



Live. Work. Connect.
A WiredScore Report

November 2021

WiredScore

Executive Summary

Living and working in a connected world

Over the course of 2020-21, the real estate industry has been at the epicenter of one of the most significant global events in our lifetimes. The world in which we live, work and connect with one another has been turned upside down and, as a result, we have borne witness to fundamental and potentially permanent changes in the way we conduct our day-to-day lives.

To dig deeper into how these changes have impacted both the real estate industry and society as a whole, WiredScore conducted a survey of those who have transitioned to home working or studying throughout Europe¹. The Live. Work. Connect. report deciphers the influence of the COVID-19 pandemic upon the rhythm of life and discerns what decision makers should be prioritizing in this new era of real estate.

A breakdown of the report's key findings:

-  1. Productivity levels when working from home have increased across Europe during the COVID-19 pandemic.
-  2. The desire to remain constantly connected has brought to light the need for excellent digital connectivity, no matter the location.
-  3. Whilst digital solutions are being implemented within buildings, a significant knowledge gap exists, leaving many unable to use the technology to its full potential.

Part 1

Out of Office

To establish the best and worst places to work from home throughout Europe, WiredScore used metrics including, productivity levels post-pandemic, home broadband quality, wellbeing and level of support from employers, to determine an overall country index.

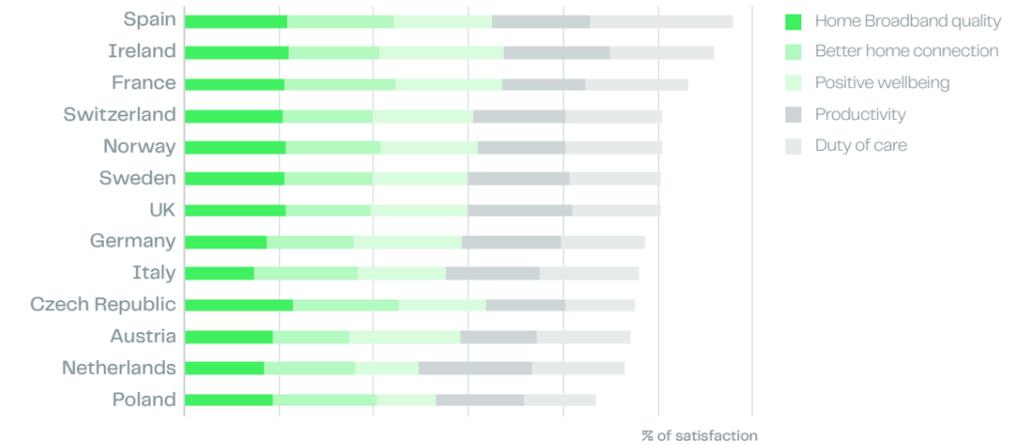
Best/worst place to work from home in Europe:

1	Spain
2	Ireland
3	France
4	Switzerland
5	Norway
6	Sweden
7	UK
8	Germany
9	Italy
10	Czech Republic
11	Austria
12	Netherlands
13	Poland

Global data gathered in a 2021 survey conducted by WiredScore in partnership with Opinium Research.

The index measures those countries in which the workforce are most and least satisfied with the working from home experience. Spain, Ireland and France emerge as the European countries that deliver the highest levels of satisfaction, whereas Austria, The Netherlands and Poland comparatively deliver the least.

Where's best to work from home? A detailed country breakdown.



Global data gathered in a 2021 survey conducted by WiredScore in partnership with Opinium Research.

There are many external factors that might make working from home more or less desirable in certain areas. WiredScore compared opinions on: home broadband quality, satisfaction in connection², impact on wellbeing, impact on productivity, and belief in employer duty of care in regards to connectivity.

This shows that, whilst working from home has overall grown in popularity, this is not a completely pan-European view, and work needs to be done to achieve an even spread of satisfaction when it comes to working from home.

Wellbeing emerged as a key factor for many respondents, and 62% of Europeans agree that working from home has benefitted their wellbeing. However, it's notable that (during the COVID-19 pandemic) 60% of Europeans stated that poor internet connection has caused them stress whilst working from home, which led to one in five³ people missing important meetings.

²*(If broadband connection is better at home compared to work/university)
³ 22% of Europeans surveyed

Couple this with the fact that 20% of Europeans increased their mobile data package during the COVID-19 pandemic to boost in-home connectivity and support working/studying from home, and the employee is placed at a financial disadvantage.

It then comes as little surprise that over half of Europeans think that employers/universities have a duty of care and responsibility to provide financial support for the costs incurred to improve connectivity levels when working/studying from home.

Looking at the bigger picture, it's therefore socially and commercially beneficial for the homes of today and tomorrow to be built upon a strong foundation of digital connectivity. This will guarantee that today's residents will be able to keep pace with the hybrid habits of tomorrow.

In regard to productivity, when working/studying from home, 49% of Europeans now believe themselves to be most productive. This figure is up from 35% who believed home to be the most productive space before the COVID-19 pandemic. What this increase exposes is a shift in general public opinion on working from home, placing flexibility as paramount and connectivity as essential: where there was once resistance, WiredScore has noted a newfound openness to working from home.

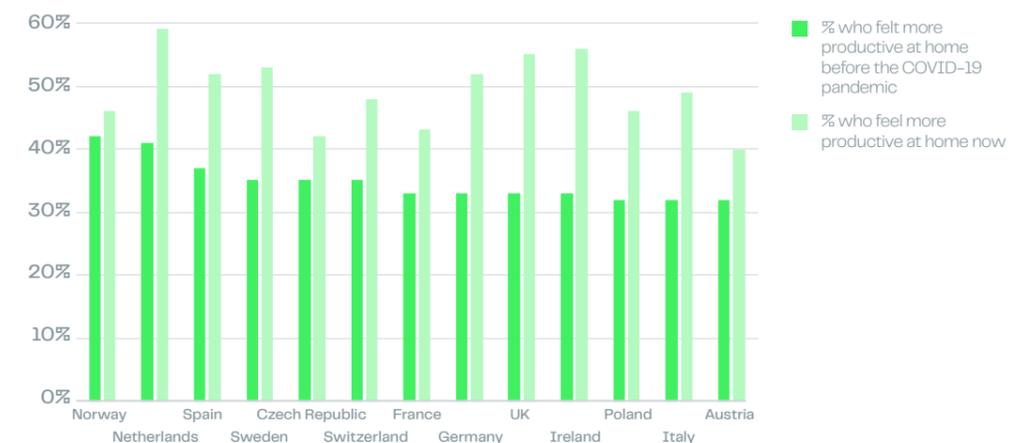


where there was once resistance, WiredScore has noted a newfound openness to working from home.

⁴ 57% of Europeans surveyed

The most significant shift in public perception is in Ireland, the UK, and Germany, where the percentage of those who felt that working from home is more productive rose by 23, 22 and 19 percentage points respectively. Comparatively, the opposite is true for Norway and Czech Republic where a very small difference in opinion was observed. The full country breakdown throughout Europe is as follows:

Sense of productivity levels when working from home before the COVID-19 pandemic compared to now.



Global data gathered in a 2021 survey conducted by WiredScore in partnership with Opinium Research.

Overall, working from home is shown to be far more successful and achievable than a pre-pandemic outlook had us to believe. For the future of hybrid working to succeed, the in-home connectivity capacity of the workforce will need to be guaranteed. It will likely become the responsibility of the employer to support their workforce in connecting via an immediate and reliable network. Whilst it'll be the responsibility of landlords/developers to make sure that the homes of today and tomorrow incorporate first-rate connectivity to facilitate productivity, ensure cost efficiencies and reduce stress when working from home.



Despite Europeans reporting improvements to their wellbeing through working or studying from home, there are still challenges to overcome; stress caused by poor internet connection being one of them.

Landlords need to care about ensuring optimum working conditions outside of offices and universities. In an era of increased reliance on sound digital infrastructure to complete work, providing reliable internet is no exception to this.

William Newton, President & MD, WiredScore

62%

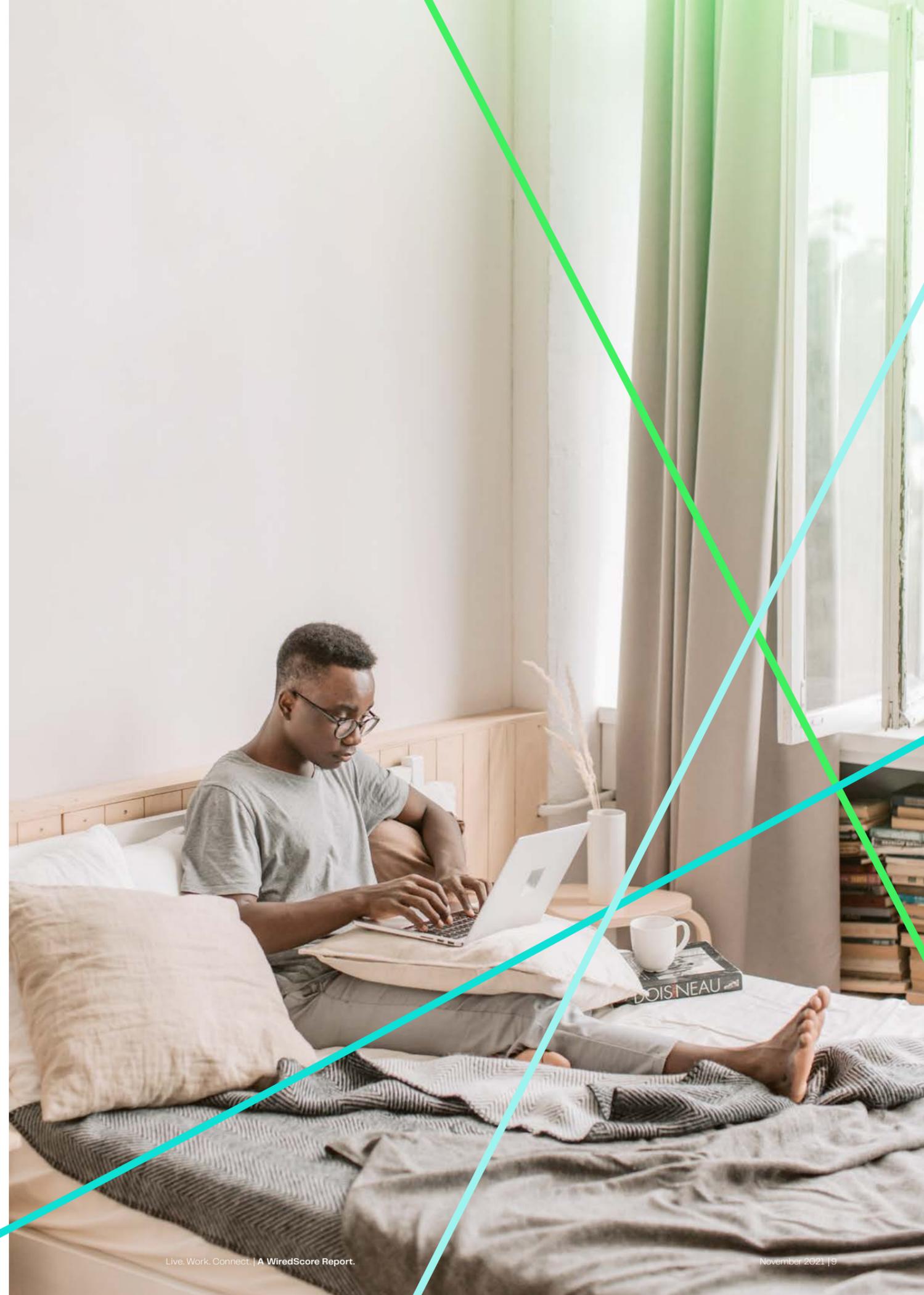
of Europeans agree that working remotely has benefitted their wellbeing.

60%

of Europeans agree that poor internet connection has caused them stress.

57%

see employers as having a duty of care and a responsibility to provide financial support for remote work/study.



Part 2

The Connected Commute

For many, the commute is an extension of the working day – bridging the gap between the workplace and the home, serving as another opportunity to complete occupational tasks.

The ability to remain connected whilst in transit facilitates the flexible working habits that the past 18 months have proven to be viable. Indeed, over four fifths (81%) of European adults who have worked or studied from home say they connect to the internet when they commute to their place of work/study – this figure is highest in Italy, where 92% of Italians connect on their commute, followed by Poland (91%) and Switzerland and Czech Republic (both 87%).

While many respondents naturally use this time to catch up on social media and listen to music (58% and 50% respectively), a third of respondents (31%) used their commute time (which is on average 31 mins in one direction) to do work. This figure is highest in Czech Republic where 44% of respondents use the time in between the office and home to bookend their day with work.

What these statistics demonstrate is that a third of the workforce is adding over an hour of work onto the normal working day, by using their commute time as work time. Whilst this suggests that people are able to work on the move, and they don't depend on a desk to complete tasks, it seems they do depend on digital connectivity as the lifeblood of efficiency.

81%

Europeans use internet connectivity on their commute.

31%

Europeans use internet connectivity specifically for working whilst commuting.

62 minutes

Europeans, on average, spend over an hour commuting each day.

Part 3

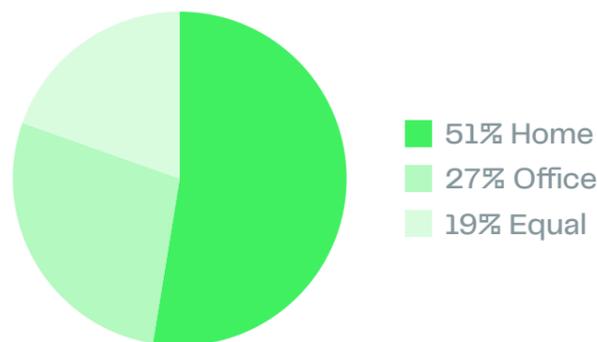
Destination: Office

The office is a space designed to support commercial activity, and serve as an impetus to come to work. An office should be a safe and healthy working environment that fuels productivity, supports collaboration and facilitates the wellness of those operating within it.

Now, as hybrid working becomes the new nine-to-five, well connected office spaces are vital as the fallout of the COVID-19 pandemic sees the workforce’s habits shift to an approach that demands greater flexibility and dependable connectivity both at home and in the office.

When it comes to office space priorities, 41% of Europeans place quality digital connectivity at the top of the agenda, second only to location and good transport links. 72% of people rate their internet connectivity within the office/university space as “Good” yet, by comparison, 51% of Europeans still believe their home internet connectivity to be “Better”.

Where do Europeans get best boardband connection out of the home and the office/campus?



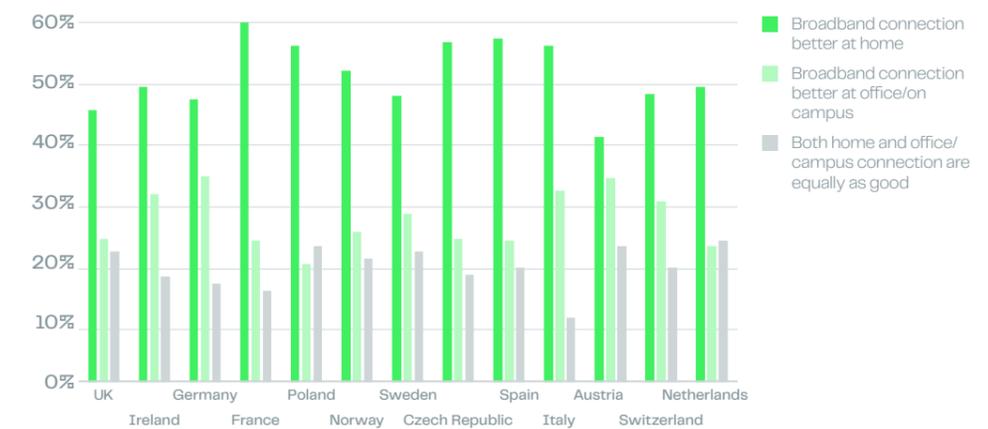
Global data gathered in a 2021 survey conducted by WiredScore in partnership with Opinium Research.

The fact that only 19% of Europeans believe their home and office/campus connectivity to be equally good is enlightening – if the workplace is to serve as a magnet that draws employees in, commercial landlords must work with tenants to boost the desirability of working in the office.

Continuing from this line of thought, to support flexible working habits, the workforce of the future will demand superior connectivity from their workspaces and employees must be able to rely on connectivity levels being able to match (or, indeed, better) those at home.

The full country breakdown of opinion is as follows:

Where's best for connection? Home, Office/On campus, or Both?



Global data gathered in a 2021 survey conducted by WiredScore in partnership with Opinium Research.

The highest percentage of people who consider both home and office broadband to be of equally good quality is in Sweden and the Netherlands. And, notably, the lowest percentage of people who think that both home and office broadband are of equal quality is in Italy.



...the desire for more in-office technology exists, but the ability to use it does not.

French and Spanish people are most satisfied with their home broadband, compared to German and Austrian people who are most satisfied with their office/campus broadband.

Further, offices must now guarantee that occupants will be safe and well in their place of work. This has led to a significant uptick in the implementation of smart tech, such as occupancy detection and desk booking systems, throughout offices to aid the autonomy of wellness. When stepping out of the home and into the office, the ability to control one's own environment from a health and wellbeing perspective is dictated by the space in which we operate. So, it's of paramount importance that the workspaces of the future are digitally equipped to prioritize public health and wellbeing.

In an ideal world, four fifths of office workers⁵ (79%) say they would like their office to be technologically advanced, however, the use of technology within an office space is largely dependent upon how well people are trained. Under half of office workers⁶ receive the right level of training to make full use of all in-building technology. This identifies a significant knowledge gap – the desire for more in-office technology exists, but the ability to use it does not.

79%

office workers would like their office to be technologically advanced.

41%

Europeans place quality digital connectivity at the top of the agenda when considering office space priorities.

⁵ WiredScore Smart Offices Report, February 2021. 1,502 office workers in Australia, Canada, France, Germany, UK and USA
⁶ 47% respondents in the WiredScore Smart Offices Report, February 2021.

Looking forwards, landlords and employers must be proactive in implementing technology within the workplace. They must also be able to offer the right training and support so that everyone within the space can take advantage of the tech designed to benefit them. In essence, getting the technology right will drive people into the office while making sure the people can use the tech will keep them there.

Tenants are now looking to offer their employees ultimate flexibility and a workspace in which productivity and collaboration can thrive, and it's the responsibility of landlords and developers to facilitate this. The office of the future will therefore need to be dynamic and adaptable. It will be cost efficient, sustainable, inspirational and future proof – impeccably adapted to the needs of the user, brimming with data-driven efficiencies and teeming with collaborative opportunities. In other words, the office of tomorrow will be a smart space that serves as a reason to go to work, rather than just a place of work.



Our industry is in the midst of a dynamic period of change today. Old models are being redefined and approaches reimaged. Buildings must adapt to this challenge to become more sustainable, more customer-focused and critically we must be able to measure performance by becoming more technology and data centric.

Paul Bagust,
Head of Property Standards, RICS

Part 4

Looking to the Future

The future of real estate will demand that the buildings in which we live, work and connect are able to evolve and continuously adapt to better suit the needs of the user. To accommodate this, digital connectivity must be top of mind for landlords, developers and employers to remain relevant, avoid obsolescence, attract and retain top talent.

To account for this preference for flexibility, real estate developers must factor connectivity into the design and build stage of a project, and employers must consider their employees' ability to connect at home, potentially offering financial compensation for the additional cost of better connectivity as part of a benefits package.

The feasibility of a hybrid future hinges upon exceptional connectivity being present within both the home and the office, yet over half⁷ of Europeans currently believe their home connectivity to be better than that in the office, showing that there's still a way to go before both spaces are as well connected as one another.

What's clear is that digital connectivity is fundamental to the way we live – we connect at home, at work, and whilst commuting – forcing real estate to build and retrofit with connectivity in mind.

751%



To learn more about WiredScore:

Find us online
wiredscore.com

Email us
hello@wiredscore.com