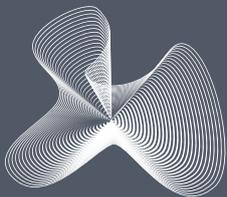




worksona™
Insights 2022

February 2022



worksona
Workspace Analytics & Personas

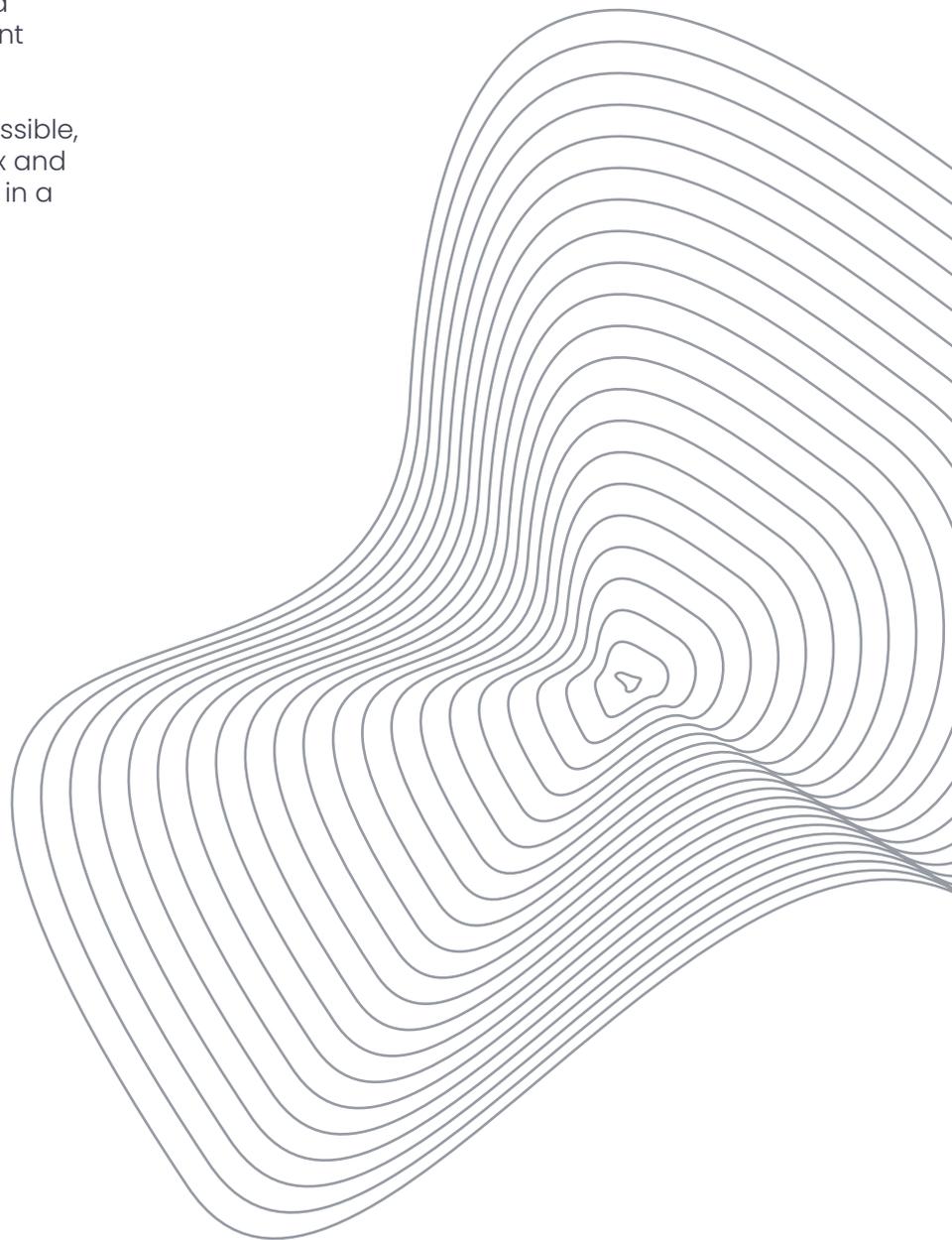
by @bendelta

Introduction

This report has been developed to support the launch of worksona™, an Australia-first workspace analytics tool that enables data-driven, people-focused decisions about hybrid working models.

Between August 2021 and January 2022, more than 1,000 employees were surveyed from leading businesses, including (but not limited to) BPAY, Foxtel and Ashurst. The survey was structured around the three dimensions of work – the Human, Physical and Digital Experience – with the results generating unique insights about the new generation of employee's behaviours and experiences.

Stringent scientific and integrity criteria were adhered to, preserving respondent anonymity and upholding statistical significance criteria. This ensured that insights are as reliable and valid as possible, allowing us to tell some of the complex and diverse stories within the world of work in a meaningful, impactful way.



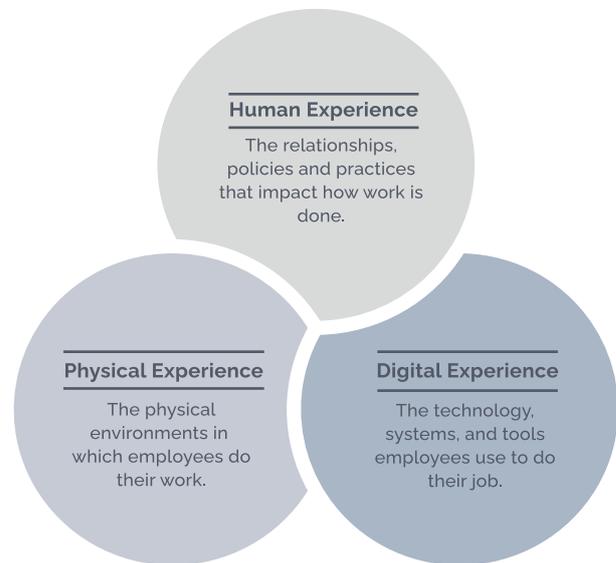
About worksona™

What is worksona™

Designed by industry-leading organisational psychologists and workplace strategists, worksona™ is the first Australian workspace analytics offering of its kind.

The insights from worksona™ empower leaders to make data-driven and people-focused decisions about hybrid working models, the role of the office, refreshing the employee value proposition, and digital experience and culture.

worksona™ investigates three dimensions of work – the Human, Physical and Digital Experience – using a 20-minute online assessment tool. Combining our expertise in organisational psychology with scientifically robust analytical models and decades of industry experience, worksona™ provides leaders with unique and reliable insights into their organisation's workspace profile.



Sample characteristics

1,085 employees across 16 countries have completed worksona™, drawn from a range of organisations across the financial advisory, media, professional services, law, and property sectors.

- Most responses are from full-time employees, with **10%** being part-time and **2%** being contractors
- Over **60%** of the sample identified as female, **40%** as male, and fewer than **1%** identifying otherwise
- Respondents had a broad range of ages, with most (**33%**) being aged 30 to 39 years old
- **64%** were onboarded entirely in person, **15%** were entirely virtually
- **61%** were individual contributors, while **39%** had some management responsibility
- **56%** were client-facing, **30%** were not
- where respondents do commute to work, **34%** travel more than 1 hour one-way
- **40%** had less than 2 years' tenure, **29%** had between 2-5 years' tenure

Assumptions, caveats, and limitations

- All findings within this report are provided in a general sense and are not specific advice for any individual organisation. While every effort has been taken to ensure their reliability, validity, and appropriateness, all decisions regarding organisations and individuals should be made with reference to their specific context.
- The >1,000 respondents represent employees from businesses who agreed to participate in Bendelta's worksona™ survey.

A snapshot

The Five Personas: A New Generation of Employees

Across the more than 258,000 data points, consistencies emerged regarding the unique mix of an employee's experience with remote working, their capacity to collaborate from home versus the office, their receptiveness to new office policies, and the impact of hybrid working on their work-life balance.

It became evident that respondents aligned largely (if not entirely) with one of five Personas – which we have titled the **Nomads**, the **Stoics**, the **Nesters**, the **Adapters** and the **Connectors**.

These Personas, explained in detail [here](#), capture a new generation of employees. These are people who have not only experienced fundamental changes to their required ways of working, but also to their preferred ways of working, because they are the first generation to have experienced such extreme levels of flexibility (both imposed and independently adopted by leaders).

Summary of worksona™ Insights

In addition to these Personas, several insights emerged from the data. While these are presented in more detail on the following pages, key insights include:

#1 Hybrid working is here to stay

Employees were happy to continue working remotely (81%), but were working longer hours and instead of working 9-5, would prefer flexible hours that change daily to accommodate other commitments.

#2 We rely on each workspace for different things

Employees preferred the office for spontaneous meetings, collaboration and problem solving, preferred remote for focused work, independent problem solving and participating in training, and most employees (69%) want to work no more than two days in the office each week.

#3 We're digitally equipped, but unconvinced about surveillance

Most employees (90%) have access to the technology they need to be productive and they believed their company's technologies are secure (91%), and almost a third of employees (29%) would be happy to have their activity monitored using digital surveillance.

#4 We feel supported by our leaders, but continue to feel challenged by remote working

Most employees felt supported by leaders (85%) or felt leaders were skilled at managing a dispersed team (80%), but many did not believe they were given equal opportunities to those working in the office (37%) and felt they needed to be more responsive when working remotely (38%).

#5 Contrary to popular belief, there is little evidence of a 'Great Resignation'

There was little evidence of 'The Great Resignation', with only 7% of employees likely to leave their employer in the next six months and 21% over the next two years.

Implications for Organisations and Leaders



1. Accept the paradigm shift

Organisations cannot think that things will go back the way they were, any more than they could have waited for the computer age or the social media age to end. Not only is it untenable (unless your workforce is all Connectors and Adapters, which is extremely unlikely), but it's not even desirable. By developing workplace solutions that meet the varying needs of different personas in your workforce, you create the best levels of engagement and productivity. The typical executive is still guilty of thinking that office attendance is more important than it actually is. Holding onto this notion is as counter-productive as thinking that cars would never replace the horse-and-cart. Embracing the new reality opens up a lot more options for companies to prosper.



2. Understand your workforce profile, at a persona level

It's impossible to develop the right workspace strategy if you don't know which personas dominate your workforce. The research showed that every organisation had a different make-up. An organisation weighted to Nesters, Nomads and Stoics will need a very different approach from one made largely of Connectors and Adapters.

This is not merely hypothetical. For example, in the research, Bendelta found one organisation whose workforce was almost entirely remote-centric (i.e. Nesters + Stoics) and another whose workforce was almost entirely office-centric (i.e. Connectors + Adapters), despite the two companies being in ostensibly similar industries. Clearly, those two companies need very different workspace strategies. Even more importantly, understand how diverse your workforce is. If it is concentrated in one or two personas, it will be fairly easy to develop a stance that works for most people. But if you have a very diverse mix, your workspace strategy will need a high level of optionality.

Implications for Organisations and Leaders (cont'd)



3. Make substantive changes to ensure remote and hybrid working is fair and healthy

The research shows that, while being supportive and modelling healthy practices helps, people still find remote and hybrid working tiring and sometimes inequitable. This is even true for those people who prefer to work this way. In particular, make changes that:

- Create more meaningful and frequent connection between colleagues (and don't make them all F2F)
- Reduce the negative impacts of virtual meetings, through their duration, frequency and style
- Level the playing field, so that those working remote can clearly see that they are not being treated as second class citizens

It's important to understand that much of the unfairness stems from unconscious bias, not from negative intent. In the same way that gender bias has required policy and practice changes to address the sometimes invisible discrimination, 'workstyle bias' requires the same steps. For every key process (e.g. onboarding, meetings, social activities, as well as compliance with company policies) ask yourself, "Does this place some personas at an unfair disadvantage?"



4. Develop/sharpen your employee value proposition

While the Great Resignation may be over-stated, employees are still voting with their feet (or mousepads) about where they work. The best antidote is to be able to articulate and deliver an employee experience based on what is distinctively positive about working at your organisation. This should include your stance on workspaces. If you know the persona mix of your workforce, that will best equip you to develop a proposition that is highly attractive to them. Done well, offering a compelling workspace solution can help make your company an employer of choice.



5. Don't abandon the office altogether – but do breathe some life into it

Most organisations contain plenty of Connectors and Adapters, and most (but not all) Nesters, Nomads and Stoics enjoy some time in the office. But nobody – even those who like the office – unthinkingly goes to the office as a default any more. Companies must think about when they need people in the office and what will make it attractive to be there. Those that succeed will not be those who force people to come in, but rather those that make it so appealing that people don't want to miss out (even if it's less frequent than their attendance in the past).

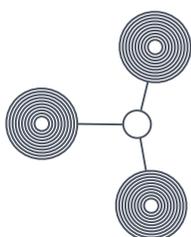
Five Personas: The Next Gen of Employees

Using cutting-edge statistical techniques, including k-means cluster analysis and latent profile analysis on more than 258,000 data points, we were able to recognise consistencies in the distinct patterns of working preferences and experiences that shape where and how employees work.

What resulted was the identification of five Personas, which capture a new generation of employees. Each Persona captures the nuances of how different people experience hybrid working, including their preferred ways of working and the challenges they might experience along the way. These Personas not only help individual employees to better recognise how they work best, but also enable leaders to quickly understand the composition and working preferences of their organisation and make informed, impactful decisions about their team.

Connectors

Preferred workspace: **the office**



Key attributes:

- Connectors value the relationships they have with colleagues in the office and enjoy the sense of energy they get from in-person connections in the office
- Connectors feel that working in the office supports their work-life balance, where they are more able to keep their personal and work lives separate.
- Connectors believe that working in an office helps them to better access information and technology, and helps them to share information with others more effectively.

Key challenges:

Connectors find it challenging to collaborate when working remotely, and can find virtual meetings particularly tiring.

If working remotely for long periods, Connectors are likely to feel a sense of disconnection from their colleagues.

Five Personas: The Next Gen of Employees (cont'd)



Nesters

Preferred workspace: **the home**

Key attributes:

- Nesters feel they are more productive when working remotely, and feel more comfortable working from home
- Nesters feel they are as able to access and share information when working remotely, and feel that they can collaborate just as easily too.

Key challenges:

Nesters don't particularly enjoy the office energy or office-based connections with their colleagues.

Nesters don't believe that working in the office provides them with an improved work-life balance.



Nomads

Preferred workspace: **remote**
(spaces other than their primary residence)

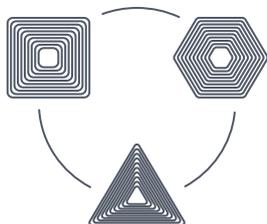
Key attributes:

- Nomads are more comfortable working remotely, they believe they can collaborate just as well remotely as they can in the office, and feel they can effectively access and share information regardless of where they are working.
- Nomads do not work from the office or from home. Instead, they prefer and tend to work from other remote spaces where they feel more comfortable.

Key challenges:

- Nomads don't particularly enjoy the office energy, tend not to crave office-based connections with their colleagues, and do not find that the office supports their work-life balance.
- Nomads do not feel they have flexibility to choose how they work.

Five Personas: The Next Gen of Employees (cont'd)



Adapters

Preferred workspace: **the office**

Key attributes:

- Adapters enjoy the energy that comes from working in an office, as well as the connections they can build with colleagues in an office environment.
- Adapters find accessing and sharing information easier in the office, which is enhanced via the technology that they feel is superior to other workspaces.
- Adapters find that working in the office supports their work-life balance, and prefer to separate their work and personal lives.
- Adapters would support an organisational mandate around working remotely a certain number of days.

Key challenges:

Adapters feel that their manager or team expects them to work from the office.

Adapters feel that they need to justify working remotely, and that they do not feel they have flexibility to choose where they work.



Stoic

Preferred workspace: **the home**

Key attributes:

- Stoics work from home and not the office.
- Stoics do not enjoy the office energy or connection with colleagues in the office, nor do they find that working in the office supports their work-life balance.
- Stoics feel they are no more productive working remotely as anywhere else, nor do they find information access and sharing easier in one workspace than another.

Key challenges:

Stoics feel disconnected from colleagues when working remotely.

Stoics do not feel more comfortable working in their remote space.

worksona™ Insights

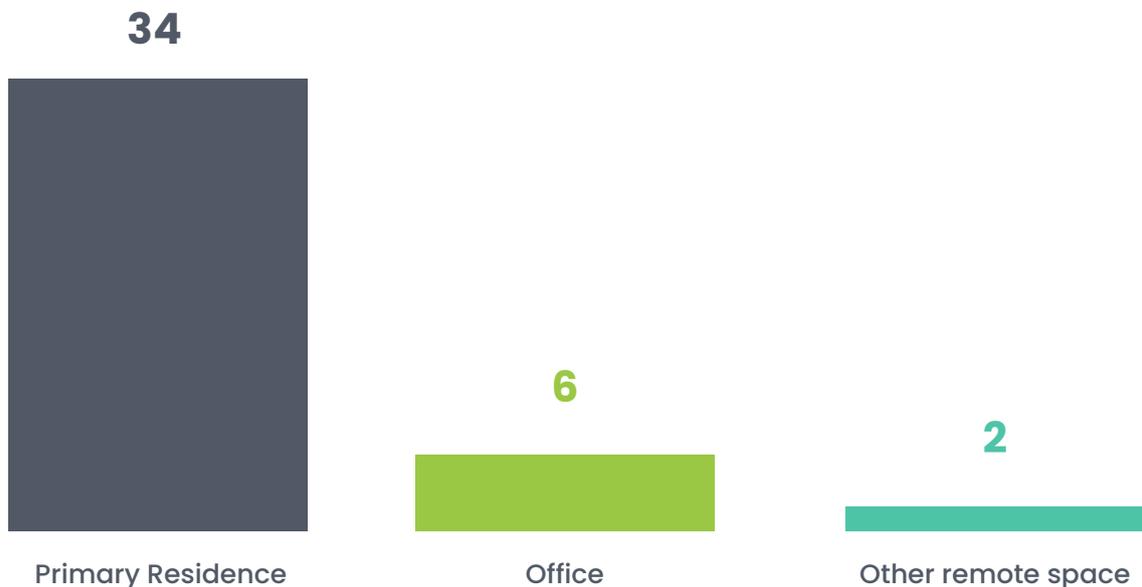
Insight #1: Hybrid working is here to stay

One of the many consequences of the pandemic was the sudden and significant change to remote or hybrid working. As such, it is little surprise to see that the data confirms hybrid working is here to stay:

- 99% of respondents had worked remotely at least once in the past year, and 91% had worked in the office at least once over that same time
- Considering the 7 days prior to completing worksona™, on average across all respondents, employees had worked 85% of their working hours remotely, compared to only 15% of their working hours from the office
- 81% of respondents said they could keep working in their current remote workspace for the next six months (and an additional 13% said they could, with some changes)
- This shift to remote or hybrid working means that we are working differently, with 60% of employees working more than 40 hours per week. More often than not, these hours were not '9-5'.
- There is a strong difference between the actual and preferred arrangement of these hours. Respondents want to work less traditional (-8%) or extended hours (-20%), and more varied hours (+24%) that accommodate their other commitments.

Average number of hours worked in the last week , by location

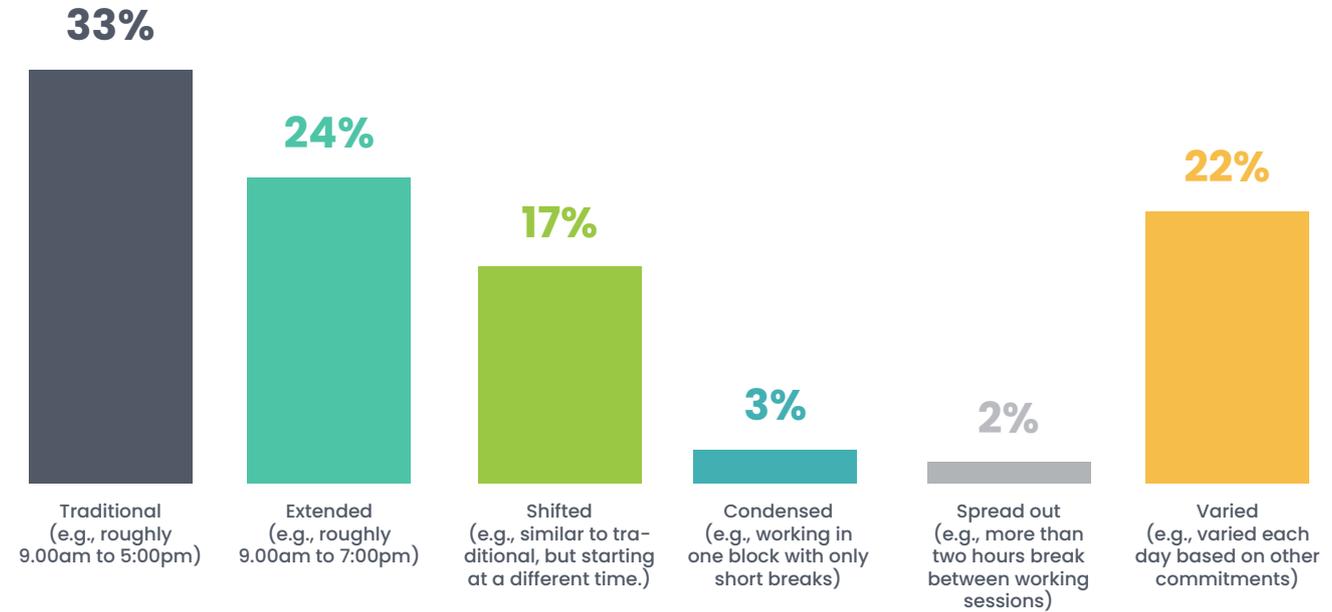
Bendelta worksona™ data, n>100



worksona™ Insights

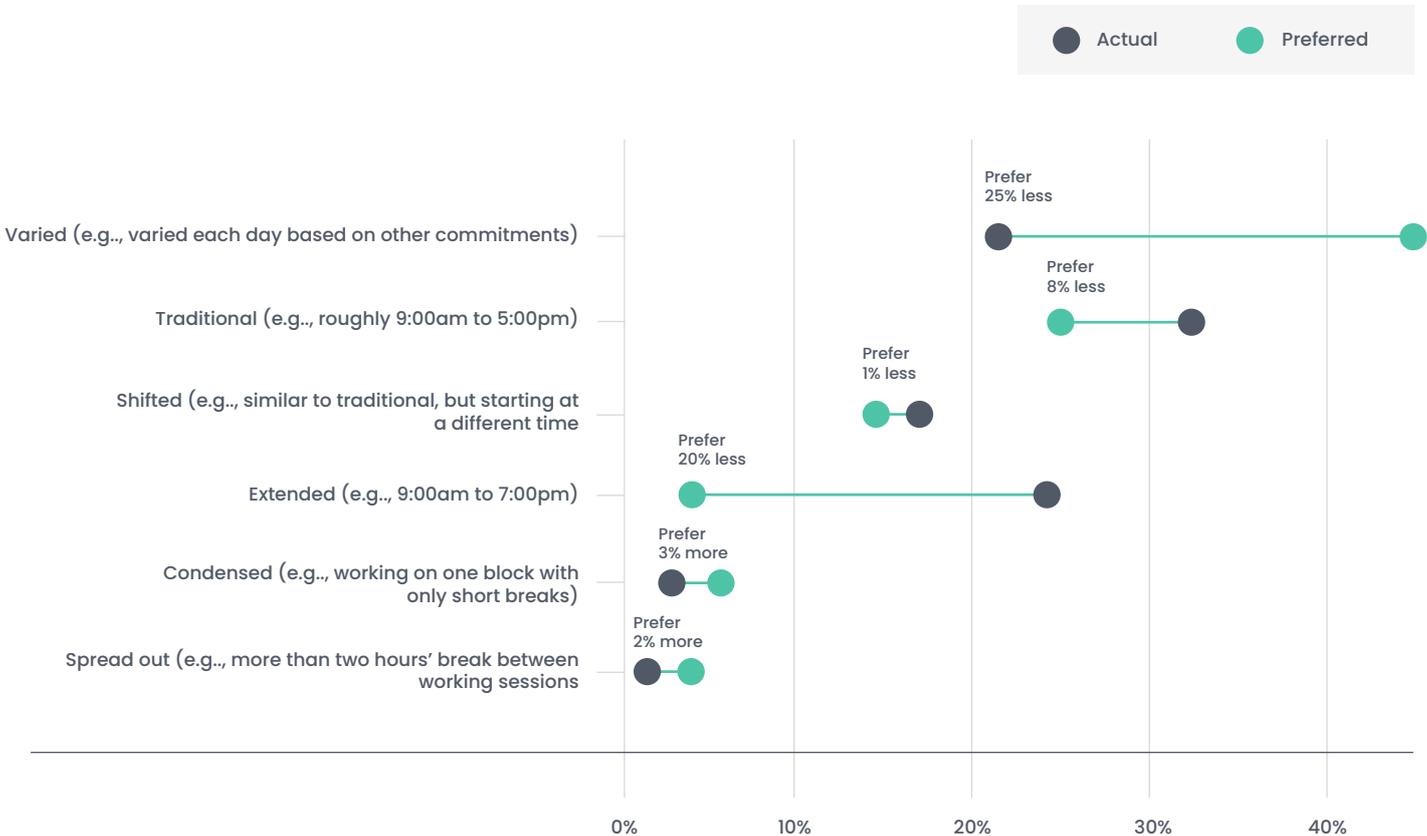
Over the past seven days, which best describes the spread of your working hours:

Bendelta worksona™ data, n>100



Actual and preferred spread of working hours

Bendelta worksona™ data, n>100



worksona™ Insights

Insight #2: We rely on each workspace for different things

Employees have developed preferences for where they work best, depending on what they're doing

- Employees believe the office supports them best when attending spontaneous meetings, collaborating within their teams, or innovating or problem solving with others.
- By contrast, they feel remote spaces support them better when conducting individual, focused work (such as reading, planning, thinking, or researching), innovating or problem-solving alone, undertaking training or formal learning, or collaborating outside their team but within their organisations
- Some tasks are perceived to be supported equally well regardless of where they're performed: informal learning, planned meetings or discussions, accessing and sharing information or knowledge, collaborating outside of their organisations, or managing customer or client relationships.

These perceptions and experiences, along with employers' expectations and employees' personal circumstances, have shaped workers' office/remote centrality:

69%

of respondents identified as remote-centric (prefer to spend 40% or less of their time in the office)

15%

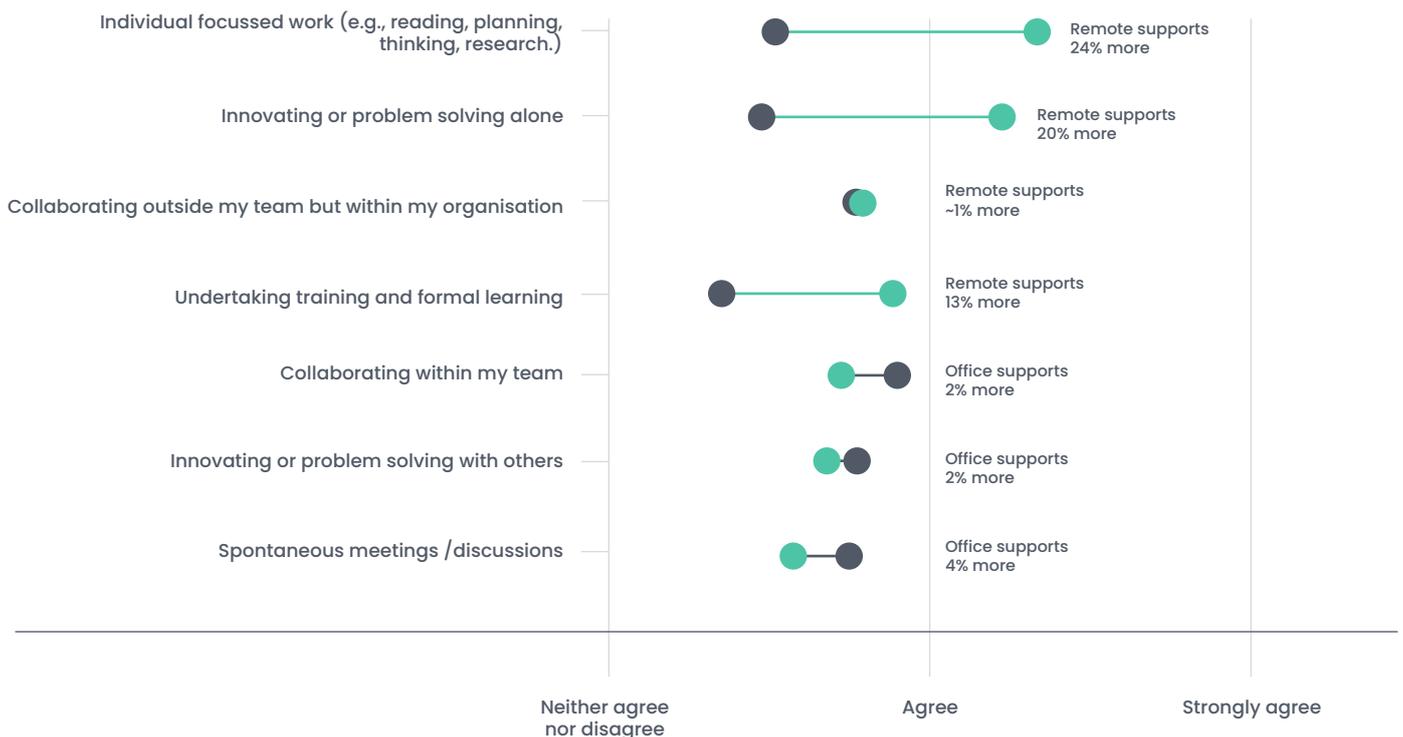
of respondents identified as office-centric (prefer to spend more than 60% of their time in the office)

16%

of respondents expressed no strong preference in either direction (prefer to spend between 40% and 60% of their time in the office)

Actual and preferred spread of working hours

Bendelta worksona™ data, n>100



worksona™ Insights

Insight #3: We're digitally equipped, but unconvinced about surveillance

Most employees are reporting a positive digital experience:

90%

of respondents indicated that they had access to the tools and technology they needed to perform their roles well

92%

had confidence in their ability to use these systems and technologies

85%

reported being clear on their organisation's digital etiquette

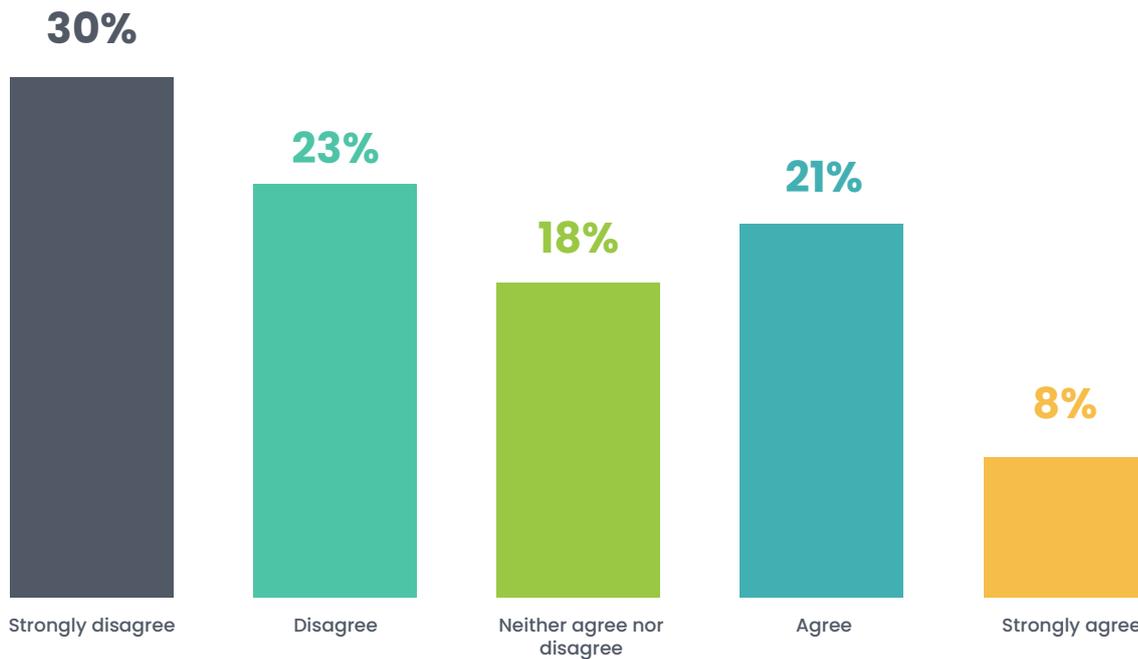
91%

believe their organisation's technologies are secure

Our views on digital surveillance are more divergent: 29% of respondents would be comfortable with their activity being monitored by their organisation, while 53% would not.

I would be comfortable if my organisation were to monitor my activity using digital surveillance

Bendelta worksona™ data, n>100



worksona™ Insights

Insight #4: We feel supported by our leaders, but continue to feel challenged by remote working

Across the board, employees noted that the leaders of their workplace delivered clear direction and strong support during times of uncertainty and change:

80%

of respondents reported that their manager is skilled at managing a dispersed team

89%

know precisely what others expect of them at work

85%

feel supported to perform well

69%

reported that employees are held accountable

64%

stated that results are generally valued more than hours worked

60%

said that their leaders model healthy hybrid working practices

75%

of people in this sample had flexibility to choose where they worked and 74% had flexibility to choose how they worked

Despite these positive experiences with leadership, it is clear that working remotely is not a positive experience for everyone. When working remotely:

38%

of respondents feel they need to be more responsive

37%

of respondents find virtual meetings tiring

35%

of respondents feel disconnected from colleagues

37%

of respondents do not believe they are given equal opportunities to those working from the office

This imbalance between strong leadership and the persisting pressures of remote working is reflected in the data about workplaces policies and expectations regarding hybrid working:

Only

29%

of respondents agree with their organisation mandating how many days they can work remotely

Only

69%

of respondents agree that hybrid work decisions are clear

Views are conflicting

regarding how meetings should accommodate hybrid workers, with

19% of respondents agreeing that they should only be attended all in-person or all-remote

Insight #5: Contrary to popular belief, there is little evidence of a 'Great Resignation'

Much has been made of the 'great resignation'; that amidst the rapid changes in ways of working, an unprecedented number of employees will suddenly resign, leaving organisations disrupted and struggling to source employees during a skills shortage and war for talent in the labour market. However:

Over the next 6 months, only

7% of employees said they were likely to leave their employer, with 22% unsure and 72% unlikely to leave



Over the next 2 years,

21% of employees are likely to leave (three times the portion of the six-month horizon), with 43% unlikely to leave



More than a quarter,

26% of employees are still looking out for opportunities, with another 26% unsure, meaning less than half (48%) of respondents are at least keeping an eye on opportunities outside their current organisation



Intentions to leave were similar for

21% managers and individual contributors

