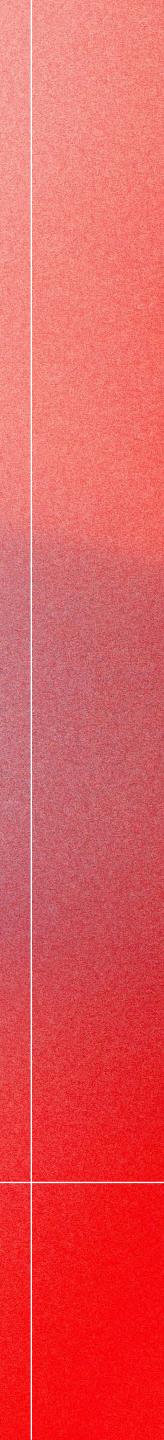
the evolution REPORT



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Methodology

Study

In partnership with Angus Reid Group, Staples Professional conducted a survey among Canadian hybrid-working employees and senior decision makers to understand the experiences and perceptions of splitting workdays between the home and office.

Sample

The survey sample consisted of hybrid working employees and senior decision makers (employers) at companies/organizations with 5 employees or more, who have their workforce working hybrid:

Employer sample: n=311 Employee sample: n=1,006

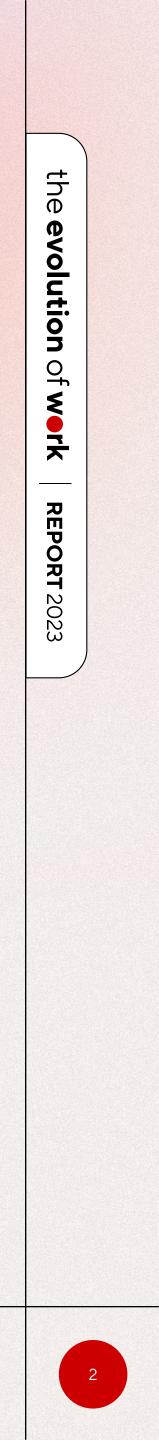
Field Window

August 4th to 15th, 2023.



N 023.











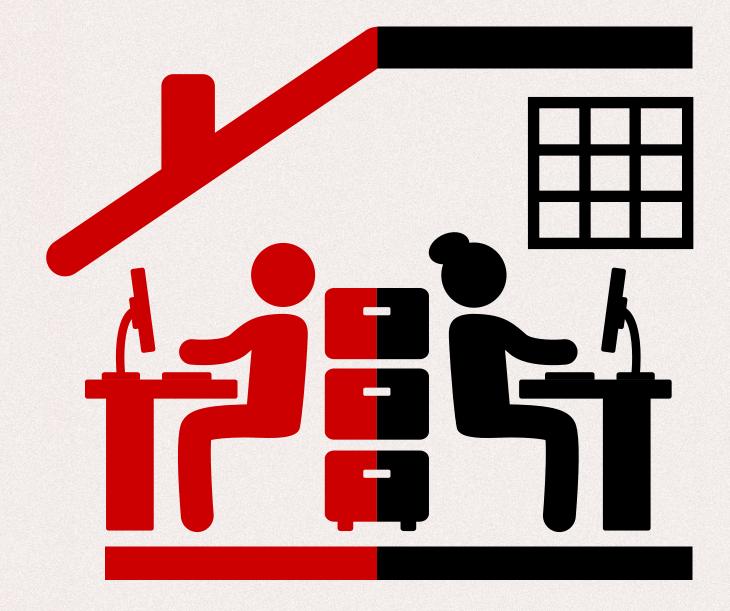


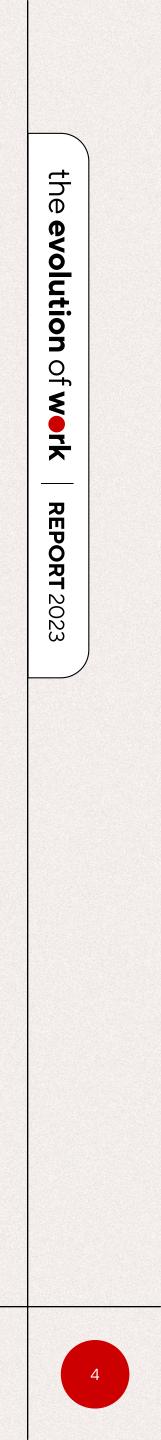
While most hybrid workers are required to come into the office each week, they are nevertheless highly satisfied with the arrangement - fourin-five are satisfied with the balance of home vs. office days they currently have.

Given the choice, most (62%) would continue working hybrid and only one quarter would opt to go back to a fully remote model.

However, many hybrid workers see an opportunity to fine tune hybrid work to better fit them - while three-in-ten are currently working their ideal number of home vs. office days, an equal proportion want to shift the balance towards more days spent working from home.

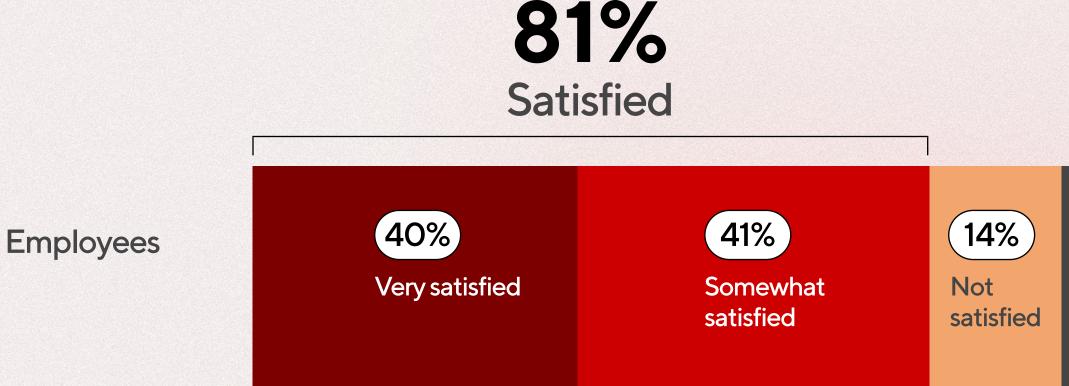






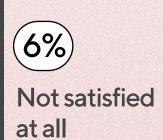
Hybrid working employees are highly satisfied with working a mix of days in the office and at home.





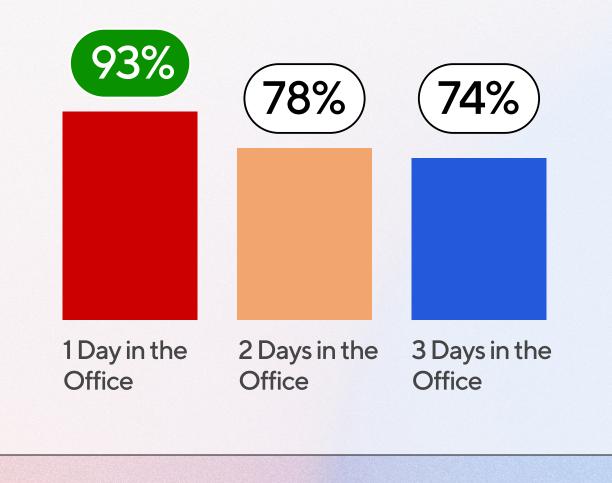






Satisfaction x Number of Office Days

Employees coming into the office 1 day per week are more satisfied with the balance of home vs. office days they work.



Significantly higher/lower at 95% confidence.

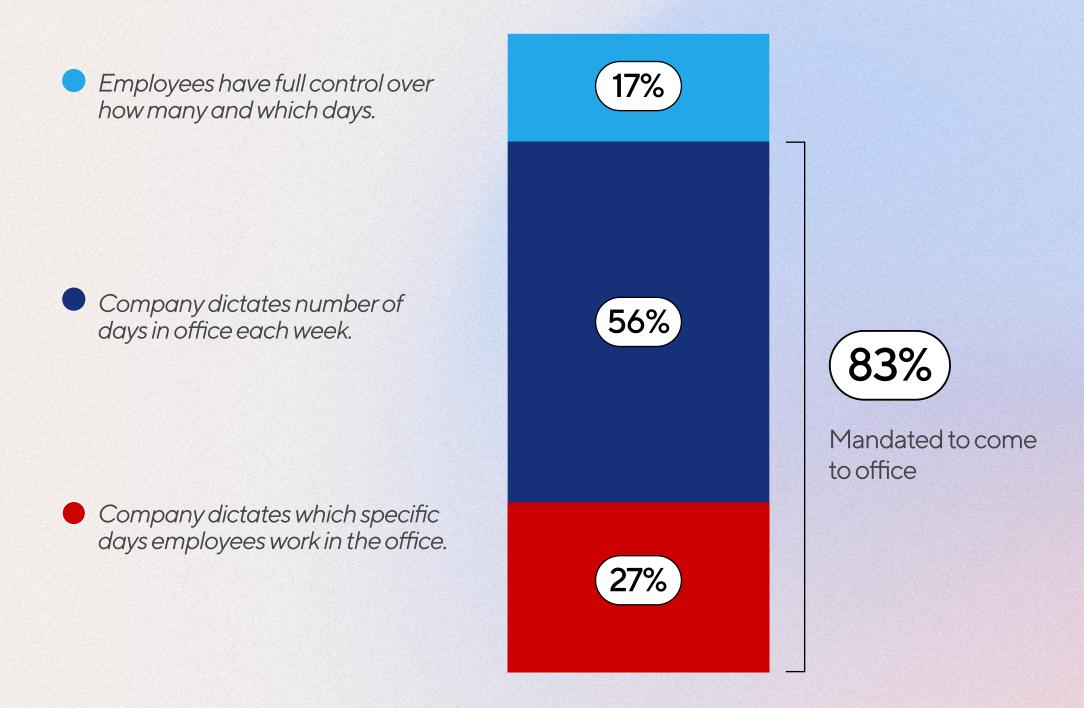
Base: Employees (n=1,004)

A7. How satisfied are you overall with the current balance of in-office vs. remote workdays you have at the moment?



Most hybrid workers are currently mandated to come into the office for at least a specific number of days. Just under one-in-five have full control over when they come in.

Control Employees Have in Choosing in-Office Days





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What Happens When Employees Can Choose?

Employees who have full control over how many and which days they come into the office are both happier while at work and report stronger team spirit among employees at their company.

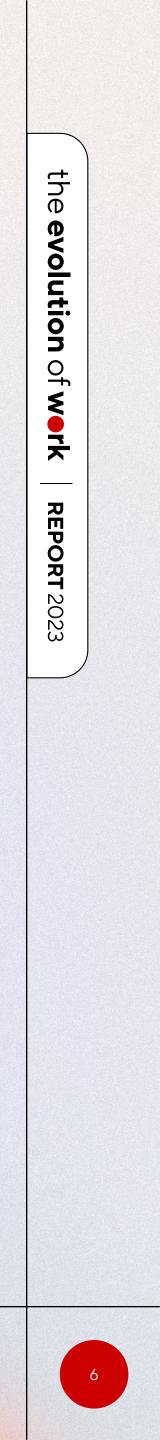
68%

Describe the team spirit of employees at their company as good (vs. 51% required to come in on specific days).

70% Say they are happy/very happy on most workdays (vs. 60% required to come in on specific days).

Employees who can choose when they come in are also **less likely to say they are happiest when working from home** (45% vs. 58% of those required to come in), and more likely to say working at home vs. in the office has no impact (30% vs. 20%).

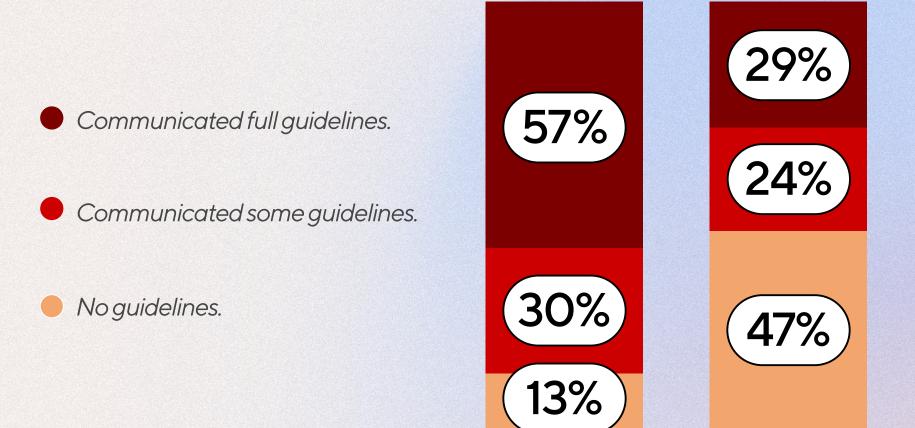
> Base: Employees (n=1,004) A5B. Which of the following best describes your ability to choose when you work in the office vs. from home / remote?



Hybrid employees are mostly informed about when and how often they will be coming into the office through the end of 2023, although there is uncertainty for 2024.

Communication about Hybrid Work Guidelines from Employer

Among Employees



For the rest of 2023

For 2024 and beyond

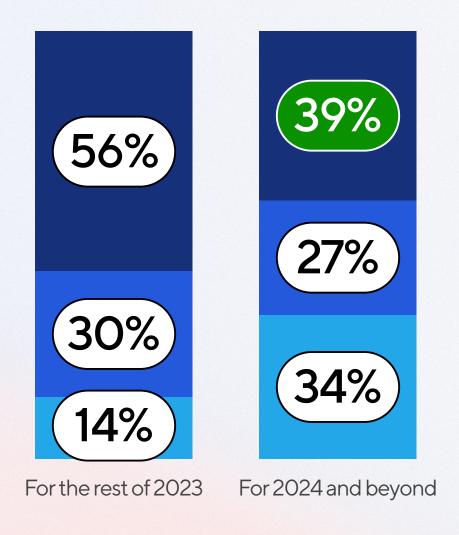




Employers' Perspective

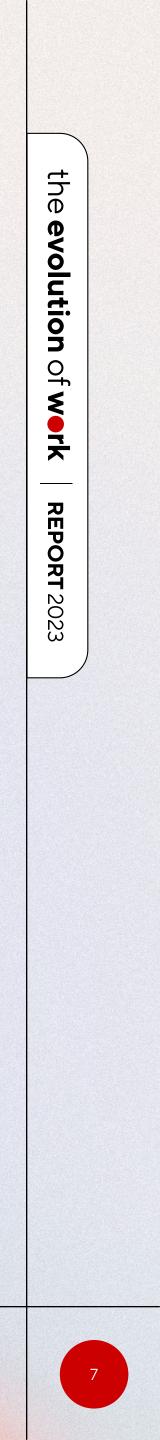
Employers and employees are fully aligned on clarity of guidelines for when and how often employees will come into the office for 2023, but beyond that some employees are missing the memo – employers are more likely than employees to state their company has communicated full hybrid working guidelines for 2024 and later.

- Communicated full guidelines.
- Communicated some guidelines.
- No guidelines.
- Significantly higher between employees and employers at 95%. confidence.



Base: Employees (n=1,004)

C1. To what extent has the company/organization you work for communicated guidelines for when and how often employees can work from home vs. in the office over the following time frames?



Most (62%) employees currently working hybrid prefer that arrangement over being fully remote or primarily in the office. Only a minority of one quarter would rather switch (back) to fully remote working.

Preferred Balance of At Home vs. In-Office Workdays

23%

62%

FULLY REMOTE 5 days at-home each week

HYBRID 1-3 days in-office each week









Half want to come into the office 1 day per week (27%) or 2 days (25%). Only 9% would prefer to come in 3 days each week.

Base: Employees (n=1,004), Employers (n=311) A8. What is your preferred balance of days worked from home/remotely vs. days worked in the office that you'd like to continue indefinitely?



While most hybrid workers want both at-home and in-office days each week, only three-in-ten are currently working a balance of home vs. office days that's ideal for them. An additional three-in-ten want to continue working hybrid, but with fewer days at the office.

Preferred Arrangement vs. Current Number of Home vs. Office Days

FULLY REMOTE

HYBRID Fewer days in the office

CURRENT WORKING preferred number of days in the oofice

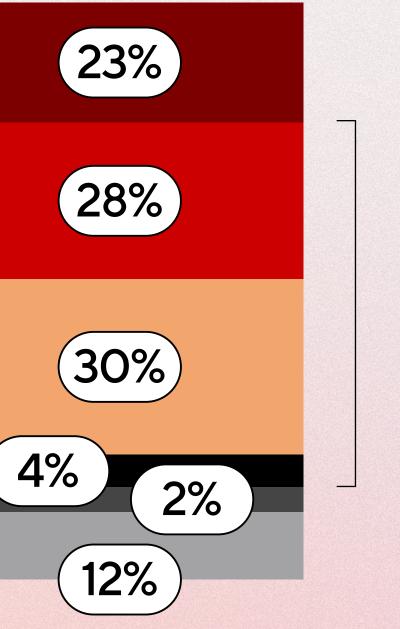
HYBRID More days in the office

PRIMARILY in the office

NEED TO CHANGE week-to-week









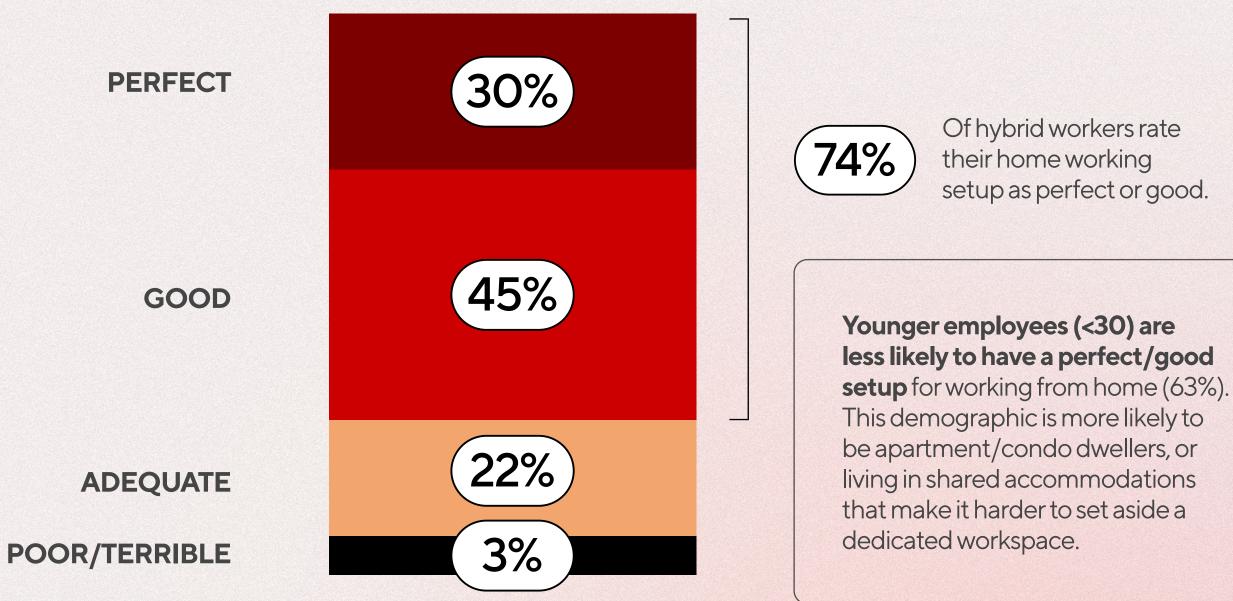
Want to continue working hybrid

Base: Employees (n=1,004), Employers (n=311) A8. What is your preferred balance of days worked from home/remotely vs. days worked in the office that you'd like to continue indefinitely?



Hybrid workers are well-equipped to work from home - three quarters say their setup for home is good or perfect.

Rating of Current Work-from-Home Setup





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Of hybrid workers rate their home working setup as perfect or good.

less likely to have a perfect/good

Comparison with hybrid work in 2022:

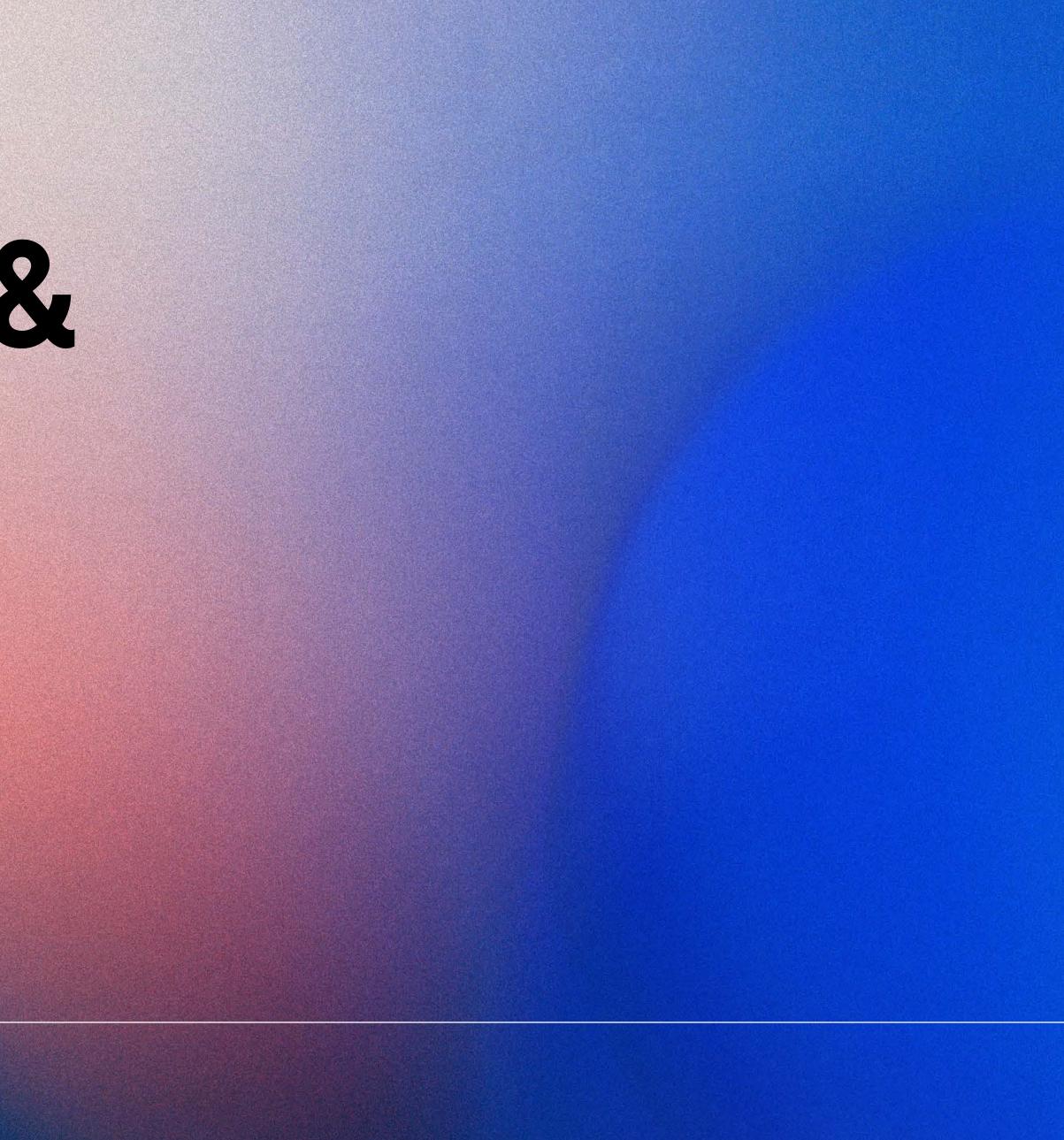
Hybrid workers in 2023 have better setups for working from home now -66% rated their setup as perfect/ good in 2022 vs. 74% today.

This increase may be attributable to some previously fully remote workers with comprehensive workat-home setups now returning to the office in hybrid form.











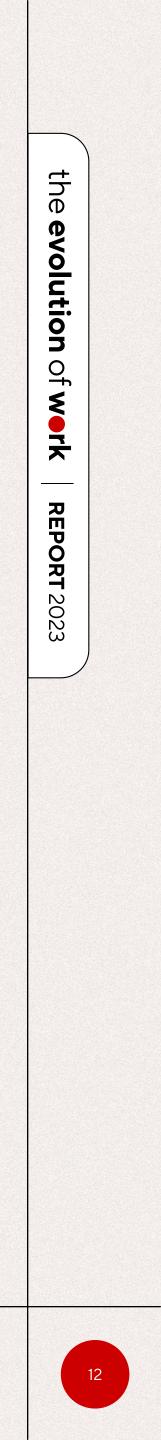


Hybrid workers see clear advantages to being able to work from home, experiencing better productivity and even higher levels of happiness on their working-at-home days.

However most hybrid workers would not choose to work at home all the time as they have found both working from home and in the office have their own unique advantages to leverage. Having the ability to work from home or in the office enables employees to optimally manage their work-life balance while also feeling connected and building relationships with their colleagues.

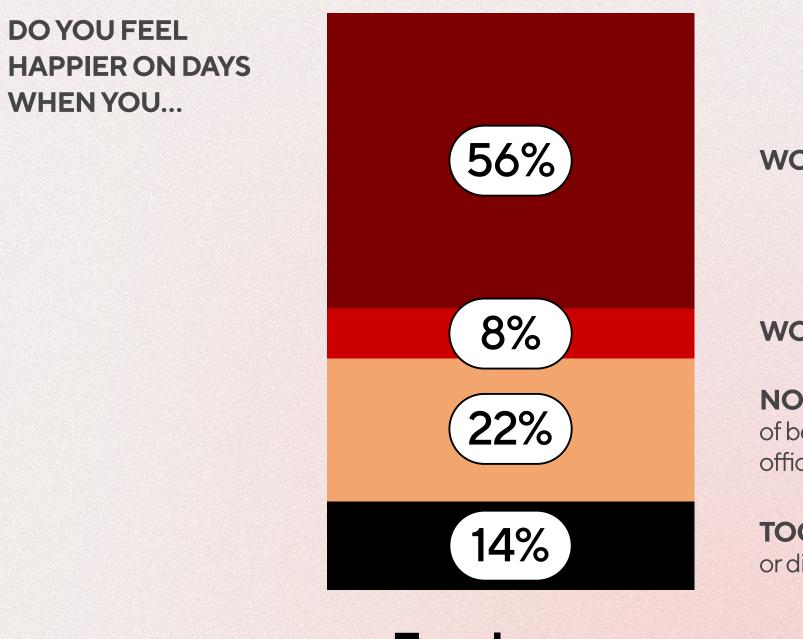
Having seen productivity gains working from home, employees see the value of the office as less about working productively and more of an opportunity to connect with colleagues. This social draw for employees to come into the office is not fully appreciated by employers who are nearly twice as likely to say better learning / mentoring are primary benefits to having employees in the office, and underappreciate the value of a change of atmosphere for employees.





Employees say they are happier on days when they work from home – over half say they are happier on work-at-home days vs. 8% happier when they work in the office.

Happiness During the Workday Depending on Work Location



Employees





WORK AT HOME

Employers are seeing this – 52% of employers say their employees are happier when they work from home; only 12% say they are happier when they work in the office.

WORK IN THE OFFICE

NO IMPACT

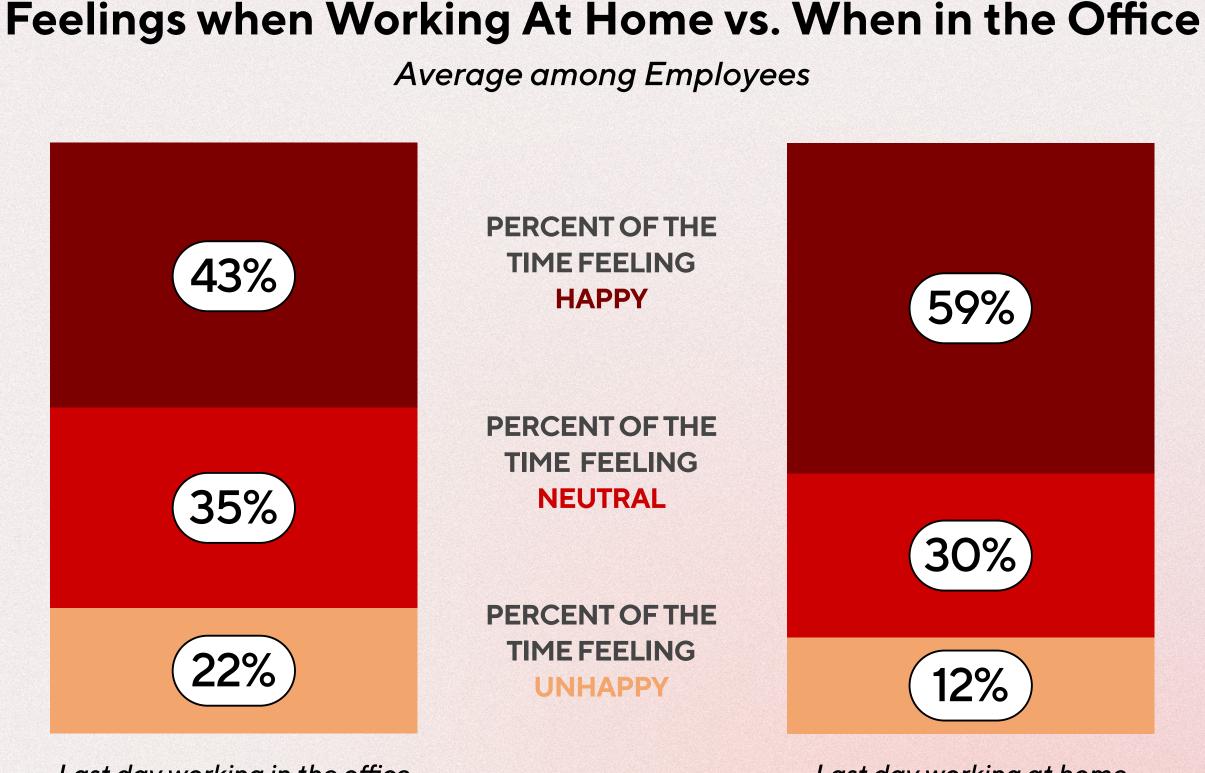
of being at home or in the office on how happy I feel

TOO VARIED

or difficult to say



Employees report feeling happy for a larger proportion of the day when working from home vs. in the office.



Last day working in the office

Base: Employees thinking about last day in the office (n=460) and last day working at home (n=491) B2A. Still thinking on that last day you worked [in the office/at home], approximately what percentage of the time did you feel happy, unhappy or neutral?

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Who's Happiest in the Office?

Employees are happier more of the time in the office if they are:

- In Quebec (58%)
- Newer employees with the company less than 1 year (51%)
- Experiencing low / no burnout (47%)
- Able to choose how many / which days they come into the office (50%)

Last day working at home



() Significantly higher between employees and employers at 95% confidence



Main Benefits of Working from Home

Commuting is a major hurdle for employees and avoiding it is the strongest benefit hybrid workers see in working from home. Beyond this, hybrid employees are finding improved ability to focus working from home.





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Not needing to commute is the major benefit employees see to working from home.

Better ability to focus is the strongest benefit employees see that improves their ability to work, beyond not needing to commute.

Employees see privacy as a stronger benefit to work from home than employers (36%).

Employees that work from home more often (4 or 3 days per week) are more likely to note their better ability to focus at home (57%) than employees coming into the office 3 days per week (46%).

Employees that come in 3 days per week are more likely to say working from home gives them a change of atmosphere vs. the office (18%).



The top benefits employees see for coming into the office are not directly work related - employees value the change of pace and ability to work in-person with their coworkers.

Main Benefits of Coming Into the Office

Ranked Top 3



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Top benefits to coming into the office that employees see are to shake up their day-to-day routine and be with their coworkers.



The top benefits employees see for coming into the office are not directly work related - employees value the change of pace and ability to work in-person with their coworkers.

Main Benefits for Employees Coming Into the Office?

Ranked Top 3

	49%	Change of atmosphere / getting out of house
	48%	Enjoy being with my colleagues
	27%	Good for networking / career progression
	22%	Meetings are easier / more effective
	22%	Better able to mentor newer employees
	21%	Better able to learn from others / senior employees
	21%	Better equipment in the office
	12%	Able to focus better on my work
Perspective	Employees' F	

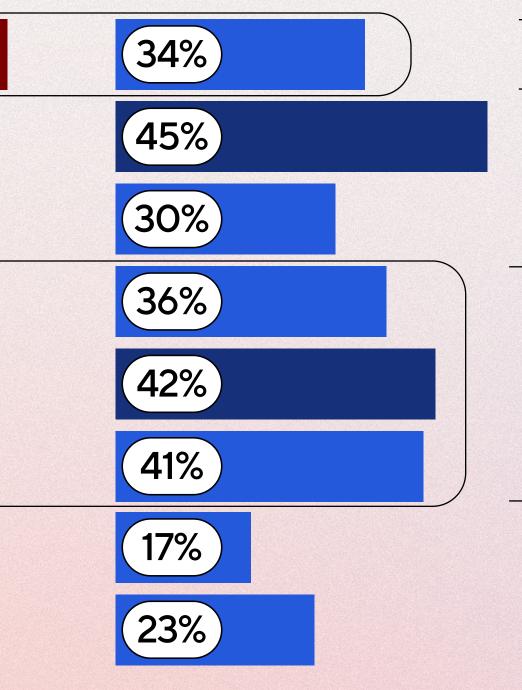
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Base: Employees (n=1,004), Employers (n=311) [Employees] B9. What do you see as the main benefits to coming into the office to work?





Employers' Perspective

Employees value a simple change of atmosphere more than employers' realize.

Employers see in-person collaboration and learning as stronger benefits for coming into the office than employees do.



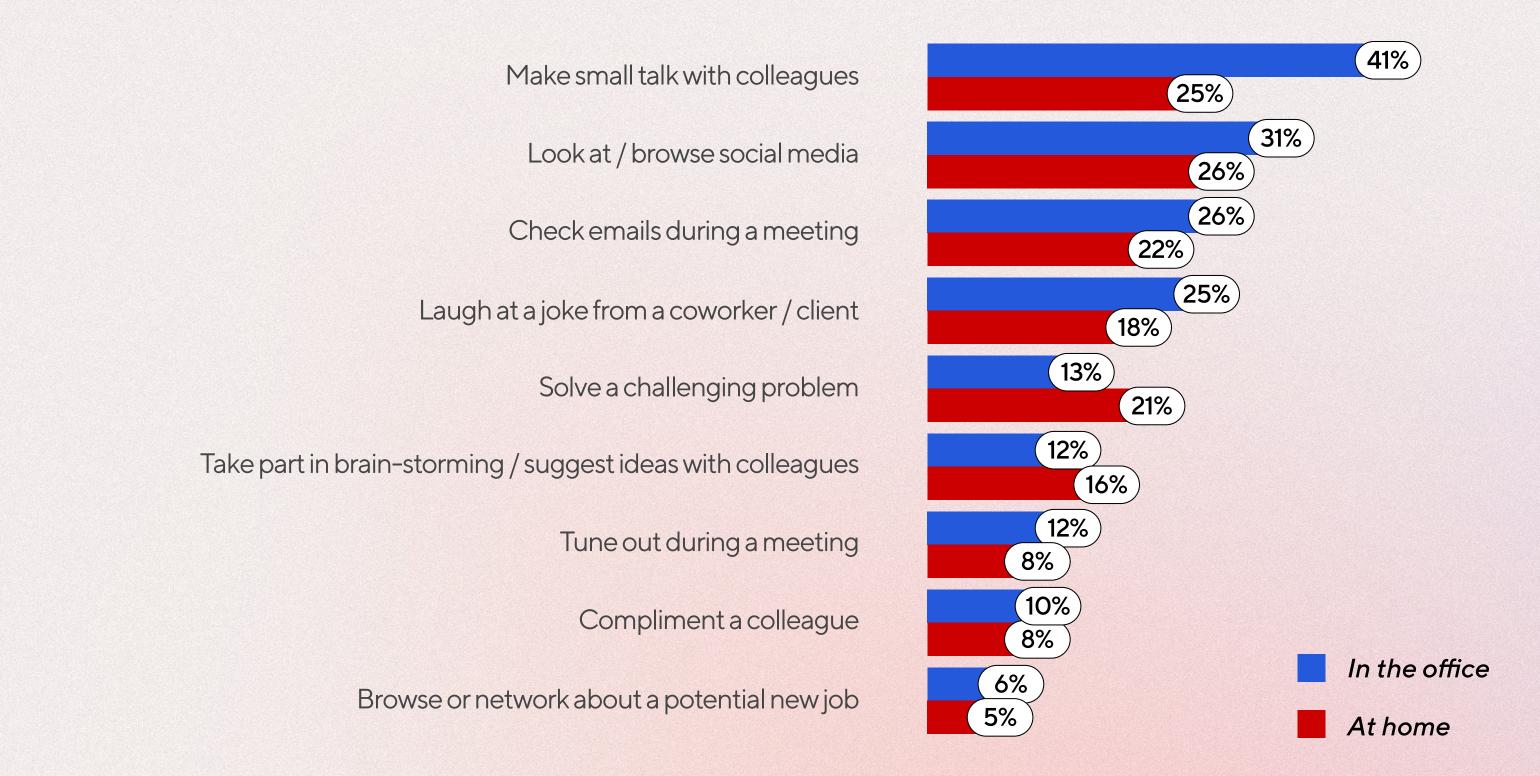
Significantly higher between employees and employers at 95% confidence



Social interactions happen more in the office - employees are making more small talk with colleagues and more likely to laugh at jokes. Meanwhile in-depth problem solving is happening more often on work-at-home days.

Frequent Interactions and Behaviours when Working At Home vs. When in the Office

Have Done at Least Three Times a Day Among Employees



Base: Employees thinking about last day in the office (n=489) and last day working at home (n=591) B2. Thinking on that last day you worked [in the office/at home], to the best of your recollection, how many times did you...

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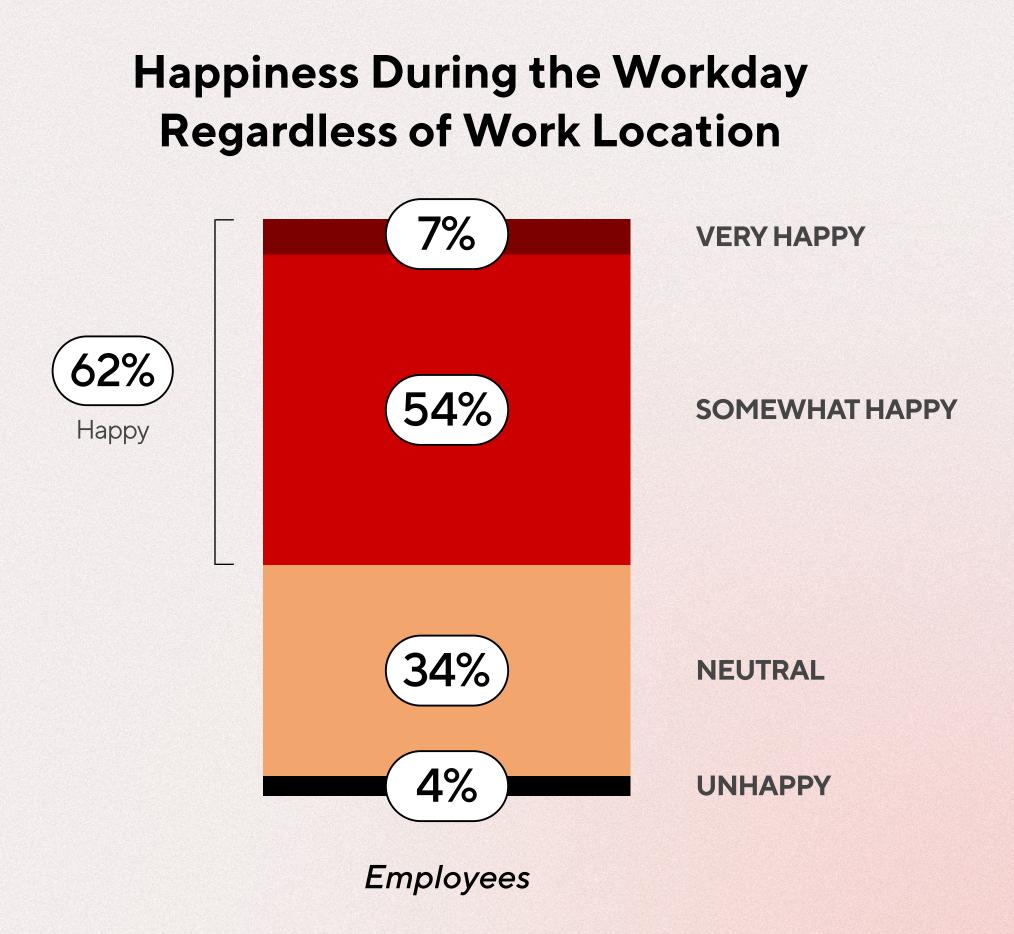




Significantly higher between employees and employers at 95% confidence



Most employees describe themselves as happy on most workdays, regardless of whether they are in the office or at home.





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Happiness x Number of Office Days

Although employees coming into the office only 1 day each week say they are more satisfied with the arrangement than those coming in more often, impact on day-to-day happiness is not severe.

While employees working more days from home are more satisfied with the arrangement, they are not necessarily happier.



1 Day in the office



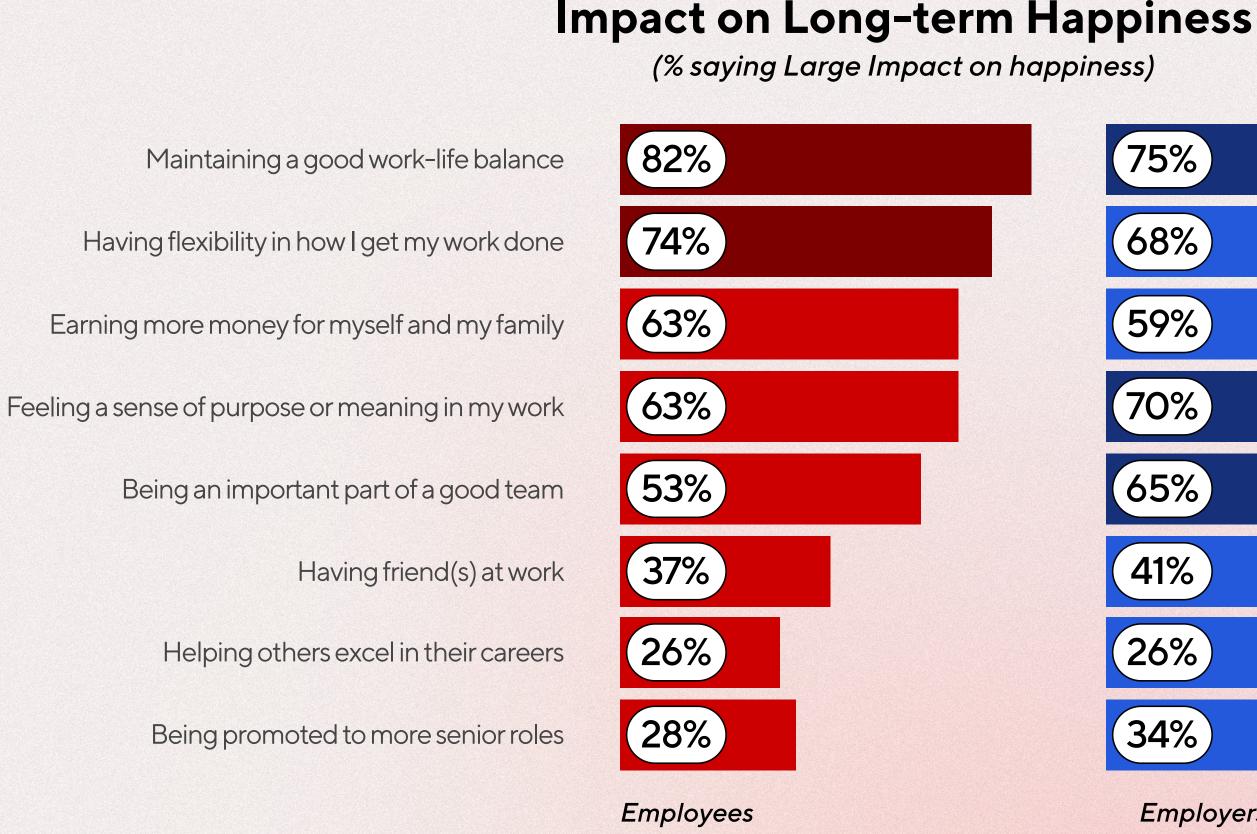
2 Days in the office



3 Days in the office



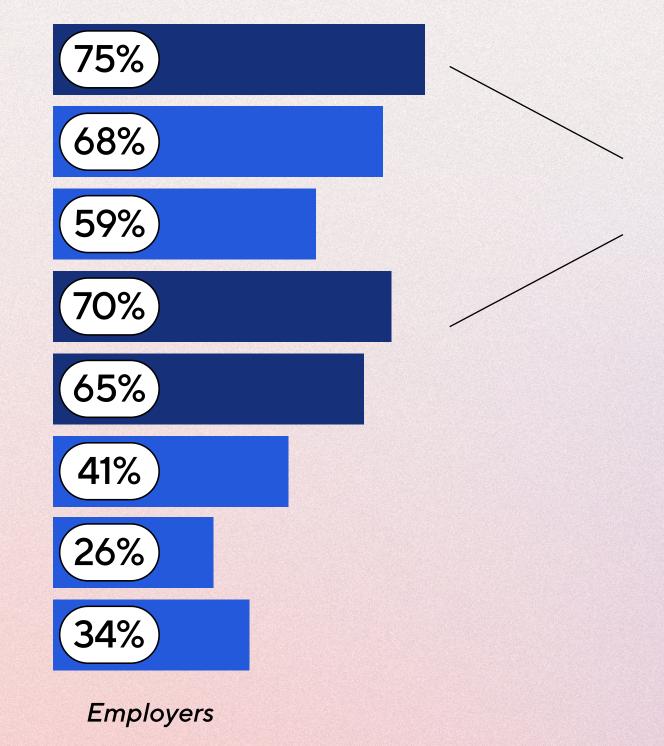
Majorities of employees note work-life balance and flexibility as having large impacts on their long-term happiness - more so than earning more money and finding purpose in their work.



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Base: Employees (n=1,004), Employers (n=311) [Employees] B9. What do you see as the main benefits to coming into the office to work? [Employers] B9. What do you see as the main benefits to coming into the office to work for your company / organization's employees?





While employers and employees are generally aligned on the impacts of these factors for long-term happiness, employers somewhat discount the importance of worklife balance and flexibility, and overestimate the impact of being a part of a good team and finding purpose in one's work.



Significantly higher between employees and employers at 95% confidence











KEY FINDINGS

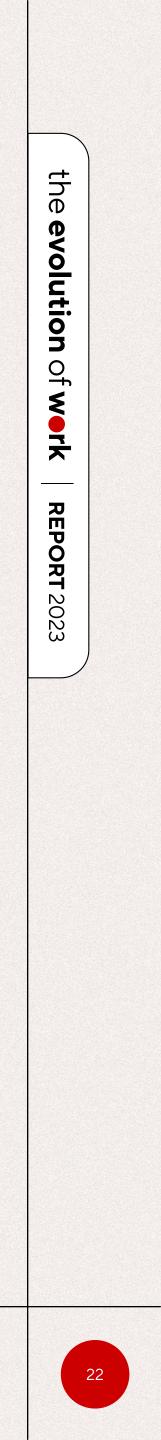
Managing Challenges While Werking Hybrid

While hybrid workers and their employees are on the same page for the types of challenges faced when splitting work weeks between home and office, their views diverge on how these challenges are best managed. Employers lean heavily towards believing bringing employees together in the office as the best way to manage work-related difficulties, while employees have learned that both working from home and in the office have unique advantages.

Employees see importance of being in the office to grow relationships and better coordinate with colleagues, but also find themselves better able to manage their time and stay on top of things when they can work from home. In addition to removing their commute, employees are finding enhanced productivity doing focused work at home, and plan and allocate their week's tasks between the home and the office to be most productive.

Understanding that working at home and in the office both have advantages for different parts of their jobs has created a strong appreciation for flexibility among hybrid working employees. Nearly all hybrid working employees say it's reasonable for them to choose when they get their work done, either at home or in the office, and also note this flexibility for when they work as one of the top things that would improve their experience coming into the office.





Staying motivated and managing their work-life balance are core challenges for hybrid workers.

Top 10 Challenges Employees Face

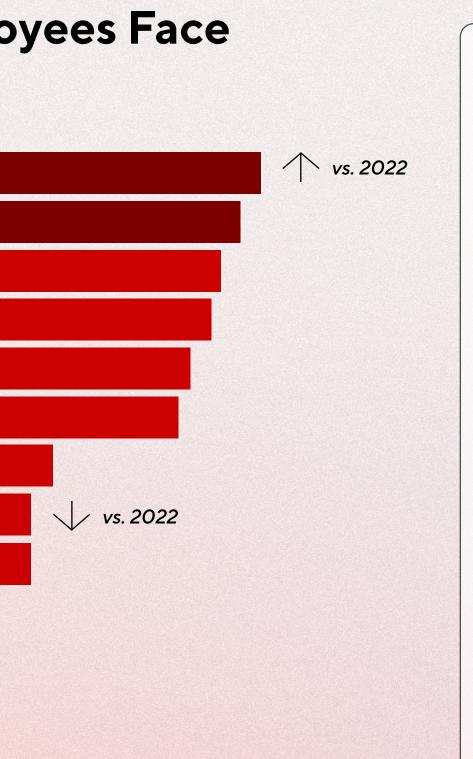
Among Employees

43%
41%
39%
38%
36%
35%
27%
25%
25%
25%
21%
19%
18%
17%

Staying motivated

- Needing to commute
- Excessive job demands / difficulty managing work-life balance Ability to advance in my organization / general career progression
 - Lack of direction/communication from management
 - Keeping my morale up
 - Feeling connected with my organization
 - Communicating / coordinating with my colleagues
 - Training / keeping my skills up to date
 - Building quality social relationships with people at work
 - Effectively managing / supervising employees
 - Staying on top of industry trends
 - Lack of equipment / technology to do my job properly
 - Lack of software to do my job properly





Comparison with hybrid work in 2022:

Primary challenges for hybrid workers in 2023 have not changed substantially over the past year. While concerns about motivation and managing the demands of one's job have not improved; they have also not worsened.

While commuting is a larger challenge now in 2023, more time spent working in a hybrid model is leading to better relationships, with fewer hybrid workers struggling to develop social relationships at work as a challenge.



Employers strongly appreciate work-life balance struggles for their hybrid employees - six-in-ten say employees are facing this challenge.

Top 10 Challenges Employees Face

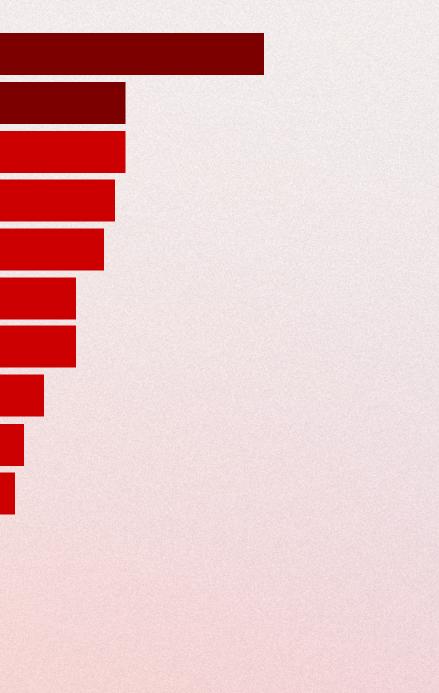
Employers' Perspective

	58%
	43%
(43%
	42%
	41%
(38%
	38%
	35%
(33%
(32%
(29%
	23%
	23% 22%
	22%

Excessive job demands / difficulty managing work-life balance Staying motivated Feeling connected with the organization Ability to advance in organization / general career progression Keeping morale up Communicating / coordinating with colleagues Lack of direction/communication from management Needing to commute Training / keeping my skills up to date Effectively managing / supervising employees Building quality social relationships with people at work Staying on top of industry trends Lack of equipment / technology to do my job properly Lack of software to do my job properly

Base: Employers (n=311)





What do Employers See **Differently?**

While challenges employers see their staff facing are generally in line with employees' own perspectives, employers overestimate the prevalence of some challenges.

Employers are more likely to think their employees are facing challenges connecting with the organization and other colleagues.

B6. What do you think are the biggest challenges employees at your company/organization are currently facing at their jobs?



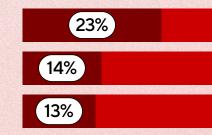


Employees see clear benefits to days worked at home in keeping up with job demands and improving their morale, and this has an added benefit of helping find time to upskill and keep up with industry trends.

Are Challenges Best Managed Working at Home vs. the Office?

Among Employees

with people at work	16%	19%	65%)
ong with colleagues	17%	30%	(53%
ed with organization	13%	39%		48%
pervising employees	15%	38%		47%
y to do job property	23%	41%		36%
l career progression	14%	58%		28%
from management	13%	59%		28%
do their job properly	19%	56%	6	25%
op of industry trends	32%		49%	19%
ping skills up to date	36%		44%	(20%)



Developing/Building quality social relationships w Communicating/Coordinatio Feeling connected Effectively managing/supe

> Lack of equipment/technology Ability to advance/general Lack of direction/communication Lack of software to d

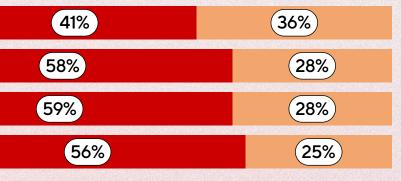
> > Staying on top Training/keeping skills up to date

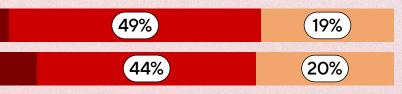
Staying motivated Keeping morale up Excessive job demands/difficulty managing work-life balance (13%)

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Base: Bases vary by statement





41%	36%
58%	28%
59%	28%

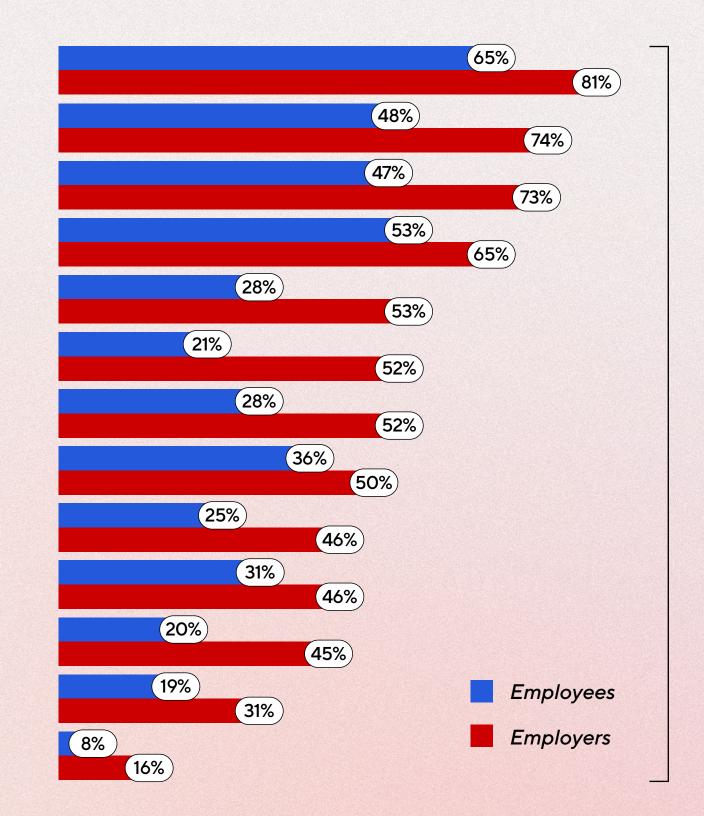
Challenges related to connection, relationship building and communication are consistently seen to be easier to manage in the office.

Work at home days provide employees with the flexibility they need to meet the demands of their job and improve morale.



Employers are more likely to see virtually all challenges better managed in the office - particularly those involving relationships and communication.

Work Challenges Most Easily Managed Working in the Office



% Easier to Manage in the Office

Building quality social relationships with people at work Feeling connected with your organization Effectively managing / supervising employees Communicating / coordinating with colleagues/employees Lack of direction/communication from management Keeping morale up Ability to advance in the organization / general career progression Lack of equipment / technology to do their job properly Lack of software to do their job properly Staying motivated Training / keeping skills up to date Staying on top of industry trends Excessive job demands / difficulty managing work-life balance

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Base: Bases vary by statement

Employers are more likely to say all challenges are better managed in the office.

What do Employers See **Differently?**

Employers lean heavily towards believing the office is a better venue for employees to manage problems they face at their work, and are notably more than twice as likely as employees to say working at the office is best to manage morale.

Employers may confuse cohesiveness and personal connections between employees with morale - employees recognize that the office is better for improving relationships, but rely on the flexibility to work from home as needed to keep their morale up.

[Employees] B7. For each of these challenges you are currently facing at your job, is the challenge easier for you to manage on days when you are working at home or in the office? [Employers] B7. For each of the difficulties you noted employees are facing at your company/organization, do you think they're better able to manage these challenges working from home or in the office?



While majorities of employers and employees see days worked at home as being optimal for managing work-life balance, employers significantly underestimate how much at-home days can improve employee morale.

Work Challenges Most Easily Managed Working in the Office

% Easier to Manage in the Office

	Excessive job demands / difficulty managing work-life balance
	Keeping morale up
	Staying motivated
	Training / keeping skills up to date
	Staying on top of industry trends
16%	Lack of equipment / technology to do their job properly
	Lack of software to do their job properly
13%	Communicating / coordinating with colleagues
16	Developing / Building quality social relationships with people at work
15%	Effectively managing / supervising employees
14%	Ability to advance in the organization / general career progression
13% 13%	Lack of direction / communication from management
13% 8%	Feeling connected with your organization

Base: Bases vary by statement B7. For each of these challenges you are currently facing at your jo home or in the office?

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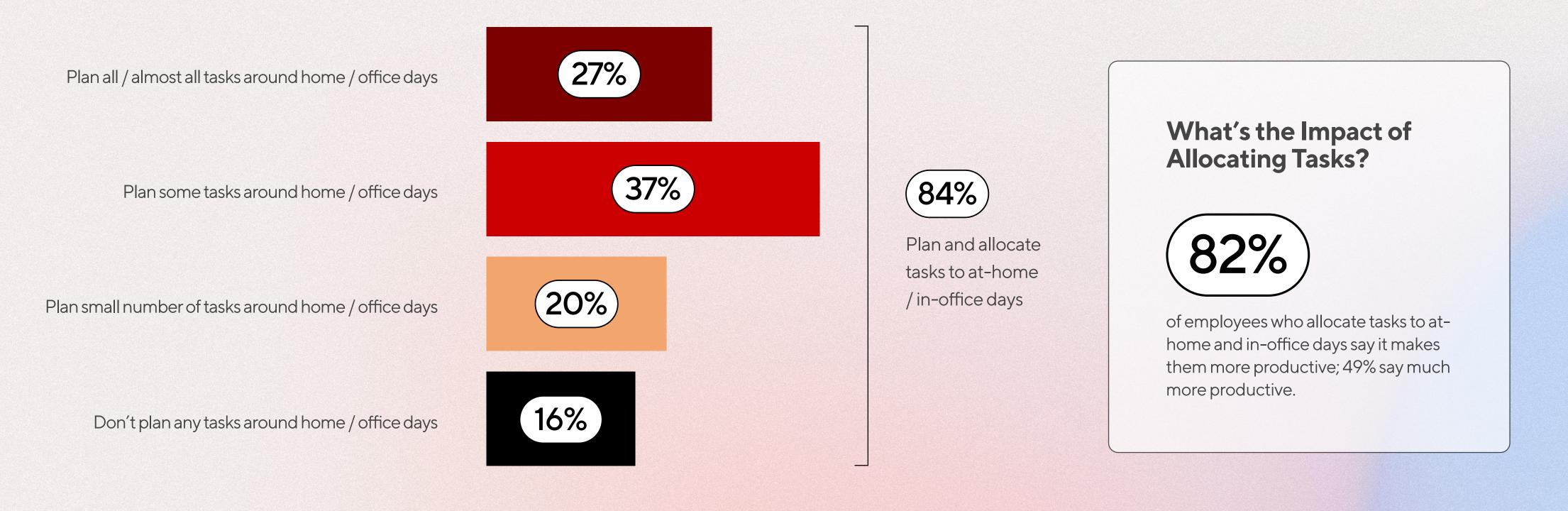


Significantly higher between employees and employers at 95% confidence



Most employees are allocating tasks between their at-home and in-office days, and are more productive for it.

Task Planning When Working At Home vs. In-office





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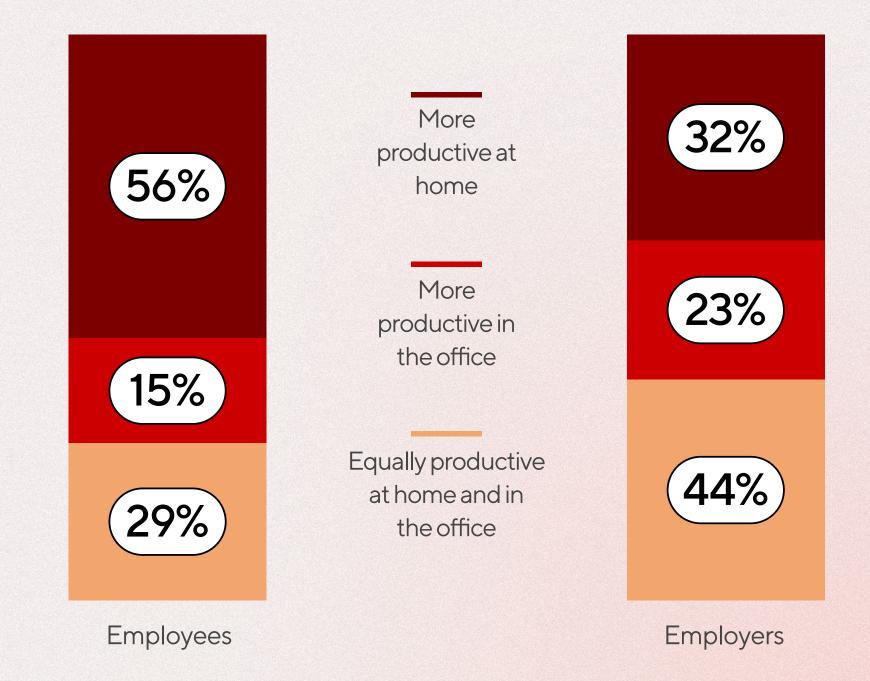
Base: Employees (n=1,004) C9. To what extent do you plan and allocate tasks to do on days you are working from home vs. days you are working in the office?

Among Employees



Over half of employees say they are more productive at home than in the office, but employers aren't of the same mind.

More Productive at Home or in the Office?





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Base: Employees (n=1,004), Employers (n=311) B10. Do you find that you are most productive on days when you work from home or when you work in the office? B11. Do you think that your productivity in the office will increase if you get used to working their more often?

Will in-Office Productivity Increase over Time?

Most employees and employers say no - 82% of employees that find they are more productive at home say their in-office productivity will not increase as they get used to working there more often.

Employers, however, are more optimistic - they are more likely to think employees' productivity at the office will improve as they work there more often.





Hybrid employees strongly appreciate special perks on days they are in the office. Meanwhile the need for flexibility remains and employees will have a better experience if they will be at the office at a time that suits them and have a space for focused work, free of distractions.

Improvements to In-Office Experience

Ranked Top 3 Among Employees





Comparison with hybrid work in 2022:

Hybrid workers continue to strongly value simple perks like free lunch or a social hour as a show of appreciation when they are in the office.

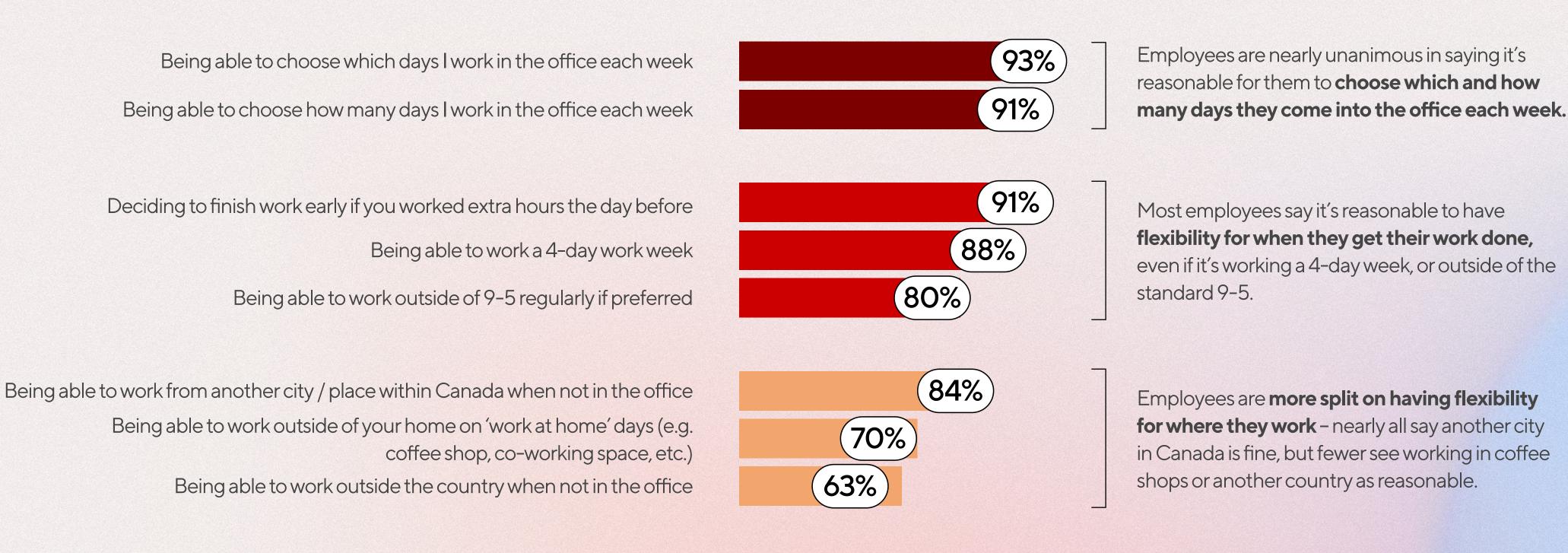
What's changed vs. 2022 as more employees are working hybrid models is employees have more of a desire to choose what days they come in the office, and to have a dedicated workspace free of distractions.



Employees resoundingly feel that having flexibility for when they come into the office and when they get their work done are reasonable expectations.

Reasonableness of Work-Related Expectations

% Yes Among Employees

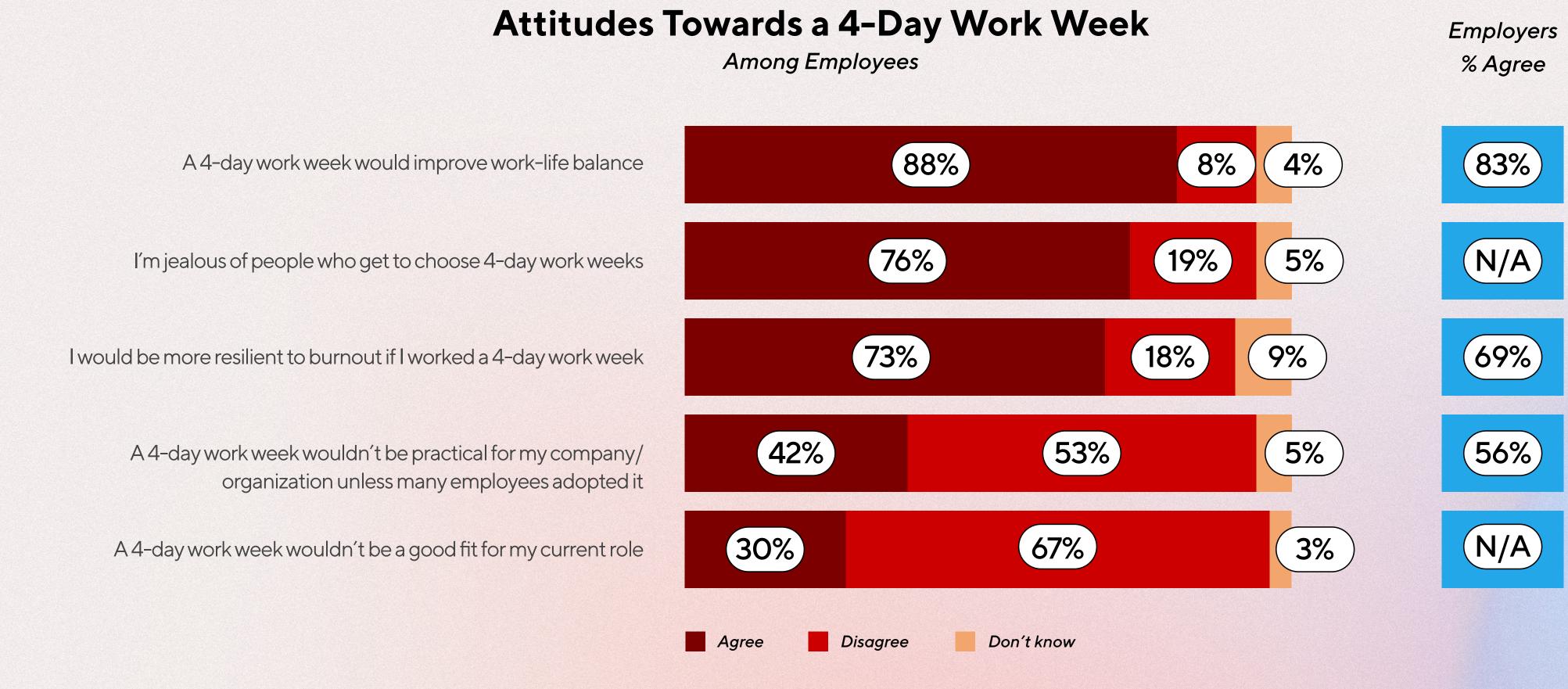


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Employees widely agree that a 4-day work week would improve work-life balance; three quarters say it would make them more resilient to burnout.



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Base: Employees (n=1,004), Employers (n=311)

C5. Thinking about a 4-day work week specifically, to what extent do you agree or disagree with the following statements?









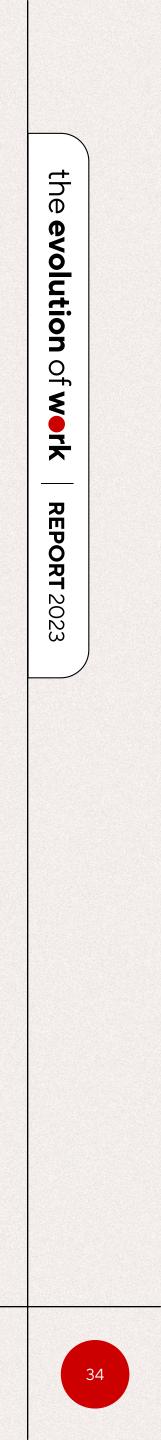


As employees note excessive job demands and managing work-life balance as a top challenge for them, it is having significant consequences on both their outputs and attitude towards work. Nearly half of employees (47%) report experiencing at least some burn out and these employees are twice as likely to feel drained, work out, and to talk about their jobs negatively. Companies having employees persistently burnout will have employees with less energy and engagement in their work, and who are more likely to churn.

Many employers and employees understand the need for collaboration to tackle burnout with just over half in each camp noting it's both leadership's and employees' responsibility to manage burnout, however both groups also tend to shoulder more responsibility than they need to. Employees are more likely to say it's their responsibility to manage burnout, and employers are more likely to say its managements' responsibility to manage burnout.

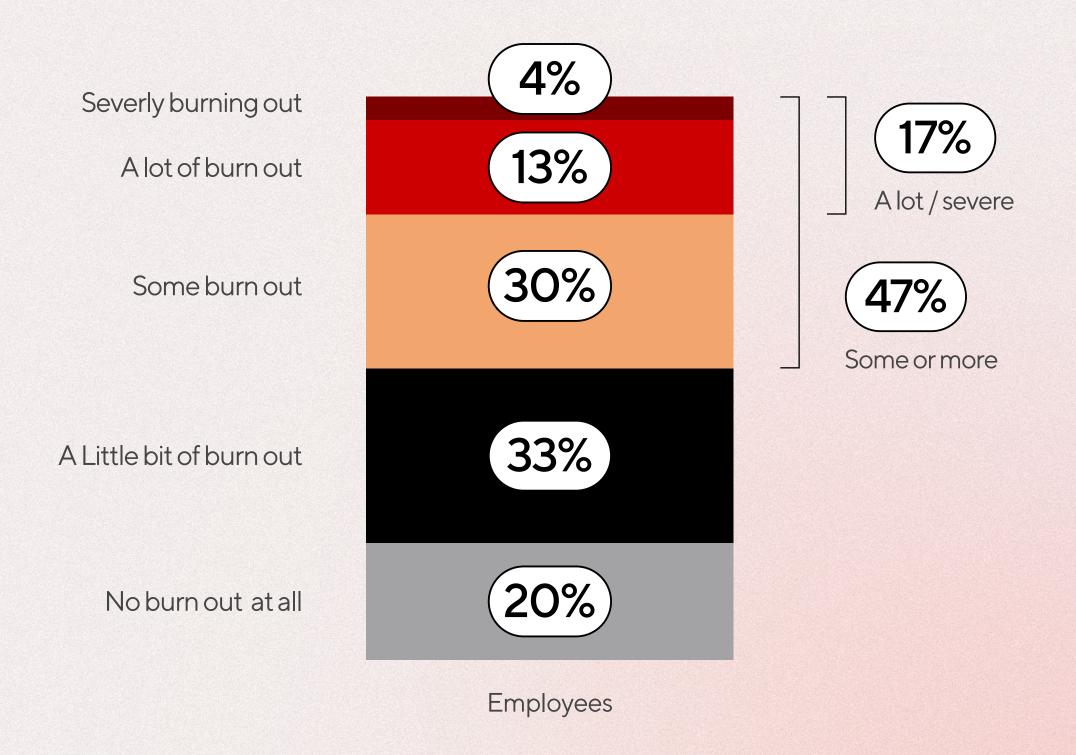
These expectations for who's responsible for burnout show a willingness to tackle the issue among both employees and employers that may be missed if both groups are trying to manage it on their own.





Nearly half of employees are noting at least some levels of burnout; 17% say it is high or severe. Meanwhile employers estimate that three-in-ten employees at their company are experiencing significant levels of burnout.

Experiences with Burnout Among Employees





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Employers estimate that approximately 30% of the employees at their company are currently experiencing significant levels of burnout

Longer-tenured employees are reporting higher levels of burnout, with the 3-year mark being where burnout levels increase (52% of employees with 3+ years at their current companies are experiencing burn out vs. 34% of newer employees.

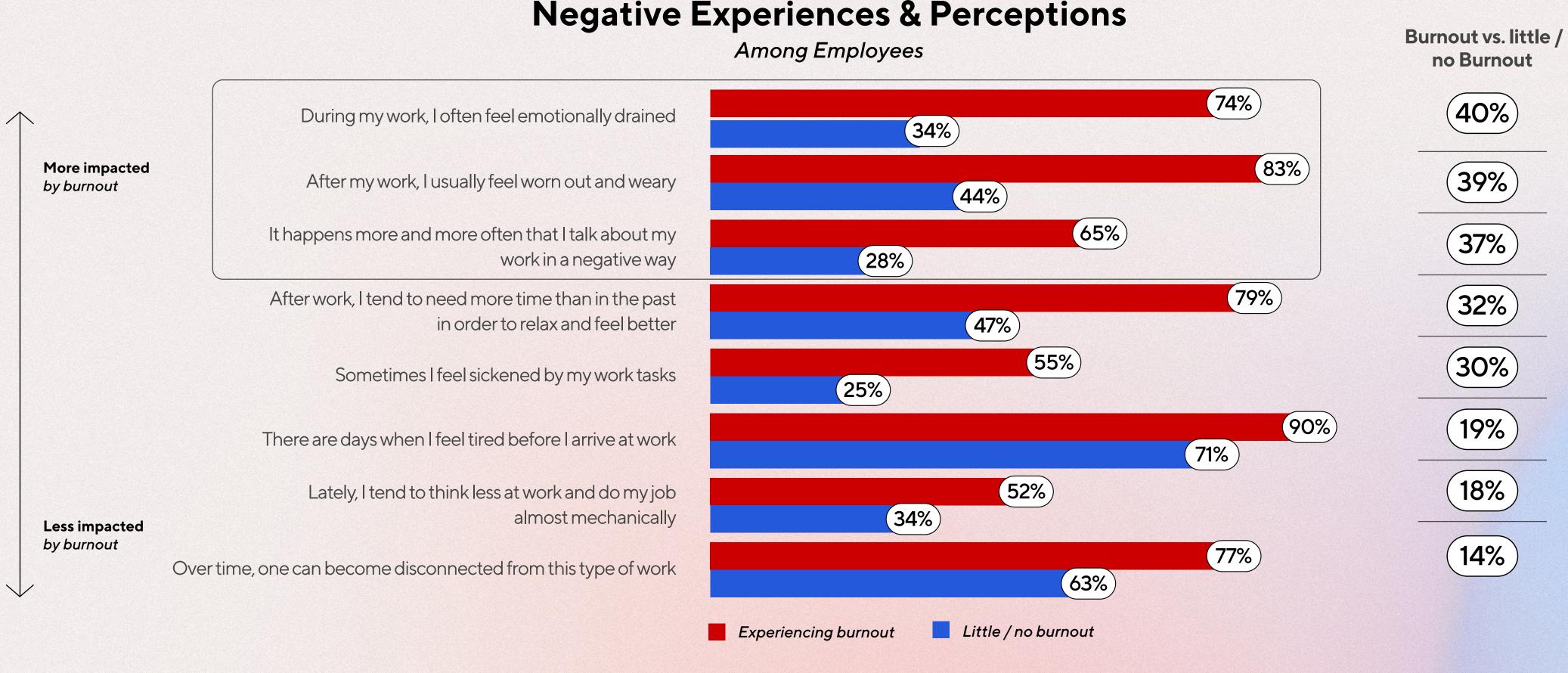
Base: Employees (n=1,004), Employers (n=311)

D1. To what extent, if at all, would you say you are currently experiencing burnout at your job?

D1A. Approximately what proportion of employees at your company do you think are currently experiencing significant levels of burnout?



The 47% of employees noting burnout in their jobs are twice as likely to feel emotionally drained, worn out or talk about their work in a negative way.



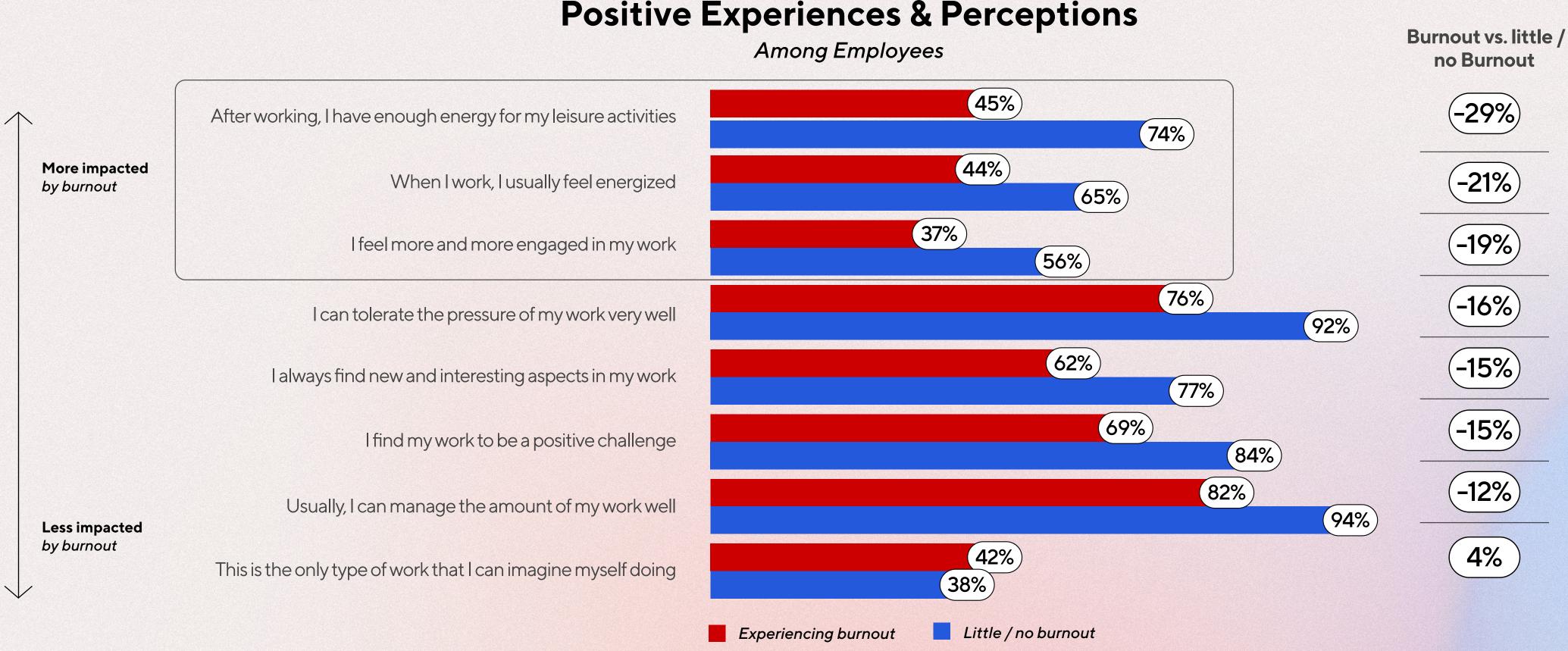


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Base: Employees (n=1,004)



Employees experiencing little to no burnout are more energized for both their personal hobbies and job. They are also more engaged with their work.

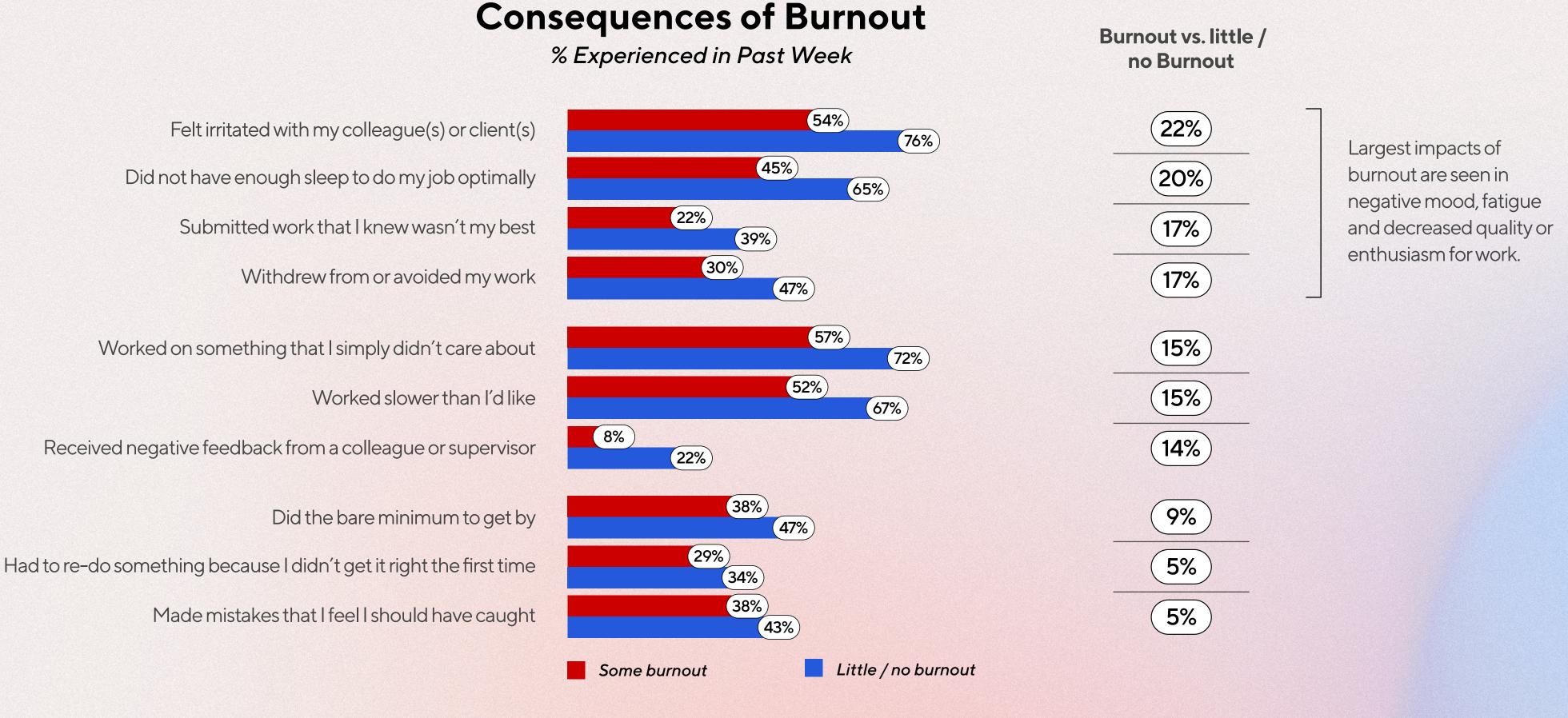




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While all employees report some negative experiences or disengagement with their work, those experiencing burnout struggle at significantly higher rates. Having employees burning out harms company culture and productivity as employees become more irritable and less invested in their work.



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Base: Employees (n=1,004); Self described burnout - Some burnout or higher (n=473), Little/no burnout (n=531) D3. Have you experienced any of the following related to your work in the past week?



Many employees and employers alike see shared responsibility for employees and employers in managing burnout. However, while employees are more likely to emphasize their own responsibility, employers likewise are more likely to point to themselves (management) as responsible.

Primary Responsibility for Managing Burnout





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Base: Employees (n=1,004), Employers (n=311) D4. To what extent do you see managing burnout as the responsibility of yourself vs. your employer?

Whose Responsibility Is It?

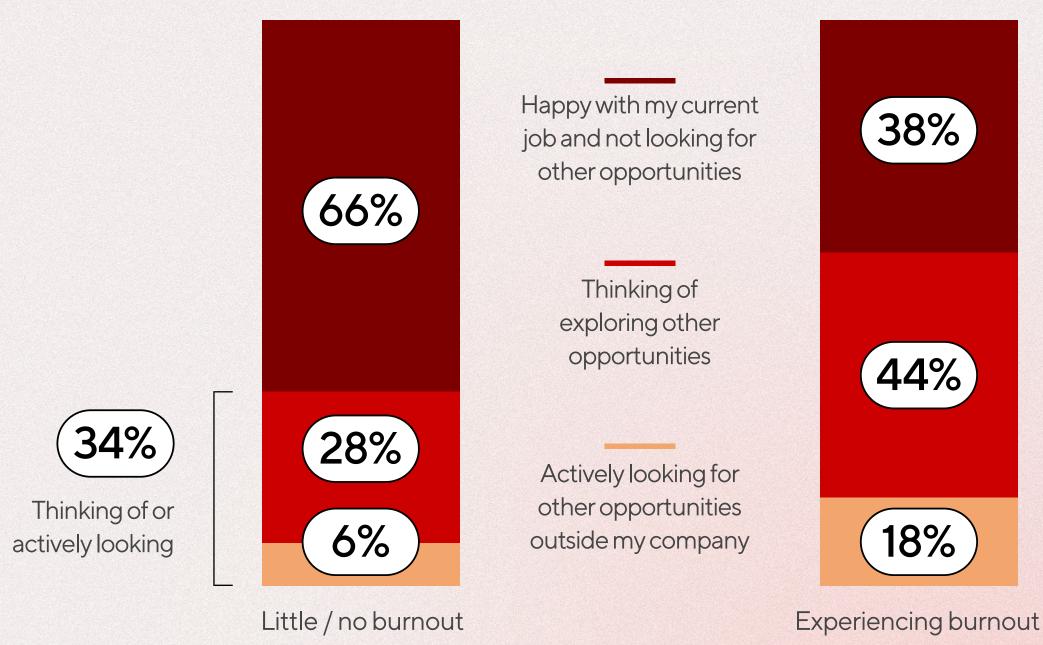
Employees and employers alike tend to shoulder the burden of addressing burnout on themselves.

Despite potentially reducing conversations about burnout, this dynamic shows that both employers and employees are willing to address the problem. Solutions to mitigating burnout are likely best managed collaboratively, and both employees and employers are willing to chip in.



Employees burning out are nearly twice as likely to be considering other jobs; three times as likely to be actively looking.

Seeking New Job Opportunities





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Base: Employees (n=1,004), Employers (n=311) D4. To what extent do you see managing burnout as the responsibility of yourself vs. your employer?



Thinking of or actively looking

Is Burnout Causing Churn?



Half of employees experiencing burnout and considering new opportunities say burnout is a major or the largest factor behind this, and nearly all (89%) say it is at least somewhat of a factor.

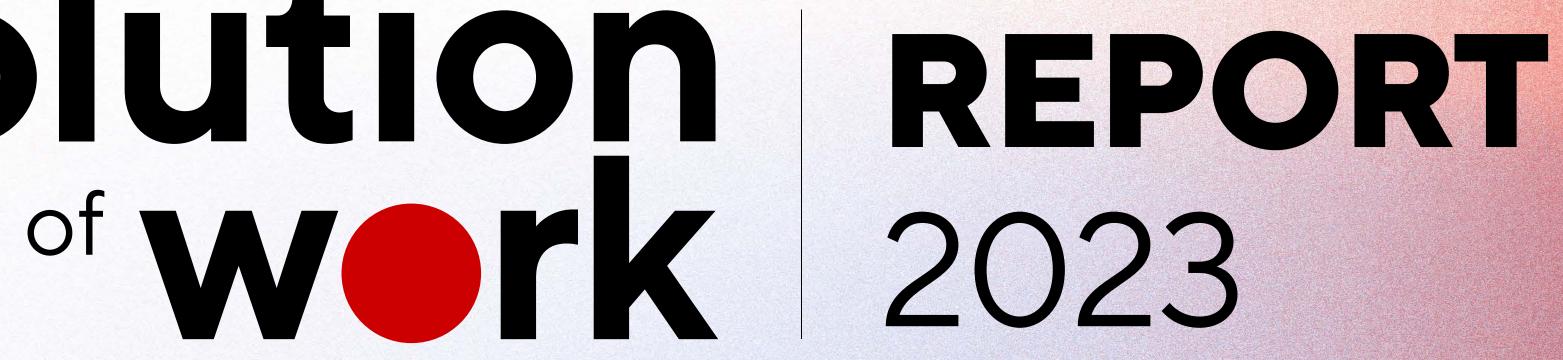


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