

Re-entering the workplace

COVID-19
Survey results



Introduction



In April we began collecting data from global real-estate professionals and leaders in client organisations to understand the impact of working from home on business performance, and gain insight into how this might shape the future of our workplaces. This document summarises our findings from over 500 contributors.

As with all data, it's important to note that this is not representative of everyone.

If you want to find out how your team has experienced the change or is feeling about the transition, let me know. We would be happy to conduct a similar survey for your organisation.



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Forecasting now & beyond

In January this year, we identified the trends that would carry workplace design through 2020 and continue to evolve over the coming years - from behaviour-based design to the significance of mental wellbeing and the impact of digital integration. But since March, COVID-19 has rapidly accelerated progress in the ways we live and work.

Working from home has forced us to accept a new wave of change very rapidly, by enhancing flexibility for employees and embracing new technologies.

In April, we conducted a survey of leaders and real-estate professionals around the world about pre-COVID flexibility, the current realities of remote work and how to transition into the next phase of workplace.

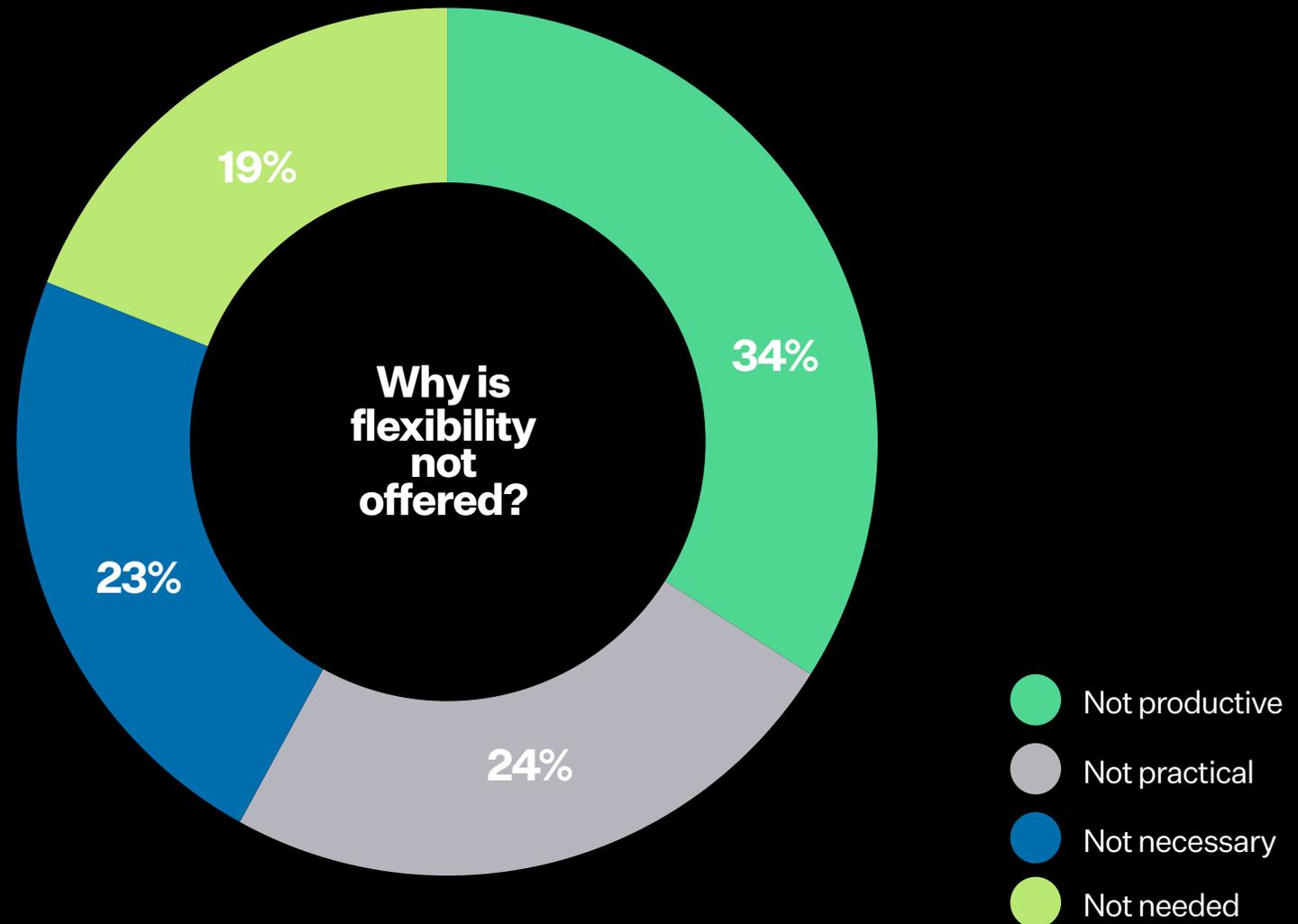


Working from home realities



A third of the global respondents said their companies did not offer flexible working policies before COVID-19.

Some noted that their organisations considered working from home impractical, while others cited productivity as the primary reason for low levels of flexibility.

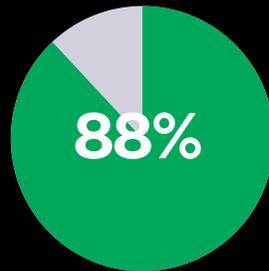


The ripple effect of working from home

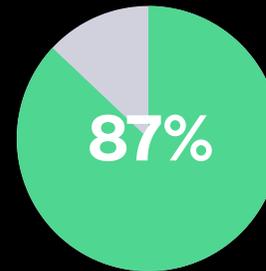


The report shows that there has been no significant decrease to individual productivity or communication. In many cases, this will mean that organisations can no longer argue that increasing flexibility for employees is impractical or unproductive.

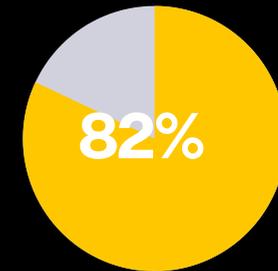
However, we must remember that the success of working from home benefits from past and present organisational support. Established relationships and team culture were developed by time together in the workplace. Bigger challenges will be seen with onboarding new people, and most participants recognise that a balance of remote and office working will provide the best of both worlds.



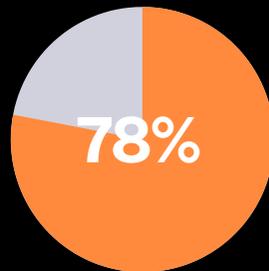
Personal productivity



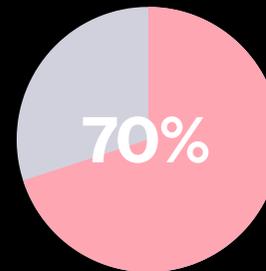
Team productivity



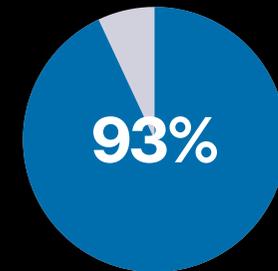
Effective communication



Job satisfaction & happiness



Balance & wellbeing



I feel supported

Factors of performance



Productivity gains

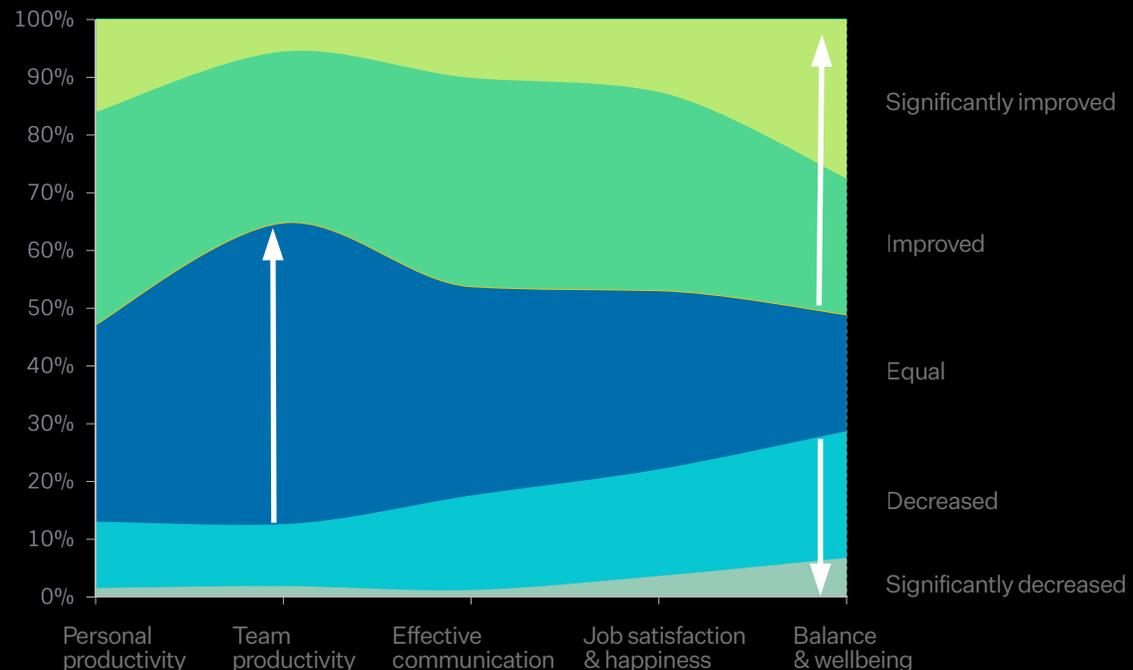
Overall, people perceived an increase in productivity. 89% enjoyed consistent or improved productivity within their teams, with similar results for personal productivity. Despite challenges of a pandemic such as disrupted structure and routine, 16% report significant improvements in their productivity while working from home.

Communication skills

Internal and external communication was positive, with results suggesting virtual communication methods have been adopted and well used. In the past, we have seen a resistant minority lagging behind, but the study suggests that they have become adopters.

Job satisfaction and happiness

Perceptions of employee wellness and satisfaction remain mostly positive. Based on the survey data, we might conclude that a sense of happiness was maintained by the autonomy gained from working from home, and linked to a positive company culture and support network. In total, 93% of participants felt supported by their organisation. There are certainly challenges with working remotely for long periods, but the study highlights a remarkable resilience.



Wellbeing and balance

However, we see the most variance in wellbeing. This factor is also shaped by personal circumstances, including health, family and locational comfort.

More information is required to assess the cause, but blurred boundaries and overworking may have contributed to a decrease in wellbeing. Bloomberg reported that people are working an extra 3 hours a day, as the “pandemic workday has obliterated work-life balance”.

How people experienced working from home



This is not the new normal

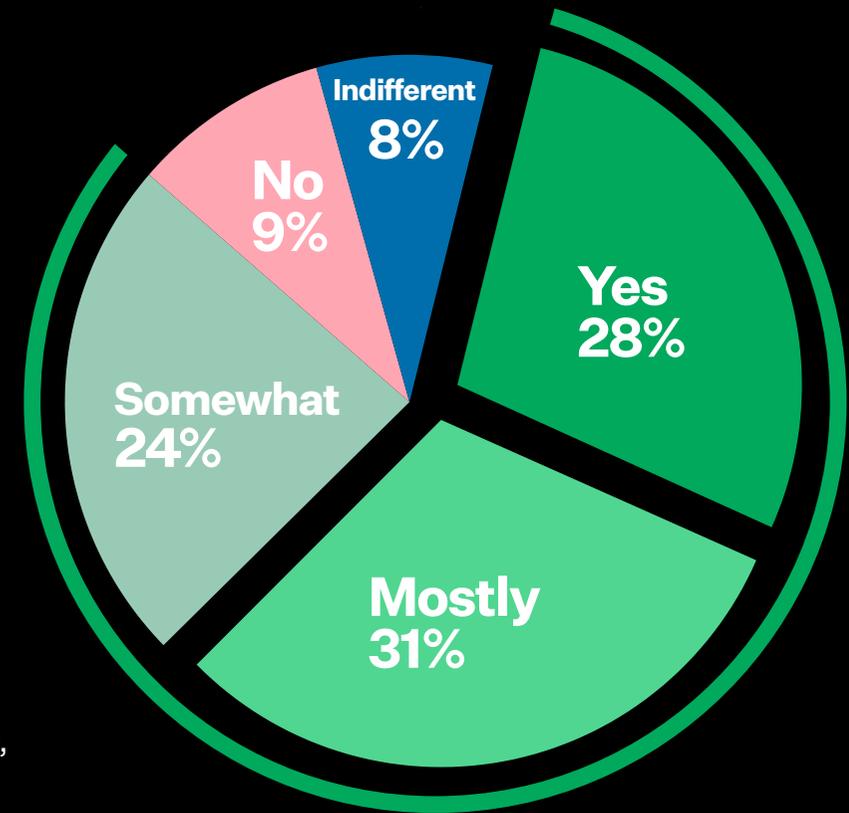
We caution that the “laboratory” effect of shared experience may sway the results.

Remote communication has been mandated by health guidelines, so it’s been a united experience with managed expectations. While we are remote, teams are problem solving for distance, and we all expect VC instead of face-to-face interaction. Challenges may arise when the workforce is dispersed and teams are divided between the office and remote locations. Expectations of attendance may return when one person’s flexible schedule impacts their team’s progress. As we consider the next phase of organisational agility, we need solutions that employees can buy-into, while maintaining team transparency and a suitable structure.

“My main concerns revolve around the commute, rather than the office environment itself.”

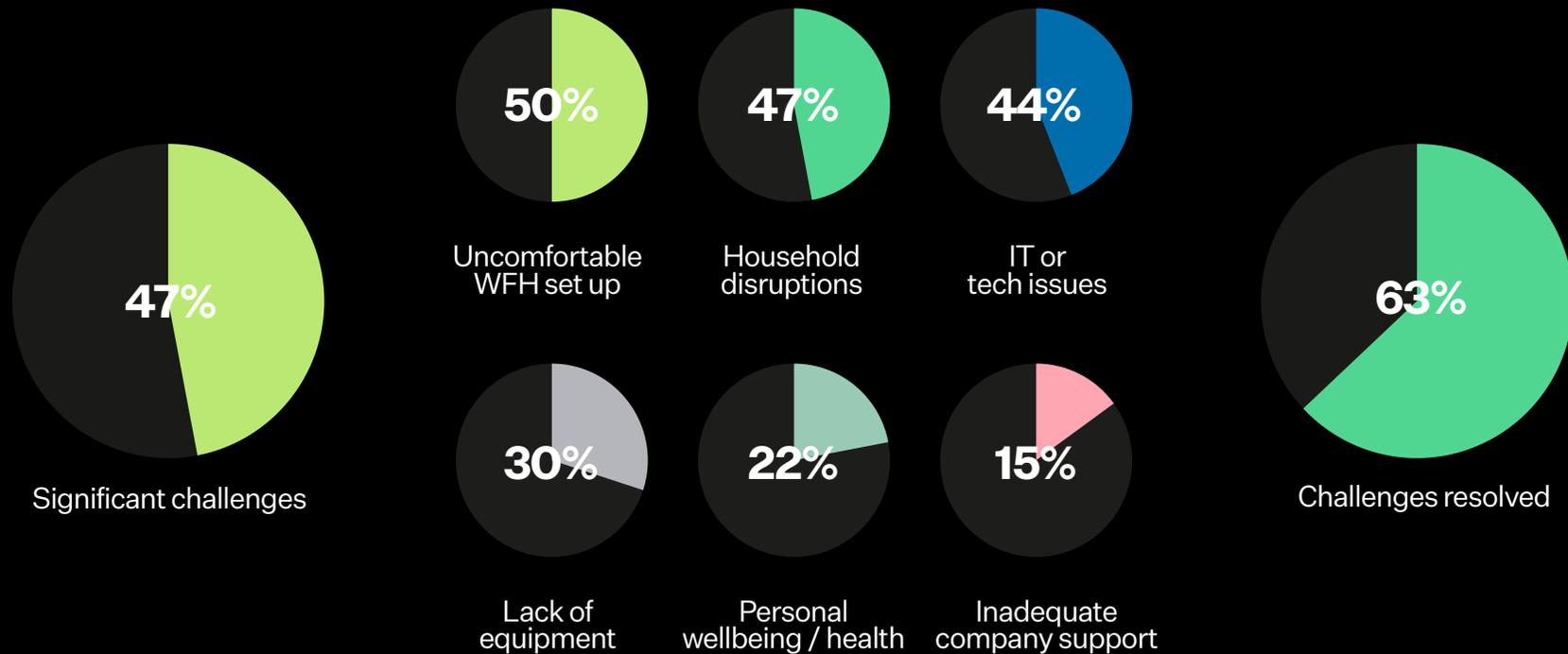
Anticipate return-resistance and adjustments

While most enjoyed working from home, many highlighted concerns about returning to long commutes and losing their “freedom”. We can conclude that people will seek to retain the benefits even after offices re-open. People are more likely to return if the purpose and function of the office is clearer defined in future. This requires positive culture, empathetic leadership, safe environments and motivating spaces to return to.



83% have enjoyed working from home

Key challenges



The root of the problem

An uncomfortable home office set-up was identified as the leading issue for employees. Especially among those who do not have a dedicated workspace or ergonomic seating. Following this was household or family disruption, especially for those living in high-density housing or shared spaces.

Challenges, threats and opportunities

Almost half of our participants experienced significant challenges and many of those have not been solved. In contrast, the workplace can offer refuge from distractions, comfort and technology beyond what the home can provide. Despite home comforts, residential spaces are not designed for work, whereas offices are designed as performance-driven environments.

Solutions

- Assess the provision of equipment and financial allowances for the improvement of home workspaces, reducing the burden of cost on employees.
- Balance time between office and remote working. Studies show that working from home up to 3 days a week is optimal and after that, productivity suffers.
- Solidify flexibility in company policy to allow people to move further from urban centres.

How people want to work in future



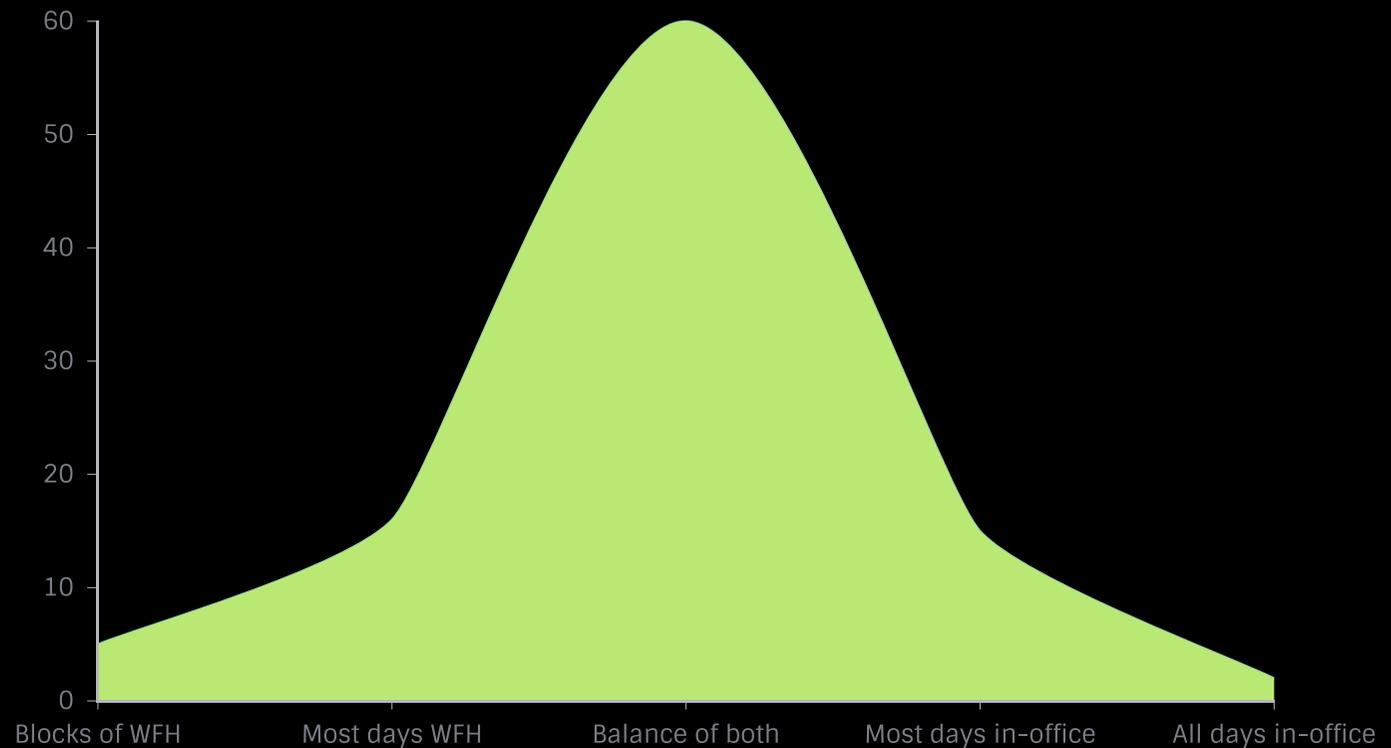
60% want to balance office and home working to suit their productivity needs.

As clearly demonstrated by the results, employees want a better balance. Many businesses may elect to blend remote and office working after lockdown ends, but this won't appeal to everyone.

Some prefer the routine, discipline and camaraderie of the workplace; especially if their living conditions are not supportive. We have seen high numbers of respondents in Asia wanting to return to the workplace full-time.

Either way, new options now exist, new solutions have been adopted and each organisation will have to negotiate its own terms with employees.

In the future, my ideal arrangement would be...



Negotiating the change

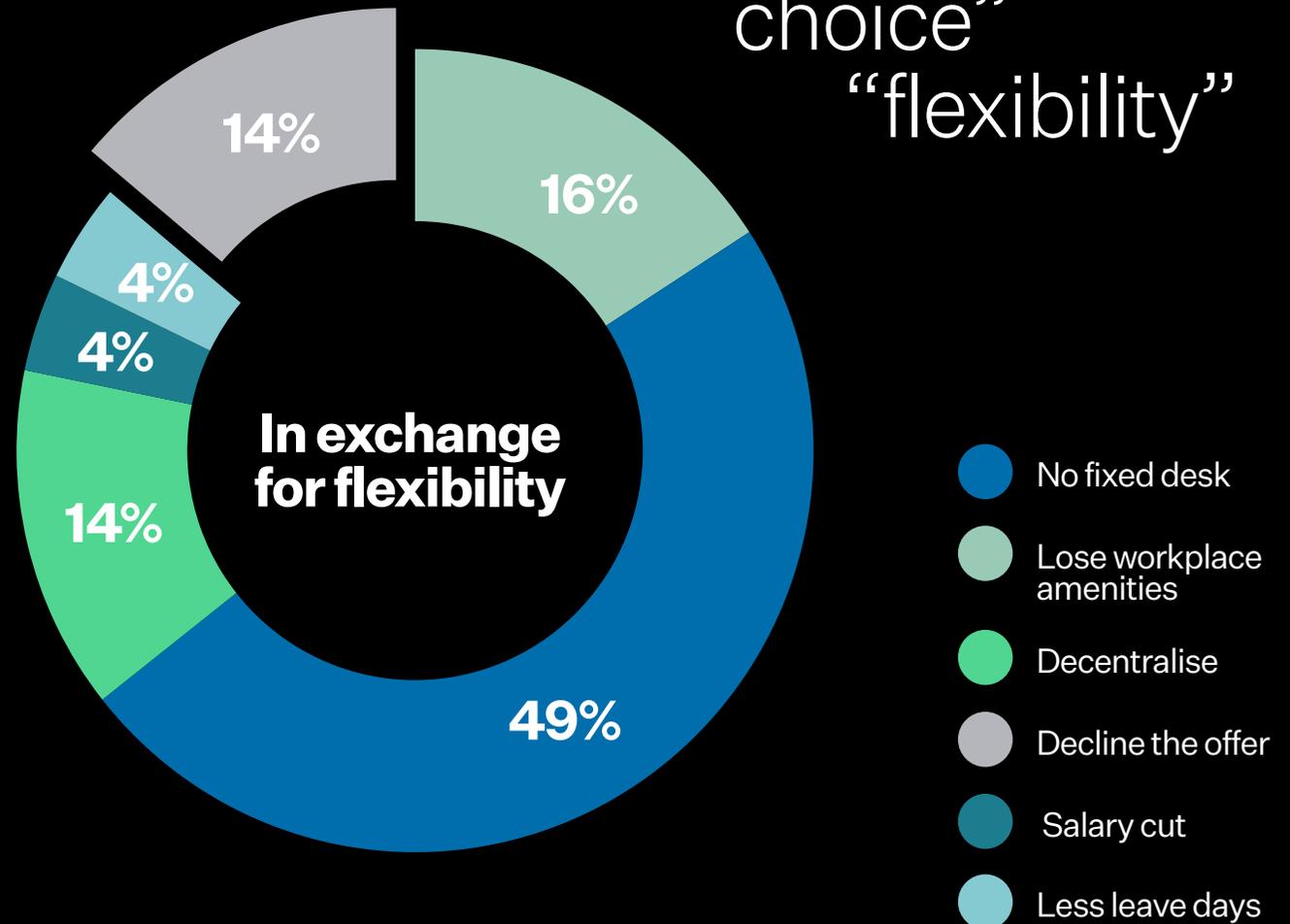


Flexibility is key

A majority of 86% would forgo benefits in exchange for improved flexibility. Many employees would give up existing assigned workstations and private offices. They would also be more willing to decentralise in the future. Small numbers would reduce their pay or annual leave days, so the biggest changes will be environmental. The important take away is that increased flexibility is highly desirable, but does not mean people want to work remotely all the time. Rather it means more choice, trust and autonomy.

How to make it work

Most want “structured choice” in the form of pre-planned and self-selected days of remote working for each individual or team. Following this, is the choice to work remotely as and when required. Other top considerations include a condensed 4 day work week. Overall, employees favour flexibility of location over flexible work hours.



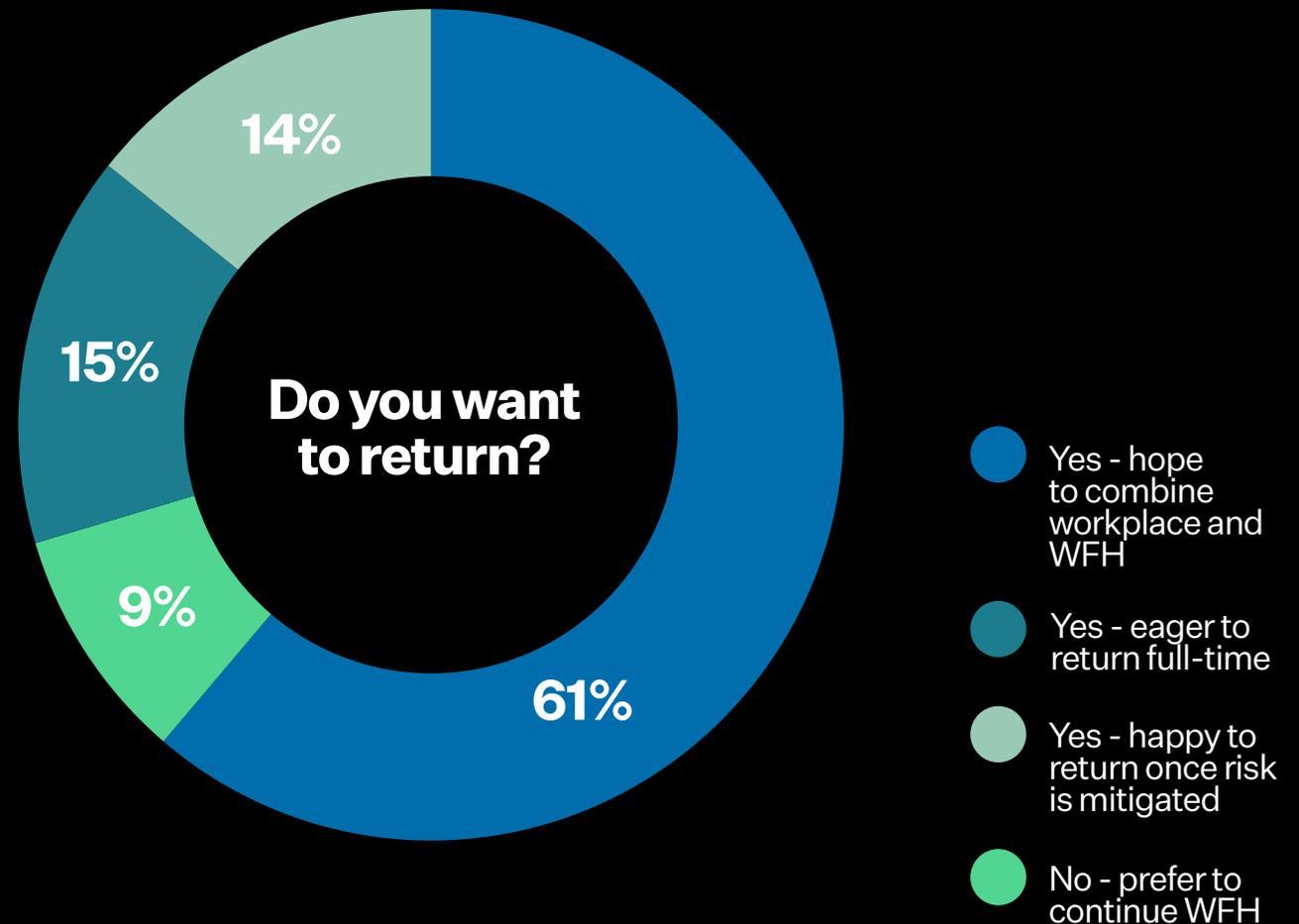
Flexible futures



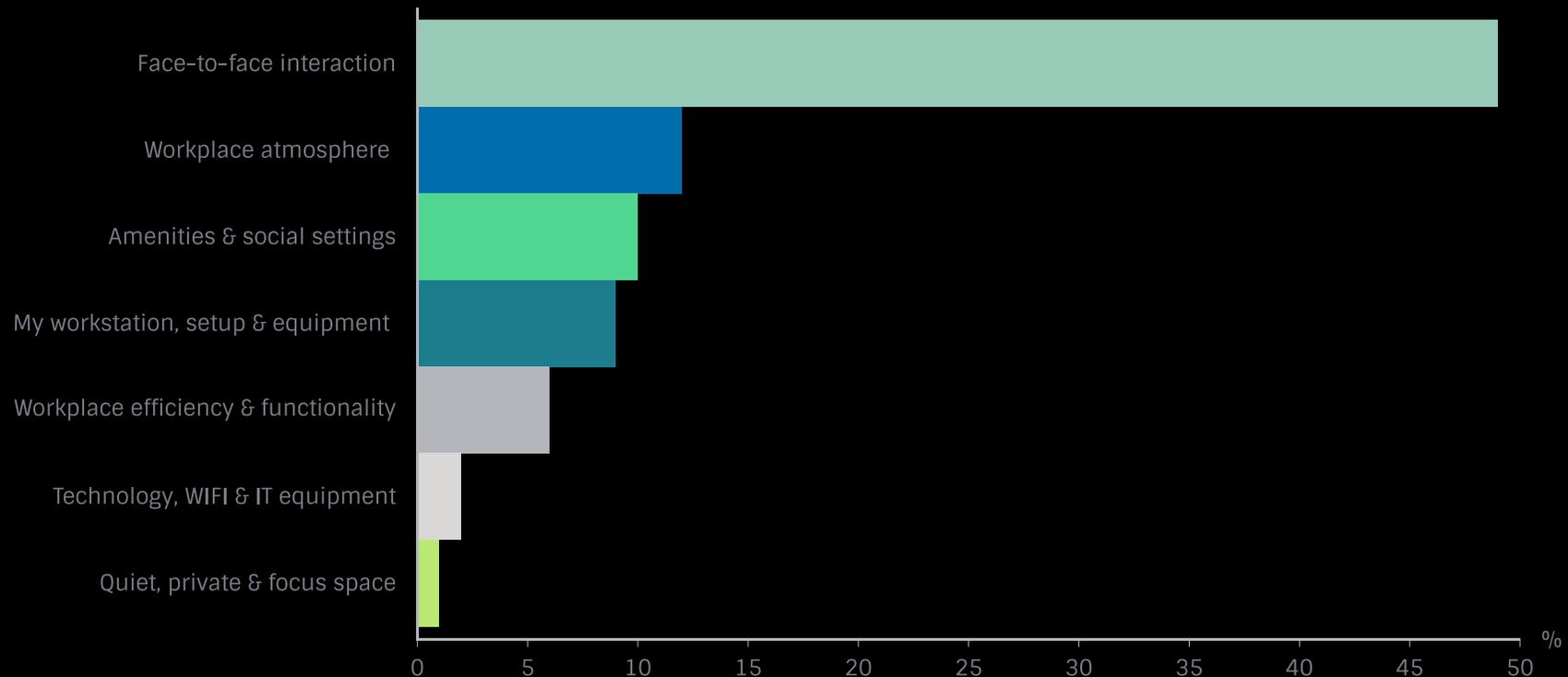
The expectations for flexible work/life conditions were steadily building, but the pandemic has accelerated the process, It's proved that for many individuals and teams, working from home is both doable and desirable.

Previous resistance or reluctance was flattened in the path to responsive productivity. Organisations have been nimble and supportive – seeking to ramp up skills and provisions in order to keep employees engaged and effective. As a result, we are more familiar with remote working, aware of the benefits, challenges, and solutions. Many are now equipped to function within and away from the office.

As individuals return to the workplace, they will bring new collaboration skills and new expectations for the workplace. As they did during COVID-19, organisations need to prepare for evolving scenarios.



Why the workplace still matters



Workplace matters

If employees are positive about their experience remote working, does that mean we don't need an office?

No. The workplace provides things we can't get from our homes.

The answers to this question reflect one of our core assumptions; that people come to

work for access to other people. Focus space is rated at the bottom of the scale, which highlights the successful addition of the home as a setting for focused work.

Will the workplace change?

For many, the change will be in how the workplace is utilised. There is no replacement for being physically

together, especially for knowledge workers who need to constantly share ideas and communicate with others to be effective. So businesses should prepare for the workplace to be more focused on collaborative work, with a reducing demand for permanent focused work settings.

How to manage the return

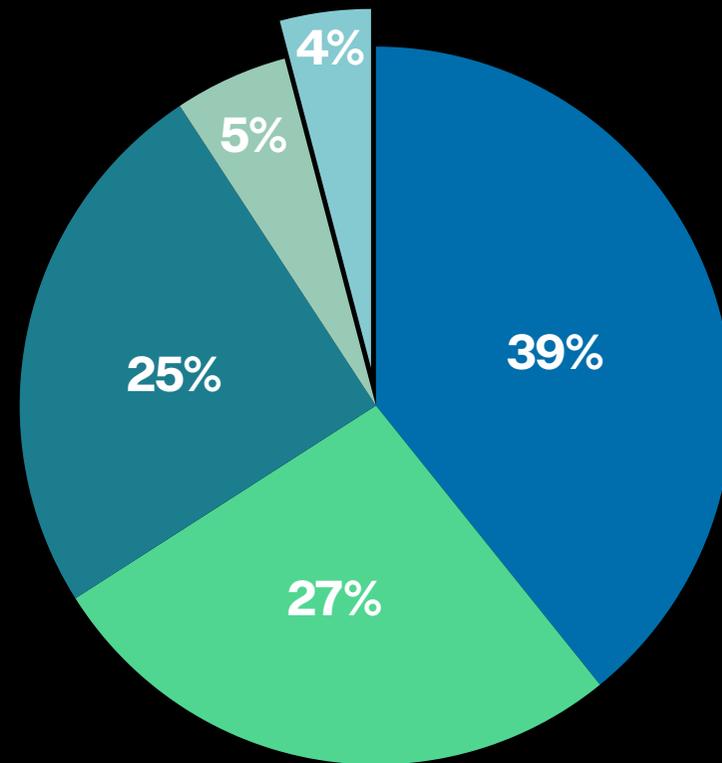


Once cleared by authorities, how will employees return to work? We have been recommending a two-phased approach. The first is a re-entry stage, which brings employees back to work – safely, quickly and without significant expenditure. In the immediate future, most people expect to gradually return in small groups. After business continuity has been achieved and those who cannot work from home are successfully working again, we begin to assess the future purpose of the space within the organisation. Once the future use has been determined, it can invest in long-term solutions.

Everything needs to be clearly communicated to ensure people feel their fears are heard.

Design for people
Designing for physical wellbeing has become part of best practice, and this year and beyond, interventions and solutions for health and hygiene will prevail.

Yet, even in a COVID-secure workplace, we must continue to address mental wellbeing. By creating workplaces in which people feel psychologically safe, businesses are enabling employees to achieve more and be happier at work, while reducing the healthcare costs and high turnover associated with stress and burnout.



We need to know who will be in the office and when to improve integrated work. It's essential that the return improves cross-departmental and non-hierarchical communication.

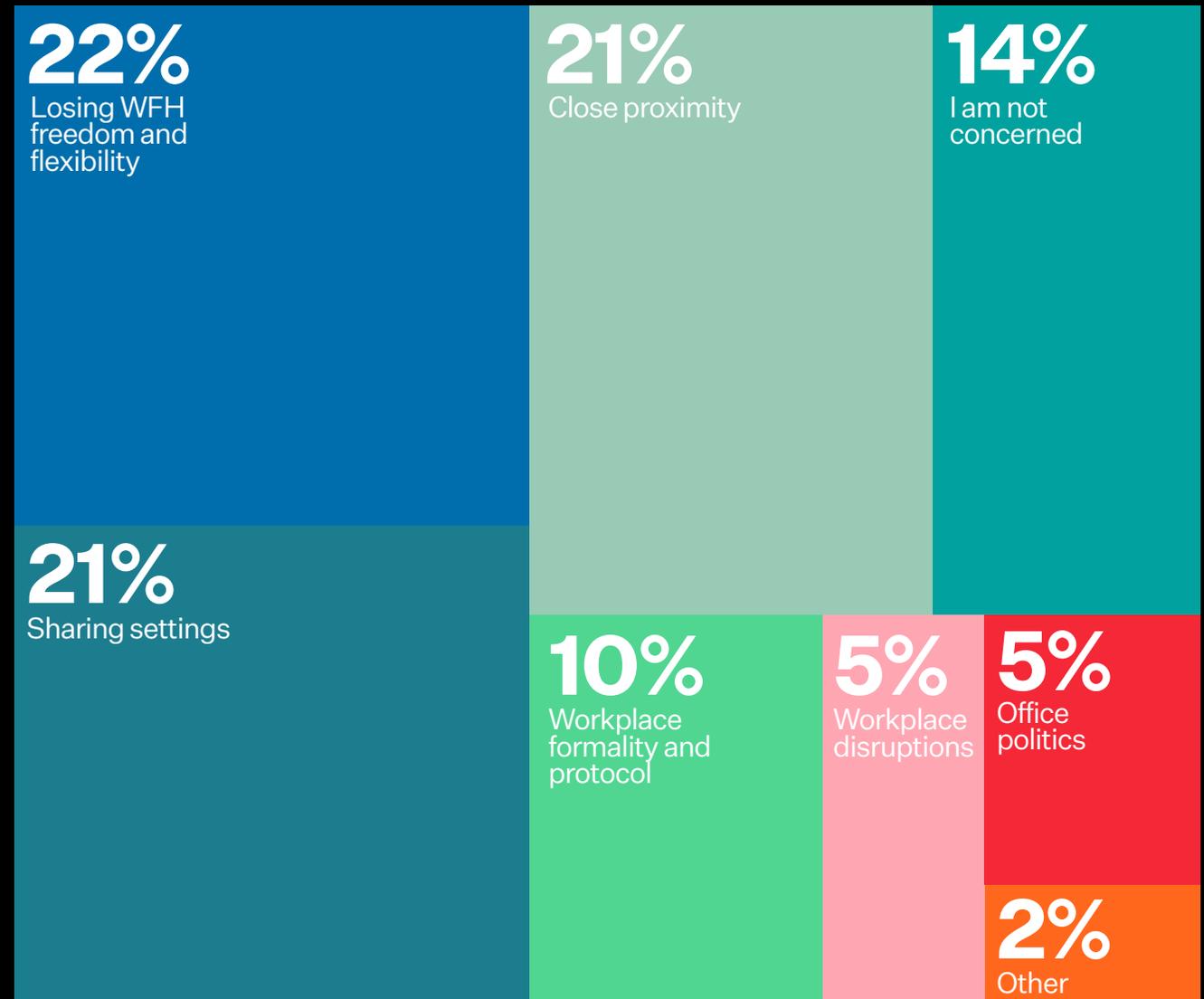
- Team rotations: assigned days
- Phased: essential staff first, others to follow
- Self-selected: staff to choose their return
- Together: when everyone can return
- WFH: permanent remote staff

Overcoming re-entry concerns



Planning a successful return
Immediate return may require environmental adaptations and change management to keep the office functioning effectively. The primary concern is health, with 42% citing concerns about sharing settings or being in close proximity to others. Those that move swiftly and creatively will benefit from increased loyalty, by carefully consulting with employees and embracing their feedback.

Concerns about returning



“I would like to be able to return to the office, once it is safe to do so, with a balance of home and office working.”

Most important workplace values after lockdown



Structures and hierarchies may change; expectations and attitudes will need to be aired and balanced with new leadership goals, pressures and financial incentives.

Nothing will be the same, and there will be a period of adjustment and reintegration during which good communication and authenticity will be crucial. Lockdown has removed some corporate masks and revealed colleagues in their home and family settings. This promotes informality, intimacy and appreciation of circumstances, which may help strengthen peer relationships.



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Let's continue working together to
create workplaces that support people's
performance, health and well-being.



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