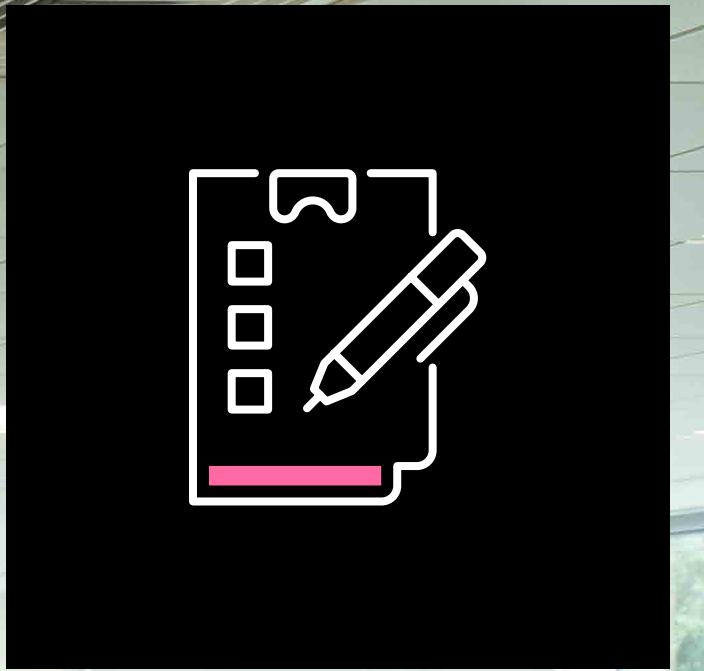Morgan Lovell

Survey:
Balanced Workplace survey results

March 2021

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On the anniversary of the first Covid restrictions coming into force in the UK, Morgan Lovell used OnePulse to poll 850 office workers to find out their expectations of the post-pandemic office environment. This survey followed a similar survey last December and again in June 2020 allowing us to analyse how people's perceptions have changed as the pandemic has continued.
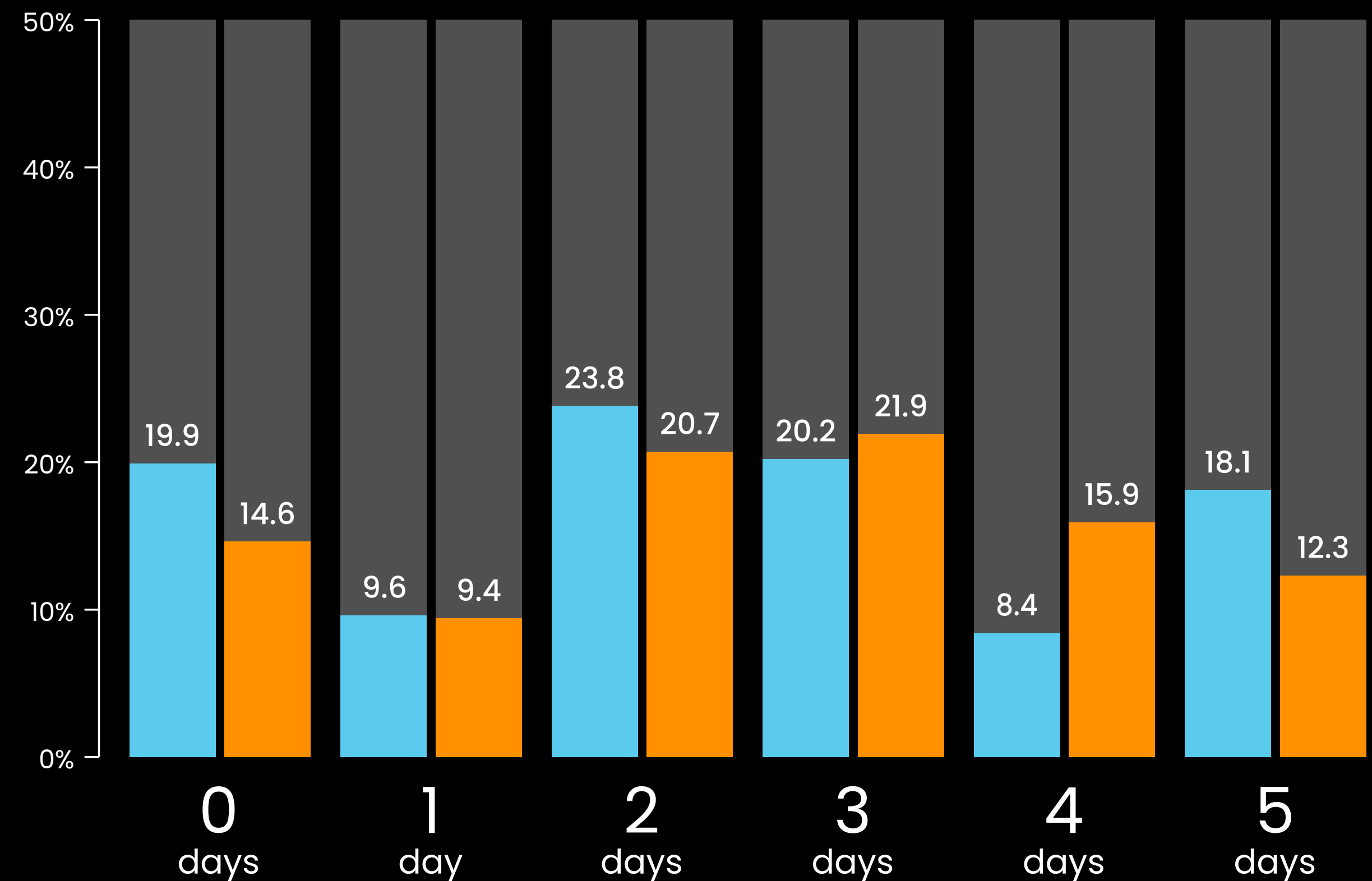
Post-pandemic working from home

With many individuals and organisations planning their return to work, we asked respondents how many days per week they expected their employer would allow them to work from home once the pandemic is over. The results show a clear employers' preference for 2 days (24%) and 3 days (20%) working from home.

It is fairly similar to employees own desires. In January we conducted a snap poll asking people, if they had the choice, how many days they'd like to work from home.

How many days per week...

- ...do you expect your employer will allow you to work from home once the pandemic is over?
- ...would you like to work from home once the pandemic is over?

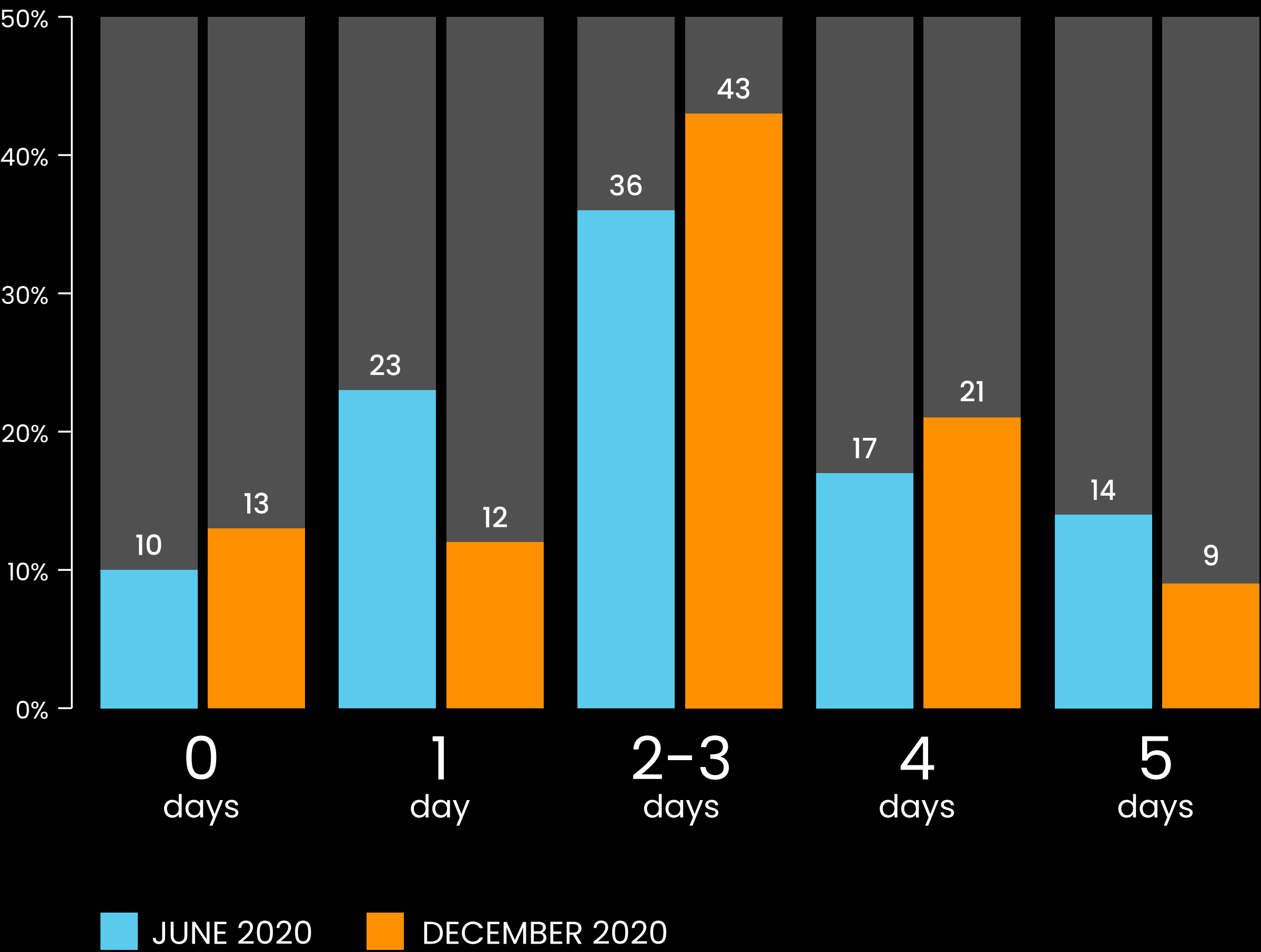|	0 days	1 day	2 days	3 days	4 days	5 days
Expect	19.9	9.6	23.8	20.2	8.4	18.1
Would like	14.6	9.4	20.7	21.9	15.9	12.3

The results have shifted since we first asked the question in June last year with a general increase in the amount of time people want to work in the office.

There was little difference in the views of men and women, or perhaps more surprisingly, different age groups, but there was evidence of a disparity in different job roles. More junior roles such as interns expect to be allowed to work from home far less than directors, for example, perhaps because they need to learn from others to perform their roles successfully.

After the pandemic, I would like to work from home:

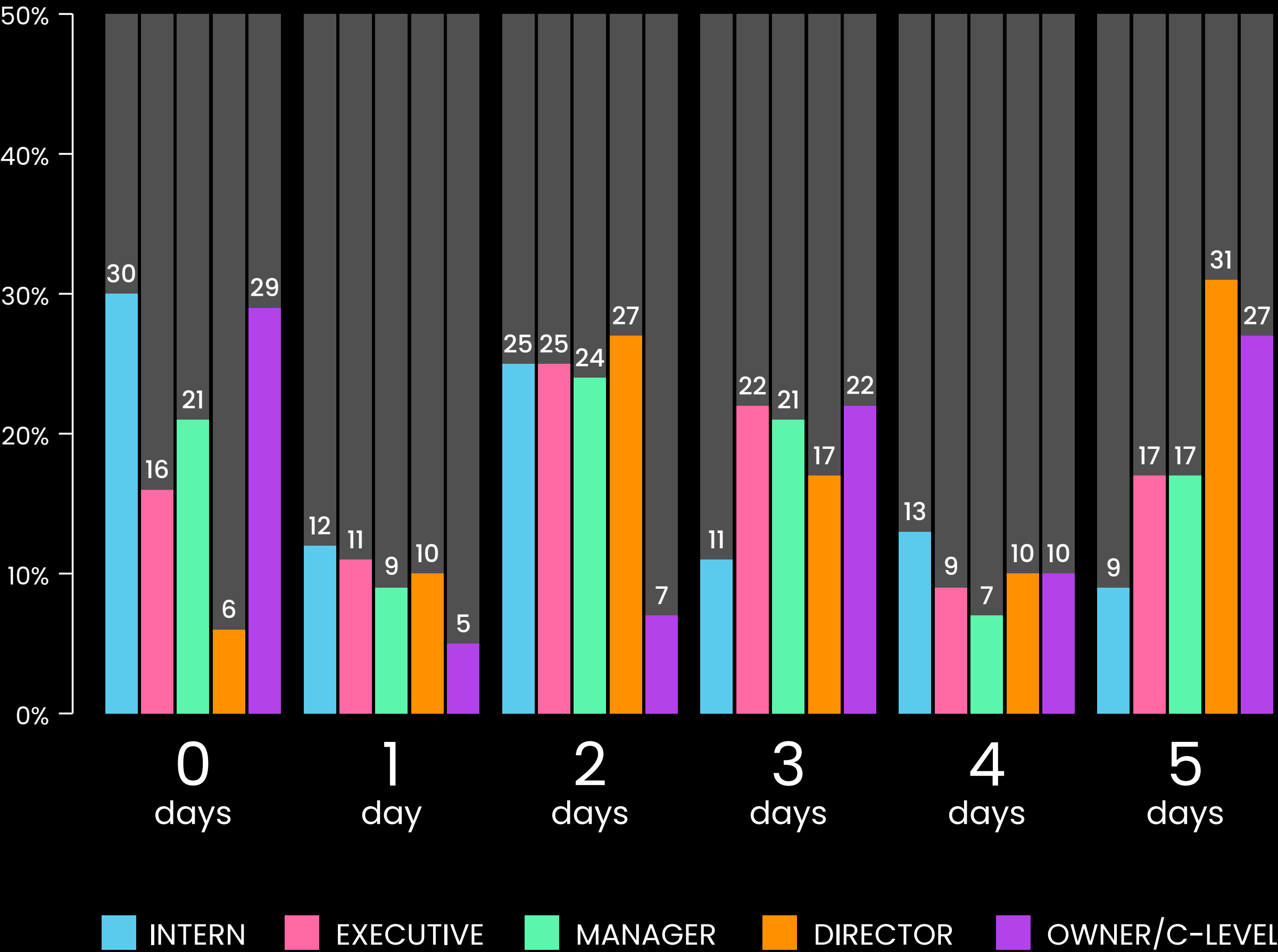|	June 2020	December 2020
0 days	10	13
1 day	23	12
2–3 days	36	43
4 days	17	21
5 days	14	9

JUNE 2020   DECEMBER 2020

But managers are also likely to be more present in the office than their directors, suggesting that they need to be visible to manage their teams. Interestingly the owner/ C-suite level we polled are also planning to work from home less than might be expected, indicating they want to lead by example and show the importance of the office environment for teamwork and creating social capital.

People working in the IT and property sectors expect to be able to work from home more; meanwhile those in the engineering/manufacturing, law, life sciences, and education sectors expect to spend more time in their physical workplace.

While in London and the south-east, two or three days homeworking was the most popular option, the picture was more mixed elsewhere. In the north-west, almost a quarter (24.0%) of people say their employer will allow them to work from home five days a week while people in the south-west, Midlands, Wales, East of England and Yorkshire and the Humber believe their employer will allow little home working once the pandemic is over.

How many days per week do you expect your employer will allow you to work from home once the pandemic is over?

	0 days	1 day	2 days	3 days	4 days	5 days
INTERN	30	12	25	11	13	9
EXECUTIVE	16	11	25	22	9	17
MANAGER	21	9	24	21	7	17
DIRECTOR	6	10	27	17	10	31
OWNER/C-LEVEL	29	5	7	22	10	27

Post-pandemic working environments

In a somewhat damning indictment of our current workplaces, 87% of respondents believe their workplace needs to change after Covid. The most popular option was an environment which offers enhanced wellbeing and health facilities (48.5%) followed by a social hub with spaces to meet clients/colleagues/mentors (33.8%) and one with sustainable / environmentally-friendly working practices and construction methods (33.3%). Just 13.3% said that their workplace was perfect already and they didn't need it to change. On a positive note, 75.5% of respondents believe their employer will make the changes needed.

After the pandemic, if you could change your working environment, what would you like to see? (tick all that apply)

One that offers enhanced wellbeing and health facilities
48.5%

A social hub with spaces to meet clients/colleagues/mentors
33.8%

One with sustainable/environmentally-friendly working practices and construction methods
33.3%

A team space for collaboration on projects
31.8%

One more like a university campus, with a variety of spaces for different tasks
23.9%

I don't want it to change – my workplace is perfect already
**13.3%**

As we emerge from a global pandemic, it's perhaps unsurprising that health and wellbeing tops the list of people's priorities for their workplace. And given that many have spent the past year working at home, away from regular face-to-face contact with their colleagues, the fact that a social hub ranks highly is also understandable. In our research late last year, 90 percent of people had missed the social contact of the office while 47 percent cited the ability to collaborate as something they were looking forward to getting back to in the physical workplace.

Overall, younger respondents were keener to see change in the office environment compared to their older counterparts, and were more likely to want to see change in a number of areas rather than one or two. Just 4 percent of 18-20 year olds and 9 percent of 21-24 year olds said their workplace was perfect compared to 20 percent of 45-54 year olds and 29 percent of 55-64 year olds.

Those in more junior roles (interns, executives and even managers) were more focused on health and wellbeing facilities while directors and the C suite saw this as slightly less important. Interestingly director-level respondents saw creating social hubs and spaces for collaborations as almost as important as wellbeing, reflecting senior people's recognition of the need to bring social capital back to the workplace after the enforced period of homeworking.
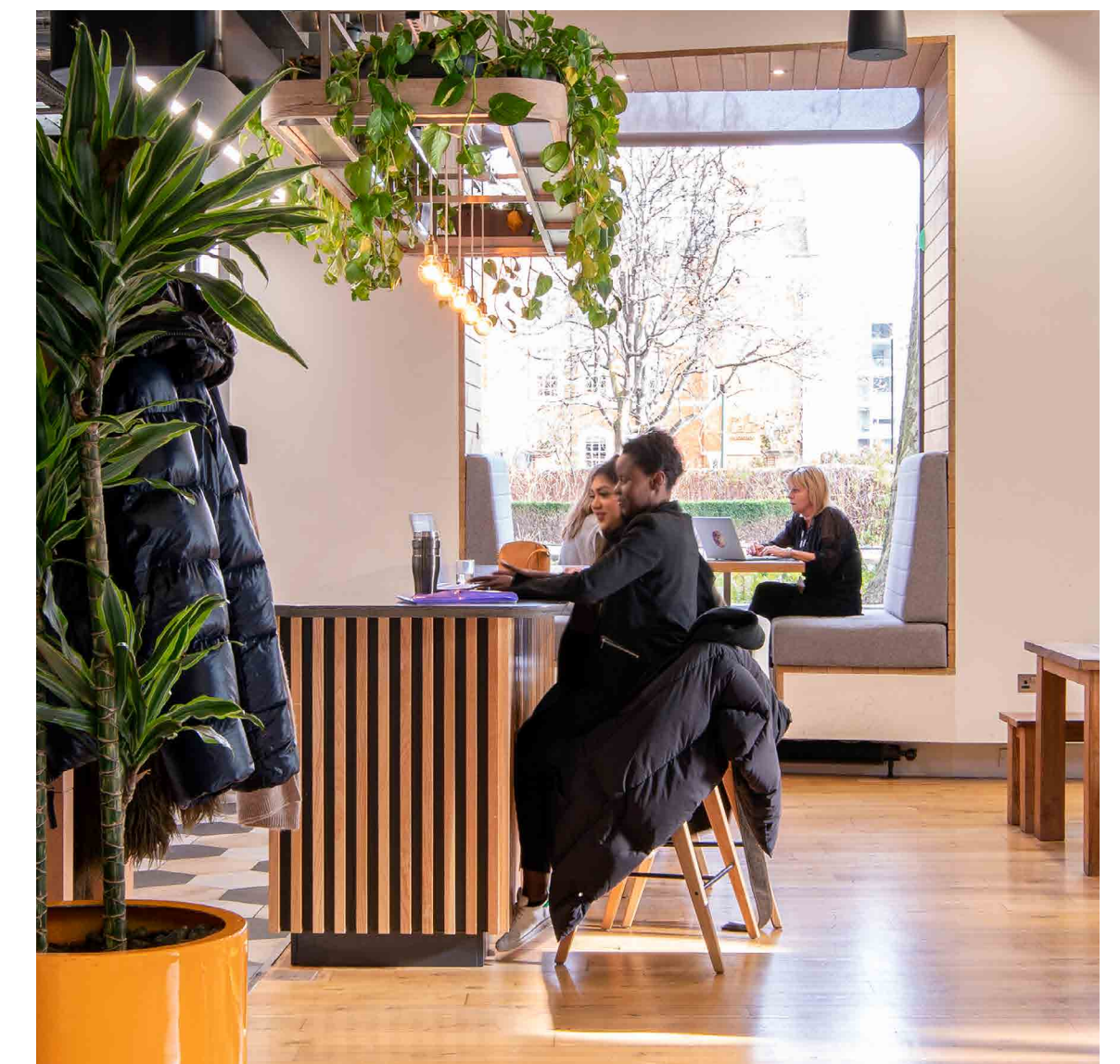
There were also some interesting differences across the sectors. While a workplace which offered enhanced wellbeing was top for most sectors, the market research sector and recruitment/HR was keener on one with sustainable working practices and construction. This was also a key priority for those working in the energy/utilities sector. A team space for collaboration on projects was popular with those in the public sector, energy and utilities and recruitment/HR. Those working in the transport/logistics sector were most likely (29 per cent) to say their workplace was perfect and didn't need to change.

People living in Wales and Scotland wanted their workplace changed to become a team space for collaboration on projects – wellbeing was less of an issue for those groups. Those in the south-west and West Midlands were more focused on sustainable workplaces. People in the north-east (23 percent) and South-West (21 percent) were most likely to say that their workplace was perfect and didn't need to change. Those in London were the unhappiest with their space with just 6 percent saying their workplace was perfect.
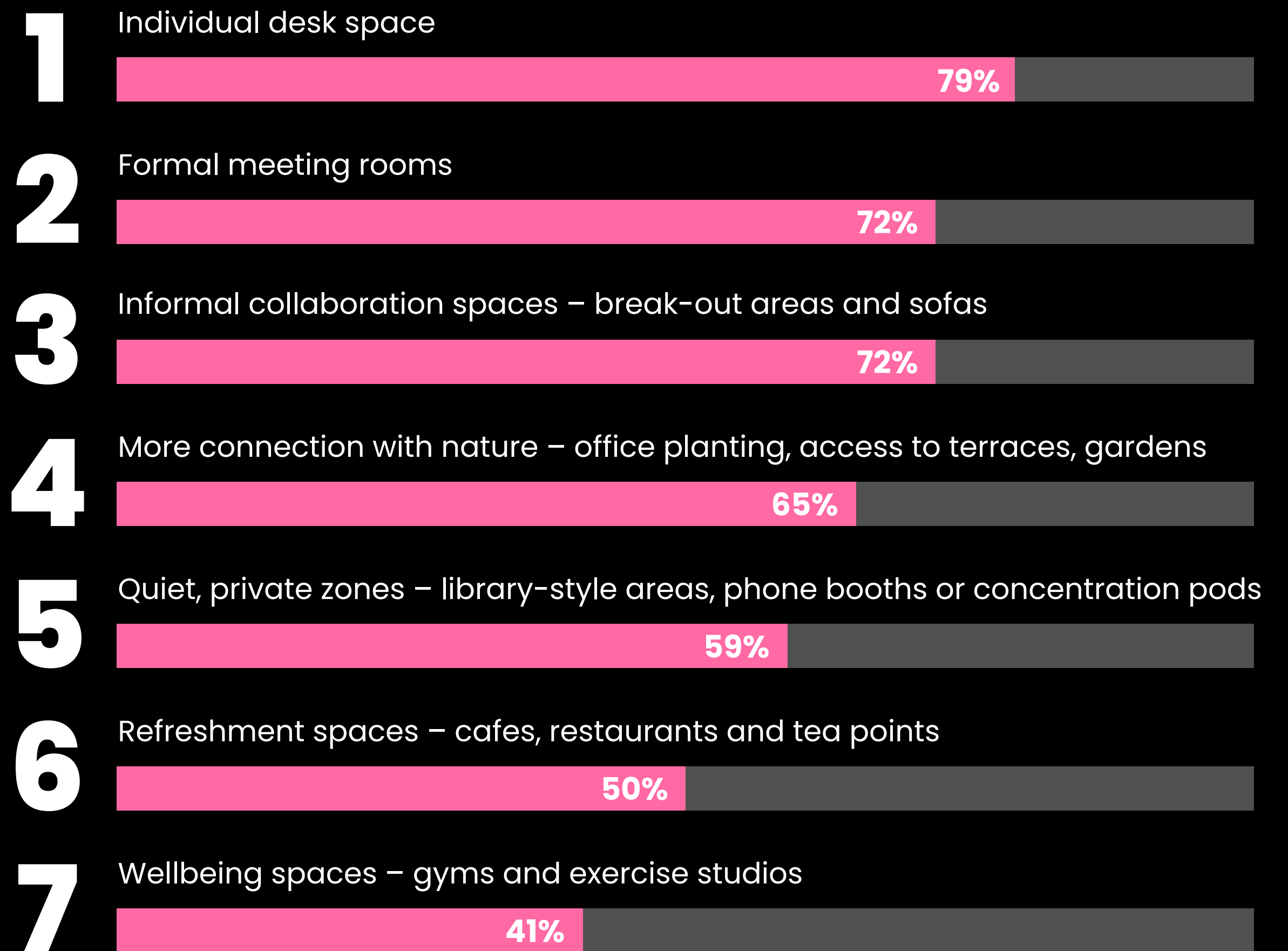
Which work settings would you prefer to use?

Thinking about the work settings available in the office, we asked our group of respondents which areas they'd like to see prioritised in the post-pandemic world. The results were a clear vote in favour of more traditional work settings – individual desk space and formal meeting rooms – but with informal collaboration areas a close third.

This echoes research we conducted back in June last year when a dedicated desk was ranked as the top priority in a post-Covid world.

Which types of work areas would you like to see prioritised in your workplace once the pandemic is over? (rate in order of preference)

1 Individual desk space
79%

2 Formal meeting rooms
72%

3 Informal collaboration spaces – break-out areas and sofas
72%

4 More connection with nature – office planting, access to terraces, gardens
65%

5 Quiet, private zones – library-style areas, phone booths or concentration pods
59%

6 Refreshment spaces – cafes, restaurants and tea points
50%

7 Wellbeing spaces – gyms and exercise studios
41%

Interestingly, in March 2021 women voted for informal collaboration areas as their second priority rather than formal meeting rooms which was men's second priority after individual desk space.

Younger people were also keen on formal meeting rooms – rating it as their joint top priority alongside an individual desk, perhaps seeing it as an environment where they have the opportunity to learn from more senior people or shine in front of them. Director-level respondents meanwhile ranked informal collaboration spaces as more of a priority than informal meeting rooms.

There were also some interesting comparisons in the different sectors. People working in engineering and manufacturing, recruitment and HR, and energy/ utilities ranked formal meeting space as their key priority for the post-pandemic workplace with the individual desk a humble second. Respondents working in market research preferred informal collaboration areas, seeing that as their priority.

Overall this research underlines that people see the workplace as central to their future working lives. Many want to maintain a degree of home working in the future and employers are willing to allow their people to maintain a balanced approach to their work and home life. But 87% of respondents believe their workplace needs to change after Covid to adapt to the new normal.

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As we emerge from a pandemic and a year of home working, it's perhaps unsurprising that health and wellbeing and creating a social hub in the workplace ranks so highly. What's interesting is that despite the desire for change, the majority of respondents still crave individual desks and formal meeting rooms. But people's views differ depending on their age, sex, their job role, their location and the sector in which they work. Organisations must listen carefully to their people's priorities before planning the post-Covid working environment.

What's clear is that as organisations plan the return to the workplace, there is an enormous opportunity for both people and their employers to create a more balanced workplace which best supports their needs and enables them to work at their very best.

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