

A close-up photograph of a woman's face and hands. She is smiling broadly, showing her teeth. Her hands are holding a dark-colored smartphone. She is wearing a light blue denim shirt. The background is blurred.

SONY

A survey by Sony Network Communications Europe

The changing role of the office, post-COVID

Has the pandemic changed our concept of 'the office' for ever?

Before COVID-19, nobody could have guessed how much our working lives would change in just a few short months. For those of us who were lucky enough to be able to continue doing our jobs from home, this was a period of adaptation – for better or worse, depending on your perspective. Now the vaccine is gradually being rolled out and there's light at the end of the tunnel, what better time to explore the impact of the pandemic on employees' attitudes to office life, and to consider how these might affect the way we think about *and use* the office in the future?

Topics explored in the survey

1.

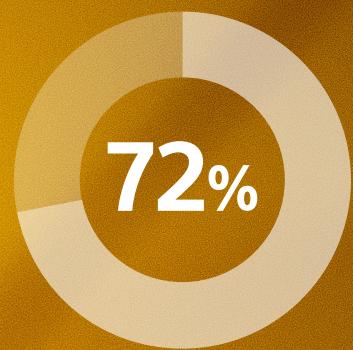
The pros and cons of working from home. Will the office still have a part to play in the post-lockdown world and if so, what will its new role be?

2.

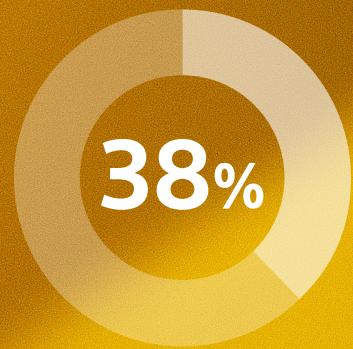
How do people feel about the prospect of returning to the office? What have they missed, and is there anything powerful enough to attract them back?

3.

What adjustments do employers need to make to attract employees back to work and how might technology support them?



Management level
or higher



Never worked from
home before Covid



Currently working
from home
5 days a week

The survey set-up

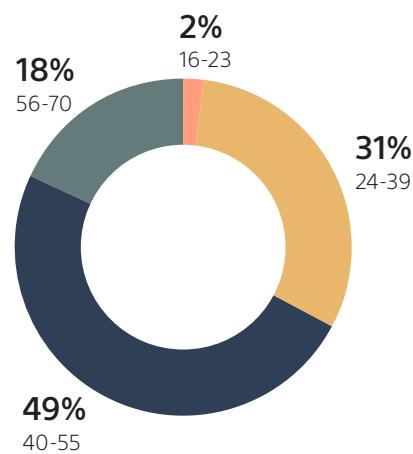
To get answers to these questions, during the latter months of 2020 – just as many countries were entering a second wave of the pandemic – we, the Nimway team at Sony Network Communications Europe, and our partners at Worktech Academy invited over 4000 industry leaders and employees from around the world (predominantly Europe and the US) to participate in the Sony survey.



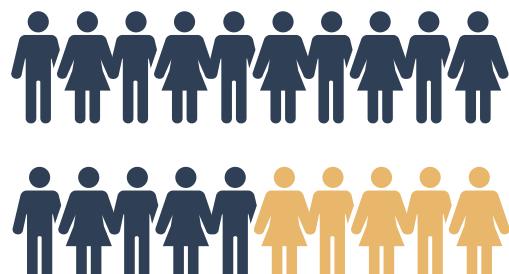
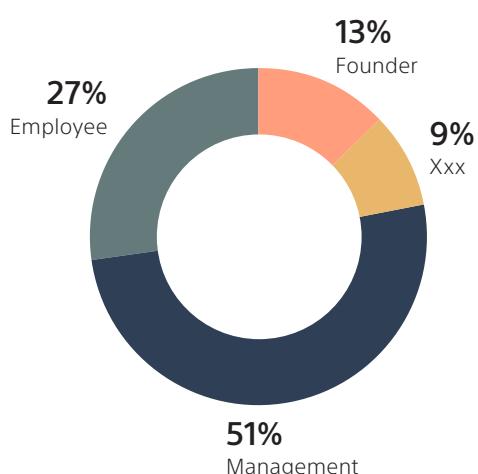
50%

Approximately half of the participants
were aged between 40-55.

Age of respondents



Positions



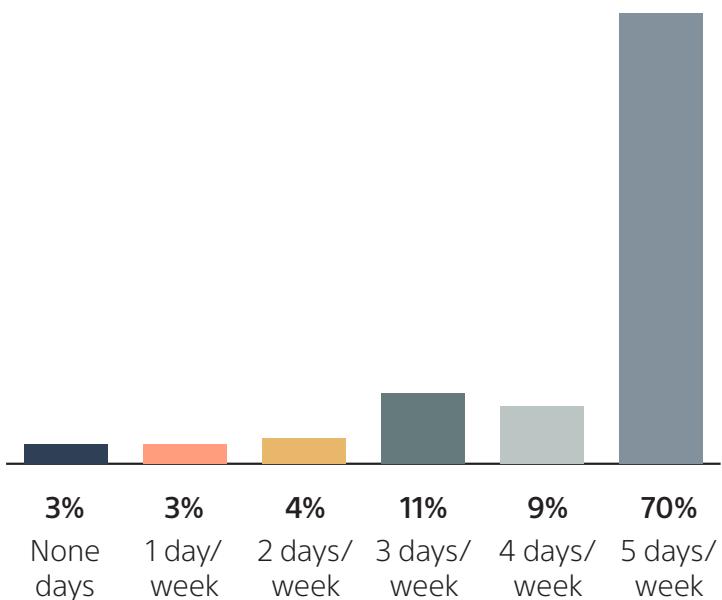
75%

Almost three quarters were in
senior or management positions.

For over half the people working from home full-time during COVID-19, this was a completely new experience.

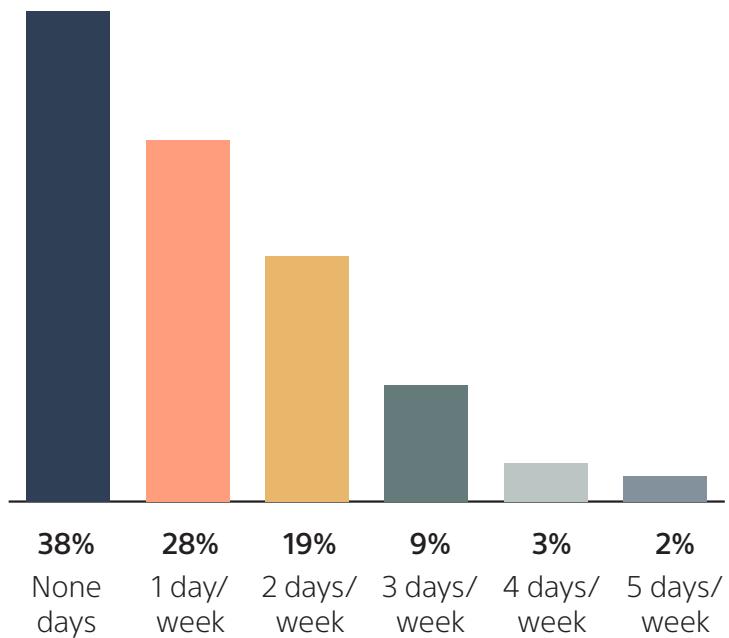
They had *never* worked from home before, which meant they had to make significant adaptations. For example, they had to carve out a home office within their domestic space, master the art of virtual meetings, and become more adept at juggling the demands of family and work.

Currently working from home



For over half the people working from home full-time during COVID-19, this was a completely new experience.

Working from home before Covid-19



In the following chapters you will find the results of our survey along with expert analysis and quotes from participants. Below is a summary of our key findings:



Most people like working from home but admit that some tasks are still best performed in face-to-face meetings, especially if they involve creative collaboration.



The pandemic has highlighted the long-term psychological effects of not meeting colleagues. Many report feelings of isolation, poor motivation and loss of team cohesion.



In the future, office attendance will be more flexible. Employees want to return to work on their own terms and not the terms of their employer or organisation.



The pandemic poses challenges for employers who want to attract employees back to the office. More efforts are needed to boost employee confidence.



The limitations of working from home have become clear, which implies that the office as a physical meeting place still has an important, though somewhat different, role to play.



Technology will play an important role in the future of the office, helping businesses to create a COVID-safe environment, as well as satisfying the expectations of more hybrid workers.

Teams are likely to form 'micro-cultures', and it takes away from the overall corporate culture, which is very difficult to maintain in large organisations while working remotely.

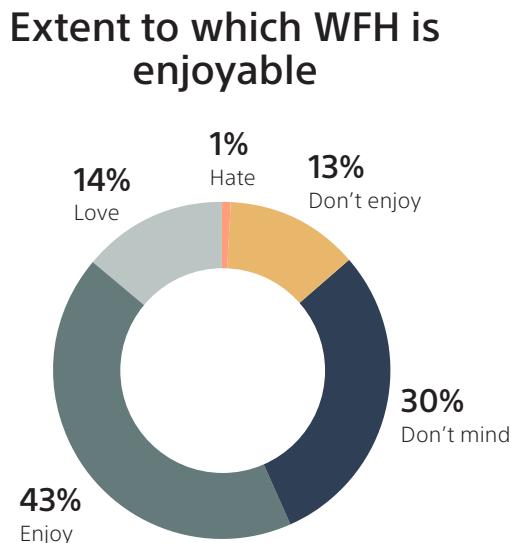


Working from home

How do employees feel about working from home?

What are the limitations of working from home in the long-term?

The dial has shifted from employees rarely working from home to working from home on a permanent basis. This shift is mirrored in the results, with 70% of participants now working 5- days a week from home. In general, participants feel positive about their home working situation but, when asked to elaborate, many of the comments about working from home were negative, with people largely reporting instances of social isolation and difficulties collaborating with colleagues.



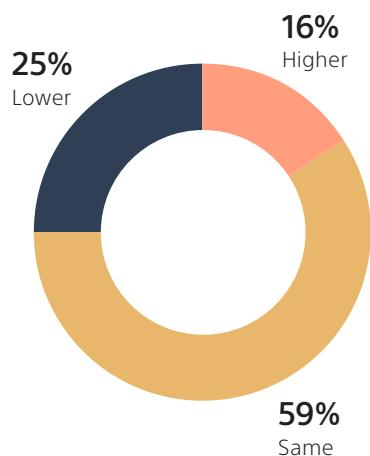
"The longer we've all been working from home full time, the more difficult it is to maintain connections at work as well as to drive new innovation."

Impact on motivation

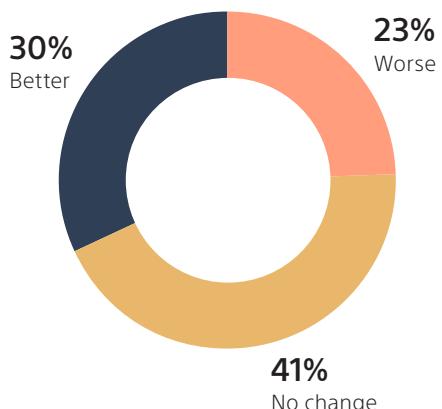
The duration of lockdown and working from home seems to correlate with the level of motivation, productivity and level of collaboration, according to our survey participants' commentary. The results show that the novelty of working from home is wearing off with 23% of respondents claiming their experience is getting worse the longer it goes on. While for many, working from home does not have a major impact on their motivation, a full quarter say that working from home actively lowers their motivation.

"During full lock-down, it was difficult to stay motivated. The collaborative aspect of work was very difficult, keeping in touch with clients was difficult."

Effects of WFH on motivation



Perception change on WFH since beginning of lockdown



Impact on collaboration

While participants report that it is easier to collaborate in small groups (33%) than large groups (11%), findings show that collaboration is, on the whole, less effective from home than in the office. Participants reported that collaboration has become more difficult in larger groups. One even said they simply don't collaborate in large groups anymore.

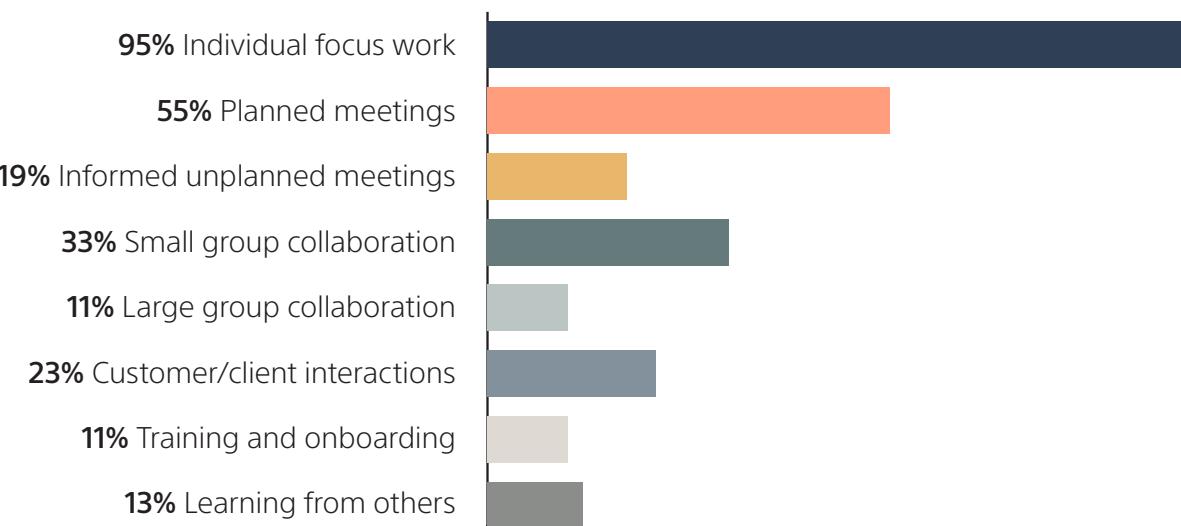
The results show that working from home only really enables individual focused work (93%), whereas other activities such as informal meetings, collaboration and client interaction, training and onboarding and learning from others rank poorly. The data from the survey implies that participants believe they have fewer distractions at home than in the workplace and can therefore concentrate better. However, ad hoc, informal and creative collaboration has suffered significantly.

Not only are informal meetings not successful, they are time-consuming and take away from other tasks. Most collaborative work is now conducted on video and people are scheduling more meetings.

The data on collaboration at home shows that the home environment presents fewer opportunities for distraction and is therefore better for more focused work. However, collaborative tasks are less successful and now take up a large portion of the working day, through scheduled meetings.

"The creative process involves interacting with other members of the company. The virtual method is not effective."

Tasks done best from home



Impact on corporate culture

Ultimately, for a significant number of participants, working from home has had a big impact on the way they work. The comments given on how their work has been impacted centre around the social elements of working, which suggests that corporate culture is suffering as a result of remote working for many organisations, particularly large ones.

People are interacting with fewer colleagues on a daily basis while working from home. This means that teams are likely to form 'micro-cultures', and it takes away from the overall corporate culture, which is very difficult to maintain in large organisations while working remotely.

"Home working is not ideal for organisations with more than 5 people."

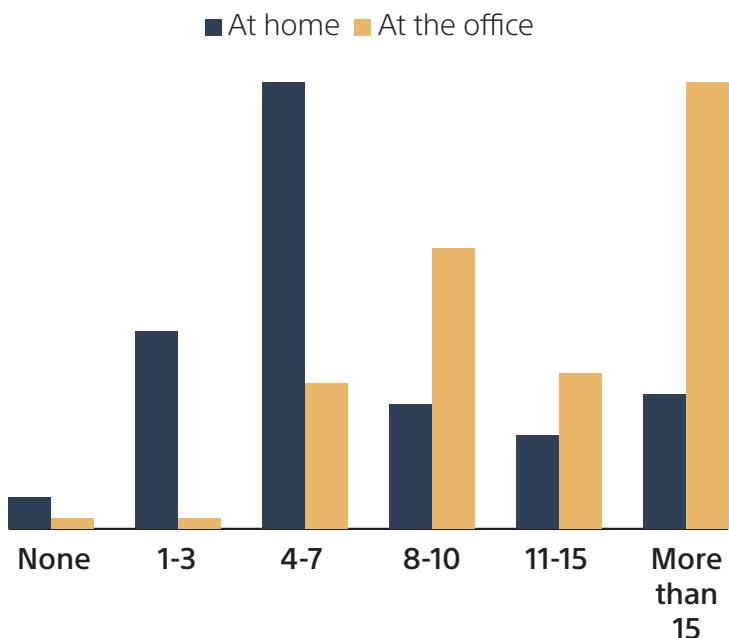
"The problem is that is easy to form a micro culture by the constant interaction of 3 or 4 players... It is something unnoticeable in the beginning, but might twist some of your core principles in the long run... So the alignment of the culture principles of your company or department is a challenge in the medium and long term."

Impact on social interaction

The average number of people participants interact with while working at home is 4 – 7, which is about a third of the number of people participants claimed to have been in contact with daily at the office (more than 15). This means that opportunities for collaboration or social interaction are significantly lower at home, and that the office plays a significant role in enabling social connectivity.

The lack of serendipitous encounters with employees has had an impact on innovation and creativity, as well as making people feel socially isolated. Many participants claimed that they miss their colleagues and the routine of the office.

Average daily interactions



"Non-booked social interaction or just bumping into colleagues has obviously disappeared which has reduced the possibility to take small things once you bump into each other. It is less innovative, inspirational and energizing to be home by yourself working."

Impact on flexibility

While in many ways, working from home offers employees flexibility and autonomy over their working day, the results showed that this flexibility was coupled with more scheduled meetings and longer working days. Many participants commented that the time saved on commuting to work has been replaced by more time on calls.

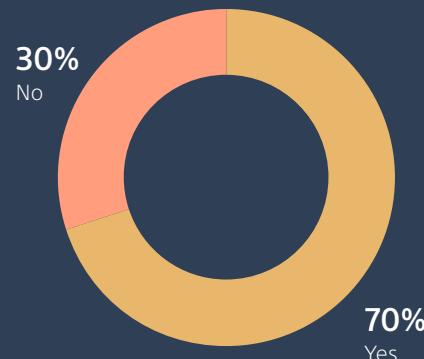
Some stated that the flexibility has enabled them to work outside the traditional 9-5 mentality and their working hours have become more fluid. In this way, it has increased productivity.

Despite new working rhythms, the working day also needs to be planned more in advance to ensure employees can talk to the right people. Some participants reported that increased advanced planning means they are spending more time at their desk than they would in the office. To some extent the increase in calls cancels out the time won by not having to commute, thus restricting the amount of true flexibility afforded to employees.

Working from home permanently would pose three key issues:

1. It doesn't scale very well for bigger meetings and collaboration
2. It misses the fluidity and spontaneity of social connection
3. It becomes monotonous due to the lack of variety in work settings

Has WFN impacted the way you work



I miss interaction with colleagues and routine of the office

Excluded from colleagues and I am working longer days

I don't collaborate in large groups anymore

Difficult to learn corporate culture for new people

WFH isn't sustainable in the long term because it's difficult to manage teams and work with clients and partners

Saved commuting time, but spending more time on calls WFH

Home working is not ideal for organisations with more than 5 people

To summarise, the results show that working from home presents significant challenges regarding collaboration, company culture, and social interaction. On the plus side, people prefer working from home for individual work and flexibility and autonomy over their working day. The limitations of working from home give an indication of the office's new role, as there is clearly an appetite to get back to collaboration and serendipitous meetings with colleagues.



**The primary
focus of getting
back to the office
environment is
for social reasons.**

Returning to the office & the new function of the office

- How do people feel about returning to the office?**
- What aspects of office life are drawing people back in?**
- Why will the office matter after Covid-19?**
- What is the new role of the office?**

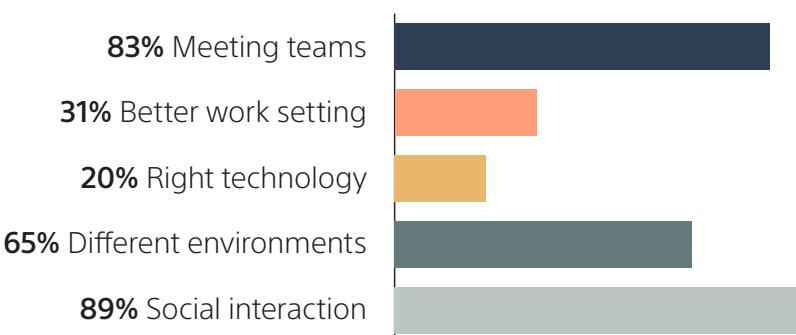
One of the key concerns about returning to the office is that the teams will be dispersed and hybrid and therefore spontaneous interactions won't be possible. Quite simply, the necessary people might not be around on the right day. While flexibility and autonomy over where employees work are key criteria for returning to the office, this also presents some challenges.

"I'm concerned that I won't find the people in the office that I am hoping to connect with or collaborate with. I assume we will maintain some of this level of flexibility (which is a great thing), but that will make it harder to coordinate to come into the office at the same time and on the same days."

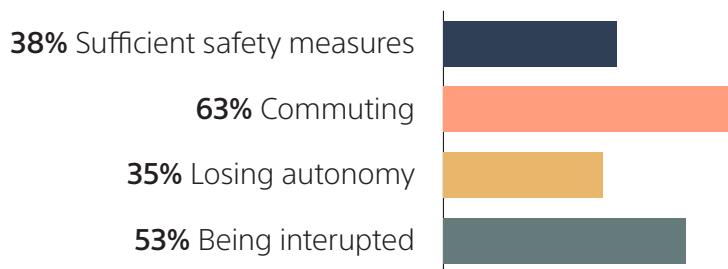
The key reasons why people want to return to the office are to meet up with team members (83%) and social interaction with different people (89%). This indicates that the primary focus of getting back to the office environment is for social reasons.

However, there are still short-term apprehensions regarding safety, such as the risks of commuting to or from the office (63%).

Incentives to return to the office



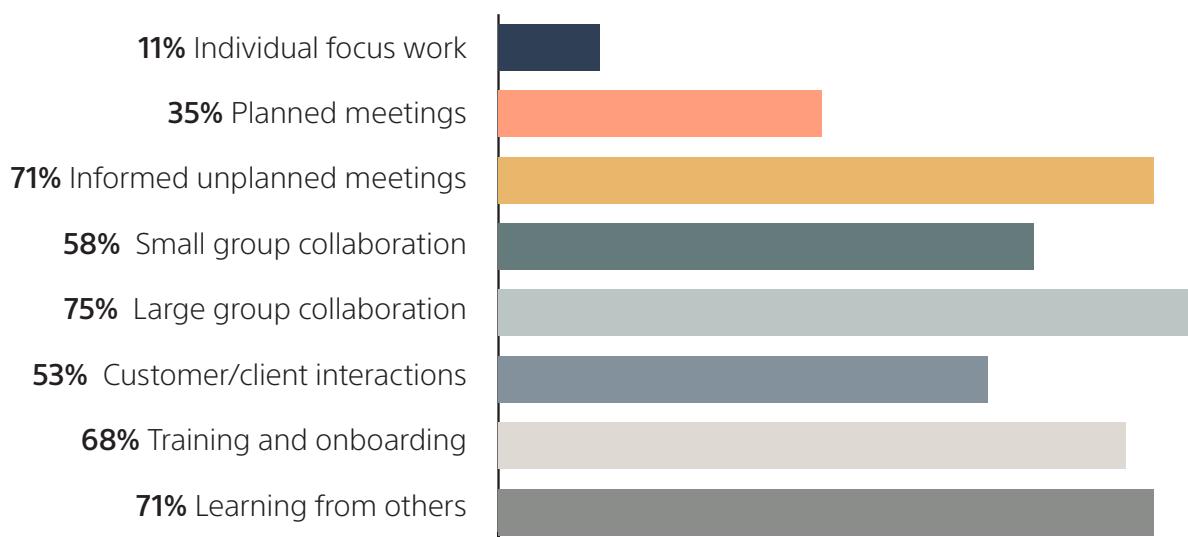
Concerns about returning to the office



Social

While the downsides of working from home largely revolve around the social needs of employees, social interaction and collaboration is clearly one of the big successes of the office, particularly on a larger scale. According to the survey results, systematic, procedural and formulaic work is better done at home, whereas more experimental, creative and ad-hoc work which involves the chemistry of human interaction is better done in an office space.

Tasks done best from the office



One of the primary functions of the office is to facilitate spontaneous social interactions and informal collaboration.

Our research shows that people want to return to the office to get more variety to their working day. They do not want to go back to the rigid routine of daily attendance at the office, but instead they do want to interact and talk to peers. Three quarters of the participants believe that large scale collaboration is best done in the office environment, closely followed by informal, unplanned meetings (72%) and learning from other (72%) – these are the areas that rank worst in a working-from-home setting. We therefore conclude that one of the primary functions of the office is to facilitate spontaneous social interactions and informal collaboration.

The emphasis in the future office should be placed on quick, informal interactions to contrast the planned nature of meetings in a remote workforce.

"Interactions now are all time-tabled, scheduled and virtual so the effect is twofold; the smaller, quicker, less important interactions – a simple question/answer – that would previously have taken place multiple times daily now doesn't happen at all. The more 'important' interactions – the planned meetings – are also less productive as the dynamic of virtual meetings, whilst better than having no meeting at all, does not reproduce the natural effectiveness and positivity of a real, live meeting."

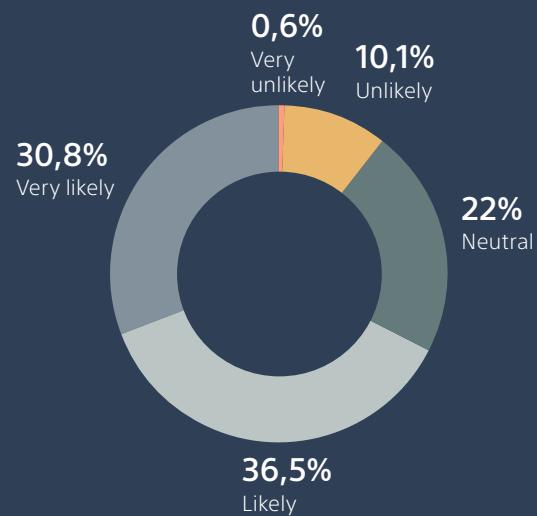
How effective are virtual meetings?

During the early days of the pandemic, online meeting services experienced a huge boom. They fulfilled an important need by enabling employees to meet one another online even when they couldn't meet in person. However, after a full year of working from home, many users have come to see video conferencing as a 'necessary evil'.

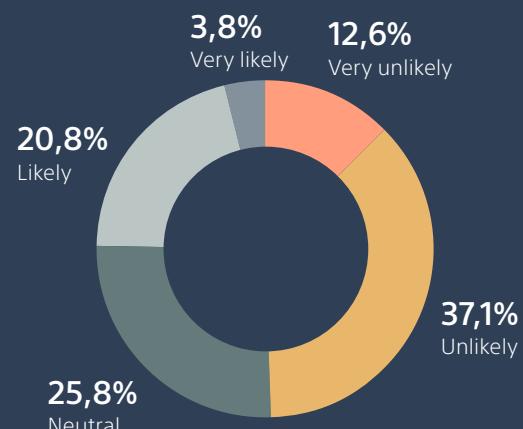
Online meetings are often plagued by technical issues and consequently begin late. During meetings, slow internet connections cause lagging and break the natural flow of the conversation. This is compounded by employees' inability to read subtle visual cues, which means people all start talking at the same time or find they are unable to interject when someone else is talking. While experience goes some way towards solving these issues, many still find online meetings tricky.

After a full year of working from home, we wondered if there was a general consensus on video conferencing. The chart below shows that most regard it as a useful tool for team check-ins, presentations and professional training. However, it is seen as a less satisfactory tool for brainstorming sessions, informal discussions and other kinds of creative collaboration.

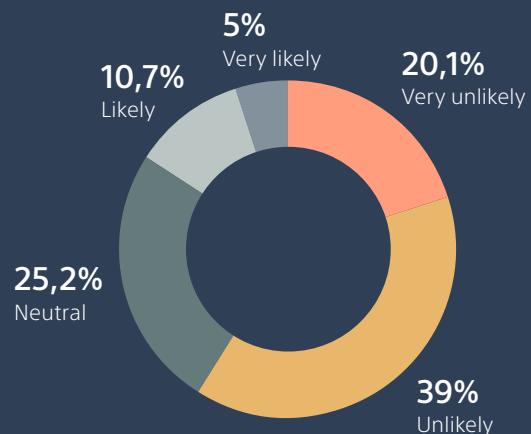
Team Check-ins



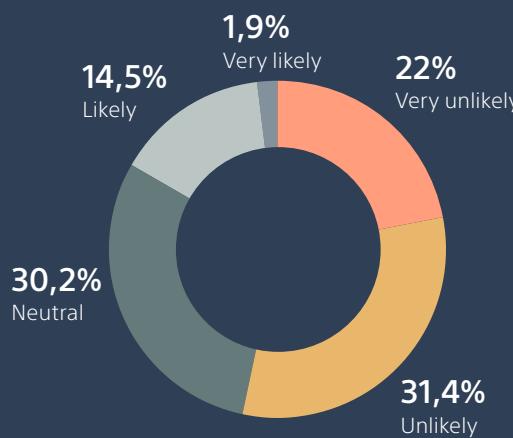
Brainstorming



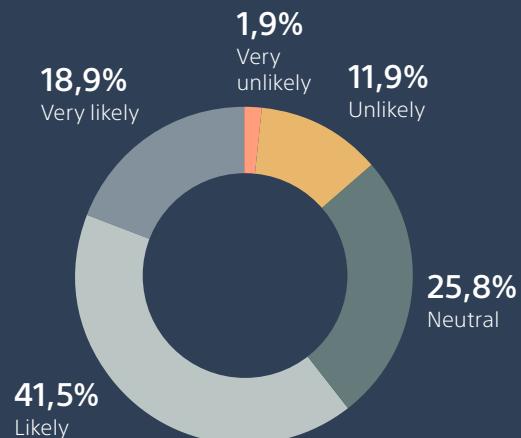
Creative collaboration



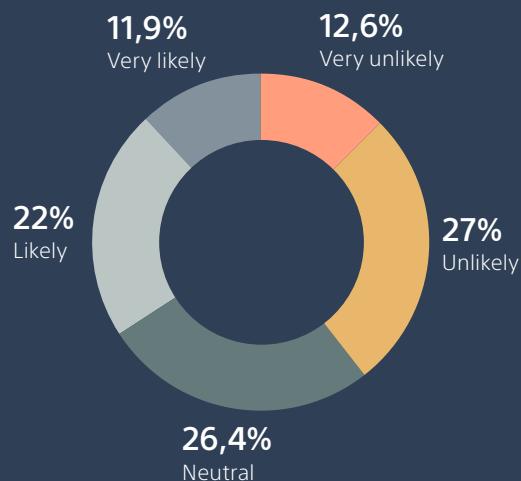
Onboarding new team members



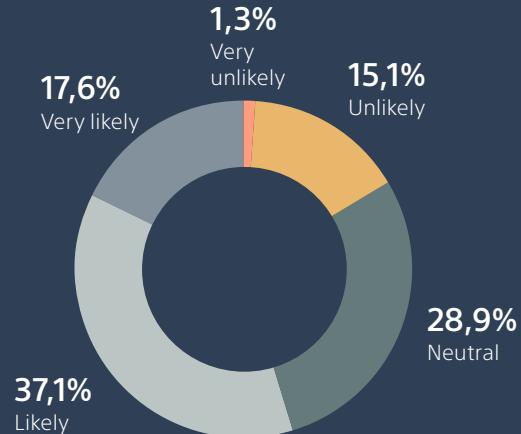
Presenting



Informal discussions



Professional training



Most regard it as a useful tool for team check-ins, presentations and professional training

Team check-ins

36,5%

Presenting

41,5%

Professional training

37,1%

Environmental

It is clear from the findings that people are generally not nostalgic about their former office environments. Much of the qualitative data refers to the frequent distractions and noise disturbances in open plan offices. However, this has not deterred people from wanting to return... although the balance of power seems to have shifted.

Employees want more flexibility and autonomy over where they work. While there is a significant appetite to return to the office, 93% of participants said they want to return on a flexible basis. This means they want choice and variety in their daily work. Going to the same place every day, be it at home or the office, can be monotonous and fatiguing, which consequently impacts energy, motivation and engagement.

"I don't want to sit at a desk in the middle of a noisy environment doing concentrated work; I need somewhere quiet to do it."

Technological

When stating the reasons why they want to return to the office, less than 20% of participants said 'technology' was their primary reason. This does not necessarily mean that the remaining 80% managed technology tools in the home environment seamlessly; rather that the majority of those surveyed had other more important reasons for wanting to return, such as the need for more human interaction and proximity to colleagues.

Team building and relationships

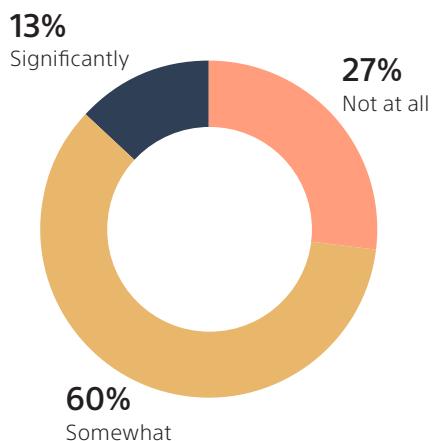
Participants recorded that the lack of face-to-face contact has impacted the cohesion of teams with more than half (57%) claiming that team cohesion has been affected by working from home. However, the qualitative data found that teams had been both negatively and positively affected. Some claimed that their teams now have more frequent, informal interaction whereas others feel distanced from their team or organisation.

Other comments focused on the physical and emotional distance to colleagues, particularly those who were not of their direct team.

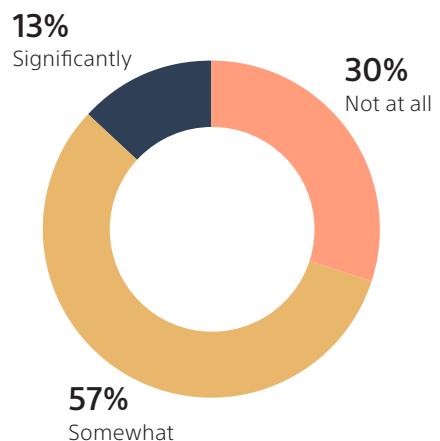
The data shows that while team dynamics have changed, in some cases the bond with direct teammates has been strengthened. But employees' sense of connection to the wider organisation and colleagues outside the team is diminishing. And those chance meetings in the canteen or corridor which may once have led to cross-pollination between departments are clearly not happening. We therefore conclude that the function of the office is to bring cohesion and diversity and a sense of belonging to the organisation, which is essential for a successful business.

"We are interacting more informally than before Covid-19. You get to see a glimpse of people's personal life and this has strengthened our bond."

Have relationships with colleagues changed since WFH?



Has team cohesion changed since WFH?



Opportunities for the future office

The results identify clear limitations in current working patterns and provide a direction and path of opportunity for the future office environment. The data points to three key areas of potential improvement:

- Increased flexibility
- More targeted office design
- Technology to enable work

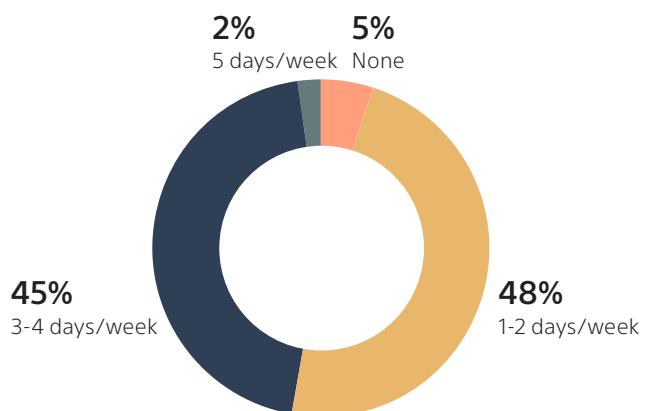
"I find that there are a number of activities and interactions in my role that really require face to face interaction. I wouldn't like to only work from home and would ideally go with a '3 days at home and two in the office' split one week and then the reverse the following week."

A hybrid approach

As previously mentioned, there is clearly an appetite to return to the office, with the caveat that employees can decide when and where they work on a daily basis. People want the option to work both in the office and from home. There are a number of critical roles that are significantly better suited to the office such as onboarding new employees, collaborating with colleagues and learning from others.

The office is therefore likely to become just one of several places in an ecosystem of workplaces. This will mean the office environment will have to provide clear advantages in order to attract employees back. One element will be that work schedules better accommodate the employees' work/life balance. Ultimately, the office will become a destination where employees choose to go rather than being required to go.

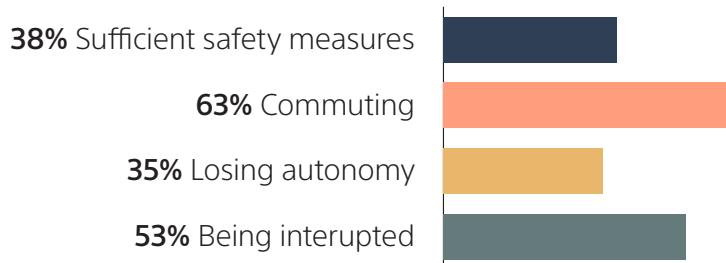
Average days a week people want to return to the office



Opportunities for the future office

Given the fact that the pandemic is not over, many employees are apprehensive about the health risks involved in returning to the office. They have adopted new habits such as wearing masks in public places and avoiding close contact with others. How will these new habits translate into an office setting? How will we cope with not sitting beside our colleagues, eating lunch at separate tables and no longer shaking hands to seal a deal? How will those of us who have enjoyed the autonomy and better concentration afforded by working from home readjust to being among our colleagues?

Concerns about returning to the office



"Stress about being out in public and bringing COVID home to my family makes going into the office not a very real option even though our office is open to employees who wish to return."

What can employers do to make their staff feel safer?

Measures to enhance employee safety have already been implemented in some organisations, but only 38% of our survey group thought their companies had done enough.

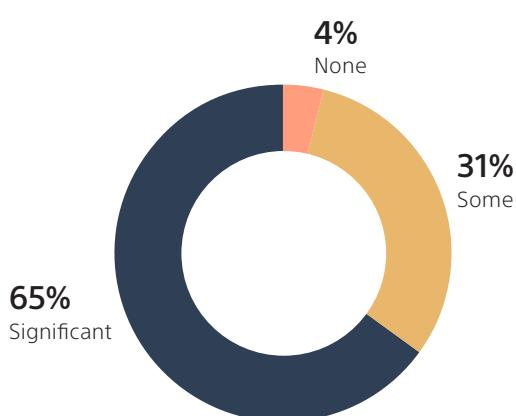
By extension, we can conclude that 62% thought more efforts and better compliance were needed to make people feel confident about returning. This is especially interesting in the light of the figure below, which illustrates that 65% of companies have already made significant changes in the workplace.

Of the possible measures suggested, 'regular cleaning' scored highest with 58% of people saying that proper cleaning routines were 'highly important'.

Another more general conclusion is that workspaces need to be reconfigured for social distancing. Over half the survey participants saw this as necessary, taking into account the need for a lower staff density in shared workspaces and a safer flow of people throughout the building. Almost half (46%) of those surveyed thought the implementation of touchless technology was also important, and 41% wanted to see desk-booking software in place.

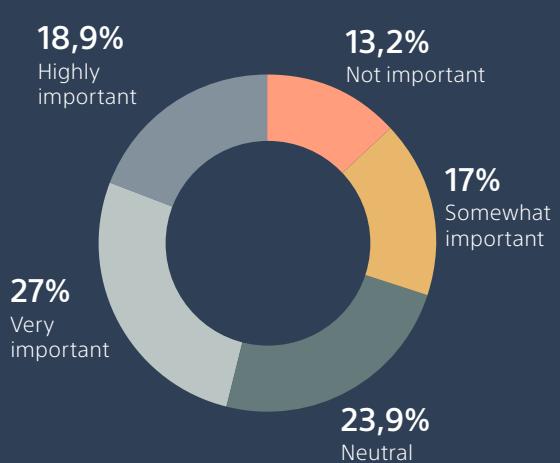
Smart office technology can be used to provide data-driven ways to inform people of things like real-time office occupancy levels, and notifications when someone in the office gets infected.

Extent to which companies have implemented safety measures in their workplace currently

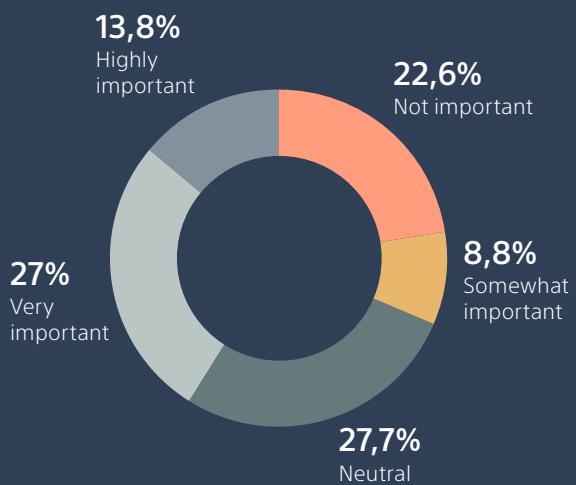


"My workplace has put great safety measures in place but it is still up to people to follow them."

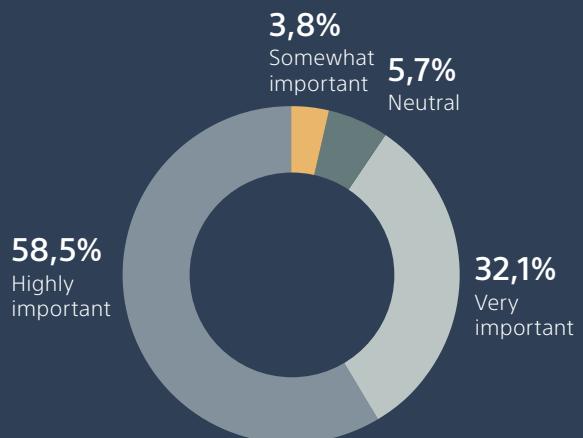
Touchless technology



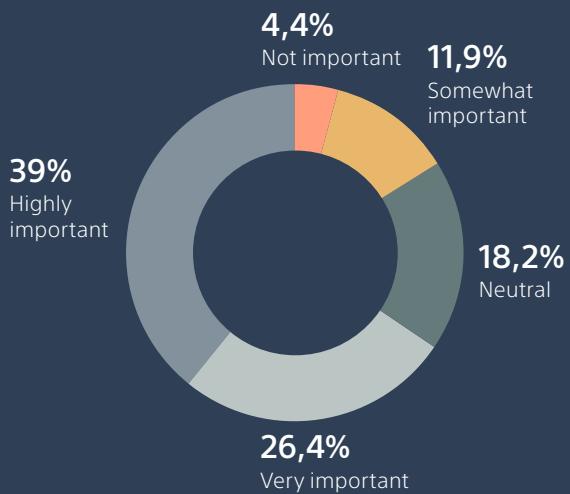
Desk booking software



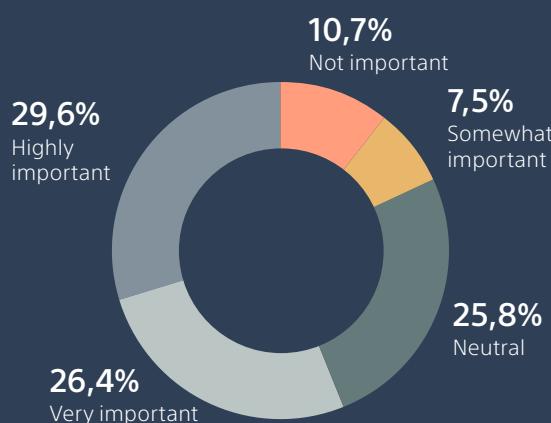
Regularly cleaning



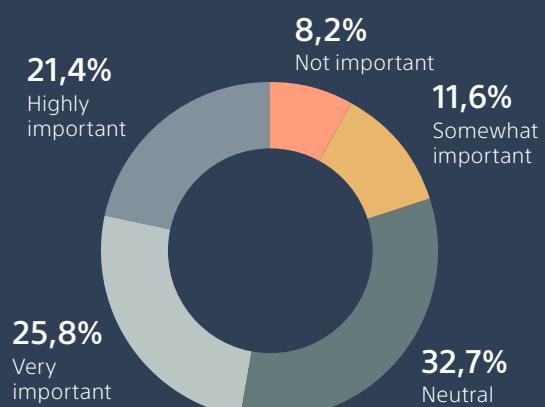
Lower density in shared spaces



Reconfiguring workspace



Improving people flow throughout the office



Technology to support tomorrow's workforce

Technology will be required to support a variety of options, to make employees feel safe and provide them an informed choice about where they should work on any given day.

One of the challenges of a more hybrid workforce will be scheduling and accommodating employee choice while at the same time making sure there is a critical mass of people at the office to benefit from interaction and collaboration. This could be solved by managers arranging for their whole teams to come in on specific days. Alternatively, companies might choose to take advantage of the available technology to inform employees of who is in and integrate this information with their individual daily schedules.

"The office will need to implement software that recommends when to work in the office based on who is in and what meetings you have. Also, a clear indication when accepting meetings as to who is attending in person vs virtual."

Redesigning office space

The office environment needs to be more calibrated towards social interaction and a variety of work environments, according to the results. The old layout of rows of desks will be needed less as some employees will continue to work from home, and will only come to office in search of a specific work environment. Several participants noted that the office will need more spaces for team collaboration, social interaction, learning and development.

These changes to the workplace will see the office become a community platform for idea sharing and collaboration. While traditional desking and workstations may not be as important as before, good quality common areas with good ergonomic seating will take their place.

Ultimately, the results of our survey show that 'work' is no longer defined as a place, but rather as an activity. This trend was already underway before the pandemic arrived, and COVID-19 has certainly served to accelerate it. Given that this is the case, tomorrow's office needs to support and enable the types of work which cannot be effectively done at home.

"We need to anticipate a changing workplace to encourage people back and create a more compelling offers that supports collaborative working."

Nimway, people-centred office technology from Sony

As offices gradually reopen their doors, Nimway is helping business owners implement their new COVID guidelines in the office environment, with features to control workplace density, reduce the risk of infection from touching common screens, and optimise cleaning routines.

In addition, Sony's smart office solution facilitates everyday tasks like booking meetings and locating colleagues, while also helping facility managers monitor occupancy and optimise the use of space.

To learn more about Nimway, visit <https://nimway.com/>
or get in touch >>