



Eden McCallum Insights on Hybrid Working

Business Leader and Office Worker Surveys

January 2022

eden
mccallum

In partnership with



Key findings: Business leader and office worker reflections on hybrid working

CONTEXT AND KEY FINDINGS

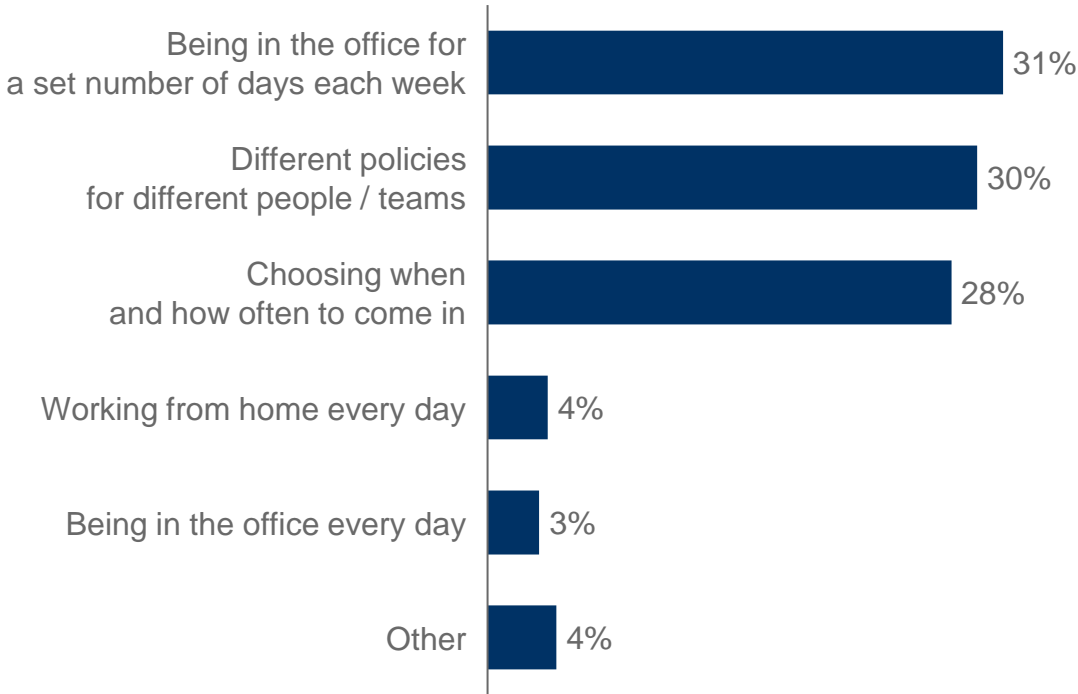
- We surveyed c. 200 business leaders and c. 500 UK office workers in mid-December, asking them about their perspectives and experiences with hybrid working
- This deck includes the findings from both surveys, revealing fascinating insights into where business leaders and office workers experiences of hybrid working are similar, and where they diverge
- A key finding is that the pandemic and hybrid working appears to have had a **more pronounced impact on business leaders' working lives than on office workers', and the former are more positive about the shift**
 - Almost 90% of business leaders are working from home more often now than before the pandemic, compared to 62% of office workers
 - The benefits and downsides of remote working are clearer cut for business leaders, as are the views on which tasks are better done in each environment
 - Business leaders are more positive about the overall impact of having the flexibility to work remotely, particularly from a personal perspective
- **Key findings for executives and managers** to bear in mind are:
 - **Hybrid working doesn't work for everyone, and there are different perceptions about company policies:** 9 in 10 business leaders say their company policy is hybrid working, while only 6 in 10 office workers say this is the case; furthermore, c.4 in 10 office workers are working, or would prefer to work, fully remotely or in the office
 - **Be clear on where you think tasks are best performed:** while both business leaders and office workers have similar views about which tasks are better done in the office vs. at home, business leaders' views are much more defined – what execs may think is an obvious choice is less clear to their teams
 - **Appreciate different reasons for home working:** saving money on commuting and greater health safety while home working are more important to office workers than business leaders, who are more focused on the time saving benefits
 - **Emphasise why being together matters and understand why working from home isn't easy for everyone:** challenges in interacting with colleagues are the most significant downsides for business leaders, while office workers see that as just one of many issues; the latter say lacking an appropriate space to work is a big downside to home-working – a factor not relevant for most business leaders
 - **Keep support in place:** the support measures companies have in place for remote working are appreciated by office workers, with flexible working hours, mental health support and financial support key; office workers are less interested in virtual events, and see health and safety home support as more important than business leaders appear to
 - **Consider widening the hiring net:** Almost two thirds of office workers would consider looking for a job anywhere in the country if they had the flexibility to work from home

c.90% of business leaders indicate their companies are doing hybrid working, while only c.6 in 10 office workers say this is their companies' policy or preference; c.4 in 10 office workers are working (or would prefer to work) fully remotely or in the office

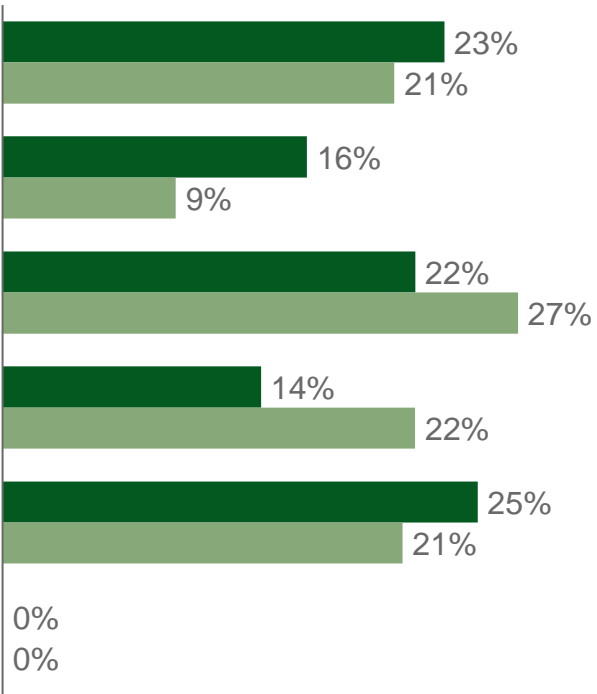
POLICY AND PREFERENCES ON WORKING FROM HOME AND IN THE OFFICE



Business leaders



Office workers

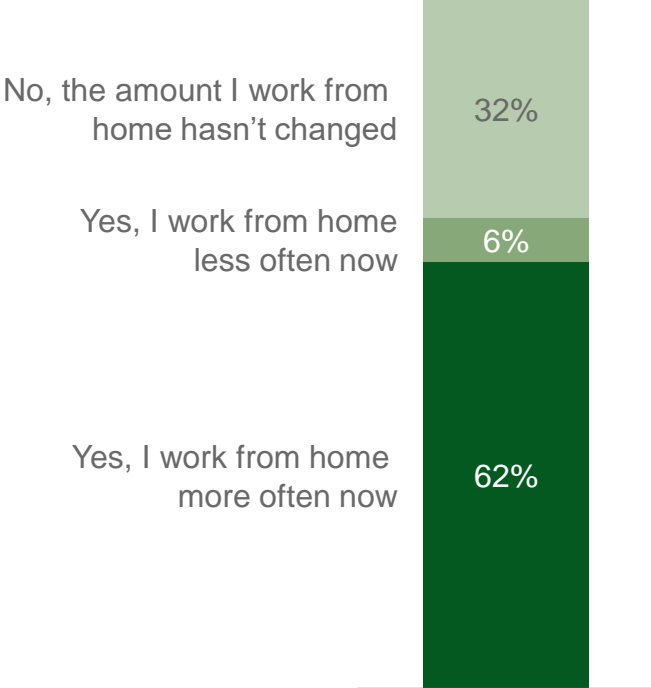
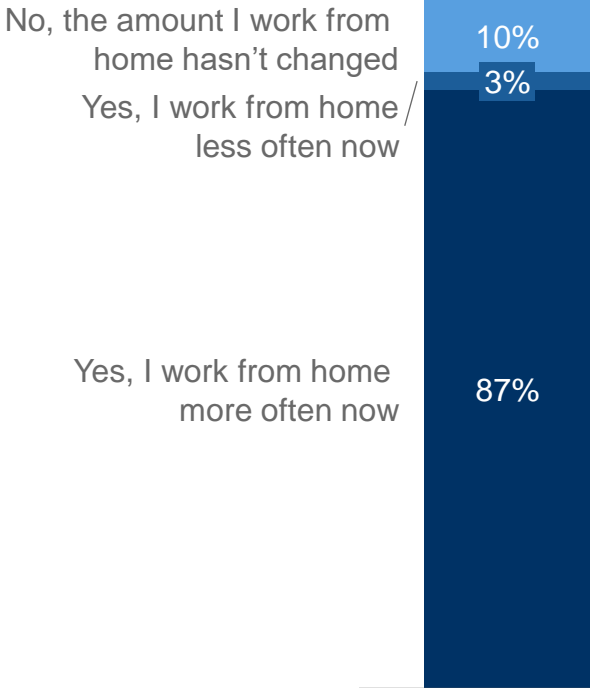


■ Company Policy ■ Personal Preferred Policy

Note: 1) Totals might not equal 100% due to rounding; 2) 'Other' is excluded (n;0) and excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer and Client Research Surveys December 2021; Office Worker – Preferred Policy n: 459; Office Worker – Employer Policy n: 454; Business Leader n: 192;
 WQ14/WQ15B/Q7: Which of the following most closely resembles your company's policy towards working from home and in the office? (phrased slightly differently for Office Workers – Preferred Policy)

c.90% of business leaders are working from home more often now than before the pandemic, compared to 62% of office workers

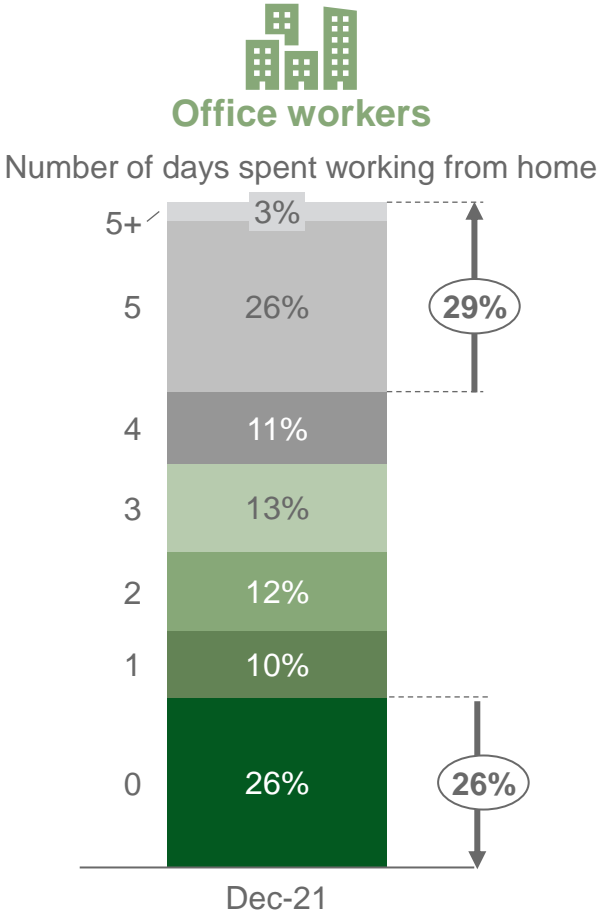
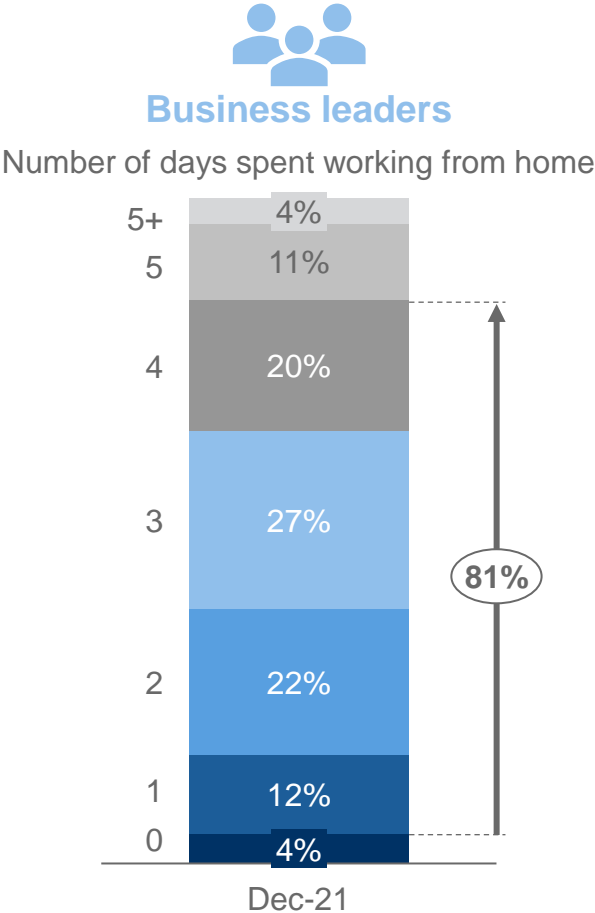
CHANGE IN DAYS WORKED FROM HOME VS PRE-PANDEMIC



Note: 1) Totals might not equal 100% due to rounding; 2) Excludes those who answered 'I don't know / doesn't apply'
Source: EM Consumer and Client Research Surveys December 2021; Office Workers n: 481; Business Leaders n: 183; WQ13_new/Q10: Have the number of days you work from home in an average week changed compared to before the Covid-19 pandemic?

Despite company policy, business leaders appear to be working in a more 'hybrid' way than office workers, with c. 80% of the former working 1-4 days from home while over half of office workers are fully remote or in the office

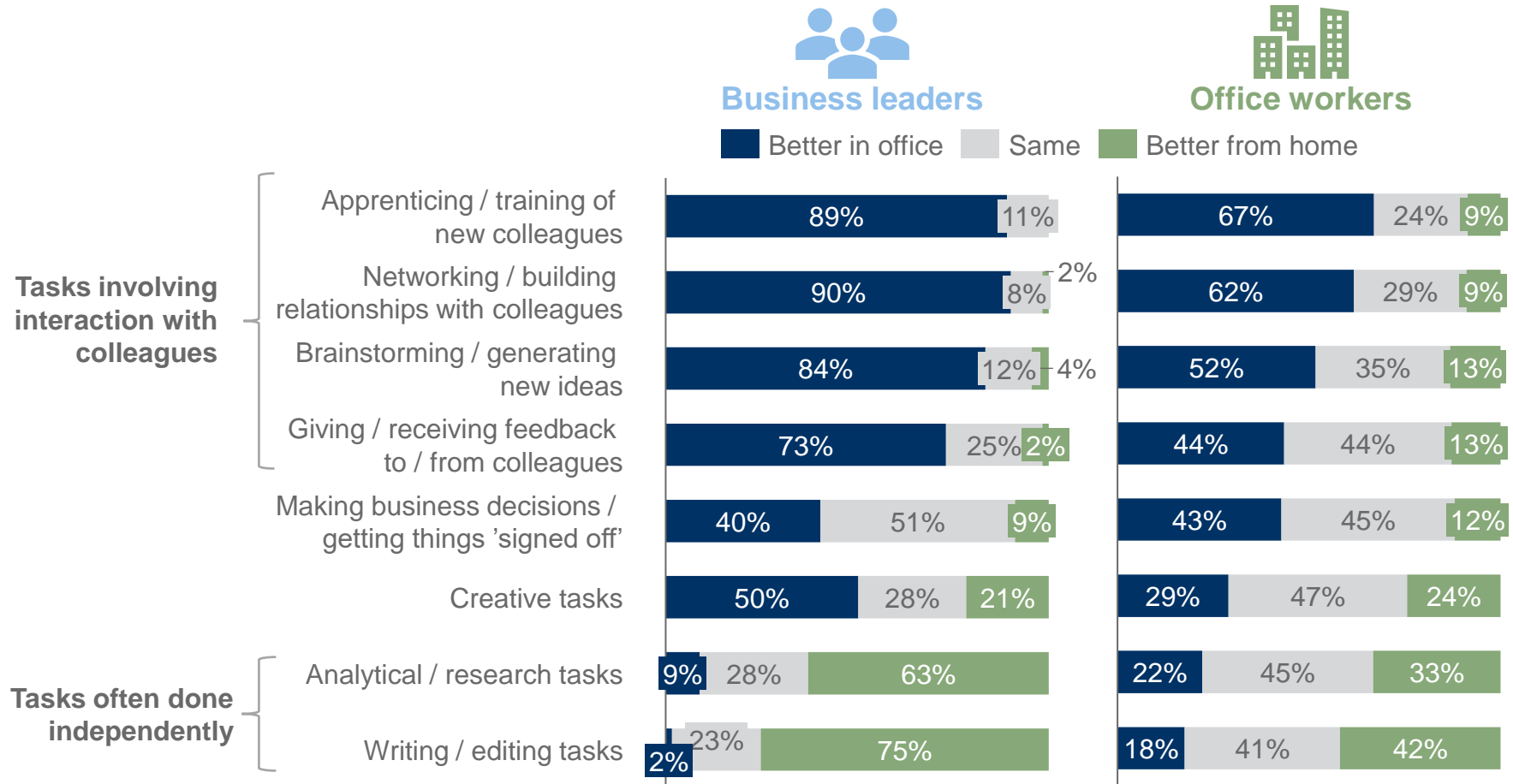
DAYS WORKED FROM HOME – AVERAGE PER WEEK



Note: 1) Totals might not equal 100% due to rounding; 2) Excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer and Client Research Surveys December 2021; Office Workers n: 481; Business Leaders n: 183; WQ12/Q9: In an average week, how many days do you work from home?

While both business leaders and office workers have similar views about which tasks are better done in the office vs. at home, business leaders have more defined preferences

PREFERENCE FOR TASKS TO BE DONE AT HOME OR IN THE OFFICE

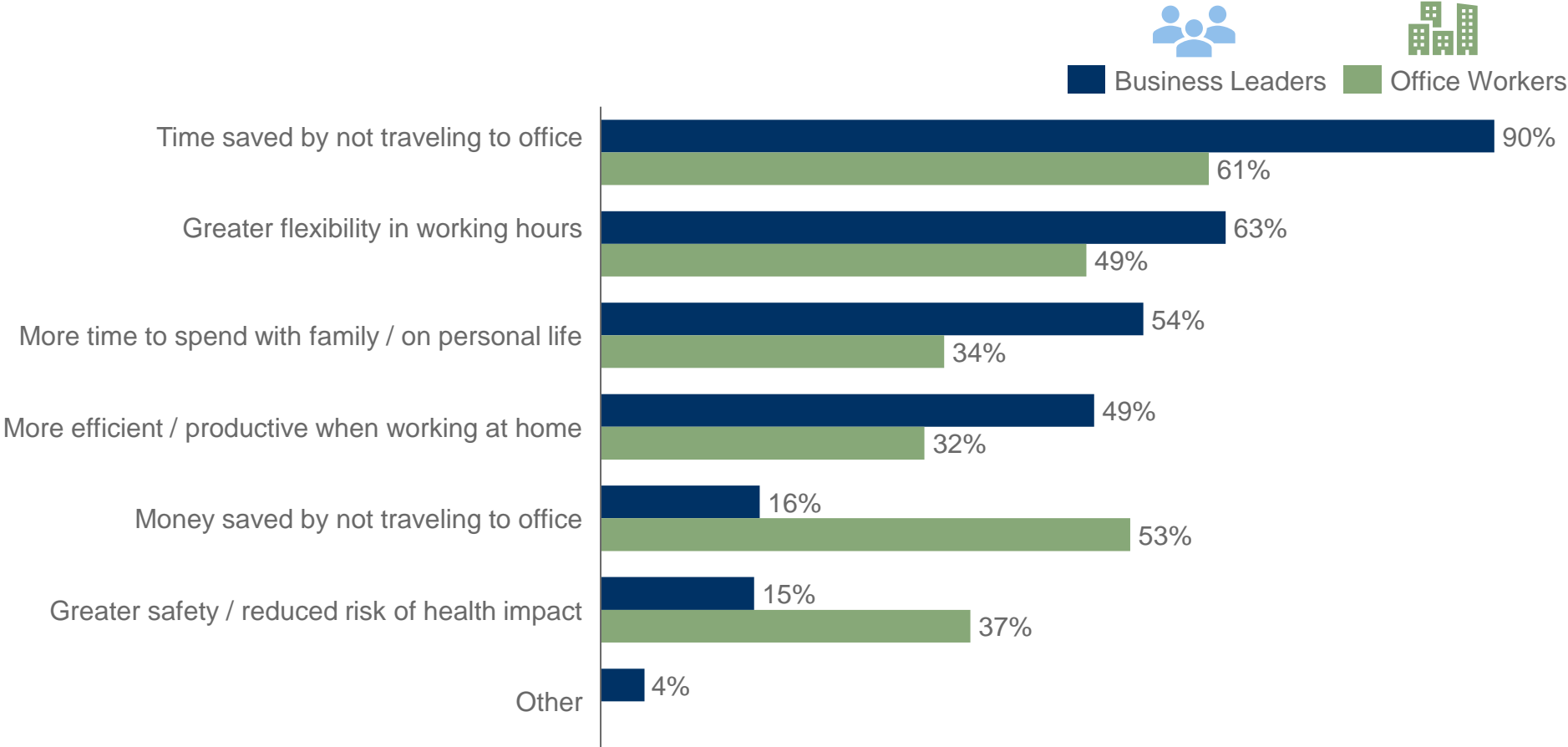


Note: 1) Totals might not equal 100% due to rounding; 2) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer and Client Research Surveys December 2021; Office Workers n ranges from 445 to 463; Business Leaders n ranges from 175 to 183
 WQ17_new/Q11: Which of the following do you think are better done at home and which are better in the office?

Saving money on commuting and greater safety while home working are more important to office workers than business leaders, who are more focused on the time saving benefits

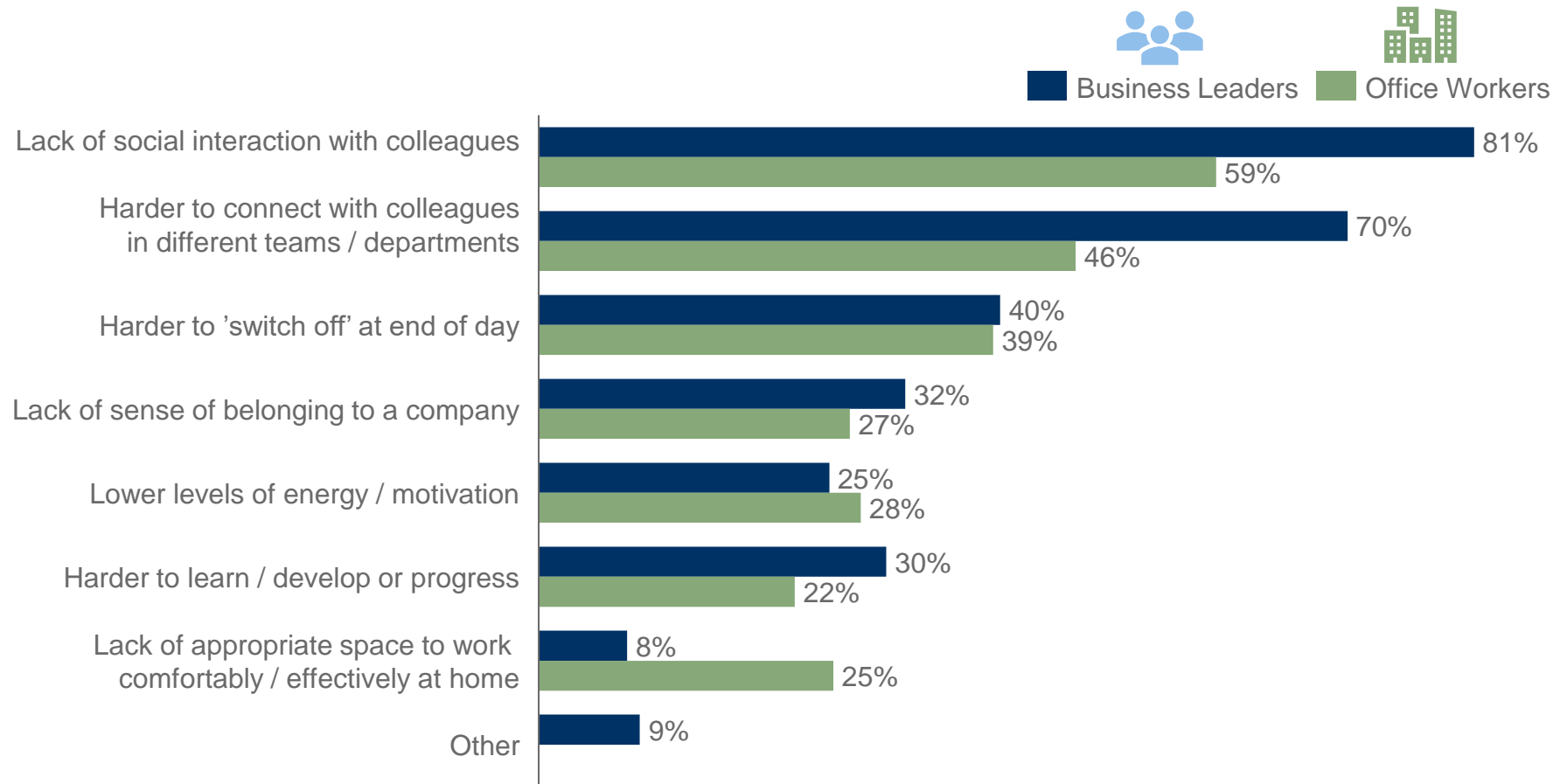
BENEFITS OF HOME WORKING



Note: 1) % is of total respondents on Q18_new; 2) Excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer and Client Research Surveys December 2021 : December 2021; Office Workers n: 481; Business Leaders n: 182; Q18_new / Q12 - Many people identify potential benefits from home working. What do you consider to be the top 3 benefits?

Challenges in interacting with colleagues are the key downsides for 70%+ of business leaders; office workers are less focused on any one area, and have greater concern than their bosses about space for home-working

NEGATIVES OF HOME WORKING



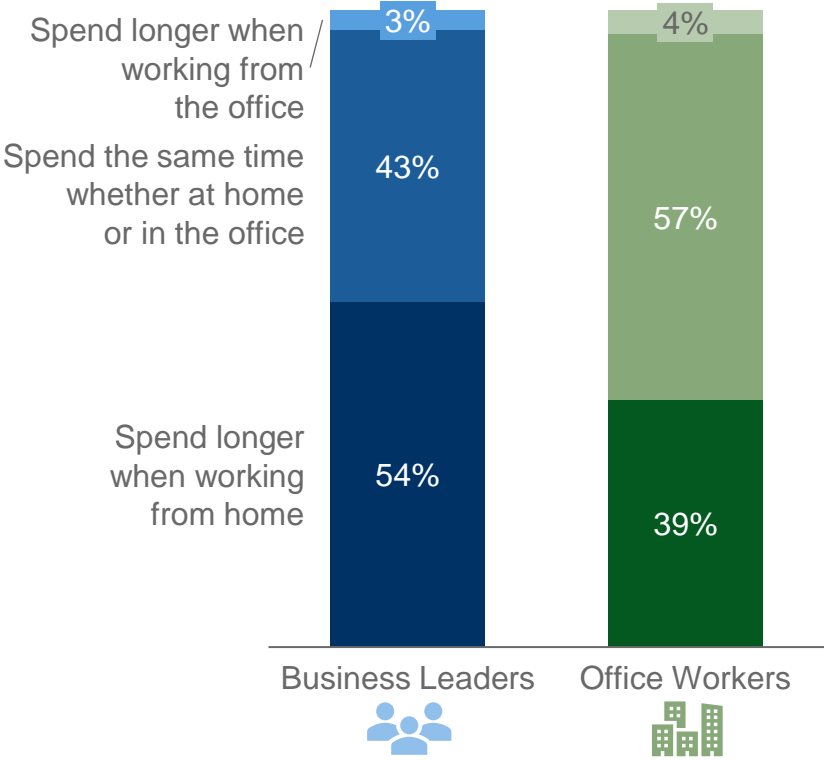
Note: 1) % is of total respondents on Q18_new; 2) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer and Client Research Surveys December 2021; Office Workers n: 420; Business Leaders n: 183; Q19_new / Q13 - Many people identify potential negatives of working from home. What do you consider to be the top 3 downsides?

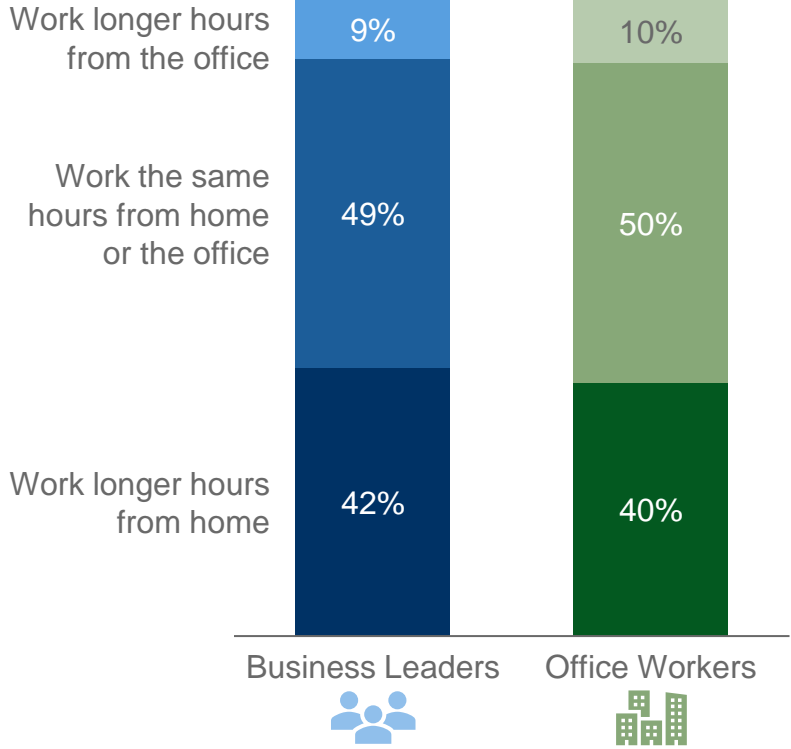
Business leaders are more likely to spend longer working when at home (54%) compared to office workers (39%)

TIME SPENT WORKING FROM HOME VS IN THE OFFICE: 'WORK' AND DOMESTIC TASKS

Hours worked at home vs in the office



Hours spent on domestic tasks



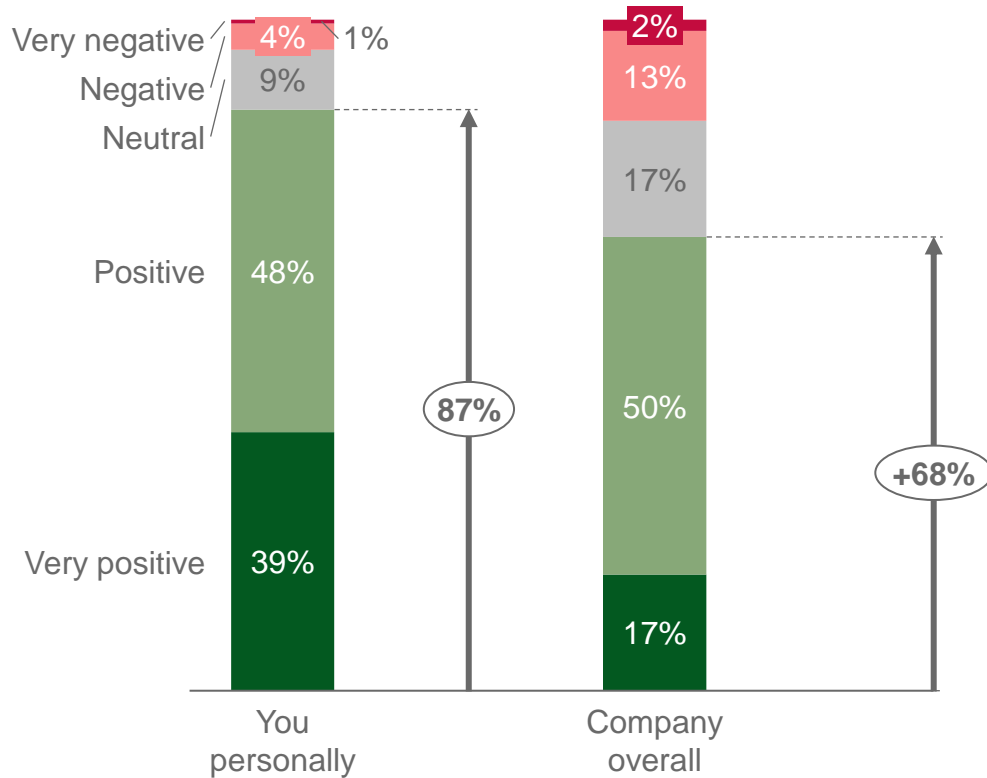
Note: 1) Excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer and Client Research Surveys December 2021; Office Workers n: 171 & 162; Business Leaders n: 171 & 166; WQ16/Q15: How do your working hours compare on the days you work from home vs the days you are in the office and WQ17/Q16: How do the hours you spend on domestic / family tasks compare on the days when you work from home vs the days you are in the office?

Business leaders are more positive about the impact of having the flexibility to work remotely, particularly from a personal perspective

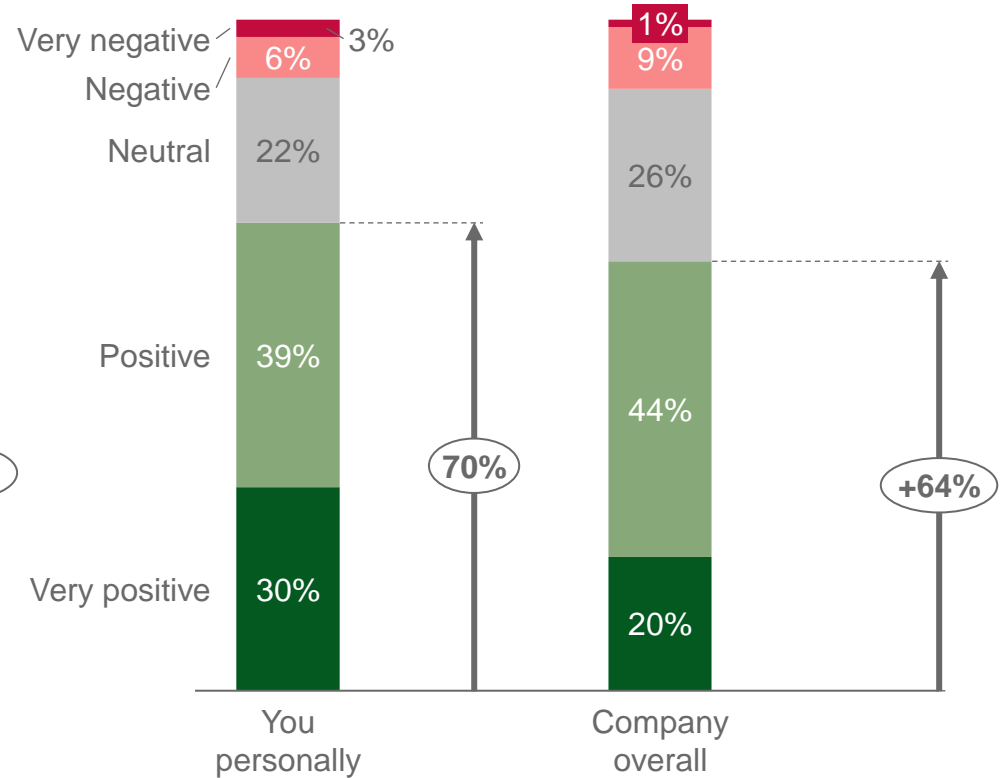
PERSONAL AND COMPANY IMPACT OF HYBRID WORKING



Business leaders



Office workers

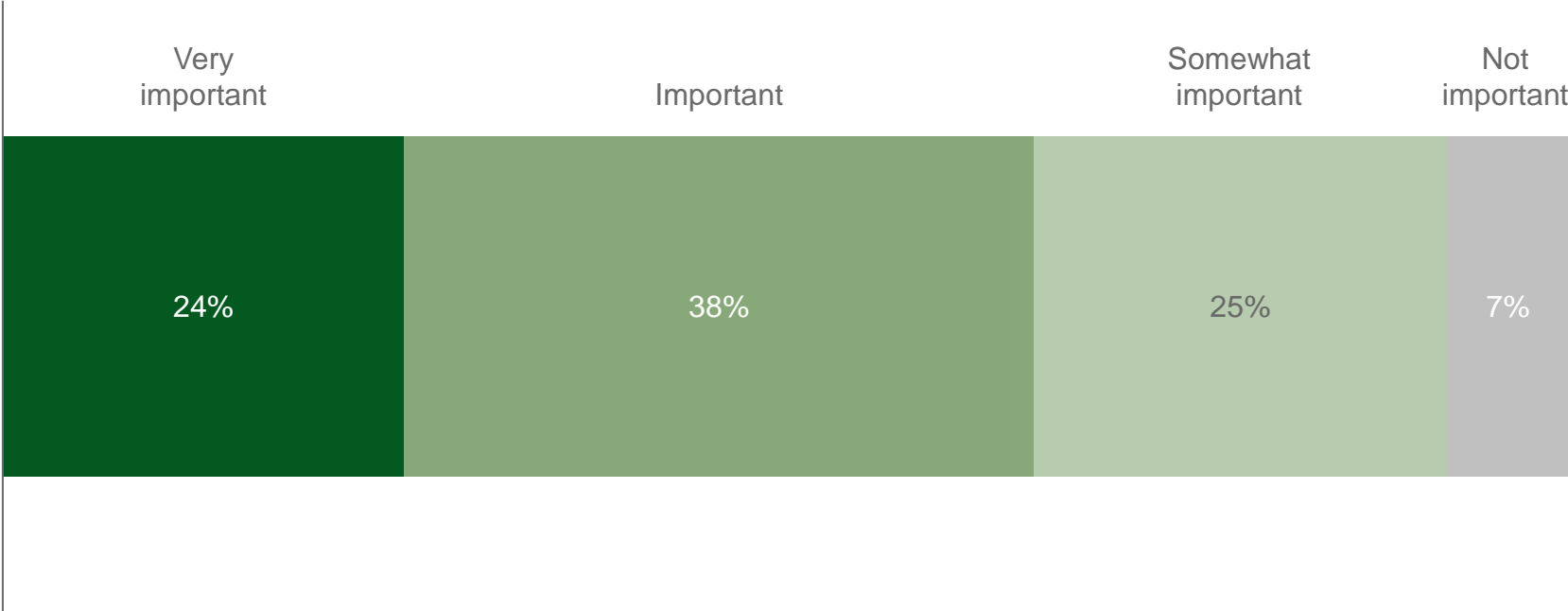


Note: 1) Totals may not equal 100% due to rounding; 2) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer and Client Research Surveys December 2021; Office Workers n: 462 to 447; Business Leaders n: 179; Q24_new/Q17 - On balance, what do you think is/would be the overall impact of having the flexibility to work from home?

For office workers, when they next change job, having the flexibility to work from home at least some of the time will be an important factor for c.60%

IMPORTANCE OF HYBRID WORKING FOR NEXT ROLE

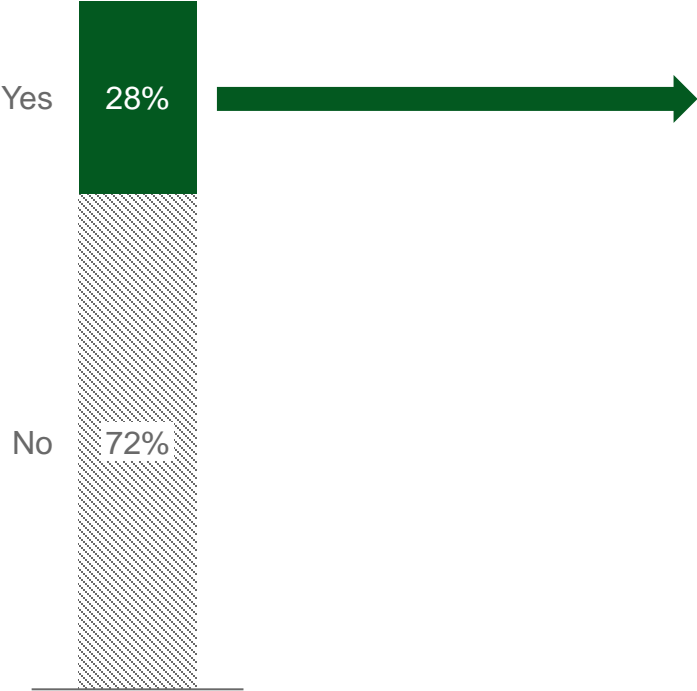


Note: (1) Totals may not equal 100% due to rounding; (2) Excludes those who answered 'I don't know / doesn't apply'
Source: EM Consumer Research Survey December 2021; n: 422 to 425; Q25_new: Thinking about the next time you change your job, how important will it be that your new employer offers you the flexibility to work from home at least some of the time?;

c.30% of office workers are considering leaving their job in the next 6-12 months, with the most important reasons being salary and work-life balance

OFFICE WORKERS CONSIDERING LEAVING JOB

Considering leaving job in next 6-12 months



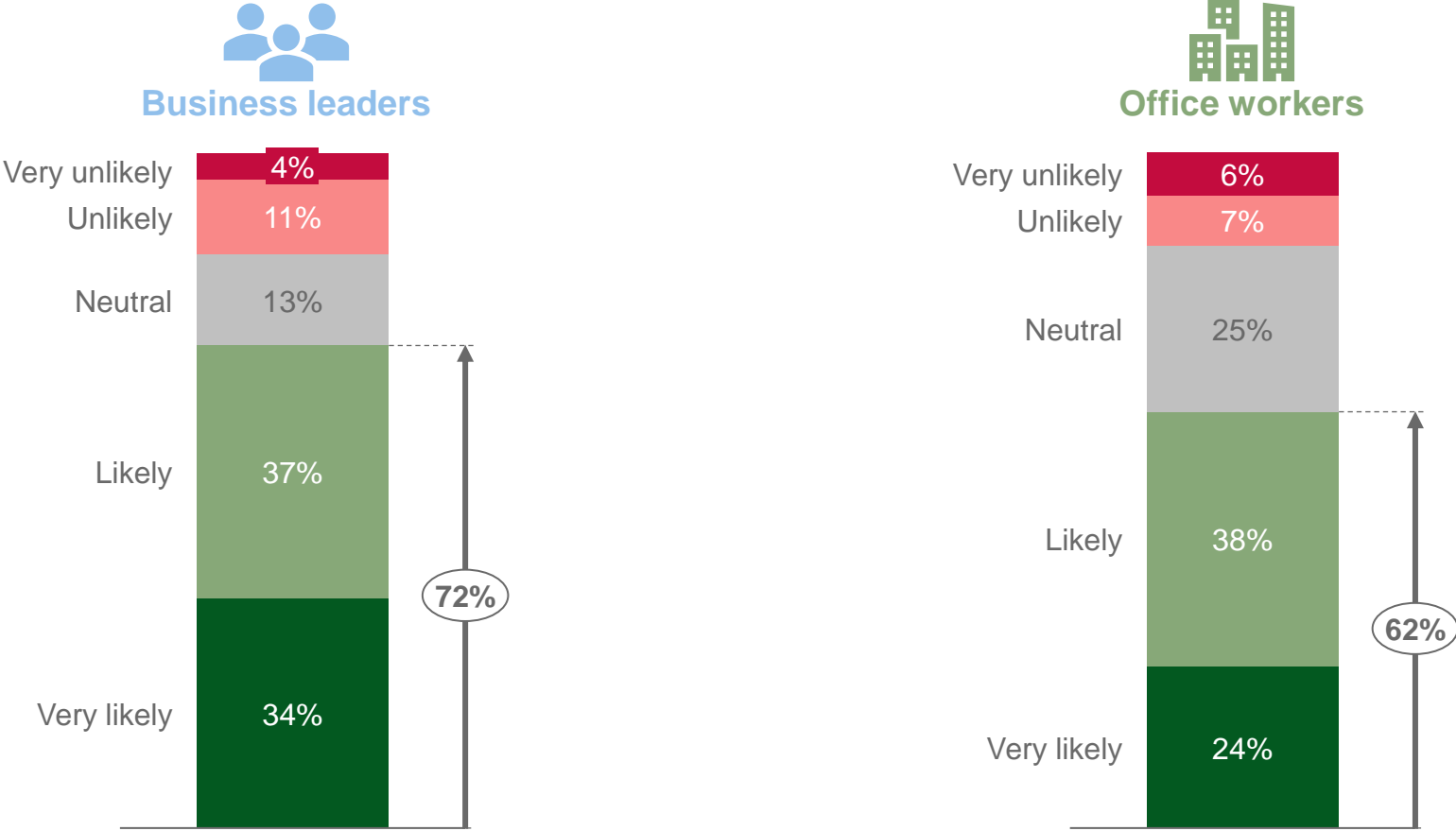
Reasons for considering leaving job



Note: 1) Totals may not equal 100% due to rounding; 2) RHS: % is of total respondents on WQ28_new; 3) Excludes those who answered 'I don't know / doesn't apply'
Source: EM Consumer Research Survey December 2021; n: 414 to 115; WQ27_new: Are you considering leaving your job in the next 6-12 months? And WQ28_new: Why are you considering leaving your job? Multiple answers possible.

c.60% would consider looking for a job anywhere in the country if they had the flexibility to work from home, and Business Leaders are likely (72%) to be open to hire employees with that option

WILLINGNESS TO WORK / HIRE ANYWHERE IN THE UK WITH HYBRID WORKING OPTION



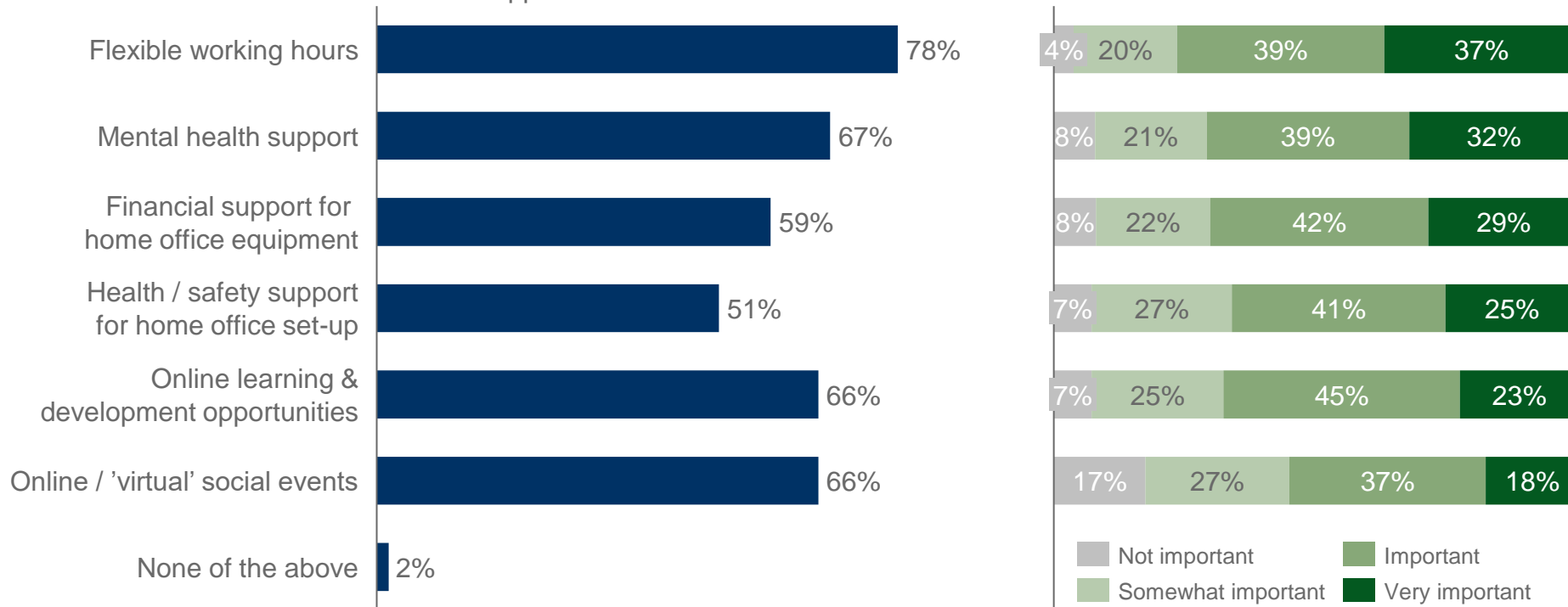
Note: (1) Totals may not equal 100% due to rounding; (2) Excludes those who answered 'I don't know / doesn't apply'
Source: EM Consumer and Client Research Surveys December 2021; Office Workers n: 425; Business Leaders n: 179; Q26_new/Q18: When you next change your job(or hire), how likely would you be to consider looking(recruiting) for jobs anywhere in the country if they offer you the flexibility to work from home at least some of the time?

The views of business leaders and office workers are largely aligned on support measures for home-working, with a slight disconnect on health and safety support (more valued by office workers) and virtual social events (less valued by workers)

IMPORTANCE OF MEASURES FOR SUPPORTING HOME WORKING THAT ARE IN PLACE



Support Measures in Place



Note: 1) % is of total respondents on Q20_new; 2) Excludes those who answered 'I don't know / doesn't apply'; 3) Importance score calculated by assigning a numerical value to each answer code where 'Very important' = 4, 'Important' = 3, 'Somewhat important' = 2, 'Not important' = 1
 Source: EM Consumer and Client Research Surveys December 2021; Office Workers n: 451; WQ21_new: How important do you think it is that your employer offers these measures to support people working from home?; Business Leaders n: 169; Q14 - Does your company have any of the following measures in place to support people who work from home?

Contents

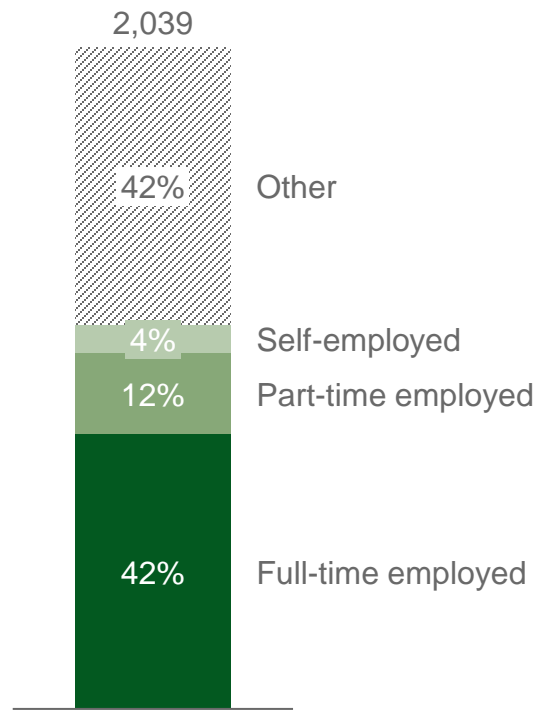


Sample demographics

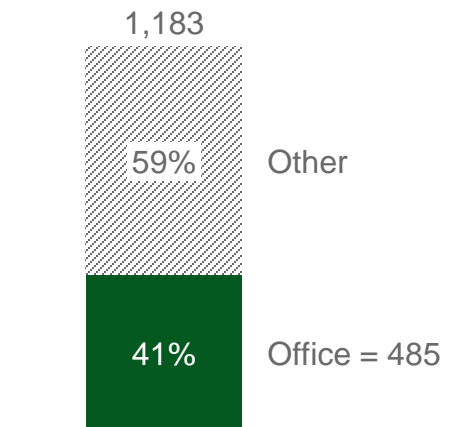
The office worker survey was carried out with office workers screened from a nationally representative sample of UK respondents

SCREENING OF UK RESPONDENTS

1 Screen for employment status



2 Screen for office working location

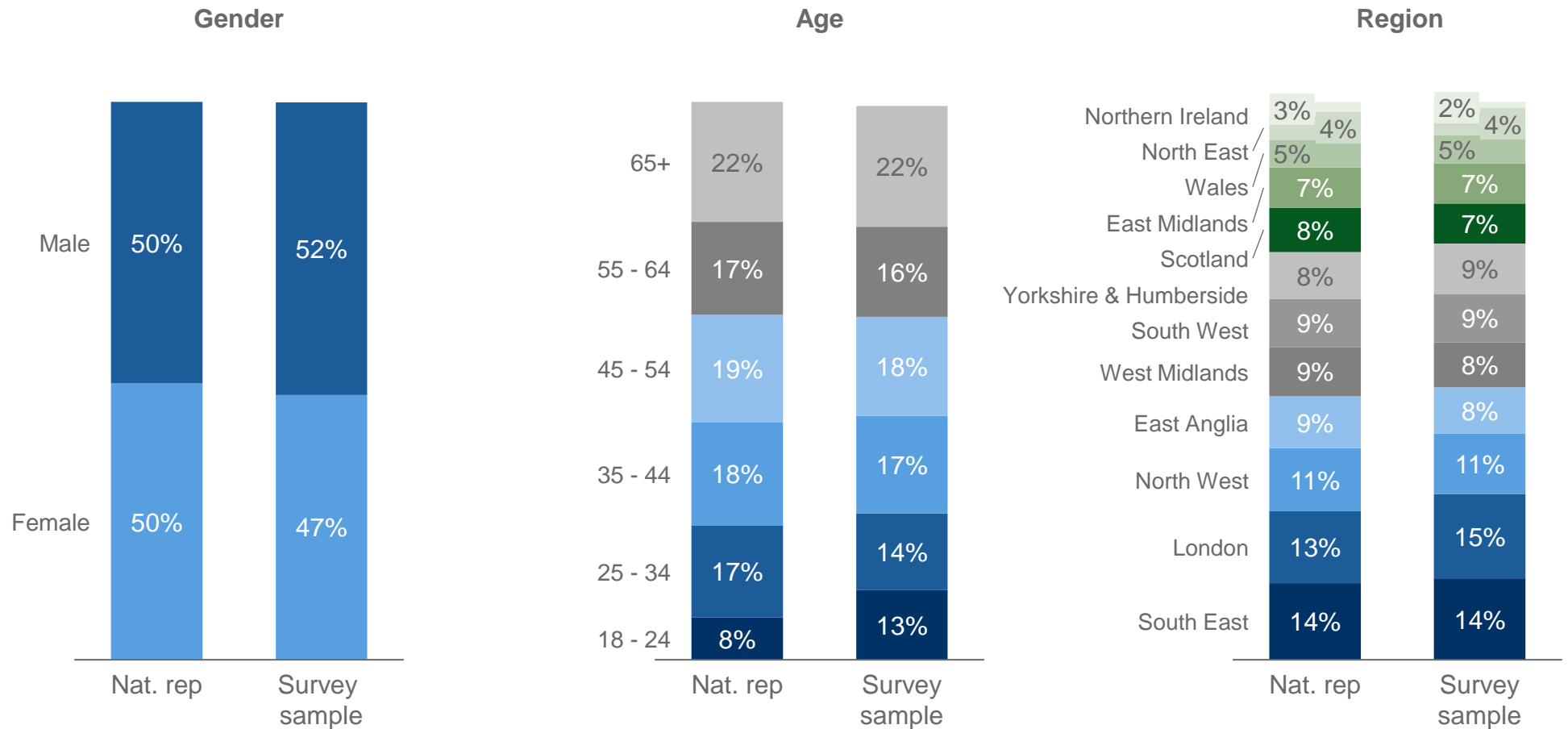


Note: 1) Totals might not equal 100% due to rounding; 2) Excludes those who answered 'I don't know / doesn't apply' and/or 'Prefer not to say'

Source: EM Consumer Research Survey December 2021; n; 2039 to 1183; WQ9: How would you describe your employment status? And WQ10: How would you describe the type of location you would normally spend most of your time working in?

The survey respondents are a nationally representative sample in terms of gender, age and regional distribution

KEY FACTS ABOUT THE UK SAMPLE

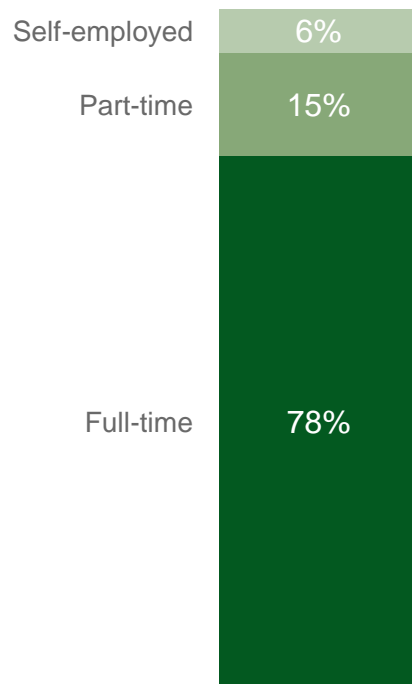


Note: 1) Totals may not equal 100% due to rounding; 2) Respondents who answered 'other' (on S3) or 'prefer not to say' have not been displayed
 Source: EM Consumer Research Survey December 2021; n: 2052 S1: What gender do you identify as?; S2: How old are you?; S3: Where do you live?

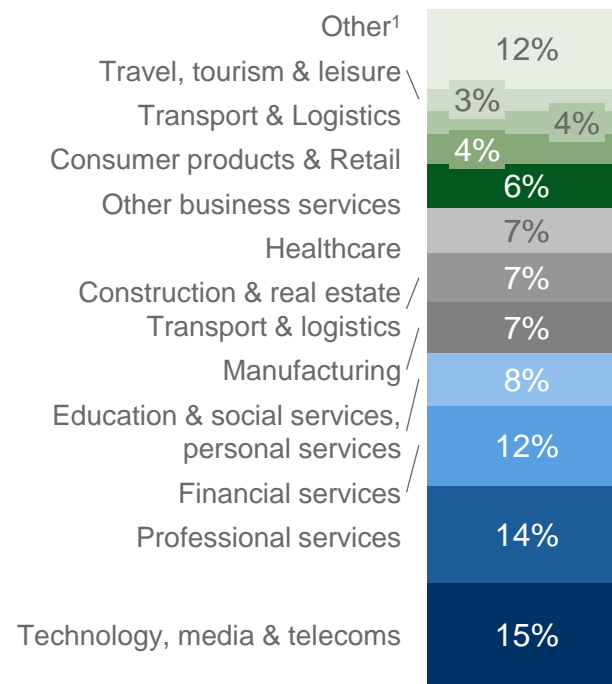
The office workers screened from the sample work in a broad range of industries and companies of varying sizes

UK WAYS OF WORKING: OFFICE WORKERS

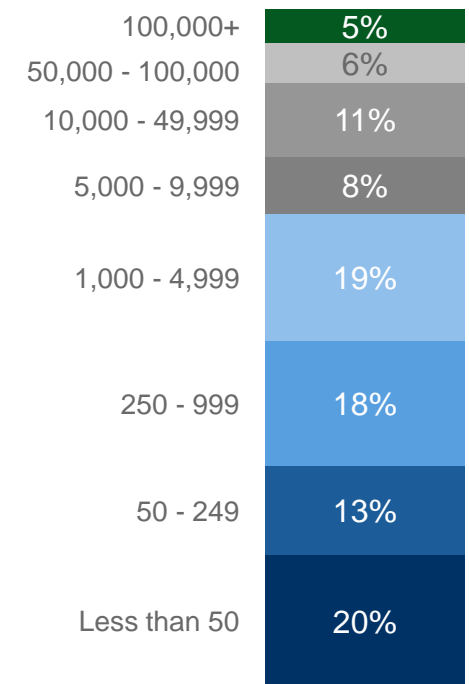
Employment status



Company's sector



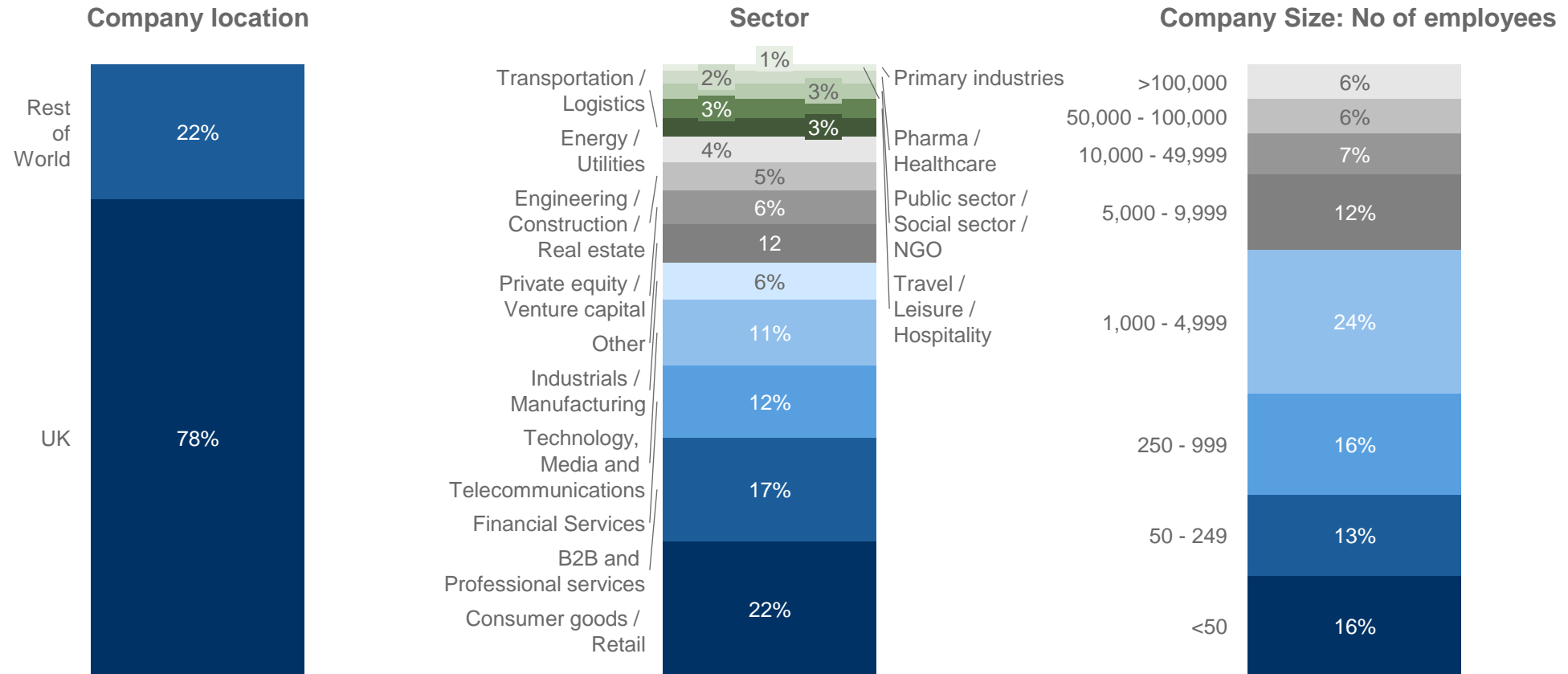
Company size: number of employees



Note: 1) Other includes public sector; civil services; utilities' agriculture; mining; oil & gas' automotive; 2) Totals may not equal 100% due to rounding; 3) Excludes those who answered 'I don't know / 'Prefer not to say'
 Source: EM Consumer Research Survey December 2021; n: 481 to 460; WQ9: How would you describe your employment status?; WQ21: What is your company's main line of business?; WQ22: How many people do your company employ in all of its locations?

The business leader survey was carried out with UK clients, with responses across a broad range of industries and company sizes

SURVEY SAMPLE REPRESENTATION (%)

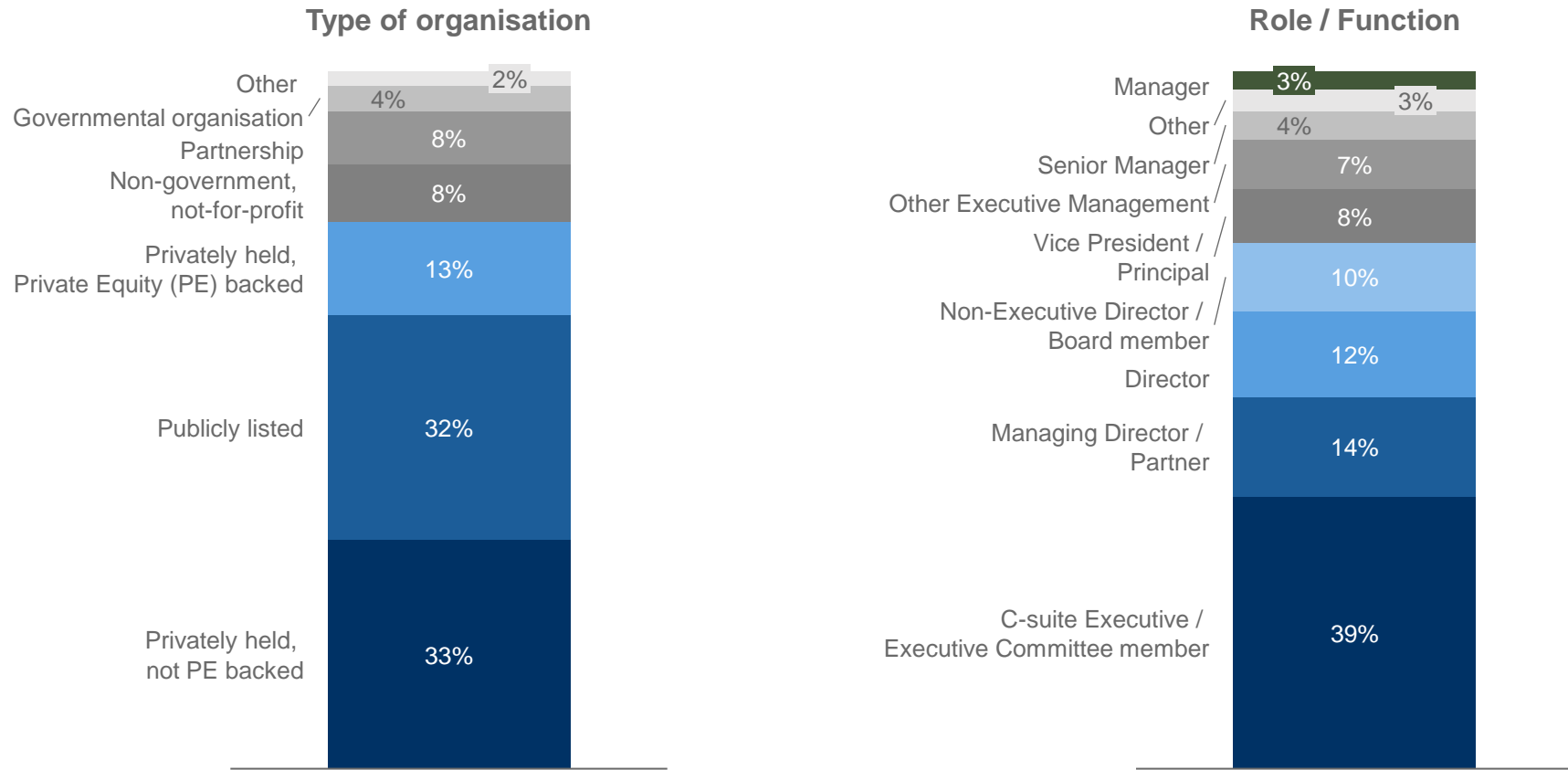


Source: Eden McCallum Ways of Working Survey: December 2021; n: 195; Q1 - What industry is your company / organisation in? Please select one option. Q2 - How many people does your company / organisation employ in total?; Q5 - In which country is your company / organisation's head office located?

Note: (1) Totals may not equal 100% due to rounding; (2) Excludes those who answered 'I don't know / doesn't apply'

The business leaders survey respondents were predominantly senior management, from a range of organisations in terms of ownership

SURVEY SAMPLE REPRESENTATION (%)



Source: Eden McCallum Ways of Working Survey: December 2021; n: 195; Q4 - Which of the following best describes your role within your organisation?; Q6 - How would you best describe your company / organisation?

Note: (1) Totals may not equal 100% due to rounding; (2) Excludes those who answered 'I don't know / doesn't apply'