

Rethinking Workplace #1

Shifting Perspectives in the midst of Covid-19

(June 2020)



 **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 next few months we will be tracking how people's views and experiences of work and the office are changing over time.

We are running three global surveys of **2,800** office workers in collaboration with workplace consultants from WKSpace.

This report explores key emerging themes from the first survey, which was conducted between 16th and 22nd June 2020.

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 who took part in a couple of focus groups hosted by Tarkett at the beginning of July, 2020.

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**' - which was first launched long before Covid-19 to understand how changing behavioural trends might impact on office design specification.

To date, we've gathered data from **8,900+** 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.

Find out more [here](#).

Overview: What we found

“The office is going to be more of a place to ‘meet’, than a place to ‘produce’. Production can be done in many other places”

Francesco Messori: Founder
- D/Dock Architects



The office is essential

The majority of respondents in the Tarkett June research across all countries believe that they are most productive in the office - and this trend has actually increased post Covid-19



Collaboration and face to face team work is key

Office workers all over the world seem to have missed working together face to face - they now want a workspace that enables them to come together and collaborate



The office should be different from home

When it comes to style, office workers want their workspace to reflect the culture of the business with corporate and ‘bright & fun’ settings growing in popularity since the pandemic



Indoor air quality emerges as a key concern

Respondents were very split on what worried them the most about their workplace, however taken as a whole indoor air quality nudged ahead and office workers seem less bothered about office noise than before Covid-19

“I think we have a big opportunity leveraging technology to rethink the office and enhance the experience for people. It’s about creating variety and choice with an activity-based approach, using data based insights and technology to optimize the space, to really give the people what they need, rather than what they want.”

Markus Heinrich: Director Smart + Connected Asia-Pacific - Steelcase

How has Covid-19 impacted on attitudes to worklife and flexible working?

Blurred Lines: Balancing Work & Life

During lockdown, people all over the world have been forced to work from home, completely bringing down the walls between personal and work life. So how have office workers been coping with this shift?

The vast majority of the people we surveyed see the convergence between home and work life as a positive. The pandemic seems to have particularly shifted Europeans' opinions in favour of flexible home working. The results in the latest survey have almost

brought them in line with their peers in Australia and the US, where flexible working has been the norm long before Covid-19.

However, the British seem to be feeling the strain of lockdown, with the percentage of people feeling that the overlap goes "too far" and that they "can rarely switch off" has nearly doubled since Covid-19.

Perhaps surprisingly, while the Chinese respondents agreed that the ability to 'flex' work and home was a positive development, they also felt that they managed to keep work away from home well, with over half saying they were 'strict' about it.

79%

of European office workers see the convergence of home and work life as a positive (vs. **53%** pre-Covid)

81%

of office workers in China see the convergence between work and home life as a positive

25%

of UK office workers now feel that the overlap between work and life goes "too far" and that they "can rarely switch off" (this has increased from **13%** pre-Covid)

51%

of office workers in China say that their work life doesn't overlap with their free time

"Only 12% of U.S. workers want to work from home full-time. Most want to return to the workplace, but with critical changes."

Gensler Research Institute*

*Gensler Research Institute - survey of 2,300+ US workers conducted online via an anonymous, panel-based survey from April 16th - May 4th 2020."



“74% say the people are what they miss most about the office.”

Gensler Research Institute*

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

A growing appetite for ‘doing good’

Flexible hours remain the most sought-after perk in all countries. However, the pandemic also seems to have generated a heightened sense of goodwill and community spirit amongst office workers.

Across Europe and the USA there was a marked increase in the number of workers who said their ‘top perk’ would be additional leave for volunteering. The Australians also seemed to believe this was more important now than before.



28% of Chinese office workers see flexible hours as the most desirable work perk - additional days leave for pursuing interests were also a close second at **27%**



14% of European and **15%** of US office workers would like ‘additional leave for volunteering,’ a significant shift from the previous survey. While **12%** of the Chinese and **7.5%** of the Australians picked this as the most attractive perk



47% of Australian respondents also thought flexible hours was the most attractive benefit

So, how are office workers thinking about the office?

The question of productivity

In the aftermath of the pandemic, an overwhelmingly majority of respondents said they were most productive in the office.

There was a huge uplift here compared to the pre-pandemic surveys, suggesting that after being forced to work from home full time, office workers now see the value of the office environment. This aligns with the recent findings of the Gensler Research Institute which found that younger generations are less productive at home and less satisfied with the work-from-home experience.



90%+ office workers in Australia, the USA, and China say they are most productive in the office



87% of European respondents also believe they are most efficient in their workplace



There was a **38%** increase in US respondents who now believe they are most productive in the office vs. the pre Covid-19 results



The UK and Australia saw a **25%** increase in office workers who feel they are most productive in the office

“Without going or being forced to go into the office, we have freed a lot of time. So maybe now the office can become a space with more areas where a lot of things happen, not only the work. So maybe a place for socialising, wellbeing and maybe producing other forms of products”

Francesco Messori: Founder
- D/Dock Architects



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

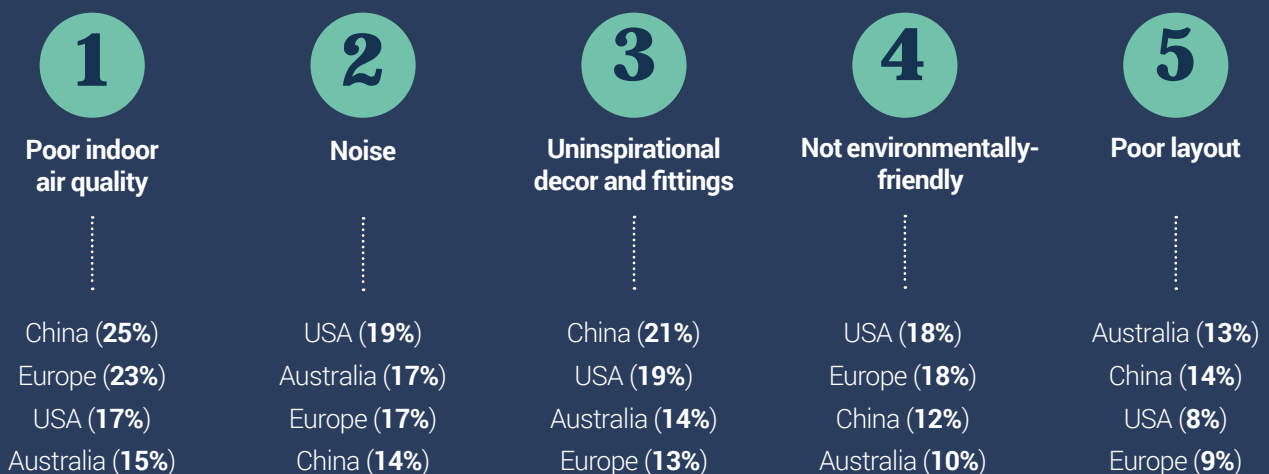
What are office workers' key concerns regarding the office?

The top concern across all respondents was indoor air quality followed by noise. This is perhaps unsurprising, given that Harvard University researchers have 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.

That said, it was a tightly run race, with fluctuating trends across different regions.

For instance, worries about the environmental impact of their place of work increased significantly in Europe and the USA, while the Australians were much more concerned with the indoor air quality this time around.

However, working from home seemed to have improved the Australians noise tolerance - dropping from **32%** to a mere **16%** as a 'key concern'.



So, what kind of office space do workers want and has this changed?

We're in it together

Office workers are clear - they want to be together. During lockdown they have missed the personal connections previously enabled by seeing colleagues in the office. This perhaps explains why 'open plan' design solutions were the most popular in all the markets (**49%** overall) with the greatest surge in Europe when compared to the pre-Covid survey results.

It seems respondents are longing for a collaborative environment where they feel part of a team and where it's quick and easy to communicate – without technology getting in the way.

As it stands, they are not interested in working from home full time either, with a tiny minority (**9%**) making this their 'ideal' workplace.

Open plan settings have grown in popularity: **+30%** in Australia, **+55%** in the USA and **+76%** in Europe vs. pre Covid).

"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."

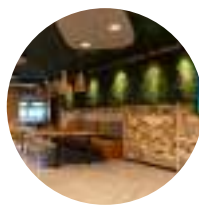
For some people who are introverts they might prefer to work from home more, and others who thrive in group environments and working collectively are going to seek out places to do that - and businesses will need to provide for that."

Clark Elliott - Senior Consultant,
Advanced Workplace Associates (AWA)



1. "Google-esque" workplace environments

This was the preferred choice in China (**35%**) and the USA (**26%**).



2. "Back to nature" style offices with "wood cabins or converted barns"

The majority of Australian office workers (**19%**) opted for this style of office.



3. "Collaborative & homely"

Homely office designs were the preferred choice for the majority of European workers (**30%**).

Style preferences

There also seems to be a growing desire to keep office spaces distinctive from the home with "Google-esque" design and more traditional 'corporate' spaces gaining in popularity.

Europeans office workers were the only anomaly to this trend, as they gave 'collaborative and homely' environment the biggest 'thumbs up'.

However, there was no clear preference of office design style as a whole. In fact, the Chinese were the most decisive with over a third preferring a themed "Google-esque" office.

Key takeaways

“Change is not going to be achieved by a leadership team telling people: “This is what we are going to do now”. It requires a collective shift of hearts and minds with everyone moving towards the same common purpose.”

Hannah Nardini, Workplace Strategist - WKspace



The office is essential

1. **The office is essential** - but its function has changed. The focus now should be on creating an 'experience' to accommodate different ways of working.
2. **'Flexibility' is still king** - workers want greater flexibility in all areas of their work life - from working hours through to working environment, and designers need to tailor their schemes to suit a variety of individual needs and ways of working.
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.



ABN AMRO Amstelveen, The Netherlands. Architect: Koppes Bouwkunde

Tarkett Human – Conscious Design™

As the world continues to adapt in response to the new challenges that have arisen in the wake of the global pandemic, we will keep monitoring the changing wants and needs of office workers as we explore the future of human conscious design.

Look out for the second phase of our research coming soon.

“Companies have to be more resilient to cope with change - who knows what's next.”

Markus Heinrich: Director
Smart + Connected Asia -
Pacific - Steelcase



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