

# Rethinking Workplace Part I

A RESEARCH REPORT



# Foreword

**“When we think about ‘the great outdoors’ we get a sense of wonder and adventure. We imagine time spent in the fresh air a positive experience. Yet our time outdoors tends to be limited. In fact, the office working population more typically spends 90% of their time indoors. Knowing this, we made it our mission a decade ago to understand how we can help create ‘The Great Indoors’. With a focus on health and wellbeing we set about designing flooring systems that counteract some of the challenges of being inside for such a large part of our lives.**



We recognise that since we started this journey, things have inevitably moved on. That today health and wellbeing in a wider ‘future of work’ context is as much about the emotional as it is the physical environment. We started by reflecting on our own interpretation of ‘wellbeing’ and challenging the industry category we proudly serve.

## Is ‘workplace’ the right term of reference?

It conveys that we carry out paid employment in one setting, which simply isn’t the case for most people. Yes, we spend 90% of our time indoors, but how we spend that time is changing. Technology has broken down the walls that constrain when and where we work. Now, we argue, mindsets need to follow suit.

Initial research tells us that the current treatment of workplace doesn’t cater for the degree of ‘flex’ that future talent craves. This is leading to a growing gap between how people want to conduct their lives and the office working reality. Our aim is to uncover how this trend is impacting from a health and wellbeing perspective and what organisations can do to cater for these evolving end-user needs.

The following report details the top level findings of some initial quantitative research we have carried out with 2,500 office workers across five European countries: UK, France, Germany, Sweden and The Netherlands\*. Here we start to explore what these findings mean for the design and specification of people-friendly spaces configured for a different way of thinking, acting and functioning in a workplace context.

Then, alongside architects, designers and end-user organisations, we hope to build on these findings to determine, together, how workplace settings can be redesigned to ensure that the indoors is indeed great and geared up for a completely new modus operandi.”

### Anette Timmer

Tarkett EMEA Marketing Director, Workplace

\*Additional research across further European markets is underway.

# Introduction





# Introduction:

## What is the Great Indoors Index?

**We wanted to understand what matters most to end-users. Only by uncovering frustrations with the current treatment of workplace can we close the gap between how people want to live and work and the office working reality. So we surveyed 2,500 office workers in five European countries to establish their version of 'The Great Indoors'.**

The research broadly covered the following themes:

- **How people spend their time**
- **What challenges they face in managing that time**
- **How fulfilled they feel in their current role**
- **What concerns them most about their main workplace**
- **When they feel truly rewarded**
- **How much emphasis employees' place on look, layout and location**
- **What issues workplaces need to prioritise to most closely align with staff values**

The Great Indoors Index is a measure of how parameters including gender, nationality, age and preferred working style impact on the way we think, act and function in a workplace context. The European-wide results offer a useful benchmark (our index), alongside which the individual country findings can be interpreted more meaningfully, locally.

In 'Rethinking Workplace - Part I' we focus on the physical environment - reporting on the design and specification considerations that, the research indicates, have a clear link with staff morale, employee engagement and, in turn, productivity levels.

Then, as we take the wider results to market, we'll build a picture of the bigger social trends that are influencing the human response to work settings in the here and now, as well as looking to what this means for the future of work and the ensuing commercial design opportunities.

## The Research





# The Research

An initial quantitative survey of **2,500** office workers across Europe.

**500** respondents from each of the following territories:



France



Germany



Netherlands



Sweden



UK

Additional research will be rolled out to further markets in future reports.  
Conducted in December 2017 by international survey house **OnePoll**.



# Executive Summary

**The research reveals that – when it comes to workplace design – health and wellbeing matter most to Europe’s office workers\*. Almost half (49%) of the surveyed population placed noise and indoor air quality as their top two priorities – overriding concerns with the look, layout and location of workplace settings.**

It also shows that, while open plan arrangements remain prevalent, 40% prefer working in a quieter space - indicating a strong need to better cater for different tasks and working styles – regardless of office layout.

Our research indicates that a significant proportion of Europe’s office-based employees are in some way disengaged:

- **45%** feel unfulfilled in their work.
- Nearly a quarter (**24%**) admit to being ambivalent about their job.
- Over a fifth (**21%**) report highly negative associations (“feeling like just a number” or “relieved to get through the day”).

These insights suggest that we need to completely redefine how we think about the ‘office’ as a destination - and what it is used for. Not least, as people spend 90% of their time indoors; working, learning or relaxing.

The result of reimagining the ‘central hub’ of an organisation could be significant, both for businesses and employees. However, there are many complex factors that contribute to perceived ‘happiness’ at work.

\*Based on our quantitative research of 2,500 office workers across five European countries UK, France, Germany, Sweden and The Netherlands

What is clear, though, is that the office needs to be a collaborative space. One where employees also know they can mentally ‘zone in’ without distraction. Get it right and the rewards could be significant.

Imagine if, through re-designing the traditional office environment, employee happiness could be boosted even by 1% or 2%. In a firm of 1,000 staff, that would mean 20 people feel happier day-to-day.

And, as a result, think of the productivity gains. Happier workers are at least 12% more productive - possibly even as high as 20% according to The Centre of Competitive Advantage in the Global Economy (CAGE) at The University of Warwick (UK).

Though CAGE focus more squarely on happiness and productivity at work, these types of research programmes can be used to draw meaningful correlations with the survey commissioned by Tarkett. We set out to explore the wider work and lifestyle trends that could be impacting on morale.

What we discovered is the need for the wider building industry and employers to work together to create the spaces and schemes that are good for people - and for the environment. A true ‘win win’.

To achieve this, we have to understand what employees really want, need and aspire to - through initiatives such as this research. Armed with insight we can help shape design briefs that bring relevant thinking to the fore to create positive, productive working environments.





# The Results

## The Results - A Snapshot

The point of the study was to understand how to make work spaces work better. Starting by first understanding employees' biggest frustrations in the here and now.

Taking the results in the 5 European countries, there is an even split between those currently working in open plan versus private office arrangements (39%)\*

There are some notable differences between the countries, however:

France	Netherlands	UK
<b>44%</b>	<b>40%</b>	<b>58%</b>
people are more likely to work in a private office		open plan settings are much more prevalent

**1/2** Half would prefer to work in a private office or co-working space

**1/3** A third would choose open-plan

**56%**

The majority of Europe's office staff never work from home\*

**28%**

prefer to work off-site when workloads are high

**63%**

believe they're at their most productive in the office, showing that people still want and need a place of work

\*Based on our quantitative research of 2,500 office workers across five European countries UK, France, Germany, Sweden and The Netherlands



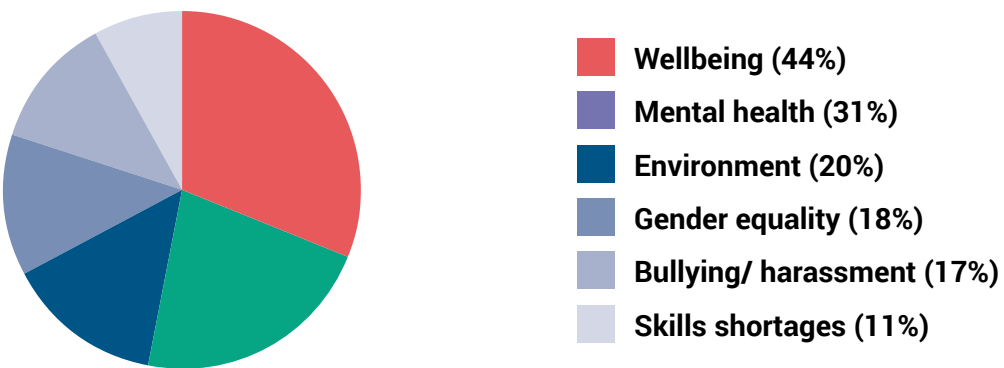


We asked Europe's office staff what concerns them most about their main workplace. In order of priority, here is how the research population answered:



- 48% cite either the look, layout and/or location of their current workplace a concern
- 57% admit their office doesn't look great and 23% say function is a problem
- Over a fifth (21%) place 'uninspirational decor and fittings' in their top three worries - believing dated interiors and furniture make organisations appear 'behind the times'
- The majority of 18-34 year olds place aesthetics as their number one concern (near a third)
- But for the rest of the office working population, the invisible matters most. Noise levels (27%) and indoor air quality (22%) were the top two concerns for Europe's office workers by a long way

Furthermore, we asked: "What do workplaces need to prioritise?"



More than anything, employees crave greater 'flex'

A third of people chose flexible working hours as the benefit they find most attractive – this came above any other perceived 'perk'.

# Optimising Office Environments

In the next section we take the following themes, as prioritised by end-users, and consider their impact from a health and wellbeing angle. We also start to unpick the variations between geography, gender and preferred working styles, in particular:

- 1. Health and wellbeing**  
With a focus on noise and indoor air quality, we found a strong link between these factors and employee happiness and productivity. Our findings highlighted that simple changes could lead to a wealth of benefits.
- 2. Form over function**  
Through analysing employee reactions to office aesthetics, we saw that although not the main concern, workplace interiors have an impact on staff productivity and wellbeing – mostly for those aged between 18 and 24 (Gen Z).
- 3. A different way of doing things**  
In a more flexible working world, people have more options than ever before. But are businesses offering all that they can? Whether employees are seeking a quiet space for concentration or a more collaborative environment, our research found that a mixture of formats could produce better results.



# THEME 1:

## HEALTH AND WELLBEING

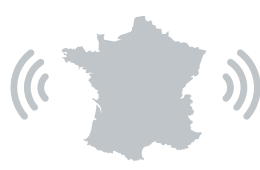
### NOISE & INDOOR AIR QUALITY

In almost all cases noise and indoor air quality were the top two concerns.

The scale of the perceived noise problem increased with the size of the organisation. Nearly a third of employees in businesses of 1000+ people cited it their top workplace concern versus, on average, a quarter of staff in smaller companies. In terms of the key geographical insights, we found:



Noise is the number one issue for every nation aside from the UK - though here it is still the second biggest frustration for a significant **24%**. In the UK, indoor air quality marginally takes precedence (**26%**)



In France, however, noise is far and away the most pressing workplace concern, with **30%** of office workers citing it the top worry and the number two concern (uninspirational decor) not even coming close at **19%**



In Sweden, noise is much less of a problem for men - only **19%** of office working males are troubled by the acoustics of their surroundings versus a third of Swedish women (**33%**). Conversely, Swedish men place uninspirational decor and fittings their top priority (**22%**), followed by indoor air quality and, lastly, noise

### Best Practice

With noise a key priority for Europe's workforce, it's also a core consideration for the A&D community.

When Nucleus Financial relocated to new premises in Edinburgh, it tasked Form Design Consultants with creating different zones for varying kinds of work.

In addition to a hot-desking area, sound absorbing pods were included away from the main office hub to help with concentration. The resulting space is the perfect solution to what matters most to Europe's workforce.



Tackling the indoor air quality and taking the results in the 5 European countries, the research also revealed certain segments of the surveyed population placed higher priority on the issue, namely\*:



**The post-millennials**  
(otherwise known as 'Gen Z'):  
**29%** of 18-24 year olds are worried about indoor air quality - making this the group displaying the highest concerns. This suggests it's an issue that's here to stay and is only going to grow in importance as the next generation of talent rises through the ranks



#### Public sector staff

Indoor air quality is the number one concern for employees working in government organisations. **28%** put it above noise (which is a concern for **25%**) - versus a fifth (**20%**) of those working in the private sector calling for air quality to be addressed (with **27%** more troubled by noise)



#### Corporates







**28%** of employees in organisations of 1000+ people - and **26%** of those with 500+ staff - chose air quality as the top concern. To benchmark, in SMEs with only 10-49 people, **17%** identified it an issue

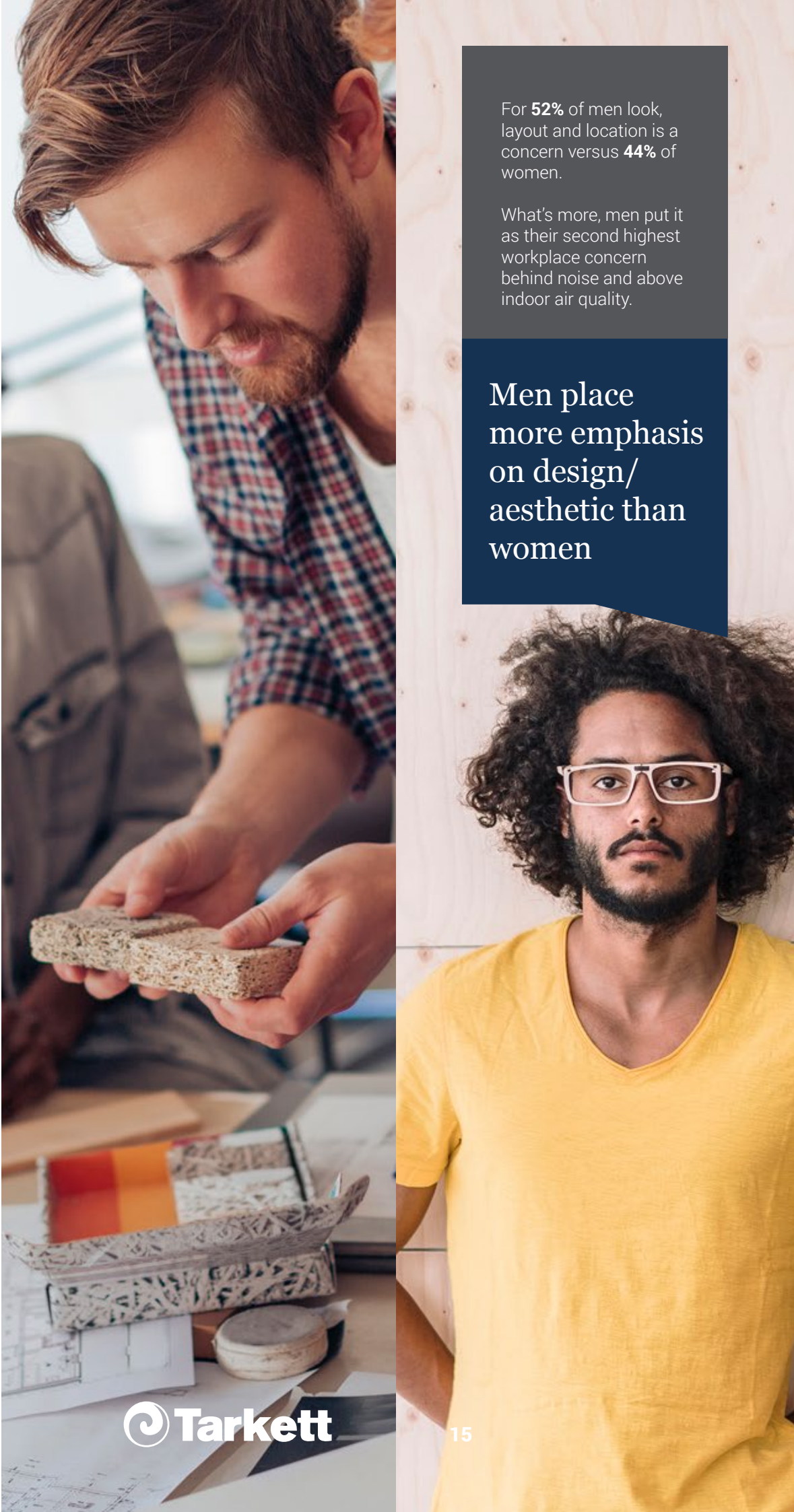
\*Based on our quantitative research of 2,500 office workers across five European countries UK, France, Germany, Sweden and The Netherlands



# THEME 2: FORM OVER FUNCTION

## DESIGN/AESTHETIC CONCERNS

-  Nearly half (**48%**) of Europe's office workers state the look/layout/location of their workplace setting is a concern
-  Form is more of a concern over function - **56%** of European office workers acknowledge their surroundings "don't look great" versus the **22%** that have functional frustrations
-  In general, Scandinavian style wins out across the board with **28%** preferring a well-ordered, minimalist influence
-  Collaborative and homely environments with interconnected spaces are the second biggest draw for **19%** (more popular in Sweden with **25%** electing for this look)
-  Bright, fun themed Google-esque builds are not as attractive with only **10%** opting for adult 'work hard, play hard' concepts
-  Dutch and Swedish employees are most proud of their workplace settings, with **49%** and **43%** praising the aesthetic appeal and functionality of their surroundings, respectively. UK office workers are most dissatisfied, with nearly a fifth (**19%**) admitting their office neither looks great or functions well
-  In Germany function wins out by a long way with **80%** recognising carefully thought through environments that fall down when it comes to form (only **29%** of Germans would rate their office 'look' highly)



For **52%** of men look, layout and location is a concern versus **44%** of women.




What's more, men put it as their second highest workplace concern behind noise and above indoor air quality.

Men place more emphasis on design/aesthetic than women

Q. Which statement best describes what you think about the decor and layout of your workplace?

Answer	EUR	SE	FR	DE	UK	NL
Functions well but doesn't look good	<b>45%</b>	32%	47%	60%	49%	38%
Looks great and functions well	<b>34%</b>	43%	29%	20%	27%	49%
Doesn't look great doesn't function well	<b>12%</b>	9%	13%	10%	19%	6%
Looks great but isn't functional	<b>10%</b>	16%	10%	9%	5%	7%

But while the geographical findings play into cultural stereotypes to a certain extent, the research challenges widespread perceptions relating to gender.

-  Swedish men are most concerned about uninspirational decor above anything else - **22%** place this as their number one workplace concern over noise
-  Look, layout or location is a concern for over half of Germany's male office workers (**54%**) compared to only **37%** of German women. Likewise, in The Netherlands, **43%** of Dutch men versus only **26%** of women
-  In the UK men are also more concerned with decor - placing it as their number one concern, above both air quality and noise. Women, however, are more scathing of their workplaces with **21%** saying it doesn't look great and doesn't function well (compared to **15%** of men)

"Some may be surprised to find that men place more emphasis on the aesthetics of their office than women – evident across all regions. But perhaps this is simply because women have alternative priorities. While men highlight uninspirational décor as their second biggest bugbear, women are more concerned with indoor air quality, and place function ahead of form."



## Best Practice

Office workers in Sweden and the Netherlands are most proud of their workplace settings. Both countries have a strong design heritage, carefully balancing form and function.

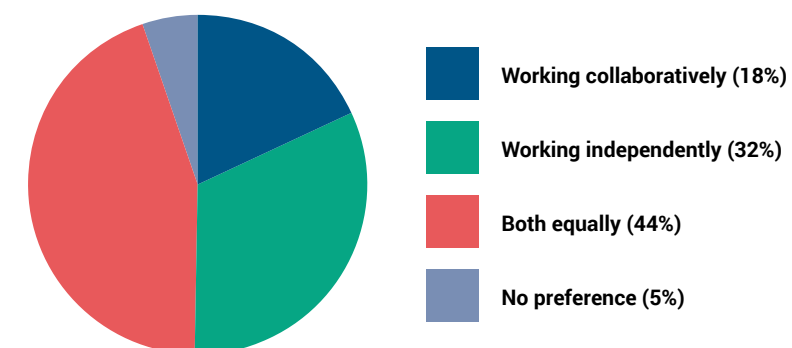
When interior designer Nanna Lagerman and her collaborator Nina Warnolf were recently selected to transform IKEA's Creative Hub in Malmo, Sweden, fuelling inspiration and encouraging office wellbeing was the core theme.

Reinterpreting a heritage building, the duo added simple, playful touches such as colour blocking to help instill a sense of calm and wellbeing to great effect.

## THEME 3: CONFIGURING FOR A DIFFERENT WAY OF DOING THINGS

### PREFERRED WORKING METHODS

While the majority of Europe's office workers equally enjoy working independently and collaboratively, of those with a strong preference, there are far more people that would rather work independently.



**This leaning towards a solo style is even more pronounced in The UK and Germany.**



In Germany, most people recognise themselves as independent workers (**43%**) - even over those with no preference or who consider themselves equally as productive in both scenarios (**34%**)



The UK has the fewest employees who would consider themselves as being naturally collaborative (only **10%**)

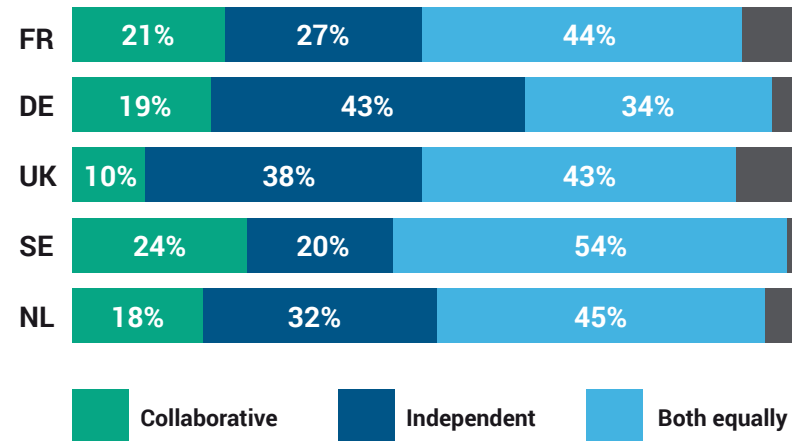


Sweden is the most adaptable nation with **54%** claiming to enjoy both approaches and no style being particularly dominant - although it is the only country where there are more people identifying as collaborative (**24%**) over independent (**20%**)








### Preferred working styles by country



### Accommodating different tasks and working styles

-  **52%** of those identifying as collaborative people would prefer to be in an open plan setting versus **22%** of independent workers
-  Over a fifth (**21%**) of independent workers don't consider themselves most productive in the office (versus only **13%** of collaborators). **74%** of team workers believe they perform at their best in the office
-  Work and home being in sync is more important to independent workers. **17%** put it in their top three factors influencing how fulfilled they feel at work, compared to **12%** of those identifying as collaborative. Furthermore, this latter group didn't see it as having any significant correlation (i.e. it doesn't feature in their top three)

"When looking at the geographic trends across working methods, it's clear that many offices are not catering to their employees' needs.

For example, workplaces in the UK are most likely to be open plan, but only 10% of British workers consider themselves naturally collaborative.

A possible result of this is low productivity, with the UK said to have amongst the lowest productivity rates in Europe. Expert Market's annual analysis of the world's most and least productive countries ranked it 17<sup>th</sup>.

In contrast, Sweden and Germany feature in the top 11, where private offices and smaller working areas are more prevalent to suit the preferred styles of these workforces."



Photo: Jack Shea Interior design: M Moser Associates

### Best Practice

Although only 9% of European workers are interested in Google's slant on office interiors, designers can still take an innovative approach in making spaces more creative and design-led.

For instance, in the Indonesian offices of advertising agency Ogilvy and Mather, designers M Moser Associates transformed a staircase into staggered workstations. The aim of this is to encourage greater collaboration through unplanned discussion.



## Concluding Thoughts

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There's no denying that the world of work is changing. The wants and needs of the modern workforce are more wide-ranging than ever before. And as a result of this, businesses must adapt in order to attract and retain the best talent.

With health and wellbeing topping the list of concerns for European workers – a theme that's increasingly being reflected in design trends – this seems the most logical start in promoting more productive office environments.

From the introduction of living walls to the implementation of quiet zones to support 'deep work', designers are constantly coming up with new ways to help improve employee happiness and wellbeing, and as a result, company productivity.

When looking at an overview of our research, we have uncovered five key trends:



### **Don't overlook what you can't see:**

When it comes to workplace design the invisible matters most to Europe's office workers - indoor air quality and noise were the top two concerns



### **Challenge stereotypes:**

Men are far more concerned with aesthetics than women



**Embrace everybody's space:**  
Independent workers are most constrained by the current treatment of workplace



### **Set boundaries that support flex**

People still want (and need) a designated work space - they crave structure yet demand flex



### **Style is substance:**

Look, layout and location have a crucial part to play in promoting a more positive working environment

Over the coming months, we'll be continuing to work with our esteemed A&D community and valued end-user customers to explore how our report findings can be implemented to achieve best practice.

We'll also be embarking on a number of initiatives to more fully understand the current treatment of workplace – bolstering our survey results with qualitative insights.

Our aim is to inform a healthier and more wellbeing-driven office environment for the future.

**We look forward to you joining us on this journey as we discover what constitutes The Great Indoors.**



# What is The Great Indoors?

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**A campaign centred on health and wellbeing in the workplace.**

Tarkett has long championed The Great Indoors concept. Its focus on creating healthier indoor environments began over a decade ago with a desire to help customers build people-friendly spaces.

Armed with the knowledge that we spend 90% of our time indoors, Tarkett is striving to take action to find out what matters most to people in an office environment.

Coining the term 'worklife', Tarkett believes that our personal and professional lives have never been more intertwined, with the technology-enabled 'any time, anywhere' approach blurring the lines between work and home.

Through The Great Indoors, we want to support the wider building industry - and employers - to create flexible workspaces that promote greater health and wellbeing for everyone.

In response, working alongside the A&D community across a number of platforms, Tarkett has launched **thegreatindoors.eu** – a hub for commercial designers, specifiers and workplace specialists.

The aim is to stimulate dialogue on what productive, enriching workplaces mean, and to encourage the sharing of best practice in workplace design across Europe and further afield. The collaborative platform will deliver robust insights in imaginative ways and share expert, third party opinion to add another dimension to the 'future of work' conversation.



**Get  
involved**

For further information and to find out how you can get involved as a guest contributor, please contact Marjolijn Verleg, Tarkett EMEA Marketing Communications Manager, Workplace on **[marjolijn.verleg@tarkett.com](mailto:marjolijn.verleg@tarkett.com)**