



AuraTM



AURA GLOBAL TREND REPORT Future Workspaces

2023 and beyond

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Introduction

As we head into 2023, rising costs, weaker trade and increased global uncertainty have piled more pressure on businesses which have only just emerged from the shock of COVID, and all its disruption – including the subsequent seismic shift in both working practices and the mindsets of employees and customers.

But despite this challenging context, we are seeing a very positive and – for the most part – people-centric drive to improve workspaces and the workspace experience. It’s clear that decision-makers are playing the long game, implementing strategies that will not only improve profitability today (through better efficiency, connectivity, agility, sustainability and resilience) but also future-proof their organisations, looking ahead to how workspaces might need to flex to optimally support changing business objectives as the economic climate, and business needs, shift over time.

Aura is at the forefront of workspace reimagining, and with our breadth of offering and depth of knowledge we are well-placed to lead our clients through the uncertainty, providing joined-up thinking to ensure optimal outcomes that continue to perform as time passes. Our industry-leading capability and unrivalled in-house expertise, coupled with a whole-market view and strong relationships across a huge variety of manufacturers, delivers the sort of results that make a tangible difference.



This paper outlines five of what we think will be the most influential global trends affecting the workspace over the next year or so, as the business sector endures what many agree is its most challenging period in decades.



Trend 1

The constant evolution of policies and practices

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Organisations across all sectors have been looking to find the right way to move forward after the disruption of the past few years, while contending with a very challenging economic climate and big shifts in the way people live and work. This is not going to be limited to a one-time change, however; we see iterative processes of continual improvement and adjustment becoming the norm for more and more organisations.

Hybrid working has become widely adopted, particularly by those in knowledge industries, but successfully meeting business objectives while using this model is contingent on finding the right formula in terms of working policies and practices, and the right solutions for workspaces too (both physical and digital). “It’s not simply a case of finding a new way of working,” says Alpesh J. Unalkat, CEO at Aura. “It’s about finding the right solutions for the current situation, and then evolving them as time goes by, so that they continue to be optimal as the business climate fluctuates and the business itself adapts accordingly. This agility ensures better resilience and ultimately better profitability.”

Some business leaders have indicated they expect a return to the office full time, but they are rather at risk of not reading the room. The fact that we have seen trends from ‘The Great Resignation’ to ‘quiet quitting’ since COVID restrictions were lifted suggests that some of the workforce will vote with their feet (or vote by putting their feet up) if they are forced to comply with employers dictating a wholesale return to the office. The best way forward is clearly as some kind of consensus of change, rather than a power struggle.

“Organisations need to directly engage with staff to identify where there are hybrid misfits, try to align preferences and work patterns where possible, and to be explicit about hybrid norms and expectations with new hires to improve fit going forward.”

Dr Matthew Davis, Associate Professor,
Leeds Business School

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Benenden Health’s 2022 *The Workforce of the Future* report indicated that 55% of the UK workforce are re-evaluating what they do for work, as well as how and where, as a direct result of the pandemic. It also found that 46% of working adults believe the pandemic has changed their relationship with their employer, and this figure rises to 70% for employees under 25. “Our research shows a hugely significant shift in the power balance between employers and employees,” explains Naomi Thompson, Head of OD at Benenden Health. “It has never been more important for businesses to consult with their employees and ensure that they are providing the necessary tools and support to create a healthy workplace.”

Naturally, with so many factors in play, and such a wide variation in organisational cultures (and in role requirements across a business), there’s no specific rule of thumb when it comes to a way of working that is fit for the future. But what does seem to be relevant across the board is that an agile approach to setting new norms reaps rewards: taking a people-centric approach to the design and refinement of policies and practices, rapid decision and learning cycles, and leveraging the power of connected technology. The gathering of quantitative and qualitative data upon which to base decision-making is also a commonality – from workspace sensors to provide utilisation metrics, to employee engagement processes to gain insight into workforce needs and wants.

46%

of working adults believe the pandemic has changed their relationship with their employer, this rises to

70%

for employees under 25.

Benenden Health’s 2022 *The Workforce of the Future* report

90%

of respondents gather utilisation data, up 11% from 2021.

CBRE, *Global Occupancy Insights*

“We’re not the same people that went home to work in early 2020. The collective experience of the past two years has left a lasting imprint, fundamentally changing how we define the role of work in our lives.”

Microsoft, Great Expectations: Making hybrid work work



After two years of COVID restrictions, and with working from home mandated for anyone who was able to fulfil their role remotely, people are not just more aware of the benefits of WFH, they have become more sensitive to the negative factors they might encounter when they head back to their organisation's physical workspace.

After a period of time working in their own environment – where the kitchen is close by, daily life is made easier (parcels can be delivered, loads of washing can run during the working day), and there's no commute to factor in – a 'return to the office' is going to be quite a wrench for many. Add in the fact that light and temperature levels, breakout space comfort, and even noise levels are less controllable, and you've already got a situation which may be less appealing for some employees, especially those whose roles involve a lot of deep work or other solo activities, those who are introverts, or those who have a long-term health condition, disability or neurodiversity.

We are seeing how organisations' workspaces need to offset the appeal of home comforts by fulfilling employees' needs properly; they must set the right environment for people to more easily and effectively achieve their work objectives, free from niggles and speedbumps. This is best achieved with a diverse choice of workspaces (from solo booths to large, fully equipped videoconferencing rooms), technology that 'just works' (the digital workspace interface must be wireless and device-agnostic), and the right booking and organisational systems in place to make sure people have access to the facilities and colleagues they need to have access to (whether those colleagues are remote or in-person). In addition, some companies are designing in leisure and wellbeing facilities, and hospitality-inspired décor, to improve the employee experience yet further.

“ When you've spent two years alone, you become very sensitive to noise. What we're hearing from HR departments is that people are hypersensitive to their environments. ”

Jeremy Myerson, co-author of *Unworking: The reinvention of the modern office*, 'Privacy at work and the rise of the 'quiet space', *The Financial Times*, November 2022

“Staff can't be forced to go to a space that gives them a lesser experience than at home,” explains Alpesh J. Unalkat, CEO at Aura. “As the CIO of one of our major clients put it, he wants 'half the space and twice the experience.' And he's not alone. We're seeing lots of demand for workspace solutions within a decreased office footprint, because there are fewer people in it at any one time, owing to hybrid working patterns. Clients want more analytics to optimise utilisation of that smaller space, and also an improved technology experiences for both staff and visitors.”

By providing the right environment, and the right tools, to facilitate effective working while ensuring personal comfort, organisations can ensure that staff who travel to one of their locations will make the most of their working day – and when the workspace works, they are more likely to make that choice again in future. This not only helps support a sense of community, and drive culture, but also improve employee wellbeing, aiding productivity as well as talent attraction and retention.

73%

of employees say they need a better reason to go in than just company expectations.

Microsoft, *Work Trend Index Special Report 2022*

“ 77% of those surveyed stated that investing in quality space is a more significant priority for their company than expanding the total occupied footprint. ”

JLL, *The Future of Work Survey 2022*



Trend 2

Human-centric workspace design



Trend 3

Fostering talent for the future

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There once was a time when some company bosses felt the way to attract the brightest and best talent was to pop a pool table in the corner and create a chill-out zone with beanbags, but – if it ever really worked for anyone other than a small creative agency in the early noughties – that time is long gone.

An extremely competitive market for talent has driven organisations to consider more carefully what candidates are looking for; it's not only about salaries, but experience and environment too, especially aspects geared towards wellbeing. We're seeing more organisations consider how their physical and digital workspaces provide an improved experience for their staff, which not only helps with retention, but attracts the best new talent, too. This is not only important for current profitability and competitiveness; it's essential for future-proofing any organisation. Today's trainee cohort includes tomorrow's C suite.

While anybody over 40 will be able to remember a time before technology, and particularly the internet, became a part of daily life, younger employees are 'digital natives' whose expectations of technology are rather higher. They're used to it being a tool that is infused in their daily lives, and connectivity as a given. This means that clunky systems and older tech is off-putting to this younger generation of workers – although of course over time the 'younger generation' will make up an increasingly large proportion of the workforce, meaning their preferences will have even more influence on business decision-making around workspace technology. Research by [Citrix](#), the cloud computing company, suggests that by 2025, 75% of the workforce will be born in 1981 or more recently, meaning that the majority of workers will very soon be digital natives.

“ Younger people are especially keen to use the office to establish themselves as part of their workplace community and feel more connected to their co-workers: younger generations are particularly looking to connect with senior leadership (78% of Gen Z and Millennials vs. 72% Gen X and older) and their direct managers in person (80% Gen Z and Millennials vs. 76% Gen X and older). Gen Z is also particularly motivated by working in person to see their work friends (79% vs. 68% of Gen X and older). ”

Microsoft, [Work Trend Index Special Report 2022](#)

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But it's not really about the tech, as such. In many ways, the technology should recede into the background and simply support the productivity and connectivity required company-wide. “Technology should just work, without niggles and troubleshooting, or having to go and find the right cable or download a new piece of software,” says Sajan Shivshanker, Chief Operating Officer at Aura. “Workspace technology shouldn't be about the product as such; it should be designed to relieve pain points and solve problems, control costs, improve productivity and efficiency, and elevate the experiences of both staff and customers. This doesn't come from a particular technology, it comes from choosing the right products and integrating them for the right tailored solution that supports business objectives.”

“ All businesses must plan strategically for retaining and upskilling their workforce. They should also think creatively about the future workplace, including how to engage new talent and improve workforce resilience. The winners will set new standards and outperform their competitors, whilst the losers will struggle to demonstrate the value of talent acquisition to their stakeholders. ”

Louise Shaw, Managing Director, Omni RMS,
[CIPD Resourcing and Talent Planning Report 2022](#)



67%

of Born Digital knowledge workers agree that the pandemic has shown their organisation needs to invest more in digital technology.

[Citrix, Work 2035: The Born Digital Effect](#)



Trend 4

One size does not fit all

Since embracing remote and hybrid working practices in a more strategic manner, we are seeing many organisations reconsider the size, function and layout of their workspaces; we envisage this becoming a perennial trend as business needs are tracked and continuous improvement processes ensure workspaces adapt to suit these changing needs over time.

Right-sizing real estate for a new way of working is a popular objective currently, and for many organisations (though not all) the trend is downwards. A survey by accountancy firm [Grant Thornton](#) in 2021 suggested that 39% of British companies expected to reduce their office footprint, with 74% of those expecting to cut back by up to a quarter, and 12% expecting to halve their space. We're certainly seeing a lot of contraction in square footage, matching the prevalence of hybrid working, and with clients also becoming more aware they can even drive a better staff and customer experience from a smaller space.

Right-sizing also includes setting up modular spaces which can flex to suit the number of on-site occupants for maximum space efficiency. In these thoughtfully designed buildings, floors can be closed when there is not sufficient demand, ensuring energy use is reduced, resulting in cost savings at the same time as improved sustainability. Hybrid working experiences are improved, too: it's not appealing to be sitting on your own in a vast space on an in-office day.

"We're seeing the most common pattern is that on-site worker numbers reduce on Mondays and Fridays, and that's when surplus space can be put on standby to match demand efficiently," says Tom Scott, Chief Technology Officer at Aura. "Uptake of sensor technology is also increasing, with decision-makers looking to measure utilisation and employee behaviour accurately, in order to make informed decisions about how the workspace can be tweaked to meet requirements as closely as possible."

"Hybrid work has a durable presence and organisations must embrace it at scale, adapting and transforming their portfolio to empower a dispersed workforce anywhere they work. Dynamic occupancy management will be crucial to enabling maximum flexibility and elasticity across the portfolio."

JLL, [The Future of Work Survey 2022](#)

With physical workspaces flexing to suit specific needs at any one time, it follows that this approach will lead to a huge variety in terms of how organisations plan and utilise their workspaces. The only real commonality seems to be that a physical workplace is still an important social and cultural hub for any organisation, and that employee needs and preferences – especially around hybrid working – are key drivers, but exactly what that space looks like has become less predictable.

It used to be that similar organisations might occupy similar spaces, but there are now more variables in the mix. Not only can connected workspaces support specific chosen business objectives – perhaps to reduce costs, improve sustainability, or help foster company culture – which leads to a tailoring effect, but there are a myriad of hybrid working models (which are often being honed to fulfil a diverse set of employee preferences), while organisations are at varying levels of digital maturity, and sometimes feature markedly different cultures.

All of these factors – and more – can influence how digital and physical workspaces can best support an organisation's requirements to the fullest, and so form the basis of a bespoke approach to workspace solutions, optimally supporting objectives and ultimately improving profitability.

"Throughout 2022 the percentage of working adults reporting having worked from home has varied between 25% and 40%, without a clear upward or downward trend, indicating that homeworking is resilient to pressures such as the end of restrictions and increases in the cost of living."

Office for National Statistics, [Characteristics of homeworkers, Great Britain: September 2022 to January 2023](#)



“

In our future-of-work model, our employees get to choose their preferred work style. Given the outstanding success of remote work, we're not pressing for office re-openings. Instead, we're gradually integrating it as a part of our hybrid model. We're continuing to learn and adjust as building a great program to bring teams and employees together is incredibly important.

”

Matthew Saxon, [Chief People Officer, Zoom](#)



Trend 5

Cost- and carbon-cutting decision- making

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The fast-rising cost of gas and electricity is now impossible for any business to ignore, particularly in the context of current economic forecasts, so investment in reducing energy use is money well spent – especially given the necessary focus on sustainability to meet carbon reduction commitments.

Digitisation has been a significant solution for improving sustainability in all sorts of organisations for some years now. For example, our augmented print and workflow team regularly achieves significant economies for clients: it's not unusual for us to achieve cost savings of 20% by implementing our print solutions, and by printing less the organisation's carbon footprint (and energy bill) shrinks, too. That's not all, though, organisations can actually do more at the same time – it's perfectly possible to improve reliability, security and efficiency simultaneously.

“When the work from home mandate was in place in 2020/21 we saw print levels drop by a huge 90%, which saved a lot of paper, ink and electricity,” says Stephen Todd, Operating Board Director at Aura. “Since more organisations have headed back to the office, whether fully or using a hybrid work model, we've seen lots look to capture these improvements, to decrease their expenditure and reduce the use of resources, as well as achieve other associated benefits including better productivity and an improved employee experience.”

“ An office with 100 people (7,500 – 9,500 sq ft) in would cost a total of £34,854 per year [for electricity], with air-con costing as much as £10,100 a year. ”

[Finder.com](https://www.finder.com)

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Remote and hybrid working models – made possible by digital technology – also facilitate another significant economy in an organisation's carbon footprint, since it's no longer necessary to have a physical workspace that's large enough to fit everyone inside at the same time. It might even be an option to flex space according to requirements, by closing certain zones of a building when occupancy levels are low. It's certainly possible to optimise thermal comfort for those on the premises, while keeping heating and cooling energy use to a minimum, by grouping people together in zones, controlled by the room and desk booking system. Even turning down the thermostat slightly overall can have a huge impact – last December the BBC reported that [Deloitte](https://www.deloitte.com) would be turning down the temperature in its 22 offices by 2°C, which was expected to result in savings of £75,000 for that month.

It's not just about the building's costs and carbon footprint, either. Business travel and commuting can be minimised, for significant carbon savings. With technology enabling effective online collaboration, meetings, and even livestreamed events such as 'town hall' meetings and conferences, the possibilities for achieving what needs to be done without the costs (both monetary and in terms of carbon) of everybody involved travelling to the same location have broadened significantly.

We're predicting this drive to improved sustainability for economic as well as ethical reasons will remain a focus for businesses of all sizes, and across all sectors, for a long time to come.

46%
of electricity in businesses
is used outside of standard
operating hours.

[British Gas](https://www.britishgas.co.uk)



The Aura solution

Aura is the only workspace specialist in the market to provide a complete end-to-end, integrated service, ensuring maximum benefit in the outcomes delivered, with minimum hassle. We take care of the entire workspace transformation project to enable all stakeholders, from the executive board right down to the organisation's newest juniors, to focus on their own roles and deliverables, throughout the change process. Our holistic approach means that all our consultation is done with execution in mind – we know we will be the ones who need to deliver on our promises.



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