

Executive Summary

The super-charged shift to hybrid working has been transformational. Overnight, millions of people around the world were suddenly told to work from home. This required an almost instantaneous reimagining of the everyday, accelerating digital transformation by years.

Being thrust into the unknown left organisations very little time to prepare. Those already set up to support distributed teams certainly had a head start. But enabling optional work from home is very different to supporting an entire workforce of remote workers who need professional-grade workplace technology and devices.

Other organisations had to embark on a crash course to maintain business continuity. There was a frenzy to buy headsets and web cams, deploy collaboration tools and accelerate cloud adoption – some even had to ferry technology from offices to homes in taxis. According to <u>IDC</u>, the worldwide Unified Communications & Collaboration (UC&C) market grew 29.2% year over year and 7.1% quarter over quarter to \$13.1 billion in the fourth quarter of 2020. Revenue growth was also up an impressive 24.9% for the full year in 2020, to \$47.2 billion ¹.

This we all know. We have lived through it. The big question now is: What next? What can we take from this experience? How will we let it shape and define the future? How can we as business leaders and employers get the best from our people moving forward?

Employees have had a glimpse of a different life. Their expectations have changed. They want to enjoy greater balance in their lives and will act with greater agency to defend their new rights. Business leaders that attempt to snap back into pre-pandemic working patterns will be swimming against the current. But enabling mass hybrid working as a permanent business change presents unique challenges.

What does the office offer that the home does not? How can you ensure equality for remote workers? Which job functions are performed better in an office or home environment?

This report analyses key issues relating to the evolution of the workplace. It includes the findings of a comprehensive survey of 7,261 hybrid workers from across Europe and the Middle East. It will examine how attitudes and behaviours are changing – looking at everything from working patterns and culture, to frustration and noise, right down to what we wear.

The report examines the evolution of workplace through five different lenses: employee wellness; equality; team camaraderie; noise and image. Poly also provides guidance and advice for business leaders on how to manage a return to the office.

Key Stats

69%

of office workers say 9-5 has been replaced by anytime working

52%

think hybrid or home workers could be discriminated against

64%

think the pandemic has caused office culture to change forever

42%

will be prone to 'noise rage' if colleagues are too loud

45%

no longer have any shame in how they look or dress

62%

of 18-24 year olds have <u>never</u> been to their current office – and of these, 72 % said the thought of going into the office was keeping them up at night

Wellness, Work-life Balance & the Gift of Time

It may be clichéd, but a business is only as strong as its people. Despite digital transformation, businesses remain human driven at their core. Customers, leaders and employees. These are the beating heart of commerce.

Ask any employer: retaining and recruiting is a top 3 challenge facing modern businesses. And they have have even more reason than usual to worry. "The Great Resignation" – a term coined by professor Anthony Klotz in reference to the surge in resignations in the wake of the pandemic – is a reality. While many held onto positions in the midst of the pandemic, people have now had time to reassess their lives and reevaluate what is important to them, leading many to head for the door. Fighting against this wave will not be easy.

Creating working environments where people feel valued, included, and heard is vital. As is giving people the time and flexibility to have a life beyond work. Hybrid working is no longer a nice to have. It's become essential in a competitive market with a talent shortage.

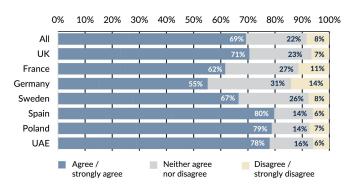
Recent research has shown that employees in Germany had the most COVID-19-related resignations in Europe, with 6.0% of workers leaving their job. This was followed by the United Kingdom (4.7%), the Netherlands (2.9%), and France (2.3%). Further research has suggested 41% of the global workforce is likely to consider leaving their current employer within the next year. This number is even higher for Gen Z (54%). At the same time, 46% are planning to make a major pivot or career transition. Added to this, stress and burnout is an ever-growing crisis – an issue that has again been exacerbated by the emotional and mental strain of the pandemic.

The past 18 months has given some workers the gift of time. They have been able to achieve a better work-life balance – a term first used by the Women's Liberation Movement in the 1980s when advocating flexible schedules and maternity leave for women. In the wake of the pandemic, we could see a similar and more encompassing worker revolt as people demand more flexibility.

This idea of work-life balance has further evolved with the emergence of 'anytime working', which allows people to alter their traditional working patterns to wrap work around their lives. Whether it's having the time to put the washing on, do the school run, or do some exercise, people have greater flexibility.

According to our findings, 69% of respondents said that their 9-5 has been replaced with anytime working (see fig. 1)². Not to be confused with 'always on' working, anytime workers may pick up work in the evening to accommodate more flexibility in the daytime. This gives people greater autonomy – within reason – over when they work. For example, when focus is a key requisite, people may prefer times when no one else is awake to distract them. If implemented correctly, with the right safeguards and education, anytime working can contribute to a happier and more productive workforce.

Figure 1 - To what extent do you agree or disagree that traditional 9-5 is now dead, and has been replaced with anytime working?



'The past 18 months has given some workers the gift of time. They have been better able to achieve a better work-life balance.'

Indeed, having more autonomy over their time has clearly been a major benefit for many. Avoiding lengthy commutes, achieving a better work-life balance and feeling less stressed were the top three benefits of hybrid working, according to respondents – quickly followed by saving money on commuting (see fig.

Figure 2 - 'Top 5 benefits of working from home'

- 1. Spending less time commuting
- 2. Having a better work-life balance
- 3. Feeling less stressed
- 4. Spending less money commuting
- 5. Having more personal time

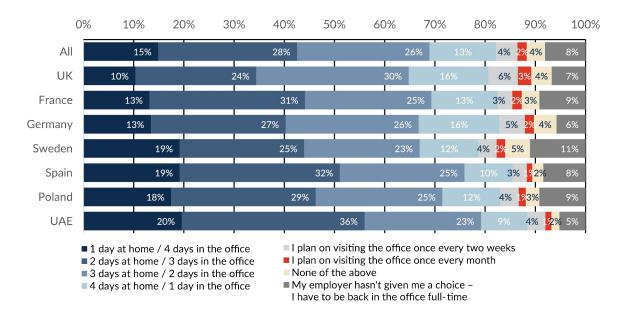
Figure 3 - 'Top 5 things people will miss about working from home'

- 1. Increased personal time
- 2. Finishing on time
- 3. Wearing more casual attire
- 4. Family time
- 5. Having a lie in

2)³. When thinking about what people would miss about working from home, people highlighted the things they were now able to do with this added time – such as having lie ins, time with family and finishing on time (see fig. 3)⁴.

These benefits can have a significant impact on a person's emotional well-being. By giving people some control, they feel less chained to a desk and more willing to give back. This will help employers to get the most out of their people and drive the business forward. It's no wonder then that 82% intend to spend at least one day a week working from home in the future, with 54% planning to split their time evenly between office and home (see fig. 4)⁵.

Figure 4 - Thinking about returning to the office and your future working patterns, which of the following best describes how much time do you intend to spend working in the office or at home?



Key Take Aways



Hybrid working is here to stay: Deploy the right technology to ensure meeting quality Anytime working will replace the 9-5: Trust your people, allow for balance and be flexible

Equality & Future of Work

Not all employees have enjoyed greater freedom and flexibility while working from home though. Some businesses were prepared for the shift, but many were not. As a result, working from home has not always been smoothly implemented. This has left many workers feeling frustrated.

When looking at the main drawbacks of working from home, having fun with colleagues was an area that has been hard to replicate in a remote environment. Of more concern though, in contrast to those that have felt working from home has given the gift of time, many are feeling put upon. Being expected to work outside of their agreed hours was listed as the second biggest drawback of working from home (see fig. 5)⁶. Further to this, 58% felt that the rise in remote working has meant they are always on and always available, leaving them unable to relax or switch off from work (see fig. 6)⁷.

Figure 5 -

'Top 5 drawbacks of working from home'

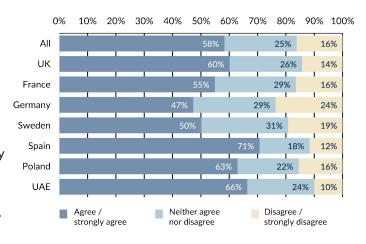
- 1. Lack of banter with colleagues
- 2. Being expected to work outside of hours
- 3. Difficulty collaborating
- 4. Lack of IT support
- 5. Lack of equipment to enable remote working

This data chimes with findings from The European Foundation for the Improvement of Living and Working Conditions (Eurofound), which found that respondents working from home during the pandemic were much more likely to regularly work in their free time⁸. This meant they were more than twice as likely to surpass the maximum of 48 working hours per week than those working on their employer's premises.

In this context, our findings are damning – over half of workers feeling unable to relax will not result in a happy workforce. As the Great Resignation sweeps the nation, it is likely to be these burned out people who are most likely to walk out the door. If hybrid working is something your organisation is considering in the future, then there needs to be clear guidelines to prevent employee burnout.

Employees also noted frustrations at not being given the proper tools to work effectively from home. Difficulty collaborating, lack of IT support and lack of equipment to enable home working (see fig. 5) are likely the result of the hasty nature in which people had to make a switch to a new operating model. In the short-term, such mistakes are forgivable. For hybrid working to be a long-term reality for any business, then equality of experience for those in and out of the office will be essential. This means having the proper tools and supporting your workers to perform at their best from wherever they are.

Figure 6 - To what extent do you agree or disagree that the rise in remote working now means you are always on and always available, leaving you unable to relax or switch off from work?



'Being expected to work outside of their hours was listed as the second biggest drawback of working from home.'

Unfortunately, remote working has left some workers worrying their future careers could be in jeopardy too:

- 43% were concerned that working remotely would have a negative impact on their development and career progression (see fig. 7)⁹ a figure that rose to 52% for those aged 16-24.
- Nearly half (47%) said they were worried about missing out on learning from peers and seniors – a number which rose to 70% in UAE (see fig. 8)¹⁰.
- 52% think hybrid or home workers could be discriminated against or treated differently to employees in the office full-time (see fig. 9)¹¹. Here, there were some marked regional differences, with the number rising to 63% in UAE and 57% in the UK, compared to 38% in Germany.

These figures are far too high. With hybrid working set to become a long-term reality for businesses we cannot allow a two-tier system to emerge. Many worry that hybrid and home working could even be used as an excuse to pay some workers less. For example, a recent survey of over 22,700 companies suggests 11% of companies will discontinue London weighting for London workers who continue to work from home¹². Many commentators have suggested that this should be the case for hybrid workers also.

It has also been suggested that women could be more likely to choose to work from home long-term to accommodate for family, which could put them at a disadvantage to their male peers as they will get less 'face time' with their managers. This has the potential to widen the gender pay gap even further.

It is essential that businesses find ways to ensure learnings from peers are enabled, and that career progression is protected to avoid discrimination and exclusion. Yet to eliminate bias and bolster diversity and inclusion, businesses must provide the right technology to ensure equality in the workplace.

Figure 7 - I worry that working remotely could impact my development and career progression $\,$

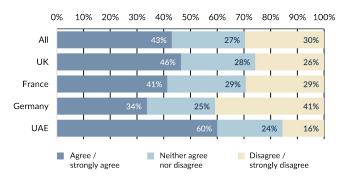


Figure 8 - I worry that working remotely will mean I miss out on learning from my peers and seniors

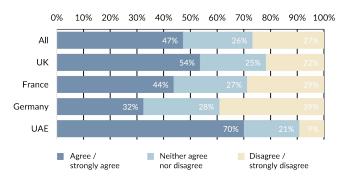
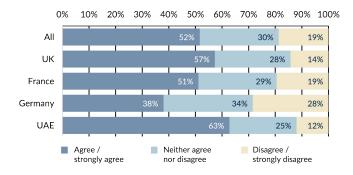


Figure 9 - To what extent do you agree or disagree that hybrid or home workers could be discriminated against, or treated differently, to employees that choose to be in the office full-time?



Key Take Aways

1

An always-on mentality is harmful: Set the right tone and define boundaries to prevent employee burn out

2

Get the best from your people: Equip workers with the tools they need to succeed from wherever they are 3

Stamp out discrimination and increase inclusion: Equal opportunity and experience for all is essential

Team Camaraderie & Ambient Learning

It is undeniable that our working lives have been transformed in the past year, but 64% of respondents think the pandemic and home working has caused work culture to change forever (see fig. 10)¹³. But opinion on this is divided. Some CEOs – particularly in the financial services sector – have come out saying remote working is not a new normal and they want employees back at their desks as soon as possible. So, what role will the office play?

For business leaders advocating a return to the office, reasons tend to focus on enabling innovation, collaboration and learning from peers. This reflects many of the concerns raised by employees too, as noted in the previous section. There was a sense from respondents that working from home may have impacted their social skills:

- Over two fifths (42%) worry that working remotely has made them less confident in their ability to communicate and work with colleagues effectively (see fig. 11)¹⁴ – a figure that rises to 53% for 18-24 year olds.
- A further 39% fear they have lost the art of small talk (see fig. 12)¹⁵, once again rising amongst younger workers to 50%.

That we feel such skills have gotten rusty during our time outside of the office goes some way to underscoring the important role that the office continues to play in our development.

When looking at what people missed about the office, there was a clear focus on person-to-person interactions and ambient learning – for example, having ad hoc work conversations or listening to colleagues talk about projects that lie outside of their area (see fig. 13)¹⁶. This suggests that many businesses still have some way to go when it comes to replicating office culture for remote workers. It also shows that many workers thrive off such interactions, underlining the need to understand the different personas in your team so that you can create the most engaging environment for them.



- 1. Office banter
- 2. Going for lunch with clients / colleagues
- 3. Office camaraderie
- 4. Having ad hoc work conversations
- Hearing colleagues talk about projects outside your area

Figure 10 - The pandemic, and increased home working, has caused work culture to change forever $\,$

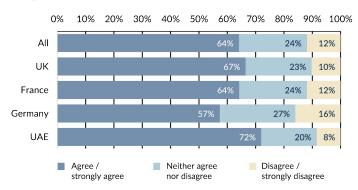


Figure 11 - I worry that working remotely has made me less confident in my abilities to communicate and work with colleagues effectively

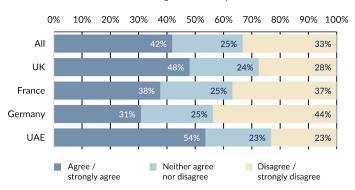
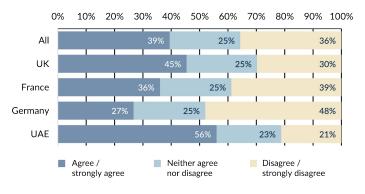


Figure 12 - I have 'lost the art of small talk' when it comes to speaking to other people as part of my job



While the things people miss about the office seem to be more people oriented, when looking at how people see themselves using the office in the future responses tended to be very practical and task oriented. For instance, getting access to the right technology, collaborating and attending meetings were the top drivers for going back into the office (see fig. 14)¹⁷. This would suggest people will be more purpose-driven when coming into the office, considering whether they come in on the basis of need as opposed to just being at their desk every day.

Whether you plan to implement hot desking, are introducing flexible hybrid working, or are asking employees to come back to the office fulltime, communication is key. Employers need to understand that employees have had a different experience over the past year, including greater autonomy. What are the incentives for people to return to the office? And how will you maintain inclusivity and culture through better use of collaborative tools, such as Teams, if hybrid working is to become a permanent shift for the business?

Figure 14 -

'Top 5 things people miss about working in the office'

- 1. Brainstorming
- 2. Attend a meeting
- 3. Better equipment and tech
- 4. Office collaboration and space
- 5. Lunch

Key Take Aways

1

Working culture has changed: The office will still play a vital role for most businesses but the way it will be used is changing 2

Shared spaces can drive innovation: Consider the personas of your people to create engaging environments that drive better outcomes

3

Enable ambient learning for all: Ensure people benefit from collaboration in and out of the office

The Rise of Noise Rage

When considering a shift back to office-based working, noise was identified as a key concern. People have gotten used to the relative peace and quiet of their home offices. The thought of being thrust back into a busy environment with competing voices and distractions could be a shock to the system. Although 34% say they are looking forward to returning to the office because of noise at home (see fig. 15)¹⁸, a figure that is markedly higher for men than women – 40% vs. 26% respectively.

When listing their concerns about returning to the office, issues relating to noise and productivity ranked very highly (see fig. 16)¹⁹. A further 61% of respondents felt they got more done while working from home during lockdown because of the peace and quiet (see fig. 17)²⁰. 56% expressed concern that noise levels in the office will make them less productive (see fig. 18)²¹. While 63% hope co-workers will be more aware of the noise they make when returning to the office (see fig. 19)²².

Two fifths (40%) of respondents have been unable to visit their new office – either because the company had moved office, or they joined during the pandemic (see fig. 20)²³ – a figure that rose to 62% of 18-24 year olds. Of those who have not yet visited their office, two thirds (66%) said the thought of visiting the office for the first time, and the potential noise levels, kept them awake at night.

Figure 17 - I feel like I got more done while working from home during lockdown because of the peace and quiet

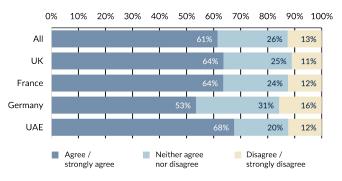


Figure 18 - I am concerned that noise levels in the office will make me less productive

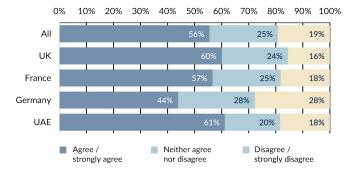


Figure 15 - I am looking forward to going back to the office because it is too noisy to work at home

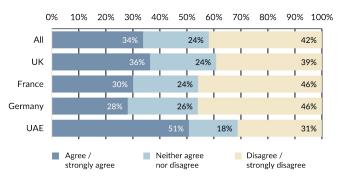


Figure 16 - 'Top 5 concerns about returning to the office'

- 1. Commuting
- 2. Noisy colleagues being a distraction
- 3. Phone calls or meetings being a distraction
- 4. Being less productive
- 5. People looking over their shoulder

Figure 19 - I hope that people will be more aware of the noise they make in the office

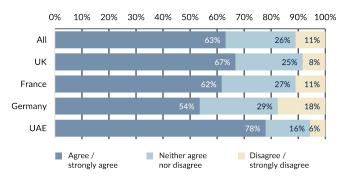
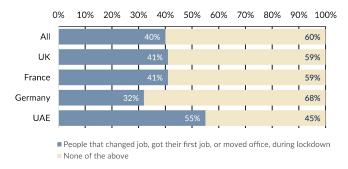


Figure 20 - People that changed job, got their first job, or moved office, during lockdown



While offices have always been noisy environments, the research suggests our tolerance levels have depleted since working from home. In fact, the issue of noise could become a point of friction between employees:

- 60% think they'll get fed up if their noisy co-workers break their concentration (see fig. 21)²⁶.
- 42% even worry they will be prone to "noise rage" if their colleagues are too loud a figure that rises to 60% in UAE and 49% in the UK, compared to just 27% in Germany (see fig. 22)²⁷.
- And 40% fear that they will be more prone to outbursts in the office now that they'll unable to mute themselves or turn their cameras off (see fig. 23)²⁶.

The combination of these factors could lead to an explosive office environment, particularly in instances where a return to office includes a shift to hot desking, where office workers do not know the people around them as well.

Ultimately, as an employer, you want to get the best out of your people – this means reducing anxiety and friction, while maximising productivity and focus. It is vital to provide employees with the right equipment to drown out any unwanted sounds. For example, noise cancelling headsets can be a good way to reduce distractions when on calls. Beyond this, organisations should look to create, where possible, dedicated quiet spaces (booths, more rooms, spacing out desks) equipped with the right technologies.

Figure 21 - I will be fed up if noisy colleagues break my concentration

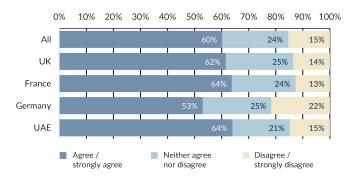


Figure 22 - I worry I will be prone to 'noise rage' if I feel my colleagues are being too loud

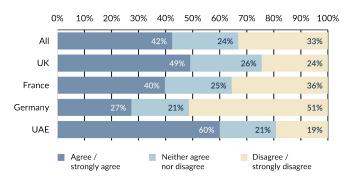
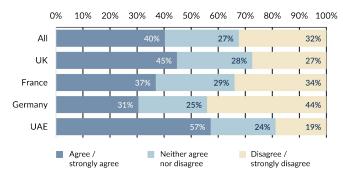


Figure 23 - I fear I will be more prone to outbursts in the office now I'm unable to mute myself or turn off my camera when with colleagues



Key Take Aways

1

Employee expectations have changed: Employers must match or better the home office experience to entice people back

2

Tempers may fray: Provide workers with clear back to work guidelines and dedicated quiet spaces to reduce friction 3

Don't let productivity suffer: Use technology and space to reduce distractions for employees and enable focus

Image & the New Work Casual

As workplace culture has changed, so have the accepted norms around what we wear. This is already having an impact on the high street – with major retailers, such as Marks & Spencer's in the UK announcing that they will no longer stock suits²⁷. The blending of the private and professional spheres has made everyone get more personal as we have been seeing inside each other's homes.

So, what happens when we go back into the 'real world'?

While many industries – technology and media in particular – adopted more casual attire some time ago, other industries, such as financial services, have always expected employees to maintain a certain standard of dress. But this may be changing, if employees have their say. Although opinions remain divided.

Over half of workers in finance (53%) admit they 'no longer have any shame in how they look or dress', compared to the average of 45% (see fig. 24)²⁸. In comparison 55% of respondents working in finance say they have become 'too used' to wearing pyjamas or tracksuit bottoms while working from home, compared to the average of 47% (see fig. 25)²⁹. Conversely, 48% of workers in finance can't wait to return to the office and start dressing in smart clothing again, compared to the average of 40% (see fig. 26)³⁰.

'Certain industries may need to consider relaxing their rules if they wish to attract and retain the best talent.'

Figure 24 - Since working from home, I no longer have any shame in how I look or dress

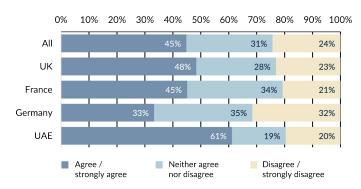


Figure 25 - I have become too used to wearing pyjamas or tracksuit bottoms while working from home

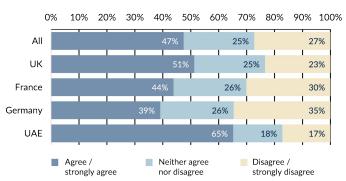
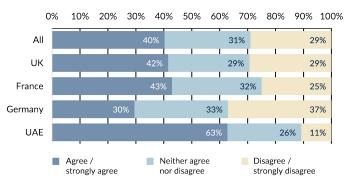


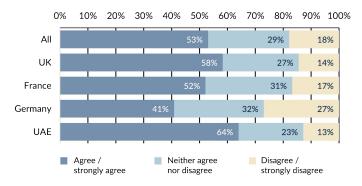
Figure 26 - I can't wait to return to the office and start dressing in smart clothing again $\label{eq:control}$



When thinking about their return to the office, many workers in finance are expecting to loosen things up compared to before the pandemic:

- 61% of workers in finance think that hybrid working has brought about the death of the suit, and that wearing suits might go away for good – 8 points higher than the average of 53% (see fig. 27)³¹.
- 52% think that they will dress more casually in the office moving forward, compared to the 46% average (see fig. 28)³².
- 50% say they dread the thought of having to wear a suit and tie or smart dress again, compared to the average of 43% (see fig. 29)³³.

Figure 27 - To what extent do you agree or disagree that hybrid working has brought about the death of the suit, and that wearing suits might go away for good?



Based on this we can expect that employees are going to push back on any arbitrary declarations that they must wear a suit, or smart clothes, into the office – particularly if their remote working colleagues are not expected to do the same.

Ultimately, business leaders need to understand the different personas and treat people as individuals, while establishing clear boundaries and communicating these. Certain industries may need to consider relaxing their rules if they wish to attract and retain the best talent.

Figure 28 - In the future when I am in the office I will dress more casually

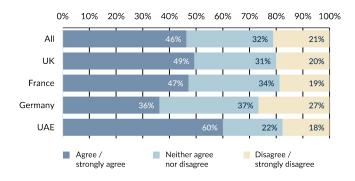
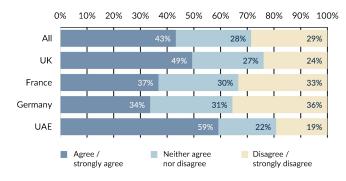


Figure 29 - I dread the thought of having to wear a suit and tie or smart dress again



Key Take Aways

Professional and personal lives have blurred: Barriers have broken down which has reduced formality

Traditional industries may be forced to change: Arbitary rules around 'image' may no

longer appeal to workers

One rule for all: Remote workers need to abide by the same rules as office workers to reduce friction

Final Thoughts – a Poly Perspective

Summary

Employees want: WORK EQUITY

- Balance
- Support
- Inclusion
- Culture

Employers must deliver: MEETING EQUALITY

- Establish etiquette
- Be flexible
- Enable collaboration
- Understand personas

The benefits of working from anywhere are clear, but it is also plagued with bias and complexity. Hallway conversations outweigh video meetings. Those who work remotely 100% of the time feel disconnected from culture. Meeting experiences are imbalanced. Anytime working is being usurped by always on working, leading to employee burn out and stress. Collaboration is in question.

While the focus for the past year may have been on business continuity, that isn't enough to inspire the workforce of the future. We must ask more of ourselves. We must ensure meeting equality through a combination of a people-first approach, supported by first-class technology and the right use of space.

Just as digital transformation raised the bar on customer experience, hybrid working has raised expectations around the employee experience. Hybrid working will change how we think and conduct business for decades to come. And just as we have seen with digital dinosaurs that have long now passed, those that don't keep up will fail.

There is no perfect solution. Those that return to fulltime office based working could face challenges recruiting and major disruptions in thre face of future lockdowns. Those that move to an entirely or partially remote workforce model could reduce costs, but face challenges maintaining culture. Those that move to a hybrid model will need to be mindful of ensuring equality for all.

However, the genie is not going back in the bottle. Those that can make the vanishing perimeter of business work for them will win. They will be in a better position to recruit and retain talent and get the best from people, while even reducing overheads. But to get there, we need to achieve a state of equity that changeable work environments cannot break.

Work equity is the opposite of one-size fits all, location-based, and 9 to 5. It does not mean forcing everyone back to the office without purpose. Equally it does not mean abandoning the office. It is a borderless, balanced order of work that feels effortless. It unites spaces to make collaboration and meeting experiences seamless. It embraces technology to power autonomy and increase participation across underrepresented groups. It brings workers together with new opportunity to provide career mobility. Work equity is the outcome of a business that champions 'work from anywhere', with a focus on parity across spaces, technology and worker needs.

Your Return to Office Roadmap

Today's workforce is more influential than ever. They demand flexibility and personalisation, but worry this choice comes with an opportunity cost. In the past, IT just installed things for them, they didn't have a choice. Now, users have an opinion. They have more demands. There is an opportunity for IT and the wider business to be more attuned to what employees want from their experience. Employees are going to drive how the office is used. Organisations need to understand employees <u>personas</u> to build technology around meetings and people, not the other way around.

Forward looking businesses will be thinking carefully about how they manage any future transition to a more permanent form of hybrid working. Arbitrarily telling staff to attend the office 9-5 may create friction if this does not serve a purpose or function. But while empowering employees to choose their own destiny may appeal to workers, business leaders need to ensure that it delivers for them too. The goal must be equality between those that are and aren't in the office, with a view to securing the greatest output. To do this organisations need to connect their People, Technology and Spaces. Here are our top recommendations for easing that transition:



Balance: Educate employees on how to best achieve a work-life balance and set parameters to help workers shift from always on to anytime working



Establish etiquette: Create clear guidelines around hours, noise and presentation to help people navigate the return to office, while ensuring the same rules apply to all to ensure total equality



Support: Ensure all participants are more empowered to speak, interact and share their best ideas with confidence



Be flexible: Take a peoplefirst approach and equip anytime workers with the right tools to conduct business from everywhere, by providing the right headsets, desk phones and personal video conferencing devices for individuals' professional use in every scenario



Inclusion: Provide a consistent, professional and seamless experience regardless of location ensuring everyone has an equal seat at the table



Employers Must Deliver



Equip meetings rooms and collaborative spaces with first-class audio video conference phones and technologies for groups of employees, while enabling the ability to connect and collaborate from anywhere



Culture: Ensure that all workers can connect, collaborate and benefit from ambient learning so they feel part of the team no matter where they are



Understand personas: Understand the needs of the different personas of today's workforce to ensure people can participate, be heard and look their best, no matter where they are

Partnering with Poly

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Poly creates balanced and personal experiences for those inside and outside of the office with professional-grade audio and video solutions. We take a people-first approach to meeting equality, knowing that workers need to be seen and heard to enjoy a sense of belonging regardless of location.

We think like film producers and build with the precision of engineers to create hardware, software, and services that reflect the importance of sound and screen in the new way we work. We frame shots to make people look their best, knowing that new opportunities are won via video. We eliminate the noise, so the focus is on you, wherever you are.

Poly delivers meeting equality to the anywhere workforce, so no one feels the inferiority of working remotely. Equally, people should not suffer lesser quality when in the office.

Poly creates personalised and balanced experiences by combining hardware, software and services to connect people, technology and spaces and transform inequitable interactions.

Methodology

The findings are based on an online omnibus survey of hybrid workers conducted by Censuswide in August 2021. This includes a total of 7,261 Hybrid workers in the UK (2,003), France (1,001), Germany (1,002), Poland (1,000) Sweden (1,005), Spain (1,000) and the UAE (250).

Please note: Some questions were only asked in UK, Germany, France and UAE, excluding Spain, Poland and Sweden. Footnotes and graphs have been included to illustrate which regions the data averages refer to for clarity.

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