



Leesman[®]

EBOOK

POWERING HYBRID WORK 2023

New Insights into Modern Work, Workplaces and Networks

Survey Results from 75K Global Workers



INTRODUCTION

Macro trends of mobility and digital transformation have impacted every area of business, including how, where, and when work gets done. While most have adapted to working from anywhere and the accelerating speed of business, recently the world has seen unprecedented, paradigm-shifting changes resulting from the pandemic. Now that the dust has settled, organizations and their teams must chart their best path forward.

This Aruba and Leesman eBook provides insights into modern work, workplaces, and networks, so organizations can make informed decisions to better adapt and thrive. Aruba teamed up with Leesman to create the original research report “The Future of Work and the Workplace. Insights from Leesman Global Survey”, [available here](#). This eBook summarizes and builds upon the key findings and conclusions in the report.

These data-driven insights are derived from extensive Leesman worker and workplace surveys across a wide range of companies worldwide. They provide worker perspectives, important technological and human factors in the hybrid workplace, and management views of office deployment going forward. The report also delivers insights from Aruba’s two decades of leadership and innovation in delivering enterprise-class secure connectivity and working with over 500,000 customers worldwide.

Today, workplace connectivity and network modernization are two of the most critical customer use cases Aruba supports businesses with. We partner with IT and an increasing number of senior business leaders to create physical spaces that blend more seamlessly with technology.

This report explores highlights from the Leesman and Aruba whitepaper in three main categories:

- The Future of Work is **HYBRID**
- The Future of Workplaces is **ADAPTING**
- The Future of Networking is **AGILE**

*The ‘Most Recent’ data set was respondents from the Leesman Office and/or Leesman Home Working Survey, N = 75,847, Q3 2021 – Q1 2022. In addition, Leesman’s Research Team conducted further analysis of the most recent Commercial Real Estate Leaders Poll. The most recent survey, deployed in February 2022, showcased the views of 125 real estate leaders representing 105 global organizations.

ABOUT ARUBA, A HEWLETT PACKARD ENTERPRISE COMPANY

Aruba, a Hewlett Packard Enterprise company, is the global leader in secure, intelligent edge-to-cloud networking solutions that use AI to automate the network, while harnessing data to drive powerful business outcomes. With Aruba ESP (Edge Services Platform) and as-a-service options as part of the HPE GreenLake family, Aruba takes a cloud-native approach to helping customers meet their connectivity, security, and financial requirements across campus, branch, data center, and remote worker environments, covering all aspects of wired, wireless LAN, and wide area networking (WAN).

<https://www.arubanetworks.com>

ABOUT LEESMAN

Leesman is the world leader in measuring and analyzing the experiences of employees in their places of work. Through a series of assessment tools, Leesman captures employee sentiments on how effectively the work environments they use support them. By rating organizations' ability to support employees in the home and in the office, performance can then be benchmarked against the world's largest database of its kind. Their data and insight equips executives at all levels to make informed, forward-thinking decisions that allow them to mitigate risk, plan for the future, and benefit from great employee workplace experience.

<https://www.leesmanindex.com>





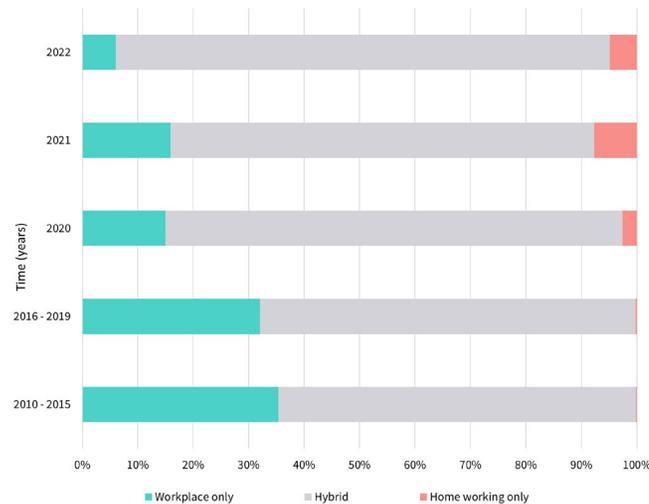
THE FUTURE OF WORK IS HYBRID

HOW, WHEN, and WHERE we work has fundamentally changed WORLDWIDE

Despite common beliefs, working from anywhere and hybrid work are not new concepts. The number of workers self-classifying as hybrid varies little pre- and post-pandemic. However, the primary work location and acceptability of hybrid work have undergone major changes, from primarily office-based pre-pandemic to primarily home or hybrid-based post-pandemic.

Figure 6: Hybrid working over time

Leesman office respondents, data as of Q1 2022 | 2010 - 2015 N = 133,090, 2016 - 2019 N = 571,235, 2020 N = 97,045, 2021 N = 79,866 and 2022 N = 26,011



Leesman defines hybrid work as a typical week in which workers spend 5% or more of their time in more than one location.

Hybrid work was NOT born during the COVID era:

>60% of workers identified as hybrid in 2010-2019

Workplace-only work decreased by

5x when comparing pre- and post-pandemic levels (2016-2019 32%; 2022 6%)

Home-only working increased by:

26x in 2022 (5%) vs 2016-2019 (0.2%)



Hybrid working most embraced by:

- #1 Media & Entertainment
- #2 Construction & Civil Engineering



Workplace-only work most embraced by:

- #1 Retail
- #2 Legal & Law



Home-only working most embraced by:

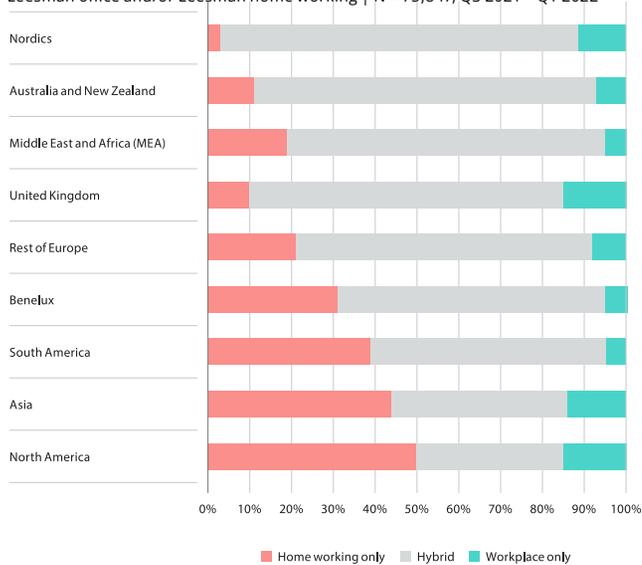
- #1 Technology
- #2 Architecture & Real Estate



More hybrid work happens at home because it supports the following activities better than the office:

- 1) Individual focused work (15 percentage points)
- 2) Video and audio conferencing (20 percentage points)
- 3) Creative thinking (25 percentage points)

Figure 11: Hybrid working by region
Leesman office and/or Leesman home working | N = 75,847, Q3 2021 - Q1 2022



Globally:



Home working most embraced by **Americas** and **Asia**

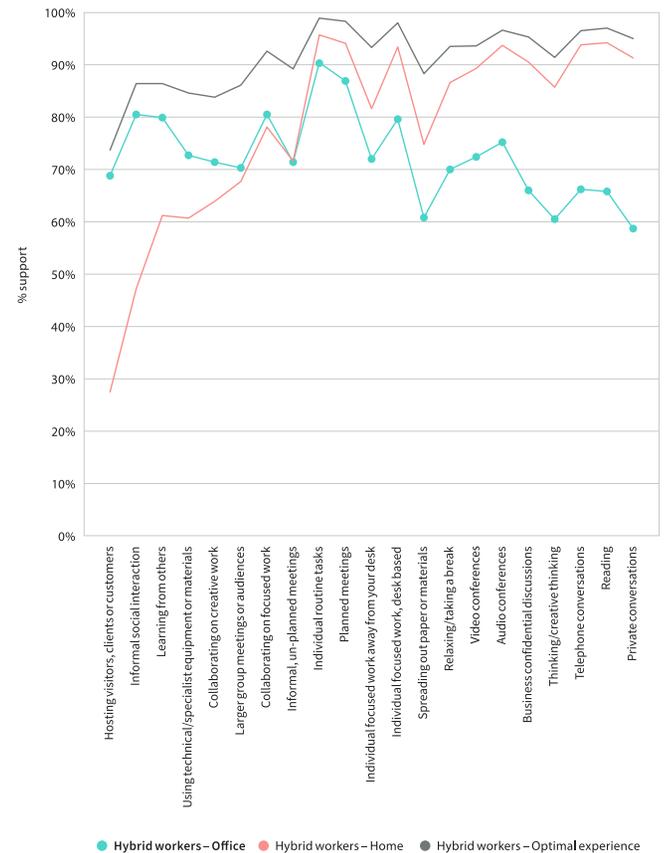


Hybrid work most embraced by **EMEA**

HOWEVER - hybrid work including both home and office is the OPTIMAL approach for ALL 21 key work activities.

Survey results indicate that, no matter the activity, hybrid workers are better supported across ALL 21 key work activities, especially when given the flexibility to choose the optimal hybrid work setting to perform given tasks.

Figure 7: Hybrid optimal – levels of support
Leesman Office and/or Leesman Home Working | N = 75,847, Q3 2021 - Q1 2022





THE FUTURE OF THE WORKPLACE IS ADAPTING

Organizations are making strategic investments in workplace design and strategy to accommodate hybrid working going forward. Eighty-three percent of organizations made workplace changes in the last 12 months, and 94% of real estate leaders are planning for less overall square footage and/or changes in how they use offices and workspaces.

Hybrid work is here to stay according to 125 corporate real estate leaders across 105 global organizations.

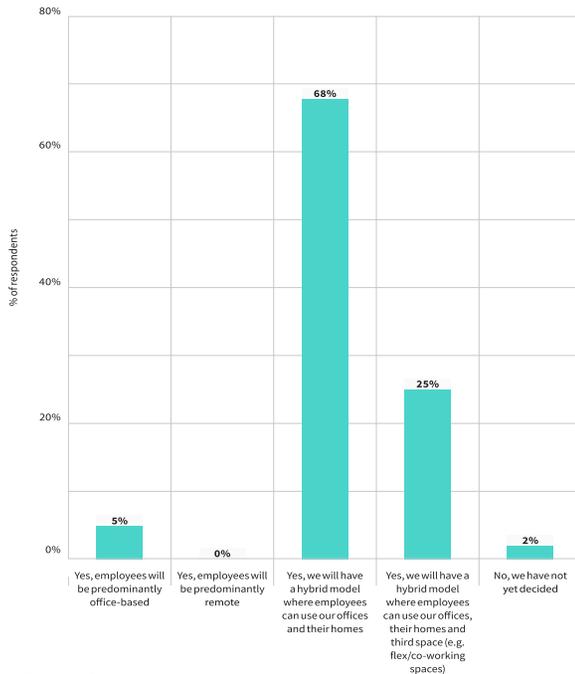


Figure 2: Has your organisation made a decision about where employees will be working post COVID?

Leesman Corporate Real Estate Leaders Poll 2022 | N = 125

Changes and/or reductions to office space are real

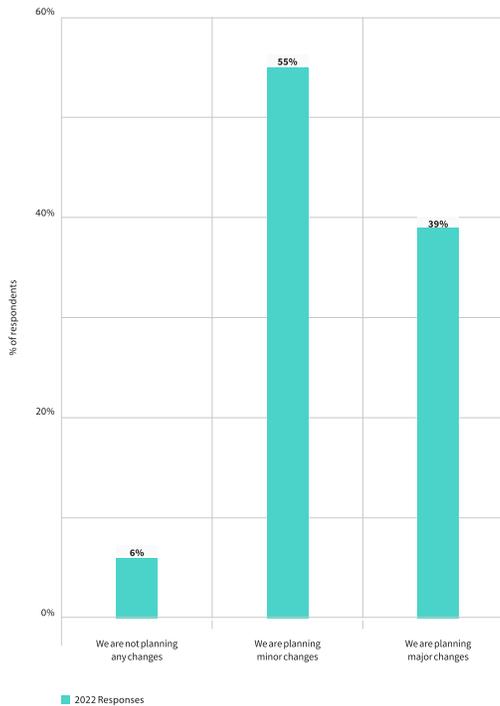


Figure 4: To what extent are you planning to make physical changes to your workplaces to support employees' needs post COVID? Please select the option applicable to the majority of your workplaces.

Leesman Corporate Real Estate Leaders Poll 2022 | N = 125

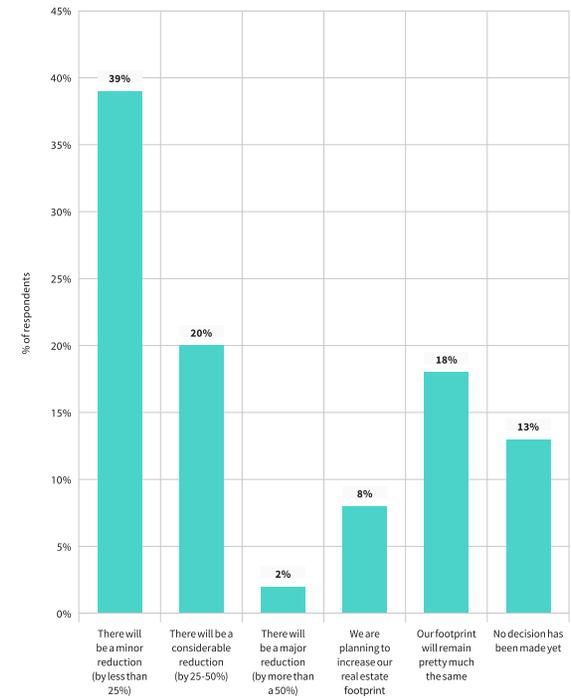


Figure 5: Overall how will your real estate footprint change over the next 18 months?

Leesman Corporate Real Estate Leaders Poll 2022 | N = 125

The office is becoming a hub of connection

Employees increasingly value informal social interaction and unplanned, informal meetings in the office. Despite the consensus among workplace specialists that the main purpose of the future office is to be a hub of collaboration, the Leesman data suggests the office is becoming more important as a hub of connection. Workers appear satisfied with the effectiveness of home-based collaboration.

Workers want mobility in the office

For those who work in the office at least 5% of the time, quiet rooms are rated a high priority, while large meeting rooms and desk customization are less important. These priorities may indicate areas where organizations can consider investment and disinvestment, although these priorities may change if hybrid workers spend more time in the office in the future.



Higher priority

1. Quiet rooms for working alone or in pairs
2. Wi-Fi network connectivity in the office & mobile computing equipment
3. Small meeting rooms with audio-visual
4. Desk and room booking systems
5. Parking



Lower priority

1. Personal storage, partitions, and desk customization
2. Large meeting rooms
3. Fixed desktop equipment
4. Telephone equipment
5. Onsite or nearby leisure facilities (e.g. gym)

THE FUTURE OF NETWORKING IS AGILE

Analysis of the Leesman data suggests both directly and indirectly that technology is a key driver of the hybrid experience. The following insights have a direct impact on the future design and sourcing of workplace connectivity. As a global leader in enterprise networking and advanced workplace connectivity, here are some of our thoughts.

Hybrid work home environments are here to stay

Leesman data suggests that hybrid working at home is being embraced globally and is no longer limited to the technology sector. Mobile computing and simplified remote access to work files regardless of location are highly important service features that increase productivity and agility across different work settings.

How we can help: Having a consistent Secure Access Service Edge (SASE) all the way into the home working environment through a single remotely manageable enterprise appliance provides users at home the same network experience as those in the office.

Aruba EdgeConnect Microbranch bridges the digital gap between home and office environments. Users transitioning between the home and office can experience a secure, reliable, and elevated connectivity experience.



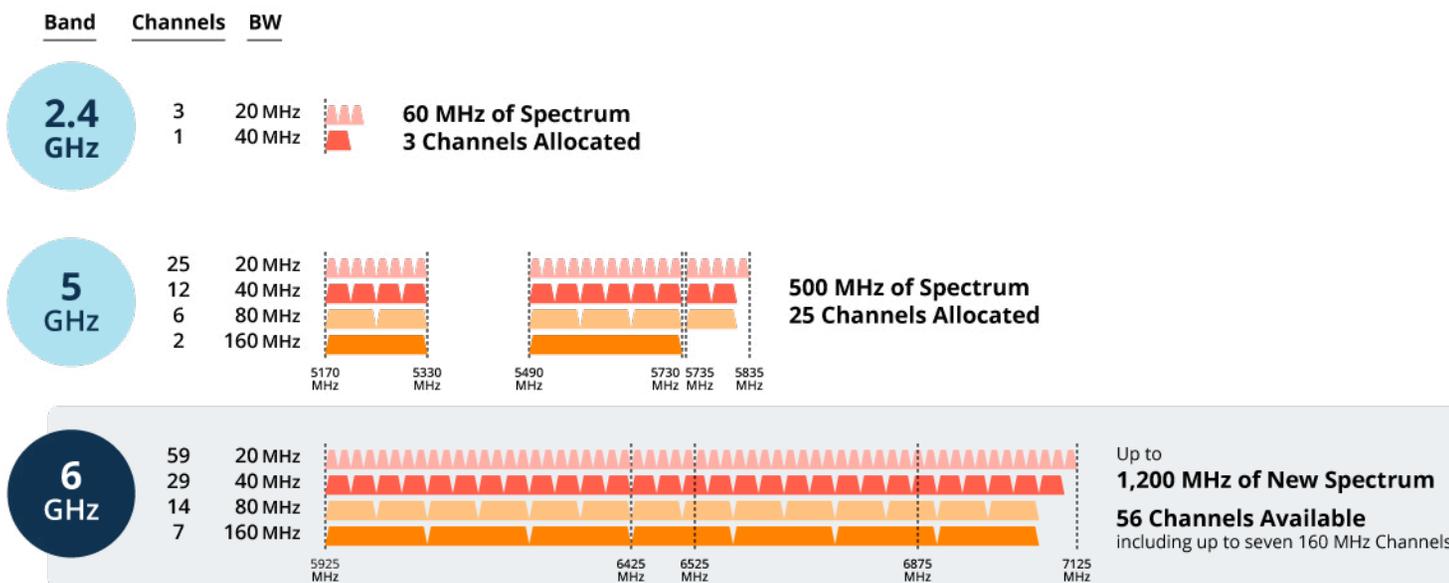


Collaboration tools are essential to keep colleagues connected across different places. Wi-Fi quality significantly impacts worker productivity and satisfaction.

Activity profile data collected from over 75,000 individuals suggests that live conversations, planned meetings, and collaboration on focused work are three of the top five most important activities conducted by users in both the office and home working environments. Significant adoption and improvements in real-time high bandwidth, low-latency video conference products such as Microsoft Teams, Zoom, and WebEx underpin these critical activities.

Wi-Fi network connectivity has a direct impact on the quality of experience of these applications and ranks as the second most important IT feature in both the office and at home. However, the satisfaction levels differ significantly with an **82% satisfaction level at home vs a 67% satisfaction level in the office**. This difference may be due to office Wi-Fi network coverage and capacity requirements to support more users and devices connected to the network.

How we can help: First introduced in 2021, Wi-Fi 6E is one of the biggest improvements in Wi-Fi technology since the early 2000s. It provides an additional 1,200 MHz of 6GHz band spectrum, resulting in lower radio interference to ensure faster and more responsive connectivity experiences for real-time high-definition video, AR/VR applications, and mobile users.



Spectrum available in the 6 GHz band varies by geography.

Aruba provides a full portfolio of industry-leading, commercial-grade **Wi-Fi 6E access points** to support indoor, outdoor, and remote workers in the office and home working environments.

Looking for a trusted Wi-Fi networking solution that your end-users can manage and purchase themselves? **Aruba InstantOn** is our affordable prosumer Wi-Fi option that provides you with fast, reliable home Wi-Fi connectivity that's also easy to use.

Office environments will change drastically in the next 18 months

Over 90% of the 125 real estate executives polled stated that their organization's real estate will change. Changes in the physical space present an ideal window to update and refresh physical amenities and supporting IT systems. While these changes provide a unique opportunity, the fluid nature of changing space doesn't necessarily align well with traditional IT capital budget planning windows.

How we can help: Driven by shorter planning cycles and network management concerns, **network as a service**, or NaaS, provides organizations with a subscription-based network technology offering. With our NaaS offering, **HPE GreenLake for Aruba**, your organization can quickly and efficiently enable secure work-from-home environments and an all-wireless office optimized for real-time collaboration. You can acquire and deploy the latest technology faster and more efficiently, ensure infrastructure is right-sized and upgrades happen when needed, rapidly deploy new use cases, and even support corporate sustainability goals.

Smaller office footprints require "smarts"

Approximately 60% of real estate respondents indicate that there will be a reduction in their real estate footprint within the next 18 months. This potential reduction in space poses challenges to managing the flow of people and their requirements. Smaller spaces require smarter, hyper-aware spaces with new desk and room booking technologies to manage space utilization more efficiently. Technologies such as IoT (occupancy sensors, smart locks), digital signage, indoor location services, booking software, and improved measurement systems place additional demands on the IT networks and application suites for end users and managers.

How we can help: Our latest generation of **Wi-Fi 6E access points** and enterprise **Ethernet switches** are IoT-ready from the start and support the latest in Bluetooth Low Energy, ZigBee, indoor GPS, and Power over Ethernet technologies.

CONCLUSION: READY FOR WHAT COMES NEXT

With fundamental changes still happening with work and the workplace, it's a good time to rethink how work gets done and add modern technology and flexibility for what comes next.

With technology underpinning modern business, IT is center stage with the charter to both support the business and champion digital transformation. An as-a-service mindset can help IT organizations accelerate the procurement, deployment, management, and optimization of technology resources as needs evolve. As-a-service solutions provide broad flexibility across a wide variety of financial, operational, and management priorities, which can change over time.

Whether organizations choose traditional, as a service, or a combination of approaches, Aruba provides a range of options and proven, market-leading technology with **HPE GreenLake for Aruba** and **Aruba ESP (Edge Services Platform)**.

Aruba's approach provides the solution, acquisition, deployment, and management flexibility to enable and empower businesses and their network teams to successfully deliver outcomes (rather than technology), within existing budget and IT resources.

With a combination of best-in-class technology and the customer choice of traditional or NaaS acquisition options, agile NaaS helps IT support the day-to-day business and have the scale and resources to deliver a strategic business value, creating a services-focused approach to address business opportunities and challenges.

In this increasingly digital, mobile, and data-driven age, business needs drive the network. IT infrastructure and operations must deliver agile networking, operations, and services to keep pace with the speed of business.

With Aruba, customers can deliver business outcomes faster with the ability to mix and match acquisition, deployment, and operational models with a consistent and proven unified architecture in Aruba ESP.

For more insights and information about modern, efficient, and effective IT infrastructure and operations (I&O) and better business outcomes, visit [here](#).

ADDITIONAL RESOURCES:



For more in-depth insights and information, download the full Leesman and Aruba whitepaper here:
[The Future of Work and the Workplace: Insights from Leesman Global Survey](#)



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