

A REPORT BY



THE HYBRID WORKPLACE

AN EMPLOYEE CENSUS

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- The use of community spaces is likely to rise
- Does home working make it difficult to maintain culture and connection?

CONCLUSION

REDEFINING WHAT 'WORKPLACE' MEANS

Until now, the definition of workplace remained unchallenged

If asked to define 'workplace' before the pandemic, it is likely that most of us would have agreed that it was exemplified by the physical office. And while it has remained such, trends in office culture have come and gone – from the cynically named bull-pen offices of the fifties and the siloed cubicles of the nineties to the more recent playful tech hubs of Silicon Valley.

But that's all they were: trends – or simple variations on the same theme.

But then came 2020. And a far more significant shift was set in motion. Some might argue the Covid-19 pandemic simply accelerated a move away from the office thanks to enforced remote working. Either way, society and commerce has been presented with a rare opportunity to reassess and modernise its understanding and definition of the workplace.

Rethinking the meaning of workplace

If we stand back and really ponder what a workplace is – given our experience over the last year – we might now come up with different answers.

To a CEO, board member or shareholder, the workplace might be defined as a space in which maximum productivity is reached. And given the evidence, this is unlikely to be limited to an office environment seeing as productivity has risen with home working.

To an employee, the workplace might possess a less tangible meaning. This could range from a social community through to a sense of identity or cultural belonging.

This suggests that we can no longer view the workplace as purely physical. It must be seen more as a collection of facilities – both physical and digital – designed to enable employee productivity, bring development opportunities and enhance wellbeing. To

help companies rethink the workplace, we set out to gather some qualitative insights from office workers that might help companies think about the best working environment – one which promotes maximum productivity and wellbeing, and which is more aligned to today's values.

**UNTIL NOW, THE
DEFINITION OF
WORKPLACE
REMAINED
UNCHALLENGED**

WHO DID WE SURVEY?

Our survey was conducted by YouGov, who spoke to both US and UK-based workers that worked in an office before the pandemic and who are now able to work from home.

All results are based on 'All UK/US adults who work in an office and are able to work from home'. All figures, unless otherwise stated, are from YouGov Plc.

Total sample size was 2491 adults (US) and 2071 adults (UK).

The figures have been weighted and are representative of all US and UK adults (aged 18+)>

Base for US: 1169
Base for UK: 1169

WHAT WERE RESPONDENTS WORKING SITUATIONS BEFORE THE PANDEMIC?



SECTION ONE

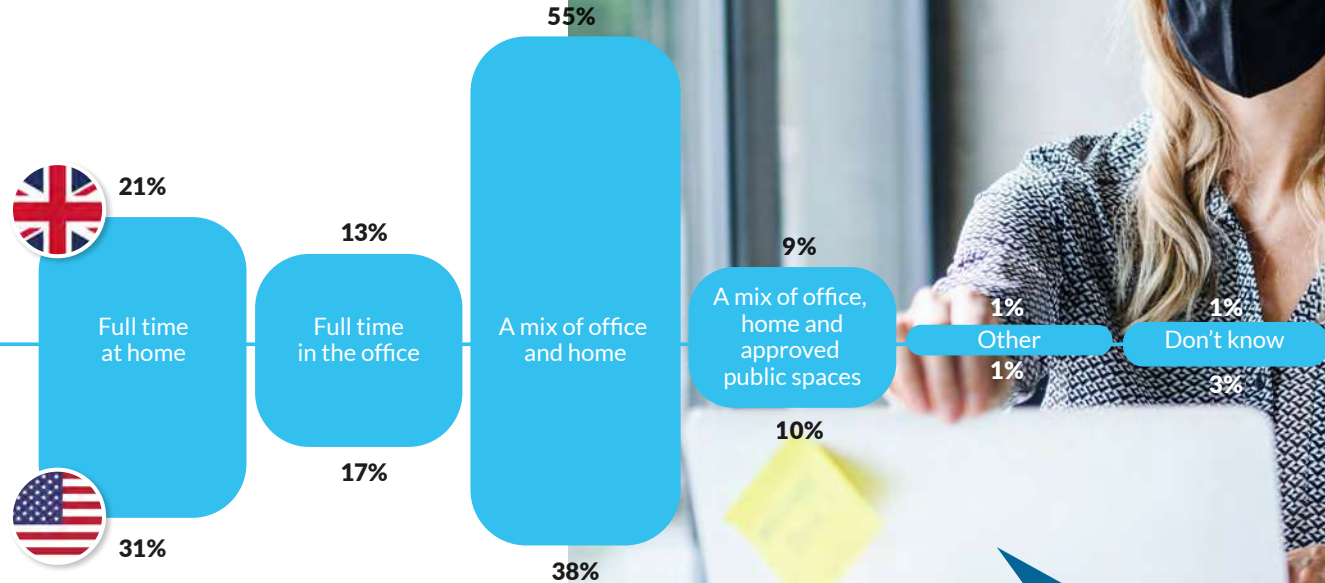
WHAT DOES THE WORKFORCE WANT?

People don't want a full-time return to the office

Almost overnight, the question around home working shifted from 'Can it be done?' to 'Should it be done?'

Companies are unlikely to ignore the increased productivity and cost-saving that enforced remote working has delivered.

But while the impacts on the bottom line may have been positive in the shorter-term, employee attitudes will be as crucial to future productivity. After all, a temporary period of home working is something quite different to making it work as a permanent working habit.



WHAT WORKING SITUATION WOULD RESPONDENTS PREFER AFTER THE PANDEMIC?

1 - <https://www.ipsos.com/sites/default/files/ct/news/documents/2020-11/cbi-conference-survey-october-2020.pdf>, p.5



A hybrid model is the answer

While the workforce might not want a full-time return to the office, they told us that staying at home indefinitely was not an option either.

The majority in the UK and nearly half in the US agree a hybrid model would work best for them when coronavirus restrictions are fully lifted.

THOSE WHO WANTED A MIX OF HOME AND OFFICE, OR A MIX OF HOME, OFFICE AND OTHER PUBLIC SPACES

21%



64%



48%



31%

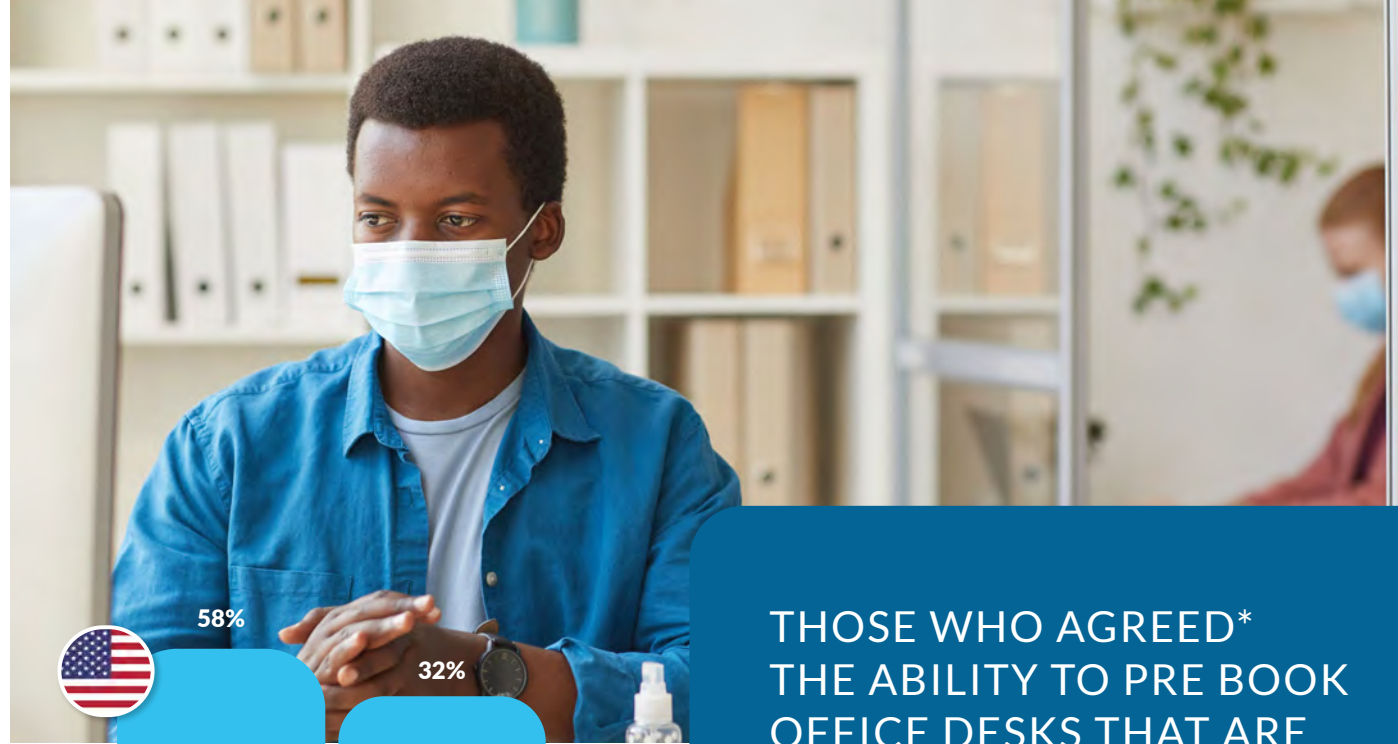


THOSE WHO WANTED FULL TIME HOME WORKING WHEN CORONAVIRUS RESTRICTIONS ARE FULLY LIFTED



Home and office working aren't the only options, especially for the younger generations. We also asked respondents about their attitudes towards using public workspaces such as cafes.

However, we must consider the context such as enforced lockdowns and fear of Covid-19 infection as to why people haven't been using public spaces. In this sense, it seems that the right measures that give employees confidence in a safe return to the office will make a difference, especially to younger people.



58%

18-24

32%

Over 55

40%



71%

**18 TO 24 YEAR OLDS
AGREE THAT THEY WOULD
BE MORE LIKELY TO RETURN
TO THE OFFICE IF THEY COULD PRE-BOOK
SOCIALLY DISTANT SAFE DESKS RATHER
THAN HOT DESKING**

**THOSE WHO AGREED*
THE ABILITY TO PRE BOOK
OFFICE DESKS THAT ARE
SAFELY SOCIAL DISTANCED
(RATHER THAN HOT
DESKING) WOULD MAKE
RESPONDENTS MORE
LIKELY TO RETURN TO THE
OFFICE**

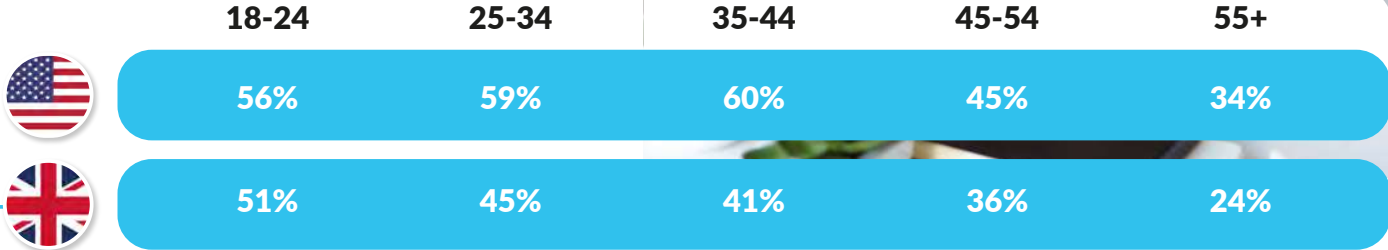
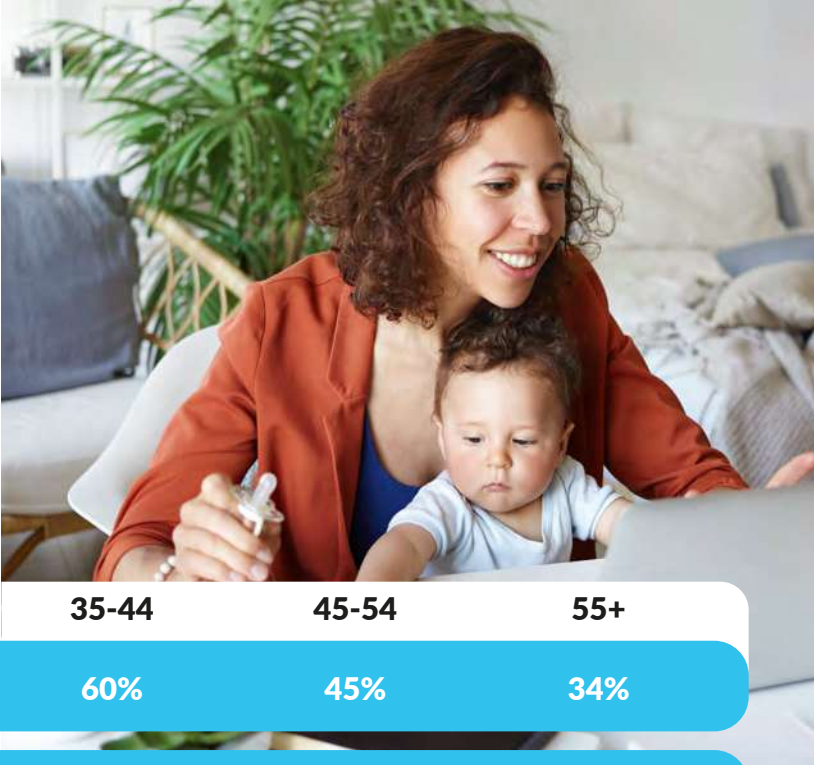
*Either strongly agreed or
tended to agree

SECTION TWO

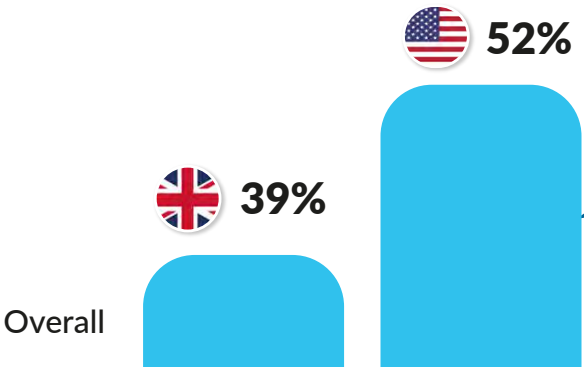
A HYBRID WORKPLACE MODEL MUST CONSIDER NUANCES OF THE WORKFORCE

Home pressures can stifle productivity in certain demographics


For certain demographics it is clear that being productive working from home is more difficult because of domestic pressures. This supports the idea of a hybrid workplace, in that a balance seems more likely to support employee wellbeing – and thus, productivity.



Breakdown by Age Group



RESPONDENTS THAT AGREE THAT TASKS AND PRESSURES OF HOME LIFE (EG. CHILDCARE, HOUSEWORK) WHEN WORKING FROM HOME MAKE IT HARDER TO BE PRODUCTIVE



AGE AND GENDER WERE
KEY FACTORS IN AGREEING
THAT TASKS AND PRESSURES
OF HOME LIFE WHEN WORKING
FROM HOME MAKE IT HARDER
TO BE PRODUCTIVE

60%

OF 35-44 YEAR OLDS FOUND IT HARDER TO BE PRODUCTIVE COMPARED WITH 45% OF 45-54 YEAR OLDS & 34% OF OVER 55 YEAR OLDS

57%

OF MALES FOUND IT HARDER TO BE PRODUCTIVE COMPARED WITH 46% OF WOMAN



THOSE IN SOCIAL GRADE C2DE MORE LIKELY TO AGREE THAT TASKS AND PRESSURES OF HOME LIFE WHEN WORKING FROM HOME MAKE IT HARDER TO BE PRODUCTIVE

WHILST **59%** OF RESPONDENTS IN SOCIAL GRADE ABC1 DISAGREED ABOUT THE NEGATIVE EFFECTS OF WORKING FROM HOME ON THEIR PRODUCTIVITY

PARENTS/
GUARDIANS

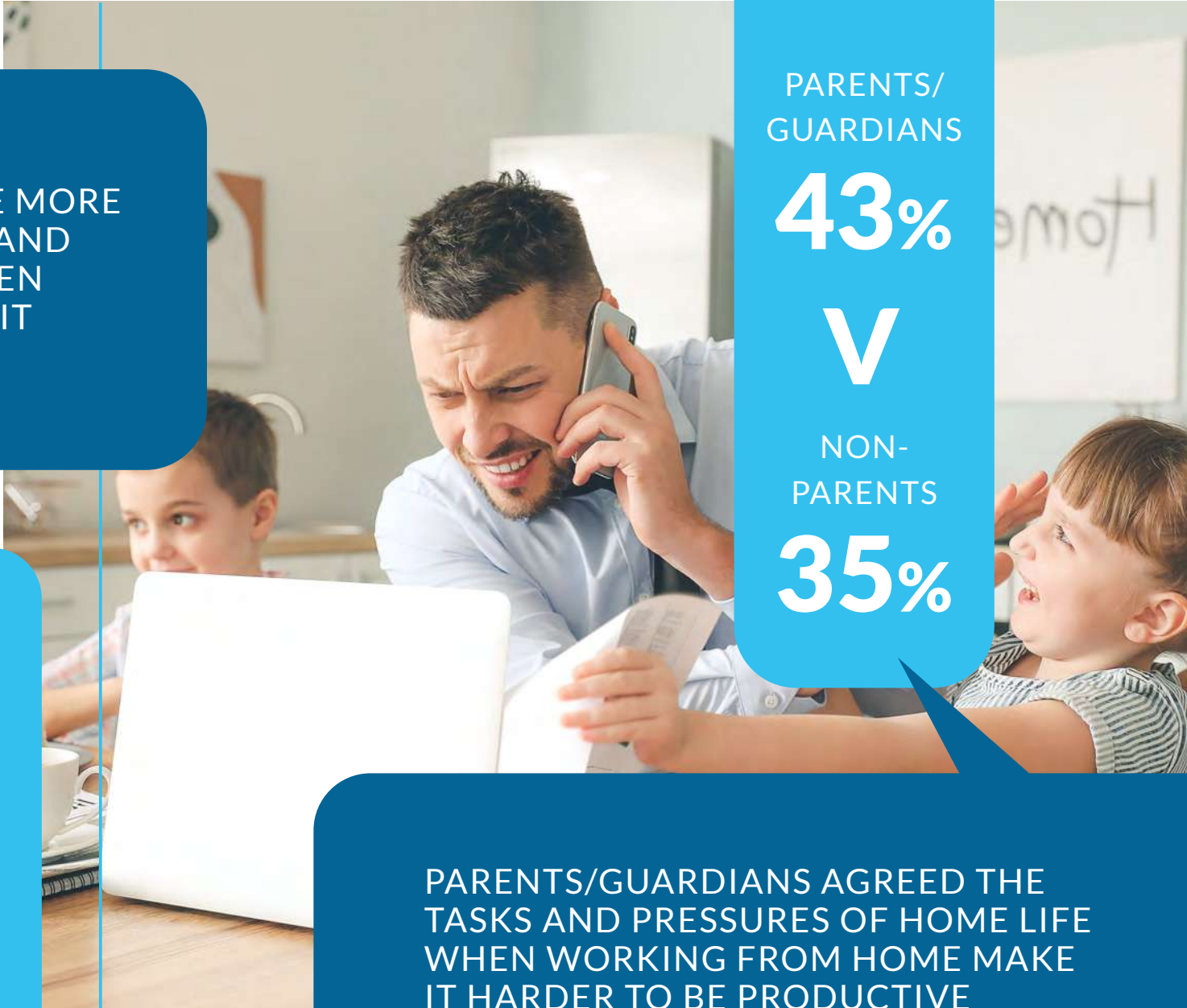
43%

V

NON-
PARENTS

35%

PARENTS/GUARDIANS AGREED THE TASKS AND PRESSURES OF HOME LIFE WHEN WORKING FROM HOME MAKE IT HARDER TO BE PRODUCTIVE



YOUNGER PEOPLE FIND VIRTUAL MEETINGS LESS PRODUCTIVE THAN FACE TO FACE MEETINGS

60% OF YOUNGER PEOPLE BELIEVE VIRTUAL MEETINGS ARE LESS PRODUCTIVE



25% OF 44-54 YEAR OLDS THINK VIRTUAL MEETINGS ARE LESS PRODUCTIVE

It's worth considering that feeling productive and being productive are potentially two different things. On paper, an employee may well have been more productive but have felt less productive because of the pressures of home life. The survey was also conducted during a period where the pandemic was significantly impacting lives – with home schooling and all members of a given household being home.



50%

OF 18-24 YEAR OLDS VERSUS 40% OF 45-54 YEAR OLDS AGREE THAT VIRTUAL MEETINGS ARE LESS PRODUCTIVE



WORKING FROM HOME IS HARDER FOR YOUNGER ADULTS

We also asked respondents how often they feel stress or anxiety while working from home. Results showed that regular stress and anxiety decreased with age

18 TO 24 YEAR OLDS CONSIDERABLY MORE LIKELY TO FEEL STRESS OR ANXIETY WORKING FROM HOME

RESPONDENTS WHO HAVE RARELY OR NEVER FELT STRESS WORKING FROM HOME

29% OF 18-24 YEAR OLDS COMPARED WITH

10% OF OVER 55 YEAR OLDS

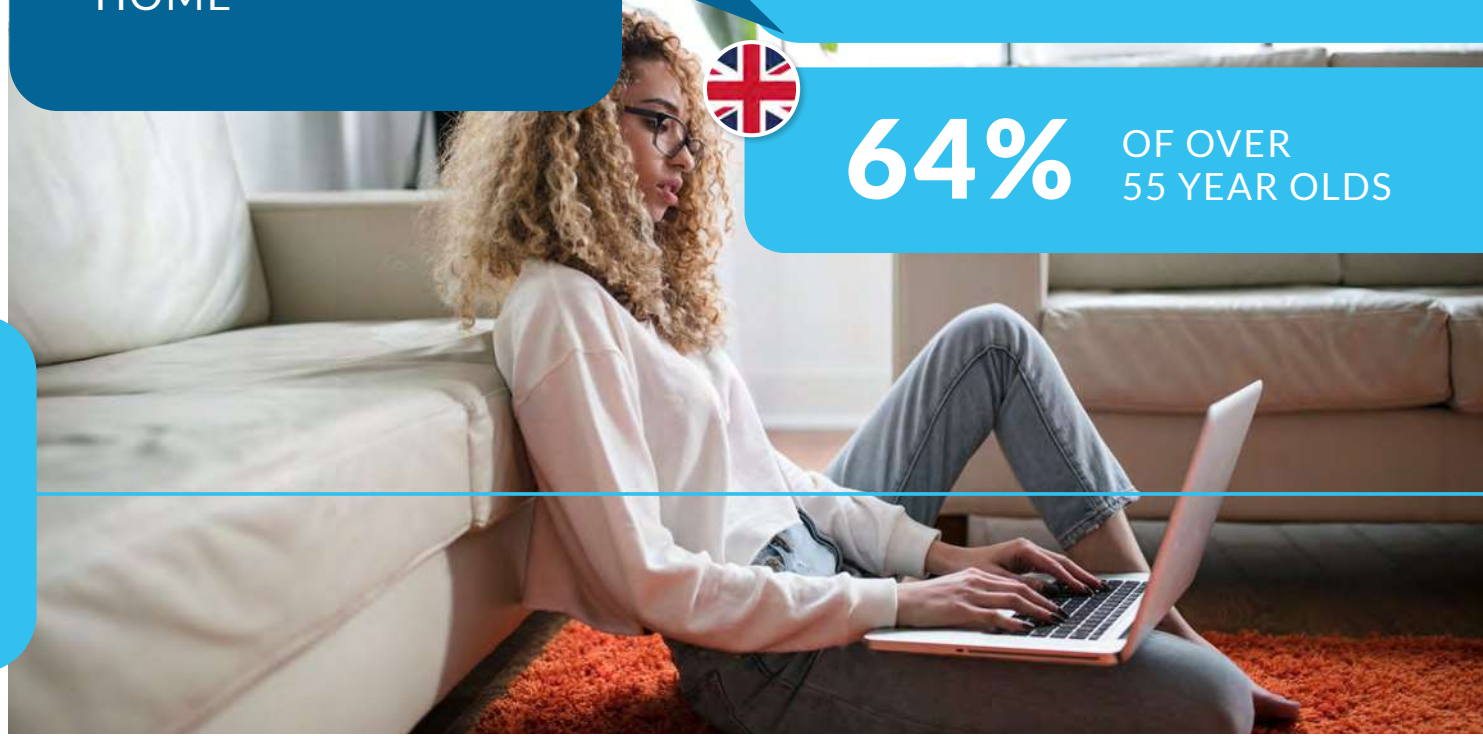


67% OF OVER 55 YEAR OLDS

35% OF 18 TO 24 YEAR OLDS



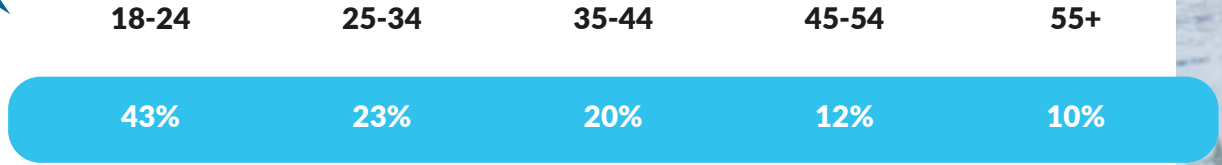
64% OF OVER 55 YEAR OLDS



HOW OFTEN (IF AT ALL) RESPONDENTS FELT STRESSED OR ANXIOUS AS A RESULT OF WORKING FROM HOME



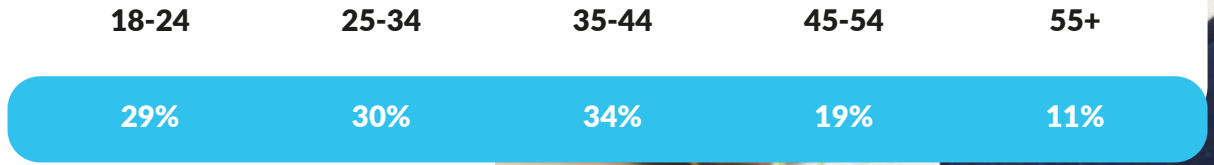
**ALWAYS/
OFTEN**



These findings resonate with the fact that younger people also tended to feel that productivity decreased given the pressures of a home environment. We might draw our own conclusions as to why. Perhaps it suggests younger people rely on office spaces more because they are less likely to have a benign working set-up at home – given they are more likely to be house-sharing with others and confined to a bedroom. Or perhaps it suggests that younger people miss the social aspect of working in an office.

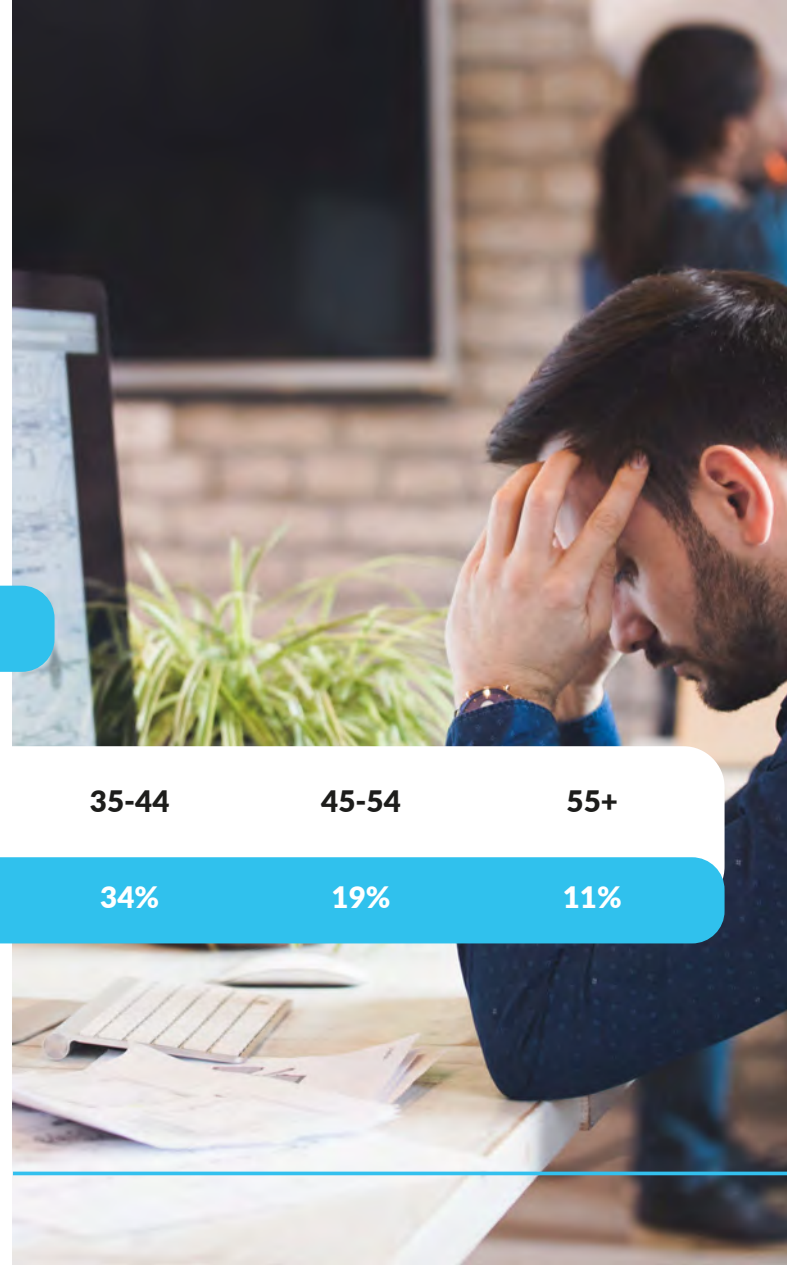


**ALWAYS/
OFTEN**



To a large degree the pandemic has negated the benefits of working remotely. Indeed, more flexible working arrangements are only beneficial if you are able to socialise. And many people have spent time cooped up at home with little outlet – which could impact younger

people disproportionately. But as a more normal functioning of society prevails, reduced commuting costs and more free time could begin to outweigh some of these negatives that are impacting home workers of all ages.



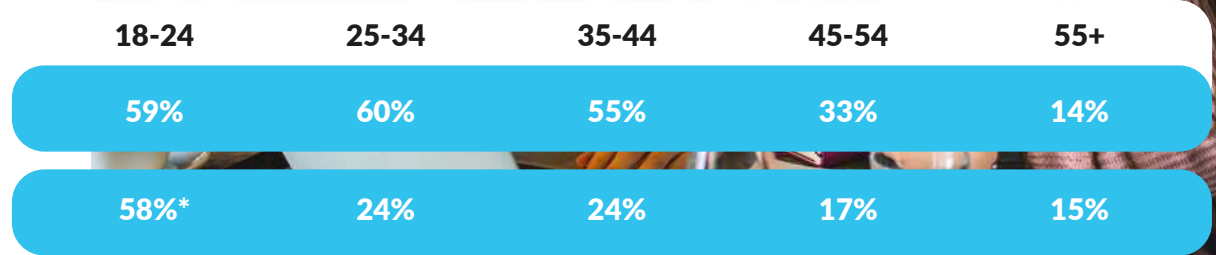
THE USE OF COMMUNITY SPACES IS LIKELY TO RISE

In the US there is already high usage of public spaces for working, with under 44s around 30% likely to have worked from places such as cafes at least sometimes. But in the UK the picture is different. Take up has been relatively negligible, which could boil down to stricter lockdown restrictions in the UK.

Perhaps a better gauge of the importance of public space is the future intent of respondents. Here, around a quarter (24%) of people in the UK said that they would use approved public spaces (such as cafes and dedicated private workspaces) if they were deemed safe and if they were given the facility to book them. When we break this down into age groups, we also see that it is the younger age groups who are far more likely to use community spaces.



**ALWAYS/
OFTEN**



*Note: less than 50 respondents so requires further investigation

HOW OFTEN, IF AT ALL, WOULD RESPONDENTS USE APPROVED LOCAL PUBLIC SPACES (E.G. COFFEE SHOPS, CAFES, BARS, ETC.) THAT WOULD BE SET UP WITH WORKING ENVIRONMENTS AND GOOD WI-FI, IF THEIR EMPLOYER ENABLED THEM TO BOOK?

There is clearly a demand for public space working to support office and home working. The infrastructure in the UK might lag that of the US, which could be a reason that other age groups in the UK were less enthusiastic.

RESPONDENTS (UNDER 24 YEAR OLDS) WHO WOULD USE LOCAL PUBLIC SPACES ALWAYS, OFTEN OR SOMETIMES

58%



59%



If infrastructure catches up with demand, we could see more people of all ages take up private spaces.

Aside from spaces such as cafes, the burgeoning collaborative workspace sub-sector could also provide an answer as critical community hubs that inspire creativity and innovation. In this sense, community spaces of all types certainly have the potential to ease the burdens of working from home more regularly for those that need it.



DOES HOME WORKING MAKE IT DIFFICULT TO MAINTAIN CULTURE AND CONNECTION?

Respondents were split as to whether it was harder to maintaining company culture if most people work remotely. The answers were largely age-dependent and differed quite significantly between the US and UK.

62% over of 55 year olds in the UK agreed that working from home makes maintaining good company culture more difficult. In the US this motion was felt slightly less by over 55 year olds with 46% agreeing.

In the US, younger age groups were also in agreement that maintaining company culture whilst working from home was more difficult. This was especially high for those aged 18-24, with 64% agreeing compared to 46% of over 55 year olds.

In the UK 50% of office workers stated that they felt less connected to their company whilst working from home. In the US this

rose to 55%, with those aged 25-34 more inclined to strongly agree (27%) with the statement.



IN THE UK 50% OF OFFICE WORKERS STATED THEY FELT LESS CONNECTED TO THEIR COMPANY WHILST WORKING FROM HOME

LOCATION PLAYS A ROLE IN THE NEEDS OF A WORKFORCE

We have already seen some evidence that the needs of a workforce are impacted by geography. The differing views in the US and UK on the ability to maintain culture when working from home (previous page) is just one example.

Crucially, we also found there were some other distinct differences in attitude depending on more regional locations of a workforce.

MORE PEOPLE WORKED FROM THE OFFICE DURING THE PANDEMIC IN THE US

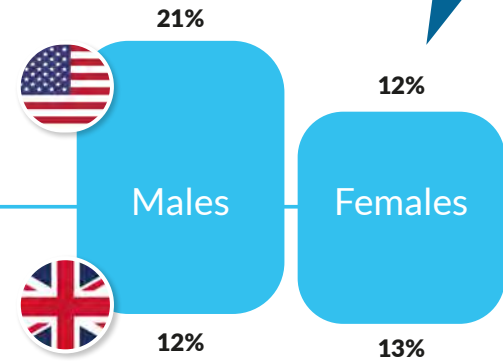
46%



53%



THOSE THAT THOUGHT THE BEST WORKING ENVIRONMENT FOR THEM IS TO RETURN TO THE OFFICE FULL-TIME



All this suggests that companies must consider both country and specific regions when thinking about how a hybrid workplace might work in practice.

CONCLUSION

The findings from our YouGov survey demonstrate two key things. Firstly, that a clear majority are against either a full-time return to the office or a full-time working from home scenario – and thus, a hybrid workplace is the future.

Secondly, the results show that the needs and motivations of workforces are nuanced. There are many competing interests in terms of age, familial status and past habit – as well as factors such as geographical location and gender – that will impact what people want from tomorrow's workspace. In addition, different business functions will also have different needs.

The workplace will be personal and unique to individuals. Given the many different working styles, locations and home pressures, a balanced approach will be required. One that not only ensures everybody gets access to opportunities for progression and promotion, but also that the entire workforce is catered for in cultural

endeavours – and that everyone's well-being is considered.

The mixed nature of this new workplace suggests a blurring of the lines between the digital and physical workplace. Companies must consider the impacts this will have across people and technology. Rather than thinking of the workplace as a relationship between home and office working, we must start to think of it as a unique space – both digital and physical – that meets the needs of every employee and which inspires creativity and productivity.

The use of public spaces also has to be considered. Employees are likely to use these off their own accord, so there must be thought around ensuring such spaces not only fulfil the needs of a workforce but promote wellbeing and culture and meet security and efficiency requirements.

With all this in mind, a one-size fits all approach will not work. We must now think about how we deliver hybrid workplaces in order to realise maximum productivity.



**THE FUTURE OF THE
WORKING ENVIRONMENT
HAS RADICALLY SHIFTED
TO THE HYBRID MODEL**

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