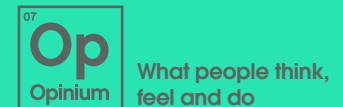
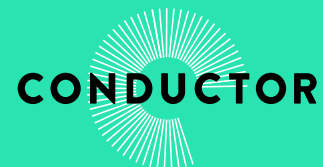




The 2021 Thrive Survey

Q1 2021

An in-depth look at how we are thriving as individuals and communities, in the context of the spaces and places we are connected to.



What have we set out to do?

Together with our insight partner, Opinium, Conductor has set out to undertake a thought-provoking quarterly survey of 2,000 UK-wide participants. This is the first in a set of four reports which will culminate in an annual report at the end of 2021.

Why are we doing this?

As “orchestrators of thriving societies”, Conductor is seeking to firstly ascertain what “thriving” means to people, to determine whether we are currently thriving, whether our communities are thriving and then to drill down into “thriving” in the context of the spaces and places we are connected to – from our homes and workplaces, through to our neighbourhoods.

Who is this for?

This set of insights is invaluable to anyone wishing to gain a better understanding of the participants that are connected to their spaces and places, and who wish to see how sentiment changes over the coming year, as we emerge from lockdown and a world that has been restricted by the pandemic.

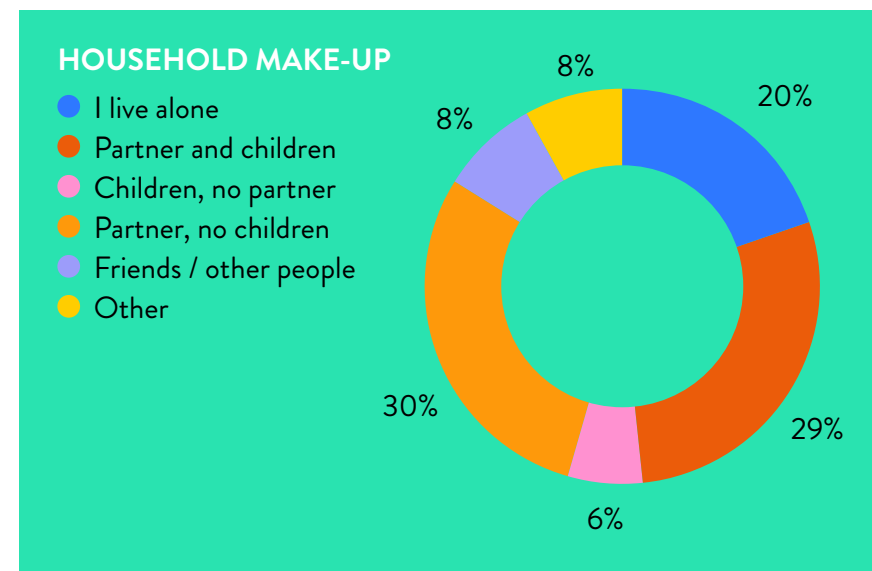
How did we do it?

The results provide a summary of a large data set which we have analysed and interpreted, using our experience within spaces and places and our human-led insight approach. We have created a narrative that links and highlights the standout findings.

Get involved

That said, if you wish to understand more about location, gender, household status, specific age groups and income brackets, please do get in touch. And furthermore, if you have any questions you would like us to raise in the next round of surveying, let us know.

Finally, if you would like to participate in our Thrive Ecosystem, which brings together like-minded souls involved in the creation of spaces and places, get in touch [here](#).



Respondent vital statistics

- 2,004 respondents
- 49% male, 51% female
- Representative adult age population in all regions of the UK: 18–24 28%, 35–54 33%, 55+ 39%
- 61% working part or full time with 23% retired, 3% unemployed
- 61% of respondents have children – 7% pre-school, 16% primary school, 12% secondary school and 36% with over 18s
- Household makeup (chart)
- 61% own, 31% rent, 8% living rent free
- Representative adult population personal income: £0–20k 35%, £20–£40k 29%, £40k+ 21%

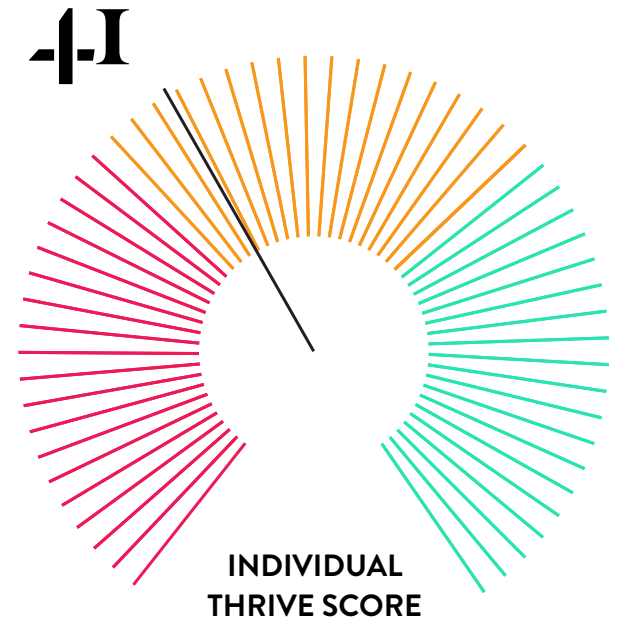
The Thrive Scores

Our Thrive Scores are a simple yet straight to the heart of the matter insight into how we feel we are faring as individuals and how we reflect on our communities as a whole.

They have been designed to capture the current mood and so will provide an interesting barometer of how well we bounce back from the pressures and uncertainties of the pandemic and lockdown.

The scoring system is pretty intuitive, a score of 0 means we're at rock bottom and at 100 we're knocking it out of the park every time. All survey participants had an equally-weighted vote, choosing between five levels of thriving for themselves and four for their communities.

We will be updating and publishing these scores quarterly to understand the changes being experienced as we come out of lockdown and start to get back to a less restricted way of life. It's too early at the moment to confidently say what the benchmark score is for people or communities to be thriving overall, but we think that 65 and above will be around the mark.

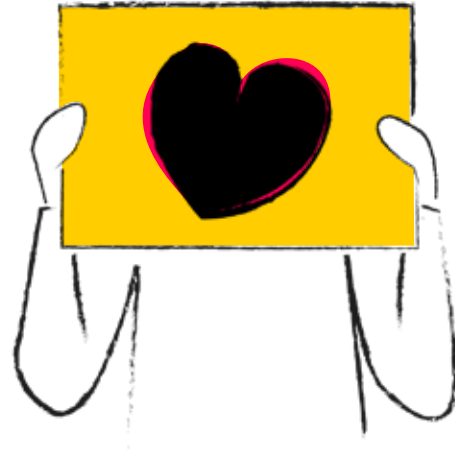


Establishing what “thriving” means to people

We asked respondents to choose the words they most associate with thriving, from a list of six (happy, secure, energised, inspired, valued, connected).

While both men and women rate happiness as the most important factor, it appears significantly more important to women with two-thirds relating it to thriving versus only 52% of men. Additionally, happiness appears to be rated more highly by those earning lower incomes.

Feeling secure is significantly more important for the older generations (58% of the 55+’s versus 39% of 18–34 year-olds). It also scores higher for those of us living alone or as a couple, for lower income earners and for homeowners versus renters.



Energised, spikes in the importance for middle age bracket (34–55 year-olds) and for those of us with school-aged children, whilst inspired is a factor that decreases in importance the older we get.

Interestingly, feeling valued and connected, are both factors that seem to gain more importance the more we earn.

“...because
I am
happy”



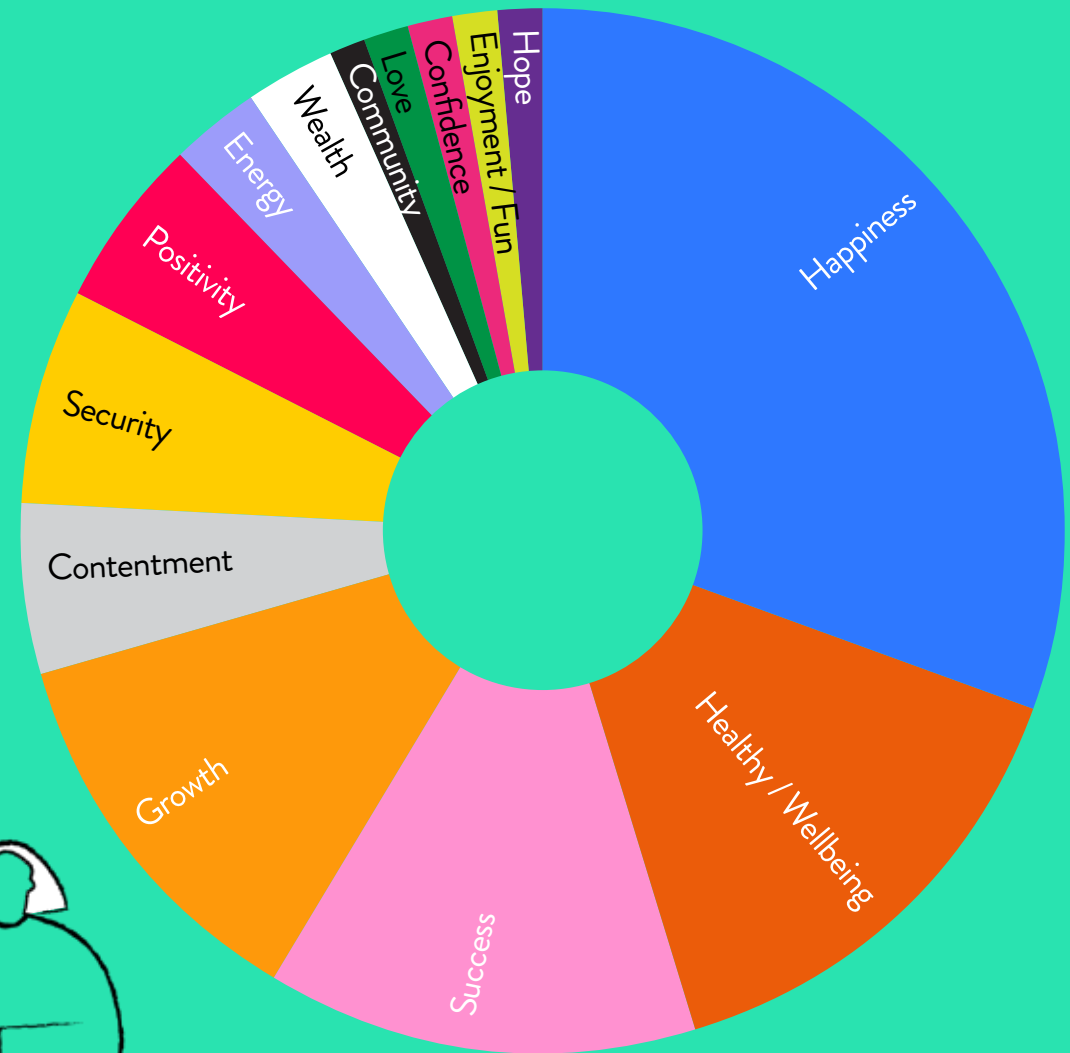
We then went on to ask people to define thriving for themselves

Happiness again comes out as the leading factor, scoring nearly twice as highly as being healthy or successful, which rate equally in second place.

Other high-ranking factors (not covered in the previous multiple choice question) are growth and contentment, the latter being associated with comfort and stability.



DEFINITION OF THRIVING



Understanding the factors that support our individual ability to thrive

Mental and emotional health has the greatest impact on our ability to thrive with nearly three quarters of us stating this is very important; closely followed by physical wellbeing (62%).

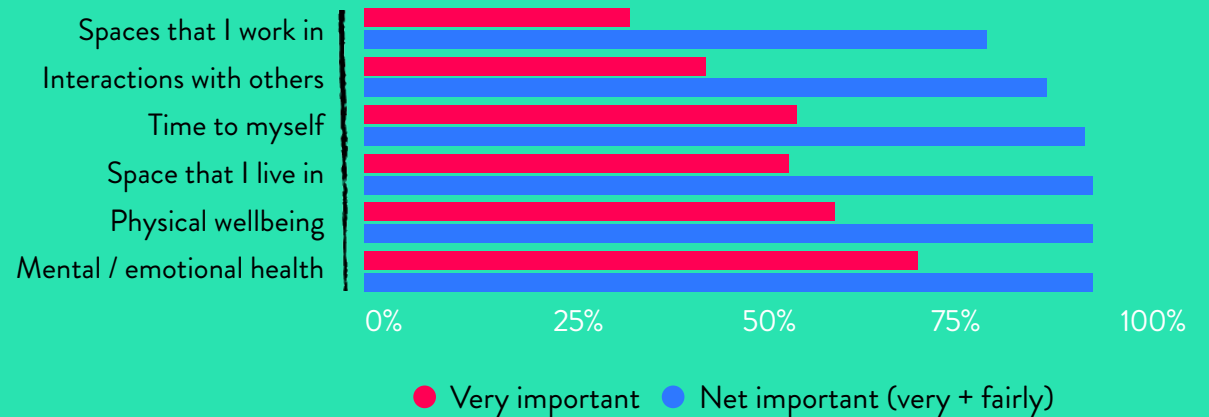
Having time to ourselves (57%) and the space that we live in (56%) are on a par, with 'time to yourself' being more important the younger we are; nearly two thirds aged 18–34 said it was very important, compared to 52% aged 55+.

Interestingly, given we are social creatures, we rank time on our own higher than interaction with others, when it comes to thriving.

FOCUS: MENTAL AND EMOTIONAL HEALTH

- A much higher percentage of women than men rated mental and emotional health as very important (82% vs 64%)
- It also rates as more important the younger we are (79% of 18–34 year-olds rated it very important vs 73% average)
- Those of us without children also see it as more important (79% rating it very important vs 70% of those with children)

FACTORS SUPPORTING AN INDIVIDUALS ABILITY TO THRIVE



Co-living insight

When looking at mental health combined with household status, we see that sharers and the latent market (e.g. living rent free) are the top rankers for rating mental and emotional health as very important. These are the prime audiences for co-living, and we must continue to think about loneliness and isolation as a factor when designing and delivering co-living communities.

73%

Said mental and emotional health was very important (scored highest) in supporting our ability to thrive

FOCUS: THE SPACE THAT I LIVE IN

Interestingly, London as a region gets a significantly higher very important score for 'space that I live in', than the UK average (64% compared to 56%), and similarly women rate this factor more highly than men (66% compared to 46%). There is also a noticeable age differentiator with a definite drop off in the importance rating, in the middle years of people's lives when the kids are at school.

Working insight

The space that we work in, while still getting a significant net important rating of 82%, was clearly the least important of the six factors for us when considering our ability to thrive.

London scores highest for 'space that I live in'.

Those of us that live alone or with fewer people, place more importance on the space that we live in. Interestingly however, there is very little difference in importance ratings between renters and owners; likewise the level of importance does not vary according to different income levels.



62%

'Physical wellbeing' ranks 2nd as very important in supporting our ability to thrive.

57%

'Time to yourself' ranks 3rd as very important in supporting our ability to thrive.

56%

'The space that I live in' ranks 4th as very important in supporting our ability to thrive

Are we currently thriving?

As we turn our attention to our current state, over twice as many of us (44%) say we feel like we are rarely or never thriving, compared to those of us who say we feel that way often or all of the time (19%).

Those of us from the North East are most likely to be thriving with over a quarter (28%) saying we feel this way often or all of the time.

When it comes to the factors influencing this current mood, 'time to ourselves' (68%) and the space that we live in (67%) are the factors having the most positive impact on our ability to thrive. Whereas for a fifth of us, mental and emotional health and physical wellbeing is having a negative impact on our ability to thrive.

The overall average thrive score of 40.8 is below "average" i.e. overall not thriving. It is pretty sobering, but not so much as the 44% of us that said we are thriving 'rarely' or 'none of the time'.

“not really...”

FOCUS: EMERGING THEMES

In looking at the various segments and how they vary the following themes emerge:

- Males seem to be doing better than females
- The older age groups (55+) seems to be doing better than the rest
- Those who are unemployed are suffering significantly more than others
- And in line with this people are thriving more, the more they earn
- Owners seem to be thriving more than renters
- Parents look to be thriving more than non-parents

Is this feeling just temporary?

41% of us state our level of thriving is a consistent feeling whilst 42% say that we experience a pendulum effect of swinging back and forth. Far less said it was a temporary phase (12%).

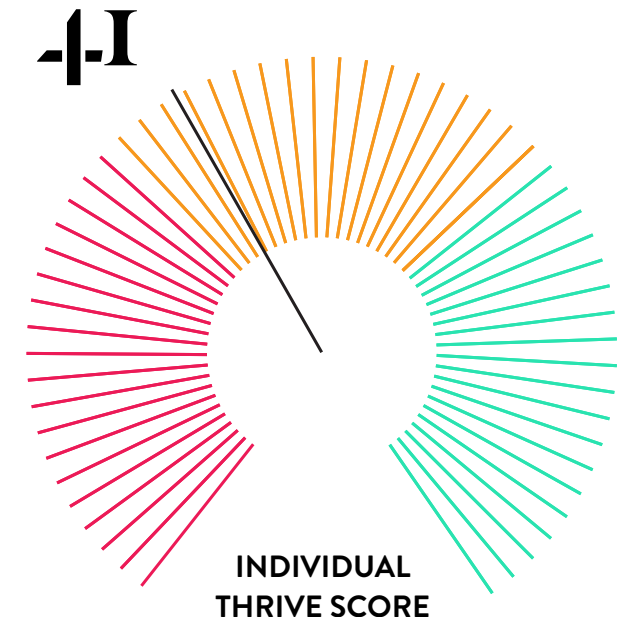
We also seem to feel more consistency when we live alone (52%). This lessens significantly when we live with friends/others (30%) or have "other" living arrangements (28%), whilst living with a partner and/or children, lie in the middle of these extremes.

But it isn't all bad news...

It is common knowledge that we have been experiencing a tougher than normal time in our collective lives, over the last year. The good news is that we recognise this impact on our current ability to thrive and we see a silver lining from our current position, with 52% of us seeing an ability to bounce back in the future.

Additionally, 70% of us who feel we are thriving the majority of the time, see this as our consistent state.

We will monitor these indicators with interest as we emerge from lockdown.



Living insight

Interestingly, when it comes to living conditions there would seem to be a split; those living as couples (no kids or empty nesters) are thriving the most out of any household set-up, however those living with friends/others (sharers) are scoring the lowest.



Now turning our attention to our communities: what does it take for them to thrive?

The services in a community (e.g. GP, dentist), followed by its people and then its amenities (e.g. playground, green spaces) make up the top three most important factors.

Conversely, its architectural design and its history are considered the least important factors.

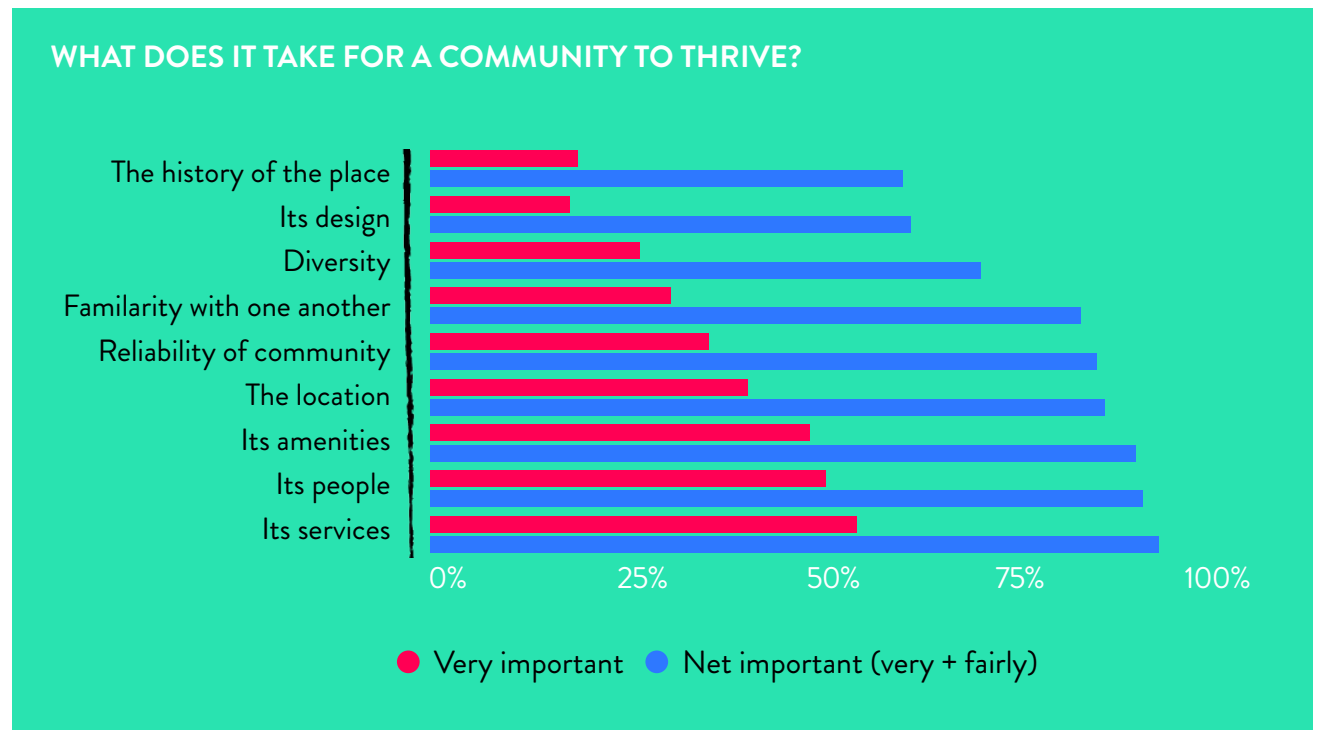
Observations

DIVERSITY

Only one predominant theme sticks out and that is age: 47% of 18–34 year-olds think diversity is very important compared to 24% of 35–54 year-olds and 16% of the over 55 age group.

SERVICES

Females value services higher than males (61% vs 49% rating as very important). The other cohorts that jump out with significantly above average ratings are retired people (65%), those with pre-school aged children (63%), those living alone (62%) and lower income earners (60%).



PEOPLE

55% of females rate people as a very important factor compared to 48% of males. Those without children (55%) or with very young children (64%), rank people more highly than those with secondary school children (42%).

AMENITIES

Once again, more females rate amenities as a very important factor compared to males (53% vs 44%) with a similar disparity existing between those under 55 versus those 55 and over (54% vs 41%). Other meaningfully above average sub-groups are those with pre-school children (66%) and higher income earners (58%).

DESIGN

The younger age groups rate design more highly (27% of 18–34 year-olds think it is very important vs 16% of 35–54 year-olds and 13% of the over 55 age group). Higher earners rate it more highly with 27% of those earning over £40k rating it very important vs 16% for those below £40k.

Are our communities currently thriving?

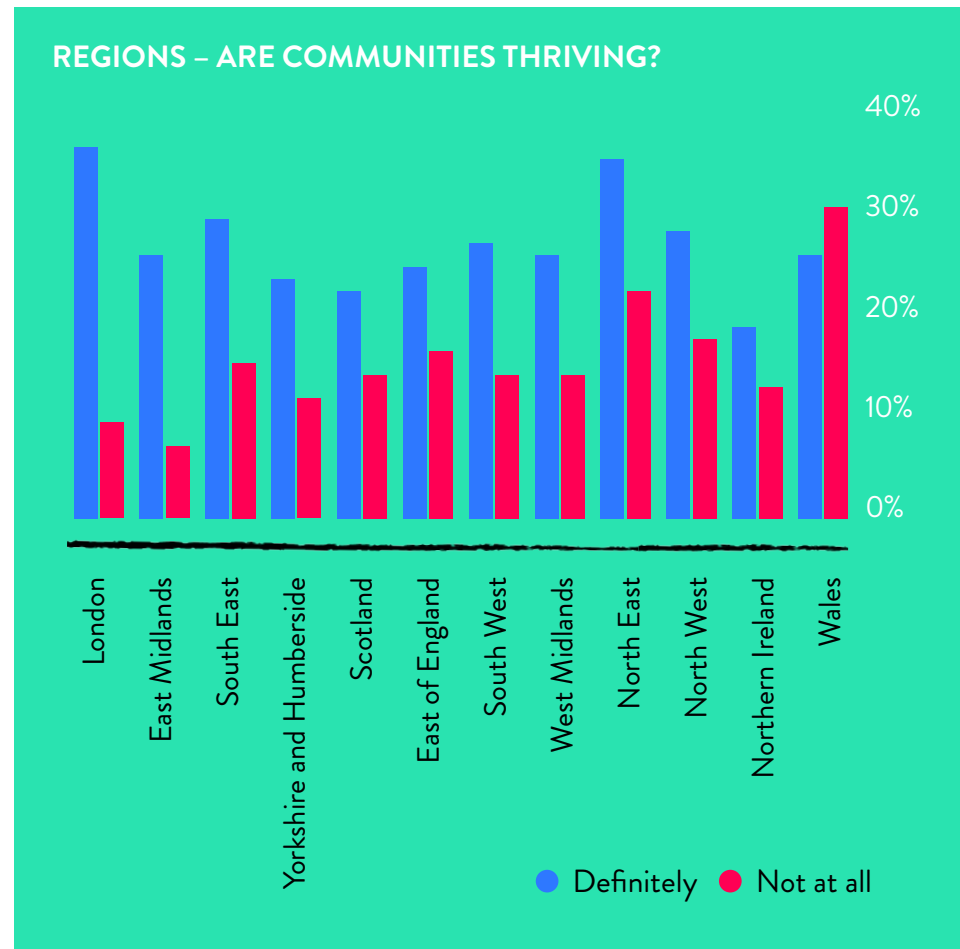
Over a fifth of us feel that our community is currently thriving, with a further 45% saying it's got a little way to go but it's getting there.

Those of us from London (31%) and the North East (30%) are most likely to say our community is thriving. Whereas those from Wales (26%) are the most likely to say its community is not at all thriving.

Nearly three quarters of us think the amenities in our community are having a positive impact on its ability to thrive. This is closely followed by 72% who say that the services are having a positive impact and 72% saying its people have a positive impact.

Renting insight

Owners (Thrive Score: 64) see our communities as thriving more than renters do (53). What does this mean for the opportunity to create communities within Build to Rent and Co-living?



London	65	South West	59
East Midlands	64	West Midlands	58
South East	61	North East	58
Yorkshire and Humberside	60	North West	58
Scotland	60	Northern Ireland	57
East of England	59	Wales	50

Missed opportunity insight

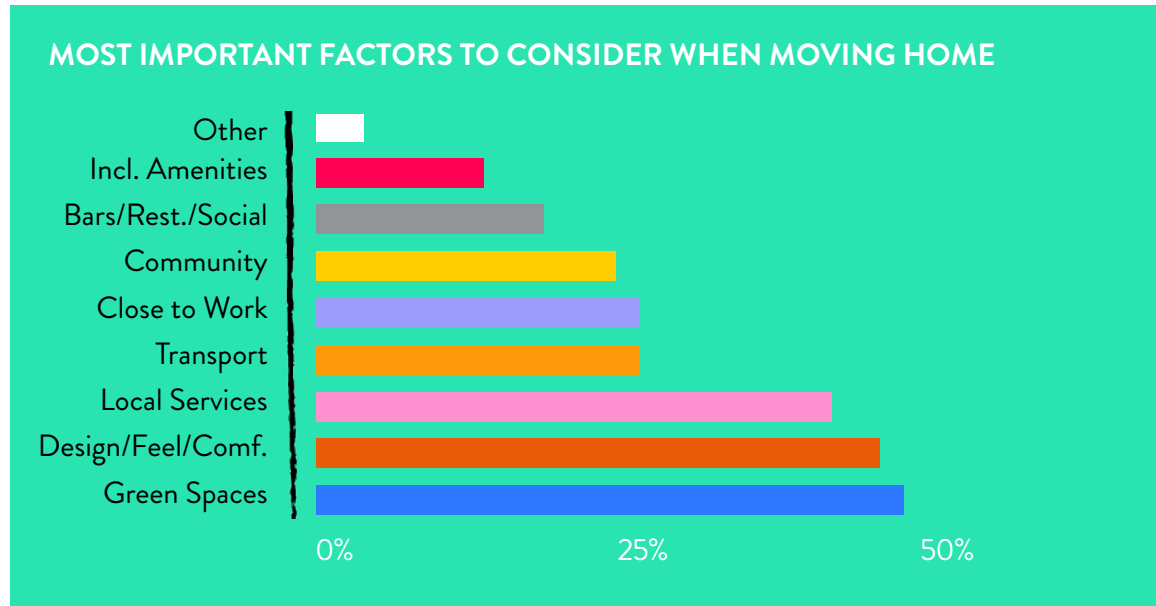
We don't currently see the more cultural elements of history, diversity and design as being as important as other factors in helping our community to thrive. How can we as an industry go further to celebrate and promote these elements as we understand how important they are in contributing to great places and community building?



The future... of living

We asked people if they were to move house in the next six months what the most important factors would be in considering where to live.

When imagining moving home and choosing where to live, proximity to green spaces proved to be most important, with half selecting this. This was closely followed by the design, feel and comfort of the home (47%) and proximity to local services (43%).



IMPORTANT MOVING FACTORS SEGMENTED BY DEMOGRAPHICS

There are many slices of our survey that provide interesting insight into the differing preferences of sub-groups, here is how a few of the stand-outs voted.

	Green Spaces	Design/Feel/Comfort	Local Services	Transport	Close to Work
18-34		Major factor			47%
Londoners	Major factor	Major factor	Major factor	45%	
Full time work	44%	Major factor			Major factor
Pre-school Kids	45%				Major factor
No Kids	Major factor	48%			
Sharers		49%			Major factor
Renters	Major factor	Major factor	45%		

x% Top Choice Major factor

The future... of working

Two thirds of workers have been working from home during the pandemic, with two fifths of us working from home more than we used to. In the future however, 69% of us want to work from home for at least one day a week after the pandemic is over, with 2.4 days at home being the desired average. However only 56% of us expect to be able to work from home, and on average we expect to be able to work from home 1.9 days a week.

While three quarters of us feel that having central workplaces that everyone goes to is important when it comes to building a team atmosphere and relationships, 76% feel that having choice over where we work is important to support our wellbeing. In fact, 74% say that the pandemic has shown that it's not necessary for us to work in the same place for a business to thrive.

2.4

The average number of days workers would like to work from home when the pandemic is over.

WORKING FROM HOME DURING THE PANDEMIC

Women have worked at home more than men during the pandemic (46% vs 39%) as have Londoners compared to the rest of the UK (59% vs 42%). There are no surprises that those with primary school children have done so too, more than any other category of parents (48% vs 40% overall UK average).

Those living alone have worked from home more than other classifications of living arrangements (49%) and so have owners compared to renters (49% vs 28%).

Finally, higher income earners have worked from home much more than lower income earners (49% of those earning over £20k pa vs 20% of those earning under £20k pa).

Workplace insights

The research points towards the inclusion of home offices in future designs as well as co-working amenity spaces within developments.

76%

Feel choice over where we work is an important factor in supporting our wellbeing

74%

Do not think it is necessary for us to work in the same place for a business to thrive



Conclusion

So what does all of this mean and how does it apply to our industry and the spaces and places we create?

We know that for people to identify as thriving, they need to feel happy. How can we ensure our spaces and places instil a feeling of happiness amongst its participants? How do we weave mental and emotional health and wellbeing into our spaces and places, not just by paying lip service to them but by looking at all aspects of design, planning and community, especially given 67% of us say the space that we live in is one of the most important factors impacting our ability to thrive.

People and communities aren't currently thriving as well as they could be. Yes, we have been in the midst of a pandemic, but nevertheless, there is an opportunity for us as an industry to start with people rather than places and listen to what they are feeling rather than just what they need. We know that many of you reading this are already thinking this way and working tirelessly to consciously create spaces and places that add to a person's wellbeing. We celebrate you and invite you to get in touch, contribute and join our Thrive Ecosystem.



Putting participants first

We hope that this has been an interesting and useful read. We have embarked on a journey in 2021 (and beyond), to understand how the spaces and places that we are connected to are enabling or inhibiting our ability to Thrive. The aim is to understand what we as an industry can do to incorporate these findings into our plans, designs and strategies. We at Conductor believe that both social and economic returns are possible – they are not mutually exclusive – and the participants in our spaces and places must always be the starting point. The key to unlocking this potential is human-led insight.

First listen, then understand, then do.

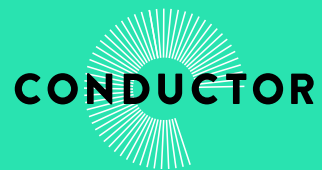
“First listen,
then
understand,
then do”

About Conductor

Conductor was born from the desire to help our clients make the most of their spaces and places with the ultimate goal of enabling their participants to thrive. We help our clients to identify and understand their audiences, to connect with and convert them to customers. And then, ensure a customer experience to enhance satisfaction, retention and reputation alike.

Based on our three pillars of Explore, Generate and Thrive; we use data fused with human-led insight, and our bespoke tried and tested systems and services, to create and deliver successful go-to-market strategies. These strategies help our clients deliver all-encompassing, resilient and prosperous spaces and places.

conductor.london



About Opinium

Opinium is an award-winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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