overbury

Survey:
What do tenants want?

What landlords need to know to stay ahead of the curve

The past six months has changed the way we view the office. Lots of research suggests most people are intending to return to the office. A British Council of Offices (BCO) survey reports that this trend is likely to be as part of a mixed working style in which homeworking continues to play a role. This is an opportunity for landlords to create office spaces which highlight the value of coming together in the workplace.
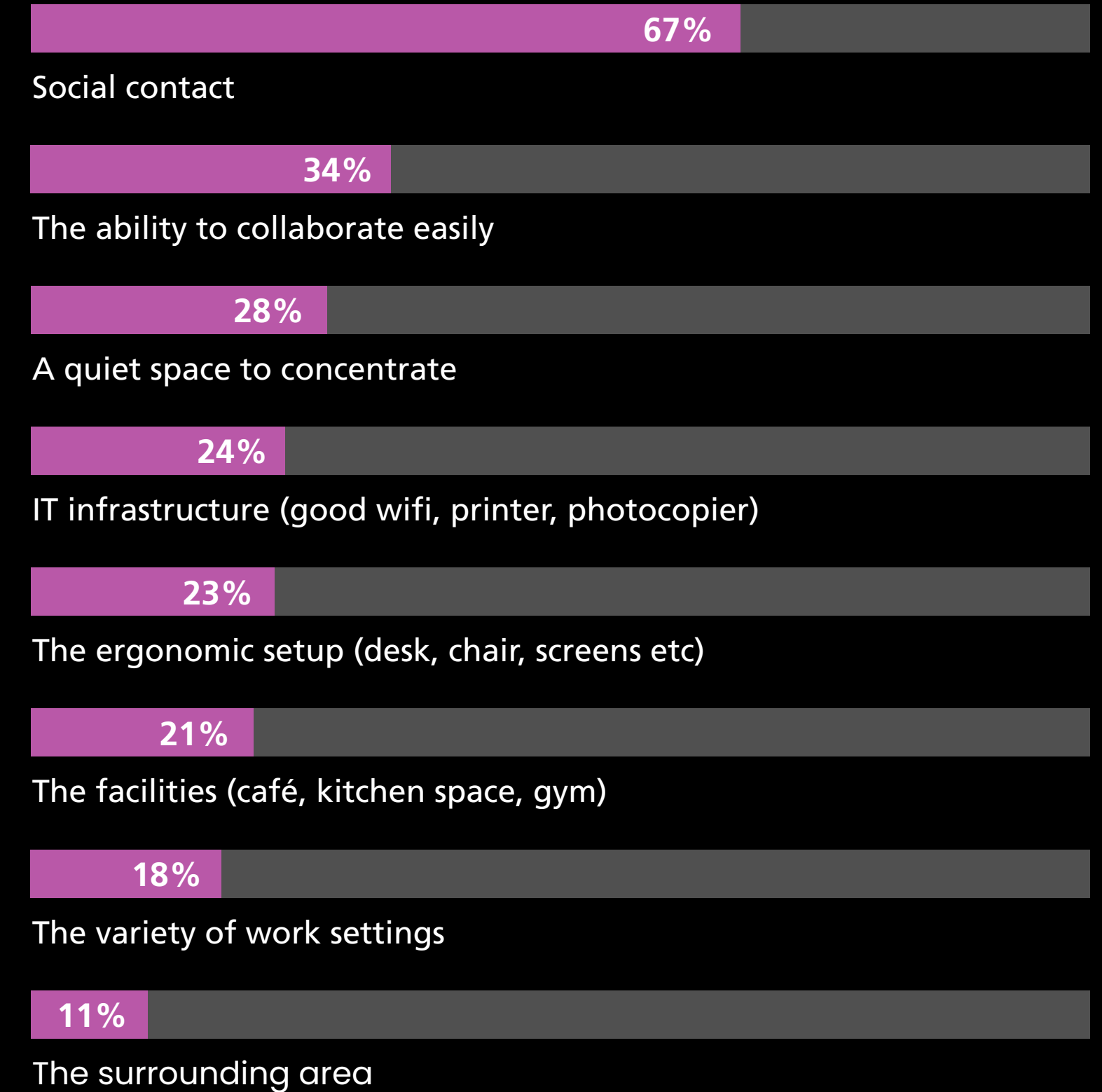
Overbury used OnePulse to look at the elements of the workplace most important in attracting tenants back to the office.

Returning to the office

A poll of 500 office workers in early June found that 67% of people missed face-to-face social contact in the office the most. In a time of social distancing, it may seem an impossible goal but with innovative office design, face-to-face contact can be made a reality. Open, well-designed office spaces will provide the space to socially distance, even while interacting as freely as before.

What do you miss most about the office?

67%
Social contact

34%
The ability to collaborate easily

28%
A quiet space to concentrate

24%
IT infrastructure (good wifi, printer, photocopier)

23%
The ergonomic setup (desk, chair, screens etc)

21%
The facilities (café, kitchen space, gym)

18%
The variety of work settings

11%
The surrounding area

67% of people miss face-to-face social contact in the office.

A BCO survey indicated that workers at the start of their career found that losing their potential to network in the office was detrimental. Overbury's survey also found demographic variations. While both sexes had the same top three reasons for returning to the office, men showed greater demand for collaboration facilitated by the workplace and for quiet areas to focus. In contrast, women missed the ergonomic set-up of the workplace and the variety of settings. Younger workers showed greater demand for quiet workspaces and for workplace facilities like gyms and cafés. It may not be that younger people need quieter places to work in order to focus, but rather that this need is less likely to be met working from home; older people may be more likely to have dedicated home workspaces away from distractions.

It might seem a small detail, but this emphasises that tenants will want to make sure their office space offers something which working from home cannot. Previously the technicalities of homeworking may have seemed too complex to investigate at a large scale for some businesses, but now employers

know it can work there will be less hesitancy to implement it. It might surprise you to know that 69% people we spoke to want to spend more days of their week working in the office than at home. While most workers are looking forward to returning to the office, there are many different factors that draw them. From extroverts and close-knit teams looking for group spaces, to introverts needing quiet to focus, workplace needs to provide space for all.

How often would you like to work from home in the future?

✖ 10%
Never

23%
A few times a month

— 36%
1 – 2 days a week

17%
3 – 4 days a week

✔ 14%
Always
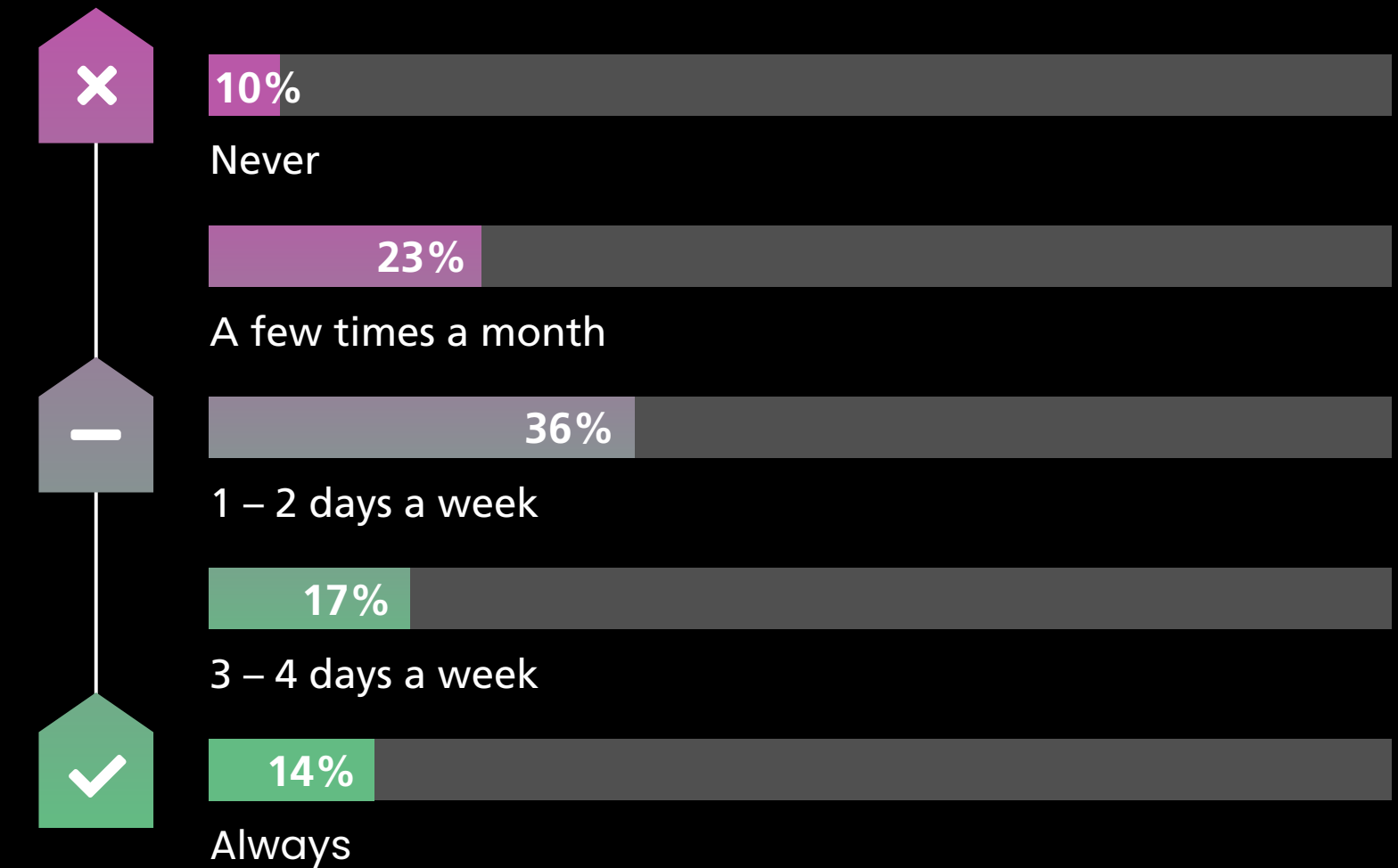
69% of people want to spend more days of the working week in the office than homeworking.

How will the post-COVID workplace look?

Overbury's research considered the role of design in creating the post-COVID office. Views on how the workplace should change were varied. 59% of people wanted the office to remain the same or virtually the same, with a few changes to help reduce the COVID risk. The workplace remains an important draw for workers. How the post-COVID workplace will look should reflect how it's used, consider the employee demographic and balance new hygiene and social distancing measures.

59% of people wanted the office to remain the same or virtually the same, with a few changes to help reduce the COVID risk.

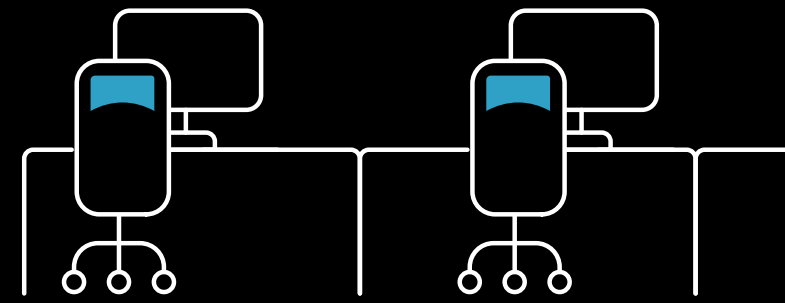# What type of office layout would you be most keen to work at in a post-COVID world?
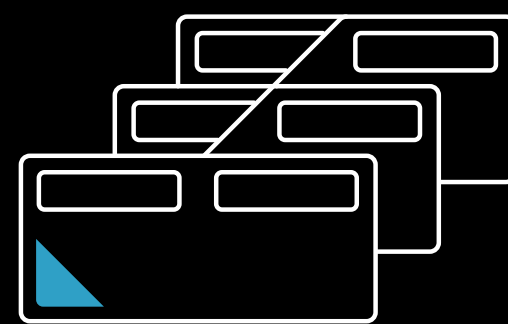
1st

A dedicated desk that only you use
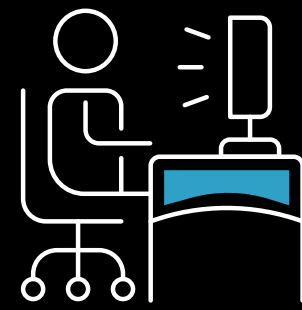
2nd

Traditional banks of desks separated to maintain 1-2 m distance

3rd

Cubicle-style offices to protect desk space with higher screens
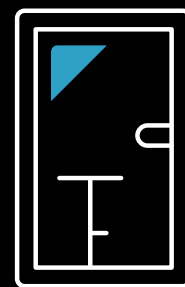

4th
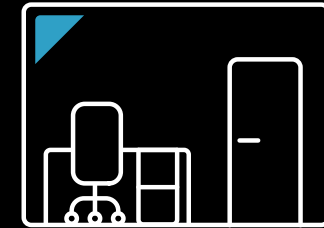
Hot-desking with an enhanced cleaning regime

5th

Informal booths or pods which are partially enclosed
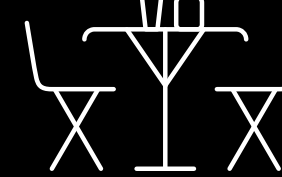

6th

Private, cellular offices with full walls and door which closes

7th

Tables in café style areas in a large, open space

The research also revealed what would make employees feel most comfortable when returning to the office. When asked what form of workplace would be preferred, the most popular response was a dedicated personal workspace. For the oldest (55+) and youngest (18-20 years old) respondents, traditional banks of desks separated by a 1-2 meter distance was more popular, with dedicated personal desks featuring second. Workspaces at either end of the privacy spectrum: private offices and tables in café style areas scored the lowest for all age groups. The way we think about space has changed, at least in the short to medium term. This doesn't have to disrupt the office, though. For landlords, this will mean making the most of their space in creative ways. Spaces may need to be less dense and some might think about using one-way systems or adding hygiene stations.
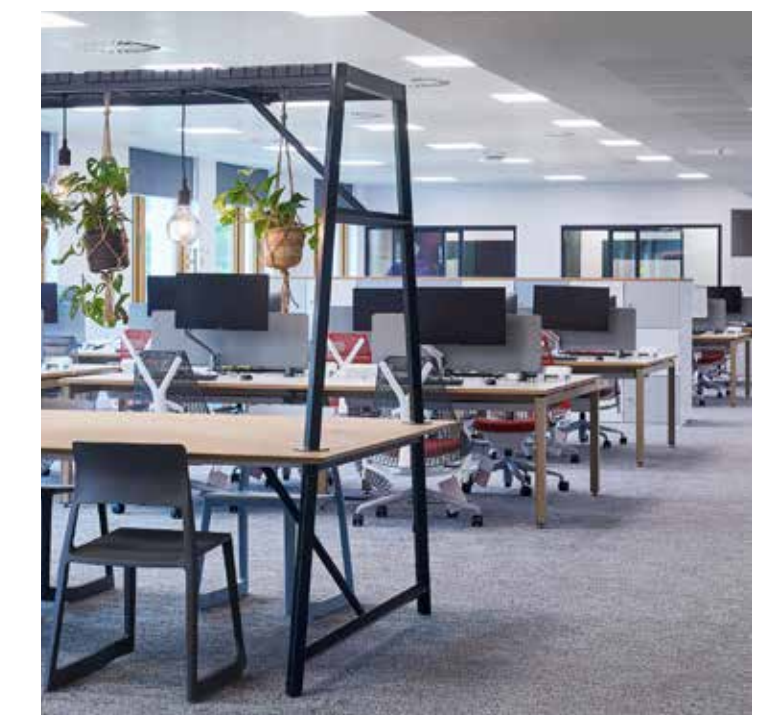
The survey revealed a definite preference towards 'owned' spaces and furniture. However, in the poll asking what people missed most from the office, collaboration and quiet working seemed to be a draw for some people. It will be important to incorporate areas that allow for these different types of work which feel safe. Hot-desking with an enhanced cleaning regime was the most popular option after dedicated workplaces, suggesting that shared areas would be utilised by some so long as care was taken to minimise any possible spread of COVID-19.

Facilities such as cafés were deemed to be the least popular as workspaces and didn't rank highly in what employees missed about their office. In the short term, it may be that these areas will see less use. Providing individualised space maintained to an exceptional level of hygiene is favoured when people transition back to the office.

When it comes to furniture in the office; what would you like to see as part of the post-Covid office that will best enable your work and make you feel safe? By popularity:
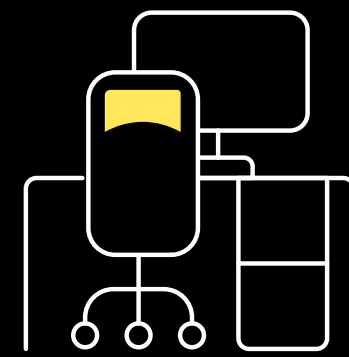
1st
Furniture which can be easily moved or configured to allow people to distance themselves
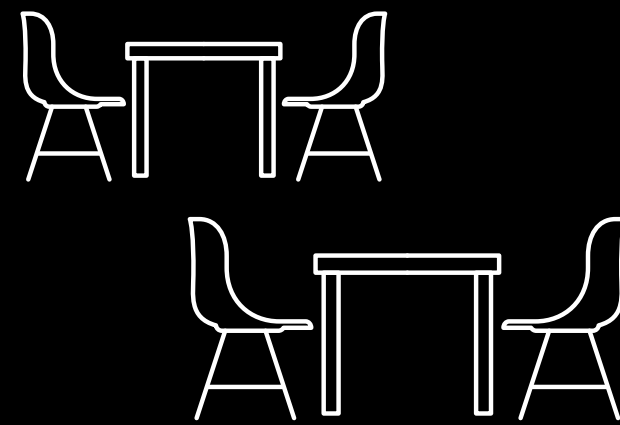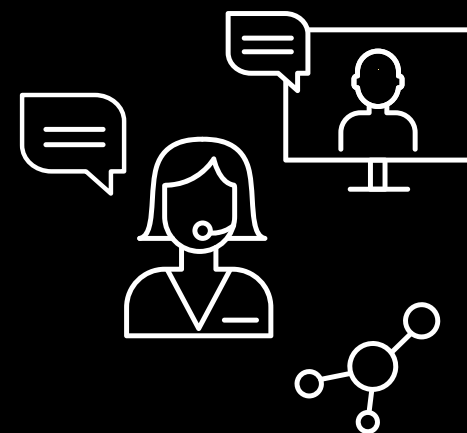
2nd
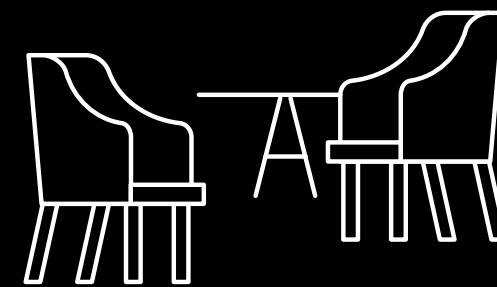Increased use of hard, cleanable surfaces and less soft seating

3rd
Video conferencing technology more widely available to reduce need to travel

4th
Soft seating that can be safely and frequently cleaned

5th
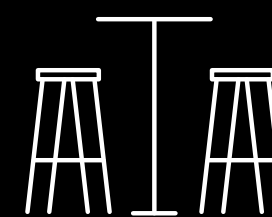Furniture with hands free commands – such as voice-activated sit/stand desks

6th
Height-adjustable desks to maintain social distance

7th
Tall tables in a meeting room to facilitate standing meetings

The impact of furniture on office design

Taking a deeper dive to understand how respondent could be made to feel safer in these spaces. When asked how they would like to see furniture used in the post-COVID office, over half wanted furniture which could be easily moved or configured to allow people to socially distance (54%) and an increase in the use of hard, cleanable surfaces and less soft seating (52%). While casual lounge areas with sofa and armchair-style seating may not be popular, the poll shows that agile and shared areas should not disappear altogether. Flexible workspaces can be used to cater to the needs of the workplace and adapt as the situation continues to change.

Increasing the availability of video conferencing software was also popular with respondents. With technology having played a central role in enabling work to continue and reducing the need to travel throughout the pandemic, it looks to be a more common fixture of the workplace than ever.

Of the options available, simple solutions such as easily movable furniture and hard surfaces were consistently more popular. The more complex and high-tech solutions can be appealing, but it is the simpler workplace design ideas that will allow offices to continue to adapt and evolve with the situation.

The role of technology

Technology has undoubtedly shaped working lives over the past months. It will continue to play a greater role in the workplace than before and incorporating it will define in part how space is used. Overbury's final survey with OnePulse asked what technology should feature in the workplace to get the best from its tenants.

IT infrastructure is a draw for around one quarter (24%) of people to return to the office. It's important to understand how technology is currently seen in the workplace and how that can be improved. An astounding 63% of people said that their workplace technology was average at best. Over one fifth considered their workplace technology mediocre or poor. This is one of the strongest indicators of what landlords need to consider in the workplace infrastructure. Whether it's to support remote working or help those in the office be more productive and collaborate.

IT infrastructure is a draw for around one quarter (24%) of people to return to the office.

What technology do you currently have in your office which supports you to work productively?

53%
Digital communication tools like video conferencing, messaging apps, portals and secure file sharing software

39%
Smart devices or web-based apps that enable you to work anywhere, anytime

25%
The option to bring your own devices from home to use at work

20%
Smart furniture like sit-stand desks and ergonomically adjustable chairs

17%
Office collaboration tools like digital whiteboards and touch-screen technology

16%
Tech and video-enhanced spaces, from board rooms to quiet pods, that allow you to meet with people across multiple locations

8%
Individual control of the temperature and light levels around you

11%
Other

Older people tend to be happier with their workplace technology than their younger counterparts. This might be due to differences in what employees are accustomed to while working from home. Men tended to show greater satisfaction with their workplace technology, with 43 percent deeming it good or excellent, compared to only 32 percent of women.

63% percent of people considered their technology average at best.
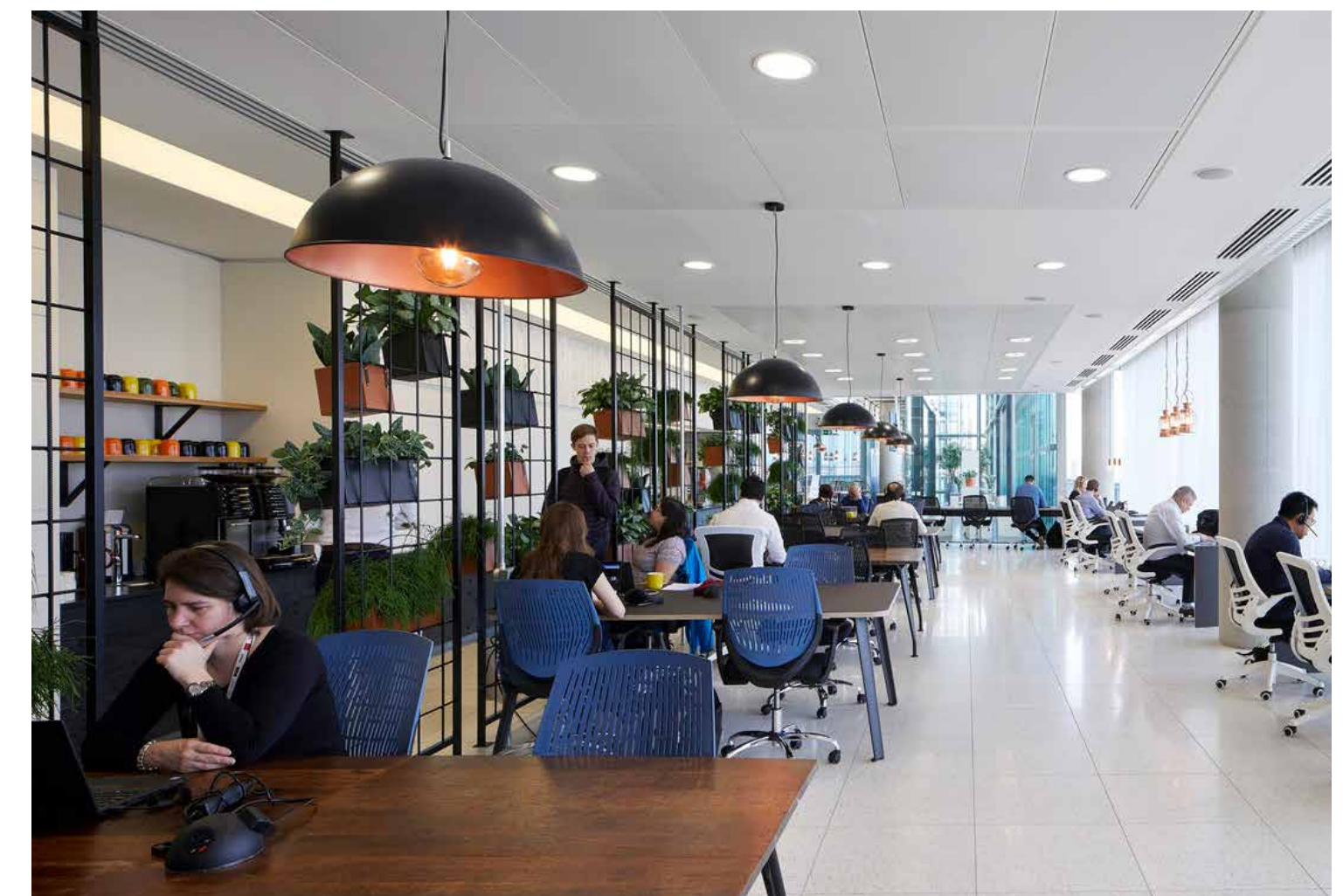
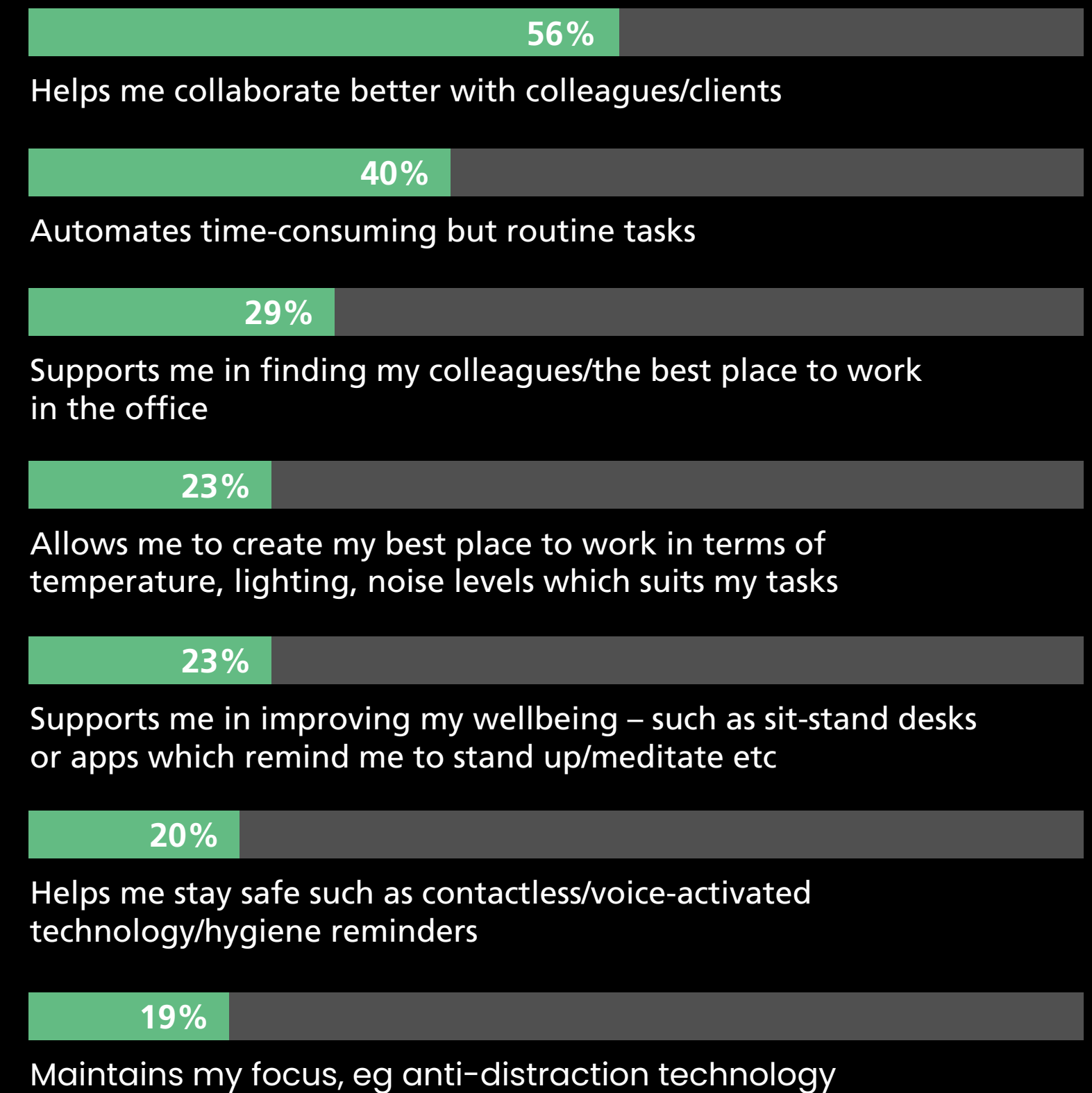The most commonly offered and used technologies are digital communication tools such as video conferencing, messaging apps, portals, and secure file sharing software. These were provided by just over half (53%) of workplaces. With tenants working from home on a more regular basis, virtually all office spaces will benefit from these technologies. Offices which don't have quiet spaces where people are able to have private video calls, for example, will need to provide them

Smart devices or web-based apps that enable employees to work anywhere or at any time were cited as the second most commonly used technology (39%). The option to bring personal devices from home was available in 25% of workplaces. Less common were features such as sit-stand furniture (20%), office collaboration tools (17%), tech and video-enhanced spaces (16%), and individual control of temperature and light (8 %). Although there was some variation among ages and genders, they followed the same broad patterns.

Why these technologies are being used will guide their evolution. When workers were asked the main benefits of workplace technology, the majority (55%) cited collaboration with colleagues and clients. Also significant was the ability to automate routine and time-consuming tasks. 29% said that technology was useful in supporting workers in finding their colleagues or finding the best place in the office to work. This suggests that many respondents value being able to vary their place of work within the office but like to do it efficiently. Time spent searching for a free meeting room can be frustrating and this may become even more of an issue as spaces need to be cleaned between use. Clear digital signage which lets workers know what spaces are clean and empty might be useful.

Similar numbers of workers reported that the office allowed them to feel safe and comfortable, be this through environmental factors (23%), physical wellbeing (23%), hygiene practices (20%) and anti-distraction technology (19%).

What do you consider to be the main benefits of workplace technology?

56%
Helps me collaborate better with colleagues/clients

40%
Automates time-consuming but routine tasks

29%
Supports me in finding my colleagues/the best place to work in the office

23%
Allows me to create my best place to work in terms of temperature, lighting, noise levels which suits my tasks

23%
Supports me in improving my wellbeing – such as sit-stand desks or apps which remind me to stand up/meditate etc

20%
Helps me stay safe such as contactless/voice-activated technology/hygiene reminders

19%
Maintains my focus, eg anti-distraction technology

Where does this place landlords?

This disruption to the office in 2020 is a trigger for its evolution. The office is certain to change. Data-driven analysis can pinpoint what draws people to return when homeworking is a viable alternative. It's possible to craft office spaces which are adaptable and resilient, and which cater to the diverse needs of the workforce. Pre-empting the challenges that a full return to the office might pose, landlords can stay ahead of the curve. Creating easily cleaned spaces, with room to distance will reassure workers that they are in safe hands. If we see a 'blended' workplace solution - where home and remote working play a role - landlords can provide spaces which help their tenants adapt to these changes.

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