

Changing Expectations and the Future of Work

Insights from the
pandemic to create a
better work experience

About the Study

Steelcase Global Reports study work, workers and the workplace. They explore important issues facing leading organizations today to uncover key insights that can help improve the work experience.

Since the onset of the pandemic, Steelcase has conducted ongoing research to help organizations understand its impact on their people and business. A science-based and data-driven approach uncovers new perspectives about how and where people want to work going forward.

This issue shares the synthesis of eight primary studies designed to measure how the COVID-19 pandemic will change the future of work. The quantitative and qualitative studies deployed methodologies based in the social sciences and were conducted in multiple countries, including over 32,000 cumulative participants.

Steelcase is committed to continuing research to understand what's next and share what we're learning to help make work better.

To receive future issues of the Steelcase Global Report, visit: steelcase.com/subscribe.

Key findings covered in this report include:

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Learning From What People Have Been Through

The extended duration and reach of the global pandemic have changed fundamental patterns in our lives, accelerating existing trends and revealing new unmet needs.

How we shop, entertain, travel and learn are different, and the same is true for the way people work. As the pandemic began, people who could work from home suddenly found themselves in the middle of a massive global experiment, uncovering new insights about what people need — and will expect — to do their best work. Whether they are still at home or have returned to the office, people have learned from what they've been through and are looking to their organizations to create a substantially better work experience than what they had before the pandemic.

Working from home during the pandemic enabled many organizations to sustain business operations — some prospering and others struggling — which led to early speculation that it might become the new default position and that office real estate would be significantly reduced, or even eliminated.

As the pandemic stretched on, it became apparent that working from home is not a one-size-fits-all experience for people, nor is there a single ideal solution for each organization. There are, however, key themes and patterns that have emerged from which organizations can learn and develop new workplace strategies that meet the changing needs and demands of their employees.

Organizations around the world face dramatically different circumstances depending on the state of the pandemic, their locations, industries, cultures and many other variables. Resilience is critical to all of them, and leading organizations are looking to this moment as an opportunity to challenge assumptions and reset the way they work so they can emerge from the crisis stronger, with employees who are energized and engaged.





Working From Home Around the World

The experience of working from home has varied dramatically based on many factors, including geography, industry, job type and job level.

The quality of people's home work space, their caregiving responsibilities, their ability to block out distractions, their individual work styles and their perspective in general have all impacted how they've felt and performed. People who live and work in urban areas, usually with smaller or even shared living spaces, have had different experiences from people in suburban or rural areas.

Overall, in every country, people who were dissatisfied working from home struggled more than others. Organizations can learn from what researchers have discovered about working from home to improve the work experience moving forward.

The Key Benefits and Challenges of Working From Home

People's experience working from home is deeply personal and as diverse as individuals themselves. How people perceive the benefits and challenges of working from home varies significantly, yet the data reveal some consistent issues around the world and patterns that emerge in different countries.

8 of 10

No Commute: Benefit

Not commuting to the office is almost universally the main thing people like about working from home. **Eight out of 10 countries rank the lack of a commute as the top benefit, and it was a close second in China.** Only India ranked it significantly lower. One participant summarized the sentiment of many by saying, "I'm not wasting 45 minutes in a commute. I can go for a run in the morning and then quickly get right into work." Ironically, the thing most people like the best about working from home was not related to their company's workplace, but simply to how long or difficult it is to get there.

The notion that commuting is essentially wasted time is important for organizations to understand as they consider their long-term real estate strategies and flexible work policies. It is equally important to note that some degree of commute can be helpful as it can act as a temporal threshold between work life and home life.

10 of 10

Isolation: Challenge

Everyone everywhere struggles with a feeling of isolation while working from home. In fact, **isolation ranks the highest among participants in all 10 countries** as the leading factor that worsened during mandatory work-from-home orders. It was especially high in Australia, Mexico and Spain — countries that rate isolation twice as worse than any other factors.

Despite all the efficiency-based arguments for embracing a heavy work-from-home strategy, people are social animals and do not thrive when they feel alone. Loneliness was a growing issue before the pandemic, and this has only accelerated over time. Virtual meetings can't replicate the same level of connection people feel when they are together.



Engagement and Productivity: Benefit and Challenge

Engagement and productivity are other key issues, but they are not as straightforward. In seven of the 10 countries studied, engagement is among the top five things that deteriorate while working from home. Productivity rates in the top five as well for every country (with the exception of Mexico which rated it sixth).

Yet, participants also rank their ability to focus and be productive at home in the top five things that have improved (with the exception of Canada, which ranks it sixth). Can both be true? Can employees find working from home both more and less productive?

The divided responses reinforce the notion that working from home is a different experience for everyone and productivity levels are impacted by how people feel. Steelcase researchers found a distinct correlation between people's satisfaction with their work-from-home situation and their engagement, as well as productivity. Both engagement and productivity drop in all countries when people aren't satisfied, and it usually declines further when people have to work from home more frequently.

The level of dissatisfaction with working from home may explain the seemingly contradictory messages that the experience is both better and worse for engagement and productivity. On average, 41% of workers globally are not satisfied with their situation, which means they are more likely to experience drops in both areas.

There are a variety of factors that influence whether people feel productive and satisfied working from home. For example, Steelcase researchers find that, when working from home, common office furnishings, specifically an ergonomic chair, actually help increase productivity — but only 24% of individual contributors in the US have one. This look at the role of furniture and productivity suggests that physical discomfort can be a distraction, taking its toll on people's ability to focus. **The bottom line: it is important people have a place that is distraction-free, where they can focus, regardless of whether they are at home or the office.**

Speed of decision-making, clarity around responsibilities, and work-life balance also suffer as people work from home. All of these are interconnected with the issues of engagement and productivity. If employees feel decisions happen more slowly, are unclear about their work, and have to work longer to accomplish the same amount of work or less, the results can be reduced productivity and less commitment to the organization.

All 10 countries report drops in engagement and productivity when people are dissatisfied with their work-from-home experience. In most cases, engagement and productivity drop more significantly when work-from-home frequency increases.

Work From Home

Benefits and Challenges of Working From Home by Country

People told us the three things they liked most and what got significantly or moderately worse while working from home.

Australia

Benefit

- 1 No Commute
- 2 No Office Distractions
- 3 Ability to Focus + Be Productive

Challenge

- 1 Sense of Isolation
- 2 Productivity
- 3 Engagement

Canada

Benefit

- 1 No Commute
- 2 No Office Distractions
- 3 Better Work-life Balance

Challenge

- 1 Sense of Isolation
- 2 Clarity of Responsibilities
- 3 Engagement

China

Benefit

- 1 Ability to Work in a Range of Settings
- 2 No Commute
- 3 Ability to Focus + Be Productive

Challenge

- 1 Sense of Isolation
- 2 Speed of Decisions
- 3 Productivity

France

Benefit

- 1 No Commute
- 2 Ability to Focus + Be Productive
- 3 Increased Flexibility

Challenge

- 1 Sense of Isolation
- 2 Productivity
- 3 Clarity of Responsibilities

Germany

Benefit

- 1 No Commute
- 2 No Office Distractions
- 3 Ability to Focus + Be Productive

Challenge

- 1 Sense of Isolation
- 2 Speed of Decisions
- 3 Productivity

Benefits and Challenges of Working From Home by Country (continued)

People told us the three things they liked most and what got significantly or moderately worse while working from home.

India

Benefit

- 1 More Time for Health and Fitness
- 2 Better Work-life Balance
- 3 Ability to Focus + Be Productive

Challenge

- 1 Sense of Isolation
- 2 Speed of Decisions
- 3 Work-life Balance

Mexico

Benefit

- 1 No Commute
- 2 Ability to Work in a Range of Settings
- 3 Family Time

Challenge

- 1 Sense of Isolation
- 2 Work-life Balance
- 3 Innovation

Spain

Benefit

- 1 No Commute
- 2 Increased Flexibility
- 3 No Office Distractions

Challenge

- 1 Sense of Isolation
- 2 Work-life Balance
- 3 Innovation

United Kingdom

Benefit

- 1 No Commute
- 2 No Office Distractions
- 3 Work-life Balance

Challenge

- 1 Sense of Isolation
- 2 Engagement
- 3 Speed of Decisions

United States

Benefit

- 1 No Commute
- 2 Ability to Focus + Be Productive
- 3 No Office Distractions

Challenge

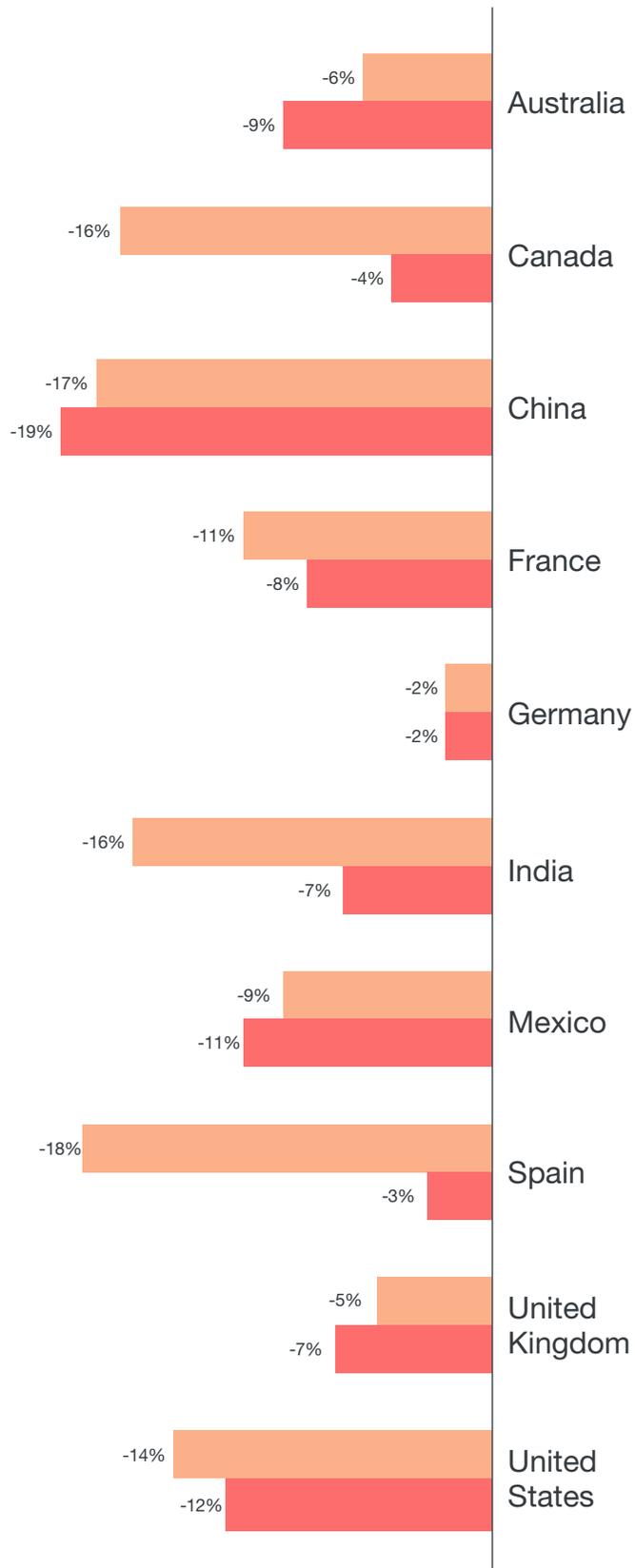
- 1 Sense of Isolation
- 2 Productivity
- 3 Speed of Decisions

Work From Home

Drops in Engagement and Productivity For People Dissatisfied Working From Home

When people are dissatisfied with their work-from-home experience and have to do it more often, they report drops in performance.

- Engagement
- Productivity



Five Patterns of Work-From-Home Experiences

To better understand the nuances of how people feel about working from home, Steelcase researchers augmented quantitative data by interviewing people in North America and Europe for deeper insights. They found the experiences people described fell into **five patterns of behavior and attitudes**.

It's important to note that it's possible for people to associate themselves with more than one of the patterns. They are meant to be extreme categories that can help us understand the different experiences people have had and what their expectations may be when they return to the workplace.



Work From Home



Overworked Caretaker Home office is a nonstop flow of competing demands

This person is torn between meeting work responsibilities and managing family needs. Their long, jam-packed day is chopped between meetings, focus work, homeschooling and domestic chores. Exhaustion and guilt are piling up. They take comfort in finally being allowed to show they are parents and not worry if their kids are heard on a call. They miss the office for the opportunity to leave home responsibilities behind and have control over their attention. But they appreciate the flexibility to work from home as needed to more easily manage between their family and work responsibilities.



Autonomy Seeker Home office is freedom

Thrilled to work at their own rhythm, without someone constantly looking over their shoulder, this person feels just as productive at home as before, if not more. They feel a greater sense of wellbeing at home, where they can look out the window, sit in different postures, cook healthy meals and weave in activities that help them recharge and relax, such as hanging out with their pet. They especially enjoy the level of control they have in designing their own work experience to curate a schedule that braids together life events and work events.



Relieved Self-Preservationist Home office is the only place I am safe

This person's main concern is not COVID; it's their psychological safety. They feel their company is creating a hostile work environment and working from home has been a welcome respite from an organization they feel does not appreciate them. They're less anxious and more productive, able to focus on work, rather than managing relationships. Working from home gives them a more human experience that allows them to work in a space that is their own.



Isolated Zoomer Home office is a lonely cage

This person lives alone without any self-imposed boundaries to keep to a healthy work schedule. They'll return to the office when they trust their employer has taken necessary precautions. They value the office because it offers a way to separate work and life. Days are spent on back-to-back Zoom calls, and despite constant interaction, they feel disconnected. They miss daily social interactions with their colleagues — a major reason they come to the office. Relationships and their support system at work make it easier to navigate challenges.



Frustrated Creative Networker Home office is a suspension from normal life and work

These individuals are conflicted about returning to the office. They spend most of their day co-creating, coaching, persuading and connecting the dots — work done much better in the office, especially with larger groups. But although they desire the benefits of the office, they don't think it's safe to return. They have quickly adapted the use of digital tools, but they crave more — virtual meeting technology is still too limited for creative collaboration and informal, spontaneous connections across silos. COVID has been a huge challenge when they suddenly found themselves cut off from in-person interactions that drive their work. With limited tools and a lack of experience in making them work, they have shifted focus to more individual tasks done more easily from home.



The First Wave of Workplace Change: The Hybrid Future

While some headlines suggest the office will go away as people embrace working from home almost exclusively, the research identifies a more nuanced, hybrid future. Most people expect to work in the office most of the time, but they also expect greater flexibility from their organizations going forward.

A More Flexible Approach to Work

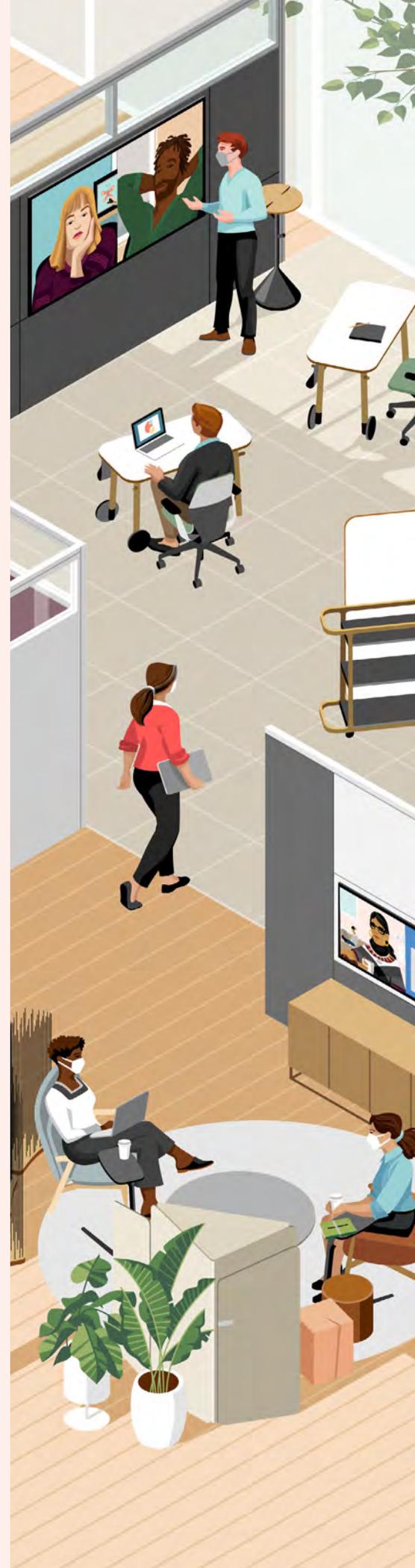
The global experiment in working from home has shown it can be part of a viable work policy, but it requires each organization to consider its own culture, processes, technology infrastructure and real estate strategies.

After spending months working from home, people expect to be allowed to continue in some capacity. How often they expect to do it differs significantly, which means leaders need to consider what policy is right for individuals, teams and the organization overall.

The majority of people say they expect to spend more time working in the office than at home and do not expect to work at home every day. In most countries, the majority say they expect to work from home one day a week or less.

People in France and Germany, which have strong office-based work cultures, are least likely to expect to work from home. People in India and Mexico, on the other hand, expect to work from home more frequently. A word of caution to leaders in those countries: Both countries experienced significant productivity and engagement drops the longer people who were dissatisfied working from home did so, indicating the need for careful consideration of what work-from-home policy is best.

The majority of people say they expect to spend more time working in the office than at home and do not expect to work at home every day.



Workplace Change

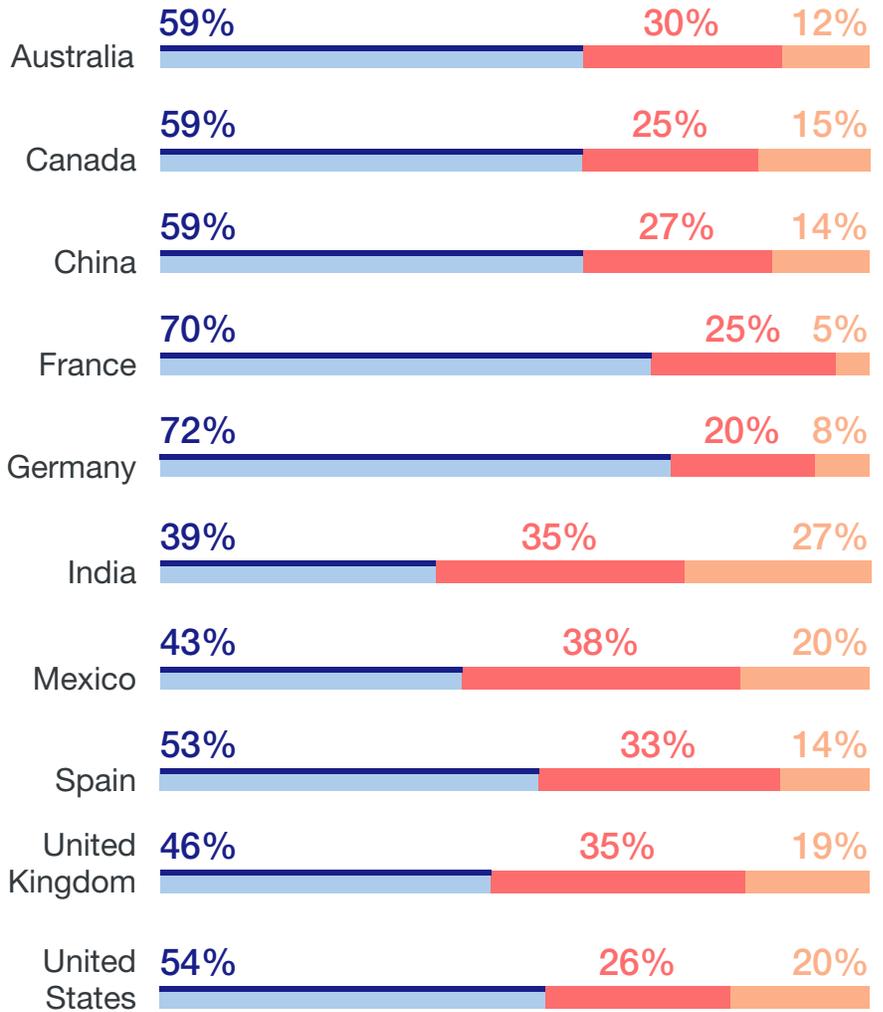
How Often People Expect to Work From Home

The majority of people in most countries expect to work from home one day a week or less post-pandemic.

- 1 day a week or less
- 2-3 days a week
- 4-5 days a week

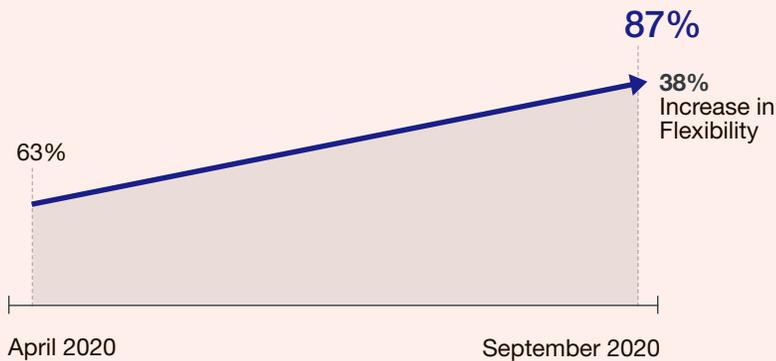
Note: Due to rounding, all countries do not add up to 100%.

© **Noteworthy:** People in France and Germany expect to work from home the least. People in India expect to work from home the most.



Leaders Anticipate More Flexibility

As people expect working from home to be an option, more organizations are listening and responding. Early in the pandemic, many leaders did not see a need to change their policies, but now 87% of leaders around the world say they expect they will allow more flexibility about where, when and how people work — which is a 38% increase from April 2020. More companies in more countries are allowing for the increase of flexible work policies.



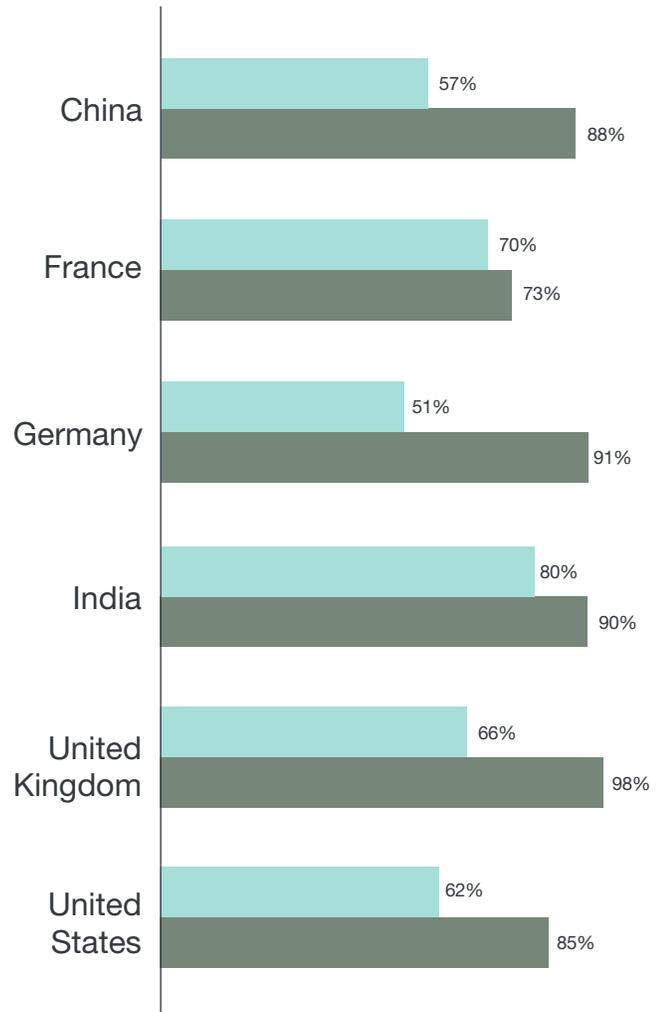
Workplace Change

Leaders Expect More Flexible Work Policies

Responses indicate growth in the number of leaders who expect employees will have more choice and control to work from home or elsewhere post-pandemic.

- April 2020
- September 2020

Note: Study conducted in only six countries. Countries not included: Australia, Canada, Mexico and Spain.



The Emerging Hybrid Model

The global experiment in working from home is shifting to become an experiment in hybrid work. As organizations consider the right approach for their people and their culture, predictions that people will work exclusively from home are being passed over for more flexible options.

In fact, the number of organizations that expect people will work from home exclusively only increased 2% globally since the beginning of the pandemic. Nearly a quarter of all businesses will continue to work in the office as the primary destination, and the majority of organizations will take a hybrid approach to work, in which employees work from home or a third place, and the office.

Some organizations are considering a range of options beyond their primary offices or campuses. Given that the lack of commute is the number one reason people like working from home, organizations are beginning to explore options for people to work closer to their homes, such as satellite offices or co-working facilities. Leaders who plan to embrace more working from home options in their organizations are considering a mix of buying, building, leasing or private co-working options.

Nearly a quarter of all businesses will continue to work in the office as the primary destination, and the majority of organizations will take a hybrid approach to work, in which employees work from both home and the office.



23%
In Office



72%
Hybrid



5%
Work From Home

Note: Percentages indicate global averages.

Workplace Change

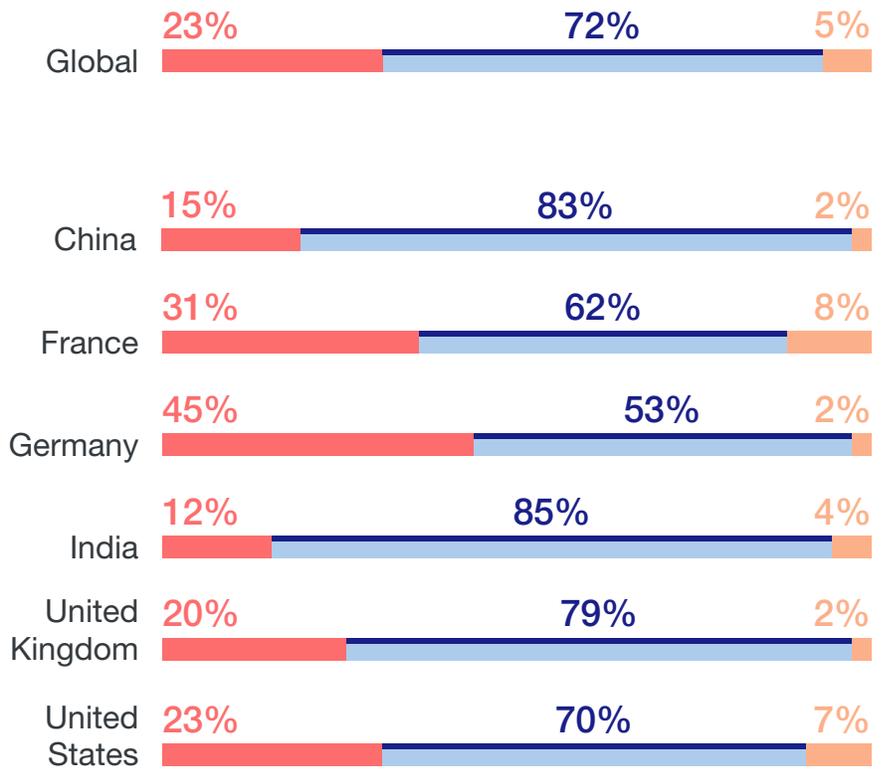
Leaders Anticipate More Hybrid Work

When asked in September 2020 what their expectations are for work post-pandemic, most leaders see three main approaches — with many considering a hybrid model in which some time is spent in the office and some at home or a third place.

- In Office
- Hybrid
- Work From Home

Note: Study conducted in only six countries. Countries not included: Australia, Canada, Mexico and Spain.

© **Noteworthy:** Just as people in France and Germany are less likely to expect to work at home, their leaders agree, saying more people will work predominantly in the office. India, China and the UK are much more likely to embrace a hybrid model, with people working from home more often.



Changing Employee Expectations

After spending months at home during a crisis, workers have never been more in touch with what they want from their work and workplace. They have new and increased expectations of their employers and workplaces — desiring a dramatically different and better experience than the one they left.

A synthesis of multiple Steelcase studies identified five critical employee needs that will change the overall work experience. Many of these were emerging before the pandemic, but the time spent working from home accelerated the awareness and importance of each.

Five Critical Elements:

- Safety
- Belonging
- Productivity
- Comfort
- Control

Safety

For people to feel comfortable returning to the office, they need to both be safe and feel safe. They are pandemic-aware, and people in every country rate a new set of safety issues as their top concerns about returning to the office, with a strong emphasis on mitigating the spread of disease.

Air quality, the adherence to safety protocols and general cleanliness rank among the most important safety considerations. It's clear people will need to feel confident that their workplaces are safe and to trust their employers and peers are doing everything possible to keep them safe before returning.

“I am trying to choose my days to be in the office. Certain days have more people present, and I am finding that they don't always follow the rules. There gets to be a closeness that makes me feel uneasy... the more people, the more risk.”

Study Participant



Changing Employee Expectations

New Health and Safety Priorities

People were asked what would make them comfortable returning to the workplace. They were given eight factors and asked to rate each based on how important it was for their return.

Each factor is ranked per country with 1 being the most highly ranked and 8 being the least highly ranked.

- 1 Most Highly Ranked
- 2
- 3
- 4
- 5
- 6
- 7
- 8 Least Highly Ranked

© *Noteworthy: Air Quality, Adherence to Safety Protocols and Facility Cleanliness rank among the most important safety considerations in almost every country.*

	AU	CA	CN	FR	DE	IN	MX	ES	UK	US
Adherence to Safety Protocols	1	1	2	1	3	1	1	1	1	2
Air Quality	5	2	4	3	1	2	2	2	3	1
Facility Cleanliness	3	3	1	5	2	4	3	5	2	3
Physical Distancing / Boundaries	2	4	3	2	4	5	4	3	5	4
Visitor Protocols	6	5	5	4	5	3	5	4	6	6
Overall Density of People Within the Building	4	6	6	6	8	7	7	6	4	5
Safe Access to Food and Beverages	7	7	7	8	7	6	8	8	8	7
Availability of Informal Gathering Areas	8	8	8	7	6	8	6	7	7	8

Belonging

People have a basic need to belong — it's fundamentally hardwired in our DNA and something people were searching for pre-pandemic. At the same time, the coronavirus has left people feeling extremely isolated, and the need to feel part of a community at work has never been more important.

In every country, people rank connection to people and purpose among the top reasons for wanting to return to the workplace.

Research measured community — using metrics around purpose, belonging, resilience, trust and inclusivity — and identified how community correlates to the workplace. Community not only contributes to people's wellbeing, it leads to better business outcomes as well. **People feeling part of a community is a top predictor of higher scores in productivity, engagement, innovation and commitment.**

Creating community while people are not able to be together requires significant effort, and the more extensively people work from home, the greater the challenge. People who worked from home more often report weaker scores on a variety

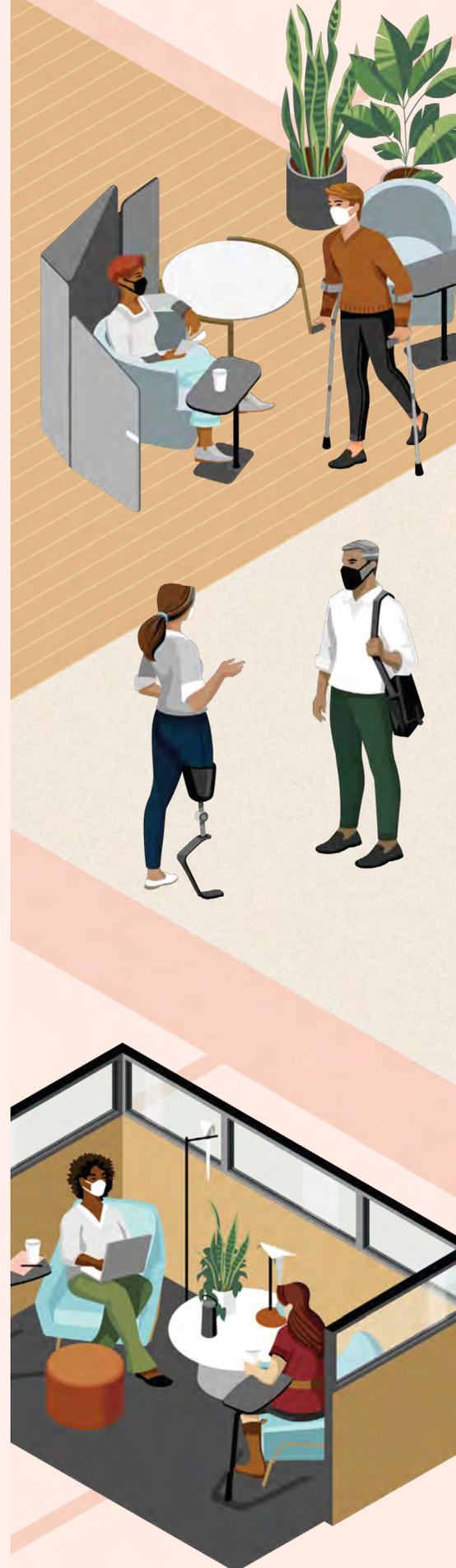
of community metrics. The reverse is also true — the less people work from home, the higher their sense of community.

The workplace can be designed to help foster a sense of community, and there are three specific attributes that make a positive impact across all countries studied:

- The office has places where leaders are present and accessible.
- There are spaces that foster social interaction and help build a sense of belonging.
- The workplace offers stimulating and inspiring areas that promote ideation and creative problem-solving.

“What I look forward to is having lunch with my co-workers. I had a group that I normally ate with. Also, mentorship is very important to me — so I was consistently seeking out people to go to coffee with. It's much harder to have a Zoom coffee chat.”

Study Participant



Changing Employee Expectations

Top 5 Reasons People Want to Return to the Workplace

People ranked their top five reasons for wanting to return to the workplace out of multiple factors.

- 1 Most Highly Ranked
- 2
- 3
- 4
- 5 Least Highly Ranked

	AU	CA	CN	FR	DE	IN	MX	ES	UK	US
Reconnect with Colleagues	1	1	4	1	1	4	2	1	1	1
Reconnection to the Org. and Shared Purpose	2	5	2	2	5	2		3	2	2
Work in a Quiet, Professional Environment	4	3	3	4	4	1	1	5		3
Collaborate in Person	3	2	5		3		4	4	3	4
Access to Tools and Technology	5	4		5			3		4	
Access to Paper and Files				3			5	2		5
Work in a Larger Setting with More Diverse Spaces			1			5				
Connection or Visibility to Leadership					2	3				
Want a Change in Scenery									5	

Productivity

People want to feel that what they do is meaningful, and this has been amplified during the crisis as organizations have needed to respond to dramatically changing business conditions.

Pre-pandemic, people struggled in offices if they didn't have the right levels of privacy to allow them to do focused work. Now, there's a lot of conjecture that people will come back to the office solely for group activities and collaboration. **But the data show employees and leaders want workplaces to support individual focus work as well as collaboration.**

Creative work, solving complex problems and innovation all require an ebb and flow between "me" and "we" work, which means the workplace has to provide spaces for both that make it easy to transition between the different work modes.

Employees, more so than leaders in many countries, express a need for the office to provide places to focus, potentially because their home environments are less likely to be the same size or have the same amenities, such as a desk, ergonomic chair and secondary monitor, as most executives have in their homes.

“I don't feel like we get into the insights we want working remotely. It's very hard to communicate organically. If you're physically in a room, you can write stuff down and read people's body language better. I find we end up just skimming the surface (working from home).”

Study Participant



Changing Employee Expectations

What People Want Most in Their Office Going Forward

People ranked the five most important elements the workplace should provide when they return.

© *Noteworthy: Only France and Spain fail to list Focus in the top five. Researchers point to the fact that people in Spain felt more isolated than in any other country while working from home and that lockdown measures in France were extreme, causing both countries to consider connecting with others most important.*

Australia Leaders: Rejuvenation, Access to Tools and Ability to Schedule Spaces were also tied with Focus, Socialization, Host Clients and Workplace Culture.

Canada Leaders: Range of Spaces and Hosting Clients also tied with Socialization, Learning and Focus.

France Leaders: Rejuvenation and Workplace Belonging were also tied with Team Belonging and Collaboration.

Australia

Employees

- 1 Collaboration
- 2 Team Belonging
- 3 Access to Tools
- 4 Workplace Culture
- 5 Focus

Leaders

- 1 Learning
- 2 Focus
- 3 Socialization
- 4 Host Clients
- 5 Workplace Culture

Canada

Employees

- 1 Collaboration
- 2 Team Belonging
- 3 Focus
- 4 Access to Tools
- 5 Workplace Belonging

Leaders

- 1 Collaboration
- 2 Access to Tools
- 3 Socialization
- 4 Learning
- 5 Focus

China

Employees

- 1 Collaboration
- 2 Socialization
- 3 Rejuvenation
- 4 Focus
- 5 Access to Tools

Leaders

- 1 Collaboration
- 2 Career Development
- 3 Learning
- 4 Socialization
- 5 Access to Tools

France

Employees

- 1 Collaboration
- 2 Socialization
- 3 Access to Tools
- 4 Team Belonging
- 5 Host Clients

Leaders

- 1 Socialization
- 2 Expand, Foster Network
- 3 Host Clients
- 4 Team Belonging
- 5 Collaboration

Changing Employee Expectations

What People Want Most in Their Office Going Forward (continued)

People ranked the five most important elements the workplace should provide when they return.

🕒 **Noteworthy:**
Germany Leaders: Learning, Workplace Belonging and Range of Inspiring Spaces all tied with Expand, Foster Network and Focus.

Spain Leaders: Socialization tied with Learning and Collaboration.

Germany

Employees

- 1 Socialization
- 2 Collaboration
- 3 Access to Tools
- 4 Focus
- 5 Team Belonging

Leaders

- 1 Career Development
- 2 Team Belonging
- 3 Access to Tools
- 4 Expand, Foster Network 🕒
- 5 Focus 🕒

India

Employees

- 1 Learning
- 2 Collaboration
- 3 Access to Tools
- 4 Workplace Culture
- 5 Career Development

Leaders

- 1 Collaboration
- 2 Access to Tools
- 3 Learning
- 4 Team Belonging
- 5 Career Development

Mexico

Employees

- 1 Learning
- 2 Collaboration
- 3 Access to Tools
- 4 Career Development
- 5 Host Clients

Leaders

- 1 Career Development
- 2 Access to Tools
- 3 Expand, Foster Network
- 4 Team Belonging
- 5 Host Clients

Spain

Employees

- 1 Collaboration
- 2 Socialization
- 3 Access to Tools
- 4 Learning
- 5 Host Clients

Leaders

- 1 Host Clients
- 2 Access to Tools
- 3 Team Belonging
- 4 Learning 🕒
- 5 Collaboration 🕒

Changing Employee Expectations

What People Want Most in Their Office Going Forward (continued)

People ranked the five most important elements the workplace should provide when they return.

📍 **Noteworthy:**
United Kingdom Leaders: Learning, a Range of Inspiring Workspaces, Workplace Belonging, Host Clients and Access to Tools were tied with Collaboration.

United Kingdom Employees

- 1 Team Belonging
- 2 Collaboration
- 3 Access to Tools
- 4 Focus
- 5 Workplace Culture

United States Employees

- 1 Collaboration
- 2 Access to Tools
- 3 Focus
- 4 Team Belonging
- 5 Workplace Belonging

Leaders

- 1 Career Development
- 2 Socialization
- 3 Team Belonging
- 4 Workplace Culture
- 5 Collaboration 📍

Leaders

- 1 Collaboration
- 2 Host Clients
- 3 Expand, Foster Network
- 4 Focus
- 5 Socialization

Comfort

People are more deeply aware of their physical, cognitive and emotional needs for comfort and wellbeing, and they expect organizations to address them when they return to the office.

Those who have been comfortable at home, whether it be because they enjoyed a more relaxed environment or had created a space to work that fits their preferences, want that to continue in the office.

Those who've been uncomfortable working from home are looking forward to an office designed holistically to support their comfort. They are now more acutely aware of their physical aches and pains after working from sofas, kitchen counters and even beds at home.

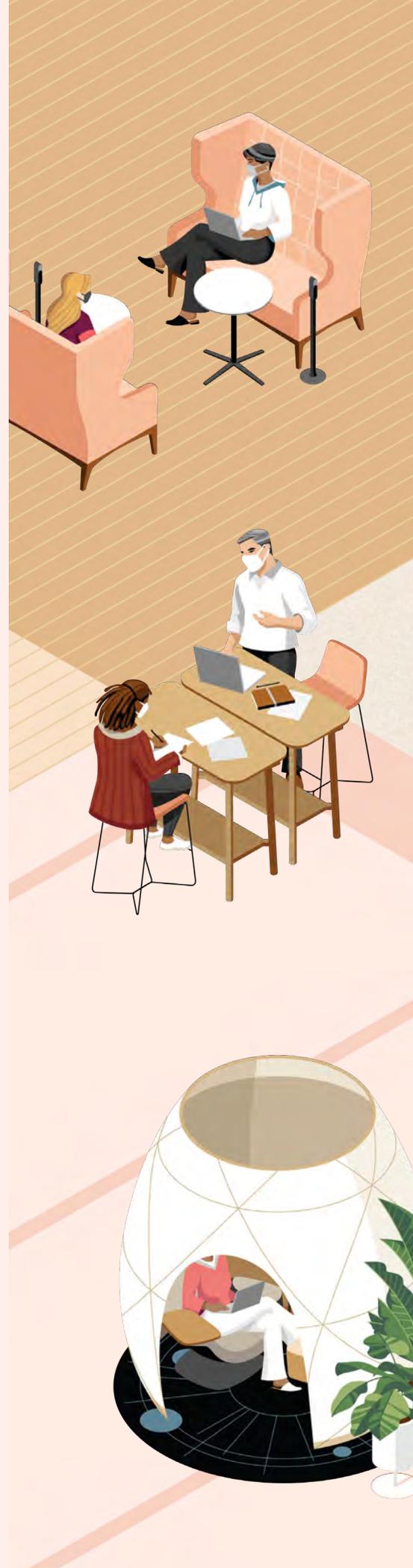
Ergonomic discomfort was a top issue that people in most countries said hurt their ability to get work done at home. Cognitive and emotional issues like distractions, caring for others, and problems with technology and tools that made work more difficult were major concerns across many countries as well.

Cognitively, nine of 10 countries rank a “quiet, professional environment” in their top five reasons for wanting to return to the workplace. Noise, visual distractions or even the lure of household chores are consistent challenges when working from home.

Emotionally, one of the most important things people want the organization to provide when they return to the workplace is an increased sense of belonging to their team, a connection to the company culture and the ability to socialize. Germany, France, Spain and China all ranked socialization especially high, possibly due to rigorous restrictions around social gatherings throughout the pandemic.

“Everything felt very temporary until it didn't. My standing table, my foldable table, felt OK until it was a month and a half in and my back was killing me. My barstool felt OK until I realized I was hunched over all day and I needed a different solution.”

Study Participant



Changing Employee Expectations

What Hurts Productivity at Home

People were asked to pick the top three things that negatively impacted their productivity while working from home.

🕒 **Noteworthy:**

In Canada, tied for third: Setting Up and Changing My Work Environment, Noise Distractions and Visual Distractions

In India, tied for third: Setting Up and Changing My Work Environment

Australia

- 1 Ergonomic Discomfort
- 2 Technology + Tools Issues
- 3 Noise Distractions

India

- 1 Caring for Others
- 2 Technology + Tools Issues
- 3 Noise Distractions 🕒

Canada

- 1 Ergonomic Discomfort
- 2 Technology + Tools Issues
- 3 Caring for Others 🕒

Mexico

- 1 Noise Distractions
- 2 Visual Distractions
- 3 Caring for Others

China

- 1 Technology + Tools Issues
- 2 Setting Up and Changing My Work Environment
- 3 Caring for Others

Spain

- 1 Ergonomic Discomfort/
Caring For Others (tied)
- 2 Setting Up and Changing My Work Environment
- 3 Noise Distractions

France

- 1 Technology + Tools Issues
- 2 Ergonomic Discomfort
- 3 Caring for Others

United Kingdom

- 1 Ergonomic Discomfort
- 2 Setting Up and Changing My Work Environment
- 3 Visual Distractions

Germany

- 1 Ergonomic Discomfort
- 2 Noise Distractions
- 3 Setting Up and Changing My Work Environment

United States

- 1 Caring for Others
- 2 Technology + Tools Issues
- 3 Setting Up and Changing My Work Environment

Control

While being at home all day has its drawbacks, many people feel they have more control navigating their day at home than they do in the office. They are free to choose if they work from a dedicated office or sit on the sofa or outside, and they often have more choice to integrate aspects of their personal lives throughout their day, such as exercising or interacting with family, friends or pets.

In addition to no commute, another aspect of working from home that is highly rated by most participants is increased flexibility. They also feel their work-life balance and level of autonomy improves.

Moving forward, people will want the same level of control over their work lives that they have at home — control over where they work and their environment in the office.



Control (continued)

Organizations are listening to employees' increased desire to have more control over where they work. Eighty-seven percent of global leaders agree they will offer more choice and control for employees to work from home or elsewhere post-COVID. That's an increase of 38% from April to September 2020, indicating leaders are paying more attention to what employees want.

In addition to location, people in every country enjoy having access to a range of spaces at home (such as a couch, desk, table and the outdoors) and want diverse options in the office. This is especially true in China and Mexico, where employees particularly appear to value alternatives to working at a desk and chair all day long.

Other research conducted in the US before the pandemic underscores that people want more control within their work area. Two-thirds of people

with assigned workstations spend 70% of their time at their desk. They value a standing-height desk, but they want more ways to move and achieve a variety of postures.

In another study, 54% of people said they want to be able to reconfigure their furniture, but only 38% can. This impacts people's physical, cognitive and emotional comfort — neuroscience has found a well-established relationship between physical activity, creativity and learning.

The ability to move desks, technology or boundaries can help give people the visual and territorial privacy they need to focus. And with the pandemic in mind, people want to control their proximity to other people as well.

“The thought of sitting in another beige cubicle staring at a grey wall is like a gut punch. When you do that for eight or nine hours a day, five days a week, it's really dreary. I'd rather look out the window next to my nice big couch with a dog on my lap.”

Study Participant

In the Office

54%

of people want to be able to reconfigure their furniture

Yet, only

38%

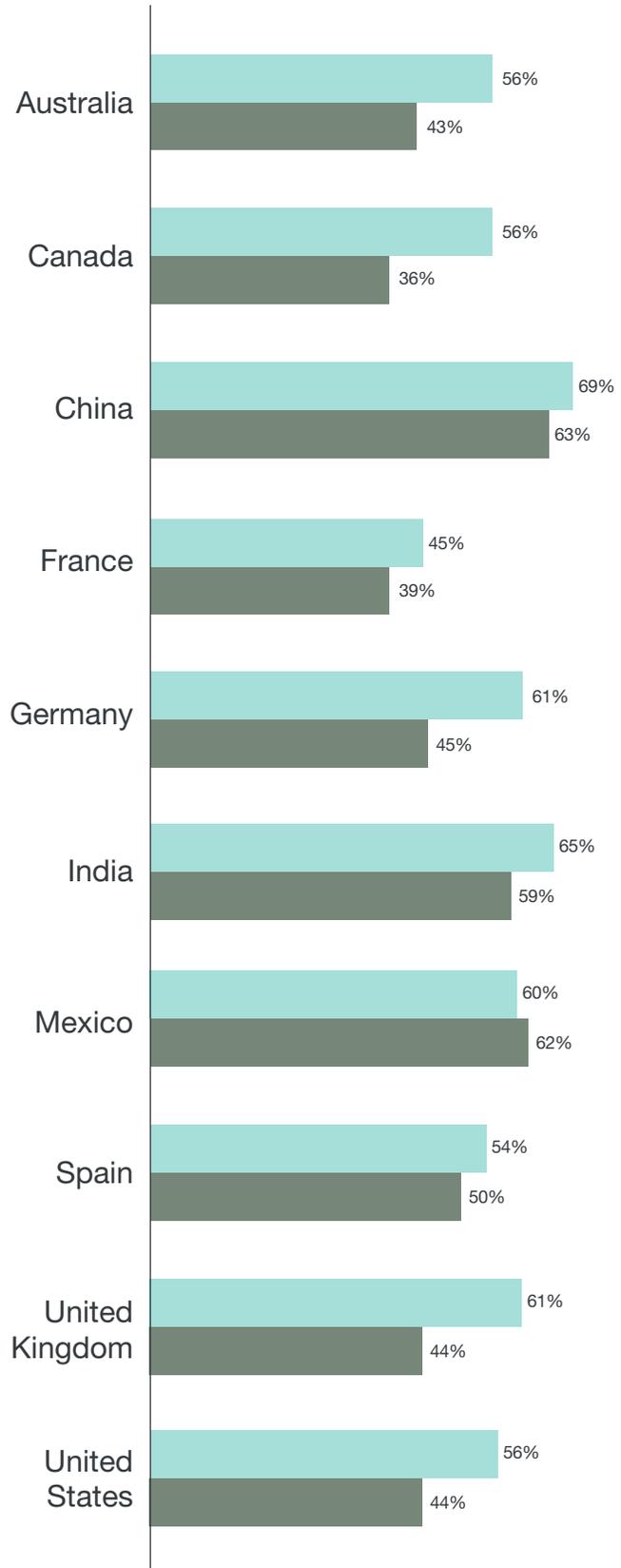
of people report being able to do so

People Expect More Control After Working From Home

In every country people ranked autonomy and work-life balance as things that improved while working from home. Going forward, they will expect more control over where and how they work. Percentages indicate the number of people who said these factors moderately or significantly improved.

- Work-life Balance
- Autonomy

📌 *Noteworthy: While almost every country ranked work-life balance and autonomy as their two biggest improvements, India and Mexico also included the ability to innovate in their top three.*





Four Macro Shifts Organizations Need to Address

Design for Safety
Design for Productivity
Design to Inspire Community
Design for Flexibility

People's experiences during the pandemic have caused new and heightened expectations that organizations will need to understand and address when their employees return to the workplace. Prior to the pandemic, expectations had already begun to change, and the crisis has accelerated the need to create better workplaces. The synthesis of Steelcase research identified four macro shifts leaders will need to embrace to create safe and compelling places where people can be engaged and productive.

Design for Safety

It's clear from the research that people's most pressing concerns about returning to the office are about safety. Employees will need to feel their employer is doing everything possible to keep them safe. **To be inclusive, organizations will need a holistic safety strategy that considers everyone's safety, regardless of age, abilities or health issues.**

Pre-pandemic, when organizations addressed safety in the workplace, their focus was primarily on occupational health and safety standards. Now, they will need to take a multifaceted, systemic approach that prioritizes mitigating the spread of disease. This will require well-documented behavioral protocols, such as mask wearing and social distancing. It will also require organizations to understand how airborne viruses move through an office environment and what happens when exhalations from breathing, talking or laughing encounter different structures and materials.

Even after a vaccine becomes widely available, by addressing these new safety elements organizations will be better prepared for any future crises.

This growing awareness of disease transmission will fuel an ongoing demand for workplaces to help detect, prevent and mitigate the spread of illnesses while also creating an inspiring environment where people will want to work.



Four Macro Shifts

New safety elements organizations should consider:

Air quality

HVAC systems will need to consider more than just temperature. They will also need to control humidity, filtration, air dilution and air movement. When weather permits, organizations should consider the addition of high-performing outdoor spaces for focus and collaboration, and not just socialization, in addition to helping to reduce risk.

Density

New criteria for density should be adhered to. Flexible floorplans can meet the density requirements during the pandemic and then be adjusted post pandemic, as density requirements change.

Geometry

Desking should be reconfigured to reduce face-to-face orientation where there are no barriers.

Division

If distancing is not possible, research indicates workstation screens measurably reduce the range of forward projection of pathogens and can be a viable part of a safety strategy. Use hard or fabric barriers in locations where forward projection of exhalations are most likely.

Materiality

Cleanability and safety concerns are new performance criteria for materiality. Pure or engineered materials that allow for cleaning and disinfection without degrading over time will become the new standard, as will smooth surfaces that are easy to clean and fabrics that can be cleaned or washed and don't degrade with continuous cleaning. But keep in mind, many materials are available that offer both cleanability and inspiration and don't create a sterile environment.

Sanitation

Make cleaning highly visible so employees are assured that spaces are being cleaned regularly. Make cleaning wipes and sanitizer accessible to everyone everywhere, and ask employees to clean before and after using shared spaces. As a reminder, use signage to promote personal hygiene.

Sensors

Use sensor technology to better understand and control occupancy, cleaning frequency and see where, when and how often spaces are being utilized.

Hands-free

Introduce hands-free devices wherever possible (doors, faucets, room scheduling, etc.).

Feeling safe

Make efforts visible to give people confidence everything is being done to prevent exposure to disease. Also, give people more control over their space, including individual physical boundaries, so they can make personal choices about where they feel most safe.



Design for Productivity

Pre-pandemic, many organizations focused primarily on efficiency when planning their offices and designed spaces for single purposes and modes of work. In addition, some open plan offices were heavily criticized for not supporting people's need for focus. **Moving forward, organizations will benefit from creating multimodal spaces that support collaboration and focus work equally.**

The workplace can't simply be a social hub that brings people together with the expectation that individual work will happen at home. Research tells us this is not an inclusive strategy since many people struggle to focus at home. It must provide places where people can work together, as well as places where they can do individual, focused work.

To meet the needs of all types of work, the workplace will need to support:

In-person collaboration

People need high-performing spaces that provide access to the tools and technology they need to collaborate effectively. They also need to be able to quickly switch between individual and group tasks. It's the ebb and flow between these two modes of work that results in innovation.

Virtual collaboration

The need to accommodate remote participation will become the norm, as people travel less and some team members continue to work from home regularly. People will need access to personal spaces that minimize disruptions from video meetings and large-scale collaboration devices to allow for more natural and equal participation.

Privacy

Prior to the pandemic, people were very vocal about the lack of privacy in open plan offices. While working from home has given some people the privacy they desperately needed to get work done, others have continued to struggle — unable to get away from other activities happening in their home. The workplace will need to provide individual and group spaces where people can control visual, acoustical and territorial privacy.

Movement

Studies prove movement enhances creative ideation and allows for more equal participation. When people can physically move around in collaboration spaces and have the ability to move tools such as whiteboards, tackable boards or digital devices, they are better able to solve complex problems.



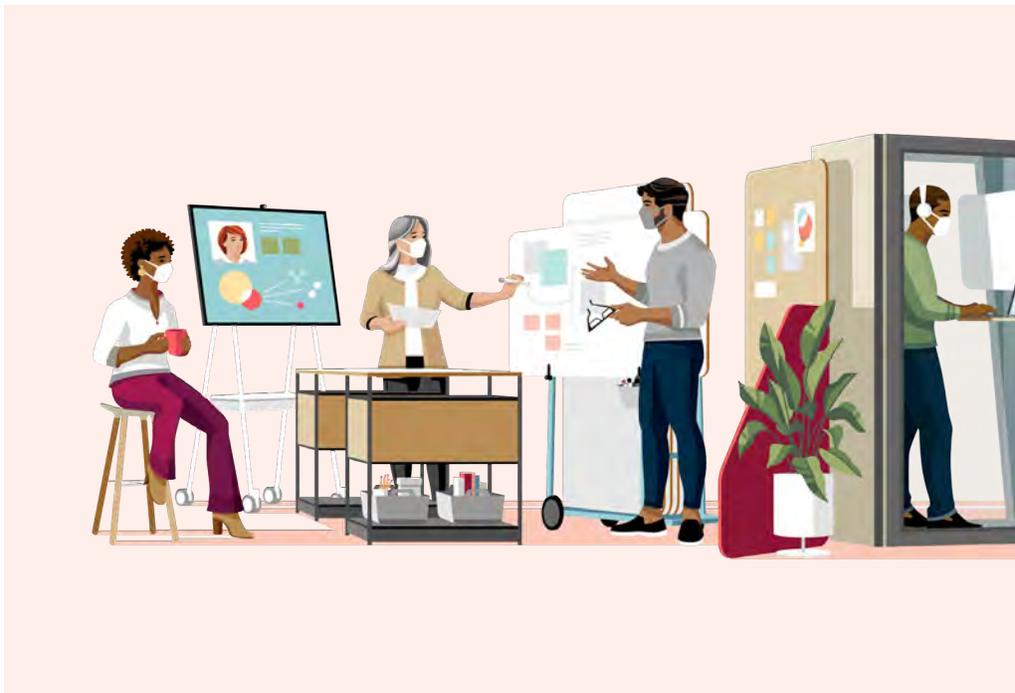
Design to Inspire Community

For many years, organizations have realized the power an aesthetically pleasing workplace can have to attract and retain talent. **But moving forward, the workplace will also need to do a better job at inspiring people and building a strong community.** It will have to provide the touches of humanity and warmth people are seeking to counter safety precautions organizations have needed to deploy.

Working from home has been an isolating and lonely experience for many people, and the need for community has never been more critical.

According to the research, people say the top two reasons they want to return to the office is to see work friends and interact with teammates, citing video meetings are not enough to overcome loneliness and isolation. They also want the workplace to help them feel a sense of belonging and give them access to a range of inspiring workspaces.

Organizations will need to rethink the purpose of the office from simply a place to work to becoming the infrastructure for building social capital and fostering a sense of purpose and belonging.



Four Macro Shifts



Spaces will have to be designed to support:

Vitality

While design elements will have to respect physical distancing requirements, the overall vibe and atmosphere of the workplace needs to create positive energy and be vibrant.

Inclusivity

The workplace will need to consider people's diverse needs and workstyles (physical, neurodiverse, introvert vs. extrovert, etc.), as well as support distributed work, as more people have the ability to work remotely.

Trust

Communication between employees and leaders has never been more critical. The workplace will need to foster transparency and make leaders more visible and accessible.

Resilience

Workplaces will need to communicate to people that change and adaptation are key elements of their organization's culture and they are ready to adapt to any future crises.

Environmental and social impact

People want to feel their organization shares their values. Commitments to the environment, a belief in social responsibility and support of strong governance principles (ESG) will impact priorities and actions.

Design for Flexibility

The pre-pandemic office was based on long-standing paradigms with spaces that were mostly fixed and designed for permanence. But this approach is problematic; these spaces cannot adapt easily when conditions change, such as when a pandemic happens or new ways of working emerge.

Going forward, organizations need to design spaces that can be easily adapted, especially as more flexible work policies are implemented.

The workplace must be designed to provide individuals and teams greater control over their environment so they can change it on demand.

When people return to the office, they will expect greater control, more choices, and access to the right tools and technology that will help them be more engaged and productive.

To allow for greater flexibility, the workplace will need to be:

Multi-use

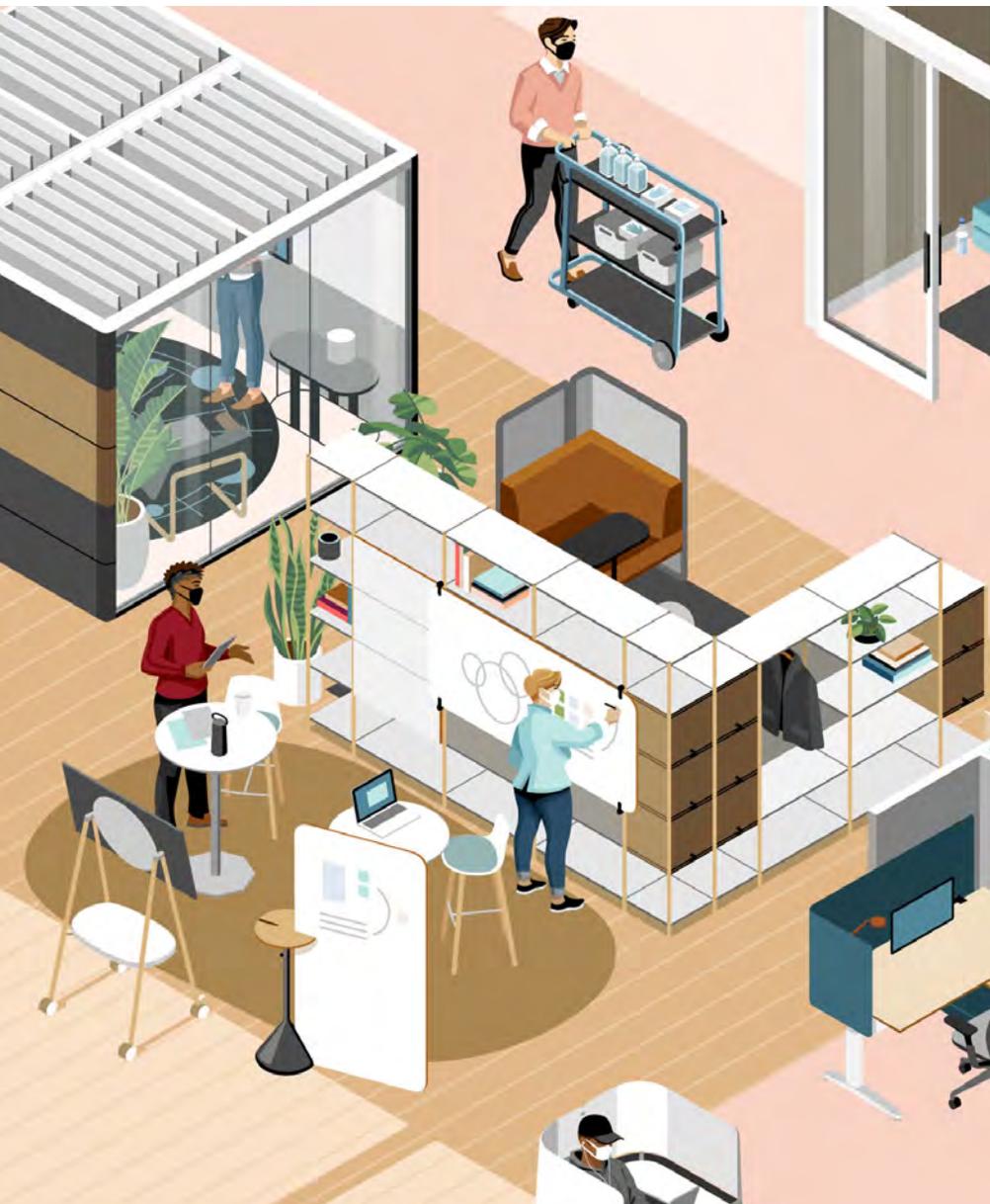
Flexible architectural elements, rather than permanent walls, allow building interiors to support a greater variety of uses.

Multimodal

Maximize real estate by designing spaces to support more than one mode of work. For example, a cafe can also become a high-performance collaboration space and a training room can be transformed into a meeting space for large team functions.

Movable

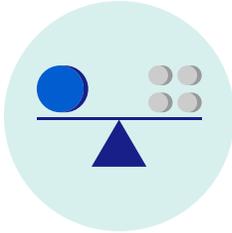
Furnishings that easily move, such as mobile whiteboards, digital displays, freestanding privacy screens, and tables or desks on casters allow spaces to expand and contract to support distancing and accommodate individuals and groups of all sizes.



Designing a Better Work Experience

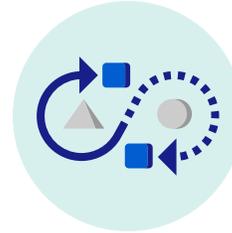
When we consider what people need, and how the work experience is shifting moving forward — old planning paradigms will need to change. Before the pandemic, designers were asked to create spaces that attracted the best talent, supported greater collaboration and maximized efficiency — now they'll need to solve for an even more diverse set of needs.

Steelcase designers have identified a new set of design principles to create safe and compelling environments that will provide a better work experience. A new workplace design approach will include these principles:



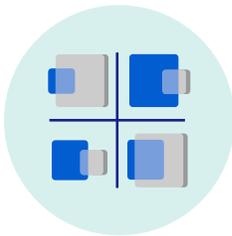
Me + We

The workplace needs to equally support the need for teamwork (“we”) and the needs of individual (“me”) work, recognizing that both modes of work are critical to the creative process.



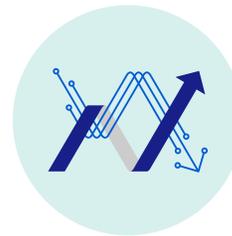
Fixed to Fluid

Offices have historically been built for permanence, with architecture and furnishings that are fixed and difficult to change. To be more resilient, spaces will be designed for greater flexibility and mobility.



Open + Enclosed

People who often did individual work in more dense, open spaces desire more enclosure or shielding to control privacy and safety. Teams who frequently worked in enclosed conference rooms will want more options for open settings both for a sense of safety and flexibility.



Braiding Digital + Physical

Teams will need spaces and technology to create inclusive experiences for remote and physically present team members. Smart, sensing technologies need to be embedded in the infrastructure to support increasingly data-driven and AI-driven experiences.

To learn more about how to create spaces that support a better work experience, visit better.steelcase.com.

Our Commitment

Steelcase is committed to continuing research to understand what's next and share what we're learning to inform new products, solutions and innovations that will help organizations create a better workplace.

We Can Help

Steelcase and our industry-leading dealer network provide in-depth research, expertise, quality products and reliable service that have made us a proven, trusted partner to leading organizations for over 100 years.

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