THE EVOLVING NORMAL

Building on our New Normal Report, we take a look into the future of the workplace a year on

MoreySmith

THE EVOLVING NORMAL

MoreySmith

Foreword

MoreySmith is a design and architecture studio with RIBA Chartered accreditation. The studio designs environments for people to enjoy from hotels to residential; boutique offices to global corporate Headquarters. Our 'The New Normal' report published in October 2020 was a snapshot of the attitudes, thoughts and behavioural changes post the March 2020 lockdown.

15 months on from our initial report and having gone through multiple lockdowns, we commissioned a nationwide survey of 1,100 people and this, together with the insights from our clients and the day to day running of our projects throughout the pandemic, has provided a current and of the moment picture of attitudes to help us further to gaze into the future of the workplace.

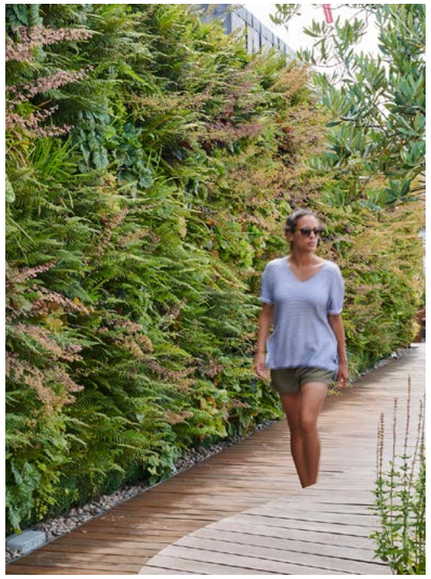
The findings have been used to further research these topics and inform this report, The Evolving Normal.

Trevor Hardy collaborated with MoreySmith as CEO of The Future Laboratory in 2018 to prepare the research paper The Future of The Workplace.

His background in management consulting and digital media, trend forecasting, innovation and changing consumer attitudes were attributes MoreySmith were keen to employ.

Trevor was CEO of What We See, the digital agency, an Active NED, a Fellow of the RSA and an Associate Research Fellow at the British Academy's Future of the Corporation initiative. He is a sought-after public speaker and is widely published on trend forecasting and innovation. He is a co-author of MoreySmith's 2020 report and The Evolving Normal 2021.

Table of Contents



Coca Cola HQ, London

08

Overview + Core Findings

57%

of workers are in favour of a 4 day week

12

The Evolving Normal

The statistics and findings are a blend of the original survey and the poll of 1,100 in 2021

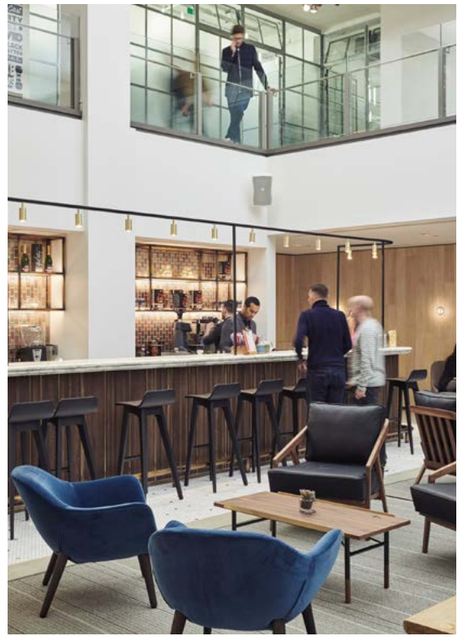
MoreySmith Studio, London

26

Conclusion

61%

of people miss socialising in the office



Sony Music, London

12 Adaptability

13 Productivity is unpredictable

15 Work self / Home self

16 People centric

17 A place for pressure relief

19 The sensing office

20 Unexpected places

23 The slow office movement

23 Place and purpose

24 Source code

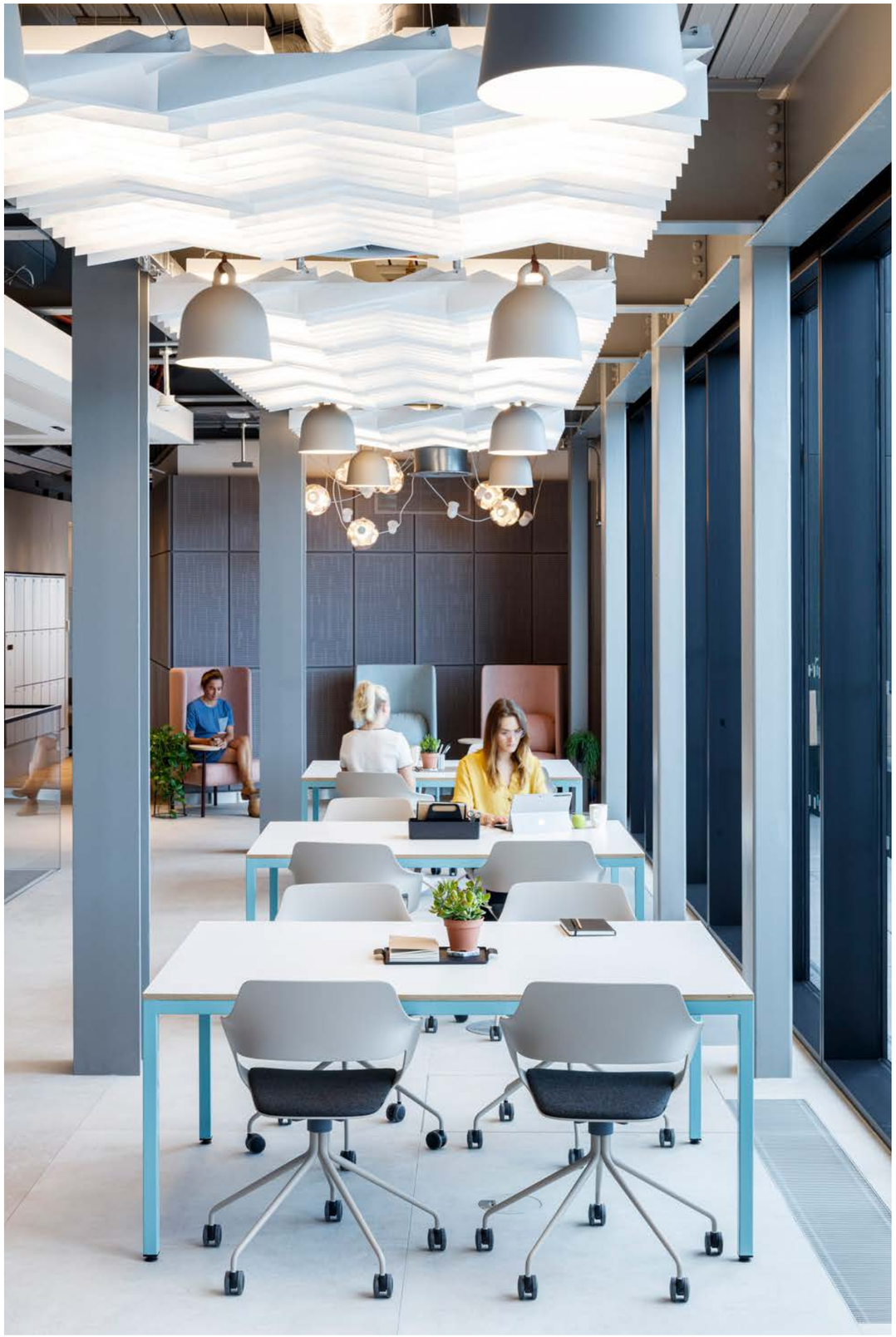
25 Representation in space

OVERVIEW

Stanford economist Paul Romer once said that "a crisis is a terrible thing to waste". To describe the period so far defined by the COVID-19 pandemic a crisis – in health, financial or emotional terms – would be an understatement. An optimist would insist that out of chaos will come order and with that spirit, this report aims to look ahead to the emerging and evolving nature of work and workplaces. It is this concept of evolution that we believe will be the prominent theme as talk of an eventual 'new normal' seems far less likely than years of continuous, and often, unpredictable change.

This evolving normal will also be characterised by a need to embrace velocity of change. Amongst the many new realities ushered in by a global pandemic is how quickly things have been transformed; changes to behaviours and design that may have otherwise taken a decade to materialise, have now become a new normal in less than two years. We threw around terms such as 'the paperless office' and 'teleworking', always imagining in some distant, ambiguous future. Before Covid-19 came into our lives many talked about the benefits of flexible working and working from home. We imagined a future where that would be the norm, not expecting it to happen so quickly.

The concept of the workplace of the future remained just that – a concept – for so many years because we assumed that the transition to a dramatically different environment would prove disruptive to people and productivity. Looking back, we should not have been resistant to substantial change. The vast majority of our respondents had not worked remotely in any extended period of time and, despite this, the majority also said they adapted quickly to new working dynamics. It is with the benefit of some hindsight that we believe the essential workplace quality required to thrive in the years ahead will be adaptability; the ability to adapt quickly and persevere in the face of unexpected and continuous change.



The Post Building, London

CORE FINDINGS

Our poll allowed us to actively understand developing attitudes, concerns and challenges of returning to the workplace and the future of the office itself.

The statistics and figures in this report refer to our findings from this poll and allow us to envisage the workplace in the years to come.

Coca Cola HQ, London

The office is an essential hub away from home distractions and offers a distinction in home and working life

61%

of people miss socialising and half of workers want social spaces to return to the office. 57% of workers miss collaborating in the office

Deskopolitan Chateau d'Eau, Paris

Pandemic bike boom. Wellbeing has become a prominent factor in daily lives which employers should make a conscious effort to support

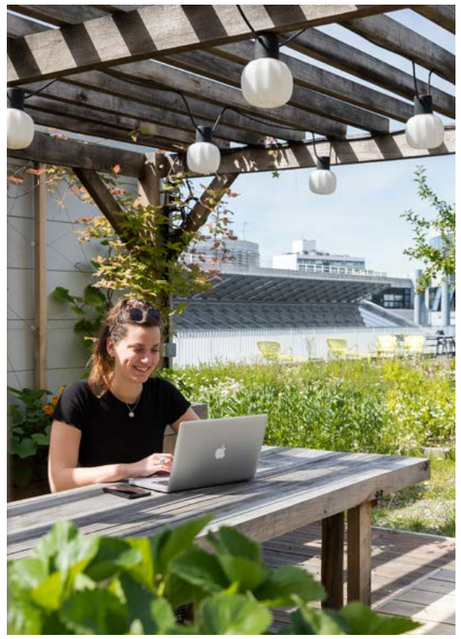
35%

of people want better bike storage and showers to help return to work

People are pursuing autonomy and a more valuable balance between their working, social and personal lives

58%

of people would like a work place that offers agile work options and being able to work from home at least part of the week



Deskopolitan Voltaire, Paris

Coca-Cola HQ, London

Adaptability

Scenario planning or 5- to 10-year horizons were usually left for business planning exercises, but now it must be something that employees and teams consider. Contingency planning and 'what if' scenarios to anticipate unforeseen events will help businesses be more agile to cope with the world's increasing uncertainty.

58%

of people believe agile work options will be important when going back to the office

MoreySmith Studio, London

73%

of people believe the level of trust in employees has increased

Productivity is unpredictable

There is an entire industry and a correspondingly immense body of research into how to increase workplace productivity. The amount of time and resources spent designing offices for optimal productivity was thrown into disarray this year, as homes were certainly not designed to be productivity-boosting environments. But, rather surprisingly, people quickly found places, tools and time to be as or more productive than they were in the office. As we look forward to the workplace of tomorrow, productivity will not be a one-size-fits-all solution. Productivity will be unpredictable and progressive office spaces will allow their employees to configure spaces and resources to their most productive self, rather than imposing rules for effective working styles.

Centre Point Apartment, London

57%

of people would like to move to a 4 day week

66% want flexible hours

Work self / Home self

Working remotely has provided the unfortunate benefit of understanding the consequences of removing virtually all social interaction between employees. Companies should take the time to assess the impact on morale, culture, productivity, and quality of work. This insight will provide invaluable guidance on how the office can be re-engineered to foster the positive personal interactions that cannot happen with a remote working situation.

Private Residence, Clerkenwell

Deskopolitan Chateau d'Eau, Paris

When we look back, this period will have also ended the debate about whether you can separate your work self from your home self. And as office life returns to its next-normal, people should be encouraged to bring their whole self to work; with spaces that accommodate this duality to get the best out of their people. This will require changes in design and corresponding changes in management: moving from performance driven environments to empathy driven environments. With the key questions for managers moving from ‘what have you done?’ to ‘how do you feel?’

43% of people said access to mental health facilities going forward was very important or fundamental

Dunhill HQ, London

People centric

In examining the reasons why people want to come back to the office, there is significant disparity in age group, lifestage, family composition and economic circumstances. One thing is clear: there is no single office design that suits everyone. Offices serve different purposes and the design satisfies different needs for different people at different times in the week.

For some, the office is an escape from the isolation of home, to a social space. For others, a quiet place of escape. Some come to put heads down and work. Others come for learning. Some find the office pressure-filled, others a place of wellbeing. The opportunity for future space design will be to cater to emerging needs, rather than employer or departmental goals: creating spaces for social interaction, recognition, learning, wellbeing, quiet or creative stimulation.

Primark International HQ, Dublin

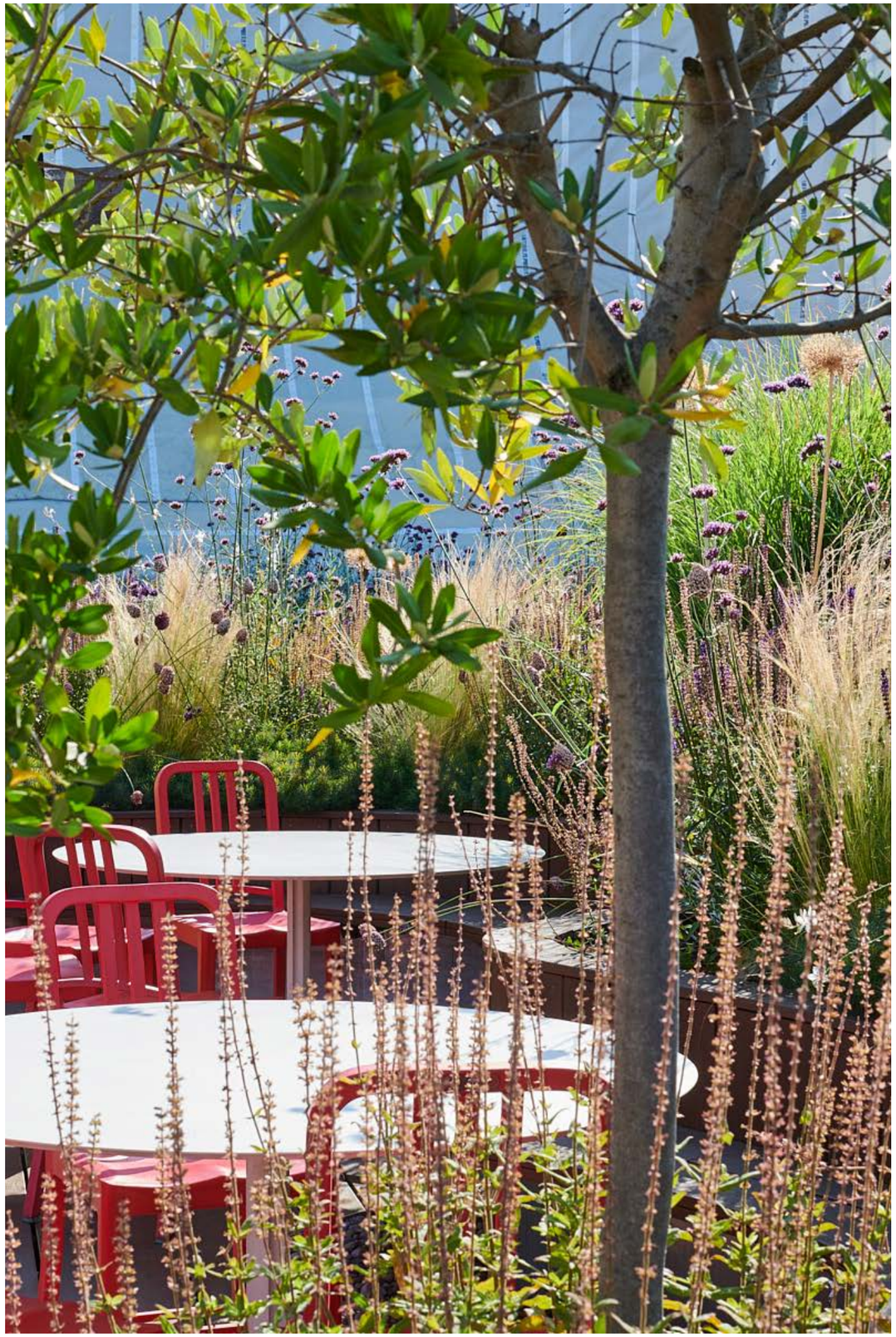
A place for pressure relief

The mental health consequences for adults and children because of health, economic and social unrest events of 2020 will be felt for years to come. It goes without saying that individuals and employers will need to take care of each other as we look ahead to the next workplace. It may also bring an end, or at least a balancing to an era of striving and optimising performance.

The unrelenting growth mindset has been an aspiration for companies and workers. We are behaving as if we have infinite physical energy and material resources. There will be a movement to anti-striving. Creating space and time for play, decompression; not always having to be optimising, learning and growing. The enhanced workplace of tomorrow will also provide space and time to relieve the pressure.

" The desire for us to come together will be ever stronger... the excitement of collaborating and holding on to a sense of belonging and community spirit "

Linda Morey-Burrows,
Principal Director, MoreySmith



Coca-Cola HQ, London

65%

agreed meetings will continue to rely on digital platforms

The Post Building, London

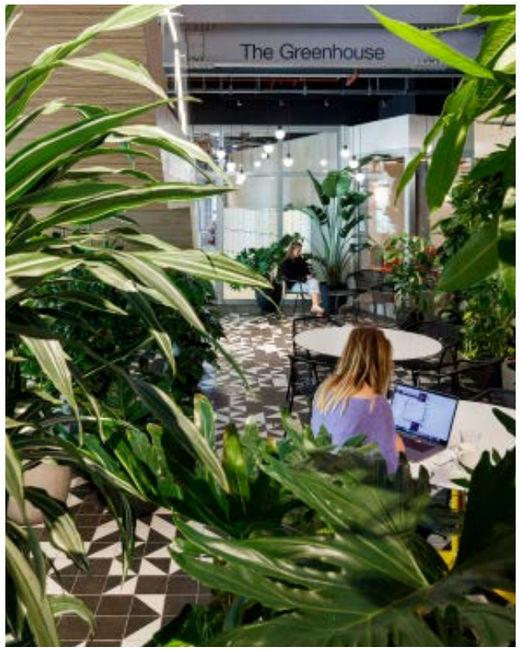
The sensing office

In addition to a range of safety and hygiene measures, the survey points to innovation to ensure the health and peace of mind of employees, including doors that sense your approach and open without handling. These could be the first stage of an office environment that behaves more like a wearable device. If we examine the popular uses of wearables today, we may anticipate the features that an office can provide tomorrow. Your desk will know that you have been sitting for too long, and could suggest movement to boost energy. Your personal profile suggests your best thinking time is in the morning but ceiling sensors detect a low-point so it creates a lighting and sound environment to release dopamine. Your blood sugar is low, and food arrives to correct it. Your activity suggests that you are in need of social interaction, the office organises a gathering with people feeling the same way.

Unexpected spaces

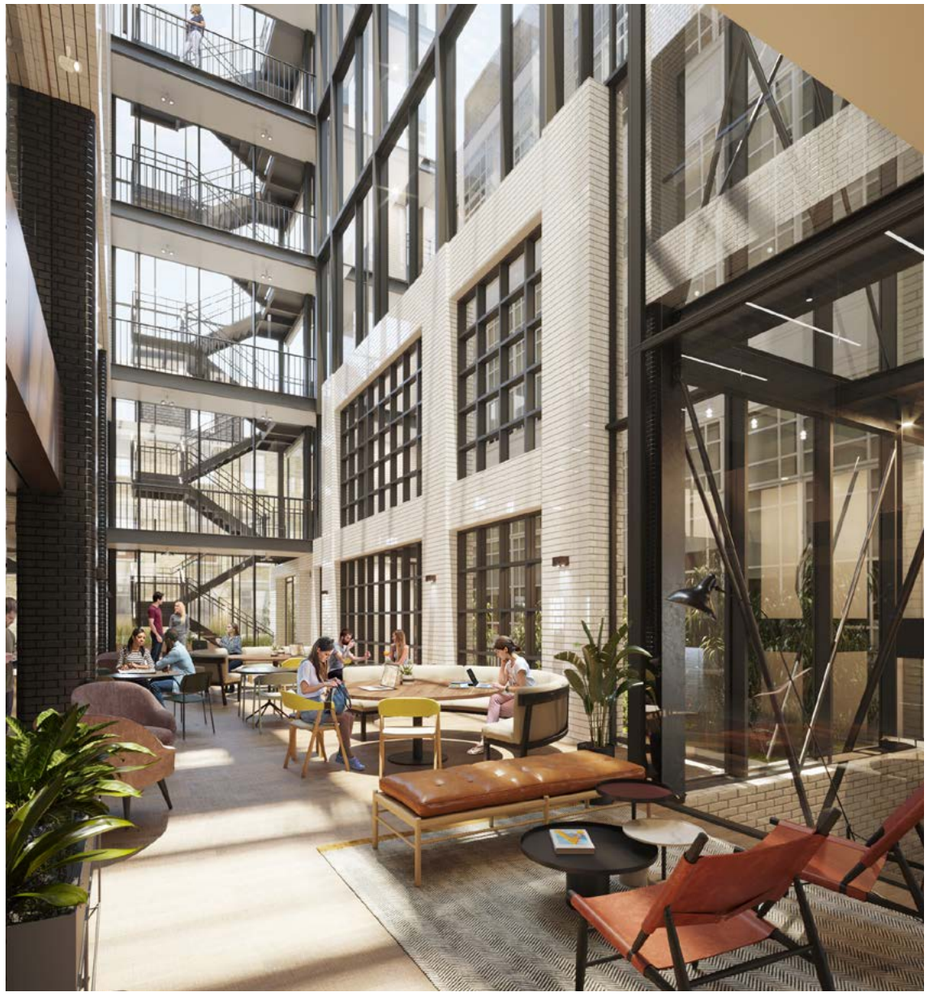
Working remotely may be delivering some productivity benefits that are partly due to the ability to work longer hours from time saved not commuting. Increased productivity is also the result of decreased, unexpected interruptions. There are certainly positives in this dynamic, but the absence of spontaneous conversations and ideas can have adverse long-term consequences on creativity, innovation and company culture. As we look forward to the optimal work environments, a blend of office-based and flexible working, it will be essential for companies to make room for serendipity; to provide space and time for the unexpected, chance interactions and moments that are designed to wake the imagination. Thriving companies will find ways to assess the health of the company by measuring productivity as well as measuring creativity.

MoreySmith studio, London



The Post Building, London

Workplaces will shift towards a hybrid working model, supported by state of the art technology. Quiet areas for private calls and conversations as well as focused working will be essential for 46% upon returning to the workplace.



CBRE UK HQ, London (MoreySmith CGI Image)

" It will be essential for companies to make room for serendipity "

Trevor Hardy
CEO of What We See

Dunhill HQ, London

76%

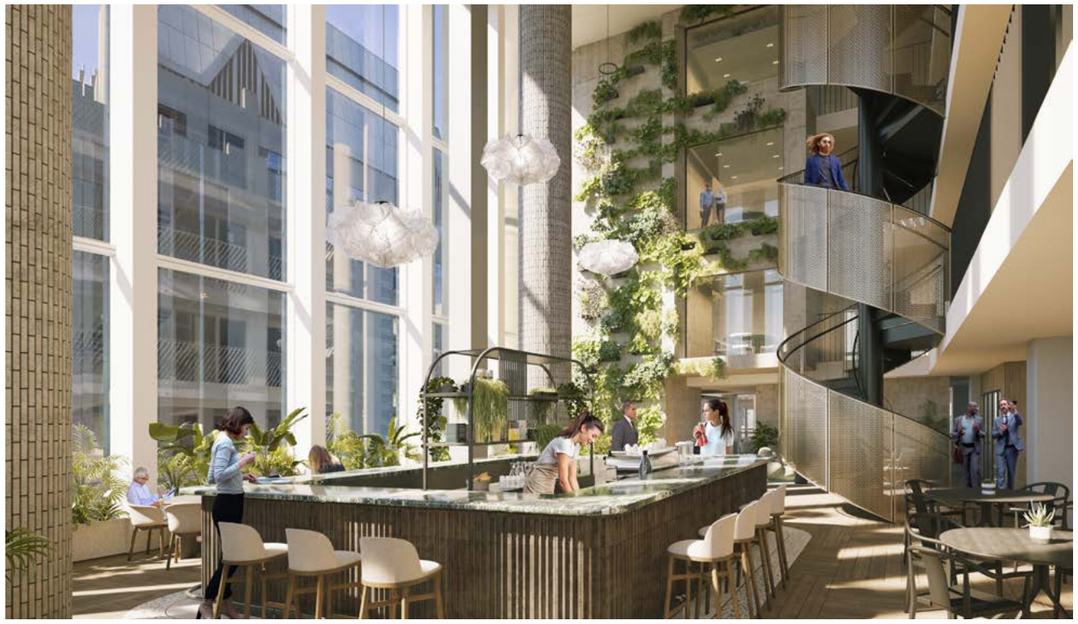
of people notice a loss of company culture and interaction when working from home

The slow office movement

We may be closing the curtain on an era where businesses aspired to speed, to growth at almost any cost and short-term view on their impacts on people and the planet. As more conscious capitalism gains ground in boardrooms, an emerging philosophy will translate into a more mindful office environment. The office of today was designed to embody the best of the urban experience. As people crave more safety, security and serenity, a rural design may become more desirable. One that embraces nature, balance, community and slowness – taking time to do the right things for people and the planet. We may find that the HQ, a single central office that many commute into will be a relic of a less thoughtful past, in favour of many healthy, hyper-local outposts.

Place and purpose

A company's purpose to deliver shareholder returns is a dynamic of the past. Large and small companies are now equally focused on serving their customers, their people, communities, the planet, and shareholders. This newfound purpose is driving significant changes in company behaviour, including ethical and sustainable practices – all that enhance performance, not at the expense of it. There is growing evidence that a values-driven company performs better in financial and more human measures. We should expect office environments to follow the same trajectory: from spaces designed to improve a company's productivity, to spaces designed to enhance a company's purpose. The period ahead will bring the workplace strategy directly in line with the corporate strategy; and the office becomes the embodiment of the company's future direction, not an edifice of where it is today.



The Manhattan Centre, Brussels

Source code

We all know that we are what we eat. Over the last decade this belief has translated into all aspects of our lives as provenance drives an increasing number of consumption choices. People are increasingly concerned about where a product is made, who makes it and what it is made from; with growing interest in sustainable, recycled and ethical products.

This behaviour is set to extend beyond the personal and home life to the workplace. Offices that are innovative, well-designed and decorated will become less important than spaces that are thoughtfully sourced, with compelling stories about the materials, craftspeople and companies that create the stuff that surrounds us.

51% of people believe sustainable and conscious design will be more prominent going forward

" It's clear people still want to come to a workplace forum, for creative collaboration, social connection, exemplary facilities and escape from domestic frustrations. However, to attract the new culture of entitlement and the rumble of revolution demanding changes to how and where we work, the office needs to be much better than before "

Linda Morey-Burrows,
Principal Director, MoreySmith

Representation in space

To match the efforts that many companies are taking to offset carbon and waste, there should be corresponding initiatives to offset unconscious bias in workplace design. Amongst the many cultural shifts that 2020 will bring, is a greater appreciation for negative effects of unconscious bias to issues of disability, race, age, gender and sexuality. As uncomfortable as they may be at first, companies should push for healthy debates and open conversations about how spaces are designed, who they are designed for and who they are designed by. Exclusion of some people may not be intentional, but actively including more diversity in office design will lead to greater inclusivity, thriving workforce and a more successful company.

Sony Music, London

CONCLUSION

A time of transition and evolution...

The results of the MoreySmith survey point to workers and workplaces in transition. A realisation that we have left the workplace of yesterday behind but are not yet clear on what the workplace of tomorrow will be.

Navigating such in-between times can be unsettling. However, embracing the reality that we are not heading towards a final, normal destination but rather on a journey of continuous change will fuel innovation. Insight from our research illuminates a number of areas for fresh thinking on what an office can be. This is not the time to long for what was, but instead to imagine what will be. As our research shows, there is no single answer, no formula for success. This report provides many starting points.

How can office design be reimagined to fuel serendipitous moments and provide sanctuaries from stress?

As companies strive to be more mindful, ethical and sustainable, how can spaces lead this movement?

No conclusion, but the beginning of a continuously evolving conversation.

"Covid has given us the opportunity to change the way we work and get more balance back"

Anonymous survey response

Deskopolitan Chateau d'Eau, Paris

MoreySmith Studio, London

BIBLIOGRAPHY

Photography Credits:

Cover
Frédéric Baron-Morin, Deskopolitan, Chateau d'Eau, Paris

Page 4 & 5
Martin Di Stasi, CGI, MoreySmith Studio

Page 6 & 7
Jamie McGregor-Smith, Coca-Cola HQ, London
Jamie McGregor-Smith, Sony Music, London
Shaun Cox, MoreySmith studio, London

Page 9
Philip Durrant, McKinsey & Company, The Post Building, London

Page 10 & 11
Brown Brogue, Coca-Cola HQ, London
Frédéric Baron-Morin, Deskopolitan, Chateau d'Eau, Paris
JFrédéric Baron-Morin, Deskopolitan, Voltaire

Page 12 & 13
Brown Brogue, Coca-Cola HQ, London
Shaun Cox, MoreySmith studio, London

Page 14 & 15
Philip Durrant, Centre Point Apartment, London & Private Residence, Clerkenwell
Frédéric Baron-Morin, Deskopolitan, Chateau d'Eau, Paris

Page 16 & 17
Philip Durrant, Dunhill HQ, London
Donal Murphy, Primark International HQ, Dublin

Page 18 & 19
Brown Brogue, Coca-Cola HQ, London
Philip Durrant, McKinsey & Company, The Post Building, London

Page 20 & 21
Philip Durrant, McKinsey & Company, The Post Building, London
Fiona Smallshaw, MoreySmith studio, London

Page 22
Philip Durrant, Dunhill HQ London

Page 24 & 25
Martin Di Stasi, CGI, MoreySmith Studio

Page 27
Frédéric Baron-Morin, Deskopolitan, Chateau d'Eau, Paris

Page 28
Fiona Smallshaw, MoreySmith studio, London

Page 30
Shaun Cox, MoreySmith studio, London

Additional:

Wired magazine, The Global Remote Working Experiment, August 2020

The Way to Work - The Human Technology Interface, Monocle 24 Radio, August 2020

Back to Work, Monocle 24 Radio, May 2020

Polling research undertaken by Yonder, commissioned by MoreySmith

MoreySmith Studio, London

MoreySmith

24 Marshalsea Road, London, SE1 1HF
info@morey.co.uk
+44 (0)20 7089 1470
www.moreysmith.com