



**STAPLES**

Business Advantage™

# 2016 Workplace Index

March 2016

MORAR

A leap of insight



# Contents

Topics covered in this report

1. Initial topline findings
2. Profiling
3. Employee Recruiting & Retention
4. Workplace Flexibility
5. Happiness at Work
6. The Freelance Economy
7. Telecommuting
8. Workplace Productivity
9. Workplace Innovation & Technology
10. Office Design – Personalisation
11. Wellness
12. Sustainability

# Initial topline findings

## Part I

### Employee Recruiting & Retention

The workforce is driven by salary and title. For those looking for a new job, as well as those who have already moved. In both circumstances, money is the key driver. Those not looking for a job are content on their place of work because of their good salary. In leadership, people are looking for truthful communication and reliability.

### Workplace Flexibility

Almost half the workforce work over 40 hours per week. US & Canadian decision makers are particularly likely to work more than 40 hours. (US – 59%, Canada – 54%). The reason for that is that there is simply not enough room in the working day to complete all tasks. 69% of people believe in creating a good balance between work and personal life. Flexibility is also leadership style that has most increased over recent years.

### Happiness at Work

Happiness is important to workers (92% of workers rate it as important or very important), and fortunately most people are happy – only 4% say that they are very unhappy in the workplace. Salary is seen as the answer to the improved happiness. Decision makers report to be happier than general staff.

### The Freelance Economy

People generally freelance so that they can control their own hours & improve the work / life balance. However, only 29% of people are sure that they would not consider a traditional role. They would consider this overwhelmingly for a consistent income. Far less people would consider leaving their traditional job for a freelance position.

### Telecommuting

Telecommuting is important to people for a number of reasons. (Time saving, weather, money saving, work/life balance). If telecommuting was stopped then 69% of people would be disappointed to some extent.

# Initial topline findings

## Part 2

### Workplace Productivity

The office is still the most productive and inspiring place to work, the home comes in a close second place to the desk in terms of places for inspiration. 46% of people think that they receive too many emails, but only 34% of those think that it is impacting their productivity.

### Workplace Innovation & Technology

Companies are providing their employees with innovative tech, but they're typically don't encourage use of wearable devices during work. With 21% of the workforce saying that they are provided with the latest technology. Companies are spending most of their money on technology and office products, and what they look for is price and an easy ordering service.

### Office Design – Personalisation

Office layout is now roughly split in thirds between open, closed and hybrid. This is also reflected in office layout. In terms of improving office design, natural light is the biggest feature of interest. People believe that the natural light will help improve productivity and creativity. Currently, the three most common office descriptors are 'standard', 'plain' & 'dull'. Co-workers are the greatest source of inspiration, as is feedback on knowing they're having an impact, but only 16% describe their office as inspiring.

### Wellness

Wellness programs are widely available (Over 36% of companies offer a wellness program of some sort). The most popular features of a wellness program are wellness coaches & smoking cessation. The features that are desired are fresh food and a gym onsite. Just over a third of employers financially incentivise wellness programmes, but that isn't the key driver for participation for staff, health improvements are. Three quarters feel that the workplace has impacted on their stress levels to some extent, largely due to the volume of work.

### Sustainability

43% of people say that their company does not make an effort to be eco-friendly. Those companies that do make an effort, essentially do it to be good & kind to the environment rather than tax breaks or reputation. Recycling is still the most common way to be eco.

# Comparison with 2015 survey

## Key take outs

- Salary appears to be a stronger factor for not considering to change jobs in 2016.
- When it comes to doing best at work, the salary along with work culture appear to be less important in 2016 results, where such new factors as sense of purpose and passion play leading roles.
- It is visible that in overall the workload has become heavier - there are more people that have to work after the standard workday is done in order to complete work that they don't have time to do during the work day.
- On the other hand, there is a growing percentage of companies that suggest flex-timing; however, this is happening on the background of fewer organizations suggesting a convenient combination of flex-timing and telecommuting.
- The above can be causing a slight decrease in the numbers of those who claim feeling very happy at work, whereas offering office perks isn't influential anymore for improving workplace happiness.
- Although such reasons as work/life balance and transportations savings remain as important factoring for wanting to telecommute, another reason that grew strong in 2016 survey for both Canada and US is weather.
- Creativity factors also differ when compared with 2015 survey results - previously important factor of culture lost its topicality, whereas co-workers appear as the most powerful contributor to workplace creativity.
- The provision of wellness programs by organizations has also decreased in both US and Canada, whereas similar proportion of respondents believe that the availability of wellness program is a selling point for new job.

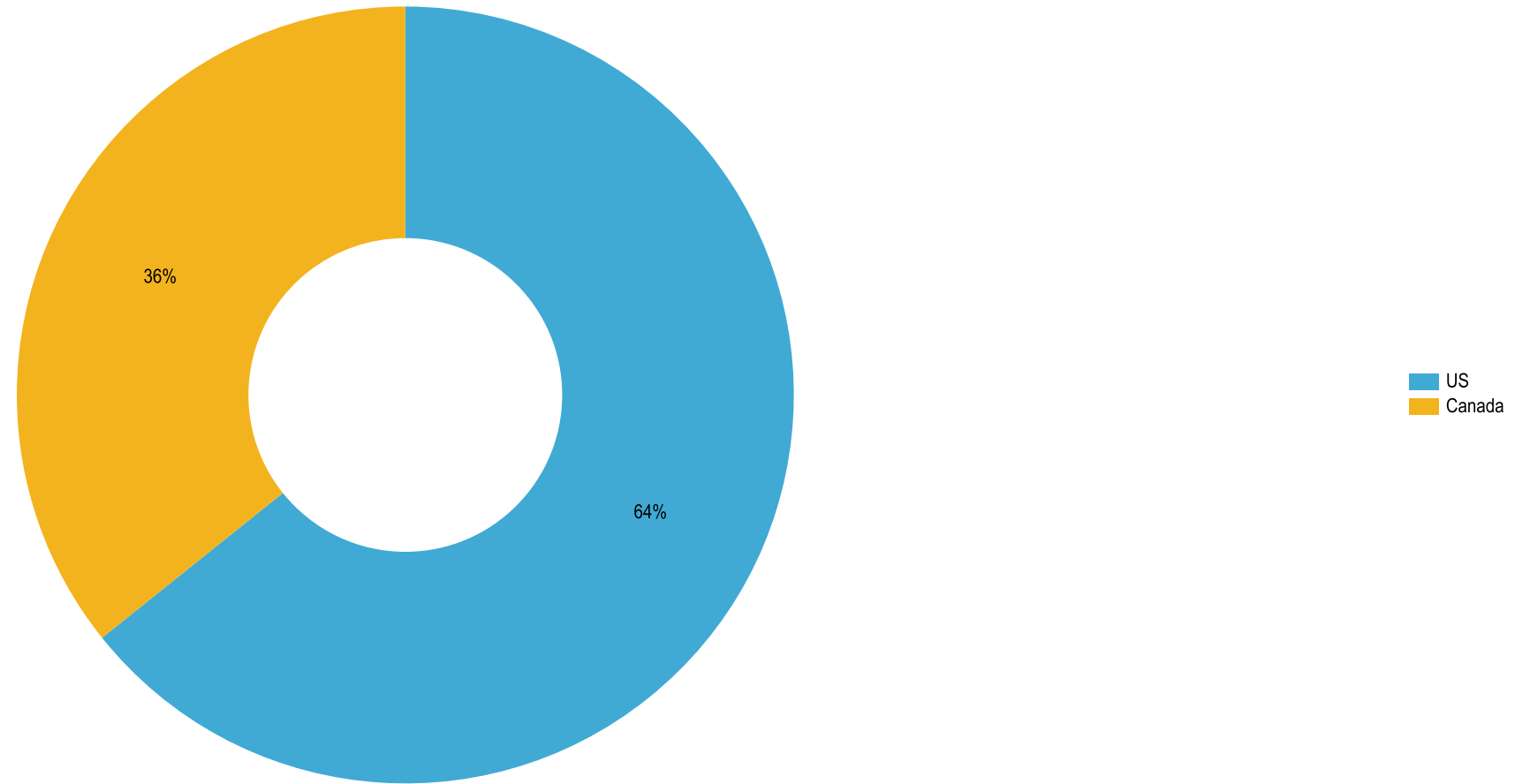
# Profiling

We got responses from:

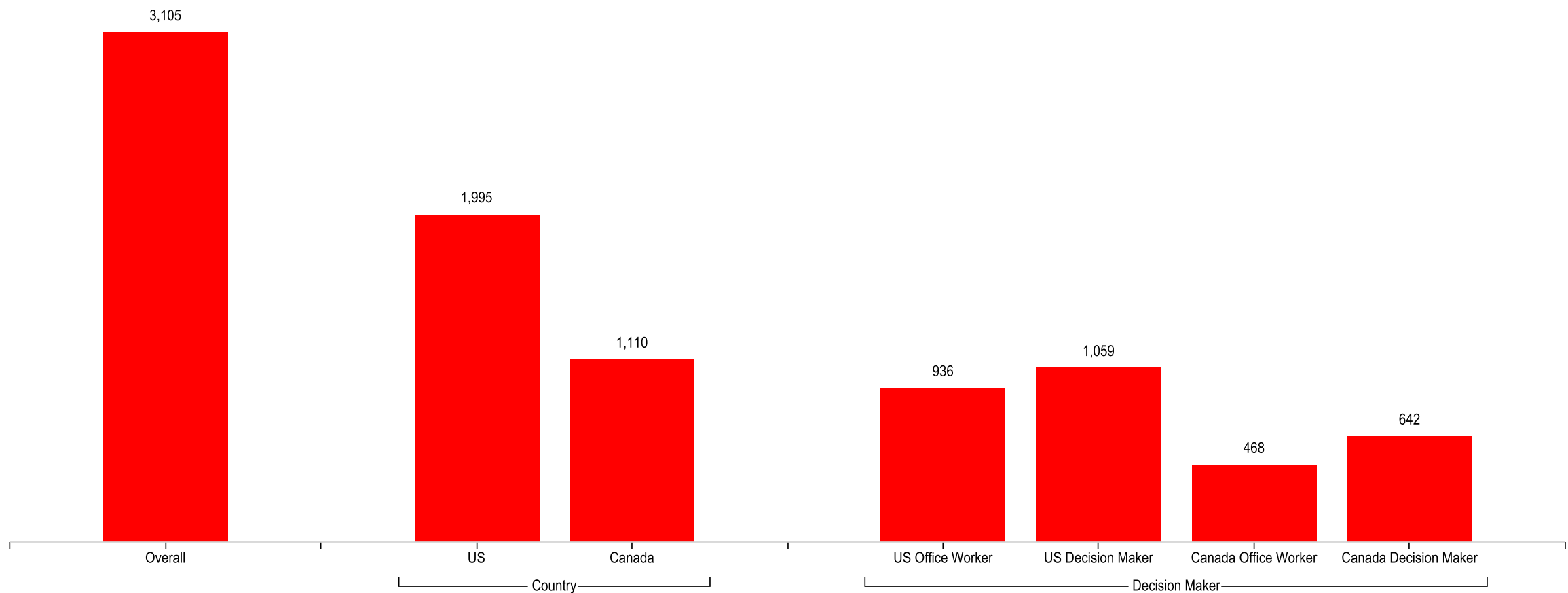
- 1,059 US business decisions makers [559 over target]
- 936 US general office workers
- 642 Canadian business decision makers [342 over target]
- 468 Canadian general office workers

# Country of respondents

Where do you live?



# Sample details



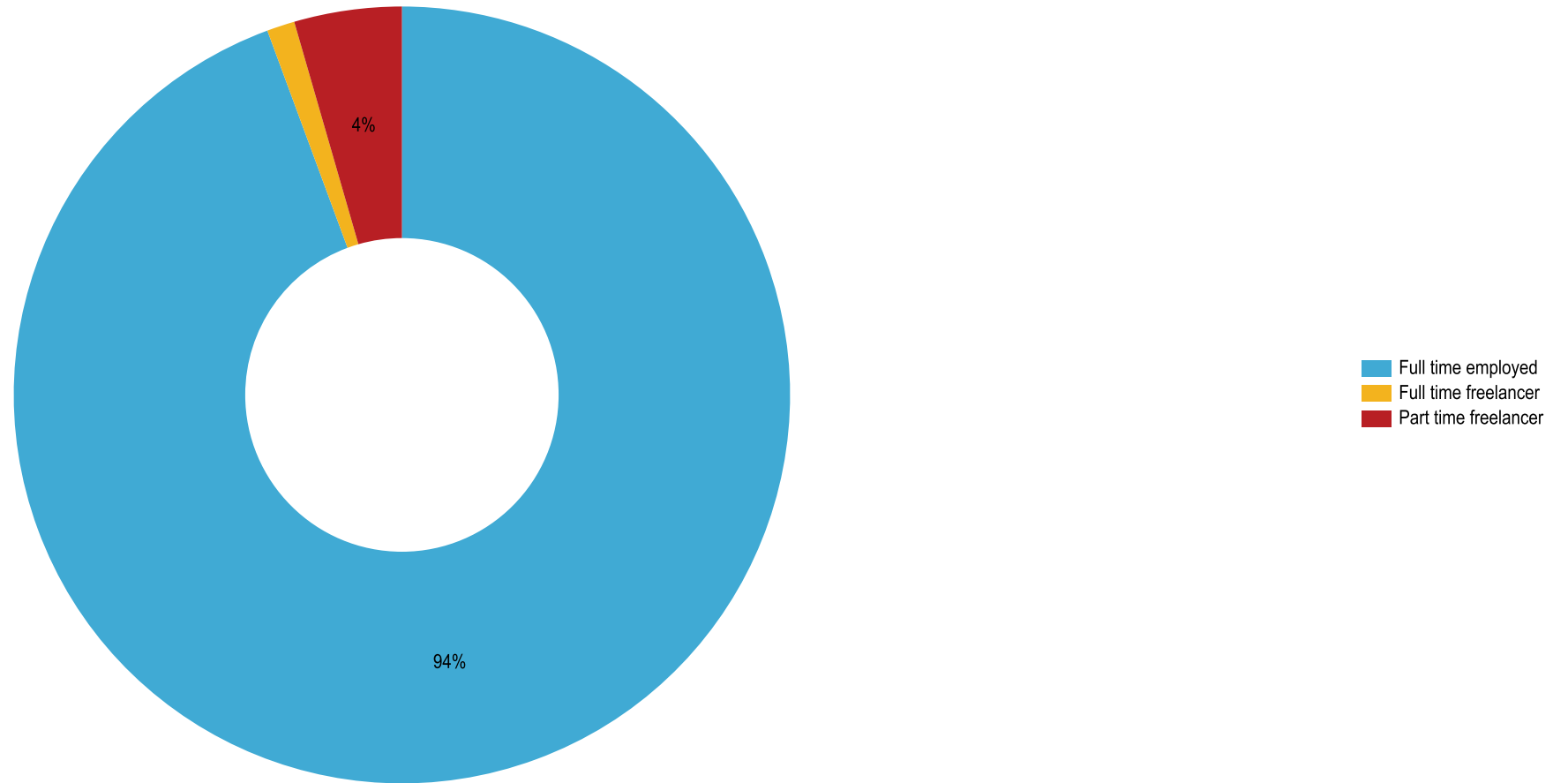
(N=3,105)



# *Employee Recruiting / Retention*

# Employment status

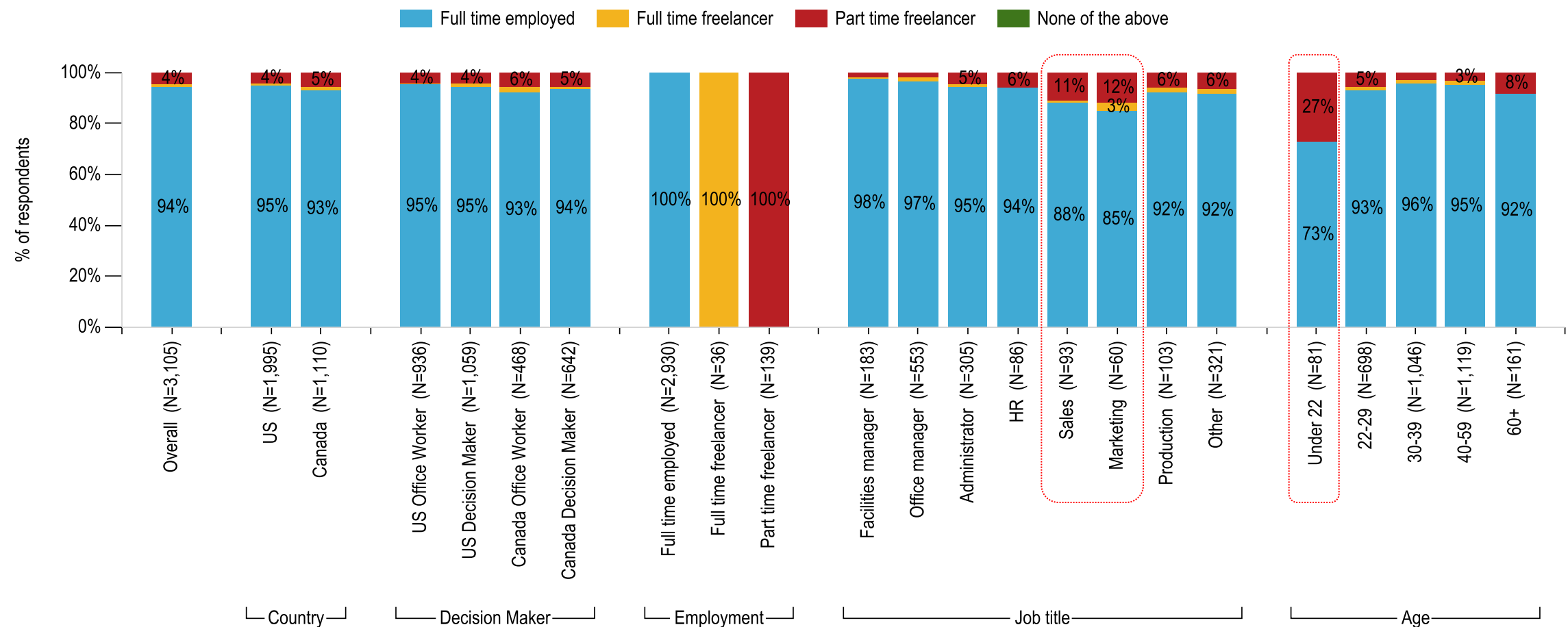
Are you employed?



# Profile: Employment status

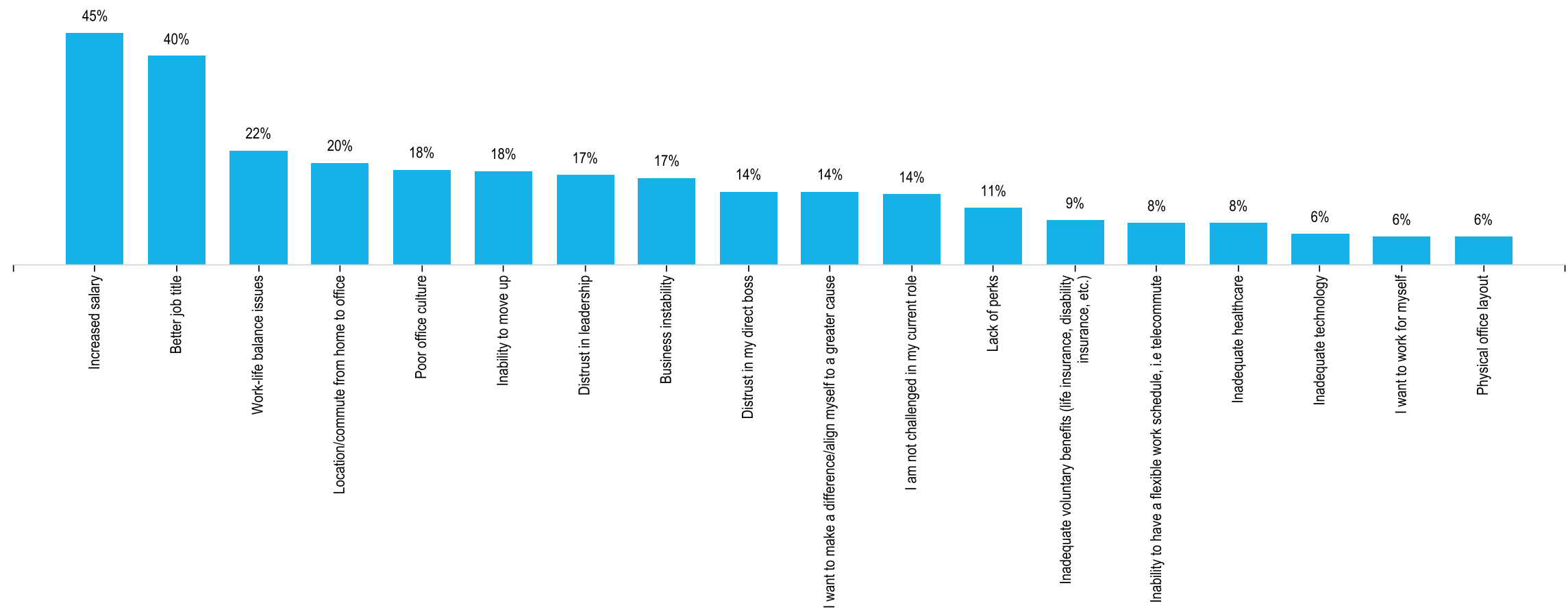
There are more freelancers that work in Sales and Marketing, along with people aged under 22.

Are you employed?



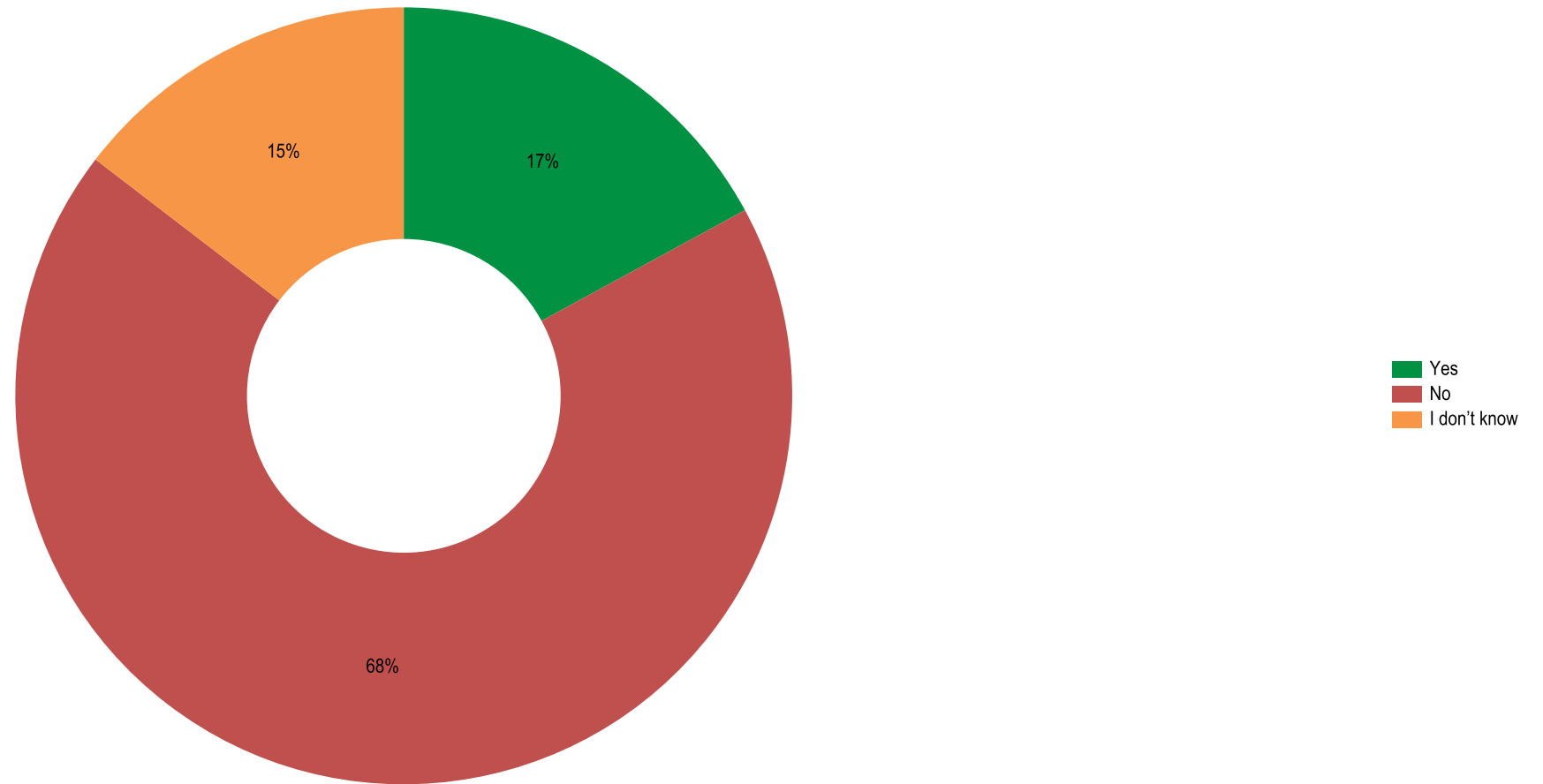
# Reasons for changing jobs

What was your biggest reason for the job change? Please select the top 3 reasons



# Expecting to change jobs

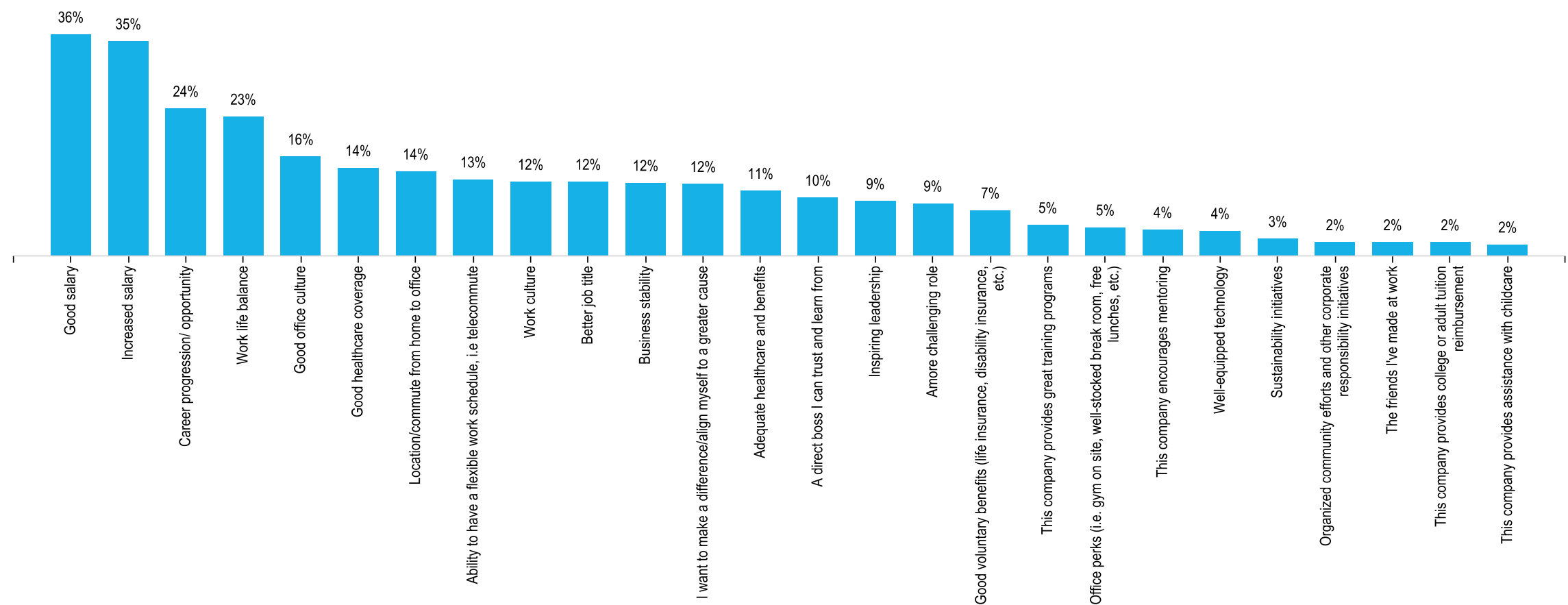
Do you expect to change jobs in the next 12 months?





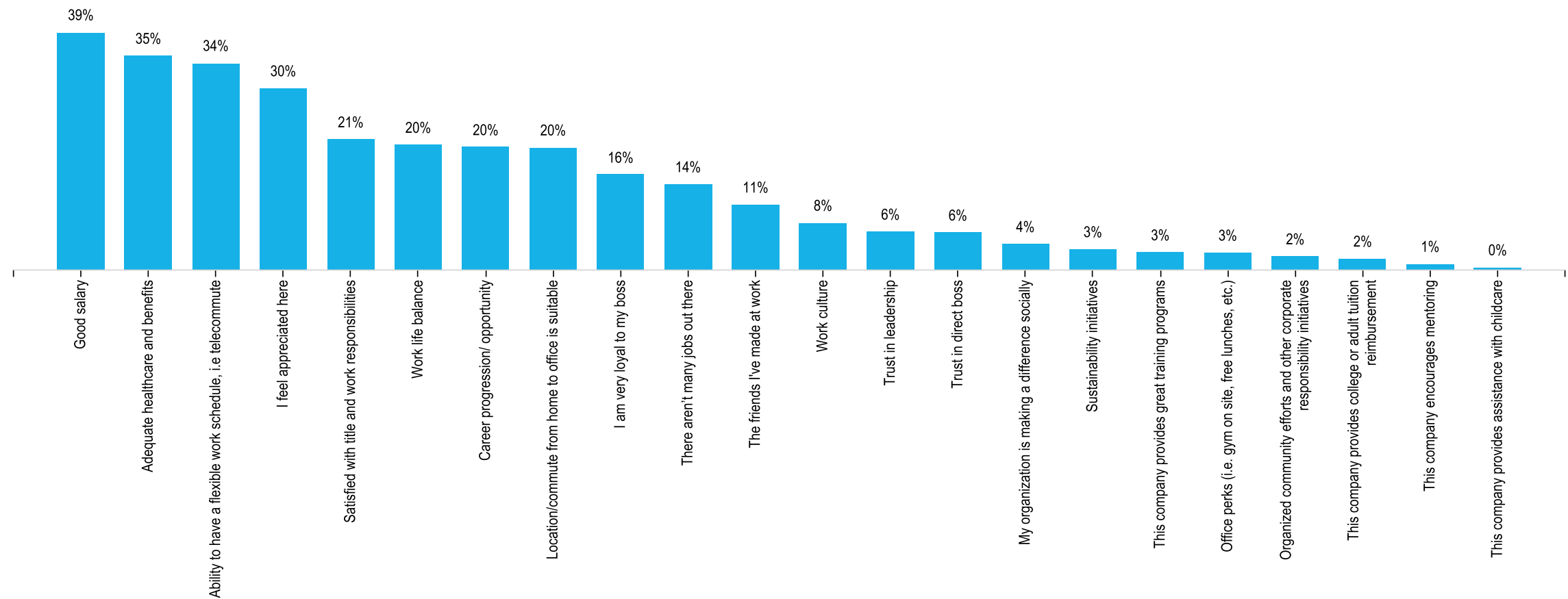
# Looking for a new job

What are you looking for in your new employer?



# Not looking for a new job

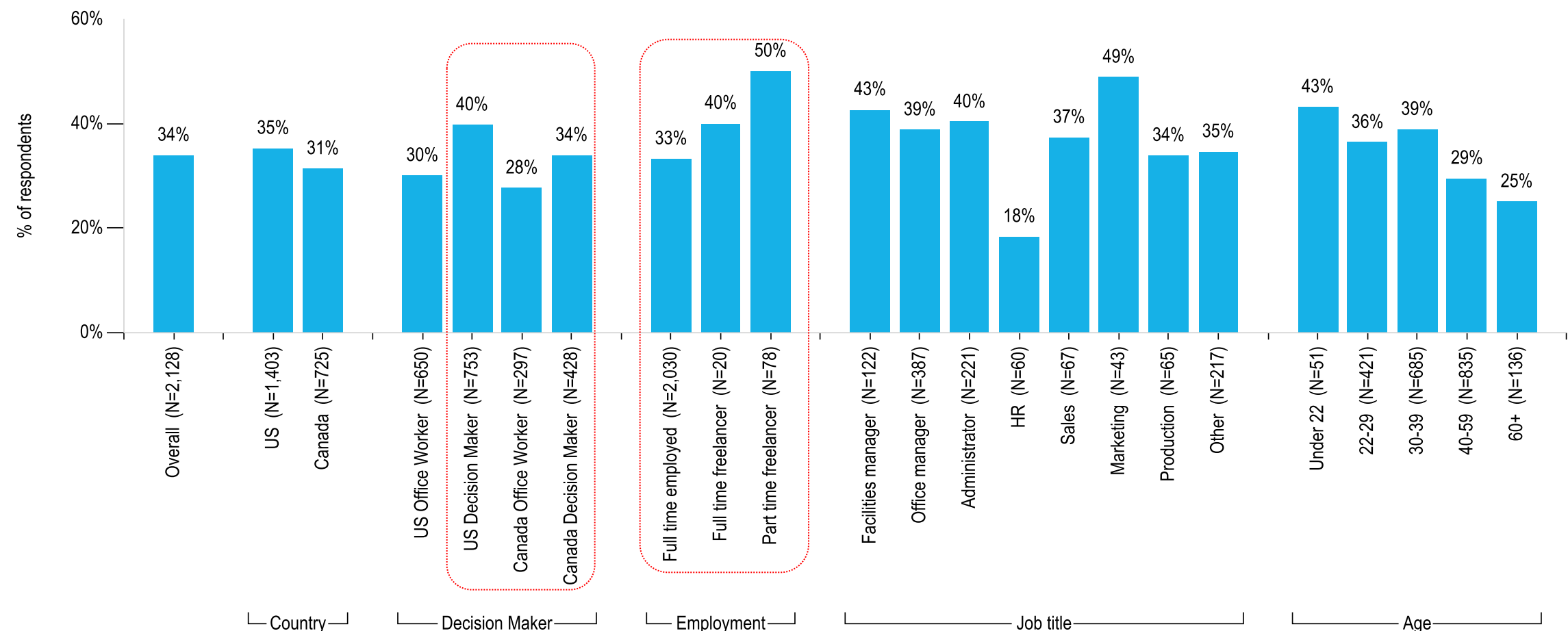
If you are not expecting to change jobs, what is the leading contributor to your loyalty?



# Profile: Ability to have a flexible work schedule, i.e telecommute

There are more decision makers in US that appreciate flexible schedule than in Canada (40% vs. 34%). This also applies to part time freelancers when compared to full time employees (50% vs. 33%, respectively).

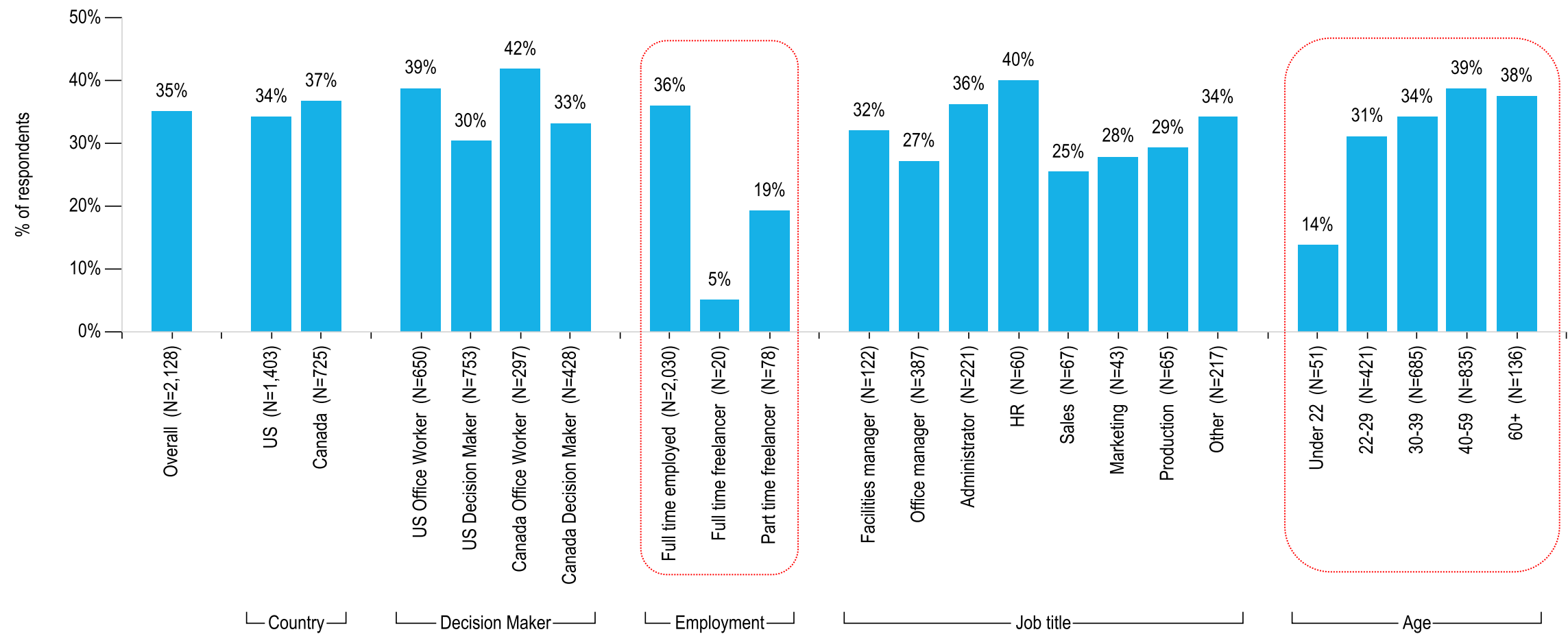
If you are not expecting to change jobs, what is the leading contributor to your loyalty?



# Profile: Adequate healthcare and benefits

Adequate healthcare and benefits are greatly appreciated by full time employees and serve as a reason for not expecting to change jobs; similar applies to the groups aged over 22.

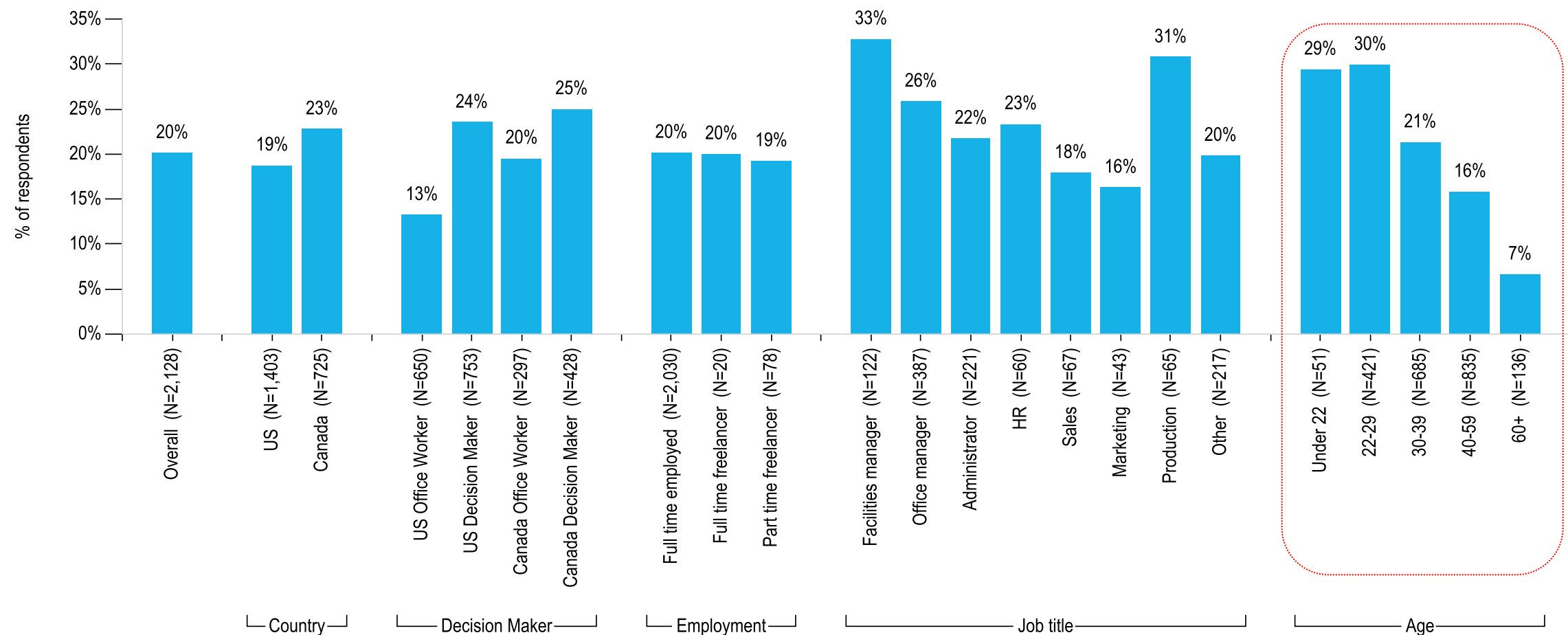
If you are not expecting to change jobs, what is the leading contributor to your loyalty?



# Profile: Career progression/ opportunity

Career progression is a stronger reason to stay at current workplace for those under 30 years old.

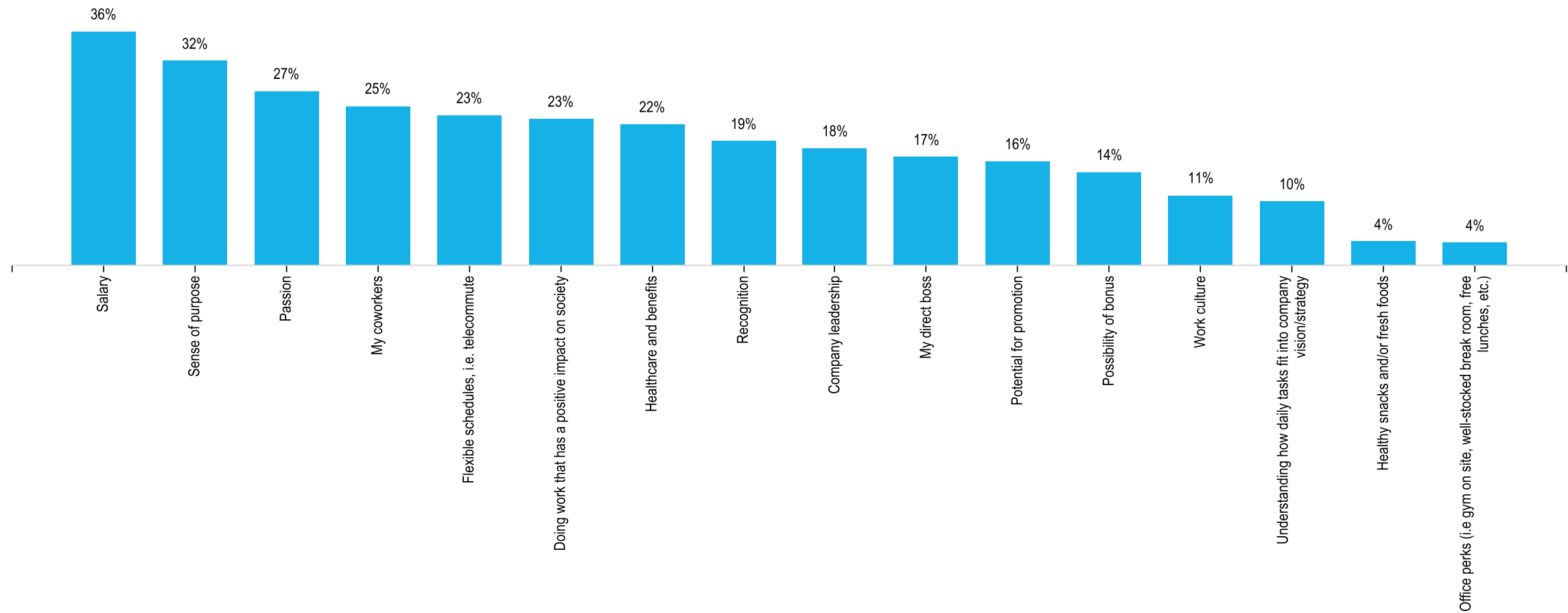
If you are not expecting to change jobs, what is the leading contributor to your loyalty?





# Motivation

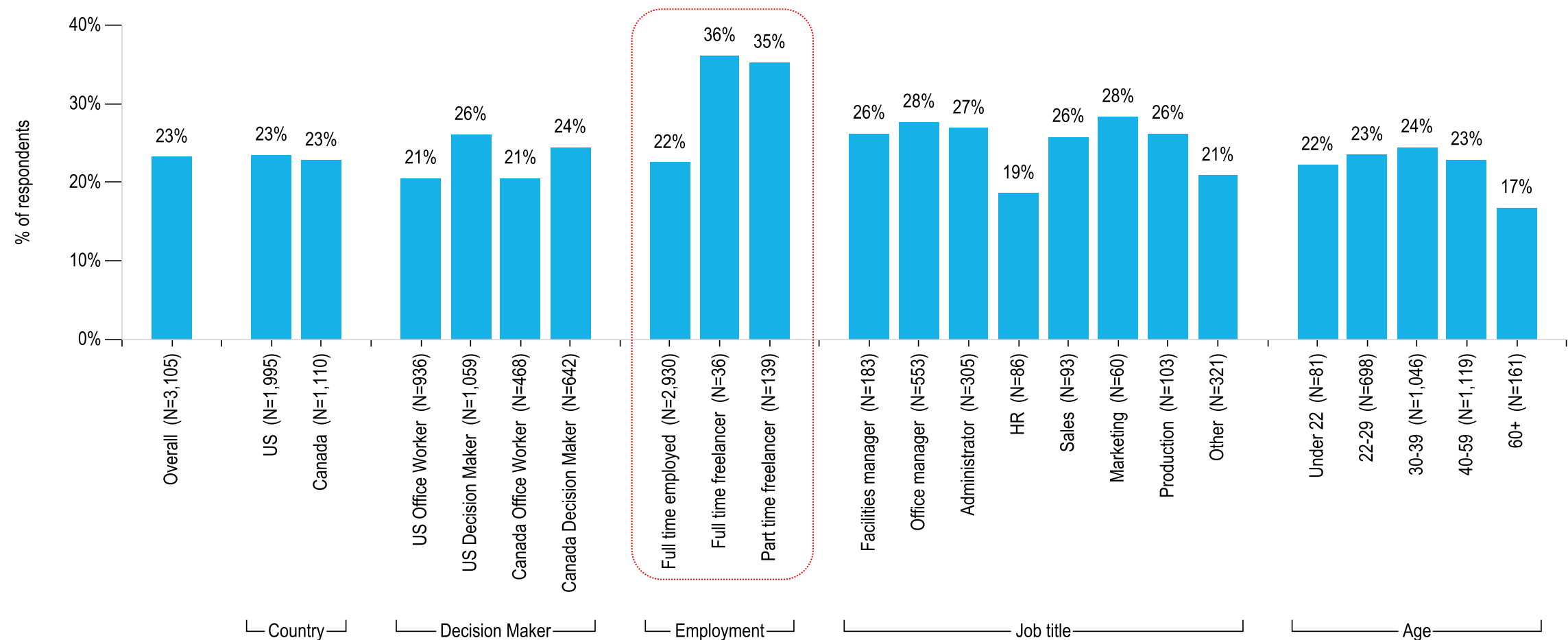
What motivates you to do your best at work?



# Profile: Flexible schedules, i.e. telecommute

Flexible schedules and opportunity to telecommute is a better motivation for part time freelances rather than full time employees (35% vs. 22%, respectively).

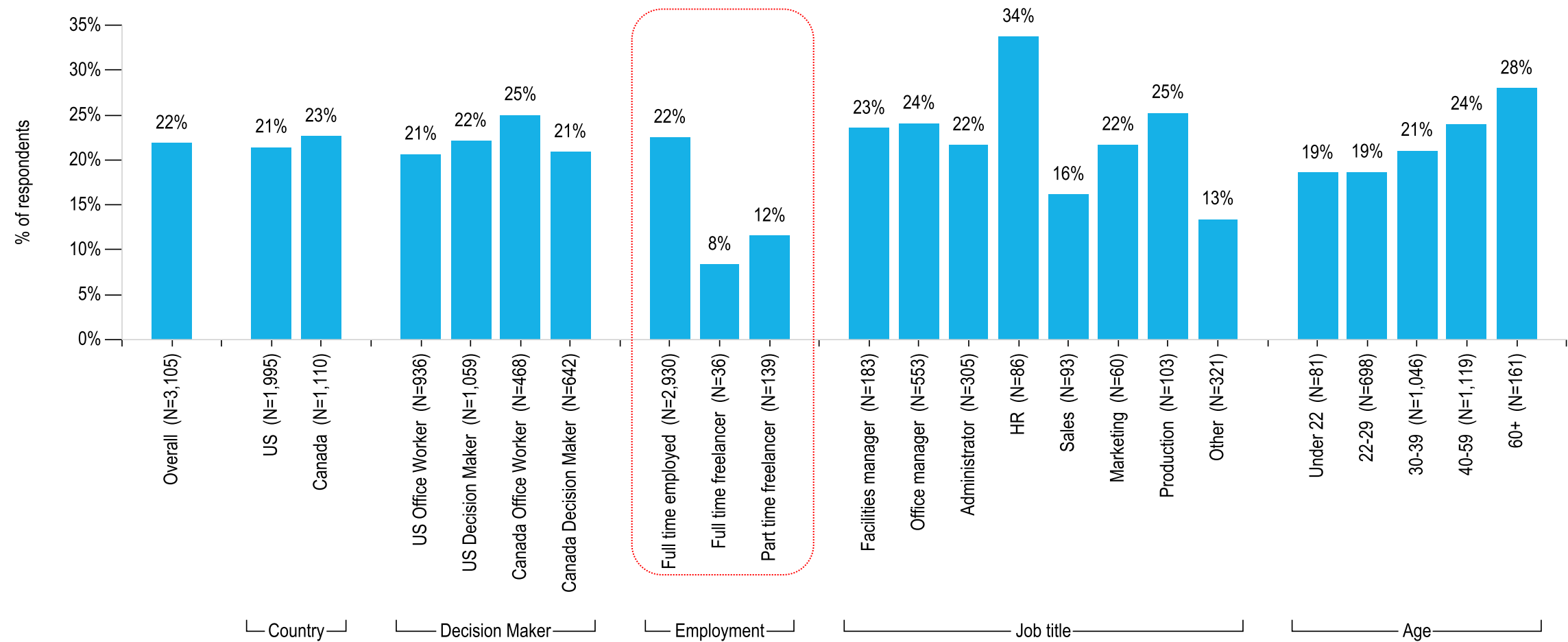
What motivates you to do your best at work?



# Profile: Healthcare and benefits

Again, healthcare appears as an important factor for full time employees as it also motivates them to do their best at work.

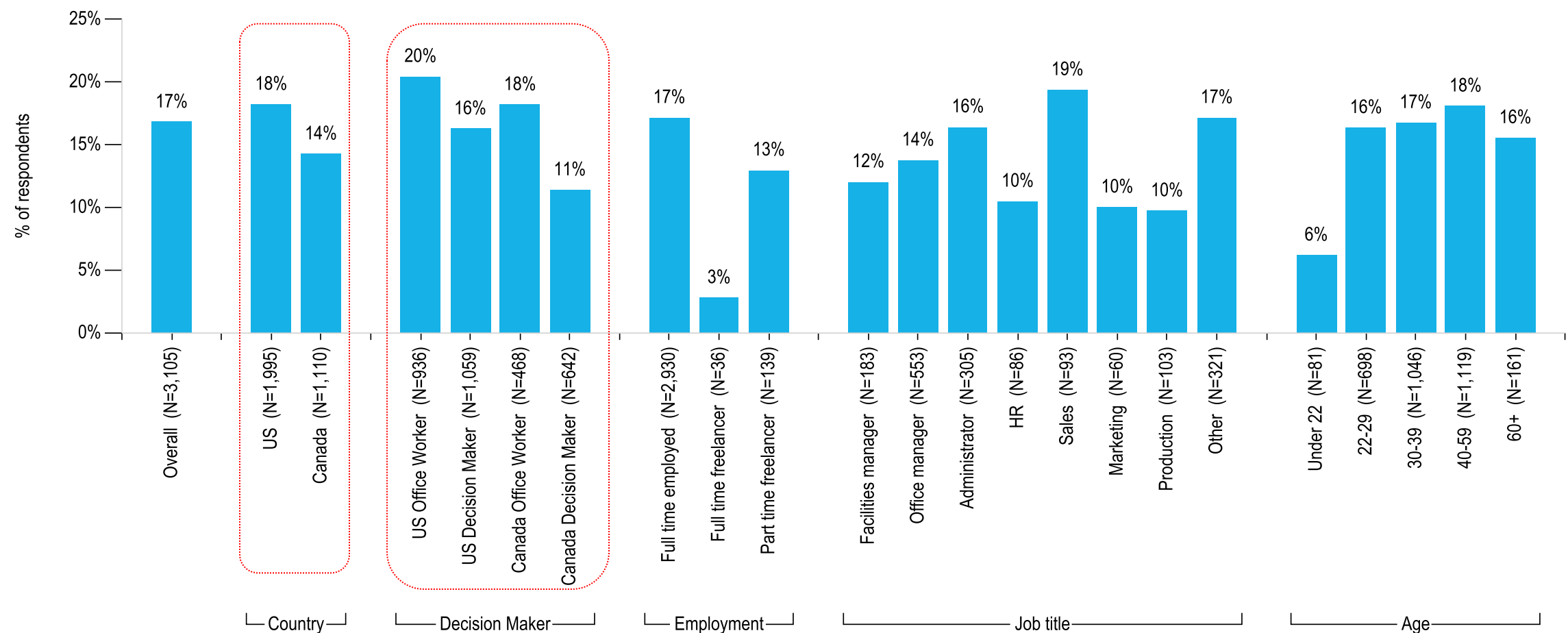
What motivates you to do your best at work?



# Profile: My direct boss

Direct boss is a stronger motivating factor for decision makers in US vs Canada (16% vs. 11%). This is also a pattern on overall country level (US 18% vs. Canada 14%).

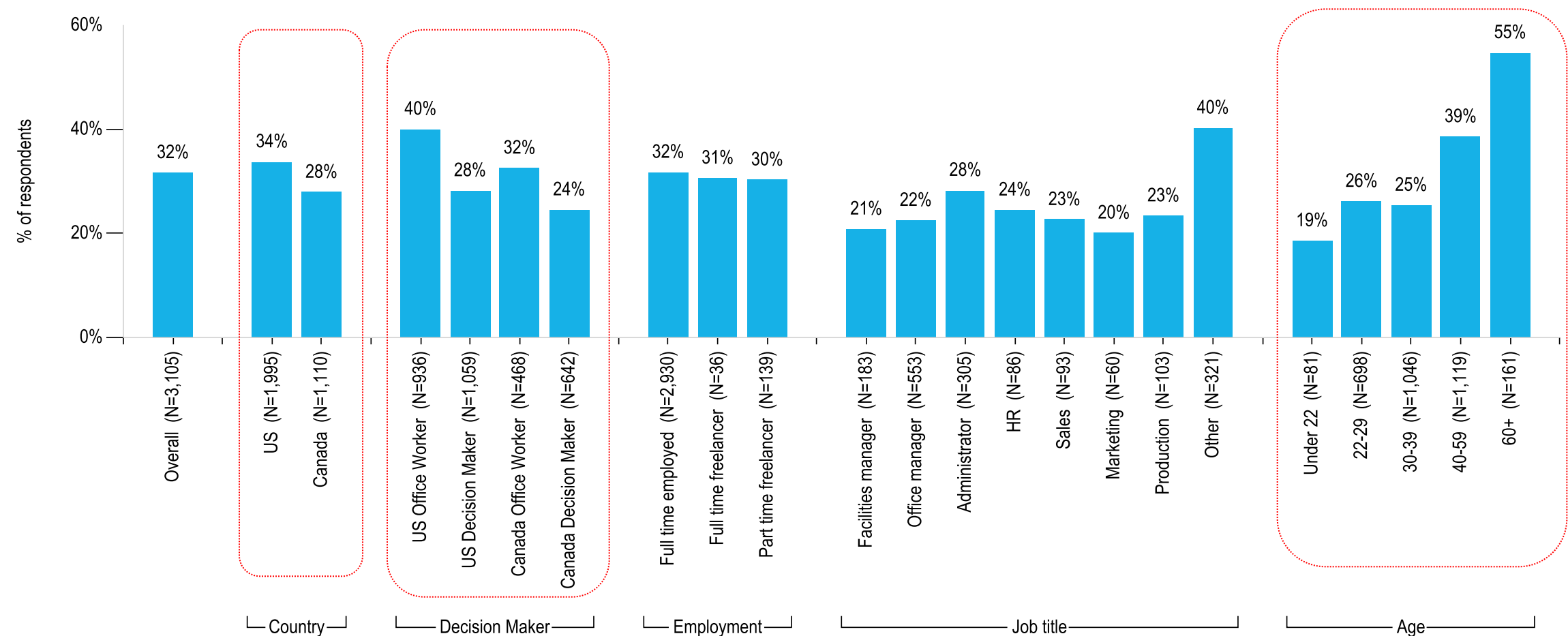
What motivates you to do your best at work?



# Profile: Sense of purpose

Sense of purpose is a stronger motivating factor for office workers in US vs Canada (40% vs. 32%) and respondents aged over 60. This is also a pattern on overall country level (US 34% vs. Canada 28%).

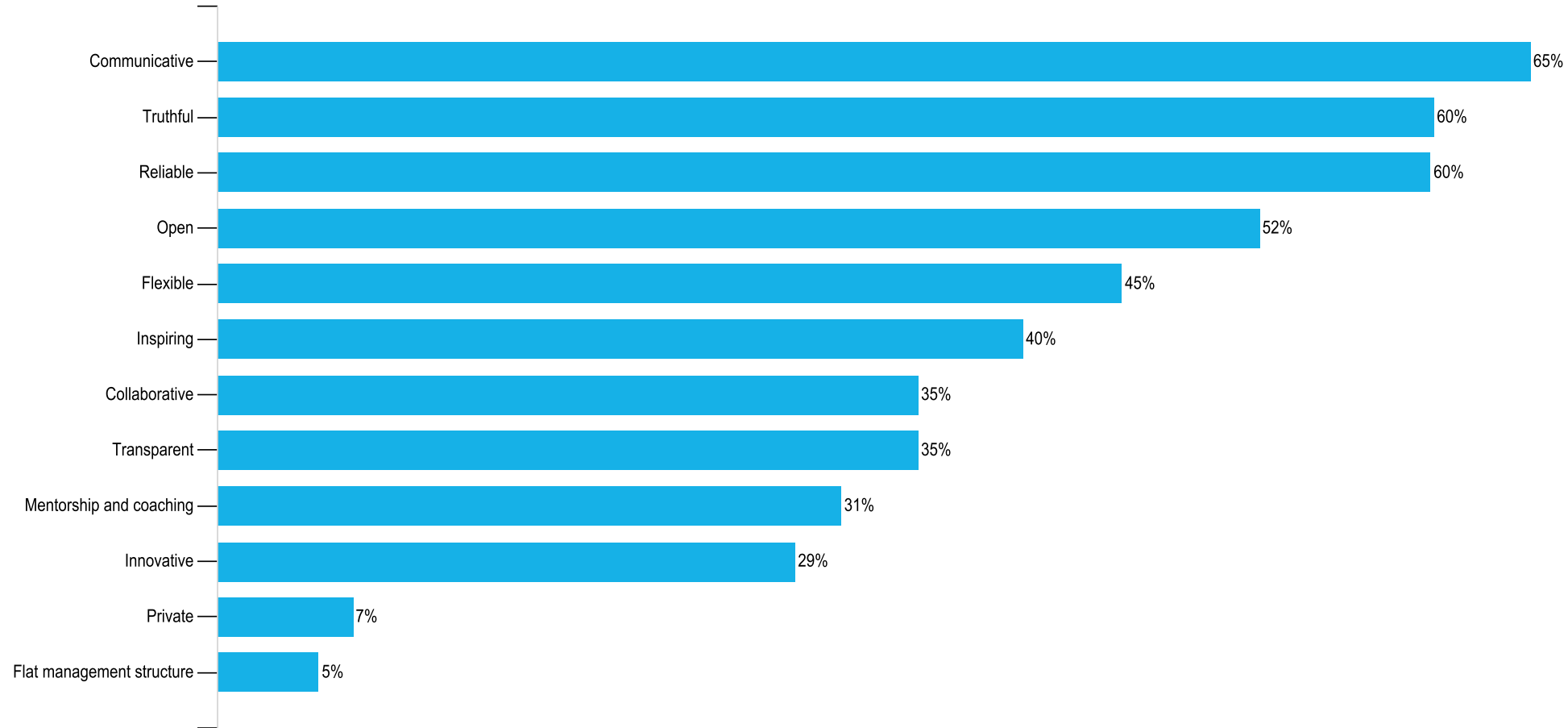
What motivates you to do your best at work?





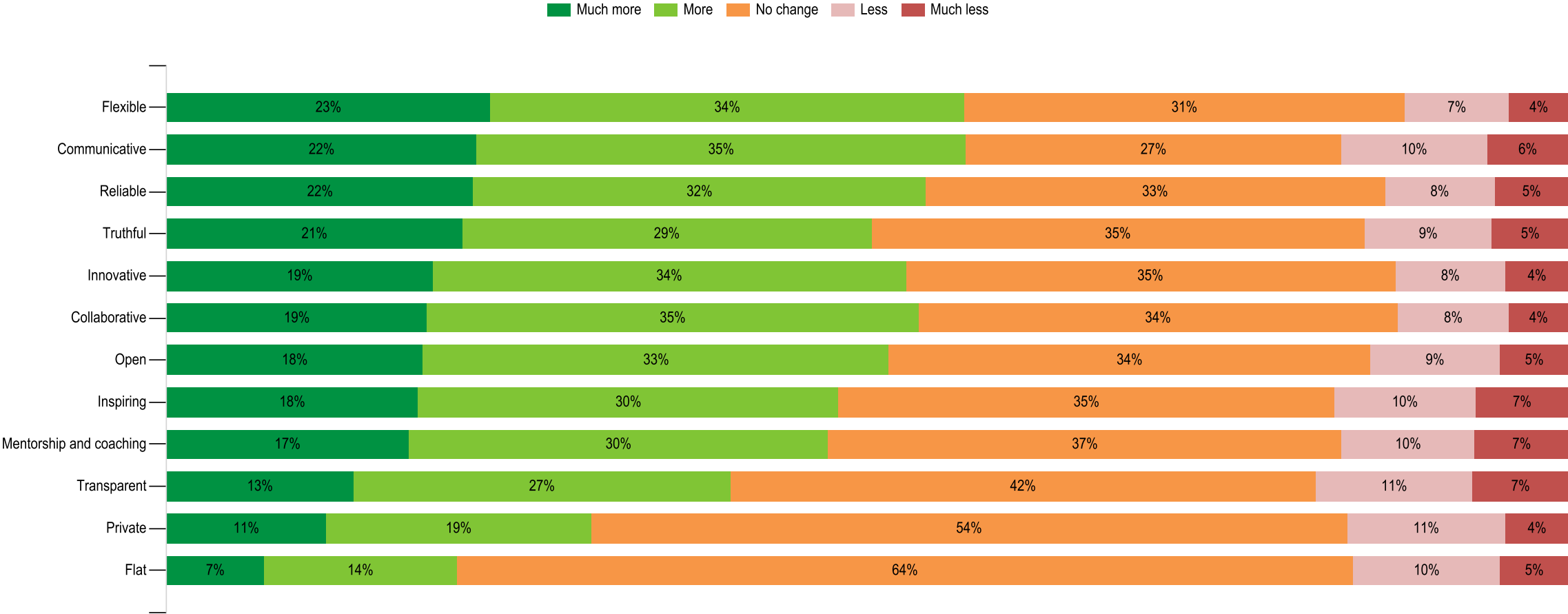
# Company leadership

What characteristics describe the ideal company leadership?



# Leadership change

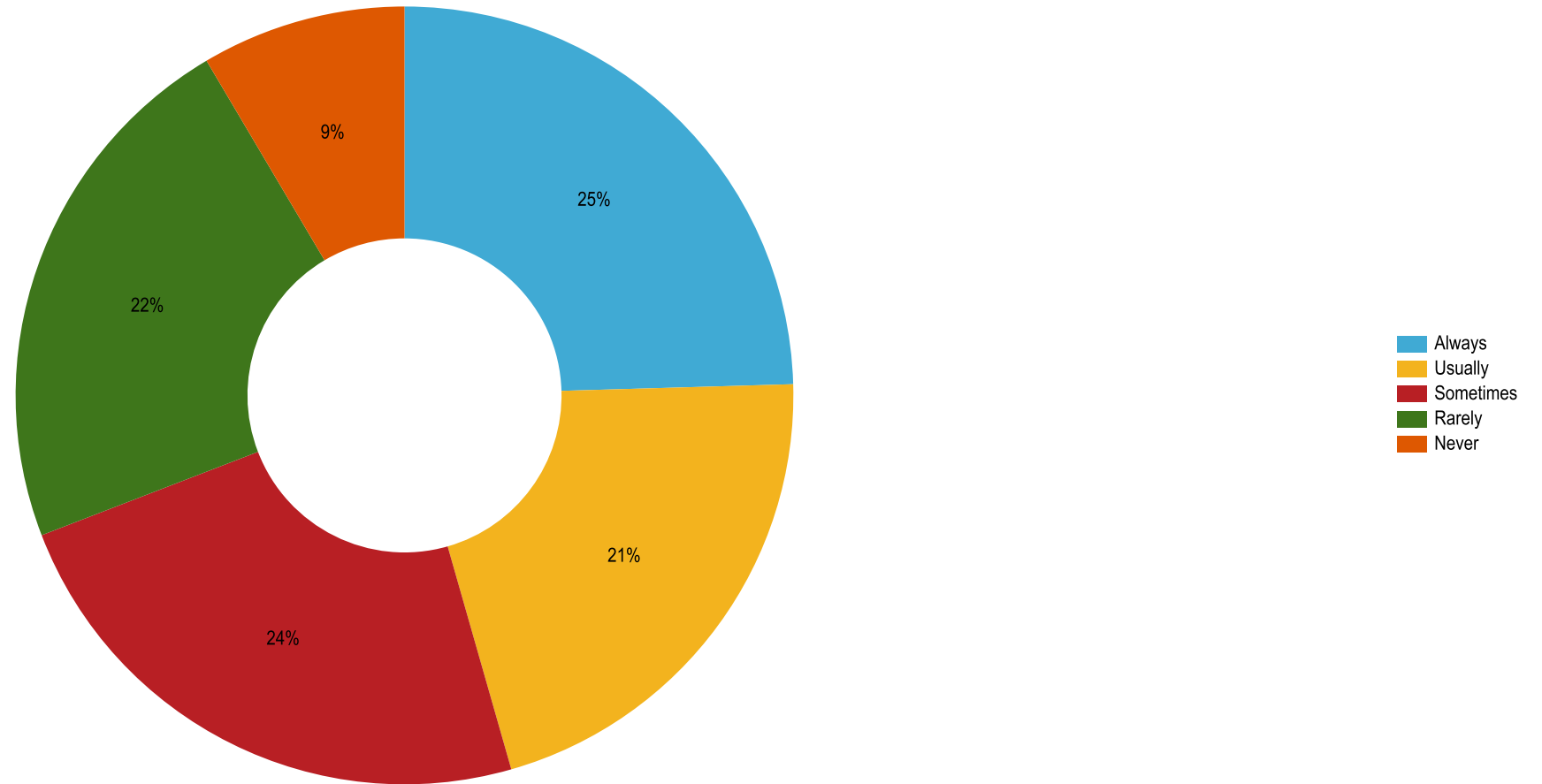
How has your company leadership changed in the past five years?



# *Workplace flexibility*

# Working more than 40 hours

How often do you work more than 40 hours per week?



# Profile: Working more than 40 hours

There are more decision makers in US who always work more than 40 hours per week when compared to Canada (35% vs. 26%, respectively).

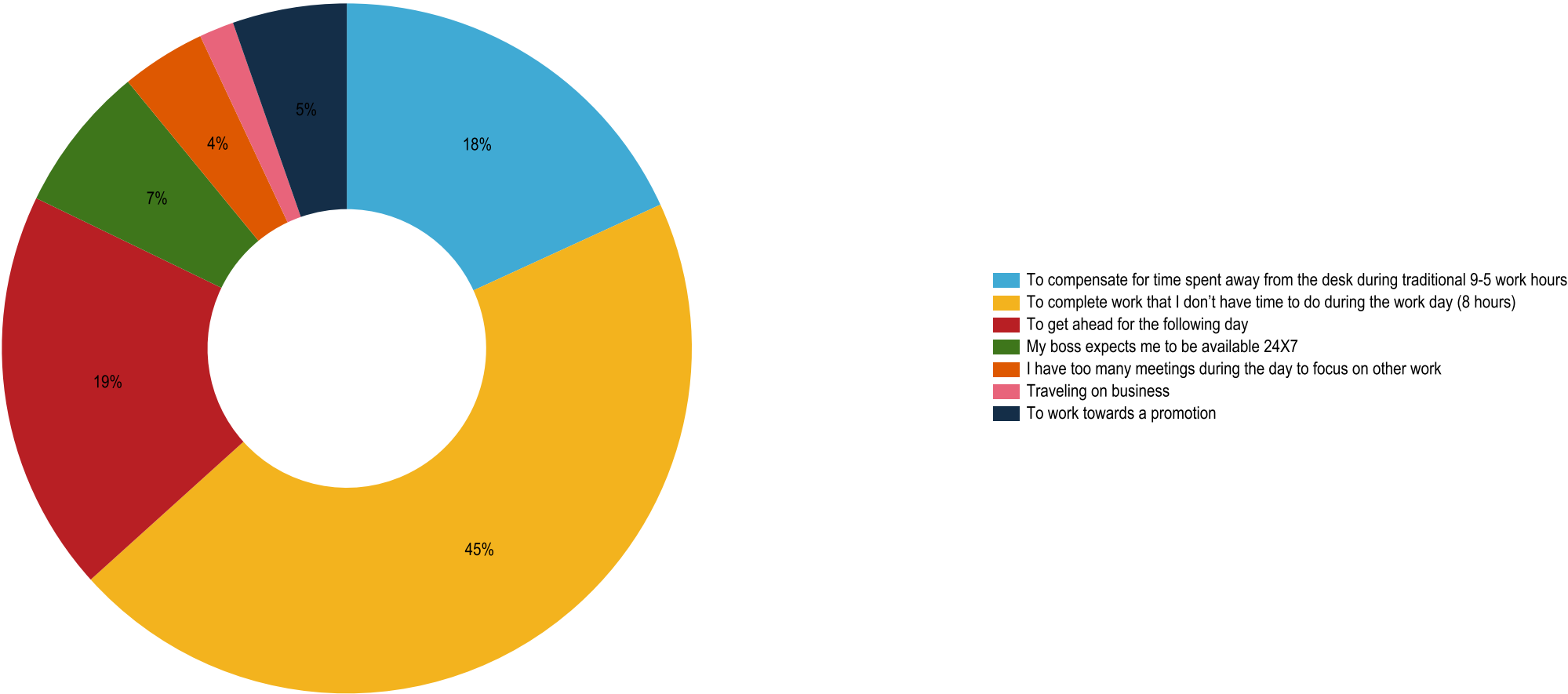
How often do you work more than 40 hours per week?





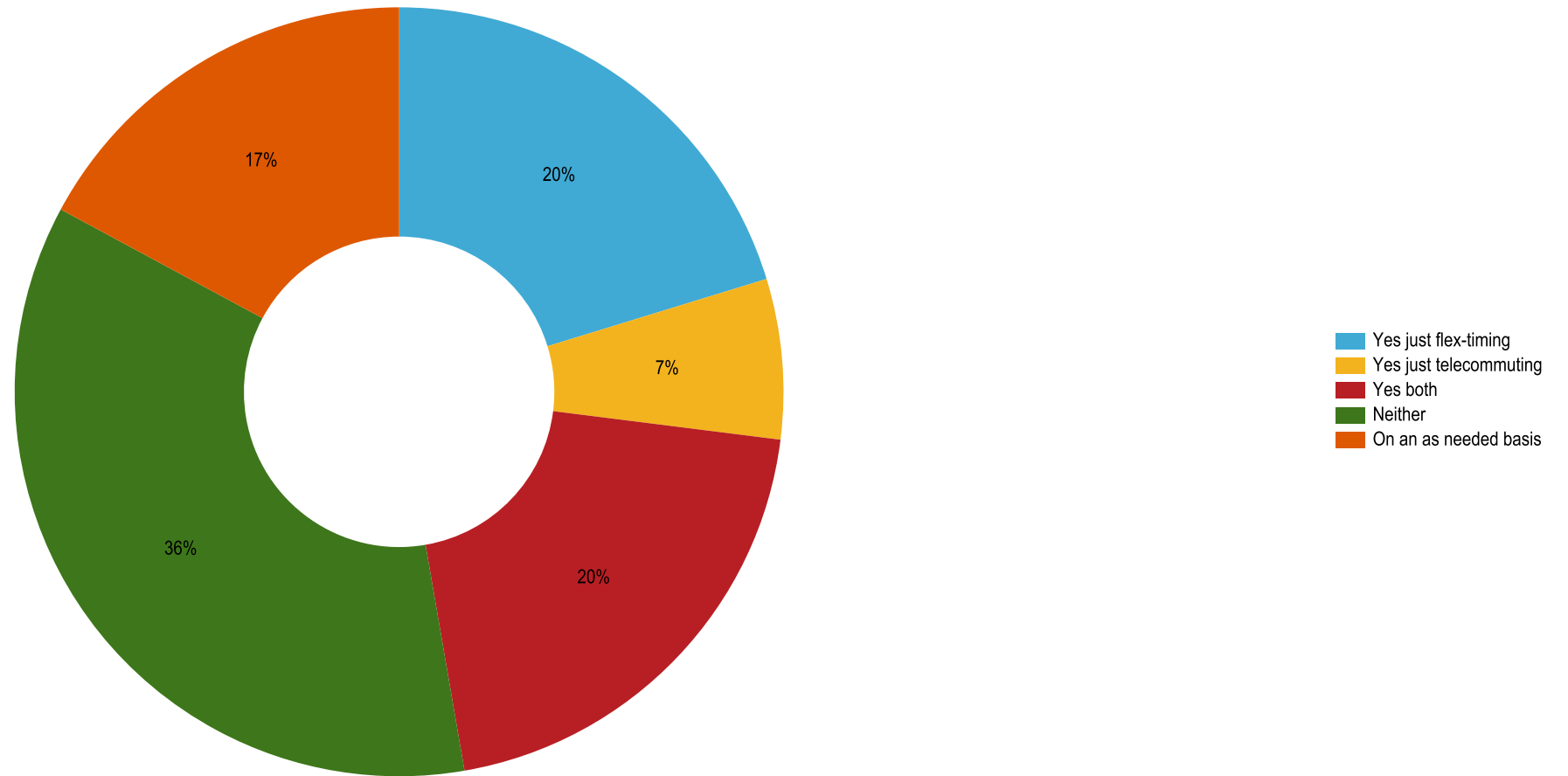
# Reasons for working more than 40 hours

What is the biggest reason you work after the standard workday is done?



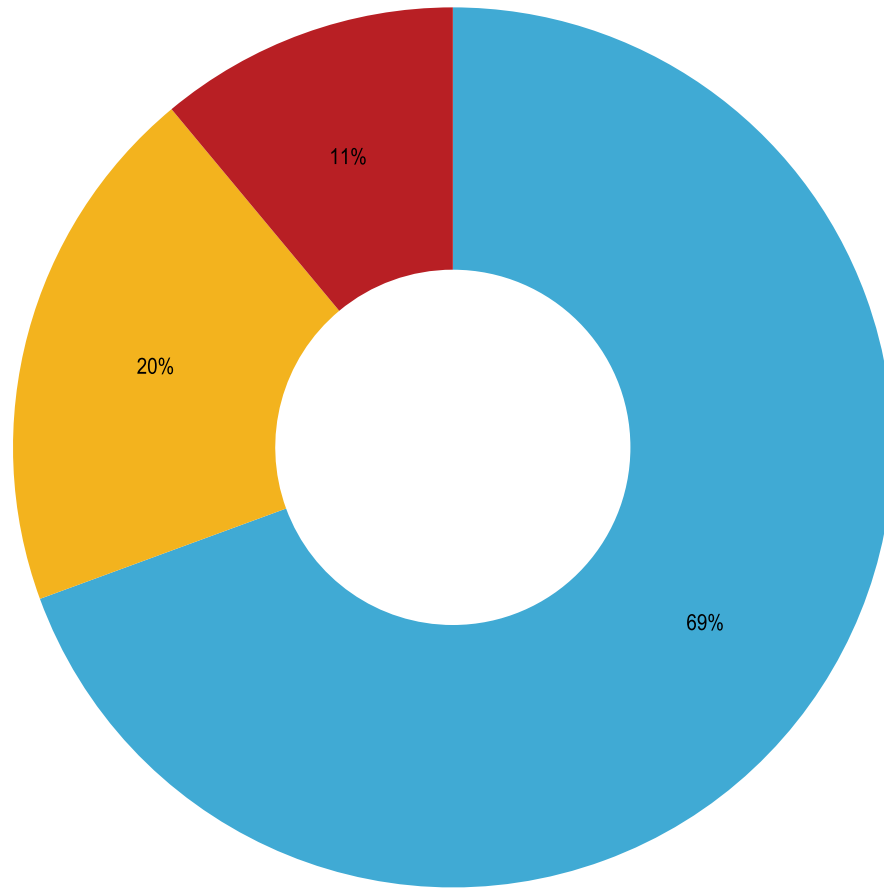
# Flex-timing & commuting

Does your company offer flex-timing or telecommuting?



# Your approach to flexibility

How would you describe your approach to workplace flexibility?

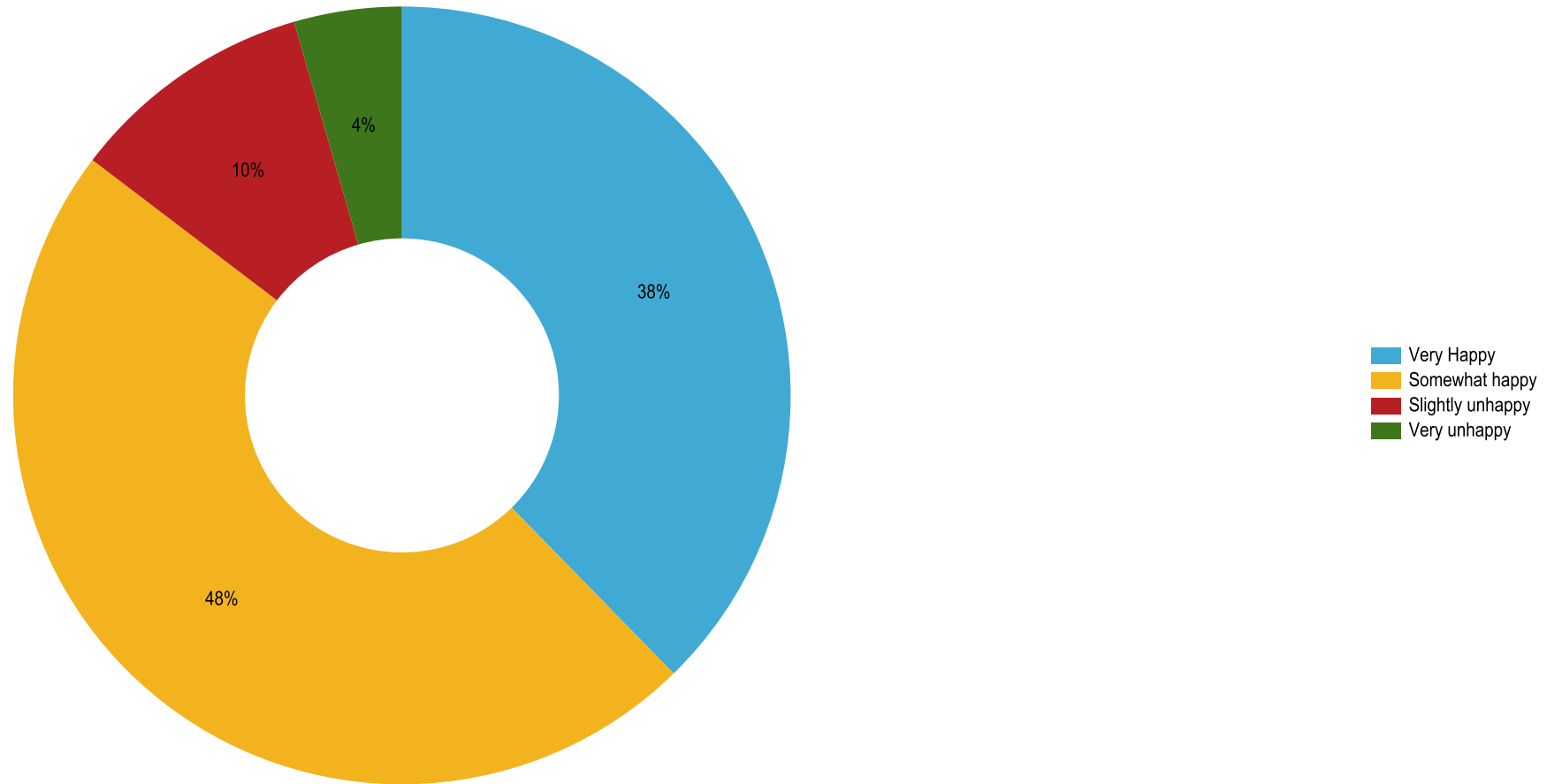


- Work life balance - where work and personal life obligations are able to be met, but keeping work and...
- Work life integration - where work and life are intertwined, leveraging technology to make it happen (i....
- Workplace flexibility is not a major consideration for me

*Happiness at work*

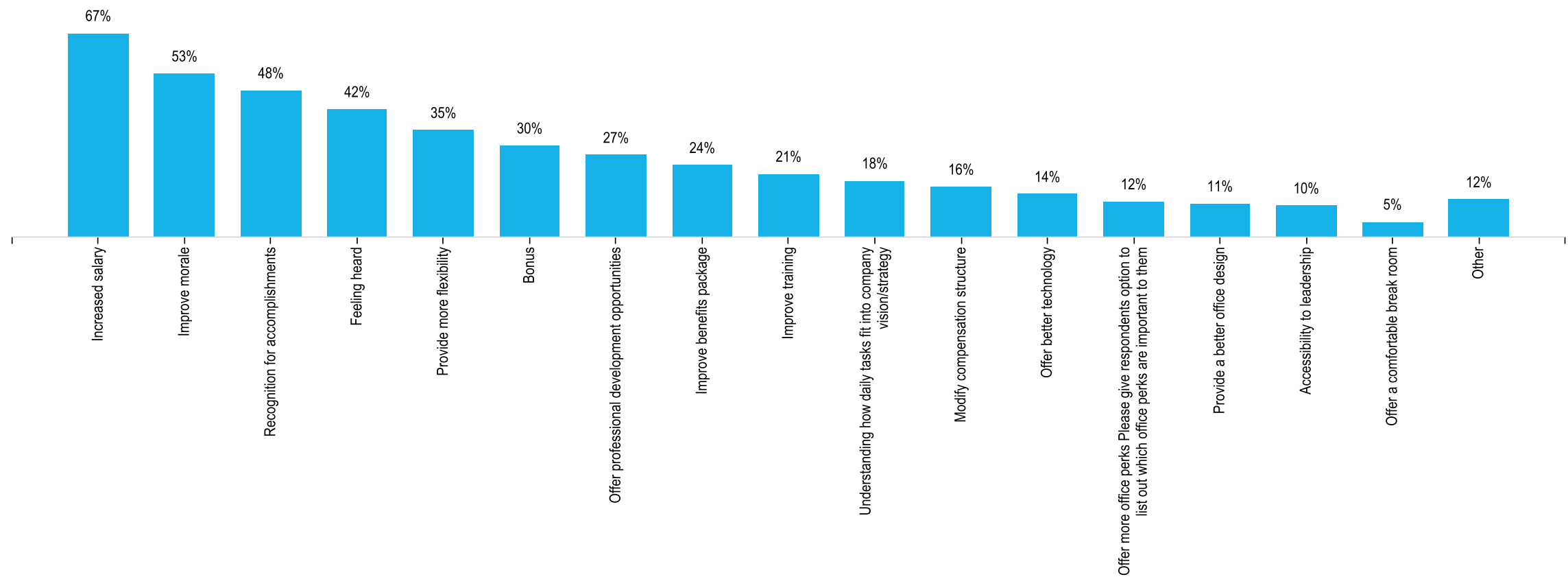
# Happiness at work

Are you happy at work?



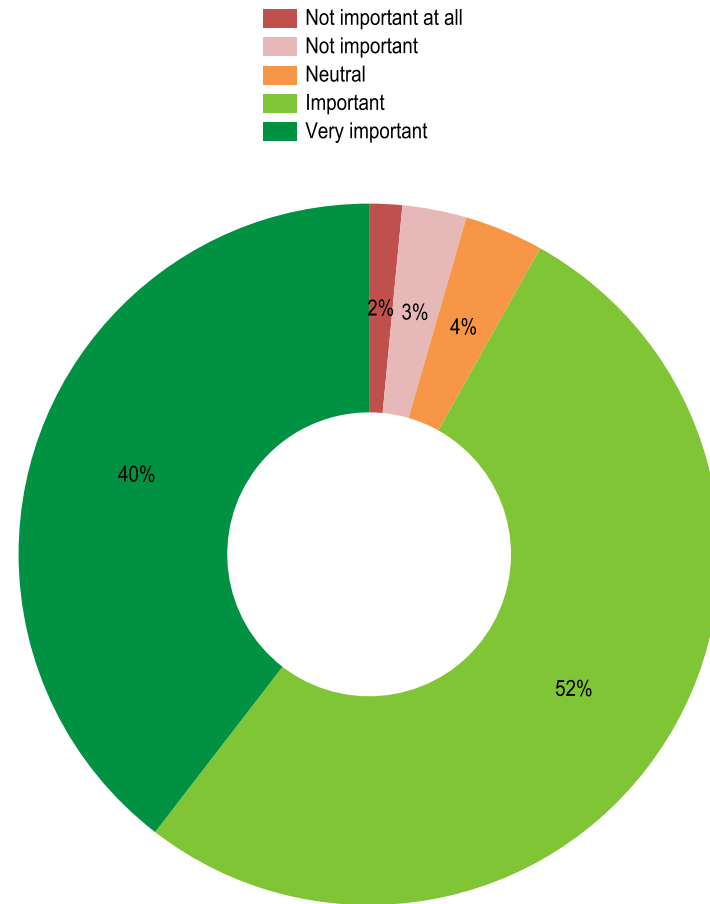
# Improving happiness

What can your employer do to improve your happiness?



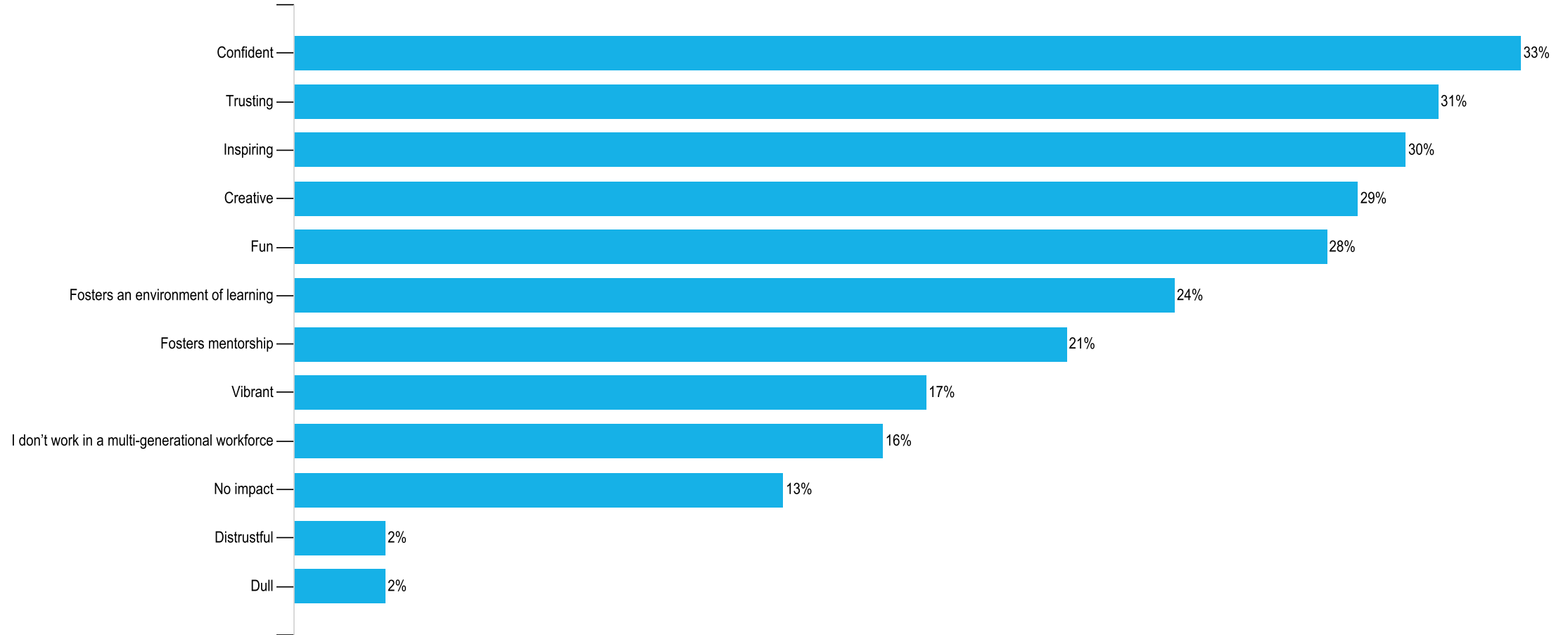
# The importance of happiness

On a scale from 0 to 10, please rate how important is your happiness at work when considering whether to stay or pursue other opportunities?



# Five generation workplace

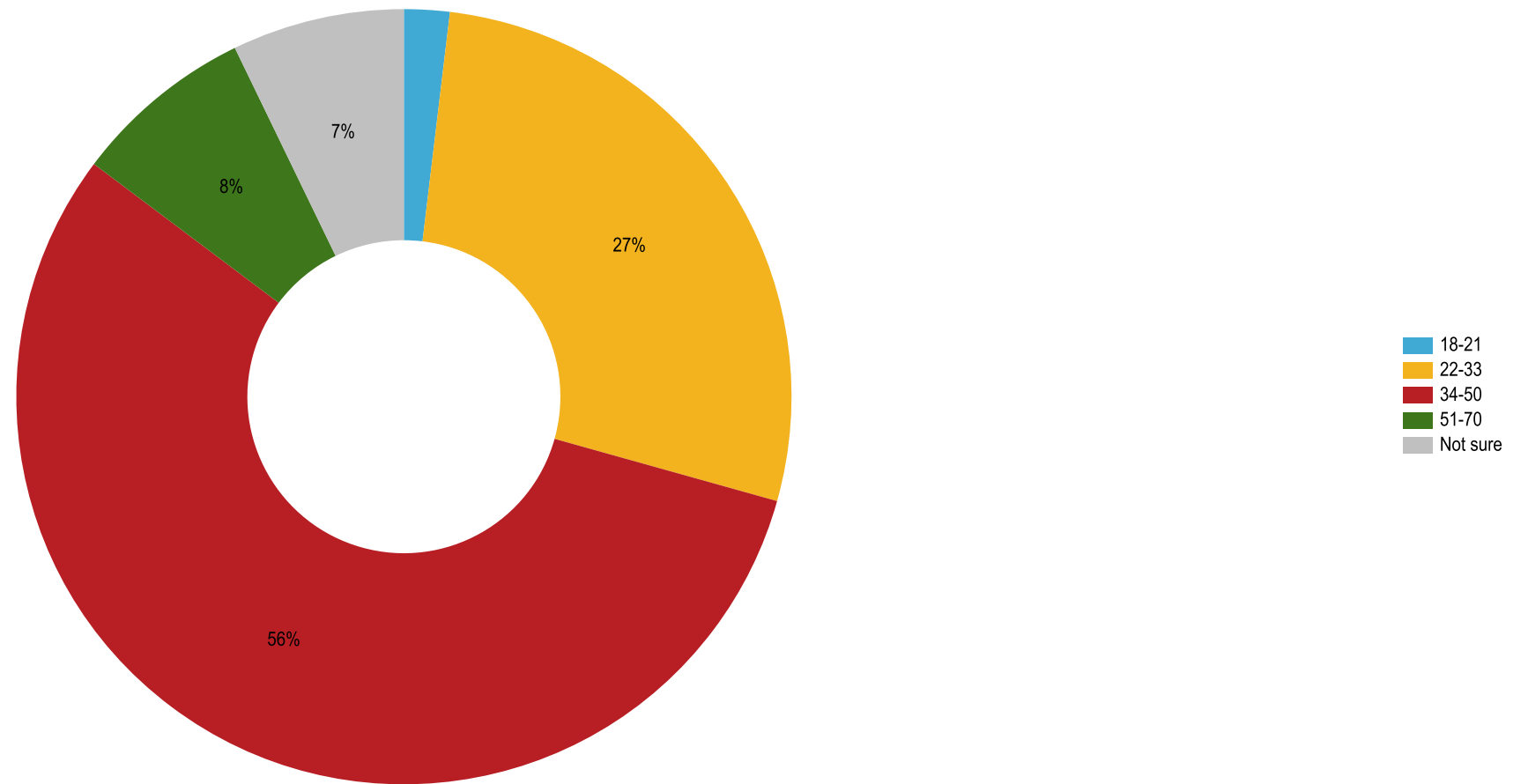
How does working in a five generation workplace impact your feelings about your workplace, does it make it more....?





# Popular age groups

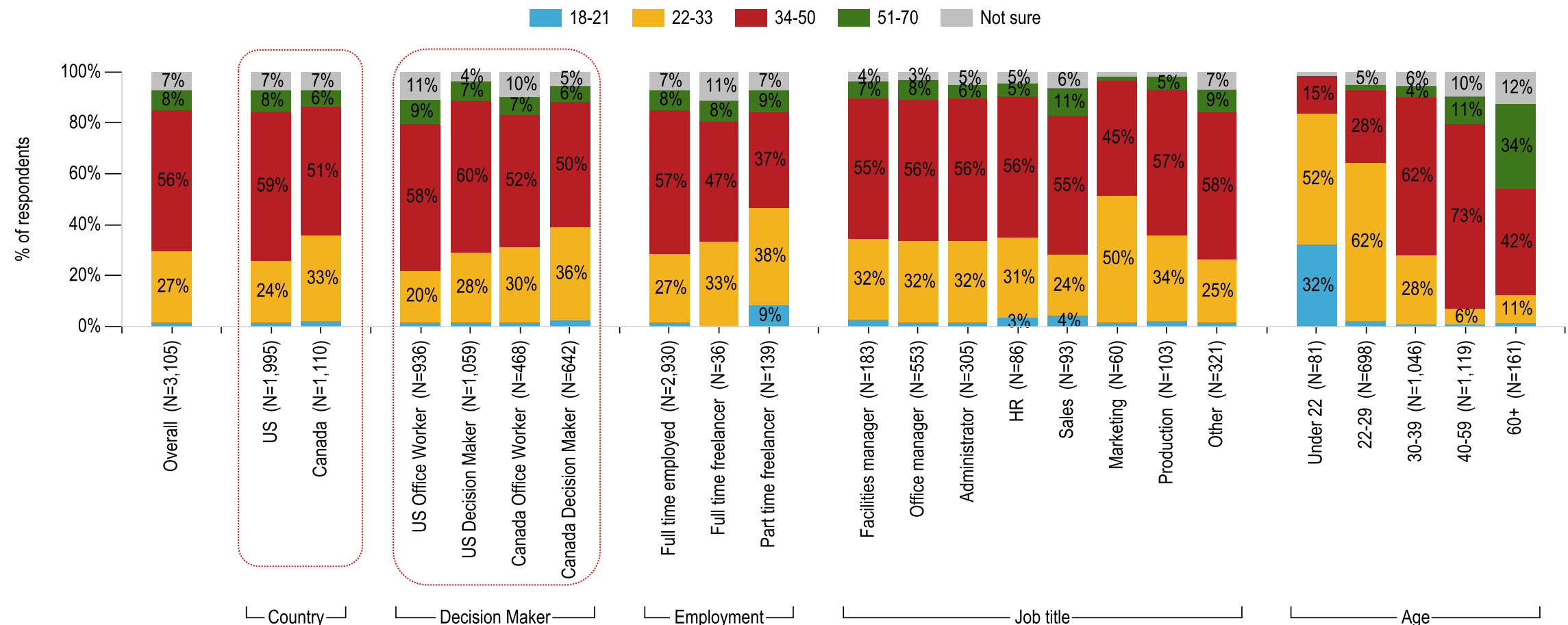
What age group do you like working with the most?



# Profile: Popular age groups

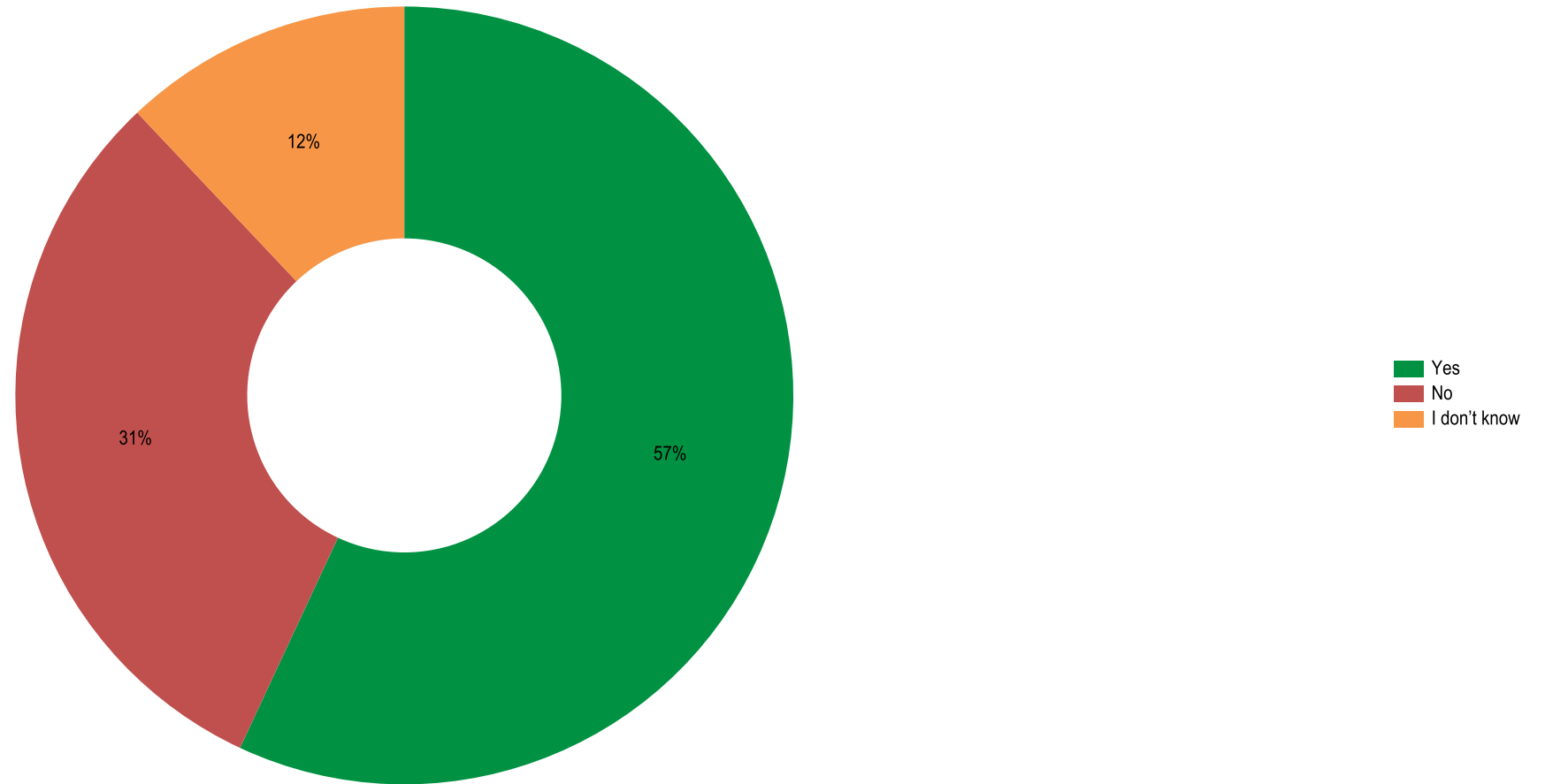
There are more decision makers in Canada who prefer working with 22-33 years old groups when compared to US (36% vs. 28%, respectively). Similar pattern applies on overall country level (Canada 33% vs. 24% US).

What age group do you like working with the most?



# Having a voice at work

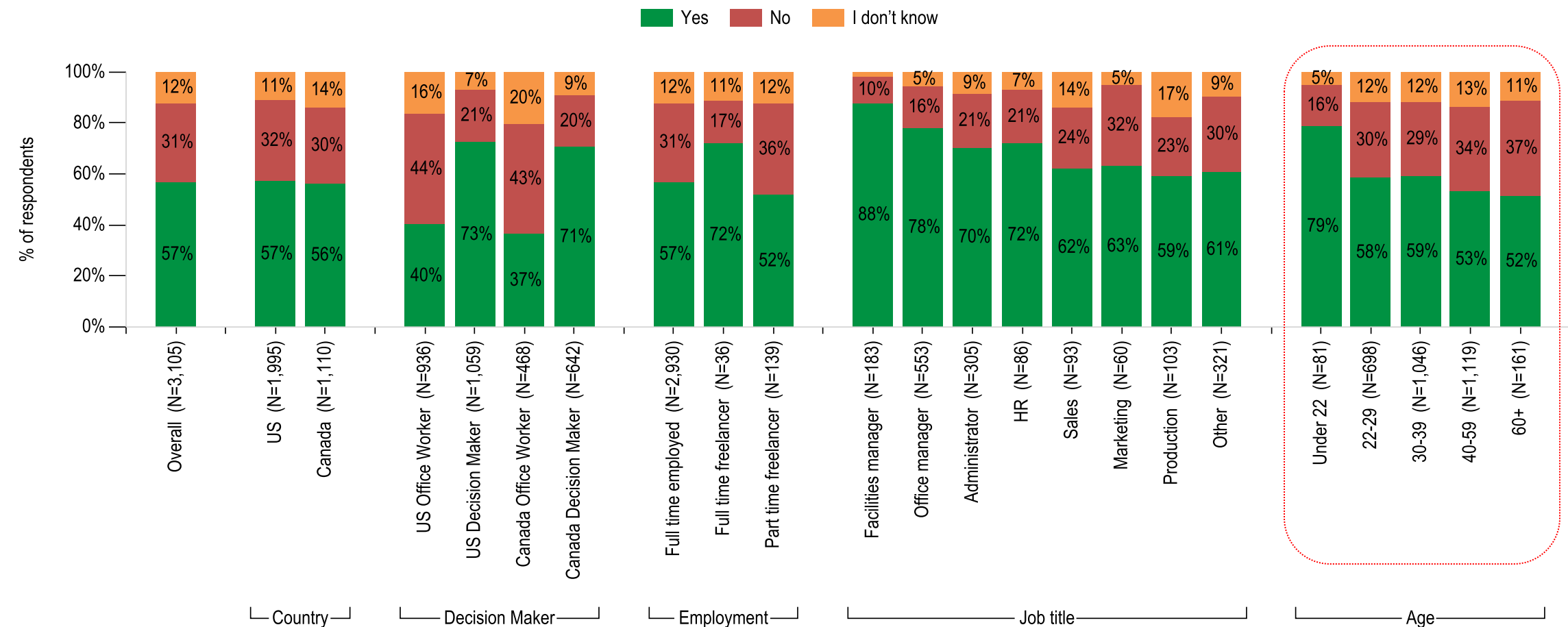
Do you feel like you have a voice and power to influence change in your organization?



# Profile: Having a voice at work

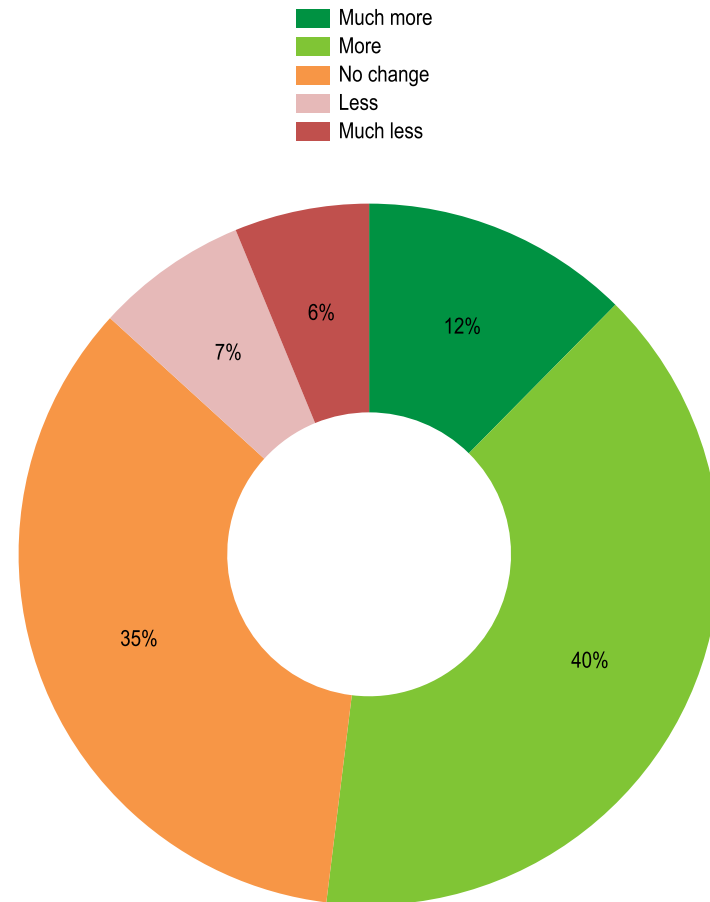
There is a greater percentage among those who are aged under 22 and claim having a voice at work when compared to other age categories.

Do you feel like you have a voice and power to influence change in your organization?



# Influence change over time

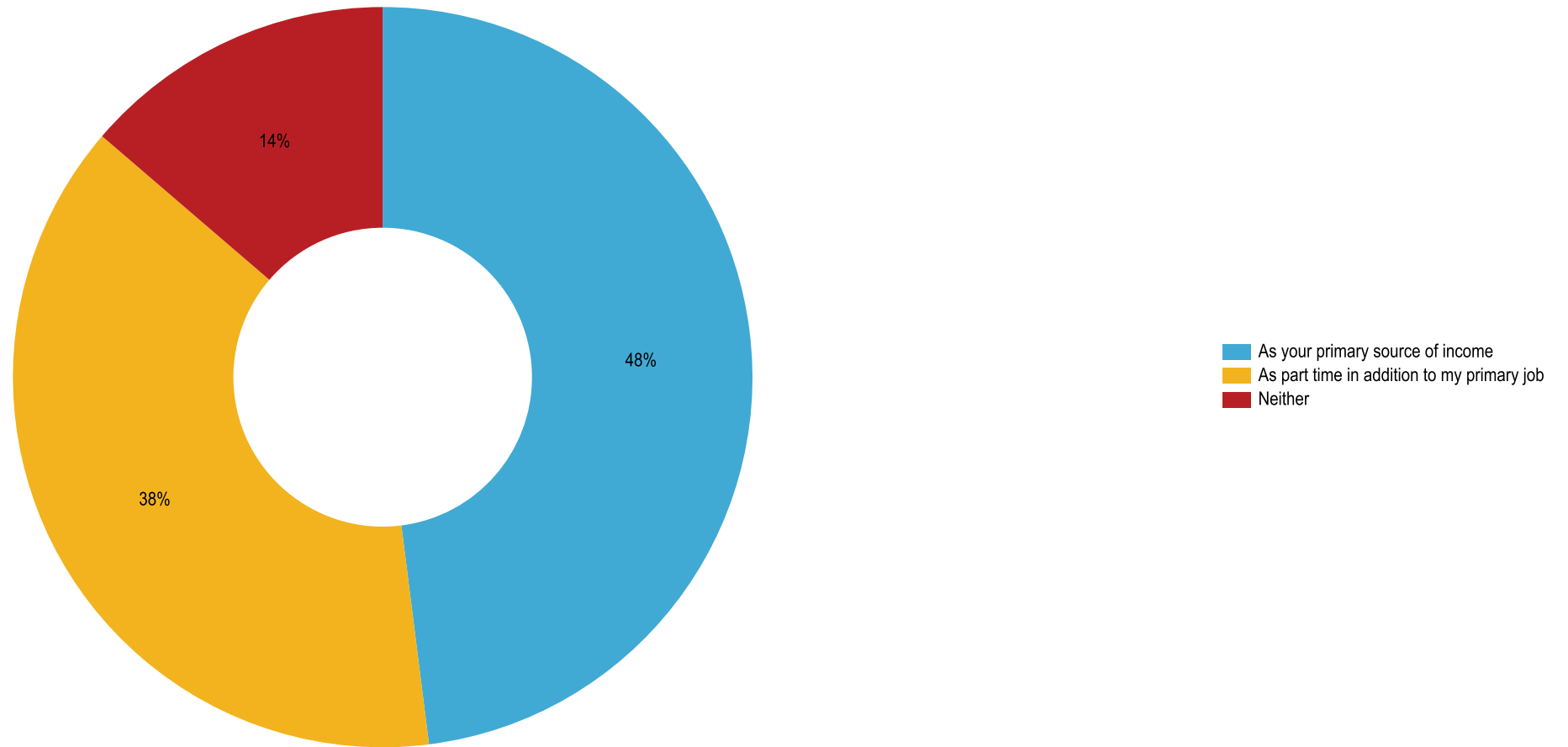
How has your voice and power to influence change in your organization changed in the last five years?



# *The Freelance Economy*

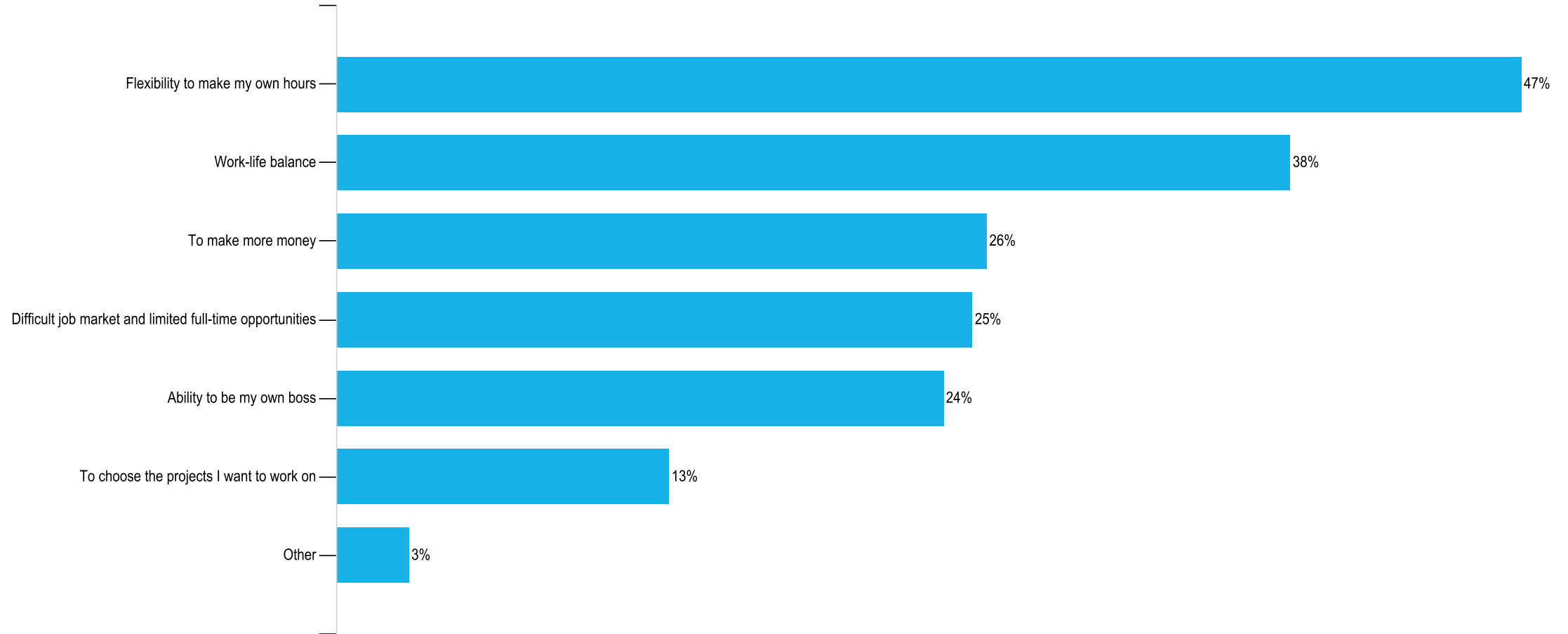
# Freelancing

Earlier you indicated that you worked freelance, is it...?



# Why people freelance

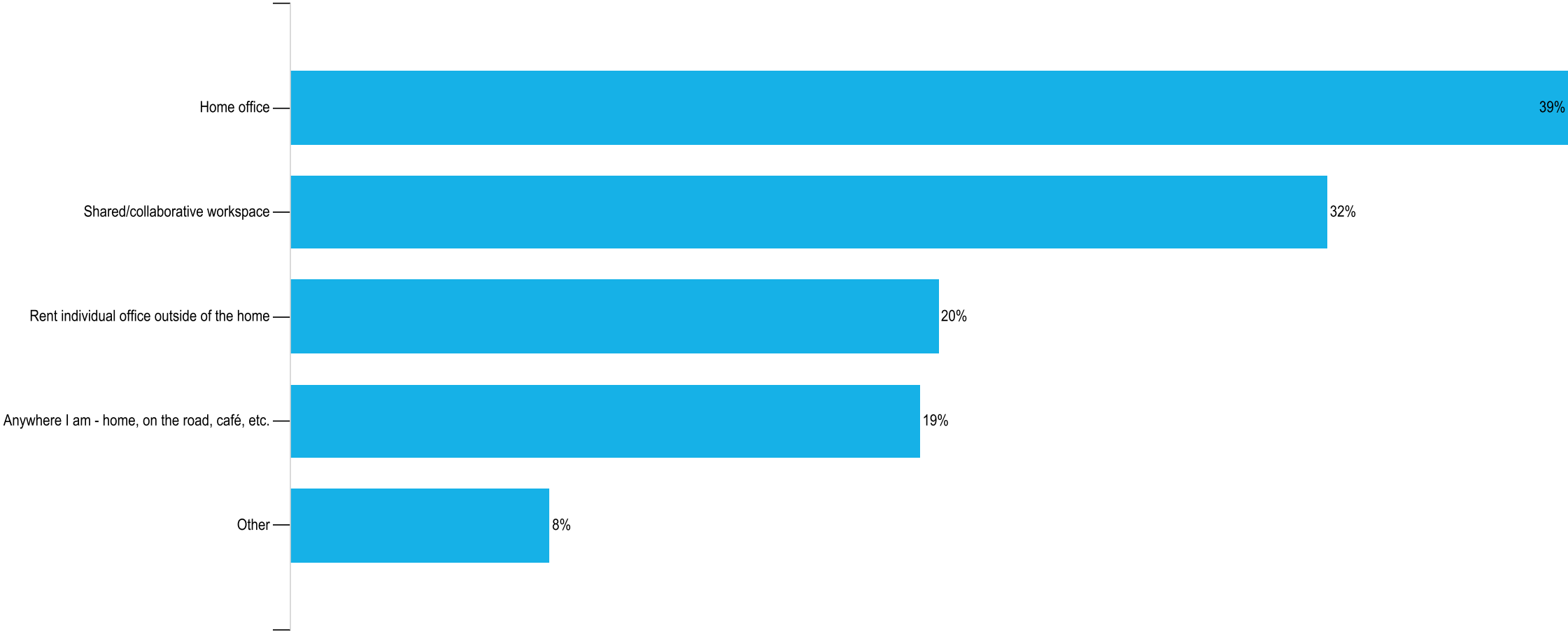
Why do you freelance?





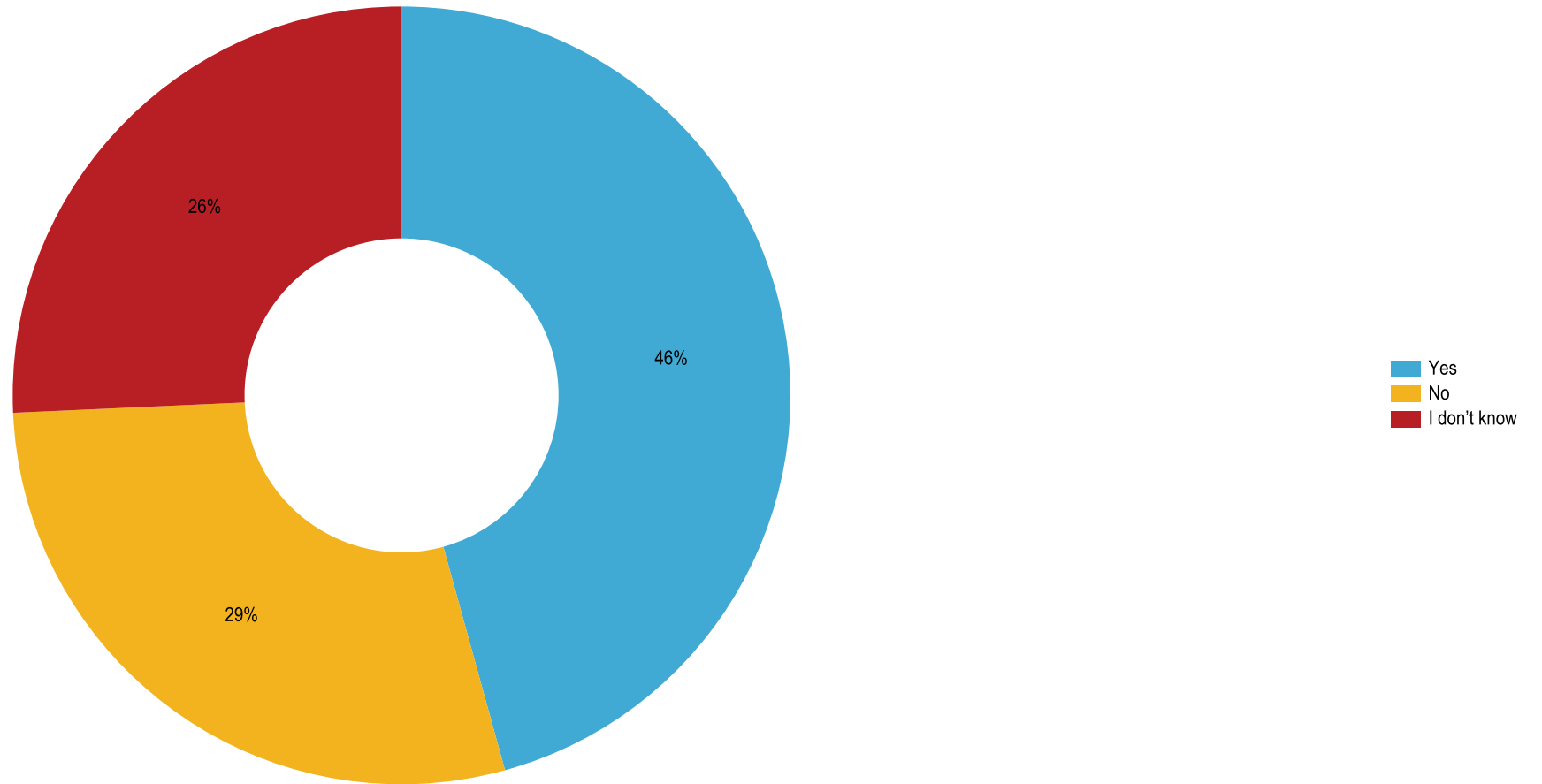
# Where people freelance

Where do you work from?



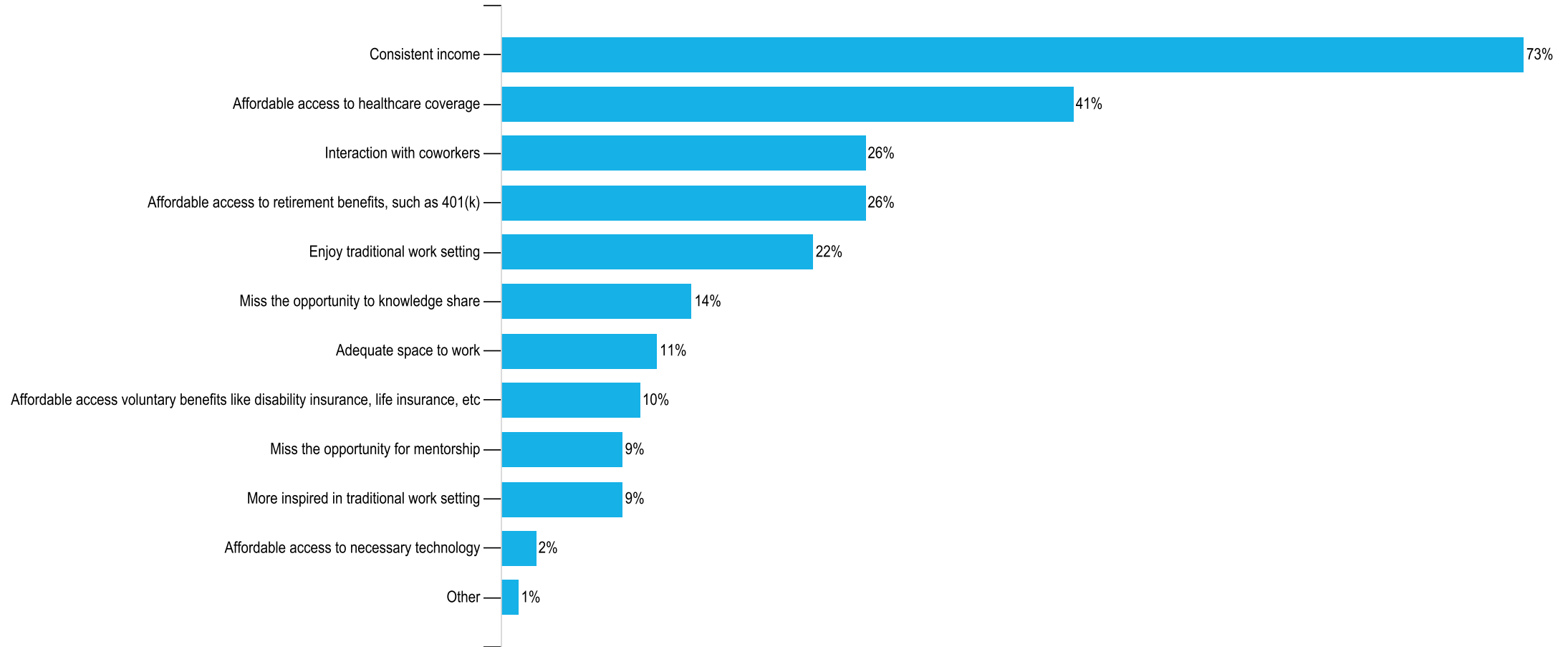
# Moving from freelance positions to a traditional job

Would you consider leaving your freelance full-time and taking a traditional job instead?



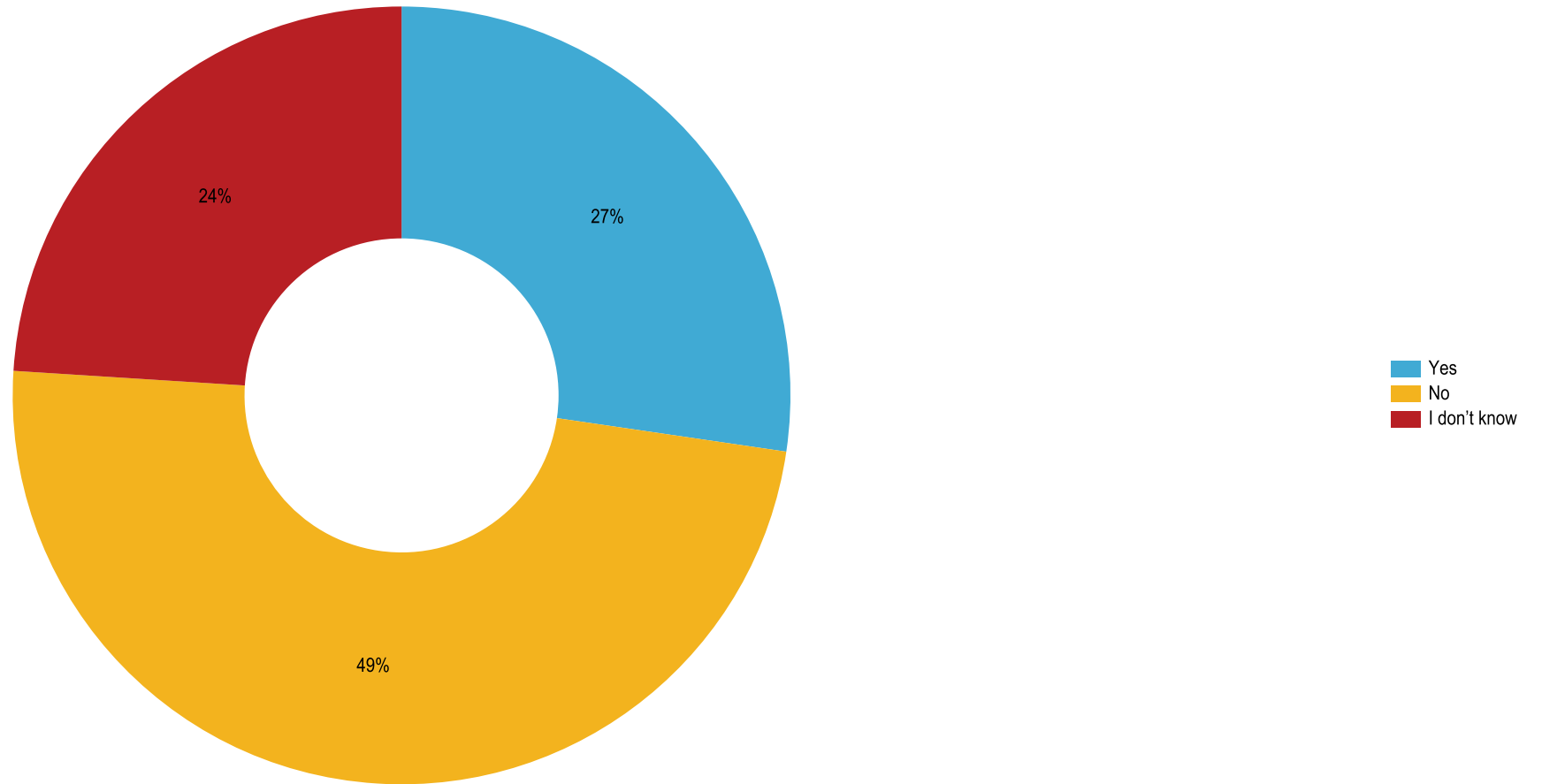
# Why people consider a traditional job

Why would you consider a traditional job?



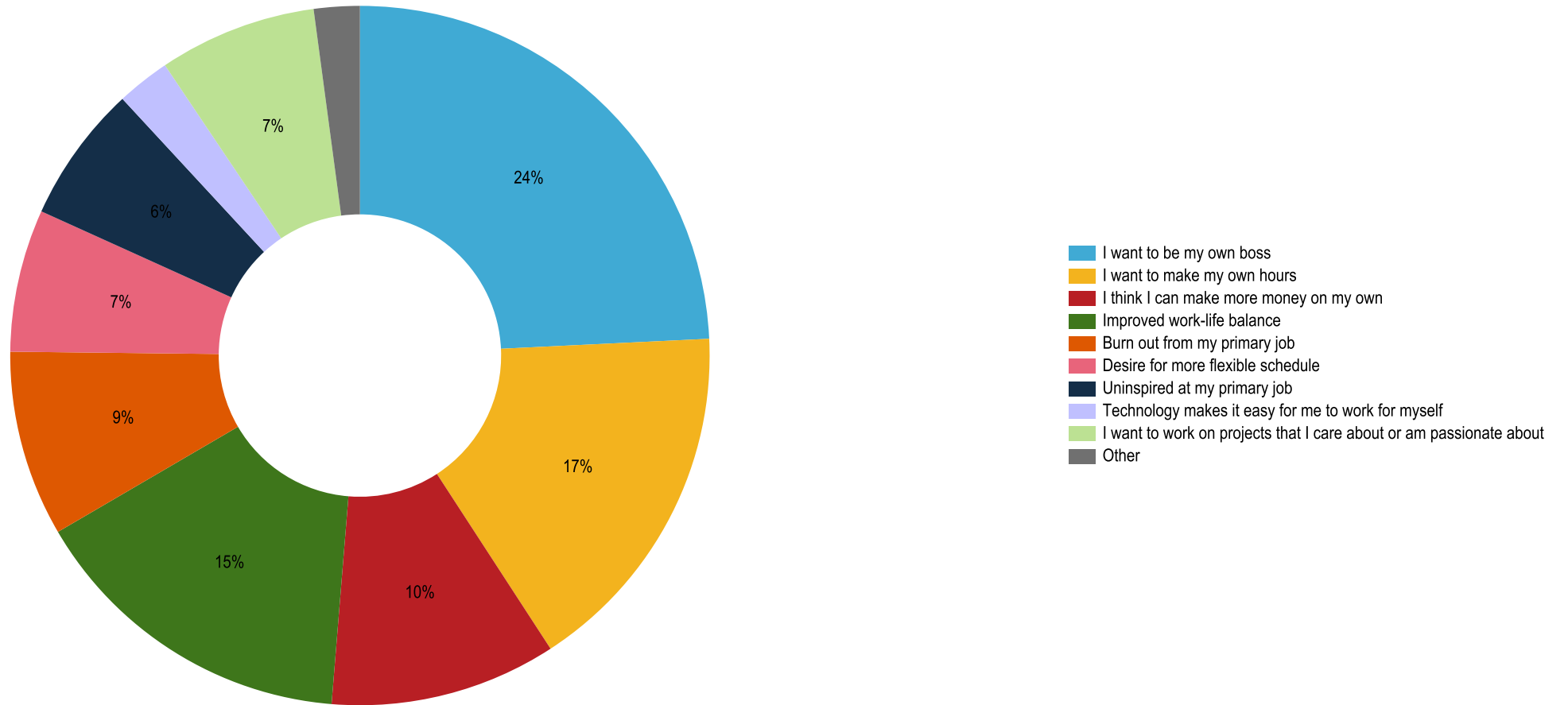
# Moving from a traditional job to a freelance position

Would you ever consider leaving your primary, traditional job to freelance full-time?



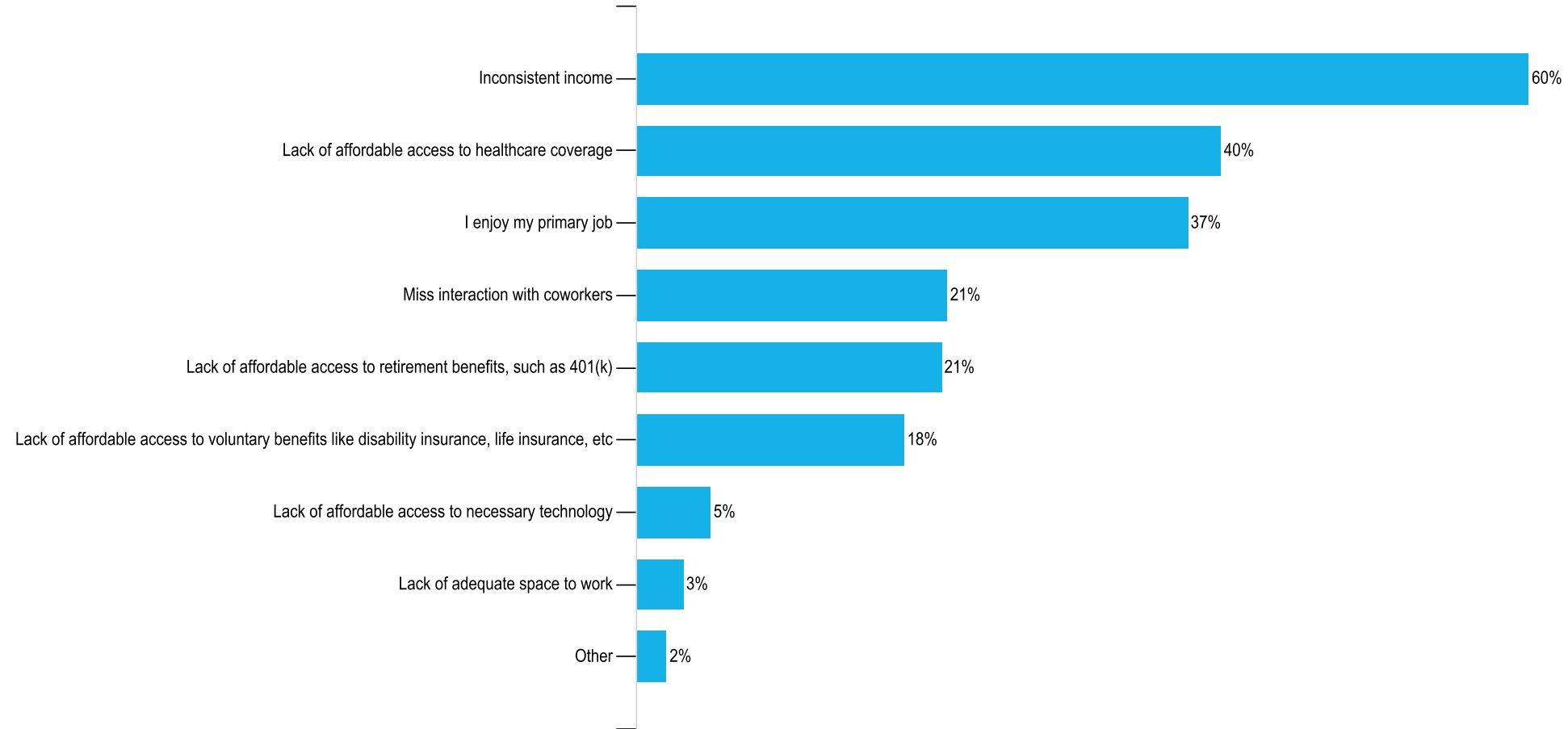
# Why people consider freelance

Why would you consider leaving your primary, traditional job to freelance?



# Why people would not consider freelancing

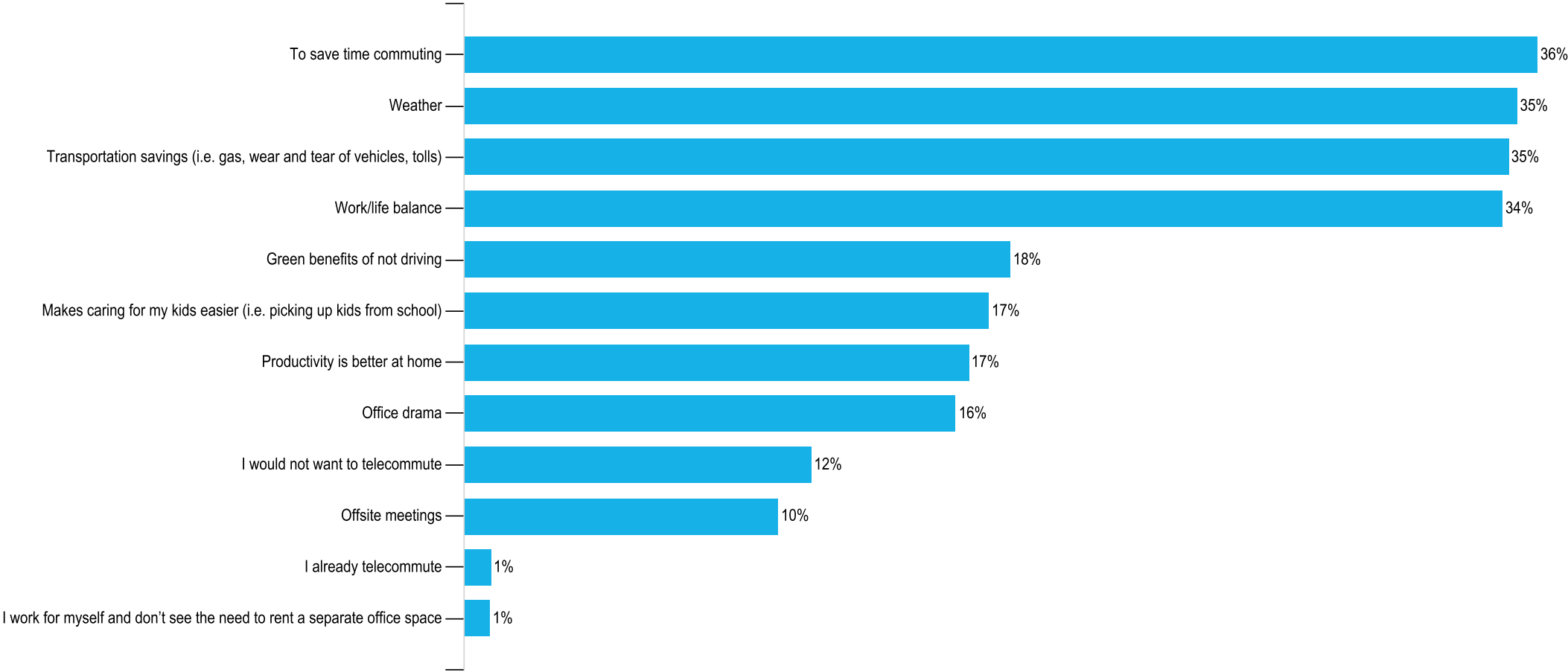
Why would you not consider leaving your primary, traditional job?



# *Telecommuting*

# Why people telecommute

Please indicate which, if any of the following, are reasons, why you would most want to telecommute?

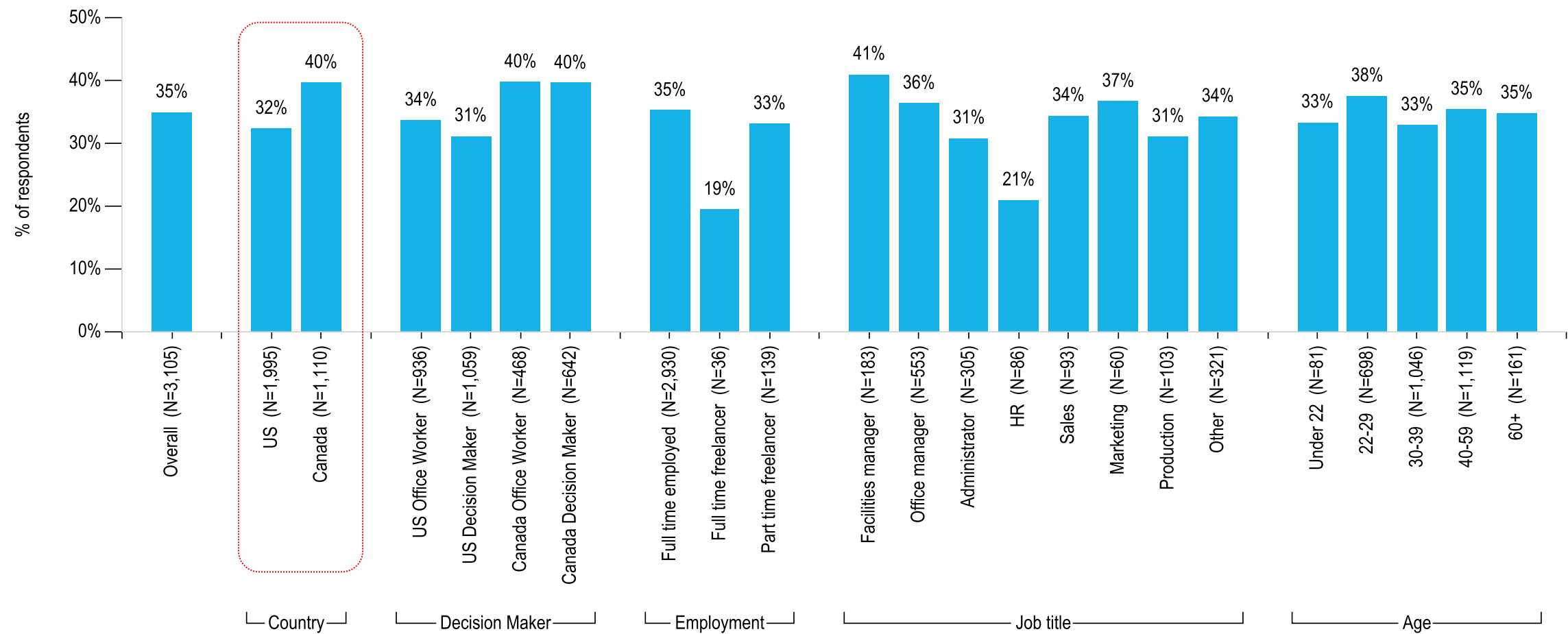




# Profile: Weather

There is a greater percentage among Canadian respondents who would like to telecommute due to weather when compared to US respondents.

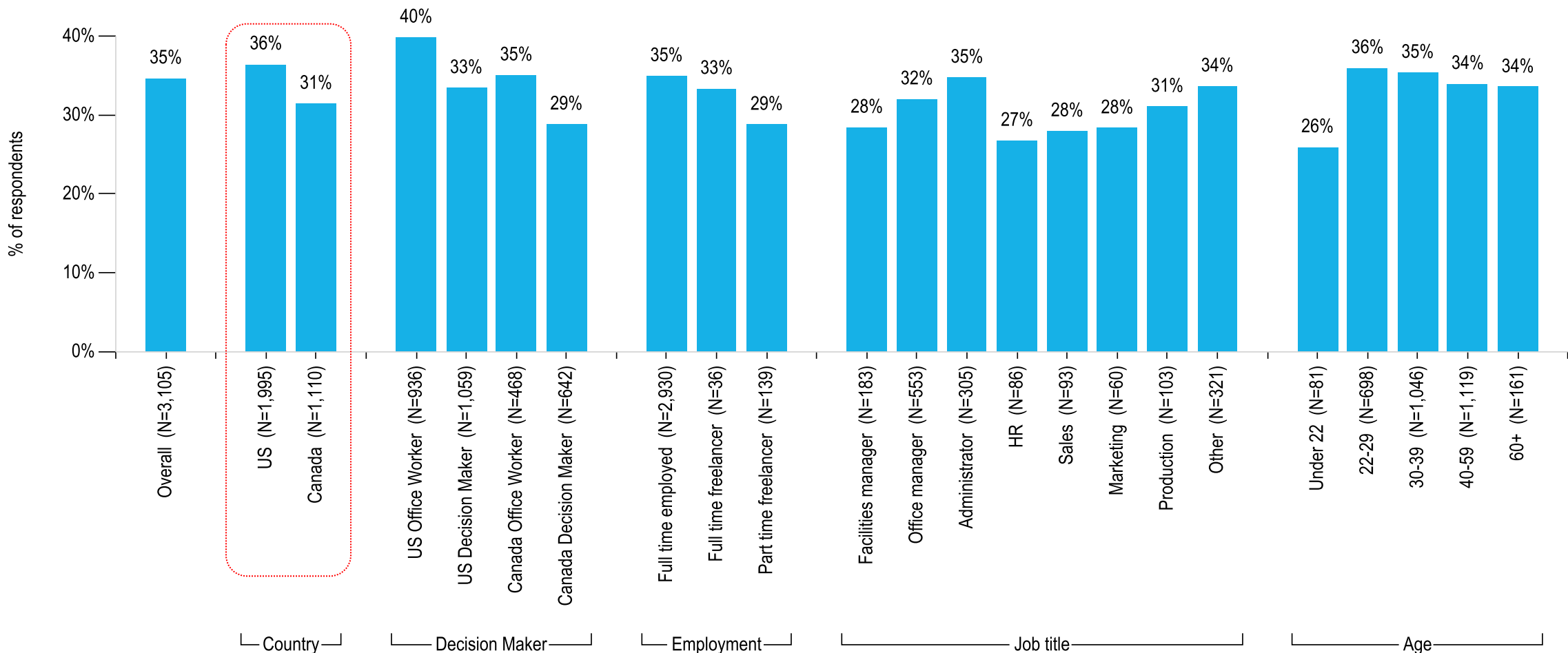
Please indicate which, if any of the following, are reasons, why you would most want to telecommute?



# Profile: Transportation savings (i.e. gas, wear and tear of vehicles, tolls)

Transportation savings are more important for US respondents as a factor to telecommute.

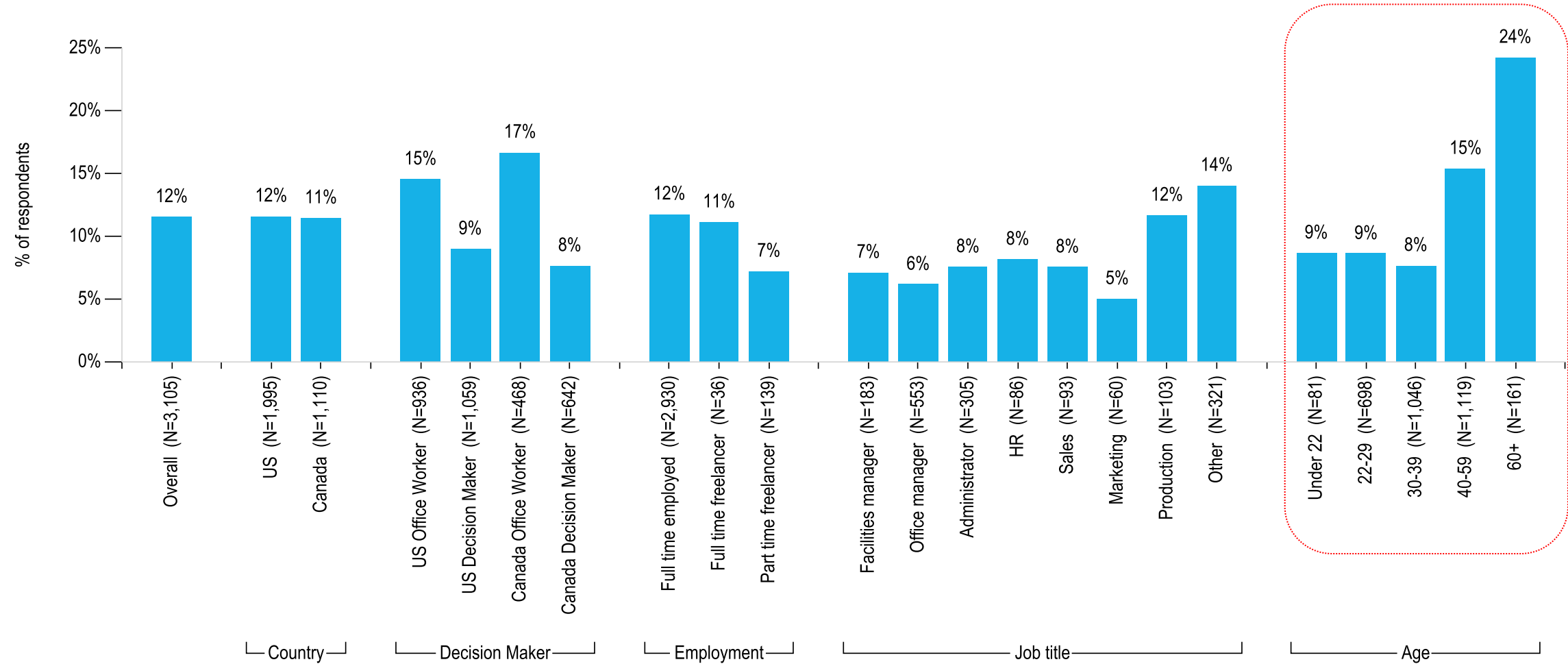
Please indicate which, if any of the following, are reasons, why you would most want to telecommute?



# Profile: I would not want to telecommute

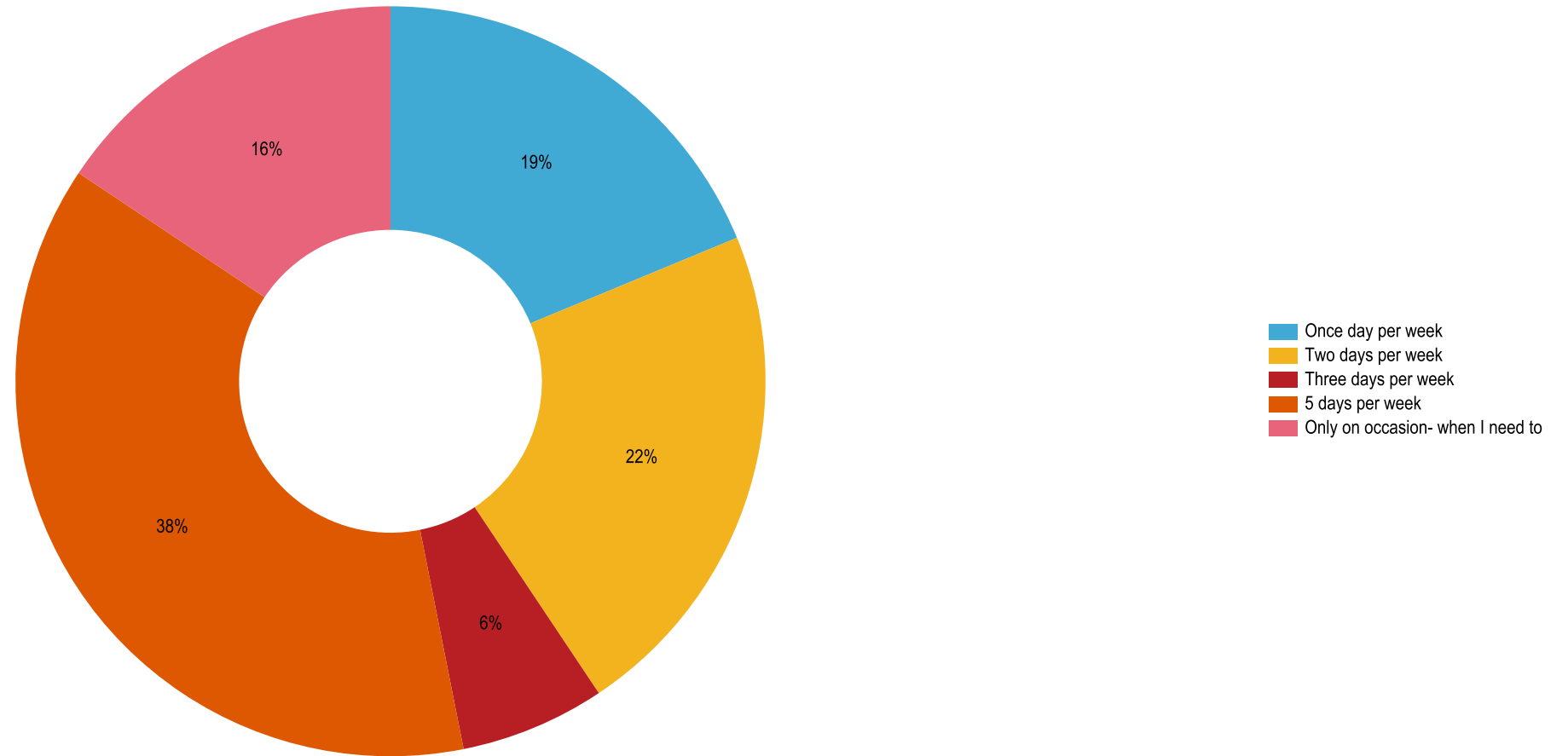
The group of respondents aged over 60 years old is more likely to oppose telecommuting than other age groups.

Please indicate which, if any of the following, are reasons, why you would most want to telecommute?



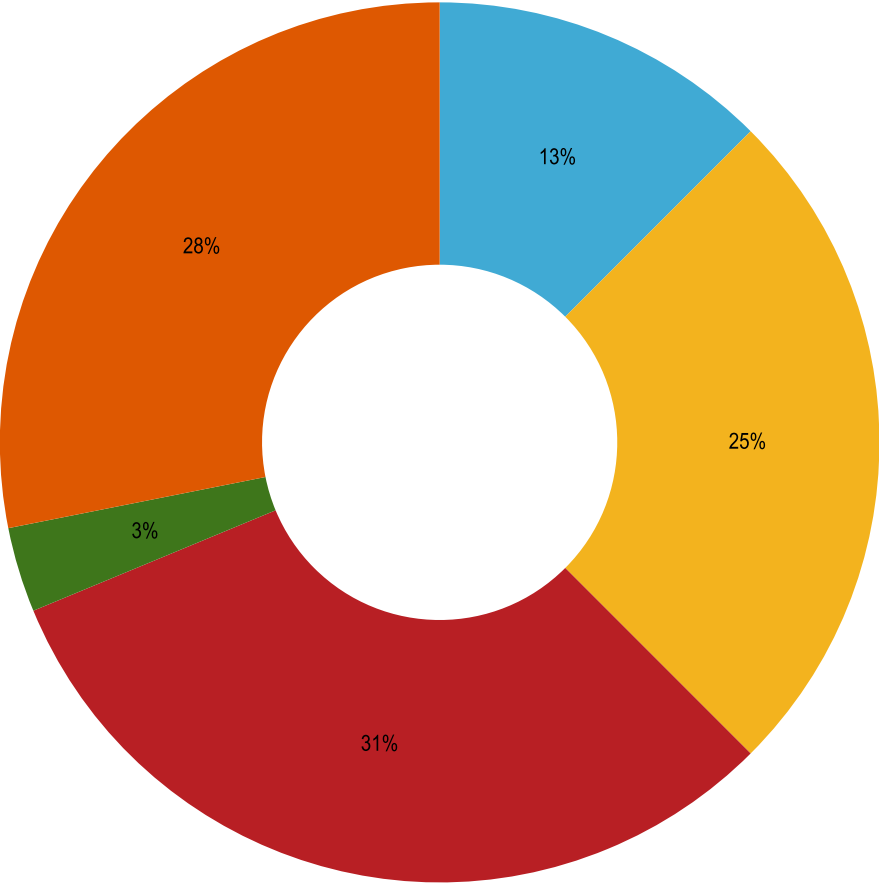
# How often people telecommute

How often do you telecommute? Please consider either full days or half days.



# Reaction to no more telecommuting

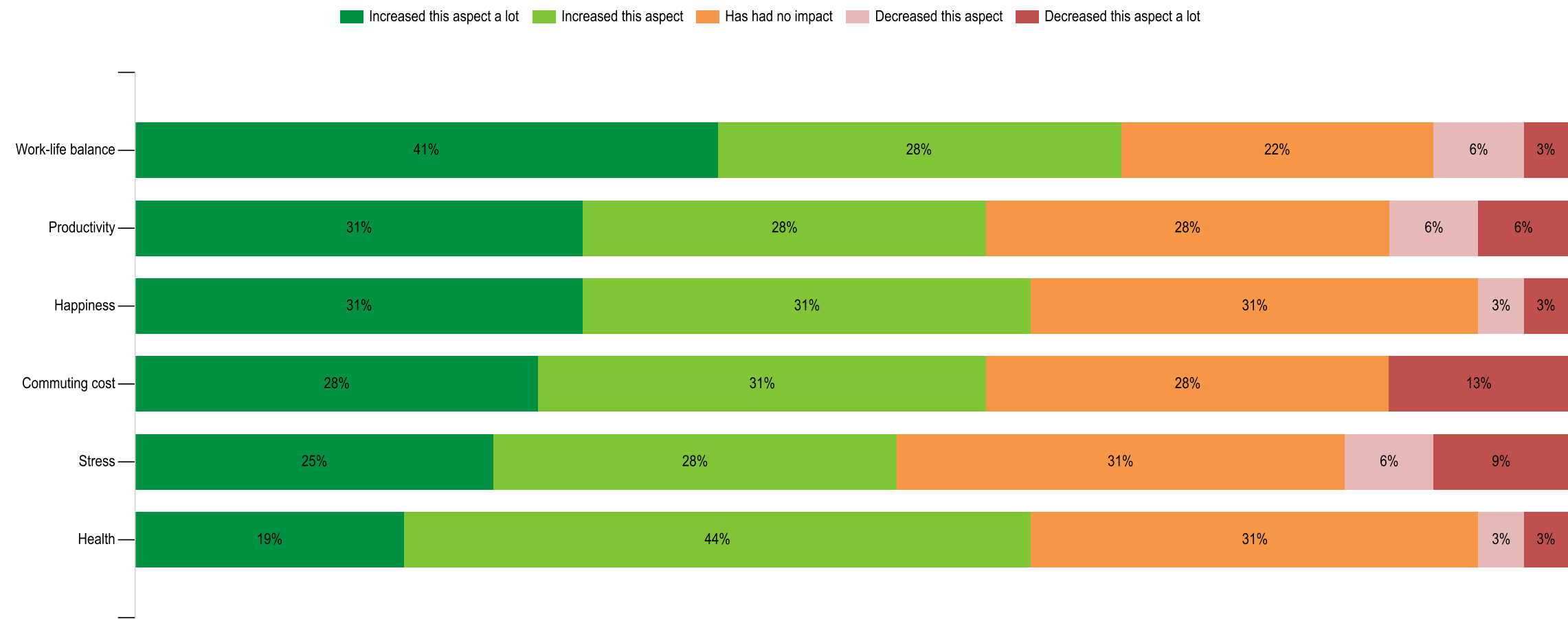
Which of the following would best describe your reaction if you found out you no longer are able to telecommute?



- I would seek another job
- Satisfaction with my job would be significantly reduced
- I would be disappointed but would make it work
- I would be happy; I find telecommuting a hindrance to a productive work environment
- Would not make a difference

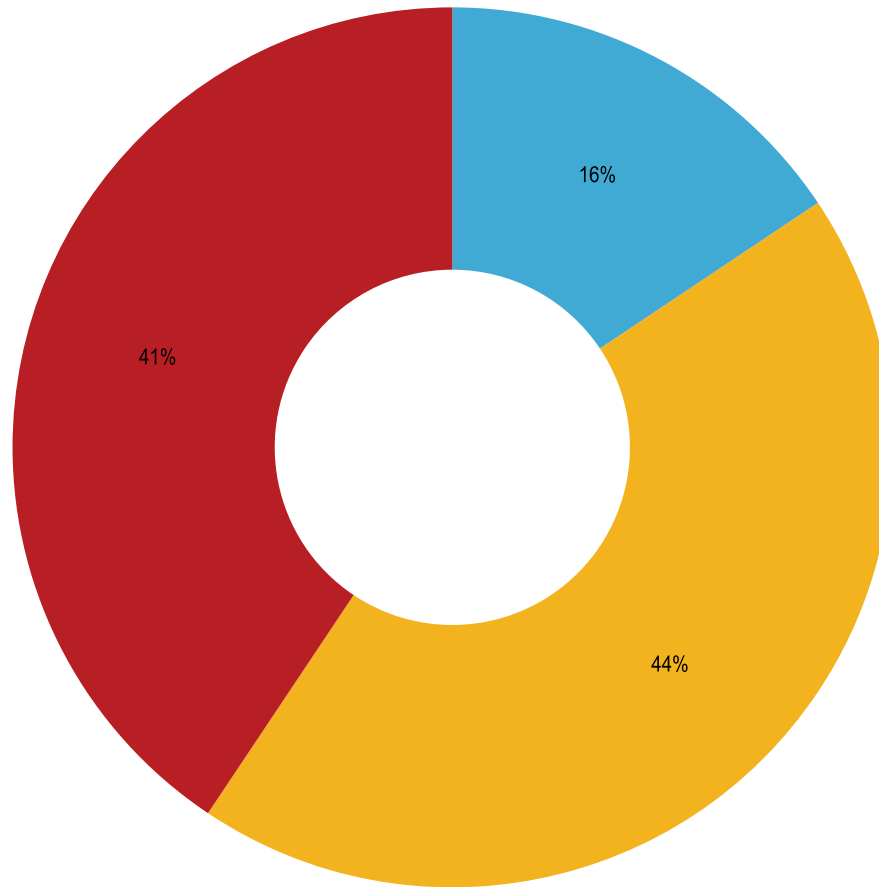
# Impact of telecommuting

How has telecommuting affected each of the following aspects of your life?



# Working hours change because of telecommuting

Do your daily working hours increase, decrease or stay the same when you work from home?



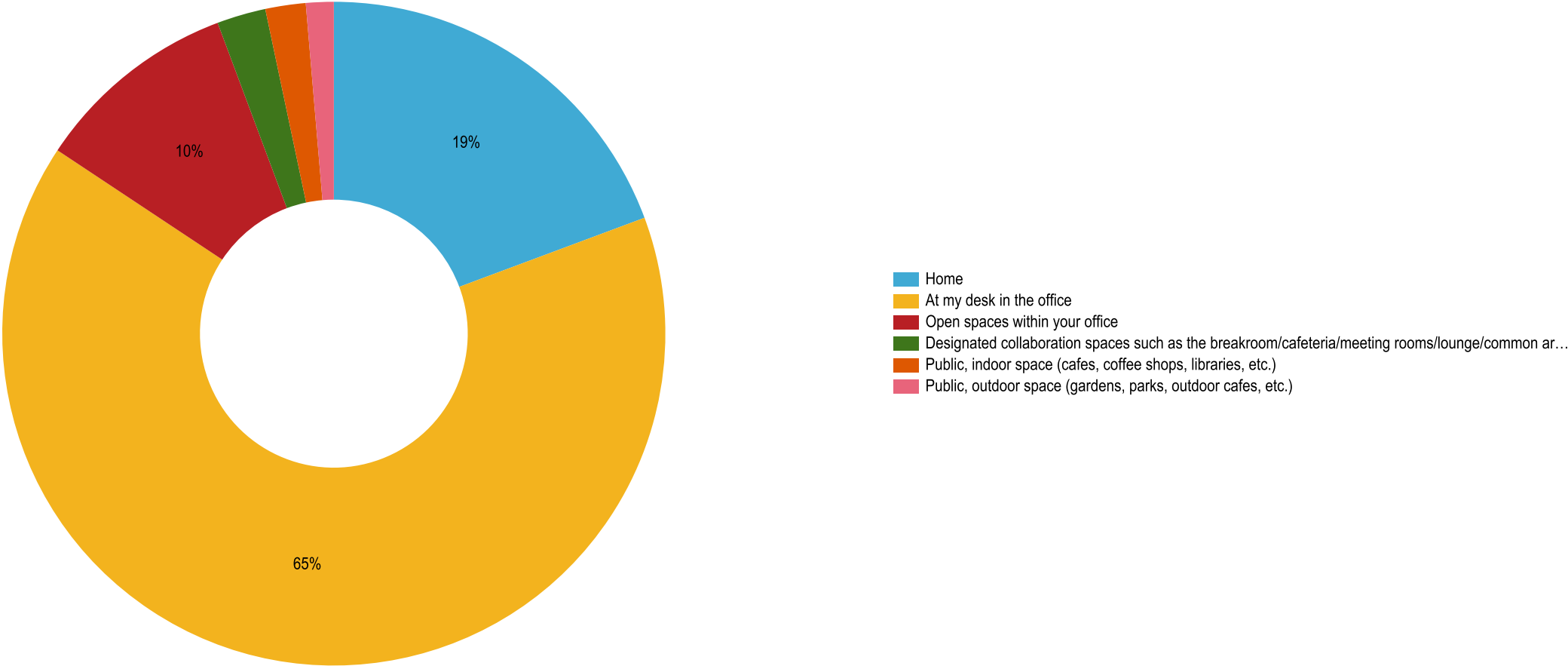
- I work longer hours at home
- I work fewer hours at home
- I work the same hours as when I'm in the office

# *Workplace Productivity*



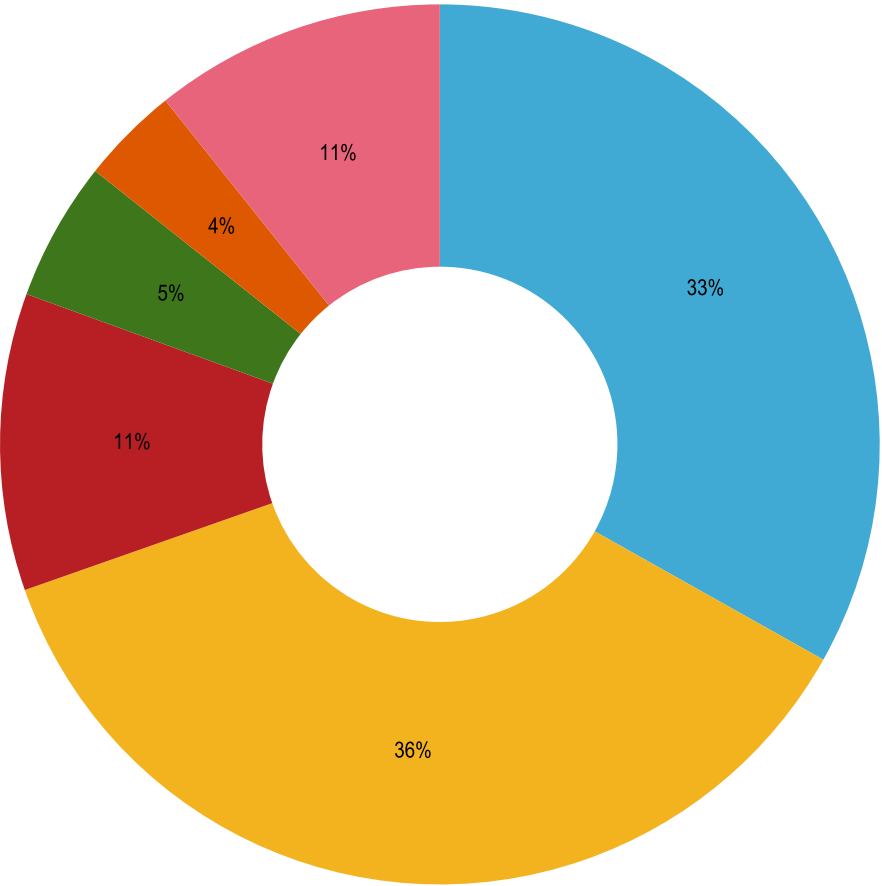
# Where people are most productive

Where are you most productive in terms of getting work done?



# Where people are most inspired

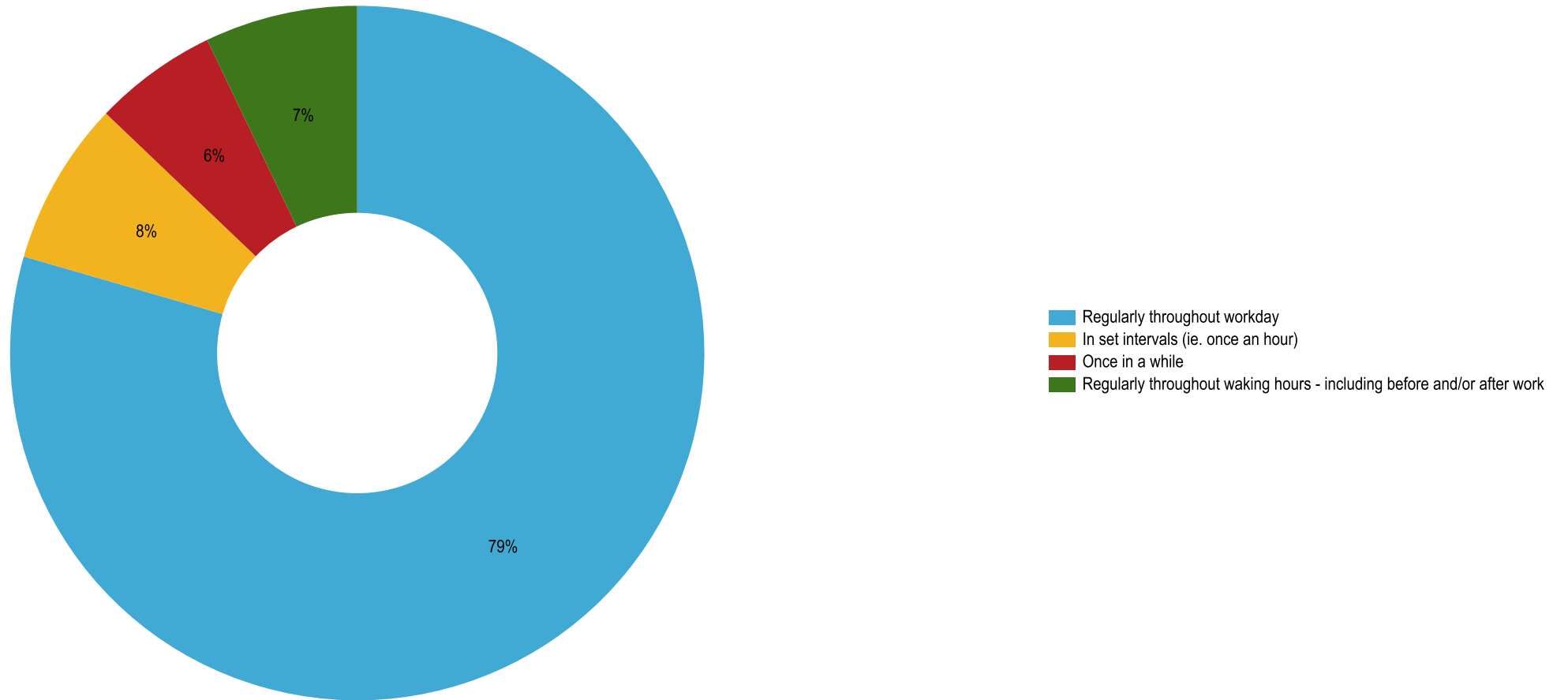
Where are you most inspired?



- Home
- At my desk in the office
- Open spaces within your office
- Designated collaboration spaces such as the breakroom/cafeteria/meeting rooms/lounge/common ar...
- Public, indoor space (cafes, coffee shops, libraries, etc.)
- Public, outdoor space (gardens, parks, outdoor cafes, etc.)

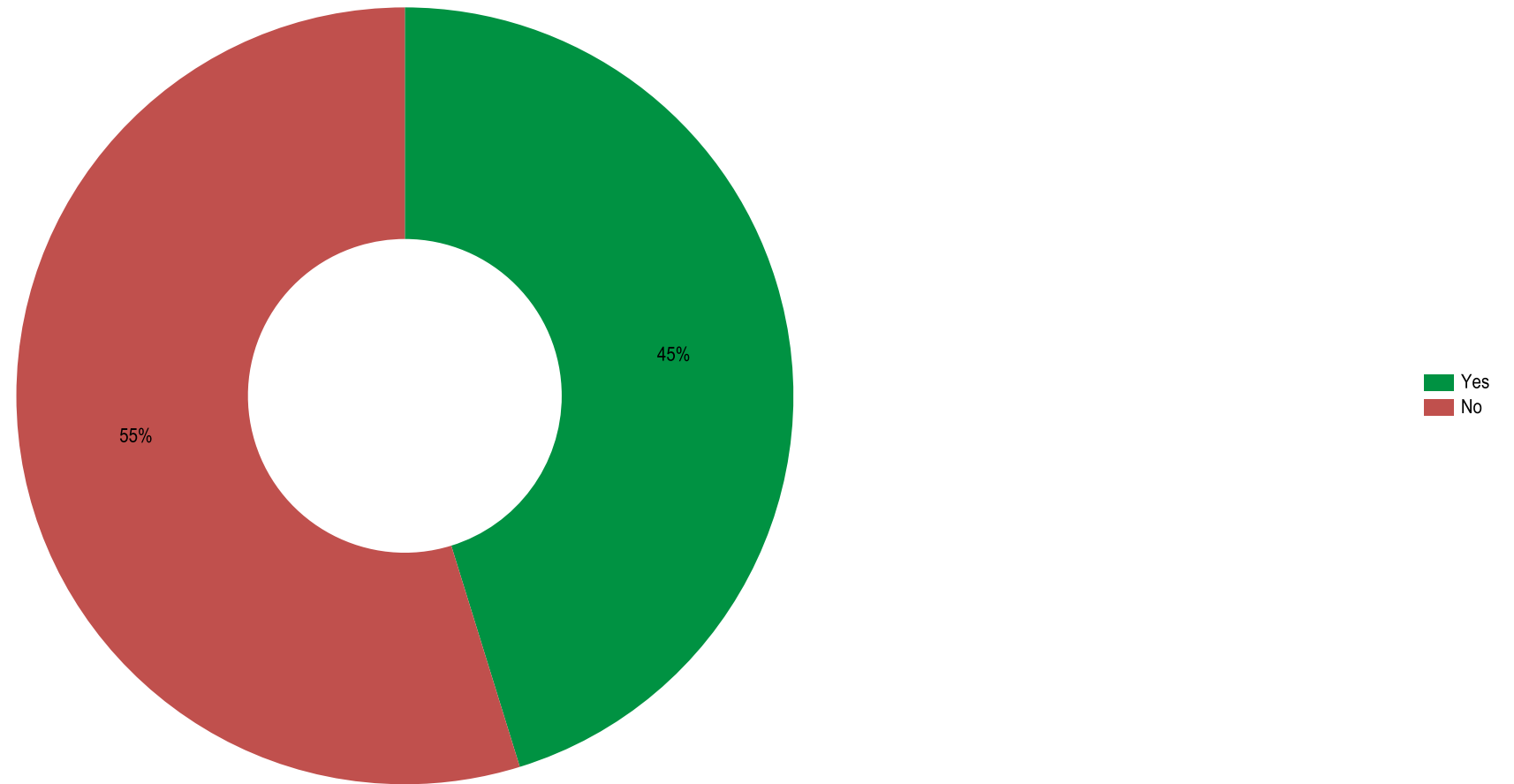
# Checking emails

How often do you check your email?



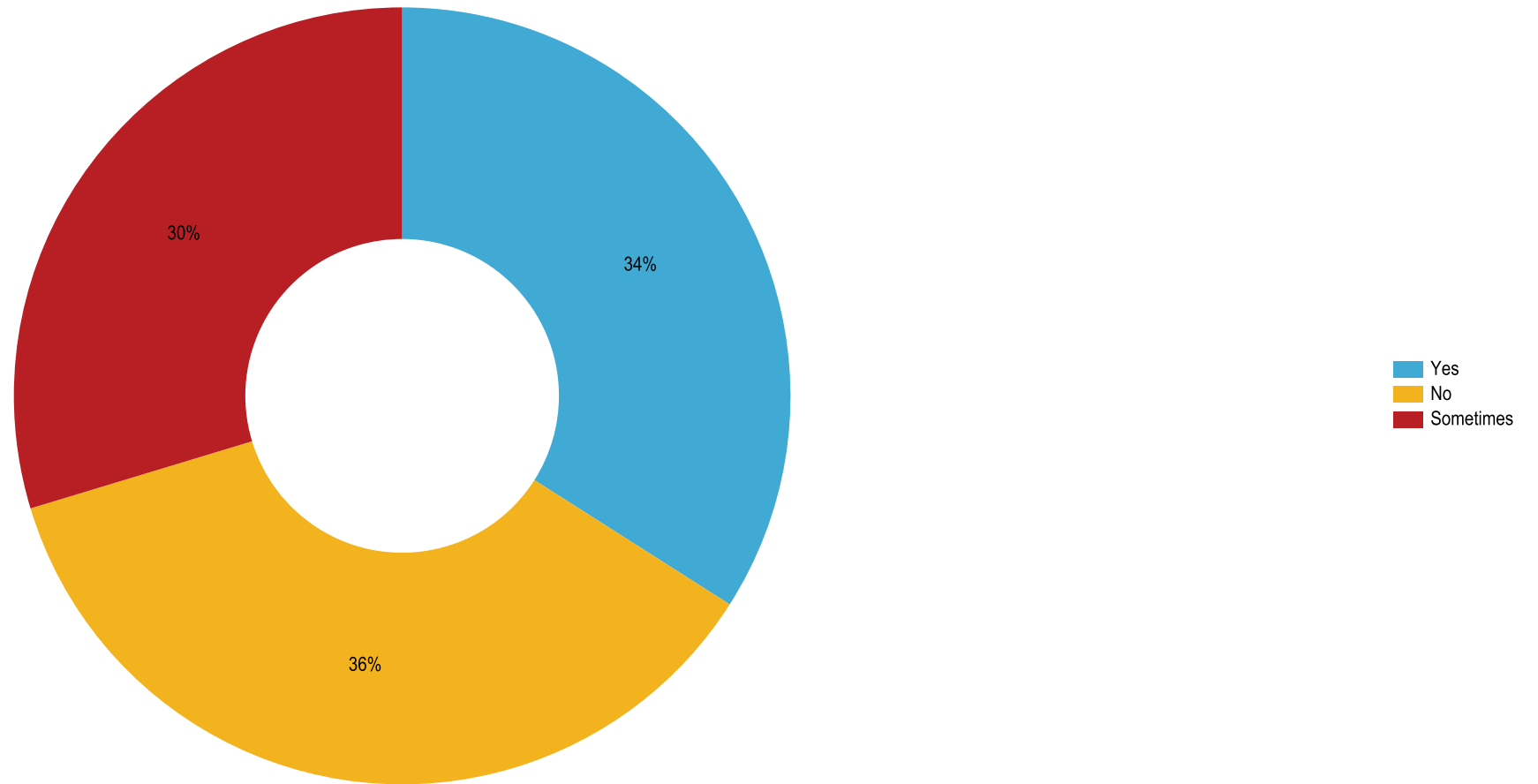
# Email overload

Would you say you get too many emails?



# The impact of email overload

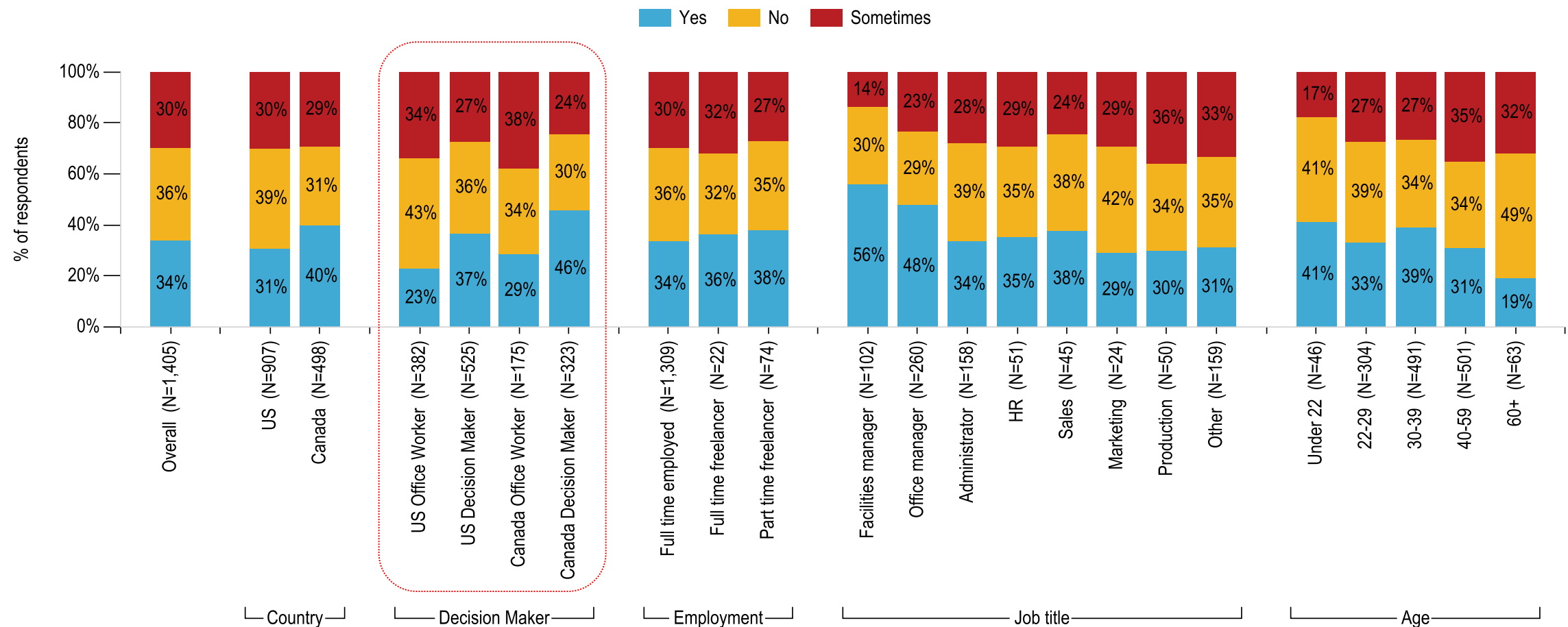
Is it impacting your productivity?



# Profile: The impact of email overload

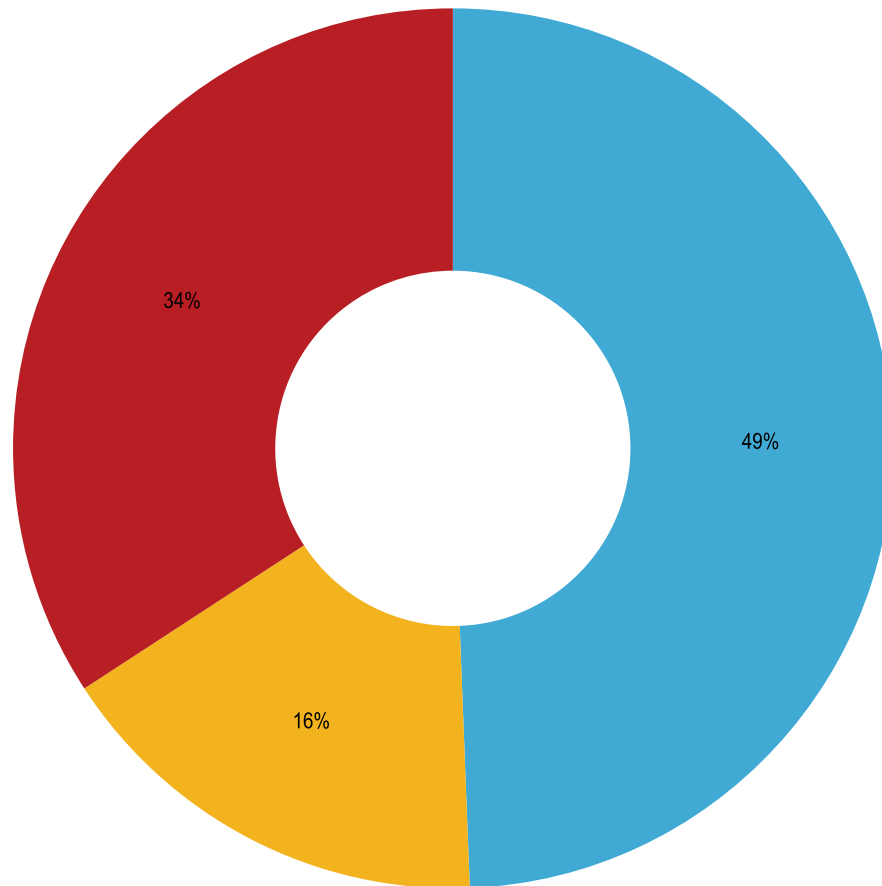
The decision makers in Canada experience an impact of email overload on their productivity more often when compared to US colleagues.

Is it impacting your productivity?



# Reducing emails

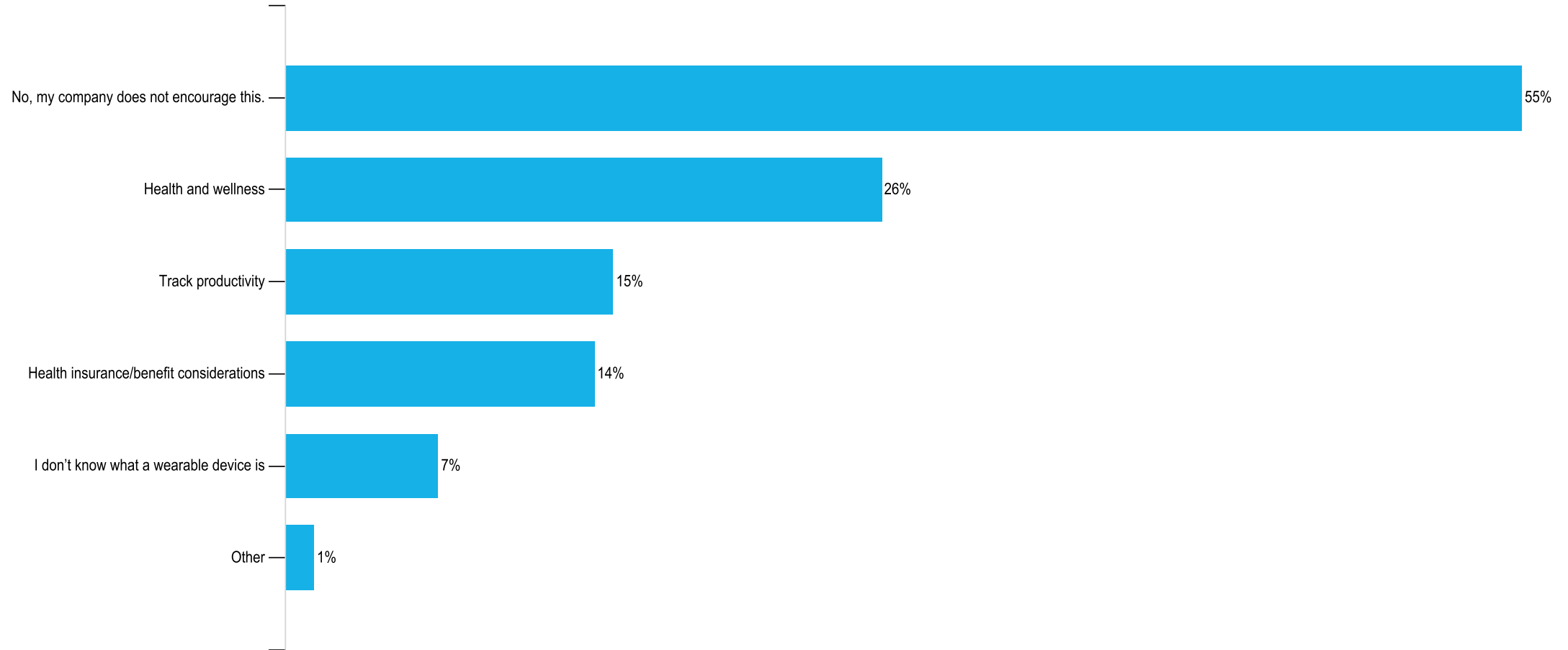
What would you do to reduce the number of emails you receive?



- More live conversations
- More group meetings
- Use more work collaboration tools (technology that makes it easier for people to work together, like E...)

# Wearable devices

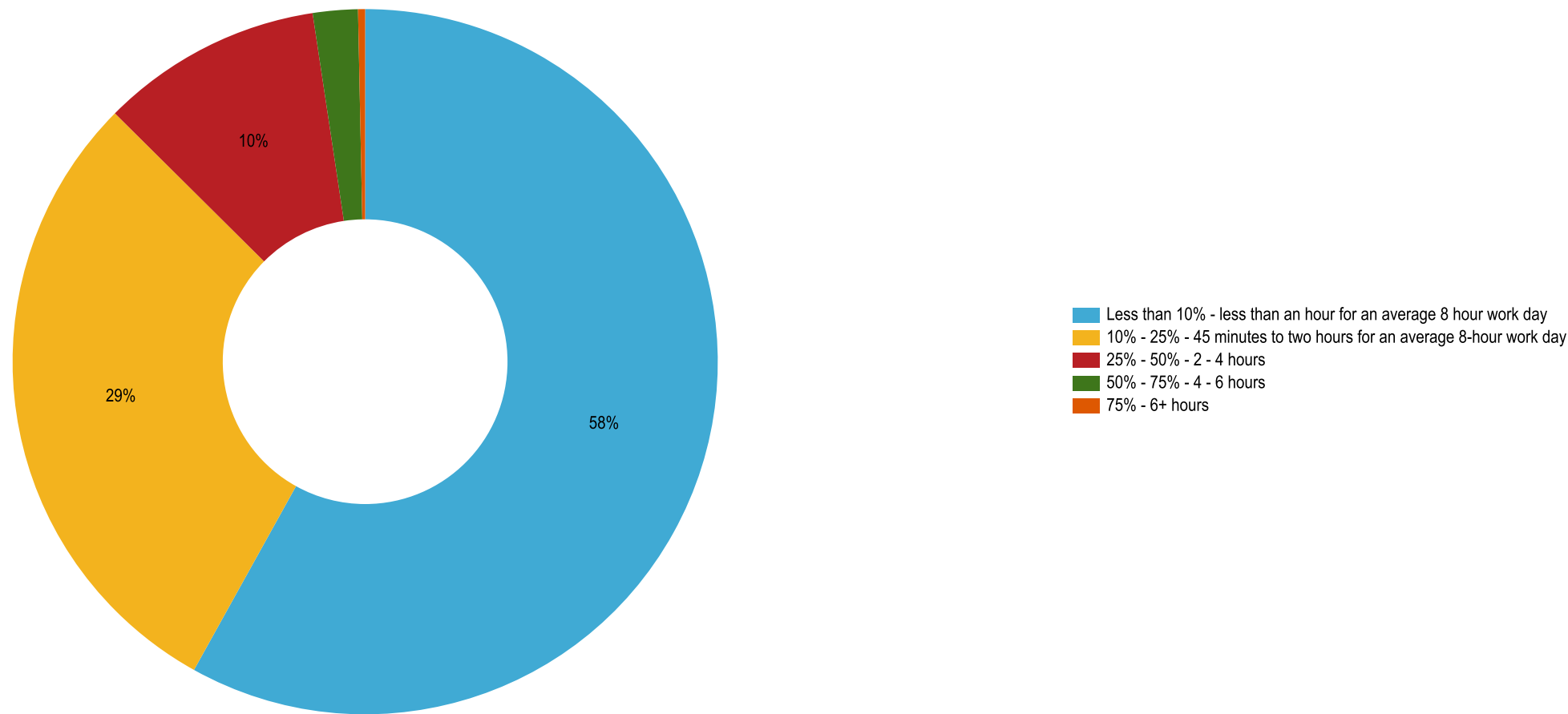
Does your company provide or encourage the use of wearable devices during work? If so, for what purpose?





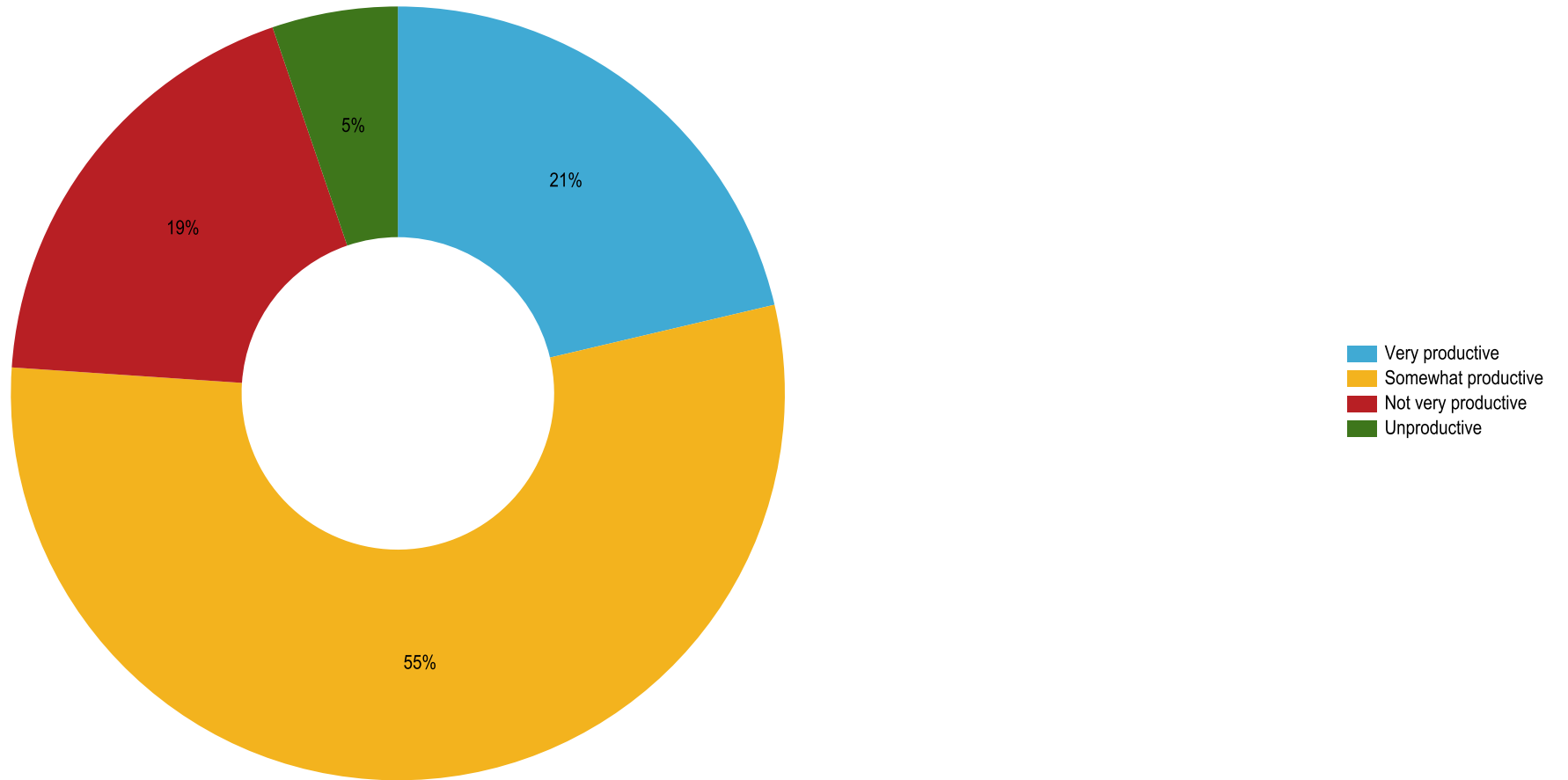
# Percentage meetings

What percentage of your work day is consumed by meetings?



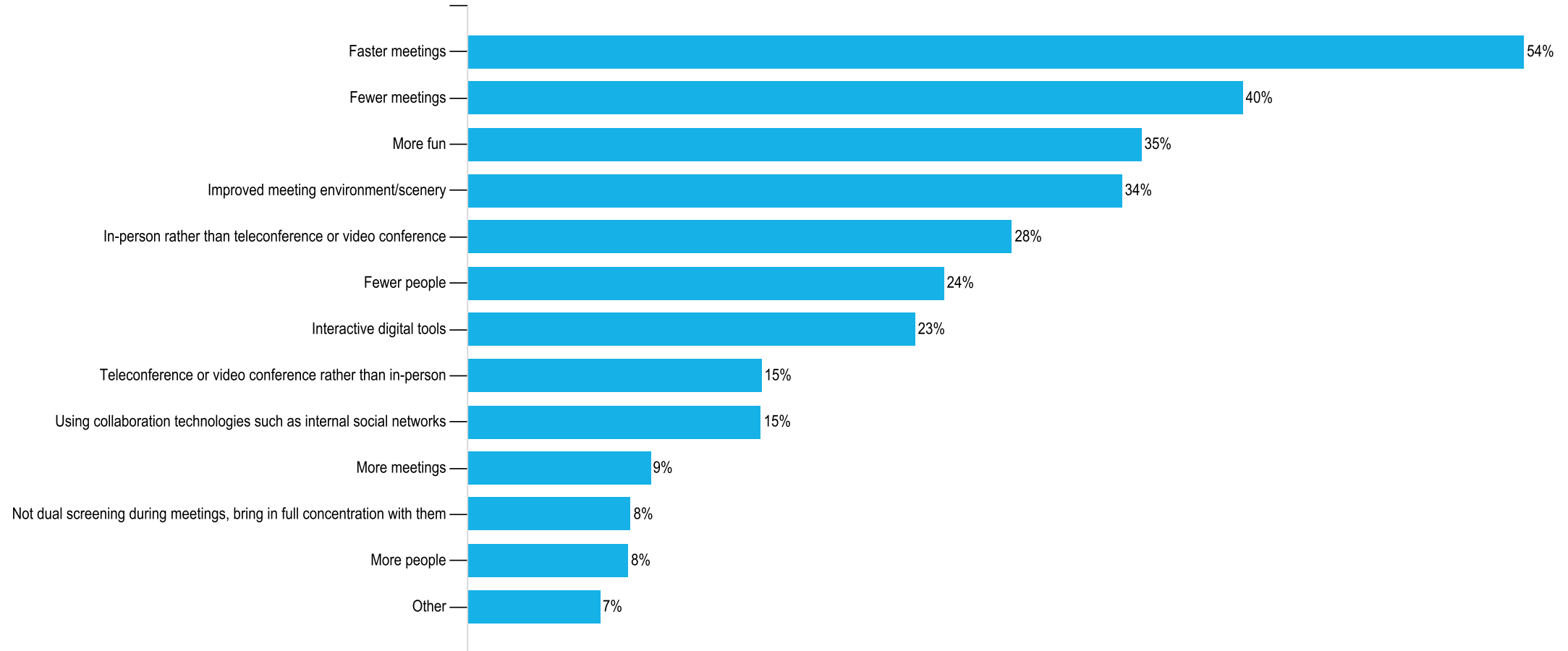
# Productivity of meetings

How productive are these meetings?



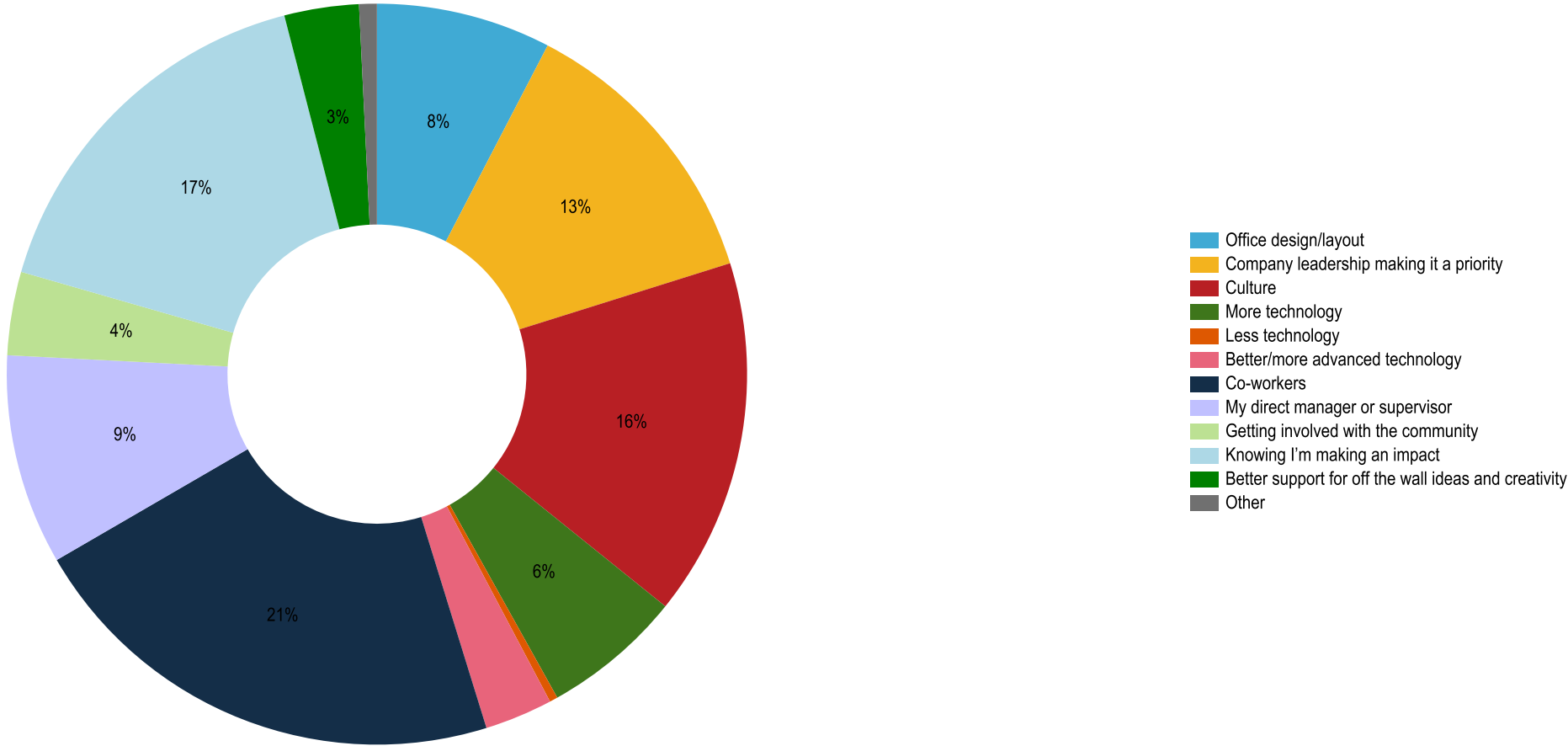
# More productive meetings

What would improve the results/output of your meetings?



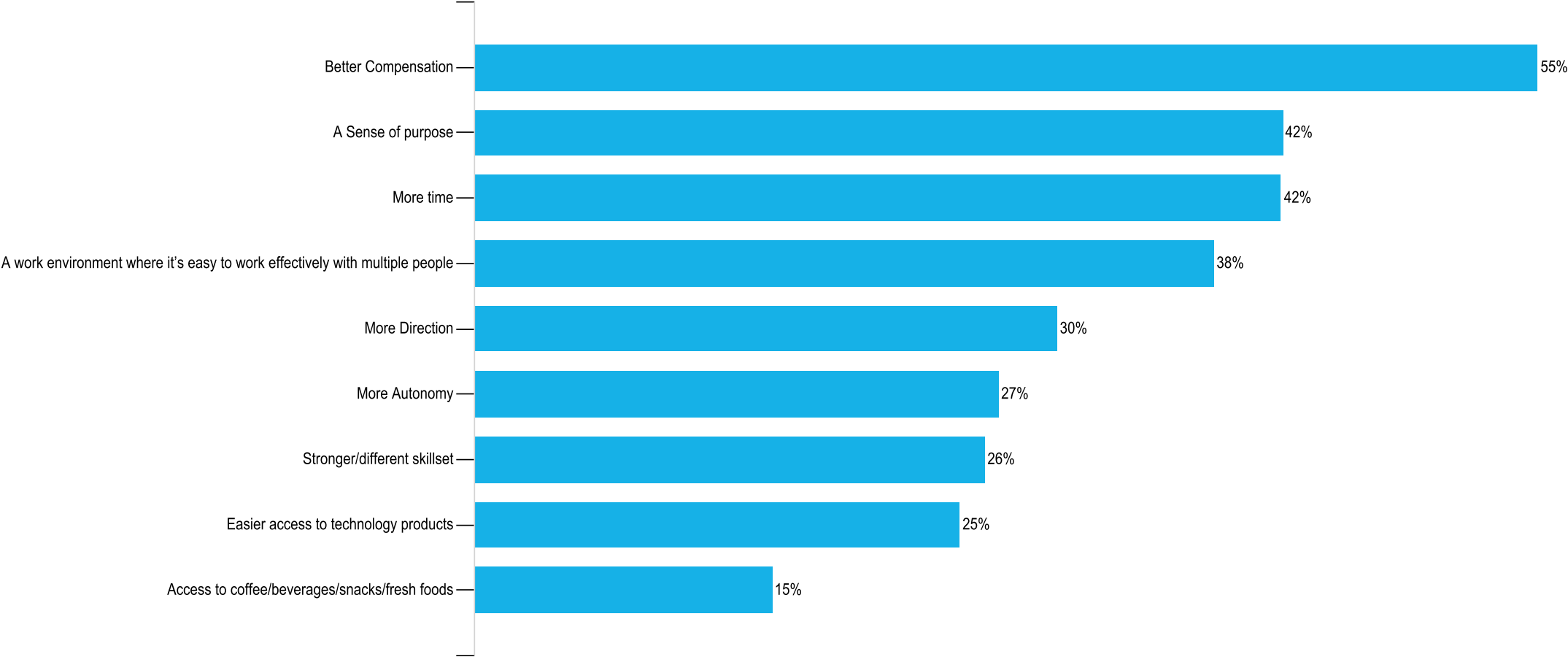
# Inspiration contributors

What is the biggest contributor to workplace inspiration?



# How people feel more inspired

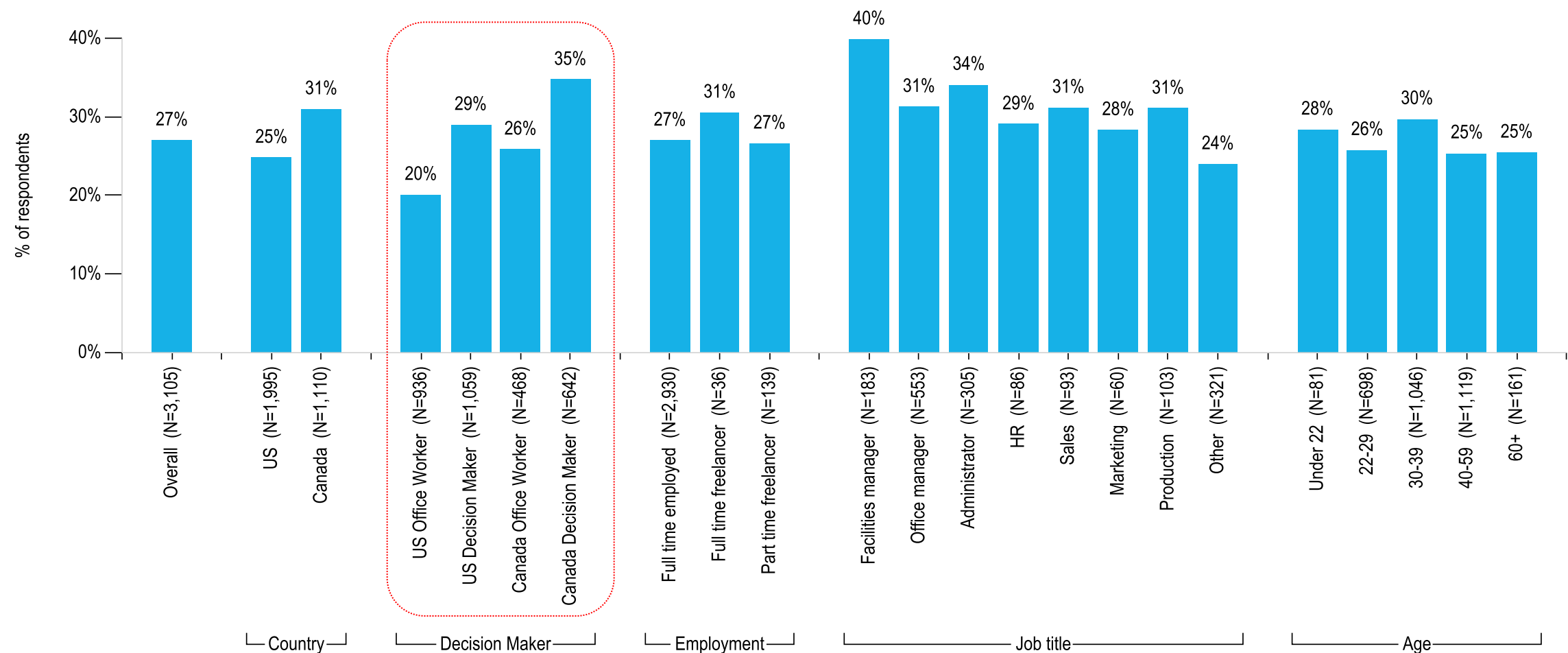
I would be more inspired at work if I had...



# Profile: More Autonomy

The decision makers in Canada would be more inspired by having more autonomy at work than their US colleagues.

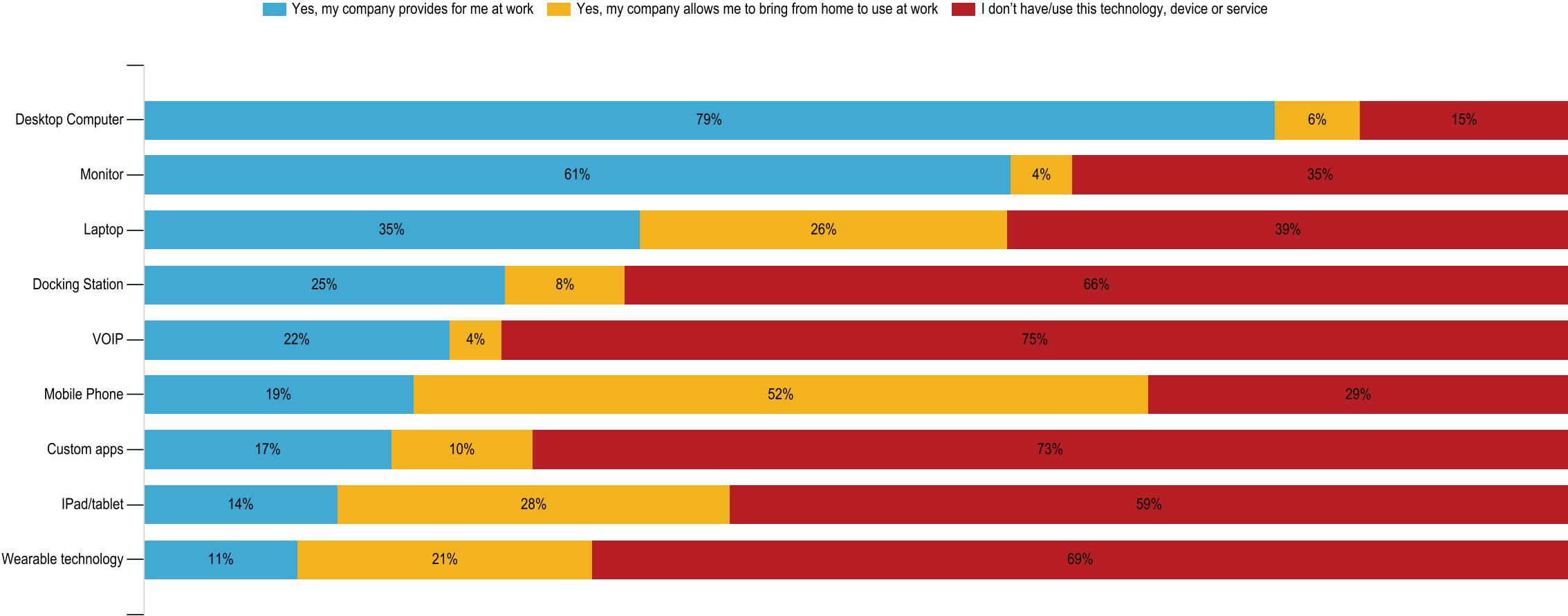
I would be more inspired at work if I had...



# *Workplace Innovation / Technology*

# Provided technology

For each type of technology, device or service listed below, please select the one response that best represents your situation.

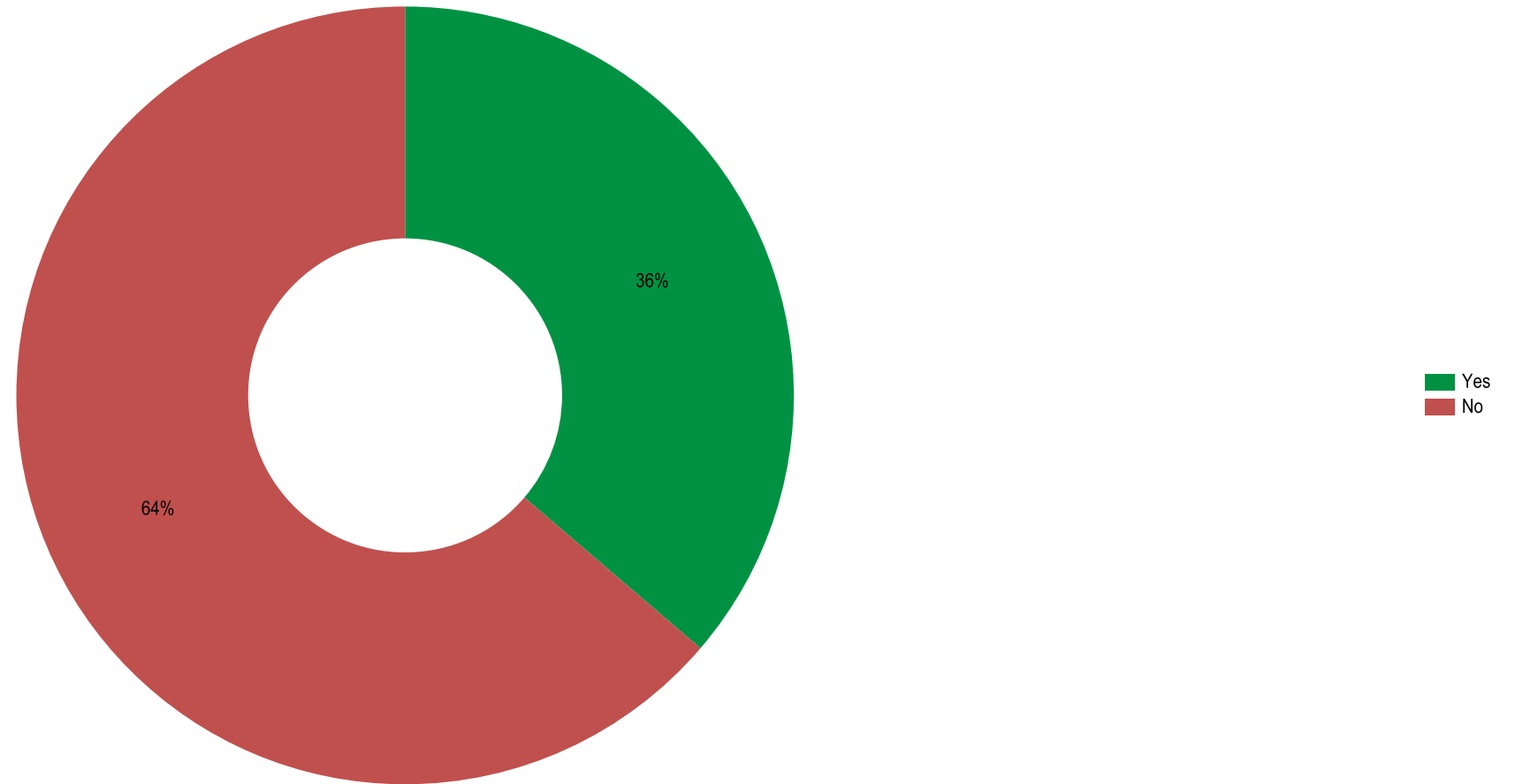




# Automated systems

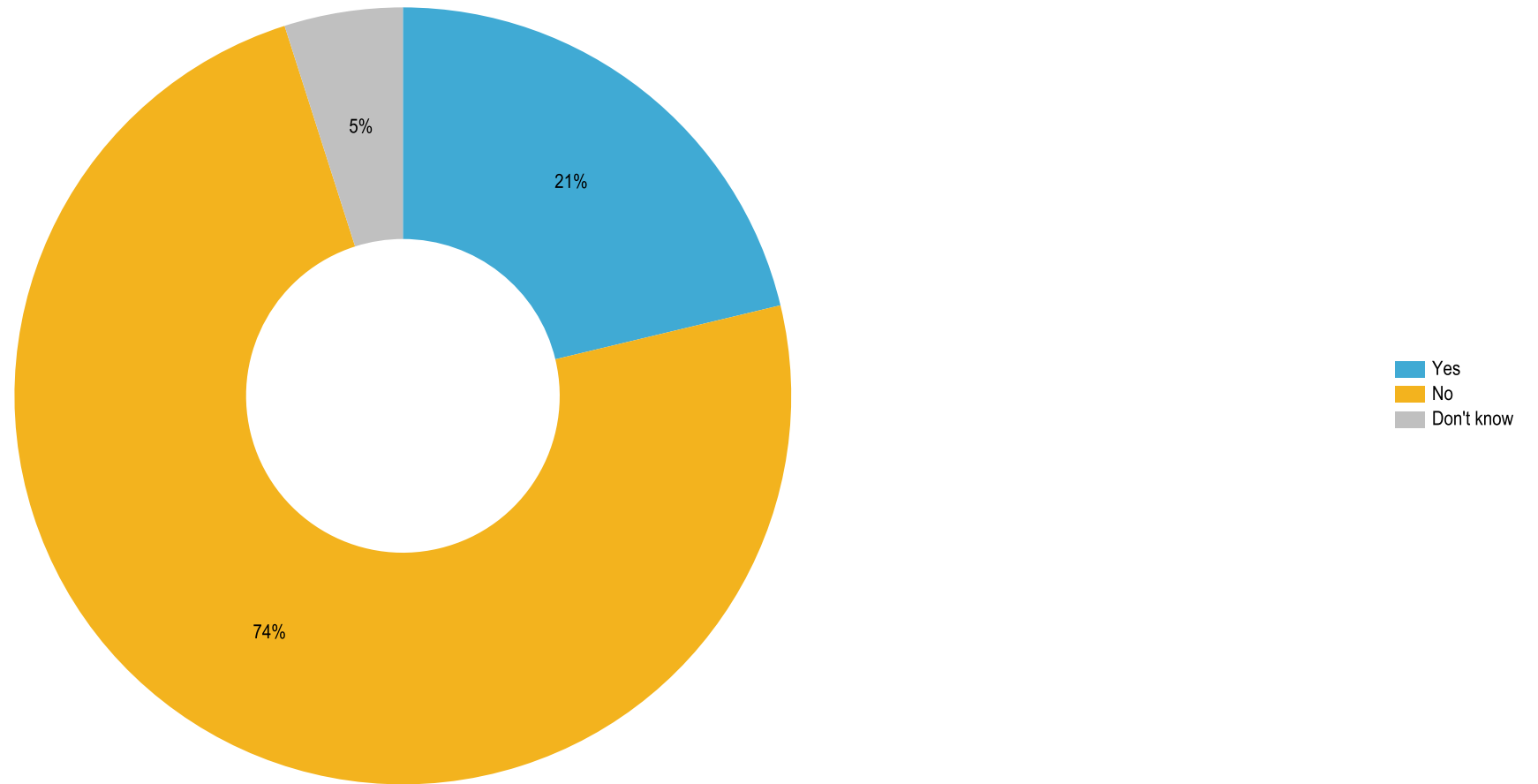
Do you currently use automated systems in your job?

Definition: A system of operating or controlling a process by highly automatic means, as by electronic devices, reducing human intervention to a minimum.



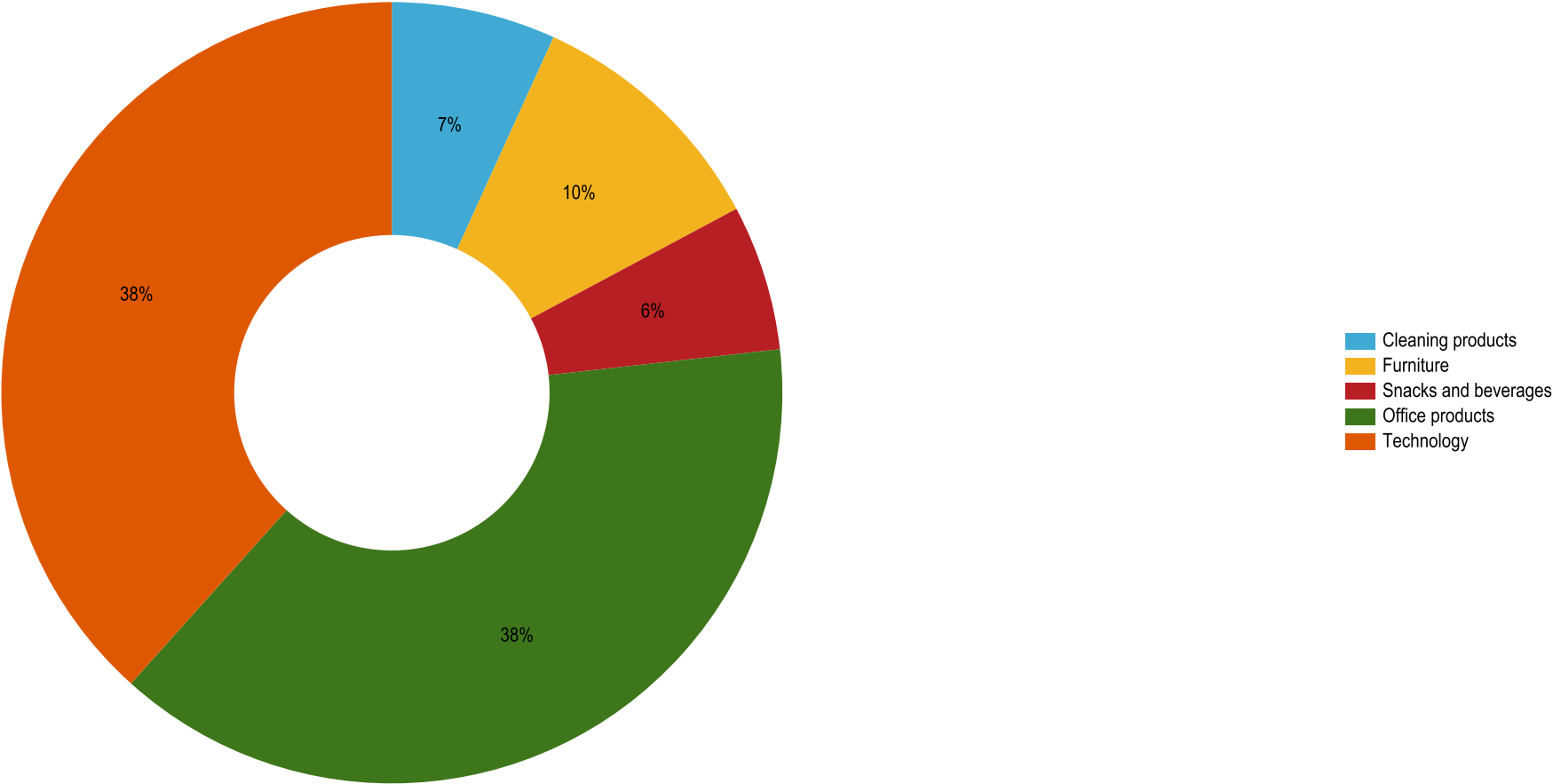
# Latest technology

Does your employer give you access to the latest technology (i.e. wearables, such as Fitbits, iWatch, etc.) to help you do your job more effectively and efficiently?



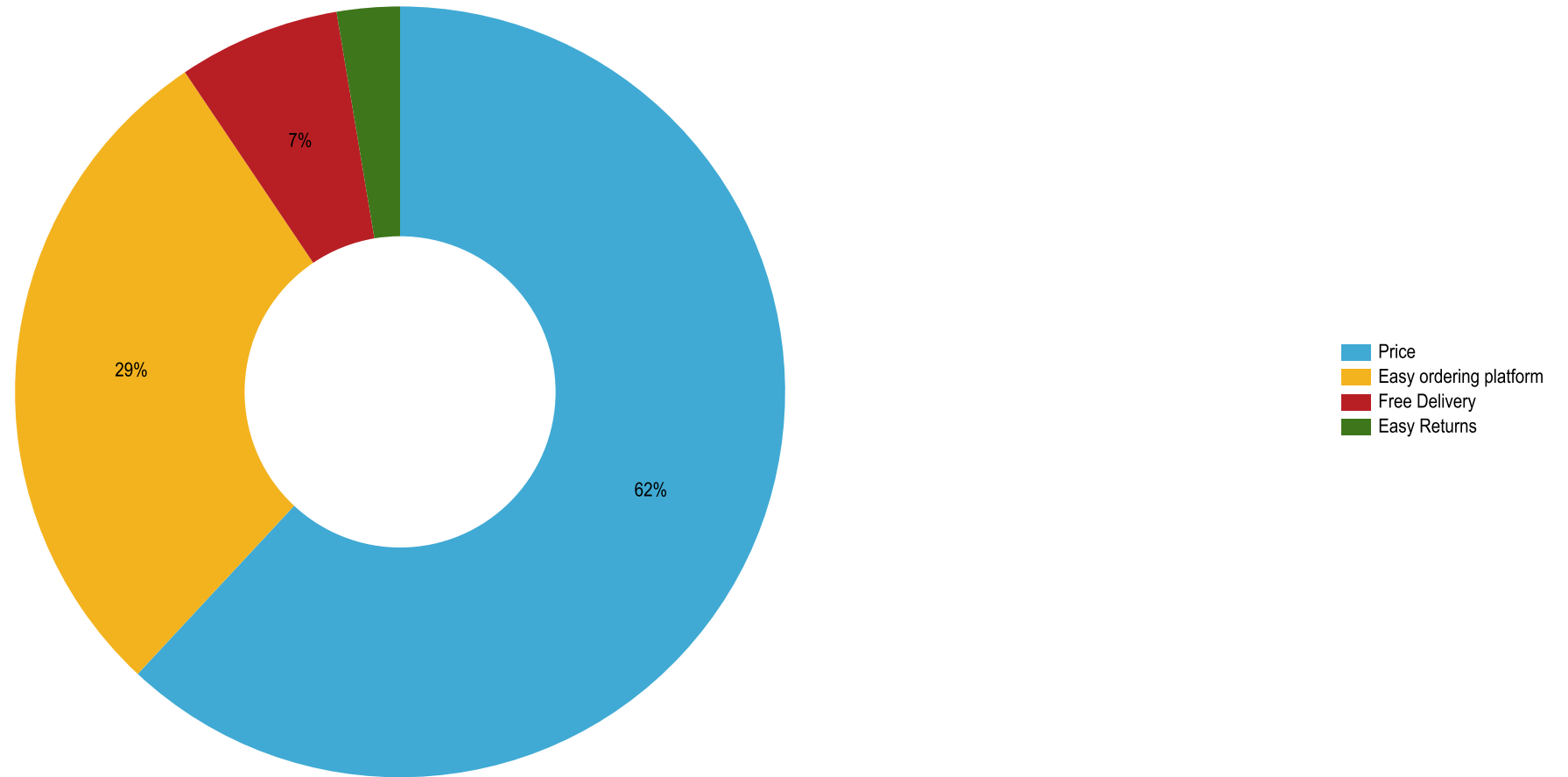
# The cost of office supplies

Where does your organization spend most money when it comes to necessities for the office?



# Factors considered when buying products

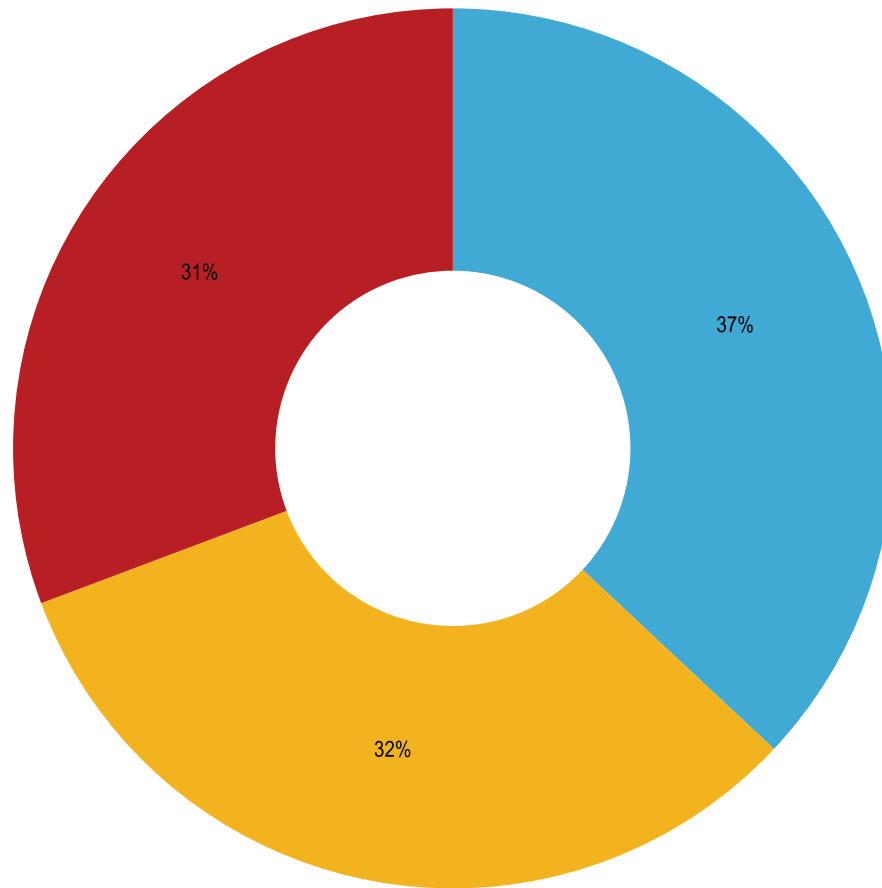
What is the most important factor for you when buying office products?



# *Office Design – Personalisation*

# Office layout

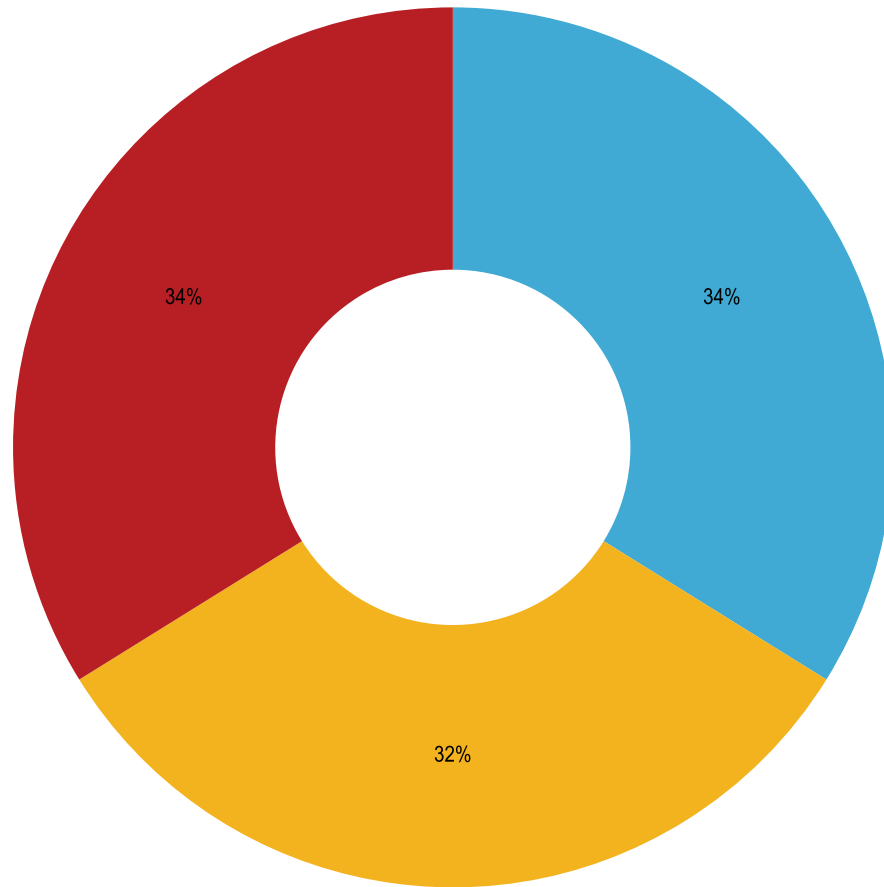
Do you work in an open, closed or hybrid office environment?



- Open - a floor plan without fully enclosed spaces for distinct rooms
- Closed - an office floor plan consisting of fully enclosed office spaces or cubicles
- Hybrid - an office floor plan with consisting of fully enclosed office spaces or cubicles as well as open...

# Preferable office layout

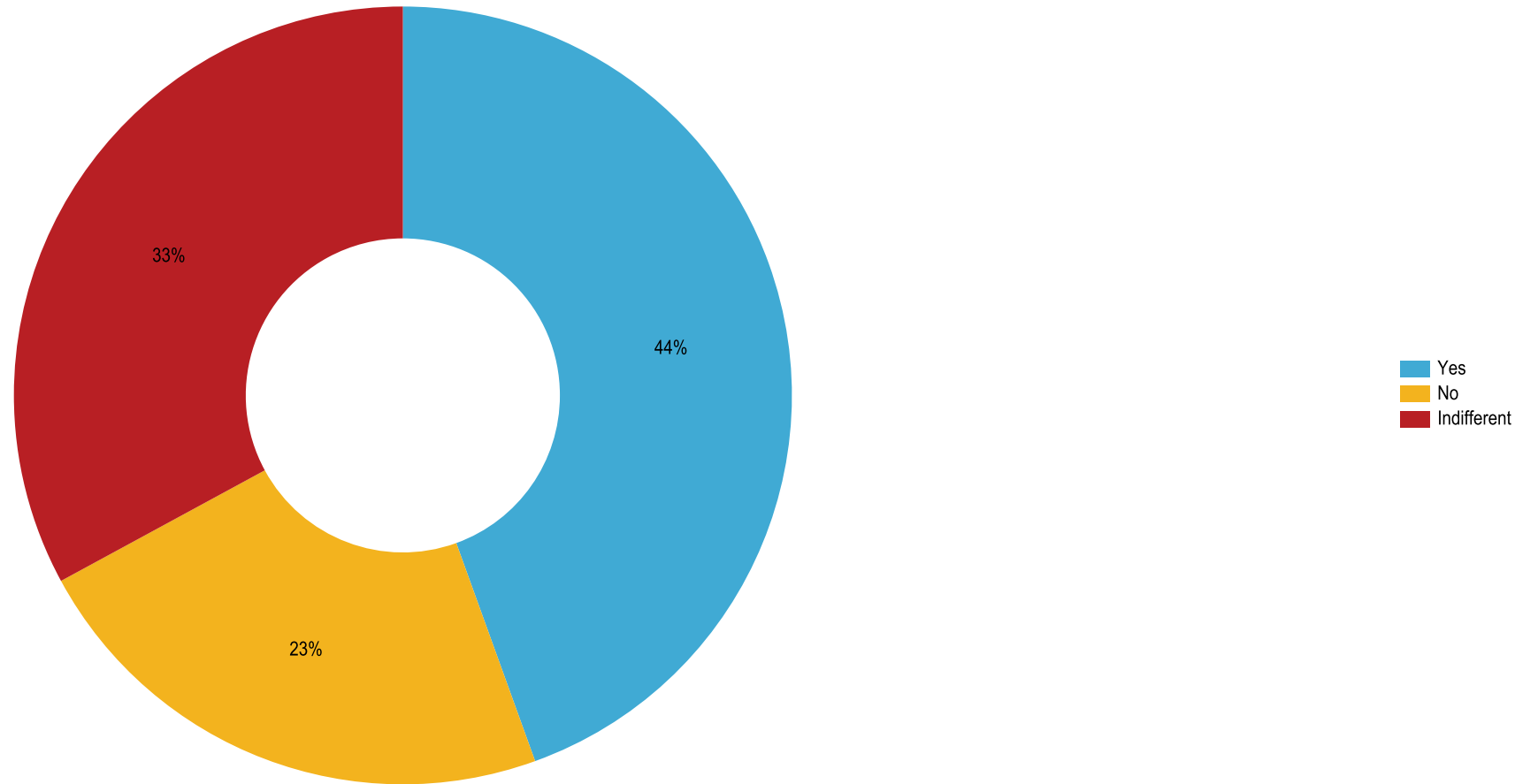
Which do you prefer?



- Open - a floor plan without fully enclosed spaces for distinct rooms
- Closed - an office floor plan consisting of fully enclosed office spaces or cubicles
- Hybrid - an office floor plan with consisting of fully enclosed office spaces or cubicles as well as open...

# Attention to design

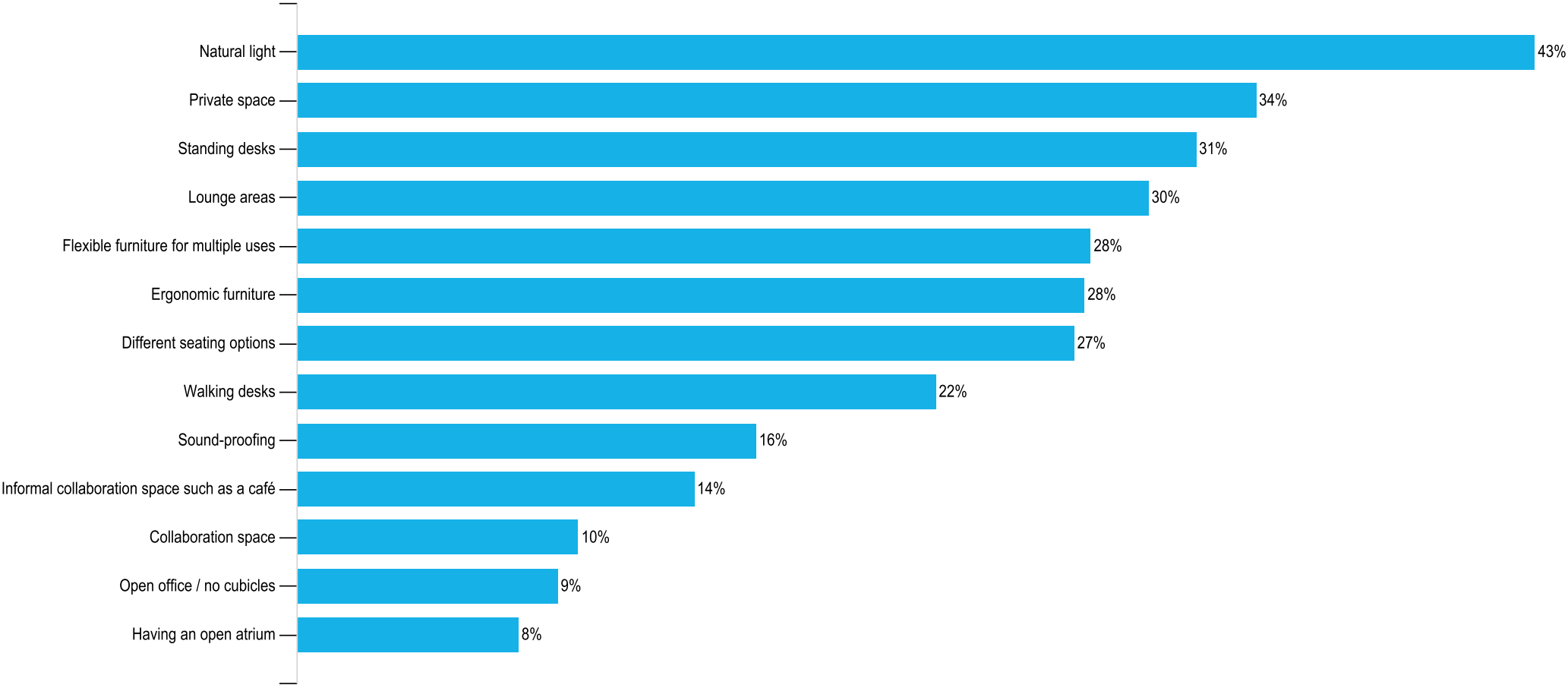
Would you like to see more attention paid to office design in your workplace?





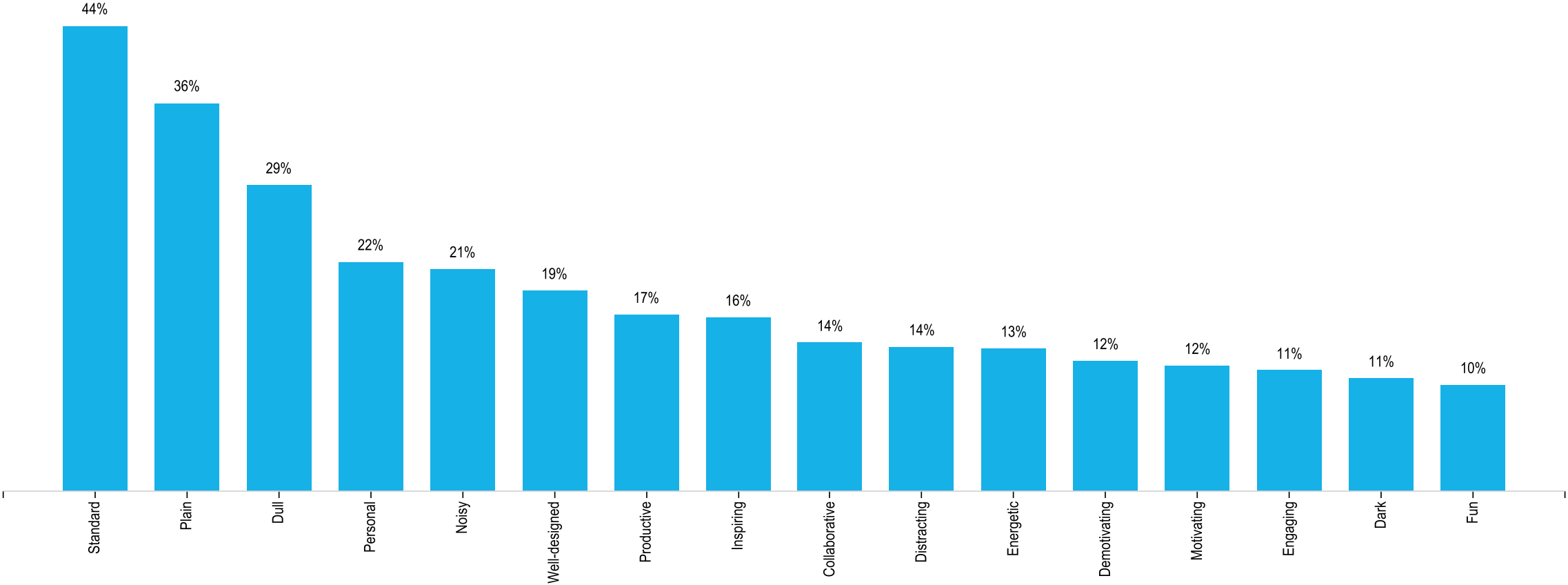
# Interest in the office features

What features would interest you?



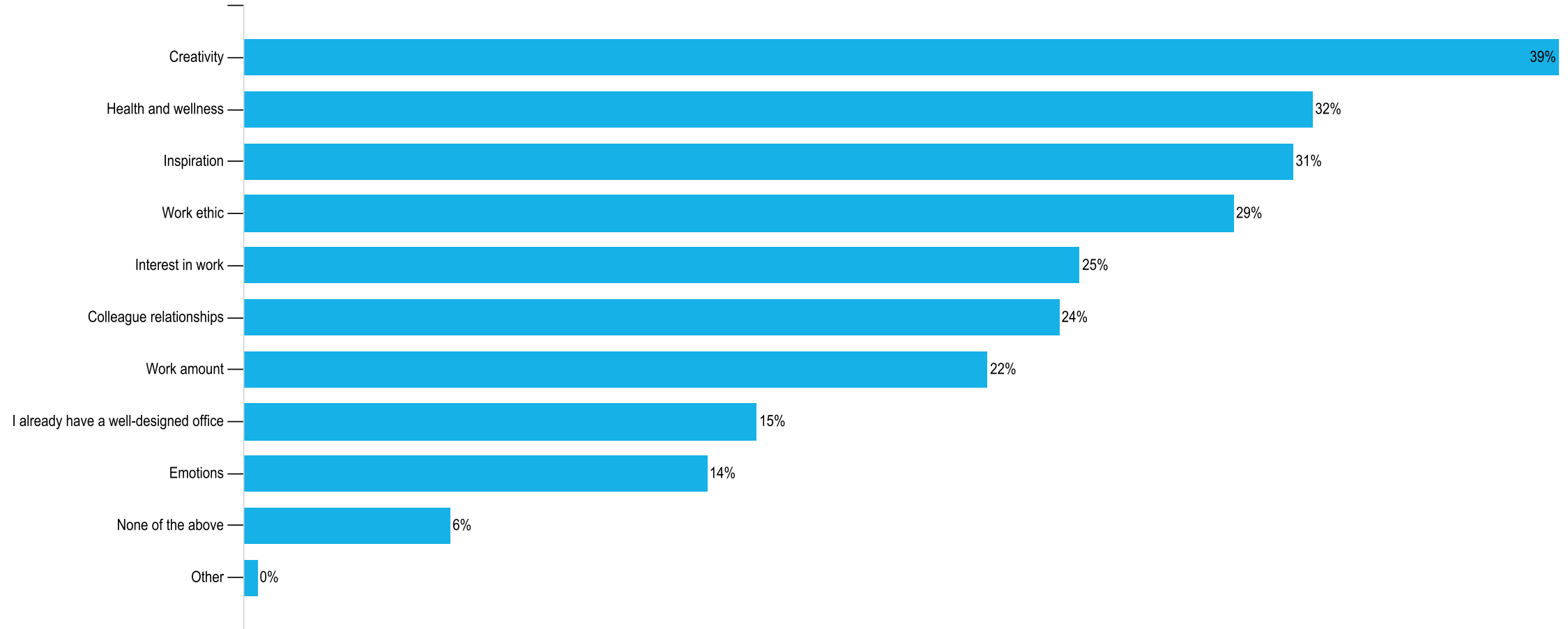
# Describing the office

How would you describe your office?



# A number of different styles of working locations

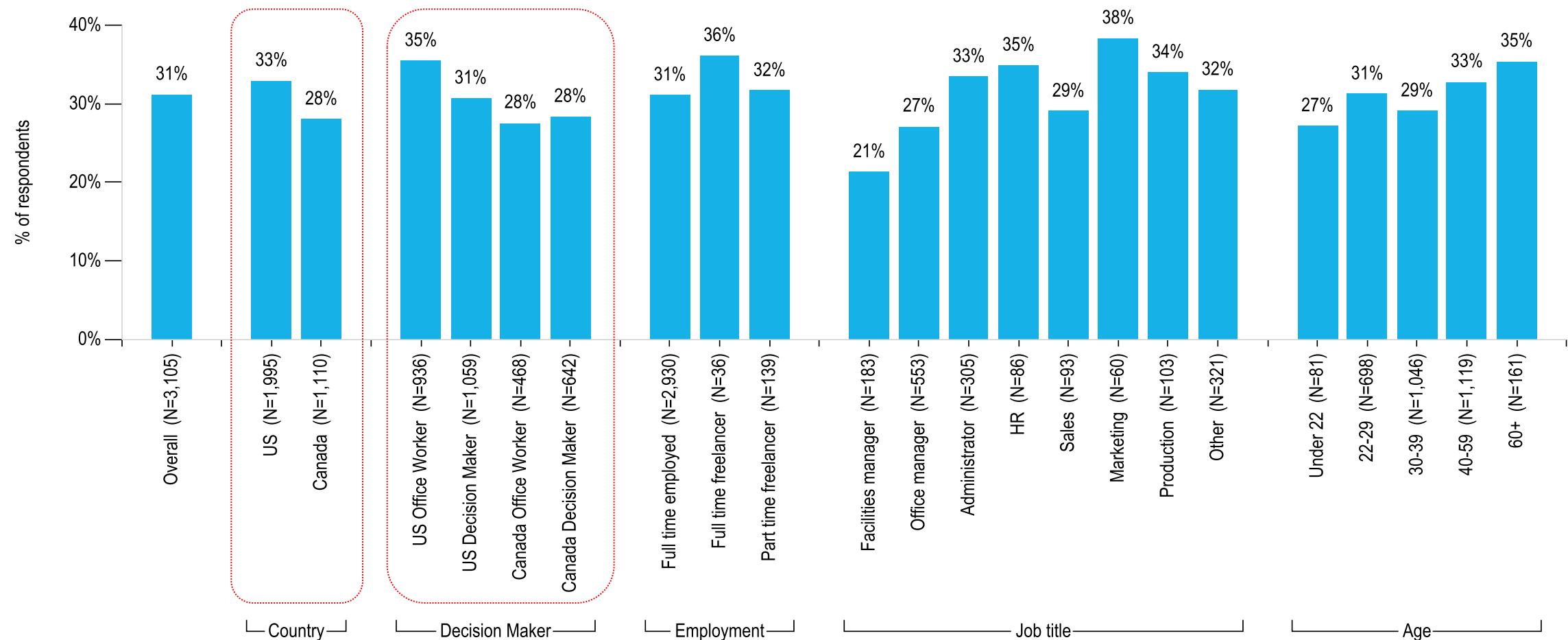
If you were able to choose a number of different styles of working location, how would it make you feel?.



# Profile: Inspiration

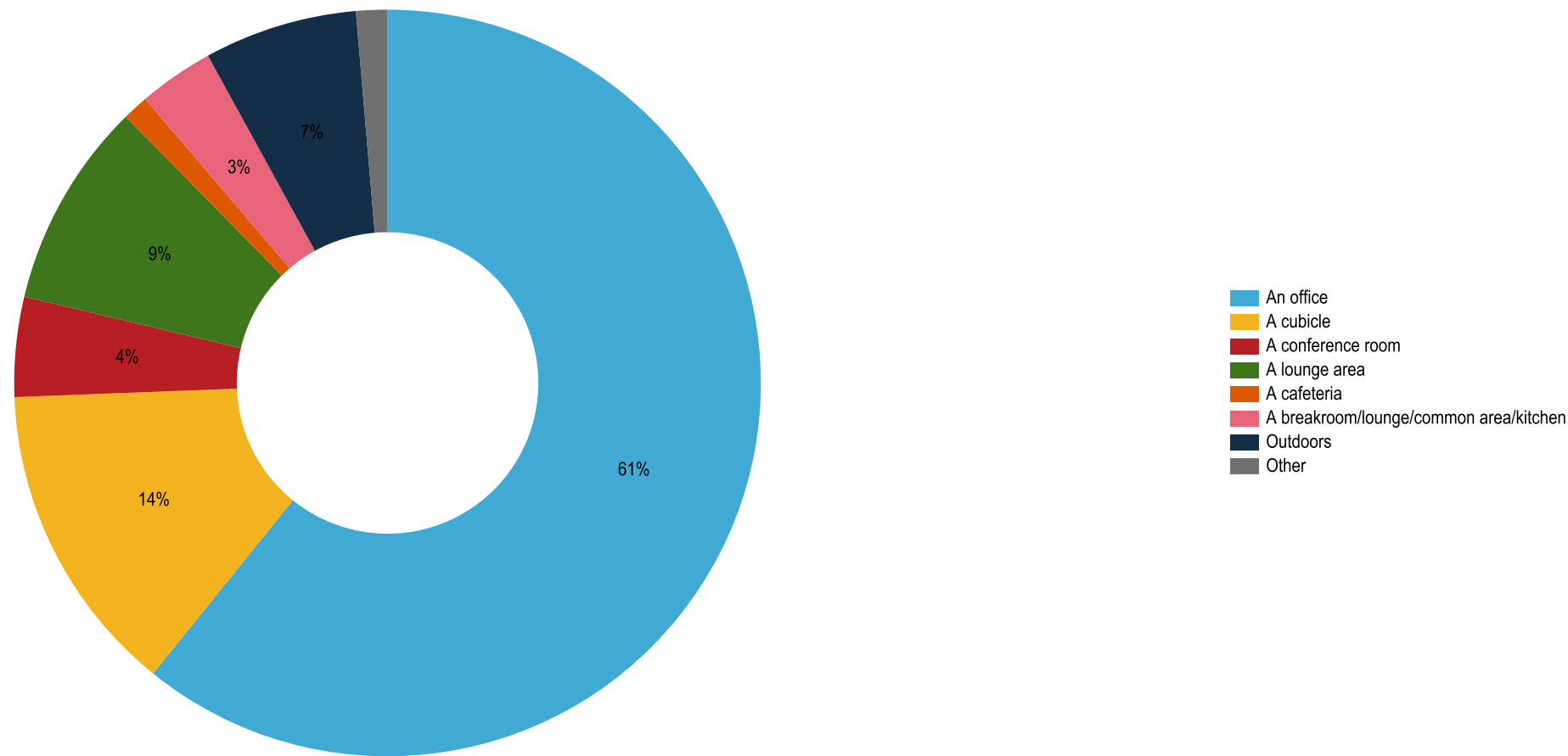
Different styles of working location would make US workers more inspired than their Canadian colleagues.

If you were able to choose a number of different styles of working location, how would it make you feel?.



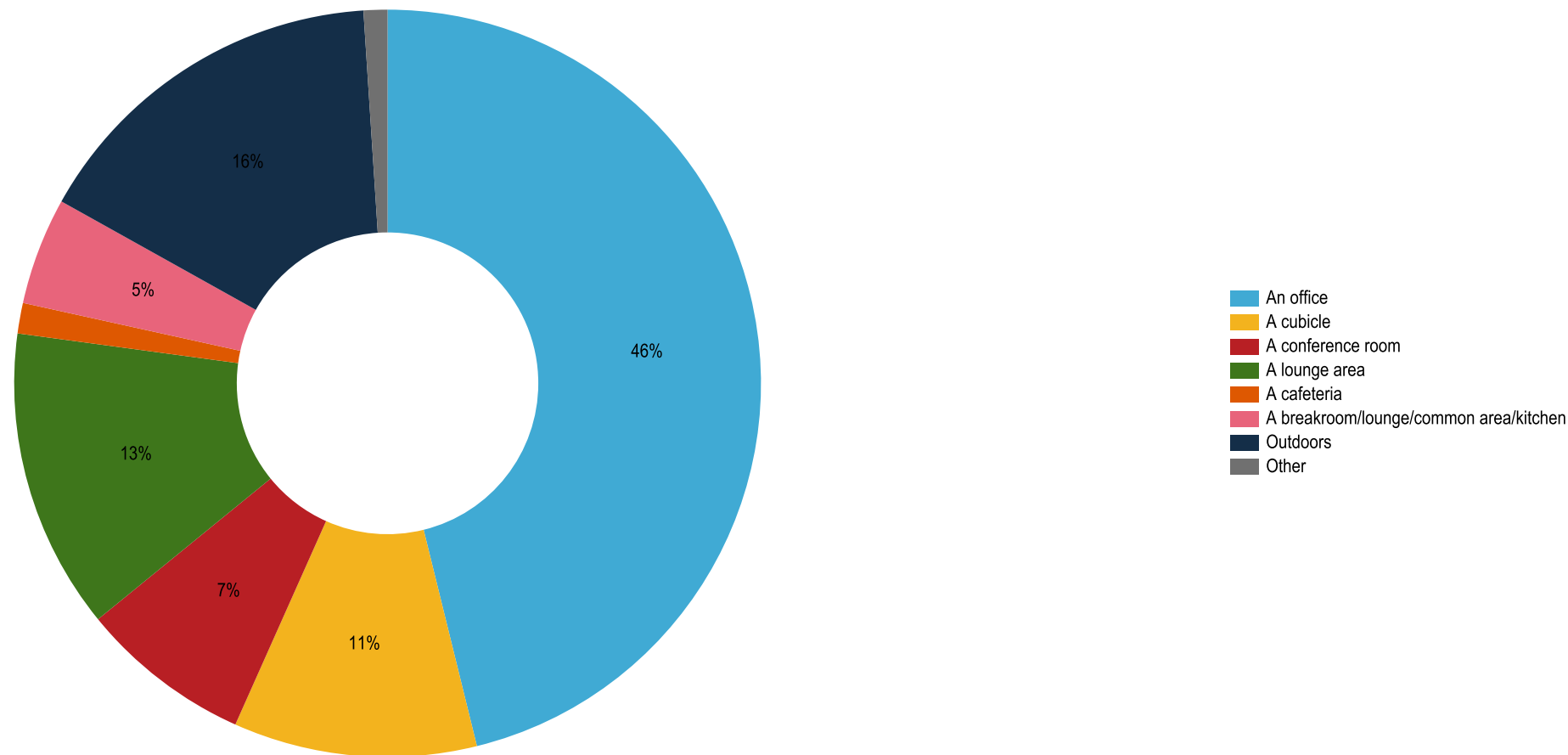
# Productive spaces

What type of space enables you to be more productive?



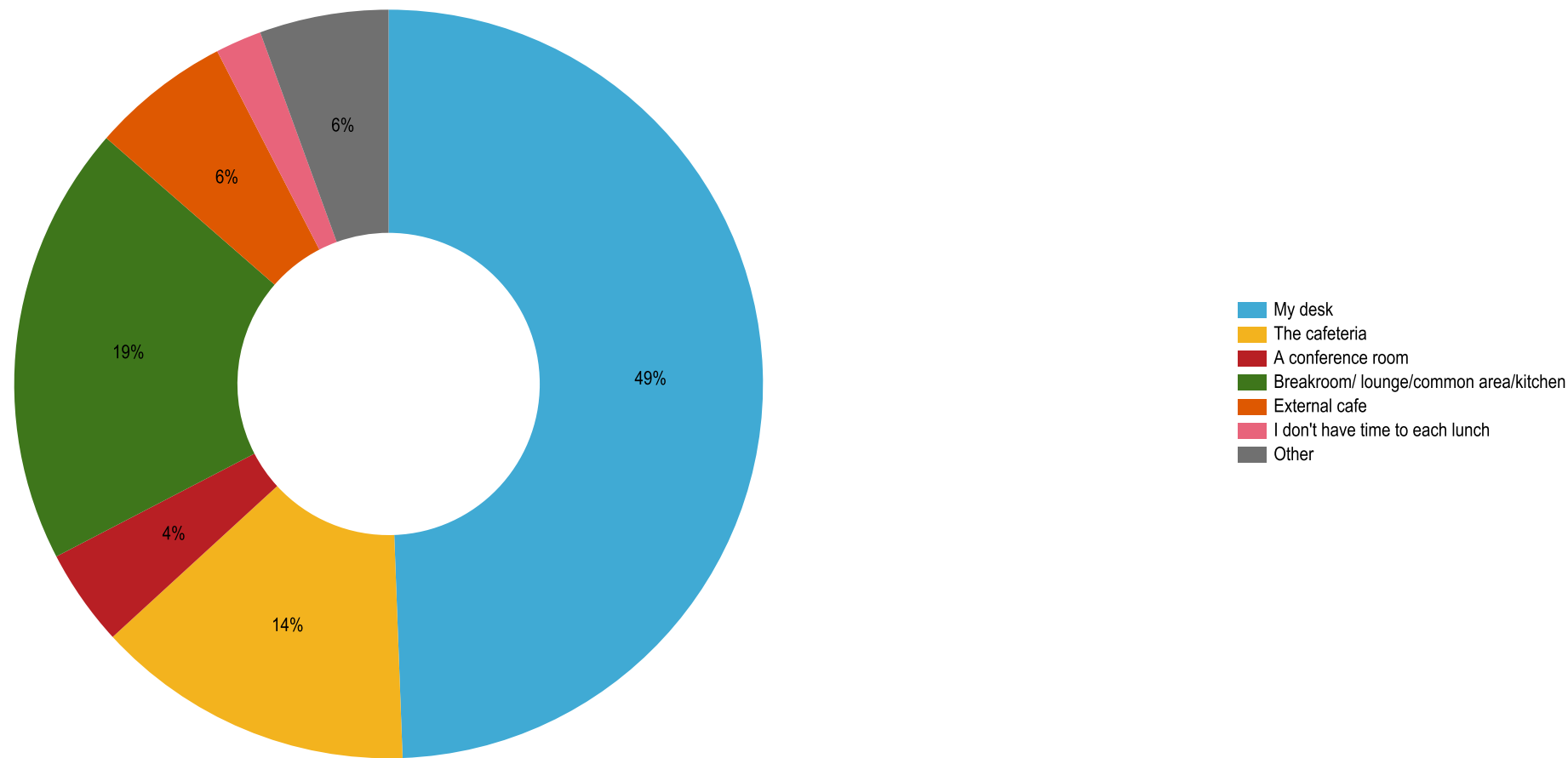
# Inspiring spaces

What type of space inspires you to be more creative and innovative?



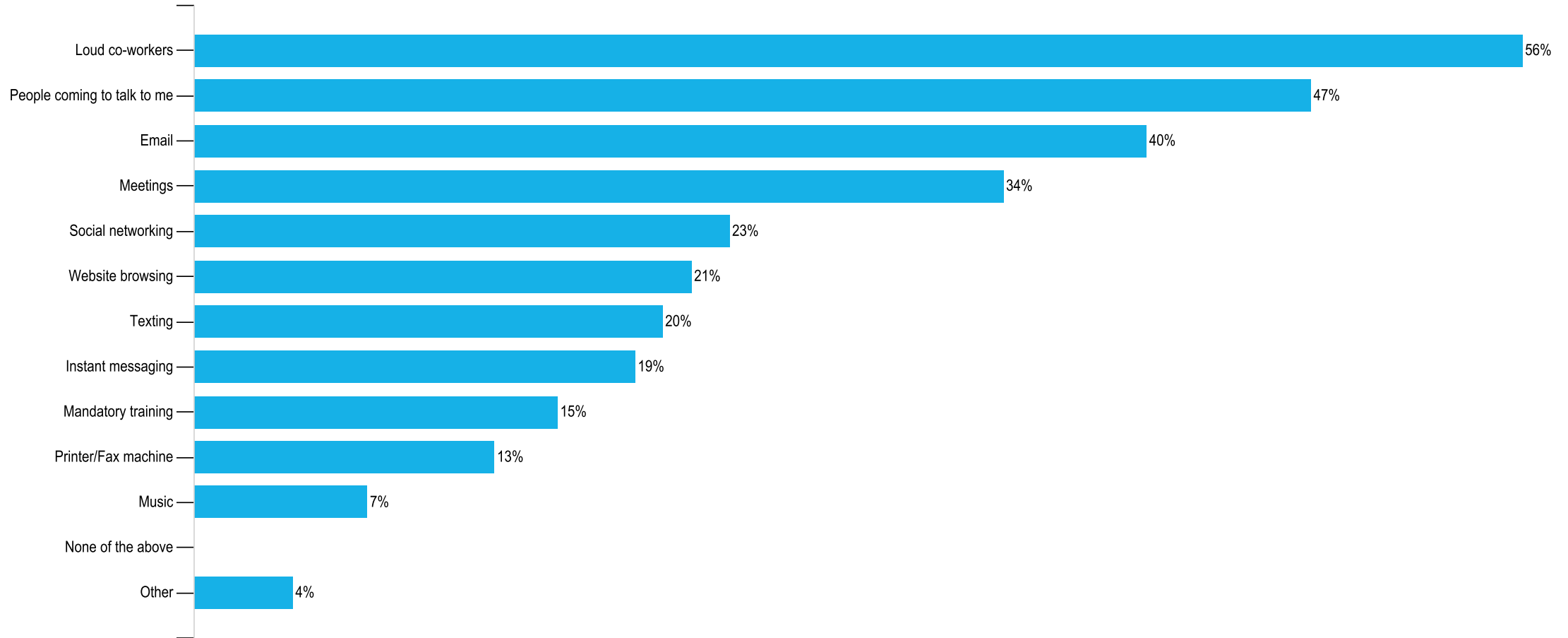
# Eating lunch

Where are you spending more time eating lunch?



# Distractions

What distractions get in the way of you doing your best work?

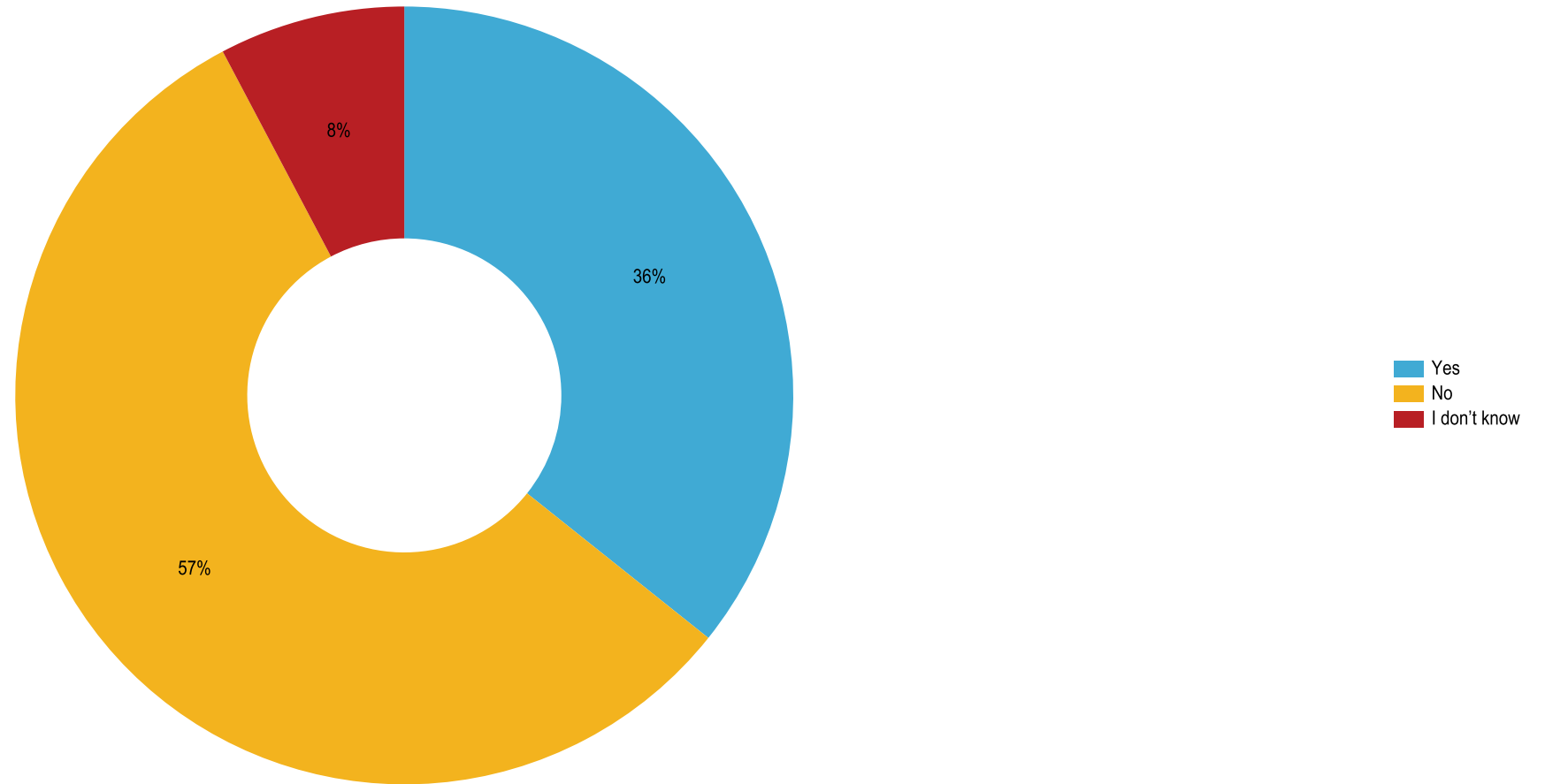




*Wellness*

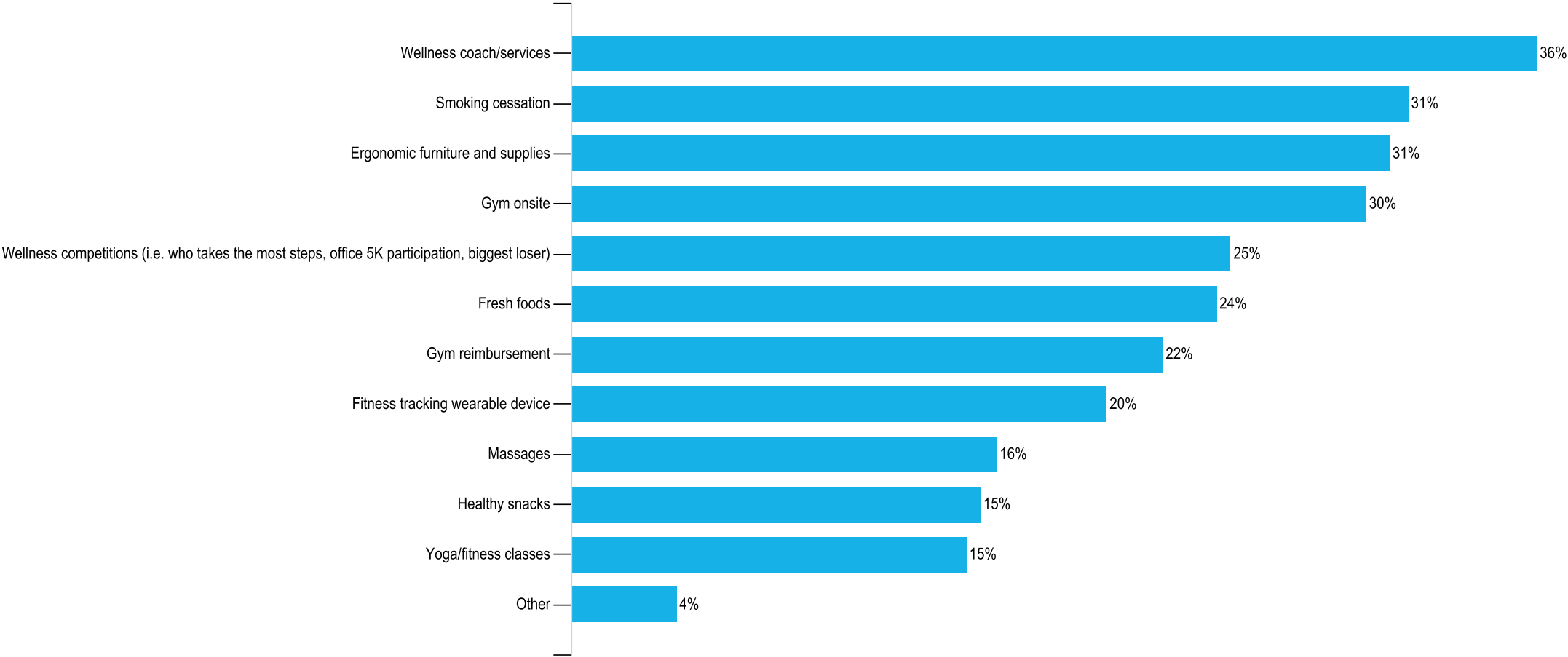
# Wellness programme

Does your workplace offer a wellness program?



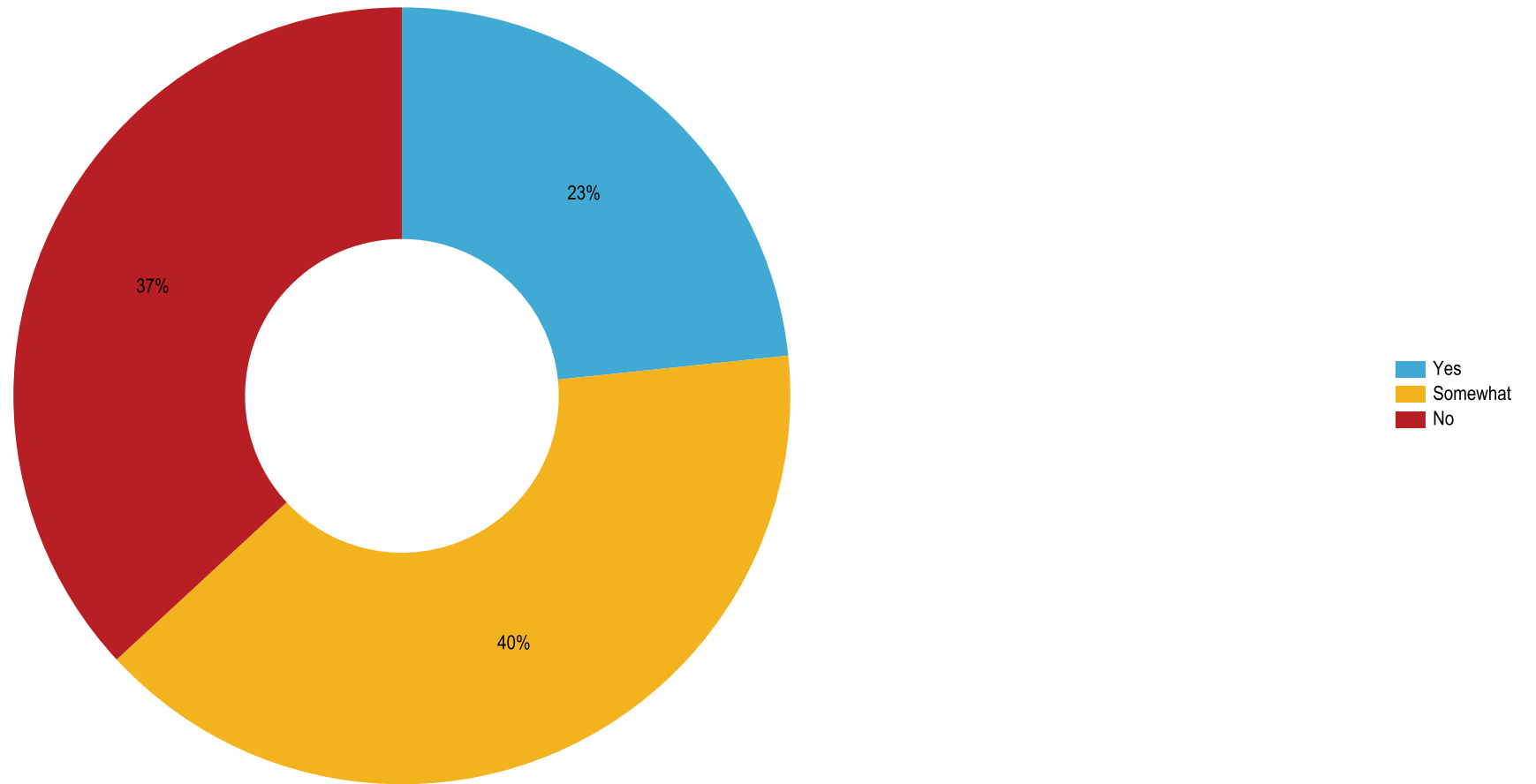
# Features of a wellness program

What is included in the wellness program?



# Wellness program as a selling point

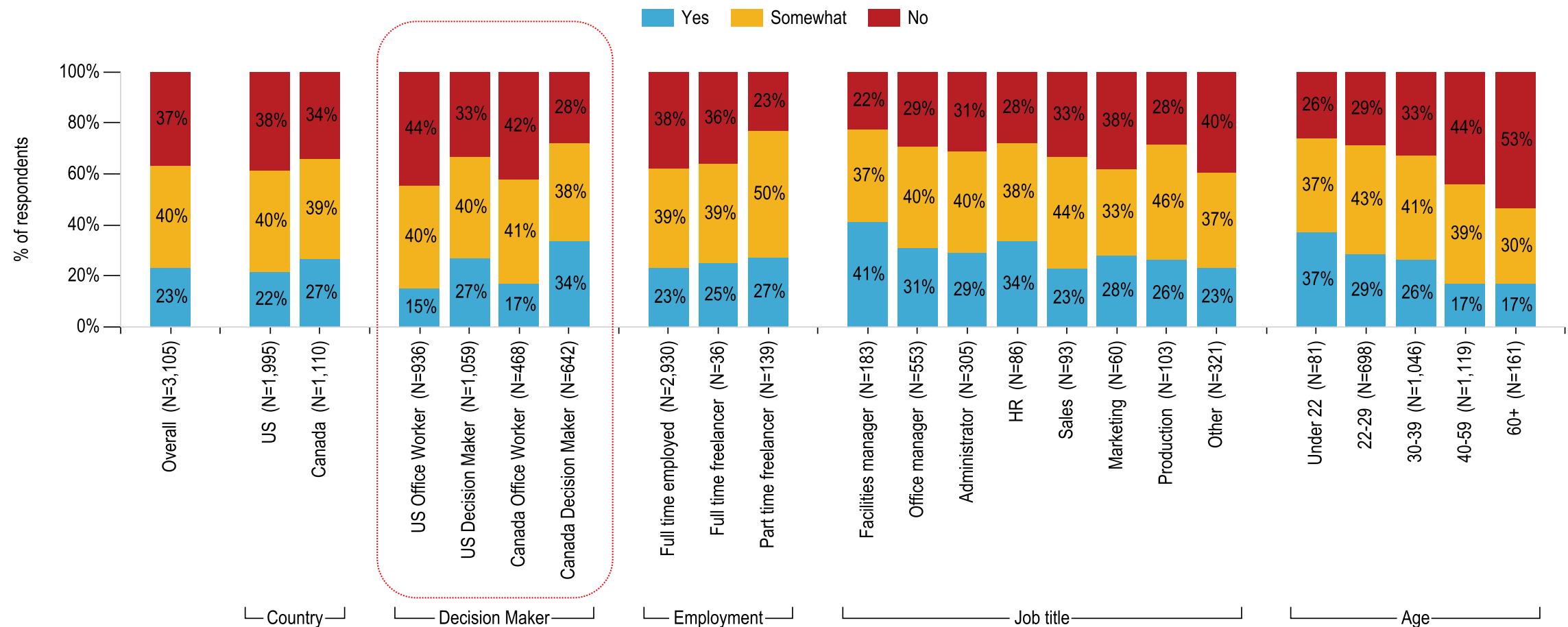
Is the availability of a wellness program a selling point if you were to look for a new job?



# Profile: Wellness program as a selling point

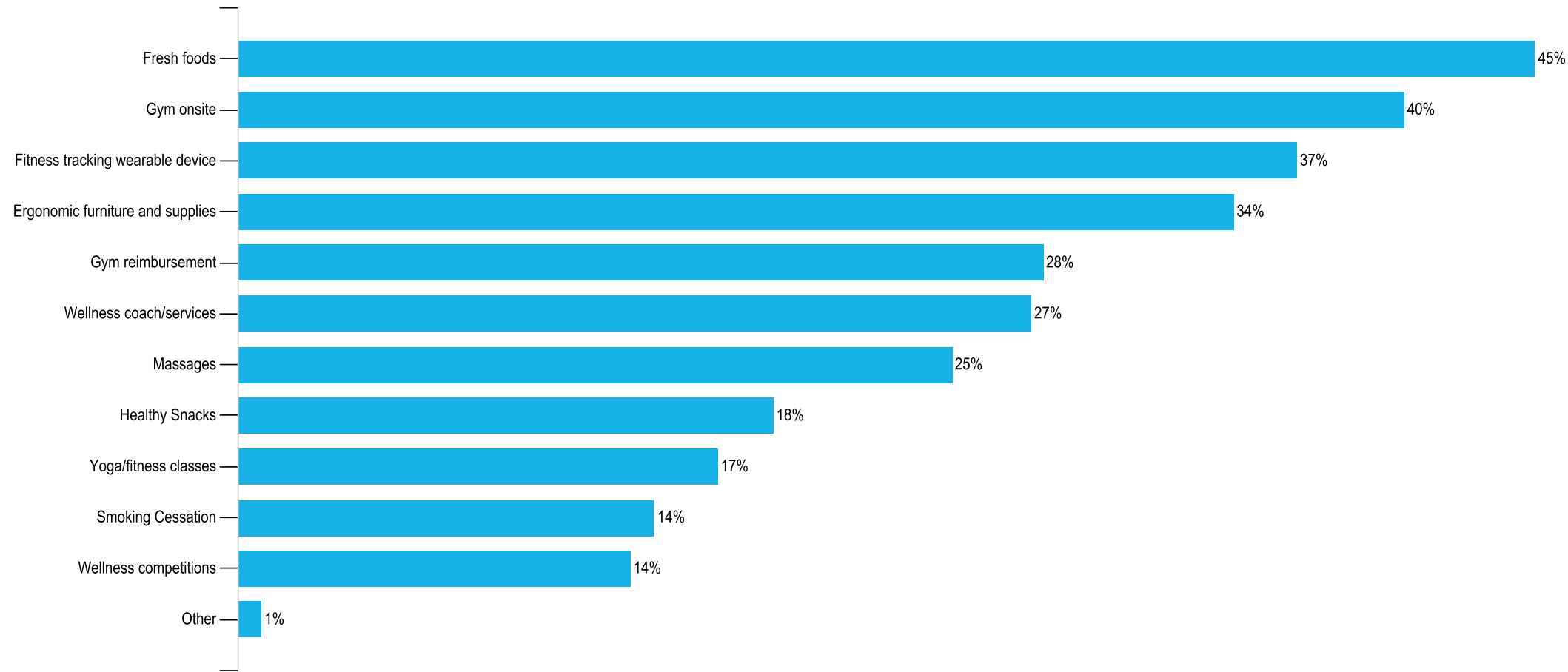
Wellness program appears to be a stronger selling point for Canadian decision makers.

Is the availability of a wellness program a selling point if you were to look for a new job?



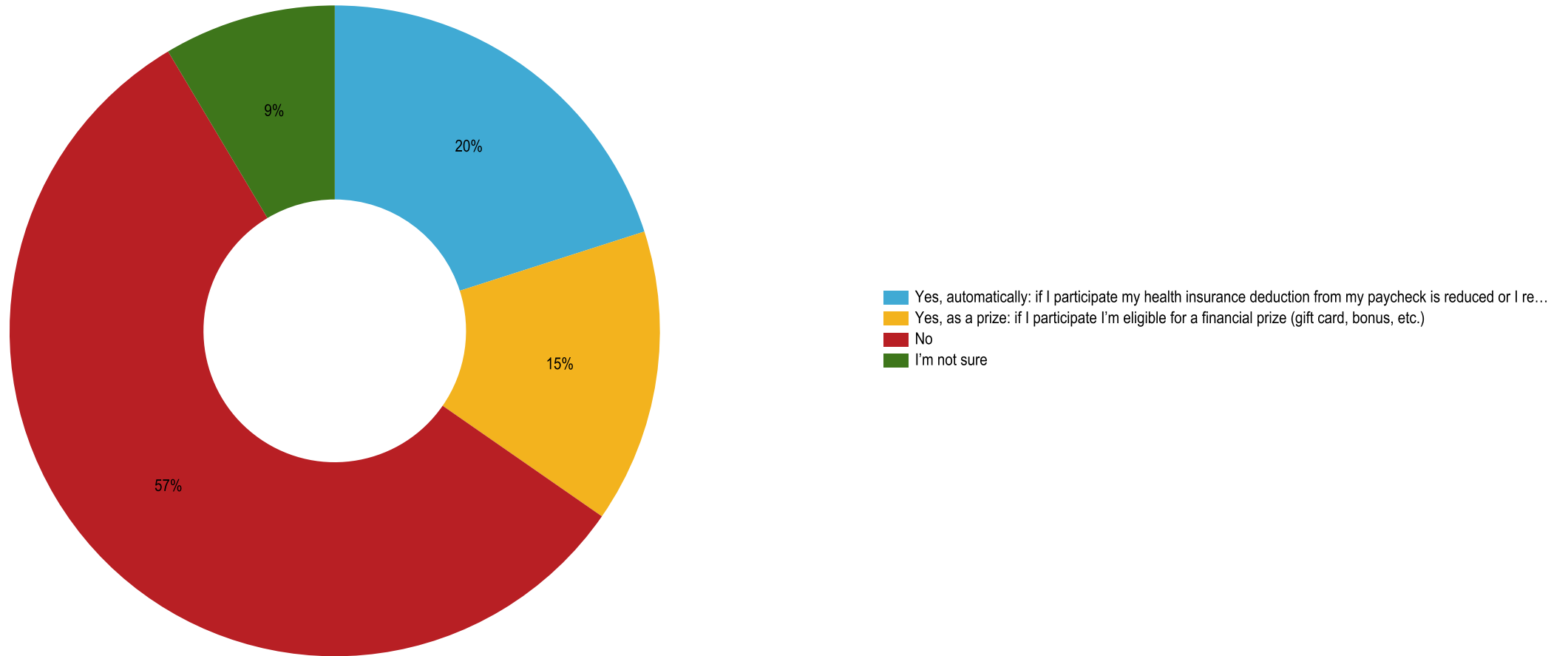
# What people want from a wellness program

What do you look for in a wellness program?



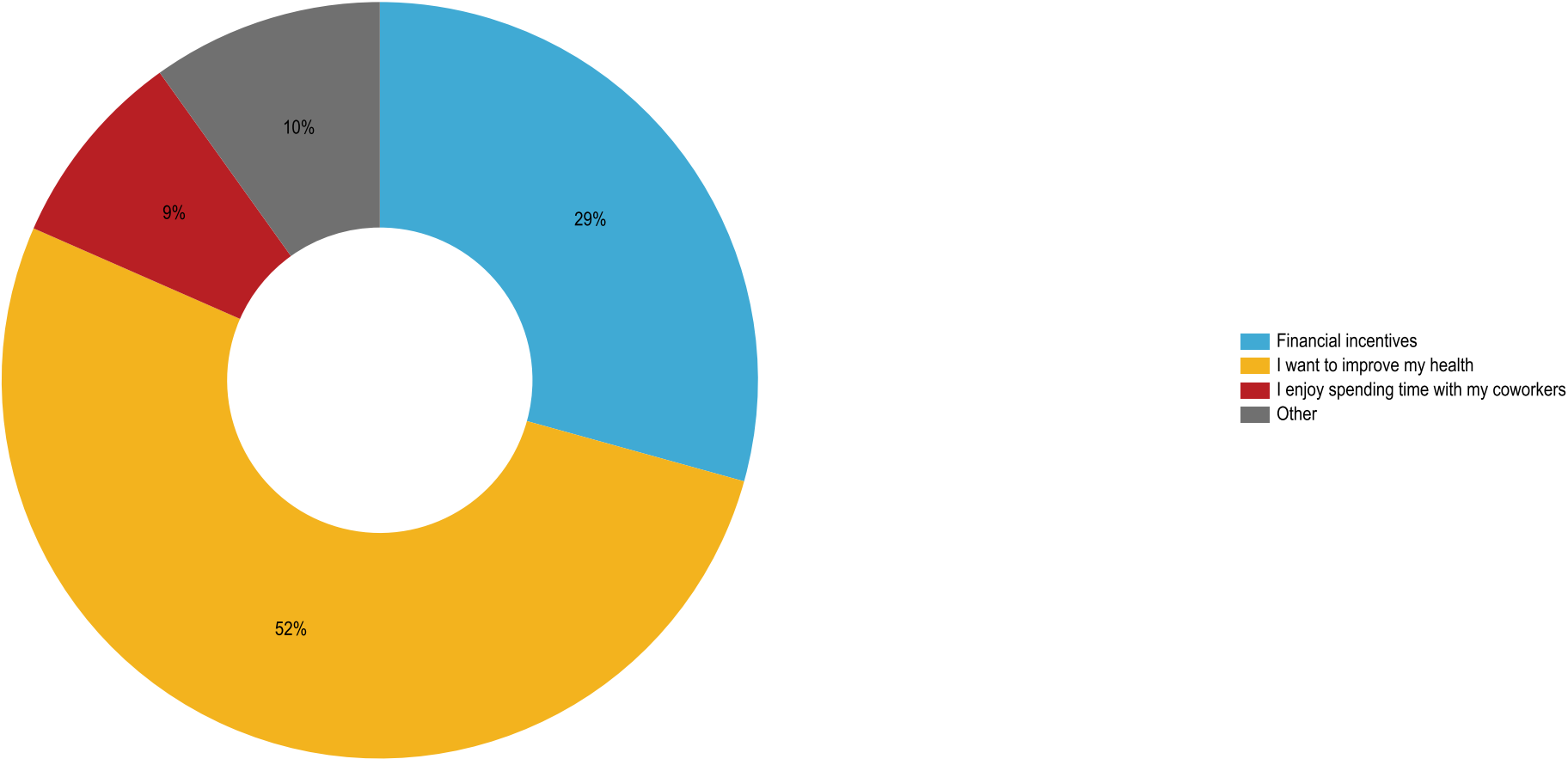
# Financial incentives in the wellness program

Does your employer offer financial incentives to motivate you to participate in a wellness program?



# Motivations for participating in the wellness program

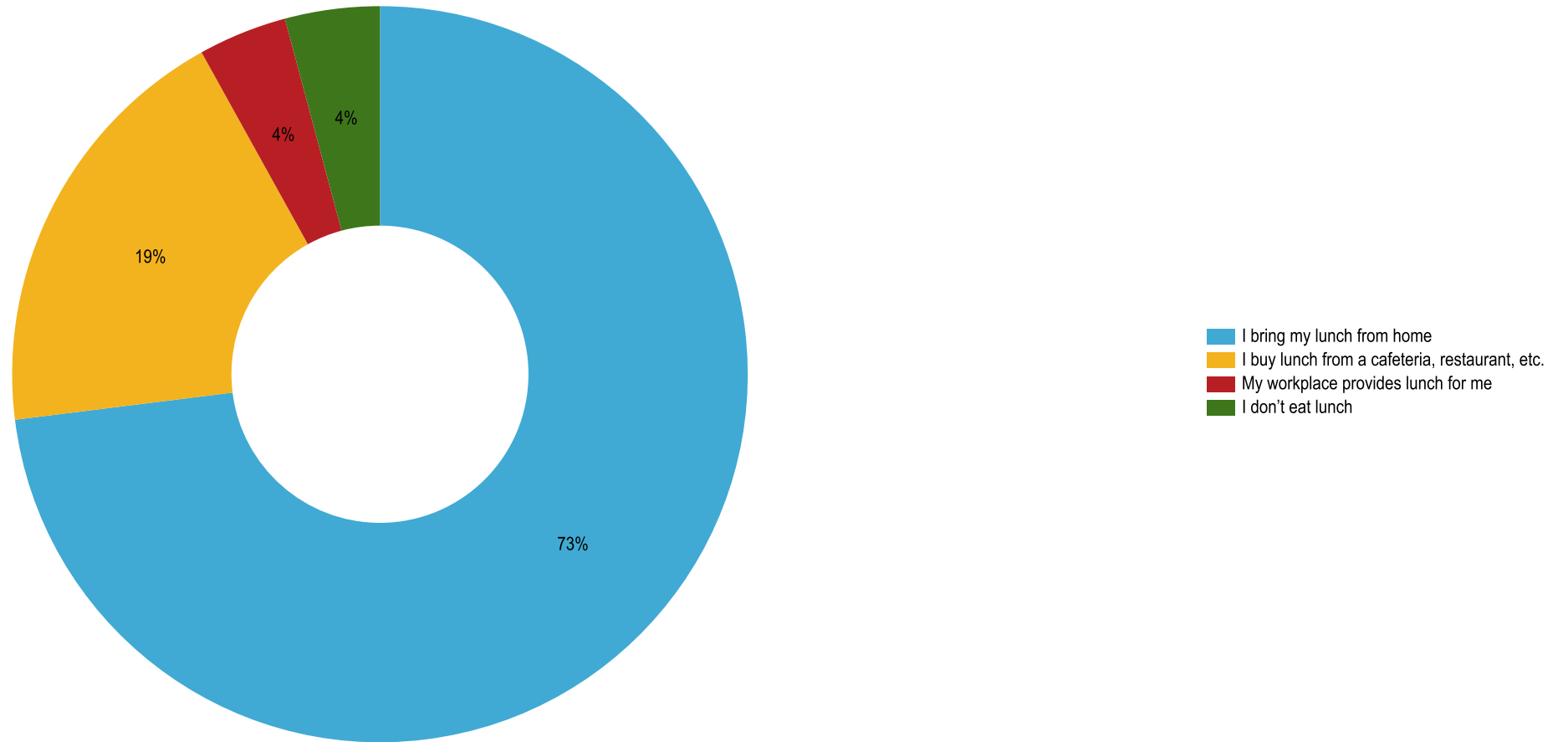
What motivates you to participate in your workplace's wellness program offerings?





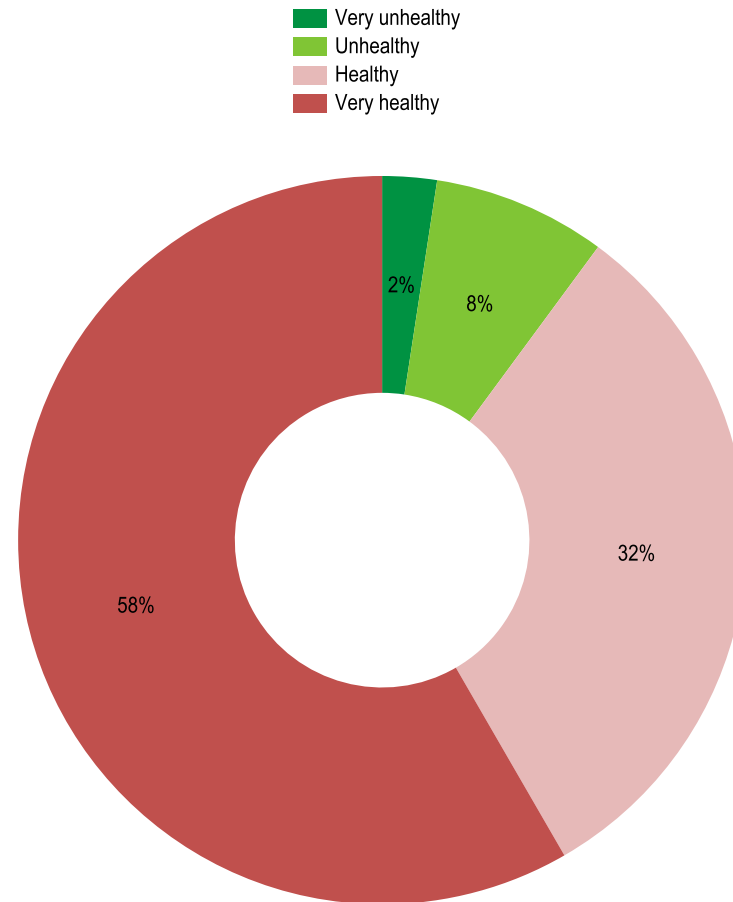
# Lunch arrangements

What do you do for lunch most often?



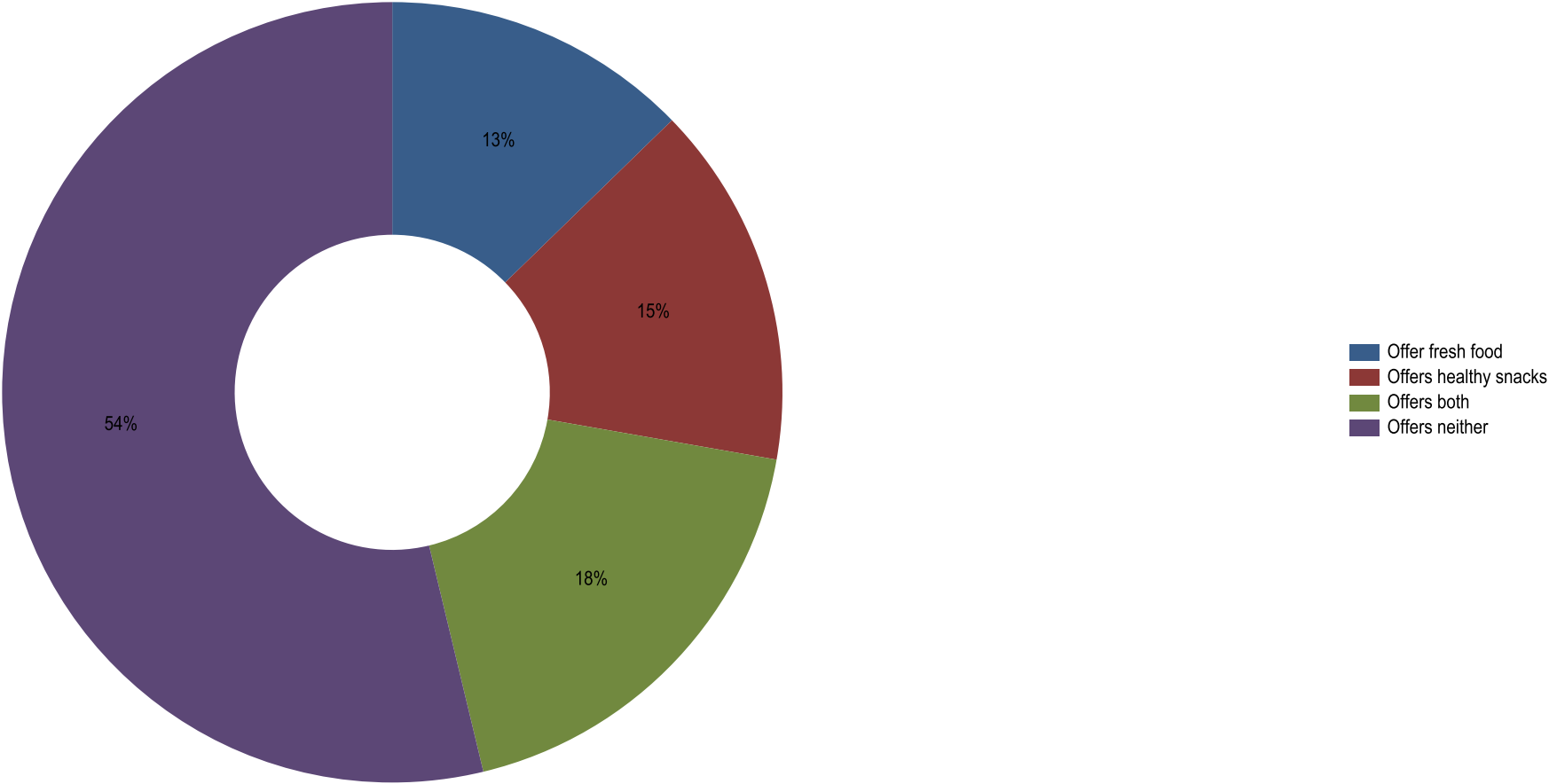
# Healthiness

How would you rank the healthiness of your typical lunch choices?



# Offering fresh food & healthy snacks

Does your company currently offer fresh food or healthy snacks?



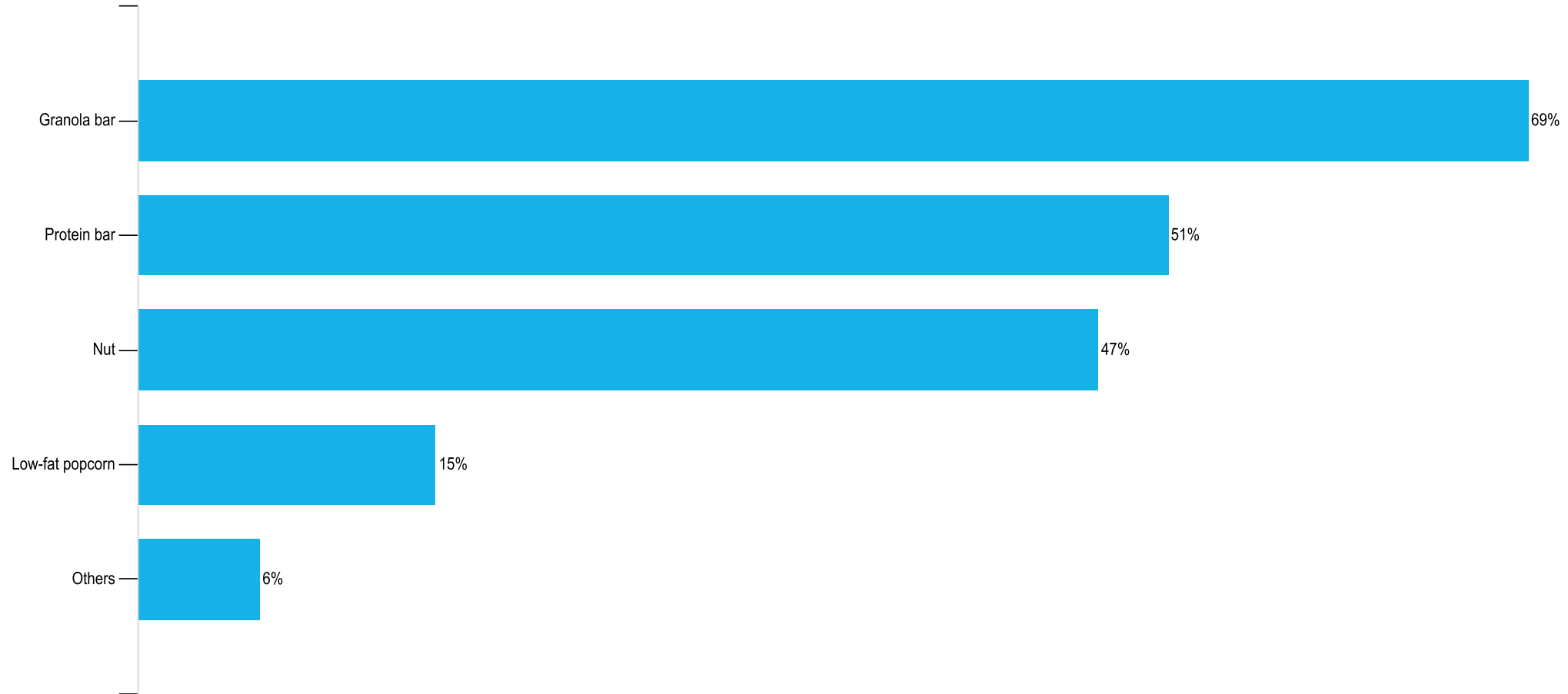
# Fresh foods that are offered

What fresh foods do they offer?



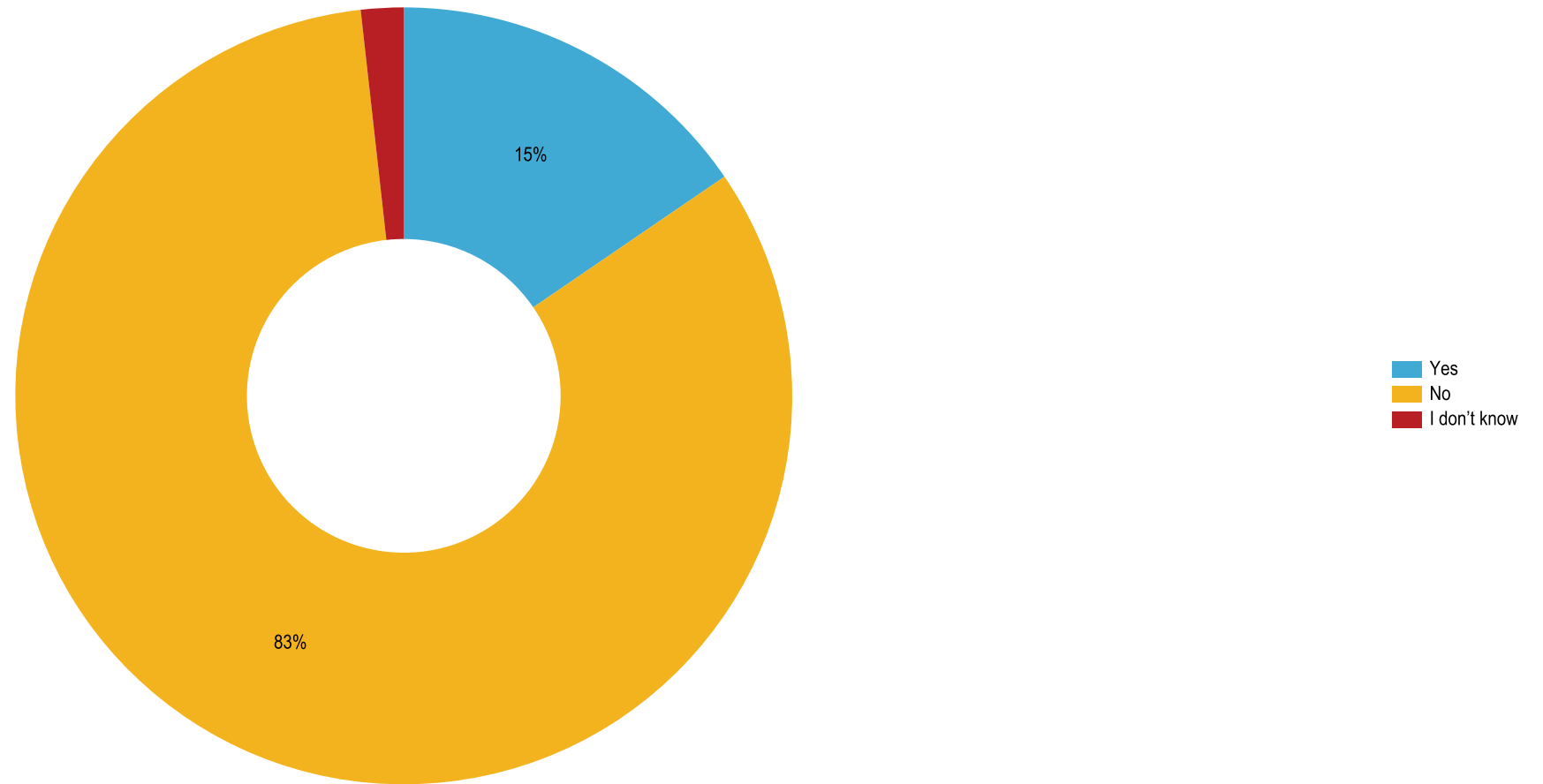
# Healthy snacks that are offered

What healthy snacks do they offer?



# Absence through stress

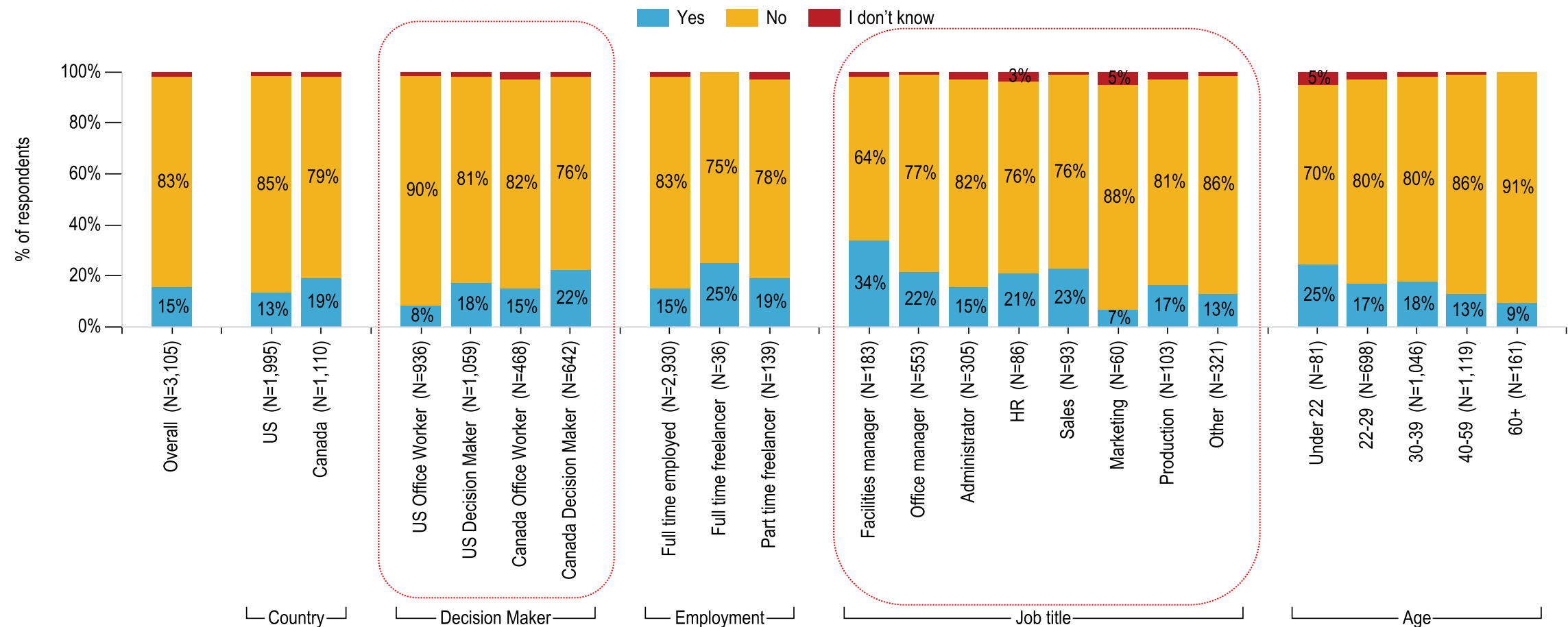
Have you ever had to take a leave of absence (more than a few days) due to stress in your job?



# Profile: Absence through stress

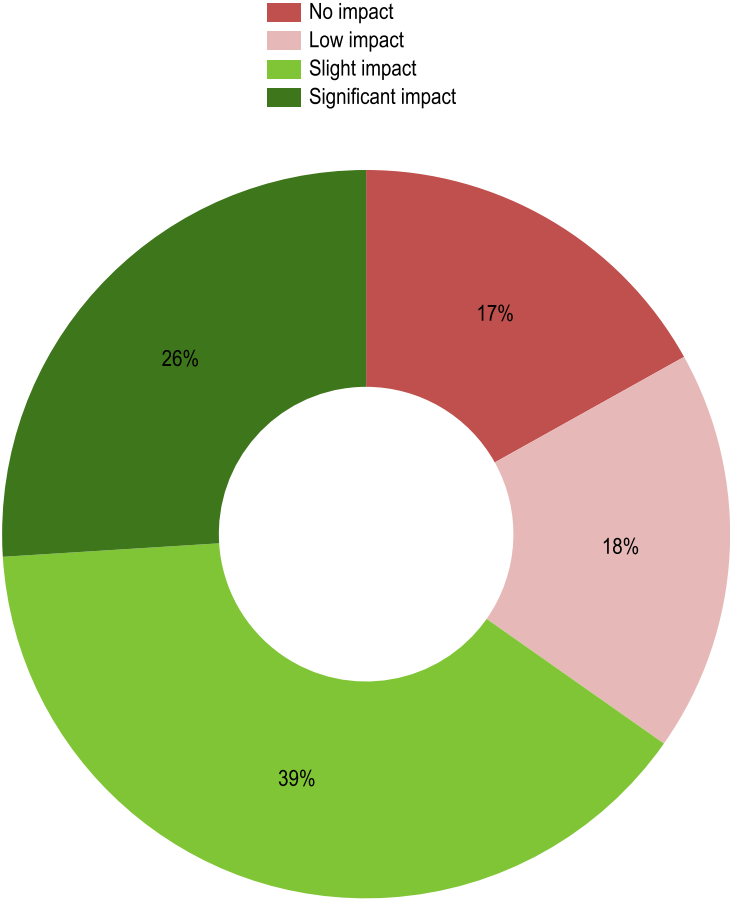
Canadian decision makers report taking a leave of absence due to stress more often than others – same applies to facilities managers.

Have you ever had to take a leave of absence (more than a few days) due to stress in your job?



# Workplace impact on stress

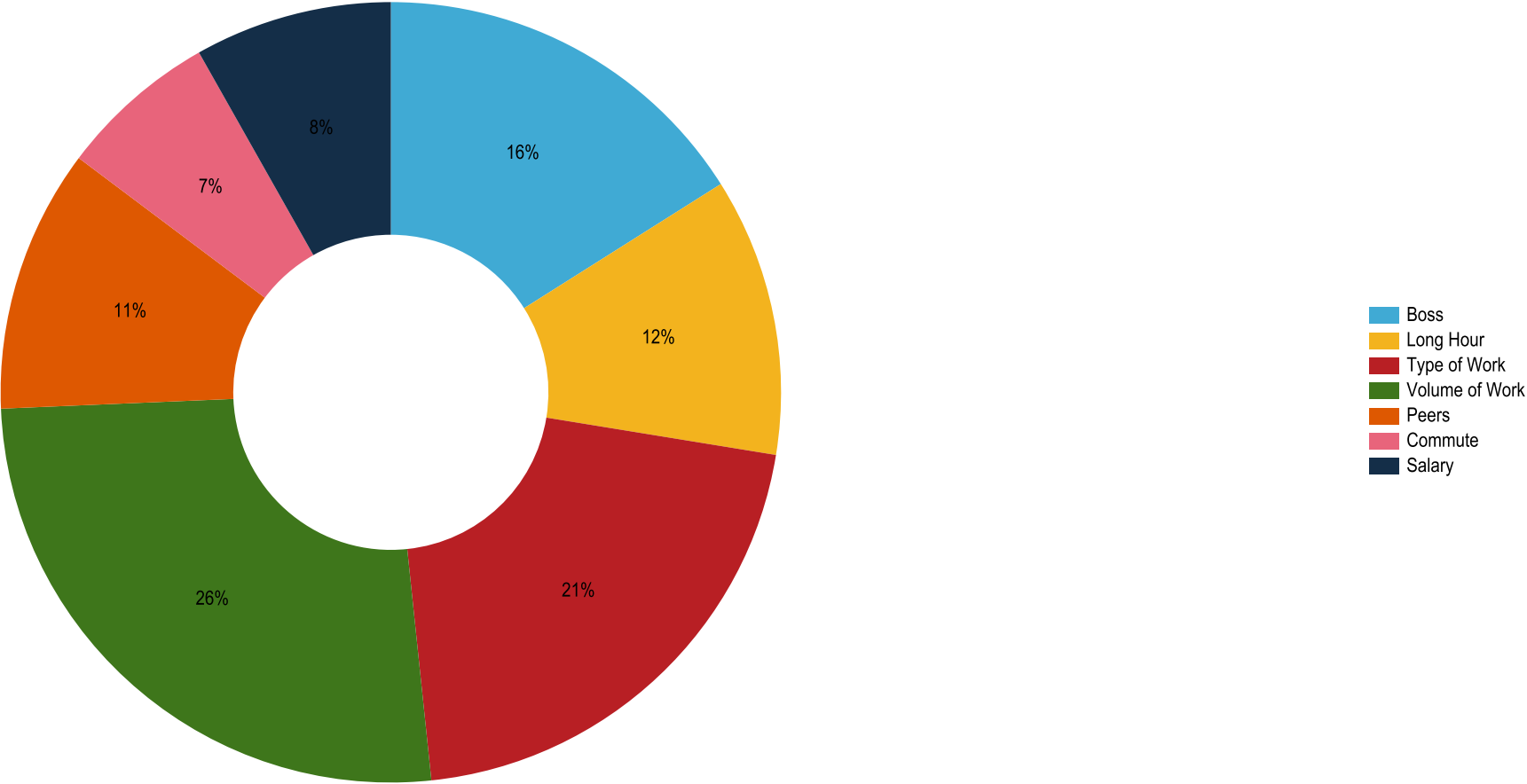
Rate how your workplace has been a contributing factor to stress





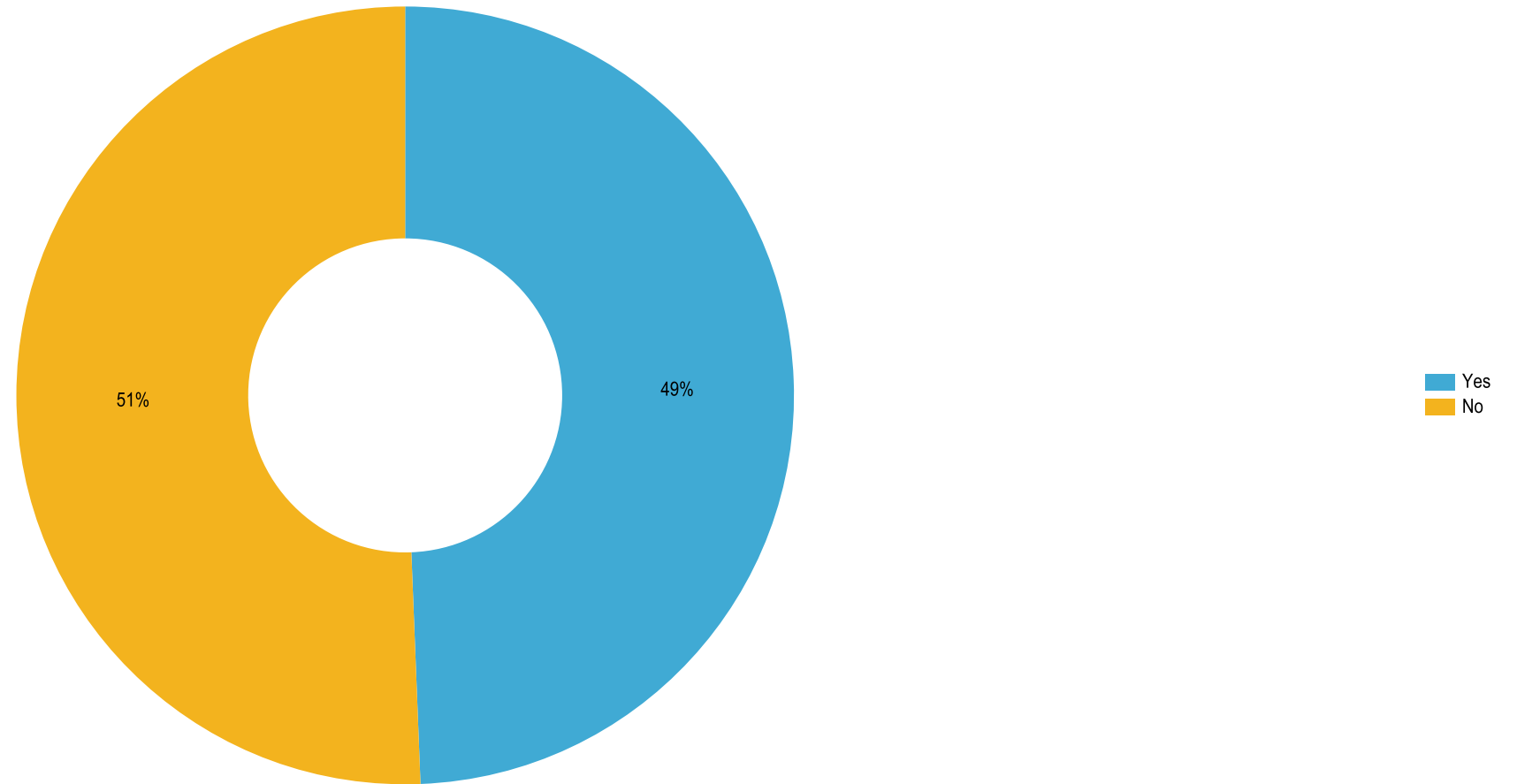
# The most stressful part of the workplace

What is the number one stressor in your workplace?



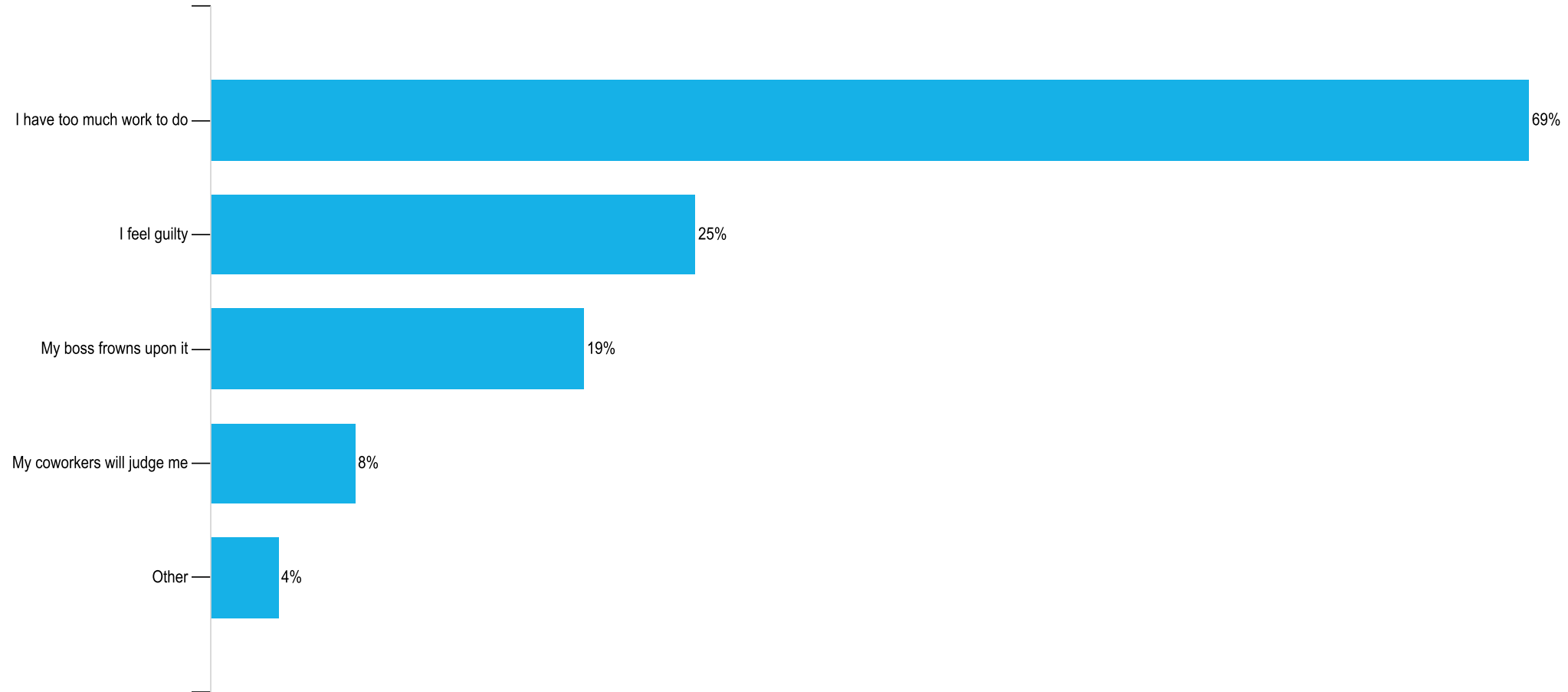
# Having a break

Do you ever feel like you can't get up from your desk to take a break?



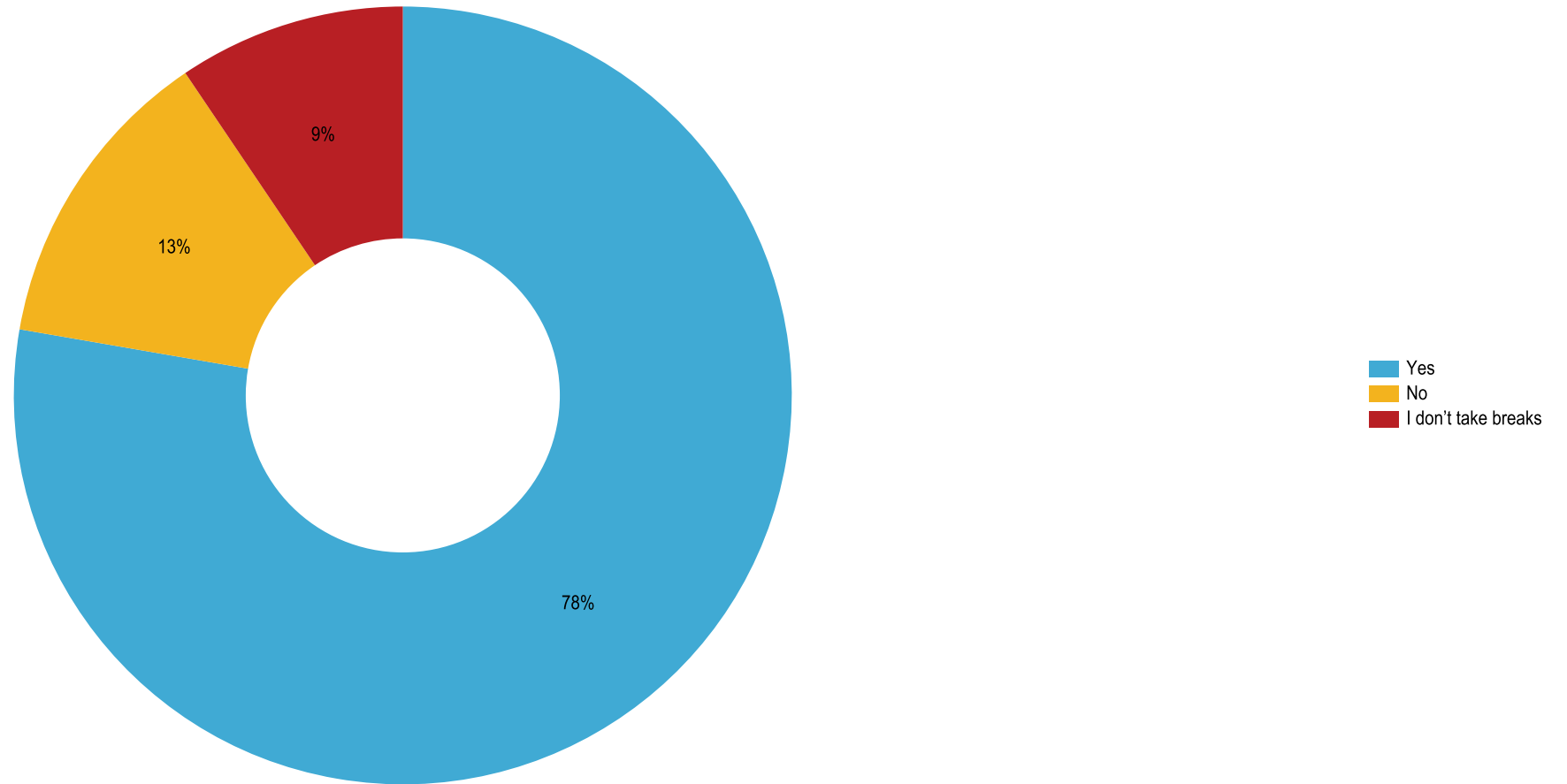
# Reasons for not taking a break

Why do you feel like you can't?



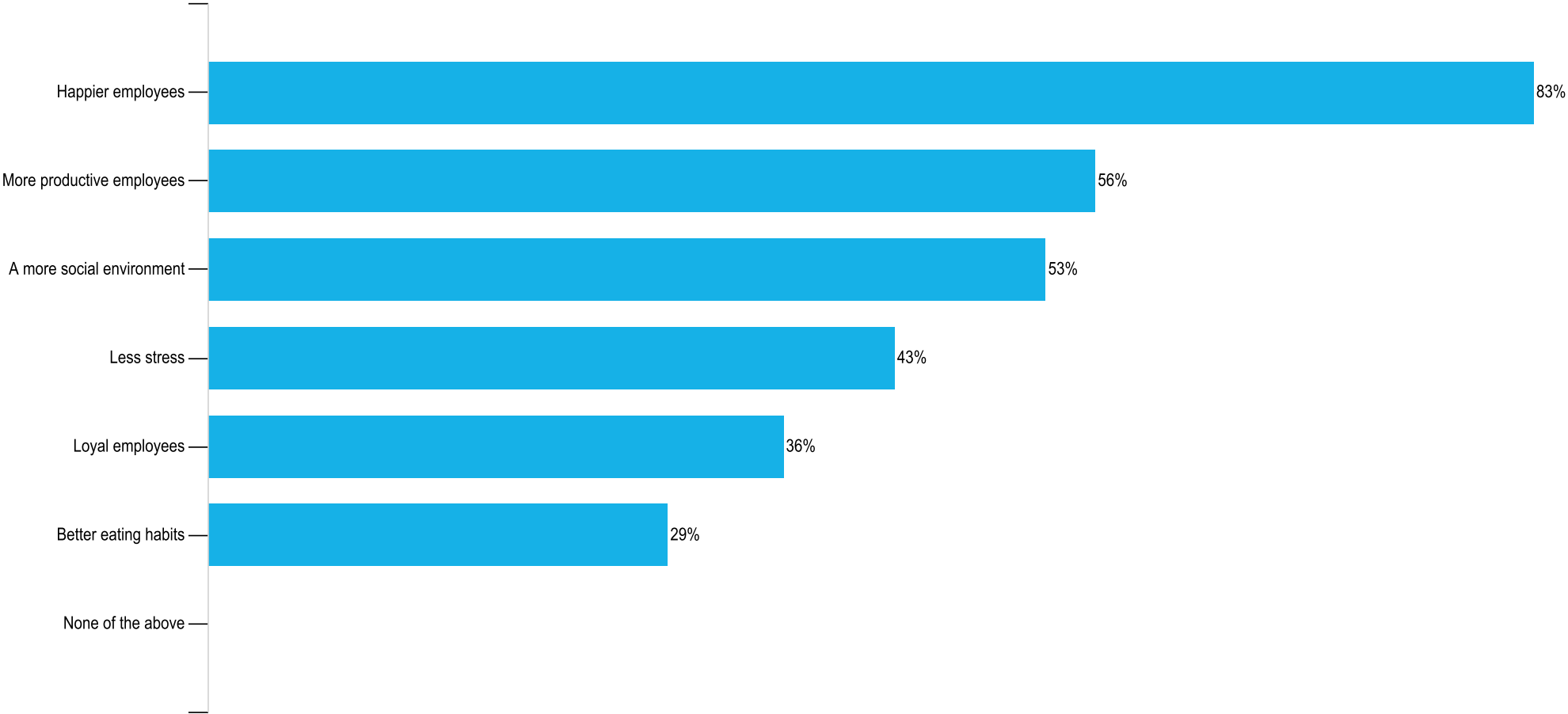
# Improved productivity after a taking a break

Does taking a break make you feel more productive throughout the day?



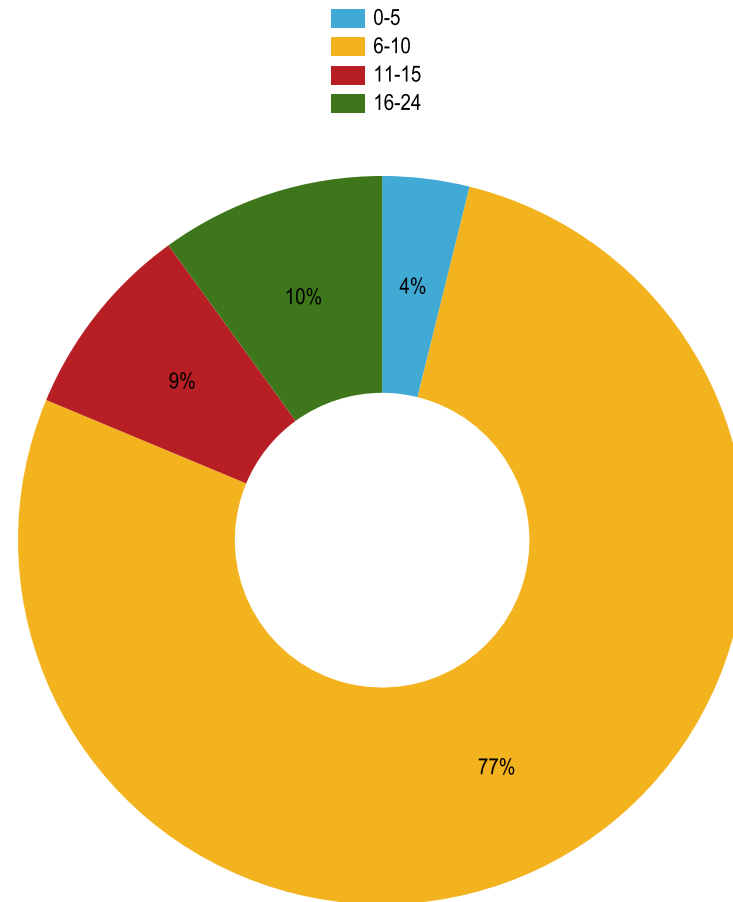
# The impact of a well-stocked breakroom

Please indicate if you feel a well-stocked breakroom leads to any of the following?



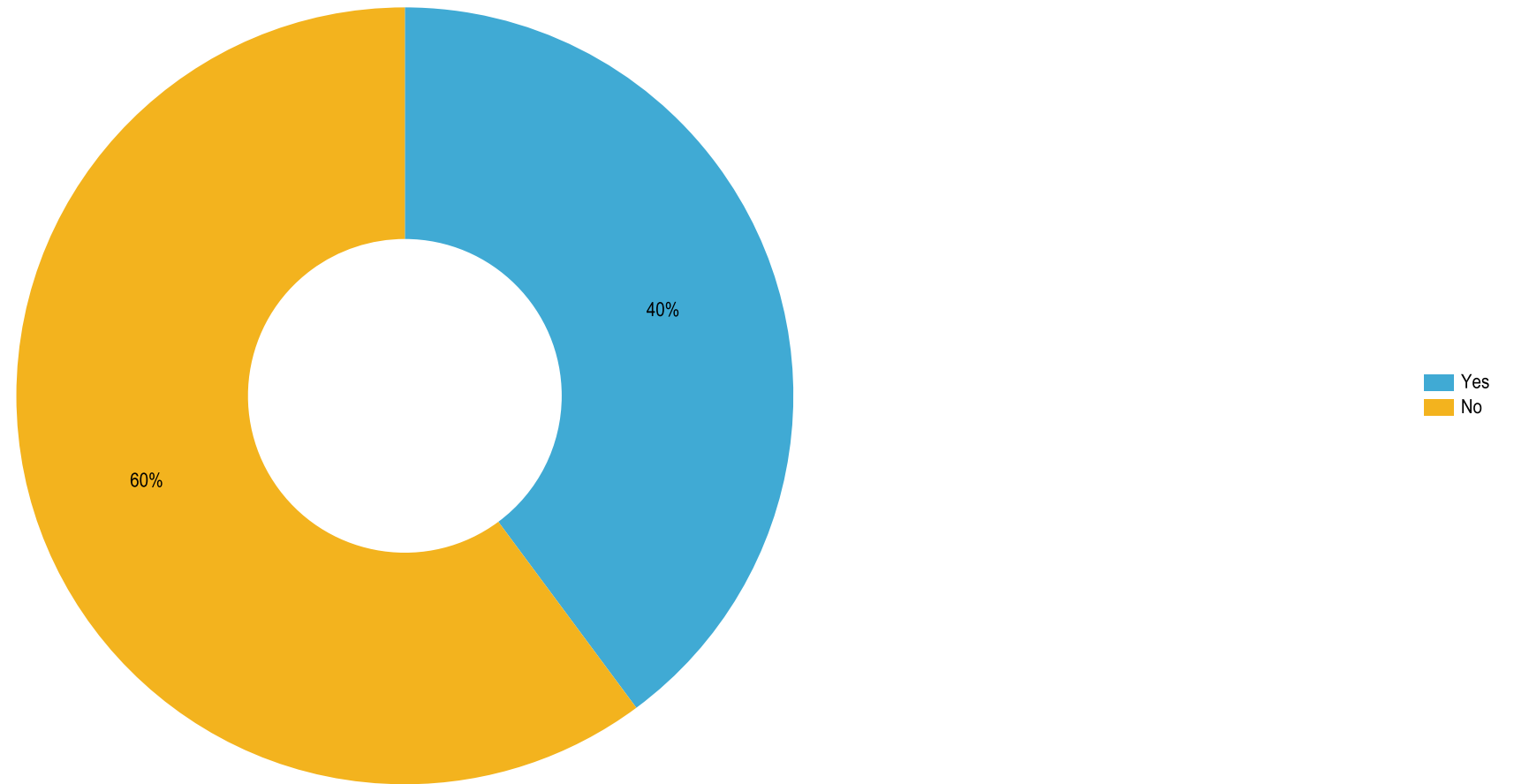
# The average work day

How many hours a day, on average, do you spend on work?



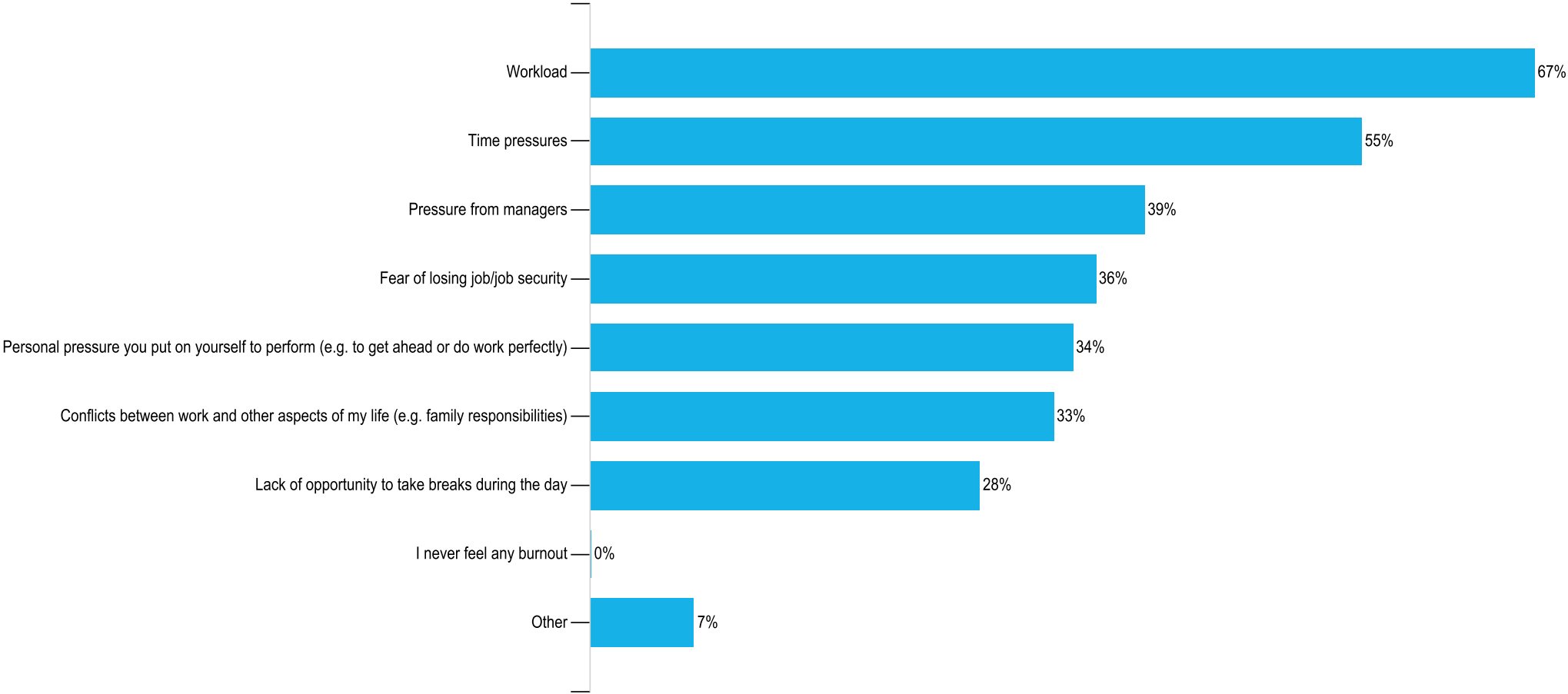
# Burnout at work

Do you feel burnt out at work?



# Reasons for burnout

Which of the following aspects of your job do you think contribute to the burnout you feel?

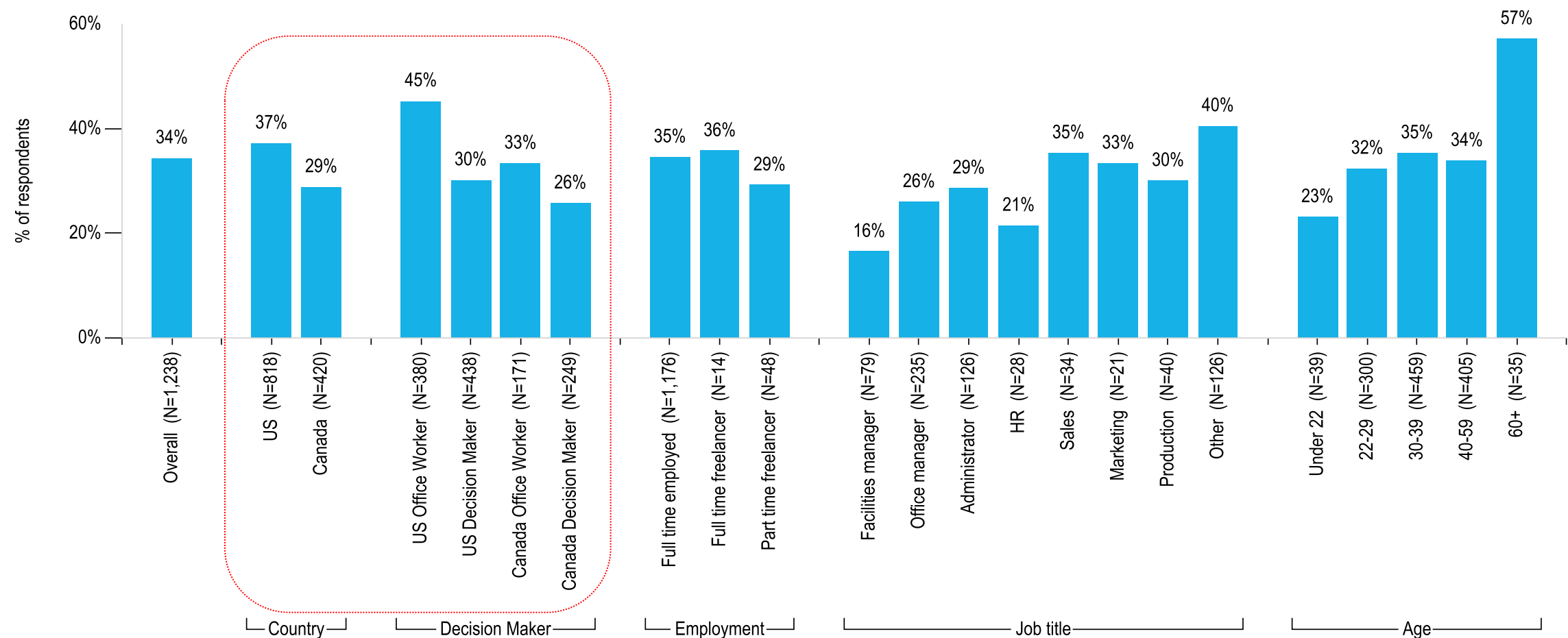




# Profile: Personal pressure you put on yourself to perform (e.g. to get ahead or do work perfectly)

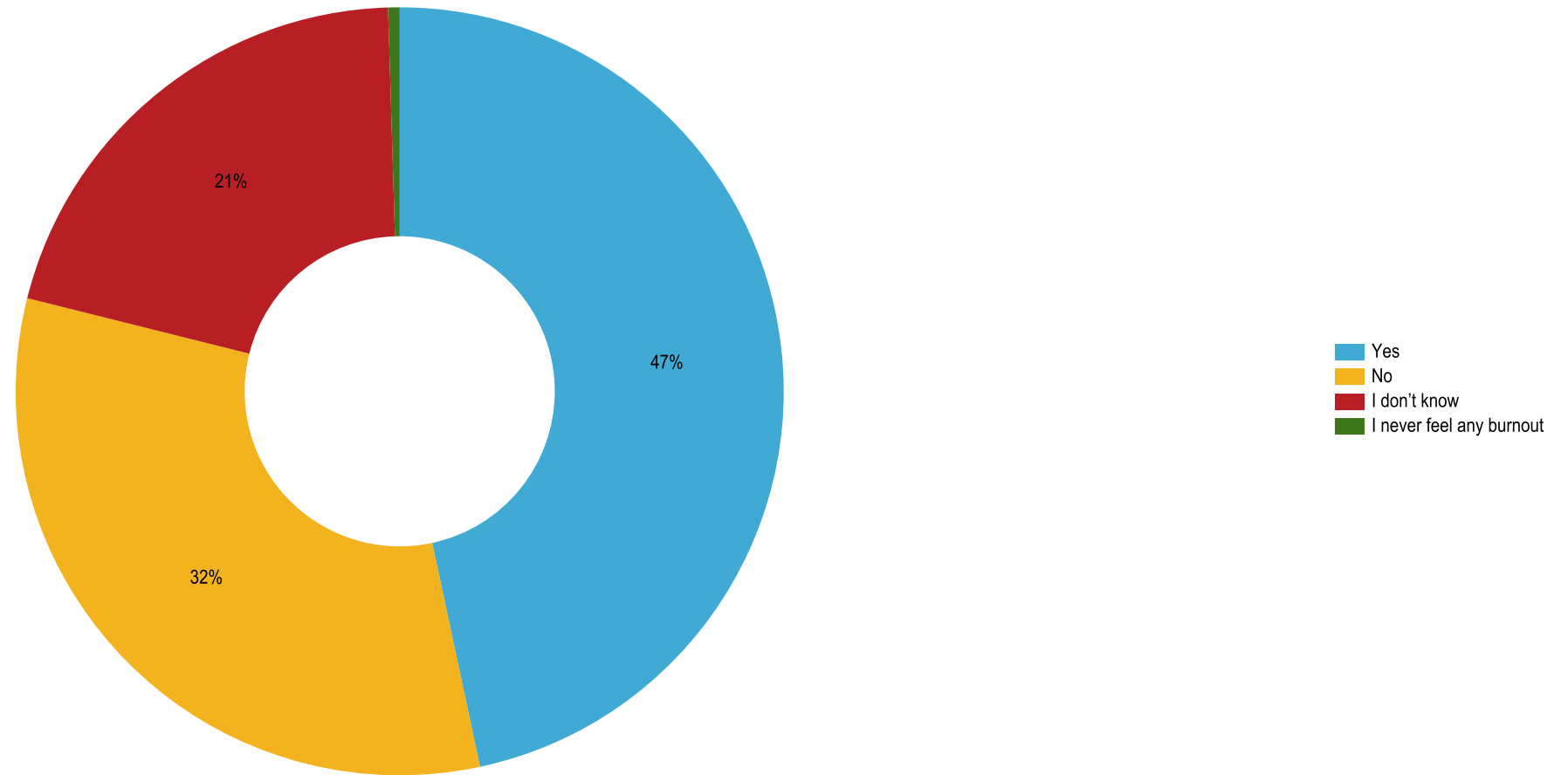
It appears that the workers in US are under personal pressure that leads to the burnout more often than others.

Which of the following aspects of your job do you think contribute to the burnout you feel?



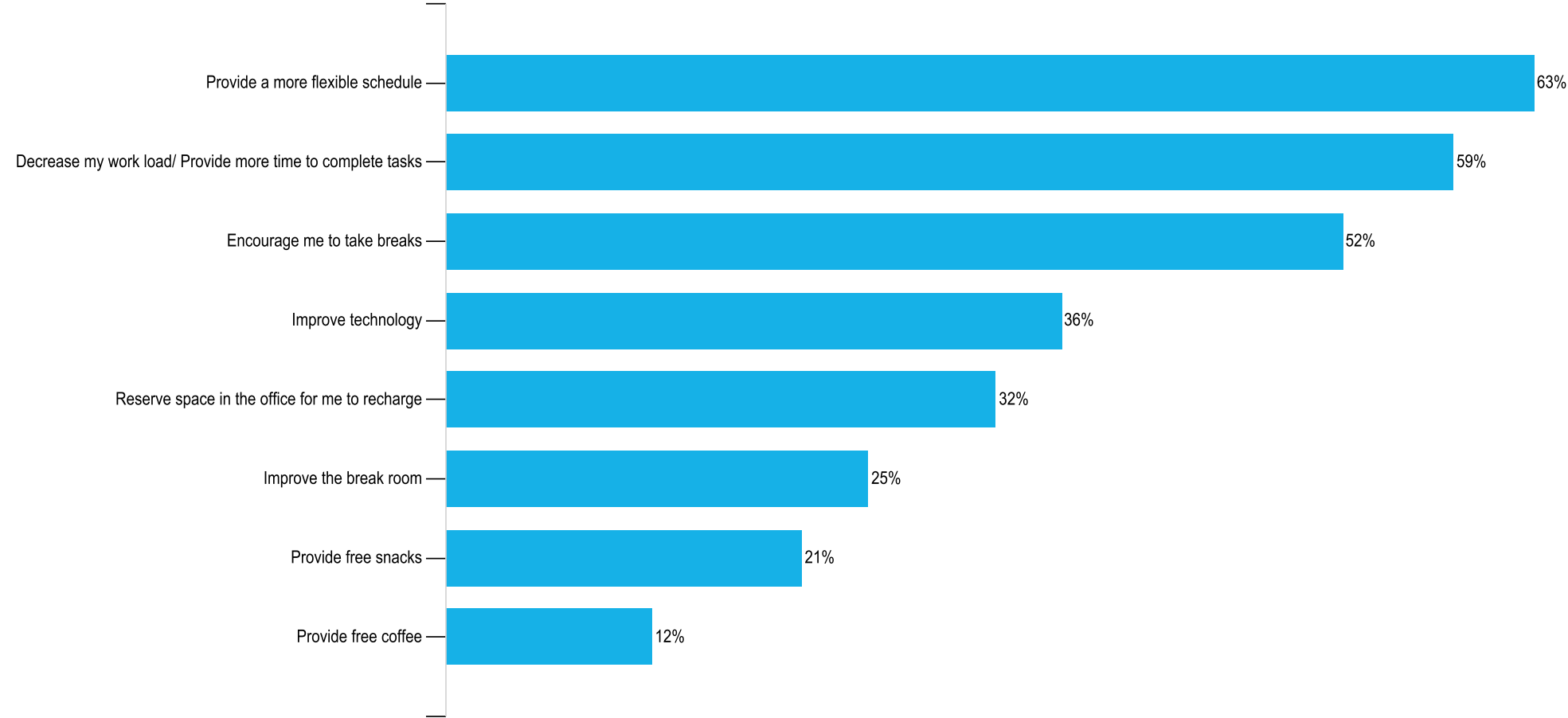
# Burnout leading to looking for a new job

Is this burnout motivating you to look for another job?



# How the employer can reduce burnout

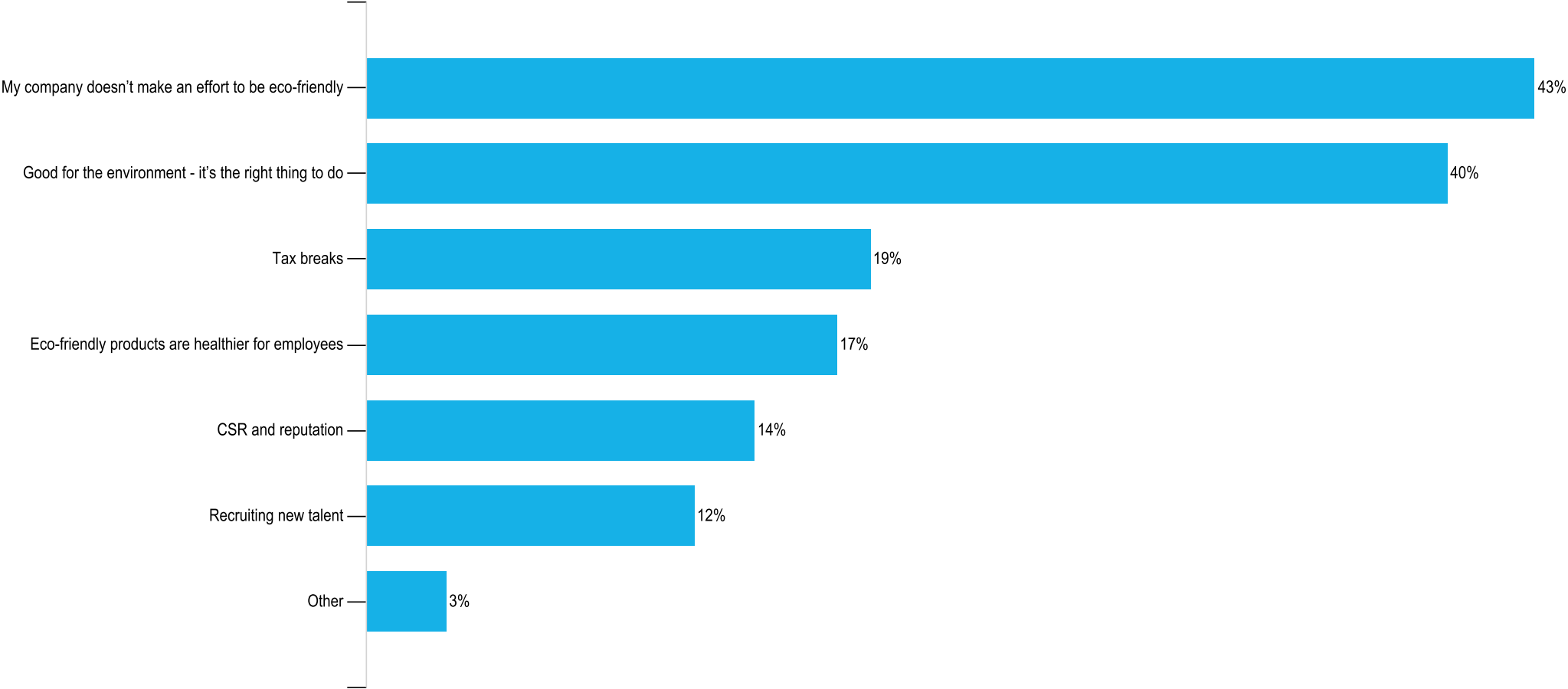
How could your employer help you avoid experiencing burn out?



*Sustainability*

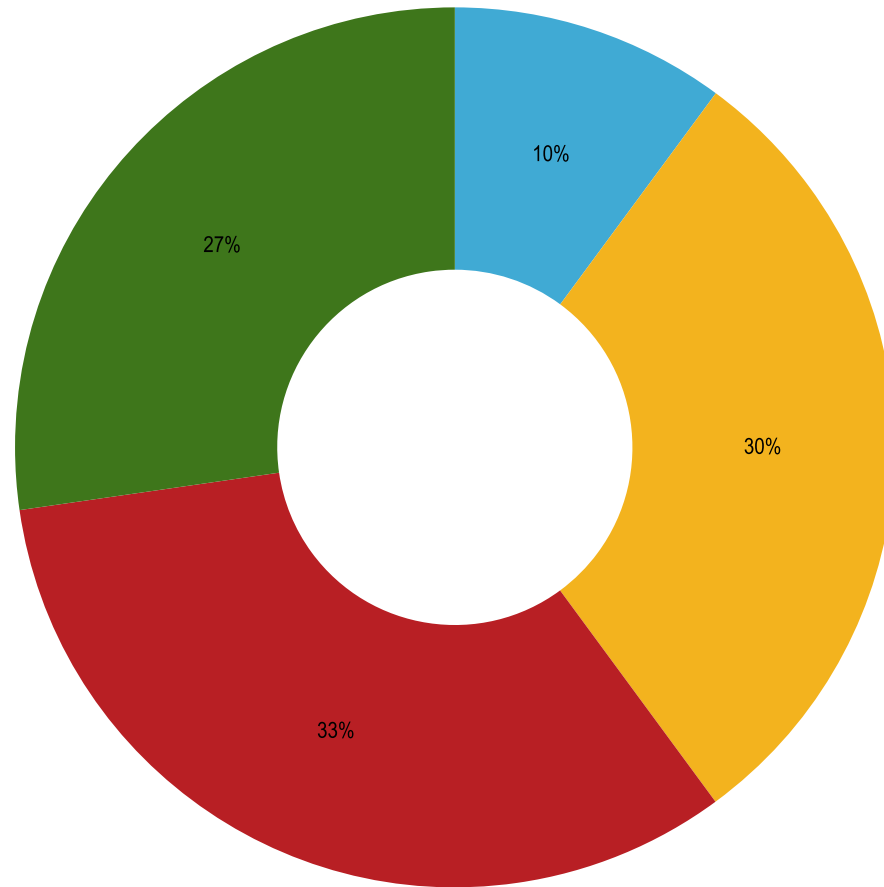
# Eco friendly drivers

What is driving eco-friendly efforts in your organization?



# The importance of a eco-friendly workplace

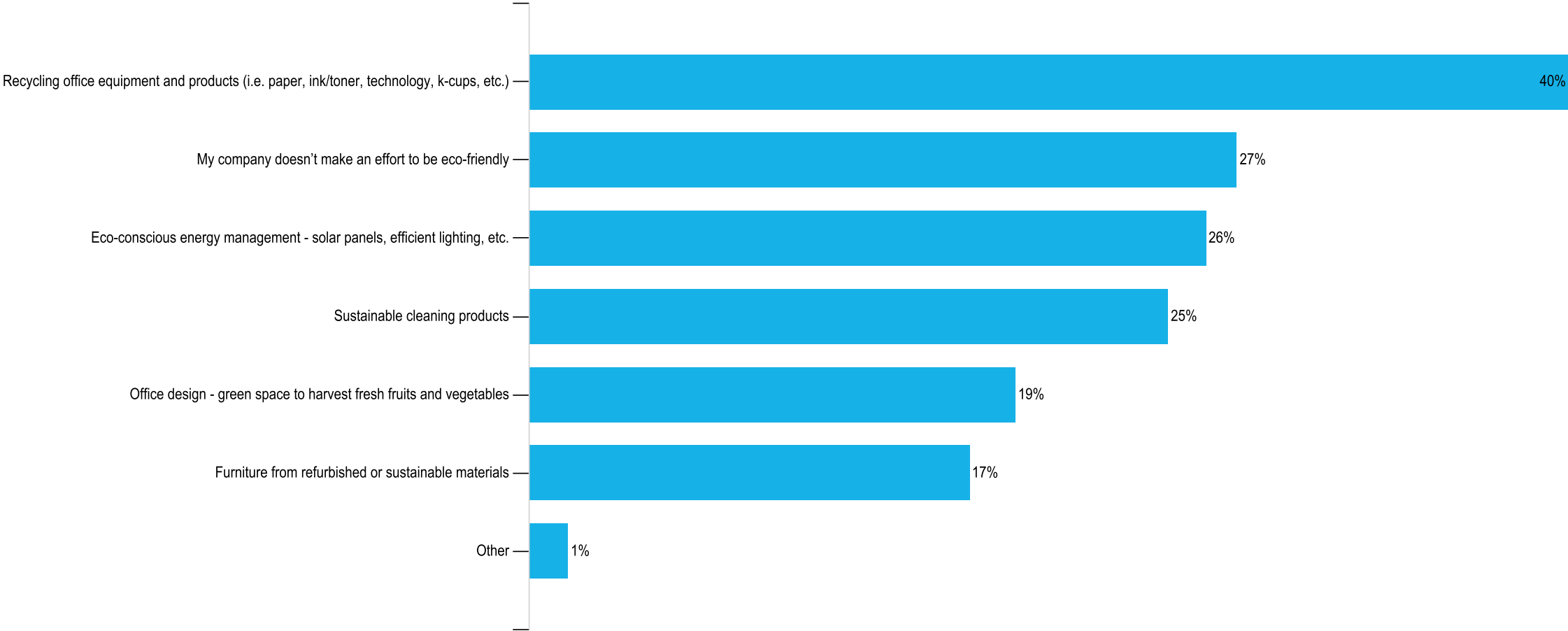
How important is an eco-friendly company when making an employment decision?



- It is a key factor in my decision process
- It's very important
- It's somewhat important
- It doesn't impact my decision process at all

# The incorporation of eco friendly practices

How are eco-friendly practices being incorporated in your workplace

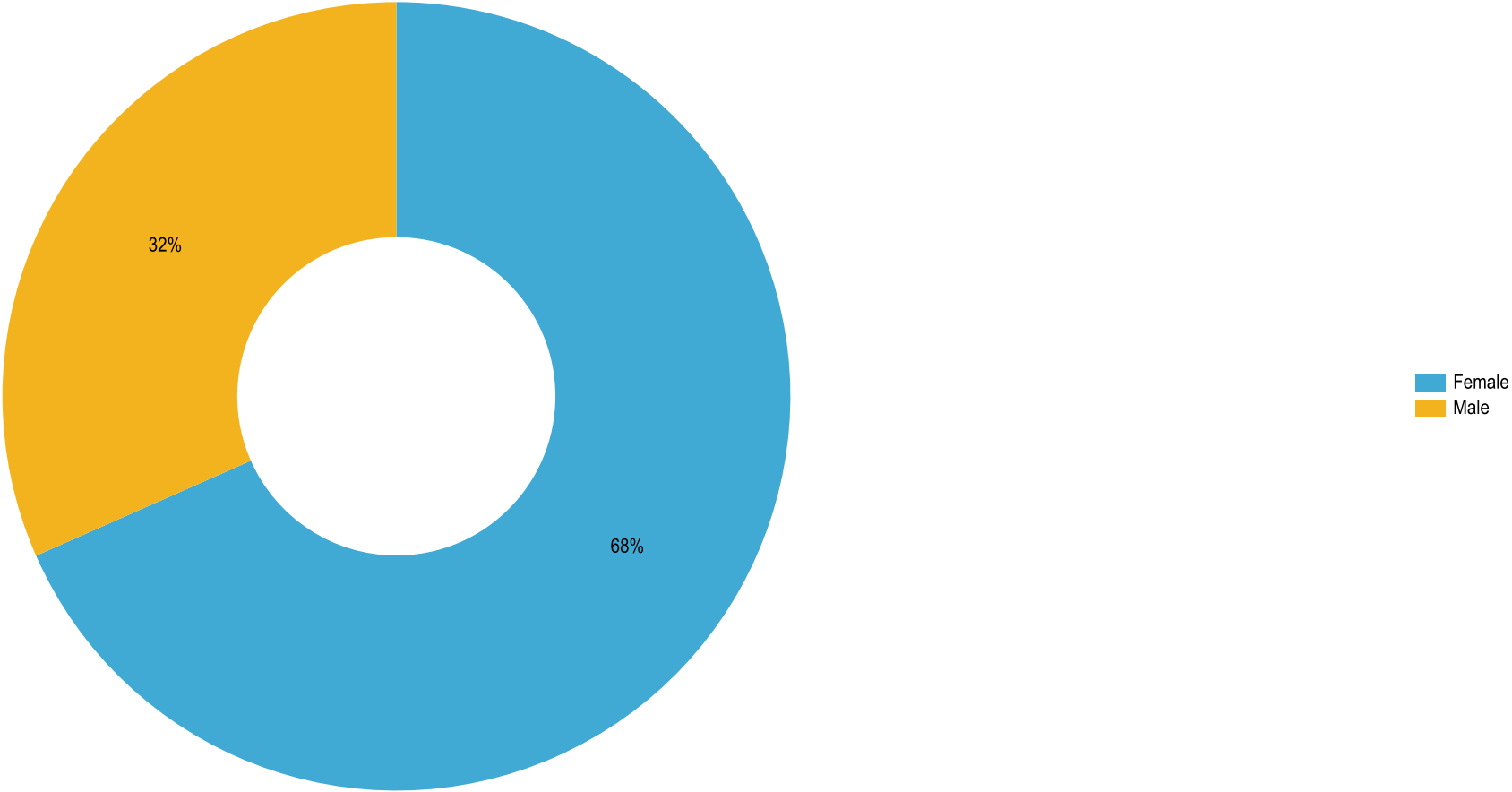


# *Appendix*



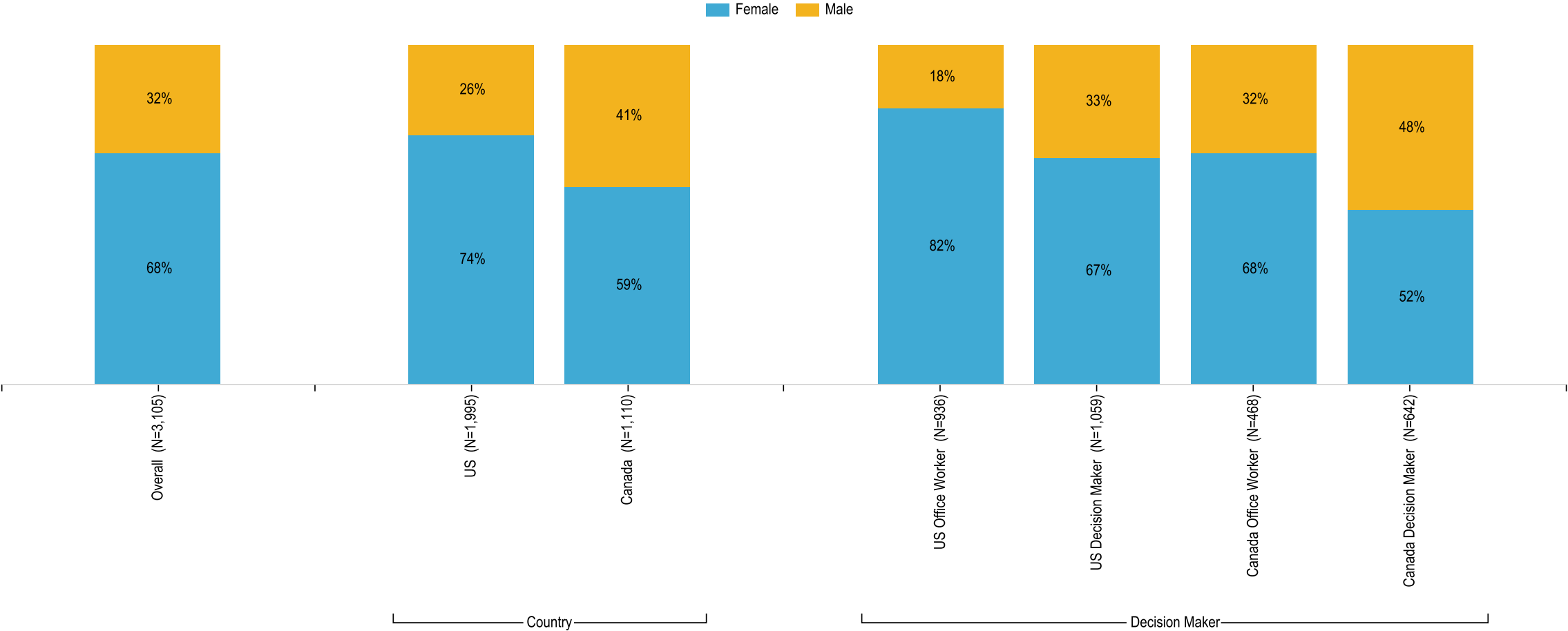
# Gender

Are you male or female?



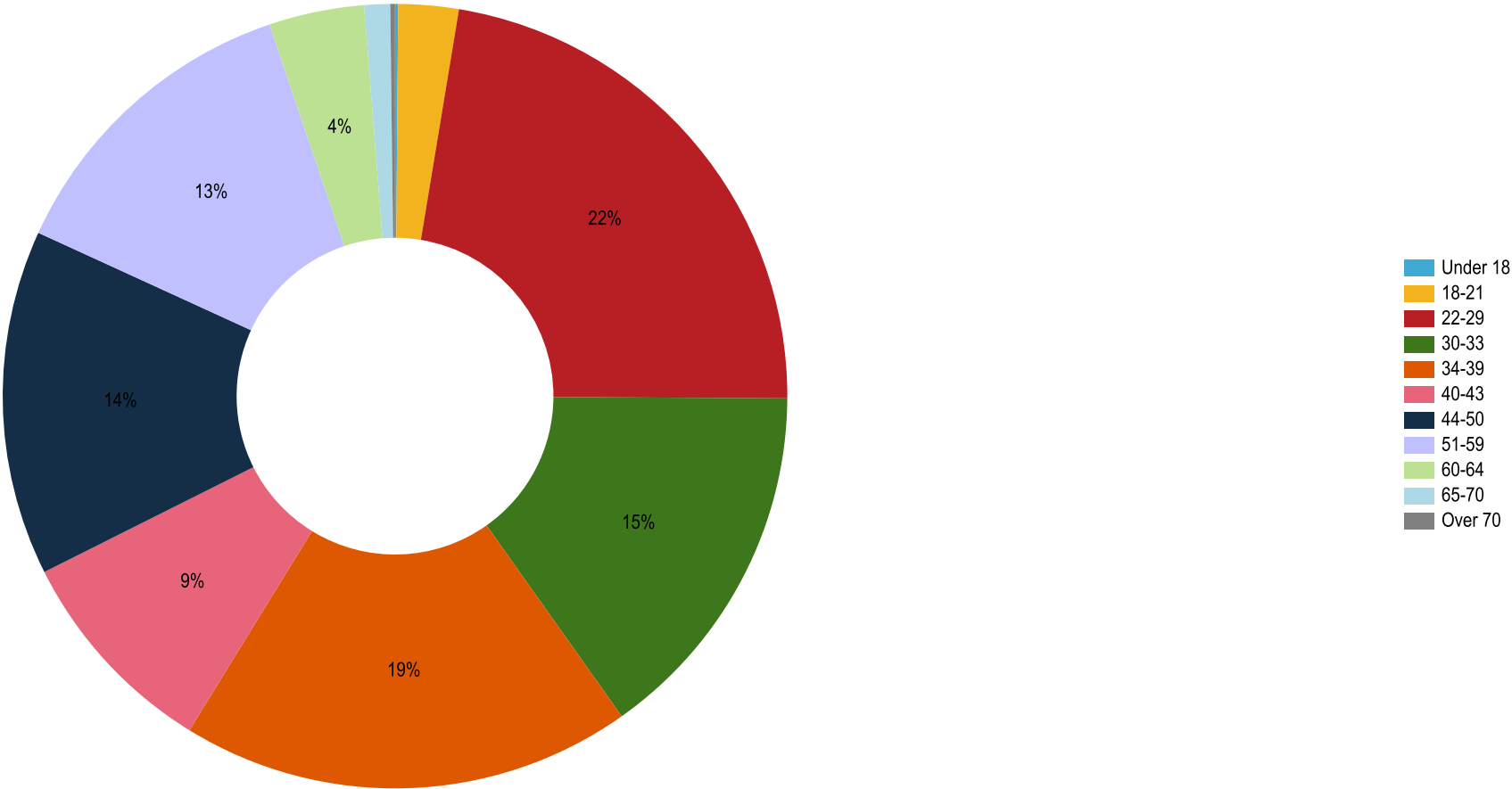
# Profile: Gender

Are you male or female?



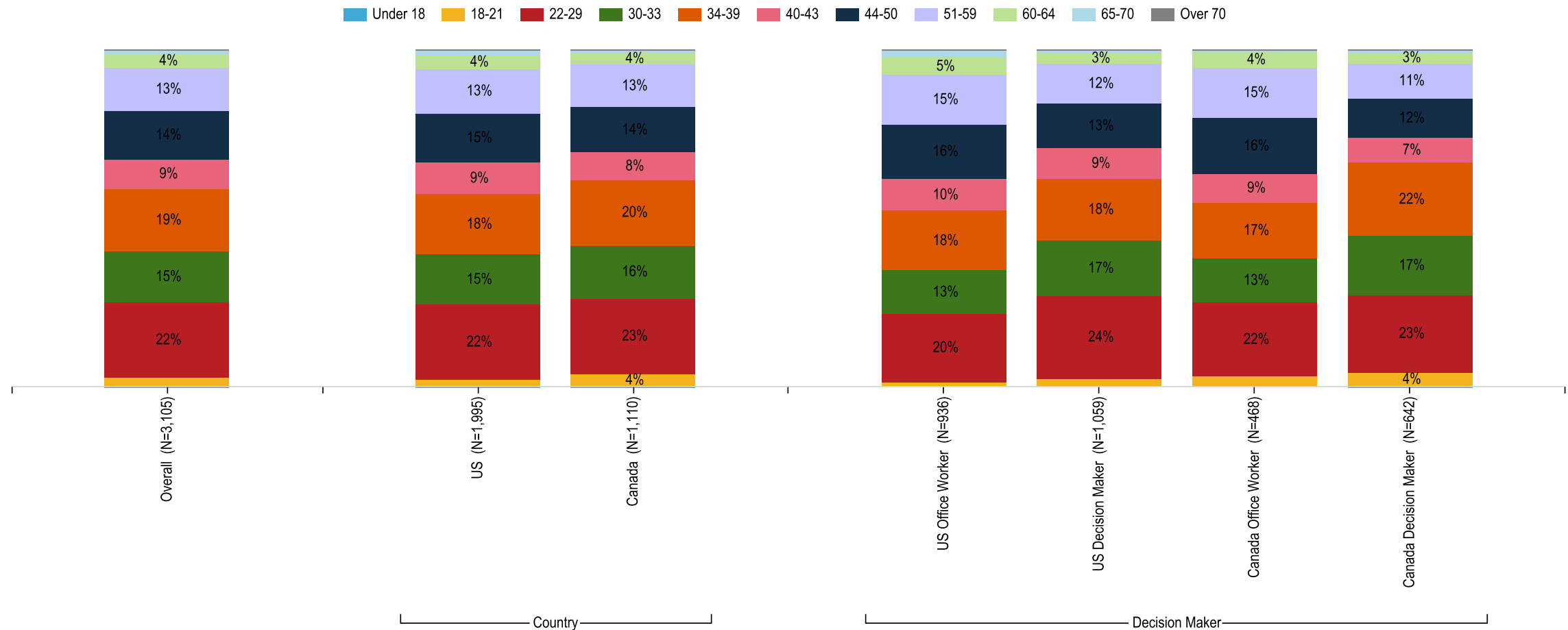
# Age ranges

Which of the following categories best indicates your age?



# Profile:Age ranges

Which of the following categories best indicates your age?





*Thank you*

*Jane Hales – [jane.hales@morarconsulting.com](mailto:jane.hales@morarconsulting.com)*

*Bozena Culunlu – [bozena.culunlu@morarconsulting.com](mailto:bozena.culunlu@morarconsulting.com)*

*George.Marsden@morarconsulting.com*

*Morar Consulting  
65-73 Bermondsey Street, London SE1 3XF  
T +44 (0)20 7908 6530*

*London - New York - San Francisco*