Work Environment Survey
2018 Results
What does today’s talent need, want, and expect from their work environment?

The 2018 Capital One Workplace Environment Survey asked 3,500 full-time office professionals, 18 and over, to share their thoughts about the impact of workplace design and employee experience on their satisfaction, creativity and productivity at work. The responses are comprised of

- 1,000 nationwide
- + 2,500 combined designated markets (500 per market)
- 3,500 total responses

In 2017, the survey was limited to only the five designated markets. Comparisons between 2017 and 2018 data refer to the combined media market data.

This survey was supported by Capital One’s Workplace Solutions team, the group dedicated to building dynamic and scalable workplaces for Capital One associates and implementing sustainability initiatives and on-site experiences including health and wellness benefits.
Insights summary

Deliberate Design Remains Crucial to Attraction & Retention
The revolution in workplace design seen in the past decade isn’t just a trend; employees’ views of the current state and overall importance of workplace design is steady year-over-year.

Office Design Drives Productivity & Innovation
Significant majorities of office employees reported that more design-forward workplaces help them to be not only more creative and innovative, but also increase their productivity.

Employees Want Flexible Workplaces & Employers
Today’s workforce wants to work for companies that accommodate all kinds of work styles with flexible workspaces and agile, forward-thinking design.
Key findings
Office design is critical to employees

Most employees (85%) think flexible workplace design is important.

- Very important: 37%
- Somewhat important: 48%
- Not important (net): 15%

Millennials feel even more strongly, with 42% saying workplace design is very important, compared to just 34% of Gen Xers and 32% of Boomers.
Flexible design is essential to create & innovate

79% of employees think **companies need to have an innovative environment** if they want to encourage innovation.

<table>
<thead>
<tr>
<th>Agree strongly</th>
<th>30%</th>
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<tbody>
<tr>
<td>Agree somewhat</td>
<td>49%</td>
</tr>
<tr>
<td>Disagree (net)</td>
<td>21%</td>
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</tbody>
</table>

Nearly 4 in 5 employees agree (79%) that companies cannot encourage innovation unless their workplace environment is innovative.

- Among executive level employees, that rises to 87%, with 42% agreeing strongly, compared to just 77% among non-executive level employees.
How strongly do you agree or disagree with the following statement – I have my best ideas when I’m able to use flexible workspace options.; Regardless of your current office workplace design, how much more or less productive are you when you change your physical location while working?

Flexible design drives productivity & innovation

83% of professionals & 87% of Millennials agree that **flexible workplace design leads to better ideas**

- **Agree strongly**
  - National: 34%
  - Millennials: 43%
- **Agree somewhat**
  - National: 49%
  - Millennials: 45%
- **Disagree (net)**
  - National: 17%
  - Millennials: 13%

80% of employees say they are more productive when they change locations while working

- **Much more productive**
  - National: 26%
- **Somewhat more productive**
  - National: 53%
- **Less productive (net)**
  - National: 21%
Office design: Elements that matter

- **57%** Natural light
- **37%** Easily reconfigurable furniture and spaces
- **36%** Artwork and creative imagery
- **30%** Collaborative spaces
- **25%** Spaces for rest and relaxation
- **25%** Bold colors

Which of the following design elements, if any, would you like to see in your workplace?
### Design is equally or more important than location

32% of employees think **workplace design is more important than workplace location**

<table>
<thead>
<tr>
<th>Importance Level</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Much more important</td>
<td>10%</td>
</tr>
<tr>
<td>Somewhat more important</td>
<td>22%</td>
</tr>
<tr>
<td>Equally important</td>
<td>33%</td>
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<tr>
<td>Less important (net)</td>
<td>34%</td>
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</table>

2 in 3 employees (66%) say that workplace design is as important, or more important, than workplace location.

- **Executive level employees feel even more strongly.** More than 3 in 4 (76%) say workplace design is as, or more, important than workplace location, compared to just 63% of non-executives.
Attracting talent: Meeting expectations

- **Flexible hours**: 58%
- **Ability to work remotely**: 51%
- **Access to the latest devices and technology**: 47%
- **Alternative desks, such as standing desks**: 31%
- **On-site fitness centers**: 30%
- **Online chat system for employee communication**: 27%

Which of the following, if any, do you expect from the next company you work for?
Flexible design is trending up

Most employees (88%) find flexible workplace design to be important, up 3% from 2017.*

- Flexible workplace design is not just an expectation, employees increasingly view it as essential to producing their best work.

- Employees who strongly agree that they have their best ideas when utilizing flexible design is up 3% from 2017.

*Note that this year-over-year data is from the 2,500 aggregate sample size and is not national data. Please see slide 2 for details.

In 2018, 40% find it very important that their workspace is flexible, up 6% from 2017.

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
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<tbody>
<tr>
<td>Very important</td>
<td>34%</td>
<td>40%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>51%</td>
<td>48%</td>
</tr>
<tr>
<td>Not important (net)</td>
<td>15%</td>
<td>12%</td>
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How important is it, if at all, that your company’s workplace design is flexible?: How strongly do you agree or disagree with the following statement – I have my best ideas when I’m able to use flexible workspace options.
The Capital One Workplace Environment Survey was conducted by Wakefield Research among 3,500 adults, 18 and over, in the U.S., including 1,000 office professionals employed full-time in the U.S., and 500 office professionals employed full-time in each of the following DMAs: Chicago, Dallas, New York City, San Francisco and Washington, D.C., between April 19 and May 2, 2018, using an email invitation and an online survey.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. For the interviews conducted in this particular study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 3.1 percentage points for the national sample and 4.4 percentage points for each of the DMAs from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

This survey was supported by Capital One’s Workplace Solutions team, the group dedicated to providing the best work environment for our associates so that they can thrive.

Workplace Solutions implements a Workplace Design Strategy across the company as well as on-site benefits such as health, wellness, and environmentally friendly initiatives.