



MJ Hudson | Photography © Tim Soar

## TIME TO TRANSFORM

### Workplace Post-Covid 19: Trends, Predictions, Facts

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# TIME TO TRANSFORM

## TRENDS, PREDICTIONS, FACTS

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The future isn't what it was. The present requires us to transform our workplace and built environment – Adapt, Evolve, Improve.

Assumptions that we thought reliable have turned out to be false. A digital, distributed working culture is not, after all, a techno pipe dream. Office space with a physically monitored workforce is not as fundamental to productivity as it was held to be; how we work is no longer wholly dictated by the employer.

Office life, on the other hand, despite the commute and potentially outdated restrictions, is missed, and more relevant to individual wellbeing and a flourishing business than we might ever have imagined.

So, as restrictions ease and a different normal slowly emerges, what will the working culture of a brave new post-Covid world look like, this year, next year and beyond? Will the old pre-Covid order reassert itself, in the struggle for business survival, the bottom line and shareholder value?

The pandemic has been a catalyst of change, accelerating some trends and bringing others to an abrupt halt. Which ones will have a sustained impact on real estate, in office space and in workplace layout and design?

Work, more clearly than ever, is not a place where we go, but something we do. Will the need for office space reduce as a result of agile working and choice, or counter-intuitively, grow?

Covid was a grey rhino event, not a black swan. Big, dangerous but predictable. Other pandemics, similarly, lurk just over the horizon. For now, health and safety of employees is at the top of the agenda: but what does best practice mean in safe office space design and layout, in protective building management?

Employee experience? Occupier strategy is going to be all about workspace amenities, because the office is set to be a space for safe interaction and as a destination – it must be creative, collaborative, and act as a social community reflecting culture and brand. How do changes around safety and communal amenities affect recruitment and retention, career opportunities, landlord and tenant relationships, the role of the concierge and the details of the service contract?

At KKS Savills we have been looking at all these questions on the future of our work patterns and workspace and dealing with them, like you, as a business during the crisis. The difference is we were looking at the issues well before lockdown. Our thinking is rooted in over thirty years of experience of workplace and environmental design, and an understanding that the office environment reflects our values as a society.

Covid-19 has been a truly transformational moment in our personal lives: here are our thoughts and research-backed data on what it will mean for life at work, wherever that may be in the future.

# OCCUPIER INSIGHTS

	TRENDS	PREDICTIONS
 Real estate	Everyone is talking about real estate. Release or retain?	Space take up needs careful consideration. Greater landlord and tenant relationships are needed
 Remote working	We all did it, but is it really working?	People have tried it, they like it, they want it. The future will be about choice.
 Health	Improved diet and exercise potential – how can we encourage more?	Build on individual health benefits, bring more in to the workplace.
 Wellbeing	Working from home, what are the physical and mental health issues?	Communities are vital for mental health, it's not just about the bottom line.
 Environment	The environment has benefited – how can we continue this social responsibility?	Climate change impact has been great, we must not forget what we've learnt.
 Building design	New design guidelines are necessary: how can smart technologies assist?	Apply a 'Human Grid' with bricks and mortar. Minimise touchpoints, centralise deliveries.
 Materiality	Enhanced cleaning and sanitisation. What can we learn from healthcare?	Creative application of surfaces and materials, virus-limiting materials, e.g. copper and silver.
 Food & beverage	Immediate impact likely to close shared tenant kitchens: can pop-up F&B takeaway retail assist?	Tenant kitchens closed, more reliance on landlords for F&B takeaway/delivery offer.
 Residential	How will we redefine residential design to accommodate home-working?	Residential design rethink to provide space to work, location and space will be key.
 Decentralisation	Home or office are today's choices. Is there an alternative?	Third spaces emerging on local high streets. The office will live on as a destination and community hub.



# REAL ESTATE

## RELEASE, RELOCATE OR RECONFIGURE?

The physical office will be required but it must change to focus on social activities and wellbeing as well as resiliency and flexibility

The office has never been just bricks and mortar. It's about people, knowledge and culture. Cost or community?

Reducing overheads and trimming expenditure are the first thoughts of any business faced with challenges to profitability let alone viability. Expensive real estate is always high on the cost-cutting list. In the uncertain post-Covid economic climate, V-shaped or W recovery, swoosh or a hockey stick, minimising the office footprint seems an obvious way to go. Seize on the lease event, take up the break clause, sub-divide floors or relocate entirely.

After all, if the sudden and dramatic shift to remote working means anything, it means that headcount on the floorplate can be reduced. And less space equals lower overheads.

A recent Savills Office FiT survey found only 4% of respondents would never work from home following the return to their workplace. Most now want to work remotely up to 2 days a week.

Take a moment to reflect before you call the movers. Without alterations to work and social space, distancing restrictions will only allow 20-35% of staff in the office at any one time. For the next few months occupational densities will be between 16-20 sq m per person, a significant reduction to the open-plan densities of 1:8 sq m to 1:12 sq m we are used to.

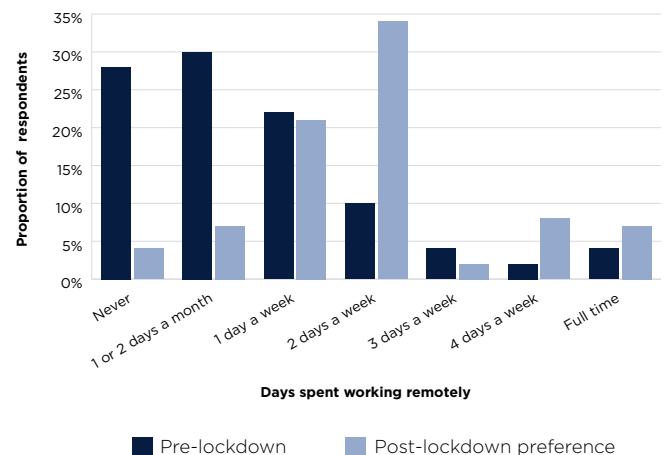
In other words, the same space is going to be taken up by fewer staff in the short term.

In the mid-term, with minimal changes to the workspace, adding screens, stripping out chairs and re-purposing conference rooms, headcount will slowly increase, but governed by fundamentals of space and population only to a maximum of 45-50% of staff.

As Eric Schmidt of Google points out: "We'll have more demand for office space, not less. People will want social distancing."

Those are the basics, but not the whole story. Lockdown has legitimised certain ways of working previously considered unlikely to be productive. Even government service sectors, historically conservative about a tech-supported remote workforce, now understand that digital transformation offers advantages.

### PROPENSITY TO WORK FROM HOME POST-LOCKDOWN?



SOURCE: SAVILLS OFFICE FIT SURVEY JUNE 2020



# REAL ESTATE

## RELEASE, RELOCATE OR RECONFIGURE?

So as we build up to that mid-term maximum of staff in the workplace, business has a vital opportunity to shape the new post-pandemic normal. How much real estate required by firms will depend on a negotiation with employees over the perfect combination of part-home, part-office, part-third space work patterns: teams working in shifts, rotating into the office, extending building opening hours. Undoubtedly, the pandemic has sharpened a desire for a healthier, more balanced work and personal life.

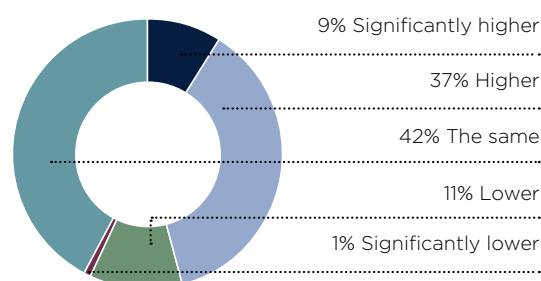
Firms will have to adapt and develop agile working policies or suffer the consequences in recruitment and retention. In other words, as the great return takes place, discussion about real estate use should not be driven by cost alone, but more by staff preference and productivity, mitigating risk, and building confidence in a safe, healthy, clean space. All of which begs another question: why return to the office at all?

YouGov reported pre-pandemic 2017 that 89% of employees considered flexible working was a primary factor behind increasing their productivity. We now know this to be true - Savills Office FiT Survey highlights that 71% believe their productivity during lockdown to be equal or greater than before.

But at what cost? Longer days, blurred boundaries and non-stop Zoom calls are burning employees out. Choice is no longer viable when invites pop up unexpectedly, replacing the emails sent late at night.

### PRODUCTIVITY WHILST WORKING AT HOME

**88%** feel their productivity would be the same or higher if working from home was part of their routine



SOURCE: SAVILLS OFFICE FIT JUNE 2020

However the crisis has not rendered the office obsolete. It offers something that home working cannot: real-time, physical space that fulfils a fundamental human need for face-to-face social connection and common purpose.

The key spaces in the new office will be those that provide settings for people to come together but remain physically distanced. Upgraded client areas, space for those significant deals and customer service safely; important eye-to-eye meetings, reading body language in person; team training and bonding; management, mentoring and staff assimilation, all building blocks of cohesion and collaboration, of business culture and community.

So what does this mean for real estate - release, relocate or reconfigure?

For employees to feel safe in communal spaces for group-type tasks will take more space, not less.



# REAL ESTATE

## RELEASE, RELOCATE OR RECONFIGURE?

Although 55% of respondents of the Savills Office Fit survey said that post-Covid they would prefer home-working up to two or three days per week, 89% still thought that having a physical office was important either always (47%) or short term (42%). Isolation resulting in mental health and lack of confidence will harm our next generation – our future.

On the cost-cutting side, pre-pandemic agile working did not necessarily mean less space; however post-pandemic, if remote-working remains a choice supported by appropriate technology and trust, effective agile workplaces imply reduced pressure for office workspace to some degree long term.

High-density, open-plan spaces, currently mothballed, offer short-term redesign opportunities for controlled social settings that support cohesion and collaboration, cost-effectively enhanced with biophilia, art and texture, creating an enriched environment already valued by employees.

In short, there is no one real estate solution that fits all. But a knee-jerk reaction isn't the answer. Finding the ideal uptake of space for a business, post-Covid, will require a new level of employer-employee engagement and feedback. Regardless of the final balance of time spent in office or at home, the new normal will have dramatic consequences for the landlord-occupier relationship; those who embrace a partnership will ultimately be winners.

### IS THE OFFICE A NECESSITY?

**89%**

of respondents believe that the office will remain a necessity in the long term or short term at least

### WILL THE OFFICE CHANGE?

**71%**

believe office design will be impacted

**74%**

believe that space and size will be affected

SOURCE: SAVILLS OFFICE FIT SURVEY JUNE 2020



# REMOTE WORKING

SHORT TERM NECESSITY. LONG TERM DESIRABILITY.

Be clear in expectations of people and understand that routine, rigour and robust direction are required to establish boundaries and balance

The Covid-conundrum is this: will we forget and go back to working as before?

Lockdown is proving simpler to impose than lift. As restrictions ease, some people are going back to work while others are not. But we are all at work already, just working remotely.

Research by talent management firm BSP found that 67% of agile businesses reported a significant boost to their productivity, up to 20% in some instances.

That remote working is widely possible and successful, even under the most trying circumstances, has been a revelation for many. And while the primary drive was to come up with temporary solutions to enable business continuity, the genie of choice is out of the bottle. Ultimately, the concept that work is a thing you do, not a place you go, quickly became an everyday reality. Staff showed they could be happy working from home, and senior leadership learned that productivity need not suffer.

Organisations already practising agile working, mainly tech firms but also some forward-thinking lawyers, were the first to get up to speed after lockdown. But the banking and insurance sectors, along with traditional law firms hitherto unwilling to embrace change, found their feet after a period of adjustment; 'no change' in productivity and client effectiveness was widely reported during lockdown, in itself a major change to assumptions about agile working.

HR Review reported during lockdown that Visier, a cloud-based analytics application, asked over 1,000 employees either previously not normally allowed to work from home or who do so no more than once per week on average, found 47% believe leadership will revert back to previous working practices once this virus passes.

The freedom of agile working comes with its own share of employee responsibilities, employer obligations, and particular challenges. Occupational health in all its guises becomes an issue, and we believe not an area which has really yet been tackled effectively. The correct chair, standing desk, multiple screens and specific physical needs hasn't yet been assessed; insurance claims for medical and public liability are waiting in the wings.

What has been a positive outcome is that firm wide communication has increased with greater engagement and transparency from senior leadership. Personalities on the introvert end of the spectrum have flourished away from the noise and energy of the workplace, the natural habitat of extroverted characters, who conversely have had to deal with a degree of isolation during the pandemic.

**67%**

of agile businesses reported a significant boost to their productivity, up to 20% in some instances

Source: BSP



# REMOTE WORKING

SHORT TERM NECESSITY. LONG TERM DESIRABILITY.

Covid has shown that the social aspect of the office is an important part of emotional wellbeing. A 2019 survey of 160 diverse individuals in a variety of industries and positions by Harvard Business Review, found that across all industries, workplace social connections play a central role in fostering a common sense of purpose, and individual happiness.

“Effective management of social capital within organisations facilitates learning and knowledge sharing, increases employee retention and engagement, reduces burnout, sparks innovation, and improves employee and organisational performance” – HBR July 2019

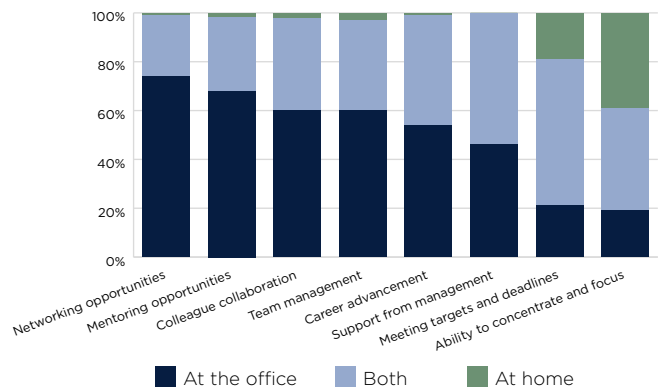
At KKS Savills we have always rooted our workplace design and strategic thinking in empirical data. ‘Transformation through Data’ suggests agile working is here to stay. But incorporating it to everyone’s advantage, creating a successful future normal of office and remote working is a question of change management.

Large-scale change initiatives fail when employees do not understand why change is occurring or do not feel safe, recognised or rewarded. In these uncertain times, ensuring they do must be a priority.

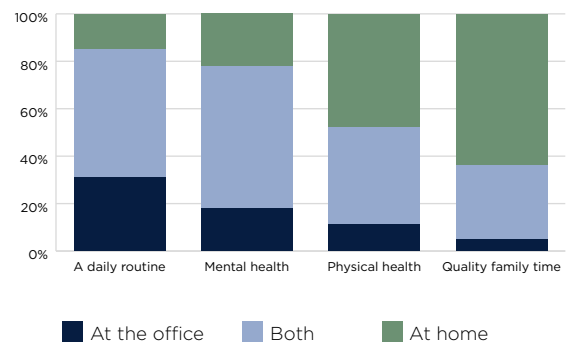
A structured, well-communicated, egalitarian approach is critical to achieve clear, well-documented outcomes, as we well know.

Strong, caring employers who trust will be the winners.

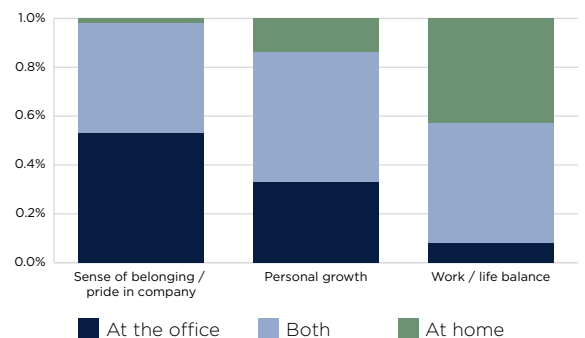
## LOCATION PREFERENCES BEST SUITED FOR THE HUMAN EXPERIENCE OF WORK



## WHERE DO OFFICE WORKERS BELIEVE HEALTH AND WELLBEING IS BEST DELIVERED?



## WHERE ARE PERSONAL EMPLOYEE PRIORITIES BEST MET?



SOURCE: SAVILLS OFFICE FIT SURVEY JUNE 2020





# WORK & WELLBEING

## MORE CHOICE OR MORE CONFUSING?

Productivity increases when people are empowered to choose where, when and how tasks are completed whether at work or elsewhere

In theory, remote working offers obvious physical and mental health benefits to the individual: freedom over how, where and when you work is surely better than being tethered to an office nine-to-five, Monday to Friday. But in practice?

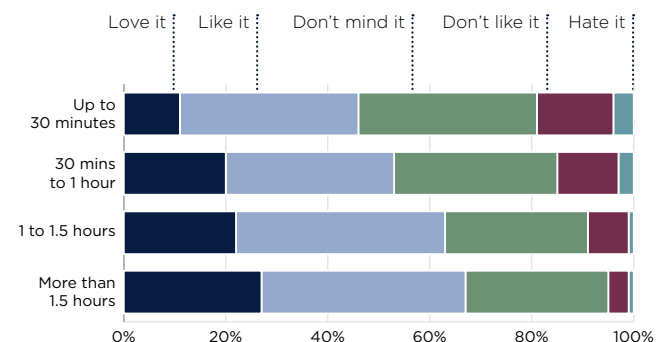
Life-work balance can improve; commuting time replaced by family time. Work space at home is curated personal space too. And with everyone in lockdown, work efficiency improved. The simple question became an instant message; long meetings became a quick video call and started promptly. The IES, Institute for Employment Studies, carried out a survey of the wellbeing of homeworkers under lockdown.

The interim survey analysis showed that, overwhelmingly, the most commonly cited benefit of home working was the elimination of the dreaded commute. People identified that by not travelling to work, they were saving money, reducing the stress and tiredness associated with commuting, and having a positive impact on the environment.

And yet the same survey also found an increase in musculoskeletal complaints. Time was not a luxury available when lockdown began, and many people created ad hoc workspaces at home. More than half of respondents reported new aches and pains associated with bad posture, including in their necks (58%), shoulders (56%) and backs (55%).

Remote working challenges different generations of the workforce in different ways. Early-career professionals in sharing households will have been competing for space to call a home-office.

### HOW DO OFFICE WORKERS WITH LONG AND SHORT COMMUTES ENJOY WORKING FROM HOME?



SOURCE: SAVILLS OFFICE FIT SURVEY JUNE 2020

Their future working day will include time in the office, an attractive prospect for anyone who attempted to work against a background of young children and home schooling. Quiet personal place to work is still a perk of seniority.

Without an established framework, or structure to the working day, guidelines for employers and policies for staff, and constantly open channels of communication, the result was also 'panic working'. Presenteeism became an issue, pressure to be seen in virtual meetings, to be online, and on time, has been considerable. Individuals found ways to exercise control which were not productive or healthy. All of which means increased stress, often in combination with feelings of isolation.

Ordinarily organisations are required to undertake a risk assessment to identify workplace hazards that may exist, remove or minimise them. With home working here to stay, these aspects will have to be addressed, along with clear guidelines around employee start times, logging off after contracted hours and all life in between.



# DECENTRALISE

## HOME OR OFFICE?

Working from ‘third spaces’ can address what workers will want, may provide local communities and businesses with revenue, and revitalise the high street

### WHAT ABOUT THIRD-SPACES, SATELLITE HUBS AND CO-WORKING?

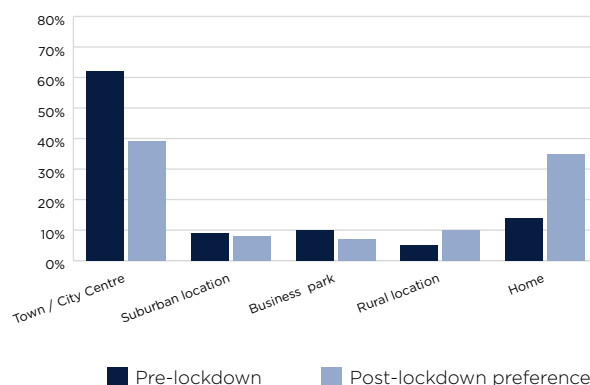
Agile working encompasses any setting best suited to the work and the employee, the team and the client. It turns the possibility of a ‘third space’, between office and home but without the distractions of either, into a viable reality. What does that mean in practice?

In a word, decentralisation. With the benefit of post-Covid hindsight, large corporates are not alone in questioning the value of a single headquarters building for future business resilience and continuity. It remains important for brand, profile and social activity, as the public face of the company to clients, source of corporate uniformity and control. Equally, to employees facing public transport each day, ‘headquarters’ means an anxious commute. Crowds and congestion still make people uneasy, even as physical distancing is relaxed.

And while the pandemic has demonstrated that we do not need to be in the same place each day to work effectively, and communication can be virtual without affecting productivity, most individuals will still like to be in the company of others at least a part of their week.

The solution to these competing wants may lay in a campus-style approach to corporate real estate: strategically placed work hubs at out-of-town fringe or suburban locations chosen for their proximity to employee demographics. It’s not necessarily the cost of the real estate, but the locality to their employee base.

### WORKPLACE LOCATION MOST FREQUENTLY USED



# 82%

currently favour working in the city centre, falling in the future to

# 47%

SOURCE SAVILLS OFFICE FIT SURVEY JUNE 2020



# DECENTRALISE

## HOME OR OFFICE?

While quality and fit out expenditure need not be at headquarters levels, these third spaces bring corporate touch-down, drop-in spaces within easy reach of employees and offer the choice they know is possible, as well as the desirable psychological separation of home and work.

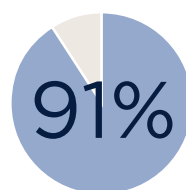
It's a members club for employees, which allows the individual to work, eat, exercise and play, when they want /how they want. It's about choice near to home, but not home, be part of the firm, but not in the firm's HQ.

The importance in terms of recruitment and retention should not be underestimated. The CIPD 2018 'Flexible Working: the business case' found a strong demand for more flexible jobs; 87% of people want to work flexibly, but only 11% of jobs are advertised as being flexible.

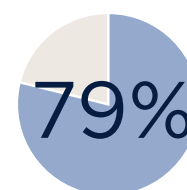
They say staff are more likely to recommend their employer, stay loyal to their organisation and go the extra mile if their employer offers flexible working (and means it) and that with higher levels of engagement, experienced by working flexibly, staff turnover can be reduced by 87%.

With increased acceptance of a 'work-anywhere' approach, confidence in digital connectivity and 'heard but not seen' leadership of a remote workforce, 'third spaces' managed by co-working providers, corporates themselves, or by landlords are set to become significant elements in the post-Covid real estate portfolio.

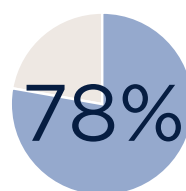
### REASONS FOR REMOTE WORKING



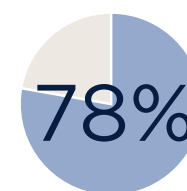
achieve better work-life balance



improve productivity

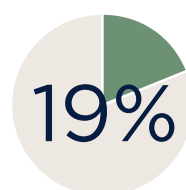


avoid commuting

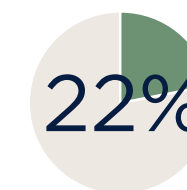


reduce stress

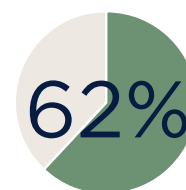
### DOWNSIDES TO REMOTE WORKING



loneliness



switching off after work



poor technology

SOURCE: MERCHANT SAVVY 2020



# BUILDING MANAGEMENT

## NEW REGIMES AND RELATIONSHIPS

**Landlords and occupiers must work together; ultimately a union of both parties who are tied in together equally will be the winners**

One certainty in the Covid uncertainty is that building and property management, previously barely mentioned in the boardroom has been upgraded to a business-critical function.

One of the truly big shifts in the post-Covid world will be in the building management team and the range of services that occupiers rely on and the landlord can offer. No office space can be 100% free of any virus, but in the short term at least, anti-microbial strategies will have to start at the front door.

Lives may depend on a concierge or building manager carrying out best practice on minimising transmission. Buildings must be open later and longer, clean and hygienic 24/7, to accommodate physical distancing work patterns, office rotas and shifts as the agile-office work balance evolves.

It will fall to facilities teams to ensure a safe steady people flow through a building's communal areas, sanitising elevators, corridors, washrooms - all areas with compromised capacity. Systems will have to be in place to avoid congestion in building lobbies as well as lifts and stairs.

With 80% of Covid transmission by touch, doors, stair rails, desks, washrooms, even chair backs will be hotspots for transmission requiring constant sanitising, with busy areas needing more attention.

A person touching an infected surface infects themselves and passes the virus on. Focus on good old-fashioned surface cleaning will be fundamental, supplemented by technology to track movements of people gathering, prompting cleaning.

FM teams will be managing new delivery and logistics systems with distribution of lockers, designated collection points and communal ground floor meeting areas that limit access to occupied floors. En masse, alternatives to public transport come with their own amenity demands: motorbikes and scooters (electric or otherwise) require parking, charging points and maintenance stands; cycling, walking or running require lockers and showers that consume space and also need to be physically distanced and safe.

Service charges will have to increase in response to higher expectations and delivery, rendering them a hot-button issue on both sides of the landlord-occupier divide. Occupiers, property managers and landlords should be ready to negotiate new mutually acceptable terms, and with a mutual sense of urgency.

All of which, in turn will make for an occupiers' market as landlords and developers find that useful and safe amenities in existing buildings become the deciding factor for signing or extending a lease, taking more space, or relocating.

More now than ever, the landlord must be a trusted advisor for potential occupiers, placing themselves at the heart of building design to ask the question: what can we do better?



# BUILDING DESIGN

## WORKPLACE WELLBEING

The 1.5m 'Human Grid' applied to layouts provides occupiers with psychological and physical reassurance, and enables organisations to adapt as restrictions change

Employee wellness is a fundamental element of our design ethos: workplace wellbeing attracts talent, and translates into productivity and bottom line benefits. Sky lights, office fresh air, biophilia, rooftop terraces, balconies and courtyards: they all contribute to a better working experience. With Covid it has become a design imperative.

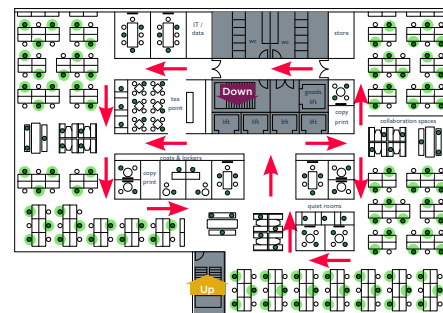
The greatest threat to settling post-pandemic confidence is fear. Fear of Covid itself, of its transmission, of not knowing when and where it will be safe.

A design response for wellbeing must address individual health and safety at work head on, and at a level of detail previously limited to healthcare facilities. They must be our model, both in their rigorous design process and the way in which individuals use space.

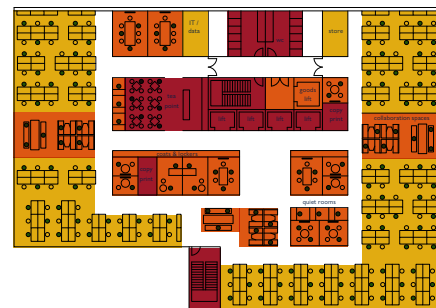
Typically, a healthcare building project team includes doctors and nurses whose lives depend on safety of the environment. Likewise, in the design of new buildings, redesign of layouts, and preparations for returning staff, the facilities teams responsible for occupiers' wellbeing and for enhanced cleaning and safety should also be involved.

Smart building technologies will play their role too, long term, in delivering cleaner, safer and healthier new buildings, complementing the current tech focus on reducing energy use and cost.

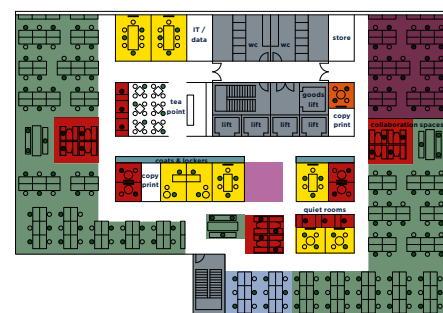
A recent study in the FT by Harvard professor, Joseph Allen, suggests that airborne viral transmission risk can be significantly reduced through improved a/c ventilation and filtration, supplemented by air purifiers. Commonly used in sterile medical areas and for water purification, UV depends on line-of-sight exposure to be effective. Building and layout design will have to consider where UV sources are placed to avoid dark, non-sterile areas that will require particular cleaning.



Physical distancing workstation layout (2m radius)



Areas of high, medium and low shared use



Zones for work activities

SOURCE: KKS SAVILLS OFFICE FIT FIX



# BUILDING DESIGN

## WORKPLACE WELLBEING

At KKS Savills, we have been working with a design overlay to existing and new floor layouts, a 'human grid' to satisfy physical distancing rules, which we adapted from the aligned structural and planning grids employed in design of buildings.

The Human Grid offers a vital tool in managing workspace protocols as restrictions evolve. Where the grid has been particularly effective, has been in revealing overlooked spaces that were previously considered unusable, but now provide ideal quiet locations for isolation, and privacy.

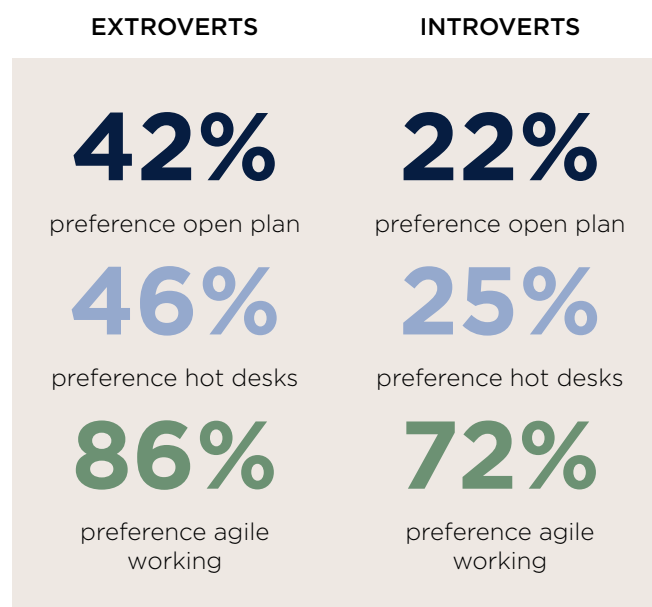
These will form an important part of the range of workspaces available in our future physical environment but given the new emphasis on the office as a social space, flexibility and adaptability no longer become design 'nice-to-haves' but critically necessary elements. Alternate stairs and toilets within demise lines offer separation for tenants, and easy-to-navigate floorplates will aid circulation flow.

A Worksafe UK report in 2019 found that agile working, including home working, has a significant positive impact on people's mental health, sleep and stress levels, and on job performance.

With survival in question for some businesses, and budgets everywhere under immense pressure, office redesign may seem like yet another, painful challenge. But lockdown has presented a real opportunity to embrace workplace change for the better. We can design workspaces that deliver an upgraded employee experience, accommodate their desire for agile working, offer social settings optimised for business needs, and improve working lives.

A (pre-Covid) Workplace Trends survey on 'Workspace Personal Preferences' found the landscaped office (enriched choice), agile working and home working were preferred to large-open plan, hot-desking, even private offices.

*“The debate on open-plan versus enclosed offices rages on, but workplace design is not a such a simple dichotomy. A wide range of modern workplace design solutions are now available such as the landscaped office to activity-based working. Furthermore, office occupants clearly have different workplace preferences. The workplace industry needs to understand what drives these individual preferences. Is it factors like personality, personalisation, flexibility, sense of belonging or familiarity that affect where people prefer to work?”*



SOURCE: WORKPLACE TRENDS / HERMAN MILLER JUNE 2019



# CORONA CATERING

## WITH AN EXTRA HELPING OF SAFETY

People have enjoyed eating home-cooked food and may want to bring in food from home when they return; kitchen areas will have to adapt to meet higher demands

Say farewell to the shared salad bar, the servery and café conviviality in the short term – and the beneficial business effects of eating together as a community. Landlords and occupiers preparing for the return of staff to offices face a vertical learning curve in the complexities of infection risk mitigation. Catering providers too will not only have to be clean; they will have to be seen to be clean, and demonstrate the steps they have taken to ensure safety.

The food service sector as a whole has suffered disproportionately in the pandemic, and their role supplying workplaces will be no less dramatically affected: current Covid anxiety will run from servers to those served.

Anywhere people congregate to eat or drink, tea points, staff vending kitchen or dining areas, remain obvious high-risk areas. In place of the tea point, the tea trolley is set to make a return, albeit pushed by a mobile barista: other spaces replaced by larger fridges for staff food, and additional facilities such as sinks, dishwashing facilities, prep areas and microwaves positioned to allow for appropriate distancing and healthy food cooked at home and brought in from home.

Similarly, in the initial phased return, anything of a shared nature, such as sugar bowls and coffee jars, will be replaced by individual packaging. The level of control we have over the virus will dictate if this remains the standard approach. Cups, utensils, and mats will be discarded after a single use, as they are in healthcare settings.

Prepackaged, in the short term, is the dish of the day, either by individuals bringing food from home, and enjoying the certainty that no one else handled their lunch, or by caterers and sold in individual servings. Besides turning the simple pleasures of eating as a community into a complicated affair, such an approach comes with the unsavoury potential for increased use of plastics, and other unsustainable products. Is climate change to reverse with fear? Or can we push forward with sustainable wrappings and recycling opportunities.

Office of National Statistics Survey, April 2020 published 'Eight things that have kept us going in lockdown'. The preparation and sharing of home cooked meals have been important in the UK.

**45%**

Britons turned to cooking to help deal with restrictions

**£524m**

more spent on groceries in April 2020 than the same time last year

**2.1m**

more people bought flour in the four weeks to 22 March than the previous year

**46%**

increase in sales of sugar in the month to 22 April



# MATERIALITY

## A BRAVE NEW WORLD

Innovation from experience - learning from healthcare can provide the resiliency needed in the future workplace

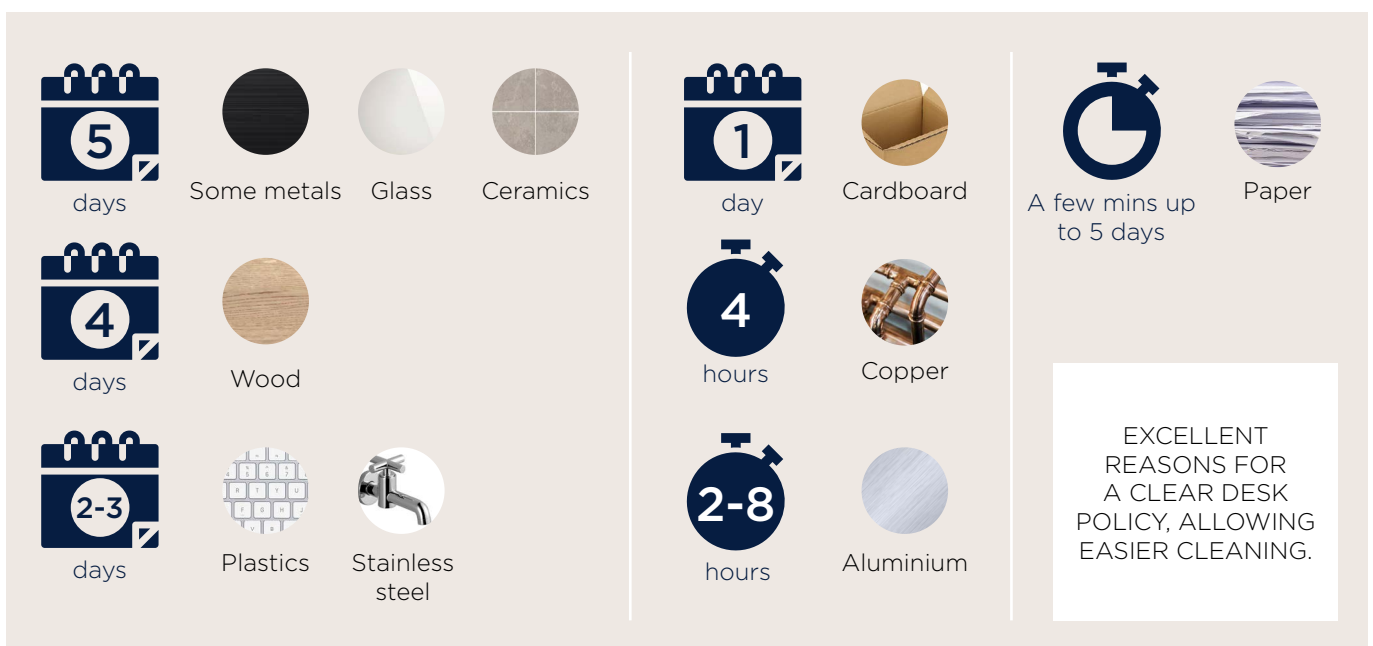
Regular handwashing is the most effective means of breaking the Covid chain of infection, but designing-in anti-microbial materials at touch points reduces the chance of the virus surviving and being passed on. What can we safely specify?

Products impregnated with silver and copper to inhibit microbial transmission in upholstery fabrics, plastic or silicone countertops are set to increase. Already there is a hard, self-cleaning floor product which combines silver with photosynthesis technology to inhibit microbe growth. Light switches, taps and door handles in steel and aluminium can also have an anti-microbial finish as a protective coating.

Many of the anti-microbial products we specify, such as entrance mats, have been developed specifically for healthcare facilities and sterile environments. At the cutting edge of healthcare are polymers that actively repel pathogens, as well as inexpensive, durable surfaces that destroy bacteria through nano-technology rather than chemical application.

One recently developed product for hospital doors, designed to disinfect itself by releasing antibacterial fluid each time it is pressed, will undoubtedly make its way into commercial real estate, a touch point of confidence and safety designed into the workplace and our daily lives.

### VIRUS SURVIVAL RATES:







# TIME TO TRANSFORM

## WORKPLACE POST-COVID-19 TRENDS, PREDICTIONS, FACTS

### What have we learned?

We should design and build for what really matters to us. The last few months has taught us important lessons. How will we work out our future path from here? By listening, learning and looking forward.

For many employers the biggest, and quite possibly the most intimidating challenge ahead, will be realising the ball is in the employee's court. Hearing what they say, how they want to work, designing the office space to overcome fear and anxiety is the task ahead.

Offices are not obsolete but they must evolve to accommodate how people will want work in the future. The physical office is the lynch pin and vital to support healthy corporate culture and success, both for individuals and the wider business.

People have sampled the advantages they have at home; natural light, access to outdoor space, no commute and potential to achieve a good balance between home life and work, it is not beyond imagination that they will want to continue with this, at least in part where they are able.

Communications have changed, facilitated by technology, and this will evolve as we return to the office. Acoustic treatment will be needed for the multi-communication channels to provide privacy and minimise distraction.

But are the video conference screens we are used to sufficient to accommodate the greater numbers of participants? Surely the scale must increase to see those we are speaking to and enable us communicate with a wider group.

So before releasing space and isolating the workforce, consider what potential there is for the future - the valuable lessons we have learned, what we get from colleagues and peers and how resilient we have been - and translate that in to the office of the future.

We knew change was coming, it has just arrived sooner than we thought. Let's take this opportunity to get it right.



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