next year if their preferred working arrangements aren't supported.

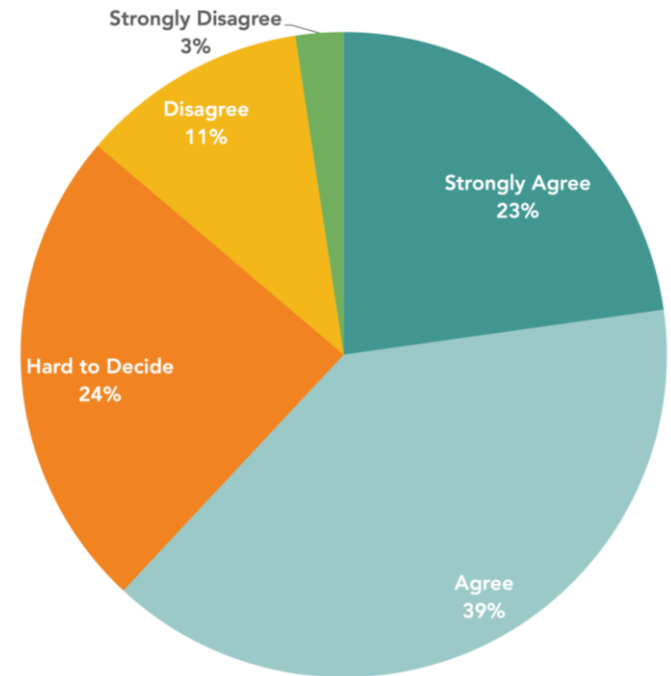


MY ORGANIZATION'S LEADERS WOULD PREFER THAT ALL EMPLOYEES RETURN TO THE OFFICE FULL-TIME WHEN IT IS SAFE TO DO SO.

While the majority of professionals report that their firms will be allowing some amount of remote work going forward, there is also a widespread belief that their firm's leaders are adopting remote work policies reluctantly: 6 in 10 agree or strongly agree that their organization's leaders would prefer that all employees return to the office full-time when it is safe to do so. Because leaders' messages regarding expected behaviors – both explicit and implicit – have outsized impacts on firm culture, the implications of this disconnect between stated policy and perceptions regarding leaders' preferred employee behaviors is worth considering carefully.

It may be especially important for firms currently working to advance justice, equity, diversity and inclusion to explore and seek to close this gap between policy and cultural expectation. Members of groups that, either because of position or experience level or by virtue of personal identity, have traditionally held the least power within AEC organizations are more likely to report that their firm's leaders would prefer that they return to office full-time, regardless of stated policy. Women, BIPOC professionals and staff are all significantly more likely than their counterparts to believe that their firms' leaders would prefer that they return to the office full-time.

A firm's policies, of course, send a strong message to employees about their employer's preferences. Those whose firms have offered the most customizable remote work policies are least likely to believe that their firms' leaders wish for all staff to return full-time. Conversely, those whose firms have offered the most restrictive policies most likely to believe that their employers want them in-office. It's worth noting that those who report that no policy has yet been communicated are much less likely to believe that their firm leaders prefer that they work in-office full-time than those who say that their firms will place some restrictions on remote work. In this case, delaying communication about forthcoming policies and expectations may be creating the impression that remote work will be supported indefinitely.



Representative Quotes - General Plan (151 comments received):

"We did an anonymous survey of employees, and about 75% said they were happy or extremely happy working from home. But the firm's leadership announced that they expect everyone to come back to the office in the fall full-time anyway."

"Even the wording of the surveys my firm has sent out previously are directly skewed towards to the perceived benefits of in person work. They felt like a trap."

"There has been a lot of discussion about equity, about flexibility, and about acknowledging that one size doesn't fit all when it comes to the way we work. But as the time to return to the office nears, these notions have not developed into any sort of tangible policies. At this time, the only thing that is clear is that we will be in the office during business hours, five days a week."

"We highly value our work together in-person, however we also know our employees have varying needs for flexibility. We want to express that desire to be together, but not negatively impact employees' need for better work/life balance and allow those who need more flexibility to have it (and not have those who need more flexibility feel that it will come at the expense of their career trajectory, etc.)."

"The company has provided flexible options and is being open to working from home part time, but I get the strong sense that it is PREFERRED that people are in the office full time."

"As firm leaders, we are weighing this out regularly, but don't feel we can commit until we start transitioning back to working in the office, which will begin as a hybrid model. (2 days in the office required)."

"It is split. We do have several at the top of leadership that are making team members feel pressured to return and others who are encouraging their team to do what they feel comfortable with."

BUILDING SUCCESSFUL POST-PANDEMIC WORKPLACES

As AEC professionals look ahead to the future, it's clear that the lessons learned from an extended period of remote and hybrid work have increased our workforce's appetite for these types of working arrangements. In the final section of this report, we explore employee preferences for post-pandemic work, including preferred working arrangements and frequency of remote work, considerations driving these preferences, and desired support from employers as firms make the transition to post-pandemic working arrangements.

The information collected from these questions reveals several key trends:

AEC professionals prefer hybrid work: The average AEC professional would prefer to work from home 2 days per week. Meanwhile, only 1 in 3 AEC professionals report that they wish to return to their offices full-time when it is safe to do so.

Employers who offer flexibility could boost recruitment and retention: Employees who wish for hybrid work arrangements are more likely to be willing to leave their jobs than those who wish to return to the office full-time. Only half of AEC workers indicate that they're unlikely to quit their jobs within the next year if their employers don't support their preferred work arrangements.

Shift the conversation from hybrid policy to hybrid culture and logistics. While most individuals report that their firms will allow some remote work going forward, and while most individuals want to work remotely at least some of the time, there are still significant unknowns about what hybrid will look like and how it will be supported. Respondent comments suggest that issues to consider include establishing an equitable and inclusive hybrid culture; collaborating effectively with some team members in-office and some working from elsewhere, or even with employees working asynchronously; leading effective hybrid meetings; establishing and maintaining shared expectations and accountability; and making investments in the spaces, technology, and tools required to support hybrid work.

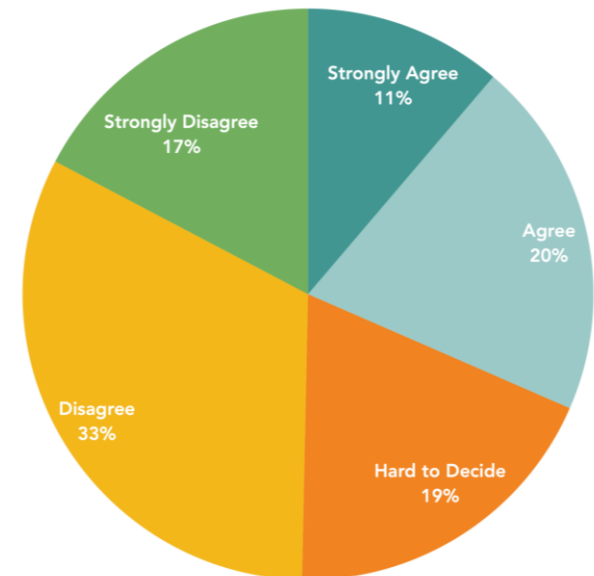
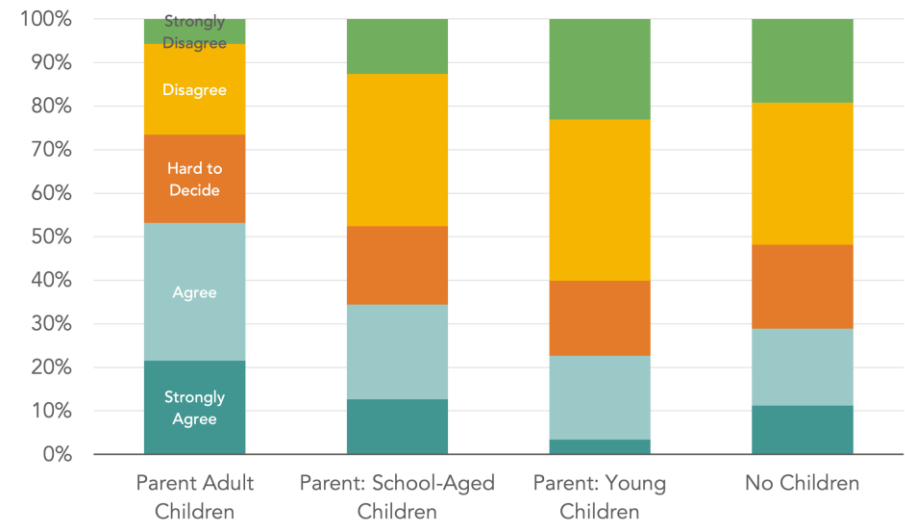
I WOULD LIKE TO RETURN TO THE OFFICE FULL-TIME WHEN IT IS SAFE TO DO SO.

AEC professionals are significantly less likely to say that they would personally like to work from their offices full-time than they are to believe that their employers would like them to do so: just 1 in 3 agrees or strongly agrees that they would like to return to the office full-time when it is safe to do so. Half of respondents, meanwhile, disagree or strongly disagree with this statement.

Experiences of the shift to remote work during the pandemic are strongly correlated with individuals' desires to return to their offices full-time in the long run, with those who say that they experienced productivity gains or decreased work-related stress as a result of remote work are less likely to wish to return to full-time in office work.

Desire to return full-time is also strongly tied to personal identity, parental status, age and seniority. White male professionals, those over age 50 and senior firm leaders are most likely to wish to return full-time. Meanwhile, women, parents of young children, those age 30-39 and mid-level leaders are least likely to wish to return full-time.

Finally, the issue of remote work seems to be more loaded for those who wish for hybrid arrangements than it is for those who wish to work in-person full-time. Individuals' likelihood of planning to leave their jobs if preferred work arrangements aren't supported is inversely correlated with desire to work in-person full-time, i.e., the less likely someone is to wish to work in-office full-time, the more likely they are to be willing to resign if their preferences aren't supported.



Representative Quotes - General Plan (244 comments received):

"While I do enjoy the people I work with and support/manage, I am far more productive at home and save time with my commute. I have found that my team members have developed their problem-solving skills since being at home, as they can't just pop in someone's office or desk. I am seeing that they come to me with potential solutions instead of asking me for the answers."

"Full time is a black/white condition. I would like to return 'nearly full time'. When kids are sick, there is a snow/weather event, I'm not feeling 100% and don't want to risk getting colleagues sick, I do like the ability/freedom/welcoming to work from home when/as needed."

"I think this is dependent on the type of task I'm doing. I enjoy the energy of working in a full office which keeps me motivated, but sometimes I find I am much more productive when I'm able to sit at home where I'm more comfortable and focused."

"Our offices are in some of the most expensive cities in the States. It is unaffordable for jr. staff to live near work, even more so for those with family goals. We are forced to move farther away from the city and risk burnout from the added strain of commuting. I think it would be best to have a more flexible work environment where staff come into the office when needed."

"I am excited to be back in the office, but the flexibility of the WFH period has been a net positive. I think it would be a real shame if we look at all of the ways we've been able to adapt over the past year and decide that it would be best to return to the same things we'd been doing before."

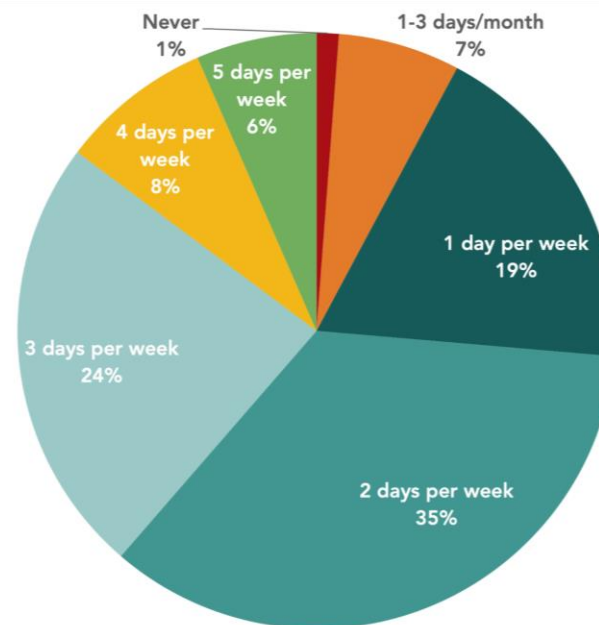
"I never want to work in an office ever again and would choose a firm that allows me to work from home over an in-person office. I would strongly consider leaving a firm that requires me to be in-person."

"Our family-like office culture has always been appreciated by all and I am hopeful that once people start spending more time in the office with their colleagues, that appreciation will be rekindled."

HOW OFTEN WOULD YOU PREFER TO WORK FROM HOME IN THE FUTURE?

While most professionals don't want to work full-time from their offices, they don't want to work fully remotely either: the median frequency with which AEC professionals wish to work remotely is two days per week. Moreover, 78% of respondents indicate that they would prefer to work remotely 1, 2 or 3 days per week for the foreseeable future. Meanwhile, just 1% of professionals say that they never want to work remotely, and 6% indicate that they would like to be fully remote. The vast majority of professionals therefore wish for hybrid, rather than entirely remote or entirely in-office, work arrangements. This suggests a significant shift in our industry's mindsets regarding work, with a preference for flexible, blended solutions replacing the binary distinction between remote and in-office that has dominated conversation throughout much of the pandemic.

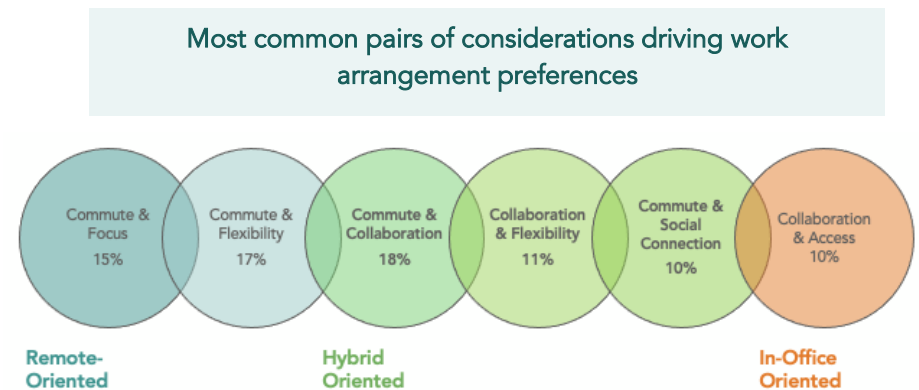
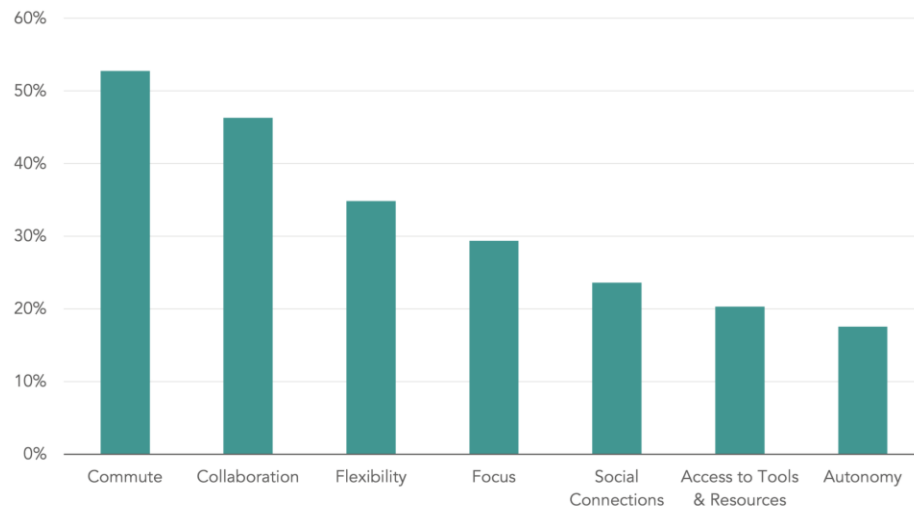
Moreover, the wide range of responses to this question suggest that one-size-fits-all hybrid work policies are unlikely to be equitable in most situations. Female and BIPOC professionals, parents of young children, and those age 30-39 all indicate preferences for more frequent remote work than those of their counterparts. Older white men and senior leaders, meanwhile, report wanting to work remotely the least frequently, on average. As these individuals are more likely than others to be in the position to make decisions regarding hybrid work policy, it's worth remembering that both their individual preferences and their experiences of remote work to date tend to be quite different from those of their colleagues and subordinates!



WHICH OF THE FOLLOWING CONSIDERATIONS IS MOST IMPORTANT IN DETERMINING YOUR PREFERENCES REGARDING REMOTE AND HYBRID WORK?

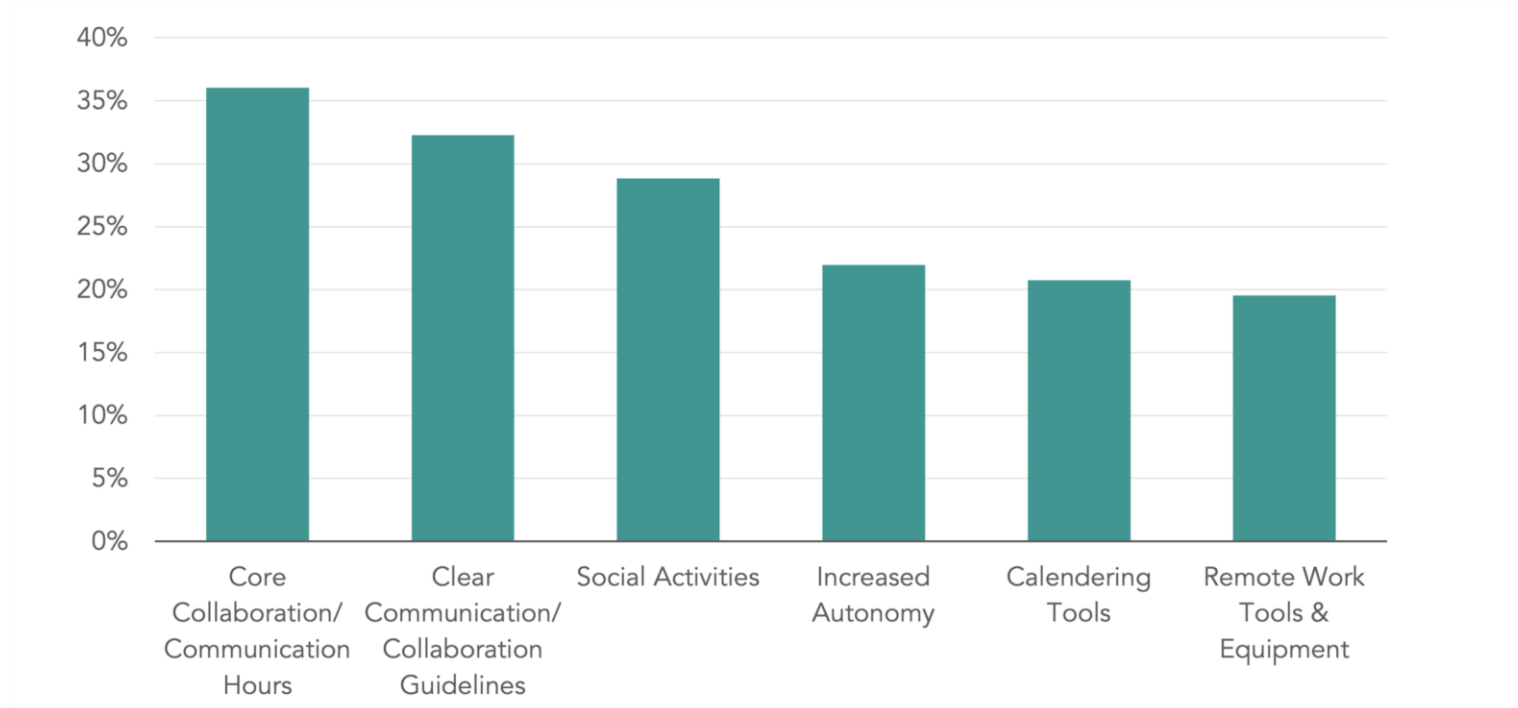
A wide range of considerations drive preferences regarding post-pandemic working arrangements. Overall, the most frequently reported considerations are commute (53% of respondents), collaboration (46%), flexibility (35%), focus (29%), social connection (24%). These considerations vary significantly based on the frequency with which an individual wishes to work remotely, their perceptions regarding their employers' preferences with respect to remote work, and the quality of communications from leaders regarding their firm's plans for post-pandemic work. Professionals' ages, life and professional stages, and personal identities are also strongly correlated with the issues that they say are most important to them personally as they consider post-pandemic working arrangements.

Key considerations associated with preferences for more frequent remote work include expenses associated with in-office work, comfort, autonomy, commute time or energy, flexibility, and ability to focus. Meanwhile, key considerations associated with preferences for more in-office work include learning and access to mentorship, management or ability to be a resource to others, creativity, social connections, collaboration, and access to in-office tools and resources. Most individuals say that they're seeking a balance: that they're simultaneously considering the benefits of remote and hybrid work. In fact, three of the top six pairs of considerations include a combination of pro-office and pro-remote factors.



WHICH TYPES OF EMPLOYER-PROVIDED SUPPORT WOULD BE MOST VALUABLE TO YOU OVER THE NEXT YEAR AS YOU TRANSITION TO POST-PANDEMIC WORK?

Professionals would like to see a range of support from their employers as they make the transition to post-pandemic working arrangements. The most commonly requested supports include clearly established hours for collaboration with scheduling flexibility at other times (36%), clear guidelines regarding communication and collaboration for in-office and remote employees (32%), activities to strengthen social cohesion (29%), increased autonomy (22%), and calendaring tools that indicate where/when colleagues are working (21%).

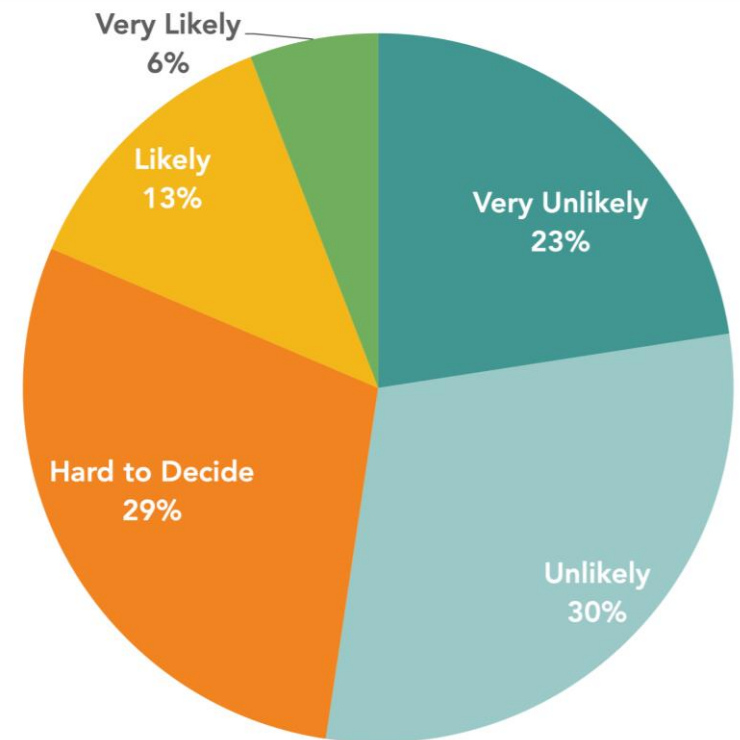


HOW LIKELY ARE YOU TO LEAVE YOUR JOB WITHIN THE NEXT YEAR IF YOUR FIRM DOESN'T SUPPORT YOUR PREFERRED WORK ARRANGEMENT (I.E., REMOTE, HYBRID, OR FULLY IN-OFFICE)?

A significant proportion of the AEC workforce indicates that their preferences for remote, hybrid or full in-office work are strong enough that they are willing to resign from their current positions to ensure that their preferences are met. Industry-wide, only half of professionals indicate that they're unlikely or very unlikely to leave their jobs within the next year if their employer doesn't support their desired working arrangement. Meanwhile, 29% report that it's "hard to decide" and 19% report that they are likely or very likely to leave.

These numbers are even more significant when looking at just those demographic groups that have expressed the most interest in hybrid and remote work: female and BIPOC professionals, as well as young parents and employees under age 40 are significantly more likely than others to say that they will resign if their preferred arrangements aren't supported.

Finally, the data suggests that certain types of remote work policy (or lack thereof) may actually encourage employees to consider resignation. Those who work in firms where remote work will not be allowed, those who work in firms where policy hasn't been made clear, and those who work in firms where remote work will only be allowed on specified days are significantly more willing to leave their jobs due to dissatisfaction with their post-pandemic working arrangement. The data also shows that individuals who prefer remote and hybrid work are much more likely than those who prefer fully in-office work to be willing to leave their employer to ensure that they can adopt their preferred working arrangements. Taken together, these findings suggest that those employers who adopt *and* support more flexible hybrid work arrangements may be quite competitive, drawing new hires away from firms where hybridity hasn't been adopted.



Representative Quotes - General Plan (45 comments received):

"I don't think I could work in a firm that is fully remote. If a firm chose to go completely back to pre-COVID protocols, I would question the leadership's ability to be strategic. So, to me, some form of hybridity is the only answer."

"My firm is supporting my preferred work arrangement, so I'm not likely to leave."

"I want a mode of working that makes the most sense to do the best work we can do as a firm. I support whatever it takes to make that happen."

"I do hope that my work can develop clearer communication regarding what my options are should I chose not to be vaccinated. If I am forced into a situation where I am ostracized because of my personal decisions, then I may consider looking for work elsewhere."

"If we go back to 5-days a week in the office and having to provide a significant reason for needing to work from home, like it was pre-COVID, I will begin to explore other options."

"Leaving my job would never be solely based on these issues. There would have to be other issues not discussed in this survey as a basis with these issues as a tipping point."

"I think we cannot yet predict whether there will be another lockdown at some point due to new Covid variants. We already see cases rising again in almost fully vaccinated countries. I cannot provide an answer to this question until we are sure that there is no relapse of the situation. The priority for now is to feel safe."

WHAT ARE THE GREATEST CHALLENGES THAT YOU ANTICIPATE AS YOU AND YOUR COLLEAGUES RETURN TO THE OFFICE?

Professionals anticipate a range of challenges as they return to their offices. While some of these anticipated challenges are logistical or technical in nature, many professionals are concerned about the broader cultural, work-life, and health implications of returning to their office. The most commonly cited challenges can be categorized as follows:

Navigating Hybridity (403 responses, 31% of respondents): How will firms cultivate hybrid work cultures, establishing expected norms and behaviors for communication, collaboration and coordination within hybrid teams? How will hybrid meetings be facilitated? Will employees who work remotely be treated equitably, or will they be subject to stigma and bias? How will accountability be maintained, and productivity be measured? What spaces, tools and technologies will be required to support remote work? What changes to workflow will be required in a hybrid environment? How will teams coordinate and communicate their schedules to allow for in-office collaboration? Will firm leaders continue to support hybridity in the long run?

Losing Benefits of Remote Work (388 responses, 29% of respondents): Having experienced the benefits of remote work, and having learned to work around some of the challenges, how will AEC professionals respond to being required to return to their offices? How will individuals adjust to spending time and energy commuting, to the loss of work-life and mental health benefits associated with working from home to the loss of comfort associated with remote work, and to the loss of flexibility and autonomy associated with more rigid schedules and greater managerial supervision? How will those who experienced increases in focus and productivity while working remotely adjust to a return to in-office distractions? How will individuals from underrepresented groups experience the return to office environments where code switching (adjusting one's behaviors and appearance to conform to the expected norms of a dominant group) is necessary for advancement and microaggressions are common? Finally, will employees in firms with multiple offices maintain firmwide communication and collaboration patterns, or will individual offices begin to operate independently again?

Maintaining Competitive Employment Practices (195 responses, 15% of respondents): How will firm leaders establish policies that respond to diverse employee needs and preferences and then generate buy-in as those policies are implemented? What is the cost of failing to make decisions, or of unclear or inconsistent communications about those decisions? Ultimately, how will these policies and the change management process impact employee morale and retention?

WHAT ARE THE GREATEST CHALLENGES THAT YOU ANTICIPATE AS YOU AND YOUR COLLEAGUES RETURN TO THE OFFICE? (CONT'D)

Adjusting to the New Normal (189 responses, 14% of respondents): How will individuals and teams adjust to being in their offices or resuming their commutes generally, or to new working arrangements specifically? Will firms continue to learn and evolve during this transitional period? How will firms accommodate the needs of individuals who have trouble following established timelines due to the ongoing absence of reliable childcare or other services that have been disrupted by the ongoing pandemic? How will we support one another's mental health during this time, recognizing that change itself is hard, but that these challenges are compounded by the traumas of a long period of disruption, fear, and uncertainty? Finally, how will individuals use this transitional period to re-establish some of the boundaries between work and life that dissolved with the shift to remote work?

Health & Safety (162 responses, 12% of respondents): How will we ensure that employees feel safe as they return to work, recognizing that there's a broad range of perspectives on masking, social distancing, and the safety of public transit? How will we establish accountability for health in the office, taking responsibility for staying home when sick and engaging in behaviors that make our colleagues feel safe and respected? How will we address the particular safety concerns of those who can't or won't be vaccinated as well as those for whom vaccines are less effective? Similarly, how will we ensure that our colleagues don't bring the virus home to unvaccinated or immunocompromised family members, including children? Finally, are firms equipped to address rapidly evolving public health conditions?

Coming Back Together (66 responses, 5% of respondents): After so much time apart, how will teams rebuild social cohesion? How will new team members be integrated into firm culture? How will individuals who have grown accustomed to working alone face their social anxieties? In firms where bad habits and disruptive behaviors were accepted parts of the culture before the pandemic, how will teams avoid falling into those habits again? And in firms where accountability and trust between leaders, employees and teammates has suffered during the pandemic, how will those ties be reestablished?

Representative Quotes - Navigating Hybridity (403 responses, 31% of respondents):

"I can foresee a clear divide between the people that choose to return full time and those who don't. Knowing my co-workers, this divide won't be an indicator of work types, but staff will be put into buckets on who is and isn't 'available' to work. I can see that becoming a point of tension, and further dividing the staff. I hope I'm wrong."

"I fear the future in-person office work environment will be more male, affluent, single, and white. I fear that the choice/flexibility being offered is important but will result in certain groups (read: poorer, browner, more female) being less visible, with less access to power, client relationships and opportunities for the socialization, chance encounters and mentoring that can come more easily with in-person work. I feel we will turn back the clock on office diversity and in effect create a two-tiered second-class status of employees."

"I think the greatest challenge will be how to find the right balance of feeling included/part of a collaborative work environment, and still keeping the benefits of the work from home independence, if everyone is to be working a hybrid schedule on varying timelines."

"I remain under the impression that a small percentage of my colleagues who are working remotely are actually not working. There seems to be little to no way for anyone to know or (better) assess."

"Tendency to over-react when one 'bad apple' ruins it for the bunch. Meaning, an employee is ineffective when not in the office, therefore everyone has to be in the office."

"Creating guidelines, standards and protocols, and work environments as well as a firm culture that fully embraces and supports working from home, working remotely, and working across multiple offices."

"Synching up for who is in the office on what days. Returning to the office doesn't help my projects if my team members are all remote the days I am in the office and vice versa."

"Virtual meetings in an openwork space. We have had to add sound masking to the space and our office purchased everyone great headphones and computer cameras."

"Integrating hybrid work with clients. When we are all on Zoom, we get to see each other's faces; in a typical (to date) hybrid situation, out of town clients/contractors have one camera at the end of a long table, eliminating the ability for all of us to connect more visibly. It's hard to ask a client to make their situation more conducive by investing in technology when it may not be their top priority to invest in working more effectively with their consultants/design teams."

Representative Quotes - Losing Benefits of Remote Work (388 responses, 29% of respondents):

"A silver lining of the pandemic was being home and having dinner together as a family, where my commute when I am in the office doesn't really support that. I have young children, and the only time I get to see them during the week when I am in the office is for an hour before bedtime. Going back to that after more than a year of having that evening hour together is not easy."

"Our studios have found new unity through the pandemic, and I fear that we will return to our silos if we do not embrace hybrid work more fully moving forward. For those of us who are located in less urban offices, working across studios gives us more diverse teams which is very rewarding and educational."

"Working in an office takes a lot more out of you. With the addition of commute times, effort required to prepare meals, etc. for the day in advance, and socializing with peers - a lot less actual work gets done in the same amount of time as working from home."

"After relocating further from the office to save money. I finally found a fully balanced routine mentally, emotionally, and physically. It will be hard to readjust and rebalance my life to meet the strict 8 to 5 daily routines, plus commuting."

"Despite all efforts to the contrary, there is some hierarchical structure and even some political posturing in place that is much more evident when we are in the office than when working from home. The best thing about working from home for me is just being able to do my job without having to have that as background noise in my work."

"As a transgender employee, working from home was a nice break from some of the microaggressions I experience in the office. I'm not looking forward to experiencing that full time."

Representative Quotes - Maintaining Competitive Employment Practices (195 responses, 15% of respondents):

"I anticipate that if employers do not engage employees in an open and honest dialog that many employees who actually prefer to work remote will feel very pressured to work in the office. This will lead to high turnover and loss of valuable talent to other more adaptable companies."

"My biggest concern is that we will lose good people. I think we'll adjust to coworkers turning on music during client zooms, wasting time commuting, or underperforming staff getting by with things they shouldn't, but what we won't be able to overcome is losing our best, most productive people. People are our product. Everyone is hiring and good people are hard to find. So, without a doubt, my biggest fear is losing my best team members."

"Our principal office is in the highest cost region in the country. House prices have gone up immensely during the pandemic. I am concerned that if we do not permit more flexible working arrangements, including greater willingness to allow employees to be fully remote outside of reasonable driving distance from our offices, we are going to lose people. I also think that setting a rigid bar of only two-days work from home being the desired number, we are going to disengage workers. We need to offer greater flexibility."

"The greatest challenge will be helping staff understand our decision to return to full in office work after being relatively successful with a remote and hybrid schedule through the pandemic. The reality is that the collaboration that occurs in an office setting is so valuable and it is not replaceable even with technology that allows us to be together virtually."

Adjusting to the New Normal (189 responses, 14% of respondents):

"The uncertainty of school reopening and/or the partial reopening makes it hard to plan for my personal return to work."

"Burnout. The pandemic was pretty hard, and we're expected to keep grinding as if we are coming back from a break. Incentives for in-office work, even just a weekly lunch, would be great."

"During the pandemic when we all worked from home, worktime often bled into personal time. I think teams may have some difficulty reverting back to pre-pandemic hours of availability with a more distinct separation of home and work."

"Managing the number of meetings possible in a day. With Zoom you can have five meeting back-to-back. In person or traveling to a client's campus makes this impractical."

Representative Quotes - Health & Safety (162 responses, 12% of respondents):

"Clear communications and enforcement of safety protocols; communications about thresholds for re-instituting remote working requirements (i.e. surge levels, vaccination rates)."

"Concerned with no mask policy in our office while the virus is still spreading as I have a young child who is not eligible to be vaccinated. I'd prefer to return full time to work once my child is vaccinated."

"It has now turned out that one is expected to not wear a mask in the office, and that if you do, you are telling the office that you have not vaccinated (which isn't the case, I'm just being cautious) and given looks. The continued stigma against wearing masks and other previously enforced distancing measure is unsettling."

"Maintaining social distancing and restrictions regarding face coverings. It is counter-productive and annoying to have to interact with people with a barrier or have the barrier obscure vision or impact focus on work."

Representative Quotes - Coming Back Together (66 responses, 5% of respondents):

"Resetting our culture to finally take advantage of a multi-office, multi-practice area organization that is not unduly encumbered by the legacy limitations of singular office-based culture (our distant heritage and long-standing default culture). This is the opportunity to remake how we function, mentor, bond, staff, and grow together as a united firm, not just a collection of offices."

"I fear the challenges of not being able to get back to the sort of full office/team experience that was felt before the pandemic. Majority of colleagues and managers are aiming to work from home more and I feel like that kind of diminishes the office/team/social aspect that is sort of necessary for the younger staff engineers that just started working. I don't mind the flexible aspect of working from home when its needed, but if majority of office is only coming in 1-2 days a week, then it's not the same."

"The culture of our company has largely been wiped away by the employee churn rate through the pandemic, so I don't know how we are going to rebuild it (not the fun social culture, but the real deep relationships, design rigor, and collaboration)."

CONCLUSION

Data collected in this survey makes it clear that AEC professionals have widely embraced hybrid work. Moreover, it demonstrates that members of demographic groups that have traditionally suffered from inequities, injustices, and exclusion within the AEC industry are now most likely to be interested in adopting hybrid arrangements going forward. This represents a significant call to action for our industry's leaders.

However, this survey also makes it clear that AEC professionals perceive a marked disconnect between employers and employees regarding hybrid work. Even though most firms have adopted policies that allow some amount of remote work, most AEC professionals believe that their employers would ultimately prefer that their teams return to full-time in-office work. Part of this perceived disconnect seems to be one of culture: while most professionals' employers have indicated how frequently employees will be allowed to work remotely, relatively few have provided details about how they intend to support individuals who choose to take advantage of those options or how they intend to adjust norms and behaviors to ensure that teams are able to continue to do their best work within a new, hybrid paradigm.

In the absence of a robust change management process, including the establishment of new cultural expectations regarding collaboration, communication, and accountability in a hybrid environment and the development of technical and logistical solutions required to support hybrid work, these new working arrangements may not ultimately be as effective as they could be. Over time, respondents suggested in their comments, suboptimal rollouts of hybrid working arrangements could have real consequences: damaged trust between employers and employees, burnout and other mental health challenges associated with the stresses of suboptimal organizational culture, increased inequity and bias within the workplace, and even decreases in productivity and work quality, and employee engagement.

With the stakes this high, we would encourage leaders who have adopted hybrid arrangements, or are contemplating them, to take the steps necessary to make hybrid work an integral part of organizational culture and to make the transition as seamless as possible:

- **Ask for your team's varied perspectives...then ask again!** Develop ongoing conversations with your staff so that you understand what they believe would make them and their teams most successful at work, as well as their real-time experiences of the transition to your firm's new normal. Knowing that perspectives may vary significantly based on race, gender, parental status, age, and seniority, ensure that you solicit the perspectives of a wide cross-section of employees.
- **Define what success will look like and work together as a leadership team to make post-pandemic work successful.** Set out with the shared intention of making your adopted working arrangement successful, even if there are individual differences of opinion regarding remote, hybrid, and in-office work. The cost of doing otherwise is simply too great! Early on, it will be especially important to provide consistent messaging – both formal and informal – to staff. Over time, it will be equally important to work together to build a culture within each project team and in the studio that's consistent with established policies and shared values.
- **Model the behaviors that you wish to see.** Firm leaders' behaviors send important messages to their teams regarding firm culture. To make hybrid work an integral part of the culture, it's therefore especially important for firm leaders to take advantage of hybrid work options, and to demonstrate desired behaviors and norms for communication and collaboration within hybrid teams.
- **Establish a culture of communication and trust** Successful hybrid cultures tend to be those in which employers and employees maintain transparent lines of communication regarding when and where team members will be working, how work will get done, and accountability for results. In order to foster this transparency, it's equally important to establish trust, ensuring that employees who take advantage of hybrid and flexible work policies feel that they can do so without fear of retribution.
- **Communicate policies and cultural expectations clearly and often.** Don't leave staff wondering what's next! Open lines of communication about the change management process, including not only how often they will be expected to be in the office, but also what they can expect these new working arrangements to look and feel like. Provide ample time for questions, answers, and follow-up. If some details are unresolved, consider sharing this and letting employees know whether you would like their input.

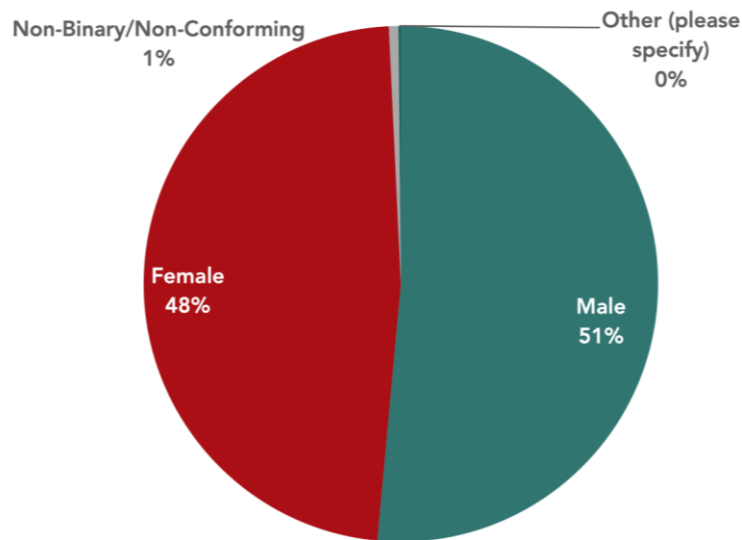
- **Provide the support each employee needs to do their best work.** Ask each member of your team what they need to make new work arrangements successful. While you may not be able to fully accommodate every request, understanding why employees believe that certain supports are necessary and what you can do as an employer to help them do their best work will ultimately help you to make better decisions to support a diverse workforce.
- **Recognize that hybridity requires accountability to be successful.** Help employees to understand that hybridity and flexibility are a two-way street. While these arrangements offer employees significant flexibility and autonomy, they require increased accountability to be successful. Set clear expectations regarding whatever is most important to your firm's success, whether it be collaboration, client satisfaction, quality, innovation, productivity, meeting deadlines, or something else. Once these expectations are set, hold individuals and teams accountable for meeting or exceeding them. Meanwhile, allow individuals and their teams flexibility as they determine how best to get their work done and meet expectations.
- **Prepare for an extended transition period. Change takes time!** Be patient with yourselves and with employees as you all adjust to the new normal. Our industry, like many, is entering a period of transformation. It will take time to adopt the mindsets that will ultimately make hybrid work sustainable and successful. Research has shown that the best way to expedite this transition is by consistently reinforcing desired communication, collaboration, and coordination habits for all members of your team and by establishing systems that reward desired behaviors and outcomes and discourage undesirable ones.

WHO RESPONDED

Overall, 1,335 respondents completed the survey, spending an average of 9 minutes and 38 seconds responding to questions. In addition, a significant number of respondents responded to open-ended questions or elaborated their responses to multiple-choice questions with comments, providing an incredibly rich data set.

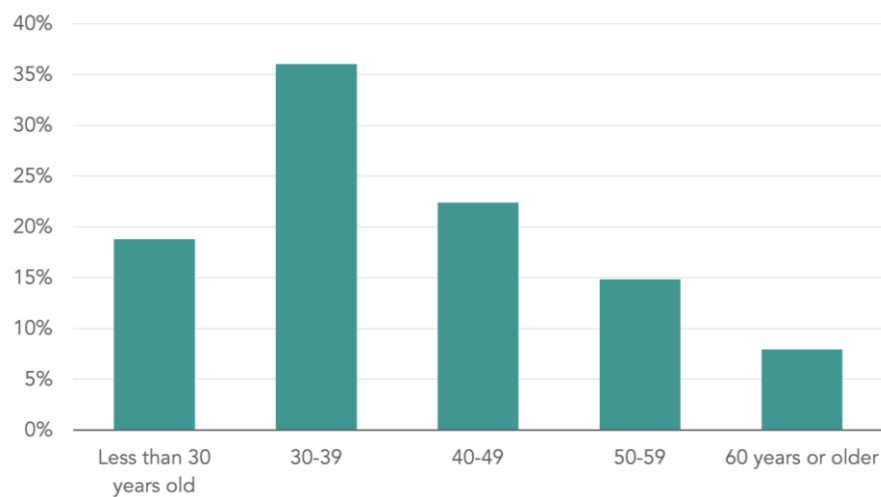
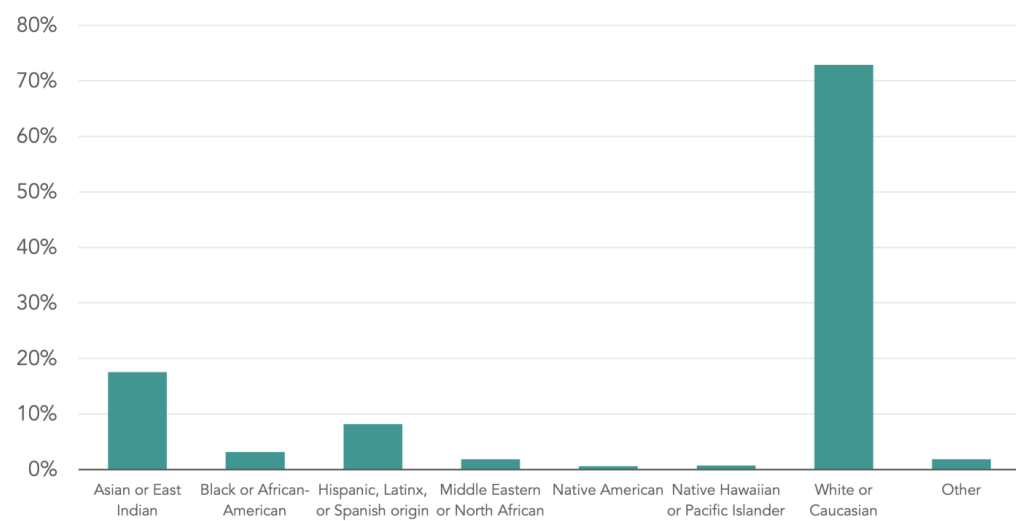
These respondents represent 47 firms of varying sizes and disciplines from across the United States. 31 firms are well-represented, with a minimum of 10 responses coming from across the age and seniority spectrum. This suggests that these firms distributed the survey to their entire staff in accordance with our team's data collection strategy. We are enormously grateful for their participation in this important benchmarking survey. While a variety of firms are represented in the sample, most individual responses tended to come from those working in mid-sized to large firms, with nearly 60% reporting working in firms with 101-300 employees. Similarly, most respondents reported working in firms with multiple offices (64% multiple offices vs. 36% single office). Finally, the survey sample primarily consists of individuals working in single and multidiscipline architecture practices, with 4 out of 5 respondents working in one of these settings. Meanwhile, 16% work in engineering practices, 1% work in landscape practices, 1% work in Interiors practices, and <1% work in construction companies.

Surveyed individuals also represent diversity in terms of gender, race and ethnicity, age, parental status, and seniority.



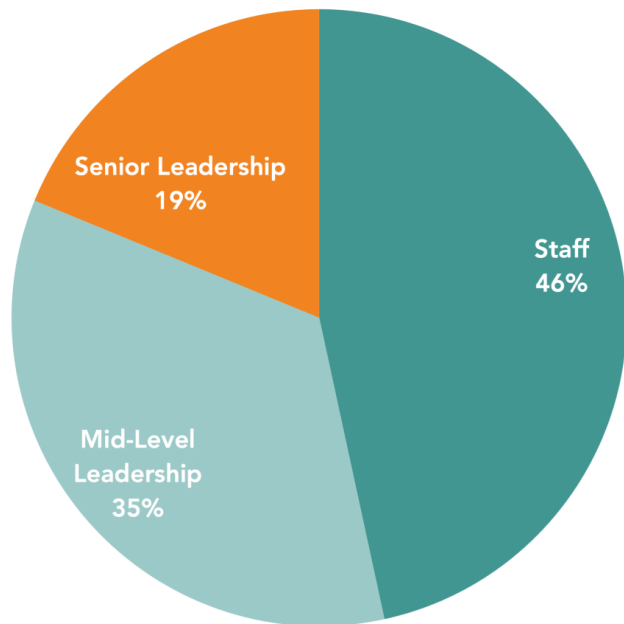
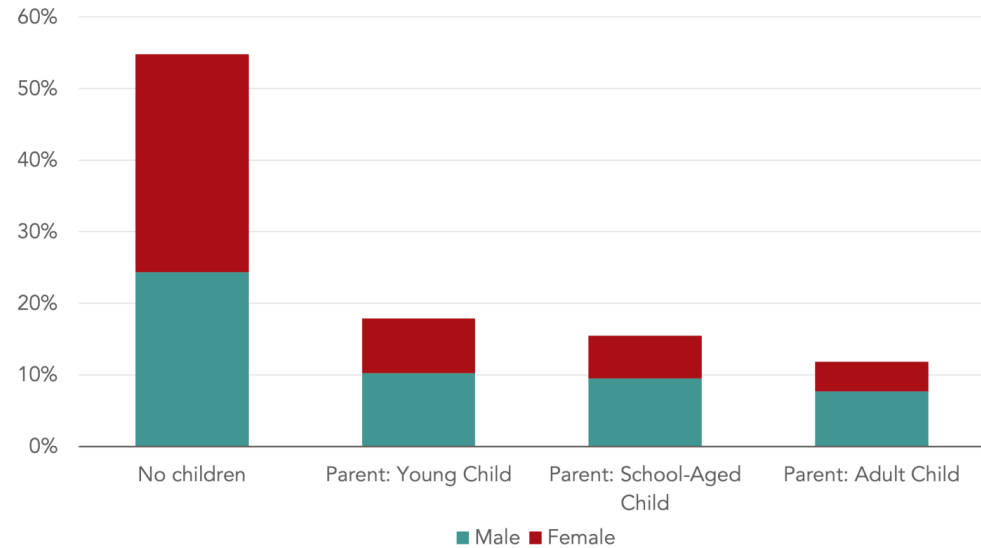
Gender: Respondents were almost evenly divided between men and women, with a small number of non-binary respondents (51% male, 48% female, 1% non-binary).

Race/Ethnicity: The racial demographics of the sample roughly matched those of the architectural profession, with 73% identifying as white, 18% as Asian or East Indian, 8% as Latinx or Hispanic, 3% as Black or African American, 2% as Middle Eastern or North African, 1% as Native Hawaiian or Pacific Islander, and 1% as Native American or Alaskan Native. Numbers add to more than 100% because respondents could select more than one race or ethnicity.



Age: The plurality (36%) of respondents were age 30-39, 19% of respondents were under age 30, 22% were age 40-49, 15% were age 50-59, and 8% were 60 years or older.

Parental Status: Overall, 45% of respondents reported being parents, while 55% did not have children. 17% of respondents had a child under age 5 at home, 15% had a school-aged child at home, and 12% were the parent of an adult child.



Seniority: Nearly half of respondents (46%) were staff-level. Roughly a third (35%) were mid-level leaders. Finally, about 1 in 5 (19%) reported being senior leaders within their firms.

ABOUT CAMERON MACALLISTER GROUP

Cameron MacAllister Group is a trusted advisor to architecture and engineering firms, construction companies, major owners, and professional organizations. Clients include 11 winners of the AIA Firm Award and many other industry honors. We are leaders in the industry, having held senior leadership roles in architecture or engineering firms. Our work includes sustainability consulting; diversity, equity, and inclusion consulting; strategic planning; organizational and leadership development; market intelligence, research, and client feedback surveys; media relations; marketing strategy and client development; practice management assistance; leadership and ownership transitions; professional coaching and training, and counsel in mergers and acquisitions.

Please contact any of us with questions or comments about this study.

Annelise Pitts
pitts@cameronmacallister.com

Saskia Dennis-van Dijl
saskia.dennis@cameronmacallister.com

Mark Cameron
cameron@cameronmacallister.com