

OBi

THE FUTURE WORKPLACE
SURVEY RESULTS

JUNE 2020

The workplace was evolving at pace even pre COVID-19 and over the past few months we have seen the business world accelerate the implementation of new ways of working which were already gaining momentum. Already businesses are working smarter, more efficiently and have adapted to the new blended way of working.

To better understand how executives are thinking about the changes that may occur in the workplace, we created a questionnaire exploring 'the future of the workplace' which was distributed to an extensive occupier client base with workplaces in the Manchester region. We intentionally wanted to avoid the immediate "back to work view" on the workplace and our survey therefore focused on executives views on their longer term vision.

The overall aim of this research is to gain a better understanding of the current market and try to visualise what the future of the workplace will look like in the medium to long term.

The research objectives were to analyse views and trends from employers from a variety of different sectors.

The questionnaire identified numerous insights into the future of the workplace giving us vital information on both how the workplace will be utilised going forward, and how businesses intend to operate going forward in the medium to long term.

› KEY FINDINGS:

01



The importance that collaboration and human interaction has within the community of the workplace

02



The desire organisations have for a flexible working approach, working both in the office and remotely

03



The importance of the workplace for mental wellbeing

04

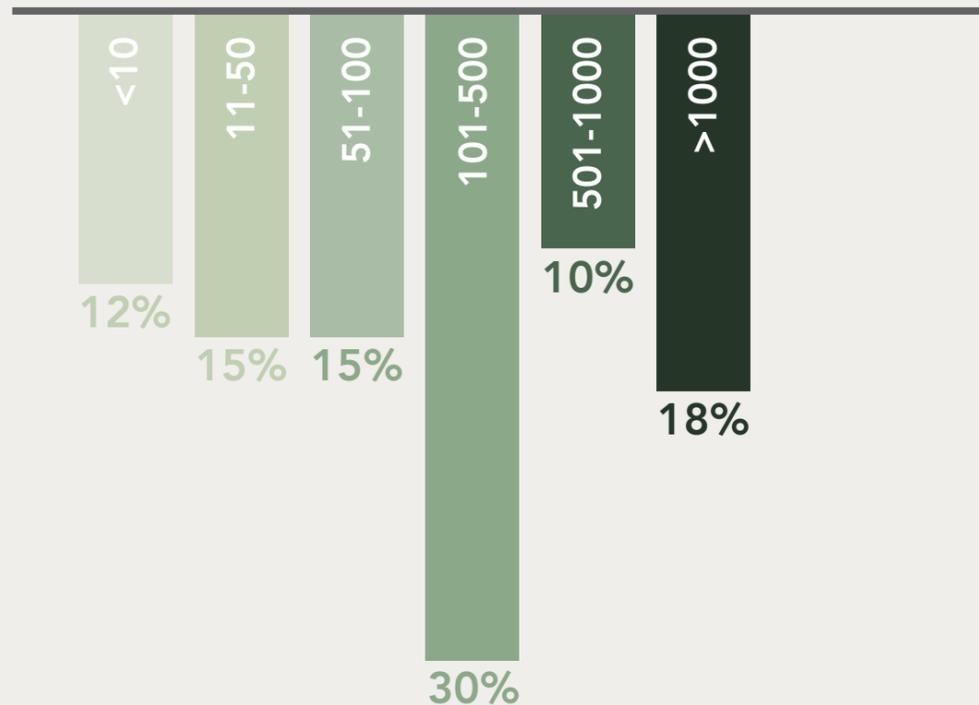


The desire for more amenity areas within the workplace and lower desk densities

WHO DID WE ASK?



› How many full-time employees does your company have?



› 33% of businesses who participated in the questionnaire have conducted an internal survey to explore employee's ideal workplace. The three most common findings from these survey results were:



Hygiene - almost every response stated that their employees wish to have a clean and safe working environment with enough space to social distance.



Flexibility - a blend of working from home and the office with flexible working hours.



Green and creative office environment - it seems biophilia design is here to stay to create a relaxed and healthy environment, along with a range of social spaces for employees to collaborate.

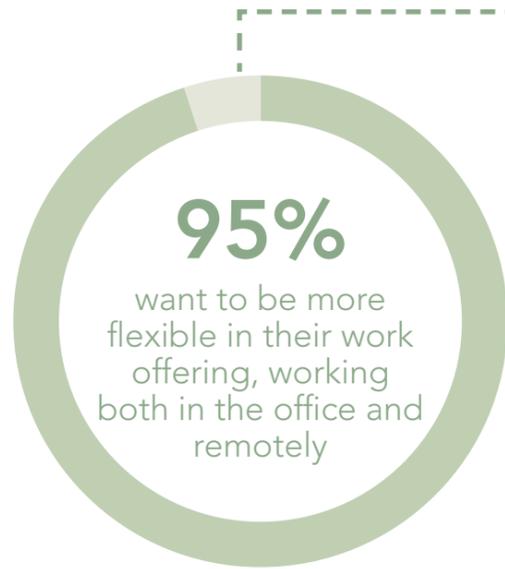
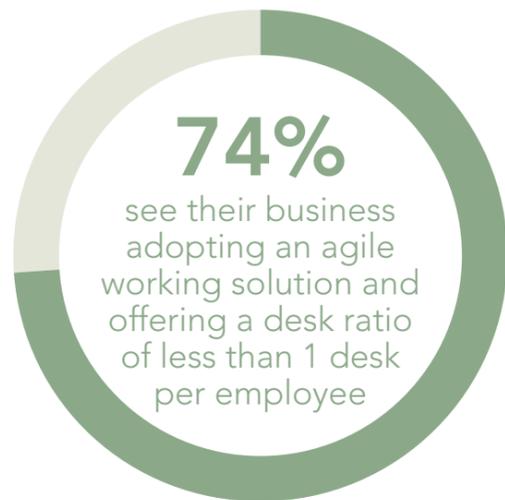
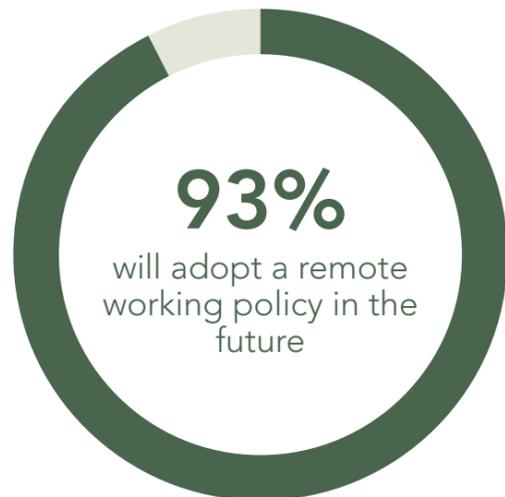


100%

of businesses are confident their workplace is based in the right location and are not considering moving elsewhere at this current time

15%

is the average percentage of teams within businesses that worked remotely prior to COVID-19



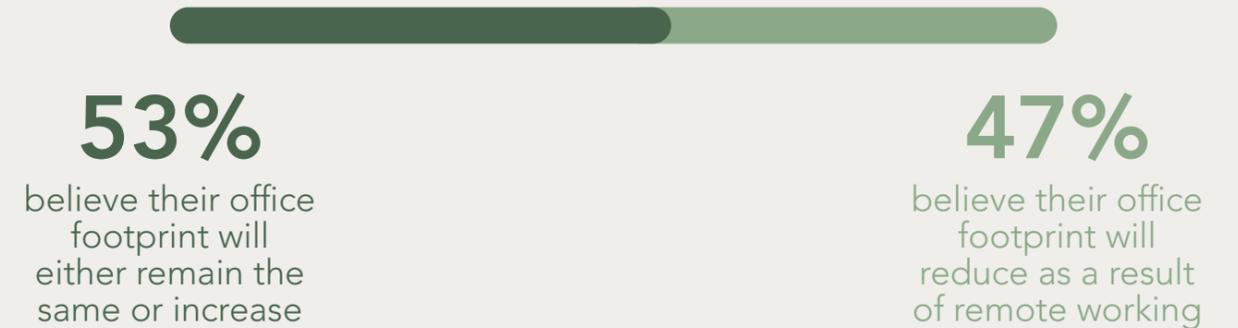
Only 5% want to work remotely full-time, with **no** businesses desiring to work in the office full-time

› Will your current workplace design need to adapt to suit your longer-term needs?



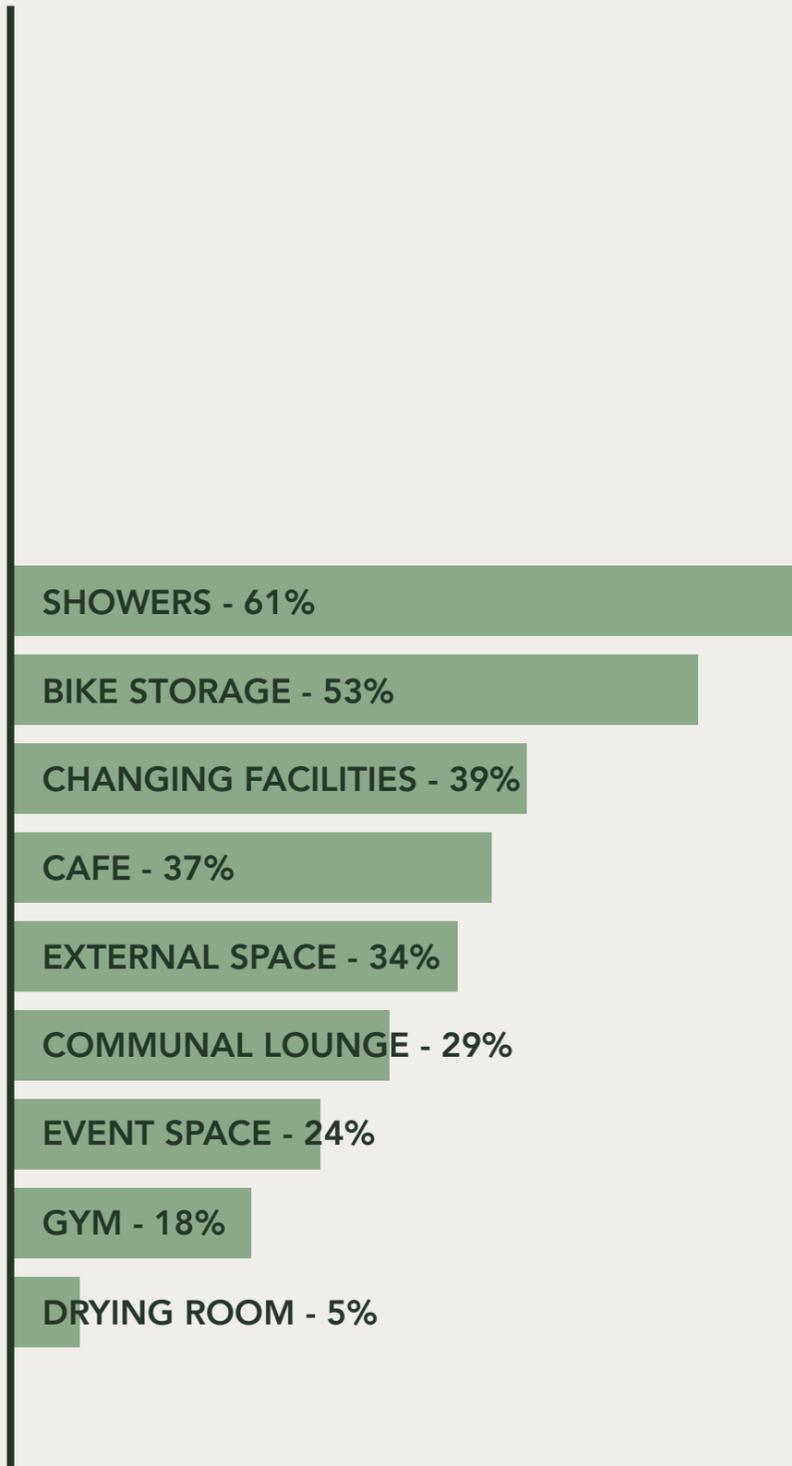
- “Change in layout, hot desking, homeworking”
- “More flexible work spaces and improved social areas”
- “Less fixed workstations”
- “Expanded video conferencing facilities”
- “More interactive spaces”

› Do you see your office footprint (per sqft) change in the future?



What three communal/ common workplace facilities provided by a landlord do you value the most?

Showers, bike storage, and changing facilities are the most valued communal facilities within the workplace with cafes, external spaces, and communal spaces following shortly behind



› Top 3 positive factors from home working that businesses would like to see incorporated into the workplace:

- 1 SOFTER, MORE INFORMAL ENVIRONMENT
- 2 FLEXIBILITY TO WORK AROUND LIFESTYLE
- 3 QUIET / FOCUSED WORK SETTINGS

100%

of businesses stated social interaction and collaboration were the main elements they missed the most about the workplace



What aspects of wellbeing are most important to your business and how would these be implemented in your workplace?



Team engagement with regular interaction with colleagues



Ensuring teams value work/life balance



Encouraging a healthy lifestyle both physically and mentally



Incorporating 'downtime' areas into the workplace for reflection and work-free conversation

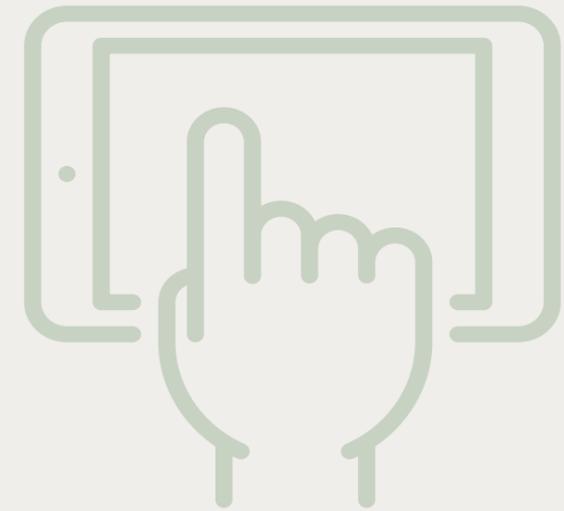


Offering a variety of different spaces for employees to work, ensuring stress is at a minimum



Improving facilities to encourage movement and exercise, e.g. fitness facilities, shower and changing rooms, bike storage

What changes will you implement within your business to enhance productivity through the use of technology?



› Enhanced video conference facilities

› Improved IT infrastructure to cope with demands for remote and office working

› Incorporation of SMART technology in the workplace

› Encouragement of using virtual collaboration platforms such as Microsoft Teams & Zoom for meetings

› Improved VPN structure & mobile technology

Many have formed immediate kneejerk re-actions to the past few months and there is a real danger that those making decisions too quickly could face longer term problems in their businesses. Our survey has proven that this pandemic has accelerated workplace trends already in motion and that the workplace is certainly not dead. We were surprised by the level of consistency across businesses of different sizes and sectors based in the Manchester region.

The survey identified some key trends that can help us to create a clearer vision of what the future of the workplace could look like.

Culture is a perennial top concern of executives and the growing interest in employee wellbeing. Employers have seen the ramifications of a poorly designed workplace along with the effects of working from home full time. Flexible working practices will become the norm where feasible with a hybrid strategy of working from home at least two days a week.

Technology has been critical in the global response to the COVID-19 crisis, and in a post-pandemic world, we will depend on technology more than ever. We will be presented with new vulnerabilities as we start to rely on technology and Cyber Security will be a matter of increased importance.

At its core, work in future will be more networked, more devolved, more mobile and more fluid.

› THE FUTURE WORKPLACE

01



Increased focus on health and wellbeing

02



Increased demand for flexibility

03



Improved collaboration spaces

04



Technological innovations

PRODUCED BY

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YOU