



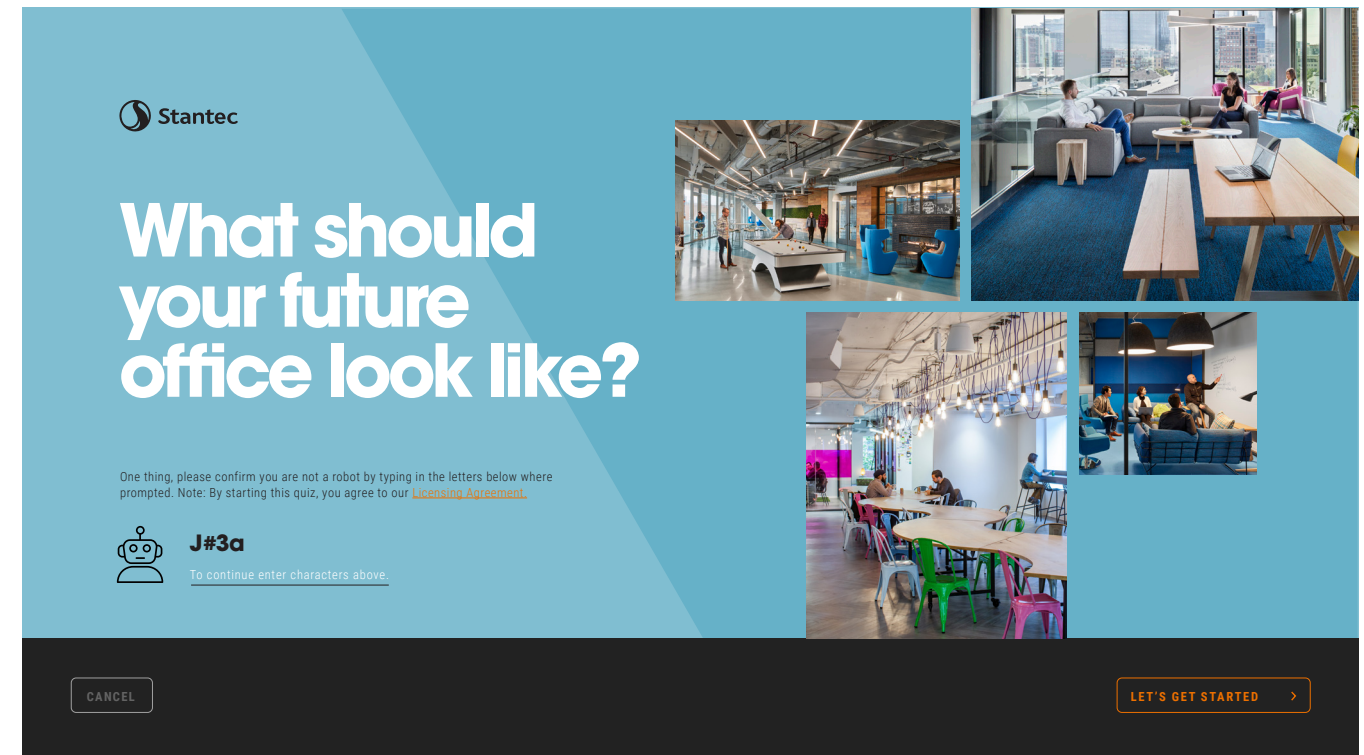
BlueSky Survey

EXECUTIVE SUMMARY



Introduction

Stantec gained insight on clients' experience during the early phase of the Covid-19 pandemic through our Workplace Transformation Survey conducted in May, 2020. In November 2020, the Bluesky quiz was developed to follow up with our clients, it was also made available on social media platforms accessible to the public. This report is a summary of data gathered from the quiz.



STANTEC: BLUESKY QUIZ



Objective

To gain insight into employee needs and expectations for the future workplace and to understand to what degree it might differ from their pre-pandemic offices.

Multiple research projects on the impacts of Global Work From Home policies due to the pandemic consistently indicated that employees desire the flexibility to work outside the office post-pandemic. Assuming a broad adoption of a “Hybrid” workplace model, Commercial Real Estate experts have predicted a decline in the need for office space in the future, and an increase in the percentage of space allocated to “collaboration.” Yet little research had been done to understand anticipated needs of the actual user—the employee.



Methodology

Answers to questions provided data on three factors:

- Perception of company and current workplace
- Personal workstyle
- Future workplace spaces and function

Answers were scored on the following:

Formal → Informal

Fixed → Flexible

Individual → Collaborative

Response scores fed an algorithm, giving the participant a—one of four—hypothetical workplace models ranging from a very traditional and office-centric plan to a highly mobile, collaboration space-centric plan.



TRADITIONAL PLAN



PROGRESSIVE PLAN



ACTIVITY-BASED PLAN

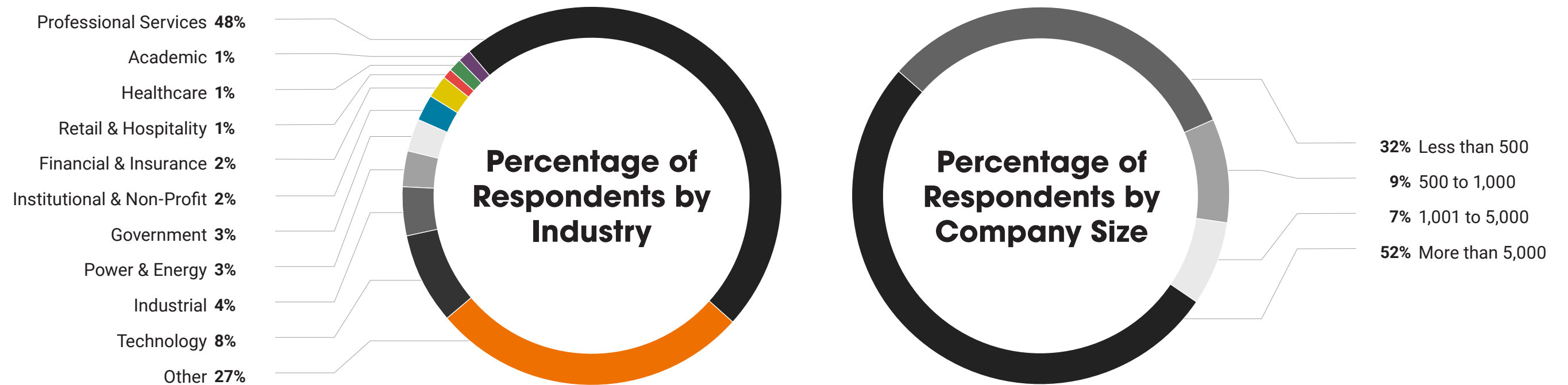


FUTURE PLAN

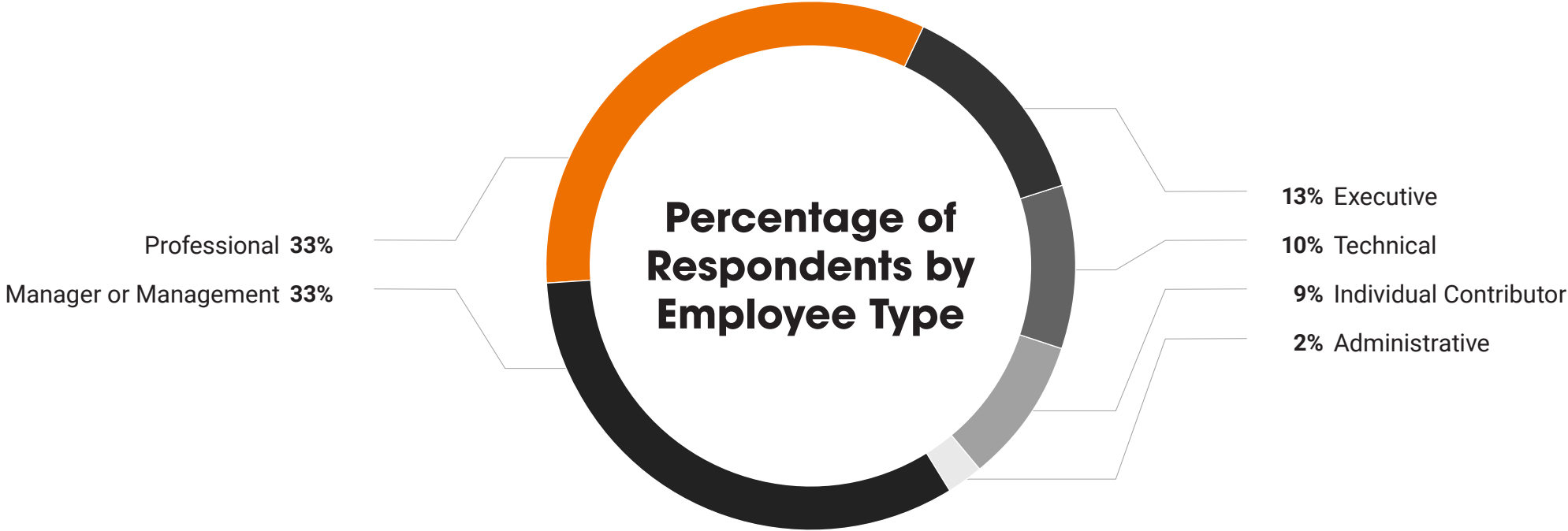


Data Collected

Respondents represented many industries, but primarily identified as being in Professional Services or “Other,” and from either very large or relatively small businesses.



There was participation from a broad cross-section of employee type—from Executive to Individual Contributor.



Key Findings

Employees do not envision the dramatic change to workplace that the industry anticipates.

The industry forecasts a decrease in personal or focus space and a rebalancing to accommodate face-to-face collaboration. However, employees' top priorities when they return are having social spaces as well as having their own desk.

Employees are generally satisfied with their current workplace.

They anticipate and desire increased flexibility in where they do their work, whether that is in or out of the office. However, they don't anticipate dramatic change to the office. i.e. trading individual personal space for more collaborative, shared spaces.

But they want to see the workplace change

Along with a desire for flexibility to work outside the office, their preferences in types of office spaces indicate a desire for choice within the office.

Expectations and needs vary by industry

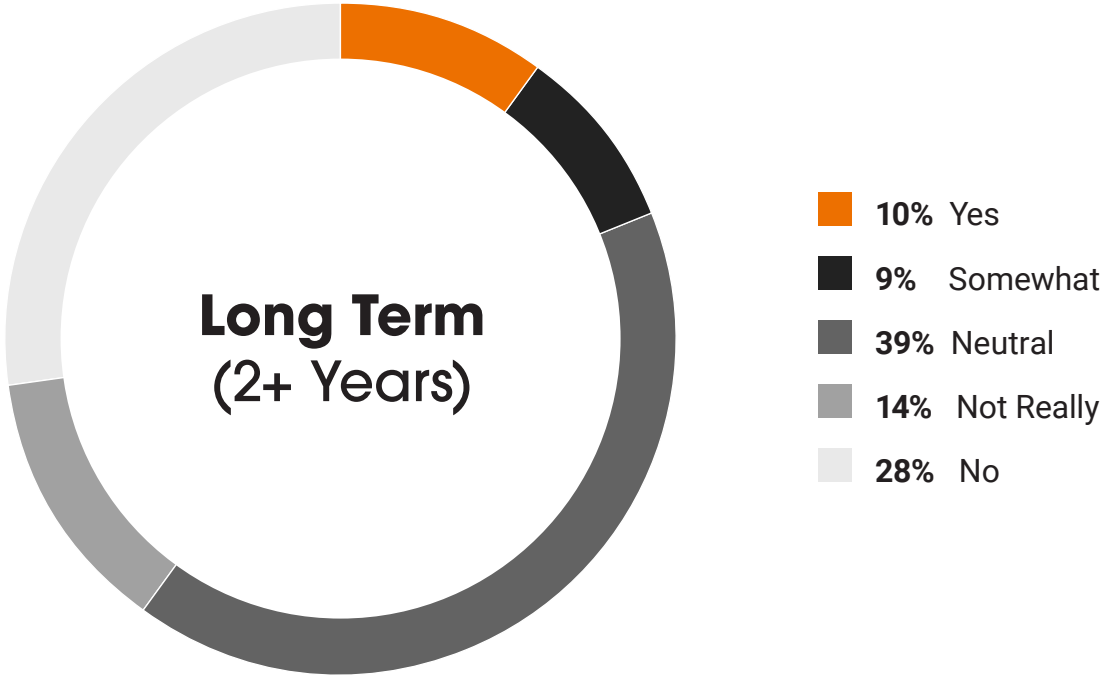
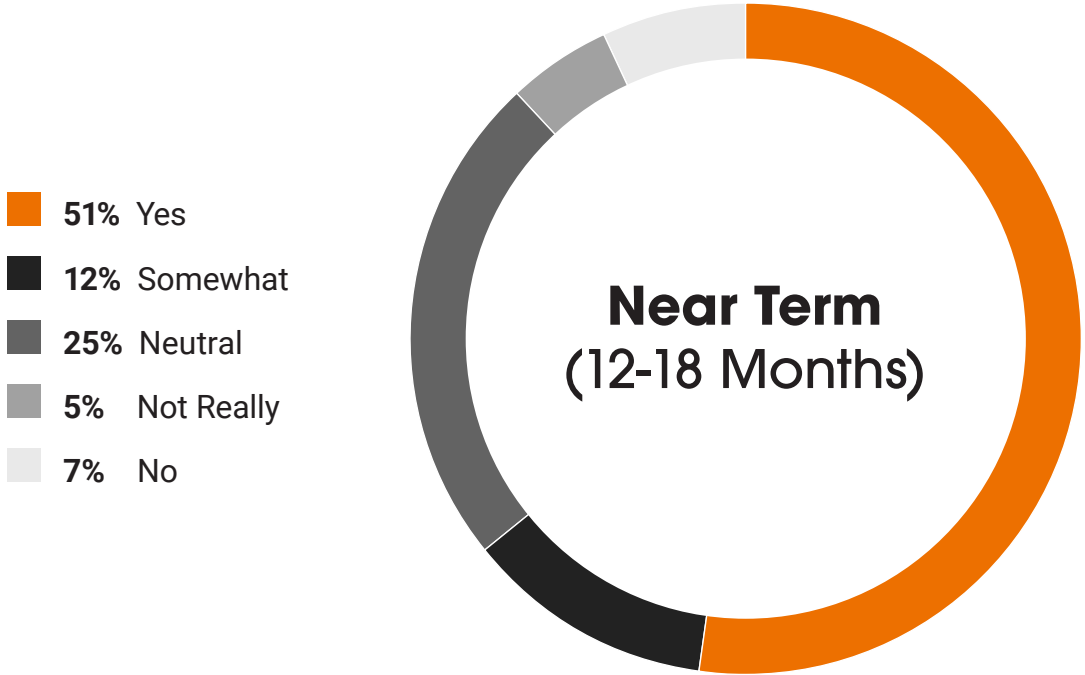
As there is no "one size fits all" solution for office design even in the pre-pandemic workplace, we see variations by industry in future expectations.



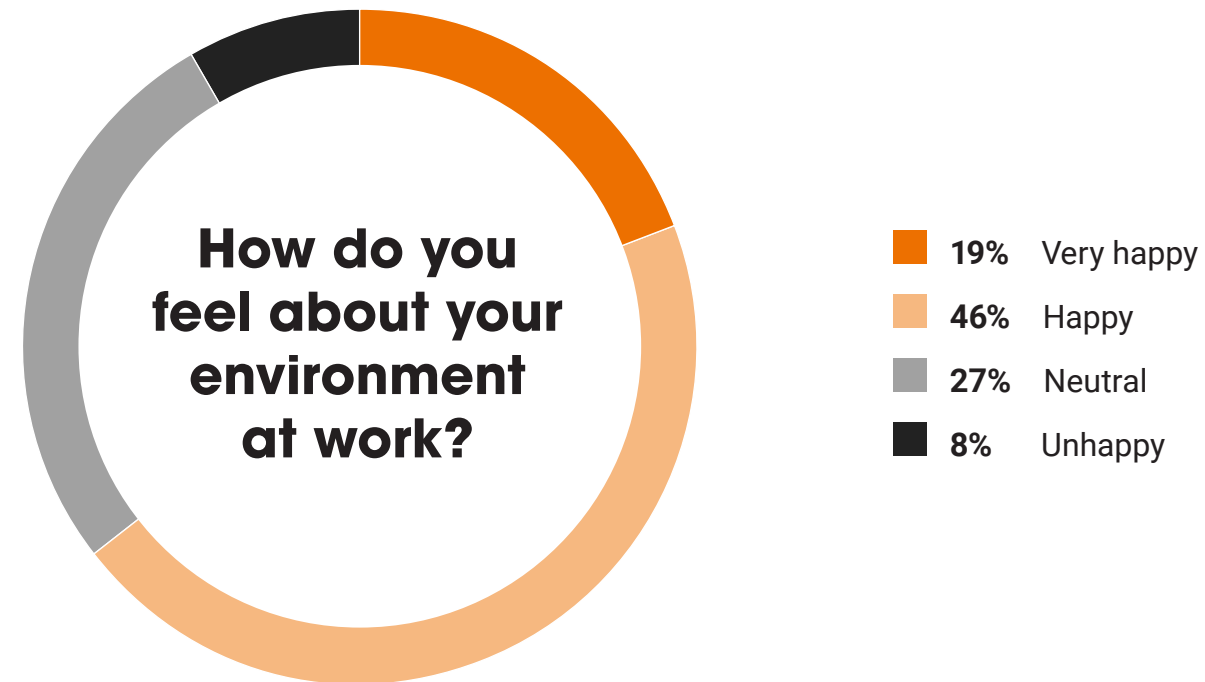
Our attitudes about social distancing may change over time.

FROM THE STANTEC BLUESKY SURVEY

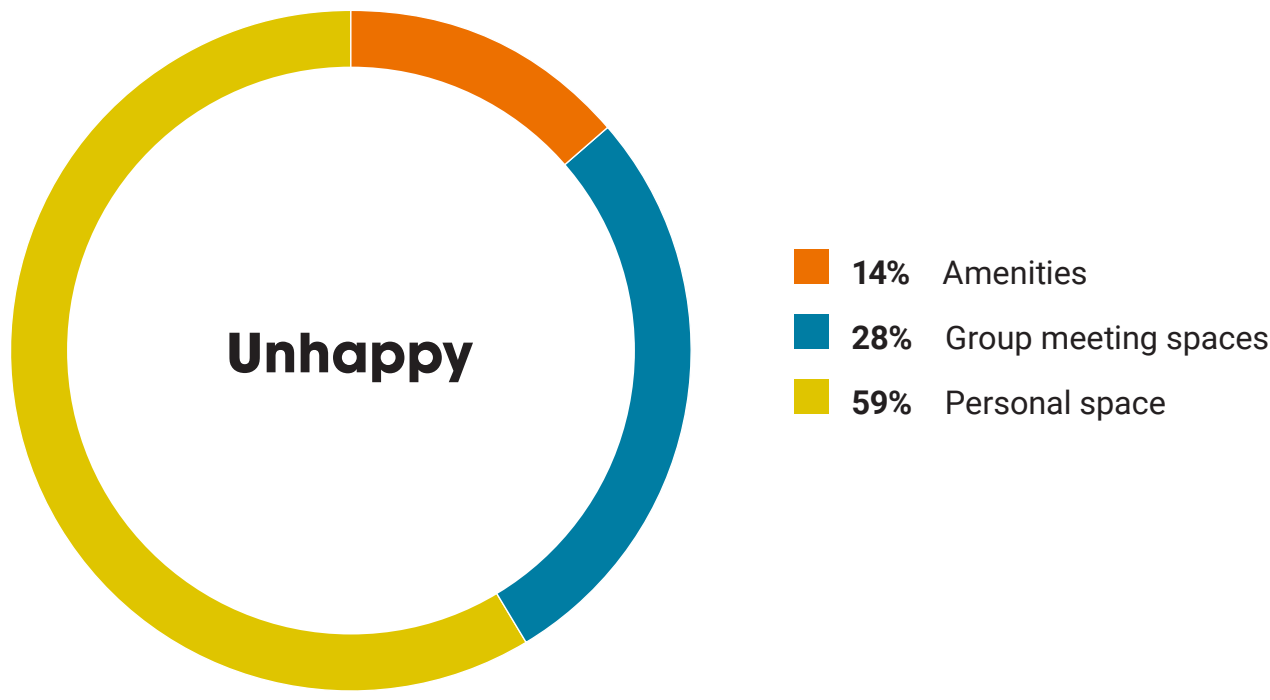
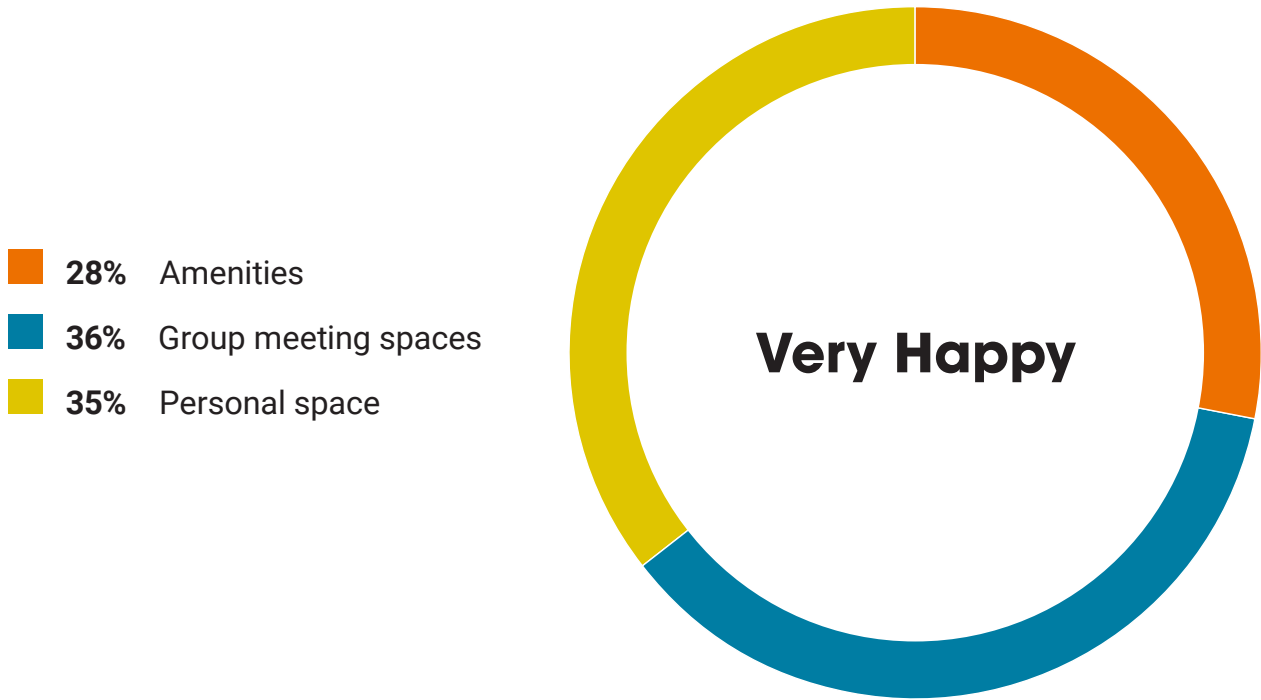
“Social Distancing at work is important to me...”



Most are satisfied with their current workplace environment.



Those most satisfied report variety and balance of spaces in their workplace.



**However when presented
with options, employees would
like to see **change.****



They describe their current collaboration spaces as “Formal”. They have...

47%



FORMAL CONFERENCE ROOMS

28%



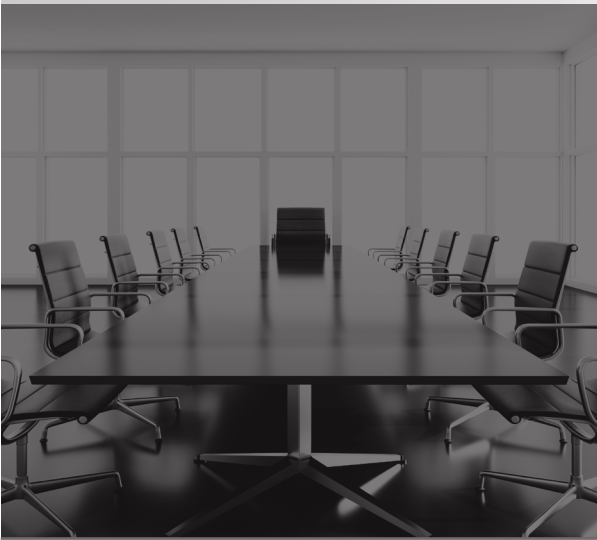
INFORMAL MEETING SPACES



But they really want more informal, ad-hoc spaces to support the variety of ways they engage with others.

Brainstorming, Co-Authoring, Mentoring, Presentations, Conference Calls

7%



FORMAL CONFERENCE ROOMS

82%

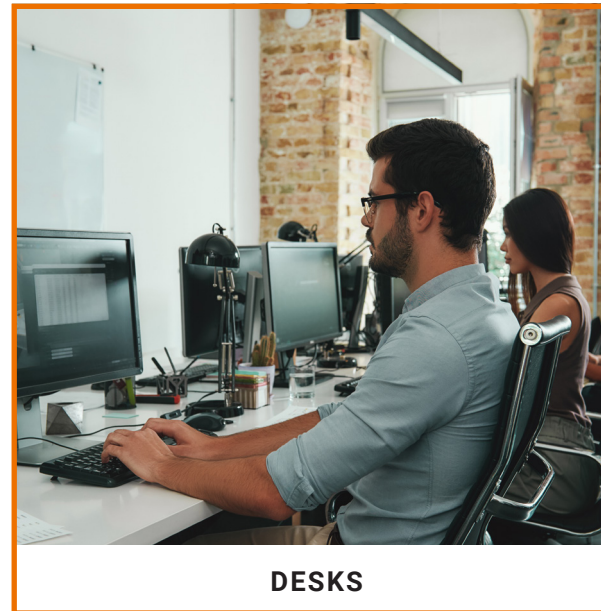


INFORMAL MEETING SPACES

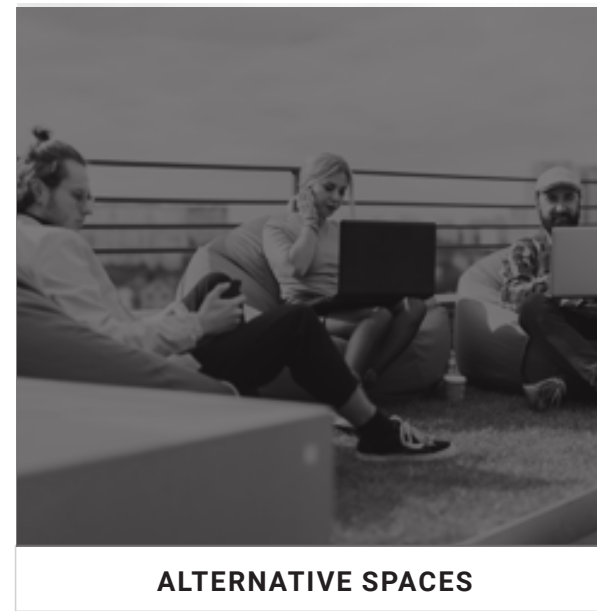


Similarly, they would like to see more variety in spaces for individual work. They have...

78%



6%



They seek a balance of spaces to support the range of highly-focused to more task-based work they perform.

41%



31%



Workplace transformation will require **cultural change**.

Only about **half of respondents** described their company as demonstrating characteristics that support a successful workplace transformation.

50%



VS. RIGID

50%



VS. TRADITIONAL

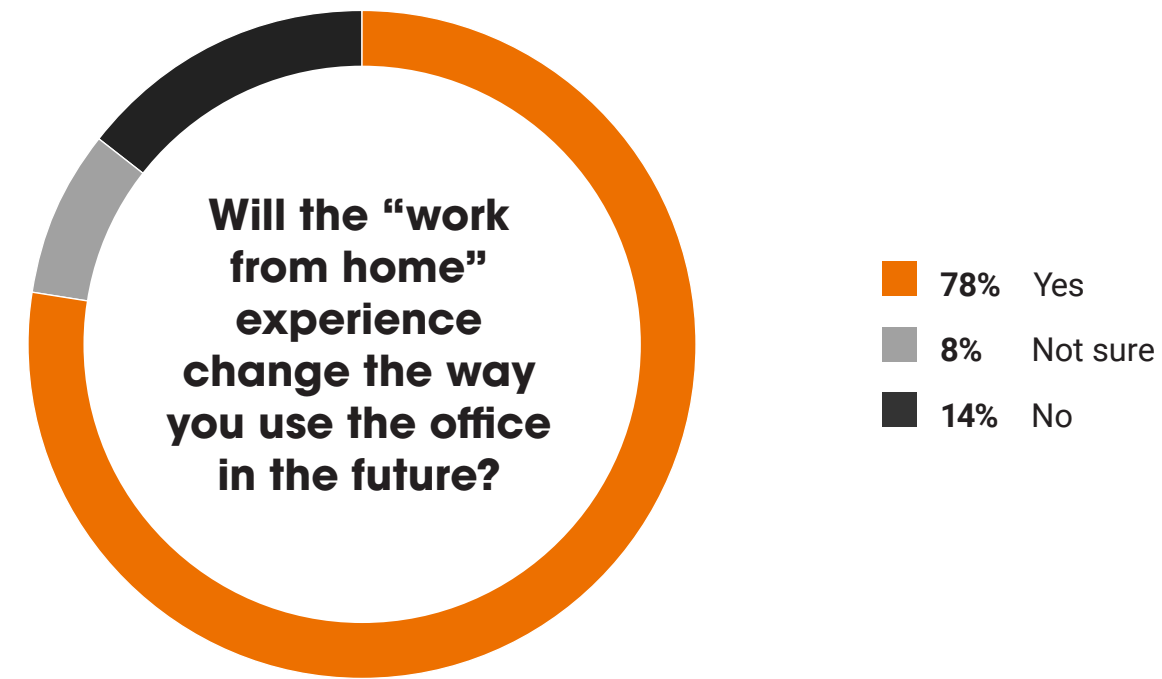
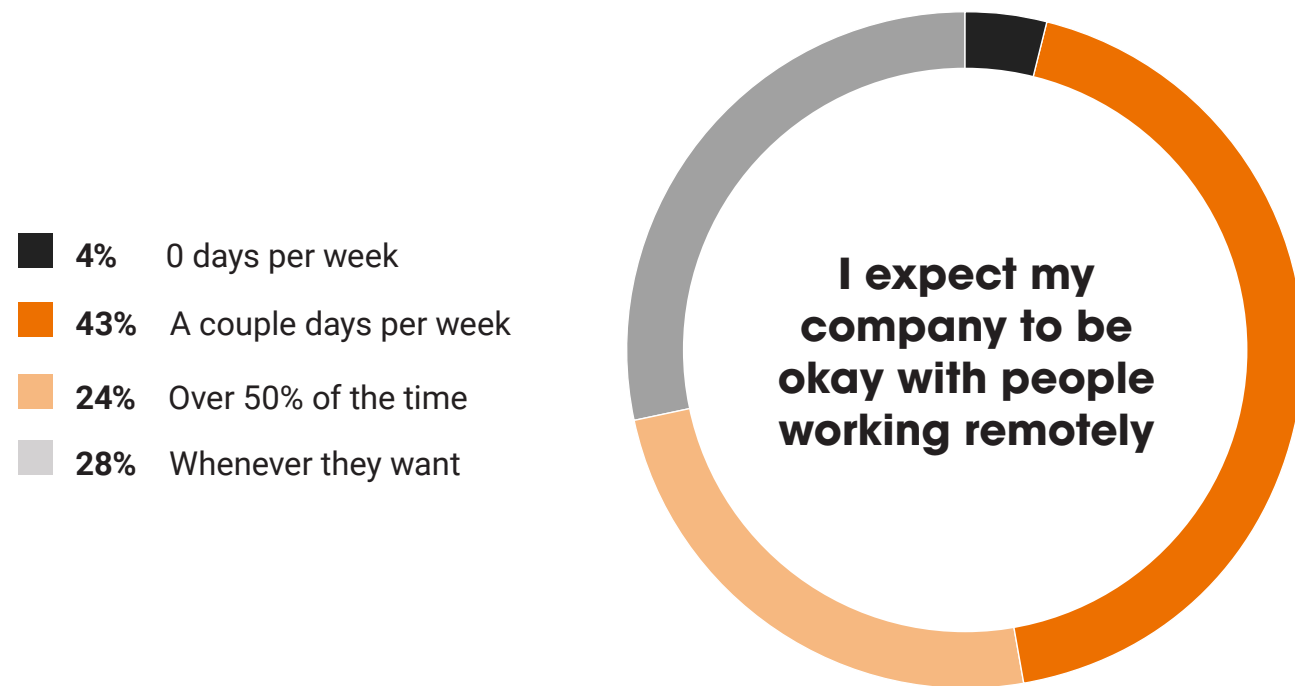
56%



VS. ANALOG

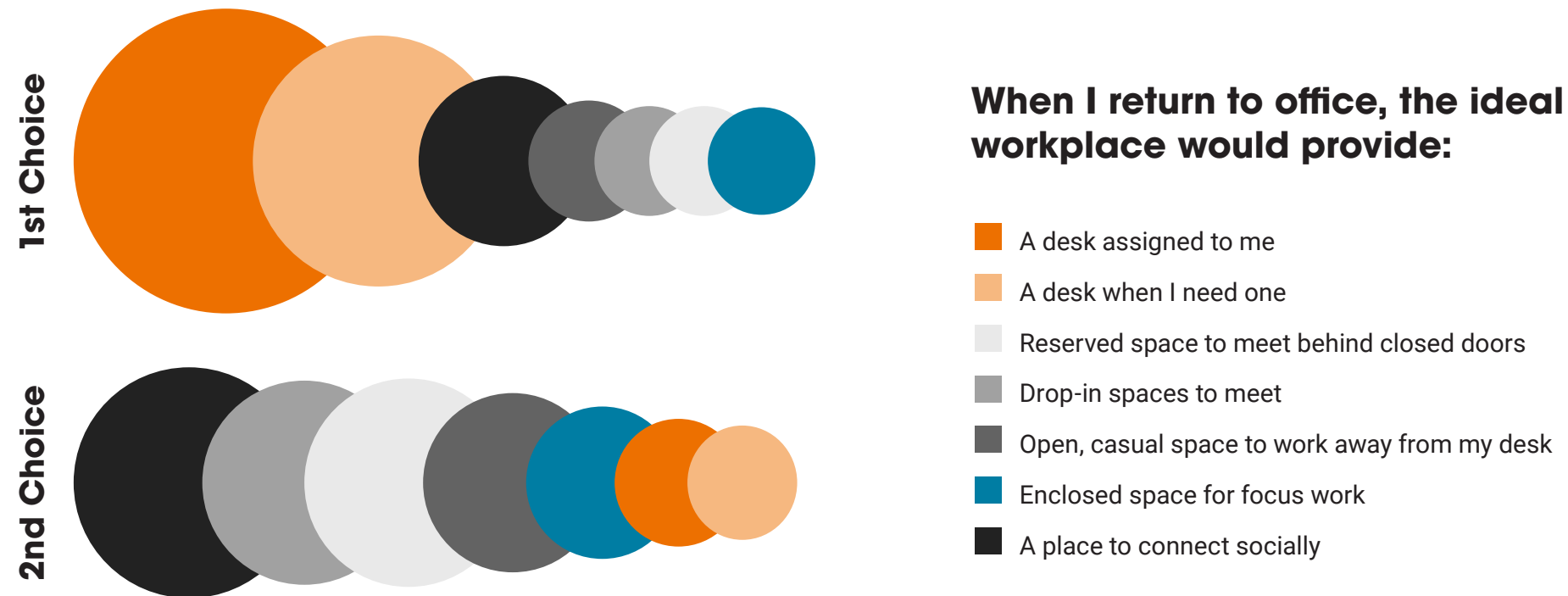


Employees expect that where they work and how they work will change.

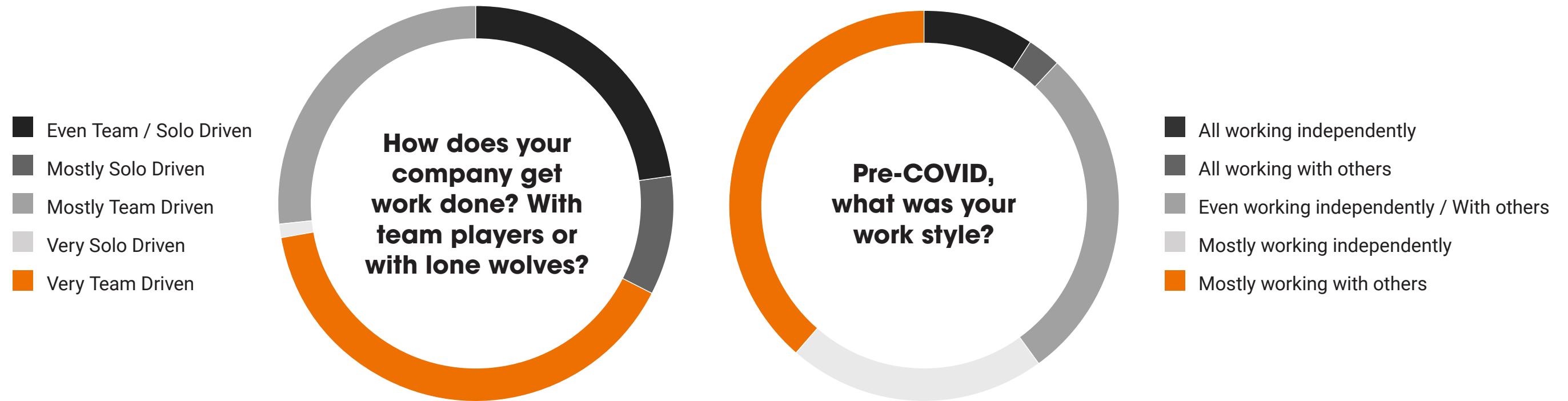


Yet they don't envision dramatic change to what the office will provide.

Employees still want their own desk in the future office and spaces for social connection.



Though individuals consider their own work a balance of individual and collaborative effort, they believe their company is driven by collaboration.



CONNECTION DRIVES COLLABORATION

Collaboration and connection are key to organizational effectiveness and have not been fully supported in a virtual way.

89% are looking forward to a return to the office.

because they miss...

73% Face-to-Face collaboration

63% Social interaction

STANTEC WORKPLACE TRANSFORMATION SURVEY



The High-Performance Workplace plays a **critical role** in organization success.

Our research, as well as data from third parties, supports the premise that a positive workplace experience benefits not only the employee, but directly contributes to company performance.

Leadership must consider the role of the office with regards to...

Employee's sense of belonging and engagement

Effective Collaboration

Supporting choice and flexibility

...and design an environment that meets the unique needs of their business and the way work gets done.



CONNECTION DRIVES COLLABORATION

93%

of Senior Executives surveyed agreed that a sense of belonging drives organizational performance—one of the highest rates of consensus on importance we have seen in a decade of Global Human Capital Trends reports.

GLOBAL HUMAN CAPITAL TRENDS
2021, DELOITTE

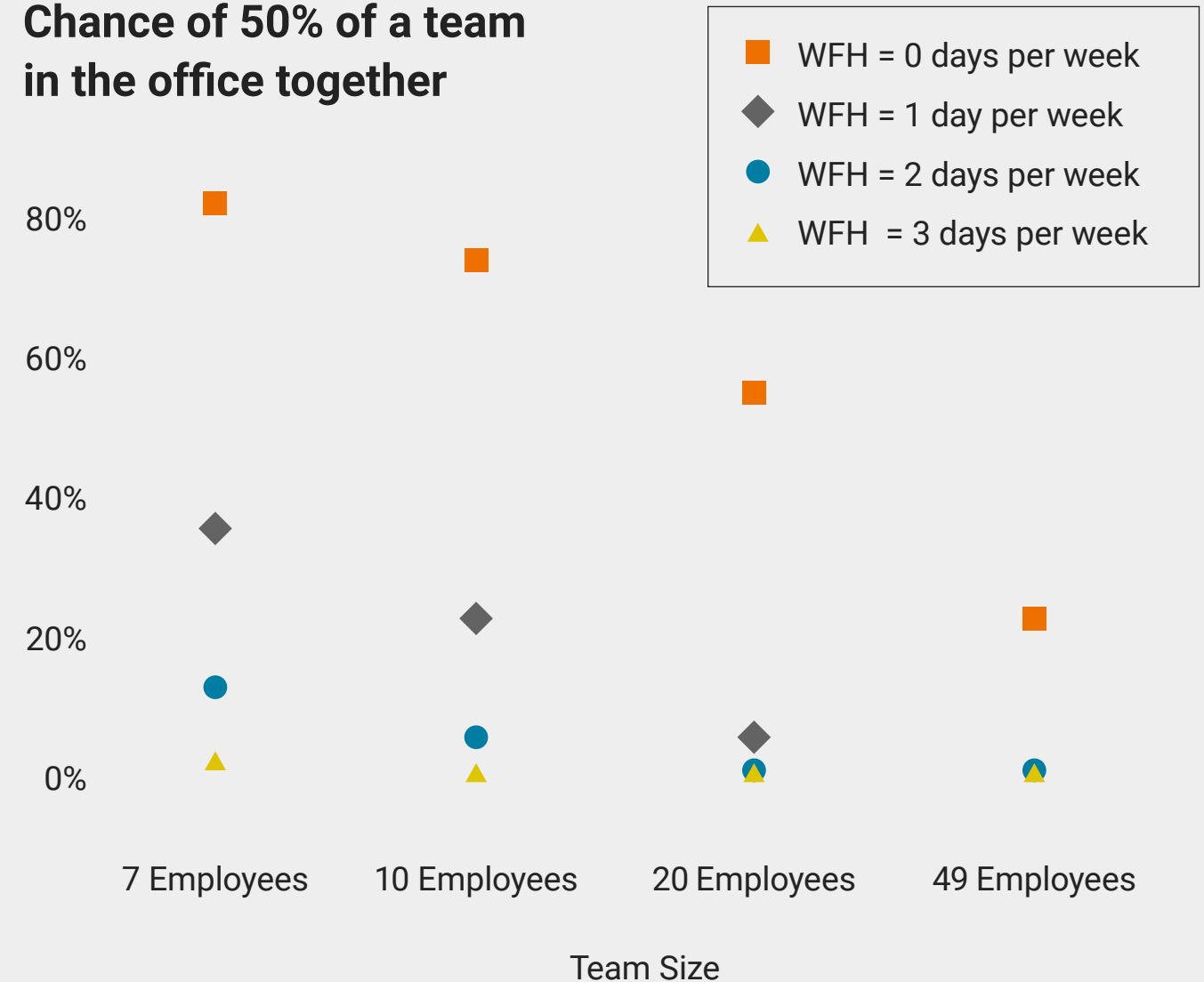


Random Work-From-Home patterns will prevent us from achieving that Face-to-Face experience we desire.

Expectations and policy around remote work will need to be clear. But at the same time, there is an opportunity to evaluate and ensure that the office environment becomes a magnet—a place employees are drawn to—that supports [culture](#), [engagement](#) and [satisfaction](#).

“WORKPLACE ECOSYSTEMS OF THE FUTURE” BY THE CENTER FOR REAL ESTATE & URBAN ANALYSIS, GEORGE WASHINGTON UNIVERSITY WITH CUSHMAN WAKEFIELD

Chance of 50% of a team in the office together

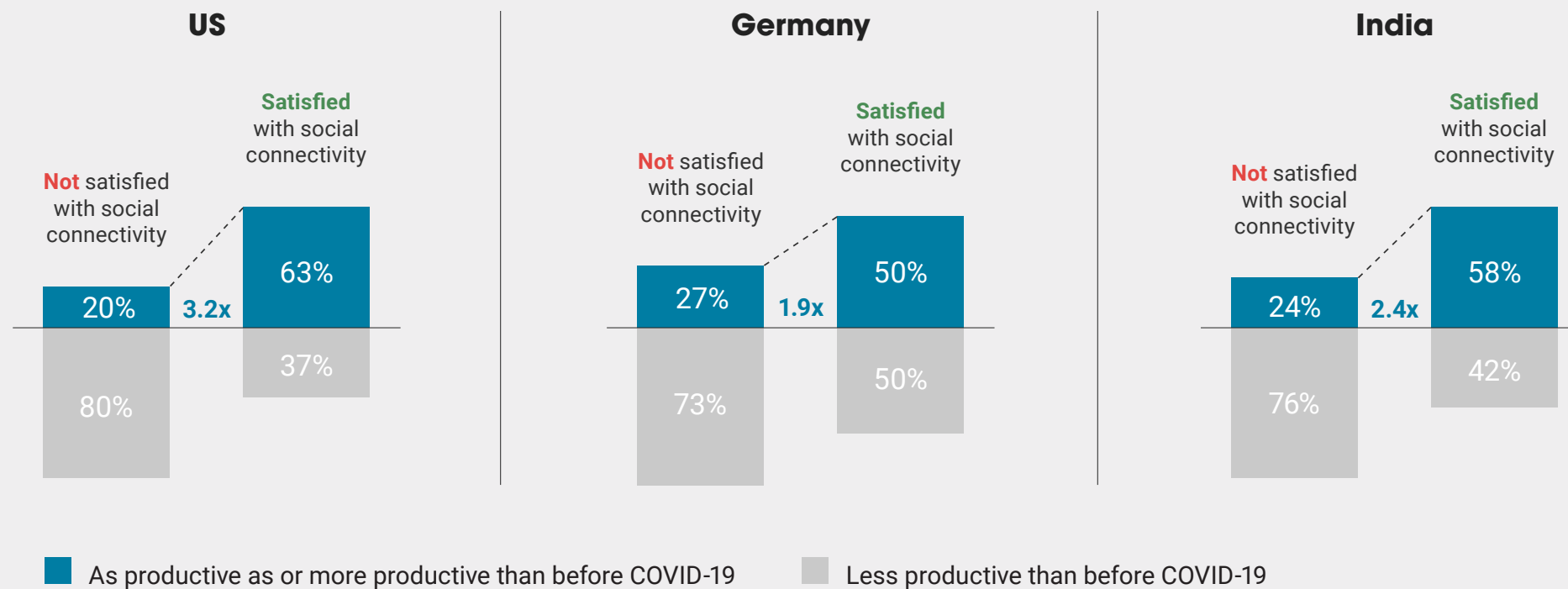


Employees satisfied with social connectivity are more likely to maintain or improve productivity on collaborative tasks.

SOURCE: BCG COVID-19 EMPLOYEE SENTIMENT SURVEY, MAY 21-JUNE 13, 2020 (N = 12,662 IN THE US, GERMANY, AND INDIA), UNWEIGHTED, REPRESENTATIVE WITHIN ±3% OF CENSUS DEMOGRAPHICS.

Note: Respondents were asked to rate their satisfaction on two questions: "Overall, how have you felt about your level of connection to your colleagues during the COVID pandemic?" and "How productive have you been across different aspects of work during the COVID pandemic compared to before?" These results illustrate observed correlations between responses to both questions.

"Hybrid is the New Remote Work", Boston Consulting Group, 2020



Employee workplace satisfaction directly correlates to engagement, satisfaction and retention.

“DESIGN LEVERAGED”
BY BRANDWARE RESEARCH

Highly satisfied with their workplaces

Less satisfied with their workplaces

“My organization cares about my opinions.”

63% agreed
 20% agreed

“If I have my own way, I will be working here a year from now.”

47% agreed
 17% agreed

“How often do you offer ideas to improve organization functioning?”

51% agreed
 23% agreed

“My organization is innovative.”

61% agreed
 21% agreed

“I frequently think of quitting.”

40% agreed
 15% agreed

“In general, I like working here.”

80% agreed
 33% agreed

“How often do you willingly give your time to others who have work-related problems?”

29% agreed
 13% agreed

“How often do you take action to protect your organization from potential problems?”

28% agreed
 10% agreed

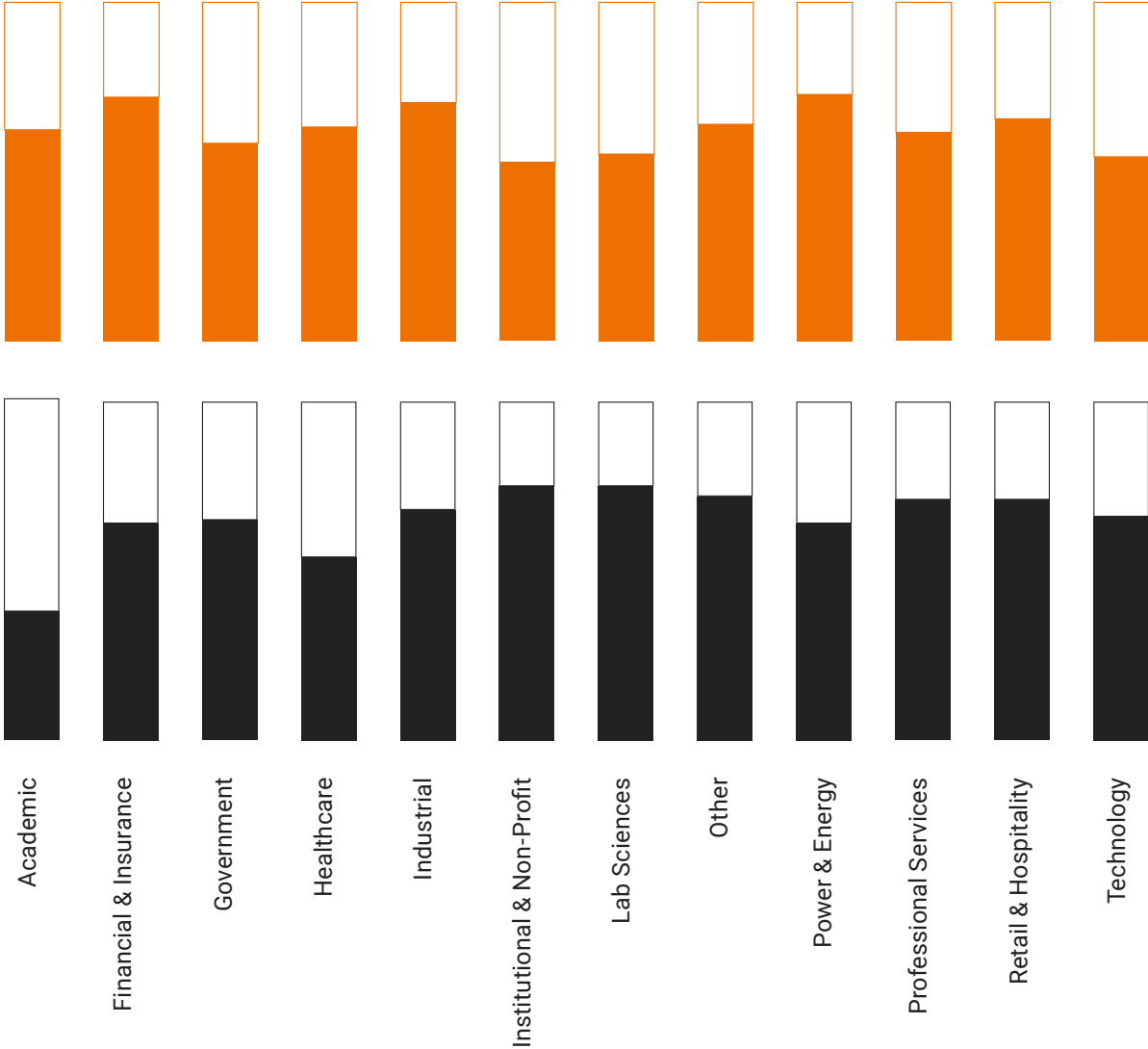
“My managers are receptive to big ideas that might change how we do business.”

57% agreed
 19% agreed



One size does not fit all...

Some questions in the survey contributed to a score measuring the respondent's perception of their company's "flexibility" to embrace remote work or if their work is "fixed" within the office. Additionally, companies were scored on their reliance on individual or collaborative efforts for success.



Looking forward

The workplace will evolve

- Space will be rebalanced from personal space to amenities/collaboration spaces
- To what degree will vary by industries and organizational culture
- Real Estate utilization will be impacted due to density and new metrics
- Planning will include a focus on flexibility and choice

Adoption of a Hybrid work model will affect more than space.

- Technology and infrastructure must create a seamless experience for those in or out of the building
- The incorporation of Smart Building technologies will promote efficiencies and support a flexible and agile hybrid work environment
- Management strategies and performance metrics will evolve;
 - From presentism to performance
 - Active and intentional management communication vs “management-by-walking-around”
 - Onboarding, mentoring and coaching of remote workers will require new strategies.

