



BCFA

REPORT

The future of the office
and office workers



An in depth review of the future of office work

The British Contract Furnishing Association represents a wide range of market sectors within the furnishing industry including: Office, Marine, Education, Healthcare and Hospitality.

Within these markets, our members cover a huge range of products and services including: accessories, art, bathroom fittings, fabric, furniture, lighting, soft furnishings and design services.

The BCFA Market Overview reports are designed to give a summary of key sectors to our members identifying key dynamics and trends which will be of interest. All published sources are referenced accordingly, providing members with valuable industry insights.

The following sources were used in the compilation of the sector overview: commercial real estate websites, academic journals, the Office of National Statistics, Deloitte, KPMG, the OECD, TUC, CIPD, the European Commission, EY, Timewise, the Harvard Business Review, the Economist and interviews with industry experts in psychology, HR law, insurance and property investment.



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I.0 Executive Summary

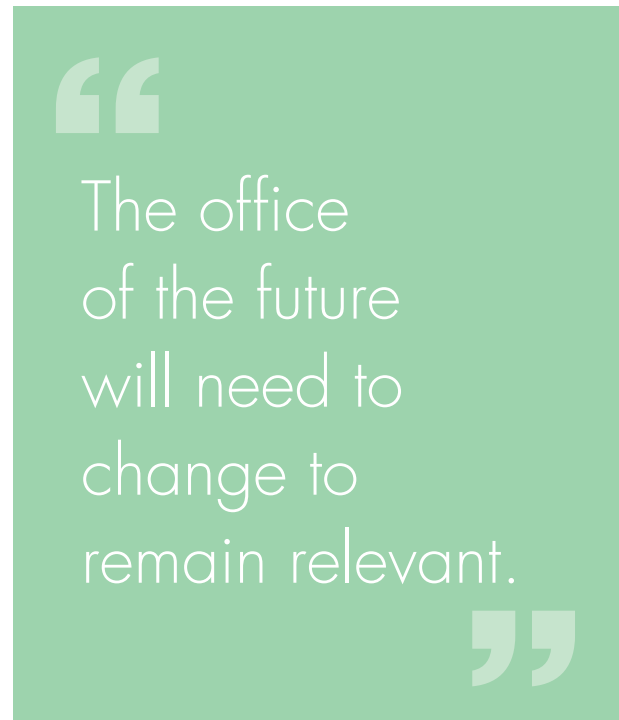
The coronavirus pandemic has forced a large portion of business to move work out of their offices with all but essential employees working from home or placed on the various government job retention schemes.

With populations confined to their own homes, organisations of all types had to change the way they operated or shut down completely. Companies are now starting to consider what a post-COVID-19 workplace might look like.

Before February this year, there were few companies with formal agreements for flexible or homeworking. Many have now learned that remote working can be productive. This has led to predictions of radical changes to the world of work and potentially the end of the office.

Digital disruption has affected many parts of the economy and our daily lives. This has included the increase in tools that are available to support and facilitate homeworking. In this sense we are not witnessing a new trend, but rather COVID-19 has sped up the adoption of these tools accelerating a trend towards flexible working.

This report examines the future of the office given this backdrop, covering a wide range of perspectives to give as complete picture as possible on the future of work and the impact on the traditional office environment. Examining the effects of remote working on productivity, mental and physical wellbeing, organisational culture, work life balance, health and safety, and data security.



There are real constraints on homeworking and employers must look at how much control they need over staff work environments and the choices this creates. Health and safety, insurance, and data security issues must be addressed to create homeworking policies which allow both employers and employees to gain the benefits of flexible working.

Our view is that it is unlikely that people will go back into the office in the same way as they did pre-pandemic. However, the office cannot be replaced for building team culture, team cohesion, collaboration, and knowledge sharing. These elements of work life rely on close contact between teams. In our opinion the future of work will see a combination of work in the office and remote working, where businesses find flexible policies based on their own needs.

2.0 Introduction

The current COVID-19 pandemic has impacted almost every part of daily life, and many of the changes we have seen will be permanent. In this report we outline the impact on the office and the role it plays in work life.

Since the middle of March articles, opinion pieces and reports have been released that weigh in on this debate. However, much of this commentary either rests on speculation, narrowly interpreted data, or limited examinations of space and its impact on work. This report examines the future of the office from as many angles as possible and includes secondary research on psychology, economics, law, and technology, as well as interviews with experts in psychology, HR law, insurance, commercial real estate investment, and other business leaders to present a picture of the future of the office.

This report will show that homeworking was already part of the digital disruption that was changing almost every other part of business, and that what we are seeing is not a new trend, but rather an acceleration of an existing trend.

This report is organised into three sections covering Engagement, Balance, and Choice and Control. In the Engagement section we focus on how the office is a place for building team culture, team cohesion, and trust between employees. Ultimately, to have staff who are engaged and productive, these elements are key, and the office plays a central role in their development. The second section will focus on Balance, examining how flexible working can be used to help improve employee wellbeing and improve work-life balance. The third section looks at Choice and Control, examining some of the constraints on remote working, how health and safety, cybersecurity, and technological issues create challenges and choice regarding when and how people work, both for employers and employees alike. Lastly, we provide a framework for thinking about how the office will be used by businesses going forward. This is a spectrum ranging from being unable to control the novel coronavirus and people continuing to work from home, to the virus being under control and very few structural changes being made.



3.0 Background

Remote working has been a concept for over 50 years and was first introduced during the Oil Crisis in 1973. Since then companies have incorporated it into their operating models over the decades, but only to a limited extent.

The main barriers to remote working have been employee and employer perceptions rather than hard constraints, such as technology. Employees had generally negative views, believing that it would stop them from progressing their career (17%), feeling that they cannot work flexibly because their colleagues do not (17%), believing that their work place is not supportive of flexible working (24%), or lastly believing their job is cannot be done flexibly (39%).¹

At the time of writing, guidance around getting people back into the office is aligned more closely once again among the four nations, urging people to work from home where possible. With new routines being set it seems unlikely we will go back to the old routines of 9-5,

Monday to Friday, particularly as it has become clear that remote working is feasible and provides some strong benefits. This is reshaping the fundamentals of how and where business is done. Many businesses are looking at their operating models and how they may reduce costs in the current economic climate. There is now much discussion about office space, how it will be utilised, and if it will be used to the same extent. There are already reports that companies, such as Capita, NatWest, Lloyds, and JP Morgan, are looking at their real estate footprints, thinking about new locations, and what role the office plays in their business. This report will provide insight for the BCFA and its members, as to what the impact of COVID-19 is likely to be, and what the potential opportunities are.

3.1 Acceleration of an existing trend

Pre the pandemic **29%** of managers said they **did not trust** their employees to work efficiently remotely.²

Before the pandemic, only **15%** of jobs advertised flexible working, while **90%** of employees wanted flexible working arrangements.

36.4% of the UK workforce who usually worked in the office, were **working from home** in August 2020.



The change to homeworking during the pandemic is not a new trend, or reversal of an old trend. Digital disruption has been affecting and changing almost every part of the economy and our daily lives. One clear example is the move to online sales. In December 2008 online sales made up 4.6% of total sales in the UK, by December 2019 they were 15.7%.³ Every passing year online sales are becoming more important as people's behaviour shifts to make use of the available technology. The same is true of homeworking and flexible working, albeit the shift has been at a slower pace. Headline statistics do not capture the change particularly well. For example, in 1999, 3% of the workforce worked from home regularly, this had only increased to 5.1% by 2019.⁴

Looking at the number of people working flexibly shows a similarly slow increase. In 2005, 23% of the full-time UK workforce had a flexible working agreement, while in 2017 this had only increased to 27% (this includes part-time as a form of flexible working). Only the take up of flexitime, compressed working weeks, reducing hours (for a limited time) had increased over the past two decades.⁵ Informal agreements and occasionally working from home, which do not show up in the ONS data collected, appear to be responsible for the change towards homeworking and flexible working. In 2013 a CIPD report surveyed people and found 53% of all employees have informal agreements to work flexibly, 89% said they had informal agreements to work from home occasionally and 12.4% of people surveyed by the ONS in December 2019 said they worked from home in the previous week.^{6,7}

There were however examples of high-profile companies that could not make remote working work for them, and those that refused to adopt these policies. This did not help to change perceptions. Famously, in 2013, IBM decided to bring most of its remote workers back to the office, after proudly stating in 2009 that

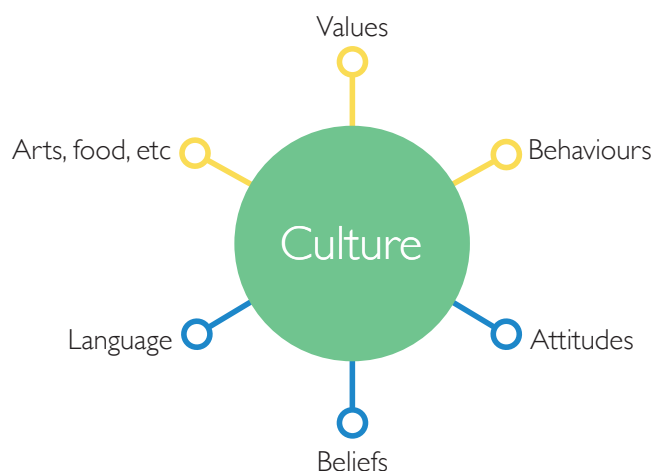
40% of their workforce did not have an office! In 2013, Yahoo CEO Marissa Mayer banned her employees from homeworking. Marissa Mayer was quite open that, in her opinion, this was resulting in reduced innovation and collaboration, as well as staff taking advantage of the situation. IBM was less frank; it was rumoured that poor innovation and collaboration were the reasons behind pulling staff back into the office, but this was not officially confirmed. Facebook had the world's largest open-office workspace, a single space spanning eight acres, where 2800 employees worked, including CEO Mark Zuckerberg, with no plans to have staff working remotely full-time.⁸ If these companies, which sold products and services based on communication technologies gave up on remote working, why would any other business look to use it widely?

Before the crisis there seemed to be a supply and demand issue with flexible working policies, where only 15% of jobs advertised offered remote working, whilst 90% of workers were ideally seeking flexible working arrangements.⁹ The scale of the shock from the pandemic has resulted in a huge shift in homeworking with 46.6% of the UK workforce working from home in April 2020. Whilst some people have returned to the office to some extent, by the end of August, 36.4% of the workforce that usually worked in the office were still working remotely.¹⁰

The pandemic has shown employees can work from home effectively and workplaces can put policies in place to support homeworking. What we are seeing is that digital disruption had already made remote working possible, the only barriers were people's perceptions. Remote working was going to become much more prevalent over the next decade, the pandemic has accelerated this trend rather dramatically.

3.2 Culture

The longer we have to live with COVID-19 the deeper and more entrenched the cultural change will be. As company culture incorporates homeworking more, the more difficult it will be to go back to working in the office full-time or our previous working patterns. Some changes are already permanent. People's beliefs around homeworking have been altered, and, for example, few people will go back to believing homeworking is impossible. Business culture can be broken down into six key elements:



3.2.1 Arts, food, and music

When everyone worked together in the office, they would go to get food, eat, have tea breaks, and talk about things happening outside of work. This provided a way for employees to have more informal connections, where work was not always top of the mind building trust, communication and empathy. When people work from home, these more informal connections are not built or maintained, and team culture can start to shift.

3.2.2 Values

Values have been deeply affected as a response to COVID-19. For example, staff wellbeing and public health became a core value that businesses communicated in the acute phase of the lockdown. People's view of work and how to prioritise it has changed as well. Spending time with family and being part of communities are examples of values that people are increasingly incorporating into their lives.

3.2.3 Behaviours

COVID-19 has forced people and businesses to change their behaviours overnight. The most obvious is that we are not going into the office anymore or commuting to work on a daily or regular basis. These behaviours have now radically changed and new routines are being set. These changes in behaviour are being replicated across business, the rise in the purchase of informal clothing at the cost of smarter work wear is a good example.

3.2.4 Language

The way people communicate at work sets tone, influences the way people feel. Businesses can control the language used in the workplace and this helps create and maintain norms. Language is generally quite difficult to change because it becomes ingrained. However, working from home has meant managers have less control, and people are creating and using different language, particularly as scheduled Zoom meetings, emails, texts and WhatsApp replace more face-to-face communication and telephone conversations.

3.2.5 Attitudes

Peoples' and businesses' attitudes are expressions of their internal beliefs. Before the pandemic attitudes towards remote working were often negative, creating a barrier to a real shift towards more flexible working. Workers were used to attending the office, it was part of daily life. These attitudes are being forced to change as workers learn new behaviours and learn to be productive in a new work style.

3.2.6 Beliefs

Lastly, beliefs are deep-rooted and usually difficult to change. They are the product of repeated actions. People used to believe they had to be in the office regularly, their jobs could not be done remotely, or their career could not progress while they were working from home. Managers did not believe their teams could work efficiently by themselves. The monumental disruption caused by COVID-19 has impacted these beliefs as many of them have been proven incorrect. Having been forced to work from home, now employees and employers are starting to believe they can perform their tasks remotely.

3.3 Economy and commercial real estate market

Key Findings:

The economy is recovering, but businesses are taking a “wait and see” approach as it is hard to make plans when further local lockdowns are a concern.

Investment in commercial real estate is recovering but remains far below pre-pandemic levels.

In the first half of the year
office space take up was
down 35% YOY



Approximately 2m sq. ft.
of office space deals have
been put on hold
or cancelled
since March.



3.3 Economy and commercial real estate market continued...

As the scale and depth of the economic crisis becomes clearer, many businesses are facing new realities, while also dealing with continued uncertainty as the health crisis continues. Economic forecasts from May and June are already out of date, and the underlying assumptions seem to move daily, for example, current forecasts of Q4 GDP growth range from 1.4% to 6% among city investors.¹¹ The economic recovery appears to be shaky and under constant threat from local lockdowns. As businesses try to get operations back to normal, local and national changes in the COVID-19 guidance can quickly derail plans.

Retail sales are recovering across the UK and in July were just 3% higher than in February of this year, but this recovery has been uneven and largely driven by food-store sales and online sales.¹² The UK's manufacturing purchasing manager's index (PMI) rose to 55.2 in August, pointing to expansion, and there has been a sharp rise in orders from Europe, the US and Asia. The UK's services PMI stood at 58.8 in July following the reopening of non-essential businesses.¹³

The Government's Job Retention Scheme (JRS) has helped keep unemployment from exploding and has also put a floor under consumption. Here too though, there are concerns for the next few months as the JRS unwinds and businesses are forced to make decisions over bringing staff back or making redundancies. The Government's other schemes to provide support for the economy have received mixed responses but have undoubtedly provided a much-needed lifeline for the private sector during the strictest periods of lockdown.

This uncertainty extends to the commercial real estate market. According to Colliers, investment in commercial real estate was seeing a slight recovery, but this came after April and May both saw less than £1bn in transactions. In July transactions totalled £2bn, which is still far below the UK's five-year average for July of £5.1bn. The office and alternative/mixed-use segments were most sought after, and capital from Asia accounted for half of all transaction value. Roughly two thirds of transaction value was recorded in London. As of July, Colliers had tracked just under 500,000 sq. ft. of deals

that had been cancelled due to COVID-19, while 1.5m sq. ft. of named requirements had been put on hold. Colliers expects these to be reactivated in 2021.¹⁴ Office space take up in the first half of 2020 was down 35% compared to 2019, however, Colliers views the current low vacancy rate as a positive sign. Our view is that as leases come up for renewal, many businesses will not re-sign, and vacancy rates may increase over the short and medium term.

Colliers reported that interest in prime space is higher than the transactional values suggest, as upwards of £1.5bn in agreed deals waiting to be completed were held up by COVID-19 related obstacles. Colliers predicts that offices in the city will perform better than other office markets in the UK, but total returns in the city will decline by 1.9%. They expect yields to stabilise in 2021 and to return to growth, while they also expect a return to rental growth in 2022.¹⁵

Lastly, Savills anticipates businesses will start to seek "turnover" based leases as a result of the pandemic. In the UK, 7% of total leases were already turnover based and the concept is common across the outlet centre model. They suggest that businesses may start to move to hybrid rent models with a base rate, and a turnover top-up. This would provide some flexibility for renters, but also guarantee a level of income security for investors.¹⁶

It is difficult to give accurate long-term predictions in the current climate, for both the economy as a whole and office real estate investment, much of what happens over the medium to long term will be decided by how the following questions are answered: What steps will the Government take to support the economy? How well will an increase in coronavirus cases be managed? How will the UK's trading partners manage an increase in coronavirus cases? How will the key Brexit tensions be resolved?

Demand for office space is intrinsically linked to the economy, however, we have highlighted Engagement, Balance, and Choice and Control as overarching themes that will influence the future of the office.

4.0 Engagement – the impact of where you work

Key Findings:

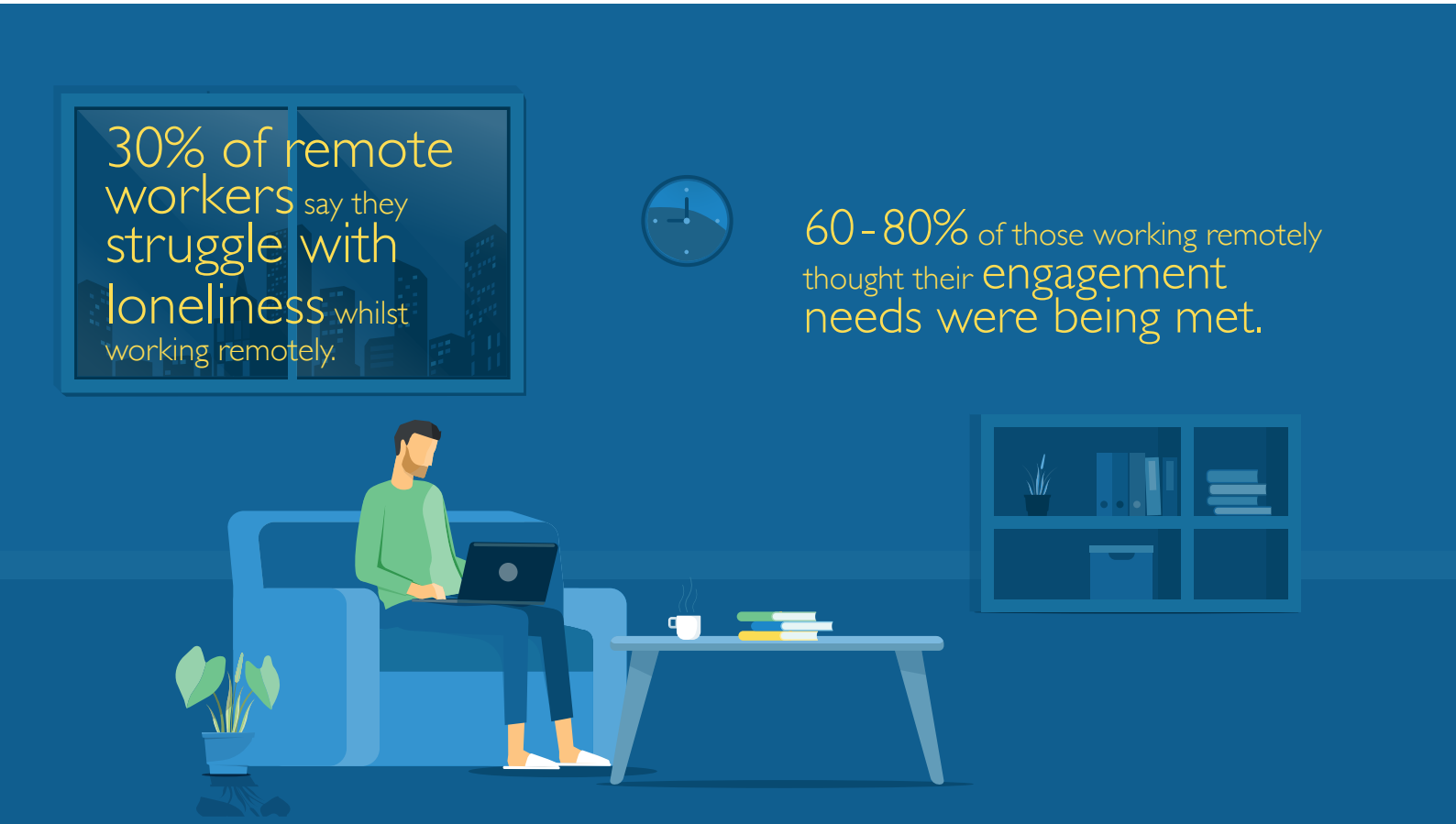
Employees are more satisfied working from home if they have dedicated desk and working space.

Building trust, team culture, and team cohesion is best done through multiple face-to-face interactions which digital technologies cannot currently replicate.

Employees can be just as productive working remotely or working from the office for individual task-based work, but collaboration and knowledge sharing are best done through face-to-face interactions.

Isolation is a big driver of disengagement among employees.

Working fully remotely can adversely impact mental health.



30% of remote workers say they struggle with loneliness whilst working remotely.



60-80% of those working remotely thought their engagement needs were being met.

Employee engagement is based on trust, integrity, communication between employees, and communication between an organisation and its employees. High engagement increases business success, contributing to organisational and individual performance, productivity, and wellbeing. Remote and home working has been a rising trend for organisations in recent years. However, for the first time, many are now adjusting to an enforced company-wide home working policy as part of a global campaign to combat the coronavirus outbreak. How will this effect engagement in the future?

4.1 Team culture

Culture is defined as the way in which members of an organisation relate to each other, to their work, and to external factors that distinguish them from other organisations. The culture of a business is defined by several characteristics: organisational structures, management practices, employee performance management, company policies, employee interactions, the company's mission, vision and values, and workplace environment. Company culture has meaningful effects on employee retention, satisfaction, and productivity. When employees identify with a company's culture, they are likely to be more engaged in their work.

Generally, workplace culture does not usually shift rapidly. Rather, it adjusts slowly over a long period of time in response to an accumulation of multiple small changes. The pandemic has forced companies to adapt quickly to the shift to remote working and adapt their culture to reflect remote working practices in order maintain business continuity. As the workforce continues to work remotely for the foreseeable future, many of the factors that comprise culture are not within the control of organisations to the same degree as they previously have been.

Research has found that remote work often impedes organisations from creating and solidifying company culture, as it is fostered in a large part by employees engaging and collaborating with each other. For many employees, long-term remote work may be preferred as a result of decreased commuting times, however this has an impact on the opportunities for critical relationship building at work. Research from Gallup shows that employees who do not work in the same location as managers are; 10% less likely to feel cared about at work, 10% less likely to feel they are recognised

for their contributions, and 5% less likely to feel their opinions count.¹⁷ For employees with a preference for working in an office, the disengaging effects of remote work can result in 17% lower productivity and 24% higher staff turnover. According to Gallup, 60% of all employees felt that they were unable to identify their company's cultural values. Employees who work virtually are even more disconnected from core cultural components. It is estimated that remote employees are 7% less likely to see their efforts being connected to the mission of the company.

However, the previous Gallup survey may be a result of in-built belief systems. A study from Quartz and Qualtrics found 37% of survey respondents said their workplace culture had improved since the start of the Coronavirus pandemic, as opposed to 15% who said it had deteriorated.¹⁸ 70% of respondents who said their company had a good culture before the crisis were more likely to say that it had improved. Those who said their culture was already bad were more likely to say it had deteriorated. The split suggests that having a robust culture sees companies through the bad times, while adversity further destabilises unstable foundations.

A working paper from the National Bureau of Economic Research found that although employees are attending more meetings, the average meeting length is shorter.¹⁹ Most companies report having increased communication, meaning that employees might, in some ways, be feeling more connected. Technology has acted as both a driver and a facilitator making remote working a natural extension of the office. Digital workspaces provide company employees with digital collaboration and communication tools, a digital space to find and share information and knowledge, and access to business applications.

4.2 Team cohesion and collaboration

The academic literature is clear, many business attitudes and practices have been counter-productive, harming overall productivity. Software systems that track how employees spend their time, and other forms of overbearing supervision do not help, potentially reducing trust and engagement. These attitudes towards employees were hindering the growth of flexible working prior to the pandemic. During the pandemic many managers have been surprised at how well teams are working.

Trust must be built between employees if they are to effectively work in teams. A key concern for managing remote teams is how trust and culture can be built when staff are not physically working together, as building relationships and getting to know people is easier through close contact and informal connections.

Studies find that team culture is fostered, in large part, by employees working together, engaging in team building activities, and in face-to-face meetings. They also show teams that have high levels of geographic, operational, and cultural differences have lower levels of trust, innovation, satisfaction, and performance than teams with greater connections. The interpersonal and cultural gaps make it difficult for virtual teams to develop empathy among team members, share knowledge, or exhibit other collaborative behaviours.

When company culture is not well established among remote workers, they can feel isolated, unhappy, and overlooked. Sense of belonging, common purpose and shared identity gets lost and this can result in poorer performance. This lack of ability to create high levels of trust if employers work remotely creates issues around collaboration and knowledge sharing.

During the lockdown, employers have successfully onboarded staff and got them working as part of a team. Much of the process can be done virtually, through videoconferencing and virtual training platforms. The main issue is getting new employees to be a part of the social culture of a company, and for this there seems to be no replacement for a place for employees to connect and work together.

There is some evidence that remote employees work harder to solidify their relationships with each other,

and that different communication patterns utilising digital and remote tools have a positive effect on team cohesion. Some results from studies found working partially in the office and partially at home was the most effective way to build team cohesion as teams became better at communicating in different ways.

One of the key themes we have seen in our research and interviews is that a role of the office of the future is to act as a hub where teams can get together to build team culture, cohesion, collaborate, and integrate new team members. Staff would then be able to choose whether to complete individual tasks remotely, or wherever they feel more comfortable and productive.

4.3 Productivity

Employee engagement and productivity go hand in hand. The majority of remote workers believe they are more productive when working outside of the office and do not have to face common distractions like background noise, chatting colleagues, and general interruptions. For stand-alone tasks that do not require a great deal of coordination with colleagues, working remotely appears to boost productivity. A recent study by the International Workplace Group (IWG) saw 85% of businesses confirm productivity increased as a result of having greater flexibility, with 63% reporting a minimum 21% improvement in productivity.²⁰ In line with these findings, a study carried out by the University of Birmingham Business School showed greater levels of autonomy such as the ability to manage tasks and location had a positive effect on employee wellbeing.²¹ The positive outcomes associated with the ability to work remotely are the result of several factors. Staff morale can be boosted when employees have greater control of their working arrangements and feel trusted to deliver their responsibilities without constant oversight from their managers, which can lead to employees having a stronger commitment to the success of the business. Autonomy can help employees to be more productive, with remote work providing individuals the opportunity to work during their most productive hours and the headspace to think about and focus on a piece of work, away from distractions.

Further to this, research from Gallup shows that when employees are engaged their performance increases. Gallup describes engaged employees as those who feel

“involved in, enthusiastic about, and committed to their work and workplace.” Highly engaged workplaces have 41% lower absenteeism, 40% fewer quality defects in work, and 21% higher profitability.²² Gallup found that engagement among staff working flexibly was higher than for those who spent all their time in the office, or all their time working remotely. For employees working in the office all the time, or remotely all the time, 30% were engaged. Whereas for flexible workers this ranged from 32% for those who spent 80-99% of their time working remotely, to 41% of those who spent 60-80% of their time working remotely.

Lastly, many determining factors of enjoying remote working and high productivity correlate with age, though age is not a determining factor. Leesman, a workforce consultancy, found that satisfaction with homeworking was highest among those who had dedicated office and desk space.²³ Many employees, particularly young employees, were working at kitchen tables, on couches, or other spots that are far from ideal places to work, as they do not have space in their houses or cannot afford office furniture. Having family at home, rather than living alone or with flatmates, means that extra time spent at home can be more meaningful and that people are less lonely. Being able to take on the responsibility and having the skills, to make homeworking effective is something that often takes time to develop and people starting their career may struggle with aspects of this.

The evidence strongly shows that having only one place of work, whether that is homeworking or in an office, is not conducive to better employee productivity and a better solution is to allow for choice in the working environment, where the employee can choose based on their needs where and how they work.

4.4 Communication

One of the biggest challenges facing remote-working companies is the ability to effectively share accurate, real-time information among colleagues. The State of Remote Work Report 2020 by Buffer found 20% of survey respondents identified collaboration and communication as their biggest struggle with remote working.²⁴ This has been attributed to remote workers missing out on important information both from formal and informal communication channels.

When employees work mostly or exclusively from home, they are likely only to interact with colleagues via email or formal points of connections such as during video meetings or conference calls. The lack of more informal communication points can result in barriers to building working relationships and the more informal communication flows that occur in a traditional work environment. This is important for a number of reasons including; interaction with co-workers facilitates expectation setting and enables employees to grasp the standards of performance and communication required. Social interaction is strongly correlated with workplace engagement and satisfaction.

On the other hand, several studies have found remote work can improve the quality of communicating, as workers have more space to incubate on questions, think carefully and respond in the most effective way. Collaboration and communication, as a result, become more measured, reasoned, and thoughtful. Short, intermittent bursts of communication have been identified as the best form of this, with research from Carnegie Mellon University finding those who communicated in short bursts, followed by longer periods of silence, were more productive than teams who communicated more frequently but less intensely²⁵. Keeping interactions short allows employees to remain in the loop, swap ideas and collaborate, while leaving room to achieve their own personal work goals. This supports the theory that a mixed work environment increases engagement over solely working in an office at a static desk or home working environment. Allowing employees to choose when they need to be in the office to collaborate and communicate more efficiently and the freedom to work from home or another location when they need space to deliberate improves communication and efficiency.

4.5 Fatigue

A recent survey from the Society of Human Resources Management found 35% of employees reported feeling tired or often having little energy, with a further 32% reporting they felt this way sometimes.²⁶ One reason highlighted for this was overwork. Research by NordVPN claimed that UK employees have been adding around two hours to each workday, equating to around an extra week of work per month.²⁷ Comparatively, staff in countries including France, Spain and Canada

had returned to pre-pandemic work schedules, while those in the US worked around three hours extra per day. A survey of 500 employees by the remote working platform LogMeIn, found 46% of employees feel under pressure to demonstrate they are truly working from home – including making sure they are 'more responsive' on email.²⁸ Because the success of remote teams is often measured by results, employees are often tempted or feel pressured to overwork and inflate their output, resulting in unpaid hours, lack of sleep, poor engagement, and mental burnout. Burnout is characterised by 'high emotional exhaustion' (feeling drained by interpersonal contact), high depersonalisation (feeling alienated from people), and a sense of low personal accomplishment (a lack of work-related fulfilment or esteem). Employees who are predominantly home-based tend to report higher levels of work-related burnout. At the same time those based at a static personal desk in the office also report higher levels of burnout than flexible workers.

Whilst there are many work-related factors that contribute to employees feeling fatigued, the research highlights the impact solely working remotely or solely in the office has on some employees.

4.6 Isolation

Despite its advantages, remote work has the potential to isolate employees, which can have a significant impact on engagement. It is much easier for remote workers to become disengaged due to the isolated nature of working from home. By its very nature, a remote workforce is physically less connected to a company's central hub of activity, which means people may miss out on communal gatherings like team lunches, celebrating colleagues' birthdays, office conversations, and other informal moments that make a group of individuals feel like a team. Lack of face-to-face supervision may leave employees feeling unsupported and less confident or newer employees may struggle with their tasks due to lack of information or guidance. For other employees without close supervision productivity may drop-off, although this is more often an unfounded fear of managers rather than an actual productivity constraint.

Isolation is a big challenge for remote workers and can hugely affect morale and employee mental health. If left unchecked it may lead to disengagement with both the job at hand and the wider company, resulting

in increased staff turnover. Research also shows lonely people are more likely to withdraw from engaging with others and less likely to seek emotional support, which in turn contributes and amplifies feelings of isolation.

In the State of Remote Work report published by Buffer, 20% of remote workers stated that loneliness is their biggest struggle.²⁹ Studies have highlighted a risk among employees who work remotely where mental health issues could develop more frequently as they are separated from communication channels and support mechanisms that are provided to on-site staff. This results in feelings of disconnect which ultimately leads to disengagement. A report published by FinderUK found that 30% of remote workers say they struggle with loneliness when working remotely.³⁰ During lockdown, 5% of British people identified as being 'chronically lonely', amounting to approximately 2.6 million people, with those living alone being at the most at risk. According to Ward and Shabha (2001), employees who work remotely miss out on every-day office life and suffer from a lack of face-to-face communication, limited professional support and feelings of isolation.³¹ Moreover, remote workers may find it difficult to internalise workplace attitudes, values, and behaviour that are informally absorbed by office-based employees.



5.0 Creating Balance at work

Key Findings:

A flexible working model best facilitates balance, reduces stress and improves employee wellbeing more than solely working from either the home or office.

The main sources of stress for remote workers are working to a deadline and general work overload.

Remote working creates challenges for staff to switch off, and homelife and work can blend together.

41% of remote employees reported higher levels of stress, compared with 25% of their counterparts who work in an office.



36% of staff based in the office said they kept worrying about work after hours, whereas 44% of remote workers kept worrying about work.

Only 15% of employees want to work from home full-time.

Balancing work and life, similarly to productivity and workers' health, can be viewed as both a potential benefit and potential constraint of working from home. Learning how to navigate this new reality and balance work and life boundaries long-term is at the forefront of everyone's mind. We are seeing a natural array of reactions: fear, uncertainty, anger, a sense of being overwhelmed, frustration, anxiety, and more.

A survey of over a thousand office workers and employees, commissioned by the UK's largest office marketplace platform, HubbleHQ, found a vast majority were keen for balance, with many seeking to split their time between working in the office and remotely. The statistics revealed only 15% of employees would want to work remotely every day and nearly three quarters (71%) felt their company should still have an office³². The findings showed the main reasons for this centred around team culture, collaboration, meetings, and team socials. 40% still view the office as a key place for regular desk work. For key decision makers looking at decreasing their office footprint, the survey indicated employees believe the office space should be prioritised for collaboration, inspiration, and social interaction. In addition, most employees (84%) would want to meet with their direct team in person on a regular basis, with half stating they would wish to connect as a team once or twice a week. Even for those companies that prefer a traditional office set-up, the flexibility of a remote option will continue to be an important factor in attracting and retaining talent in the future.

5.1 Anxiety and Stress

When working from home, anxiety can take on many forms, such as the perceived pressure to be busy all the time. Some may feel the need to find work, actively working whenever an opportunity presents itself, increasing the risk of burnout. The boundary between work and home life blurs for employees working from home potentially resulting in increased levels of stress. Working from home requires time management, IT troubleshooting, higher levels of organisation in less convenient settings etc. In a qualitative study of UK homeworkers, the main sources of work-related stress identified were 'working to a deadline or tight timescale' and 'general work overload'. While neither of these are specific to remote working, remote workers tend to

put in longer hours of work and may expend greater intensive effort on the job, which may lend themselves to work related stress in a way not experienced by office-based staff. A 2017 report by the European Foundation for the Improvement of Living and Working Conditions suggests 41% of remote employees reported higher levels of stress, compared with 25% of their counterparts who work in an office.³³

However, research also indicates that for some people, having the flexibility to work from home has the potential to reduce feelings of stress and anxiety. For these people remote working is associated with significantly lower levels of work-related stress than they experienced in the office environment.³⁴ This correlation appears to strengthen as time spent remote working increases. Remote workers who work at least three days a week at home report less stress from frequent meetings and interruptions by colleagues and perceive less exposure to office politics.³⁵ Further research has found remote workers encounter fewer job stressors, such as role conflict and ambiguity, than office-based staff, and that their resultant lower levels of work related stress are predictive of increased job satisfaction and commitment to the organisation.³⁶

5.2 Work-life Balance

Remote working poses genuine challenges, including the ability for employees to strike a work-life balance. The transition from home to work is not always easy. It is argued this is more difficult where the borders between home and work are intentionally blurred as is the case for remote workers. The effect is that work pressures spill-over into non-work life as reflected in the inability to 'switch off' and the difficulties encountered in unwinding at the end of the workday. These are all significantly higher among remote workers. For



example, around a third (36%) of employees based in the office kept worrying about problems pertaining to work outside of working hours, while among remote workers the proportion facing these difficulties was eight percentage points higher at 42%. These results underline the downside of remote working with negative work spill-over significantly higher for remote workers.³⁷ This suggests the effects of remote working may be negative for work-life balance, while beneficial for workers' attachment to the organisation, enthusiasm for the job and job satisfaction.

However, being provided with the flexibility to work remotely can be beneficial for the mental health of employees; reducing work and commute related stress, help work-life balance and have a positive impact on the quality of life overall. The daily commute to and from work, especially if lengthy, can have a detrimental effect on some employees' mental wellbeing and consequently on their productivity. The Royal Society for Public Health found 55% of people felt their stress levels increasing as a result of commuting.³⁸ Employers are increasingly recognising the impact of commuting, with over half of the business leaders interviewed raising the benefits of reducing commuting burden. In addition to this, 42% of IoD members said reducing the commuting burden for their employees was a key driver behind their decision to facilitate flexible working.³⁹ Many recognise the time spent travelling to and from work could instead be more valuably spent working or engaging in activities that have a positive impact on wellbeing, such as physical activity, spending time with family or fulfilling care responsibilities. Durham University found that flexible working

arrangements that 'increase worker control and choice' had a positive effect on several health outcomes, such as sleep quality, tiredness and alertness, blood pressure, and mental health.⁴⁰

Remote working is not appropriate for everyone. According to Timsal and Awais (2016) remote working may not suit every employee's needs, as this form of working requires high levels of concentration, dedication, self-motivation, and control.⁴¹ James (2016) also concludes working from home involves many challenges, with the biggest challenge being that it can be extremely hard to retain the motivation to work as the ability to remain self-disciplined and self-driven to complete work tasks decreases when working remotely with little support from work colleagues or management.⁴²

These concerns arguably underline the view that flexibility can be best served by a hybrid approach, rather than all-out homeworking strategy. Nowadays, flexible working hours are becoming important to workplaces. Many organisations offer flexible working hours to employees due to the benefits flexibility gives to both employee and employer, with flexible work facilitating work-life balance, reducing stress, and increasing employee wellbeing. Remote working should not be seen as an easy option to address issues like stress and feelings of poor work-life balance. Instead, employers must look at whether the individual, not just the role, is suited to remote working, taking into consideration factors such as self-discipline, the ability to separate work from home life, and resilience.

6.0 Choice and Control

Key Findings:

Employee engagement and performance increase when they have personal choice and control over how, where and when they work.

The current pandemic is resulting in people reassessing not only how and where they work but also where they live.

As employers move to offer more choice in how and where people work they will need to consider how they control key issues such as health and safety, cybersecurity and technology support.

37% of home workers report Wi-Fi ISSUES are impacting their ability to work.



35% have issues with video conferencing software



and 38% have issues with their VPN.



The post COVID-19 world has broken the barriers to flexible working, creating choice for those that wish to adopt it. Before, work was a place as well as an activity, however, where and when it is completed is now largely up to employers and employees to find something that works for them. This choice has been facilitated by digital communication technologies, and the realisation by both employers and employees that many jobs can be done remotely.

The crisis is also forcing businesses to make decisions under time pressure. As economic pressures are building up, and while the opportunity to reshape large parts of a business exist, they are often balanced against short-term decisions over cash flow and expenses. There are also structural changes happening within the economy which are forcing businesses in certain directions.

For businesses the pandemic has meant large parts of their operations have been moved out of the office and into people's homes. Businesses now have less visibility over their employees, their assets, their employee's workspaces, and how employees are managing both data protection and health and safety.

The office provides control for employers over the environment their staff are working in, and they can easily address most health and safety, or technological issues that arise. Moving to a flexible working or remote working policy will mean that employers will have to trust their employees to address health and safety concerns. Employees working on personal networks are more vulnerable to cyber-attacks, while the opportunity to have calls listened to, or to leave important documents in unsecure locations present challenges for GDPR compliance. Technological issues can derail productivity, particularly hardware issues. Insurance policies were geared towards staff being in the office a majority of the time, and now employers will need to re-examine existing policies.

6.1 Health and safety

COVID-19 has brought aspects of health and safety law, and the obligations of employers towards their employees, to the forefront, both in terms of what offices will look like and the adoption of homeworking. The employer has a duty to apply a safe system of work wherever the employee is based, this can be difficult to

achieve in an employee's house. In the office, employers can administer DSE workstation assessments, ensure the correct equipment is available for staff to use, and train staff to use equipment correctly. At the start of the lockdown, many businesses that did not have remote working policies in place had to catch up with best practice and then find ways to implement them.

To start with, employers must make sure they have home working procedures and workstation assessments in place for the new working environment. While this is difficult to do remotely, best practice is to provide equipment to allow the employee to replicate the office to look after health, safety and wellbeing. Whether the obligations around PAT testing have changed is unclear at this point, however it seems likely any equipment provided by the company needs to be PAT tested each year. The last major uncertainty here is around fire risk and at this point there is no specific guidance. To aid with the workstation assessment, employers should create risk assessments and policies for employees to follow and complete. Employers aiming at the bare minimum in terms of policies and procedures may encounter future issues in attracting and retaining talent as well as potential future liabilities.

Another new health and safety concern for employers is that they need to think about how staff are arriving at the workplace. There has been some speculation that Section 44 of the 1996 Employment Rights Act could now include the employee's commute. Section 44 protects employees from suffering and detriment as a result of acting, or failing to act, on a number health and safety related issues. Before the pandemic Section 44 did not extend to cover the commute, however, the speculation revolves around whether employees can refuse to commute to work on public transport if they feel they are being put in danger in the context of COVID-19. Employers will need to take notice of up to date public health advice and work with employees to discuss arriving at different times or other necessary

measures, but at this point no case law exists to suggest Section 44 would extend to cover the commute and COVID-19.

In the short-term employers will have to think about managing COVID-19 and the impact this will have on how they utilise their office space. The current advice, from the UK government, is to implement two metre social distancing, and where not possible at least one metre. This has meant desks facing each other or in close proximity to others have been moved, barriers and screens have been installed, and one-way systems and handwashing/sanitising stations have been put in. All of which have drastically changed office layouts and capacity.

A feature of most offices before the crisis was the prevalence of hotdesking, where staff are not allocated a desk, but sit where there are places available. The UK Government is currently recommending against hotdesking, because it increases the amount of movement in an office and the number high-touch areas, making spreading the virus easier. The current government guidelines state that offices should be “avoiding use of hot desks and spaces and, where not possible, for example call centres or training facilities, cleaning workstations between different occupants including shared equipment.”⁴³

Over the medium to long-term it is unclear whether hot desking will be as prevalent as before the crisis. It is easy to see a future in which hot desking does not return, as people continue to be concerned about COVID-19, and general hygiene, and companies perceive the risks of infection or the costs of cleaning to be too great. On the other hand, if flexible working and homeworking become the norm, then allocating a desk to a person who is only in the office 60% of the time, will result in a low utilisation rate of office space.

Before the office was designed to be a place where employees would come into contact to foster team culture, knowledge sharing and collaboration. Now the idea of people coming into close contact with one another directly contradicts public health advice. Over the short to medium-term this will change office layouts but eventually, given the importance of personal contact for building engagement and maintaining relationships they seem unsustainable and we will see collaborative space design that supports both work and the public health circumstances.

6.2 Insurance

Employers will also have to think about changes to business insurance policies. Having employees working from home will require vigilance, while trusting their employee to help ensure compliance with regulation. To make homeworking work from an insurance point of view, employers will need buy in from their employees. This will require trust and cooperation between employer and employee.

Businesses will need to inform their insurers of changes made around homeworking. Declaring all assets that are being used in homes, letting insurers know that staff are working from home, and declaring if offices are empty for a period over 120 days (increased from 90 days before the pandemic).

Before the crisis insurers included ‘inspection by law cover,’ carrying out inspections such as PAT testing, forklift inspections for factories, etc. but are now removing this, and passing the risk back to the employer. Regarding fire risk, it is expected that home insurance would be unaffected by having work equipment or furniture in the home.

Lastly, in terms of accidents while working from home, there does not appear to be any case law at present that would provide guidance, but we can expect personal injury lawyers will step in with claims as home working continues to increase.

6.3 Technology and cyber security

Technology has created the ability for businesses to choose whether to implement remote working policies, but it also creates a unique set of challenges which present a constraint on an employer’s ability to control their operations, increasing levels of risk if poorly managed. Similar to health and safety, many businesses that did not have remote working policies and procedures in place before the crisis will have had to catch up to, and implement, best practice. Many companies moved staff to homeworking with little thought to these issues and will need to correct this in the near future otherwise they face being unprepared for properly protecting confidential data from leaks or attacks.

Complacency is a big issue for businesses who think they are well protected without fully understanding the scale of the risk. A specific example is that VPNs may give a false sense of security that the whole network is protected, while, in reality, they only provide protection against man in the middle attacks.

With the boundaries between work and private life broken down, business is being done over home ISPs, with unmanaged routers, and people working for different companies using the same networks. Personal networks may already be infected with malware or compromised hardware, which can be exploited for staging attacks against work devices, and if endpoint security is poor, they pose a threat to the company.

Employers must also realise that employees' conversations can now be listened to by families and flatmates that work for other organisations, that laptops will be left open while employees get up and go to bathroom, or that documents left lying around may be read by people who should not have access to them.

Mobiles are a point of weakness, and the most common and pervasive platform in personal lives. Employees may turn to mobile devices quickly because they are familiar and comfortable with them, making it clear what can and cannot be done on mobiles is important as hackers will start with identity theft and machine exploits, but will figure out new ways to target these devices too.

Homeworking also creates productivity issues that employers will have had more control over in the office. A recent survey carried out by Nextthink, which looked at the technology problems that disrupt work showed that employees were held up by simple issues, such as VPN access to critical software (38%), Wi-Fi connectivity and reliability (37%), or had challenges using video conferencing applications (35%).⁴⁴ When staff are out of the office these issues can be harder to resolve.

Lastly, slow internet connections may prevent employees from accessing cloud services or using video conferencing applications. This will not be a problem for most employees but those based in rural locations are more likely to face issues.

Some of the above issues may seem trivial, but they are all instances of how employers have less control

over their operations while staff work at home and are exposed to greater risk. Following best practice for cyber security will mitigate the risk businesses face, but ultimately cyber security is easier to manage when you have control over the networks, easy access to machines and documents are in a secure environment.

6.4 Agglomeration

In this economic climate businesses are not only rethinking how much office space they hold and how many staff will be in the office regularly, but also where offices are located. Much of the research on regional inequality and why capital cities have continued to outgrow the regions over the last decades focuses on the agglomeration effect. Research has found human and financial capital has concentrated in cities at the expense of the regions, mainly as cities went through deindustrialisation first, specialised in services, and were able to capture most of the new economic growth and employment⁴⁵. In theory many services require face-to-face or in person provision, particularly public services, retail, and accommodation, which should keep employment roughly as dispersed as the population. However, many professional, mostly private sector, services benefit considerably from agglomeration effects and tend to cluster in more densely populated urban areas. Predictions that advances in information communication technologies would make location irrelevant, and that jobs and businesses would move to cheaper areas have proven largely to be incorrect. When any business can be anywhere, the optimal strategy is to be as close to other businesses as possible, to negate location as a competitive advantage.

6.5 Location

Of course, businesses are also sensitive to prices, and lower rent costs outside of London have already pulled away businesses or created enough incentive for others to move part of their operations out of London. Prime office rents, according to JLL, were between £32-£36.50 in the Big 6 regional UK cities, while in the City of London they were £73.50 and in London's West End they were £117.50, in the first half of 2020. Many businesses have already taken advantage of this price differential.⁴⁶

JP Morgan announced in September 2019 that they would open an office Glasgow for 2,700 employees.⁴⁷ Goldman Sachs was also looking at a similar move to Birmingham or Manchester at the start of 2020.

The UK Government announced on 11 March that 22,000 civil servants were going to be moved out of London over the next decade. The Government's aim is to help 'level up' the regions.⁴⁸ This will help attract businesses out of London as many private sector services businesses rely on the Government as a client. But as of August 2020, there does not seem to be a mass exodus of businesses looking to leave the capital. Businesses are looking to move offices, but with an aim to downsize office space, rather than move location. A number of big companies have recently announced plans to reduce office space, deciding that remote working, at least part of the time, will mean less people in the office. Capita have not renewed leases on 25 of their offices. Lloyds Banking Group is reviewing its office space requirements after deciding most of its 65,000 employees have performed well working from home. Barclays chief executive Jes Staley has said having thousands of people in a building may be a thing of the past. NatWest, Fujitsu, Twitter and HSBC are all looking at their office space requirements as well. While 24 of 50 companies surveyed by the BBC had no plans to bring staff back into the workplace.⁴⁹

It is clear, however, that people are leaving London. There are a number of factors behind this move. In a recent Savills survey, 44% of respondents were reconsidering their commute time to work, while 75% of people active in the residential market said that COVID-19 has led them to rethink their work-life balance. For under 50's this rose to 84%.⁵⁰ Because people believe they will be working from home over the long term, they want more space to work comfortably, and heat and noise insulation are more important now too. Lastly, people are reporting that a sense of community is more important to them. The Chancellor's Stamp Duty Land Tax holiday has given a sense of urgency as people look to complete property transactions before 31 March 2021 driving house prices to record highs in many areas.

The pandemic has created the opportunity for many businesses to rethink their operations, how they use their office space and where staff will work from. There are, however, real constraints that limit just how

far reaching these changes can be. Complying with health and safety obligations will be more difficult as employers do not have the same level of control over the environment their staff work in. Previously, if hazards prevented safe working, the employer could identify them and deal with them appropriately, whereas if staff are at home much of the responsibility rests with the employee, the same is true for insurance. Cyber security risks become much harder to mitigate when employers are not in control of the network, or all the devices connecting to the network. Employees working at home could have conversations listened by family members or housemates who work for other companies and securing devices and sensitive documents is a challenge. Technological issues may slow down staff and without dedicated assistance present will take longer to resolve. Lastly employers may be looking for new locations to reduce rents, but economic pressures to remain competitive have so far kept them in London. Non-client facing parts of businesses may be shifted to regional cities, but roles where face-to-face interaction was necessary to build working relationships are likely to remain in close proximity to each other.



7.0 A framework for the future

Providing clarity about the future and possible outcomes is difficult at the best of times, and in the current climate, predicting where we will be in one month and making plans for this is near impossible. With that said, we still want to provide a framework for thinking about the future and how events may play out.

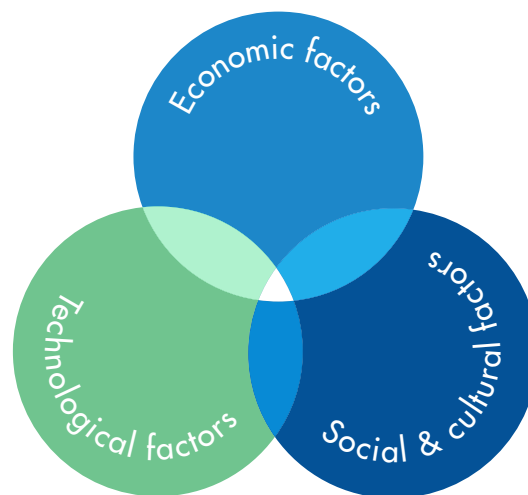
Here we will lay out a framework for thinking about how different companies will use the office, and for thinking about the future of the office.

At a macro level, business culture will drive the adoption of remote working. Changes in business culture are already profound, and the longer we live with social distancing and restrictions, the more entrenched these changes will become. Individual businesses need to assess their own needs and make decisions based on

how they can utilise the office, while many of these decisions will be made with respect to constraints. To be an employer of choice, businesses will need to be able to offer flexible working policies and the support to make these work, part of this is making sure that employees have the correct office furniture at home and that offices have furniture that matches their needs. Lastly, leadership and management teams will have to adapt to these new changing realities.

7.1 The impact on the office, our towns and cities

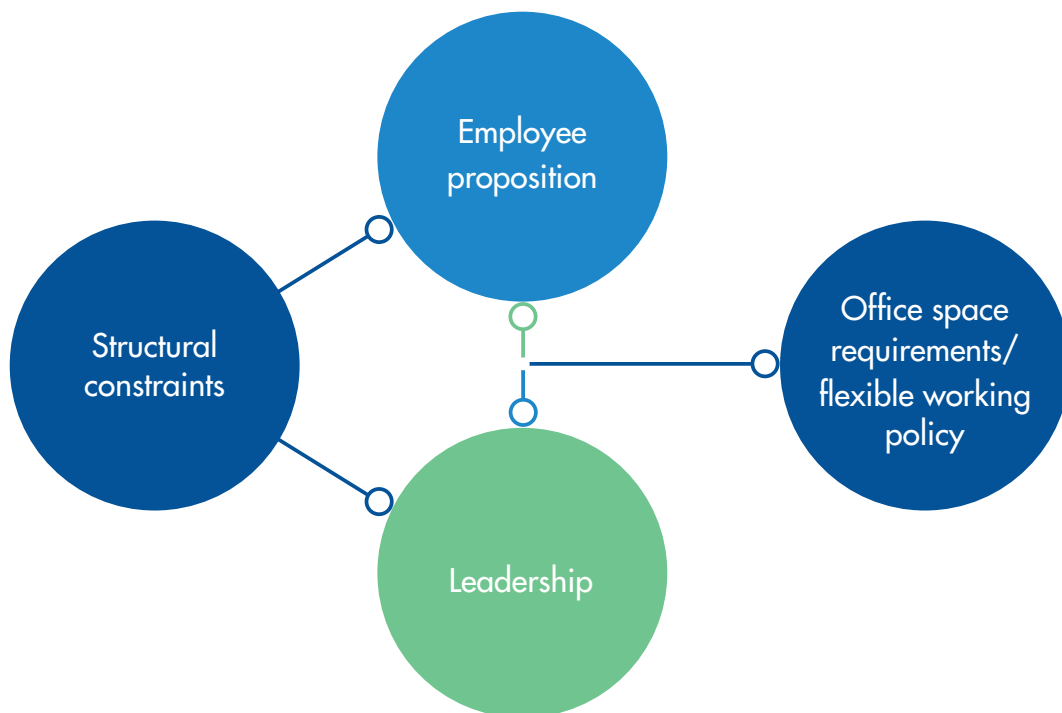
The wider debate on the future of the office and cities is influenced by many factors as already highlighted in this report. This can be simplified into three key elements:



Economic and technical factors are constantly changing; however, social and cultural factors tend to be slower to respond acting as a brake on rapid or major change. The current pandemic however is creating an environment where new norms are being learned and reinforced. The longer the restrictions and changes are in place the greater the cultural change within individual businesses and in the wider society.

7.2 A framework for understanding office space requirements

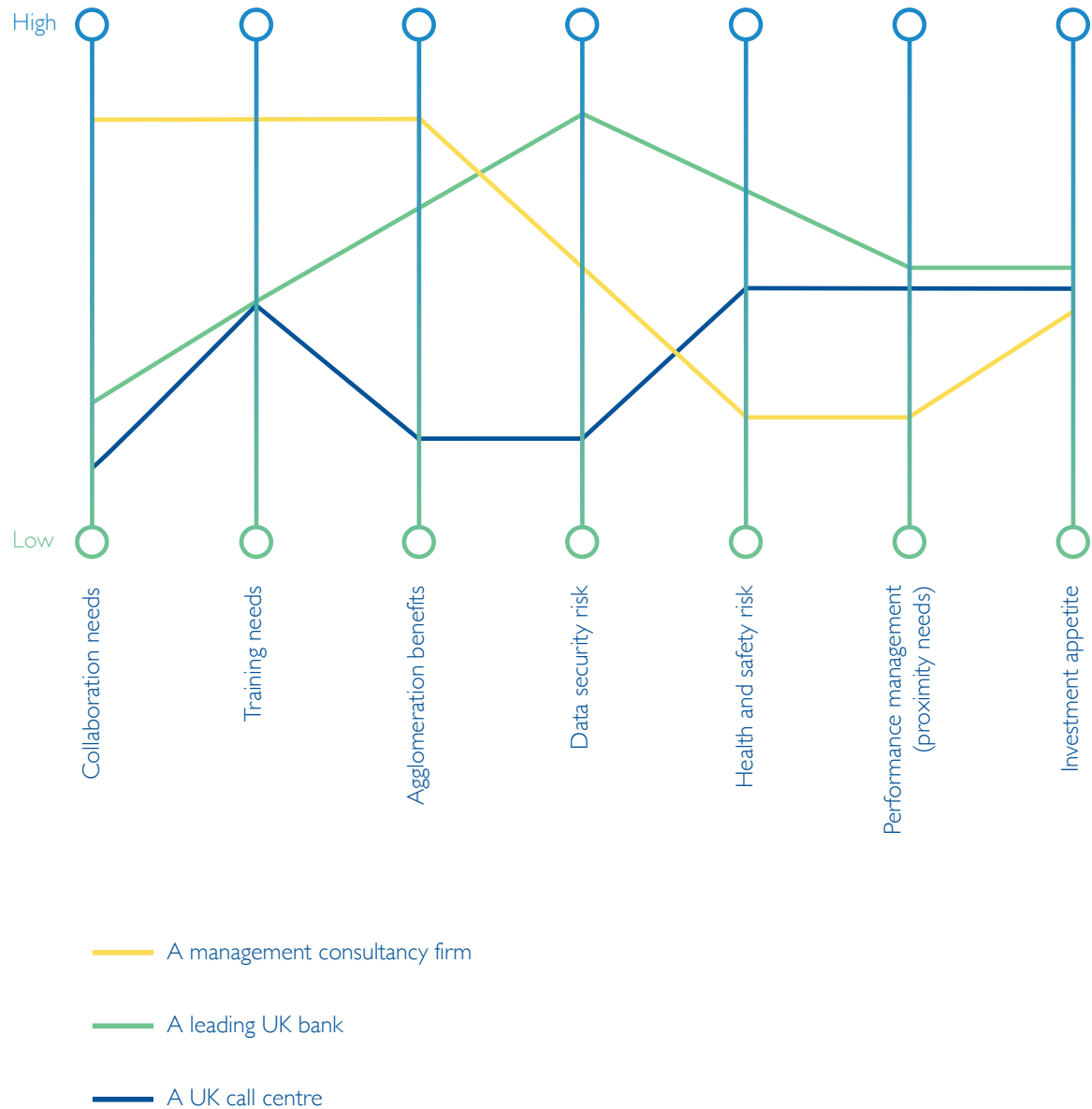
For business leaders' choice regarding the future of offices and the work style of the future is complex. There are many factors relating to performance and employee well-being, as highlighted in this report.



There are a number of structural constraints and parameters that will influence the decision. Every business will vary in the scale of the shift to a blended approach to work providing the flexibility to work both in the office and remotely. During our research we identified eight elements that were frequently mentioned as the key constraints on how businesses choose to implement remote working.

7.3 Example of how structural constraints impact different businesses

On the graphic below, we have highlighted these elements and shown how three example businesses would plot on this framework. The top of the scales represents higher need for office space, and the bottom represents a lower need. Where businesses find themselves on the scales will give them a view of how much office space they need, why they need their office space, and a way to look at strategies to mitigate these constraints where they can.



7.4 Employment proposition

Businesses will need to consider the above constraints, but also pay attention to what employees want and need to succeed. The reality is that this is much more difficult to measure or put on a scale as it is dependent on the individual employee. Going forward all businesses will need to offer more flexibility and implement remote working policies as most employees expect some degree of flexibility now.

The research points out that being in the office full time or remote working full time are not optimal for employee productivity, wellbeing, team culture, or trust. A key aspect of making homeworking effective, is that employees have the right equipment at home. For the furniture manufacturers we see this as an opportunity.

Many workplaces, both office and home, are not equipped for this new reality. Many employees, working remotely, are working in spaces that are not fit for purpose, missing equipment such as desks, task chairs, and other equipment that allows them to be productive, adheres to health and safety regulations, and helps with their wellbeing. Businesses that no longer need as much desk space but want space for collaboration will need to put this in place. Our view is that office furniture manufacturers can work with businesses to create a desirable employment proposition and help them position their businesses as the employer of choice wherever and however their employees' work.

7.5 Management and leadership

Leadership teams are faced with a reality that has changed dramatically. Technological, economical, and cultural changes over the last six months have meant that people are increasingly expecting and able to work from home. There is little prospect of things going back to the way they were before the pandemic and leadership teams will need to adapt.

Businesses have to face the hard constraints we have identified which will force certain decisions for how their businesses operate in the future. However, they still have decisions to make and implement. To make these choices work and to have successful flexible working policies, management will need to make sure they can successfully adapt to manage the aspects outlined in the employment proposition which may mean upskilling or reskilling.





8.0 Conclusion

Despite speculation that the office is dead, and businesses will move to full time remote working, the office still has an integral role to play. Just what this looks like will vary from business to business but the evidence is clear that businesses need engaged employees to increase productivity. Offices and collective spaces are key to this, delivering employee choice, control and balance increasing engagement.

The future always looks different from the past. The COVID-19 pandemic is heavily impacting both business and the wider cultural landscape, changing habits and buying behaviours. The longer the pandemic continues the greater the cultural change. It is clear that the world of work has changed. In some cases, entire industries may never recover whilst others are growing rapidly. The same will be true of the way we work.

Undoubtedly, for many, the pre pandemic 9-5 in the office will be a thing of the past. However, for a wide range of reasons from wellbeing, through productivity to risk and control, the office will remain a key element of our work experience. A blended working approach, mixing the office with remote working and redesigning office and home working spaces, will be required to support the future of work. Businesses need to carefully consider the issues identified in this report before taking decisions on the future of their office space, and on the way their employees work in the times ahead.

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