The impact of home working on employee experience

Employees, their employers, their consultants, advisors and service providers are all caught between a ‘rock and a hard place’ in a battle of home vs office.
The Leesman Office Workplace Experience Index

A singular mission: To arm organisations with data stories that help them create outstanding workplace ecosystems that brilliantly support their colleagues, inspire teams and help businesses thrive.

801,700+
individual employee responses

5,250+
global workplaces assessed

15,000,000
approx. sq meters of corporate real estate

103
countries represented, surveyed in 37 languages

@LeesmanCEO  @Leesman_Index
Workplace radiographers at the office and at home

Our standardised solutions allow organisations across both private and public sectors to independently appraise all the moving parts of the workplace ecosystem.

New home working experience tool launched in March

145,078 individual home working employee responses

1385 global workplace populations assessed

83 countries represented
New home working experience tool launched in March

145,078 individual home working employee responses
1385 global workplace populations assessed
83 countries represented

Research data used today based on a sample of 126,969 employee responses as at 26/8/2020
Is home working working?
Business drivers

82.2%
My home environment enables me to work productively
N= 126,969 as at 26/8/2020

62.8%
My workplace enables me to work productively
N= 749,737 at Q2/2020

↑ 19.4%
13,329 respondents who answered regarding the office AND their home working experience.
great home experience

57%
Lmi vs H-Lmi - Individual level comparison

55%

great office experience
sub-optimal home & office experience

great home & office experience

25%

37%
sub-optimal home & office experience

improve the office

improve the home

37% great home & office experience

25% no compelling reason to choose between the office or home
The impact of employee experience on performance

Board rooms may be empty, but workplace is top of board agendas around the world. And the board wants data. It wants to know the scale of opportunity and the scale of risk.
<table>
<thead>
<tr>
<th>Speaker</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guy Osmond</td>
<td>Ergonomics, human factors and worker profiles</td>
</tr>
<tr>
<td>Simon Joyston-Bechal</td>
<td>COVID imposed H&amp;S implications and duties</td>
</tr>
<tr>
<td>Marcus Bowen</td>
<td>Digital transformations and workplace economics</td>
</tr>
<tr>
<td>Marie Puybaraud &amp; Nigel Oseland</td>
<td>The end of the office as we know it</td>
</tr>
<tr>
<td>Jack Harvie-Clark</td>
<td>Open plan office acoustics</td>
</tr>
<tr>
<td>Sarwat Tasneem</td>
<td>Workplace that values employee Wellbeing</td>
</tr>
<tr>
<td>Ian Baker</td>
<td>Creative measures to protect your employees</td>
</tr>
<tr>
<td>Neil Usher</td>
<td>The power of change</td>
</tr>
</tbody>
</table>
1. Ergonomics, human factors and worker profiles
A dedicated work room or office: 40%
A dedicated work area (but not separate room): 31%
A non-specific home location (e.g. dining table): 29%

N=126,969 as at 26/8/2020

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<table>
<thead>
<tr>
<th>Condition</th>
<th>A dedicated work room or office</th>
<th>A dedicated work area (but not a separate room)</th>
<th>A non-work specific home location (such as a dining table)</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have access to all of the software applications/programs I need to work from home</td>
<td>92.2%</td>
<td>90.4%</td>
<td>86.3%</td>
<td>-5.9%</td>
</tr>
<tr>
<td>When I work from home, I have access to all of the information needed for the work that I do</td>
<td>89.1%</td>
<td>85.9%</td>
<td>77.8%</td>
<td>-11.3%</td>
</tr>
<tr>
<td>My home environment enables me to work productively</td>
<td>91.6%</td>
<td>84.1%</td>
<td>68.5%</td>
<td>-23.1%</td>
</tr>
<tr>
<td>I have access to all of the IT devices and tools I need to work from home</td>
<td>86.0%</td>
<td>82.0%</td>
<td>72.2%</td>
<td>-13.8%</td>
</tr>
<tr>
<td>When I work from home, I am able to share ideas / knowledge amongst colleagues</td>
<td>84.6%</td>
<td>79.9%</td>
<td>69.3%</td>
<td>-15.3%</td>
</tr>
<tr>
<td>The physical settings I use when working from home are suitable for the work that I do</td>
<td>89.3%</td>
<td>79.6%</td>
<td>56.0%</td>
<td>-33.3%</td>
</tr>
<tr>
<td>When I work from home, I’m able to be physically active</td>
<td>80.1%</td>
<td>74.7%</td>
<td>64.3%</td>
<td>-15.8%</td>
</tr>
<tr>
<td>When I work from home, I am able to maintain a healthy work-life balance</td>
<td>79.8%</td>
<td>73.6%</td>
<td>62.3%</td>
<td>-17.5%</td>
</tr>
<tr>
<td>When I work from home, I feel connected to my organisation</td>
<td>77.1%</td>
<td>72.0%</td>
<td>60.0%</td>
<td>-17.1%</td>
</tr>
<tr>
<td>When I work from home, I feel connected to my colleagues</td>
<td>73.1%</td>
<td>67.5%</td>
<td>54.7%</td>
<td>-18.4%</td>
</tr>
</tbody>
</table>
Pre COVID: Office data N=719,789 as at Q4/2019,
Post COVID: Home working data N=126,969 as at 26/8/2020
The home work setting available to employees is the strongest statistical predictor of home working experience
Those using a non work-specific setting are the most likely to elect to return to the workplace for the majority or all of their working week.
2. COVID imposed H&S
1-5 activities
- Individual focused work, desk based
- Planned meetings
- Telephone conversations
- Informal, un-planned meetings
- Collaborating on focused work
- Relaxing/taking a break
- Reading
- Audio conferences
- Individual routine tasks
- Informal social interaction
- Thinking/creative thinking
- Learning from others
- Private conversations
- Business confidential discussions
- Collaborating on creative work
- Hosting visitors, clients or customers
- Video conferences
- Larger group meetings or audiences
- Spreading out paper or materials
- Individual focused work away from your desk
- Using technical/specialist equipment or materials

6-10 activities

11-15 activities

16-21 activities

The more activities an employee selects as important, the more they want to return to the office.
Individual focused work, desk based
Planned meetings
Telephone conversations
Informal, un-planned meetings
Collaborating on focused work
Relaxing/taking a break
Reading
Audio conferences
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Informal social interaction
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N=126,969 as at 26/8/2020
Individual focused work, desk based
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Individual focused work away from your desk
Using technical/specialist equipment or materials

1-5 activities: 24% of respondents
6-10 activities: 41% of respondents
11-15 activities: 22% of respondents
16-21 activities: 13% of respondents

N=126,969 as at 26/8/2020
Activities support - Office vs Home

- Hosting visitors, clients or customers
- Informal social interaction
- Learning from others
- Using technical/specialist equipment or materials
- Collaborating on creative work
- Informal, un-planned meetings
- Collaborating on focused work
- Individual focused work away from your desk
- Planned meetings
- Individual routine tasks
- Spreading out paper or materials
- Individual focused work, desk based
- Relaxing/taking a break
- Audio conferences
- Video conferences
- Business confidential discussions
- Private conversations
- Telephone conversations
- Thinking/creative thinking
- Reading

**better in the office**

**better in the home**
The things the office does best are the very things that present the greatest bio safety risks.
3. Digital transformation and costs recovery
Client A. Preferred # of days per week working from….

- **Home**: 73% 3 or more days / week home based
  - 23%: 5 days
  - 20%: 4 days
  - 30%: 3 days

- **Office**: 27% 3 or more days / week office based
  - 19%: 2 days
  - 5%: 1 day
  - 3%: 0 days
Client B. Preferred # of days per week working from....

<table>
<thead>
<tr>
<th></th>
<th>Home</th>
<th>Office</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>66%</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

- **Home**: 66% of the respondents prefer to work from home, 30% prefer 3 days, and 18% prefer 4 days. 18% prefer 5 days.
- **Office**: 34% of the respondents prefer to work from home, 19% prefer 2 days, 9% prefer 3 days, and 9% prefer 4 days.
Client B. Preferred # of days per week working from….

Office

+1d/w
+2d/w
+3d/w
+4d/w
5d/w

M
18%
30%
19%
9%
9%

T
30%
19%
9%
9%
9%

W
19%
9%
9%
9%
9%

T

F
9%

76% difference between office occupancy / load levels
Client B. Preferred #days per week working from….

- mandated

Office

-50%

+1d/w
+2d/w
+3d/w
+4d/w
5d/w
Client B. Preferred #days per week working from....

- 5d/w
- +4d/w
- +3d/w
- +2d/w
- +1d/w
- 5d/w
Organisations want to give empowered employees choices. But how much choice can they offer when human nature plays its hand?
Trust has been granted, you can’t simply snatch it back
4. End of the office as we know it
Business outcomes

82.2%
My home environment enables me to work productively
N= 126,969 as at 26/8/2020

62.8%
My workplace enables me to work productively
N= 749,737 at Q2/2020

↑ 19.4%
Business outcomes

82.2%
My home environment enables me to work productively
N= 126,969 as at 26/8/2020

↑ 3.9%

Leesman+
78.3%
My workplace enables me to work productively
N= 51,128 at Q2/2020

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Leesman+ certification

The world’s best workplaces 2019
Unpacking lessons from the top
<table>
<thead>
<tr>
<th>Organisation</th>
<th>Sector</th>
<th>Location</th>
<th>Lmi</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>BHP</td>
<td>Mining &amp; Metals</td>
<td>Philippines</td>
<td>89.6*</td>
<td>●</td>
</tr>
<tr>
<td>Honeywell</td>
<td>Electrical/Electronic Manufacturing</td>
<td>China</td>
<td>84.8</td>
<td>●</td>
</tr>
<tr>
<td>Rapid7</td>
<td>Computer &amp; Network Security</td>
<td>United States</td>
<td>84.0</td>
<td>●</td>
</tr>
<tr>
<td>Commonwealth Bank of Australia (CBA)</td>
<td>Banking</td>
<td>Australia</td>
<td>81.9</td>
<td>●</td>
</tr>
<tr>
<td>Edge Technologies</td>
<td>Commercial Real Estate</td>
<td>Netherlands</td>
<td>81.7</td>
<td>●</td>
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<tr>
<td>Goldman Sachs</td>
<td>Financial Services</td>
<td>India</td>
<td>81.6</td>
<td>●</td>
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<tr>
<td>Rapid7</td>
<td>Computer &amp; Network Security</td>
<td>United States</td>
<td>81.5</td>
<td>●</td>
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<tr>
<td>Danske Bank</td>
<td>Banking</td>
<td>Lithuania</td>
<td>79.8</td>
<td>●</td>
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<tr>
<td>Perkins+Will</td>
<td>Architecture &amp; Planning</td>
<td>Canada</td>
<td>79.7</td>
<td>●</td>
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<tr>
<td>Goldman Sachs</td>
<td>Financial Services</td>
<td>China</td>
<td>79.0</td>
<td>●</td>
</tr>
<tr>
<td>Hixon</td>
<td>Architecture &amp; Planning</td>
<td>United States</td>
<td>78.4</td>
<td>●</td>
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<tr>
<td>Arup</td>
<td>Design</td>
<td>Australia</td>
<td>78.3</td>
<td>●</td>
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<tr>
<td>Boston Consulting Group (BCG)</td>
<td>Management Consulting</td>
<td>United States</td>
<td>78.2</td>
<td>●</td>
</tr>
<tr>
<td>Johnson &amp; Johnson</td>
<td>Pharmaceuticals</td>
<td>China</td>
<td>77.0</td>
<td>●</td>
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<tr>
<td>BHP</td>
<td>Mining &amp; Metals</td>
<td>Malaysia</td>
<td>76.8</td>
<td>●</td>
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<tr>
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<td>76.3</td>
<td>●</td>
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<tr>
<td>Grupo Construccion</td>
<td>Construction</td>
<td>Spain</td>
<td>76.3</td>
<td>●</td>
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<tr>
<td>Red Energy</td>
<td>Utilities</td>
<td>Australia</td>
<td>75.6</td>
<td>●</td>
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<tr>
<td>Danske Bank</td>
<td>Banking</td>
<td>Lithuania</td>
<td>75.1</td>
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<tr>
<td>Honeywell</td>
<td>Electrical/Electronic Manufacturing</td>
<td>Malaysia</td>
<td>74.5</td>
<td>●</td>
</tr>
<tr>
<td>Lendlease</td>
<td>Construction</td>
<td>Australia</td>
<td>74.1</td>
<td>●</td>
</tr>
<tr>
<td>Woodside Energy</td>
<td>Oil &amp; Energy</td>
<td>Australia</td>
<td>73.2</td>
<td>●</td>
</tr>
<tr>
<td>ICA</td>
<td>Retail</td>
<td>Sweden</td>
<td>72.9</td>
<td>●</td>
</tr>
<tr>
<td>Johnson &amp; Johnson</td>
<td>Pharmaceuticals</td>
<td>Czech Republic</td>
<td>72.7</td>
<td>●</td>
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<tr>
<td>Johnson &amp; Johnson</td>
<td>Pharmaceuticals</td>
<td>Philippines</td>
<td>72.3</td>
<td>●</td>
</tr>
<tr>
<td>Johnson &amp; Johnson</td>
<td>Pharmaceuticals</td>
<td>South Korea</td>
<td>72.1</td>
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<tr>
<td>Goldman Sachs</td>
<td>Financial Services</td>
<td>United Kingdom</td>
<td>71.7</td>
<td>●</td>
</tr>
<tr>
<td>Wärtsilä</td>
<td>Maritime</td>
<td>Finland</td>
<td>71.6</td>
<td>●</td>
</tr>
<tr>
<td>Philip Morris International</td>
<td>Tobacco</td>
<td>South Africa</td>
<td>71.4</td>
<td>●</td>
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<tr>
<td>Johnson &amp; Johnson</td>
<td>Pharmaceuticals</td>
<td>Italy</td>
<td>70.7</td>
<td>●</td>
</tr>
<tr>
<td>Ford</td>
<td>Automotive</td>
<td>India</td>
<td>70.1</td>
<td>●</td>
</tr>
<tr>
<td>Jordbruksverket</td>
<td>Government Administration</td>
<td>Sweden</td>
<td>70.1</td>
<td>●</td>
</tr>
</tbody>
</table>

*Highest performing Leesman+ certified workplaces to date
Data reported at 31.12.2019
BHP
August 2019

89.6 Lmi

Manila, Philippines

Productivity Agreement = 97.9%

Telephone conversations = 100%

Business confidential discussions = 100%
Getting there is one thing, staying there is another
Organisations need workplaces that stay in step with organisations every day, not once every 10-years.
5. Office acoustics
2019 Leesman+ assigned vs flexible

Noise levels
- Designated: 33.0%
- Flexible: 49.5%

Temperature control
- Designated: 41.2%
- Flexible: 49.6%

Air quality
- Designated: 62.5%
- Flexible: 71.5%

Natural light
- Designated: 66.7%
- Flexible: 80.3%
Any activity that benefits from acoustic privacy is better supported at home
6. Employee wellbeing
I have access to all of the software applications/programs I need to work from home

When I work from home, I have access to all of the information needed for the work that I do

My home environment enables me to work productively

I have access to all of the IT devices and tools I need to work from home

When I work from home, I am able to share ideas/knowledge amongst colleagues

The physical settings I use when working from home are suitable for the work that I do

When I work from home, I am able to be physically active

When I work from home, I am able to maintain a healthy work-life balance

When I work from home, I feel connected to my organisation

When I work from home, I feel connected to my colleagues

Disagree Strongly Disagree Disagree Slightly Neutral Agree Slightly Agree Agree Strongly

% Agreement

89.6%
84.5%
82.2%
80.4%
78.4%
76.1%
73.5%
72.5%
70.3%
65.8%

N=126,969 as at 26/8/2020
Organisational impact

Highest scoring org.
H-Lmi 82.5

Lowest scoring org.
H-Lmi 52.0

H-Lmi 74.2
<table>
<thead>
<tr>
<th>H-Lmi</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>≥80.0</td>
<td>44%</td>
</tr>
<tr>
<td>70.0-79.9</td>
<td>20%</td>
</tr>
<tr>
<td>60.0-69.9</td>
<td>15%</td>
</tr>
<tr>
<td>&lt;60.0</td>
<td>21%</td>
</tr>
</tbody>
</table>

Organisational impact

H-Lmi 74.2

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N=126,969 as at 26/8/2020
## Gap in scores between organisations

<table>
<thead>
<tr>
<th>Small</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to information</td>
<td>Sharing knowledge</td>
</tr>
<tr>
<td>Productivity</td>
<td>Feeling connected</td>
</tr>
<tr>
<td>Individual focused work</td>
<td>Collaboration</td>
</tr>
<tr>
<td>Planned meetings</td>
<td>Informal, unplanned meetings</td>
</tr>
<tr>
<td>Video conferences</td>
<td>Informal social interaction</td>
</tr>
</tbody>
</table>
Roles types supported differently

Process driven
Cyclical
Administrative
Structured
Benefit from privacy

Complex problem solving
Iterative / less structured
Creative
Highly collaborative
Benefit from energy / buzz
Sentiment drift is happening. And we believe unchecked, it will impact the social fabric of an organisation
7. Creative measures to protect your employees
Experience drivers

Individual focused work desk based
Learning from others
Relaxing / taking a break
Thinking / creative thinking
Planned meetings
General tidiness
Toilets / WCs
Tea, coffee & refreshment facilities

Sentiment super-drivers
Facilities Management must be acutely aware of the heightened sensitivity around key sentiment drivers
Facilities Management must be acutely aware of the heightened sensitivity around key sentiment drivers.
Activity complexity & role

Age, gender, etc.
Activity complexity & role

Age, gender, etc.

Office work setting

Home work setting
Activity complexity & role

Age, gender, etc.

Office work setting

EwX

Home work setting
FM has spent the last 10-years distancing itself from cleaning services, suddenly it wants it back. But what is waiting for the brand of FM post-pandemic
8. The power of change
More innovation in the next 12-months than in the last 12-years
fail fast
failure vs success
1. On average, employees’ home working experience is good – but not for everyone, and not for everything

2. Deeper understanding of employee roles is helping organisations strategically plan both office re-entry and their ‘new order’ offices

3. The optimal distributed strategy must start with understanding how employees experience all the spaces available to them

4. Beware of “sentiment drift” and stay very very connected to your employee experience. You may need new ways to monitor