

The role of wellbeing in a hybrid optimal strategy



Purpose driven



Provide the data and insights
**to help you build better
workplace 'systems'**



Planning for the future

Q1. Which of the following best describes the status of your organisation's post-pandemic workplace strategy?

This heavy-weight question has been a key indicator in each of the previous deployments of the poll. With Covid still casting a long shadow over 2021 and 2022, we were keen to see if opinions were changing as an end to the pandemic phase seemed to be materialising.

Indeed it appears uncertainty is dissipating, with the latest results showing an encouraging fall in the proportion of organisations still at an early stage of planning their strategy. Chart 1 shows that just 29% of respondents indicated they were at this stage, compared to almost 30% in Q3 of 2021.

The proportion of respondents who have not communicated their post-pandemic workplace strategy to their employees has also dropped considerably over the 2 years that the poll has run. From over a third of respondents in Q3 of 2021 to 12% in Q4 of 2022.

It follows, therefore that we see a strong and stable increase in the proportion of organisations who have communicated it to employees, from 36% in Q3 of 2021, to nearly 54% in Q1 of 2022 and now 68% in our latest poll.

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Chart 1
 ■ Q3 2021 responses
 ■ Q1 2022 responses
 ■ Q4 2022 responses

Strategy Status	Q3 2021	Q1 2022	Q4 2022
We have yet to properly assess our future strategy	19%	19%	4%
We are still at an early stage of planning our strategy	29%	30%	16%
We have our strategy in place but we have not yet communicated it to employees	34%	15%	12%
We have our strategy in place and we have communicated it to employees	36%	54%	68%

Leesman Corporate Real Estate Leaders Poll Q4 2022



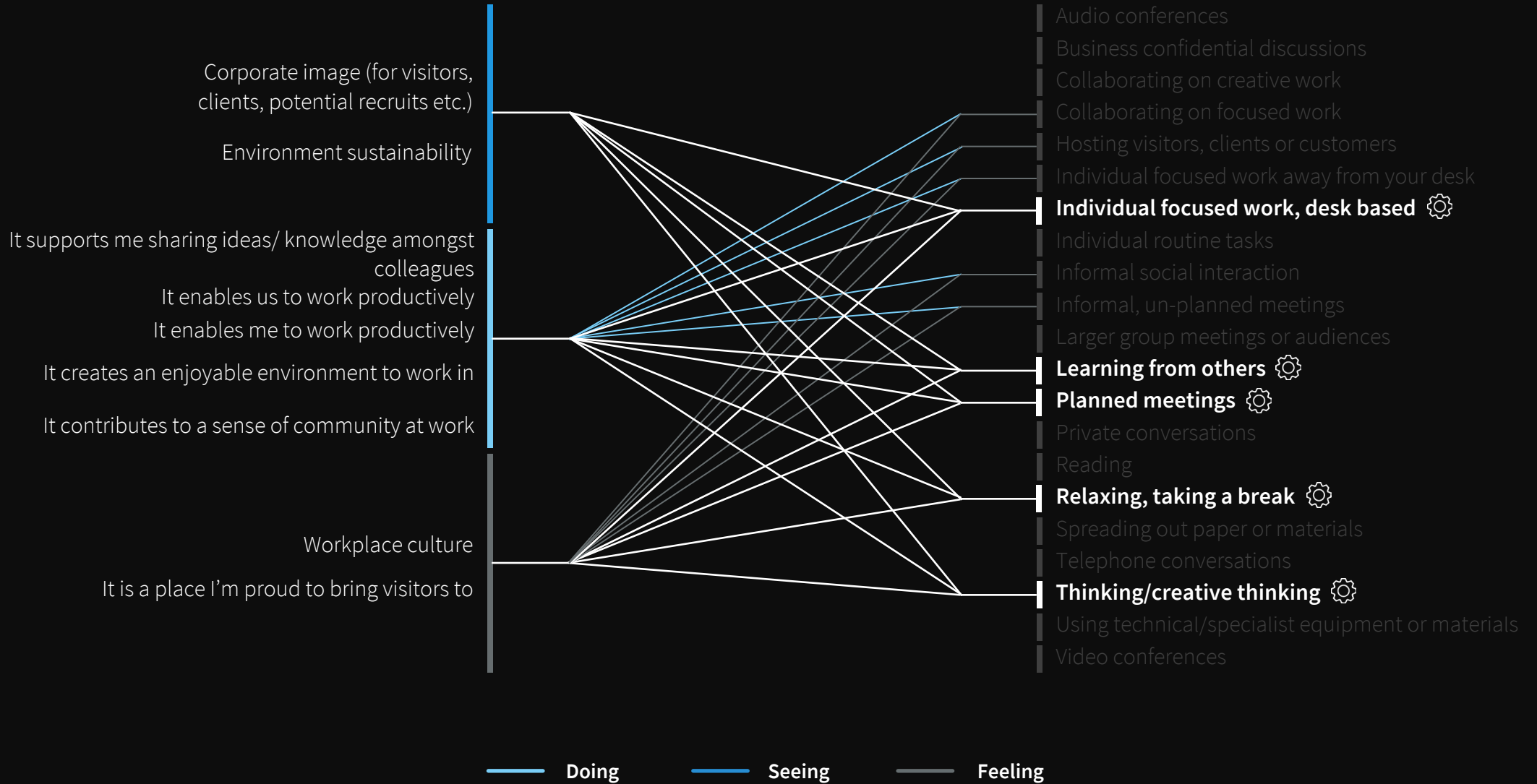


1,083,469

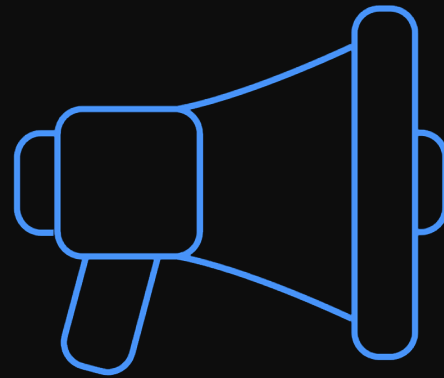
Leesman office
respondents

Key findings from the last 10 years

⚙️ Sentiment super driver



Thirteen statistically proven sentiment super-drivers of workplace experience





342,754

Leesman office
respondents



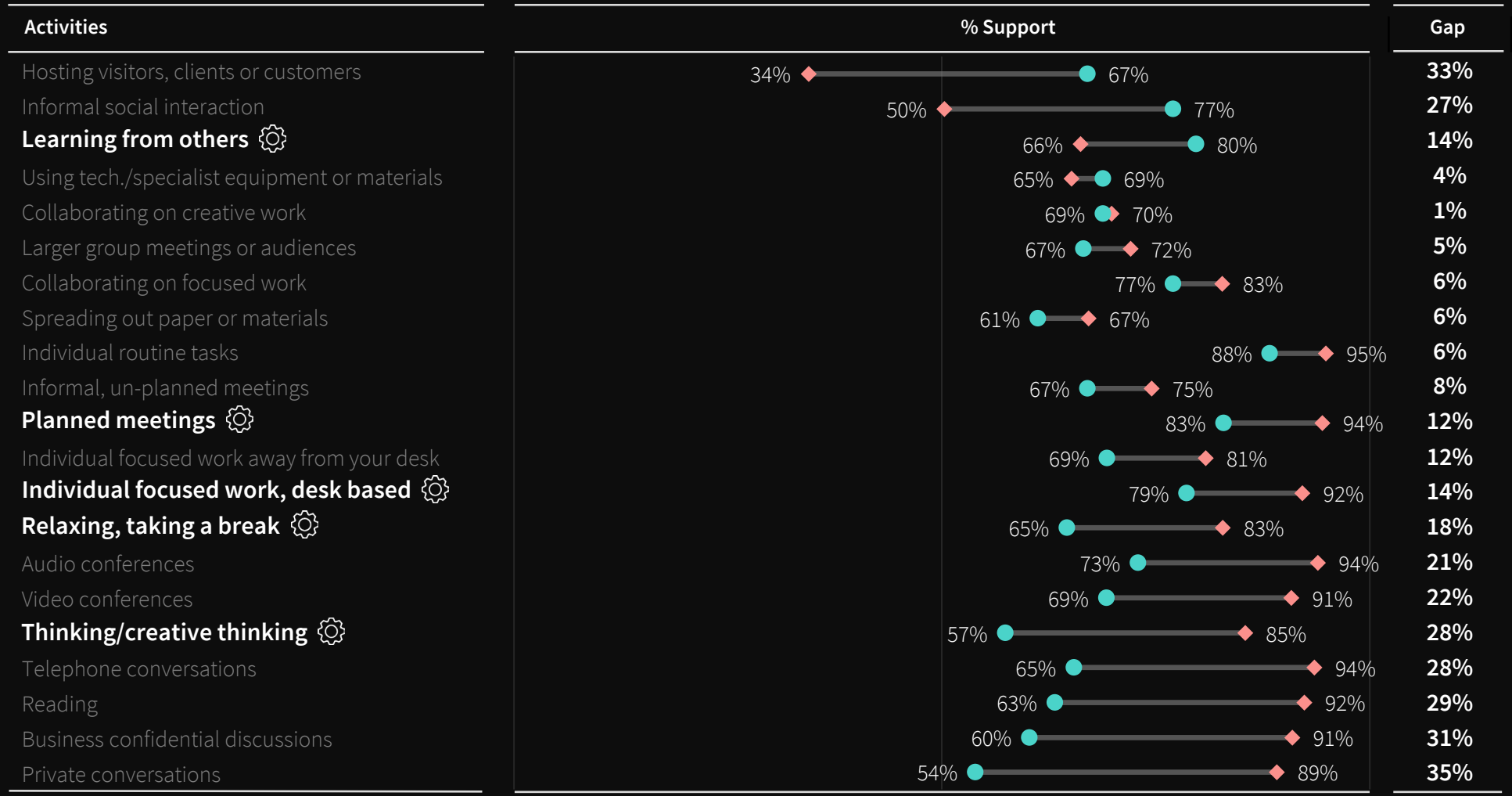
387,265

Leesman home working
respondents

Work activities – office and home

Better at office

Better at home



◆ Global home support ● Global office support ⚙️ Sentiment super driver

Work activities – office and home; purposeful presence



Connection and wellbeing



+58%

It contributes to a sense of
community at work agreement

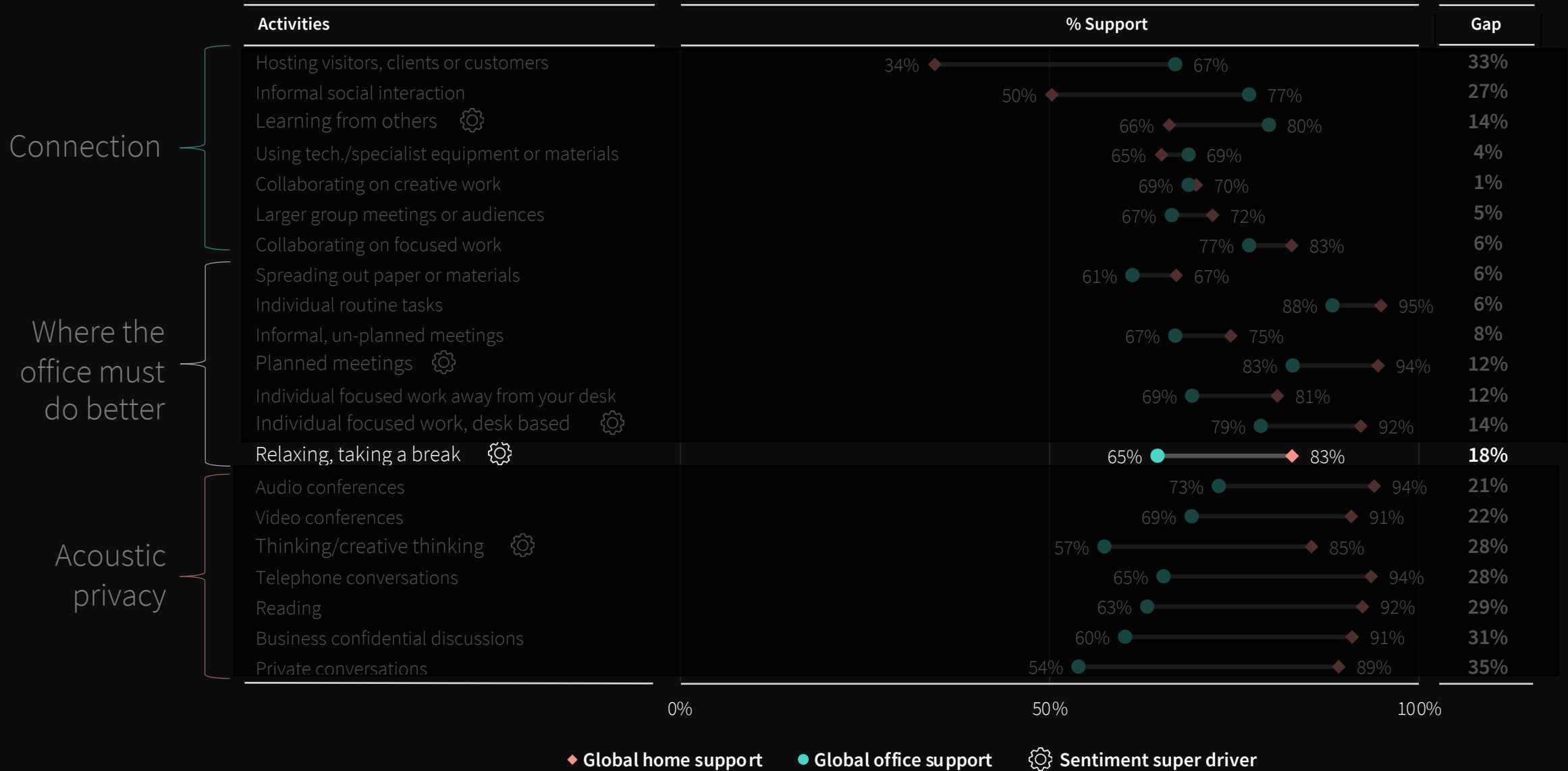


+34%

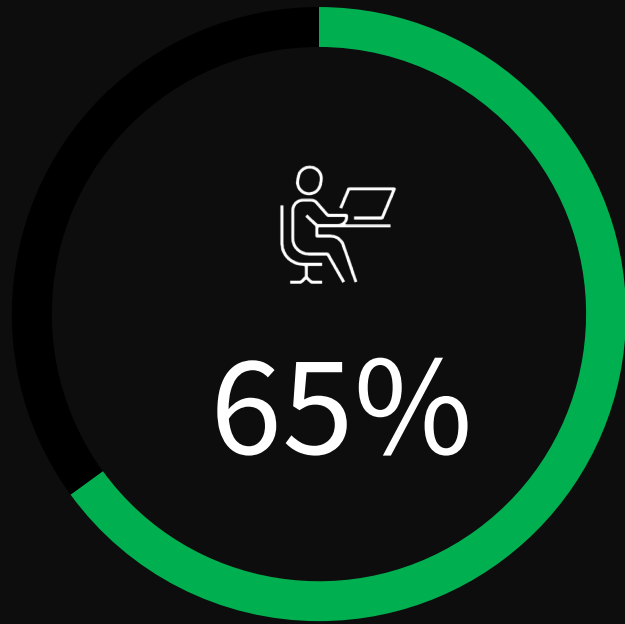
It supports informal
social interaction

“The design of my workplace supports my wellbeing”

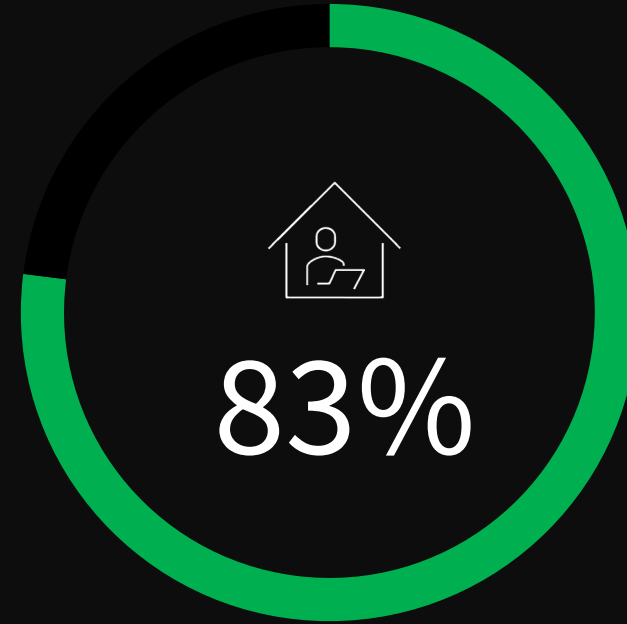
Relaxing / taking a break – Home Vs Office Support



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Office support agreement

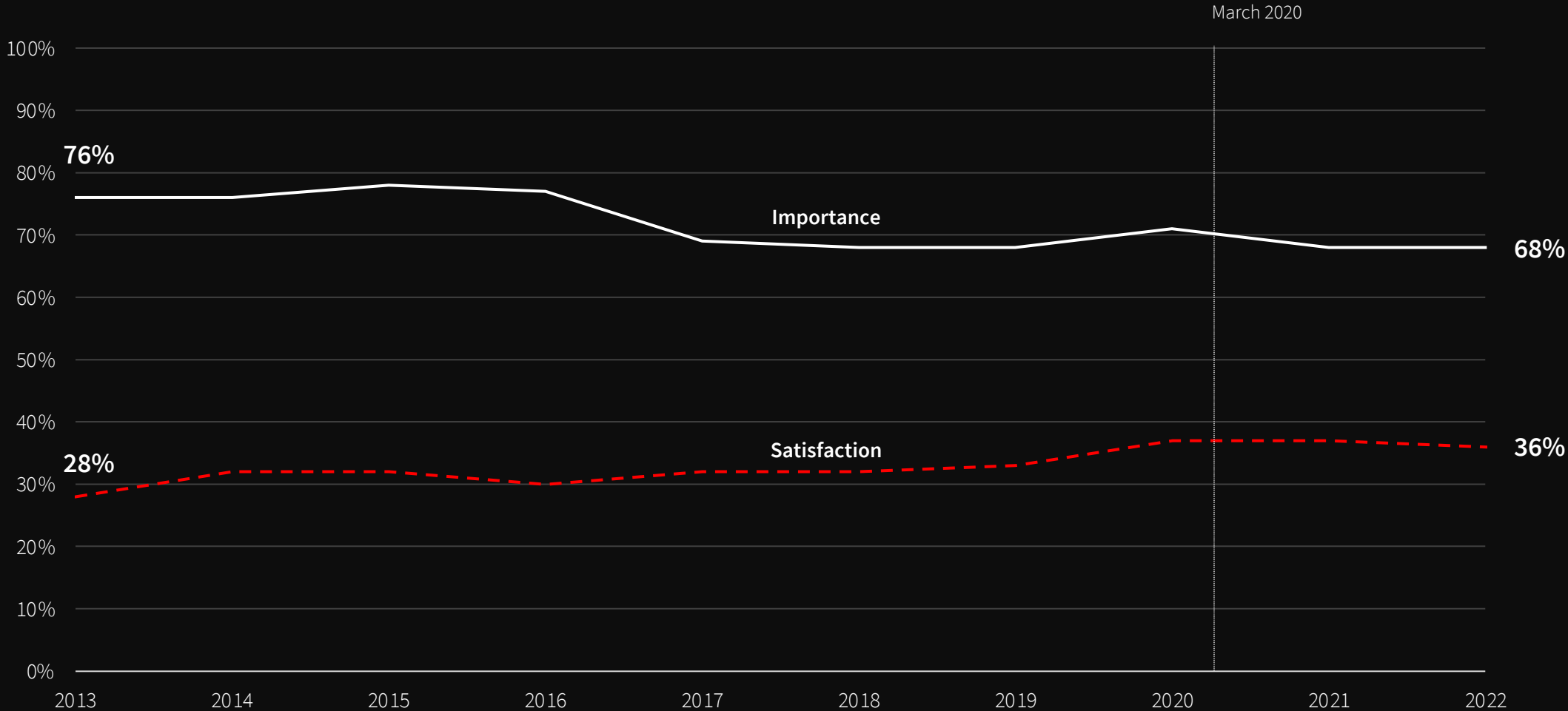


Home support agreement

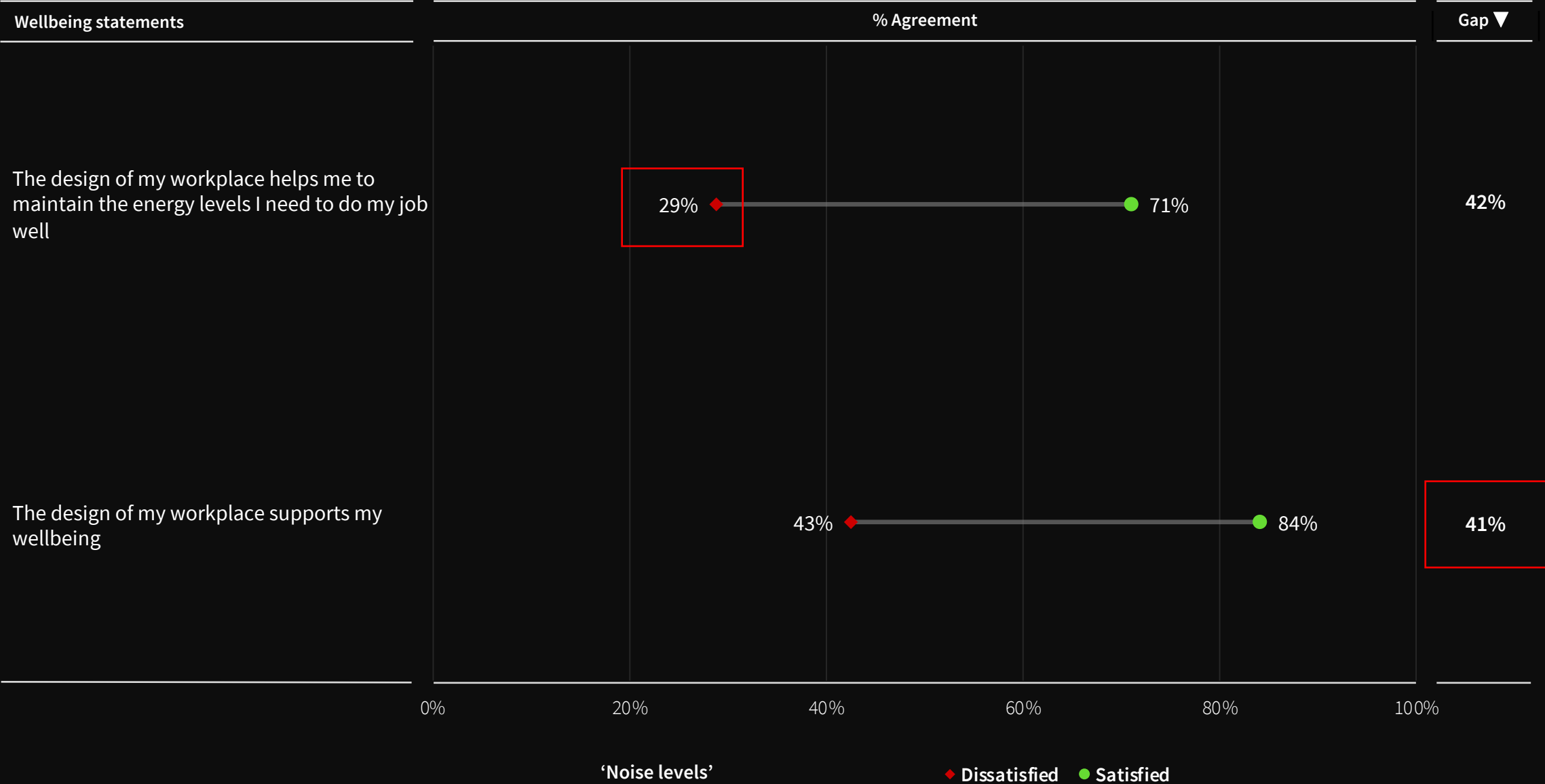
Dissatisfaction with noise levels kills productivity



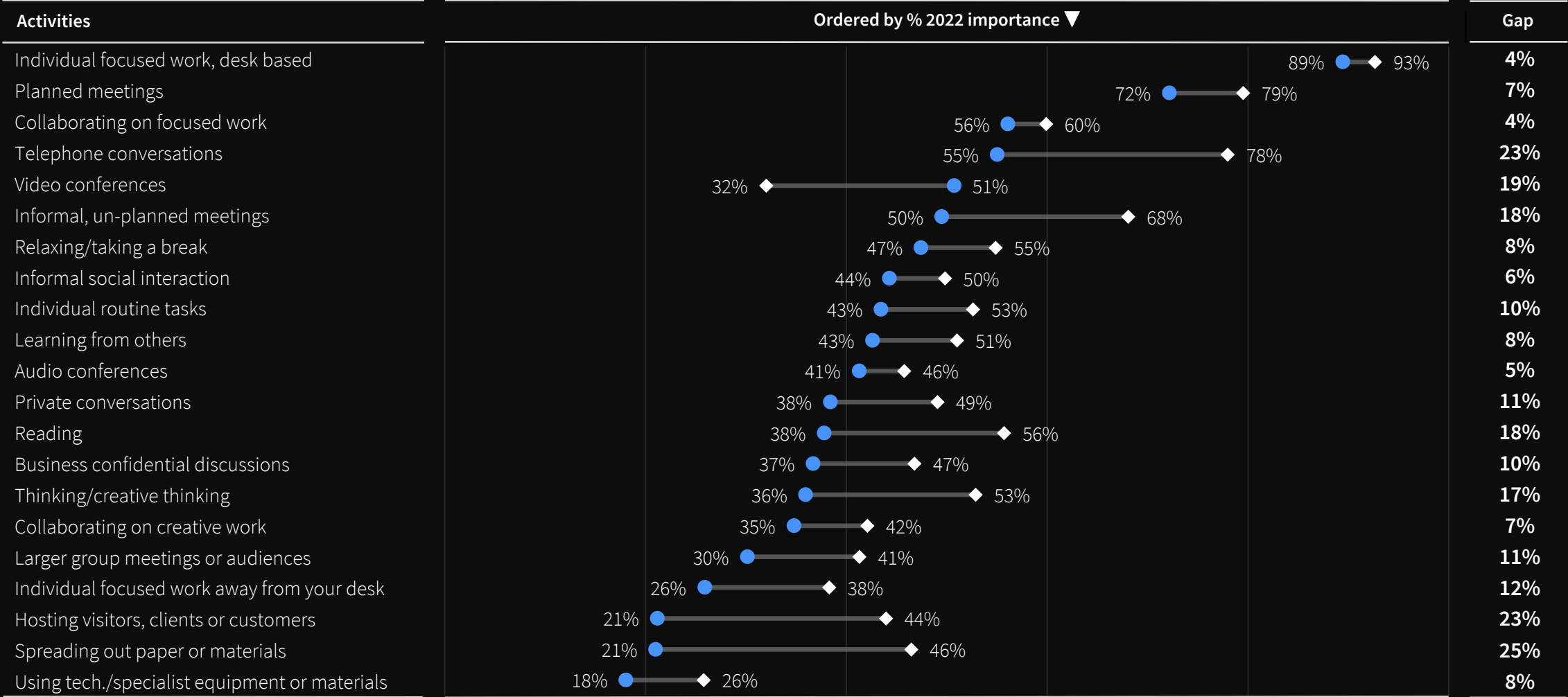
Noise levels – importance / satisfaction



Noise levels impact on wellbeing

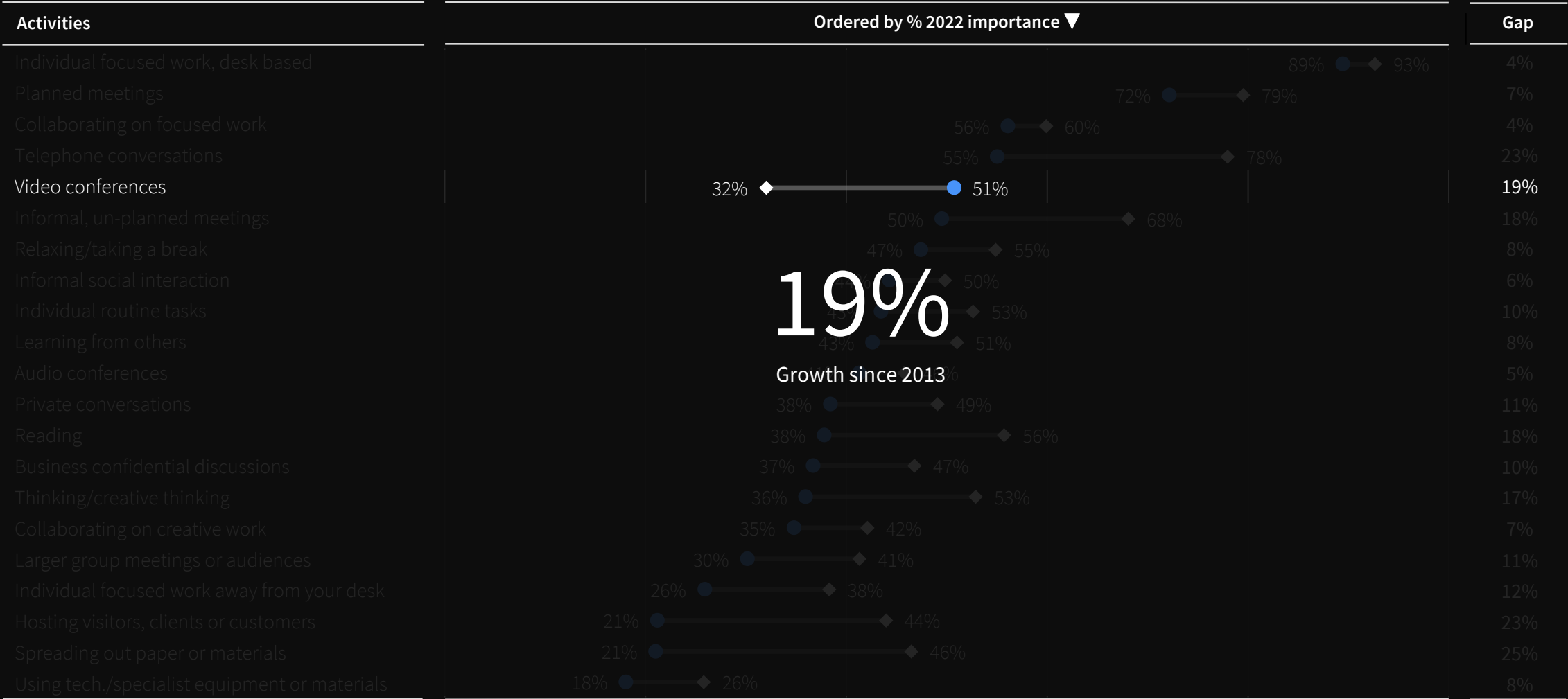


Work activities – change in importance



◆ 2013 ● 2022

Work activities – change in importance



19%

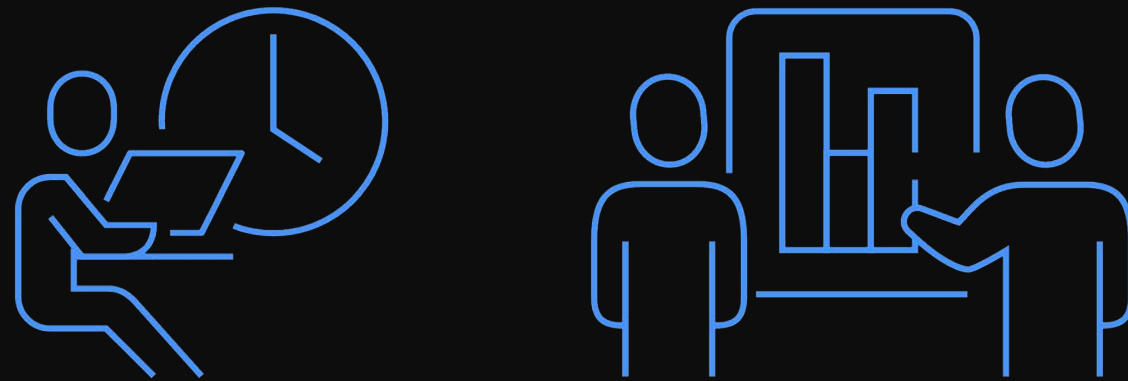
Growth since 2013

◆ 2013 ● 2022

Connection, breaks and noise levels
all impact on wellbeing
It's about balance



Focused work is the foundation of collaborative work



A photograph of three people sitting at a long wooden table in a cafe or office lounge. A man with a beard and a grey beanie sits in the middle, looking at a silver laptop. A woman with a brown beanie sits to his left, facing him. A woman with long blonde hair sits to his right, also looking towards the man. There are bowls of popcorn and glasses on the table. The background features a bar area with plants and string lights.

The undeniable rise of hybrid working

What is hybrid working?

I have choice over...

when
I work

how
I work

where
I work

Flexible

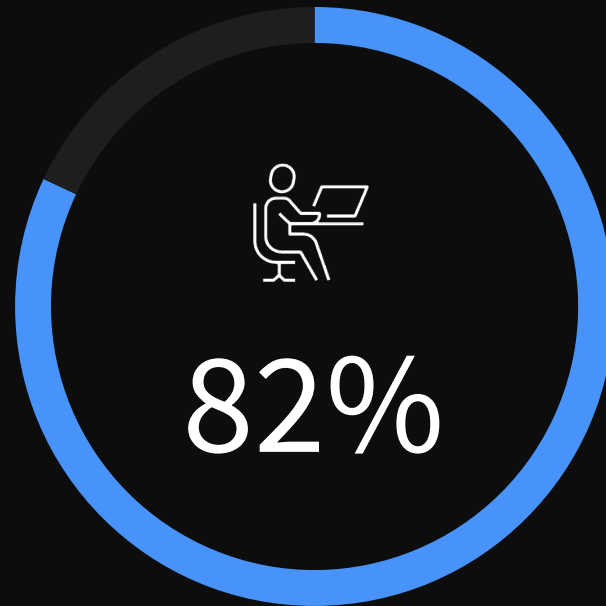
Agile

Hybrid



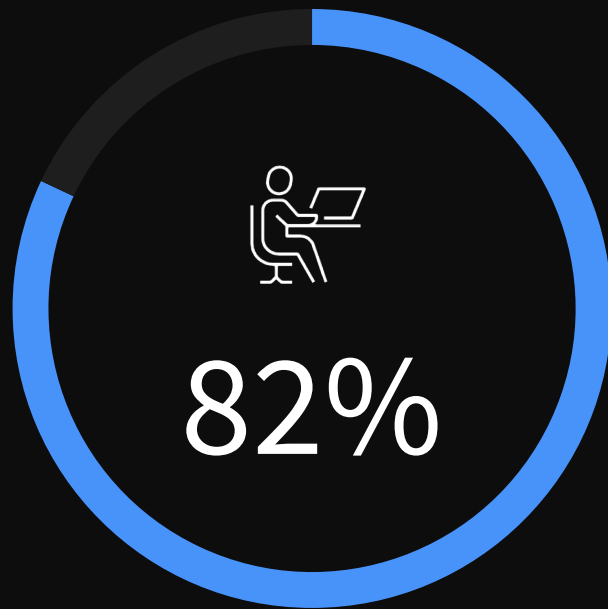
Freedom

I have freedom over

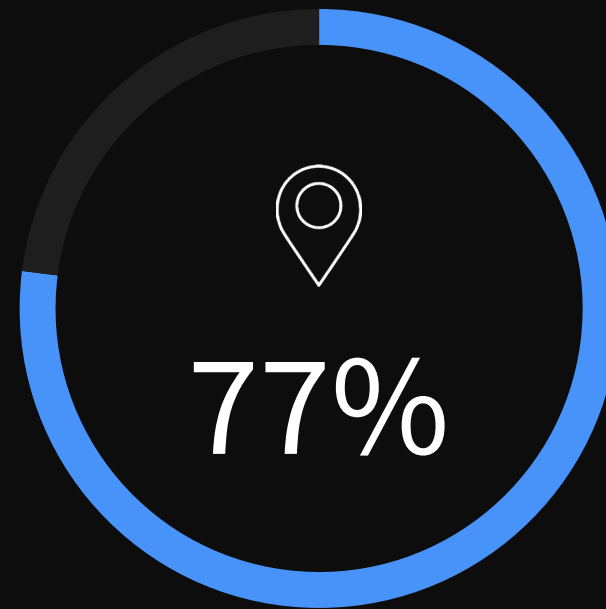


How I do the work
related to my job

I have freedom over

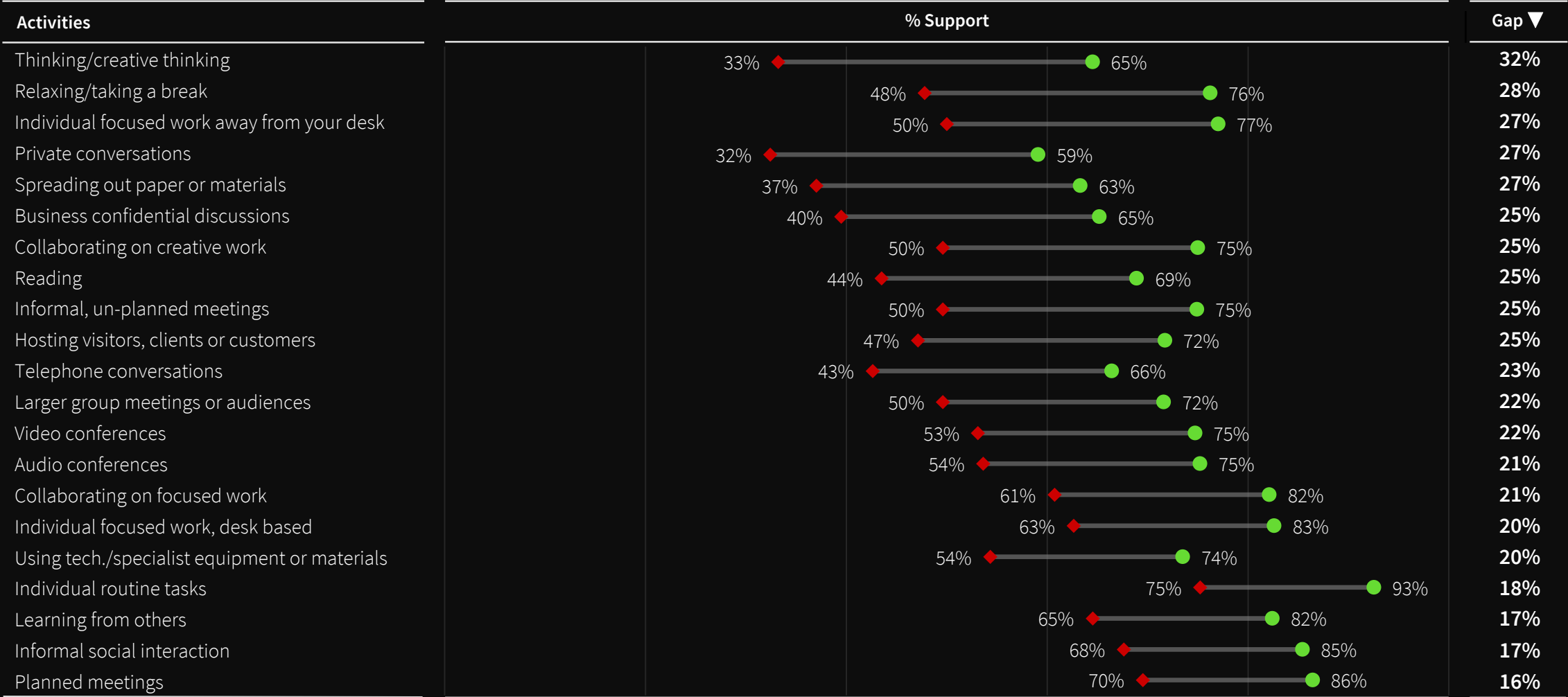


How I do the work related to my job



Where I do the work related to my job

I have freedom over where I do the work related to my job



'I have freedom over where I do the work related to my job' ♦ Disagree ● Agree

Workplace impact – biggest gaps in high freedom vs low freedom



+33%

It creates an enjoyable environment to work in



+31%

It enables **me** to work productively

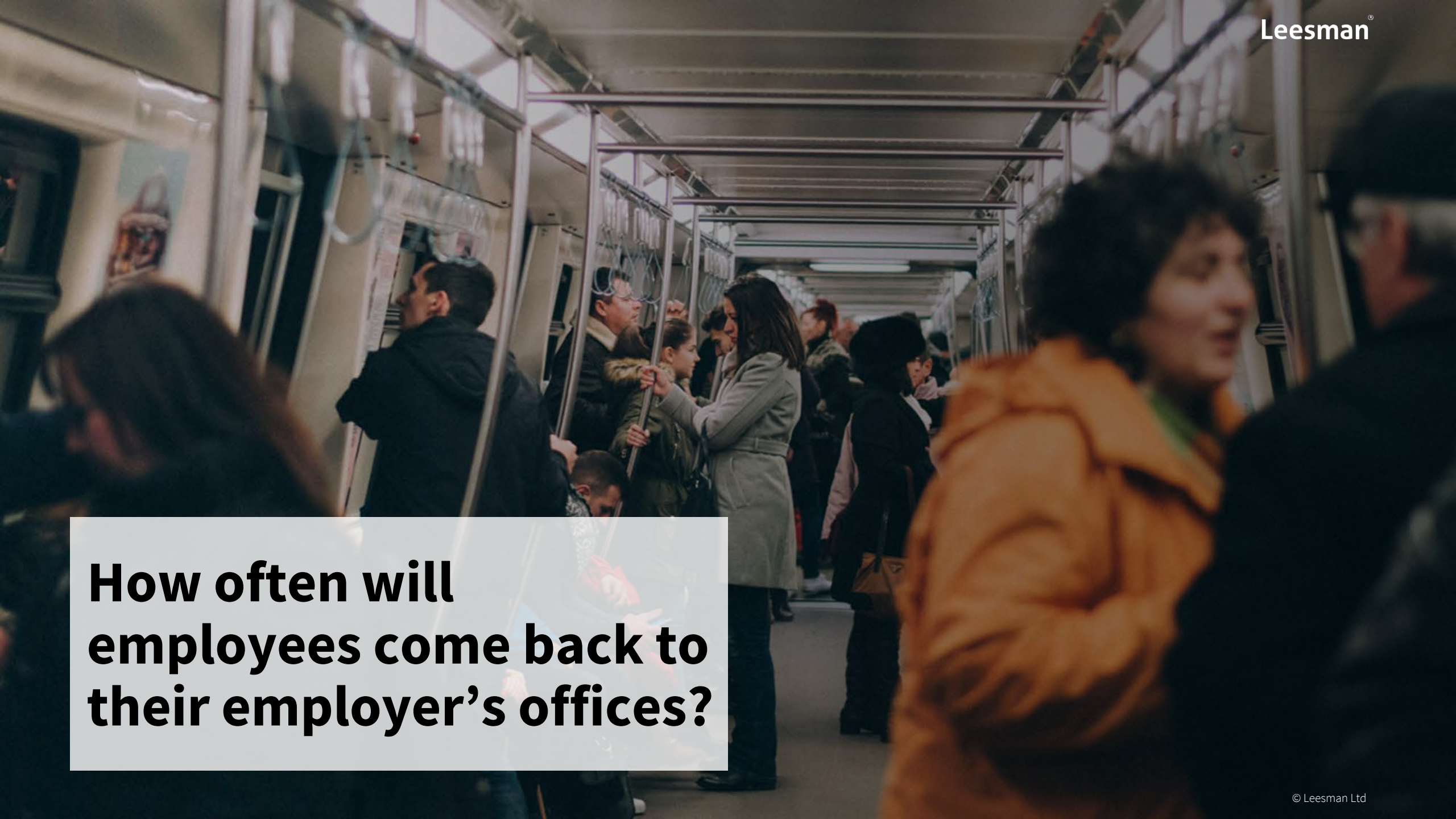


+31%

It enables **us** to work productively

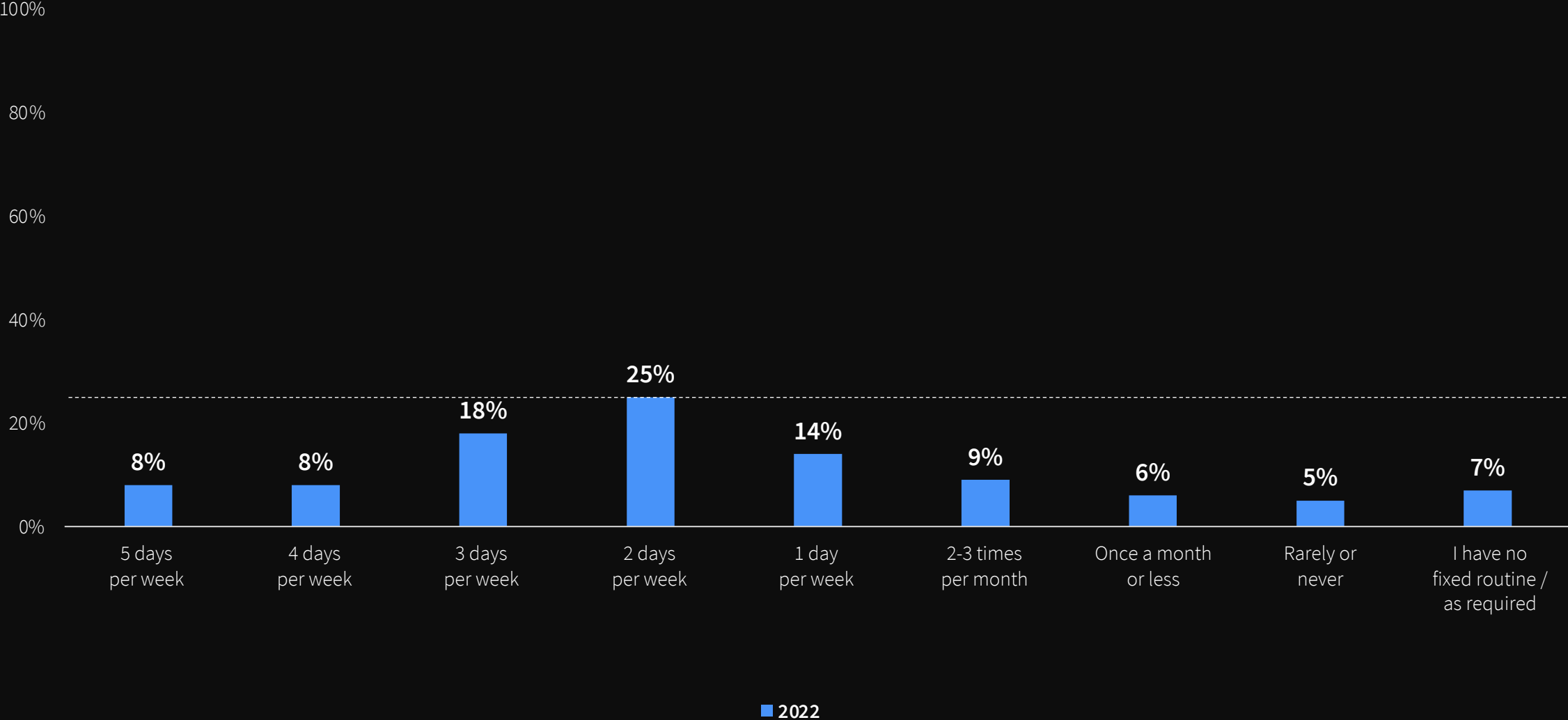
Mandating people back is counter-productive to wellbeing

Magnetise not mandate

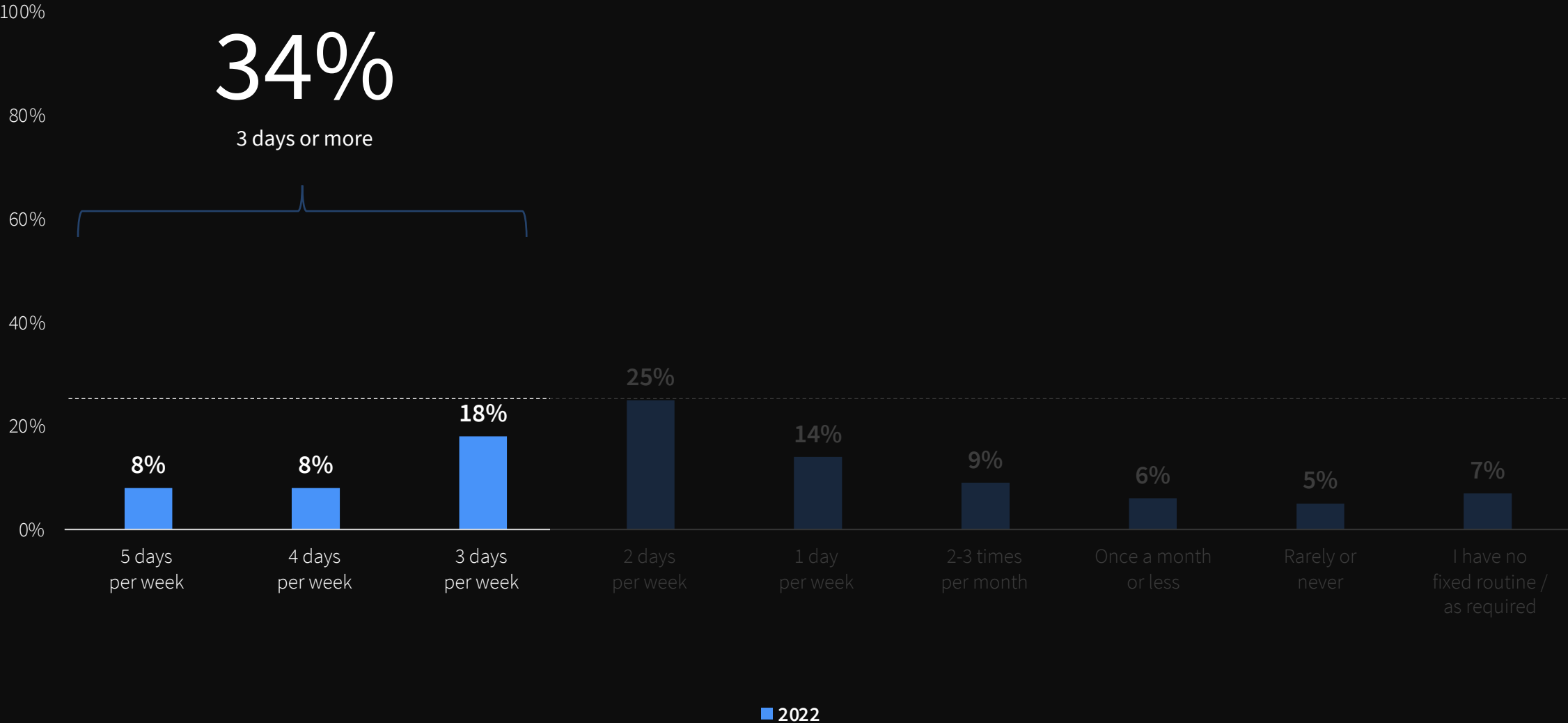
A photograph of a crowded train carriage. Passengers are standing and holding onto vertical poles. The scene is dimly lit, with a focus on the people in the foreground and middle ground. The background shows the interior of the train with overhead luggage racks and more passengers.

**How often will
employees come back to
their employer's offices?**

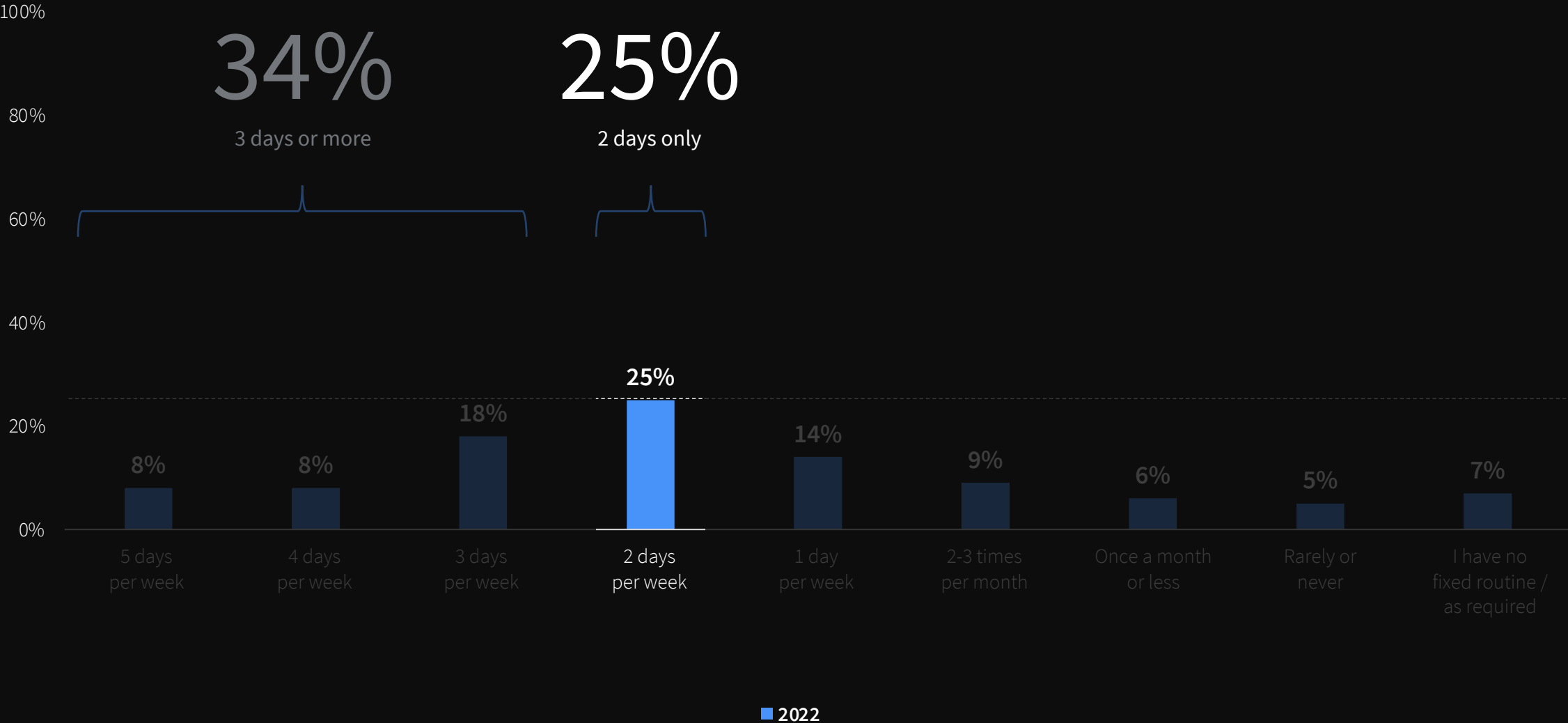
How often are you likely to work in your organisation's workplace?



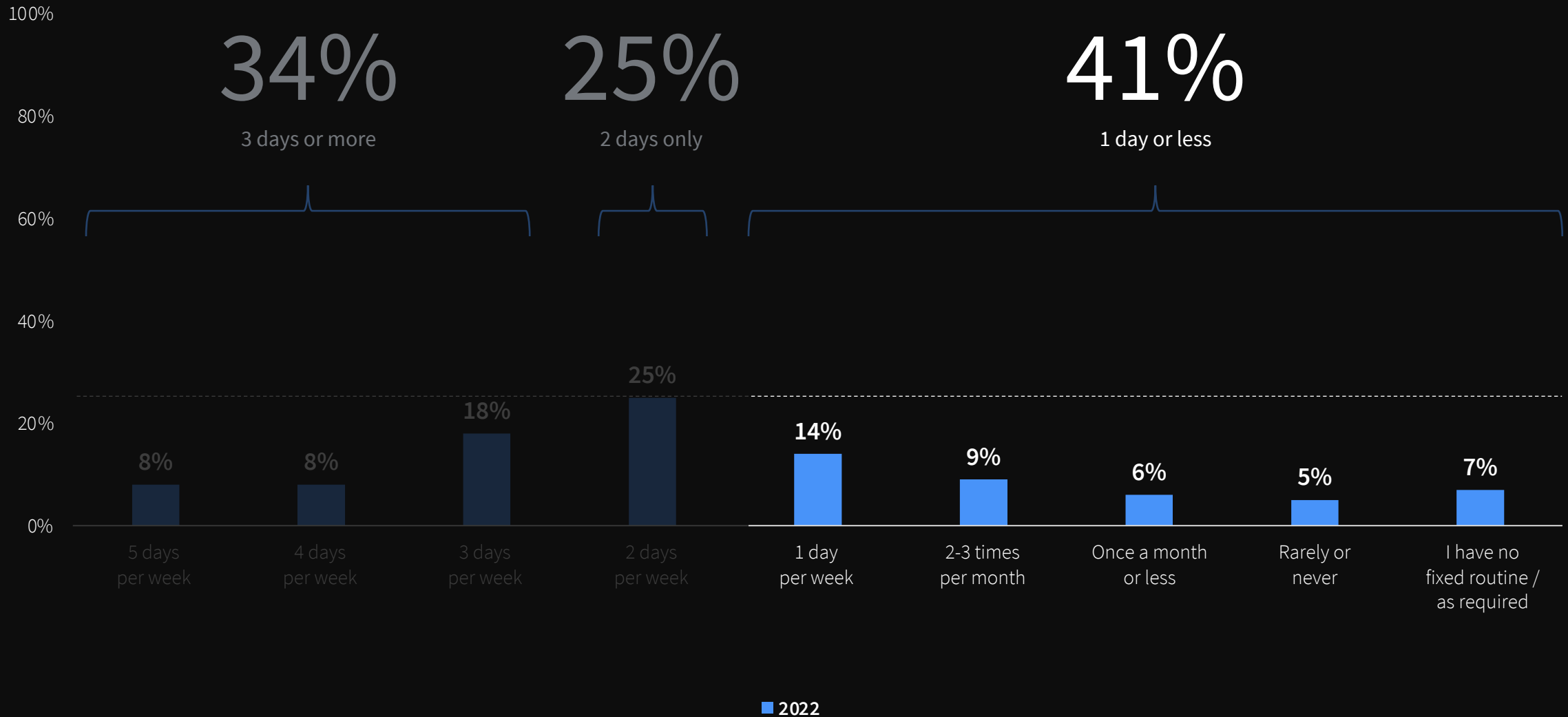
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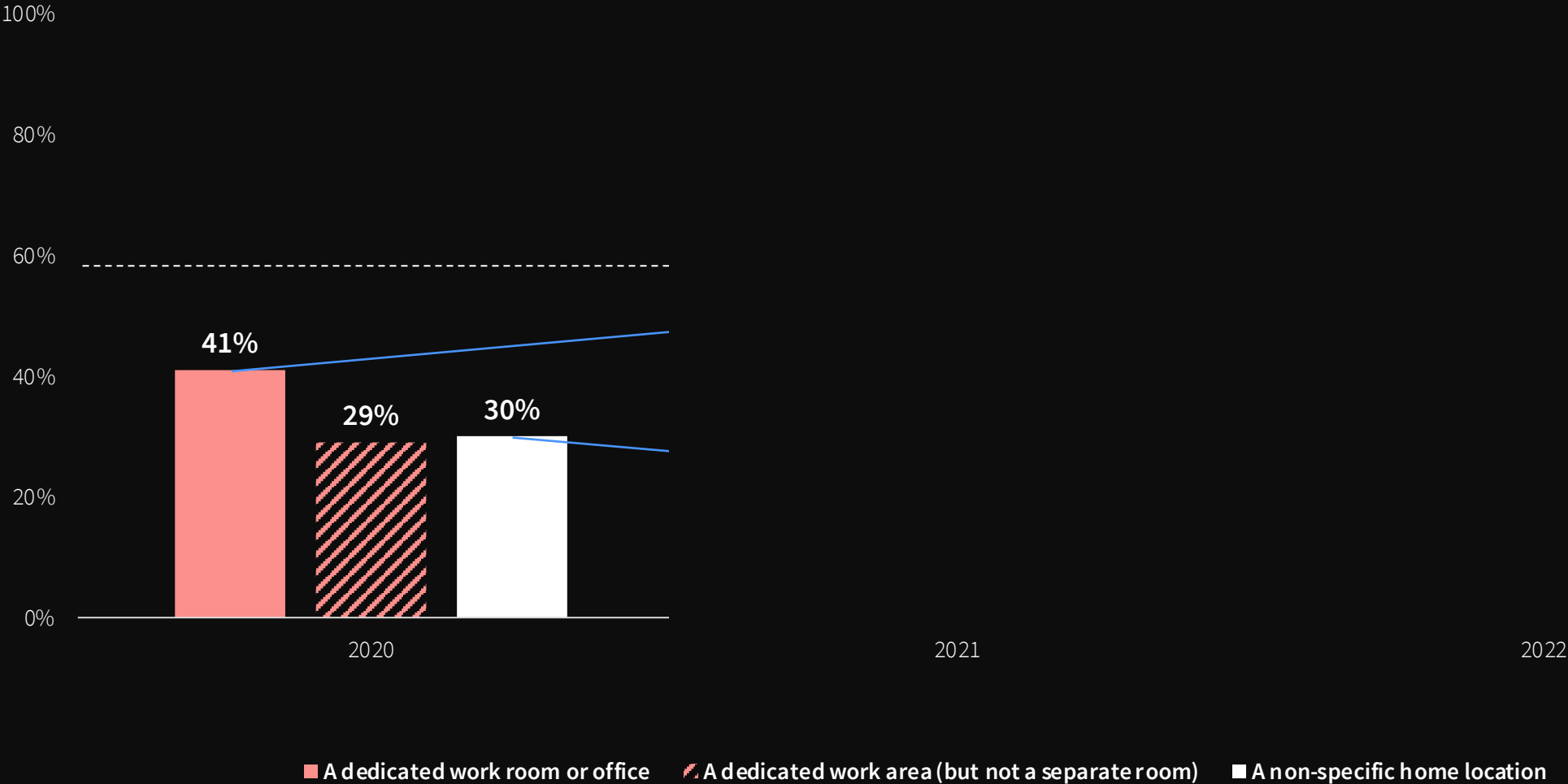
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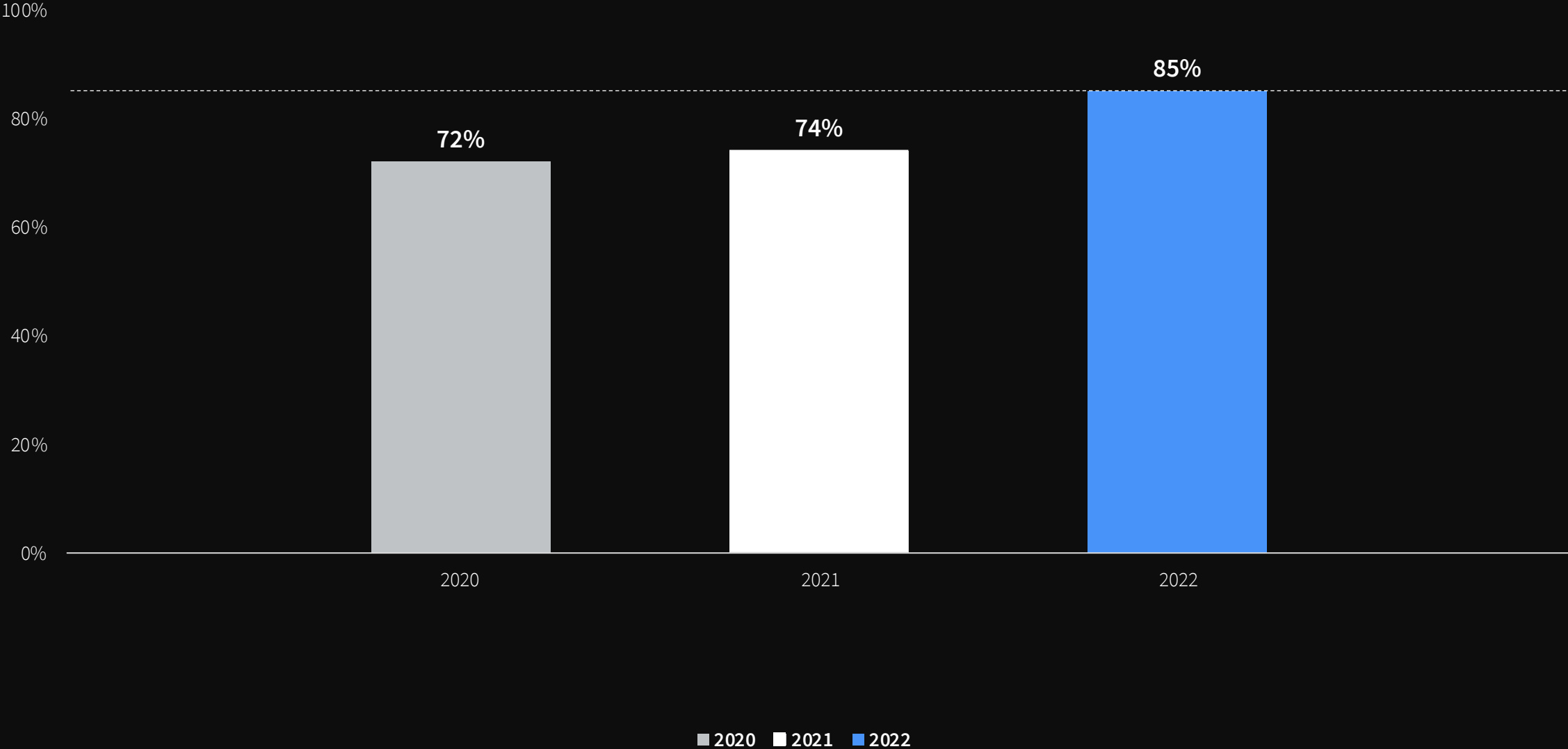
What are employees doing to support their home working?



Working from home, what type of work setting do you use most often?



Ability to maintain work-life balance - satisfaction %



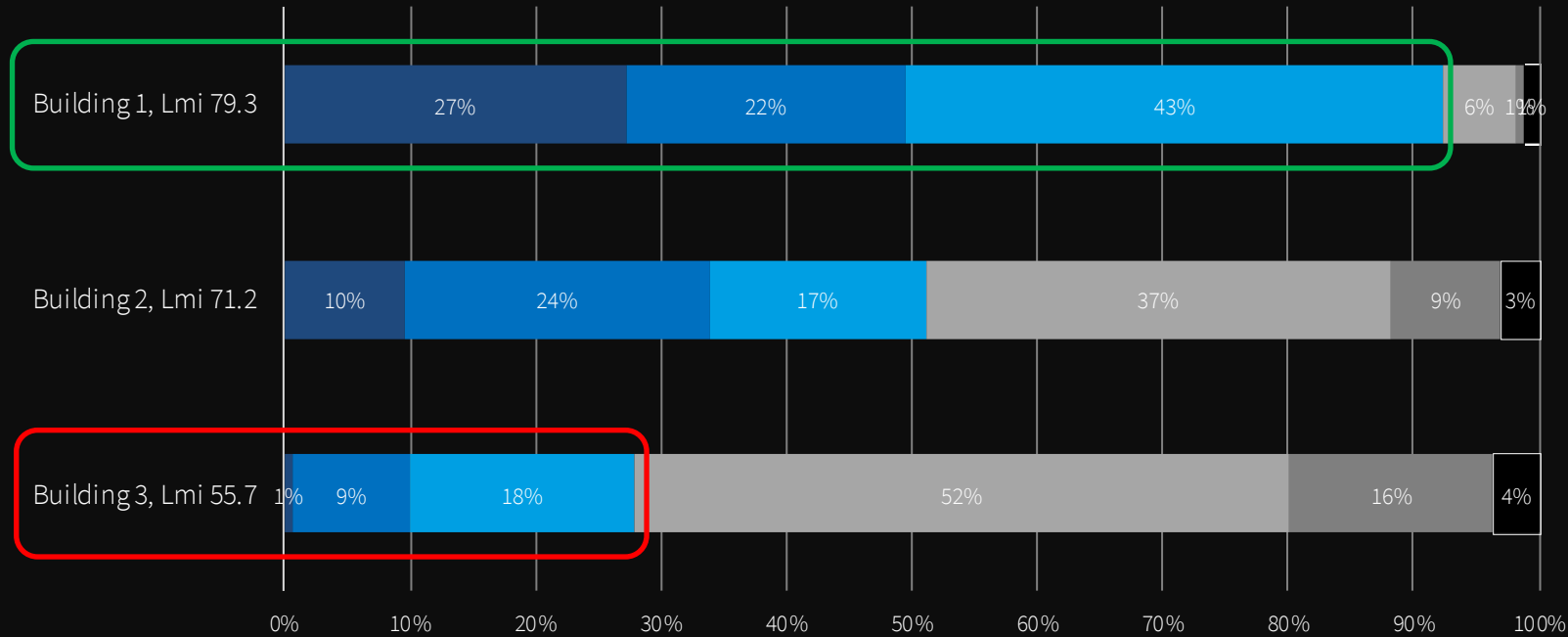


**Magnetising not
mandating**

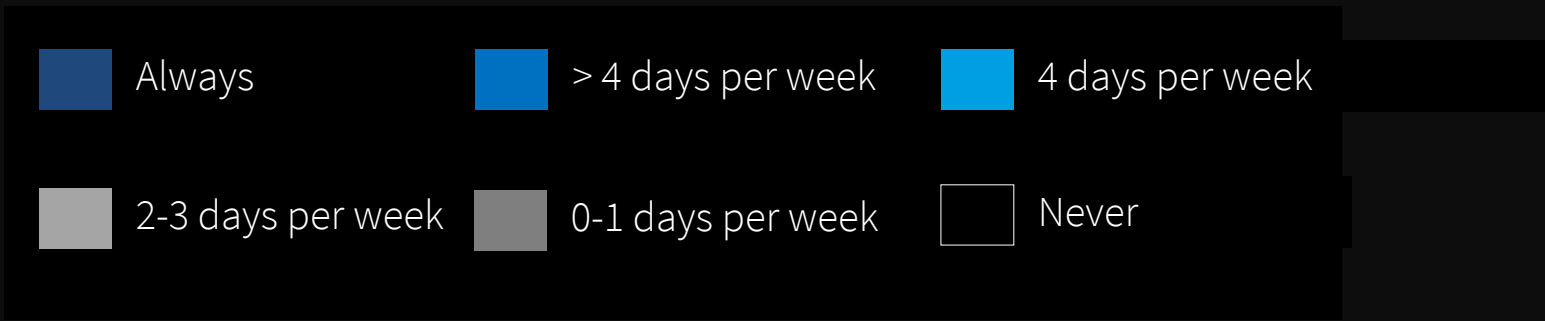
Earning the commute

What was a **cost of living**, is now a **cost of working**
Needs to provide something **better than at home**

Experience matters



Case organisation:
 In the future, how many days per week would you prefer to work from your main workplace?



Commute time * how many days in workplace * Lmi

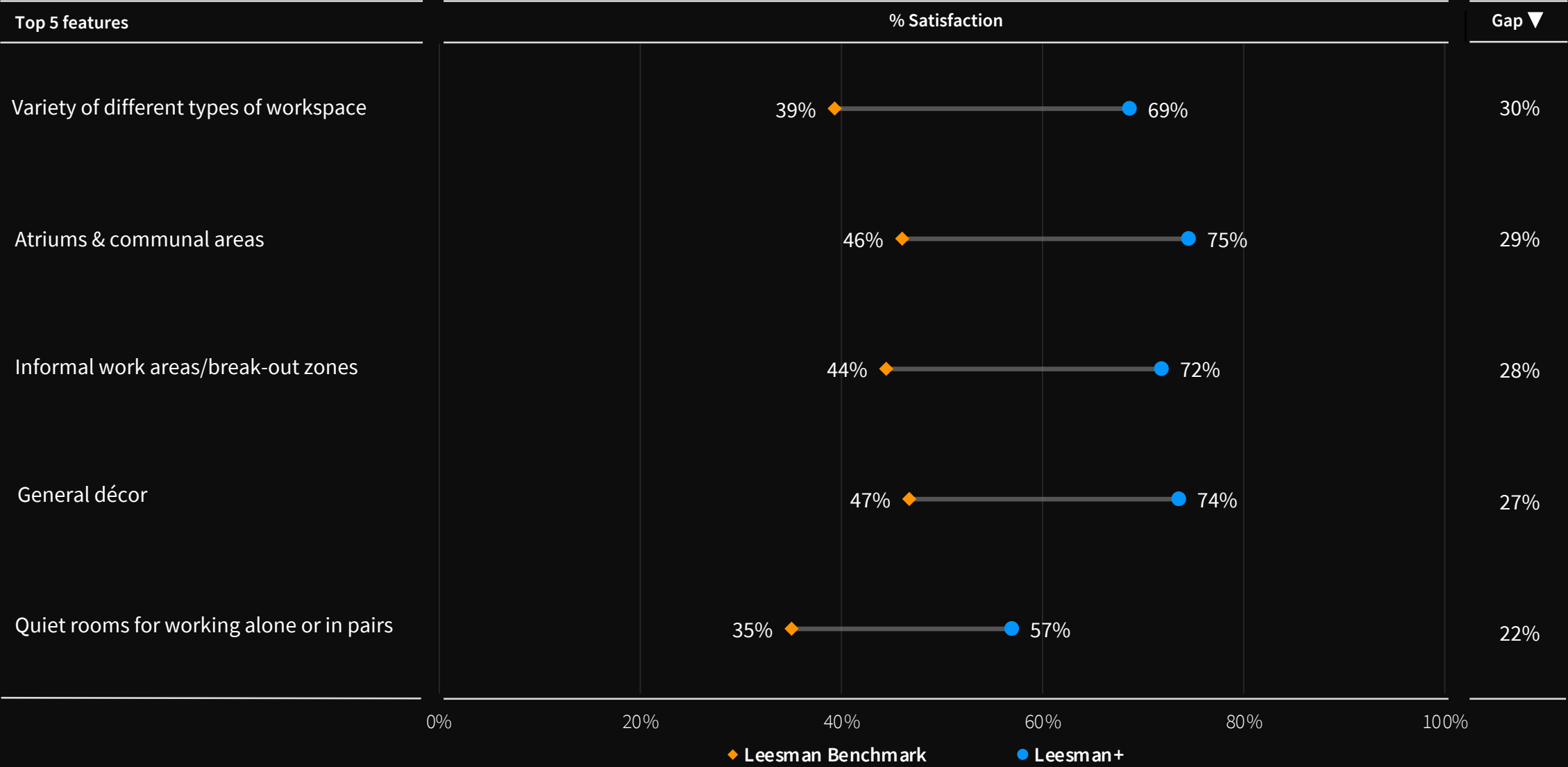
How many days in workplace	<15 min	15-30 min	30-45 min	45-60 min	1-2 hours	>2 hours
5 days per week	68.1	72.2	75.5	77.6	84.2	-
4 days per week	67.8	73.1	64.9	66.6	80.8	-
3 days per week	82.0	65.4	64.2	60.9	62.0	-
2 days per week	68.7	70.0	65.9	64.1	61.4	61.8
1 day per week	70.4	69.1	68.1	65.1	67.5	61.1
2-3 times per month	71.9	67.5	67.6	68.1	64.6	65.1
Once a month or less	77.2	72.0	64.9	65.7	63.6	57.8
Rarely or never	-	52.5	39.7	49.5	55.6	-
I have no fixed routine /As required	68.2	68.7	63.0	65.8	65.1	59.8

How do you close the gap to outstanding?

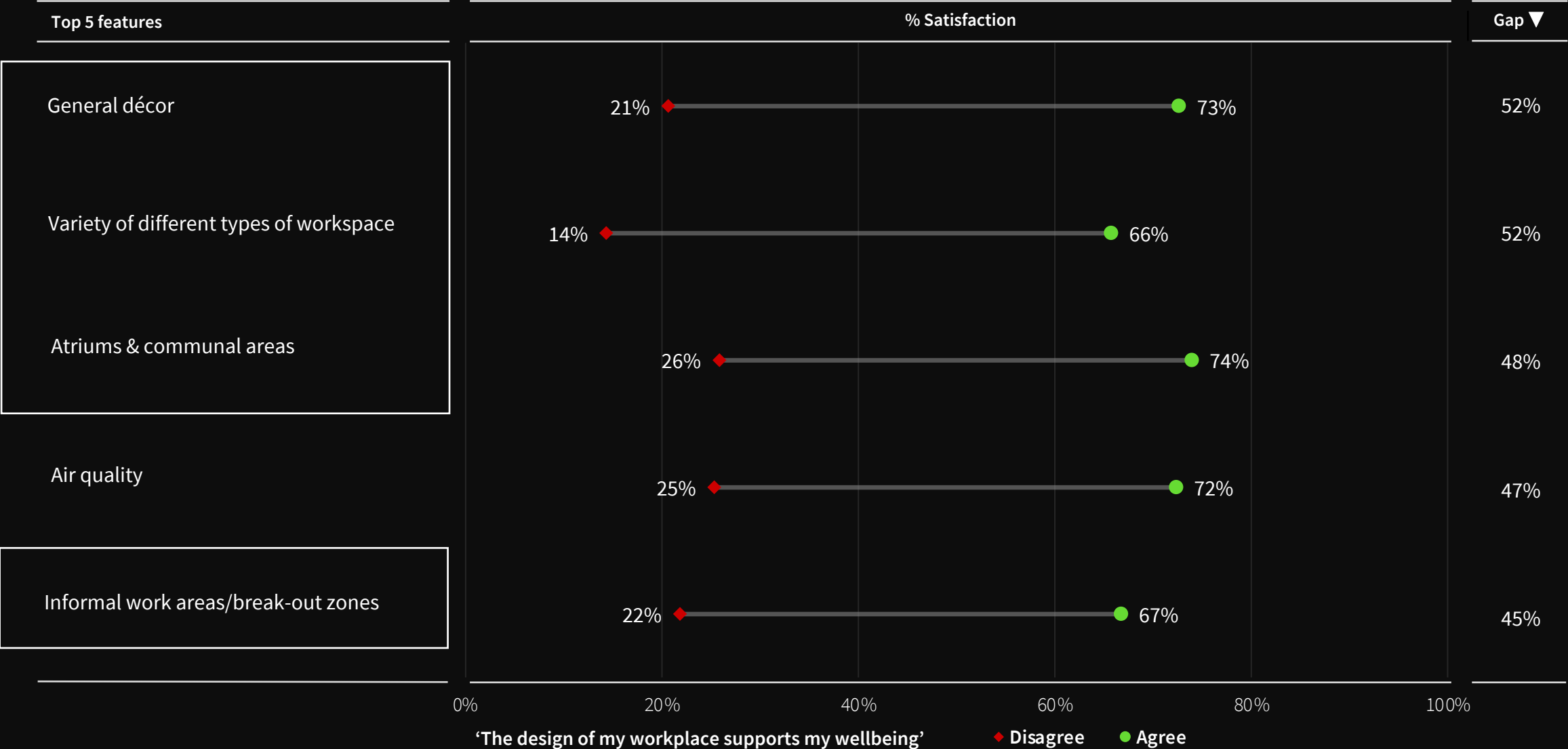
The impact code

Features with biggest gaps between average workplaces and outstanding workplace

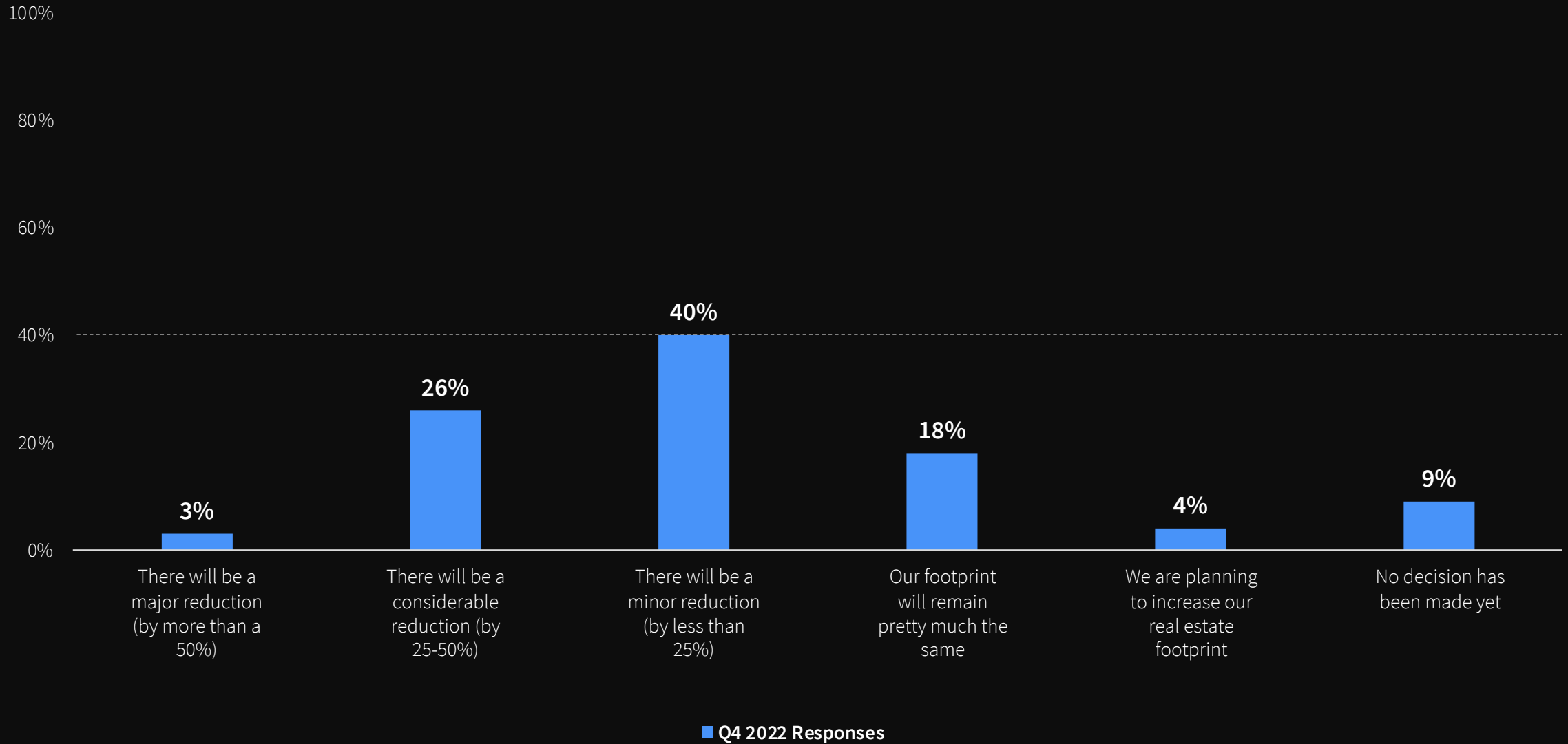
Features comparison – Benchmark vs Outstanding (Leesman+)



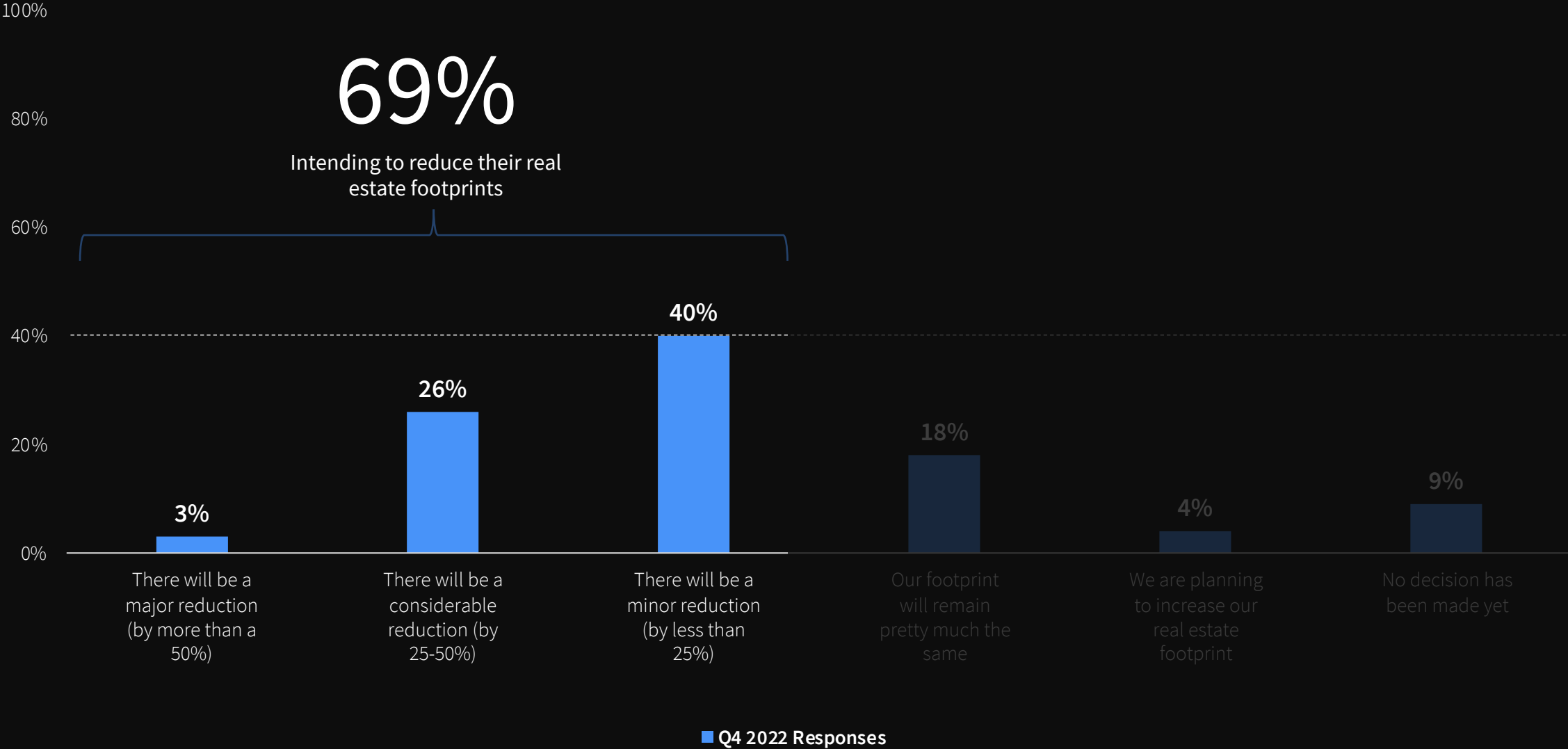
Workplace supports my wellbeing



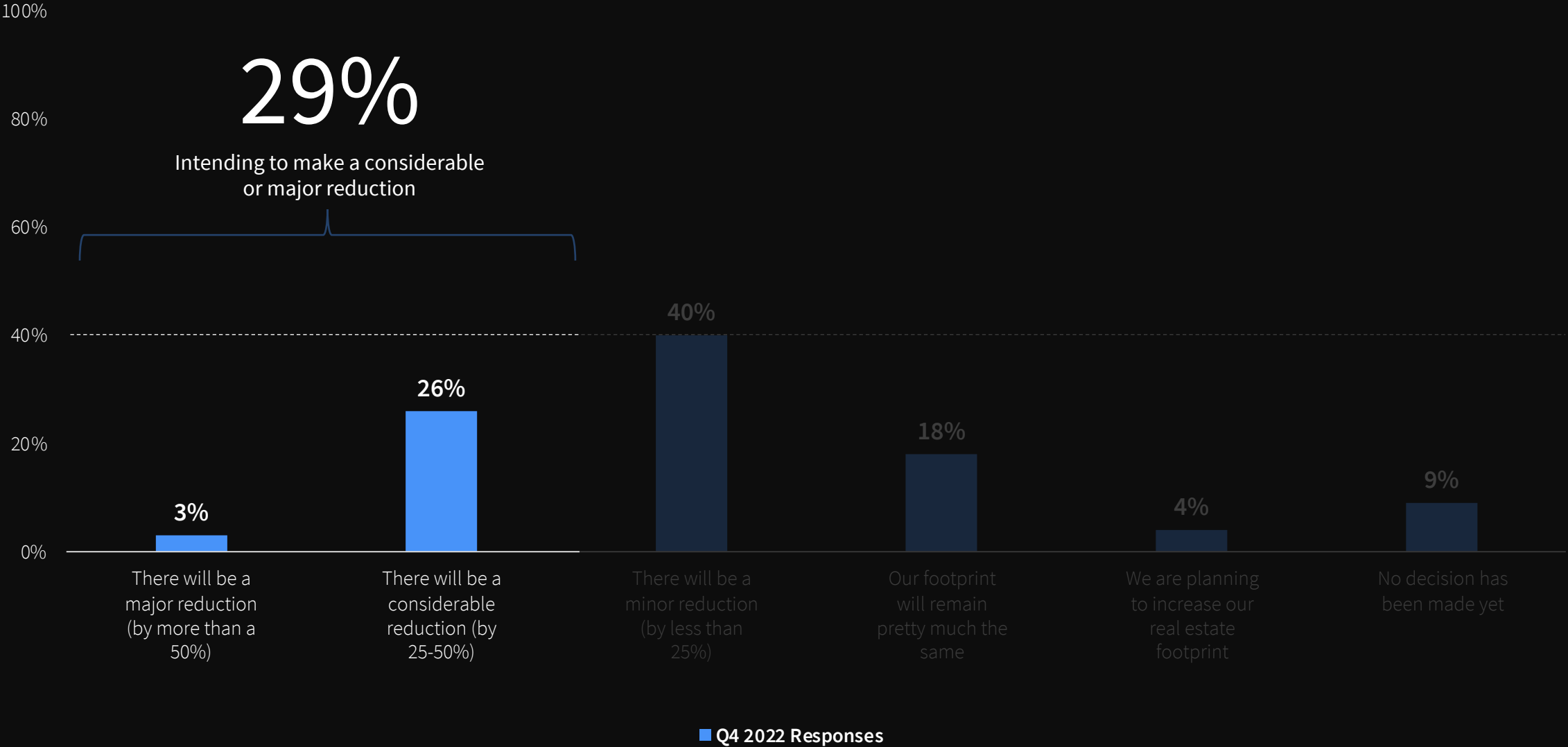
Changing real estate footprints



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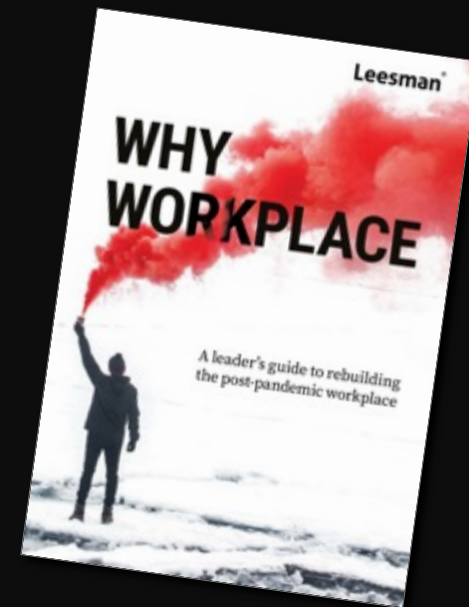


Risk of squeezing out the spaces
the impact wellbeing most

The future might be less space

But it has to be one with a much
higher quality experience...

1. Employees are building spaces in their homes to brilliantly support their work. The average home supports employees better than average office. ?
 2. Not willingly come back for activities better supported at home.
 3. The result is that 40% of employees are likely to come in less than one day per week.
 4. Mandating is likely to be counter-productive to wellbeing and experience
 5. However, employees WILL willingly come back for activities that are better supported there than in their homes. Key is to magnetise not mandate.
 6. Balancing act between connection and noise levels on wellbeing – impact of video calls on open plan.
 7. Four features which are key to creating outstanding environments and wellbeing. Not to value engineer out of workplaces when consolidating
- The future might be less space, but it needs to be better space.





Planning for the future

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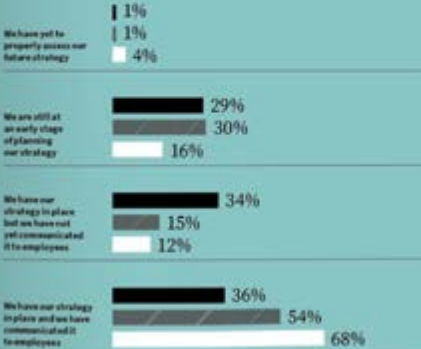
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Leesman Corporate Real Estate Leaders Poll Q4 2022

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