

IA SPACE MATRIX
REDEFINING GLOBAL DESIGN & DELIVERY

Returning to the Office: A Global Perspective

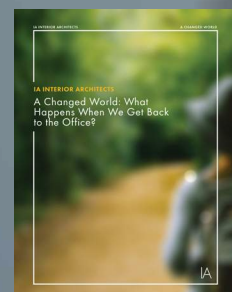
SURVEY DEMOGRAPHICS

IA INTERIOR ARCHITECTS

Unique Respondents	1700
US-Based Respondents	90%
US States Represented	41
Industries	18
Professional Service	44%
Financial	17%
Consumer Products	15%
Developer	9%
Landlord Services	8%
Technology	7%
All Others	17%

SPACE MATRIX

Unique Respondents	532
Asia-Based Respondents	88%
Asian Countries Represented	8
Industries	18
Professional Service	38%
Technology	17%
Consumer Products	7%
Developer & Landlord Services	8%
Advertising & Communications	6%
Financial	5%
All Others	18%



IA Interior Architects
May 06 2020

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



Space Matrix
April 2020

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

ABOUT THE IA SPACE MATRIX PARTNERSHIP

In early 2020, IA and SM, headquartered in Singapore, officially formed a partnership with a shared platform, powerfully strengthening both practices in the Americas and Asia. Successful

collaborations between joint teams in the U.S., Singapore, and China had already proved the partnerships' prowess and provided a glimpse of its future.

OVERVIEW

Returning to the Office: A Global Perspective

The effort to confront the COVID-19 pandemic on a global scale has driven one of the great social experiments of modern times. Social distancing and a shift from office to home of the traditional work paradigm has affected millions of people worldwide, reframing business and social interaction amid a devastated world economy and human tragedy. As restrictions begin to lift, what will a return to the office—arguably “one of the most important arenas for epidemic prevention”—look like?

What must employers do to ensure safe environments while preserving organizational culture and continued innovation? How will employees embrace the workplace; what will be their expectations? What role will remote work play going forward, and how successful was it during the lock-down?

To help answer these questions and facilitate the awaited transition, in early April, IA Interior Architects (IA) developed and issued a client and end-user survey to quantify critical areas of concern, and understand how facilities management and

workplace experience personnel might best meet the new workplace challenges. Approximately two weeks after the release of IA’s findings in a white paper (complemented by a recorded panel discussion), Space Matrix (SM) issued the same survey, with the addition of minor cultural nuances, to its clients and end-users in Asia. The results of the two surveys taken together represent a data gathering effort across much of the globe.

The results of the surveys are compared in this document, with a focus on near term and long term findings. Despite cultural differences between survey participants and contrary to expectations, the results were surprisingly similar for most questions, suggesting that both the human response to work during the pandemic and the reaction to an awaited return to the office are more universal than anticipated. During collaboration on the findings, a theme of common values emerged, in spite of differing cultures. Connected across the globe by similarities in response, we are often fearful, excited, and inspired by many of the same factors.

NEAR TERM FINDINGS

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

The responses made it clear that an organization's ultimate goal will be the creation of a safe haven for employees. Employers are acutely aware of the importance of their messaging around care for the physiological and psychological health of the workforce.

In the near term the key component will be flexibility. Respondents want flexibility when returning to the office and the choice to work remotely as an approved option. The third ranked response expresses the value

of that sentiment. Based on respondents' comments, people found working from home to be productive, providing greater control of work-life balance, eliminating commute time, and offering an option that was not always offered before the pandemic.

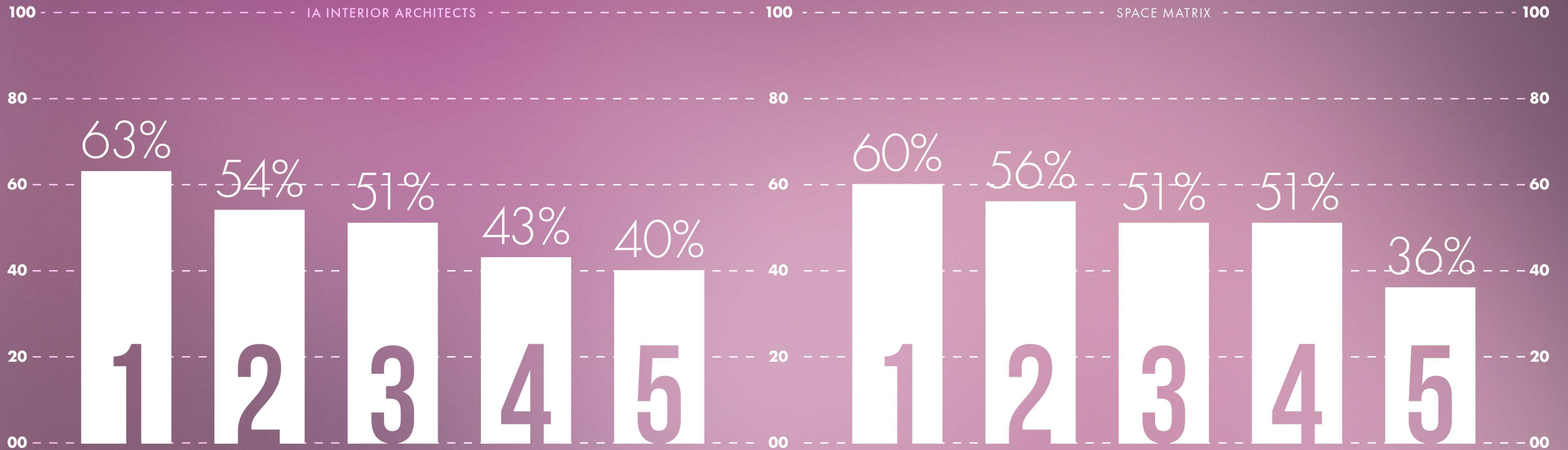
A close second in importance, hygiene is a major concern; the more visible the hygienic efforts, the better. Several research papers, including a presentation from IA, propose that cleaning crews be visible and active throughout the workday, rather

Top Five Results IA

1(63%) Addressing a phased re-entry into the work environment. 2(54%) Establishing enhanced and increased cleaning frequency. 3(51%) Awarding employees the flexibility to work from home on a regular basis. 4(43%) Defining social distancing protocols for the short term. 5(40%) Offering a grace period for returning to the office.

Top Five Results SM

1(60%) Addressing a phased re-entry into the work environment. 2(56%) Establishing enhanced and increased cleaning frequency. 3(51%) Awarding employees the flexibility to work from home on a regular basis. 4(51%) Defining social distancing protocols for the short term. 5(36%) Offering a grace period for returning to the office.





Space Matrix: Peak Reinsurance, Hong Kong

than a behind-the-scenes activity. A cleaning help desk, similar to a tech help desk, is another attractive option.

Clients are rethinking desk sharing, how to maintain physical distancing for staff in the near term, and discussing a mix of safety measures. The critical action will be to take informed and logical steps in the near term and begin planning for the long term as lessons learned are vetted and applied to new thinking.

Overall, there is a desire to gradually return to the office, rather than rush back, in order to test behaviors and handle any health issues that might arise. The

fifth ranked response speaks to this sentiment by allowing a grace period for the return. Employees may be balancing numerous considerations—childcare challenges and trepidation about public transportation, among other issues—that require an eased return to the office. These connected responses provide a framework for recommended steps that will reduce anxiety. ■

NEAR TERM RECOMMENDATIONS

- 1 Be explicit in communications around **processes and protocols** to prepare and maintain a healthy workspace through **enhanced cleaning, physical distancing, and working at home when sick**.
- 2 Make sure **hand-washing sanitation stations** are **clearly visible** and **abundantly used** throughout the day.
- 3 Lead with **empathy and provide flexibility** so that people feel they have a little leeway.
- 4 Keep work options flexible so that employees have a **choice** when they return, aligned with organizational efforts to **ramp up technology** and **review physical capacities** in the office.
- 5 Engage staff by **establishing feedback loops** to monitor mental health, work-life balance, and a sense of belonging.

LONG TERM FINDINGS

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

For the long term, which looks beyond two years (the time estimated by the World Health Organization to develop a vaccine), organizations recognize that the old ways are not coming back. The highest ranked response favored reassessing company policies or creating a policy around working from home as an option going forward. Many companies pre-COVID-19 either expected a daily presence at the office or had not explicitly established a policy giving permission and outlining guidance about working

from home. Employees want to be able to enjoy the continued flexibility of that option.

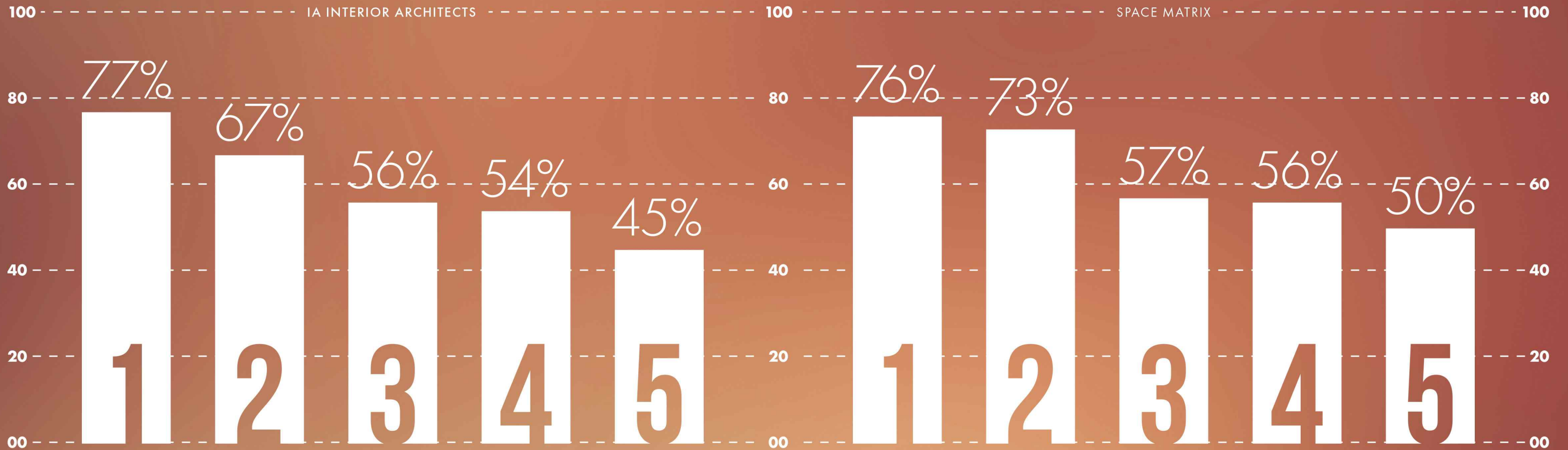
For both the IA and SM survey, nearly 60% of respondents' comments were positive about their ability to work individually and collaboratively from home. A majority cited greater productivity and the capacity to do focused work, with a surprising ease of adjustment to working remotely. However, respondents' feedback on the need for greater investment in communication technologies for

Top Five Results IA

- 1(77%) Reassessment of working from home policies.
- 2(67%) Investment in communication technologies to support business continuity.
- 3(56%) Stronger stay at home when sick protocols.
- 4(54%) Technology improvements for distributed working.
- 5(45%) Establish processes for enhanced frequency of cleaning.

Top Five Results SM

- 1(76%) Reassessment of working from home policies.
- 2(73%) Investment in communication technologies to support business continuity.
- 3(57%) Emphasis on better air quality.
- 4(56%) Stronger stay at home when sick protocols.
- 5(50%) Technology improvements for distributed working.





distributed work revealed two issues. First, there is a disparity in connectivity due to inadequate technology infrastructures. Second, not everyone had adequate tools to work from home. To maintain a productive and flexible work routine, organizations need to equip employees with the right digital tools to work together remotely.

The responses around employee health and cleaning the office more thoroughly were consistent for SM and IA. In addition, employers need to be explicit and vigilant about addressing sick leave policies to ensure healthy work environments; they should encourage employees to work from home if feeling unwell, rather than use a sick day. In the U.S., where limited paid sick days are the rule, this is of particular concern. If employees are able to work from home with a sniffle or cough, they can remain productive without risk of infecting their teammates or using sick time.

Since the work from home experience shows positive results, questioning the value of the workplace is logical. Some companies say that their workforce can continue working from home as long as they want to, although staff will still need to come to the office to meet and work with others. The value of the workplace will remain high.

According to a recent survey done in Singapore, nine out of 10 people want to continue working from home. Flexibility and cost savings were among the perks cited. Of those surveyed, only 15% said they wanted to continue working from home all of the time, while the rest preferred varying amounts of time working from home.

"I do miss interacting with colleagues face to face. But I also like the flexibility that working from home offers. A balance of both would be good," said Mr. Singh, in an excerpt from *The Straits Times*, a Singapore newspaper that on May, 24, 2020, reported on a survey of 9,000 respondents representing almost 90 companies. This ongoing survey by EngageRocket, a software-as-a-service platform that automates employee feedback and analytics, began on April 13



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MR. SINGH, THE STRAITS TIMES



and was conducted in partnership with the Singapore Human Resources Institute and the Institute for Human Resource Professionals.

For many organizations, the workplace will remain a useful tool and location for fostering and reinforcing organizational culture and driving innovation. Professor Ron Friedman, Ph.D., an award-winning social psychologist who specializes in human motivation and behavioral science, offers insight on the conditions that help us work more effectively. In his book, *The Best Place to Work*, he describes the workplace as a “physical representation of the organizational culture akin to an organization’s personality.”

The change in peoples’ expectations about the workplace is making companies take a second look at their workplace strategies. Questions pivot around what draws employees to the workplace. We believe the office will be a destination for the creative mind and a place for socializing and informal knowledge sharing. Even when an exchange of information is not directly connected to the task at hand, it is still of immense value. The workplace’s role in driving innovation, well-being, and furthering social capital will become even more relevant. Working from home will be a flexible option, but the experience of culture and rewarding collaborative experiences will be at the office. ■

LONG TERM RECOMMENDATIONS

- 1 Determine what level of **flexible distributed work** will be part of the company’s policy and continue to monitor and evaluate these policies.
- 2 Elevate platforms for effective digital communications as well as tools to support work and maintain top performance.
- 3 Develop and clearly communicate **health policies and sick leave parameters**.
- 4 Maintain a **healthy and clean environment** to reduce anxiety and emphasize the value of a well workplace.
- 5 Although not explicitly stated, providing for focused work at the workplace is an unresolved issue which should be studied to create work environments that draw people to the office **not only to collaborate face to face but to focus effectively**.



Space Matrix: TNG, Hong Kong

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?

Not surprisingly, the top ranked factor missed while working from home is face-to-face interaction with colleagues. In further surveys outside of the two reported here, we have found that people miss the social cues of being with one another, as well as the random nature of casual encounters and extemporaneous conversations. Video calls are effective for direct communication, but they don't allow for side conversations or nuanced body language. Both the IA and the SM survey show that people

award similar levels of value to being together rather than apart. In this regard, culture does not appear to be a differentiator. Both surveys reflect a near equal importance on the value of collaboration with colleagues, which is closely aligned to the response favoring face-to-face interaction.

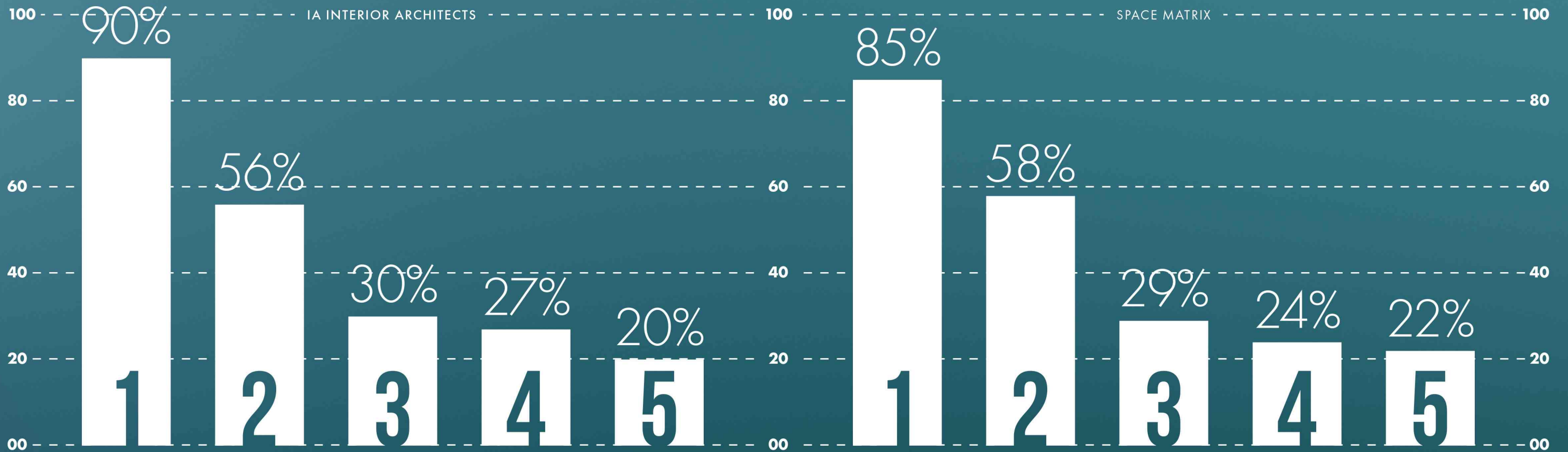
The third top ranked factor missed when working from home is the routine that comes with being in a physical workspace. We interpret this as the diminished ability to control how time is spent when working from

Top Five Results IA

1(90%) Having face to face social interactions.
 2(56%) The ability to collaborate with colleagues.
 3(30%) Having a normal daily routine. 4(27%) Being able to work with dual monitors. 5(20%) Having a variety of places to work in.

Top Five Results SM

1(85%) Having face to face social interactions.
 2(58%) The ability to collaborate with colleagues.
 3(29%) Having a normal daily routine. 4(24%) The ability to concentrate. 5(22%) Having a variety of places to work in.



home, which may be due in part to the presence of children, pets, or other responsibilities that compete for attention. This also alludes to the blurring of home and work; keeping the two compartmentalized may create a measure of stress.

A difference between the two cultures appears at the fourth ranked question. In the U.S. people miss having dual monitors, which allow for better content management, review, and analysis. For Asia the fourth ranked response was the ability to concentration, suggesting that it is harder to concentrate at home than at the office.

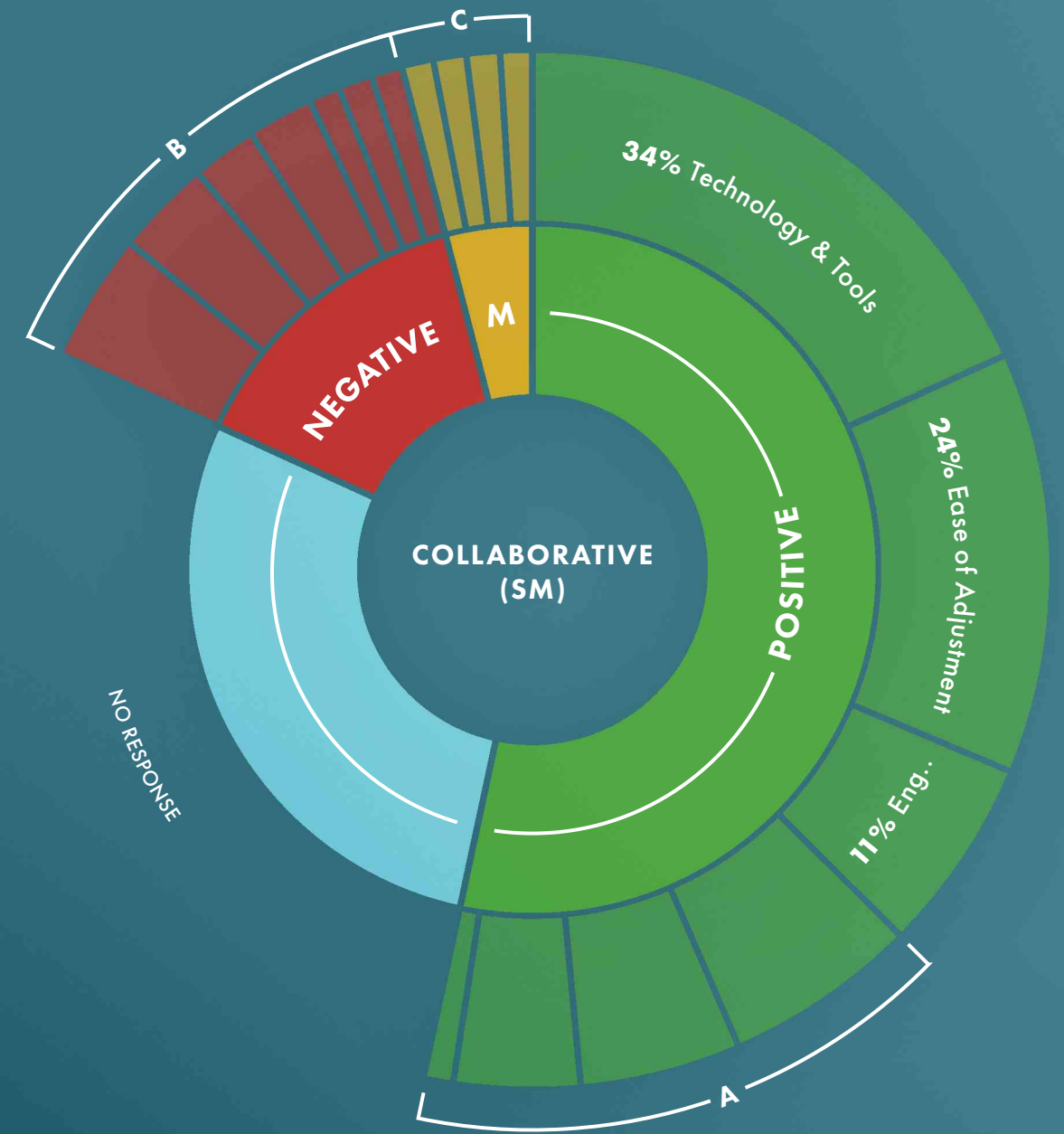
Finally the fifth ranked item for both surveys indicates that the home lacks the variety of places to work provided at the office. This is interesting because we don't know if the responses reflect a difference between those living in apartments and those living in discrete houses. The office appears to be viewed as a place where work can be done in more than one place throughout the day.

Collaborative Work From Home Findings

While there was a similar percentage of positive comments (55%) from respondents in both the U.S. and Asia on collaborative work from home, the breakdown between the two regions was different. A clear majority in the U.S., 84% (3.5 times more than in Asia at 24%), were pleased with how well they were able to quickly and easily adapt to working from home and collaborating virtually. Asian respondents, however, were most positive about using technology to collaborate and how it enabled greater learning experiences.

On the negative side, U.S. respondents missed the real-time interaction of physically being together a lot more (61%) than did Asian respondents (16%). Both sets of respondents had mixed feelings about their ability to adapt to collaborating at home. It could be that those who have others at home, for instance an extended family, competing for their time may require a longer period to adapt and adjust to the balance required between work and home.

Remote working is more than having a laptop. For those who work at home, organizations will need to consider physical setups and ergonomic health, which will contribute to operating costs from home.



- POSITIVE SENTIMENT**
- 84% Ease of Adjustment, and Adaptability
 - 10% Productivity, and Engagement
 - A 3% Face to Face Preference
 - 2% Technology, Learning
 - 1% Increased Meetings

- NEGATIVE SENTIMENT**
- 61% Face to Face Preference
 - 27% Technology, Learning
 - B 7% Difficulty of Adjustment and adaptability
 - 6% Increased Meetings
 - 11% Productivity and Engagement

- MIXED SENTIMENT**
- 42% Ease of Adjustment, and Adaptability
 - 40% Face to Face Preference
 - 10% Technology, Learning
 - C 5% Productivity and Engagement
 - 6% Increased Meetings

- POSITIVE SENTIMENT**
- 34% Technology & Tools
 - 24% Ease of Adjustment, and Adaptability
 - 11% Engagement
 - A 11% Camaraderie
 - 9% Learning New Skills
 - 7% Productivity
 - 2% Increased Video

- NEGATIVE SENTIMENT**
- 30% Difficulty of Adjustment
 - 19% Technology & Tools
 - 16% Preference for Face to Face
 - B 12% Engagement
 - 9% Productivity
 - 6% Increased Meetings
 - 4% Video Etiquette

- MIXED SENTIMENT**
- 26% Technnology & Tools
 - C 22% Face to Face Preference
 - 20% Difficulty of Adjustment
 - 11% Learning New Skills

Resoundingly, both U.S. (73%) and Asian (73%) respondents believe companies need to invest more in communication technology for the long term to support business continuity and the interaction of distributed teams.

Productivity and Engagement is interesting in the varied results it produced. Some felt it was positive (U.S. 10%, Asia 18%), others felt that it was negative (U.S. 11%, Asia 21%), and some indicated a mixed sentiment (U.S. 10%, Asia 12%).

Resoundingly, both U.S. (73%) and Asian (73%) respondents believe companies need to invest more in communication technology for the long term to support business continuity and the interaction of distributed teams. Remote working is more than having a laptop. For those who work at home, organizations will need to consider physical setups and ergonomic health, which will contribute to operating costs from home. Guidelines are needed around managing remote teams and conducting meetings online. One respondent noted, "Virtual meetings where people did not put the video on made me feel like speaking in a void."

Individual Work From Home Findings

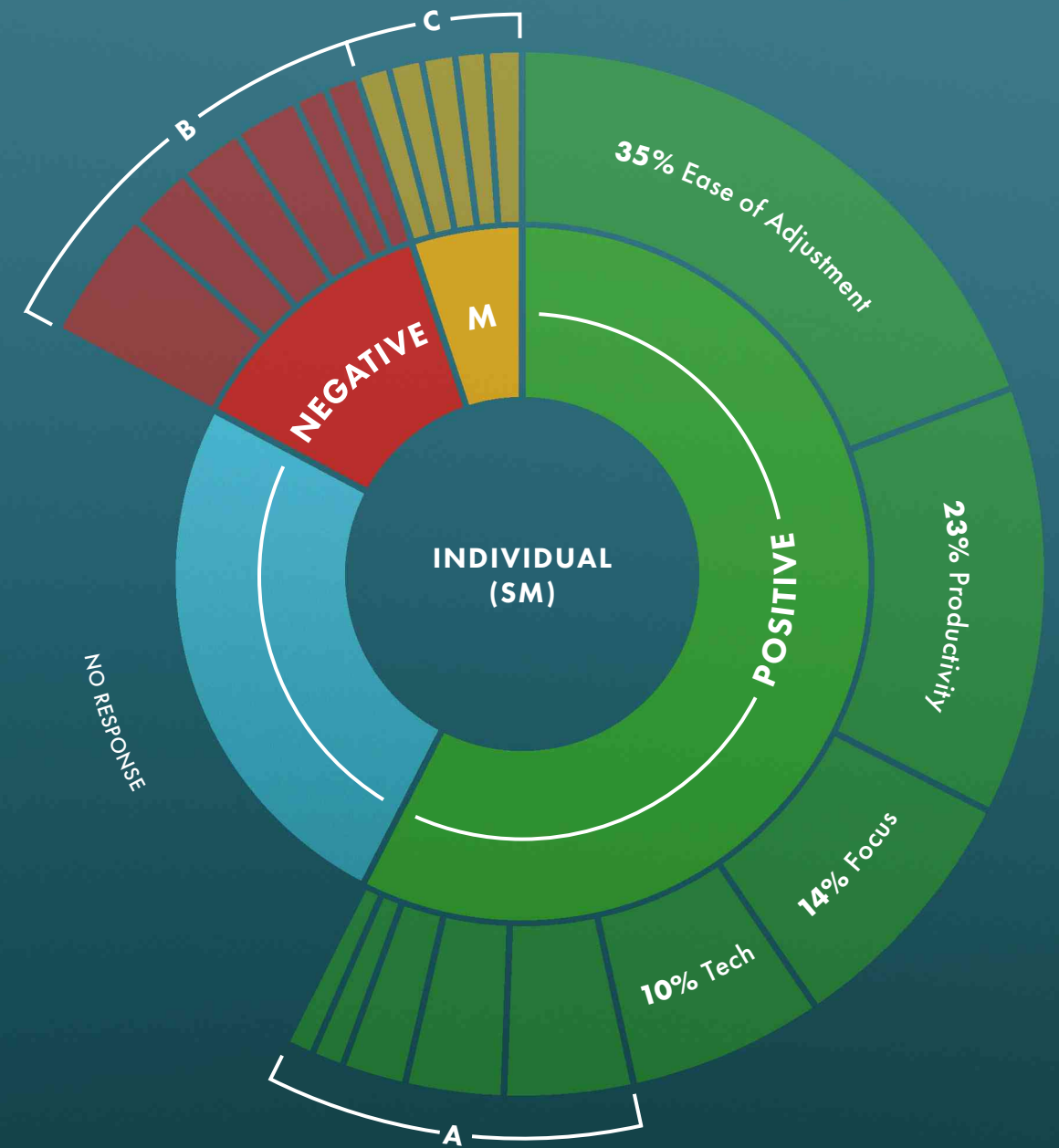
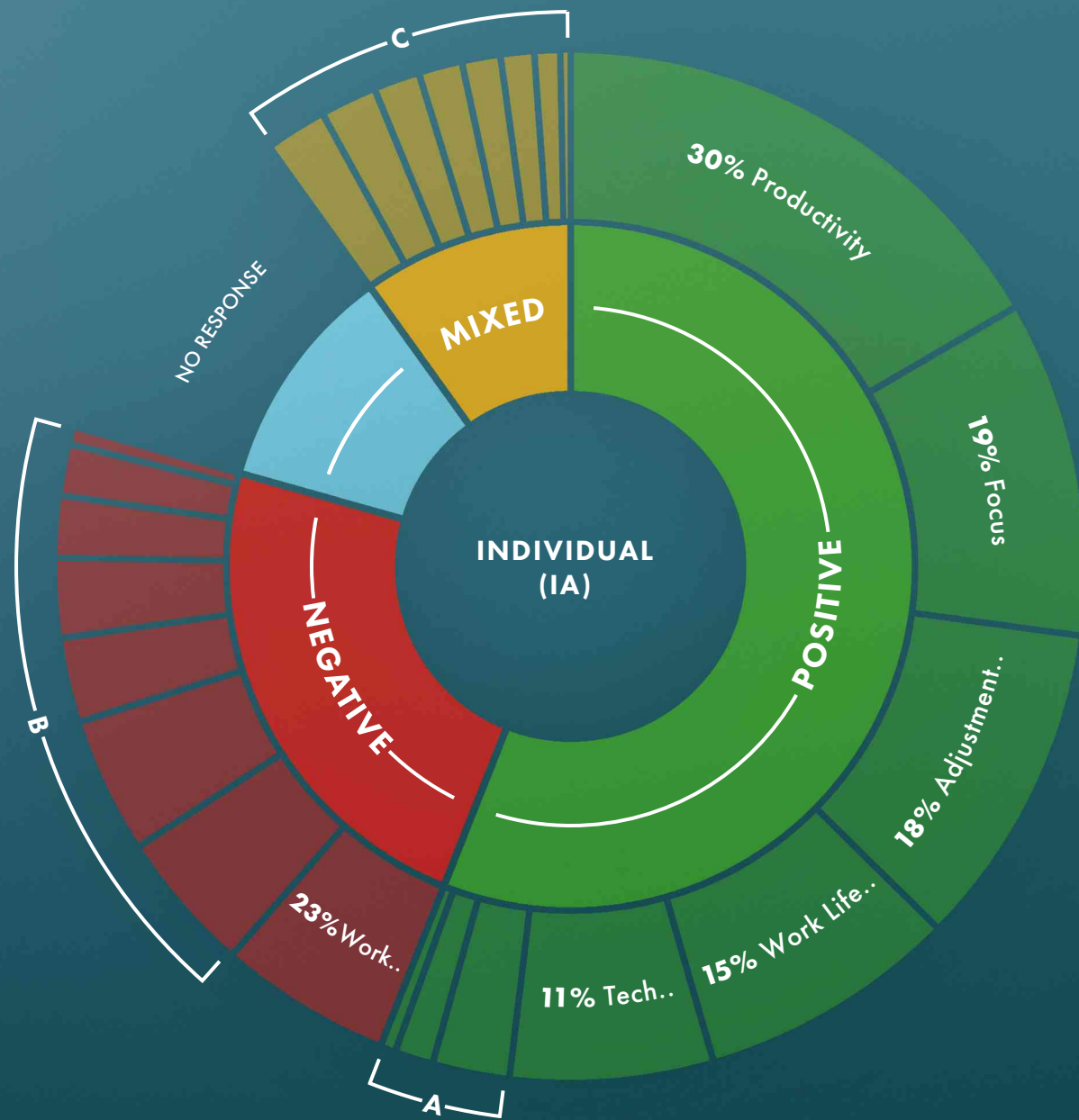
For U.S. respondents productivity was at the top of the list for positive sentiment, as well as for mixed sentiment. This could mean many things, but as a follow-up it will be interesting to learn what was impeding productivity for some and what was a positive asset for others. Similarly, for Asian respondents the ease of adjustment and adaptability appeared at the top for both positive and negative sentiment.

Work Life Balance was near the top of the list for negative and mixed sentiment in both regions. Since this survey was released and analyzed, we have heard that people often feel their personal space, their home, is now blurred with the work world. We have also heard that physically separating these two aspects of the weekday is helpful in mentally drawing a line between home and work, as is commute time, which offers both a ramp up to the day and a decompression at the end of the day.

Interaction was also at the top of the list for both negative and mixed sentiment, indicating that many responders were feeling alone and missed daily interaction with their work families.



Space Matrix: Airbnb, Gurgaon



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
A 2%	Outside Effects	7%	Adjustment, Adaptability	8%	Technology
1%	Ergonomics	2%	Ergonomics	3%	Ergonomics

POSITIVE SENTIMENT		NEGATIVE SENTIMENT		MIXED SENTIMENT	
35%	Ease of Adjustment	29%	Difficulty of Adjustment	21%	Work-Life Balance
23%	Productivity	17%	Productivity	17%	Technology & Tools
14%	Focus	17%	Isolation	C 17%	Isolation
10%	Technology & Tools	15%	Work-Life Balance	15%	Productivity
7%	Work-Life Balance	10%	Ergonomics	12%	Ease of Adjustment
5%	Travel	7%	Focus		
3%	Interaction Isolation				
2%	Ergonomics				

Of the positive comments from respondents in Asia, 20% cited camaraderie, a surprising outcome, with people making an effort to set aside old conflicts to unite and reconfigure strategies, processes, and technologies—systemic change calls for a united response.

Individual Work From Home Observations

Some respondents spoke of camaraderie in a reinvigorated sense as a company value. Individuals have engaged empathically during these trying times and made the effort to learn new skills while working

remotely. People suddenly discovered a hidden reservoir of trust and amity, and almost seemed to rush to help one another.

In spite of the initial discomfort managers may have experienced with remote work, they learned new ways to collaborate with their staff. Consider the post-pandemic era as a time of resilience and competitive advantage. As organizations look to distributed teams and remote work, they can harness new learned behaviors, build on the current momentum, and accelerate a transition to greater agility. ■

WFH RECOMMENDATIONS

- 1 Employers should look at recommending guidelines to help staff **navigate work-life balance when working from home.**
- 2 Communicate often and check in with remote workers to **make sure they feel productive and engaged** in the work they are doing for the firm.
- 3 Technology is an area that needs thoughtful consideration—how can companies **better enable staff to be productive when not in the office?**
- 4 Invest and train for **better technological support and communication experiences.**



CONCLUSION

Returning to the Office: A Global Perspective

Office life used to be well defined. There were routines. The meeting room was in use or not. We knew where people were physically located and how to get hold of them when needed. All these routines will change. People have had a taste of choice and like the empowerment.

“We can work together to shape a new reality with new ways of thinking, living, and working that will make us safer from Covid-19 and other threats in the future,” according to Dr. Takeshi Kasai, World Health Organization regional director for the Western Pacific states.

Although this extreme social experiment was thrust upon the world, the findings tell a story of resilience, agility, hope, and optimism. The workforce, for the most part, was able to quickly leave the office and begin working remotely from home. We continue to work from home at the time of this writing although the story continues to evolve. Our surveys were useful in understanding the concerns, frustrations, and hurdles involved with work and social distancing; they illustrate our quick and flexible response in creating a home workplace, navigating care of others, and

finding ways to balance the competing needs of home and office at a single location.

As businesses step into the post-coronavirus future, organizations need to find an equilibrium between what worked well before, what they learned when forced into lockdown, and what needs to happen to succeed in the new normal. The two surveys provide a rare glimpse into cultures that are highly aligned in their values and response to the work from home experience.

What we are currently experiencing is a very tactical approach to how we function remotely and the beginning of planning for what happens when we return to the office. We anticipate a transition period in adjusting to our return while maintaining varying levels of flexibility. The real question remains: How does the workplace evolve from the transition? The emphasis will be on where work is done, how work is done, and how technology will continue to augment the way we create, and innovate, which is key. Possibilities and opportunities, nonexistent or barely conceived prior to the pandemic, now offer an intriguing potential to shape the future.

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