TREND RAPPORT

BBWG

March 2022





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INTRODUCTION



INTRODUCTION

- **Objective:** The goal of this report is twofold:
 - Make an inventory of the situation today: how mature are the participants on average?
 - Give an overview of the evolutions compared to last year.
- **Remarks**: given the set-up of this project there are some elements that have to be taken into account when reading this report:
 - The sample of this study is heterogeneous and limited in terms of size. The main consequence is that no generalisation is possible for larger populations (e.g. companies in Flanders, SMEs, ...).
 - The statements will always relate to the (clearly demarcated) population: 'Participants in BBWG'.
 - When looking at evolutions we will only take the returning participants into account.



EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

1

THE PARTICIPATING ORGANISATIONS ARE ALREADY QUITE MATURE AND IMPROVING

Across all components the average maturity of the participating organisations is somewhere between a fragmented and structural policy. The participants have been busy implementing policies based on the new-way-of-working principles. This is illustrated by the progress that has been made by organisations that participated last year and this year. They are committed to the program and are moving in the right direction, especially on components related to working from home and the bicycle culture.

2

BUT, THE WORK ISN'T DONE. THERE IS STILL ROOM FOR IMPROVEMENT SPECIFICALLY ON THE 'PEOPLE FOCUS'

The maturity on the involvement of employees in a hybrid working context hasn't improved. Which might be related to the corona crisis and the difficulties that arise from mandatory remote working in terms of employee involvement. However, this is something the participants acknowledge themselves (a sign of self-awareness, the first step on the path to changes). This is demonstrated by the fact that they have given the components about people-focused hybrid the highest priority to work on in the coming months.

A NOTE ON SME'S, LE'S AND LG'S

There are some interesting differences between the tree types of participants:

- 3
- On maturity: Overall we can state that Local governments are relatively less mature on most components (in comparison with SME's and LE's) Note: this could be caused by the fact that LG's have the highest proportion of site-specific employees. When comparing SME's with LE's, we observe that the LE's are relatively less mature on a green fleet & people first workplace design than SME's. But they are more mature in terms of public transport.
- In terms of plans and priorities: There is a large consistency in priorities across SME, LE and LG. There is only one big point of difference, namely that the latter favours the bicycle culture over a green fleet for commuting.



RESULTS



OVERVIEW OF THE SITUATION TODAY

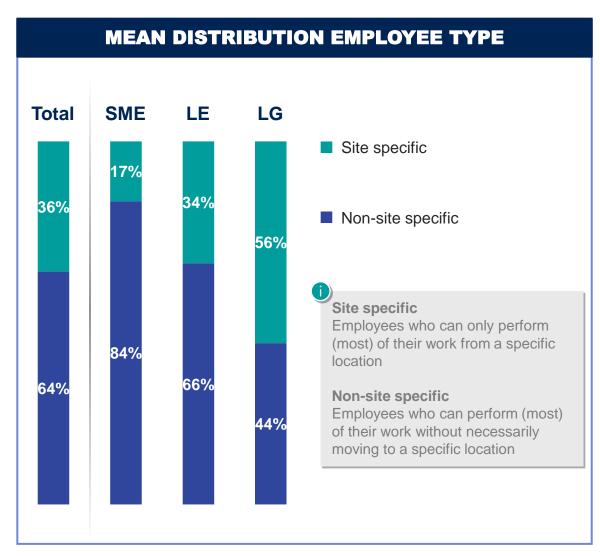
3. Results

In this section all organisations that participated in 2022 are included.



PARTICIPANTS OF 2022 - AVERAGE PROFILE















OVERVIEW



3.1. Overview of the situation today



THE SITUATION TODAY

Overview



MATURITY

Across all components the average maturity of the participating organisations is somewhere between a fragmented and structural policy.

- The most mature component is having a policy on remote working
- The **lowest maturity** can are on having a workplace design that puts people and their activities first and a green fleet for commuting

Local governments are relatively less mature across the components (vs. SME's and LE's).



PLANS & PRIORITIES

The **most mentioned priorities** among the participating organisations are:

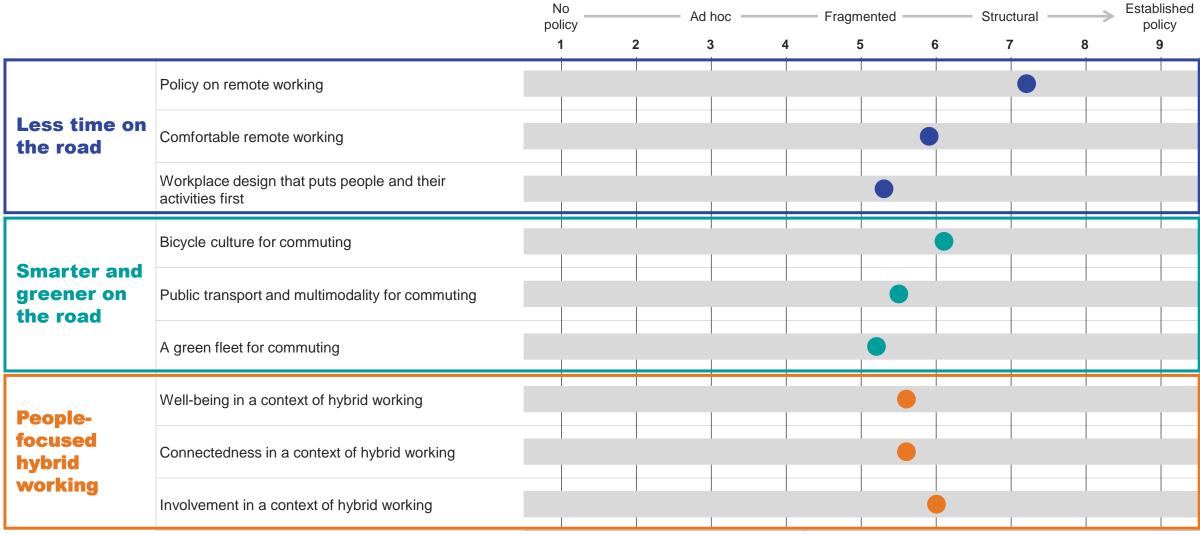
- Well-being in a context of hybrid working
- Workplace design that puts people and their activities first
- Connectedness in a context of hybrid working

Which is a sign that companies are moving the focus to more well-being.

The priorities are quite consistent across SME, LE and LG. There is only one big point of difference, namely that the latter favours the bicycle culture over a green fleet for commuting.

MATURITY TODAY – OVERVIEW

On average the maturity is situated between fragmented and structural policies.













MATURITY TODAY – SPLIT ON BENCHMARKS

		TOTAL	SME	LE	LG
	Policy on remote working	7,3	7,4	7,3	7,0
Less time on the road	Comfortable remote working	5,9	6,2	6,1	5,4
	Workplace design that puts people and their activities first	5,4	6,6	5,6	4,0
Consultan and	Bicycle culture for commuting	6,1	6,1	6,0	6,2
Smarter and greener on the road	Public transport and multimodality for commuting	5,6	4,8	5,8	5,8
	A green fleet for commuting	5,2	6,9	5,1	4,0
People-	Well-being in a context of hybrid working	5,6	6,0	5,9	4,6
focused hybrid	Connectedness in a context of hybrid working	5,5	6,2	5,6	4,9
working	Involvement in a context of hybrid working	6,0	6,6	6,3	5,0











MATURITY TODAY – SPLIT ON BENCHMARKS

Local governments, that participated, seem to be less mature on people focused hybrid working and working remotely.

		TOTAL	SME	LE	LG
	Policy on remote working	7,3	7,4	7,3	7,0
Less time on the road	Comfortable remote working	5,9	6,2	6,1	5,4
	Workplace design that puts people and their activities first	5,4	6,6	5,6	4,0
	Bicycle culture for commuting	6,1	6,1	6,0	6,2
Smarter and greener on the road	Public transport and multimodality for commuting	5,6	4,8	5,8	5,8
the road	A green fleet for commuting	5,2	6,9	5,1	4,0
People-	Well-being in a context of hybrid working	5,6	6,0	5,9	4,6
focused hybrid	Connectedness in a context of hybrid working	5,5	6,2	5,6	4,9
working	Involvement in a context of hybrid working	6,0	6,6	6,3	5,0









MATURITY TODAY – SPLIT ON BENCHMARKS

The participating **large enterprises** are relatively less mature on a green fleet & people first workplace design than **SME's**. But are more mature in terms of public transport.

		TOTAL	SME	LE	LG
	Policy on remote working	7,3	7,4	7,3	7,0
Less time on the road	Comfortable remote working	5,9	6,2	6,1	5,4
	Workplace design that puts people and their activities first	5,4	6,6	5,6	4,0
	Bicycle culture for commuting	6,1	6,1	6,0	6,2
Smarter and greener on the road	Public transport and multimodality for commuting	5,6	4,8	5,8	5,8
ino rodu	A green fleet for commuting	5,2	6,9	5,1	4,0
People-	Well-being in a context of hybrid working	5,6	6,0	5,9	4,6
focused hybrid	Connectedness in a context of hybrid working	5,5	6,2	5,6	4,9
working	Involvement in a context of hybrid working	6,0	6,6	6,3	5,0











PLANS - OVERVIEW

Among the participating organisations, the plans on well-being are the most mature and ones on public transport the least. Awareness Analysis plans phase phase phase Policy on remote working Less time on Comfortable remote working the road Workplace design that puts people and their activities first Bicycle culture for commuting **Smarter and** Public transport and multimodality for commuting greener on the road A green fleet for commuting Well-being in a context of hybrid working Peoplefocused Connectedness in a context of hybrid working hybrid working Involvement in a context of hybrid working











PLANS – SPLIT ON BENCHMARKS

		TOTAL	SME	LE	LG
	Policy on remote working	1,7	1,8	1,7	1,5
Less time on the road	Comfortable remote working	1,3	0,9	1,4	1,4
	Workplace design that puts people and their activities first	1,8	1,8	1,7	2,0
0 1 1	Bicycle culture for commuting	1,5	0,9	1,3	2,2
Smarter and greener on the road	Public transport and multimodality for commuting	0,7	0,7	0,9	0,4
	A green fleet for commuting	1,4	1,7	1,7	0,6
People-	Well-being in a context of hybrid working	1,9	2,1	2,0	1,5
focused hybrid	Connectedness in a context of hybrid working	1,4	1,3	1,6	1,2
working	Involvement in a context of hybrid working	1,4	1,2	1,5	1,4

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PLANS – SPLIT ON BENCHMARKS

Local governments have less plans on a green fleet (because that might not be included in the standard benefits) and public transport (because they already have a rather high maturity).

		TOTAL	SME	LE	LG
	Policy on remote working	1,7	1,8	1,7	1,5
Less time on the road	Comfortable remote working	1,3	0,9	1,4	1,4
	Workplace design that puts people and their activities first	1,8	1,8	1,7	2,0
	Bicycle culture for commuting	1,5	0,9	1,3	2,2
Smarter and greener on the road	Public transport and multimodality for commuting	0,7	0,7	0,9	0,4
the road	A green fleet for commuting	1,4	1,7	1,7	0,6
People-	Well-being in a context of hybrid working	1,9	2,1	2,0	1,5
focused hybrid	Connectedness in a context of hybrid working	1,4	1,3	1,6	1,2
working	Involvement in a context of hybrid working	1,4	1,2	1,5	1,4











PLANS – SPLIT ON BENCHMARKS

LE's are generally speaking making the most plans across the components. **SME's** have (relatively) less plans on components like comfortably remote working and the bicycle culture.

		TOTAL	SME	LE	LG
	Policy on remote working	1,7	1,8	1,7	1,5
Less time on the road	Comfortable remote working	1,3	0,9	1,4	1,4
	Workplace design that puts people and their activities first	1,8	1,8	1,7	2,0
	Bicycle culture for commuting	1,5	0,9	1,3	2,2
Smarter and greener on the road	Public transport and multimodality for commuting	0,7	0,7	0,9	0,4
ano roda	A green fleet for commuting	1,4	1,7	1,7 1,4 1,7 1,3	0,6
People-	Well-being in a context of hybrid working	1,9	2,1	2,0	1,5
focused hybrid	Connectedness in a context of hybrid working	1,4	1,3	1,6	1,2
working	Involvement in a context of hybrid working	1,4	1,2	1,5	1,4

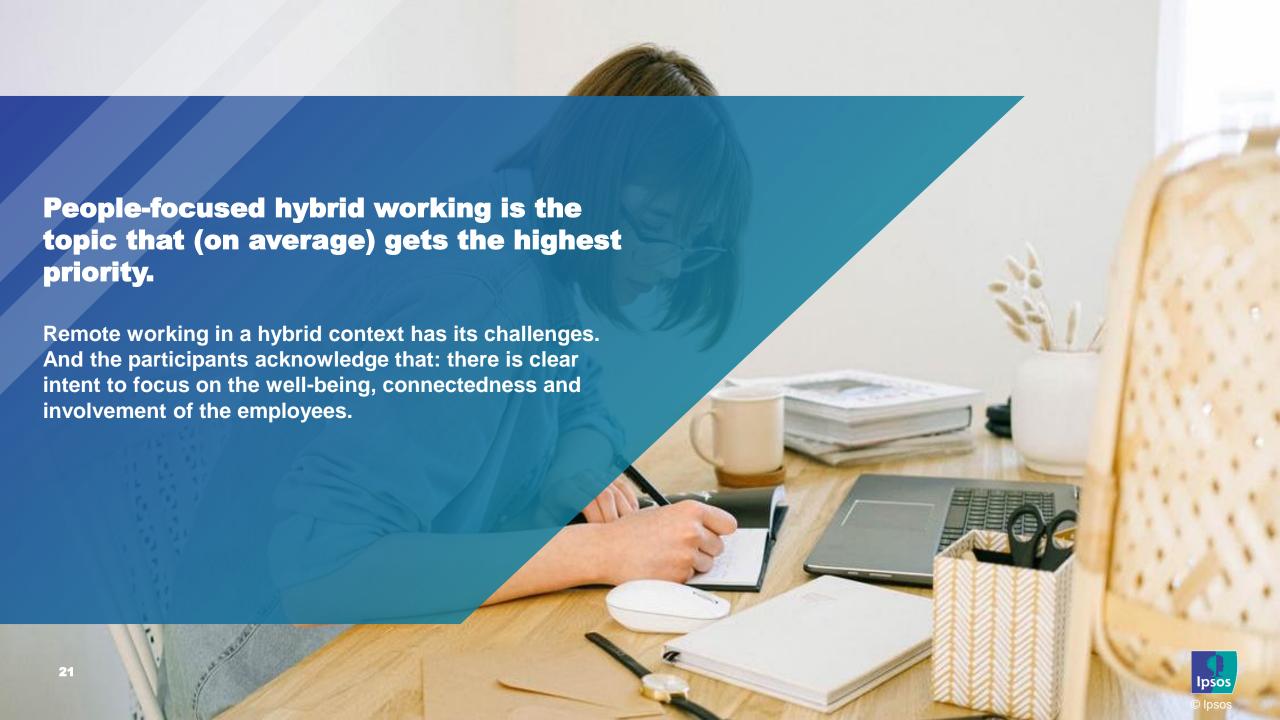












PRIORITIES - OVERVIEW

The priorities are quit consistent across SME, LE and LG. One key point of difference is that the latter favours the bicycle culture over a green fleet.

		TOTAL	SME	LE	LG
	Policy on remote working	9%	10%	7%	12%
Less time on the road	Comfortable remote working	6%	5%	7%	7%
	Workplace design that puts people and their activities first	14%	13%	7%	16%
	Bicycle culture for commuting	10%	6%	7%	18%
Smarter and greener on the road	Public transport and multimodality for commuting	5%	4%	7%	2%
ine road	A green fleet for commuting	10%	12%	13%	4%
People-	Well-being in a context of hybrid working	18%	23%	17%	16%
focused hybrid	Connectedness in a context of hybrid working	14%	14%	14%	13%
working	Involvement in a context of hybrid working	13%	12%	13%	13%











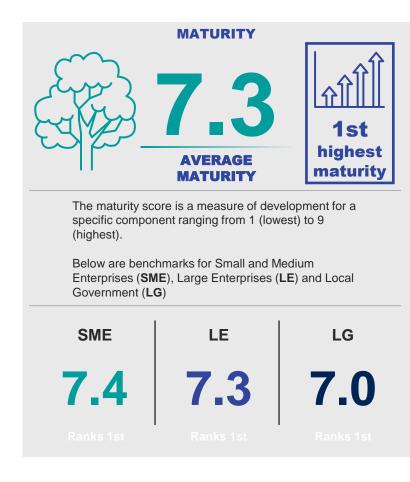
SUMMARY PER COMPONENT

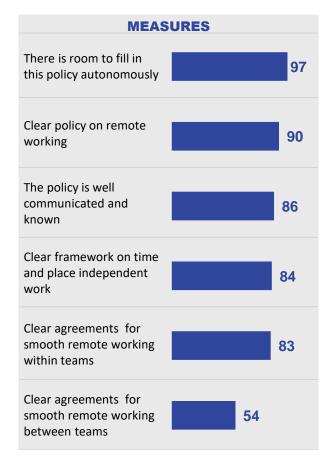


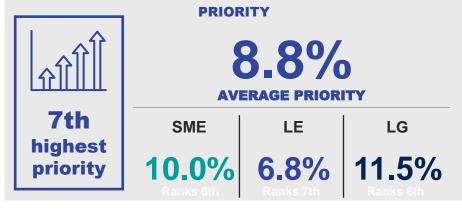
3.1. Overview of the situation today



POLICY ON REMOTE WORKING











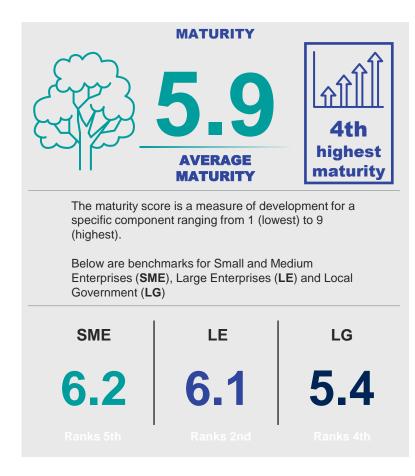
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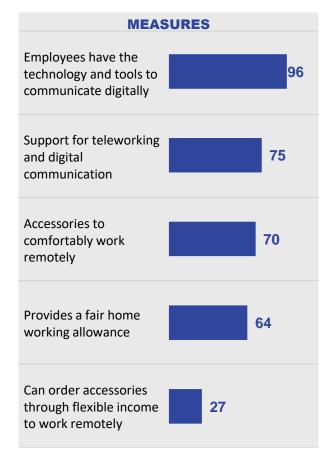
POLICY ON REMOTE WORKING - MEASURES



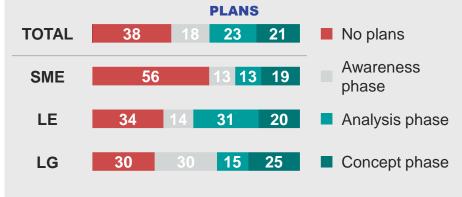


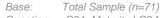
COMFORTABLE REMOTE WORKING







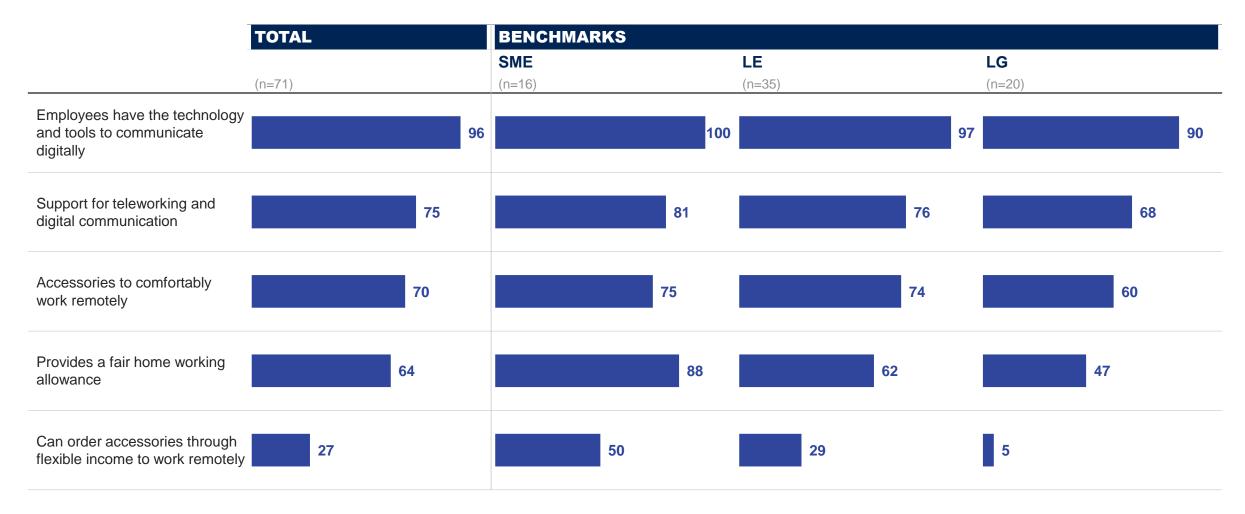




Question: Q21. Maturity | Q24. Measures | Q41. Priorities | Q31. Plans

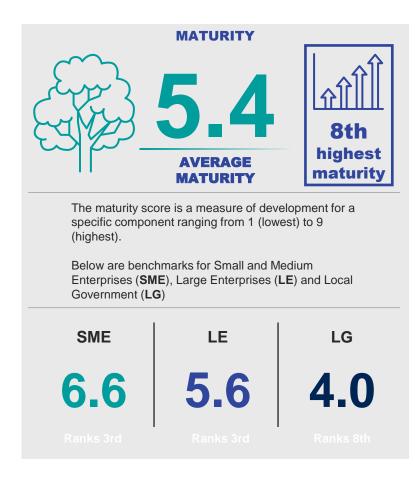


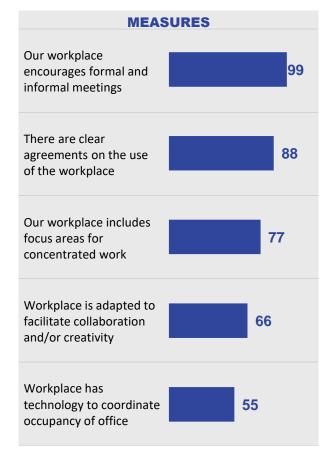
POLICY ON REMOTE WORKING - MEASURES

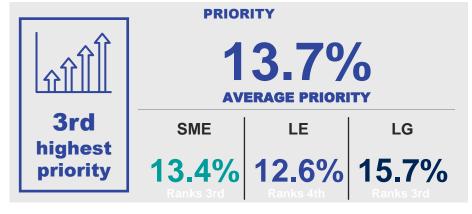




WORKPLACE DESIGN THAT PUTS PEOPLE AND THEIR ACTIVITIES FIRST









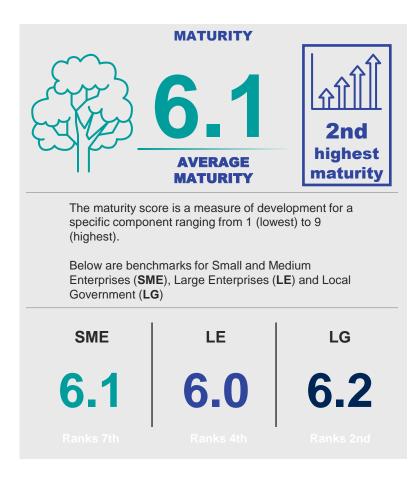


WORKPLACE DESIGN THAT PUTS PEOPLE AND THEIR ACTIVITIES FIRST - MEASURES





BICYCLE CULTURE FOR COMMUTING









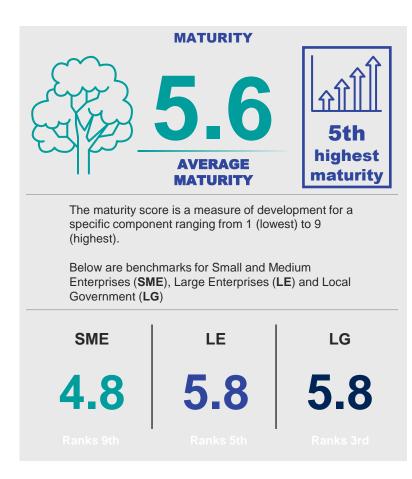


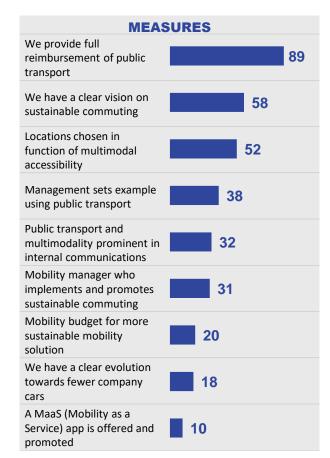
BICYCLE CULTURE FOR COMMUTING - MEASURES

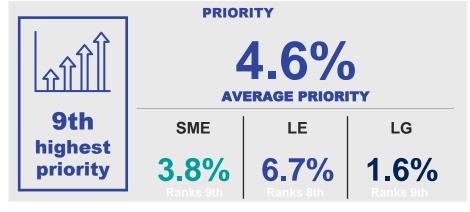


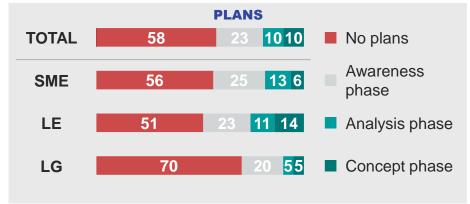


PUBLIC TRANSPORT AND MULTIMODALITY FOR COMMUTING









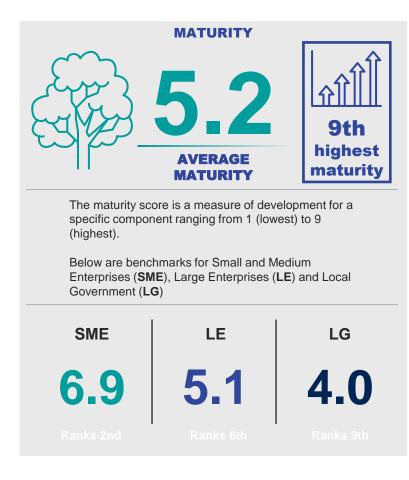


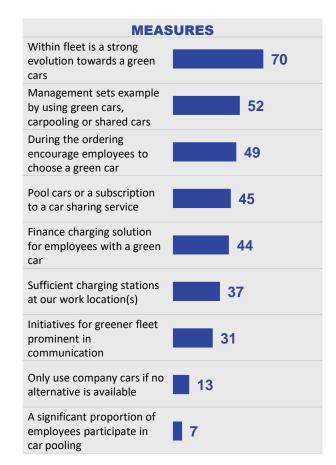
PUBLIC TRANSPORT AND MULTIMODALITY FOR COMMUTING - MEASURES





A GREEN FLEET FOR COMMUTING









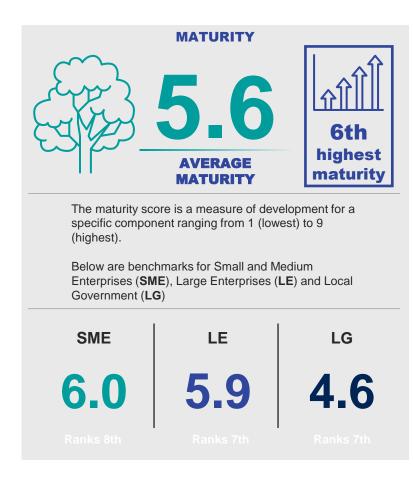


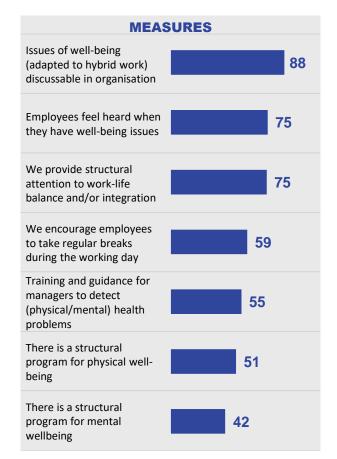
A GREEN FLEET FOR COMMUTING - MEASURES

	TOTAL	BENCHMARKS			
		SME	LE	LG	
	(n=71)	(n=16)	(n=35)	(n=20)	
Within fleet is a strong evolution towards a green cars	70	88	69	60	
Management sets example by using green cars, carpooling or shared cars	52	88	54	20	
During the ordering encourage employees to choose a green car	49	75	54	20	
Pool cars or a subscription to a car sharing service	45	56	43	40	
Finance charging solution for employees with a green car	44	69	54	5	
Sufficient charging stations at our work location(s)	37	56	31	30	
Initiatives for greener fleet prominent in communication	31	38	31	25	
Only use company cars if no alternative is available	13	19	14	5	
A significant proportion of employees participate in car pooling	7	13	9	0	



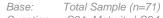
WELL-BEING IN A CONTEXT OF HYBRID WORKING











Question: Q21. Maturity | Q24. Measures | Q41. Priorities | Q31. Plans

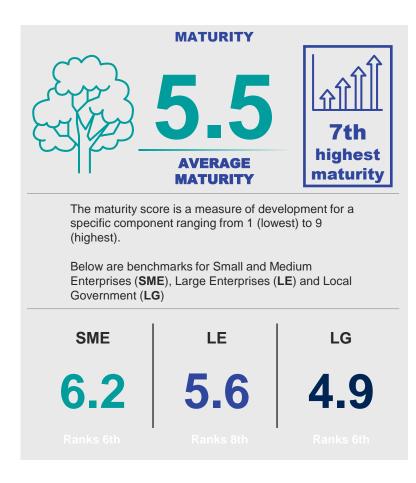


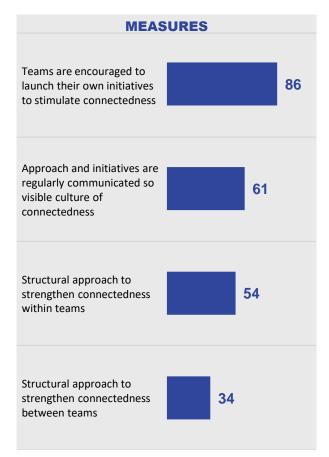
WELL-BEING IN A CONTEXT OF HYBRID WORKING - MEASURES

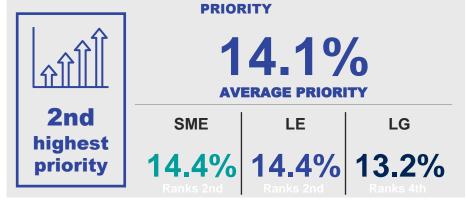


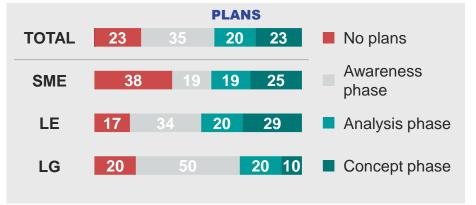


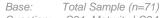
CONNECTEDNESS IN A CONTEXT OF HYBRID WORKING











Question: Q21. Maturity | Q24. Measures | Q41. Priorities | Q31. Plans

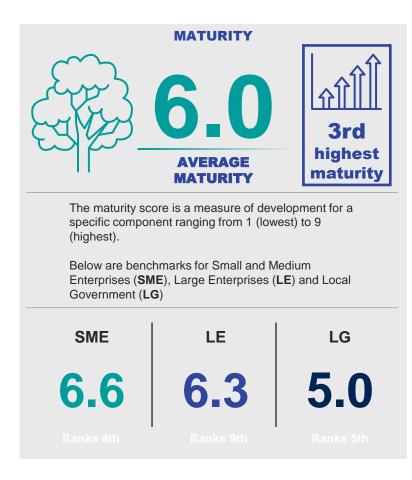


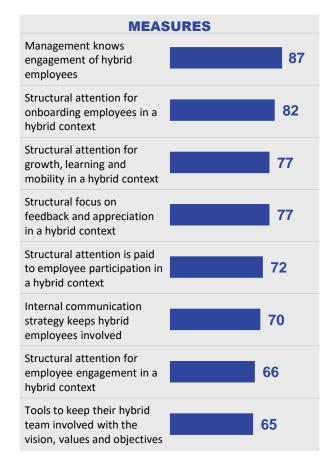
WELL-BEING IN A CONTEXT OF HYBRID WORKING - MEASURES





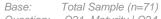
INVOLVEMENT IN A CONTEXT OF HYBRID WORKING



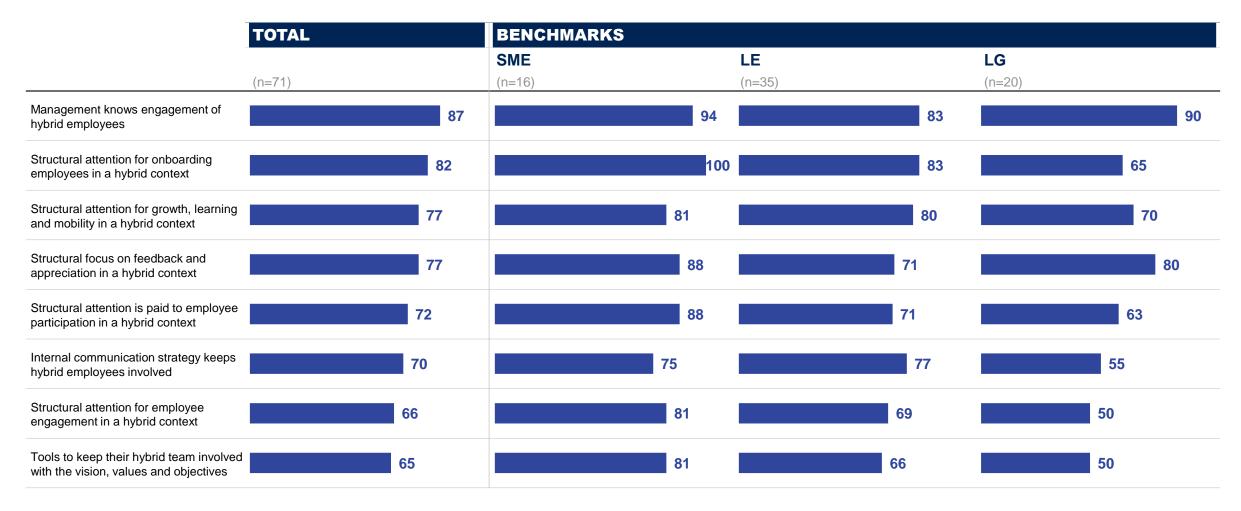








INVOLVEMENT IN A CONTEXT OF HYBRID WORKING- MEASURES





EVOLUTIONS VS. LAST YEAR

3. Results

In this section only the organisations that participated both in 2021 and 2022 are included.



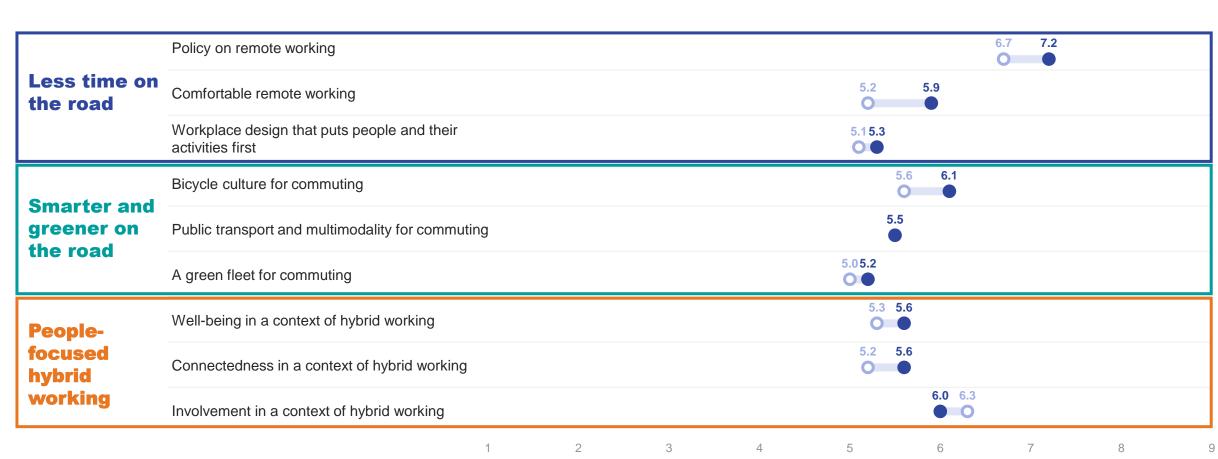


EVOLUTION OF THE MATURITY

There is a positive evolution on most components. Especially on the 'Less time on the road' topic and the competent bicycle culture. On the involvement on hybrid working there is a slight step back. But that might be due to the difficulties due to mandatory remote working during the corona crisis.

WAVE 1

WAVE 2





EVOLUTION OF THE PLANS





LESS TIME ON THE ROAD

The participants made significant steps forward in terms of maturity. Especially on the policy on remote working and enabling employees to do this comfortably.

POLICY ON REMOTE WORKING

All measures see an increase in adoption. But the largest step forward is on making clear and formal agreements to make remote working run smoothly.

This cannot be seen separately form the impact the corona crisis had on how organisations work: the participating organisations really acted on the situation at hand by implementing adequate policies.

COMFORTABLE REMOTE WORKING

The participants feel they made a step forward: Virtually all organisations ensure that their employees have the tools to communicate digitally.

When it comes to providing accessories to comfortably work remotely, most participating organisations choose to hand those out themselves (in stead of letting employees choose themselves via a flexible income).

WORKPLACE DESIGN THAT PUTS PEOPLE AND THEIR ACTIVITIES FIRST

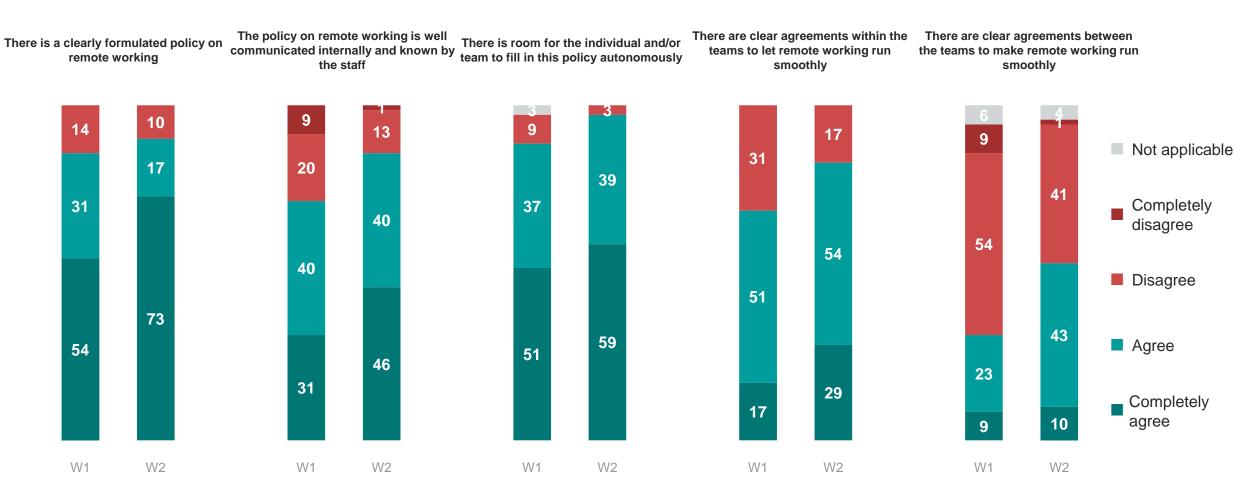
The maturity is largely the same as last year.

It appears that the participants have focused on improving the measures that were already in place (in stead of implementing additional measures).



EVOLUTION ON MEASURES TAKEN - POLICY ON REMOTE WORKING

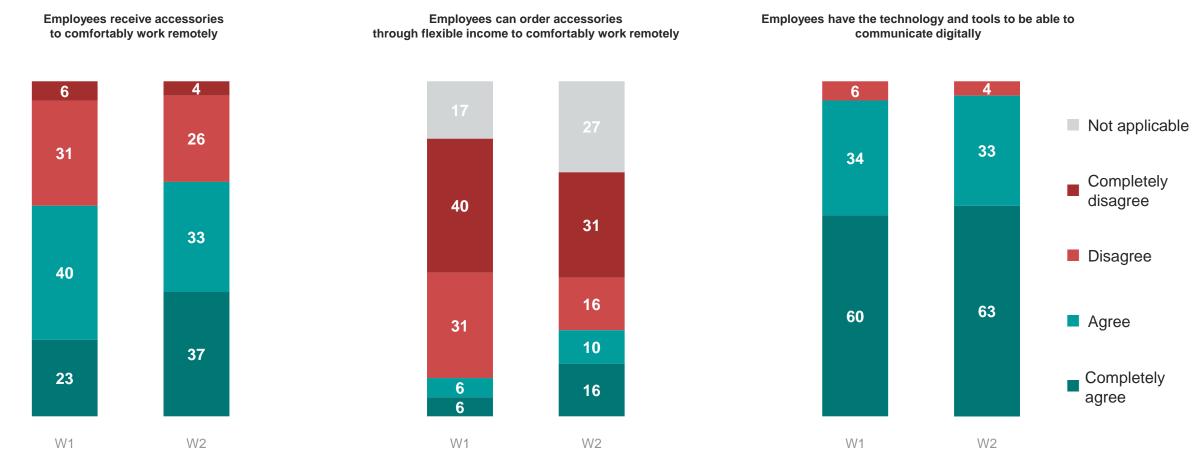
All measures see an increase in adoption. But the largest step forward is on making clear and formal agreements to make remote working run smoothly.





EVOLUTION ON MEASURES TAKEN - COMFORTABLE REMOTE WORKING

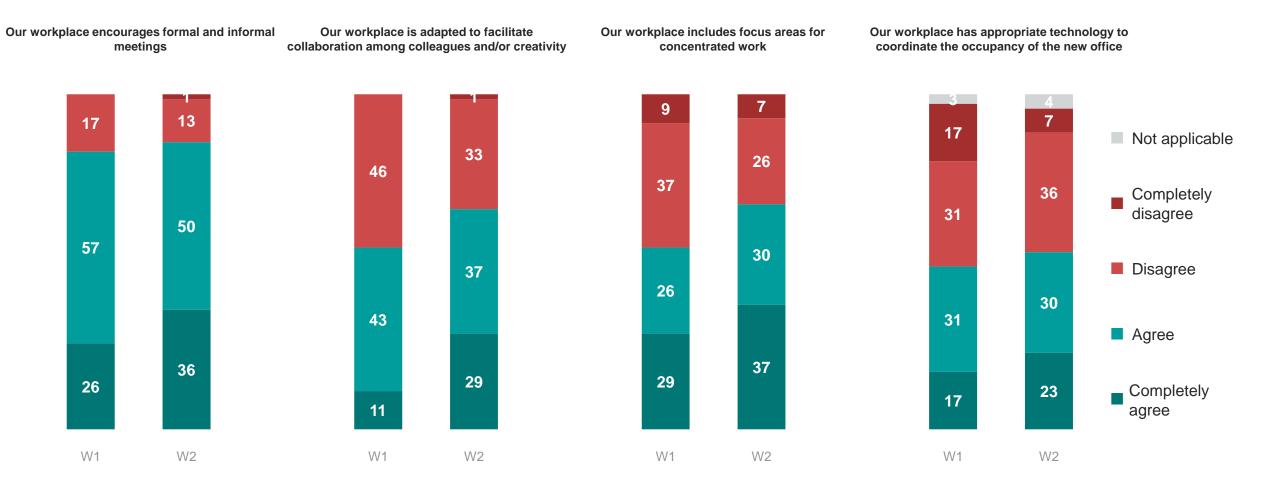
Virtually all organisations make sure employees have the tools to communicate digitally. When it comes to providing accessories to comfortably work remotely, most participating organisations choose to hand those out themselves.





EVOLUTION ON MEASURES TAKEN - WORKPLACE DESIGN THAT PUTS PEOPLE AND THEIR ACTIVITIES FIRST

Most progress has been on improving the measures that were already in place (moving from agree to completely agree).





SMARTER AND GREENER ON THE ROAD

Of the three components within this topic, the biggest progress has been made on the bicycle culture. The maturity of the other two components is stable compared to 2021.

BICYCLE CULTURE FOR COMMUTING

Strong step forward in terms of maturity for the participants. This also shows in the adoption of measures taken:

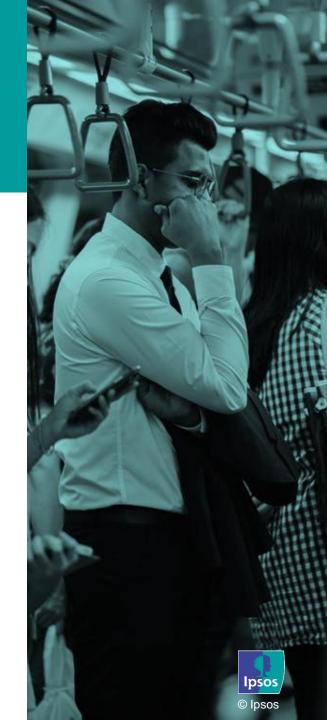
- Financially: more participants offer the max. bicycle allowance and support buying bikes (discount or leasing)
- Practically: more participants offer changing rooms and places to park bikes

PUBLIC TRANSPORT AND MULTIMODALITY FOR COMMUTING

No change in maturity, and this is also reflected in the measures: There are only some minor fluctuations in terms of the measures implemented.

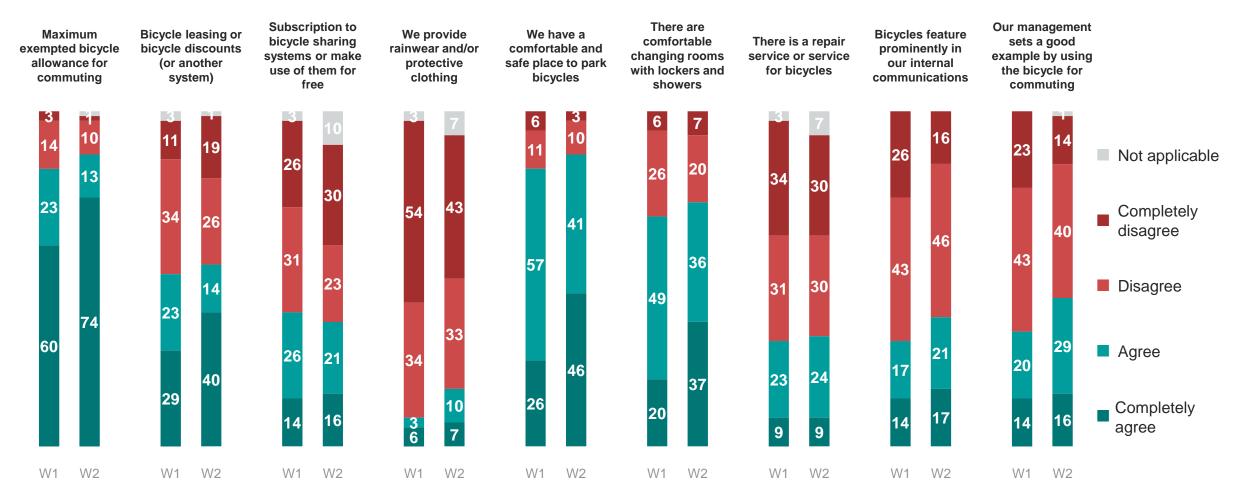
A GREEN FLEET FOR COMMUTING

There is a clear move towards a larger share of green cars. But on the other measures there is a statusquo compared to last year.



EVOLUTION ON MEASURES TAKEN – BICYCLE CULTURE FOR COMMUTING

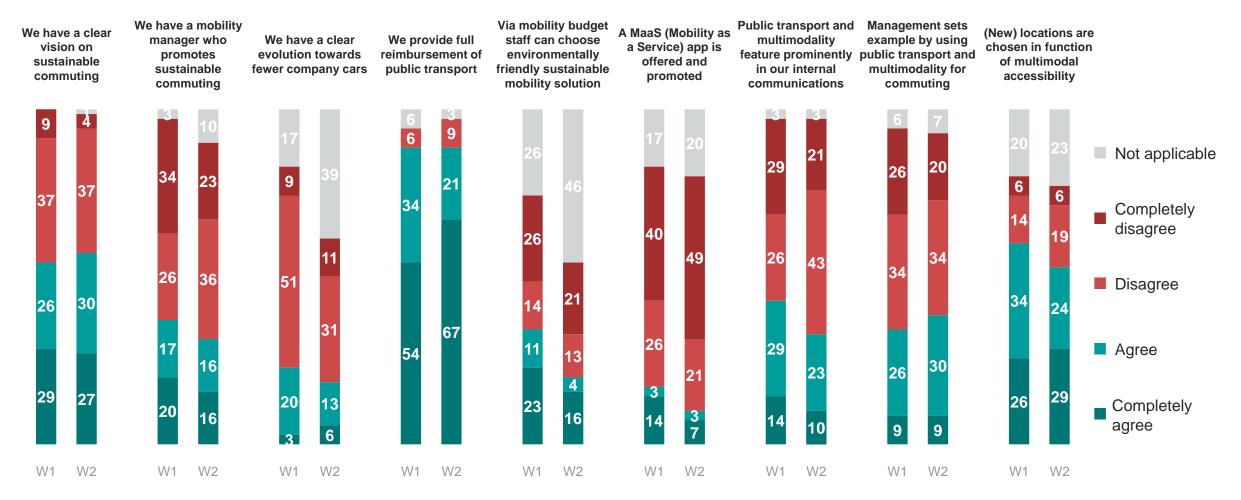
Participants stepped up their game both financially (more participants offer the max. bicycle allowance and support buying bikes) and practically (more participants offer changing rooms and places to park bikes).





EVOLUTION ON MEASURES TAKEN - PUBLIC TRANSPORT AND MULTIMODALITY FOR COMMUTING

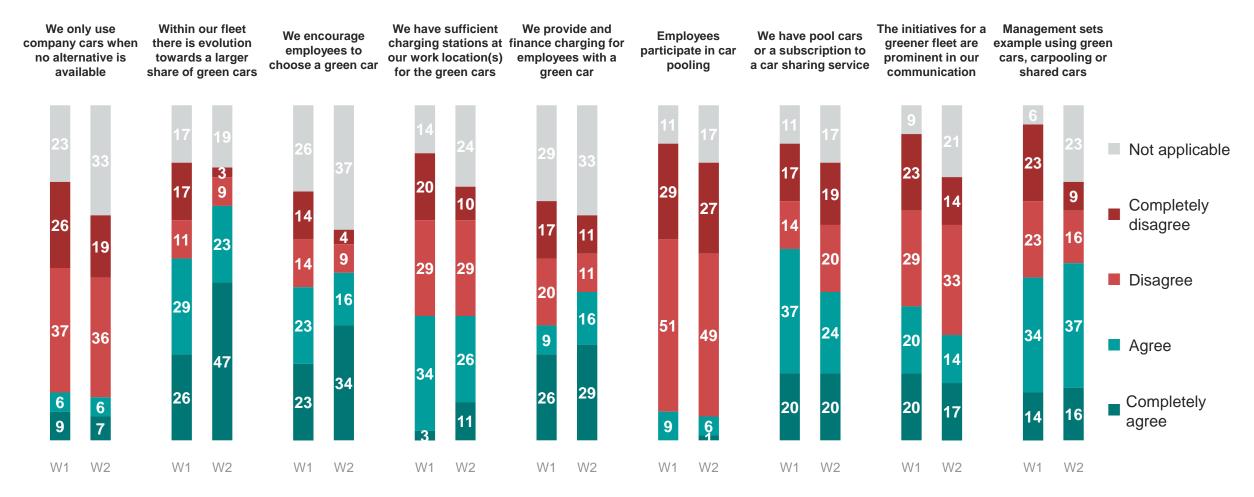
There are only some minor fluctuations in terms of the measures implemented on this component.





EVOLUTION ON MEASURES TAKEN - A GREEN FLEET FOR COMMUTING

There is a clear move towards a larger share of green cars. But on the other measures there is a status-quo compared to last year.





PEOPLE-FOCUSED HYBRID WORKING

The participants are moving in the right direction, but at a lower pace than (for example) working remotely. It has to be noted that these components suffer from the pandemic as this affects the way people work and interact with colleagues.

WELL-BEING IN A CONTEXT OF HYBRID WORKING

Compared to last year there are more participants who are providing structural attention to the work-life balance and implement a program for mental health. But there is still room for improvement (especially for the latter).

CONNECTEDNESS IN A CONTEXT OF HYBRID WORKING

The measures taken are largely **consistent with last year**. Initiatives regarding this component have suffered from government restrictions due to the corona crisis.

INVOLVEMENT IN A CONTEXT OF HYBRID WORKING

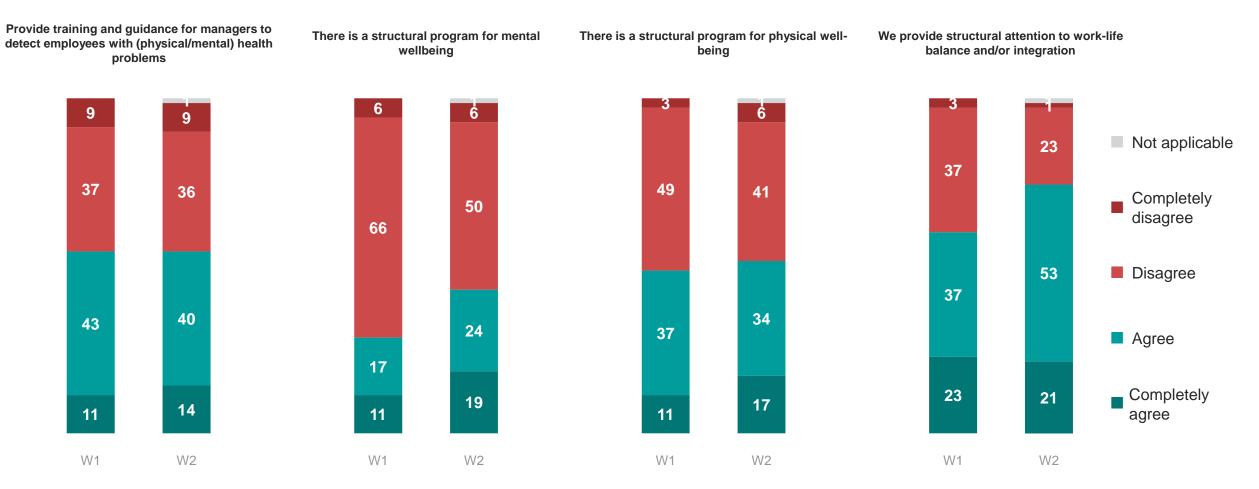
There is a **slight step back** of the maturity of this component.

It does appear that the participants are aware of this: these topics get a relatively higher priority to work on (see later).



EVOLUTION ON MEASURES TAKEN – WELL-BEING IN A CONTEXT OF HYBRID WORKING

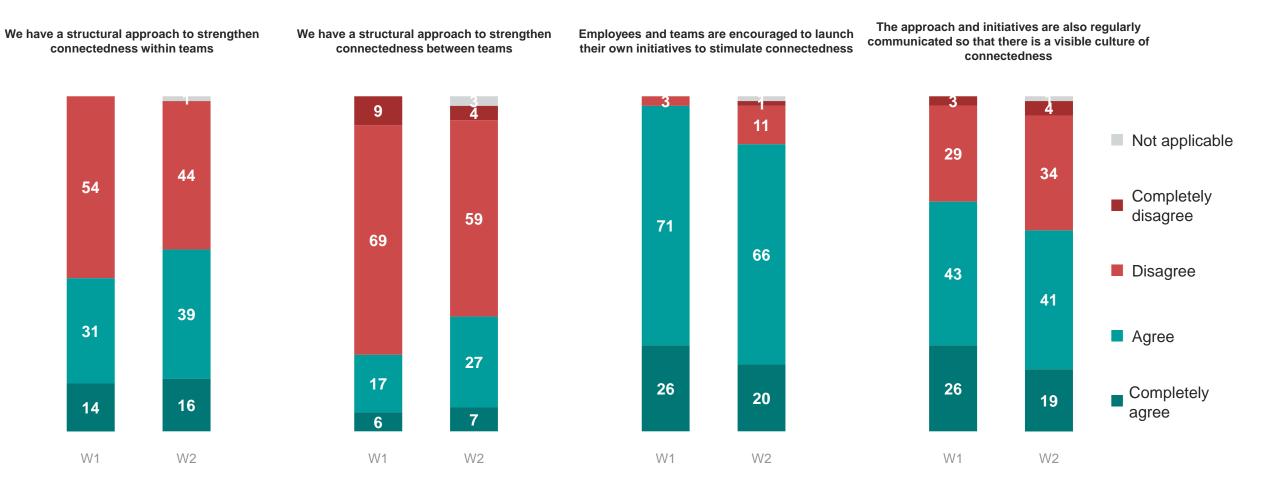
Compared to last year there are more participants who are providing structural attention to the work-life balance and implement a program for mental health. But there is still room for improvement (especially for the latter).





EVOLUTION ON MEASURES TAKEN - CONNECTEDNESS IN A CONTEXT OF HYBRID WORKING

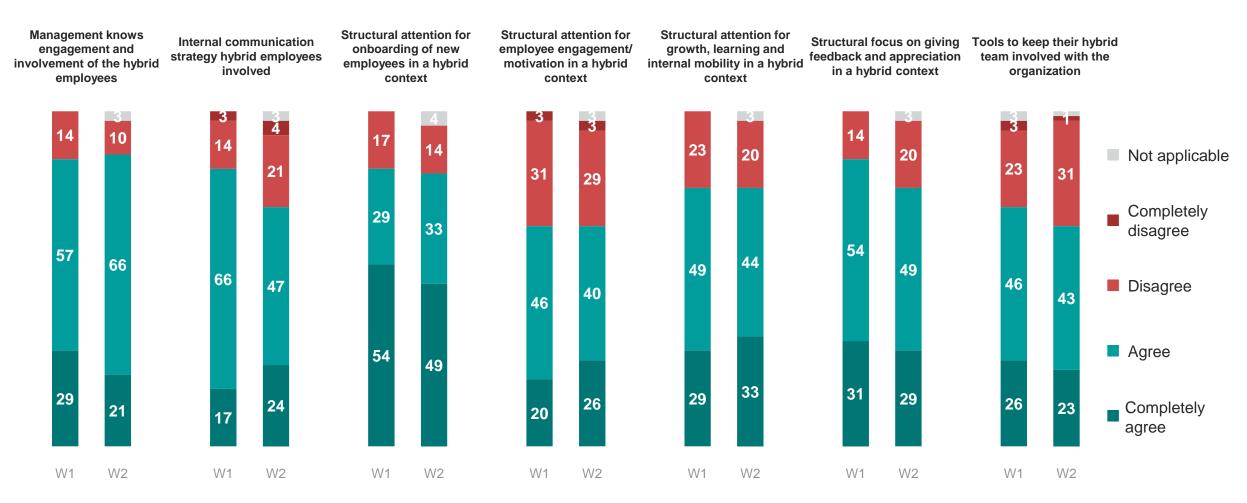
The measures taken are largely consistent with last year. Initiatives regarding this component have suffered from government restrictions due to the corona crisis.





EVOLUTION ON MEASURES TAKEN - INVOLVEMENT IN A CONTEXT OF HYBRID WORKING

The adoption of some of the measures has decreased compared to last year.





BE SURE. MOVE FASTER.

GAME CHANGERS



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