Productivity, the workplace and Covid-19

RICS®

AVISON YOUNG

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The productivity conundrum

Who are the most productive workers? And what brings the best out of them? What role does the workplace play? Can we measure productivity at all in the knowledge-based service sector?

The answers are far from straightforward. This perhaps explains why the sustained decline in productivity growth at company and national levels[1,2] over recent years has been the subject of such scrutiny.

The challenge is that in the service sector, productivity is not based solely on delivering the most outputs, neither is it based on producing the best outputs – but rather an often intangible combination of the two. That makes measurement challenging, if not impossible.

Yet delivering improved productivity is the key to economic growth and enhanced standards of living. It therefore underpins the ambitions of governments and corporate chief executives across the globe.

The difficulty in measuring service sector productivity is not a trivial one - Peter Drucker (allegedly) said, "you can't manage what you can't measure". Whilst overall business success generally has a relatively clear set of parameters, most services companies (outside of retail and logistics) rely on proxy measures of output such as fee income or profitability; even these metrics can be very difficult to evaluate at individual level.

This perhaps gets to the heart of the productivity issue in the service sector. In the world of manufacturing, driving improvement in productivity involves building better machines and linking them together into more efficient systems. The impact of any changes can be measured via changes in output. In the contemporary service sector, improvement in productivity depends on the performance of people, with an increasing focus on technology to improve capacity and create better systems. This is as much an art as it is a science. The key to driving productivity in the knowledge economy is understanding what makes people[3] happy and ambitious to perform at their best: a subject that was studied intensively by Abraham Maslow in the 1940s. This will be the lens through which we view productivity in this research.

A vast body of research has been produced in an attempt to find ways to more accurately measure productivity – all of which is inconclusive at best. We choose not to dwell on this subject, which is a task for less tumultuous times. We are happy to take as our starting point the conclusion – as picked up in Appendix 1 – that the most reliable, cost-effective and useful metrics of productivity are employee perceptions of their own productivity. When the right questions are asked and interpreted correctly, staff will tell you how productive they feel – and they are usually pretty accurate in their assessment. Every individual will have some understanding of how effective and how productive they are on any given day. This form of self-assessment has become highly refined through the work of specialists such as Leesman, whose data underpins much of the analysis in this report.

This whole issue has been thrust into the limelight as knowledge workers across the world have been unceremoniously extracted from their usual workplaces and relocated to a completely new working environment. The globally synchronised experiment in homeworking has led to much speculation about the future of work and the workplace – with opinions on the drivers[4, 5, 6] of productivity at the heart of the debate.

This report examines how Covid-19 has shed light on the respective contributions of corporate management, technology and especially the workplace on knowledge worker productivity, as work has shifted from the office to the kitchen tables and spare bedrooms of our homes.

Maslow's hierarchy of needs – redefined

We believe that employees who are happy and fulfilled will be more productive than those who are not.

To provide a framework for thinking about what influences employee productivity, we therefore begin by re-examining a well-known body of research into psychological health, created by one of the most influential psychologists of the twentieth century.

Abraham Maslow's hierarchy of needs is often portrayed in the shape of a pyramid with the largest, most fundamental human needs at the bottom and the need for self-actualisation at the top. The theory is that individuals' most basic needs must be met before they become motivated – or have the time and capacity - to aspire to higher levels[7]. Adapting this to a workplace setting allows us to pinpoint specific areas which may favourably or adversely affect a worker's psychological health – and thus, we believe, their productivity.

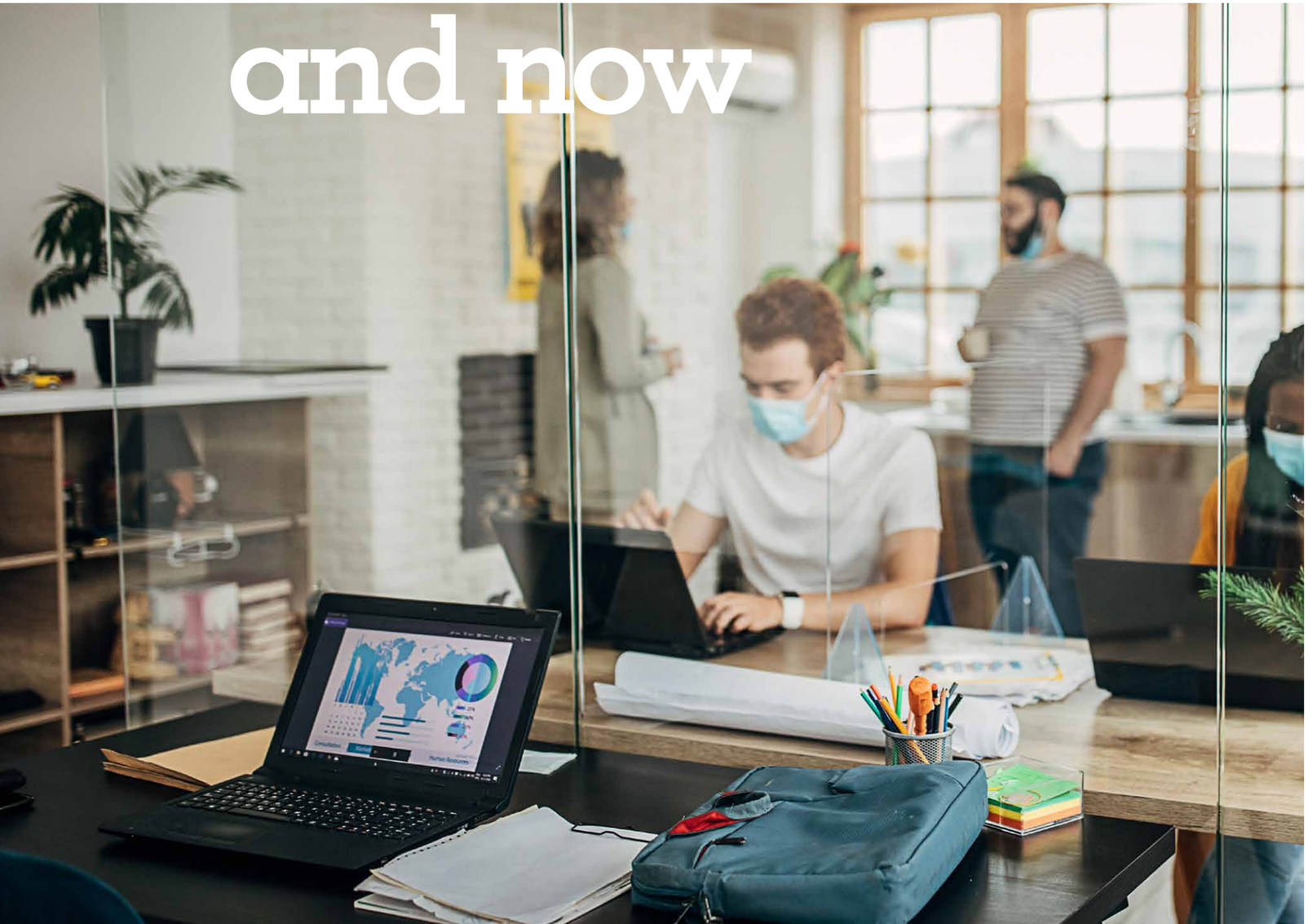
Maslow recognised that we have a variety of "needs". These range from functional necessity to spiritual and emotional wellbeing, all of which influence our sense of wellbeing and thus our behaviour – including at work. We believe that high quality workplaces that optimally meet individual and collective working needs will contribute to creating a happier, healthier and more productive organisation. Equally, inefficient or ineffective spaces and working practices will clearly hinder progress towards overall success and the creation of a productive organisation.

It is therefore important to critically examine the role that workplace plays in supporting employee satisfaction and productivity; but this needs to be done in the context of the employee's overall working experience. Whilst we are primarily interested in the workspace aspects of this equation, it is clear that the impact of the physical environment is integrally linked to the management environment within which people work. A third crucial factor is the way in which they work and interact with colleagues - which in contemporary organisations is crucially dependent on technology platforms that facilitate communication and access to corporate information networks.

It is easy to identify the impact of the workplace at lower levels of the hierarchy – providing shelter from the weather and a safe environment in which to work. But we believe that the workplace also plays an important role in supporting and promoting activities and behaviours that are required to satisfy higher order needs. In the following pages we therefore break down each tier of needs to understand how they contribute to creating an environment in which we are motivated, able and supported to be productive.

MASLOW'S ORIGINAL HIERARCHY OF NEEDS

The here and now



Either explicitly or implicitly, leading organisations have long recognised the interdependence of the three dimensions that we have identified: workplace, management and technology. To varying degrees they have been incorporating this thinking into their workplace strategies to ensure employees are healthier, happier and more productive.

However, 2020 has seen a total rethink of our approach to almost every aspect of work and the workplace, as the Covid-19 pandemic triggered an unprecedented global experiment in flexible working.

The majority of office workers in major cities around the world have been forced to work from home for an extended period.[8] At the time of writing, the total impacts and duration of the crisis remain unclear. At some point it is likely that the impact of the disease will subside, through policy, natural conditions or the development of a vaccine that may allow a return to more 'normal' behaviour – although this is unfortunately far from certain. There remains the very real possibility that we could see renewed outbreaks of infection leading to dependence on the widespread use of PPE, an increase in the use of track, trace and test systems and enduring changes and restrictions to all aspects of our lives, including the way we use space and interact with each other.

Whatever the outcome, the experience of Covid-19 and the global response to it has created a rupture in what we considered normal. It has taught us many things about ourselves: what is important to us, how we would like to live and how we want to prioritise our time. Whilst some current experiences will fade in the memory, other learnings will continue to influence where and how we work long into the future. Those which will endure are the ones where we have learned to do something better than we were doing before.

Intriguingly, many of us have learned not only to accept remote working but to positively embrace it. Indeed, many people report an increase in their perceived productivity during lockdown. In a study of 1,000 employees at UK SMEs, Onecom found that 28% felt their productivity had increased since working from home due to lockdown while 28% felt it had stayed the same.[9,10] On the one hand, there are simple explanations for this: time saved in commuting,[11] an environment free of distraction by colleagues and a reduction in tedious meetings as Zoom-fatigue leads people to restrict anything but essential interaction. But is it really the case that centuries of business evolution – and vast amounts of investment in expensive office space – has been revealed as a complete waste of time and money in a few short months?

Using the framework described above, derived from Maslow's work, we therefore look in more detail at the hierarchy of needs of a modern office worker. We examine the extent to which each of these needs appears to have been met in a homeworking environment, compared with how well employees felt they were supported when doing the same job in the office. If employees really can work equally or even more productively from home, the key question is "why"? The answers will help us understand which of our enforced changes in behaviour will endure beyond the end of the current crisis – and what implications this may have for the role and design of the workplace of the future.

The Covid-enforced homeworking that has been so widespread during 2020 provides a unique opportunity to evaluate the way in which our working environment influences how we work and the impact that has on our productivity. We do this using data from a variety of sources, including three major surveys: two conducted by Avison Young, the other by the world's leading independent assessor of employee workplace experience and workplace strategy company. Further details of each of these surveys are provided in Appendix 2.

We begin by examining the way in which our most basic workplace needs are met in the office and at home, before progressing "up" our Maslovian hierarchy in the search for ultimate job satisfaction and corporate success.

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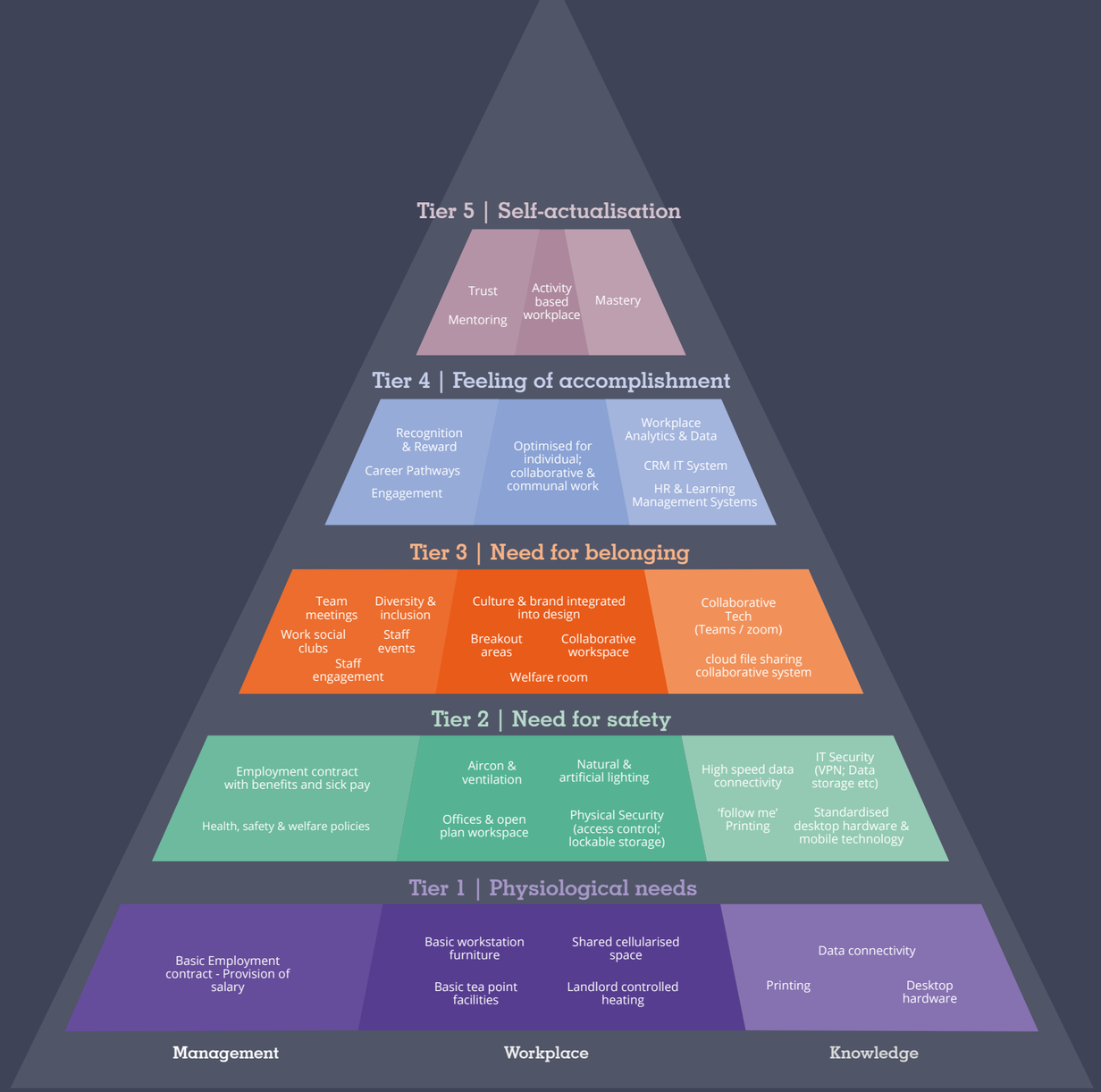


Tier 1

Our most basic needs

Having a place to work, a regular monthly salary, comfortable working environment and essential and basic facilities

MANAGEMENT

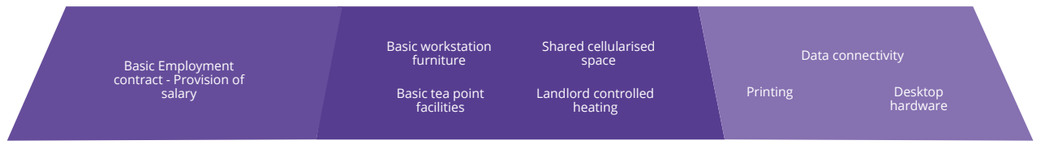
Provision of basic contract and salary (statutory requirements)

WORKPLACE

The provision of a space that allows for work to be carried out

KNOWLEDGE

Access to computers; internet and printing

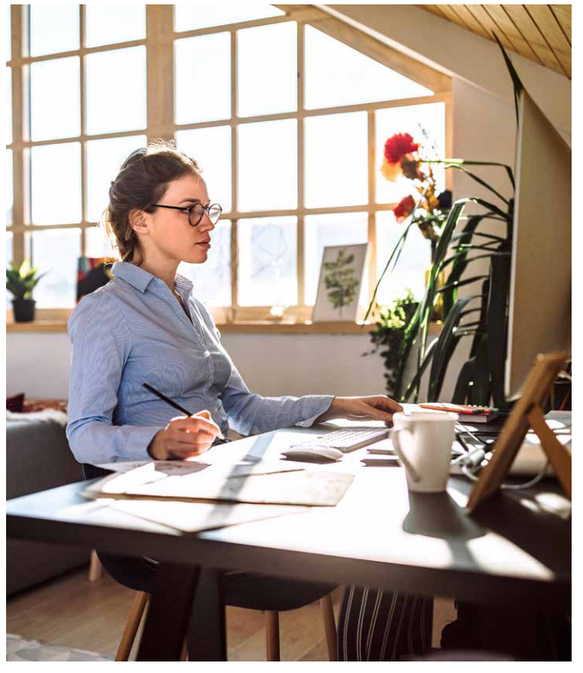


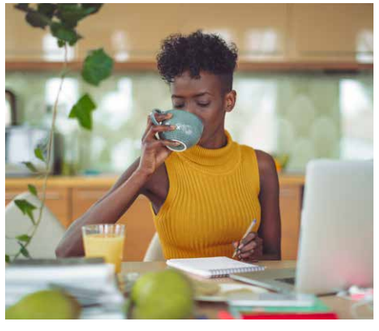
At the base of the original version of Maslow's hierarchy of needs we find the physiological level, which encompasses the basic yet self-preserving needs, such as sleep, water, and shelter. Adapted to a workplace environment, this tier covers the basic elements on which all other tiers need to rest. They form the bones of a functioning workplace.

Equipped with these basics, most of us can at least "make do" and get some work done. Which of us has not spent time working in planes and trains, in cafés and hotels – or even a parked car? For some, this was already their dominant work experience - a kitchen table or home study might seem luxurious in comparison.

At their most basic, the key requirements are:

- a roof over your head, a chair and a desk on which to work;
- an internet connection;
- adequate IT hardware and software – essentially a computer and a mobile telephone giving access to colleagues, clients and corporate networks and information systems.
- an arrangement with your employer that frames the work you will do and the way you will be paid.



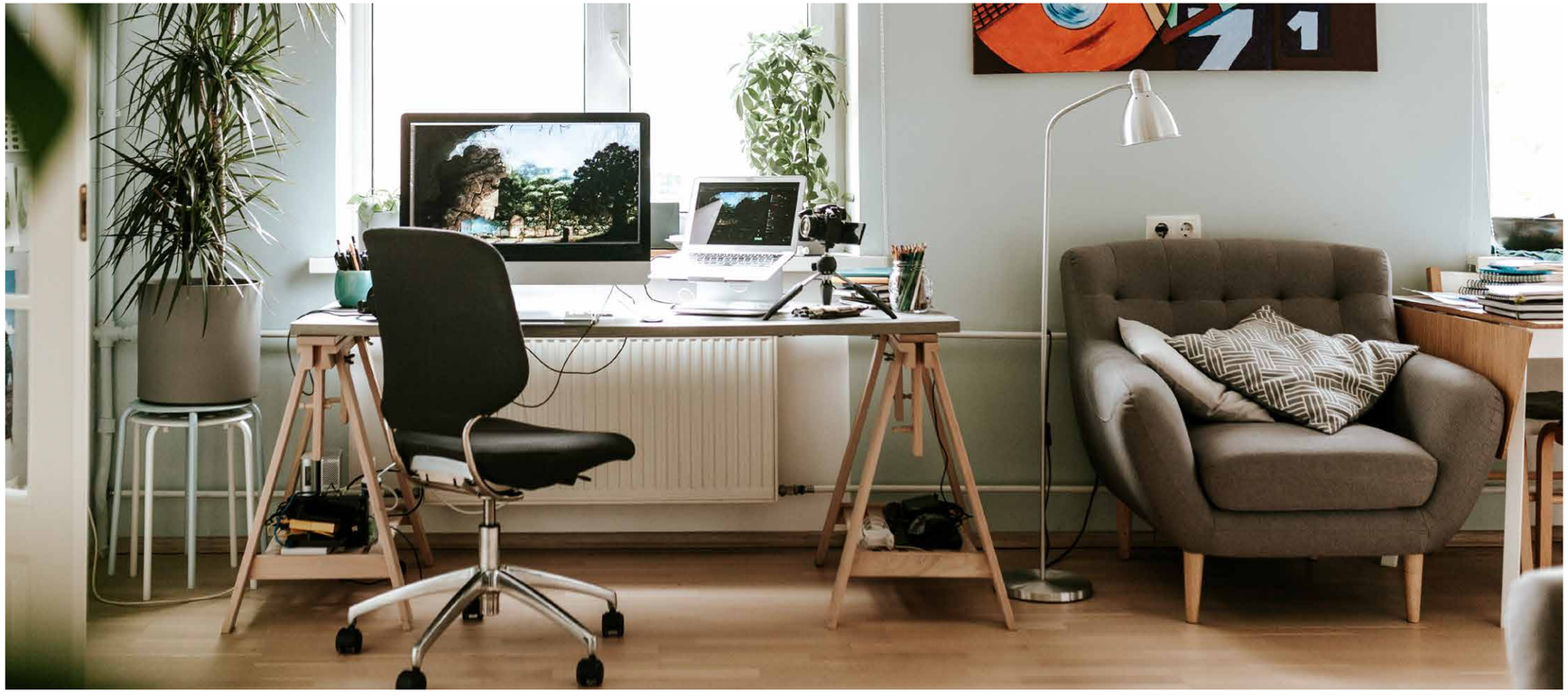


The rapid evolution of information and communications technology (ICT) has transformed our business and social lives in recent decades. It seems almost impossible to believe that the smartphone became a teenager at the height of the Covid pandemic this year. We now take it for granted that the phone in our pocket contains far more computing power than the desk-bound machines in our office at the turn of the century. Businesses that had already invested in technology to support flexible working were at a clear advantage, but prevalence of broadband connections, home computing and personal mobile technology meant that most professional employees were already equipped with the basics for working remotely. Whilst not without its challenges, 'BYOD' or 'Bring Your Own Device' actually forms part of many organisations' IT strategy – reflecting the fact that many individuals' personal technology matches or exceeds that provided by their employer.

It is not just the widespread availability of hardware that meant many companies were far better placed to survive the shift to homeworking than would have been the case even a decade ago. The ubiquity of communications platforms that allow remote access to filing systems and internal networks, together with the advent of 'SaaS' or 'Software as a Service', provides unparalleled flexibility for organisations to support homeworking.

There is clearly a difference between an environment that works, and one that works well. Leesman measures employees' experiences with the places they use for work through standardised surveys. The aggregated data has created a benchmark for both office-based (800,000 respondents) and home-based working experiences (145,000 respondents). By compiling the results from across the globe, they analyse the views and experiences of thousands of employees. Results obtained prior to the onset of COVID-19, when the vast majority of employees were office-based, can be compared with equivalent but more recent data from surveys of homeworkers.

All workers recognise the importance of a desk and chair – but absence may make the heart grow fonder, with homeworkers seeing these as crucial

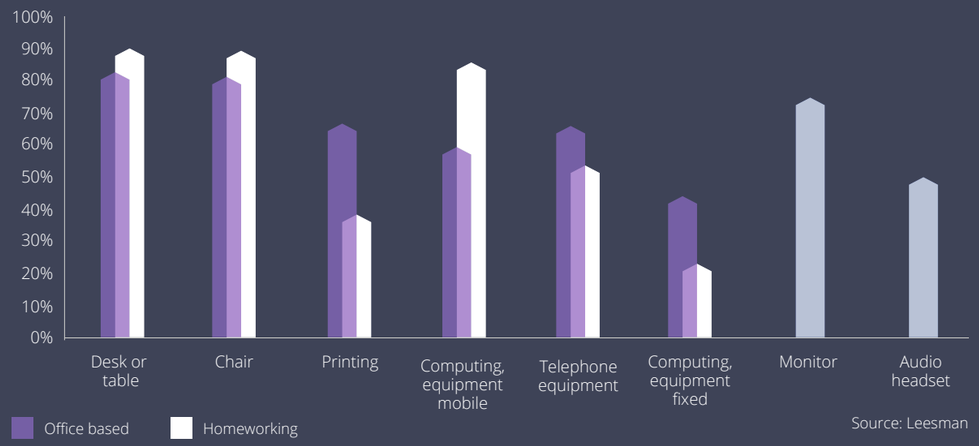


The differences help highlight how well employees have adjusted to working from home, and why.

A kitchen table and chair may work well in extremis, but is neither safe nor ideal as a workstation longer term... or even short term, when the kids need their tea! When asked about the physical features of their work environment, all workers recognise the importance of a desk and chair – but absence may make the heart grow fonder, with homeworkers seeing these as particularly crucial. They also place elevated emphasis on a laptop – and on access to a monitor and headset, which weren't included in the surveys of office workers.

Homeworkers have clearly adjusted their working practices, however, by printing less. Whilst perhaps surprising at first sight, the lower emphasis homeworkers place on telephone equipment may be due to increased use of video-conferencing, teamworking software and 'Voice over IP' internet telephony.

IMPORTANCE OF FEATURES: OFFICE VS HOMEWORKING



Source: Leesman

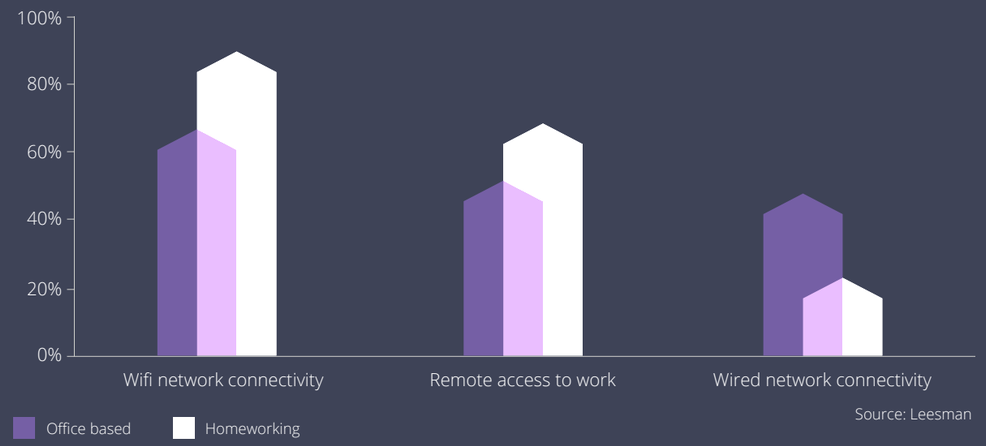
When asked about the importance of certain work features, homeworkers unsurprisingly place greater emphasis on flexibility and quality of connectivity than their office based counterparts.

Unstable internet connections and hardware inadequacies have been a frustratingly familiar feature of the summer of 2020. Nevertheless, the ubiquity of communications technology through Zoom, Microsoft Teams or a number of other providers has enabled at least some degree of management and social interaction between teams.

Despite some frustrations, the pace of technological change and expenditure on tech infrastructure means that many current ICT challenges could be far less of an issue in future – particularly if governments, companies and individuals continue to prioritise investment in 'flex tech' over the next few years in the way they have over the last decade.

The evidence from 2020 is that a high proportion of people – 47% according to the ONS - were successfully able to shift to homeworking as a result of the virus

IMPORTANCE OF IT CONNECTIVITY: OFFICE VS HOMEWORKING



Source: Leesman

To some extent the same applies to the physical environment in which people have been forced to work. It is easy to forget that homeworking is only possible for people doing certain types of work from certain types of homes. Residential properties designed for living rather than working may struggle to accommodate multiple homeworkers, particularly for younger employees living in high density urban areas where space is limited and shared housing commonplace. However, after their recent experiences, renters and homebuyers will pay more attention to how well their next house or flat can support their workstyle as well as their lifestyle if the need arises – and one would expect landlords and developers to respond accordingly.

At the end of the day, whilst many jobs, many homes and many people may not be suited to homeworking, the evidence from 2020 is that a high proportion of people – 47% according to the ONS[12] - were successfully able to shift to homeworking as a result of the virus with little or no immediate impact on their ability to perform their basic job,

So what happens if we shift focus from the most basic level of work enablement to Tier 2 – Maslow's level of 'safety', which we equate with a broader sense of security and comfort with our workplace and working relationships?

Tier 2

The need for security and comfort

Maslow argues that once we have secured what we need to exist, our attention can turn to preserving that existence through a focus on safety. In a workplace context, we believe this represents a desire for a physical and management environment that offers security and comfort.

At its simplest, this includes not just basic provision of important workplace facilities but doing so to a standard that helps employees feel comfortable and supported in their working environment. Thus Leesman examine not just how important such facilities are, but how satisfied employees are with what has been provided. Comparison between the two metrics is instructive. Companies are doing far better at satisfying worker requirements for desks and printers than they are at meeting other needs.

This is particularly true of the provision of chairs, which workers rate as highly important but are far less satisfied with what is being provided. Worryingly but not surprisingly, employee satisfaction with their chair is even lower amongst homeworkers. Given that this is potentially a significant health and safety issue, with Repetitive Strain Injury (RSI) and back injury integrally linked to incorrect positioning of chairs and monitors, this is an issue that employers of homeworkers should investigate as a priority.

Create a comfortable safe working environment that enhances employees' feeling of wellbeing

MANAGEMENT

These include having formal contracts of employment as well as benefits such as a pension scheme and sick pay. There is also an emphasis on health and safety in the working environment through the provision of policies.

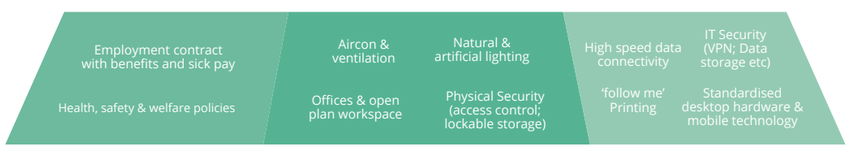
WORKPLACE

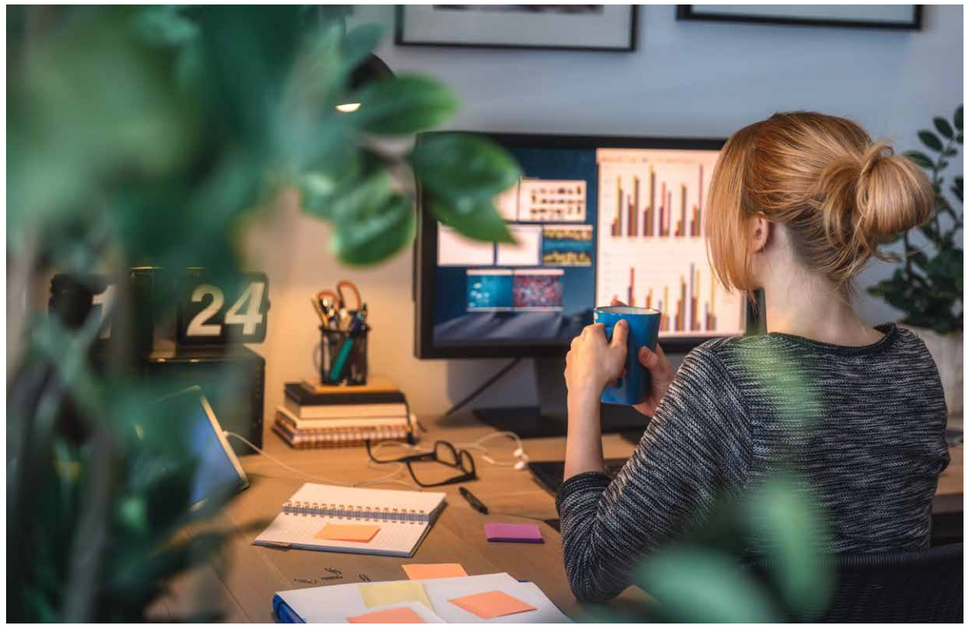
The office is a mix of offices & open plan workspaces with the ability for the occupier to have some level of control of the environment.

Physical Security is provided through the installation of access control and lockable storage

KNOWLEDGE

Online Safety, Privacy, and Cyberbullying Prevention. IT supported through the provision of a Comms room and data stored either on in-house servers or a cloud based provider.





Important as they are, the quality of the working environment extends well beyond the provision of physical infrastructure such as desks and chairs. There is extensive research around the impact of different aspects of the physical environment on workplace productivity. Whilst precise impacts may be hard to quantify, it seems intuitively correct that knowledge workers will be more productive if they feel happy and comfortable in their workplace. Launched in 2014, the WELL Building Standard was the first standardised rating system to focus on this area. The standard evaluates a range of environmental factors that scientific and medical research have linked to levels of human health and wellness (see opposite).

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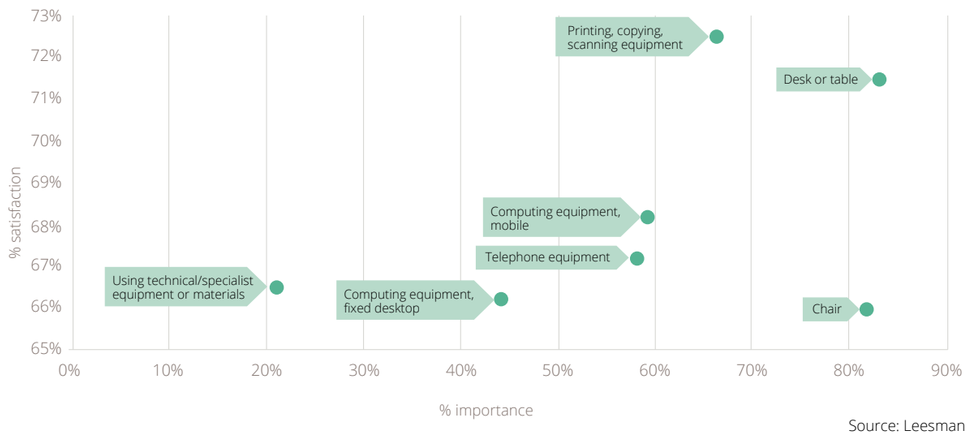
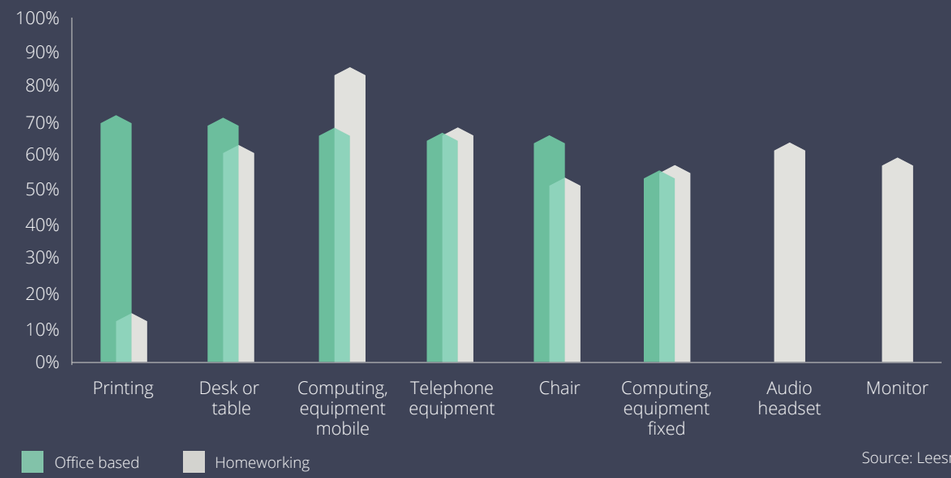
IMPORTANCE OF VS SATISFACTION WITH WORKPLACE FACILITIES IN THE OFFICE



Source: Leesman

WORKPLACE FACILITIES SATISFACTION LEVELS: HOME VS OFFICE



Source: Leesman

WELL BUILDING STANDARD FACTORS

- Air – the quality of indoor air
- Water – the availability of fresh water
- Light – the quality of artificial and natural lighting
- Nourishment – the health of the food environment
- Fitness – the promotion of physical activity
- Comfort – the impact of noise and temperature
- Mind – a positive state of mental well-being

In an interesting parallel to our adaptation of Maslow's hierarchy, the latest Well v2 standards incorporate the additional concepts of Community (a culture of diversity, inclusion and engagement) as well as Materials (aimed at avoiding exposure to harmful chemicals).

- AIR
- WATER
- NOURISHMENT
- LIGHT
- MOVEMENT
- THERMAL COMFORT
- SOUND
- MATERIALS
- MIND
- COMMUNITY
- INNOVATION

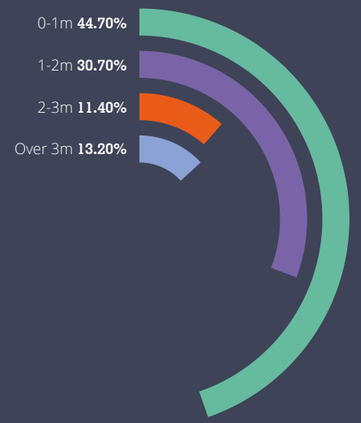
The recent shift in thinking towards health and wellbeing has perhaps been at least partially a response to the shift towards high density workplaces over recent decades. According to research by the BCO, average floorspace per desk has fallen from 11.8 sq m in 2008 to 9.6 sq m in 2018[13] – which implies an almost 20% increase in office occupation densities. Whilst ventilation technology and office design have also continued to evolve, it is likely that such higher densities have an impact on employee perceptions of the workplace environment, if not its actual quality, in several ways.

First, noise. Leesman survey results suggest that only 32% of office workers are satisfied with the noise levels in their office. Banbury and Berry' 2005[14] article reports that 99% of people reported a fall in concentration when exposed to background noise such as phone calls and neighbouring conversations The prevalence of open plan working brings about levels of noise and interruption that are not always ideal for workers.

Second, temperature and air quality. In theory, modern HVAC (heating, ventilation and air conditioning) machinery coupled with sophisticated computerised building management systems (BMS) should mean that air quality remains at a consistently high level, even at higher occupation densities. Awareness of the environmental impact of buildings is encouraging an ongoing shift towards natural ventilation, which is seen as both sustainable and beneficial for employee wellness. The COVID-19 pandemic has highlighted concerns over air quality, with employees particularly worried that air conditioning systems may be responsible for spreading[15] the virus – albeit that a recent ECDC assessment of available research evidence concluded that the risk is low, and HVAC systems may help reduce the risk of infection by continually introducing fresh air.

SATISFACTION AND IMPORTANCE OF NOISE LEVELS: PRE-COVID

ACCESS TO DAYLIGHT - DISTANCE SAT FROM A DAYLIT WINDOW WORKING FROM HOME

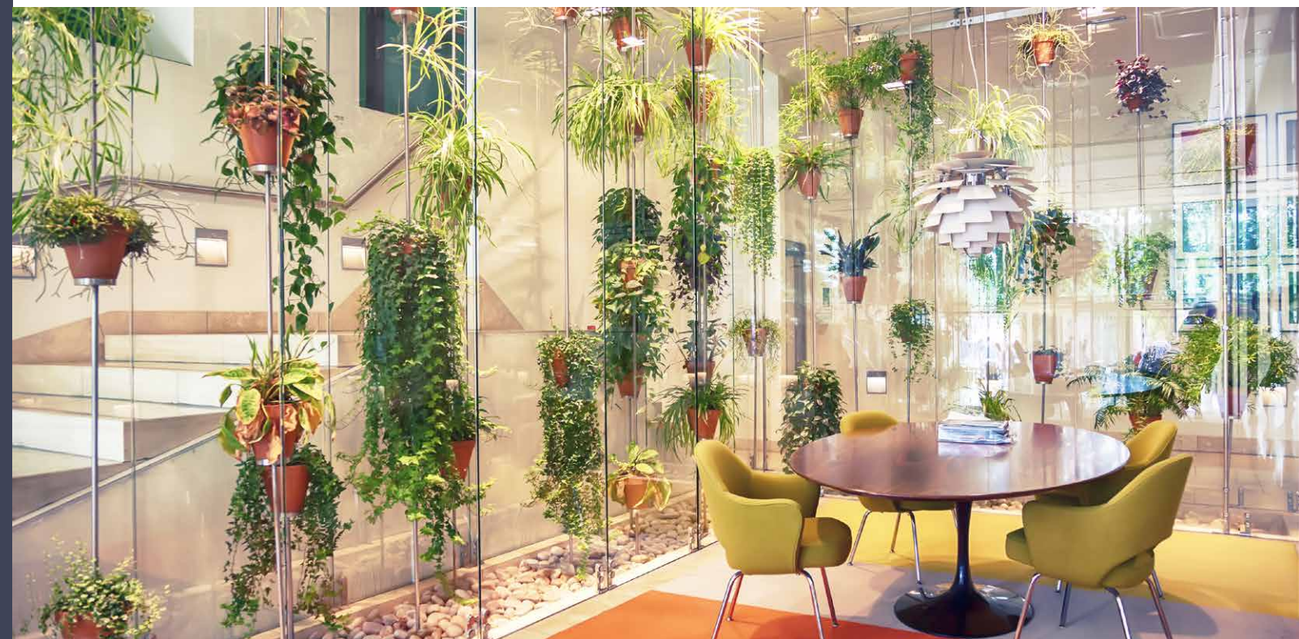


Source: Cundall lighting survey data

HVAC systems can also help maintain an optimum average temperature across spaces. However, averages can be unhelpful. It is difficult to ensure that all areas of a space are actually maintained at the target level, and individuals vary in their preferred environmental temperature. This is less of an issue in a workplace of cellular offices where individuals have a degree of control over air and temperature that isn't available to open-plan workers.

This is an important issue from two perspectives: employees sense of control over their environment, which is likely to influence their general sense of wellbeing, and their satisfaction with that environment. In a 2015 survey by Software Advice[16], 40% of respondents had no say in the temperature of the office and over half felt dissatisfied with the temperature several times a month or more. While a seemingly a superficial indicator of comfort, a study by Wan et al (2011)[17]. found workers saw a 6% fall in productivity at warmer temperatures and a 4% fall in productivity at cooler ones. (NB Neutral: 22°C / Warm: 30°C / Cool: 18°C).

Third, light. Humans are influenced mentally and physically by both natural and artificial light in a variety of ways that. In addition to having adequate lighting to complete work tasks, exposure to particular types and durations of light is known to influence our circadian rhythm (or internal 'body clock') and our mood, as well as our mental and physical health. Recent research by Cundall[18] showed that over 75% of homeworkers sit within two metres of a daylit window. This is likely to be far higher than in an office environment, which is encouraging for those working from home. Against this, however, may be the inadequacies of the artificial lighting available to supplement natural daylight when working from home.



It is certainly interesting that during the recent pandemic many homeworkers are reporting that their current home workplace enables them to work more productively, compared to the office environments. At least part of this may be due to having greater control over their immediate environment - including what they wear whilst "at work" which can be more easily tailored to the conditions. But what is particularly telling is the differences between office-based employees and homeworkers in how well they feel their environment supports different types of work.

Employees suggest that the home is a more supportive environment than the office when engaged in individual working, and particularly when reading or thinking creatively. It seems highly likely that this is because employees feel more comfortable in an environment they can control and which is, in general, less subject to noise and unwanted interruptions.

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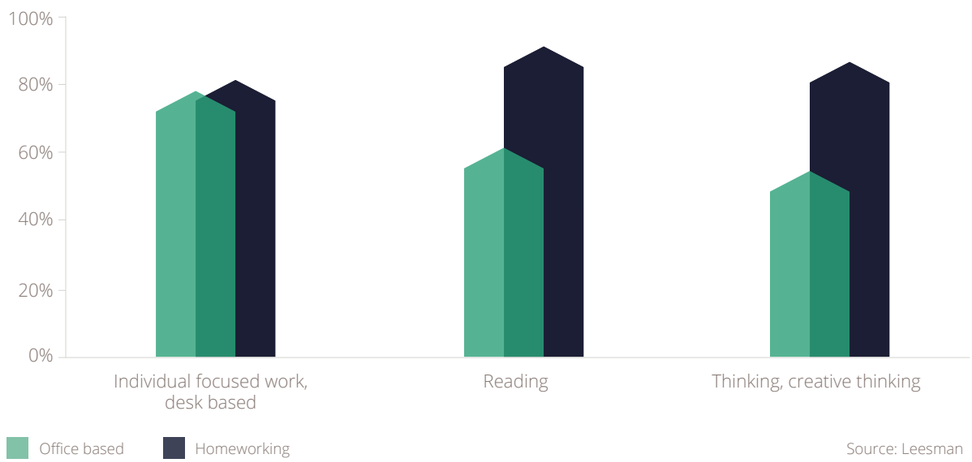
SUPPORT FOR FOCUSED ACTIVITIES: OFFICE VS HOMEWORKING



Source: Leesman

Clearly this general conclusion does not apply universally. Our homes are far from distraction-free at the best of times and remote working requires a degree of self-discipline which not everyone possesses. Some homes are less free from distraction than others; the smaller the space and the greater the presence of young children, the less conducive the environment is for homeworking.

Nevertheless, the evidence of the pandemic is that homeworking may be a more suitable environment for at least some types of work, for at least some people. This is likely to be due to a combination of factors, unique to each individual but reflecting greater levels of comfort with an environment over which they have more control, and particularly where they experience less distraction from the tasks on which they want to focus.

The Need for (Data) Security

Homeworking creates a particular challenge for companies around the issue IT and data security. How do you provide employees with 'anytime, anywhere' access to corporate systems whilst also keeping such systems secure?

As a company's employees will need to access files from multiple networks, and rely on software packages to transmit information, cyber-criminals have an increased chance of gaining access to confidential information which puts businesses at significant risk. Within the office, IT departments are better able to control the security of the company-wide internet provision.

Home WiFi networks however are likely to have fewer protocols in place which allows hackers to more easily access the information, which can become a particular issue for businesses that may not have the financial resources to provide staff with an office laptop, subject to remote access security controls. VPNs can help protect data but workers may also need to adapt in other ways to see long-term success working-from-home. According to a study by Barracuda Networks, a security company, in March 2020, phishing emails saw a 600% uptick in a single month as cyber criminals capitalised on the uncertainty brought about by Covid-19.[19]

Tier 3

Need for belonging

Collaboration in the workplace through the provision of the facilities, technology and management tools

MANAGEMENT

Diversity and Inclusion polices are in place which are enhanced through technology, providing employees with the ability to voice concerns anonymously, and helping employees feel comfortable speaking up.

Promoting group working across teams, departments and different levels, as well as encouraging team building through social activities can help satisfy these needs.

WORKPLACE

Whilst the space is designed predominantly for individual work, a sense of belonging can be enhanced through the way that the office is designed to create opportunities for collaboration, team work and social interactions with the introduction of open plan working and breakout areas.

Culture and brand are integrated into the design to engage a feeling of belonging

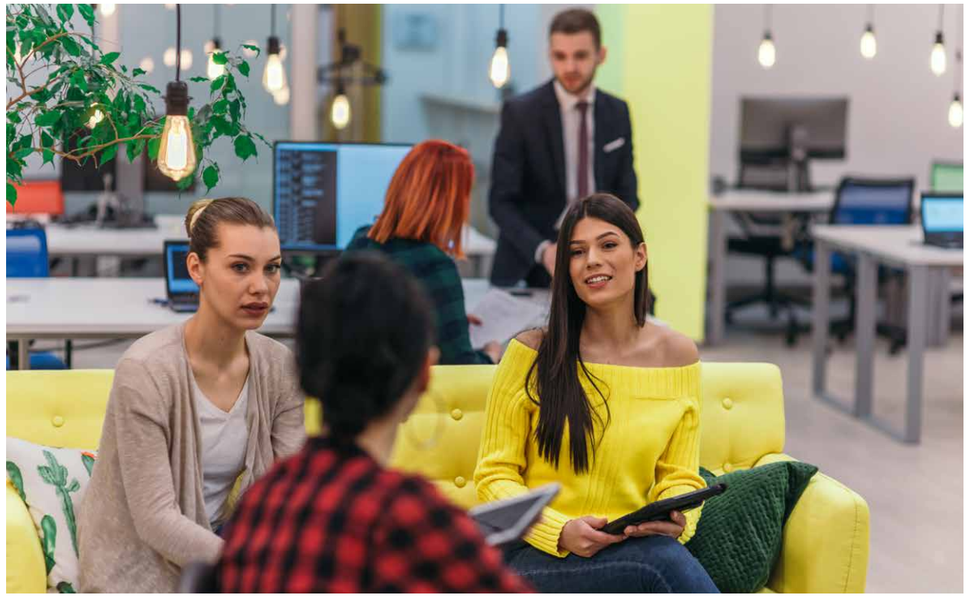
KNOWLEDGE

Collaborative platforms & tech - including chat functions and intuitive sharing tools can facilitate and foster connections with co-workers; clients and key stakeholders.

Thus far we have considered the issue of productivity and the workplace from a purely personal perspective, but Maslow emphasises that once we feel safe and secure, we begin to focus on our relationship with others and our need for a sense of belonging. In a workplace context, this equates to the way we interact with our immediate team-mates and the wider members of our organisation – and how we identify with that organisation as a whole.

Humans are social animals and the desire to "belong" is a natural one. Our sense of identity is rooted in our relationships and affiliations with others – whether that be our families and friends, nationality, our clubs and societies or the sports team we support. Our relationships at work are no different – work plays an important social role in our lives, as we develop personal relationships with colleagues and identify with our team, department and company as a whole.

A communal workplace plays an important part in this process, fostering a sense of shared identity by literally bringing people together. Intriguingly, this doesn't always have to involve positive interactions – common experience contributes to our sense of belonging even if that experience is negative. Indeed, research by Nahemow & Lawton (1975)[20] and Wilder & Thompson (1980)[21] found that proximity and interaction brought about a strong sense of belonging amongst surveyed groups, even in cases where there were feelings of dislike between group members. Many families who experienced several months of lockdown in the spring of 2020 will happily corroborate these findings!



The office plays an important role in facilitating interactions by acting as a convenient place to meet. Whilst many would argue that they detract from productivity rather than contribute to it, formal meetings are a part of life at work. Daily briefings, weekly catch ups, monthly committee meetings and ad hoc project steering groups habitually meet on a regular basis. Leesman data shows that when asked about the importance of various functions or physical features of the office, employees have two priorities: a place to meet, and catering or refreshment facilities. When asked how satisfied they are with different aspects of their workplace, planned meetings consistently rank as the activity that offices support best.

One might assume that being forced to work from home would deprive us of this important opportunity to interact, but one of the most significant impacts of COVID-19 has been the dramatic growth in video-conferencing to replace face-to-face contact. Zoom calls and Microsoft Teams meetings have become the norm, driving a significant shift in working practices as teamworking apps and shared electronic documents replaced physical meetings and paper copies of reports almost literally overnight.

There have been small wins for the environment as printing and long distance business travel have been reduced. Perhaps most significantly, this clearly has impacted employee perceptions of how well formal meetings have been supported whilst homeworking - but not in the way you might expect. Satisfaction levels with planned meetings rose from 80% amongst office employees to 93% amongst COVID-19 homeworkers.

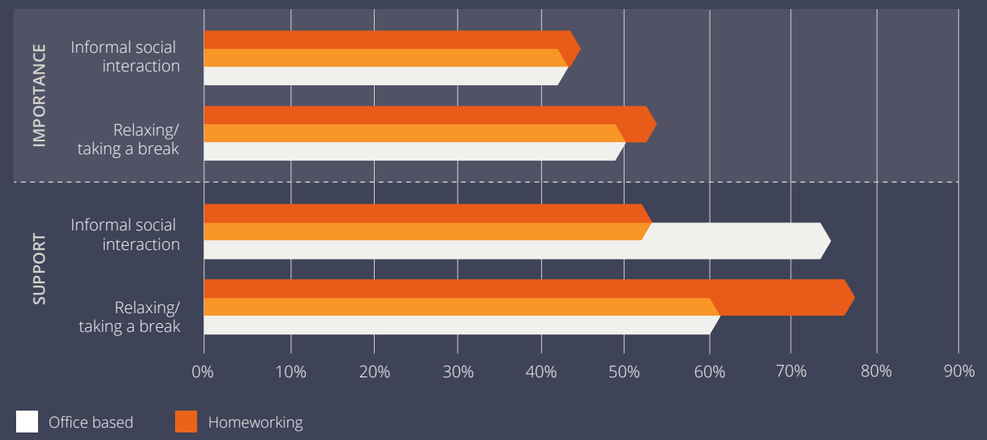
Whilst almost certainly due to a combination of factors, some of which may be replicable following any return to the office, it is clear that working remotely does not inherently reduce the efficacy of formal meetings.

But offices also play an important role in facilitating informal social interactions and providing a place to take a break or relax during the working day. Whilst not regarded as the most critical aspects of the workplace, they both became seen as more important post-COVID when people were forced to work from home. Not surprisingly, the home environment was seen as far more conducive to taking a break from work – but this was at the expense of informal social interactions with others which were clearly harder to maintain whilst working remotely.

Whilst many groups have made efforts to replicate the social aspects of office life, there is a limit to the appeal of "virtual drinks" with your team-mates; the idea that this could become the norm for workplace social interaction seems hard to accept.

When asked about the importance of various functions or physical features of the office, employees have two priorities: a place to meet, and catering or refreshment facilities

SOCIAL INTERACTION IMPORTANCE LEVELS: HOME VS OFFICE



It remains to be seen whether extended periods of enforced remote working would detrimentally impact relationships at work, although there is increasing evidence of issues around work overload, feelings of rejection and lack of voice. Moreover, a further complication emerged as some employees started returning to the office whilst others remained at home. Virtual meetings may work well when everyone is connecting remotely – but we have all experienced the sense of being slightly peripheral to the discussion when 'dialling in' to a meeting when everyone else is physically present. Combined with the sense of FOMO ("Fear Of Missing Out") from a social or career perspective, it will be interesting to see whether the need for social interaction is a material factor in encouraging people back to the office if and when the immediate impact of COVID-19 subsides.

It also seems likely that people will be affected differently depending not only on their roles, but on their status and longevity within the organisation. Those who are well established in their positions with networks of longstanding relationships will find it easier to transition to interacting remotely. In contrast, those who are new to an organisation may find it harder to settle themselves and develop new relationships that are critical to effective co-working.

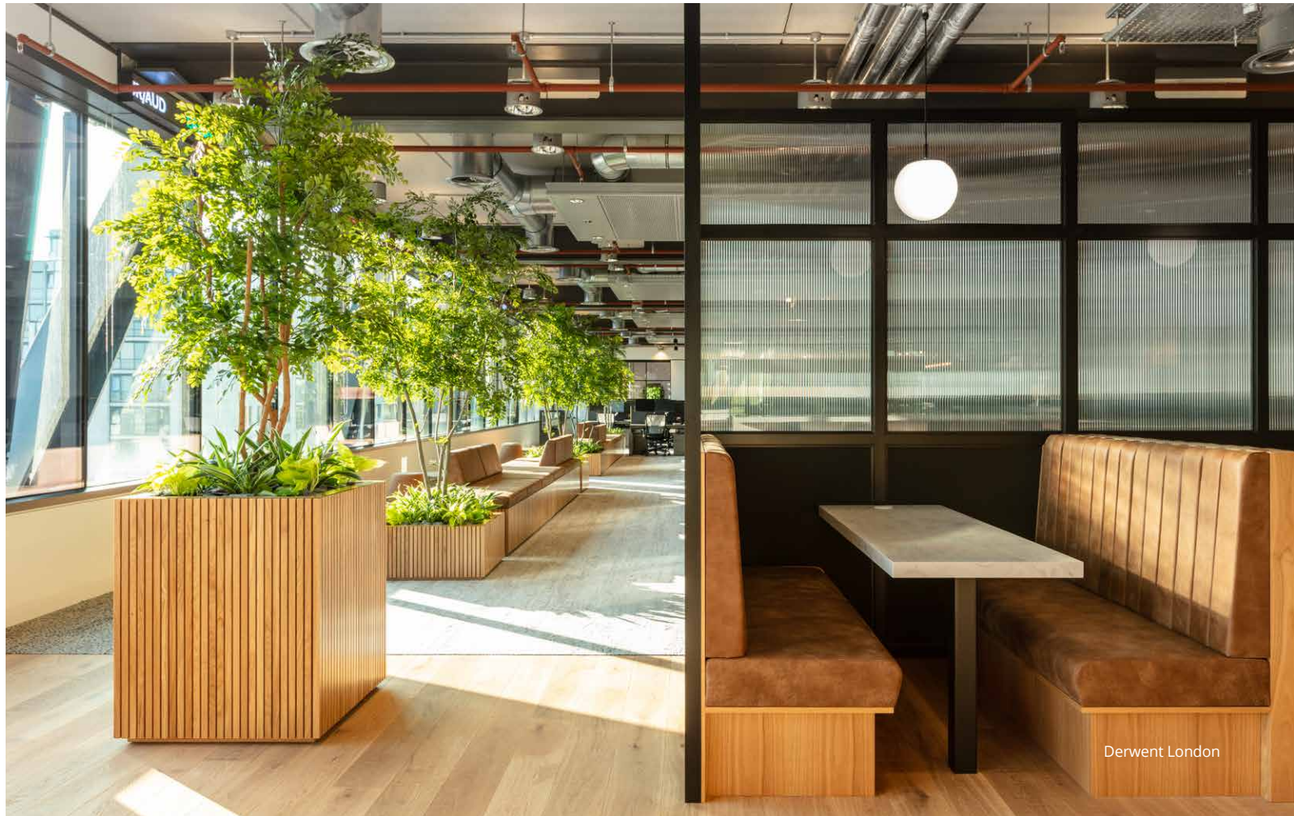
The challenge will be particularly critical for new employees who may struggle to understand a company's culture and build strong relationships with colleagues without the help of a common physical environment to foster a sense of belonging. The issue has direct relevance for company balance-sheets, given that a primary reason new hires leave businesses is bad experiences during their onboarding. According to a study by the Harvard Business Review (2018),[22] organisations with standardised processes to welcome new employees see 62% greater new-hire productivity and 50% greater new-hire retention. This is clearly an area that merits close attention by HR teams that would previously have used physical meetings, away-days or even extended periods of communal learning and development as core components of their onboarding procedures.

It Is not just our connections with others that foster a sense of belonging, however. Humans also identify strongly with places – think of the sense of familiarity when returning home, or landing back at the local airport after a trip abroad. Our workplace is no different, as we identify strongly with our team's area of the office and particularly our own office or desk. Even the language we use to describe the sense of belonging - "fitting in" and "having a place in the organisation" – typically has a physical dimension to it. We will return to the issue of identification with personal space in subsequent sections of this report.

It will be interesting to see whether the need for social interaction is a material factor in encouraging people back to the office if and when the immediate impact of COVID-19 subsides

At a higher level, the physical space occupied by a company is an important component, and therefore a reflection, of its corporate culture and identity. Prestigious headquarters buildings in the most expensive locations may be no longer be in vogue as statements of corporate success – but a company's office space is a statement nevertheless. Moving to a new headquarters building is a long-established way of uniting two halves of a newly-merged company, symbolising a fresh start and embodying aspirations for a unified culture.

Indeed, many organisations have used their workspace to drive cultural and operational change throughout their organisation, in some cases to the extent that it becomes a key part of their corporate identity. You know what the images are going to look like when you search for "Google workspace" long before you start typing into their search engine. The bright primary colours, variety of funky spaces and scattering of beanbags reflect not just the brand of the company but its entire culture. This becomes critical as we move towards the upper levels of our Maslow-derived hierarchy, where we shift from working alongside others to working with them. The role of the workplace therefore shifts from being a place of shelter within which to work, to a facilitator of collaborative endeavour.



Derwent London

Tier 4

Feeling of accomplishment

A need to identify with others through a sense of belonging, we have a need to be respected and valued by those with whom we associate

MANAGEMENT

Creating a culture that has respect for others and praise is important. A 360-degree feedback and appraisal system can help recognise employees' contributions and a peer to peer or social recognition programme will celebrate employees' achievements and grant prestige and respect.

WORKPLACE

Optimised for individual; collaborative & communal work

KNOWLEDGE

Platforms to enhance learning (including digitally upskilling) through the application of HR & Learning Management Systems and CRM IT Systems. Workplace Analytics & data allows effective building management by monitoring workplace utilisation, factors effecting employee performance and characteristics impacting workplace culture and workplace design.

Maslow emphasises that just we have a need to identify with others through a sense of belonging, we have a need to be respected and valued by those with whom we associate. A feeling of accomplishment and worth develops where employees realise for themselves – and are recognised for - their value to the organisation. That value may be inherently individual, but for many of us true accomplishment comes from the sense of individual contribution to collective endeavour; and for every company it is the overall results that matter, not the achievements of any one person.

To maximise those results, the whole needs to be greater than the sum of the parts. Contemporary organisations therefore focus on driving interactions between individuals and teams with complementary skillsets: collaboration is the key to success.

The underlying premise behind the desire for collaboration at the enterprise level is generally to help identify and exploit new opportunities. This involves either doing more of the same thing (for example using relationships with existing clients in one area of the business to cross-sell services from another) or doing something different (though the identification of new products or services through innovation). In either case, the key is the blending of the knowledge, skills or experience of different individuals.

Where the exchange of information is largely factual or "transactional" in nature, collaboration may be a very structured or even partially automated process. For example, identification of cross-selling opportunities within an organisation that operates an effective CRM (Customer Relationship Management) system may be a matter of analysing the relevant data to identify the potential need for a product or service – much of which can be done programmatically, and with minimal personal engagement.

However, this is no substitute for insightful recognition of an opportunity that arises out of casual conversation. Clearly fostering a culture of communication and information sharing is important in promoting such interactions, but there are other ways to stimulate collaboration and innovation. Contemporary office design goes well beyond provision of adequate space for formal or planned interactions, with specific emphasis placed on creating 'collision spaces' where unplanned interaction is actively promoted.

The process of spontaneous innovation through chance encounter is often referred to as the 'water cooler effect' and strategically located refreshment facilities, including communal cafeterias, are a key tool for designers looking to promote such interaction. The idea is to encourage conversations about challenges or successes, projects being worked on or clients being worked with – in the hope these will spark ideas that lead to new business opportunities. Internal stairways, walkways taking indirect routes through the workspace and configurations of office furniture to direct flow through the office are therefore used as ways of encouraging encounters which might otherwise not take place. This is, of course, precisely the same effect that the co-working movement seeks to capitalise on, by cross-fertilising ideas between entrepreneurs and organisations rather than within a single enterprise.

LEARNING FROM OTHERS: OFFICE V HOMEWORKING

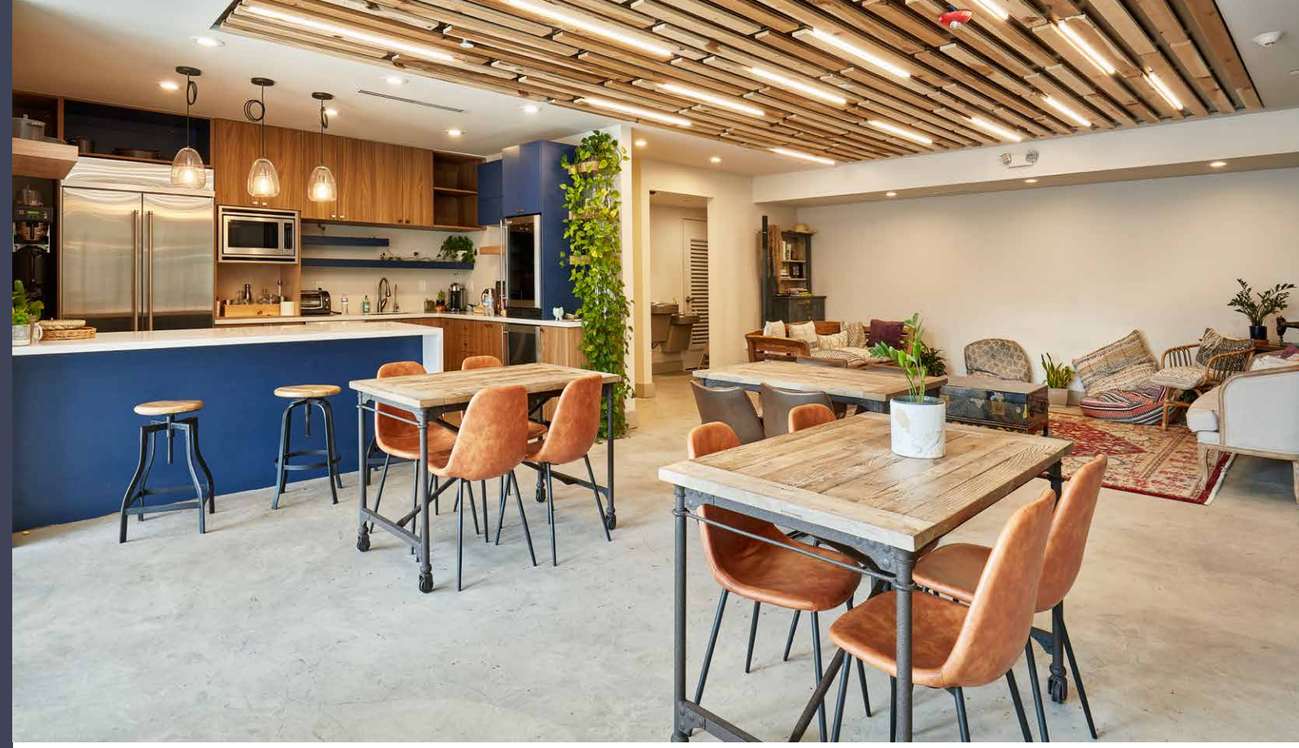
Supported office

78.1%

Supported home working

69.4%

By being near colleagues and sitting in on team meetings, less experienced colleagues can learn from others without necessarily requiring a period of formal training



Once an opportunity or project is identified, workspace also has an important part to play in facilitating the collaborative work needed to exploit or complete it. Thus break-out spaces can accommodate for short, informal interactions; team spaces provide a long-term home for groups who work together for an extended period, and project rooms can be tailored to a particular group or initiative as and when needed.

Furthermore, it is worth noting that a significant proportion of training and development within an office is informal and by osmosis. By being near colleagues and sitting in on team meetings, less experienced colleagues can learn from others without necessarily requiring a period of formal training. According to Leesman data, this support for learning from others at home fell significantly relative to the office survey, suggesting working from home has impacted the ability of employees to learn from others and build the necessary knowledge and skills to develop in their career.

Underpinning all these approaches is the knowledge, derived from extensive research, that conventional individually allocated desks were typically unused for 50% or more of every working day.[23] Holidays, illness, business travel, on- or off-site meetings and a host of other commitments mean that individual desks are a very inefficient use of resources. Thus open plan office space, often with no individually allocated space, have become commonplace. The quid pro quo for losing your personal desk, it is argued, is that you gain access to a wide range of alternative workspaces that are actually better suited to whatever task you wish to undertake.

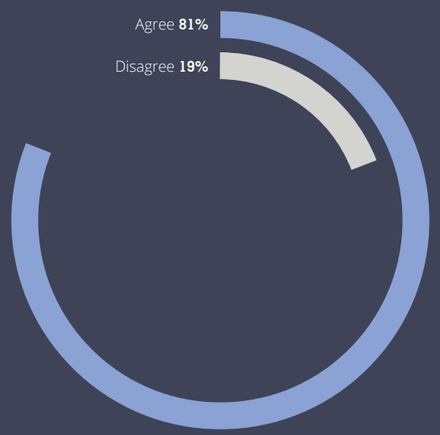
At one level, such arguments are absolutely correct. For the majority of individuals and organisations, office space today is far more efficient and effective than it was thirty years ago; it certainly accommodates and leverages technology in ways that historic office designs never could. Thus Leesman data reveals that employees appear relatively satisfied with many aspects of their office environment.

Employees generally believe their offices are most effective at supporting meetings and facilitating collaborative work. Leesman identify a distinct group of the highest performing workplaces, which are accredited as "Leesman+. These environments are generally viewed as more conducive to knowledge sharing.

Employees typically feel reading or creative thinking is better supported at home than in the office – as is desk-based individual work

KNOWLEDGE SHARING – WORKPLACE COMPARISON

% RESPONDENTS LEESMAN+
IT [WORKPLACE] SUPPORTS ME SHARING IDEAS/KNOWLEDGE AMONGST COLLEAGUES



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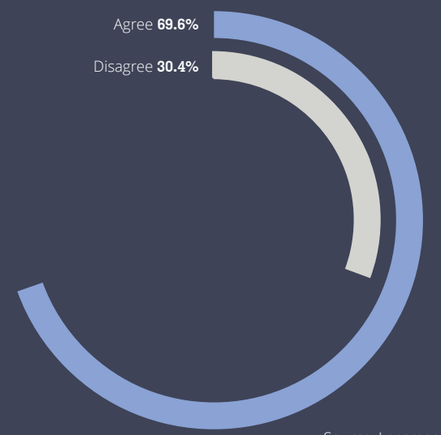


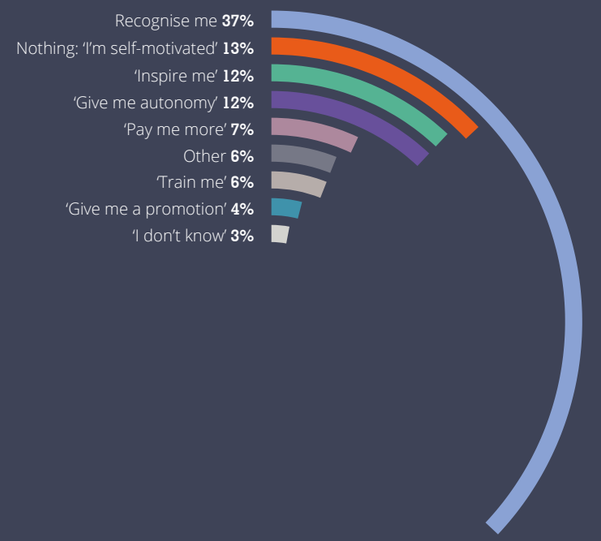
Source: Leesman

As we saw previously, employees also typically feel reading or creative thinking is better supported at home than in the office – as is desk-based individual work. All in all, contemporary office environments appear to be underperforming expectations across multiple perspectives, and are seen as inferior to the home as a working location by many. Small wonder that this has led employees to question why they should return to the office post-COVID, and some commentators to question whether offices have a future at all.

Part of the explanation for employee dissatisfaction with their workplaces – particularly relative to their experiences at home – may lie buried within our desire to be respected and valued as individuals. In the search for collaborative success, have we lost sight of our individual need for recognition?

According to research by O.C. Tanner (2019),[24] a global HR consulting firm, 37% of respondents said more personal recognition would encourage them to produce better output more regularly. The same organisation found that when leaders do not effectively communicate accomplishments, employees are 70% less likely to feel appreciated, 74% less likely to stay at the organisation, 42% less likely to be "engaged" with their employer and 46% less likely to promote their organisation.

MOST IMPORTANT DRIVERS OF 'GREAT WORK'



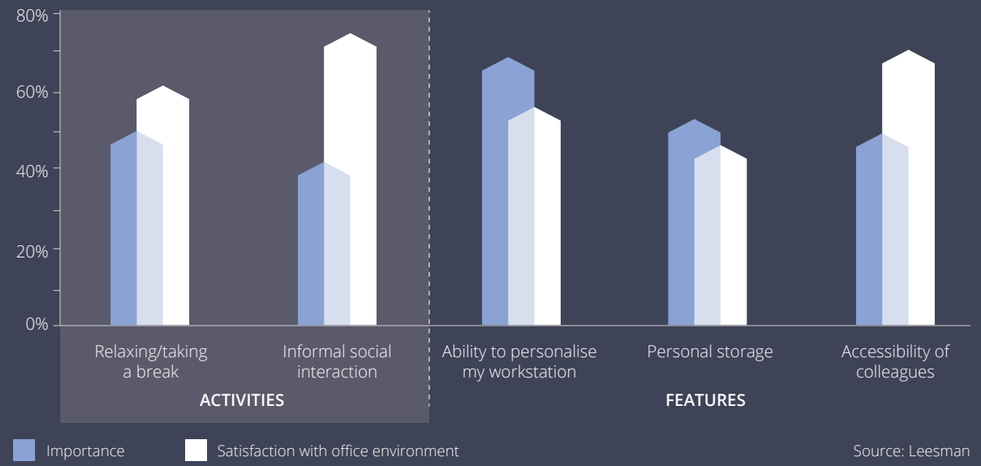
Source: OC Tanner

This reinforces the fact that our work experience is influenced by many different factors, within which management culture and behaviour is clearly a crucial element. It is important to create a culture that doesn't over emphasise the need to be collaborative and work as a team, so that people recognise the importance of being an individual and don't end up feeling like 'just a cog in the machine'.

It is important to create a culture that doesn't over emphasise the need to be collaborative and work as a team, so that people recognise the importance of being an individual

Data from Leesman reveals that there is a workplace element to this which may be being overlooked. When asked about the office activities and features they feel are important, employees rate the ability to personalise their workstation and access to personal storage more highly than connectivity with their colleagues; yet these are the two factors where satisfaction levels with the office environment are lowest. In the drive towards efficiency and collaborative effectiveness, has open plan and especially flexible desking undermined an important aspect of our fundamental motivations at work – the desire to be respected and valued as an individual?

SENSE OF BELONGING SATISFACTION LEVELS: OFFICE



Source: Leesman

Tier 5

Self-actualisation

Create an atmosphere that supports the employee as an optimal part of the whole – from their individual contribution to a collective endeavour

MANAGEMENT

Personal development plans; training, secondments, mentoring and encouragement of promotion enables staff to be the very best they can be.

It is important that this is supported with a culture of trust to empower employees to perform at their optimal level.

WORKPLACE

Space is optimised for an individual's needs as well as collaborative space and a communal culture.

Workplaces are designed with a variety of different areas to suit the needs of tasks, providing employees with the ability to choose where they work.

KNOWLEDGE

By equipping the organisation with the latest digital tools and technology, employees can access the information needed to do their jobs well and can deliver time savings so employees can focus on more creative, fulfilling tasks. Digital tools are ultimately laying the groundwork for what workers need to grow and advance.

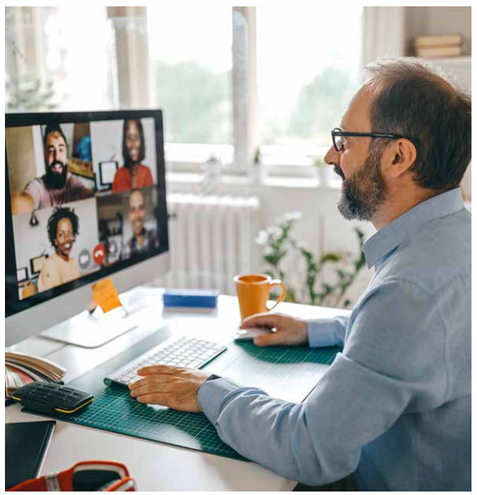
Self-Actualisation - the term used by Maslow to describe the highest level of our needs may seem somewhat esoteric, but it actually embodies some very important and recognisable elements of individual and corporate endeavour. Maslow argues that when their other needs are satisfied, people become motivated by self-improvement and a desire for personal growth. He stresses that this stage is about a journey – a constant striving to fulfil our potential and perform to the best of our ability. Crucially, Maslow further points out that our aspirations at this level will vary greatly from one individual to another. There is no single "correct" solution; it is about aspiring to be the best that we individually can be.

This is immediately recognisable as a key objective in both contemporary management theory and human resource practice. Organisations are constantly striving to re-examine and improve the way they work, to adapt to changing circumstances and competitive pressures. The role of the workplace is twofold – to provide an environment which supports this dynamic quest for individual and collective improvement, and to be flexible enough to accommodate the changes which come about as a result.

We should similarly view the "self actualised workplace" not as a fixed destination, or indeed a standardised solution. Rather it is a dynamic, aspirational and constantly evolving environment which seeks to adapt and shape itself to the changing needs of the organisation as a whole – and particularly to the individuals that make up that organisation.

We believe that it is this latter element that is crucial for today's knowledge-based businesses. The search for corporate efficiency and financial performance must be balanced with recognition that the only real assets of the business are the individuals who make up the workforce, and their individual and collective intellectual capital. The role of the workplace is to support the efforts of management to bring together the right individuals and the right information in an environment that optimises the interaction of the two. This is challenging given that two of the key factors here are inherently, and almost infinitely, variable:

- The human capital involved - every individual is unique, with their own preferred work style and ideal environment;
- The work objective concerned – the variety and type of work involved varies enormously, from routine processing to innovation and creativity; this variation exists not only between companies and individuals, but often within the working day of a single individual depending on what tasks they need to complete.



Nearly 70% of participants believed an activity-based working environment increased their productivity, and two-thirds felt their work was more stimulating

This is the reality that the latest thinking in workplace design seeks to address: the focus on activity-based working. The idea is simple – that different areas of the workplace should be optimised to support different types of work: the concept of 'neighbourhoods' within the office. Neighbourhoods optimise office-working environments by providing a combination of desk layouts; co-working zones; communal areas and private areas for focused work. Research in the Netherlands by Smulders and Clarijs (2019)[25] found that nearly 70% of participants believed an activity-based working environment increased their productivity, and two-thirds felt their work was more stimulating. Over 60% say they have more energy in an activity-based working environment.

Importantly, areas are also provided for cross-department collaboration which fulfils the absolute necessity for 'water cooler' interaction. Sky Central in Osterley for example, splits its' working area into 18 different neighbourhoods,[26] all leading, through shared staircases, in the atrium into "Sky Street" on the ground floor to encourage those chance meetings and corridor conversations. Ultimately, dynamic interaction fosters a sense of purpose amongst individuals and teams, helping the company to fulfil its potential for innovation and growth.

The provision of a selection of different environments not only supports the different tasks that need to be completed, but also recognises that humans are individuals with very different needs and personalities. Open plan environments for example, may suit "alpha" personalities who are extrovert, but can be unattractive or positively intimidating to those who are naturally more introverted, making them less productive in these spaces.

We believe that this is the key insight to be gained from the work of Maslow. He crucially reminds us that our organisations are made up of unique individuals, who all need different things to perform at their best. The better a particular environment facilitates a degree of personalisation – of light, temperature and acoustics as well as facilities, décor and ambience – the more comfortable and productive the company's key assets will be. Exactly what such an environment looks like is inherently impossible to say – precisely because it will vary from one organisation, or even one part of an organisation, to another.

We conclude by summarising the key lessons from the COVID-induced homeworking experiment of 2020, to give our perspective on the future role of the office in our working lives and the implications this may have for our workstyles and workplace design.

Workplace and productivity in 2020 and beyond

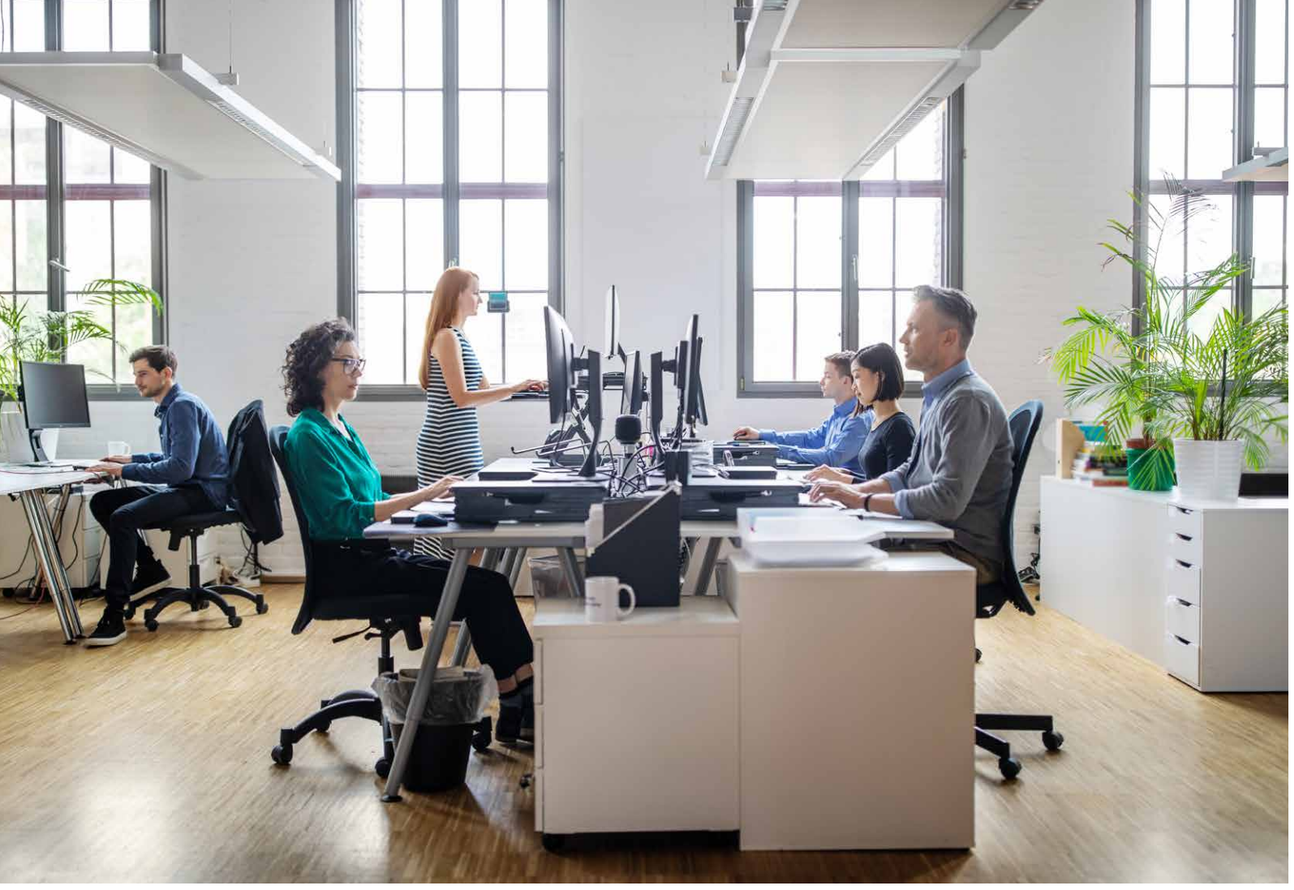
To those who are busy proclaiming the "death of the office", we would respond by quoting Mark Twain in saying "reports of my death have been greatly exaggerated".

That is not to deny that momentous changes are taking place which will have ramifications across many aspects of our lives – including our work and our workplaces. Underlying trends that have been playing out in the background have been accelerated and highlighted by the pandemic; meanwhile new issues have arisen which may – or may not – become a permanent part of our lives.

The fact that many of us have spent several months working from home moderately effectively does not overturn decades of research which concludes that people work more productively having built mutual trust and cooperation, facilitated by physical proximity. So why do so many people seem to have concluded that the office offers little benefit over working from home?[27, 28] We believe that there are some obvious short term explanations.

For most organisations the immediate response to the COVID crisis was to go into "emergency" mode, trying to keep basic business activity going - generally focussed on supporting existing clients and projects. In many cases this involves executing the types of work which are most suited to working remotely, which require only the "lower level" workplace needs of the employee to be met.

In this situation, consider the position of the employee. Provided they have access to appropriate technology and connectivity, they are freed from their daily commute[29] (viewed by Londoners as more stressful than going to the dentist)[30] which is replaced by their exercise of choice or more time sleeping. They no longer have to deal with the distractions or the politics of the office, allowing them to focus fully on the tasks at hand. Their home study is personalised with photos of the dog that is curled contentedly at their feet while they sip their preferred choice of morning coffee from their favourite mug. Video conferencing allows them to contact colleagues and clients – individually or en masse – from the comfort of their desk. An end to tedious business trips across timezones means jetlag is a thing of the past, to the benefit of the planet and the expense line of a budget under pressure from the sharpest economic decline in human history. What's not to like?!



Provided the individuals concerned are lucky enough to have a home environment that supports their work, it isn't surprising that – at first sight - homeworking may be deemed (and in some cases actually be) more productive. The qualification here is important, though… there will be many for whom the description above is a far cry from their homeworking experience! Young children, small apartments in shared accommodation or inadequate internet connections can all conspire to hamper the most determined homeworker.

Before concluding that demand for office space is inevitably set to decline, we should recognise that the homeworking experiment is still in its early stages. Employees and organisations may be able to survive – for a time – working from home or some other remote location. For some people, it may indeed form a part, or conceivably the majority, of their future working practices.

But as organisations move from 'survival mode' to refocus on growth and development, we will see greater emphasis placed on teamwork, inter-departmental collaboration and innovative thinking. Building new relationships with colleagues and clients is easier to do in person. How well most people or organisations would fare if asked to work remotely for an extended period has yet to be seen, and the benefits of the office environment may yet become more apparent.

Some organisations will undoubtedly downsize or close offices – such actions are a normal feature of recessions. Many will experiment with "going virtual" to some degree - and such experiments will be watched with interest. Others may decentralise, moving parts of their organisations out of major cities into suburban or smaller town locations, to enable cost saving and respond to emerging preferences for working in locations closer to home.

Far from being dead, we are entering one of the most exciting periods ever seen in the evolution of the workplace.

Equally, many large organisations also need to attract the best young staff entering at junior levels who typically want to live, work and socialise in city centres – for whom homeworking is neither an option nor an attraction. They want to work in a vibrant office environment, with access to a variety of senior staff with whom they can interact to develop their skills and careers – none of which can be done entirely over Zoom.

What seems clear is that flexible working is likely to remain at least part of the solution in future.[31] From where we sit today, it seems hard to believe that we will universally return to a "9-5, 5 days a week" life in the office. Initial findings from our research, both before and during the pandemic, indicate that a hybrid working environment (a mix of office and homeworking), allows employees to be their most productive.

But the pandemic has highlighted some important lessons that we need to consider when thinking about the future role of the workplace. Contemporary offices may offer high quality collaborative spaces that play a vital role in promoting innovation and cross-fertilisation of ideas. But too often, the reality of "activity based working" falls too far short of the aspiration. Swathes of unallocated open plan desks provide a noisy, unattractive, sterile and de-personalised environment that is ideally suited to almost none of the activities that make up our working day. Yet that is where most people end up spending the majority of their day. There is no simple answer – and it is likely that many of us will take advantage of our new-found flexibility to spend more time out of the office when this seems the best solution.

The further implication is that the office will need to work harder to justify its place in our working lives, and in the cost structure of our companies.

This means that office design and fitout will have to:

- Focus more explicitly on better meeting the real and varied needs and desires of a wider range of employees
- Recognise that different personalities have different wants and needs, even if doing the same type of work
- Accept that high density, open plan, unallocated desking may have a part to play, but is rarely the optimum environment for any individual or type of work
- Provide a range of environments that truly provide employees with a workplace – or series of workplaces – that positively enhance and support their productivity
- Utilise technology to facilitate workspace personalisation whilst ensuring that employees are fully supported and connected to each other and to the collective intelligence of the organisation
- Accommodate the desire for collective endeavour and collaboration whilst recognising that in knowledge industries, a high proportion of the work is actually best undertaken in a quiet environment protected from noise and interruption

Above all, we should remember Maslow's emphasis on the journey rather than the destination, and the constant need to evolve in search of the optimum. Far from being dead, we are entering one of the most exciting periods ever seen in the evolution of the workplace.

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APPENDIX 1

Measuring productivity

FIGURE 1: CORPORATE PROPERTY DIRECTORS

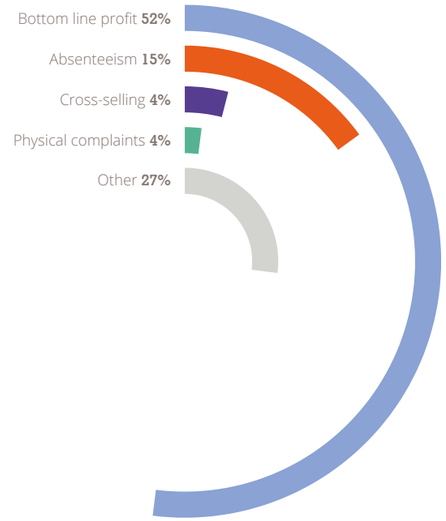
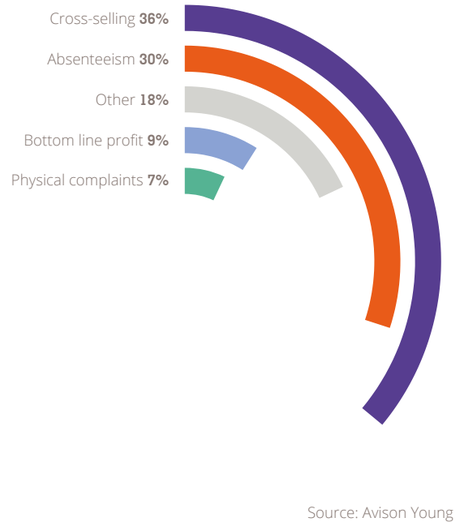


FIGURE 2: GOVERNMENT PROPERTY DIRECTORS



Source: Avison Young

Figures 1 & 2: The best measures of productivity according to businesses

There is no clear agreement on how best to measure service sector productivity at either the corporate or individual level. According to an Avison Young survey of 64 UK corporate property directors, over half believe the best measure of productivity within their individual businesses is bottom line profit, with a further 15% focussing on levels of absenteeism. Other approaches focus on levels of cross selling, performance against specific goals and targets, or satisfaction levels amongst customers or employees. Each of these has its advantages and drawbacks, and none alone capture the entirety of individual or corporate productivity.

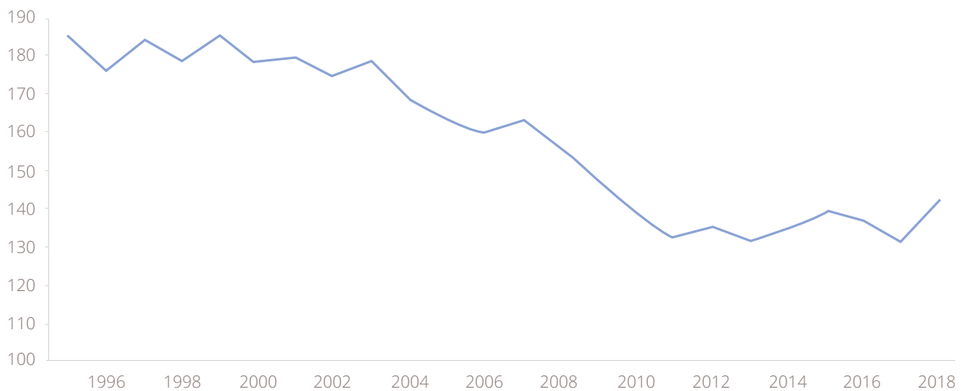
PROFIT MEASURES

- Preferred by corporates
- Objective, easy to measure and generally representative of real rates of productivity
- But only relevant to profit-focussed businesses
- Even there, misses key aspects of business performance eg business development activity or, for example, productivity in new companies during start-up phase
- Penalises capital investment during the period between expenditure and when pay-back emerges (arguably a key factor in current “paradox” of low productivity)
- Difficulty cascading down from corporate to individual level; how do you assess productivity of employees who are not directly revenue generating?

ABSENTEEISM

- Absenteeism can be one measure of productivity, chosen by 15% of respondents in the property director's survey and 30% in the government survey.
- Relatively objectively measures lost time as a proportion of contracted working hours.
- The Bradford Factor is a formula which indicates the absences of specific employees, weighted by length of absence as longer absences are more indicative of true illnesses.
- The measure has one major downside however in that rates of absence imply that an employee is being 100% productive when at work.
- UK absenteeism has fallen since 2003 to a record low of 131.7 million days in 2013, despite UK productivity also declining. Problem of "presenteeism"?

FIGURE 3: NUMBER OF DAYS LOST THROUGH SICKNESS ABSENCE 1995-2018, UK



Source: Avison Young

COLLABORATION AND CROSS-SELLING

- Companies facilitate productivity through collaboration, as shown by multiple studies which show an increase in profits or savings as a result.
- It is possible to measure the potency of internal collaboration through a network approach, examining how actors within the company interact with each other on the individual, team and company-wide level.
- After initially mapping out these channels of internal communications, they can then start to be analysed in terms of their productivity by understanding how much weight they carry towards economic benefits, efficiencies and best practise sharing.
- Strong and weak areas of collaboration can then be identified and tackled with a targeted approach.
- A crucial area of potential productivity within collaboration is the opportunity for cross-selling within the business. This was identified as the most important measure of productivity for government by an Avison Young survey of Government property directors.
- Successful cross-selling delivers more value per client by reducing the initial need for attraction to the company, first contact and on-boarding. Cross-selling therefore saves time and builds client relationships, bringing considerable benefits for productivity.
- Useful for analysing how to drive productivity growth, but difficult to use as an objective measure of level of productivity.

GOALS AND TARGETS

- Useful in sectors where the final outcome may not be direct profit
- Looks at relative and absolute achievement of specific goals and deliverables.
- Can include sticking to agreed timescales, engaging with a target number of customers, or achieving a certain level of knowledge.
- Allows tailored measures of productivity for activities which may be hard to measure, but difficult to ensure comparability between individuals or organisations, or over different time periods.

SATISFACTION LEVELS

- Customer satisfaction can be an effective means of measuring business performance in terms of the service provided and the likelihood of customers becoming regular patrons or recommending the business to others.
- Whilst an extremely useful and important metric for the business, and useful alongside profitability in assessing the quality aspect of service provided, it is difficult to use as a measure of productivity per se.
- Employee Net Promoter Score (eNPS) is an effective approach for understanding the employees' perspectives. These ask how likely the individual is to recommend or 'promote' the company based on various characteristics. For example, an employee may be highly likely to recommend their employer for the benefits they provide, but not for their workplace.

Research has shown a high correlation between overall corporate performance and high overall eNPS scores.[32] Intuitively this makes sense:

- Highly successful companies recognise the need to be profitable AND to provide a high quality of service to clients.
- Their profitability enables them to reward and incentivise good performance.
- They also recognise that their key asset is their employees, so they focus on staff welfare, retention, training and development.
- Employees who feel valued in this way tend to be more "engaged" (committed to and aligned with the aspirations and performance of their company)
- Highly engaged employees are more likely to recommend their company to others, hence achieving a high eNPS.
- Employees in such companies tend to be happier and healthier, with lower rates of turnover and absenteeism. Significant evidence exists to support a connection between satisfaction and happiness at work and overall productivity.

Leading organisations are therefore increasingly utilising surveys to assess different dimensions of employee satisfaction. They also recognise that one of the most reliable, cost-effective and useful metrics of productivity is employee perceptions of their own productivity. Implemented correctly, staff will tell their employers how productive they feel – and they are usually accurate in their assessment.

APPENDIX 2

High level details of surveys

LEESMAN SURVEY

Leesman is the world's leading measure of employee workplace experience. The Leesman Office business intelligence tool captures employee feedback on how effectively their environment supports them and their work. The consequent findings provide organisations with critical insight into how buildings are performing. Performance is then benchmarked against the world's largest statistically robust employee experience database. In March 2020, as an increasing number of workplaces closed in a bid to curtail the spread of COVID-19, questions arose over how employees would continue to do their roles effectively in remote-working environments. In response to the crisis, the Leesman standardised survey now features an additional module, focused on home working environments, as well as a stand-alone Home Working Experience survey to capture how employees have experienced the home environment and how well their set up supports them in their role. The Leesman Home Survey is backed by The Royal Institution of Chartered Surveyors and the International Facility Management Association.

Founded in 2010, Leesman provides quarterly insights into the world of workplace and business intelligence via the Leesman Review, based on a global reach database of over 5,000 workplaces across 90 countries and more than 745,000 office-based respondents internationally and 145,000 home-based respondents.

AVISON YOUNG SURVEY 1

The survey was held as a component of the 13th Property Directors' Forum which took place on Thursday 27th June 2019. The topic was the wellness agenda within the workplace and how this is affected by growing use of technology. We received survey responses from 62 participants. The event was held for corporate property directors from leading occupier businesses in the UK.

AVISON YOUNG SURVEY 2

This survey was completed by the attendees of Avison Young's presentation at the Government Property Forum, held on 4th February 2020. The presentation "Wishing Well" explored the current trends and research, identifying ways to overcome typical challenges and examine the biggest opportunities to embed health and wellbeing into workplace design, operations and culture. We received survey responses from 37

Should you wish to discuss any details within this update please get in touch.

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