



Eden McCallum Insights on Hybrid Working

Office Worker Surveys NL

October 2022

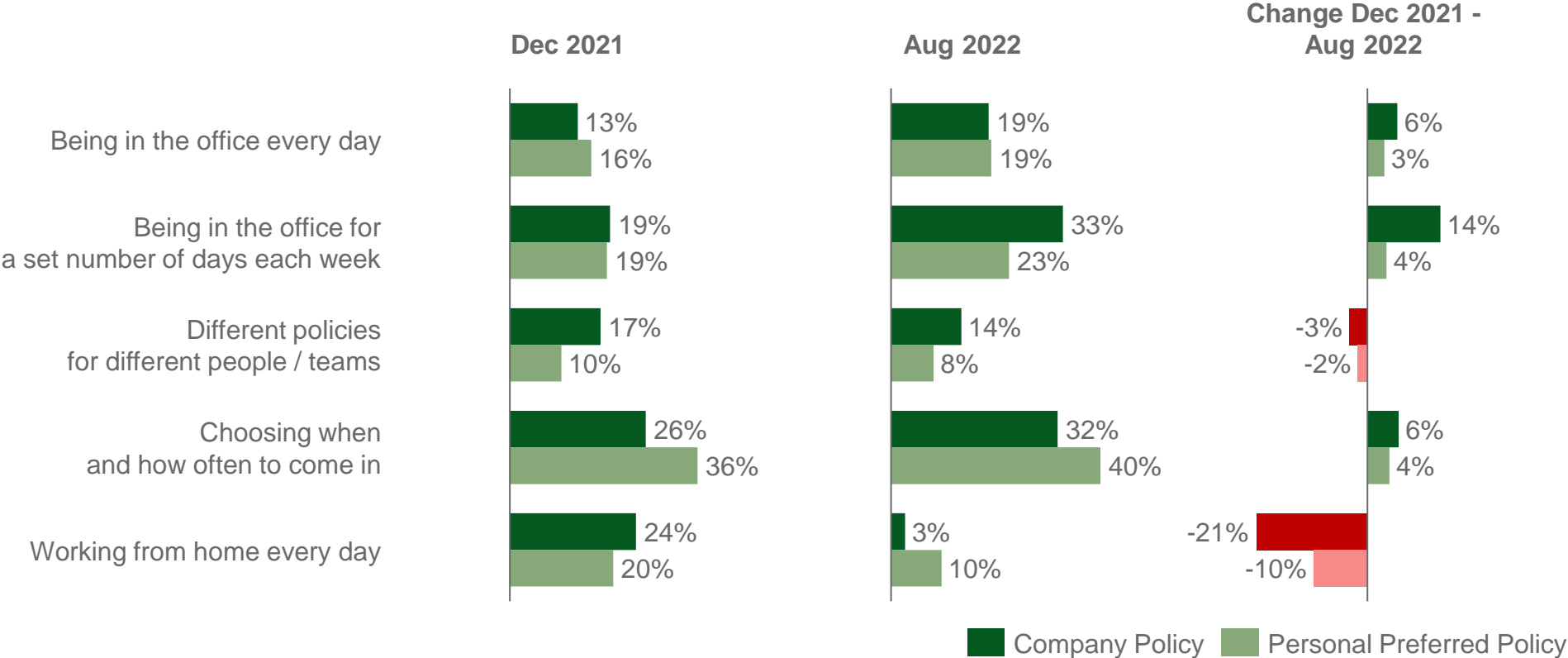
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The proportion of office workers working from home everyday has dropped by c.20ppts since Dec 2021, with 1 in 3 employers now specifying a set number of days in the office compared to 1 in 5 in Dec 2021

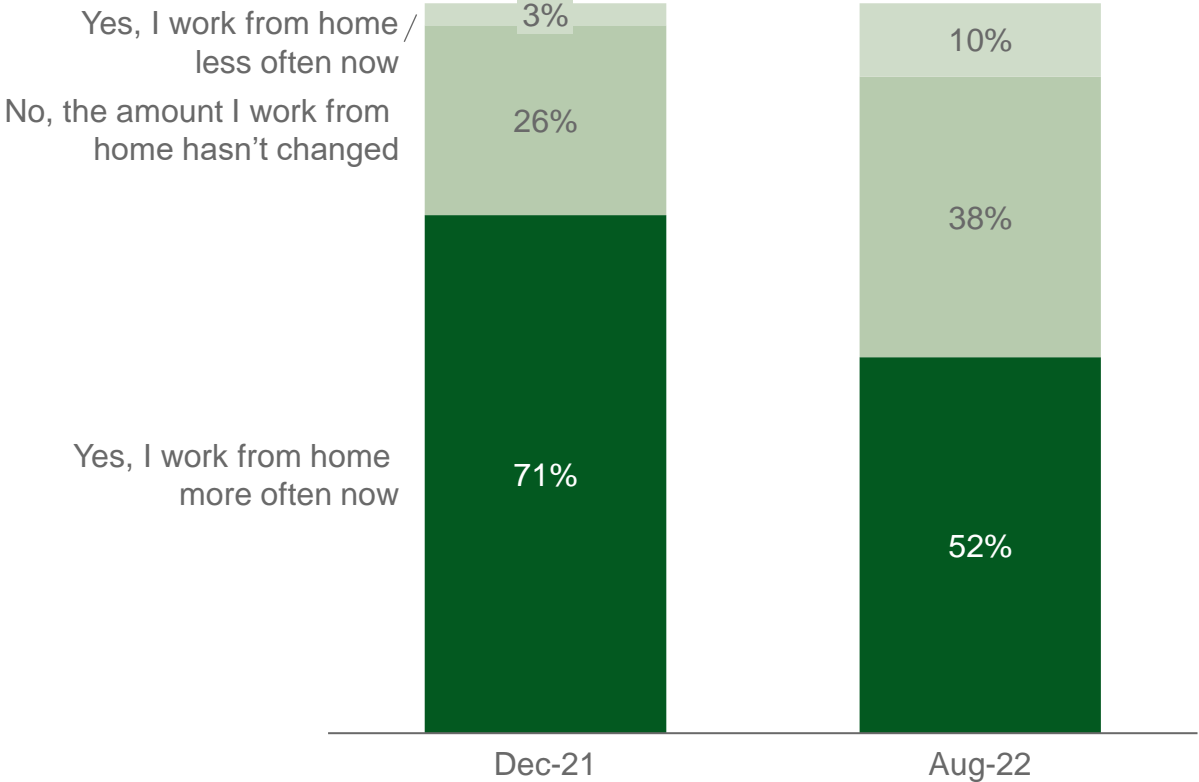
OFFICE WORKERS' POLICY AND PREFERENCES ON WORKING FROM HOME AND IN THE OFFICE



Notes: December 2021 n = 350, August 2022 n = 679; Questions: 'If you could set the policy for working from home and in the office for you and your colleagues each week, what would you choose?'; 'Which of the following most closely resembles your company's policy towards working from home and in the office?'; Excludes those who answered 'I don't know / doesn't apply / Other'; Due to rounding percentages may not sum precisely
 Source: Eden McCallum & Dynata surveys

As these policies take effect, c.50% of office workers are working from home more often now than before the pandemic, compared to c.70% in Dec 2021

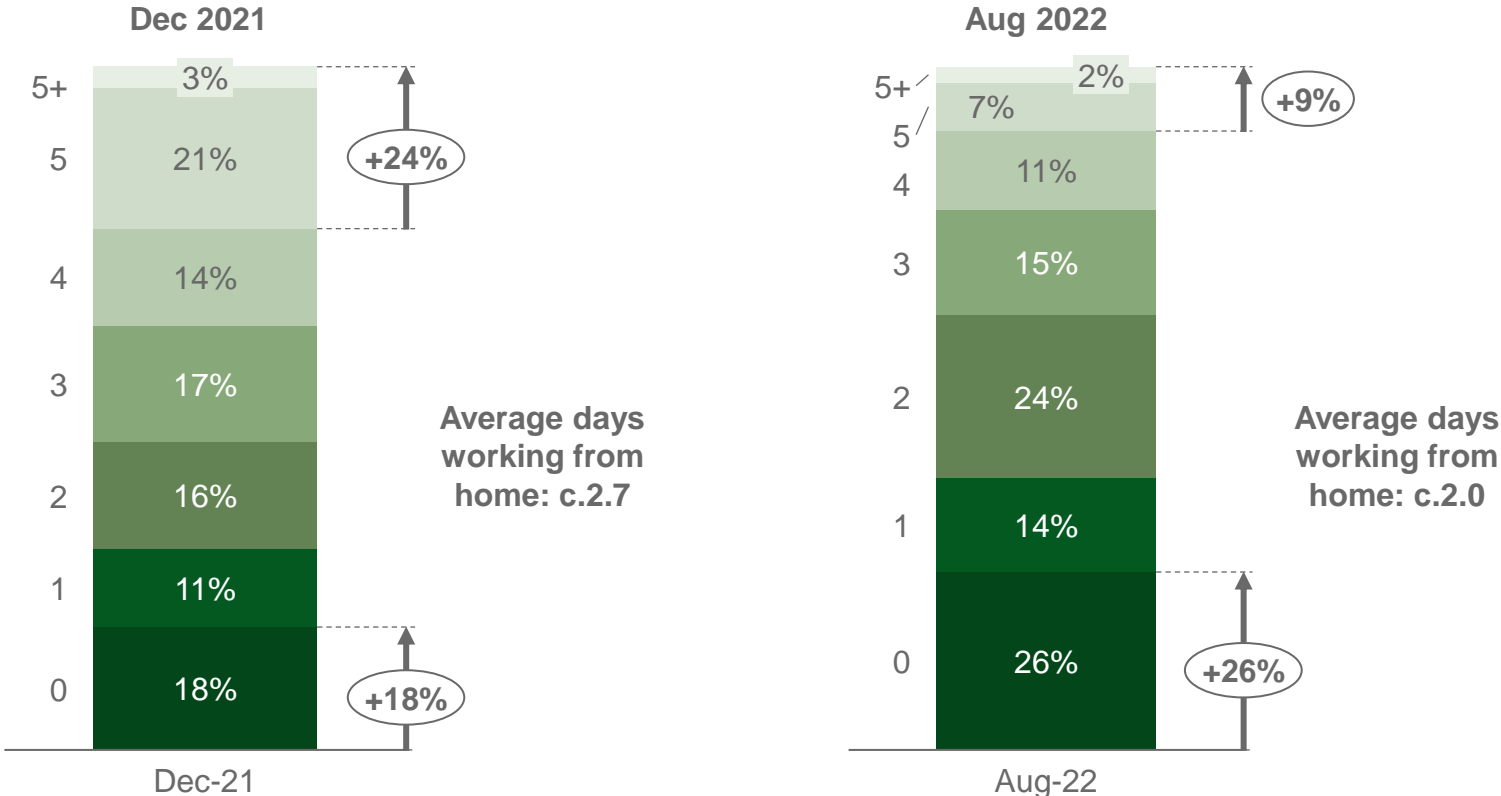
CHANGE IN AMOUNT WORKED FROM HOME FOR OFFICE WORKERS NOW VS PRE-PANDEMIC



Notes: December 2021 n = 350, August 2022 n = 679; Question: 'Have the number of days you work from home in an average week changed compared to before the Covid-19 pandemic?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

The average number of days worked from home has fallen by close to a day compared to Dec 2021

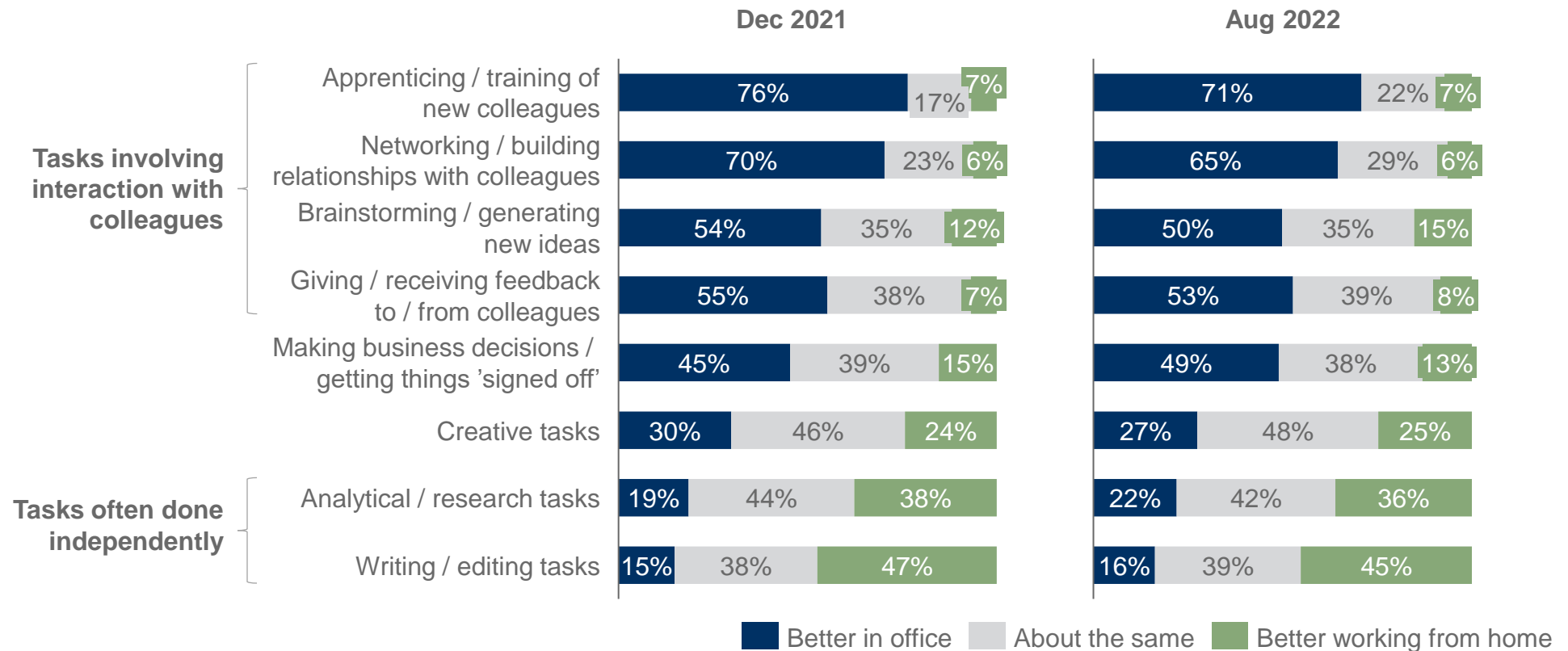
AVERAGE DAYS WORKED FROM HOME BY OFFICE WORKERS EACH WEEK



Notes: December 2021 n = 350, August 2022 n = 679; Question: 'In an average week, how many days do you work from home?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Office workers' views about which tasks are done better in the office vs at home remain unchanged, with a clear preference for 'interactive' tasks to be done in the office

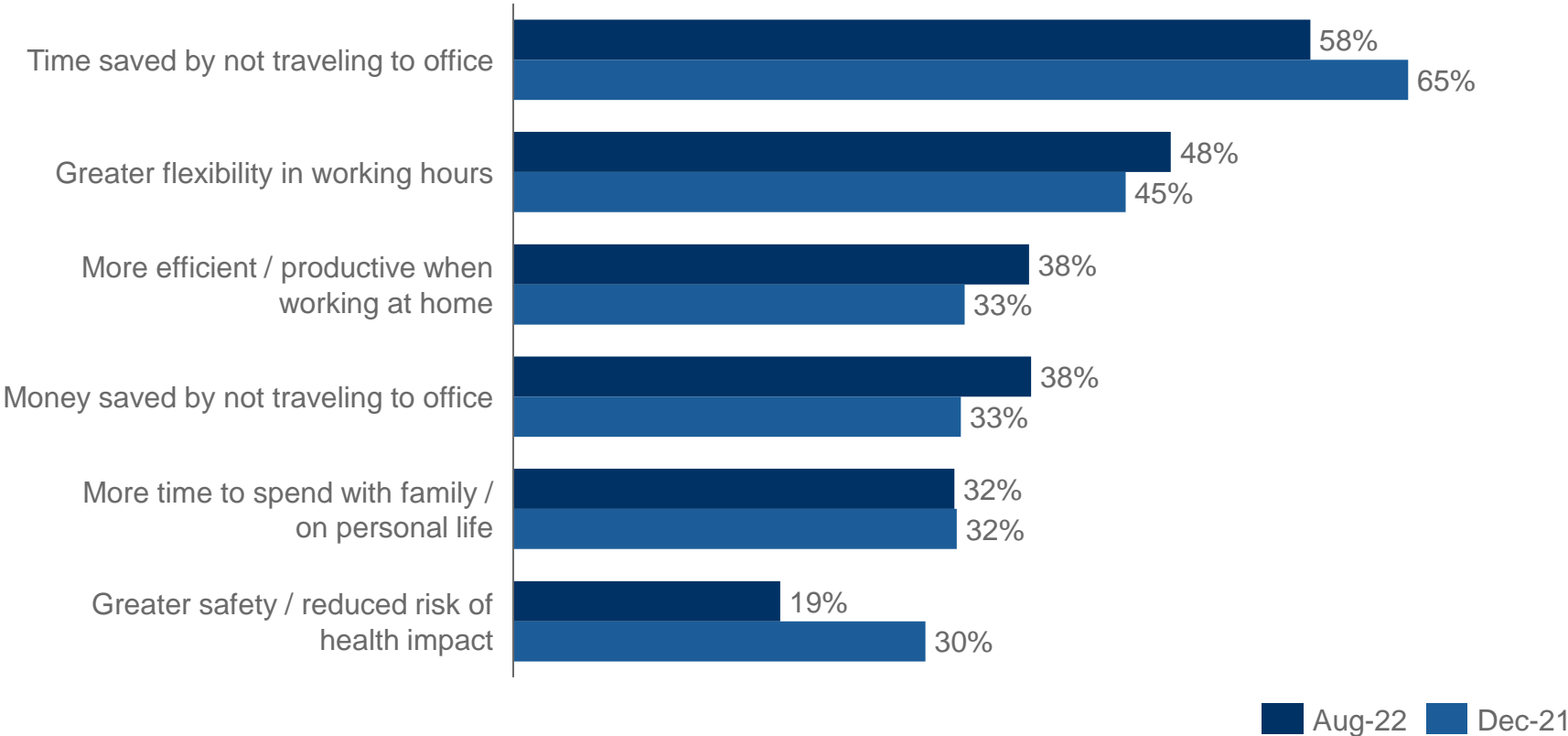
OFFICE WORKERS' PREFERENCES FOR TASKS TO BE DONE AT HOME OR IN THE OFFICE



Notes: December 2021 n = 350, August 2022 n = 679; Question: 'Which of the following do you think are better done at home and which are better in the office?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Saving time and increased flexibility in working hours continue to be viewed as the key benefits of homeworking; fewer respondents are concerned by the safety / health impact of office working than in Dec 2021

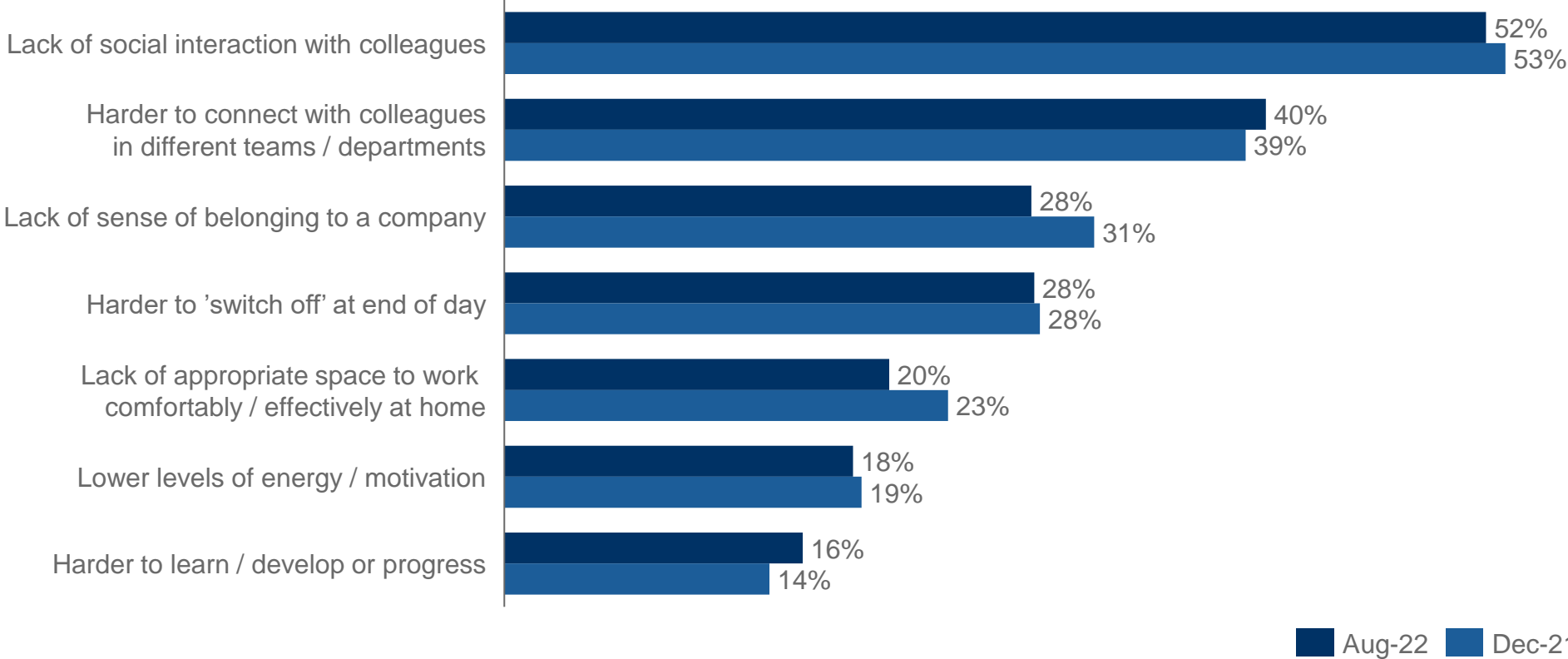
OFFICE WORKERS' PERCEIVED BENEFITS OF HOME WORKING



Notes: December 2021 n = 350, August 2022 n = 679; Question: 'Many people identify potential benefits from home working. What do you consider to be the top 3 benefits?'; Excludes those who answered 'I don't know / doesn't apply'
Source: Eden McCallum & Dynata surveys

Office workers continue to be concerned by the lack of social interaction and challenges connecting with colleagues when working from home

OFFICE WORKERS PERCEIVED NEGATIVES OF HOME WORKING

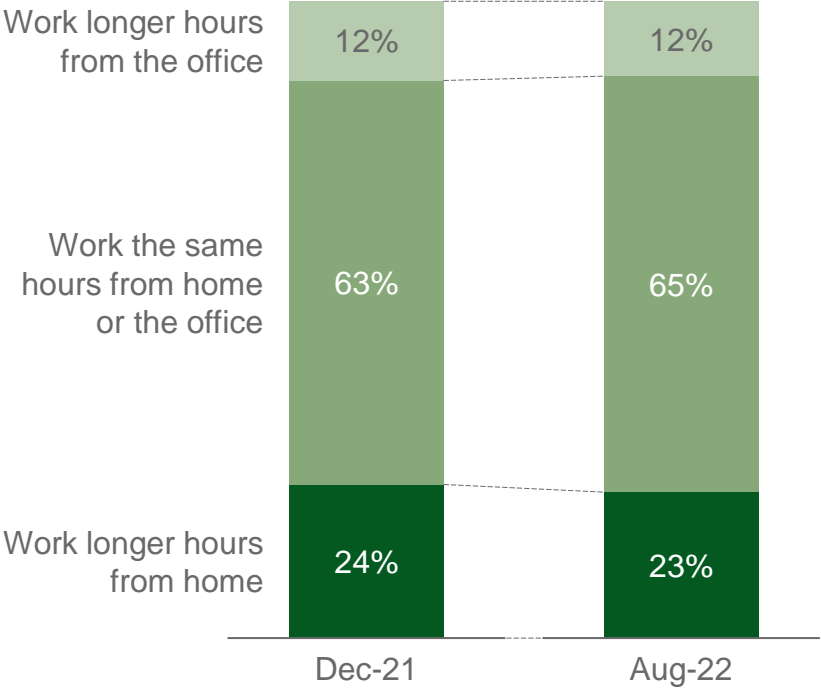


Notes: December 2021 n = 350, August 2022 n = 679; Question: *What do you consider to be the top 3 downsides?*; Excludes those who answered 'I don't know / doesn't apply'
Source: Eden McCallum & Dynata surveys

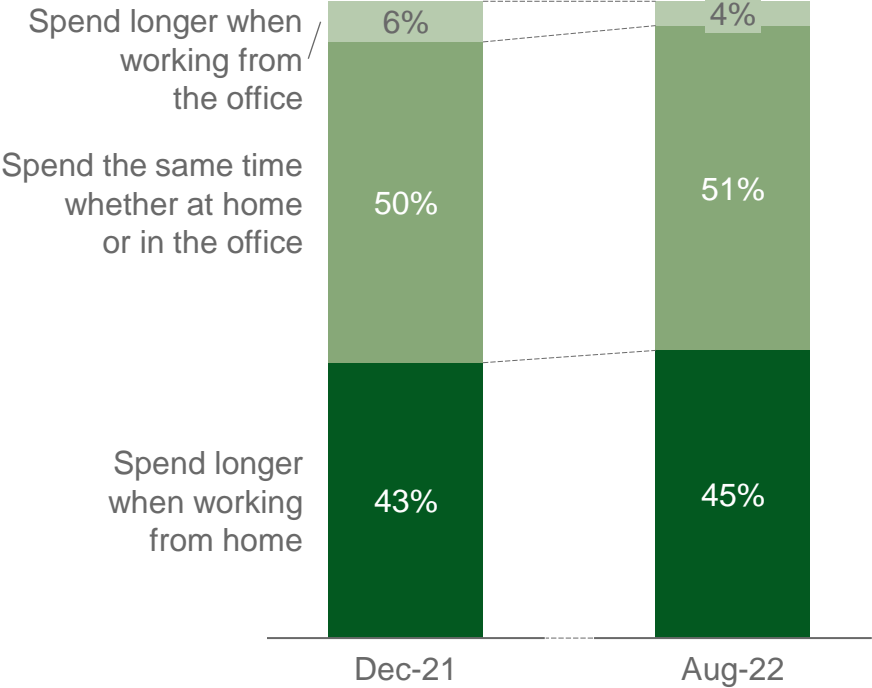
Almost half of respondents spend longer on domestic tasks when working from home; the majority report no change in the time they spend on work

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

Hours worked at home vs in the office



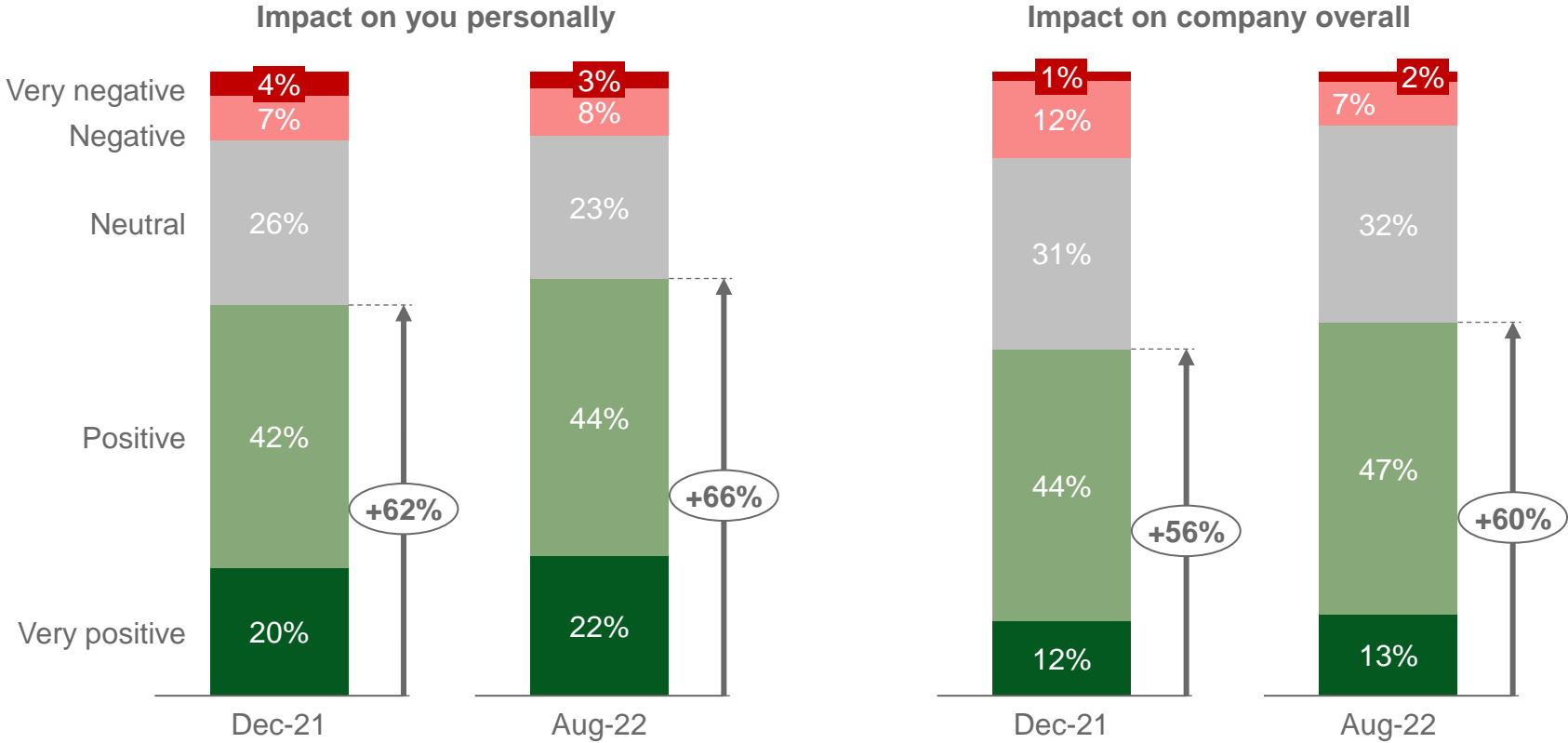
Hours spent on domestic tasks



Notes: December 2021 n = 350, August 2022 n = 679; Questions: 'How do your working hours compare on the days you work from home vs the days you are in the office?'; '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?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Respondents remain more positive about the impact of remote working on themselves than on their company overall

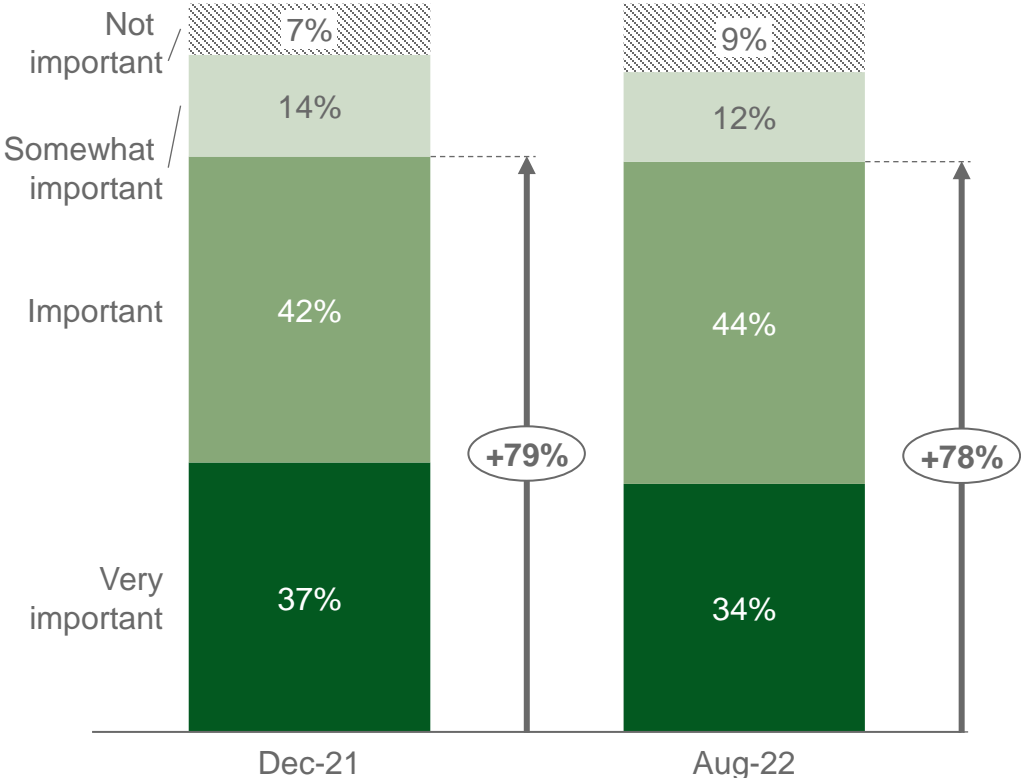
IMPACT OF REMOTE WORKING ON OFFICE WORKERS AND THEIR COMPANIES



Notes: December 2021 n = 350, August 2022 n = 679; Question: 'On balance, what do you think is / would be the overall impact of having the flexibility to work from home?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely
 Source: Eden McCallum & Dynata surveys

Hybrid working remains an important factor when looking for their next role for 3 in 4 office workers

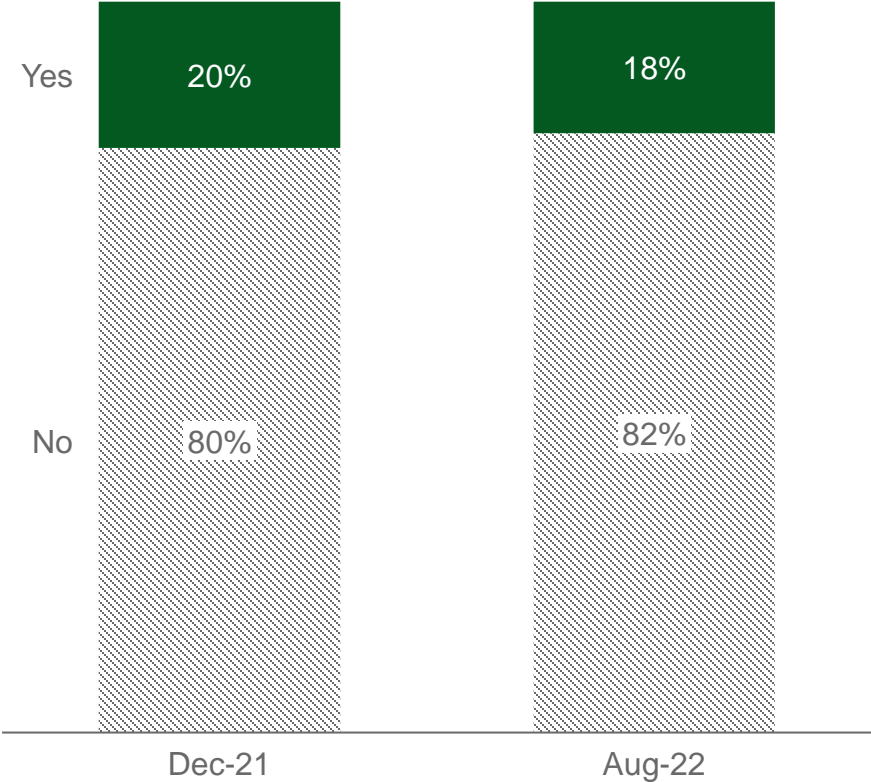
IMPORTANCE OF HYBRID WORKING FOR OFFICE WORKERS' NEXT ROLE



Notes: December 2021 n = 350, August 2022 n = 679; Question: '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?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Similar numbers of employees are now looking to enter the job market compared to 6 months ago

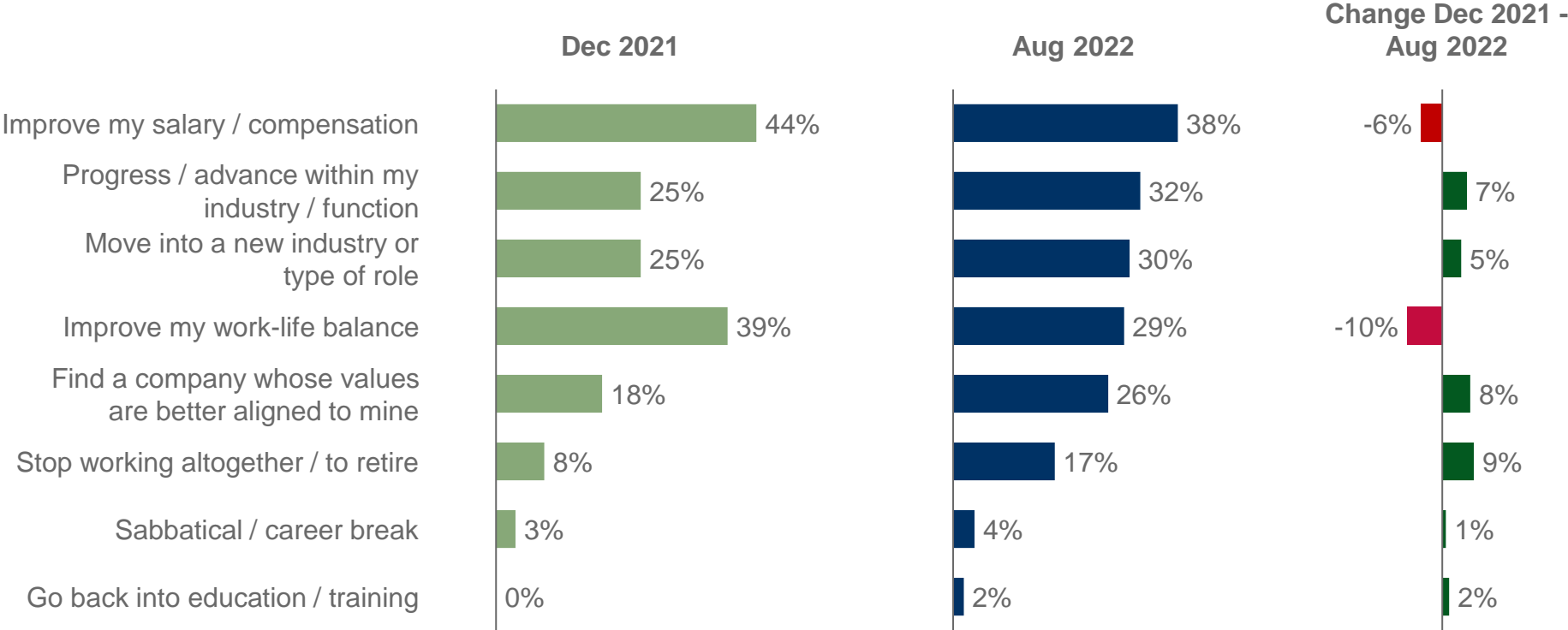
OFFICE WORKERS CONSIDERING LEAVING THEIR JOBS IN THE NEXT 6-12 MONTHS



Notes: December 2021 n = 350, August 2022 n = 679; Question: 'Are you considering leaving your job in the next 6-12 months?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Compensation and career progression are now key for workers considering leaving their jobs; finding a company whose values align to their own has increased in importance

OFFICE WORKERS' REASONS FOR CONSIDERING LEAVING THEIR JOB

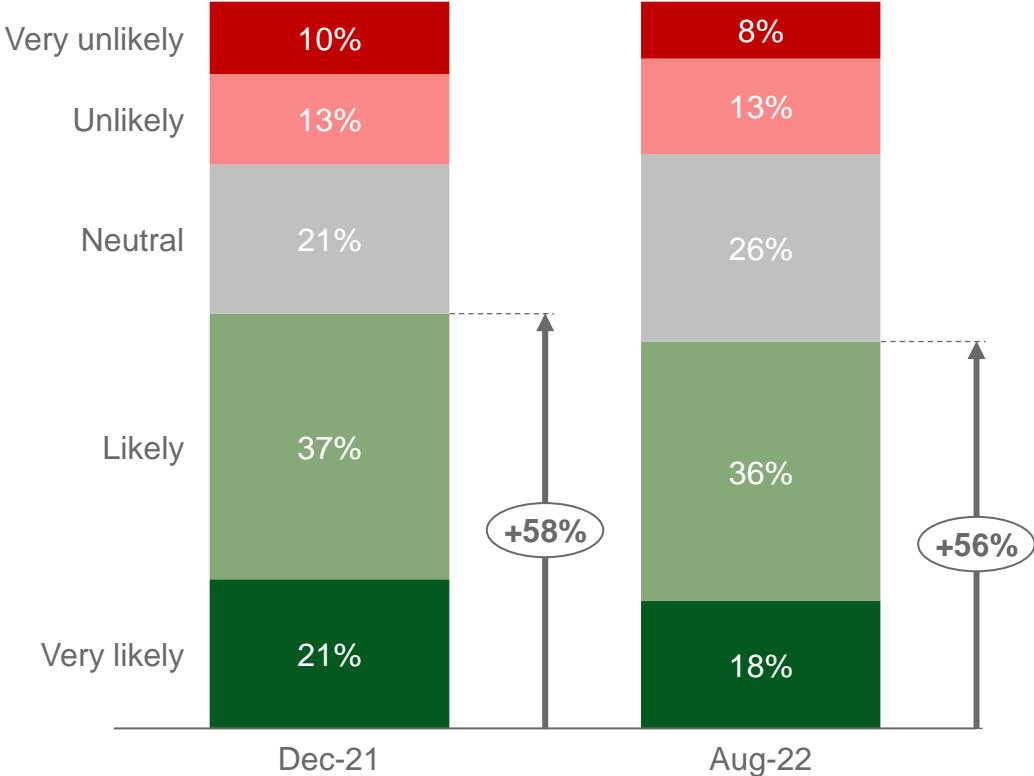


Notes: December 2021 n = 61, August 2022 n = 108; Question: 'Why are you considering leaving your job?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

c.60% of office workers would consider looking for work anywhere in the NL

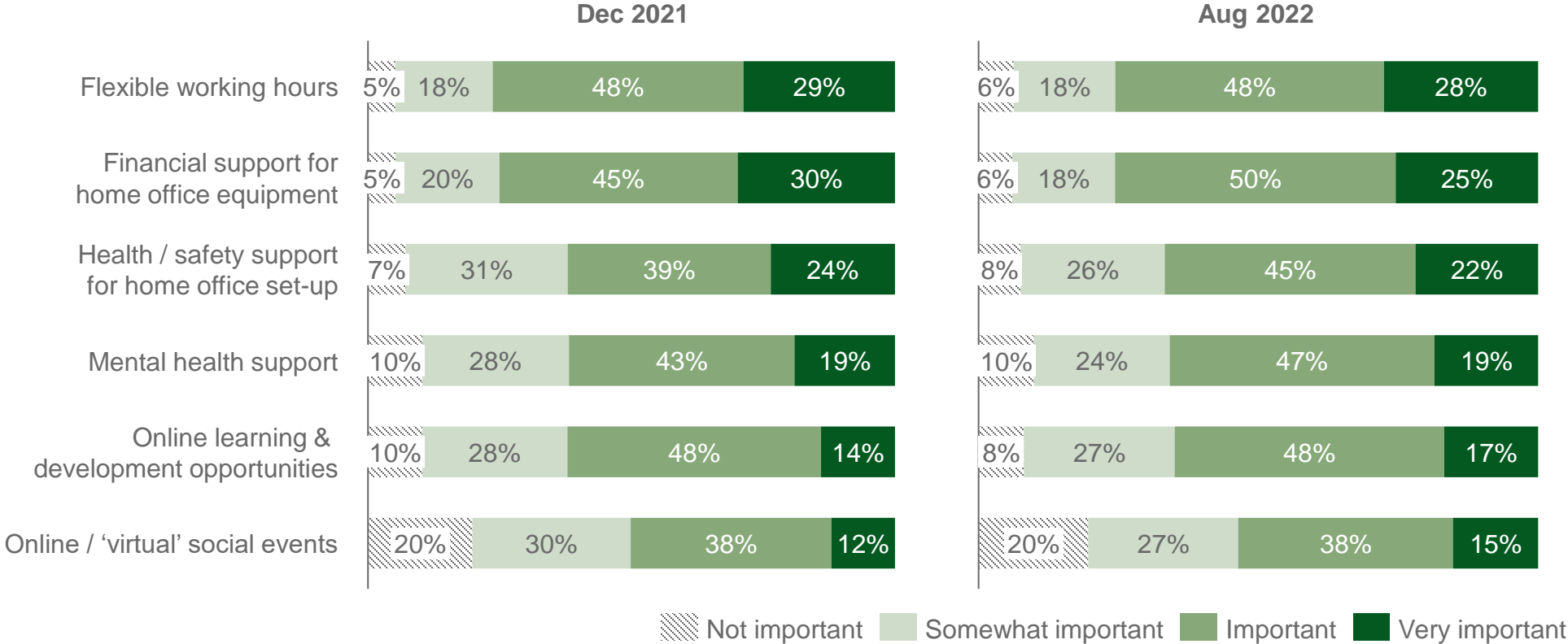
OFFICE WORKERS' WILLINGNESS TO WORK ANYWHERE IN THE NETHERLANDS WITH HYBRID WORKING OPTION



Notes: December 2021 n = 350, August 2022 n = 679; Question: 'When you next change your job, how likely would you be to consider looking for jobs anywhere in the country if they offer you the flexibility to work from home at least some of the time?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

All forms of support continue to be valued by office workers, particularly flexible working and financial support for home working

IMPORTANCE OF EMPLOYERS MEASURES THAT ARE IN PLACE FOR OFFICE WORKERS WORKING FROM HOME



Notes: December 2021 n = 350, August 2022 n = 679; Question: 'How important do you think it is that your employer offers these measures to support people working from home?'; Excludes those who answered 'I don't know / doesn't apply'; Due to rounding percentages may not sum precisely
 Source: Eden McCallum & Dynata surveys

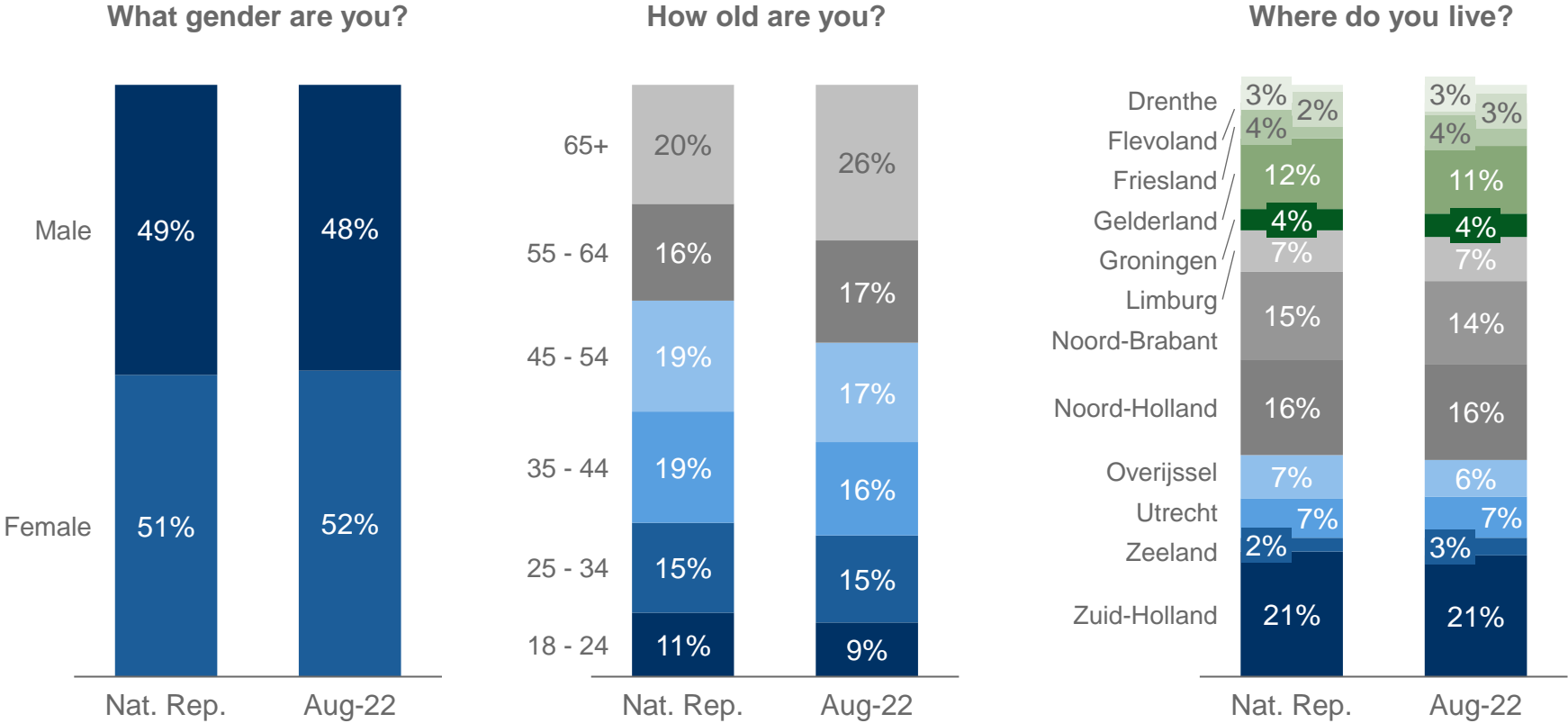
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Sample demographics

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

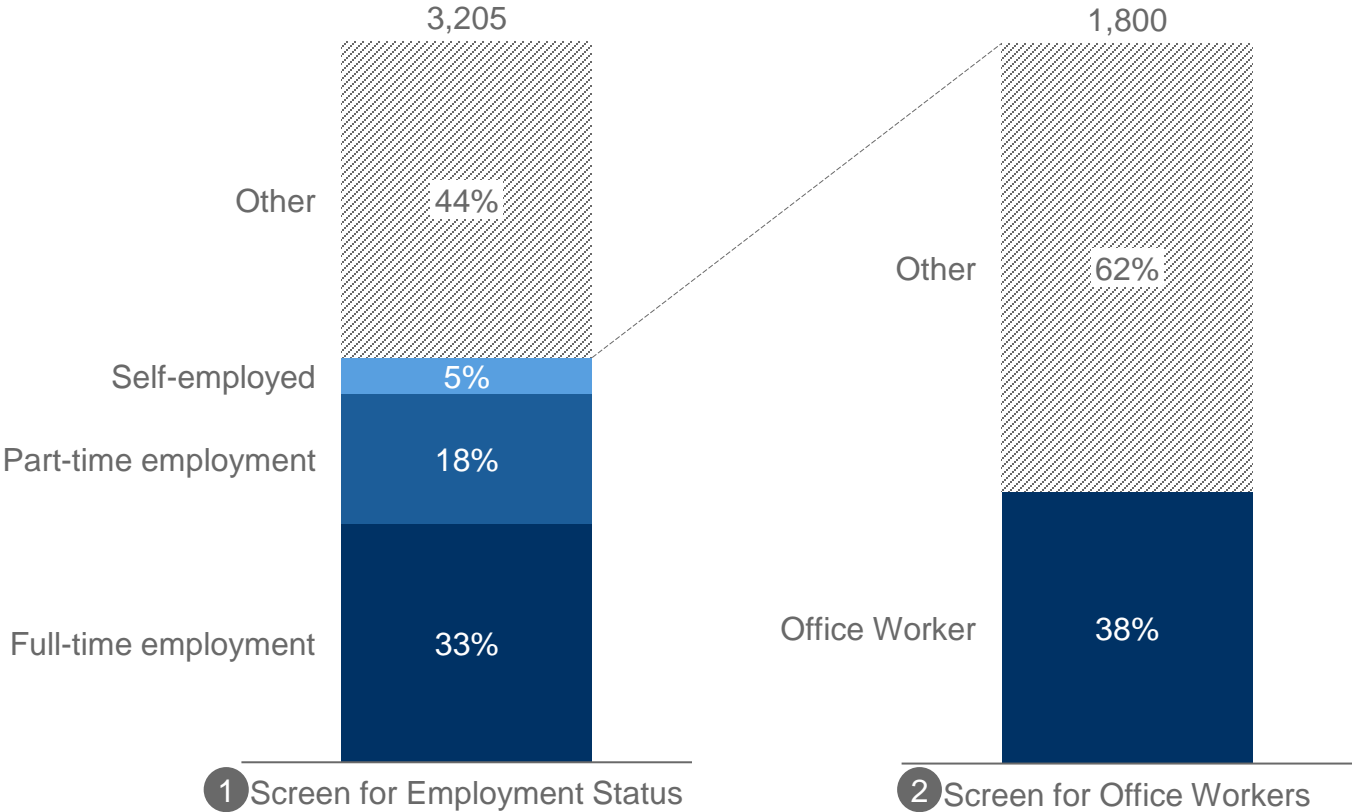
KEY FACTS ABOUT THE NETHERLANDS SAMPLE



Note: n = 3,205; Questions: 'What gender do you identify as?'; 'How old are you?'; 'Where do you live?'; Due to rounding percentages may not sum precisely
 Source: Eden McCallum & Dynata surveys

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

SCREENING OF DUTCH RESPONDENTS

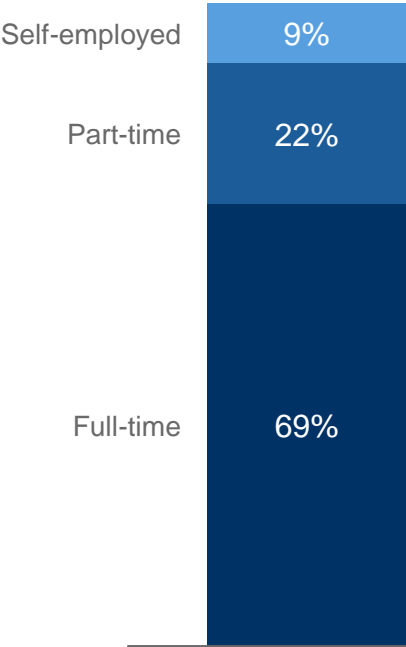


Note: n = 3,205; Question: 'How would you describe your employment status'; 'How would you describe the type of location you would normally spend most of your time working in?'; Excludes those who answered 'I don't know / doesn't apply' and / or 'Prefer not to say'; Due to rounding percentages may not sum precisely
Source: EM Consumer Research Survey August 2022

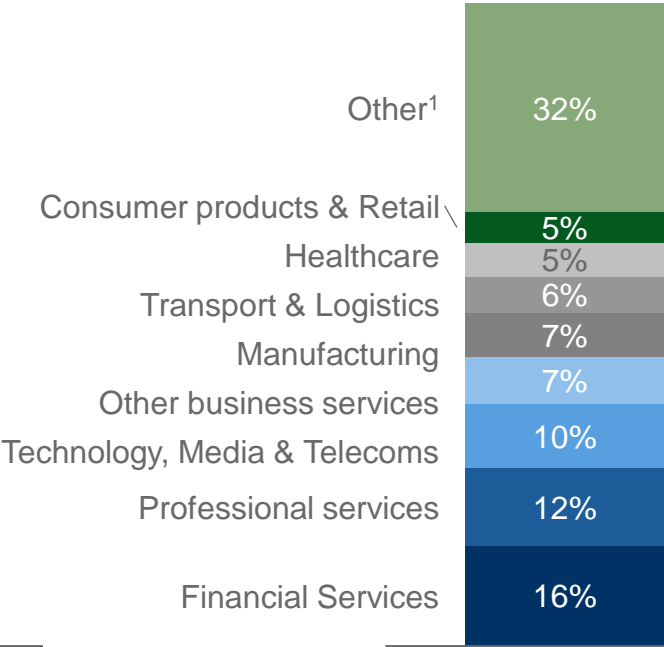
The office workers screened from the sample work in a broad range of industries and companies of varying sizes

NL WAYS OF WORKING: OFFICE WORKERS

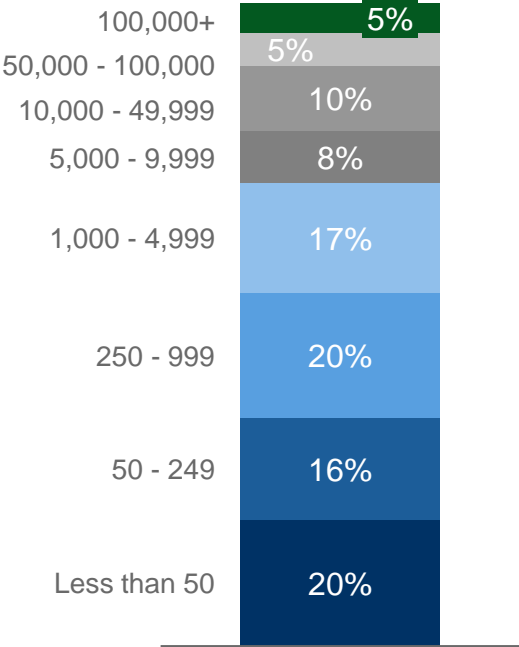
Employment status



Company's sector



Company size: number of employees



Notes: 'Other' includes Construction & Real Estate; Transport & Logistics; Travel, Tourism & Leisure; Automotive, Agriculture, Utilities, Oil & Gas; and Mining; Questions: 'How would you describe your employment status?'; 'What is your company's main line of business?'; 'How many people does your company employ in all of its locations?'; Excludes those who answered 'I don't know' / 'Prefer not to say'; Due to rounding percentages may not sum precisely
 Source: EM Consumer Research Survey August 2022; n = 679