IA INTERIOR ARCHITECTS

A Changed World: What Happens When We Return to the Office?

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CLIENT & END-USER SURVEY DEMOGRAPHICS

RESPONDENTS

1,700	Unique Respondents
18	Industries
90%	US-Based Respondents
41	US States Represented

INDUSTRIES

44%	Professional Service
15%	Consumer Products
9%	Developer, Landlord Services
8%	Technology
7%	Financial
17%	All Others

KEY CONTRIBUTORS

Jenya Adler • Director of Workplace Transformation and Employee Experience at a Fortune 100 company • Purchase, NY

Jeremy Moultrup • Co-Founder & CEO of Pangeam, Inc., a workplace intelligence and analytics platform • San Francisco, CA

Raj Gupta • Executive Chairman of ESD, a global consulting and engineering firm • Chicago, IL

Sarah Brophy • Design Director and Principal at IA Interior Architects • Boston, MA

Erik Lucken • Moderator, Strategy Director at IA Interior Architects • Minneapolis, MN

Tish Kruse • Senior Director of Strategy and Principal at IA Interior Architects - Chicago, IL

Holly Jeffers • Strategist and Associate at IA Interior Architects - Chicago, IL

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OVERVIEW

A Changed World: What Happens When We Return to the Office?

IA conducted a survey in early April and held a panel discussion based on the results of that survey in mid-April. The panelists included industry leaders, listed on the previous page, as contributors with key insights into the dynamic discussion. This document reports on the results of this survey, thoughtful excerpts from the panel discussion, and IA's near-term recommendations to address the changing workplace.

We are in the midst of one of the largest social experiments of the modern era. With an estimated _57% of employed Americans_ now working remotely, COVID-19 has shifted the prevailing work paradigm of millions of people almost overnight.

Office restrictions are being lifted right now in a number of states. Simultaneously, the workplace is being described as "one of the most important arenas for epidemic prevention."

As individuals begin returning to the workplace, employers will need to develop short- and long-term practices and protocols to promote safe working environments but also preserve organizational culture and continued innovation. Users will be expected to quickly learn new and unfamiliar workplace etiquette, just as they have had to adopt a new set of remote work behaviors in the weeks prior.

To help facilitate this transition, IA Interior Architects (IA) developed a client and end-user survey to quantify critical areas of concern and consulted with industry leaders to explain how facilities management and workplace experience personnel can best address these concerns.

NEAR TERM FINDINGS

What should organizations be doing in the near term to make employees feel comfortable and safe returning to the office?

▪ Respondents largely prioritized a phased re-entry as the most important contributor to establishing a safe and comfortable office—63% of respondents ranked this among their top three concerns.

▪ Only 20% of respondents ranked evaluating seated distance as a near-term priority.

▪ *Rescinding unassigned or hoteling environments was least likely to be ranked among the top three concerns.*

For many, the workplace is where the majority of time outside the home is spent. In the post COVID-19 workplace, this may lead to similar levels of stress and anxiety that experts already see in the field of healthcare. It is reasonable to expect that, as office workers return to the office for sustained periods of time, there will be some degree of vigilance-related anxiety. Supporting this notion, recent Gallup Polls show that 45% of employed Americans surveyed report feeling moderately-to-very concerned about being exposed to coronavirus at their place of work.

63%
1 Addressing a phased re-entry into the work environment.

54%
2 Establishing enhanced and increased cleaning frequency.

51%
3 Awarding employees the flexibility to work from home on a regular basis.

43%
4 Defining social distancing protocols for the short term.

40%
5 Offering a grace period for returning to the office.

Note: Percentage each response appeared in the top 3 rankings

SURVEY RESPONSES

Respondents ranked an enhanced focus on cleaning as the number one near term priority.

"China's workforce is returning, but they are getting temperature checks before building entry and wearing masks. Will our culture be able to mandate that or consistently adopt that preventative measure in order to reopen the workplace?"

"Help employees understand where in the office other than their desk they can work - assuming there is Wi-Fi support and variety of work spaces."

"**Address culture around sick leave and actually taking time off** (with layoffs people are going to work to prove themselves at risk to themselves and others)."

"I think working from home and coming into the office infrequently is going to be the new normal, **and the responsible thing to do as citizens to protect our most vulnerable populations until a vaccine is created. Nothing is more important than people's lives.**"

Now, more than any time in recent memory, it is critical that employers assuage the work environment-related fears of their teams.

Accordingly, survey results show that the majority of respondents' near-term concerns were centered around work from home and determining the reentry process. In fact, 63% of respondents were likely to name addressing a phased reentry into the work environment as one of their top three concerns. In addition, when asked to supply any additional comments relating to near-term strategies their organizations should embrace, respondents mentioned reentry or working from home 50% of the time, making them by far the most prominent topics. "We need to be focusing on the human experience and leading with empathy." says Sarah Brophy, a Design Director and principal at IA's Boston office. "How can we make these changes feel a little more intentional to further educate people about how they should be moving through space?"

One of the more unexpected survey results was that *a reevaluation of hoteling and unassigned seating* was least likely to be ranked a near-term priority for teams returning to the workplace. While the survey did not take into account that some workplaces may not have hoteling spaces to begin with, Erik Lucken (IA Interior Architect's Strategy Director) thinks that the relatively low numbers may be attributed to users taking the action as a given. "Increasing the space between people and decreasing potential contact with surfaces, particularly those others are in contact with, are both foundational strategies to prevent the spread of the coronavirus."

While some people may be uncomfortable with shared space for some time to come, Erik Lucken believes that well-communicated cleaning protocols will enable teams to look past many of their initial concerns about common spaces, amenity spaces, and hoteling and unassigned desks. Jenya Adler, Director of Workplace Transformation and Employee Experience at a Fortune 100 company, agrees. "I think a big part of this is going to be communication.

> "
>
> I do, however, think there will be a shift in how we use space. We are looking at having enhanced circulation and I think we're going to see collaborative areas playing a big role, as these social hubs are going to be so important when making a robust workplace culture.
>
> **JENYA ADLER**
>
> "

Communicating what's going on, what we're doing at our respective workplaces to create a safer environment...we need to make those visible to employees and also let them know that it's OK to acknowledge the anxieties around this and offer support when they're there." A text analysis of survey responses would suggest that users are in agreement, as "communication" was the second-most-common subject of user-provided comments (21%).

One key area that panelists found underrepresented in the survey results was the topic of technology, and how it might play into the change management process. Text analysis of survey responses shows that only 8.1% of respondents named "technology" as a key, short-term solution. Jeremy Moultrup, Co-Founder and CEO of Pangeam, Inc (a workplace intelligence and analytics platform headquartered in San Francisco), thinks that users and the industry should be expecting more from apps and workplace strategy-related technology. "Organizational intelligence and technology will be critical in how and when we go back. How we manage the traffic density, collaboration, and shared spaces...we need to give people a sense of security but also the sense that they have a choice of when they go back." He believes that technology will have a three-fold role in the initial return to the office, serving as a communication tool to aid in change management, aiding data collection that informs long-term solutions, and managing user traffic and space use.

Similarly, contributor Raj Gupta, Executive Chairman at ESD, was surprised that questions surrounding air quality were not more prevalent in the survey results. While establishing enhanced and increased cleaning frequency was the second-most highly ranked priority option among all users surveyed, and could have accounted for some air quality concerns, less than 2% of respondents named HVAC and related systems as a high-ranking priority. He attributes this to visibility. "Understanding that cleaning includes important elements such as wiping down desks and door handles, building systems can impact cleanliness in ways we don't necessarily see," he explains.

> Providing staff with some control over their 'existence' in the workplace—for example allowing face masks and obsessive cleaning—will be key. Establishing a grace period during which staff can decide when to return will also be key.
>
> **SURVEY RESPONSE**

Nonetheless, with research indicating that the management of air humidity of indoor environments can reduce virus "float time" and improve respiratory immune efficiency, MEP solutions should be prioritized by facilities teams.

"There are some things that we can do with our building infrastructure and things that we should be doing in the short term, before we come back to the buildings," says Gupta. "Increasing the amount of outside air ventilation that we bring into the space, for example, will dilute the concentration of contaminants and help stem the spread of diseases." He goes on to identify the use of portable HEPA filters, the reassessment of demand control ventilation strategies, and general HVAC system maintenance as other short-term solutions that should be more highly prioritized.

Overwhelmingly, the data collected illustrates that users are most concerned with how phased reentry will be addressed in their organization's short-term strategies. It will be important for organizations to address user concerns, and communicate clearly and often about steps being taken to reduce risk. ▪

NEAR TERM RECOMMENDATIONS

1 Clearly communicate work environment changes and provide employees with the **information and training** needed to adapt.

2 Prepare the workplace to **facilitate work during the transition** and maintain a way to **capture feedback** for continued improvement.
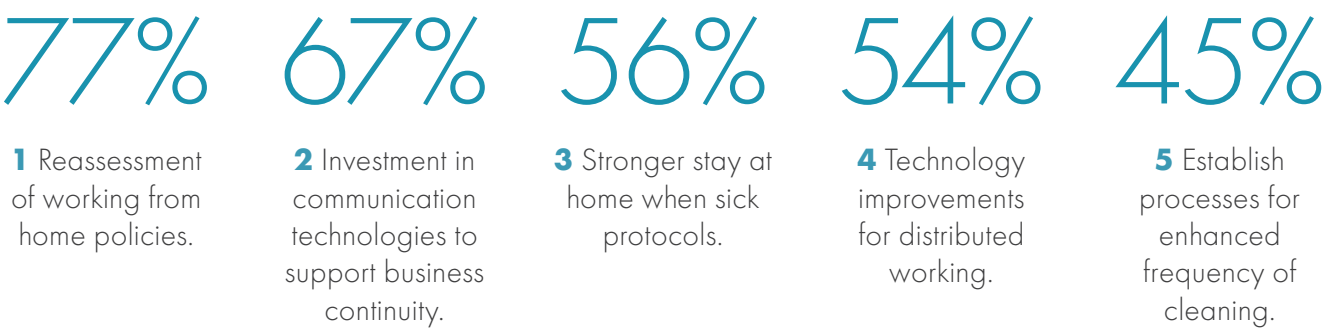
3 Allow users the **flexibility to work from home** during the transition period.

LONG TERM FINDINGS

Considering the longer term, in what ways do we see the workplace changing? How will employee behaviors change?

▪ *Less space devoted to group amenities* was the change least expected to occur over the long term by a 20% margin.

▪ The most-expected change was the *reassessment of working from home.* Survey respondents ranked it among their top three predictions for the workplace 77% of the time.

▪ Respondents in finance were more likely to expect their workplace to trend away from free address back to assigned seats than any other group (it was the seventh most-expected change.) Technology and developer/landlord services were least likely at 11th.

77%
1 Reassessment of working from home policies.

67%
2 Investment in communication technologies to support business continuity.

56%
3 Stronger stay at home when sick protocols.

54%
4 Technology improvements for distributed working.

45%
5 Establish processes for enhanced frequency of cleaning.

Note: Percentage each response appeared in the top 3 rankings

SURVEY RESPONSES

Many comments focused on the role of the office going forward.

"We already have good technology and tools in place to work from home anytime. **It is more about teaching employees on how to use these tools, how to keep connected with the team.** For people leaders they need to learn how to manage remotely."

"I think we're going to be able to prove that working from home can be productive and healthy for both the employees and the organization. **And the organization should shift to allow and enable this more seamlessly.** This won't be the last biological or natural disaster."

"Just about everything that can be virtualized, will be virtualized. Some not for the better. **This will highlight the value of personal interactions.**"

Some comments emphasized that communications and trust between employer and employee is key.

"Much more communication to employees on safety, health, and security. This could be done in the form of regular training through on-line mandatory courses and in-house training too. **For the longer term all employees must have a team mindset for all new protocols.**"

"**Trust** will be important for employees as well as employers."

Considering the long-term plans among organizations of different industries highlights the diversity in how user groups expect the workplace to change. Whereas most of the survey results show relative parity between those industries surveyed in how they experience remote work and short-term planning, looking at long-term plans unveiled a much different pattern. For example, the fourth most ranked option among technology firms was *establishing cleaning processes* for enhanced frequency of cleaning. The average among all industries, however, was seventh. Similarly, those in the category of development/landlord services were 12.34%—25.82% more likely to rank reassessment of working from home first among expected long-term changes compared to those in finance, professional services, or technology.

Sarah Brophy expects that the process will have to be continuously monitored. "From an interior design and architecture perspective, we will be studying how teams work together, what that team's strategy looks like, and how that impacts organizational design and workplace design," she explains. "I'm expecting to see a number of organizations shift to unassigned seating to capitalize on the efficient use of real estate that will only become more imperative as organizations transition back to the office." Now, at least, it seems that 41% of users surveyed expect the trend towards unassigned seating to regress as a result of COVID-19.

Technology as related to business operations and communications was another key long term trend identified in the survey results. Says Jenya Adler, "teams or leaders that thought they had to have their team right in front of them in order for them to be effective or feel that their team was productive have probably had that turned on its head a bit right now." Users appear keenly aware of this as communication and technology improvements accounted for 28.5% of feedback submitted by survey respondents, and categorize the 2nd and 4th most-commonly-predicted long-term changes, respectively.

> We need to give people the option to work where they feel most comfortable and productive right now. There are many different types of workers and it's important to give them the flexibility they need. So for now, while we are getting back to the office, why not let them choose? In the meantime we'll make it our job to remind them that the office is an amazing engagement hub that creates incredible buzz and energy.

JEREMY MOULTRUP

Overwhelmingly, the data collected illustrates that users are expecting remote work to be more prevalent in their long-term futures. **This is not to say that most users will necessarily be looking to work from home as often as possible when workplaces reopen, however.** National polls show public sentiment toward working from home [wavering significantly from week-to-week](#) as offices remain closed in most states. Over the course of this survey, only 56% of respondents indicated positive sentiment towards their new remote work arrangements (as related to individual work). Negative comments often cite decreased focus, productivity, and a lack of human interaction among top concerns.

What this means for the future of work will be difficult to determine, as sentiment is likely to change over time, as well as from user-to-user and industry-to-industry. One point on which all of the data agrees is that having an intimate understanding of user groups' work preferences will be key in managing the transition back to the workplace. ▪

LONG TERM RECOMMENDATIONS

1   Capture **lessons learned during the near term** to determine what must be adopted in the long term.

2   Prioritize and focus on the **cultivation of trust** between employer and employees.

3   Invest in technology that supports the **health and wellness** of the workforce.
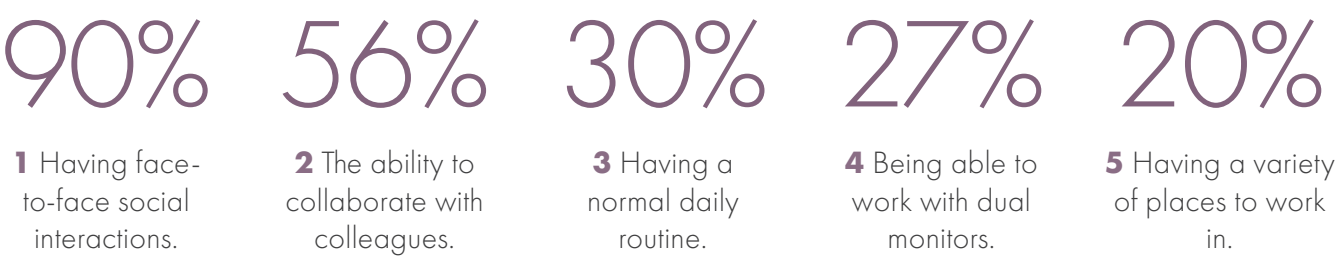

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THE WORKING FROM HOME EXPERIENCE

While working from home, what do we miss most about being in an office and what have we learned from being at home?

▪ Face-to-face interaction (90%) and the ability to collaborate (56%) were the aspects of the workplace most likely to be missed.

▪ 62% of those surveyed reacted favorably to the remote work environment. Of those, 84% found the transition to be easy or enjoyable.

▪ 61% of respondents who had negative sentiment about transitioning to remote work reported encountering barriers to effective communication. Only 27% cited technological barriers.

▪ Text analysis of write-in answers shows that 56% of users had positive sentiment to their ability to individual work at home. 62% of users, meanwhile, had positive sentiment towards collaborative work from home.

▪ The most common surprise surrounding individual work (negative or positive) reported by respondents was tied to increased focus and productivity (27%). Some respondents felt working from home improved their ability to focus on individual work, while others saw a negative impact.

90%
1 Having face-to-face social interactions.

56%
2 The ability to collaborate with colleagues.

30%
3 Having a normal daily routine.

27%
4 Being able to work with dual monitors.

20%
5 Having a variety of places to work in.

100 — 100
80 · 80
60 · 60
40 · 40
20 · 20
00 — 00

1 2 3 4 5

Note: Percentage each response appeared in the top 3 rankings

> The modern employee, unfortunately, has been evolving faster than we can really design and build space for. But the one thing that really remains constant is their need for flexibility and variety in their office, which really means people want control to create their own workspace. I think agile, activity-based working is the future, we just need to provide technology that empowers people for the open office.
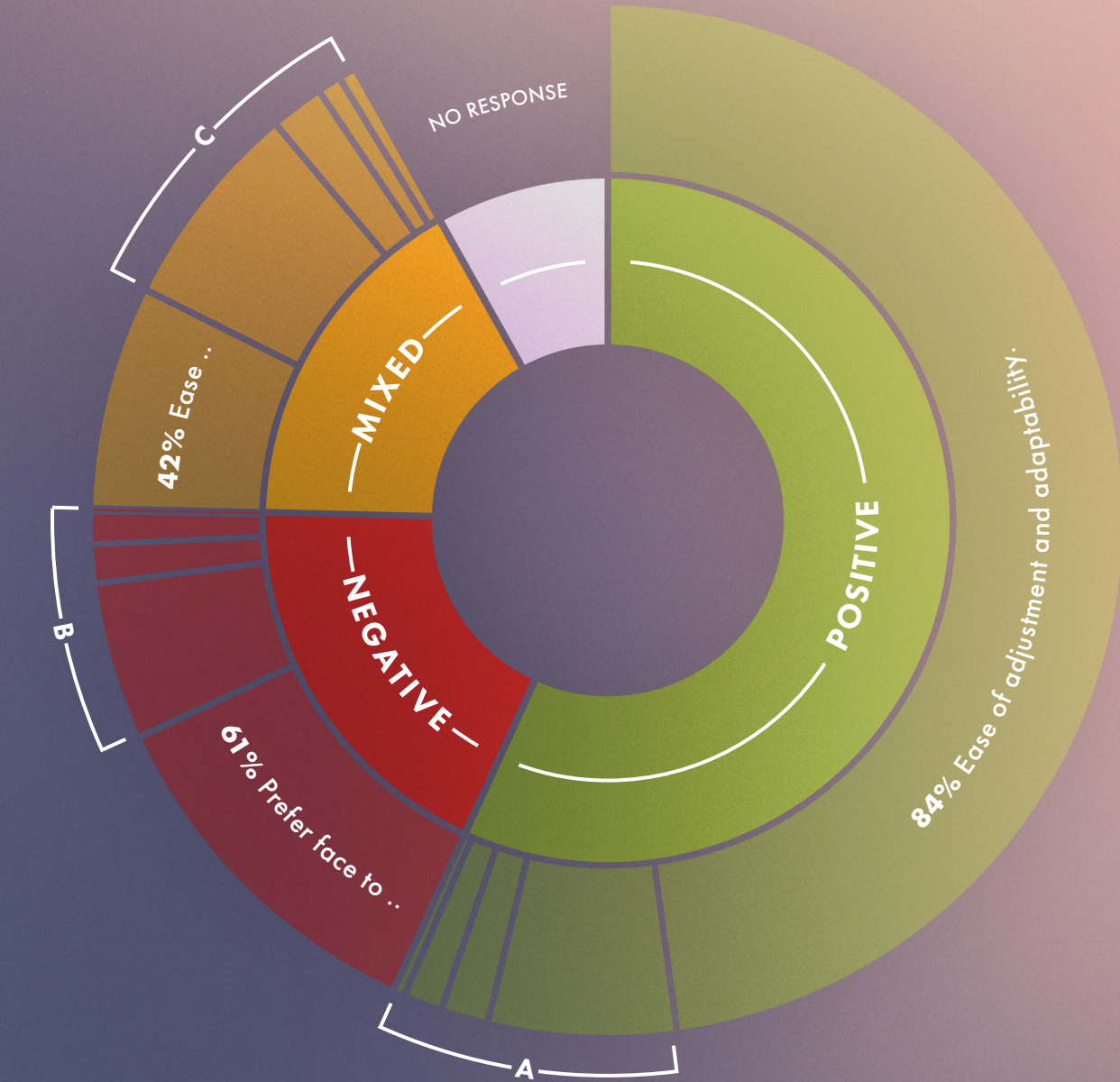>
> **JEREMY MOULTRUP**

Of the survey's findings, perhaps none are more conclusive than the fact that face-to-face collaboration is sorely missed by most users. When asked, "what has surprised you most about your ability to do collaborative work form home," 60.8% of those with negative overall sentiment described face-to-face communication as a common concern. Ninety percent of survey takers ranked face-to-face communication among their top-3 most-missed features of office work.

As Jenya Adler explains, "people are missing that sense of connection…I think going through this whole pandemic together has been, for better or worse, a form of bonding forcing people to interact with colleagues differently."

While personal interactions and their impact on communication are clearly missed, it is difficult to ascertain from the survey results whether or not users viewed this as having a net positive or negative effect on their productivity. Eleven percent of respondent comments specifically mentioned missing face-to-face communication. That being said, 56% of users reported positive overall sentiment towards their individual remote work, but even more (by 5.74%) had positive sentiment towards collaborative remote work. User comments received on the survey varied widely. In addition to offering employees partial work from home schedules in the near- and long-term, these results tell us that providing users with a wide variety of spaces and giving employees the freedom (and training) they need to collaborate in the way that best matches their individual workstyles, as well as the larger group workstyle, could provide the key.

While many mentioned enjoying the social experience afforded to them by tools like video chat and instant messaging, many others mentioned missing "the stimulation of other people being around," as one respondent described it. Clearly, users have a wide variety of preferences and may even be motivated more by their social wellbeing than any feeling of improved collaboration that a face-to-face setting provides.

COLLABORATIVE WORK FROM HOME FINDINGS

POSITIVE SENTIMENT		**NEGATIVE SENTIMENT**		**MIXED SENTIMENT**	
84%	Ease of Adjustment, and Adaptability	**61%**	Face to Face Preference	**42%**	Ease of Adjustment, and Adaptability
10%	Productivity, and Engagement	**27%**	Technology, Learning	**40%**	Face to Face Preference
		7%	Difficulty of Adjustment and adaptability	**10%**	Technology, Learning
A 3%	Face to Face Preference	**B**		**C 5%**	Productivity and Engagement
2%	Technology, Learning	**6%**	Increased Meetings		
1%	Increased Meetings	**11%**	Productivity and Engagement	**6%**	Increased Meetings

INDIVIDUAL WORK FROM HOME FINDINGS

POSITIVE SENTIMENT		NEGATIVE SENTIMENT		MIXED SENTIMENT	
30%	Productivity	23%	Work Life Balance	20%	Productivity
19%	Focus	19%	Interaction, Isolation	18%	Work Life Balance
18%	Adjustment, Adaptability	18%	Focus	15%	Interaction, Isolation
15%	Work Life Balance	11%	Productivity	14%	Focus
11%	Technology	11%	Technology	12%	Outside Effects
4%	Interaction, Isolation	8%	Outside Effects	11%	Adjustment, Adaptability
2%	Outside Effects	7%	Adjustment, Adaptability	8%	Technology
1%	Ergonomics	2%	Ergonomics	3%	Ergonomics

In addition to offering partial work from home schedules in the near-and long-term, these results tell us that providing users with a wide variety of spaces and giving employees the freedom (and training) they need to collaborate in the way that best matches their individual workstyles, as well as their team's, could provide the key. "I think this time reinforces the need for an activity-based plan," says Jeremy Moultrup. "Our research shows that most of the open office frustration really only comes down to the employees having a lack of control over their space." IA's Jenya Adler agrees, and imagines a variety of spaces being critical to both short-term and long-term success. "I wouldn't be surprised if we saw an up-tick in people meeting and collaborating outside of conference rooms in perhaps a non-traditional area. Maybe they'll be sitting in the café, maybe they will be sitting in the pantry, but I imagine people will feel more comfortable in open spaces, at least in the beginning." ■

LEARNING FROM WORKING FROM HOME

1 Provide support and guidelines to facilitate **work/life balance**, including technologies to support **seamless working**.

2 Continue to offer employees the **choice** to work from home within a framework that **supports the business**.

3 Provide users with a **variety of spaces** in the office so that they may control their environment and maximize productivity for their work style.

ADDITIONAL SURVEY RESPONSES

Comments convey that many people miss human interaction and collaboration, while most were pleasantly surprised that they can still collaborate.

"Connection, energy, and culture of being in the same place."

"Spur of the moment socialization."

"Jokes and updates on other people that you get from working together in person."

"Adult Time: time away from my lovely children who I love dearly but long for adult time!"

"My work friends!"

"The stimulation of other people being around."

Additionally, comments were made regarding other aspects of the work environment that people miss.

"A place for employees to call home."

"Feeling of security and stability."

"Ergonomic Equipment, including sit-to-stand desk, chair, dual monitors on arms."

"Not being tethered to a desk for all meetings...I miss leaving the 'work space' for other venues."

"Level of physical activity throughout the day."

"Leaving the house."

Photography © Robert Benson

CONCLUSION

A Changed World: The Conversation is Ongoing as We Continue to Learn.

On April 17th, the White House announced the guidelines for Opening up America Again. The plan consists of three phases to return the working economy. The first phase for employers is to continue to encourage tele-work, and if possible, return to work in phases. It advises closing common areas where personnel are likely to congregate and interact, or enforce strict social distancing protocols. The second stage is similar with the addition of allowing non-essential travel. The final step is resuming unrestricted staffing of work sites.

While there is no timeline associated with the plan, it currently appears as though states will drive the timing based on the criteria established for these phases to be deployed. The message for employers and employees is, for many of us, that working from home is going to stay our work week routine for the near term.

As we continue planning and preparing the workplace for the return of its workforce, we will continue to learn from the widespread working from home experience. The ability to work from home in the past was an attractive option many employers offered. Now it is an essential practice of business continuity for everyone. With this new reality and the lessons learned from the recent working from home experience, employers will be seeking the best ways to invest in the resources needed to keep work flowing and their employees productive and engaged.

While near term accommodations are adopted in our office space, we will need to track what is working, what is not, and what could be improved. Communication will be more critical than ever, as employees seek to retain connectedness, maintain productivity, and stay well. As this is a prime time to innovate, we will need to keep abreast of technology improvements as they become available to explore further how they can facilitate all ways of working, as well as the safety of our environments.

We find ourselves in a very fluid situation, and companies will need to take the time to discover holistically what their best path forward looks like in alignment with their business operations, corporate culture, and employee wellbeing.

We at IA are committed to keeping the conversation going and share our learnings as we work together with our clients and industry partners to define the new normal.

WEBINAR

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