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WORLDWIDE OFFICE TRENDS
**WHY THE WORLD OF WORK
WILL BE DIFFERENT BUT BETTER
FOLLOWING THE PANDEMIC**

WHITE PAPER

ENJOY SEATING PERFORMANCE.





THE POST-CORONAVIRUS OFFICE WORLD WILL BE BETTER THAN BEFORE

After the crisis, we will recover – and do so in a working environment that is better than ever before. But what exactly does that mean? Where will the journey take us and how will our working environment look in the future? It is clear that the essential features of social distancing will remain, and consequently shape both the place of work and working environment. The boundaries between work and private life will increasingly disappear. People will work more flexibly and spend more time at home with the family, meaning that work itself will become more intense. All in all, the whole working world is turning into more of a hybrid model, and a new balance between personal interaction and virtual collaboration is just emerging. And digitalisation is also at a whole new level. Many companies have been forced to make advances in this field within a very short time. In doing so, they have taken many steps towards a more digital way of working and working environment, from which we will benefit in the long term.



FLEXIBILITY FOR WORKING IS REACHING NEW LEVELS

Rigid structures, a daily journey to the office, starting at eight and finishing at five belong to the past. Working from home, flexible working hours to fit around childcare and family obligations, changing workplaces and video conferences from the most diverse places – this is what a normal day at work currently looks like. Driven by coronavirus, employers worldwide are grappling with the issues of flexible and mobile working, new communication technologies and working from home. According to the Fraunhofer Institute¹, 60% claim that they are significantly more flexible in terms of where and when they work than before the pandemic. Most of us are currently guinea pigs in a large-scale test scenario of "flexible working", even though it was not planned. We are all experiencing the good and bad sides and the challenges of this way of working, and are thereby creating the basis for a new flexibility in the working world of tomorrow.

¹ "Coronavirus home office survey" by the Fraunhofer Institute for Industrial Engineering IAO, Stuttgart, May 2020



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EMPLOYEES TAKING PERSONAL RESPONSIBILITY IS BECOMING MORE IMPORTANT

A further aspect that flexible working and working from home entail is greater personal responsibility and independence on the part of employees. Agile working is expected and encouraged; employees are more trusted but more is also demanded of them. They must work on their own initiative and plan their work day independently. The additional trust shown by employers involves recording working hours independently, greater freedoms and the departure from an attendance culture and hierarchical management styles. This new freedom is not for everyone. However, studies prove that for most people this cultural switch leads to greater motivation and performance. Now it is up to employers and employees to see this current more flexible way of working as an opportunity and to make use of the extensive potential that these new freedoms have.



MANAGEMENT IS BEING REINVENTED

It is all about letting go of the reins. Less control, more leeway, more trust. What had to be done, due to the pandemic, at the drop of a hat gave the go-ahead for a new management and work culture and a more cooperative management style. Everyone is on an equal footing, and employees work independently and responsibly on their tasks without constant supervision. Physically distanced working makes clear aims, accessibility and a proactive and sensitive "presence" important for employees. But how can the employer fulfil their duty of care here? What can the boss do if their employees feel isolated when working from home? These questions must also be answered so that a successful model for the future can be developed from this positive trend.



PHYSICAL DISTANCES ARE BEING DEALT WITH DIFFERENTLY

For important meetings, people used to go on long journeys and trips abroad. That practice is now being reassessed. Due to contact restrictions and travel bans, it was necessary to find alternatives within a very short time. And these were mostly digital. Video conferences are currently on the agenda, and providers of video conferencing tools are experiencing a boom. Actual meetings are currently being replaced by digital meetings. Data traffic at the Frankfurt Internet exchange point has increased by 50% due to video conferences². In an unscheduled self-experiment, we have experienced that you can also discuss issues, make decisions and advance projects without sharing the same physical space. In future, physical distances will no longer present obstacles. The number of business trips will decrease in the long term, saving us time, money and CO₂ emissions.

² Press release from the DE-CIX Internet exchange point operator, March 2020



VOICE COMMAND IS BECOMING THE NEW TOUCH

In the times of a pandemic, "don't touch" is key. Practical touch control is currently appearing in a whole new light. At the moment, we don't feel very comfortable with touching. Particularly when it comes to more frequently used devices and places. This is why another topic is now continuing to come to the fore – voice command. Already an important topic for a huge variety of devices in any case, the technology is also becoming usable in buildings themselves. For doors, taps and lifts, voice command will replace manual operation in the medium term, and consequently start to supersede operability.



MATERIALS AND SURFACES ARE BECOMING EVEN MORE IMPORTANT

Due to coronavirus and the resulting COVID-19 respiratory disease, hygiene measures and disinfection are now front and centre. Even if surfaces have been proven not to be the main carrier of the virus, it is nevertheless important to further minimise the risk of transmission in this way. But in addition to cleaning and disinfection, it is also the selection of materials and surfaces themselves that is significant here. Visual and sometimes tactile reasons are generally what drive selection in the office environment. Now, washing, antibacterial and virucidal properties are coming to the forefront. Small-pore, hard surfaces that are easy to clean are becoming more relevant. More detailed information about cleaning and disinfecting office chairs and furniture is available in the white paper "Hygiene measures in the time of COVID-19". New developments, such as nanotechnology and blue light, are quickly progressing and are being integrated into products to stop bacteria and viruses. What is good for the inter-personal domain is also good for materials – less superficiality and more of a view to inner qualities and properties.



GREATER AWARENESS OF HUMANITY AND NATURE

Fresh air, walking through forests and across meadows, looking at natural landscapes – all this keeps you healthy. Plants and trees clean the surrounding air. Productivity, concentration and creativity increase by 15% in natural surroundings³. And this health awareness is being further increased by the pandemic. Clean air and health have gained a completely new significance over the course of coronavirus. Offices are accordingly "welcoming nature".

³ Study by the University of Exeter, 2014



CUBICLE OFFICES ARE EXPERIENCING A REVIVAL

In future, there will no longer be such open-plan offices as can often be found today – with many people working in large open spaces. The open-office trend is being reversed. Which doesn't mean that there will be no more open offices. But separate work areas that ensure (hygienic) privacy are suddenly "in" again – and not to the annoyance of employees, but to their delight. An increased demand for flexible, mobile and modular solutions for the remaining office spaces is developing in parallel.



DISTANCING REQUIRES SPACE

One thing clearly stands out. There will be fewer workspaces in a greater area in the long term, to maintain distances between people and consequently reduce the risk of infections. The remaining spaces are shaped by elements designed for flexible use and touchdown workspaces. You can also feel a change in every one of us – quite apart from the actual risks of transmitting diseases. Where previously a firm handshake and an embrace were natural and common signs of respect and sympathy, something else is now emerging. We feel more comfortable at a distance. What this means in practice is more space, more air, wider hallways and flexible usage possibilities. The times of maximum spatial efficiency to the disadvantage of the users are gone.



DESK-SHARING REMAINS RELEVANT

Having fewer workspaces in a larger area also requires desk-sharing. When switching between working from home and working in the office, fixed workspaces are already a thing of the past. The new hybrid working world with its generous office spaces and smaller number of seats requires workspaces that can be used quickly and flexibly by different people. What is also important here is keeping surfaces and furniture used by different people clean, and effectively sanitising and disinfecting them. More detailed information about cleaning and disinfecting office chairs and furniture is available in the white paper "Hygiene measures in the time of COVID-19".



CENTRAL ZONES AND "CREATIVE SPACES" ARE BECOMING EVEN MORE IMPORTANT

The reason being that many people are working from home – and they are happy to do that – so the reduced time spent in the office is becoming all the more important. The forsa polling institute found out, on behalf of the Interior Business Association (IBA), that 40% of respondents miss collaborative team and project work when working from home⁴. Where else can you get motivation and feedback, and draw positive energy from a team? This is precisely where we should begin. Office design needs to encourage communication, interaction and creative exchange between colleagues, and efficient teamwork. More than ever, a pleasant atmosphere has to be created – one that simultaneously encourages concentration and creativity. This in turn increases the relevance of dividing the space into a wide variety of work zones. Flexible collaboration areas in central zones and meeting points are especially what is needed here. So these "creative spaces" will be designed differently from the way they were before coronavirus – more generous, more airy and with more space. And this space is available because permanent areas are decreasing. Hybrid rooms with extensive technical equipment are emerging, which also allow a mix of on-site and digital presence.

⁴ forsa survey on returning to office workplaces, April 2020



WORKING FROM HOME: FACTS AND FIGURES

30%

want to work mainly from home.
US Work From Home Survey 2020, Gensler architectural office

35%

of the working population had worked from home before the coronavirus crisis.
Survey by the Bavarian Research Institute for Digital Transformation, March 2020

49%

of the working population are currently working from home.
Bitkom survey, March 2020

13%

greater productivity from the working population when working from home rather than in the office.
Stanford University, 2017

70%

want to work mainly in the office.
US Work From Home Survey 2020, Gensler architectural office

68%

of the working population want to work from home more after the crisis.
Survey by the Bavarian Research Institute for Digital Transformation, March 2020

67%

of the working population feel good about working from home.
Fraunhofer "Coronavirus home office survey" 2020

30%

of the working population find it easier to be more creative in the office.
Fraunhofer "Coronavirus home office survey" 2020



THE KITCHEN TABLE IS NOT A PERMANENT SOLUTION

Due to the relocation of work from offices to homes that happened at extremely short notice for many people, some of the new homeworkers are still not sufficiently equipped at all. According to a current study by TH Köln University of Applied Sciences, more than a quarter of respondents perceive their furnishings at home to be completely insufficient for working⁵. Multi-locational working at the kitchen table, in living rooms and in kids' rooms works, but does not replace an extensively and ergonomically equipped workspace in your own home. According to a study by the Fraunhofer Institute, less than half of respondents have a separate office at home⁶. Consequently, the importance of flexible solutions, like partitioning elements and versatile desk chairs and tables that fit the interior, is also increasing. The Gensler architectural office, on the other hand, is imagining a scenario in which completely separate work areas will be planned in private flat and housing concepts in future, to separate work and private life within your own four walls. One way or another, the demand for varied, customisable solutions will increase due to the increase in people working from home.

⁵ Ad hoc study by TH Köln, Cologne, 18th April 2020

⁶ "Coronavirus home office survey" by the Fraunhofer Institute for Industrial Engineering IAO, Stuttgart, May 2020



GREATER PRODUCTIVITY THROUGH DEEP WORK WHEN WORKING FROM HOME

According to the Fraunhofer Institute⁷ and a Haufe study⁸, about 60% of employees say that they can concentrate better at home and are also more creative. And this intense and creative thinking without interruption is very satisfying for employees – and simultaneously productive for employers. According to research by Stanford University, working from home leads to a performance increase of 13%. The reasons for this are clear – fewer disruptive factors such as colleagues and telephones, and less noise. Of course there is also the threat of distraction at home, but you can control and reduce this better than in the office. But this focus can also be dangerous. Breaks are not taken, regular movement declines, and the work day ends later and later. To counteract this, awareness and self-discipline ensure more intensive working time when working from home.

⁷ "Coronavirus home office survey" by the Fraunhofer Institute for Industrial Engineering IAO, Stuttgart, May 2020

⁸ Haufe 2020 study, "Healthy working from home"

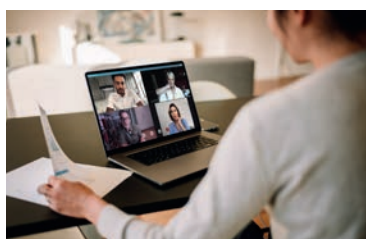


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THE ANSWER IS THE RIGHT COMBINATION OF WORKING FROM HOME AND AT THE OFFICE.

Studies indicate that people want to work in the office for the most part. Others reveal that most people feel very comfortable with working from home. What seems like a contradiction at first glance is not actually all that contradictory when you look more closely. When working from home, you can work on tasks with greater concentration and you save yourself the commute to work – which, according to a study, already saves 4.5 billion kilometres of commuter journeys in Germany if just 10% of the working population who normally travel by car work from home once a week⁹. In the office, on the other hand, you cultivate increased social contact, and work creatively in a team and face-to-face. These factors are essential for motivating employees and achieving good work results. Hybrid working is consequently the right choice.

⁹ Report by the Institute of Applied Ergonomics, 2019



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SUMMARY

Not all developments in the working world have been significantly influenced by the coronavirus pandemic. But coronavirus has radically accelerated many trends and changes. We cannot currently predict when the economy will recover from the crisis. But we can see the current situation as a chance to change things and to make advances. By doing so, we can create the basis for a flexible and highly productive working environment capable of quickly generating an upturn. The hybrid working world after coronavirus will be shaped by significantly more working from home, increased flexibility in the use of space and the increased use of digital means of communication. As a result, comprehensive solutions for the customised furnishing of professional and ergonomic home offices will be very much in demand. There will also be an increasing demand for flexible, mobile and modular products for the reduced office spaces.