



DSM USA
DES MOINES, IOWA

2023 DSM WORKFORCE TRENDS AND OCCUPANCY STUDY

GREATER DES MOINES WORKFORCE
TRENDS AND INSIGHTS



EXECUTIVE SUMMARY

In early 2023, the Greater Des Moines Partnership invested in the second administration of the DSM Workforce Trends and Occupancy Study (WTOS). This study was conducted using a representative sample of employees from 20 area organizations in the spring of 2023 to assess the ongoing evolution of the Greater Des Moines (DSM) knowledge workforce.

Being the second administration of the WTOS, researchers had the benefit of comparing 2022 and 2023 data to assess how the DSM workforce is experiencing and responding to global and national trends. **The 2023 WTOS data, along with comparisons to the 2022 study, reveal a workforce finding its footing and equilibrium along with opportunities to accelerate the economic recovery of DSM.**

The following pages present the findings of the study as well as detailed insights and actionable steps that can be taken now to address the current and future needs of our local workforce.

To understand this population in terms of their feelings, priorities and utilization patterns – both inside and outside of work – The Partnership hired Bâton Global and Reworc, global research firms based in DSM, to utilize a suite of analytical tools to assist leaders in assessing organizational work behaviors, networks, cultures and spaces. After the development of questions specifically for this study, the research group leveraged an innovative virtual interview methodology to capture the sort of robust data needed to make informed decisions. Ultimately, there were five topics investigated through the assessment:

1. **Work Behaviors:** The types of things our workers are actually doing day-to-day
2. **Mobility:** Where our workers have been working and plan to work
3. **Attributes:** The organization and surrounding environment
4. **Work Culture:** Both current and desired future states
5. **Downtown:** Workforce priorities, satisfaction and utilization

Researchers for this project have not yet come across another workforce study that has obtained this much hyper-localized and crowdsourced data addressing the future of work. Ultimately reflecting insights generated from an audience of more than 2,000 staff across 20 employers, this report confidently provides a deep understanding of both the present and future priorities of workers across the region.

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1. THE MAIN INSIGHTS

The analysis of the 2023 data uncovered several interesting insights which provide understanding into the needs of the workforce both in terms of what they seek from employers and Downtown Des Moines (DSM). These insights may inform retention and engagement for area employers as well as development, policy and programming for the region.

THE FUTURE OF WORK

Insights that inform how the workforce is responding to the evolution of work are:

- **Happier Workers** – An increase in satisfaction with their organizations
- **Total Rewards** – The make-up of the Employee Value Proposition (EVP) is shifting in response to employers' actions over the last year.
- **In It Together** – Continued growth and satisfaction with collaboration
- **Office Space Matters** – An evolving workforce requires new spaces to optimize productivity and ROI
- **Flexibility First** – Workers say flexibility to fulfill personal responsibilities is among the most critical components not only for the return to office but also their employers' EVP
- **Learning Culture** – The continued emphasis on experiential learning on the job

INSIGHTS FOR DOWNTOWN DSM

Insights that inform how the workforce interacts with the features and amenities of Downtown DSM are:

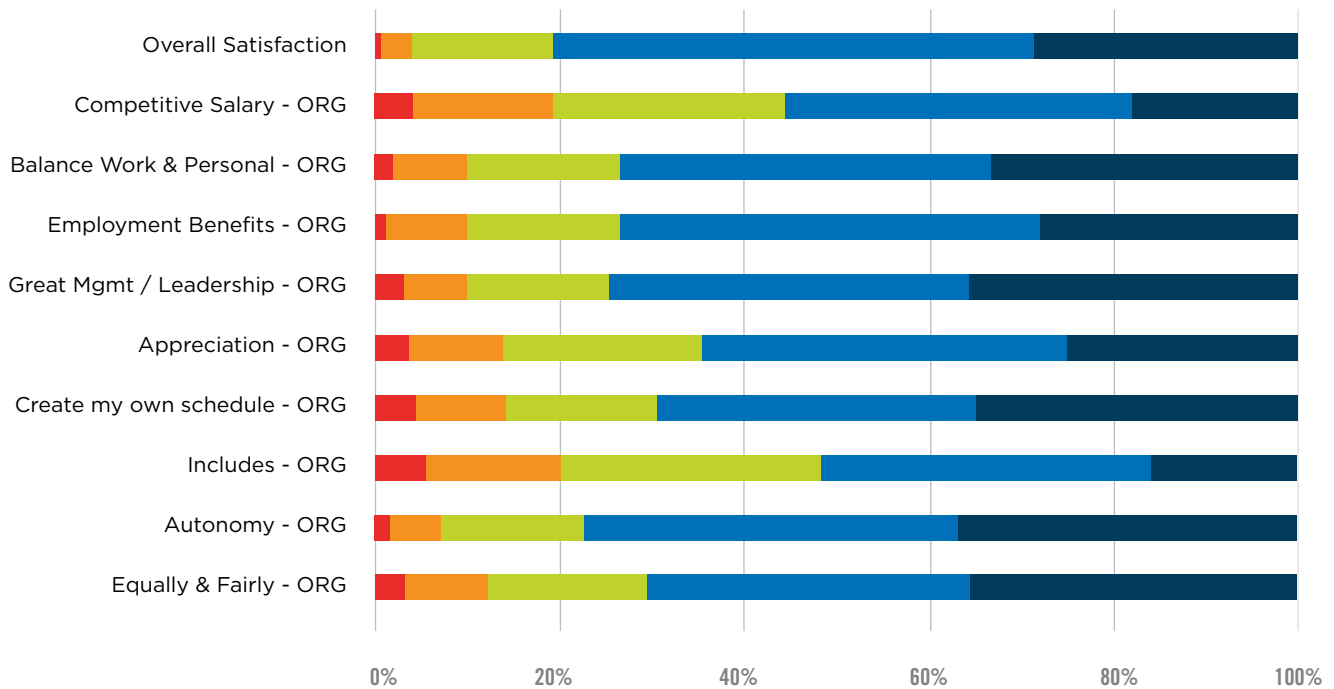
- **Safety** – A strong emphasis upon safety and security is critical to a thriving Downtown
- **Out and About** – The workforce's changing utilization of Downtown amenities
- **Keep Improving** – Data that indicates the workforce values more options for enjoying Downtown
- **The Right Balance** – An improvement in the perception that the balance between walking and driving Downtown is right for workers

2. INSIGHTS: THE FUTURE OF WORK

WTOS data provided a view of a workforce in DSM that is emerging from pandemic behavior into a new equilibrium. Compared to 2022, the workforce is more satisfied, more collaborative, more interested in learning and development, and more motivated to work at the office having refined their needs for flexibility.

HAPPIER WORKERS

Across the respondent base, overall workforce satisfaction has improved from 78% (January 2022) to 80% (February 2023).



Comparison of this hyper-local data set to other studies may be made in a few ways:

- Feb. 2023 data published by Zippia indicates that US workers indicate only 65% of workers like their jobs¹.
- Gallup's 2022 state of the Global Workplace Report indicates that in the US and Canada only 33% of workers are engaged at their job².

This recent data indicates that DSM workers are no less engaged than the national average and enjoy a higher level of satisfaction with their work.

1 https://www.zippia.com/advice/job-satisfaction-statistics/#Job_Satisfaction_by_Company::~text=Cite%20This-,Webpage,-Zippia.%20%2243%20Incredible

2 <https://www.gallup.com/394373/indicator-employee-engagement.aspx>

■ TOTAL REWARDS

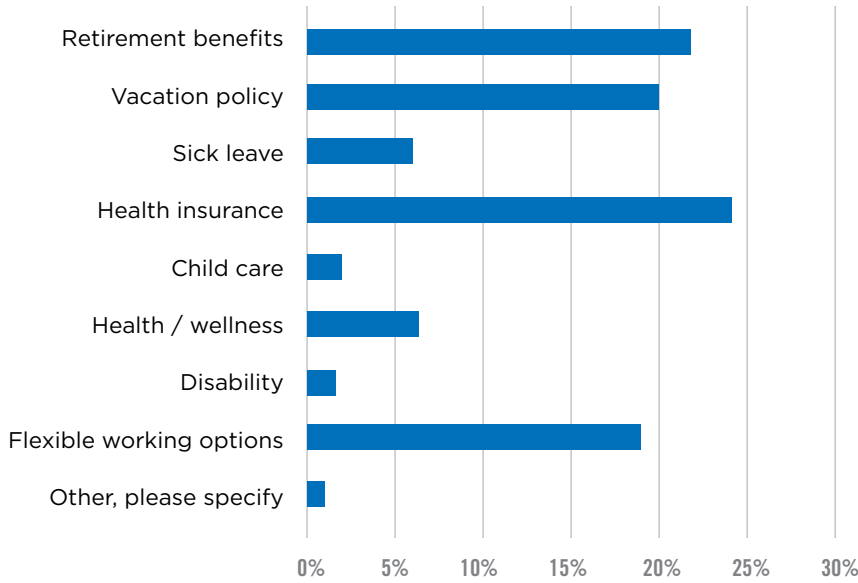
The management of compensation has undergone a transformation and is now viewed as total rewards, acknowledging that employee engagement and retention are not solely driven by monetary compensation. Employers need to prioritize a distinct set of benefits, the EVP, which represents what employees receive in exchange for their skills, capabilities and experience. In the current landscape, employees seek more than just standard pay and benefits; they are looking for meaningful rewards that will enrich their lives and promote their overall well-being. This is what will differentiate organizations in a post-pandemic world.

What matters most – the top three attributes remain the same as 2022. Competitive salary, work-life balance work and employment benefits are the three factors that, taken together, form the critical components of workforce satisfaction. Despite significant macroeconomic pressure on prices due to inflation, it appears DSM employers have responded well, as satisfaction with a competitive salary has improved from 51.5% to 55%. Work and personal balance has made similar improvements. Only the portfolio of employment benefits has eroded 5.6% from 2022, although it remains one of the attributes with very high satisfaction (73%).

Overall, satisfaction has increased across most attributes as seen in the below table. Employment benefits results reveal a shift from 2022 to 2023.

Attribute	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
Autonomy	-0.34	-1.68	-1.05	-4.7	7.77
Collaboration	0.71	-1.86	-6.19	2.05	5.29
Effective work processes	-1.73	-2.87	-0.78	0.55	4.83
Appreciation	-0.91	-3.08	-1.73	1.23	4.51
Competitive salary	-1.84	-1.26	-0.66	0.8	2.94
Equally & fairly	0.48	1.75	0.31	-5.3	2.75
Create my own schedule	0.02	0.57	1.05	-3.41	1.76
Appropriate accountability	-1.56	-2.16	0.16	2.41	1.15
Includes	0.58	-1.78	-0.29	0.56	0.92
Balance work & personal	-0.68	-0.42	-0.33	0.68	0.74
Career growth	0	0	0	0	0
Great management/leadership	-0.53	-0.97	0.77	1.62	-0.89
Learning & development	0.44	-0.52	-0.26	3.55	-3.22
Employment benefits	-0.26	2.91	2.98	2.15	-7.77

What type of employment benefits matter most to you?



The data indicate that all benefits are not created equal and that some are more preferred than others in terms of importance. The chart at the left indicates how the workforce values different types of benefits with health insurance, flexible working options, retirement benefits and vacation policy being favored much more than other options.



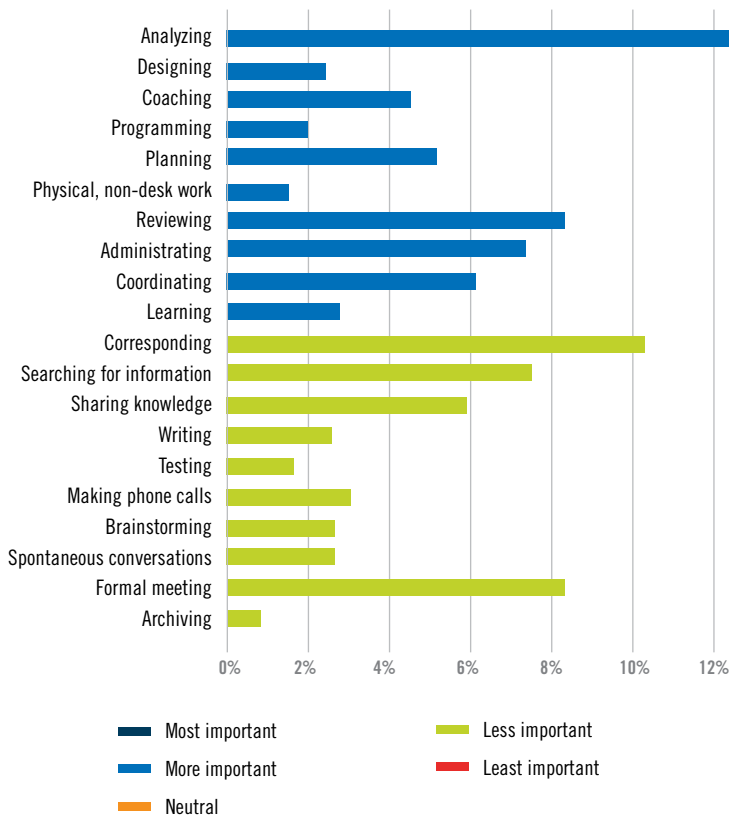
IN IT TOGETHER

WTOS data from 2022 indicated a strong need for collaboration from the workforce. **DSM employers have heard and responded to this need.** Collaboration is the area where the workforce expresses the highest level of satisfaction across all organizational characteristics (84% satisfaction) as well as the lowest levels of dissatisfaction (6% dissatisfaction). These scores are even more striking considering 2022 results for collaboration was 77% satisfaction – an already high score.

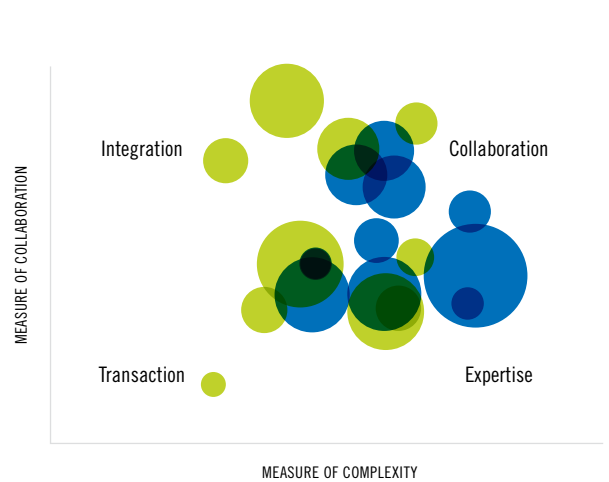
For employers seeking to improve upon these high scores, the opportunity is to provide an environment focused on the most productive forms of collaboration e.g., designing, planning, coaching, coordinating and learning. According to national polls, and the results of this study, employees are wary of unnecessary distractions in the office. Knowing that much of the most critical work in DSM requires focused analysis, making sure the office environment and policies are aligned to the tasks that are creating the most value for the organization is a great next step for leaders looking to maximize workforce effectiveness.

The other area to consider for greatest productivity gains is a review of formal meeting time to ensure that the time spent in them is focused on brainstorming, decision-making and problem solving rather than on merely sharing information that could be disseminated via other channels.

Activity Rank



Work Dynamic

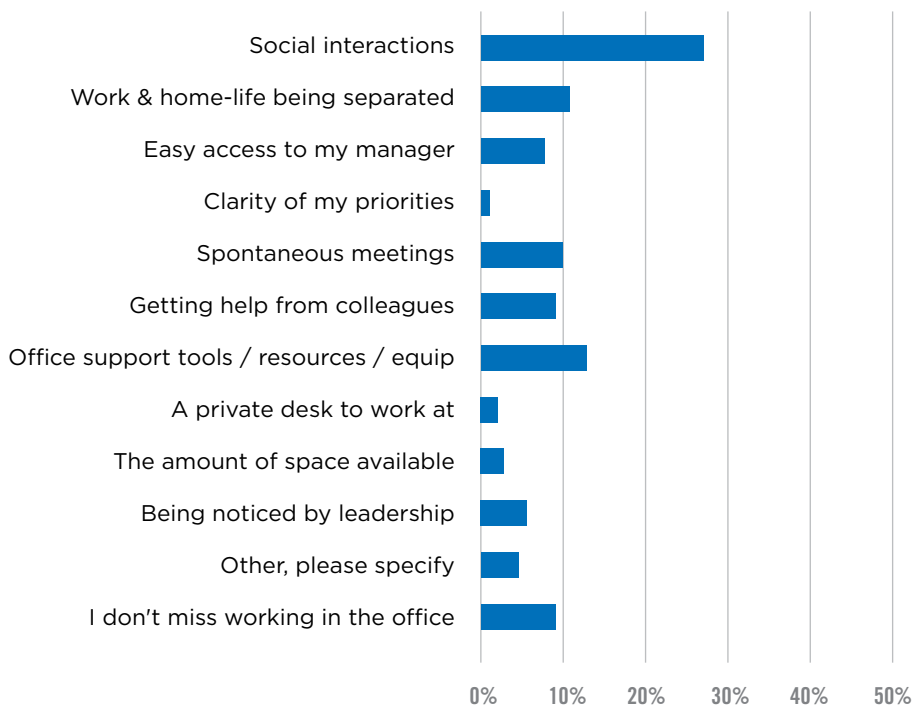


OFFICE SPACE MATTERS

WTOS results for mobility in 2022 reflected an across-the-board call for more ability to work from home with a desired 43% split of time in the office. 2023 data indicates that the workforce recognizes the importance of time in the office, as the ideal office time target has jumped to just over 50% across the total population, a 7% increase in just one year.

The workforce values meaningful social interactions at work (26%) more than twice as much as the next attribute (office support tools at 11.5%) indicating that the value of being around their co-workers is important. Younger workers especially understand the importance of being together, as respondents in their 20s indicate a desire for a 60% split of time in the office and those in their 30s report a desire for a 57% split of time in the office. This may highlight the need of acculturative activities such as coaching, relationship building and training.

When working from home, what do you miss most about working in the office environment?

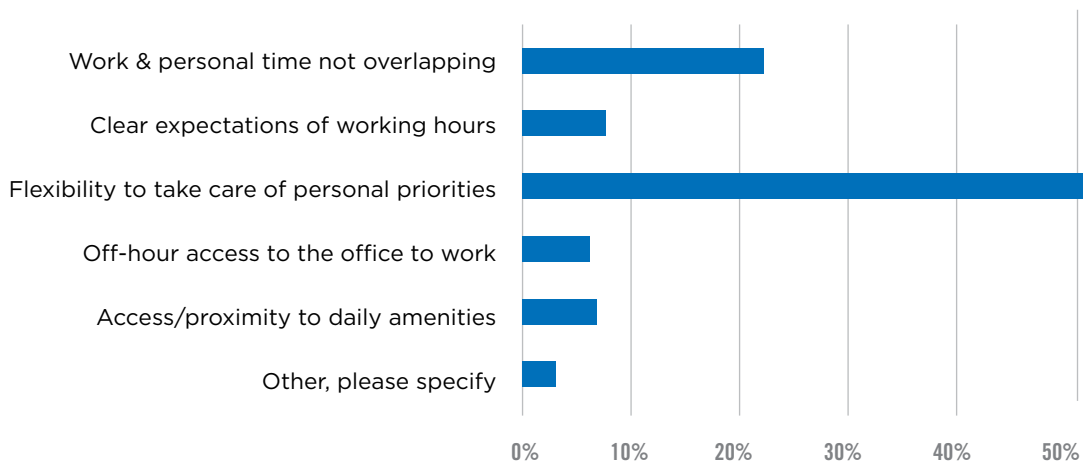


FLEXIBILITY FIRST

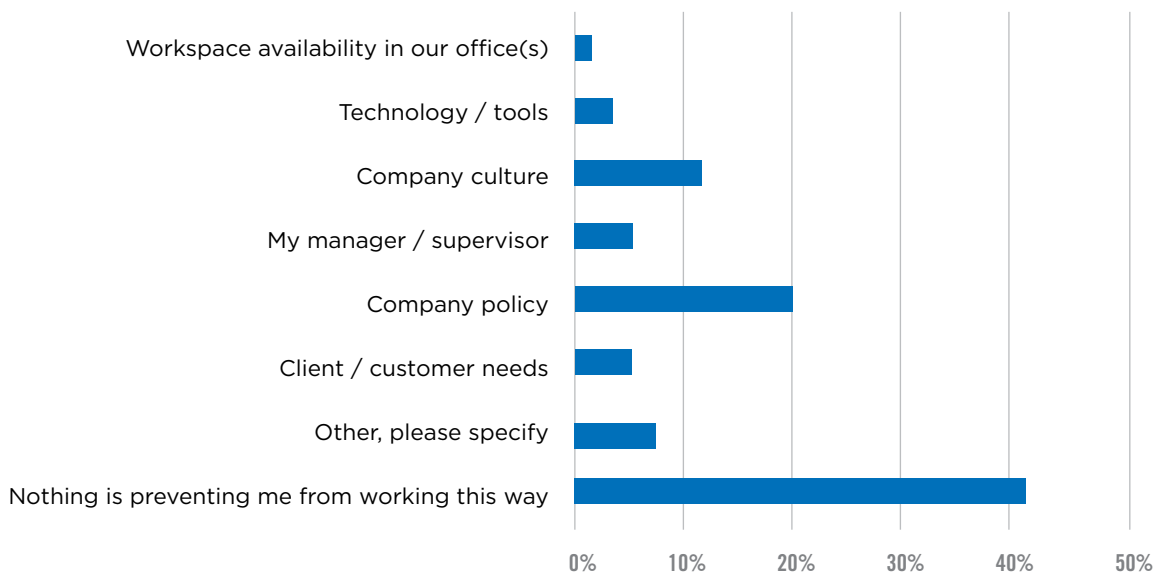
Reflecting the importance of work-life balance, 53% of workers prize flexibility to manage personal commitments. This more nuanced understanding of workforce needs allows employers to design policies requiring time in the office that is important for their business while making allowances to support employees' personal commitments.

20% of employees said there were policy obstacles to flexible work arrangements in 2023 down from 26% in 2022. The data indicates that **DSM employers are getting this right**.

How can we best promote a healthy work/life balance?



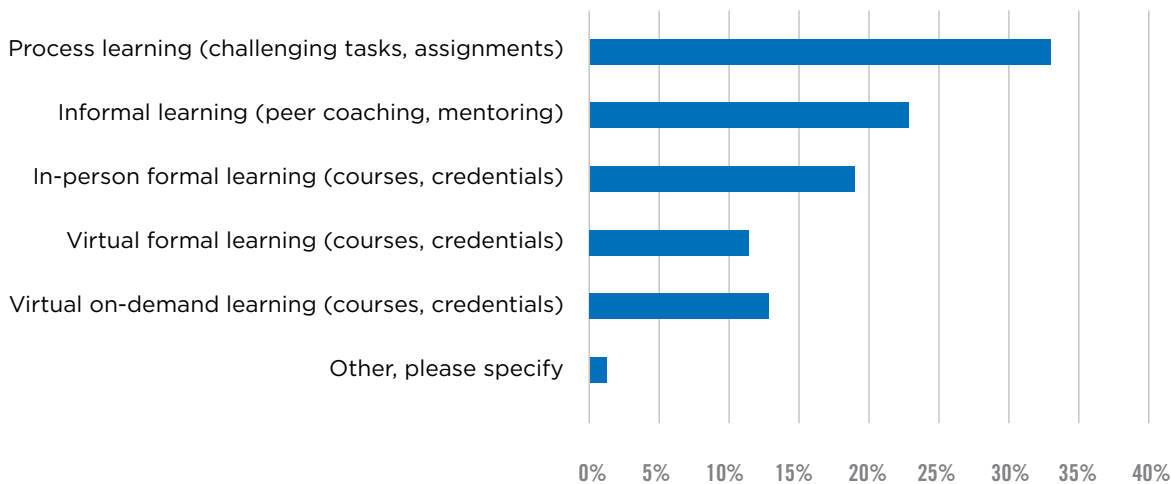
Is there currently anything preventing you from working this way?



LEARNING CULTURE

In 2023, learning and development opportunities have risen the ranks as a top priority for the workforce. The DSM workforce is very strongly oriented toward “process and informal learning” such as challenging tasks and assignments (33%) as well as learning from peers and mentors (23%). Coaching retains a high ranking for its ability to add value for the workforce. This reflects trends identified in other national studies, for instance, a recent Gallup study which found that 71% of employees said training and development opportunities increase job satisfaction and 61% cited such options as a reason to stay with their organizations. Similarly, in a recent LinkedIn Learning Report, 94% of respondents would remain in a role for a longer period with employers who invested in staff development such as career coaching, training, and education opportunities.

Which methods of learning are most effective for you?



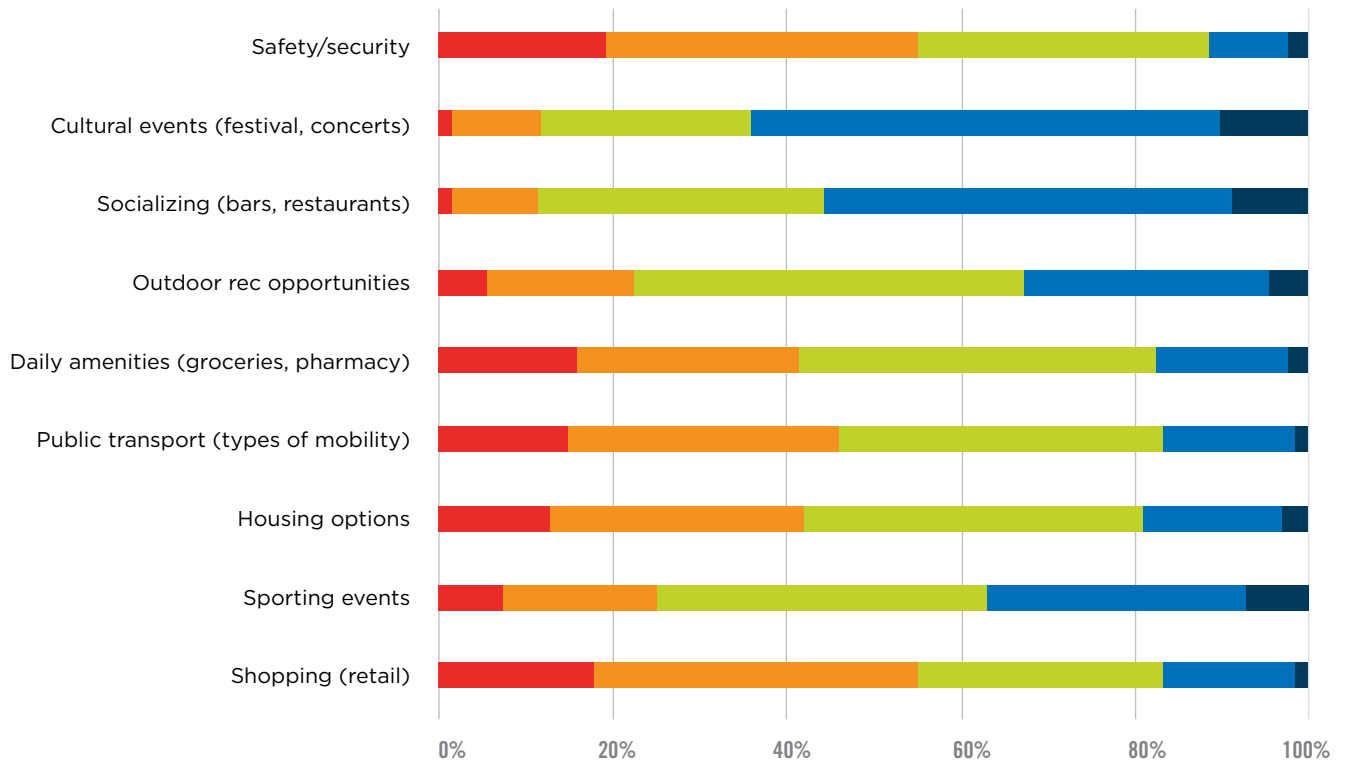
One critical finding in the data is that although learning and development is highly valued and the workforce prefers to learn “on the job”, workers prioritize sharing knowledge lower than the top ten most valuable activities. **This indicates an opportunity to revisit how staff is recognized and incentivized for activities that support other team members’ growth and development when it is not a primary role responsibility.** There is an opportunity for leaders to ensure that expert staff, who are well-suited to provide learning opportunities for others, receive recognition for these activities.

3. INSIGHTS FOR DOWNTOWN DSM

The WTOS gathered data on workforce perceptions of Downtown DSM to inform an understanding of what makes this city unique and where resources should be devoted to continuing the vibrancy of this community.

SAFETY

The most important attribute ranked by the DSM workforce is that of safety and security. It is also the least well performing attribute in terms of satisfaction.



The greatest opportunity for Downtown DSM is to enhance the sense of safety and security. Plans underway for the redevelopment of Downtown areas and Skywalk revitalization should boost overall satisfaction and utilization.

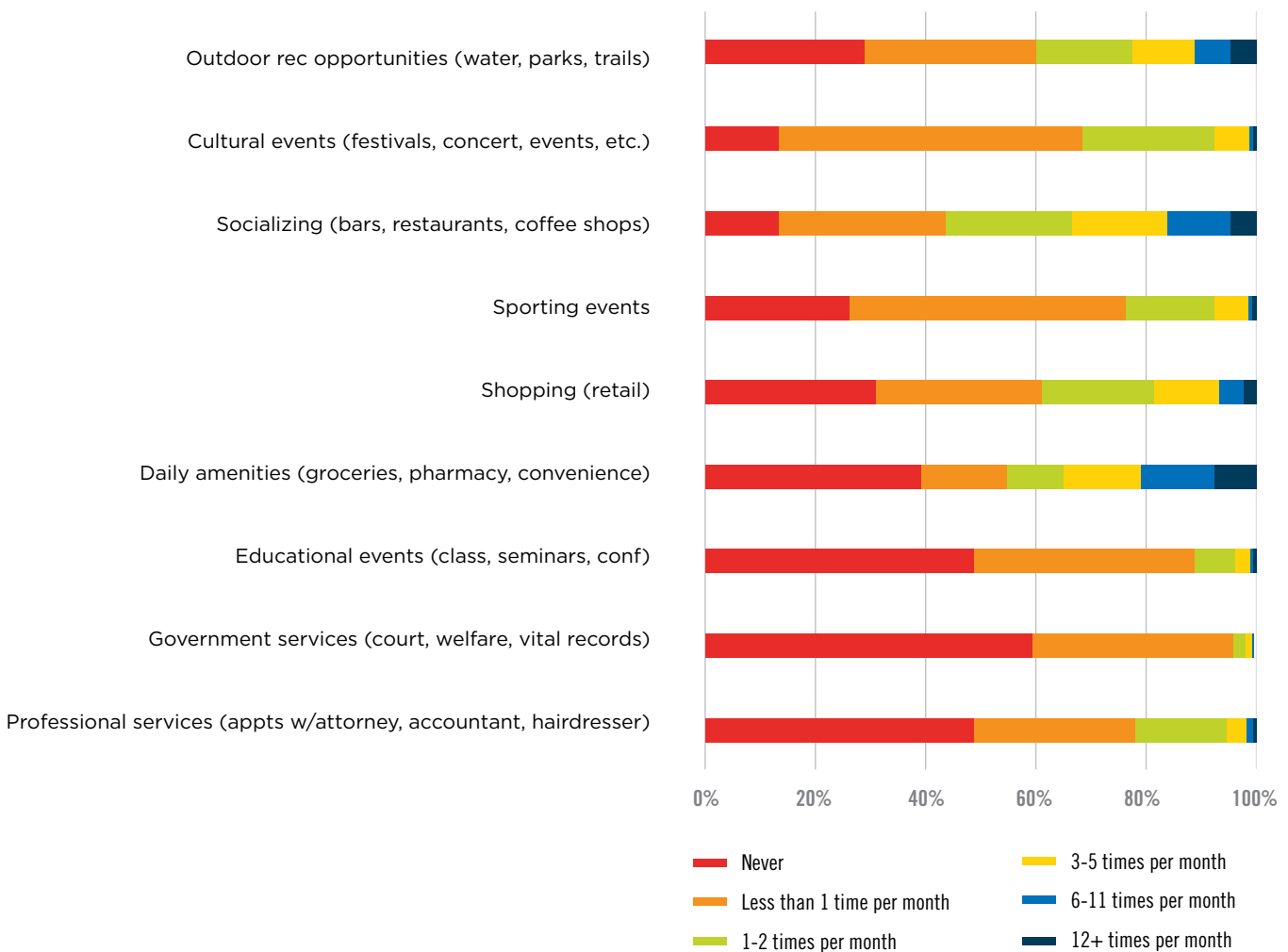
The data indicates that cultural events, socializing and outdoor recreation are the top three attributes with the highest levels of satisfaction. These strengths should continue to be leveraged for improving the vitality and attractiveness of Downtown DSM.

OUT AND ABOUT

Workforce usage of Downtown amenities has changed since 2022 as the workforce continues its evolution post-pandemic. There is a bi-modal distribution with the use of amenities where there is less usage of amenities and at the same time a growing number of “super-users” of amenities. For example, the use of daily amenities saw a large decrease in infrequent users (-31% for workers using these less than one time/month) but a 5% jump in workers seeking daily amenities 3-5 times/month, an 8.6% jump in the 6-11 times/month category and a 4.4% jump in the 12+ times/month category.

Attendance at cultural events has remained the most stable with infrequent users slightly decreasing their usage (-3.3% less than 1 time/month & -3.6% 1-2 times/month) and very modest gains in usage at the 3-5 times/month and 6-11 times/month categories.

How often do you attend/perform the following activities in Downtown DSM each month?



KEEP IMPROVING

Participants were asked whether positive changes were important to them and how often they would utilize Downtown in the future with these changes. Researchers wanted to understand if the workers were at a saturation point with their usage of Downtown i.e., if there was a point of diminishing returns. What was found was encouraging – 68% would utilize Downtown more with continued improvements – particularly among younger workers and empty nesters.

THE RIGHT BALANCE

Respondents were asked to provide their ideal ratio between walking and driving to access businesses and amenities Downtown. Researchers wanted to understand how workers prefer to get around including transit and parking infrastructure. What was found is 43% desire greater walkability around Downtown, while 40% feel the current ratio between walking and driving is ideal (up from 32% in 2022). That leaves only 17% of workers with a desire for easier driving and increased parking spots. The data suggest there is opportunity to consider how to optimize the balance between using existing parking ramps and skywalk with the redevelopment of spaces into appealing pedestrian districts that provide the cultural and recreational opportunities workers say they value.



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