The Office Awaits

Reinventing the workplace for a post-pandemic future

Introduction

What will it take to breathe new life into offices having to adapt to the changes brought on by the perfect storm of technological advances and a global pandemic?

How do you continue to operate as normal in a world where everything has changed? That has been the conundrum facing businesses and employees throughout 2020.

Those holding office-based roles have been hugely affected. Home working was already on the rise supported by technological advances, but globally we have seen a shift accelerated by the pandemic. In June, only one third (34.8%) of the UK workforce was operating at their normal place of work*.

Economically, Covid-19 has devastated much of the western world. And we know that in downturns, office demand generally drops away as employment falls and companies switch their focus to cash preservation**. But in 2020, we are not dealing with a 'normal' recession. We are grappling with a fundamental reshaping of people's approach to their professional life.

Indeed, the "successful adoption of homeworking has caused employees and employers alike to question the future of the office"**.

But where do those questions lead? What answers do we find? And what are the ramifications of this shift on the future of office functionality?

In September 2020, we surveyed hundreds of people in six European countries to try to understand the feelings held by workers as they contemplate a potential return to office working in 2021.

We asked respondents in the United Kingdom, Finland, the Netherlands, Norway, Spain and Sweden about the impact of their homeworking experience in 2020. We dug deeply into the emotional shock of such a disruptive change. And we sought to find clarity on what will be needed to encourage European workers back into shared office spaces.

The result is a comprehensive insight into the challenges employees, architects and designers will face as they try to successfully reshape our professional lives.

**Office for National Statistics
**JLL - The Future of Global Office Demand

Understanding a new working landscape

Across Europe, working life has been reshaped for hundreds of millions of people. Home working has surged at an unprecedented rate. But when the dust settles, what do employees want from their new future?

The working landscape shifted significantly in 2020. In April, the UK's Office for National Statistics found 86% of those working from home did so as a direct result of Covid-19*. But for many, the switch to homeworking could outlast the pandemic. Many expect the changes to be enduring and deeply embedded into a new working culture.

By September, our survey found a significant majority of European respondents were still working from home on either a full- or part-time basis. In the UK, 80% worked from home for at least some of their contracted hours. There was also a clear majority of respondents homeworking in Finland and Sweden. Only in Spain and the Netherlands were the majority of workers not working from home. Even then, we found 70% of all workers were delivering at least some of their work from home.

Four in 10 (41%) of those questioned believe they will return to the office full-time in the next six months. But there is no settled view on this. Twenty-six per cent say they will not be making a full-time return to the office over the same timeframe, while 27% did not know either way. The combination of uncertain and unpredictable medical advances, alongside profoundly changed working practices, means considerable doubt exists about the future.

For many, though, there is a keen desire to return the office: 55% either enjoy home-working less or the same as office-based working. Only the UK (54%) and the Netherlands (58%) had clear majorities of respondents who enjoyed home working more than office working.

Understanding what is causing these feelings will be key to creating a successful and productive workforce. Across Europe, 81% of our respondents say they had adapted easily to working from home. The figure was even higher in Spain and Sweden, and rose to 100% in Norway.

Successful homeworking requires at least two crucial elements: access to appropriate technology and an environment that can facilitate effective working habits. The high percentages of those who believe they have adapted easily to working from home suggests neither of these practicalities have – in the main – been particularly restrictive. So why, then, do more than half of Europeans say homeworking is either less or no more enjoyable than working in an office?

*Office for National Statistics

"For many, there is a keen desire to return to the office."

OFFICE
WELCOME BACK

41%
believe they will return to the office full-time by spring 2021

55%
say home working is no more enjoyable than office working

The emotional impact of the 'new normal'

Working from home can have a profound impact on our wellbeing. Across Europe, we are seeing growing concerns about some of the negative personal impacts of empty offices and quiet cities.

In today's professional environment, mental health and emotional welfare are no longer viewed as afterthoughts. Instead, they are central parts of an employee's wellbeing and smart companies have made considerable efforts to provide the best possible settings for their staff.

Working from home undoubtedly removes some tiresome challenges, such as exhaustive commutes. But it brings with it a range of mental tests.

Only 34% say their wellbeing has improved by working from home – a figure that slumps to 17% in the Netherlands, 15% in Norway and just 13% in Sweden. Across Europe, 63% report either no change or that their wellbeing had been negatively affected.

In other signs pointing towards a growing feeling of social isolation, 10% say they feel cut off and lonely. A further 8% reported being less productive, with 5% more stressed by the removal of their normal office environment.

A similar pattern emerges when it comes to collaboration. Without the water cooler moments and open-plan office environments, just 16% say team morale has improved while staff work from home. A quarter (24%) say it has been negatively impacted and almost six in 10 (57%) claim there has been no change.

Taken together, these figures paint a concerning picture. Feelings of isolation are on the rise. In some workers, productivity is falling. And very few teams are experiencing surges in morale.

Working from home also gives people the time and space for worries, doubts and negative thoughts to grow. Almost one in four (23%) feel their job is less secure when they work from home. Not a single respondent in the Netherlands believed their position was more secure. In the UK, 30% say they feel less secure in their existing role.

30%
of UK workers feel less secure in their role

10%
feel cut off and lonely

"Feelings of isolation are on the rise."

Reassessing our priorities

After months of working from home, an element of fatigue appears to have set in. A wholesale switch away from the office is rejected as undesirable and unproductive.

For many, being away from the office was initially viewed as a positive experience. But as time has passed, the benefits of a shared working space have come into sharper focus. Few now seem convinced that 100% homeworking is the optimum way to achieve the best possible working environment.

More than a third (36%) of Europeans miss the peer interaction found in offices. In the Nordic region the findings are even more stark, rising to 44% in Finland and almost 47% in Sweden. At the same time, 26% of respondents miss the social aspects of shared lunch breaks or even just popping to the kitchen to make a hot drink. These mini breaks give workers a chance to relax and chat while the kettle boils. At home, conversational options are limited.

Other significant impacts are also clear. Almost one in five (18%) say they miss the team spirit and morale of a shared office space. Collaborative working is another painful loss, with 15% wanting to share projects with their peers in a way that homeworking can often restrict.

With these absent experiences crystalising over time, many employees are now reassessing their relationship with the office. It seems clear, in Europe at least, that the majority of people have no desire to eliminate the office from their working life.

Only 14% of our respondents say they no longer need an office. And, again, the Nordic countries show a strong community spirit. Just 9% of Finnish respondents and 7% of Swedes say the office is redundant. Not a single (0%) Norwegian respondent say they could do without the office.

Feelings of emotional attachment to the office are high across Europe. In the UK, 85% of respondents say the office is either still essential or important. That figure is mirrored in the overall findings stretching across Europe.

In large part, the desire to return to the office seems to stem from the importance of face-to-face and collaborative working. Ninety per cent say face-to-face and collaborative working is either very or sometimes important in their professional life. In contrast, just 8% of our respondents (0% in Spain, Sweden and Norway, 3% in Finland) say face-to-face and collaborative working was "not important at all".

47%
say the office is still important or essential

85%
of Swedes miss peer interaction

"The majority of people have no desire to eliminate the office from their working life."

What does the future look like?

A range of competing demands are likely to leave employers trying to strike a delicate balance in 2021 and beyond.

Understanding existing sentiment towards our redesigned working lives is one thing. But plotting a coherent way forward is quite another. The challenge of delivering safe, welcoming environments that maximise productivity while minimising feelings of discomfort or resentment is one employers face around the world.

Open-plan office space is one area where there is no clear consensus. Employers are likely to have to consult with their workforce to find a solution that works best for their ongoing operations. For example, 64% of UK workers believe the upheaval faced in 2020 has brought about an end to open-plan working environments. But workers in Finland (77%), Spain (57%), Sweden (80%) and Norway (86%) overwhelmingly think open plan offices will play an enduring role in our careers.

There is, however, significant agreement on the worth of virtual meetings. The acceleration of broadband has made video calls much more prominent in recent years. But the widespread adoption of working from home has made it an everyday activity for the vast bulk of desk workers. Ninety per cent of respondents say virtual meetings are here to stay, including 100% of all those questioned in Sweden and 91% of those in the UK.

Designing a safe working rota will also be key to many companies' future success. Handled intelligently, our findings suggest there is a clear opportunity here. With fewer people in the office on any given day, it should be possible to harmonise employee wishes for socially-distanced office environments.

Almost seven in 10 (69%) employees want a hybrid working pattern in future, ranging from anywhere from one to four days in the office and the rest of the week spent at home. Three days in the office and two days working home is favoured by almost one quarter (23%) of Europe's workforce.

Just 16% would like to work from home full-time, while a similar figure (14%) would like to work exclusively in the office. Less than 10% of UK workers want to work in the office five days a week.

At the same time, almost three-quarters (72%) of workers want their employers to bring a more relaxed design and style to the company office. If employees are associating increases in productivity through homeworking with more relaxed working environments, this is an understandable reaction. But it means companies have to juggle another important element as they plan for the return of 'normal' working conditions. Those who invest in their offices, and reflect the wishes and changes employees have experienced in 2020, are likely to become highly attractive companies able to recruit higher calibre candidates.

90%
say virtual meetings are here to stay

69%
want to split their work between home and the office

"Those who invest in their offices... are likely... to recruit higher calibre candidates."

Returning to the office

Successfully encouraging workers back into the office will rely on a combination of reassurance and proactive health measures. But are companies ready for the changes ahead?

Eventually, a large-scale return to the office will become increasingly likely. And while few expect office occupancy rates to return to pre-Covid levels, employees are already beginning to think about the environment to which they want to return.

Despite the anticipated fall in employees working from the office, just 14% of Europeans believe their company will need less space. This reflects concern around ongoing safety and a new expectation of adherence to social distancing protocols.

More than four out of five (82%) employees say their company needs either more or the same amount of office space when the workforce eventually returns en masse. The largest single call for more office space comes in Norway, where 86% specifically state they need larger working environments.

But our findings reveal that space is not the only concern for returning employees. Hygiene is now a leading priority among all workers. Good ventilation, easy-to-clean surfaces and separate food storage, preparation and eating areas are all in the top five workplace features judged very or quite important upon a return to the office.

Good ventilation is considered a particular priority in Finland, Norway and Spain, while UK employees comfortably judged ventilation and easy-to-clean surfaces as the most important features of any new office space.

These findings are reinforced by the biggest changes workers across Europe expect to see when they do return to the office. Dividers or plastic screens/partitions between desks is by far the largest expectation. This is followed by a rearrangement of desks to allow for social distancing and extra cleaning regimes. In fact, all of the top five anticipated changes are related to hygiene and virus prevention, with increased airflow capability and the introduction of more hygienic surfaces completing the set.

Yet while employees seem to recognise the scale of the task ahead, there is evidence that a significant proportion of companies have not yet grasped the nettle. Only 30% of employees say their company plans any office redesign in the next 6-12 months. In Norway (21%), the Netherlands (17%) and Finland (18%), the figures are even lower.

"*Hygiene is now a leading priority among all workers.*"

86%
of Norwegians say their company needs more office space.

Working from home: Europe's verdict

We asked our respondents to sum up their feelings about the home vs office debate.

Yes to the office

"I much prefer working in the office. I feel so much more motivated."
- Respondent from United Kingdom

"Working from home is suitable for some – but not for most."
- Respondent from Finland

"I don't feel as connected to the company or my colleagues when I'm working from home. I miss the structure, routine and people."
- Respondent from United Kingdom

"In the office, the presence of colleagues is very important. You can immediately work on problems together, get different perspectives and work towards a solution. In teleworking, this doesn't happen."
- Respondent from Finland

"To continue doing homeworking in the long term, there must be compensation because you've got to be able to work in a dedicated space. Initially, we can be flexible and find a temporary solution. But you can't just expect that everyone will have a suitable space."
- Respondent from The Netherlands

"I prefer not to associate my home with my work tensions."
- Respondent from Spain

"I just don't like being at home all the time."
- Respondent from United Kingdom

"Working from home is OK, but you definitely develop less."
- Respondent from Sweden

"An office is a superior environment as long as it is well adapted for the work, you don't have to commute too long and you can plan your time yourself."
- Respondent from Sweden

"I prefer working in the office so I can interact with my colleagues face to face."
- Respondent from United Kingdom

"It's nice when you have a lot of work to do with others, otherwise things can get boring."
- Respondent from Sweden

"I seem to work much longer hours at home as the separation between work life and home life is far less defined."
- United Kingdom

"It's just lonely working from home. Working in an office gives you a routine: waking up at a good time, exercising, eating breakfast, etc. But when you work from home, you can just get out of bed 30 seconds before you need to turn the laptop on."
- Respondent from United Kingdom

Yes to homeworking

"What don't I miss about the office? Constantly being disturbed and having to face so many conversations that are not useful to you."
- Respondent from The Netherlands

"Not having to deal with the commute is great. The transition between office and home is one thing I don't miss."
- Respondent from Finland

"Working from home has benefitted my work/life balance, without having any negative impact on my work."
- Respondent from United Kingdom

"I don't miss the stress, the commute or the fact you spend less time at home."
- Respondent from United Kingdom

"Being disturbed when you're busy is one of the most frustrating things about the office."
- Respondent from Norway

"Public transport journeys – I'm glad I don't have to face those as much."
- Respondent from Spain

The expert's eye

Formica Group Design Manager Nina Bailey shares her insights on the future of the office.

"Companies looking to reopen their offices should accommodate new demands as a result of the pandemic. Social distancing initiatives, next-gen hygiene protocols, plenty of lush greenery and mindful amenities will create an inviting environment for employees to return to the workplace.

Solid colours will become ever more popular as a design element, as well as a way of indicating and communicating different office spaces (wayfinding) and their uses.

Natural-looking products reminiscent of the outside world will continue to trend, because they will help to create an inviting and stimulating office environment for anxious employees.

And as we work more from home, we need the office space to provide a different dynamic and feel for collaborative working, rather than focusing on individual desk-based work. So the workplace will be transformed into a hub of flexible spaces that can be used in new ways.

We must also rethink office desks. Rather than designing offices for nine-to-five occupancy, employers should curate spaces for intermittent mixed use. We may see a rise in smaller offices with hot desking and strict clean-after-use protocols.

Three practical elements will need to be considered in future office designs.

1. Distancing
Creating enough space to ensure workers feel comfortable and safe will mean a more relaxed and productive workforce. Multifunctional and modular furniture will also increase, with flexible furniture and moveable platforms helping the office to become more adaptable.

2. Hygiene
Textiles and upholstery may lose their appeal, with laminate and naturally hygienic products of brass and copper becoming the materials of choice. Investing in clean and hygienic materials will help to encourage employees back to the office, while promoting wellbeing and boosting biophilia will be hugely important – especially in city locations where there is little outdoor space.

3. Breathing space
Employers should look towards providing better air quality, either through better building ventilation or by adding more plants to improve airflow and wellbeing.

While some people are satisfied working from home, others yearn for the collaboration and social elements offered by the workplace. Employers should aim to create flexibility and offer spaces for meetings, workshops and catchups. Because as much as we talk over video calls, it is never quite the same as face-to-face working. By creating spaces that can be open-plan enough, the working sense of community can start to rebuild."

"As much as we talk over video calls, it is never quite the same as face-to-face working."
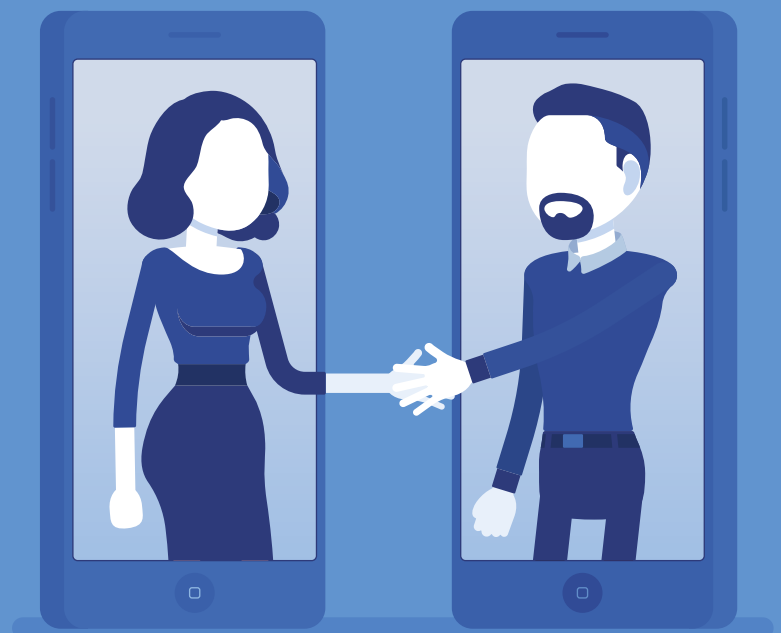
5 steps to a better office

"This is likely to transform current approaches to offices environments." That was the verdict from one of our UK-based respondents – and we couldn't agree more.
Here are five tips to create a better office fit for the future.

1. Embrace adaptable design
"In an office, you need to find a suitable free space for a task that requires concentration," said one of our Finnish respondents. Many organisations had already identified this need before Covid-19. Addressing it as larger numbers of workers return to the office will be critical. Inbuilt 'cellularisation', where environments can be reconfigured and workers can retreat into defined areas for meetings or quiet work, will be central to success. A one-size-fits-all approach will no longer work when office use is likely to be so fluid.

2. Install lightweight furniture
Key to the successful implementation of adaptable design is the use of lightweight furniture. If desks, tables and chairs are to be reconfigured, they must also be light enough for workers to be able to quickly and easily move them – without risk of injury or harm. Fitting lightweight furniture mirrors technological advances, where physical connections have been replaced with wireless services and portable devices are increasingly 'the norm'.

3. Develop cleaning regimes
Take time to devise and implement a cleaning regime that gives your employees the confidence to return to the office whenever they need. Formica laminates are regularly used in hospitals and clinics because they are proven to help to reduce the growth of bacteria. They are completely sealed and impervious, with only warm, soapy water needed to maintain ongoing cleanliness. This will help to reassure both staff and visitors that your office is equipped for post-pandemic life.

4. Choose appropriate colours
Colours help to incorporate corporate identity into an office's design, something judged as quite or very important by 62% of our respondents across Europe. But more than that, they create a workplace in which employees can thrive. Choose colours that reflect the lifestyles of your employees. The aim is to inspire creativity, enhance wellbeing and design an environment in which productivity surges.

5. Guarantee social distancing
Ease anxious employees' nerves by taking time to carefully plan the layout of your redesigned office space. With fewer employees expected to be in the office on any given day, there is an opportunity to space workers further apart and alleviate concerns about the potential spread of viruses.

Designing a new tomorrow

In 2020, we have witnessed a major social change.

Homeworking has moved from something done by the minority of the population, often only on a part-time basis, to something most office-based roles have had to embrace on a full-time schedule. While homeworking was already growing, a global pandemic has accelerated its advance beyond all previous expectations.

Unsurprisingly, this has brought plenty of turbulence.

Some workers got the lives they'd always dreamed of. No more commute. No more office stress. Quieter working environments. What's not to like?

It turns out, lots.

Widespread homeworking is a technological, management and perhaps most significantly a psychological challenge. As our findings have shown, it keeps teams apart, isolates employees and chips away at company morale. Without the day-to-day interaction and understanding of how the company is operating, workers can start to feel less secure in their roles. Perhaps that's why face-to-face and collaborative work is now more valued than ever.

Rebuilding office confidence and restoring these broken links will be the greatest challenge facing architects and designers over the next few years.

Adaptable furniture will be crucial in providing the spaces necessary for individual and collaborative work. But above all, the focus will be hygiene. Even if Covid-19 is eventually defeated, partitions and some element of social distancing will likely become part of standard office design. Improved ventilation will be expected. And antimicrobial, easy-to-clean surfaces are set to surge in popularity.

Bringing these elements together in cohesive and enjoyable designs will be key to revitalising the office sector, restoring lost confidence in shared workspaces and delivering the productive environments companies need to survive and thrive.

"Bringing these elements together... will be key to revitalising the office sector."

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