



WORK IS WHERE YOU ARE .

A White Paper from Leitz.

 **LEITZ**[®]



1950's predictions of working 3 days per week with vast amounts of leisure time, seem to have been replaced with 'always on' email exchanges and conference calls at 2am.



Preface

As one of the leading brands in the global office products market, Leitz constantly looks ahead to the workplaces and practices of the future. In 2012, we published the first 'Future of Work' White Paper. We found high levels of interest in the topic, not just from our industry colleagues but also from the wider business community.

This was not totally unexpected as whatever shape the office of the future may take, work will always be with us. Sadly, 1950's predictions of working 3 days per week with vast amounts of leisure time, seem to have been replaced with 'always on' email exchanges and conference calls at 2am, as we struggle with international time-zones when doing business around the world.

Leitz has once again commissioned Andrew Crosthwaite – Founding Partner in Futures House and Planning Director of BLAC Agency in London, UK – to investigate the future of our working world. This year the focus is on 'Working Everywhere'. We were careful not to restrict our working practices to either the office, the home or the now infamous 'third space' that made Starbucks founder Howard Schultz his millions. We have moved on.

A fourth space is certainly available in the cloud and others may follow but, as we discuss, even the simplest concepts have changed significantly.

We have divided our thoughts into six broad areas, beginning with an introduction on the alleged death of the office, or not. We then explore the concept of 'Everywhere Working', some of the drivers of this phenomenon and the now ubiquitous nature of work. Following that, we look at the 'old' office and examine the problems we have created for ourselves before touching on the first hints of solutions.

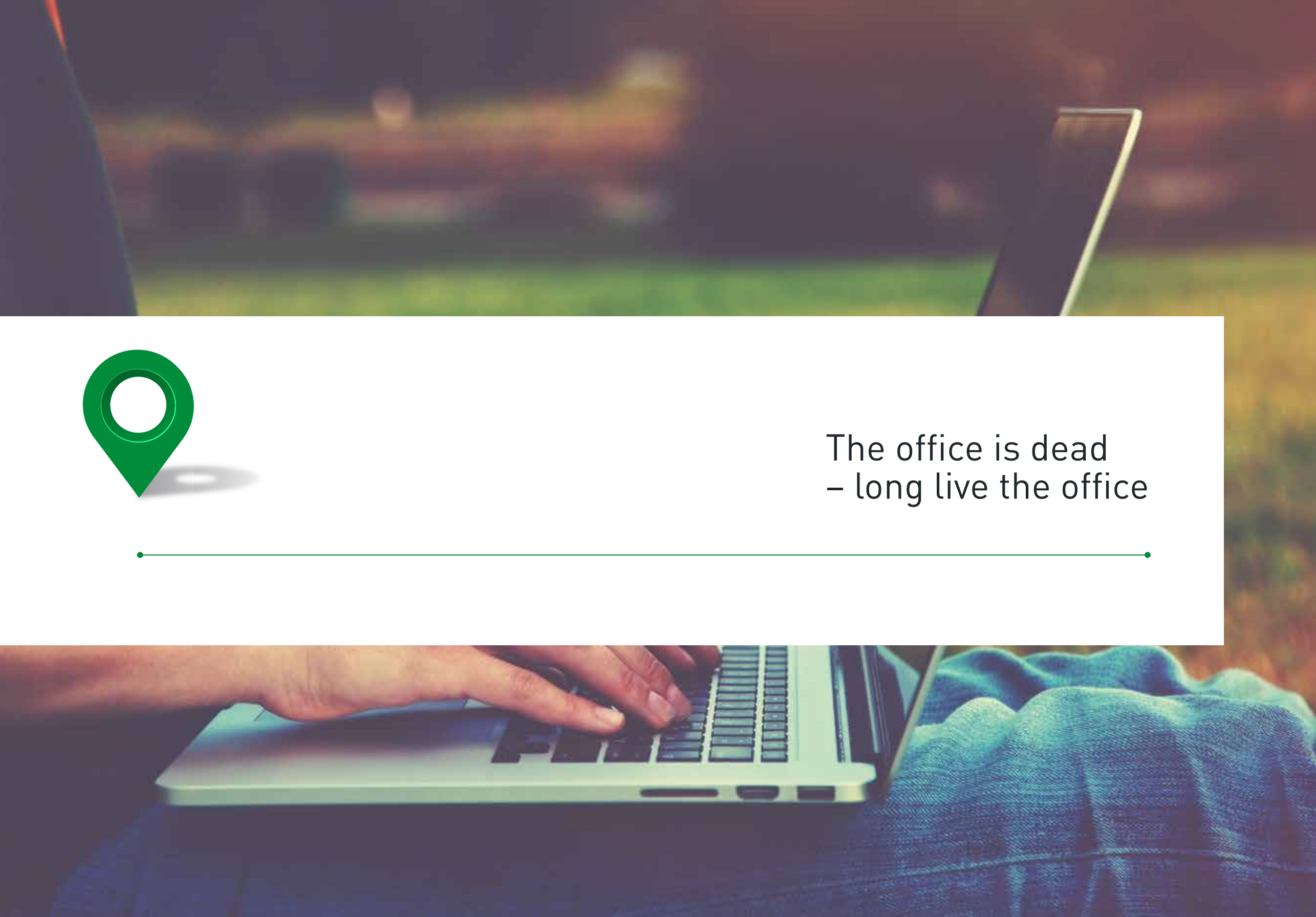
Next, we examine the 'Everywhere Worker'; the benefits they enjoy and also a new set of challenges. Moving into the home, we take a look at the huge variances that pass for home-working now; from kitchen tables and sofas to separate offices. Finally, we look at some of the tools an 'Everywhere Worker' will need to survive in this 'Brave New World of Work'

As in previous years, all of this work is based on extensive research including an exclusive survey of 800 knowledge workers in four European countries (Germany, France, Italy and the United Kingdom). The conclusions, whilst almost certainly not perfect, are evidence-based and represent the views of a robust sample, on work today and possibly tomorrow.

Arild Olsen
SVP Marketing, R&D and Innovation
Esselte Group
Stuttgart, Germany



The office is dead
– long live the office





The office of the future

If you Google 'the office of the future', you will learn that the office as we know it will be dead in a few years. The reality is that most work is still carried out in a central location that, for the sake of simplicity, we call 'an office'.

What will develop is a richer work ecosystem, with more choice, more flexibility and a modular, rather than fixed, approach to working and where we do it.

While much of this paper is about 'Everywhere Working', we recognise that for the majority of people, a central office will remain as a base, or indeed where they do most of their work in the short to medium term.

What will develop is a richer work ecosystem, with more choice, more flexibility and a modular, rather than fixed, approach to working and where we do it.

As part of this report, Leitz carried out research among 800 workers across 4 countries – France, Germany, Italy and the UK – to gain insight into their attitudes and behaviour.

Of this sample, over 1/2 reported that they do 80% or more of their work within their company's office, and nearly 1/4 do all of their work there.

This mirrors findings from *The European Foundation for the Improvement of Living and Working Conditions*, which showed that just under 70% of males and nearly 90% of female employees cite their business premises as their main place of work.

Against this background, it isn't surprising that research carried out by *Dell* in 2014, under the title '*The Evolving Workforce*', found that over 60% of European office workers believe that central offices will continue to exist in their lifetime. This number rises to 73% for Germany.

All this is likely to change over time and we will begin to see greater diversity in the workplace. Just as most of us are multi-media in our entertainment habits – we still watch lots of TV, but also now consume a great deal of information from online media – so we will become multi-locational in the way we work.

In the future, we can anticipate a bifurcation; a significant number of people remaining office based while others will be splitting their time across a range of different places.

This latter type of behaviour was identified in *Forrester's* 2013 survey 'Workforce Adoption Trends' as 'anytime, anywhere information workers'. The survey classified 29% of the global workforce in this way.

Meanwhile, *Citrix's* 'Workplace of the Future' report polled 1,900 senior IT employees worldwide and predicted that by 2020, 89% of companies would offer mobile working, with people working from various semi-permanent locations including their home (64%), project sites (60%) and customer or partner premises (50%).

Infrastructure requirements, worker attitudes, company cultures, not to mention binding long-term leases, mean that the move towards more decentralised work will be gradual. Some industries and job functions will be more susceptible to it and more adaptive than others.

It is unlikely that workers at the CIA's central office in Langley, Virginia, would be encouraged to take their work home with them. Equally, large international companies will continue to require 'super offices' with real, live people in them – which are as much about

expressing scale and importance as a productive work environment. But even there, there will be a change towards a more flexible, decentralised approach.

Workplaces are becoming more adaptive to the needs of work and workers, with the evolving concept that 'work is where you are'. This location neutrality can embrace completely new environments and reconfigure spaces in traditional offices.

Technological advances and connectivity mean that most of us are carrying our work essentials around with us: our phones and tablets, and their power sources and, of course, our brains. Consequently we now have the potential to work in a physically unfettered way that has previously never been possible.

One possible definition for the office of the future is 'anywhere with an Internet connection'. Perhaps the workplace should be characterised by connectivity, rather than a physical space.

In the end, it is up to our employers, our customers, and not least ourselves as to how quickly this change occurs – and how completely.



By being 'always on', there is a danger that how we perform becomes reactive, rather than proactive; that we risk being not just connected to our work, but ruled by it.

📍 Welcome to 'Everywhere Working'

Work, as never before, is everywhere you want it to be. And sometimes where you don't want it.

In the days before mobile phones became mainstream (we're only talking 25 years ago), a mobile office worker could be un-contactable for an entire day, without raising comment. A vacation was 1 or 2 weeks spent cut off from the world of work.

Technology and changing work cultures mean that work is within arm's reach 24/7.

Most of us have become desensitised to this over time. Younger people have never known anything different.

But by being 'always on', there is a risk that how we perform becomes reactive, rather than proactive; that we risk being not just connected to our work, but ruled by it.

Most changes in any market are as much the result of multiple factors in combination, as they are a single trend or driver. The world of work is no exception.

The nature of work is shifting, perhaps faster than some of us are comfortable with. To some extent this is a generational effect; those of us whose careers predate the digital age will tend to have a different outlook from those who have grown up with the Internet.

Rather than being a linear journey (as our careers used to be), work is perceived as a portfolio of activities, as predicted by Charles Handy over 20 years ago. The author of this paper recently attended a college reunion where many of the attendees reaching retirement had worked for their entire careers not just in the same industry, but for the same employer. In future working environments, this will be not just unusual, but exceptional.

More people are freelancing, serving different organisations. In the USA, the average freelancer is working for three or more employers simultaneously. More work is done on a project basis – short term and with evolving teams. This was also discussed in our previous White Paper, 'Work Smart. Work Mobile'.

Some of these activities lend themselves more to a central office, while others are more efficiently and enjoyably done in different types of locations.

More and more, our work lies beyond the confines of our own organisations as projects are shared with different parts of the business; with customers, suppliers, and even competitors in short term alliances.

Technology is making the above possible. Portability and functionality in equipment and connectivity have been among the principal drivers of 'Everywhere Working'.



Smart work – Smart phone

As everyone knows, smart phone penetration has shown rapid growth across all populations and among the EU5 (France, Germany, Italy, Spain and the UK) ownership stands at over 70%.

Universal Wi-Fi has resulted in the growth of alternative spaces to conduct business.

They are increasingly our first screen of choice and, in a work context, this has implications for how business information is displayed. This is another factor in a more dashboard-style approach to reporting.

For many of us, the mobile phone is becoming not just the preferred, but the only means of communication. The landline phone is now used to denote a less useful, fixed medium, while a 'phone' is something you carry with you.

Wi-Fi is almost universally available. On average, in developed countries there is one Wi-Fi point for every ten people in the population. Attention is now shifting to speed of connectivity.

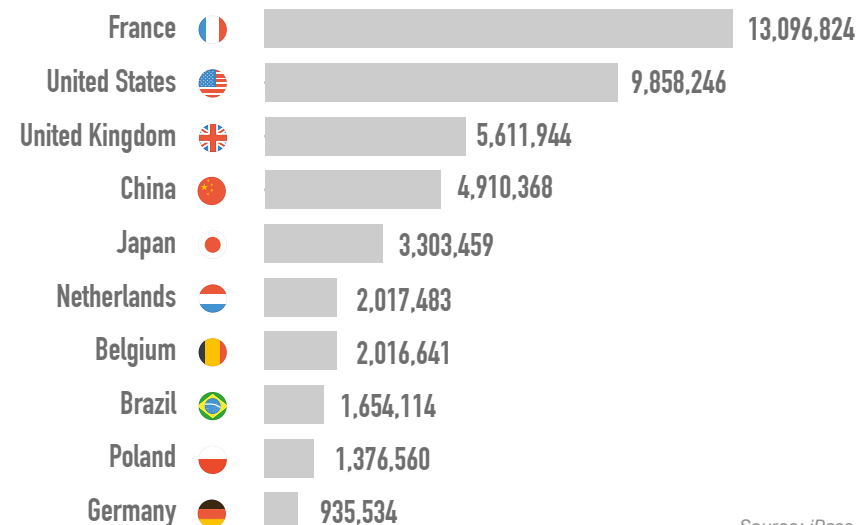
In 2015, research by *Rotten Wi-Fi* produced a global ranking where Lithuania, Croatia and Estonia held the top three spots for the fastest public download speeds.

Hotels which hoped to make up lost landline revenues through Wi-Fi, have had to think again as customers have rebelled against paying. Speed has become a factor here too, with services such as www.hotelwifitest.com allowing guests to rate not just the presence of Wi-Fi, but also its quality.

Universal Wi-Fi has resulted in the growth of alternative spaces to conduct business (serviced offices, coffee shops, motorway stations, hotels, and also the home).

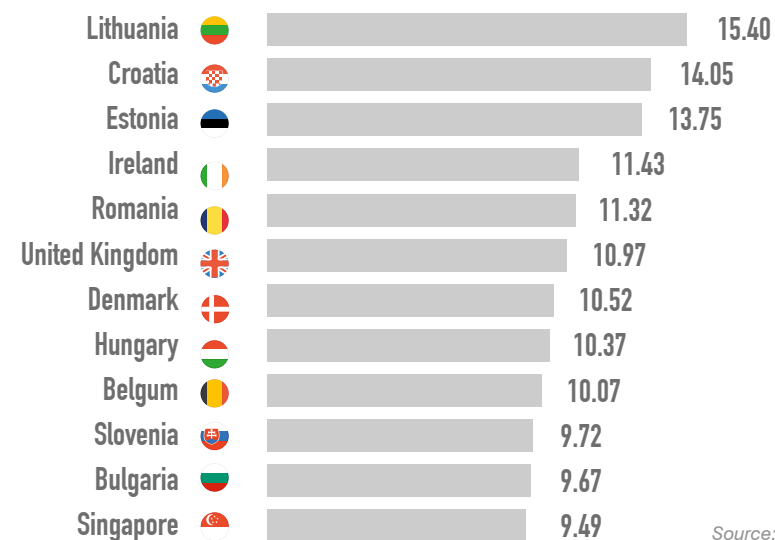
These have positioned themselves as daytime meeting places. In addition, for true location neutrality there's the virtual 'fourth space'; a workspace in the cloud that spans anywhere and everywhere.

Top 10 connected countries (number of Wi-Fi hotspots)



Source: iPass Inc.

Fastest public Wi-Fi download speeds (in Mbps)



Source: Rotten Wi-Fi



An agile attitude

'Agile Working' is becoming a buzz phrase, although its origins actually lie 60 years ago in Deming's approach to regenerating post-war industrial Japan. The demands of an agile business are very different from the ones where people are tied to their central place of work.

We will see how the growth of 'Nomadic Workers', both voluntary and involuntary, as freelance workers with no fixed working location become an essential part of the Agile Workforce.

Like much business terminology, it is easier to talk about than to deliver. *Deloitte*, for example, believe that within the professional services sector, the biggest barrier to agile working is the culture of presenteeism.

By definition, an 'Everywhere Worker' isn't 'here'; for most of the time, he or she is somewhere else. As a result, it is debateable whether presenteeism has any benefits beyond a feel-good factor for management, which finds it hard to loosen the reins, or simply doesn't trust their workforce to do the job without supervision.

As *Philip Tidd of Office Architectural Practice Gensler* recently put it, "Your productivity is not measured by the amount of time you sit behind a thing called a desk. It is what you do. It is about your output"

The most talented, who will also be the most in demand, will want to work on their own terms. Increasingly, for people like this, benefits – ranging from healthcare to paid sabbaticals – are as important, if not more so, than income. How and where they work is part of this.

In 2015, research done among members of the 'Inc 500' (the fastest growing US Private companies) by *The Workforce Consultants* found that, "Key talent will seek out work arrangements that take into consideration the lifestyle they want to live. This includes more flexibility in schedules, an increase in remote work, and concepts such as unlimited time off and unlimited vacation".

Putting aside personal preferences, nothing talks louder than money. Many studies suggest that in a traditional office, the average desk is only occupied for around 50% of the time.

As office costs come under increased scrutiny, companies are looking hard at this high cost, under utilised asset.



Pillars, Roamers, Explorers and Pioneers

People working in different ways will have different requirements and mindsets.

The Leitz research project asked people to self – classify their working style. 53% say they are mainly based at their own desk when they work (Pillars); 27% move around the office a lot (Roamers); 11% make frequent trips outside the office (Explorers) and 8% are rarely in the office at all (Pioneers).

In the world of work this distribution will vary by industry type, and job function within each industry type. There is no magic formula. At a macro level, we can see that nearly half of the workforce are leading nomadic or semi-nomadic lifestyles, even if they maintain a central base.

A key question is the extent to which companies recognise this and how this is reflected in their space-planning and the virtual networks that need to be in place to ensure that even Pioneers don't become isolated – or indeed unaccountable.

An office with fewer people at any one time can be smaller, more flexible, more efficient, and provide a better return on real estate investment. The only problem arises when all the Explorers and Pioneers – not to mention freelancers and mainly home based workers – decide to turn up at the same time.

Changing worker profiles and outlooks have also made a contribution to the growth of the 'Everywhere Working' concept.

The increase in part-time and contract workers will serve to dilute the traditional 9-5 single location model in the future. Self-employment covers a wide span, from IT coders to cleaners, with significant contrasts by country across Europe.

The Institute for Public Policy Research notes that over 60% of the German self-employed and over 1/2 of their British counterparts work in high-skill occupations. Southern and Eastern economies tend to have higher proportions of self-employed workers engaged in low and mid-skill occupations.

Pillars, Roamers, Explorers and Pioneers

We will see how the growth of 'Nomadic Workers', both voluntary and involuntary, as freelance workers with no fixed working location have become an essential part of the Agile Workforce.

Some commentators see younger workers coming into the marketplace as more demanding, questioning, self-sufficient, wanting to do things on their own terms.

Different surveys have different results, but the broad trend is consistent; 25% of EU workers are classed as 'E-Nomads' by the *European Foundation for the Improvement of Living and Working Conditions*.

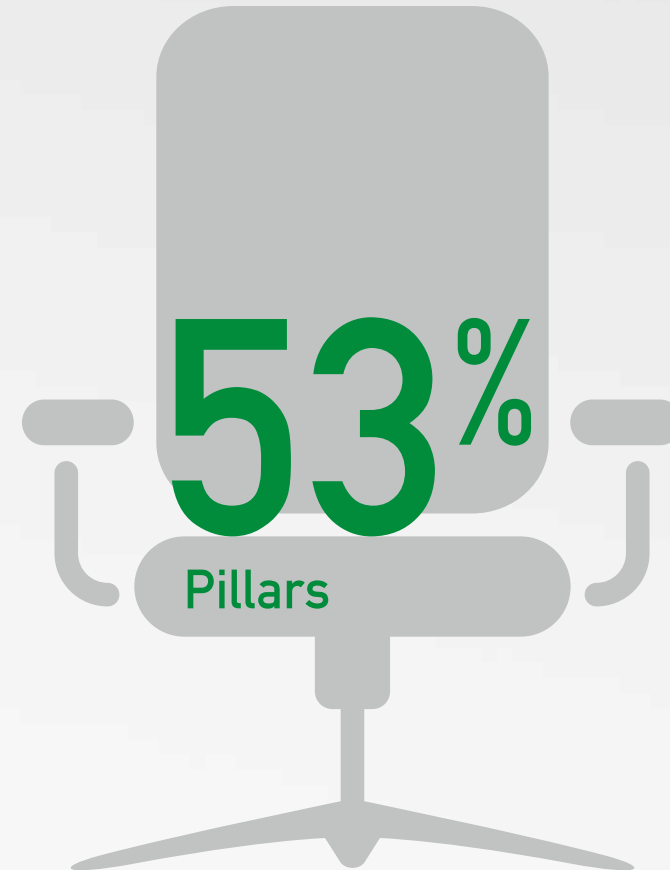
As with everything, beware of averages – the highest concentration of 'E-Nomads' are in Finland, Sweden and Denmark (45%), compared with less than 15 % in Italy and Poland.

When it comes to life stage, the attitudes of current (X,Y) and future new (Z) generations coming into the workforce will have a profound effect.

Views on younger generations and their impact on workplace location vary; some commentators see younger workers coming into the marketplace as more demanding, questioning, self-sufficient, wanting to do things on their own terms.

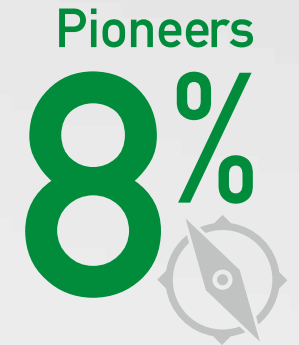
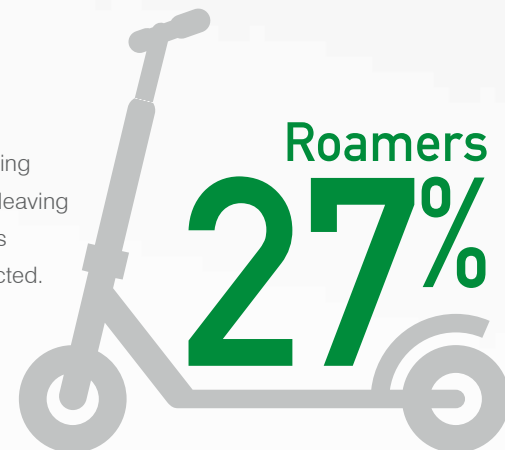
However, every trend has a counter trend. Others believe there is post-financial crisis conservatism; new generation workers feel happy or lucky to have a job and desire to fit in and contribute, rather than disrupt. In short, they play the corporate game just as their predecessors did.

The reality is that, depending on culture and prevailing economic conditions, both will co-exist.

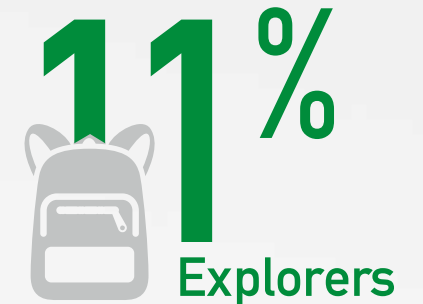


When Pillars are at work they are at their desks. From Receptionists to PA's and call centre workers, they are often at the heart of the operation.

That person always running from meeting to meeting – that's a Roamer. Seldom leaving the building or campus they are always on the move, keeping the team connected.



The star salesman may only appear once a quarter and some people won't recognise them. Nonetheless, Pioneers are out there boldly going to the new frontiers of your business.



Office-based but frequently heading out, Explorers tend to be more senior, visiting clients, suppliers or investors but still spending a significant time in the office.



Office space is becoming smaller. Over the last 10 years, in New York City for example, space per employee has fallen by 25% with an average allocation of just over 12m² per employee.



The traditional office – what went wrong?

Many of us have spent more time in our offices than we have at home. Most of us spend more time working than sleeping.

Over the course of the 20th Century, efficiency theorists and organisational psychologists have influenced the design and layout of the office environment.

The sheer cost of refurbishment or moving premises is something that fills management with dread. However, when we look around our office base, if we have one, can we honestly say that it is a place where we look forward to coming to every day?

'Everywhere Working' means that what we do, and where we do it are now independent. We can take a long hard look at what might have gone wrong with the office concept and what the potential remedies are.

One key issue is where offices actually are located. Fixed offices in large urban areas are often remote from where people live. Equally, the relocation of offices to outer suburbs and business parks cause similar accessibility problems, with parking being an issue for both.

Office space is becoming smaller. Over the last 10 years, in New York City for example, space per employee has fallen by 25% with an average allocation of just over 12m² per employee.

In part, this is a reaction to the more nomadic habits of employees. But this is scant consolation when you want space to think. Research by *Kim* and *de Dear* at *Sydney University* suggests that adequate space is the single most important factor in how much we enjoy our offices.

At the moment, most people in the Leitz's European research sample are happy with the current space allocation in their main offices. Only 25% rate their space as excellent, a further 60% rate it as good.

Stressful space

The main developments in office configurations over the last 40 years or so (cubicles and open plan) both have drawbacks.

Leitz asked their 800 person sample what their preferred office space would look like. 25% work in an enclosed single person office – a relatively senior profile – but over 50% would have an enclosed office as their preferred environment.

Cubicles depersonalise, are associated with battery farming and have distracting noise issues (mainly that you don't know where it's coming from) adding to the confusion.

Open plan has the benefits of creating an esprit des corps (in theory), as well as giving management a visual audit of who is doing what. The most widely reported disadvantages are noise, lack of privacy, and the consequences of shared light and heat.

Organisational psychologist *Matthew Davis* found that decreased levels of concentration and increased incidence of stress are far more common in open layout offices. At the same time, the *Queensland University of Technology* claims that 90% of studies show open plan associated with higher levels of stress and blood pressure.

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In both cubicles and open plan, it's not surprising that people are increasingly retreating into their own internal space created by headphones.

Whilst only 25% of our sample said this is acceptable where they work, it should be viewed in the context of the rise of millennials in the workplace. For them, headphones are part of an everyday work uniform.

Work isn't working

Given that the main reason for being at work is actually to do work, it is discouraging to see that research in the USA, Europe and Asia by *Ipsos and the Workspace Futures Team of Steelcase* showed that 85% of people find it difficult to concentrate in the office.

Of those surveyed, virtually all said working privately was important to them but only 41% said they could do so. 1/3 had to leave the office to get work completed.

This is in line with findings from *Gallup's State of the Global Workplace*, which found that only 10% of workers around the world are engaged and inspired at work, with 2/3 feeling disengaged and unmotivated.

At the same time, those who spend up to 20% of their time working remotely are the most engaged of all workers surveyed.

No wonder, you might think, that 35% of our Leitz sample would prefer to spend more time working outside the office in the interests of delivering better results.





Designed and built by Space & Solutions



The new office model

The good news for people who spend the majority of their time at a central location is that modern office designers are recognising the shortcomings of the conventional office.

On the one hand, there are larger tech organisations, which use their premises as an extension of their brand, so that the building becomes a medium in its own right. Google, Apple and also Lego are prime examples of this.

Office design in the past was functionally oriented. It was based on; who can fit where, and in the most efficient way. Now a more humanistic approach is evolving. Think of a club, but where the main activity is work.

This doesn't necessarily mean that companies are putting workers first from a position of conscience. They realise that happier workers will be more efficient, less distracted.

They take less time off and are more motivated to actually turn up to work at all. They are also likely to be prouder of where they work and who they work for. All this means they are less likely to defect to a competitor with newer, more user-friendly premises.



Less Dilbert™, more Google

Offices are becoming multi-functional locations, with innovations coming from two principal areas.

On the one hand, there are larger tech organisations, which use their premises as an extension of their brand, so that the building becomes a medium in its own right. Google, Apple and also Lego are prime examples of this.

At the other end of the scale, there is innovation in the use of space from smaller, often creative companies, who are able to take a start-up approach without the burden of existing infrastructure.

A word of caution here; being extreme in approach can be counter-productive. As designer *John Ferrigan* put it, "I'll hear clients say, 'we want to be more like Google'. I tend to challenge them and say, 'Is that really what you want, or do you want to find out how company identity is expressed through physical space?'".

In comparison, with offices designed and fitted 10 years ago or more, you are now more likely to find a modular approach to space with greater variety and purpose in these alternative designs. Design isn't just about environment, it's about mood, behaviours and company brand culture.



Form and function

What we are seeing is a greater use of zoning, so that different areas have layouts, equipment, mood and character to fit different purposes.

More thought is going into internal connectivity, with areas flowing into each other, mirroring the breakdown in departmental silos and the growth in collaborative work practices.

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Intelligent spaces that use light and sound to create a desired ambience, a meeting style or project are also more commonplace. All future offices will have intelligence built in, becoming digitally connected and able to respond to individual mood. In addition, they'll have personalised controls for heating, lighting and air quality.

A recent study in the journal *Nature Climate Change* identified a significant difference between the temperature requirements of men and women. Women prefer the average temperature in the office to be 25°C, compared to 22°C for men. It's important to note however that nearly all temperature controls favour the latter.

Social facilities are often now seen as an important part of the work environment rather than an indulgent extra. The thinking is that break-times and down-times are better spent dining, playing or exercising than staring out of the window (if you have one) or catching up on Facebook (if your employer hasn't blocked it).

Among other benefits, this type of approach to office design and equipment is bringing the amenities associated with remote or home working back into the central workplace, even the ability to tune out and rest.



Photo courtesy of Steelcase Inc.

When Panasonic opened their UK offices in the 1980s, discreet curtains in meeting rooms disguised pull down beds. The problem was that despite the accepted Japanese habit of nodding off during meetings (called *inemuri*, translated as 'sleeping while present'), few people had the courage to use them.

Sleeping pods are still a rare sight in modern offices. Google have predictably had them for years and momentum is gathering, with concepts such as the EnergyPod created by MetroNaps installed in offices by Huffington Post, Cisco and P&G. Prevailing cultural beliefs go against this; is a sleeping worker an efficient worker?

Leitz asked their European sample about acceptable ways of taking a break in their workplace. Over 60% said leaving the premises to get a coffee wasn't an issue, but only 8% said that taking a 20 minute nap would be tolerated. Both would take the same time and, arguably, the nap would be more beneficial - but they send out very different signals.



‘Going to work’ used to imply a destination, rather than an activity. It conjured up a mental picture to others of where you were and what you were doing. Now work is where you are.

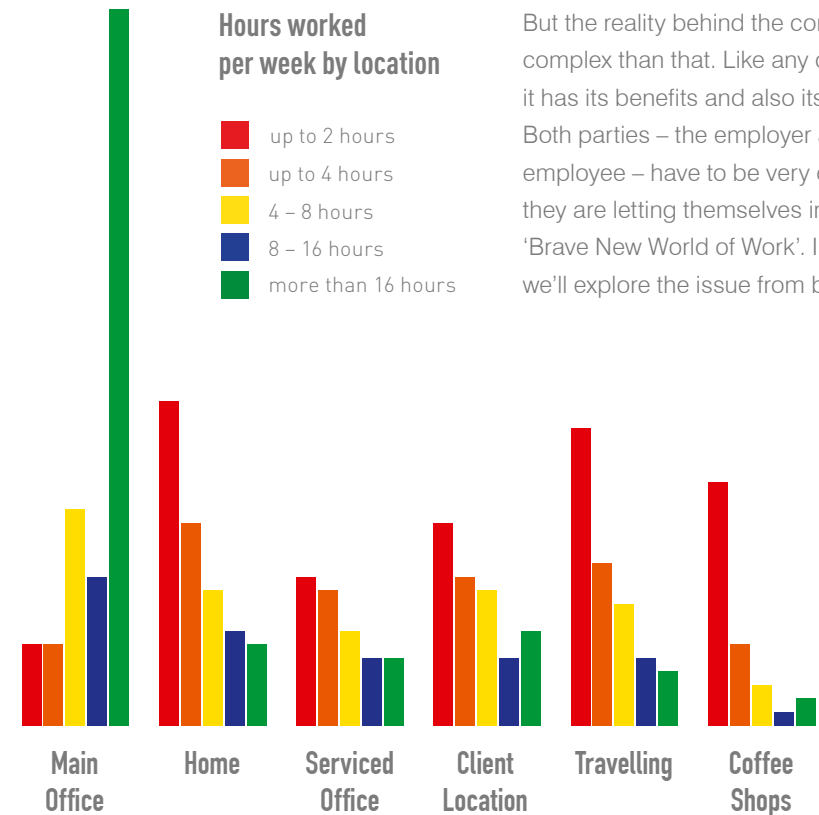
📍 ‘Everywhere Workers’

What would you rather be – an office worker or an ‘Everywhere Worker’? ‘Everywhere Working’ sounds active and dynamic. It suggests a degree of self-sufficiency.

Liberation is at the heart of the promise of Everyday Working. Free to work where you want, where you want. Who wouldn’t want a job like that?

‘Going to work’ used to imply a destination, rather than an activity. It conjured up a mental picture to others of where you were and what you were doing. Now, work is where you are. From low flexibility and geographically tied or fixed, to high flexibility and geographically neutral or freed.

‘Workers of the world, unite! You have nothing to lose but your chains!’ is a quote attributed to *Marx*, but we can be sure he wasn’t referring to remote working when, and if, he said it. Perhaps the modern ‘Everywhere Worker’ mantra would be ‘You have nothing to lose but your Wi-Fi’.



But the reality behind the concept is more complex than that. Like any contract, it has its benefits and also its drawbacks. Both parties – the employer and the employee – have to be very clear what they are letting themselves into, in this ‘Brave New World of Work’. In this section we’ll explore the issue from both sides.



The benefits ...

'Everywhere Working' does bring the possibility of liberation of a different kind. It's a form of empowerment, transferring organisational responsibility to the individual.

It involves doing the job on more personal, often better-informed terms rather than within the command and control environment of an inflexible, fixed office.

There is evidence that, on the whole, workers who don't always go to a central work location are happier than their habitually office-bound equivalents, and suffer less stress.

If travel broadens the mind then so, potentially, does the stimulation of changing and varied locations for thinking and interacting. Writers often employ a change of scenery to stimulate the creative process. From going for a regular swim or walk, to the wholesale relocation to another country.

The average worker will also reap the benefits of more varied surroundings – and not just in aiding their thinking. There is evidence that, on the whole, workers who don't always go to a central work location are happier than their habitually office-bound equivalents, and suffer less stress.

Research published in 2015 by the *University of Montreal's School of Industrial Relations* showed that commuting is associated with higher levels of stress and a more negative attitude to work, with 20 minutes as the tipping point. Those commuting into the city, rather than the suburbs or rural workplaces, suffer at higher levels.

In 2014, a report by the *Office of National Statistics* in the UK showed that, on average, daily commuters have lower life satisfaction, a lower sense that their daily activities are worthwhile, lower levels of happiness, and higher anxiety than non commuters. They also produce pollution as 30% of UK surface emissions are estimated to be caused by travel to and from work



Work from home ... for 20% less?



If, for example, UK workers valued the time they spend getting to work as highly as they value the time they spend at work, then, according to research from global recruiter Randstad, the average commute would have an equivalent value of £5,700. This represents nearly 20% of their average annual salary.

Leitz asked their 800 sample what percentage of their current salary they would be prepared to forego for the benefit of working at home when it suited them. Nearly 50% said they'd be willing to be paid up to 20% less to do this.

Of course, there is also the whole area of work-life balance. 'Everywhere Working' is a broad term. At an extreme it can involve being continually on the move, leading a lonely, nomadic existence with no sense of place. The rise of contract and freelance work is making this more prevalent.

Alternatively, for someone like the average UK or US worker who works from home at least one day a week, there are clear benefits: less travel, time spent in the home environment, contact with the family, and fewer irrelevant interruptions.

According to research done by the *University of California*, the average US office worker is interrupted every 3 minutes, with around half of these 'self-interruptions'. Afterwards they spend 23 minutes recovering focus and momentum.

The reality is that few people in an office have a working day. Instead, they have what *Jason Fried* defined in his *TED Talk* 'Why Work Doesn't Happen at Work' as 'work moments'; short bursts of activity punctuated by regular distractions.



The challenges ...

The lack of a sense of a work base is a major potential issue for people spending part, or all of their time, remote from a central office.

With offices being reconfigured for flexible working, in many workplaces there is a decreased sense of defined territory.

Desks become flat surfaces rather than somewhere with a personal touch or stamp.

For those who work in the office full-time, the image of an 'Everywhere Worker' is often that of someone lounging around, writing emails in their dressing gown or walking the dog rather than focusing on the matter at hand.

Access to more mundane, although still essential items, like staplers, punches, desk trays and filing - don't forget the average office worker still handles 10,000 + units of paper a year - becomes problematic without a sense of place and ownership, and a desk drawer to call your own.

In the Leitz research sample, 81% of respondents report having an assigned space to sit with 19% 'hot desking'. Interestingly, 'hot desking' is the preference of a slightly higher proportion than currently have it, (28%). This still leaves a clear majority wanting their own territory.

Higher up the Maslowian hierarchy of needs from these basics there is also the fear of being disconnected from the social environment of the workplace. This can range from being out of touch with gossip (which is increasingly unwise to put in a work email as many have found to their cost), to being overlooked and forgotten in favour of those who are more continuously present.

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However, there is a different price to be paid, with a tension between flexibility and availability. 'Everywhere Workers' are often seen as 'Anytime Workers'. Their personal lives become even more blurred into work, more 'always on' than their fixed-space-equivalents, who may still be operating at a semblance of 9-5.

One of the biggest challenges for HR and the individuals themselves is switching off. Fatigue becomes an issue. It probably isn't a coincidence that the growth of remote working in the USA has been accompanied by 20% fall in the number of vacation days taken.



The alternatives ...

For the 'Everywhere Worker' a number of options other than the office are emerging. Coffee shops are positioning themselves as surrogate offices; with free Wi-Fi, device-charging facilities, and even business lounges for workers who don't want noise as background to their thinking.

30% of the Leitz sample uses coffee shops as a work base during an average week. 24% spend up to 4 hours there – the equivalent of half of a working day. Dubbed the 'Coffice' by some, the act of working there has been identified in many studies as a productivity booster.

They have different environments from your home or office, which in turn can generate different ideas. Research by the *University of Chicago* showed that ambient noise around 70dB, rather than lower levels of sound is proven to enhance performance and support innovation. Services such as 'Coffitivity' have emerged, imitating the sound of a typical coffee shop so that office and home workers can reproduce that environment and stay focused for longer.

In addition, if your local coffee shop doesn't have fast Wi-Fi, or takes issue with you using more of their electricity than you spend on muffins, there's *coffice.co*. Linked to *Foursquare*, it helps workers find a coffee shop near them with the right facilities and ambience.

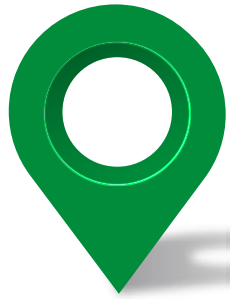
Not surprisingly, coffee shop working is prevalent in smaller companies (less traditionally minded, probably with less space) and more likely to be adopted by younger office workers, possibly on the basis that it's an extension of the working habits they adopted as a student.

We noted the growth of serviced offices in 'Work Smart. Work Mobile'. Nearly 40% of the Leitz European sample use serviced offices in the course of the average week. 5% spend more than 2 working days there.

The most common model is essentially a modern, but traditional office space in a hub location, bland in feel and designed to please most of the people most of the time.

In tune with modern ways of working, this model is diversifying to become more individualised, less homogeneous.

Examples include The Office Group, WeWork (whose valuation doubled to \$10 billion in the first 6 months of 2015 and described by its founder as a 'physical social network'), The Clubhouse, and Second Home, in a segment referred to as "Office as a Service".



The new world
of home working





Home working means ...

According to the old saying, 'Home is where the heart is'. For most of us, it's also where the work is for at least part of the time.

Home working means any number of things – from full time employment off-site, to an agreed number of days a month or week, to the more informal catching up that most of us find ourselves doing in the evening or at the weekends.

In the past, taking work home could mean that you were fiercely ambitious, ceaseless in your desire to perform at your best – or not up to the job, unable to cope with the tasks you were given.

Home working means any number of things – from full time employment off-site, to an agreed number of days a month or week, to the more informal catching up that most of us find ourselves doing in the evening or at the weekends. Using up, in fact, the leisure time that we were promised would be the main benefit of an automated and computerised world.

In this part, we'll explore some of the challenges involved in letting work not just move into, but in some cases dominate, our home lives.

Full-time home working is embraced by only a few. Although over half the businesses registered in the USA are home based, only 2.5% of people describe the home as their primary place of work. Typically, they will be people in repetitive or high-end jobs, where a lot of deep thinking is required.

However, around 50% of workers in developed markets work at home some of the time. This rises to 80% for office workers. This is confirmed by results from *The KPMG Future of Work* survey. The survey showed that just over 1/4 of HR directors and 1/3 of top level executives allow their employees to work at home at least one day a week.

Part of this is down to cost benefits but a more holistic view of work and the employee also plays a role. From saving money to what *Global Workplace Analytics* describes as "A greater emphasis on remote work options as part of a holistic strategy to reduce work-life conflict, attract and retain talent, improve sustainability, and increase employee engagement".

In the 2015 Leitz survey, a reassuringly similar 62% of a sample of European workers said that, in the course of each week, they do part of their work at home. For most, much of this consists of work beyond their contracted hours.

Many studies suggest that those who do part of their work out of the office work longer hours than full-time office employees.

There is a difference between official and unofficial working at home. Most employment contracts stipulate hours to be worked, as well as start and end times (although with flexible working in the ascendancy this will become decreasingly common).

It is worth noting that in September 2015, the *European Court of Justice* ruled that time spent travelling to and from first and last appointments by workers without a fixed office should be regarded as working time. This could mean that many 'Everywhere Workers', for example sales representatives, may now be in breach of EU working time regulations.





How efficient is home working?

In terms of reported behaviour, 75% of the Leitz sample believe they are more productive in the office than the home, although they attribute different types of thinking to different environments; 46% say they are more creative working at home but only 30% feel they can concentrate more.

In this research, a sample of call centre workers who were given the option to spend 4 days working at home and 1 day in the office, showed a higher level of productivity (13%) than the control sample, which remained in the office full time.

This may be due to personal comfort. A 54% majority find the home a more physically comfortable place to work than their office. In the broader world, there is limited empirical evidence to support the case for, or against, home working and efficiency.

A study by *Stanford University* on a Chinese travel agent, *Ctrip*, is the most frequently quoted example. If you Google 'working from home' and 'benefits', 3 of the top 4 links will cite this research, so there is clearly a need for more studies on this topic.

In this research, a sample of call centre workers who were given the option to spend 4 days working at home and 1 day in the office, showed a higher level of productivity (13%) than the control sample, which remained in the office full time.

The improvement was attributed to a combination of: reductions in breaks, time off, sick days and relative peace and quiet. Resulting in a greater number of calls taken per minute, the chosen definition of productivity in this case.

As a result, *Ctrip* offered the option of home working to all employees – but 1/2 of the trial sample chose to return to the office full-time, with loneliness and isolation cited as the main reason. It is important to note that this is a single study, in one culture (possibly stereotypically with a higher work ethic than characteristic of the European norm). In addition, it was done in one area of business that requires very little interactivity with other employees and with a self-selecting sample, many of who clearly liked the idea of working at home.

The same article in the *Harvard Business Review* claims that with most jobs "A good rule of thumb is to let employees have one to two days a week at home. It's hugely beneficial to their well-being, helps you attract talent, and lowers attrition". In conclusion, it's probably best for employers and employees to do a little of each.

HOME SWEET HOME

Assuming that you are working at home for part of the time, what advantages will you enjoy?

Microsoft's 'Work without Walls' sampled more than 4,000 information workers in the manufacturing, financial services, retail/hospitality and professional services industries. They identified the following reasons why people like working from home.



Free at last

There is an overlap, but the benefits can be grouped into three main areas:

- **Quality of personal life**
- **Greater efficiency**
- **Less travel cost in time and money.**

The problem is that, while these are all motivating for the employee, only one is of interest to the average employer.

When do we do our best work?

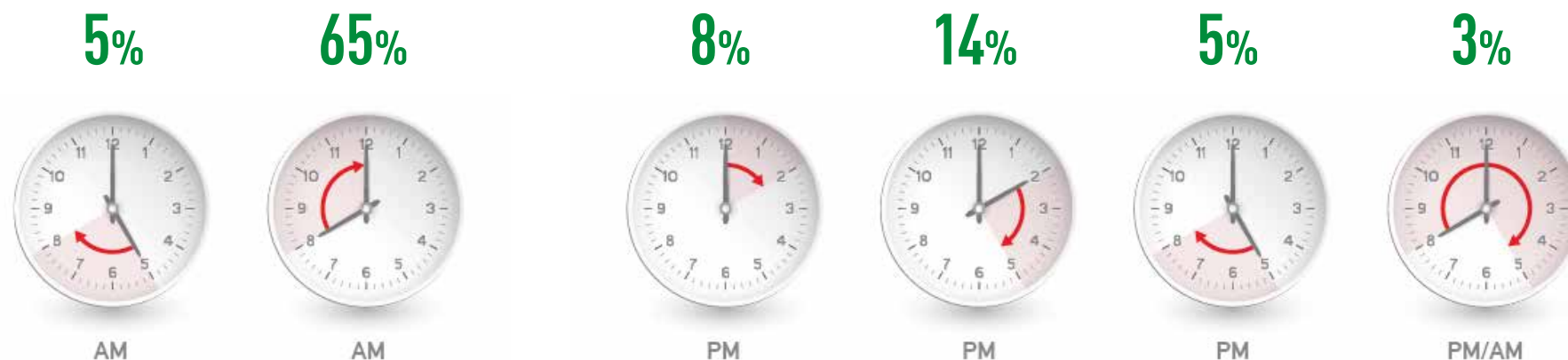
A fundamental problem with working in a central office location is that most people are expected to keep similar hours. This doesn't necessarily fit with everyone's views of when they feel most energised and productive.

Homeworking gives people the freedom to work when they feel most like it. For some it will be the three hours after waking. For others it will be afternoon, when people who have been incarcerated in offices are stampeding for the doors, and quiet thinking has to be done against the background of a vacuum cleaner.

Of the Leitz sample, an overwhelming 65% said they are at their most effective between 8am and midday. Which leaves (a not insignificant) 35% who feel they perform better at other times.

There is a strong argument for organising your working day to focus on activities that require your concentration or creative inspiration at the time that best suits you. This is a time management approach used by many writers.

What time of day are you at your most productive?



The loneliness of the long distance worker

Working at home one day a week or for a few hours across evenings makes limited demands on one's personal resources.

But when it becomes part of a more formal or frequent routine, the benefits have to be balanced against a range of issues.

As noted in the *Trip* study earlier, solitude is often cited as a major drawback of home working (this is of course the flipside of not being constantly interrupted).

The reality is that you are only as isolated as you want to be. Modern work is as much about collaboration as personal projects.

Working at home doesn't mean people are less collaborative, it just means it is done in a different way.

Facetime, Skype, Google Hangout, and intranet meeting places mean that you can be as visible (or not) as if you were physically present.

Nevertheless, concerns still exist. Of the Leitz research sample, over a 1/3 cite being out of touch, or out of the loop as the biggest concern they have about mobile and home working.



'Everywhere Working' – and getting things done

Given the high level of interruptions in the office (every 3 minutes on average, as noted earlier) it is ironic that employers are concerned about distractions when working remotely.

Some companies, usually larger corporations, put great store by it, but there is limited evidence that even the most progressive corporations have prepared their 'Everywhere Workers' for a more fluid style of working.

Self-discipline to efficiently work out of the office or at home is always a fundamental issue for companies that decide to offer location neutral working options.

Given the high level of interruptions in the office (every 3 minutes on average, as noted earlier) it is ironic that employers are concerned about distractions when working remotely.

In fact, among the Leitz sample, the lack of interruptions is actually the second most important benefit derived from home working, after not having to commute.

The liberation of 'Everywhere Working' can be daunting, but if your output falls in quality and quantity after working out and about or at home, someone is bound to notice. It's probably best for your career if the first person to spot it is you.

The habits of authors can be instructive. They tend to be self sufficient, unless they need to meet the schedule of a regular publication. While they usually work from home, many have routines which the 'Everywhere Worker' will recognise.

JK Rowling wrote in a coffee shop to save on heating, Gertrude Stein and Nabokov liked to write in the car. Maya Angelou created her own remote office, by renting a hotel room for writing in the same town she lived in.

Routines are usually set to match the writer's lifestyle and self-perceived times of highest creativity – again quite different from the 9-5 mentality of most workplaces.

"When I am working on a book or a story I write every morning as soon after first light as possible." (Ernest Hemingway)

"I work in the morning at a manual typewriter. I do about four hours and then go running. This helps me shake off one world and enter another." (Don DeLillo)

"I'm always in a hurry to get going, though in general I dislike starting the day. I first have tea and then, at about ten o'clock, I get under way and work until one. Then I see my friends and after that, at five o'clock, I go back to work and continue until nine." (Simone de Beauvoir)

Two things to note; there is no magic formula for this type of independent working, and the authors had a structure and routine that worked for them.

For those who don't have the luxury of rigid self-discipline, the following guidelines might help:

Know what you need to do – make a list of tasks for the next day the evening before. This way you know what you're going to be doing and, in theory, should sleep better.

Start with the most important tasks and/or those you want to do the least – this means you are doing the hard stuff when you are fresh, avoiding the nagging in your brain telling you that you should be doing XYZ instead.

Cut yourself off from interruptions – an advantage of 'Everywhere Working' is that you can decide to turn off your mobile, computer and focus. The world of work is unlikely to spin off its axis if you've isolated yourself for an hour or so.

Make breaks rewarding – listening to music, going into the fresh air or even doing press-ups like Kurt Vonnegut isn't something you can easily do in the conventional office environment. (Perhaps in years to come, archaeologists will puzzle over why the excavated bodies of 'Everywhere Workers' seem more muscular than the norm).

Space - the final frontier

Earlier, we discussed the pressure of space in offices, but having a discrete or defined area to work, focus and concentrate in the home is often the biggest challenge faced by 'Everywhere Workers'.

Homes are getting smaller, with wide variations across Europe. From a miserly 76m² in the UK, 83m² in Sweden, 109m² in Germany, 112m² in France, to up to 137m² in Denmark.

Research carried out by Leitz across a European sample shows that around 30% are working in their living or dining room, and 20% in the main or spare bedroom. Over 50% of 'Everywhere Workers' have no dedicated separate room at home to serve as an office area.

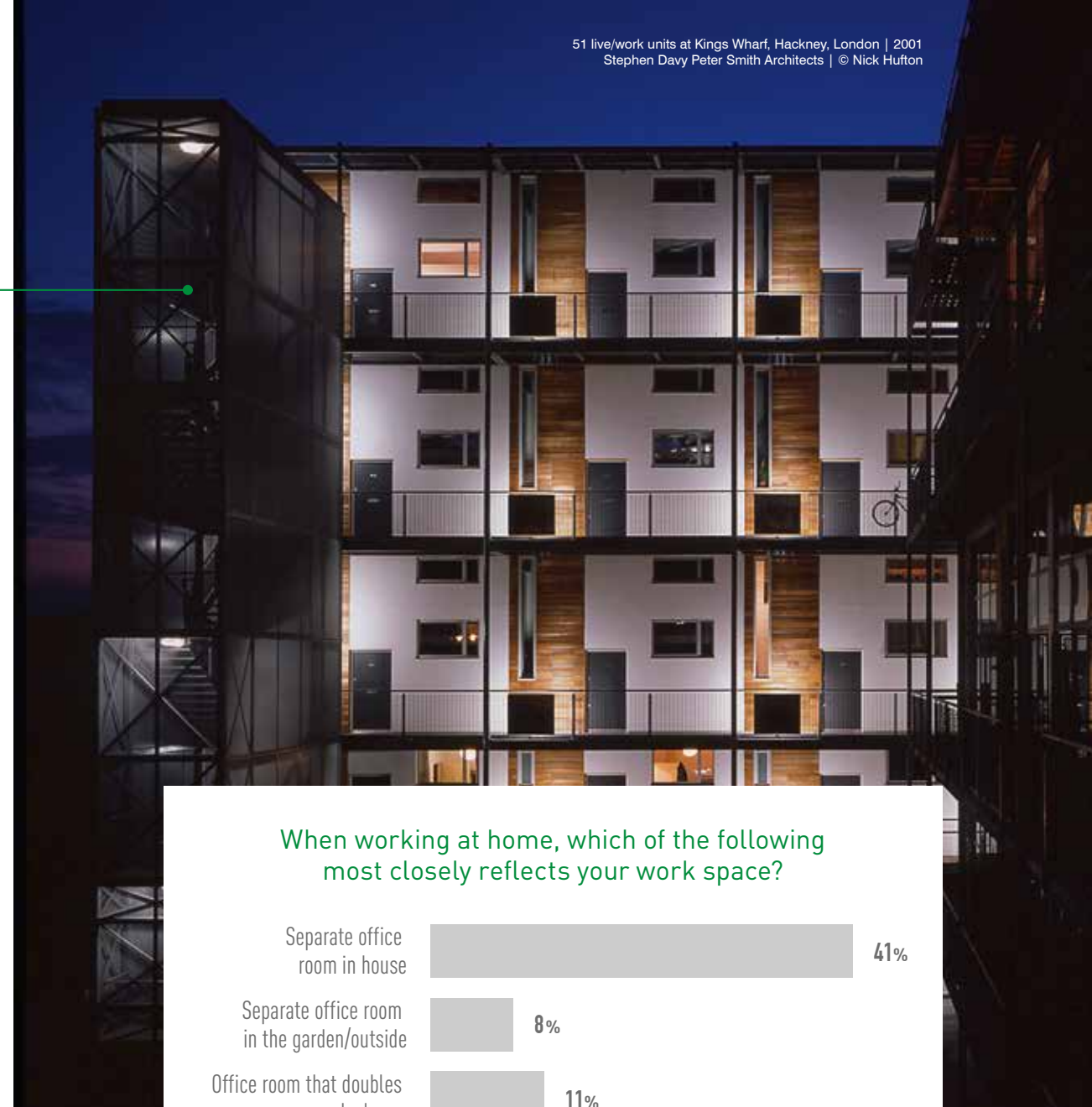
Compromises always have to be made, especially for those with families where the challenge lies in building a degree of flexibility into home configurations.

It's no wonder that the same survey shows that lack of space and the presence of domestic noise are the biggest issues for people working regularly from home.

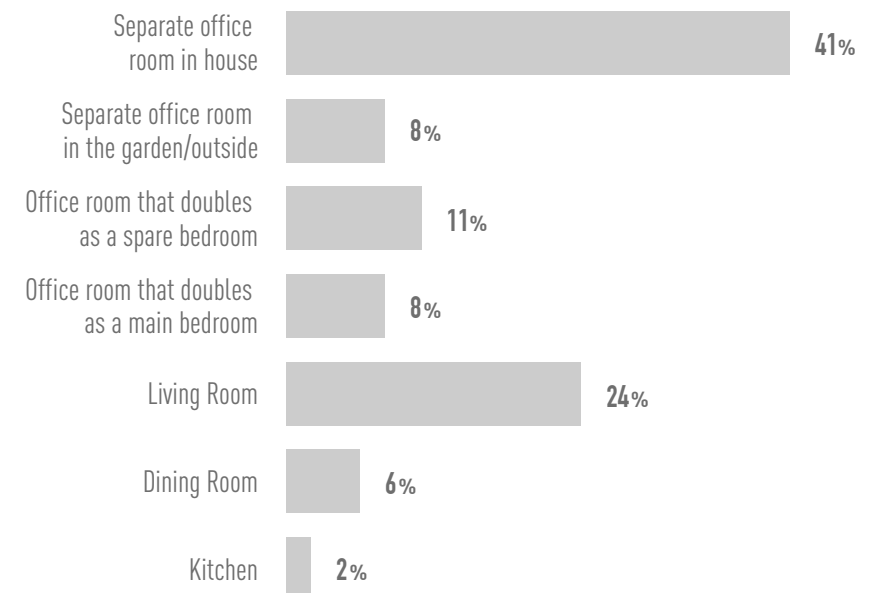
One interesting development to address issues like this is the concept of 'workhome', which combines both work and living space together. One of the earliest of these is the King's Wharf development in London, which comprises 57 live/work units alongside 13 dedicated business premises. In a way this is nothing new – most cottage industries have operated like this for centuries. The difference is that premises are now being created to try to deliver the best of both worlds. One of the major challenges in many countries relates to legislation and planning, with some units hard to classify.

Is this overlap between home and work environments a good or bad thing? Many believe that working from home can increase stress if employees work in the same place where they sleep and relax.

Tammy Allen, a psychology professor at the *University of South Florida*, believes that employees working from home should create "a specific place at home where you work that has a door, and that door may even be closed during the day if there are others in the house." Easier said than done if you live in a one bedroom flat the size of a tube or metro carriage, the average size of a UK new build, or have small children or pets demanding your attention.



When working at home, which of the following most closely reflects your work space?



Space - the final frontier

Personal organisation is an old issue. *Parkinson's Law* stated that 'work expands to meet the time available'. A follow-up might be 'work expands to meet the space available.'

Some people are neat and tidy, but it is very easy for the home office environment to become disorganised, with papers and materials spreading around the house or flat.

In 2015, *The Guardian* newspaper in the UK invited people to send in pictures of their work area. Many of the respondents were home workers and there was a degree of similarity in the desk areas submitted, in terms of being cramped and chaotic.

Easy access to materials at home is another challenge. Despite how much most of us work at home, we don't have the same equipment as we do at work as the table from the Leitz research shows below.

Space isn't just about having a few flat m² to lay out papers or place a laptop. Filing and storage are issues, as the table below shows. Over 2/3 don't have a filing cabinet or even a specific drawer for putting work stuff away. Out of sight is out of mind – so perhaps it's no wonder that so many people have problems switching off.

Despite the digitisation of work, most people still prefer paper when it comes to deep reading or concentration.

Of the Leitz sample, 52% read off paper, and 54% write on paper in their office everyday. Only 12% do it one day a week or less.

The paperless office, as first proposed over 40 years ago, or indeed the paperless home, remains a long way into the future. So the problem remains – where are we going to put it all?

Which of the following do you have in your office and/or home?

	Have at home	Have at office
Stapler	66%	75%
Hole punch	48%	72%
Lever Arch Files	48%	72%
Storage boxes	46%	73%
Filing cabinets	32%	75%
Drawer for work related items	30%	75%





Looking good – feeling great

In addition to space, there is the issue of aesthetics. You've carefully planned the interior of your home and now you're trying to squeeze a workspace into it. Even worse, your stapler doesn't match your kitchen accessories. This doesn't seem to have occurred to many, but our research shows that:

- **70% of the Leitz sample sees aesthetics as more important at home than in the office.**
- **73% want their work equipment to match the décor of their home.**

Perhaps this explains why over half have a different brand of these items at home from the ones they have at work.

The Leitz Style or WoW collections of desktop products – files, letter strays, staplers, and folders – are ranges that offer aesthetic effects suitable for different environments, bridging the home and office gap.

The trend to BYOD (Bring or Buy Your Own Device) is resulting in forward thinking companies giving their employees budgets to buy their own equipment. However, we seem to be encouraged into thinking this is only for technology, and rarely for home specific equipment.

24% of the Leitz sample have a formal BYOD policy at their place of work, a further 18% can buy products if it is signed off by their superior. Less than 1/4 believe it would be acceptable to spend company money on office furniture, such as a desk lamp, for home use.

There is a lack of logic here, as more and more people are working at home, whether formally or informally. The outcome is that a large proportion of the 'Everywhere Workforce' are not only doing work outside of their contracted hours at home but are also subsidising the company that they work for, when buying their own equipment and materials.

Moving on to technology; most commentators believe that the home has the potential to be a more productive and rewarding place to work than the office. This is in terms of personal control of your environment (heating, lighting, ambience) and home audio/video. Domestic appliances are leading the way faster than office infrastructure, which is more costly and disruptive to introduce.

A few examples:

Nest monitors both daily usage of a person's home and their presence. You can forget about having to manually adjust heating, because it is done for you (and there may be personal tax benefits for the self-employed in working out how much energy is being consumed in a working context).

Amazon Echo responds to voice commands to dim the lights, control temperature, or turn on your desk fan.

Apple's Siri will also allow you to send voice commands to devices around the home. The 'Everywhere Worker' may find the instant responsiveness of digital equipment faster and less questioning than administration assistants.

Samsung have pledged that everything they produce will be internet-enabled by 2020, domestic and personal appliances are core to their offer. Their 'Smart Things Starter kit' retails at around €300; an ideal way to spend your BYOD budget.

Leitz asked their sample about these intelligent devices. They found that 23% already have them. A further 19% would be very keen to have them in the future.

Looking into the future, potential smart home innovations, which will make life easier and more productive for home workers, will include soundproofing spaces with invisible baffles to keep noise in and out. This means means that the home worker's professional impression will no longer be undermined by the sounds of barking dogs and fighting children on conference calls.

Space-saving will come from flat surfaces operating as screens. Intelligent furniture will recognise who you are, detect the mood you are in and adjust itself accordingly. All paper will be digitally scanned and then self-destruct, solving the home filing problem identified earlier.

Domestic versions of workspace pods or micro lounges such as *Brody* (currently only available commercially, see images on pages 9&24), may allow home working to be in a defined space, and stop the spread to every room in the house.



Making work, work – the right tools for the job

Being location neutral in how we work sounds attractive, and often is. However, as noted earlier, while being freed from the confines of the office, 'Everywhere Workers' are also deprived of the benefits of infrastructure, support and equipment.

If you are given the opportunity to become an 'Everywhere Worker', you are already spending a couple of days working at home, or you find yourself playing catch-up out of hours on a regular basis, here's some things that you might need.

Space-saving solutions for home working include using small alcoves or under-utilised closets and wardrobes to create desk spaces. If there isn't room for a filing cabinet, then there are solutions like Leitz's Click and Store filing systems.

The more 'out of sight, out of mind' your work can be the better. Otherwise, work is present in your everyday life, making it a constant reminder that is hard to escape.

Managing your desk area is important. In the office workspace, untidiness is sometimes condemned, sometimes tolerated, and sometimes celebrated as a sign of free- thinking.

At home, the choice is yours. But again, the chances are that your workspace is multi-functional. Think about having desktop organisers at home from paper trays in contemporary designs that don't look like they've been recovered from a skip outside the office, to stands that charge phones and tablets. These last take up less space and mean that your devices are not likely to die on you if you have to go somewhere else in a hurry.

Nearly 3/5 people consider adjustable personal & office lighting important or very important - more important even than an ergonomic mouse & keyboard and personal heaters – but few will have good lighting at home.

It's worth thinking about modern LED solutions for the home, adjustable for light and colour temperature to suit your personal preferences and mood.

Power on the move is a constant issue. Leitz research shows that 60% of business people totally run out of battery power at least once a month. 60% have to restrict their phone usage at some stage each month to conserve power (this happens to a small minority 10 times or more, or for two days, in every working week).

As a result there is a high level of innovation in mobile charging devices. On the one hand, portable credit card sized devices that can be carried in the wallet for an emergency quick boost. Alternatively, high capacity power banks with the resources to charge a phone or tablet several times over for long trips or keeping multiple devices powered up. Looking further into the future, we will see growth in high-speedchargers – prototypes in development at *Stanford University* for example aim to deliver a full charge in a minute or less.

The provision of power may not be an issue when at home – but its location often is. Just as the average office conference room is often designed to necessitate crawling around under tables looking for sockets, and many 'coffices' have the bare minimum, so home layouts frequently result in trailing cables.

An efficient home office will be equipped with multiple USB desktop charging points, portable chargers, as well as cable management to avoid trips in confined spaces – or the dog pulling your laptop onto the floor.

Fusion of devices will also help people struggling with limited desk space at home. For example with monitor, keypad and mouse fused into a single entity. Keyboardless devices that project the keyboard onto a flat

surface are available – assuming they can be found among the piles of paper that seem to characterise many peoples' desktops.

Just as companies have a duty of care relating to work conditions in the office, logic dictates this could, indeed should, be extended to ensuring that an employee's home working environment is optimised.

Some companies will not let employees work at home until a risk assessment has been carried out. At the other end of the scale, as seen earlier, it doesn't occur to most people to ask their company to supply equipment for home use. They sit at an ergonomically designed desk on an ergonomically designed chair at work, and perch on a stool with their laptop on their knee at home.

Most people are familiar with the mood and colour theory around working and concentration. You have colour schemes in your home décor, why not in the equipment you use? We've previously seen that a majority of the Leitz sample see a real value in having aesthetically pleasing equipment but what we don't know is the extent to which aspiration becomes action.

The reality is that modern desktop equipment from companies like Leitz comes in an array of colours, finishes and styles that look attractive in any environment.



The Resellers challenge

This move towards 'Everywhere Working' and the need to have the right tools for the job is an issue for retailers and resellers.

The home environment is quite different in ambience and atmosphere. Traditional office finishes are often inappropriate for a home-based consumer, looking to mix and match with their existing décor.

Established vendors of office equipment need to recognise that their customer base, and their needs are changing.

This has implications for the types of items stocked, with the future requirement to diversify more in terms of categories – especially electronic products.

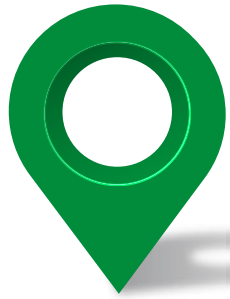
It also means that resellers will have to rethink the role of aesthetics in the ranges they sell. The home environment is quite different in ambience and atmosphere. Traditional office finishes are often simply inappropriate for a home-based consumer, looking to mix and match with their existing décor.

Individuals will become an increasingly important market segment: smaller orders, a just-in-time mentality and far less inclined to visit retail stores. So the quality of the online experience will be critical, as will speed of delivery.

At the same time, designers and retailers specialising in home furnishings will have an untapped market in home workers. We have seen how many people are making do with environments and equipment.

Many home retailers ignore or only offer a token presence here. In terms of space management solutions and new products, it is arguably one of their largest future growth opportunities.





Conclusions





Conclusions

The world of work is changing.

That's nothing new. Over the last 100 years, the electric typewriter, the photocopier, the mainframe computer, the company car, the floppy disk and the mobile phone have all resulted in new ways of working.

Portfolio careers and the increase in contract and freelance working mean that responsibility is being transferred to individuals in ways that have never been the case in the past.

The difference now is the speed of change and the way in which everyone is affected – globally. The whole structure of our working lives is in a state of accelerating transition.

This is something that both companies and individuals will have to get used and adapt to. Portfolio careers and the increase in contract and freelance working mean that responsibility is being transferred to individuals in ways that have never been the case in the past. We are now all masters of our working destinies.

1. The changing office

Offices are evolving, but still remain the centre of the working lives of most of us, as increasingly we are adopting location neutral practices and habits. Just as we are developing portfolio careers, so we will be using portfolio workplaces; convenience and efficiency are key drivers, enabled by constantly evolving connective technologies.

Work will be everywhere. Or at least everywhere that congestion-free Wi-Fi is available. Against this background, the fixed office model will come under pressure for a variety of reasons.

A blend of worker typologies such as Pillars, Roamers, Explorers and Pioneers, will make traditional space planning both irrelevant, and economically unviable.

Open plan and cubicle models each have their drawbacks. Given freedom of choice, only a minority of office workers would work in either out of preference.

The more knowledge-based our work becomes, the more that our environments need to encourage collaboration, while also giving people the ability to think and concentrate.

2. Travelling to work

The growth of urbanisation makes getting to an office a chore that many feel unnecessary and would choose to forego. It impacts on their personal wellbeing, as well as their wallets.

There is evidence that workers who do not habitually go to a central location are happier, suffer less stress, and, of course, spend less time and money on travel.

Innovative design solutions are coming from both ends of the size spectrum. At one end, corporate super structures, which provide a home away from home, and project the company's brand values and personality. These values increasingly include giving the employee equal importance to the customer in the eyes of many businesses.

At the other end there are innovative start-ups. Without legacy issues, they are attuned to the desires of a (usually) younger workforce that wants informality and an intimate sense of belonging.

We then have the squeezed middle; old fashioned, formulaic offices, which will be increasingly unattractive to the more selective and in-demand workers, who will want to work in locations that are convenient and stimulating.

3. 'Everywhere Working'

Travelling to the office is becoming less relevant to the modern workforce as the work now travels with them. The 'third place' for work after an office or a home has become just one of many options, including client offices, stations, airports, and of course the trains and planes themselves.

'Everywhere Working' is different from traditional mobile working, it is no longer restricted to sales people and senior managers. Modern technology means that this freedom is now available to any knowledge worker.

More people are spending part of their time working on the move. They are happier and would even consider a pay cut to support this flexibility, but different working patterns can produce different problems.

Organisations must support 'Everywhere Workers' with the right physical tools (the average office worker still handles 10,000+ sheets of paper a year) as well as working policies and some concept of a 'base' – even if it is just a draw.



Conclusions

4. Today's homeworking

Homeworking is a reality for the majority; a blend of agreed time, ad hoc time and making up for lost time. There is little large-scale research on how effective time spent at home actually is. From our sample, only 1/3 feel they concentrate better than they do at work. Comfort and convenience have to be offset against quality of output.

Unless we have the right environment and a strong sense of self-discipline, it is arguable that home working should only be part of the mix, used primarily for specific tasks that benefit from a lack of interruption.

When work is done, it is as important as where it's done. As we have seen 65% of the Leitz sample say they are most effective between 8am and midday. So one of the most productive hours of the day is probably spent in a traffic jam.

Without going to what some people may view as the extreme of the 6-hour day being experimented with in Sweden, companies and individuals should consider what an effective working day looks like and be prepared to let people set their own working hours to suit times when they are most effective.

5. Equipping your home for (real) work

Offices are designed as workplaces, homes aren't. The growing band of 'Everywhere Workers' who make home a partial base are often making compromises.

Over half of our sample doesn't have a dedicated room to serve as an office area. The blurring of home and work is being accentuated, potentially both to the detriment of the worker's lives, and the quality of the work they carry out.

Rather than treating the home as the employee's responsibility, there is a case for employers to provide equipment kits for home workers and advise on the best use of space management. This includes expanding the trend for BYOD from the provision of electronics to include desktop items, filing and dedicated ergonomically suitable furniture.

However, it's not just about functionality. The aesthetics of the home are generally important to all of us. If work is to be a regular part of being at home, the equipment we use has to be in harmony with our décor and colour schemes. At the moment, few sellers are thinking about this.

6. Tomorrow's opportunities

The rise of the 'Everywhere Worker' provides challenges, but also opportunities for retailers and resellers as well. The customer of tomorrow will be very different from that of today.

Customers will make more individual, rather than bulk corporate orders, keep a smaller inventory, buy on a just-in-time basis. All done with a greater emphasis on online tools. There will be an increased focus on aesthetics and modular portable equipment, which is easy to store and looks attractive.

Today's businesses recognise knowledge workers as an essential asset and their motivation is a business critical issue. Large companies like Google create branded offices on a massive scale, whilst smaller organisations look for simpler solutions that still deliver branded working environments. Supporting these businesses will be a key issue for the office products industry.

Whether you are a retailer, a procurer of equipment, a senior manager or an empowered individual, all assumptions about how, where and when we work need to be constantly re-evaluated if we are to flourish in the world of 'Everywhere Working'.



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