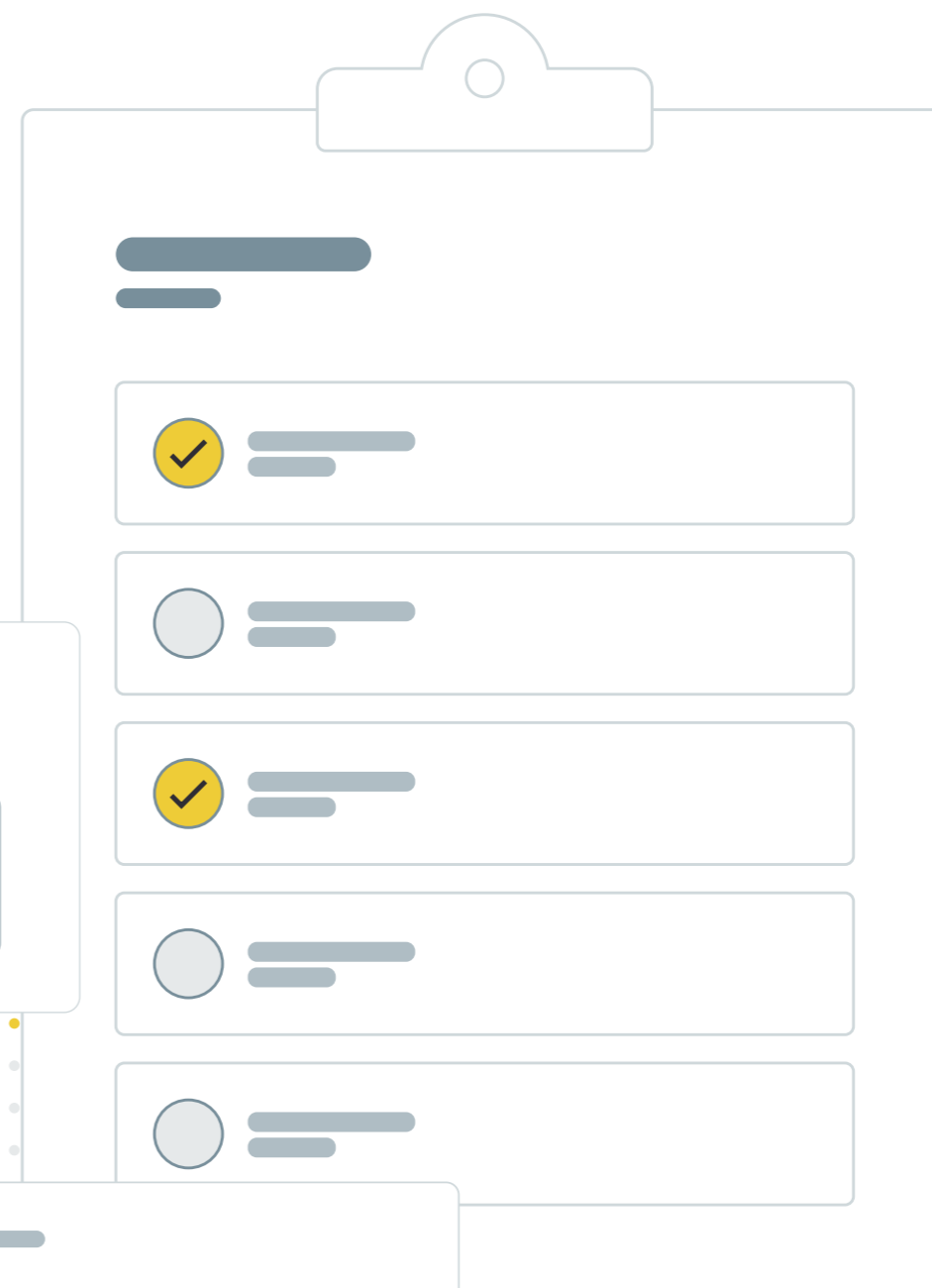
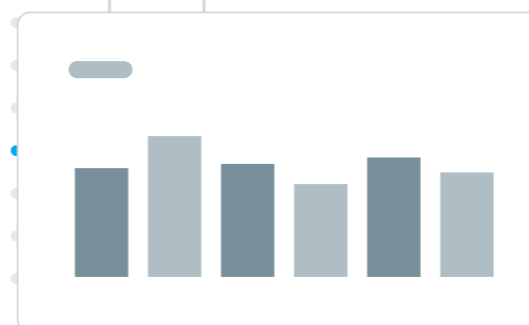
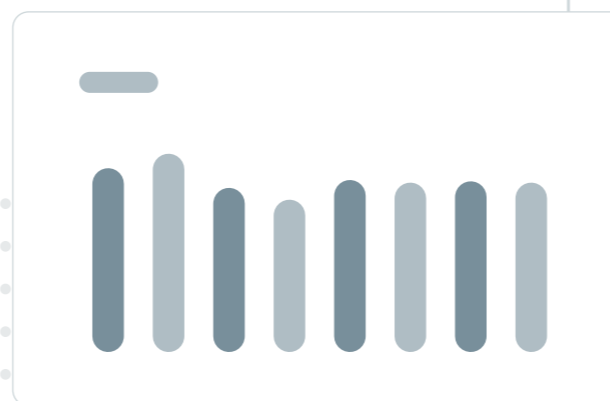
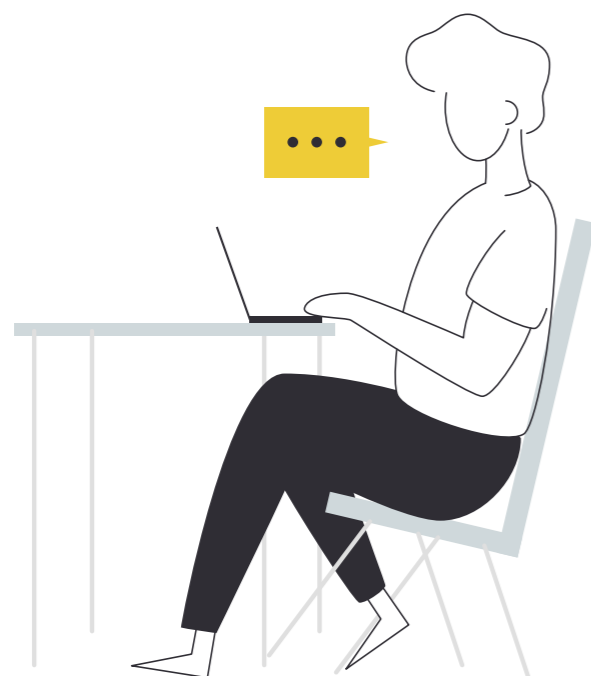


# Return to work survey May 2021

Impacts of the pandemic on the future of work and the implications for businesses



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# Executive summary

We've collated 1067 global responses to understand what impacts the pandemic has had on the future of work and the implications to businesses, in order to help companies navigate the journey to new ways of working.

## How do organisations prepare for new ways of working?

The traditional office setup, with banks of allocated desks and designated hot desking areas are no longer suited to facilitate new ways of working. Empty space represents waste in terms of real estate spending and traditional office set ups cannot facilitate space requirements, identify the need to downsize or expand real estate footprint or enable new safety guidelines introduced as a result of the pandemic.

## The truth is the future of the workplace isn't one size fits all

We know from working with large multinational organisations that there is no simple answer to the future of work. It's a complex and complicated process to work out the right approach for each company. We help large organisations use workplace data, like space occupancy, utilisation, noise and environmental factors such as air quality - to help create healthier, more efficient and effective workspaces.

*What's clear is that there is no one size fits all approach for the optimal workplace setup. Companies need new information and insights to support their office and team.*

**Yodit Stanton**

CEO & Founder of [OpenSensors](#)

# Top findings

- › 4 in 5 already have people back in offices
- › 9 in 10 people want flexible options now
- › 91% cited their company is updating work policies to include remote work as an option
- › 1 in 2 will expand office footprint and 32% of companies will reduce office space
- › 88% expect their office layout to change with more bookable desk and collaboration space
- › 54% expect more collaborative workspaces and 50% want more bookable desks
- › 54% of respondents cite they won't start planning office return plans until Q3 2021 onwards
- › 50% say monitoring indoor air quality will have the greatest impact on employee health and safety
- › 52% of companies are using occupancy and utilisation analytics software to manage office returns
- › 60% are not using seat and room booking systems to manage hybrid working

# The impact of the pandemic on businesses



**86%**

of companies were either fully or partially closed during lockdown 2020 with 11% remaining open.

**34%**

of respondents cited they already had employees back in the office and this has been increasing since Q2 of 2020.



**33%**

say employees will return to offices in Q3 2021 and 20% to return in Q4 2021.

## Space management during lockdown

During the first lockdown, less than 5% of the workforce worked in the office. The impact on businesses was minimal as space was manageable with minimal safety concerns and simple processes in place to manage low numbers in the office

As the months progressed, many people started to struggle with working from home due to:

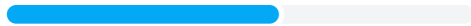
- › Lack of privacy and quiet spaces to do their work
- › Limited access to wifi or technology
- › Mental health affected due to lack of socialising
- › Childcare responsibilities which conflicted with work

As the lockdown eased, people were eager to return to the office. Organisations were able to introduce internal systems with relative ease to coordinate returns. Simple track and trace as well as physical distancing measures were manageable.

# Top challenges encountered working from home

Work-life ballance

**68%**



Poor communication

**67%**



Zoom fatigue

**63%**



Lack of socialisation

**62%**



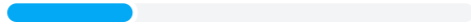
Productivity

**52%**



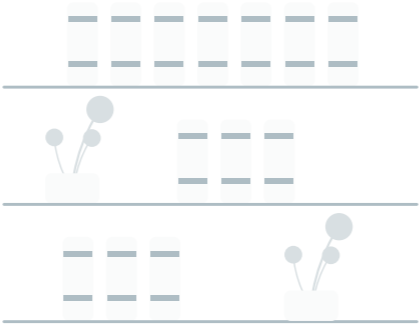
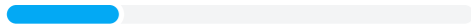
Interruptions

**29%**



No room in house to work

**28%**



## Space management will become more complex with hybrid work models

Businesses are now facing more complex organisational challenges as an increasing number of people return to the office.

This will become even more complex in hybrid work environments to meet space requirements and employee needs.

Precise calculation of workspace operations to allocate space for returning employees in line with health protocols, maintaining physical distancing and scheduling work and sanitation rotations, is needed.

# Planning office returns

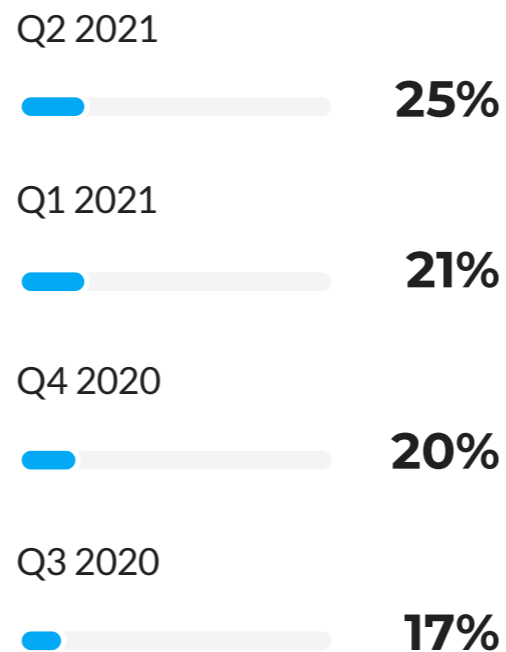
**76%**

say their companies have already started office return plans

**54%**

won't start planning until Q3 2021 onwards.

**When did you start your return to work plans?**



## 88% of employees want flexible working options

Research from the previous lockdowns has shown that employees want to work remotely at least 1 day a week. This is where leveraging data will be critical to understand the impacts that changing work expectations has on the organisations.

## Booking software will aid work rotations

Organisations need to be able to manage who, how and when people are in the office to maintain employee safety. This is now top priority as increasing numbers of employees wanting to return on a rotation basis has led to a higher demand on time.

Booking engines not only ensure that physical distancing protocols are met but enable employees to book rooms or seats in advance, plan their work week and commute into the office.

It provides management a birds eye view of office capacity to manage track and trace processes efficiently.

# Real estate strategies to change in the next 12-18 months

## 1 in 2

expect to increase office space compared to 32% who expects to reduce it

---

## 88%

expect their office layout to change



## Hybrid working will drive real estate footprint strategy

4 in 5 have some people back in offices already and 86% want flexible work options. Hybrid working, social distancing limits and mitigating the risk of a virus spread are some of the drivers for expansion.

While demand for hybrid working is on the rise, companies face a challenging period to meet rising demands for new office setups. Nearly 88% shared that they are changing office layouts.



## How building budgets were spent in the 3 years before the pandemic



**47%**

Adding more collaboration zones



**45%**

Adding more desk space



**23%**

Added better energy efficiency



**35%**

Improving office ventilation

## Budgets will shift with more investment in health & Safety

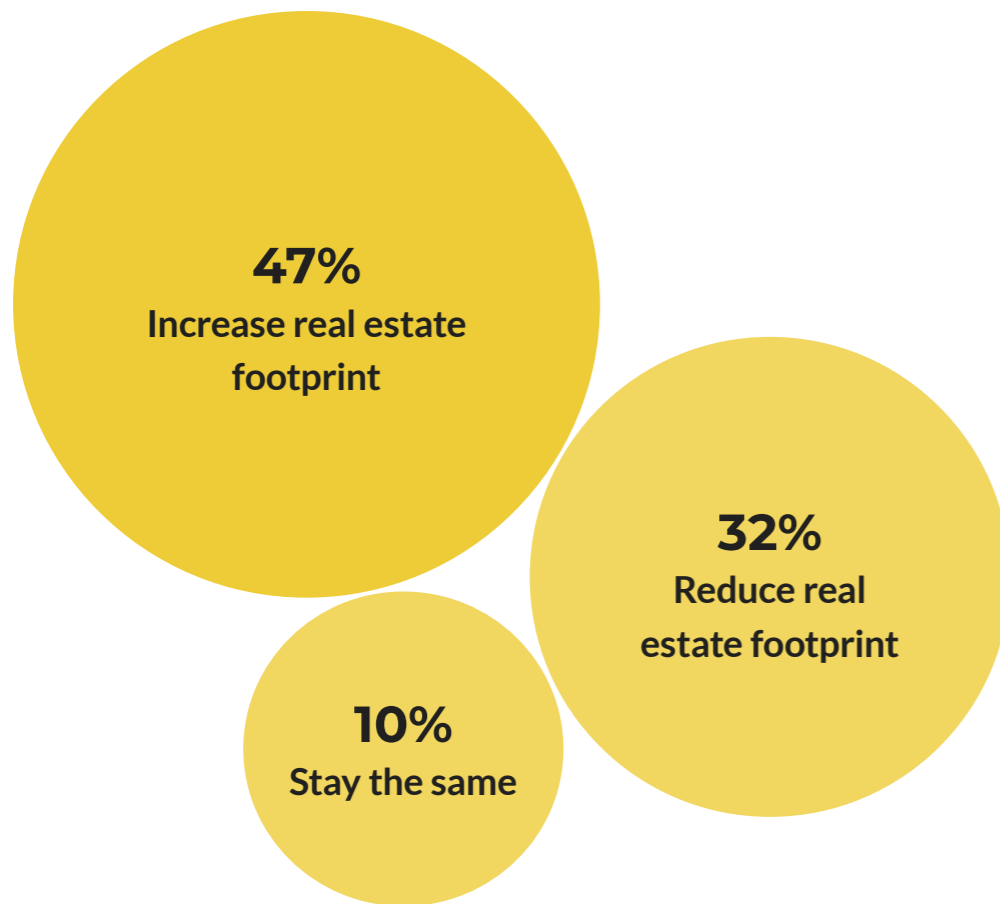
Building budgets were typically spent on office decor with lower investments on environmental efficiencies. This will likely re-balance as organisations re-think real estate strategies, purpose of the office and integrate measures to maintain health and safety.

## Leveraging occupancy software to re-evaluate the purpose of the office

Mobility profiles will change considerably with differing work patterns, rotations and usage of the office as the workplace transitions into hybrid working. Consideration needs to be given to how this will change the dynamic of the office, such as:

- › How much additional semi fixed workspaces are needed for those in the office 2-3 days a week?
- › How much fixed spaces are actually needed for essential workers?
- › How many free desks can be made available for those in the office 1 day a week or fortnight?

## Companies expecting to expand or reduce their real estate portfolio



## Making evidence based decisions to expand or reduce real estate footprint

Integrating [sensor technology](#) to gather floor and desk space occupancy data will provide Leadership teams with a complete picture of utilisation rates across all office space.

Leadership teams can assess whether to downsize or upgrade office space and develop real estate strategies based on the needs of their employees.

In addition they can monitor trends and build up a bank of data to identify patterns of usage as well as forecast space capacity for new headcount.

# Expectations of changes to working and the office space



**86%**

want flexible work options

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**91%**

said their company is moving to do this

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**88%**

expect office layout to change with more bookable desk and collaboration space.

## Hybrid working will become the natural evolution of the workplace

The pandemic has no doubt changed people's expectations and behaviour about work, which has become a driver for workplace changes and real estate strategy.

86% of respondents want flexible work options with 91% citing their organisations are updating work policies to reflect this shift.

The office needs to evolve to meet employee needs. When large numbers of employees return to the office, Facilities and Workplace teams will encounter numerous challenges to manage hybrid working, including:

- › Balancing space capacity and social distancing
- › Managing work rotations and phasing groups of employees return
- › Providing the tools and spaces for employees to work productively
- › Ability to monitor and manage who, how and when people are in the office

## Most expected office changes

More collaborative spaces

**54%**



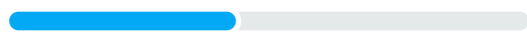
More bookable desks

**50%**



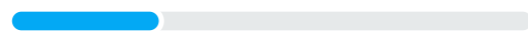
Integrate booking system

**44%**



Fewer assigned seating

**33%**



## Reliance on technology and data will be critical

It's more important than ever before to gather data to provide answers for space requirements and employee needs. In addition, leveraging [space occupancy](#) or [booking software](#) to understand how workspaces will be used as new ways of working emerges, in order to make evidence based decisions.

## Making data driven decisions on cost efficiencies

The growing demand to use data to drive workplace redesign projects has also led to a growing need for Facilities Management and Corporate Real Estate teams to find efficient and cost saving methods to gather utilisation data.

[Occupancy sensors](#) can enable you to get a complete picture of how real estate assets are utilised, including floor, desk and meeting room workspaces. They can be deployed across multiple buildings to gather data in real time.

## Most common complaints before the pandemic

**42%**

are unable to find desk space

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**40%**

don't have enough collaboration spaces for innovation work

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**39%**

have poor room or seat booking management systems in place

## Adjusting the capacity of the office

The most common workplace problems before the pandemic were centred around accessing space, with employees struggling to find workspaces to fit the tasks they were performing.

However, by leveraging space occupancy software, Facilities teams can get an overview of what workspaces may or may not be in use. This information can be used to identify workspaces that could be used as an overflow buffer during peak times, as well as:

- › Spaces with no usage can be allocated as temporary hot desks during peak occupancy
- › Management can compare the utilisation rates of fixed vs. hot desk space and adjust the ratio balance
- › Mobility reports can be used to help influence how to reconfigure workspaces accordingly

# What has the greatest impact on employee's health and safety

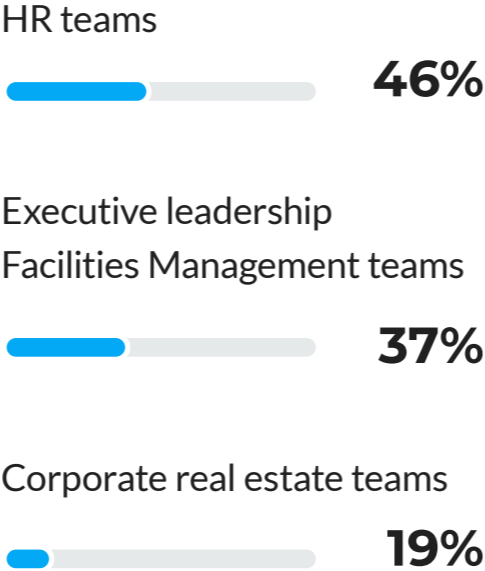
40%

Want to come back on a rotation basis and feel this will have the greatest impact on their health and safety

37%

Would like the option to work from home

## Teams typically responsible for employee office experience



## Managing work rotation in the office

With employees back in the office, desk booking engines can fill in the high level of organisation required to monitor the changing number of employees in the office; and allow Facilities teams to:

- › Easily relay communication on office use between different departments
- › Adjust the capacity of the office space based on a rotation
- › Empower employees to book space in line with their individual requirements and tasks

## Improve employee office experience, expectations and needs

Before the pandemic, a select group was responsible for employee office experience. However, the pandemic has since changed the way we work and expectations of the workplace.

As a result, employee wellbeing has become an ultimate driver that will steer workplace and real estate strategies.



## Leveraging booking software to help employees navigate their time in the office

Booking software will enable employees to see what workspaces are available and auto check in when they are at their seats.

This is especially valuable for employees who commute long distances to the office. Using the insight for busy periods in the office, employees can:

- › Plan ahead for collaborative or focused work in the office more efficiently
- › Book with ease, auto check in, cancel or change their booking with minimal effort

Ultimately giving employees the ability to adapt to new ways of working and office reconfigurations quickly.

# Facilitating employee health & safety in the workplace

**44%**

say their company has integrated flexible work rotations to manage employee safety



**50%**

say monitoring indoor air quality will have the greatest impact on their health and safety in the office



**53%**

say their company has increased cleaning regimes in the office



## Monitoring indoor air quality will have the greatest impact on employee safety

Monitoring indoor air quality is most important to the majority of respondents when it comes to health and safety in the workplace.

Indoor air quality (IAQ) depends on what's going on outside the building as well as what's going on inside. To optimise ventilation and filtration, you need to know what's coming in from outside.

As more people return to the office, measuring the health of office buildings will become critical to ensure IAQ levels do not exceed limits that would increase the likelihood of viruses spreading.



## What companies have done to make it safer to return to the office

Provided PPE

**58%**



Increased cleaning

**53%**



Add air filters and improve HVAC

**47%**



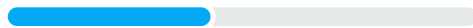
Set up social distancing reminders and barriers

**45%**



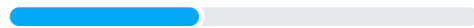
Provide flexible work rotations

**44%**



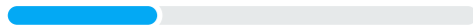
Reduced office occupancy

**40%**



Better employee communications

**30%**



Introduced booking system

**13%**



## Businesses need to do more to maintain employee safety within indoor spaces

Two thirds of those who responded said their company currently monitors temperature levels, with half measuring humidity levels.

However, 60% of those who responded say their company is not monitoring CO2 levels. This is highly concerning as research has indicated a direct link between increased occupancy and CO2 levels can lead to greater transmission of viruses.

Temperature, Humidity, CO2 and ventilation levels have been known to have an impact on comfort and even productivity of occupants of an office building. Add in safety concerns about COVID19 transmission in the workplace and IAQ becomes a factor that businesses need to pay close attention to.

# What environmental conditions do you measure in your offices?

Temperature

**67%**



Humidity

**54%**



Noise

**44%**



Particulate matter

**41%**



Carbon emissions

**39%**



## Gathering air quality data with sensor technology

Gathering environmental data removes any guesswork to ensure buildings are well ventilated and supplied with fresh air.

[Low cost sensors](#) for environmental monitoring can measure CO2 levels to show how well or poorly an area is ventilated. CO2 levels act as a proxy measure for particulate build up and can inform Facilities and Building Management teams on the application of HVAC systems.

## With environmental data you can

- › Ensure air quality levels does not go above limits
- › React quickly to adjust ventilations to allow fresh air to circulate as needed
- › Monitor CO2 limits as offices reach specific capacity
- › Control energy efficiencies in the office

# How businesses are managing space requirements

60%

still rely on manual surveys to manage space requirements



56%

use employee feedback to inform strategies and office changes



44%

have seat or room booking software in place to manage early office returns



## Organisations need an efficient way to gather data on the usage of office space

60% are still relying on one time manual surveys to assess the workplace and its usage. As more employees return to the office, this task will become increasingly time consuming, expensive and complex, especially as organisations move towards a hybrid work environment.

Organisations need to urgently find a way to automate this process.

Only 52% are leveraging [occupancy](#) and utilisation software and 44% have integrated a seat or room [booking software](#) to manage office returns and space requirements.

## Tools companies are using to manage office returns

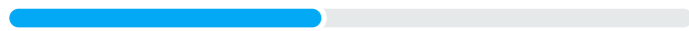
Occupancy and utilisation analytics software

**52%**



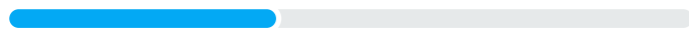
Frequent internal communications

**47%**



Seat and room booking systems

**44%**



## Space occupancy and booking software will be a game changer

The future of the workplace has to support employee requirements and employers will need the right data to adapt the office and new ways of working.

Mapping out the office space that incorporates employee feedback and how space is actually used, can flip employee dissatisfaction, improve their focus, productivity and office experience.

Space occupancy or booking software provides automated utilisation reports that lets management make proactive decisions on space requirements and assess the functionality of workspaces.

This enables Facilities teams to truly understand which assets within the office are most important to employees and adjust the work setting accordingly.

# About OpenSensors

OpenSensors delivers data powered workplace transformation solutions

Our mission is to make sustainability (human, social, economic and environmental improvements) a reality for every workplace in the world. We're a technology company that provides advanced evidence based solutions for workplace optimisation. We believe, in the current global situation with Covid-19, we have the safest and most efficient path back to the office for our customers and their employees. Our technology works seamlessly, behind the scenes, to reveal workplace and workforce patterns and conditions that generate the insight required for confident evidence based decision making.

Our solutions are easy to use, instantly beneficial, and 'just work'. We believe data powered decision making is the foundation for the future of work and a requirement for bringing people back to the office safely with wellbeing in front of mind. We support all stakeholders: Employees, HR, facility management, corporate real estate, IT and finance, by solving the most immediate issues quickly while also providing a strategic core competency for their long-term success. Headquartered in London since 2016 we have a growing footprint across Europe and North America.

*"Now is the start of a new era of the data-driven office to help companies and employees find the right setup and balance".*

**Yodit Stanton**

CEO & Founder of [OpenSensors](#)