



THE POST-PANDEMIC WORKPLACE

**How Covid-19 has changed
and accelerated the transition
to the future workplace**

CONTENTS

03	INTRODUCTION	22	SECTION 4: THE FOCUS ON HEALTH AND WELLBEING
04	SECTION 1: THE FUTURE IS REMOTE	24	The wellness-centric office
06	The severe impact on employees and businesses	25	The remote working package
07	Employers' response to the crisis	26	The importance of quality food and drinks
08	SECTION 2: CHANGING CULTURE AND EMPLOYEE EXPECTATIONS	27	SECTION 5: THE EVER-GROWING IMPORTANCE OF SUSTAINABILITY
11	Remote working requires trust	29	Refocus on recycling
12	Businesses must find the right balance	30	Sustainable spaces, practices and policies
13	SECTION 3: EVOLUTION OF DESIGN AND SPACE	31	Optimising your workspace for the future
17	Innovations in real estate	32	Empower your people no matter where they work
18	Branded homes	34	APPENDIX
19	The office playbook	36	REFERENCES
20	The creative social hub		

INTRODUCTION

Last year at **Nespresso**[®] Professional, we wanted to find out what the future of work looked like for businesses across the UK, so we partnered with the Future Laboratory to complete our Workplace Futures report. We discovered that organisations were making significant changes to their working environments so they could meet the shifting needs of their people.

As new generations began diversifying the workforce, we saw an increasing demand for flexible working hours, wellbeing-centric workspaces and value-led company cultures. Co-working spaces were growing in popularity, and the adoption of new technologies were transforming the way we worked...



of Millennials identified flexibility as a top priority when job hunting.¹



of office workers said the quality of their workspace was important to their mental health.²



81% of French, **78%** of US, **74%** of British and **68%** of German millennials said it was important for the business values to match their own.²



The Global Coworking Unconference Conference (GCUC) estimated that the number of global co-working members would reach **5.1m by 2022**²



of UK workers believed that AI would help reduce mundane tasks

AND



thought it would benefit their current job.²

Of course, it is no surprise that the past few months have had a significant impact on businesses' priorities – and in the wake of the UK's lockdown, these expected trends have all been subject to change. So, what we wanted to know is, how have the recent events impacted the way people are working now? That's why we surveyed over 500 UK employees across all levels of seniority, 11 different industries, covering 9 UK regions, and also took the time to interview a panel of 7 industry-leading experts on the matter.*

Our goal? To discover how people feel about returning to the office, what they expect from their employer and their workspace, and what the future of work will look like in light of these changes.

HERE'S WHAT WE LEARNED...

SECTION 1: THE FUTURE IS REMOTE



At the onset of the Covid-19 pandemic in March 2020, thousands of businesses across the UK transitioned to full-time remote work.

In fact, our survey found that only 6% of respondents worked at their usual place of work throughout lockdown, whilst the majority worked remotely, and many continue to do so...*

Many businesses once relied on an office space for the daily running of their business, but **65% of our survey respondents are still working from home, and 42% do not know when they are returning to the office.***

This suggests that while businesses had the ability to begin the transition back, they have been able to adapt to accommodate remote working into the unforeseeable future.

(Figure 1)

Figure 1: Which of the following most closely represents your current working situation?



This is consistent for most regions of the UK, with the exception of those in the East of England, where 44% remained or have now returned to working in the office.*

Those who needed to be in the office and had little flexibility pre-Covid have returned...



26% of respondents are now back to working in the office – but 42% of this group have only recently returned.*

It's worth noting, however, that the figures vary slightly depending on the employees usual place of work. Our survey showed that those who work from flexible workspaces have been able to return sooner, likely due to the additional measures these spaces have been able to put in place at no additional cost to the business...

For those who usually work in a co-working space, 23% had been traveling to the office during Covid-19 and 37% of those in co-working spaces are now back working from an office environment.*

THE SEVERE IMPACT OF COVID ON EMPLOYEES & BUSINESSES

It's clear that the coronavirus has had significant impact on employee wellbeing nationwide. With many workers stuck in their homes and isolated from colleagues,

friends and family, it's not surprising that both the morale and mental health of workers was one of the first things to take a hit...



2 out of 3

employers say that maintaining employee morale during the pandemic has been a challenge.³

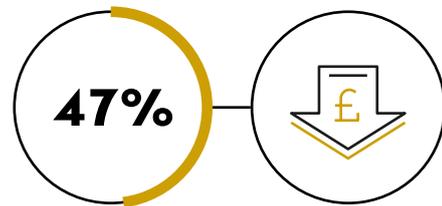


79% of businesses report a surge in employee requests for mental health support.⁴

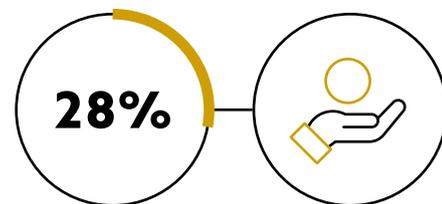
Of course, the impact that coronavirus has had on the majority of businesses is just as equally severe, with many forced to temporarily shut their doors, furlough large numbers of their workforce or make employees redundant.

Almost overnight, non-essential organisations had to digitally transform to facilitate remote working, whilst essential businesses quickly implemented social distancing measures to protect their customers and staff, including the installation of protective screens, floor markings and one-way traffic systems.

Whilst managing all of these changes, businesses also had to contend with nationwide economic uncertainty...



47% Of businesses that continued trading, 47% reported a decrease in turnover compared with what is normally expected for the time of year.⁵



28% Across all industries, 28% of businesses reported they had no or less than three months' cash reserves.⁵

EMPLOYERS' RESPONSE TO THE CRISIS

So, how have business leaders managed all of these changes?

Well, many have made additional investments in their people, processes and infrastructure.

MENTAL HEALTH SUPPORT

To ensure employees received the extra support they've needed over the past few months, 70% of businesses have increased their investment in mental health support for their people.⁶ And many believe that this investment will continue into the future.

88% of survey respondents think that employee mental health support will now receive greater backing at board level.⁷



INVESTING IN DIGITAL

To facilitate remote working, businesses across the UK invested heavily in digital transformation, with employers enabling access to Virtual Private Networks (VPN) and integrating digital technologies such as video conferencing software across their organisation. In fact, the web and video conferencing category for business technology saw a 500% increase in buyer activity since the Covid-19 outbreak began.⁸ Many businesses who remained in the office have also optimised their working environment with apps which determine who is visiting the office and when, enabling these businesses to better manage social distancing measures.

Recent data shows that we have leaped five years forward in consumer and business digital adoption in a matter of around eight weeks.⁹

CREATING A THRIVING ONLINE CULTURE

From hosting online quizzes to encouraging virtual coffee meet ups, employers have been utilising a variety of techniques to ensure they create an inclusive company culture, in spite of remote working. Companies have been able to embrace flexible working, with opportunities for their workforce to choose more suitable working hours to fit around their home care needs. During the lockdown, this has empowered many parents to care for their children following widespread school and childcare closures.

Business consultancy firm Clutch found that businesses are hosting a variety of virtual events, including:



Professional development sessions (19%)



Happy hours (13%)



Activities and games (9%)



Meals (5%)¹⁰

SECTION 2: CHANGING CULTURE AND EMPLOYEE EXPECTATIONS

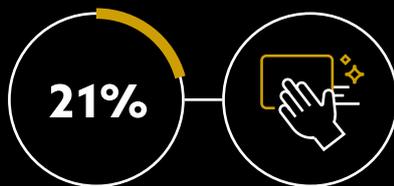


In spite of all of the struggles brought about by remote working, employees have recognised the benefits, as **47% said they've been using the time they would normally spend commuting to connect with their family.**¹¹

However, in the United States, 29% of employees said they struggle with work-life balance when working from home,¹² whilst 38% of our survey respondents agreed that they would like to work from an office if it was close to where they live.* This indicates that employers may need to find a more nuanced solution that meets the varying needs of their people.

EMPLOYEES ARE WORRIED ABOUT RETURNING TO THE OFFICE

When it comes to returning to the office, our survey revealed that employees are concerned with the cleanliness of their workspace...



21% of those surveyed

express their biggest concern about returning to the office is cleanliness.*



To ensure social distancing, 80% of employees said

there should be sectioned-off offices and a phase-out of open-space offices, and 78% think employers should stagger employees return to the office.¹³



87% said employers must have clear guidelines outlining safety precautions before they allow employees to return to the office.¹³



74% say workplaces must have a supply of hand sanitizer in order to re-open.

Other measures include use of personal protective equipment (PPE) (58%), physical barriers/reconfigured workspaces for social distancing (56%), and temperature tests (55%).¹³

Whilst health is the priority for workers, they are also concerned about their wellbeing, as **19% of overall survey respondents said they're worried about how they will maintain the same work-life balance they have experienced under remote working conditions.*** This was even more important for those in co-working spaces with the percentage concerned increasing beyond this...



54% of those working from co-working spaces are concerned about maintaining a work-life balance.*

Co-working spaces are often used by businesses who operate more flexibly, and as such this increased level of concern may be due to the commute required to access these spaces if they are not close to employees' homes.

Socialising, collaboration and technology were also key concerns, but these varied depending on the size of the employee's' business...

49% of those in medium businesses and 41% in large are most concerned about how they will be able to collaborate and socialise safely followed by how they will maintain business culture.*

For those working from home offices, collaboration was less of a worry – probably because they are already accustomed to remote work. For this group, technology was at the top of their list of concerns...



43% of those who typically work from home are most concerned about variations in technology now that businesses are working from various locations.*

These results also varied by job role. It seems that while senior management are concerned about sustaining culture, collaboration and connectivity, employees are most concerned with the cleanliness of the office environment, maintaining a strong work/life balance and ensuring they can collaborate effectively.



REMOTE WORKING REQUIRES TRUST

There's no doubt that in the wake of the lockdown, employees' expectations of where they will be working has changed dramatically. In fact, our survey found that 49% of businesses expect to spend more time working from home than before, whilst 30% of employees want to have more remote working.*

In light of this, Director at Fourfront, Aki Stamatidis, said that he'd like to see more trust in the workplace, as employees have proved that they can be relied on to work productively away from the office. He believes that the future of remote working will be underpinned by a greater reliance on the workforces' capabilities, which must be supported with the right technology...

“

EMPLOYERS NEED TO TRUST THAT THEIR PEOPLE WILL MAKE THE RIGHT DECISIONS REGARDING THEIR WORK AND THEIR PRODUCTIVITY, BUT THEY ALSO NEED TO GIVE PEOPLE THE TOOLS TO MAKE THESE DECISIONS.

Adding to this, Richard Watson of Now and Next and visiting Professor at Imperial College London, thinks that this may lead employers to create more personalised contracts and agreements based on their employees' abilities.

A DIVIDED WORKFORCE

Whilst many employees are interested in working remotely in the future, 30% of our survey respondents stated that they want to return to the office in the same capacity as before, and 35% expressed their happiness to return to the office if the conditions are right.*

These conditions include the purpose the office will be used for and proximity to their home. These concerns also fluctuated based on business size and the types of office environment businesses have been used to pre-Covid...

40% of those who did not have access to remote working previously are happy to return to the office full-time, but those who had an increased amount of flexibility have a greater desire to work from home more often.*

Those in co-working spaces appear to have favourable working conditions, with 46% of people who currently work from these locations wanting to return in the same capacity as before.*

Meanwhile, 38% of permanent remote workers would like to work from an office if it was close to where they live.*

BUSINESSES MUST FIND THE RIGHT BALANCE

After reviewing all of our survey responses, it's clear that there is a divide between businesses who are now looking to create a new working model following Covid, versus those who are anticipating returning to their original ways of working. Equally, there is no clear consensus among businesses as to the correct working environment or the best way to work in future. Businesses will therefore need to find the right balance to suit their requirements and keep employees content.

Given there is a significant demand for home working and also an equal desire to return to the office in some capacity, it seems that organisations would benefit from the adoption of a hybrid working strategy, with the opportunity to work from home some of the time, as well as the choice to come into the office or a third space to work, connect and socialise on a regular basis. The workspace has proved to be less of a place employees need to be and instead want to be.



On top of this, businesses must also consider how they can optimise their employee offering to meet the shifting needs of the workforce.

According to Linzi Cassels, Principle and Design Director at Perkins + Will...

“

ORGANISATIONS WILL HAVE TO OFFER MORE THAN JUST WORKING FROM HOME TO APPEAL TO THEIR EMPLOYEES AND FUTURE TALENT.

THEY NEED TO OFFER A NEW WORKPLACE EXPERIENCE WHICH INCLUDES MORE AMENITIES. SPACE NEEDS TO BE DYNAMIC AND MORE REPRESENTATIVE OF THE VALUE AND ETHICS OF THE COMPANY.

FOOD AND DRINK OFFERING WILL BE AMPLIFIED – FREE COFFEE IS NO LONGER A PERK, UNLESS IT'S GOOD COFFEE.

SECTION 3: THE EVOLUTION OF DESIGN AND SPACE



It's clear that the office remains highly important for businesses. However, it will need to be an adaptable and flexible space to meet the shifting needs of employees. **So, how will employers update their workspaces to meet this demand?**

Here are the key trends that are appearing post-Covid.

THE RISE OF CO-WORKING SPACES

Co-working spaces give employees the freedom to work independently at a location closer to their home, whilst still enjoying the benefits of a collaborative environment.

Our research revealed that co-working spaces have proved invaluable during the UK's lockdown, and this is likely due to the flexibility and work-life balance that co-working spaces offer, as well as the facilities and measures these spaces had in place during the pandemic and with no additional expense to the business.



Providing employees with a variety of places to work can increase productivity levels and boost engagement.¹⁴





Now that many employees have had a taste of homeworking and the ‘hospitality’ workplace experience, it seems many are eager for this trend to continue. In fact, when we asked employees what amenities they would expect from a third space offered by their company, there was an **increased expectation for amenities directly linked to collaboration, communication and connectivity, quality technology and all-around cleanliness...**



49% would expect a third space to have amenities directly linked to collaboration, communication and connectivity.* **(Figure 2)**

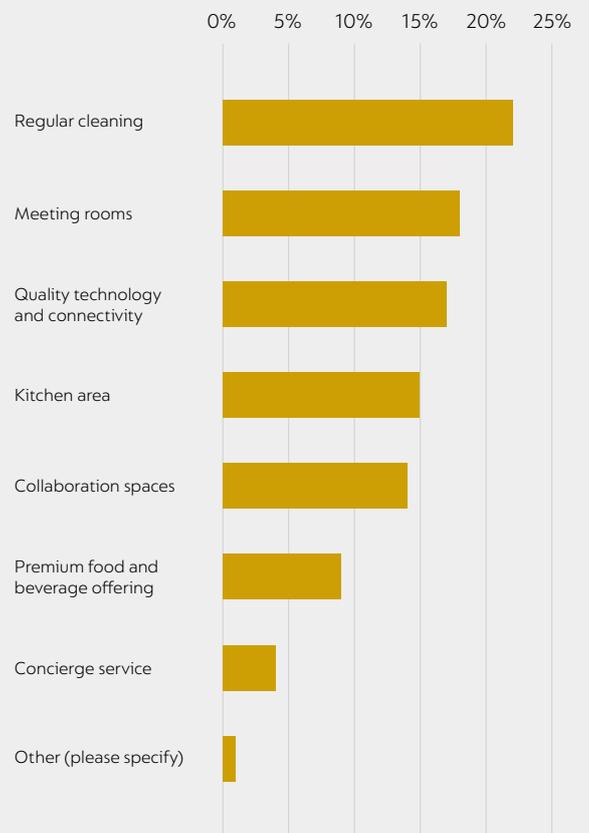


22% would expect a third space to have regular cleaning at a minimum.*



17% expect quality technology and connectivity.*

Figure 2: If your company decided to use a ‘Third Space’ working hub, what amenities would you expect it to offer?



When broken down by job role, we found that these expectations shifted depending on seniority, indicating that whilst lower-level employees are concerned with their health and safety, senior-level employees are most interested in ensuring their employees have the tools they need to complete their work.

Those in lower-level roles have a greater expectation for cleanliness (**66% of entry-level employees and managers**) and meeting rooms (**54% of entry-level and managers**), whilst those in senior roles (**53% of directors**) have a greater need for quality technology and connectivity services.*

For those who are already working in shared office spaces, expectations are even higher, with an increased demand for a premium food and drink offering and a concierge service...



60% of those surveyed would expect a third space to have regular cleaning at a minimum.*



54% would expect a third space to have amenities directly linked to collaboration, communication and connectivity.*



46% would expect a kitchen area and 34% would expect premium food and drink.*



31% expect quality technology and connectivity.*



26% would expect a concierge service.*

These increased expectations are undoubtedly due to this group's understanding of the realities of co-working spaces, indicating that these businesses have already had access to these high standards or additional amenities and now see it as a requirement.

So, how prevalent is the use of co-working spaces likely to be over the next few years? Co-working spaces have given businesses the ability to return to the workplace when they couldn't afford to own or rent their current premises under a permanent contract, so we anticipate there will be greater demand going forward. In addition, flexible and co-working spaces are now the fastest-growing type of office space in commercial real estate.

They currently comprise of less than 5% of the market but are expected to make up 30% by 2030.¹⁵ In fact, our survey revealed that 34% of enterprise businesses see themselves utilising co-working and collaborative spaces in the future.* This compares with 30% of small businesses who see office spaces being used for socialising and creative thinking going forward.*

INNOVATIONS IN REAL ESTATE

Following the growth of localised and co-working spaces, businesses will need to adapt fast to ensure their offices are still being utilised. According to Linzi Cassels, Principle and Design Director at Perkins + Will, their more conservative clients are thinking long-term about how they need to change their real estate to reflect this growth.

Linzi believes that this will result in the conversion of many office spaces into residential areas, resulting in the rise of secondary cities as people start to move outside of central areas like London.

“

REAL ESTATE IS IN TROUBLE. OFFICES COULD BECOME RESIDENTIAL, AND WE MAY SEE A RISE IN MIXED DEVELOPMENTS.

Richard Watson – Now and Next, Visiting Professor at Imperial College London

THE BLENDED STRATEGY

Our survey found that 21% of people would actually want to commute to the office if it was closer to where they live, indicating that many employees are happy to return to working in the office at least some of the time, so long as their new demands are met.* Businesses that want to create thriving workspaces that provide for the breadth of their employees needs should therefore consider creating a blended strategy. Simon French, Workplace & Design Director at GSK says that “this should include a third-space to enable ‘local working’, as well as a ‘Mothership’ headquarter office in the city.” This ‘Mothership’ space would be designed to facilitate training and collaboration, acting as a HQ where both employees and the brand can express their identity.

BEHAVIOUR BASED WORKING

Simon also foresees a move to a ‘behaviour-based working’ model, where workplace design will be driven by employee activity, as opposed to by architects and designers who don’t understand how the space will be used on a day-to-day basis. In these workspaces, the use of desks will be minimised, and replaced instead with multi-function spaces that offer employees a variety of choices in the way they work, such as breakout spaces for team meetings or individual hot desks for focused work.

BRANDED HOMES

Founder and Executive Creative Director at Freestate, Adam Scott, believes that businesses will need to find a way to tempt employees into the office and away from their home and third spaces.

To achieve this, the workplace will start to transform into a 'branded home' – which could look like a corporate campus with curated programmes that deliver collaborative and engaging employee experiences through enhanced amenities and multifunctional spaces.



“

PERKINS + WILL'S SURVEY FOUND THAT PEOPLE WORK MORE EFFECTIVELY AT HOME FOR INDIVIDUAL WORK, BUT THEY ARE MISSING THE COMMUNITY ASPECT AND THE SENSE OF BELONGING YOU GET WITH THE WORKPLACE.

**Linzi Cassels,
Principle and Design Director,
Perkins + Will**



Some industry-leaders have already created such spaces, like AirBnB, who have a unique area of their office known as 'Belong Anywhere'. Instead of dedicated spaces, their employees have landing stations to charge computers and lock up their belongings. This gives workers the freedom to find the place throughout the office "city" where they work best for each task, whether it's a quiet library setting, a busier area that feels like an airport, or a large kitchen table for group meetings.¹⁶ This has not only given employees more autonomy, but it's also a fantastic way to bring the brand proposition to life in the workplace.

THE OFFICE PLAYBOOK

As the function of the office changes, Scott argues that businesses will need a playbook to make sure the right tools are set up for the activity that needs to take place – no matter where they are. Much like the theatre has backstage services, the workplace will need the right choreography behind the scenes to ensure that the only concern an employee has when they walk into the room is their work.

A playbook like this could help employers to find the right balance between individual and collaborative spaces – a factor that Oliver Baxter of Herman Miller believes is key to success – **“There is overwhelming evidence to suggest that the workplace needs a balance between individual workspace and collaborative space.”**

When we spoke to Baxter, he also highlighted the importance of remembering The Leesman Index who are the leaders of workplace effectiveness and employee experience, who state that ‘Obstructive’

“

FOCUS ON THE CHOREOGRAPHY AND RITUAL OF FACE-TO-FACE MEETINGS. SPACE SHOULD BE AN ENABLER, NOT THE FOCUS.

**Adam Scott, Founder and
Exec Creative Director, Freestate**

workplaces are those that do not provide individual and collaborative spaces or that exclusively provide collaboration space, whereas the ‘Enablers’ offer individual spaces, with no room for collaboration. ‘Catalyst’ workplaces are those that manage to combine both individual needs with collaboration.

With this in mind, it’s important for businesses to empower their people with social spaces that offer the opportunity to connect with colleagues, whilst also providing quiet and comfortable areas where workers can complete projects autonomously.

“

THERE IS A DANGER IN MAKING EVERY SPACE SOCIAL AS THERE NEEDS TO BE A BALANCE.

**Kursty Groves, Workplace Innovation
Consultant, Shape of Work**

THE TECH-ENABLED WORKSPACE

As businesses increasingly adopt technology tools to power their workforce, Baxter believes that we may see the start of AI-enabled decision-making, and with Covid-19 in mind whether we come into the office or not.

“AI will intake variables surrounding the office – such as how busy transport into the office is, or how many meetings are booked in that day, and determine a percentage for how safe it is to go in.”

THE CREATIVE SOCIAL HUB

After speaking to the experts, it seems that the future office will transform into a space that acts as a central hub for all of the business' activities. New technologies will enable greater freedom and flexibility to work away from the office, whilst the space itself will facilitate independent work, collaboration and connection between employees. Of those we surveyed, many respondents agree with the idea that the future office space should be for centralised socialising and creative thinking...



19% of those surveyed see the workspace becoming a space for centralised socialising and creative thinking.* (Figure 3)

However, the results were fairly divided...



18% believe the office will become a mixed-space building that is utilised for multiple purposes both day and evening for the whole community.*



18% believe the office will become a 'cubicalised' environment where multiple meetings and catch-ups can take place simultaneously.*



16% think they'll be using 'third spaces' where team hubs can meet locally to where they live, away from the main HQ office.*

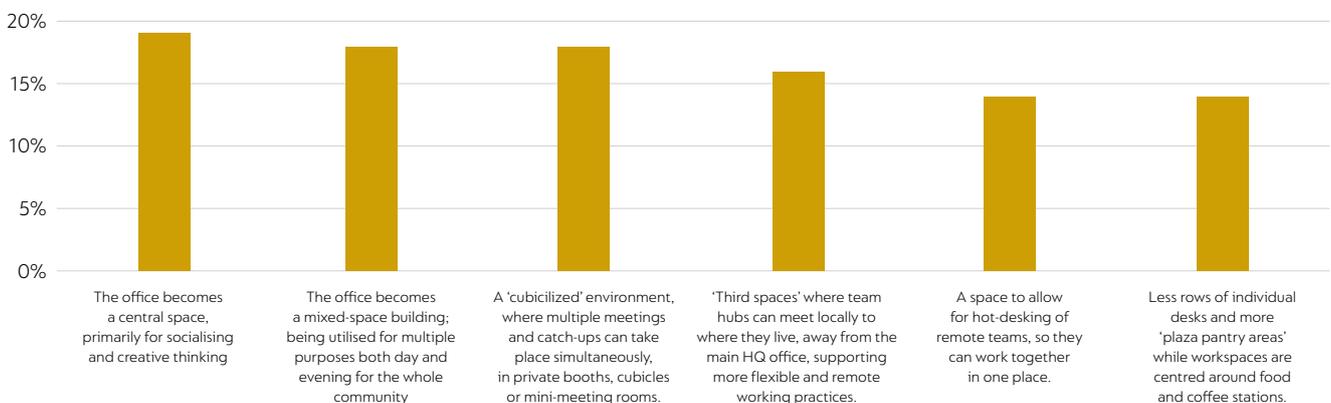


14% envision an environment with less rows of individual desks and more 'plaza pantry areas' where workspaces are centred around food and coffee stations.*



14% see it as a space that will enable remote teams to hot-desk together.*

Figure 3: How do you see the future of the office environment evolve post-Covid?



While this highlights that there is no one size fits all, we can get a good indication of the spaces likely to be utilised when we review those of different business sizes as...

39% of medium sized organisations believe that the office space will become a hub to facilitate meetings, whilst 34% of enterprise businesses see themselves working from 'third spaces'.*

This is most likely due to the fact that enterprise organisations have an increased need for collaboration away from the office given their greater number of employees and teams.



Whilst our findings show there is no obvious 'one size' fits all solution for future office spaces, there are some clear trends we can take away...

1

As employees become more exposed to flexible working and technology transforms the way we work, there is less need for the office, and so the purpose of this space is set to change.

2

There is a greater demand for co-working spaces with an increased expectation for premium food and drink, quality technology, collaborative meeting rooms and all-around cleanliness.

3

Many businesses are likely to utilise a 'blended strategy', where the office will become a central hub that enables employees to work both independently or collaborate and connect, whilst the majority of projects will be completed either remotely or in a third space.

SECTION 4: THE FOCUS ON HEALTH AND WELLBEING



As we look towards the long-term future, it's clear from our research, surveys and interviews that office spaces will need to be inclusive, with a new focus on employee health and wellbeing.

When we spoke with Simon French, Workplace & Design Director at GSK, he highlighted that in the wake of the pandemic, this is pivotal:

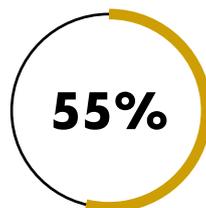
“

HEALTH ANXIETY IS NOW A TOP 3 CONSIDERATION

Whether your employees are working remotely, in the office, in a third-space, or a combination of all three, creating a hygienic, safe and comfortable environment will be key to employee engagement, retention and productivity...



Data from the Society for Human Resources Management show the No. 1 employee benefit people want most is health care coverage.¹⁷



55% of employees said health and wellness activities would be a nice to have as a part of their remote working package. In addition, **78% of those surveyed** are likely or very likely to be more attracted to a company based on the quality of their remote working package.*

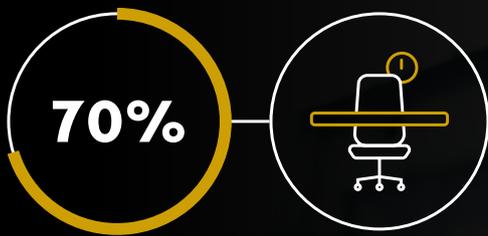


Employees could gain almost a day a week in terms of productivity through a focus on wellbeing, according to Richard Holmes, managing partner at The Working Health Company.¹⁸

THE WELLNESS-CENTRIC OFFICE

So, how does health and wellness translate to office design? Well, there are a number of innovative solutions that employers are utilising to create spaces that maximise wellbeing. For example, workplace design company ROOM partnered with the

meditation app Calm in October 2019 to create a meditation booth for office use,¹⁹ giving their people the opportunity to engage in daily meditation, which can improve everything from back pain to insomnia, and can even increase attention span.²⁰



70% of employers have improved their physical environments to encourage healthy behaviours.²¹

Other leading organisations have focused on the physical health of their employees. Energy provider Chesapeake Energy have provided their team members with a 72,000 square foot fitness centre which includes an Olympic-sized swimming pool, a rock climbing wall, and access to personal trainers, whilst social media giant Facebook offer a bike-sharing programme for team members to cycle to places around campus rather than driving.²²



THE REMOTE WORKING PACKAGE

Given many employees are now working remotely, employers will need to reconsider their offering to ensure their workforce are getting what they need and want – particularly given that 78% of employees are likely or very likely to be more attracted to a company based on the quality of their remote working package.

With this in mind, we asked our survey participants what they would need and want as a part of a remote working package. It was quickly highlighted that there are a series of factors that employee's 'need' to do their job and then there are a series of 'wants' to help them feel happier in their role. Here's what we found out...

What employees need...



53% expect new technology, hardware and internet connections.*



51% expect online webinar and training programmes.*



48% expect a desk set up such as ergonomic chairs and standing desks.*

What employees want...



55% say health & wellness activities would be nice to have.*

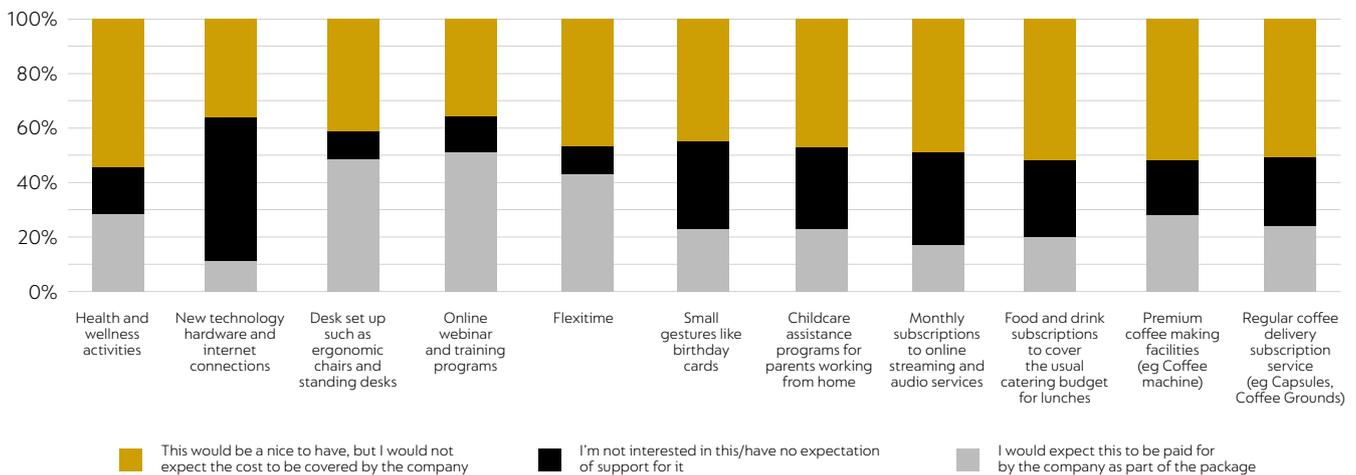


52% say food and drink subscriptions would be nice to have.*



52% say premium coffee solutions would be a nice to have.*

Figure 4: In the future, if you were offered a 'Remote Working Package' in addition to any current benefits you receive, what would be your expectations?



With the above in mind, employers will need to ensure their remote employee benefits package offers a variety of solutions to cater to the wants and needs of their people. For the majority of employees, the right technology and tools will be a key expectation, and employers will need to factor this into their budget.

When it comes to both online training programmes and health and wellness initiatives, employers will need to consider utilising the latest digital training programmes, wellness apps and EAP platforms to ensure their employees still have the opportunities and support they need whilst working remotely.

THE IMPORTANCE OF QUALITY FOOD AND DRINKS

As we've already established, hospitality is a key factor in creating attractive workspaces for employees, and this includes the provision of high-quality food and drinks. In fact, research shows that collaboration is more effective in kitchen and dining spaces where food and coffee play a role. This may be because these spaces are more conducive to informal, collaborative chats. **A recent study even found that the stress levels of employees collaborating in a kitchen space was reduced by 7%, whilst trust was significantly increased between peers.**²³

WHAT ABOUT COFFEE?

Given coffee is an everyday staple for many workers, it's not surprising that it also plays a key part in the wellbeing of workers. In fact, our survey found that...



86%

86% of employees agree that they feel more productive at work following a coffee break.*



84%

84% agree that coffee breaks give them a way to socialise with peers.*



84%

84% feel that a coffee break helps them to relax and recover from stressful situations.*



60%

Over 60% agree that capsule coffee machines are more hygienic and are easier to clean than other options available.*

PREMIUM COFFEE IS A BIG PLUS

As coffee connoisseurs, we wanted to find out if employees would be interested in receiving premium coffee at home as an employee benefit. The response was a resounding yes – with 80% of employees answering in the affirmative. For those who are expecting to work from home more than before, this increased to 85%.*

SO, HOW WOULD EMPLOYEES LIKE TO ACCESS THIS PERK?

Well, 40% said that they would prefer to participate through a membership, where they would receive a discounted rate for a particular coffee supplier for machine and capsules.* We also found that workers in senior roles would be happy to participate with the scheme running as a taxable benefit, whilst lower level employees would be more content with receiving this benefit at a discounted rate.

NOW IS THE TIME TO OPTIMISE YOUR WELLBEING STRATEGY

Our research has made it evident that the workforce expects more from their employer when it comes to their health and wellbeing. Businesses looking to maximise the wellness of their people in the office environment should make sure they incorporate employee-centric design that supports workers emotionally, physically and emotionally, and should also consider offering quality snacks and coffee in the office. When it comes to the remote workforce, businesses must make sure that they are meeting employees basic needs, whilst also offering a wide variety of at-home benefits, including health and wellness support, as well as premium coffee.

SECTION 5: THE EVER-GROWING IMPORTANCE OF SUSTAINABILITY



One of the key positives that can be taken away from the UK's lockdown was the impact it had on the environment, as toxic fumes fell to their lowest level since the 1950s, wildflowers were anticipated to bloom in record numbers and wildlife began returning to urban areas.²⁴

As many organisations transition to new ways of working, this offers the perfect opportunity to implement greener measures in the workplace – and this is something that the workforce is eager to see from their employers...



19% of businesses agree that attracting and retaining the best people for their brand is a motivator for implementing sustainable practices.²⁵



Over 35% of total respondents, and over 40% of Millennials, have committed more time and effort to a company because they were happy with its sustainability agenda.²⁶

THE RISE OF SINGLE-USE PLASTICS

Over the lockdown period, many businesses have been using single-use plastics for food and drinks in an effort to reduce the risk of infection. However, while a temporary measure to reduce the risk of infection, businesses should be conscious about sustaining this for the long-term. Studies have found that single-use plastics are a climate-change hazard. In fact, it is expected that by 2050, plastic could be responsible for up to 13% of the total “carbon budget”, which is equivalent to 615 coal-fired power plants.²⁷

The UK throw away around 295 billion pieces of plastic a year, many of which is single-use.²⁸



To combat this, businesses will need to implement greener strategies across their business – and recycling is the first place to start...

REFOCUS ON RECYCLING

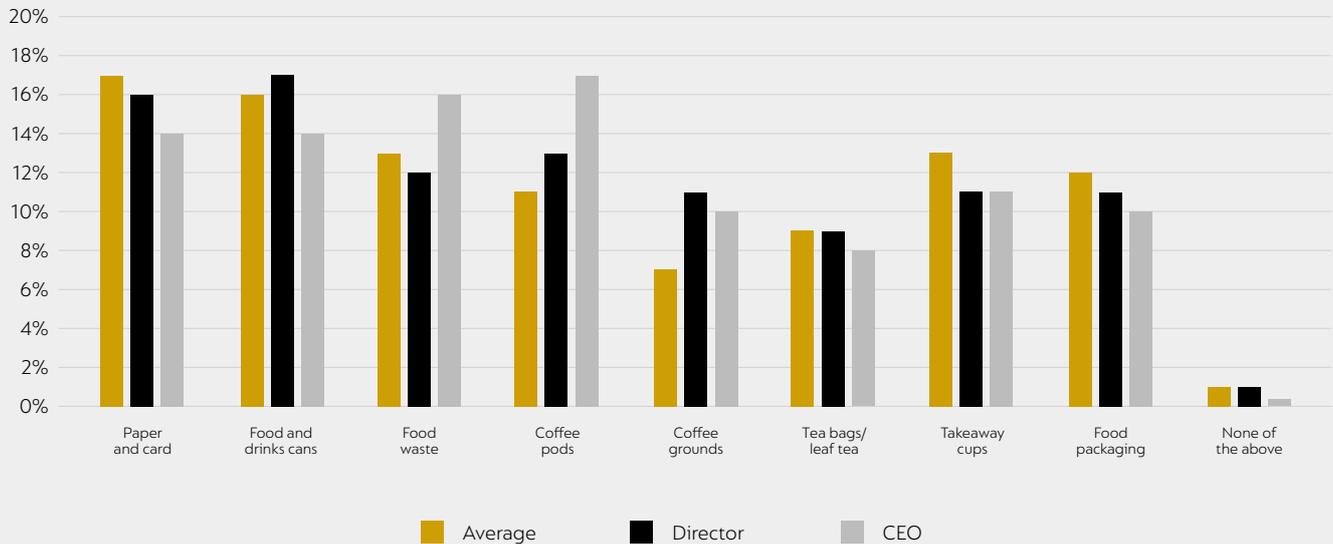


Many individuals see recycling a small contribution to sustainability which can have a large impact. In fact Veolia found that **66% of people have found it has become easier to recycle in the last 5 years and 91% agreed it is 'worth it' in terms of time and energy output.**²⁹ And when it comes to waste disposal, it seems workers expect a lot from their employers...

In fact, our survey found 99% of employees have an expectation for their employers to have waste options available for all waste types.*

However, our survey found this expectation is greater for those in senior positions, this may be due to the fact business sustainability is more likely to be on their radar. Overall this is greatest at director and CXO level. (Figure 5)

Figure 5:
Now that a higher volume of single-use plastics and packaging is being used for food and beverage consumption post-Covid, which of the following should your employer have an active recycling plan/ facility for?



Across the board, it seems employees were slightly less concerned with the broader spectrum of waste disposal, and traditional waste types took precedence. This indicates a need for businesses and their employees to develop a deeper understanding of the positive impact of recycling as much waste as possible.

They should also consider new and alternative waste options that may be available on their journey to becoming a sustainable business.

SUSTAINABLE SPACES, PRACTISES AND POLICIES

There are many ways that businesses can begin adopting more sustainable practices – from small but significant changes such as switching out all light bulbs to LEDs and utilising new recycling programmes, to completely redesigning the office with improved sustainability as the key goal.

In fact, an industry leader in the Netherlands has recently built their office with 165,312 screws so it can be easily disassembled and reused – a process that maximises the circularity of materials and reduces the company’s waste.³⁰

patagonia®

Another option businesses can adopt is to build sustainability into their corporate culture. That’s exactly what leading activewear brand Patagonia did – as the retailer’s corporate philosophy is

“100% FOR THE PLANET”,

which demonstrates their commitment to both their people and their customers.

The brand has since built repair centres around the world to increase the longevity of their products and lower their carbon footprint.³¹



OPTIMISING YOUR WORKSPACE FOR THE FUTURE

Covid-19 is transforming the way we work from employee expectations to the structure, layout and design of the workspace. Here's a summary of our findings which we can anticipate will shape the future of the office.

HOW THE WORKPLACE IS CHANGING

Remote working is here to stay –

49% of businesses expect to spend more time working from home than before.

The office remains important for collaboration –

Whilst 30% of employees want to work from home, 35% are happy to return to the workplace if the conditions are right...

“People work more effectively at home for individual work, but they are missing the community aspect and the sense of belonging you get with the workplace.”

Linzi Cassels, Principle and Design Director, Perkins + Will

The office will need to adapt to attract employees back –

The future office is seen as a space for centralised socialising and creative thinking. For those in inner-city and in suburbs, collaborative spaces will be more important, while those in rural areas will see a greater need for 'workspaces centred around food and coffee', and third spaces.

Health and wellbeing are high on the agenda –

“Health anxiety is now a top 3 consideration.”

Simon French, Workplace & Design Director, GSK.

And so are sustainability and recycling –

Over 70% of people surveyed are more likely to work for a company that has a strong green footprint, and employees expect their employers to have waste options in place for all waste types.³²

LIVING UP TO YOUR EMPLOYEE'S EXPECTATIONS



Businesses need to re-think their employee benefits -

80% of employees are interested in premium coffee solutions as a part of a work from home package.*



Offering quality coffee is key for employees -

86% of employees feel that they are more productive at work following a coffee break and 84% agree that coffee breaks give them a way to socialise with peers. Not only that but 84% feel that a coffee break helps them to relax and recover from a stressful situation.*



And when it comes to coffee, capsules are cleaner -

Over 60% agree that capsule coffee machines are more hygienic and are easier to clean than other options available.*

EMPOWER YOUR PEOPLE NO MATTER WHERE THEY WORK

At **Nespresso**® Professional, we want to help your business adapt to the rapidly changing workspace. That's why we offer a range of innovative capsule coffee machines for office and home working. Our single-use capsules are 100% recyclable and our machine utilise only the amount of water and energy required to create a quality cup of coffee.

As a future-focused organisation, we're committed to sustainability. Developed together with the Rainforest Alliance, our AAA Sustainable Quality™ Program has created favourable conditions for over 110,000 farmer partners, delivering...



22.6%
better social
conditions



52.1%
better
environmental
conditions



41%
better economic
conditions³³



1
Order your
recycling bag
by calling
0800 442 442



2
Fill the bag
with your used
capsules



3
Book for next
day collection
at no cost

Each **Nespresso**® Professional coffee capsule is processed at our local recycling facilities where the aluminium is recycled and coffee grounds are composted.

And if you or your employee's have embraced home working and recently implemented a **Nespresso**® machine at home, you can:

- **Drop off used capsules at all Nespresso® boutiques.**
- **Drop off used capsules at over 7,000 CollectPlus locations**
- **Or arrange a complimentary collection service from your home**



To discover how we can help
your business create a workspace
of the future, simply contact your
sales representative, or call

0808 100 8844

to talk to one of our team, or

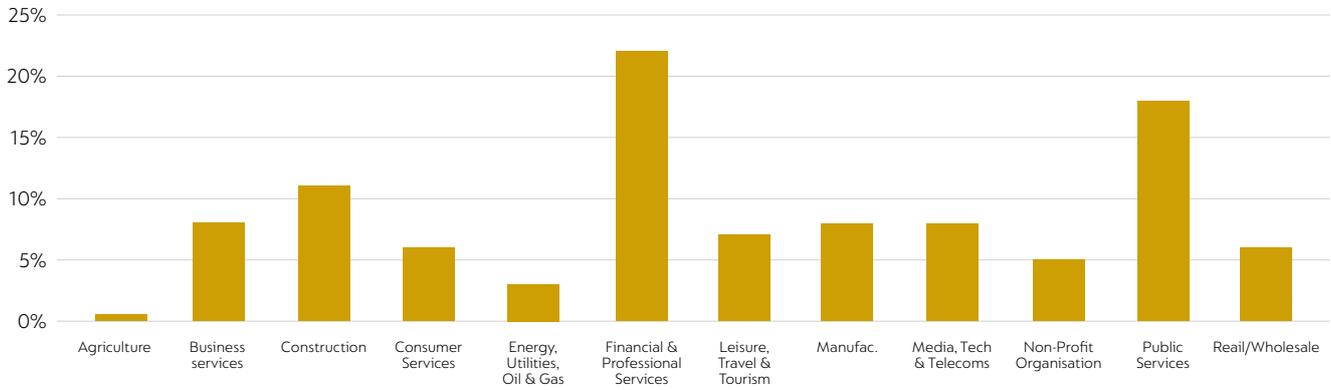
VISIT OUR WEBSITE

to find out more.

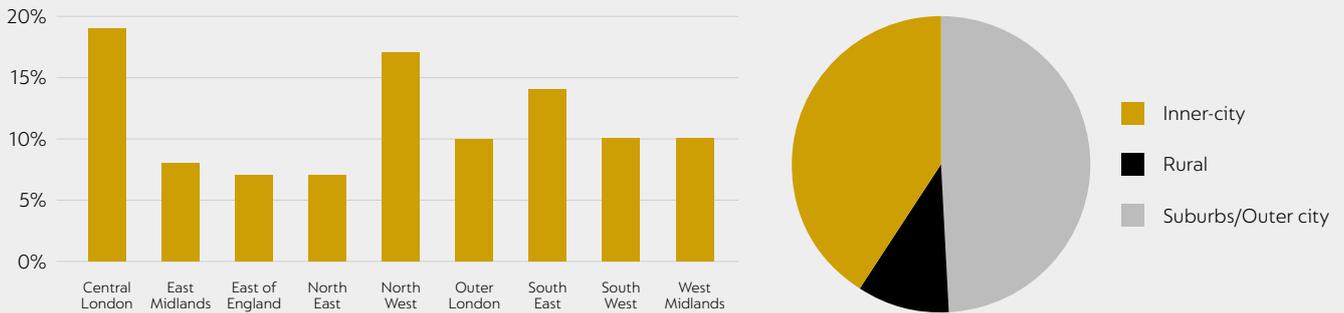
APPENDIX - All about our Audience

*These statistics were taken from a survey conducted by **Nespresso Professional**® as part of the research for this report. Please see below for the breakdown of the audience that were surveyed to gather these results.

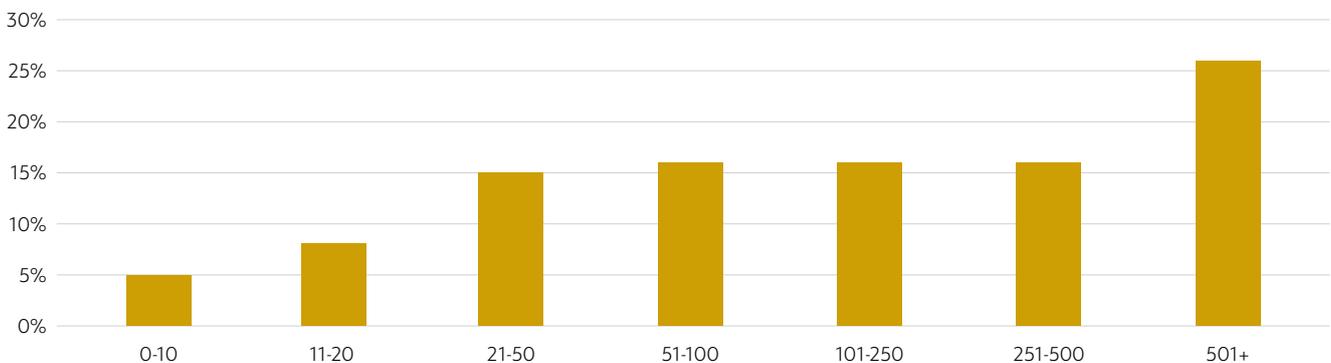
Appendix 1: How would you best describe the industry your company operates within?



Appendix 2: When you're in the office, where is your office located in the UK?

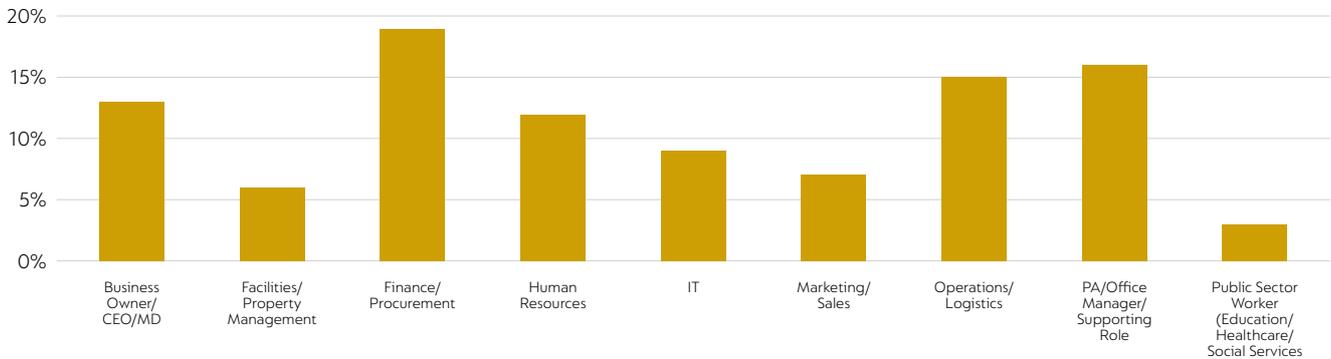


Appendix 3: How many employees are in your organisation?

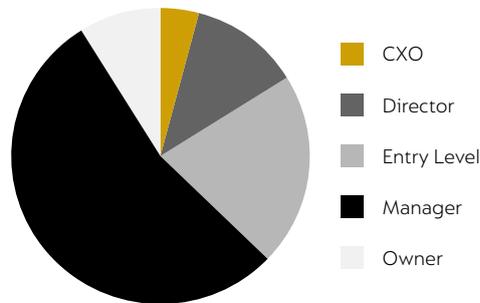


APPENDIX (CONT.)

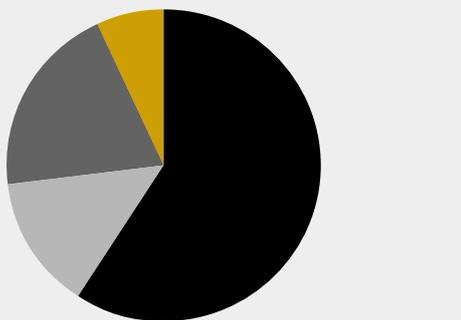
Appendix 4: Please state the job function that most closely represents your role?



Please state the level of seniority that most closely matches yours



Appendix 5: Before Covid-19, which of the following best described your place of work?



- Co-working space (eg We Work)
- Dedicated office building (eg where only our company operates from)
- Home office
- Managed office building

How many days on average per week did you work from home pre-Covid?



- 1-2 days every week
- Full time/5 days a week
- 3-4 days a week
- None
- Ad-hoc days (only when required)

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The Nespresso Professional logo is centered on the page. It features the word "NESPRESSO" in a bold, white, sans-serif font with a registered trademark symbol (®) to its upper right. Below it, the word "PROFESSIONAL" is written in a smaller, all-caps, white, sans-serif font. The background is a dark, swirling pattern of golden-brown liquid, resembling coffee being poured or stirred, which creates a sense of motion and texture.

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PROFESSIONAL