

T H E N E W N O R M A L

Research, survey and a look into the future of the workplace post Covid-19



MoreySmith

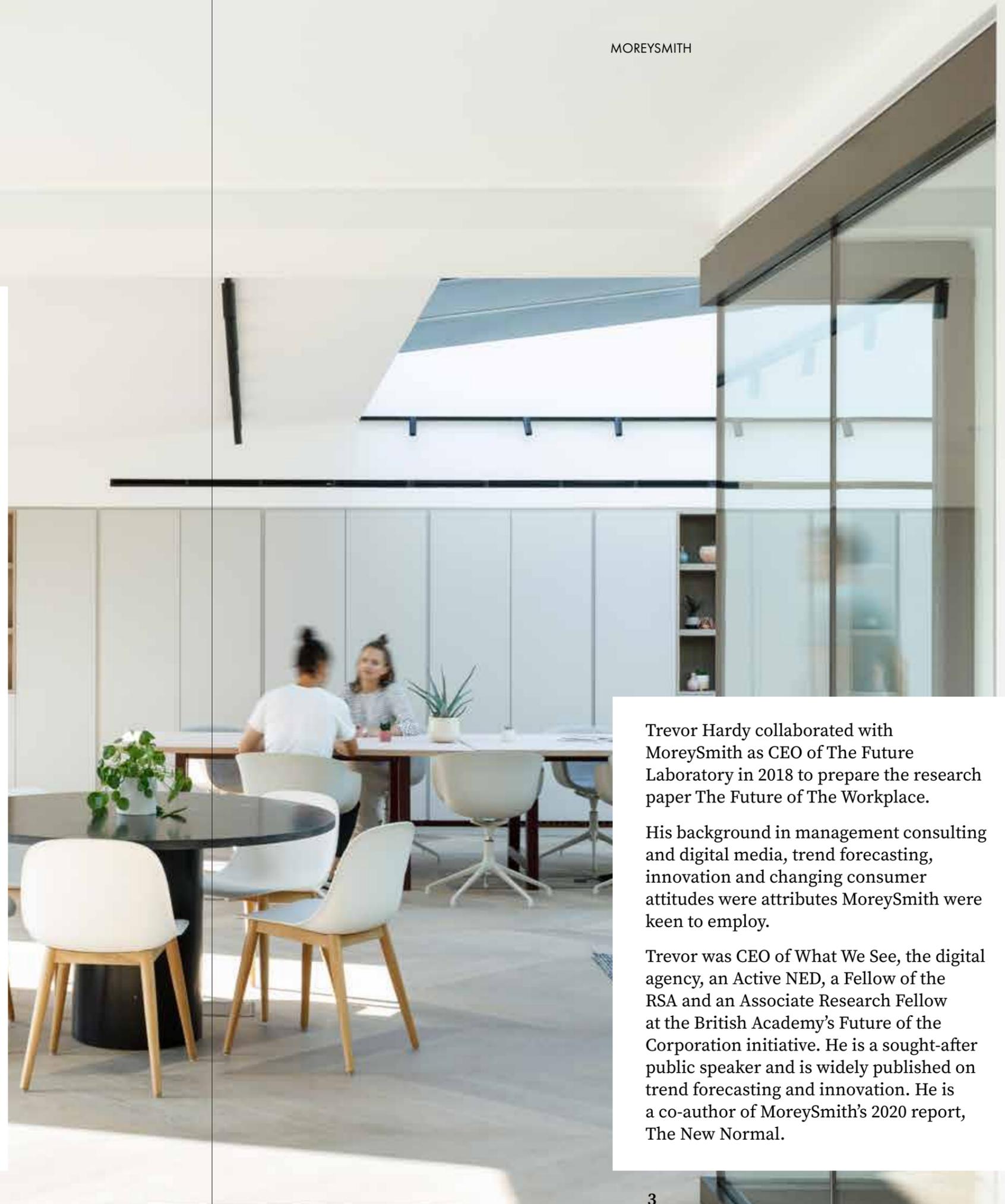
Foreword

MoreySmith is a design and architecture studio with RIBA Chartered accreditation. The studio designs environments for people to enjoy from hotels to residential; boutique offices to global corporate Headquarters. It is in this arena that our report focuses. With the sudden disruption to our business and private lives by the COVID-19 global pandemic, workplaces have never been more in the spot light or more critical to the success of the UK economy, business and even more importantly the health and wellbeing of the nation.

As part of continued research into future trends, MoreySmith have been actively monitoring developing attitudes and the challenges surrounding the return to work.

Our team conducted a survey following the lockdown of March 2020, which included clients and colleagues across professions and business sectors from media to finance, from CEO's to administrative assistants.

The findings have been used to further research these topics and informed this report, The New Normal. This will help us better understand the current and future sentiment of the workforce and how we as designers, business leaders and property developers need to quickly adapt to create environments people want to work, socialise and be part of again.



Trevor Hardy collaborated with MoreySmith as CEO of The Future Laboratory in 2018 to prepare the research paper The Future of The Workplace.

His background in management consulting and digital media, trend forecasting, innovation and changing consumer attitudes were attributes MoreySmith were keen to employ.

Trevor was CEO of What We See, the digital agency, an Active NED, a Fellow of the RSA and an Associate Research Fellow at the British Academy's Future of the Corporation initiative. He is a sought-after public speaker and is widely published on trend forecasting and innovation. He is a co-author of MoreySmith's 2020 report, The New Normal.

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Deskopolitan Chateau d'Eau, Paris

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35%

of people had never worked from home prior to COVID-19

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Sony Music, London

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49%

welcomed the break from routine whilst working from home



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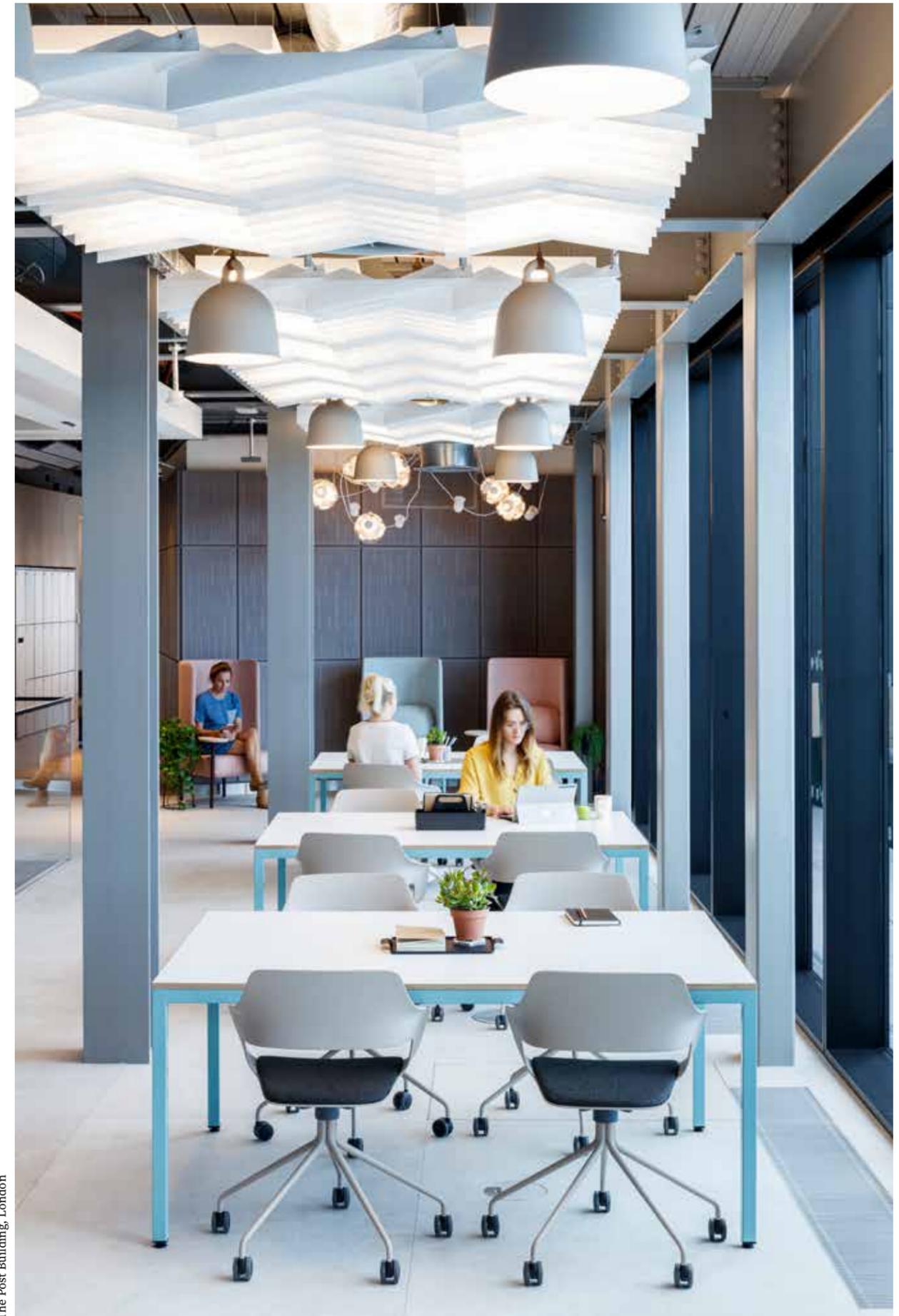
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OVERVIEW

2020, a year where one would expect perfect vision has proved to be just the opposite. There are myriad ways in which to describe a global pandemic; in this report we will characterise it as an accelerant. A force that hasn't transformed work, working and workplaces, but has accelerated changes that were already underway. These changes to behaviours and design may have otherwise taken a decade to materialise, have now become a new normal in less than a year.

We threw around terms such as 'the paperless office' and 'teleworking', always imagining in some distant, ambiguous future. Before COVID-19 came into our lives many talked about the benefits of flexible working and working from home. We imagined a future where that would be the norm, not expecting it to happen so quickly.

The concept of the workplace of the future remained just that – a concept – for so many years because we assumed that the transition to a dramatically different environment would prove disruptive to people and productivity. Looking back, we should not have been resistant to substantial change. The vast majority of our respondents had not worked remotely in any extended period of time and, despite this, the majority also said they adapted quickly to new working dynamics. It is with the benefit of some hindsight that we believe the essential workplace quality required to thrive in the years ahead will be adaptability; the ability to adapt quickly and persevere in the face of unexpected circumstances.



CORE FINDINGS

Reaching out to our clients, across disciplines and industries, allowed us to actively understand developing attitudes, concerns and challenges of returning to the workplace and the future of the office itself.

The statistics and figures in this report refer to our findings from this survey and allow us to envisage the workplace in the years to come.



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The office is an essential hub away from home distractions and offers a distinction in home and working life

60%

of people missed a change in physical environment whilst working from home with a further 83% highlighting a loss of socialising with colleagues



Deskopolitan Chateau d'Eau, Paris

Wellbeing has become a prominent factor in daily lives which employers should make a conscious effort to support and encourage

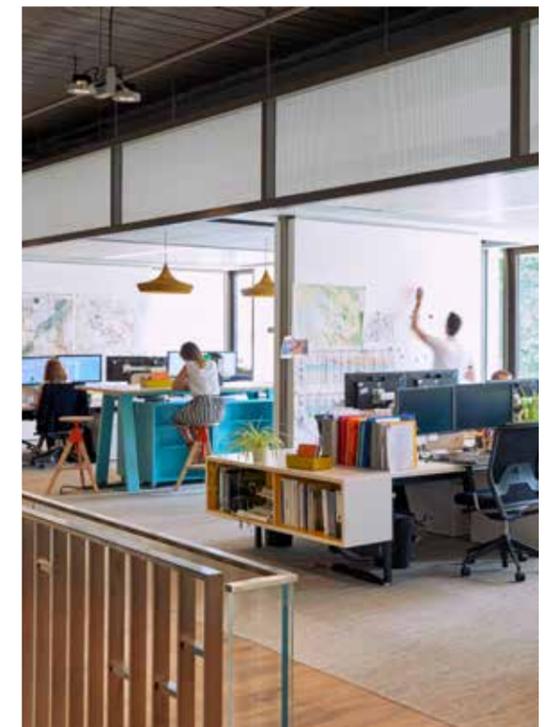
44%

believe they benefited from an opportunity to better look after their personal wellbeing

People are pursuing autonomy and a more valuable balance between their working, social and personal lives

100%

of people would like the opportunity and flexibility to establish a personal routine that works for them



Perenco, London



Coca-Cola HQ, London

Adaptability

Scenario planning or 5- to 10-year horizons were usually left for business planning exercises, but now it must be something that employees and teams consider. Contingency planning and ‘what if’ scenarios to anticipate unforeseen events will help business be more agile to cope with the world’s increasing uncertainty.

94%
of people believe
flexibility will be the most
significant change in
workplace culture



MoreySmith Studio, London

73%
of people believe the
level of trust in employees
has increased

Productivity is unpredictable

There is an entire industry and a correspondingly immense body of research into how to increase workplace productivity. The amount of time and resources spent designing offices for optimal productivity was thrown into disarray this year, as homes were certainly not designed to be productivity-boosting environments. But, rather surprisingly, people quickly found places, tools and time to be as or more productive than they were in the office. As we look forward to the workplace of tomorrow, productivity will not be a one-size-fits-all solution. Productivity will be unpredictable and progressive office spaces will allow their employees to configure spaces and resources to their most productive self, rather than imposing rules for effective working styles.



Centre Point Apartment, London

74%

find a lack of collaboration challenging whilst remote working

Work self / Home self

Working remotely has provided the unfortunate benefit of understanding the consequences of removing virtually all social interaction between employees. Companies should take the time to assess the impact on morale, culture, productivity, and quality of work. This insight will provide invaluable guidance on how the office can be re-engineered to foster the positive personal interactions that cannot happen with a remote working situation.



Private Residence, Clerkenwell



Deskopolitan Chateau d'Eau, Paris

When we look back, this period will have also ended the debate about whether you can separate your work self from your home self. And as office life returns to its next-normal, people should be encouraged to bring their whole self to work; with spaces that accommodate this duality to get the best out of their people. This will require changes in design and corresponding changes in management: moving from performance driven environments to empathy driven environments. With the key questions for managers moving from 'what have you done?' to 'how do you feel?'

70% of people said access to mental health facilities going forward was very important or fundamental



Dunhill HQ, London

People centric

In examining the reasons why people want to come back to the office, there is significant disparity in age group, lifestage, family composition and economic circumstances. One thing is clear: there is no single office design that suits everyone. Offices serve different purposes and the design satisfies different needs for different people at different times in the week.

For some, the office is an escape from the isolation of home, to a social space. For others, a quiet place of escape. Some come to put heads down and work. Other come for learning. Some find the office pressure-filled, others a place of wellbeing. The opportunity for future space design will be to cater to emerging needs, rather than employer or departmental goals: creating spaces for social interaction, recognition, learning, wellbeing, quiet or creative stimulation.



Primark International HQ, Dublin

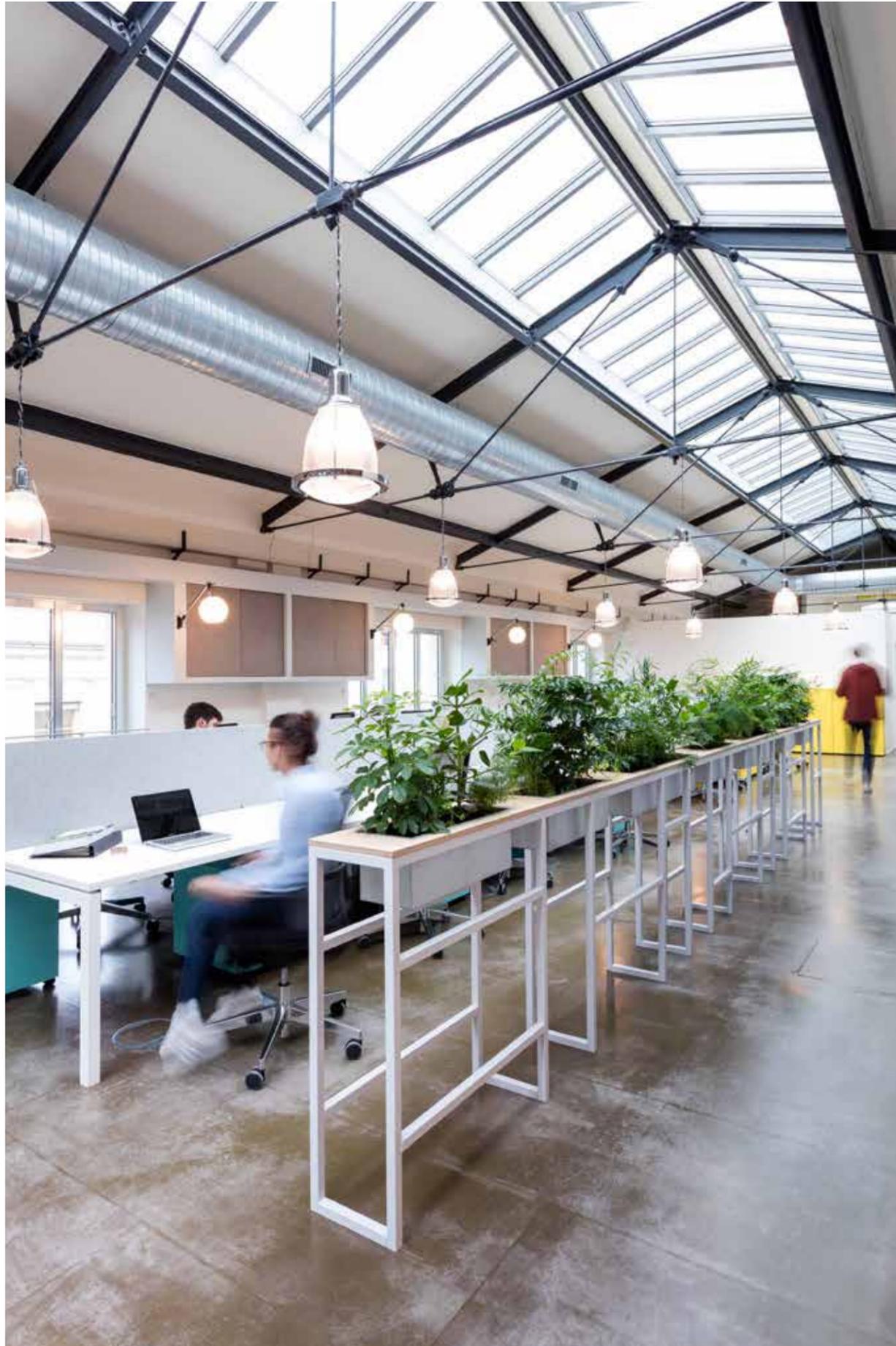
A place for pressure relief

The mental health consequences for adults and children because of health, economic and social unrest events of 2020 will be felt for years to come. It goes without saying that individuals and employers will need to take care of each other as we look ahead to the next workplace. It may also bring an end, or at least a balancing to an era of

striving and optimising performance. The unrelenting growth mindset has been an aspiration for companies and workers. We are behaving as if we have infinite physical energy and material resources. There will be a movement to anti-striving. Creating space and time for play, decompression; not always having to be optimising, learning and growing. The enhanced workplace of tomorrow will also provide space and time to relieve the pressure.

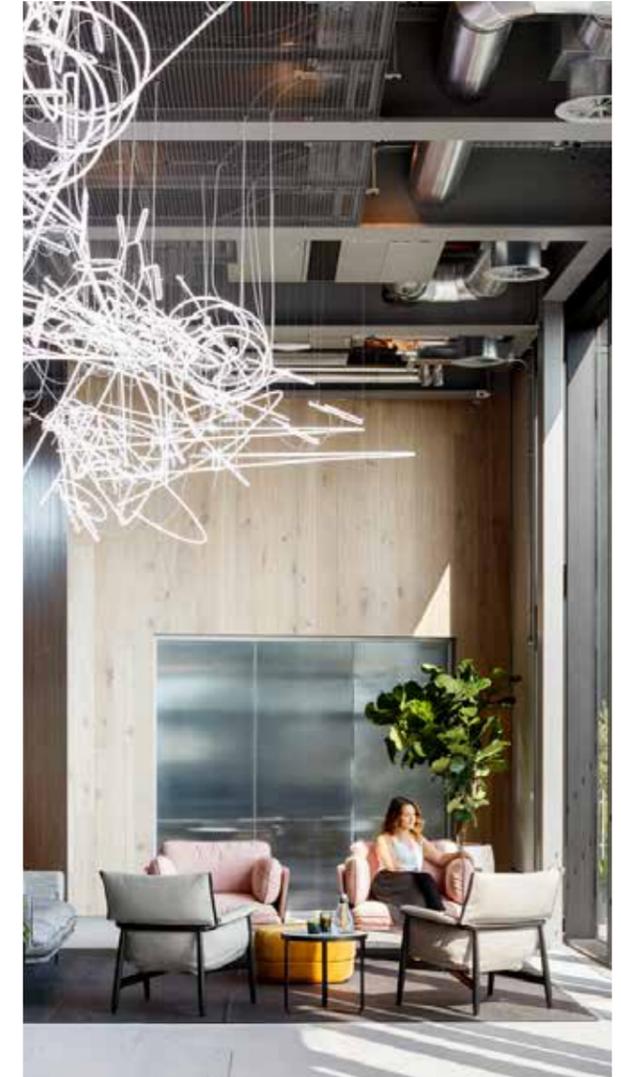
“ The desire for us to come together will be ever stronger... the excitement of collaborating and holding on to a sense of belonging and community spirit “

Linda Morey-Burrows,
Principal Director, MoreySmith



Deskopolitan Chateau d'Eau, Paris

65%
agreed meetings will
continue to rely on digital
platforms



The Post Building, London

The sensing office

In addition to a range of safety and hygiene measures, the survey points to innovation to ensure the health and peace of mind of employees, including doors that sense your approach and open without handling. These could be the first stage of an office environment that behaves more like a wearable device. If we examine the popular uses of wearables today, we may anticipate the features that an office can

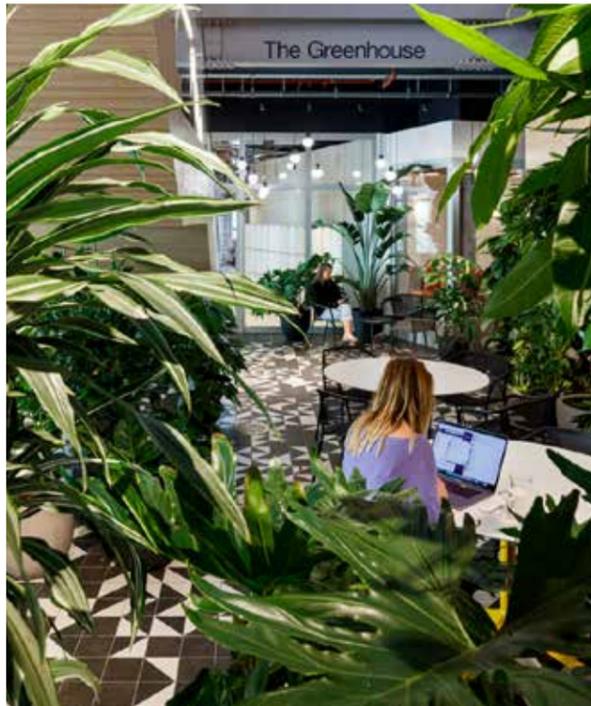
provide tomorrow. Your desk will know that you have been sitting for too long, and could suggest movement to boost energy. Your personal profile suggests your best thinking time is in the morning but ceiling sensors detect a low-point so it creates a lighting and sound environment to the release dopamine. Your blood sugar is low, and food arrives to correct it. Your activity suggests that you are in need of social interaction, the office organises a gathering with people feeling the same way.

Unexpected spaces

Working remotely may be delivering some productivity benefits that are partly due to the ability to work longer hours from time saved not commuting. Increased productivity is also the result of decreased, unexpected interruptions. There are certainly positives in this dynamic, but the absence of spontaneous conversations and ideas can have adverse long-term consequences on creativity, innovation and company culture. As we look forward to the optimal work environments, a blend of office-based and flexible working, it will be essential for companies to make room for serendipity; to provide space and time for the unexpected, chance interactions and moments that are designed to wake the imagination. Thriving companies will find ways to assess the health of the company by measuring productivity as well as measuring creativity.

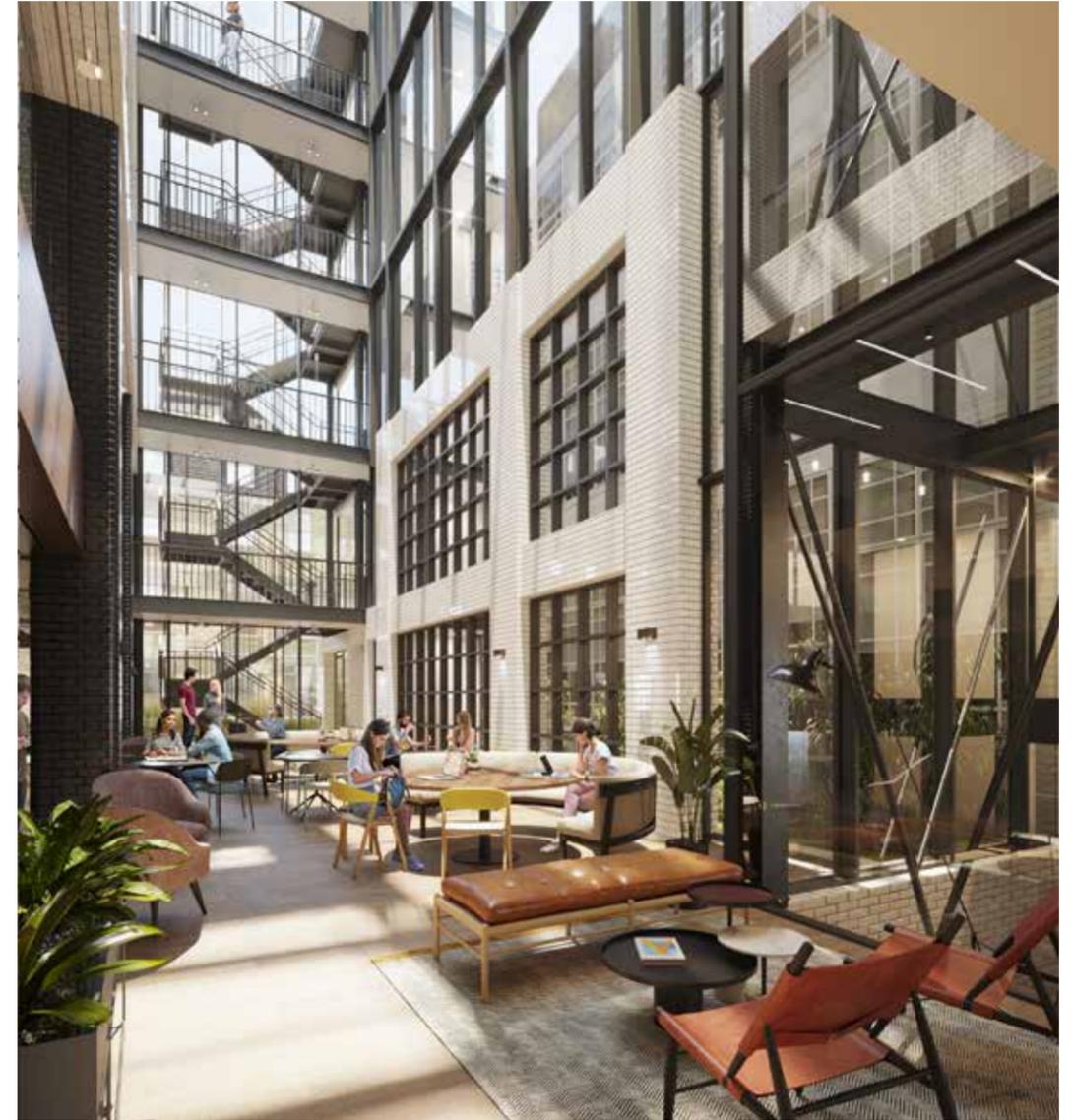


MoreySmith studio, London



The Post Building, London

Quiet areas for private calls and conversations as well as focused working will be essential for 46% upon returning to the workplace



CBRE UK HQ, London (MoreySmith CGI Image)

“ It will be essential for companies to make room for serendipity ”

Trevor Hardy
CEO of What We See



76%

of people notice a loss of company culture and interaction working from home

The slow office movement Place and purpose

We may be closing the curtain on an era where businesses aspired to speed, to growth at almost any cost and short-term view on their impacts on people and the planet. As more conscious capitalism gains ground in boardrooms, an emerging philosophy will translate into a more mindful office environment. The office of today was designed to embody the best of the urban experience. As people crave more safety, security and serenity, a rural design may become more desirable. One that embraces nature, balance, community and slowness – taking time to do the right things for people and the planet. We may find that the HQ, a single central office that many commute into will be a relic of a less thoughtful past, in favour of many healthy, hyper-local outposts.

The purpose of a company was to deliver shareholder returns is a dynamic of the past. Large and small companies are now equally focused on serving their customers, their people, communities, the planet, and shareholders. This newfound purpose is driving significant changes in company behaviour, including ethical and sustainable practices – all that enhance performance, not at the expense of it. There is growing evidence that a values-driven company performs better in financial and more human measures. We should expect office environments to follow the same trajectory: from spaces designed to improve a company's productivity, to spaces designed to enhance a company's purpose. The period ahead will bring the workplace strategy directly in line with the corporate strategy; and the office becomes the embodiment of the company's future direction, not an edifice of where it is today.



Deskopolitan Chateau d'Eau, Paris

Source code

We all know that we are what we eat. Over the last decade this belief has translated into all aspects of our lives as provenance drives an increasing number of consumption choices. People are increasingly concerned about where a product is made, who makes it and what it is made from; with growing interest

in sustainable, recycled and ethical products. This behaviour is set to extend beyond the personal and home life to the workplace. Offices that are innovative, well-designed and decorated will become less important than spaces that are thoughtfully sourced, with compelling stories about the materials, craftspeople and companies that create the stuff that surrounds us.

51% of people believe sustainable and conscious design will be more prominent going forward

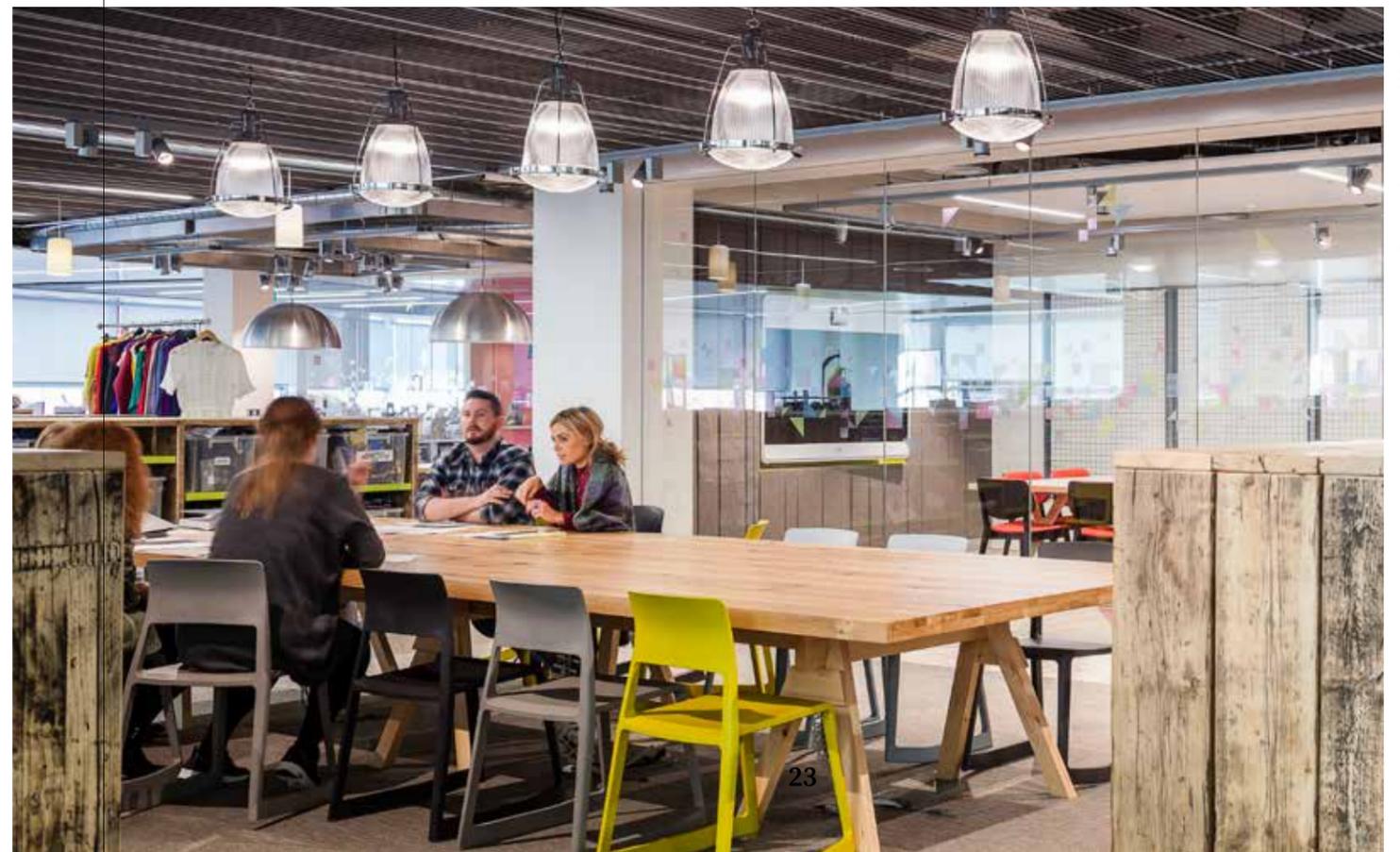
“ People still have a desire to come into a quality workplace or office, as the facilities at home vary greatly across the diversity of generations in the workforce ”

Linda Morey-Burrows,
Principal Director, MoreySmith

Representation in space

To match the efforts that many companies are taking to offset carbon and waste. There should be corresponding initiatives to offset unconscious bias in workplace design. Amongst the many cultural shifts that 2020 will bring is a greater appreciation for negative effects of unconscious bias to issues of disability, race, age, gender and

sexuality. As uncomfortable as they may be at first, companies should push for healthy debates and open conversations about the how spaces are designed, who they are designed for and who they are designed by. Exclusion of some people may not be intentional, but actively including more diversity in office design will lead to greater inclusivity, thriving workforce and a more successful company.



Primark International HQ, Dublin

CONCLUSION

Not a conclusion. A conversation

The results of the MoreySmith survey point to workers and workplaces in transition. A realisation that we have left the workplace of yesterday behind but are not yet clear on what the workplace of tomorrow will be.

Navigating such in-between times can be unsettling. We feel that in this new normal, uncertainty can fuel innovation. Insight from our research illuminates a number of areas for fresh thinking on what an office can be. This is not the time to long for

what was, but instead to imagine what will be. As our research shows, there is no single answer, no formula for success. This report provides many starting points.

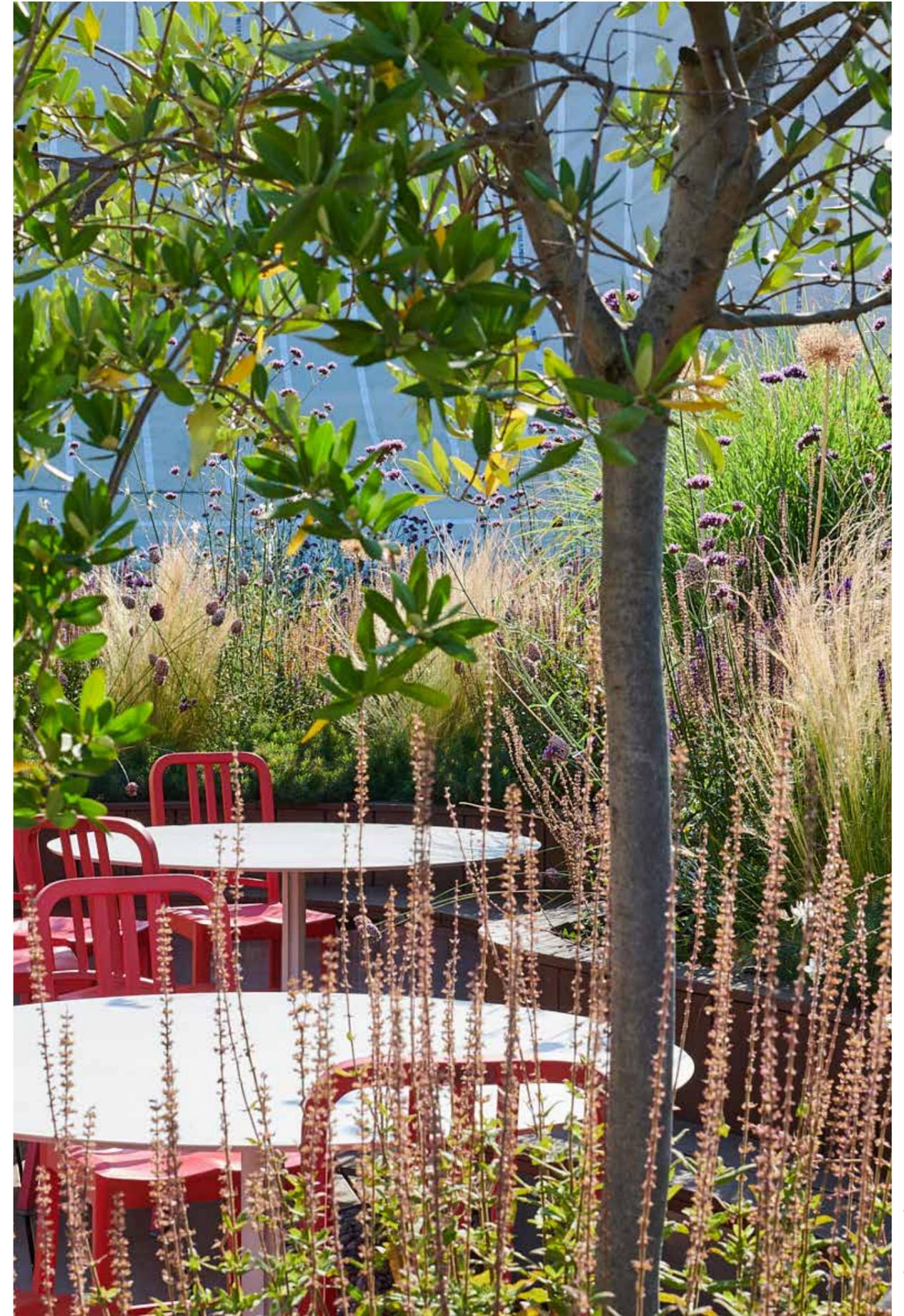
How can office design be reimagined to fuel serendipitous moments and provide sanctuaries from stress?

As companies strive to be more mindful, ethical and sustainable how can spaces lead this movement?

No conclusion, but the beginning of a conversation.

“Covid has given us the opportunity to change the way we work and get more balance back”

Anonymous survey response





MoreySmith Studio, London

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MoreySmith

24 Marshalsea Road, London, SE1 1HF
info@morey.co.uk