Rethinking Workplace #2

Shifting Perspectives
Post Covid-19

![Tarkett]

The Covid-19 pandemic has fundamentally changed the world of work. Now, there's an urgent need to understand what impact this has on commercial office design.

It's time to rethink the workplace.

Over the course of the pandemic, we've been tracking how people's views and experiences of work and the office are changing over time.

We have commissioned two global surveys of **2,800** office workers - each in collaboration with workplace consultants from WKSpace. This report explores key emerging themes from the second wave of the research alongside a number of third party reports and research - for a full list see the back of this report.

We have also included some initial thoughts on the post Covid-19 workplace from a number of European architects, designers and commercial workplace thought leaders. These qualitative insights have been gathered from a series of Tarkett webinars - hosted since the start of the pandemic - as well as one-to-one interviews with AWA's Workplace Strategist, Clark Elliott, and Dr. Eileen McNeely, Founder and Executive Director of the Sustainability and Health Initiative for NetPositive Enterprise (SHINE), Harvard T.H. Chan School of Public Health.

Office-based workers with **200** respondents in each territory:

Australia	Belgium	China	Czech Republic	Denmark	France	Germany

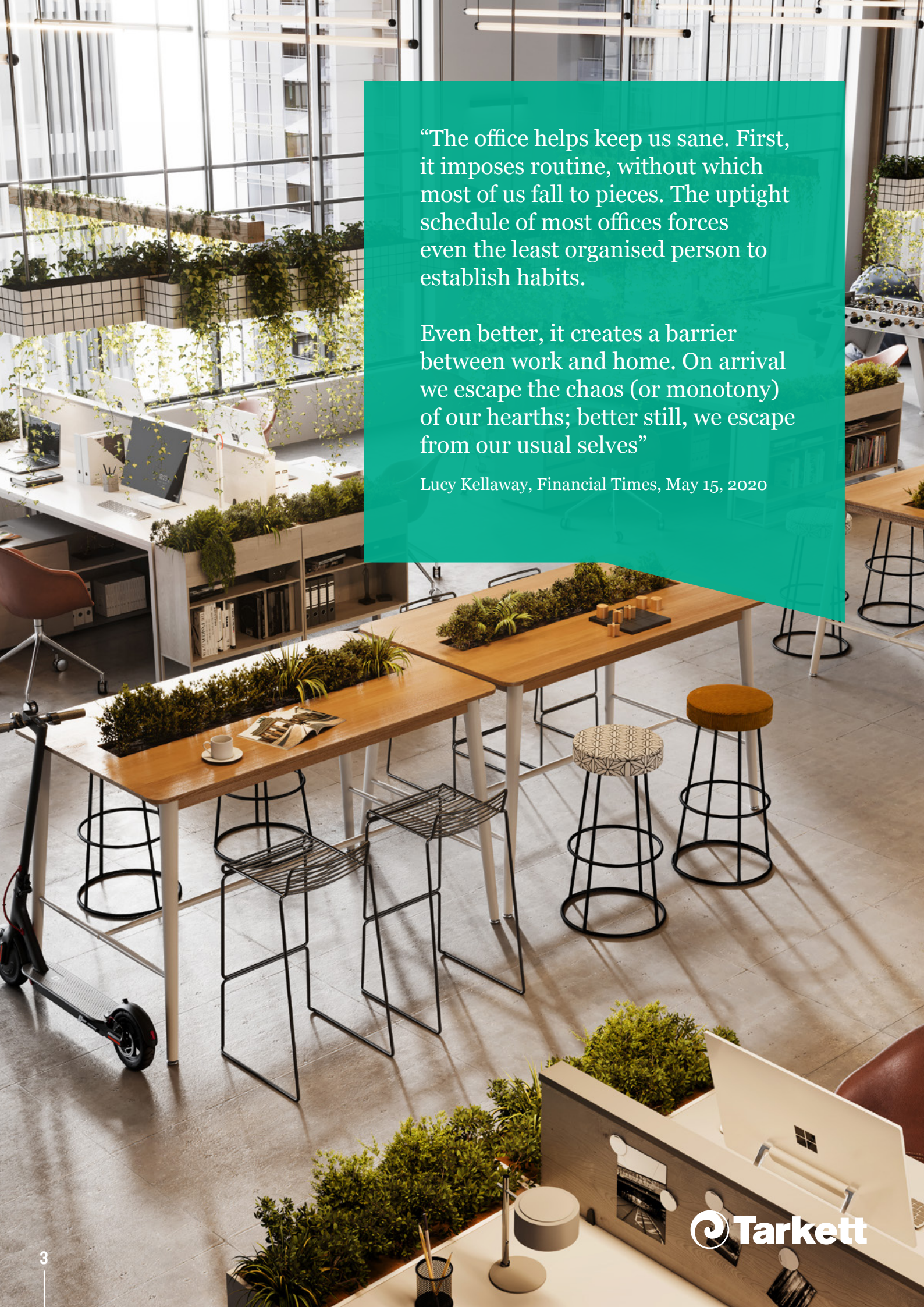| Italy	Netherlands	Poland	Romania	Sweden	UK	USA

What is Rethinking Workplace?

This initiative forms part of Tarkett's ongoing research project: '**Rethinking Workplace**' to understand how changing behavioural trends might impact on office design specification.

To date, we've gathered data from **12,700** office workers worldwide and hosted a series of focus groups, seminars and webinars with architects and designers to discuss our research.

This helps to inform how we - designers, specifiers, suppliers - can all play a part in making '**The Great Indoors**' indeed great and geared up for a new way of working.

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"The office helps keep us sane. First, it imposes routine, without which most of us fall to pieces. The uptight schedule of most offices forces even the least organised person to establish habits.

Even better, it creates a barrier between work and home. On arrival we escape the chaos (or monotony) of our hearths; better still, we escape from our usual selves"
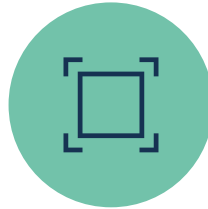
Lucy Kellaway, Financial Times, May 15, 2020

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Overview: What we found

**The office is
essential**

The post-pandemic working
from home shift may not be
as drastic as first imagined.
Employees are missing their
colleagues, technology - and
a choice of different spaces.

**Boundaries
are great**

Having a clear demarcation
between personal and
professional lives is good
for people's mental health
and productivity.

**The environment
in the spotlight**

Concerns about the
workplace's impact on the
environment are increasing.
The pandemic has
highlighted the importance
of protecting our planet.

"Home may be the primary office right
now but the office fulfils different
needs to what we're getting at home.

"It's only when you hit pause, that you
get the chance to re-evaluate what
those needs are. The office is not just
a space; it's an experience. Our offices
are great assets but to remain relevant
they need to be adaptable."

Ryan Ware, Co-founder &
VP of Construction, Vantis

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> "Technology has already collapsed the boundary between work and home. The office, at least, was a solid membrane between the two. And it may possibly be the last."
>
> Jennifer Senior, The New York Times, 17 May, 2020

Shifting attitudes to 'flexible' working

Blurred Lines

People all over the world have been forced to bring down the walls between their personal and professional lives over a prolonged period of time. Early on during the pandemic, the Tarkett Rethinking Workplace research suggested that employees were embracing being able to 'flex' between home and work life.

The research from both June and September 2020 indicated an increased appetite for a more fluid home and office set-up as the way forward. This was particularly evident in countries where this type of agile working wasn't mainstream prior to the pandemic.

For example, in September 2020, the UK saw a **57%** increase in people viewing this as the way forward, while Poland reported a staggering **158%** growth in converts. In China, respondents were the most strongly in agreement, with **90%** looking for a more flexible mix between home and office as the global crisis blows over.

However, the latest figures from workplace strategists WKSpace - who have tracked office workers throughout the pandemic - indicated that the long-term changes may not be as drastic as first predicted.

Their January 2021 research of respondents in the UK, Netherlands and the US show that employees are less inclined to want to permanently change the way they work than was first predicted. Their data indicated that office workers in those markets have only 'marginally' changed how they want to work going forward - **53%** in the US, **45%** in the Netherlands and **42%** in the UK.

[1] The Essential Office, WKSpace research, January 2021

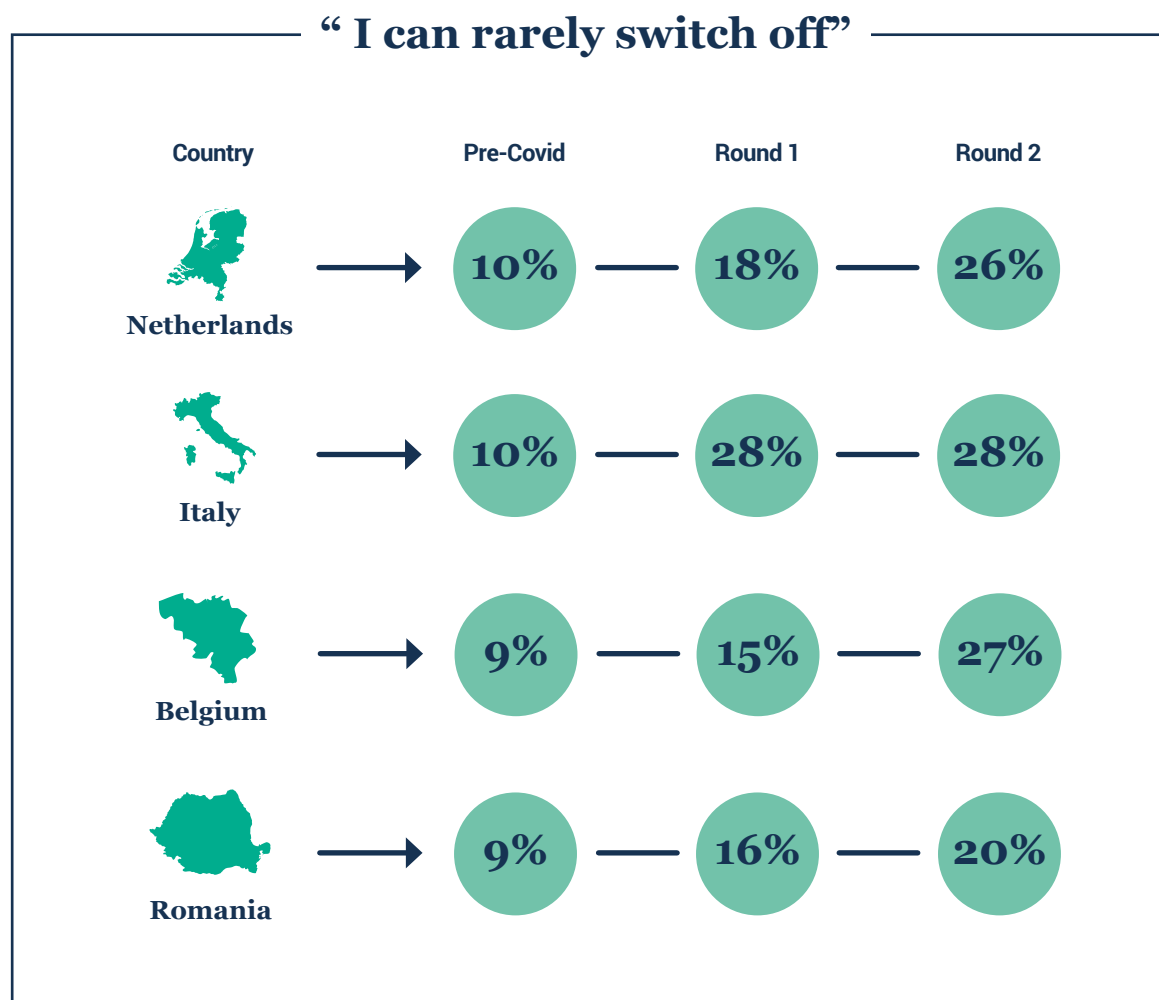**Tarkett**

Too much of a good thing?

While it's likely that the pandemic has shifted attitudes to home working in some of the more reluctant markets, for many employees and employers it has also shone a light on some of the drawbacks of not going into the office.

According to research by Cushman & Wakefield, **55%** of employees have felt disconnected from company culture and **57%** have felt that it's had an impact on their wellbeing.[2]

Similarly, Steelcase found that isolation is the leading factor that "worsened during mandatory work-from-home orders" for participants across the **10** countries surveyed (Australia, Canada, China, France, Germany, India, Mexico, Spain, United Kingdom, United States)[3]. This correlates well with our findings.

Always-on culture

Our latest round of Rethinking Workplace research also points to a lack of structure as employees struggle to draw a line, when the working day is done. **A quarter of Europeans say they're finding it increasingly difficult to "switch off". An increase of 67% compared to pre-Covid.**

" I can rarely switch off"

Country	Pre-Covid	Round 1	Round 2
Netherlands	10%	18%	26%
Italy	10%	28%	28%
Belgium	9%	15%	27%
Romania	9%	16%	20%

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Municipality Hollands Kroon, The Netherlands. Photography: Rika Looij. Architect: Crielaers & Company.

So, how are employees thinking about the office?

The question of productivity

What is becoming increasingly clear, is that people want more flex as to when they work but, when it comes to where they work, the majority are missing the office as an efficient and engaging environment. It's where they feel most purposeful and connected.

4 out of 5 say they do their best work in the office.

The Rethinking Workplace September data showed that across Europe as a whole, **30%** more people recognise that their productivity levels are higher in the office. This is most marked in the following countries:

+108%
Czech Republic

+49%
Belgium

+43%
UK

+35%
France

+30%
Netherlands
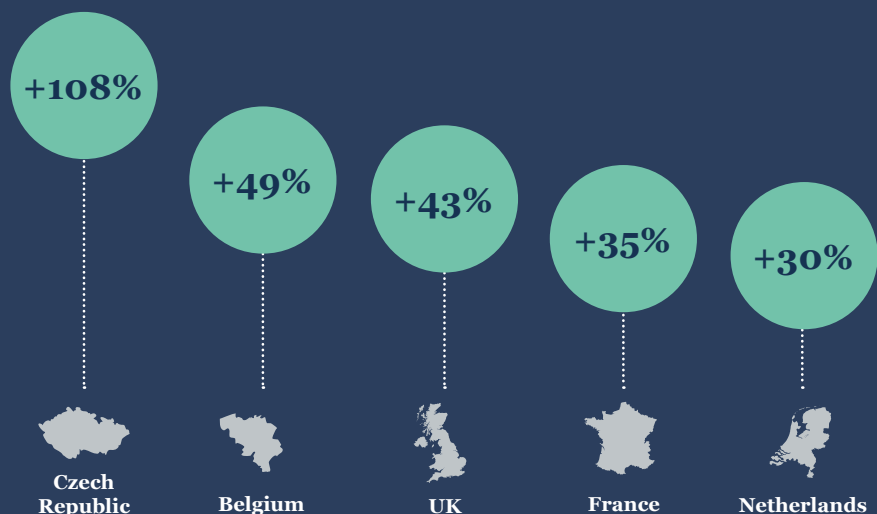
Tarkett, Rethinking Workplace, September 2020

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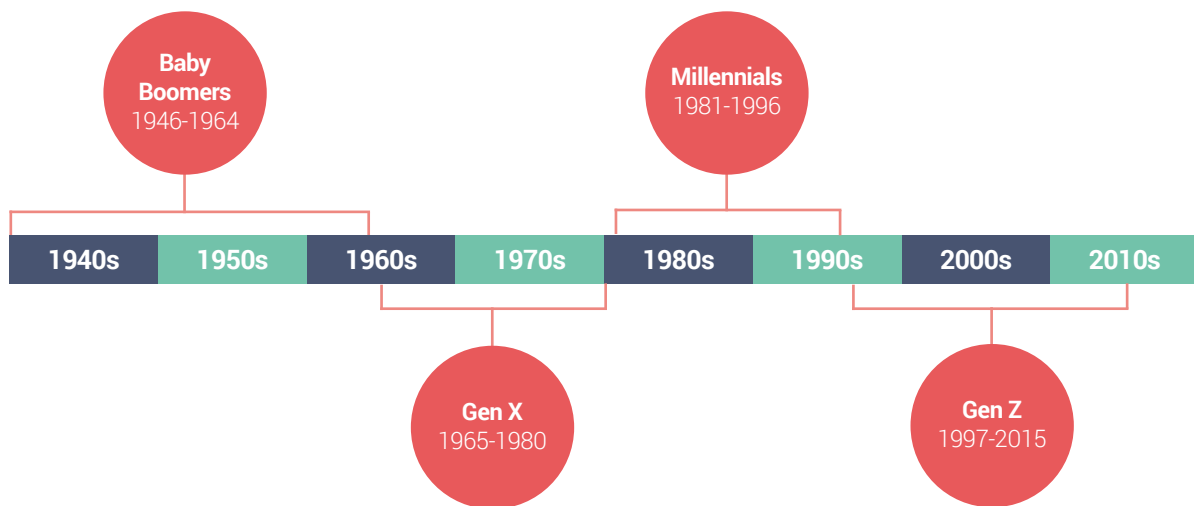# Younger generations are less productive at home...

Research from ISG, the global fit-out, technology and construction company, indicates that younger generations are more likely to recognise that their productivity has decreased while working from home.

Almost a third (**32%**) of younger generations (Gen Z and Millennial's) said that working from home makes them less productive. Only **24%** of older generations (Gen X and Baby Boomers) experienced the same. [4]

...and want to spend more time in the office

Working space is a big factor. Only **38%** of Gen Z say that they have an excellent or good working space at home, compared to **55%** of Gen X.

Perhaps because of this, Gen Z and Millennials were more likely to want to spend more time in the workplace to optimise their personal productivity, compared to Gen X and Baby Boomers.[5]

Baby Boomers 1946-1964

Millennials 1981-1996

| 1940s | 1950s | 1960s | 1970s | 1980s | 1990s | 2000s | 2010s |

Gen X 1965-1980

Gen Z 1997-2015

[4] The power of place: The impact of human behaviour, ISG, October, 2020
[5] The power of place: The impact of human behaviour, ISG, October, 2020

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What people miss most about the office

Steelcase, the global commercial furniture supplier, surveyed employees in multiple countries to discover why they want to return to the workplace.

Reconnecting with colleagues is the top priority for most employees surveyed, followed by a shared sense of purpose and the opportunity to work in a quiet professional environment.
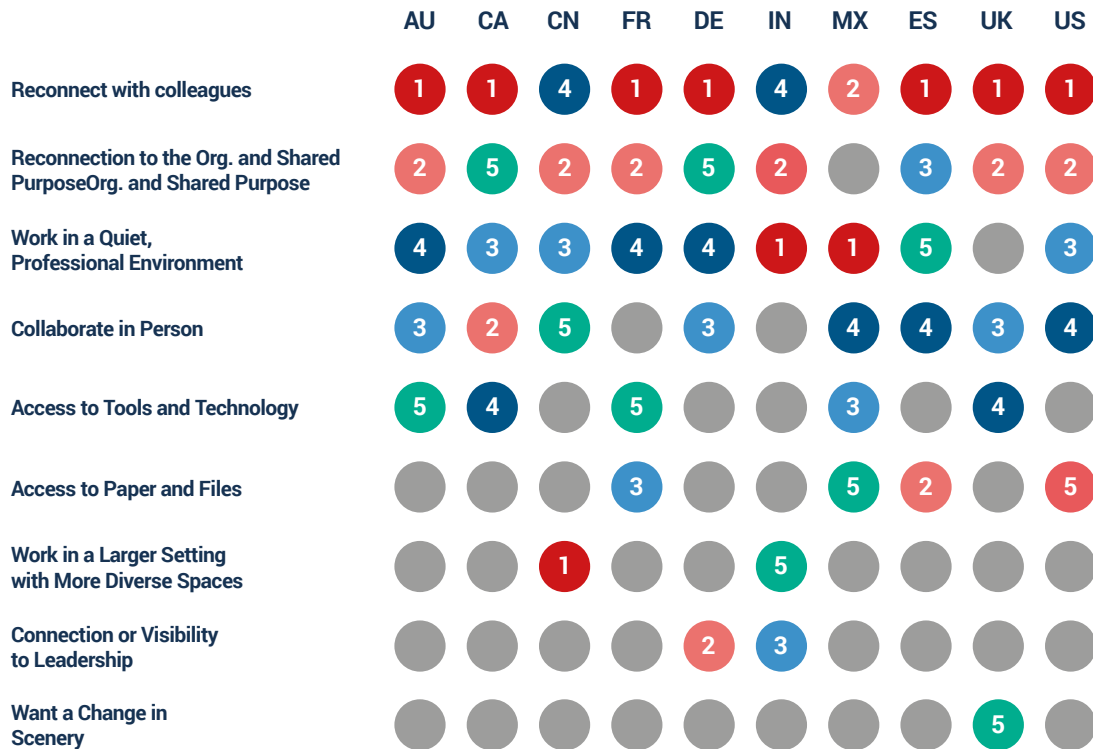
Access to facilities, including tools and technology, and larger, more diverse spaces were also important factors.[6]

> "In previous studies, we have looked at what people get from their work - financial security, dignity, meaning and purpose. But, what we didn't really think about - and what really surprised us in our research - is that people actually get more social connectedness and belonging from work than outside of work."
>
> Dr Eileen McNeely, Founder and Executive Director of the Sustainability and Health Initiative for NetPositive Enterprise (SHINE), Harvard T.H. Chan School of Public Health.

Top 5 reasons people want to return to the workplace

People ranked their top five reasons for wanting to return to the workplace out of multiple factors.

	AU	CA	CN	FR	DE	IN	MX	ES	UK	US
Reconnect with colleagues	1	1	4	1	1	4	2	1	1	1
Reconnection to the Org. and Shared PurposeOrg. and Shared Purpose	2	5	2	2	5	2		3	2	2
Work in a Quiet, Professional Environment	4	3	3	4	4	1	1	5		3
Collaborate in Person	3	2	5		3		4	4	3	4
Access to Tools and Technology	5	4		5			3		4	
Access to Paper and Files				3			5	2		5
Work in a Larger Setting with More Diverse Spaces			1			5				
Connection or Visibility to Leadership					2	3				
Want a Change in Scenery									5	

Most Highly Ranked **1** **2** **3** **4** **5** Least Highly Ranked

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What are office workers' key concerns regarding the office?

The Rethinking Workplace research tracks employees' key concerns in the office and the latest round of research shows that indoor air quality remains the number one worry across all territories. And not without reason.

Another noticeable trend is that environmental concerns are higher on the agenda across all territories since the start of the pandemic.

The results across the board chart an interesting change in priorities throughout the course of the pandemic.
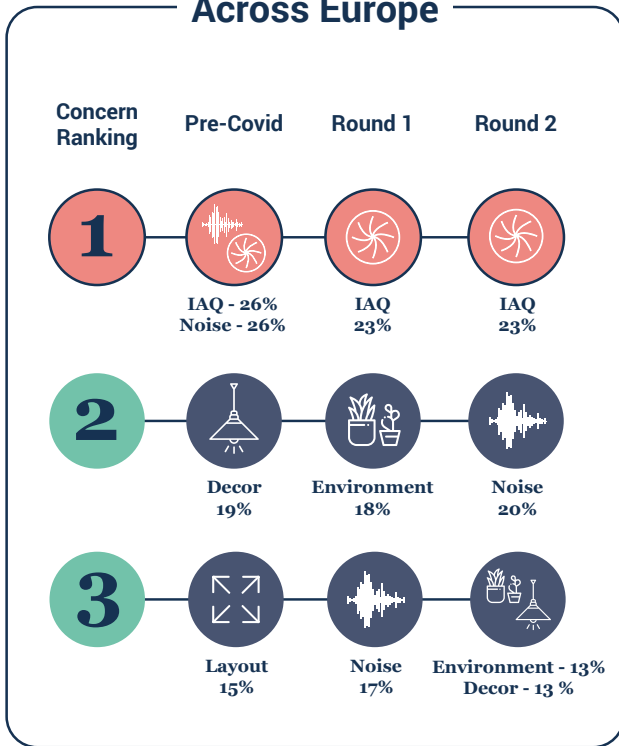
Air quality concerns are supported by medical science. Harvard University researchers have recently found that even small increases in long-term exposure to air pollution - particulate matter (PM) or fine dust - can heighten the risk of Covid-19 fatalities.[7]

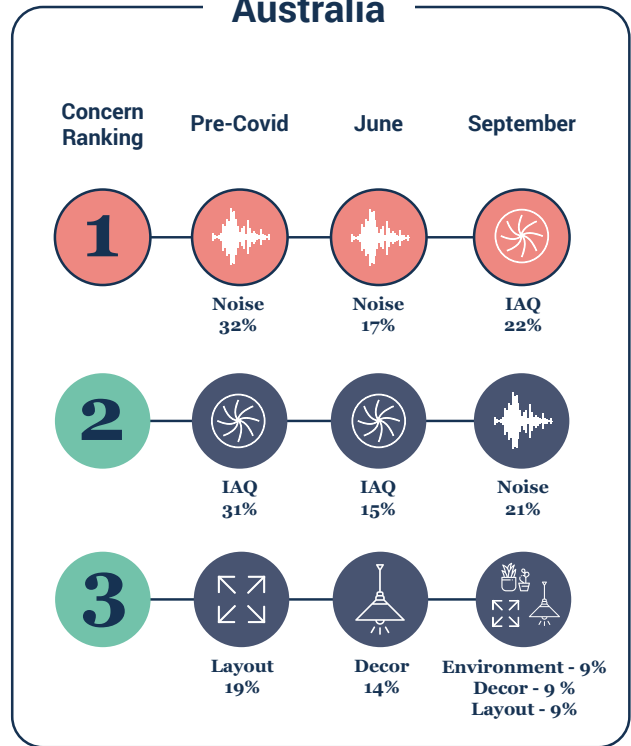[7] Harvard T.H. Chan, Air pollution linked with higher COVID-19 death rates, May, 2020

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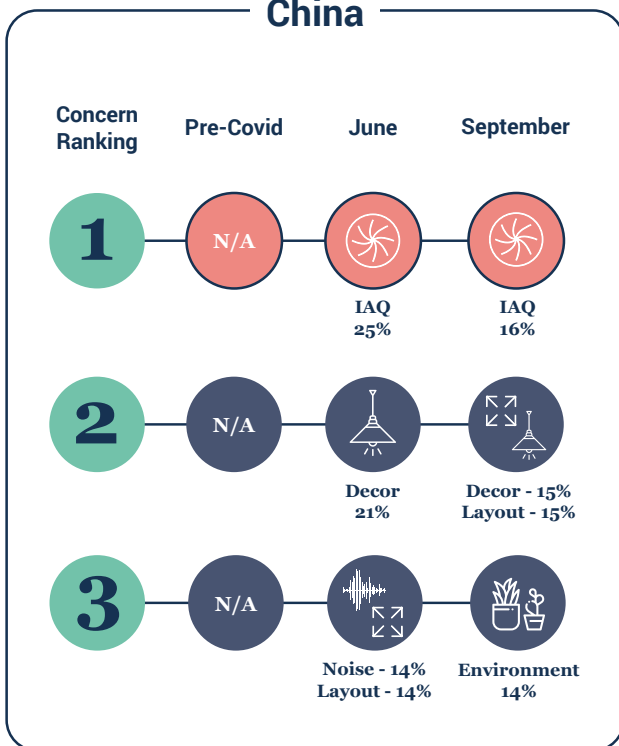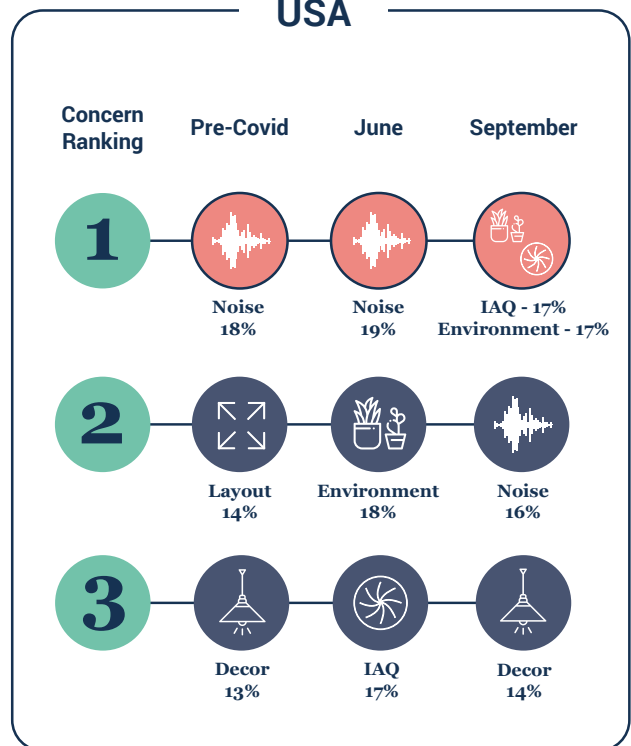# Office workers' key concerns regarding the office

Across Europe

Concern Ranking	Pre-Covid	Round 1	Round 2
1	IAQ - 26% Noise - 26%	IAQ 23%	IAQ 23%
2	Decor 19%	Environment 18%	Noise 20%
3	Layout 15%	Noise 17%	Environment - 13% Decor - 13 %

Australia

Concern Ranking	Pre-Covid	June	September
1	Noise 32%	Noise 17%	IAQ 22%
2	IAQ 31%	IAQ 15%	Noise 21%
3	Layout 19%	Decor 14%	Environment - 9% Decor - 9 % Layout - 9%

China

Concern Ranking	Pre-Covid	June	September
1	N/A	IAQ 25%	IAQ 16%
2	N/A	Decor 21%	Decor - 15% Layout - 15%
3	N/A	Noise - 14% Layout - 14%	Environment 14%

USA

Concern Ranking	Pre-Covid	June	September
1	Noise 18%	Noise 19%	IAQ - 17% Environment - 17%
2	Layout 14%	Environment 18%	Noise 16%
3	Decor 13%	IAQ 17%	Decor 14%

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> "Gen Z, in particular, is holding organisations to account. They expect businesses to be purpose driven and to attract the next generation of talent, employers need to respond and genuinely commit to doing the right thing."
>
> Dr. Mike O'Neill, Author & Founder of HumanSpace, Wisconsin

Moving forward sustainably

The fact that the most recent Rethinking Workplace research wave sees the environment emerging as a top three global workplace concern, for the first time, presents an interesting talking point.

The survey results suggest that, prior to the pandemic, office workers felt their employers were already doing 'enough' to protect the environment. This seems to be particularly true in markets often considered to be at the forefront of sustainability, including Scandinavia and the Netherlands. Here respondents highlighted other workplace challenges such as noise pollution more urgently.

However, the global crisis seems to have brought sustainability back into sharp focus for many. In fact, the latest January 2021 research from WKSpace, indicates that employees in the UK, Netherlands and the USA all think the workplace has a key role in making a positive impact on the environment.[8]

This was particularly the case In the USA, where half of the respondents thought that this is where the greatest strides towards a more sustainable world could be made. The Dutch and the British highlighted the workplace as a key contributor to environmental change, however also focused on the role of individuals. This included cycling or walking to work - and educating people more.

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[8] Office worker attitude to the office in the UK, Netherlands and the USA, WKSpace,

Design for diversity

No one wants poor air quality. Similarly, we are all invested in sustainability, whether we acknowledge it or not. But what are employees' shared preferences regarding the look and feel of the workplace?

The Rethinking Workplace research has a conclusive answer: there is no conclusive answer.

The 'one size fits all' office simply does not exist – neither within, nor across the various markets. Much depends on the nature of the work and the kind of people it attracts.

Every person is different and every office contains a unique combination of people. Only individual organisations – and, more importantly, their employees – can determine the optimum requirements for any space.

The office with 'something for everyone' includes spaces for collaboration and spaces for concentration. It maximises stimulation and encourages free flowing interaction with open layouts. It minimises distraction and offers quiet sanctuaries.

The workplaces that thrive will bring people together by continually celebrating their diversity and create great spaces where everyone can be their best and feel a sense of belonging.

"I think there is going to be a menu of choices; everyone can choose how they work and how best that is going to allow them to perform.

For some people who are introverts they might prefer to work from home more, and others who thrive in group environments and working collectively are going to seek out places to do that - and businesses will need to provide for that."

Clark Elliot: Workplace Strategist - Advanced Workplace Associates (AWA)

> "Companies have to be more resilient to cope with change - who knows what's next."
>
> Markus Heinrich: Director Smart + Connected Asia - Pacific - Steelcase

Key Takeaways

1. **Long live the office** - people recognise the real need for a dedicated place of work that allows them to reinstate some boundaries between their professional and private lives. Somewhere to connect with their colleagues, collaborate and have full access to all the amenities a professional environment offers.

2. **'Flexibility' is still king** - workers want greater flexibility in all areas of their work life - from working hours to working environment. Businesses need to tailor their spaces to suit a variety of individual needs and ways of working with just as much emphasis on supporting deep work - free from unplanned interruptions - as it does collaboration.

3. **Growing social consciousness** - the pandemic has accelerated social activism around wellbeing, sustainability and social change. Now, more than ever, workplace designers need to bring these factors into consideration.

As the world continues to adapt, we will keep monitoring the changing wants and needs of office workers.

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Third party research references

Purpose of place: History and future of the office, Cushman & Wakefield, 2020

Changing expectations and the future of work, Steelcase, January, 2020

The power of place: The impact of human behaviour, ISG, October, 2020

Harvard T.H. Chan, Air pollution linked with higher COVID-19 death rates, May, 2020

The essential office, WKSpace, January, 2021

Tarkett