

HUCKLETREE

2020 STATE OF THE NATION

THE NEW WORK MINDSET REPORT

200+ FOUNDERS AND
STARTUP TALENT ON
THE EIGHT-MONTH
WORKING FROM HOME
EXPERIMENT



2020 HUCKLETREE



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The last eight months have been a global working from home experiment.

The COVID-19 crisis has impacted every single business and industry on earth, including our own, and forced founders, agencies and startups to rethink their work patterns (and beliefs).

As a generation, we're experiencing a major cultural shift in how we work, and a psychological shift towards how we work together, too.

Our own team stood at the forefront of this. Like so many others, we weathered the initial shock of transitioning from HQs to kitchen tables, we were forced to get comfortable with uncertainty and uncertain timetables, and we worked out how to balance navigating culture and making key business changes virtually.

It gave us an idea. We have always looked to our members to inform how we think about work in the present and the future. We realised we could learn from the experiences and perspectives of some of the most ambitious companies and get closer than ever to the issue, of not just workplace but work mindset.

Over 200 members, founders, investors and contributors within the innovation ecosystem got candid about their experiences of working from home and working back in our spaces. They weren't shy about sharing the good, the bad and the weird.*

We want these findings to help teams of any size adjust to the reality of work as it is today, to help you engage your workforce with the right questions and perhaps rewire some of the old and stunted beliefs around where and how you work. Shoulds and musts no longer apply.

Here it is: The New Work Mindset Report. Read it, share it, tell your friends.

Gaby & Andrew

*Shout out to the respondent who summed it all up: "F*ck lockdown". We owe you a beer.

A NOTE ON THE DATA

Back in March, the way we work did a complete 180. It was an almost overnight transition from physical presenteeism and office-based working culture to a remote working setup and working from our kitchen tables. Up to this point, the feedback we'd heard and shared about the major changes to our daily lives was purely anecdotal, so we wanted to know what the data could tell us.

About the Respondents

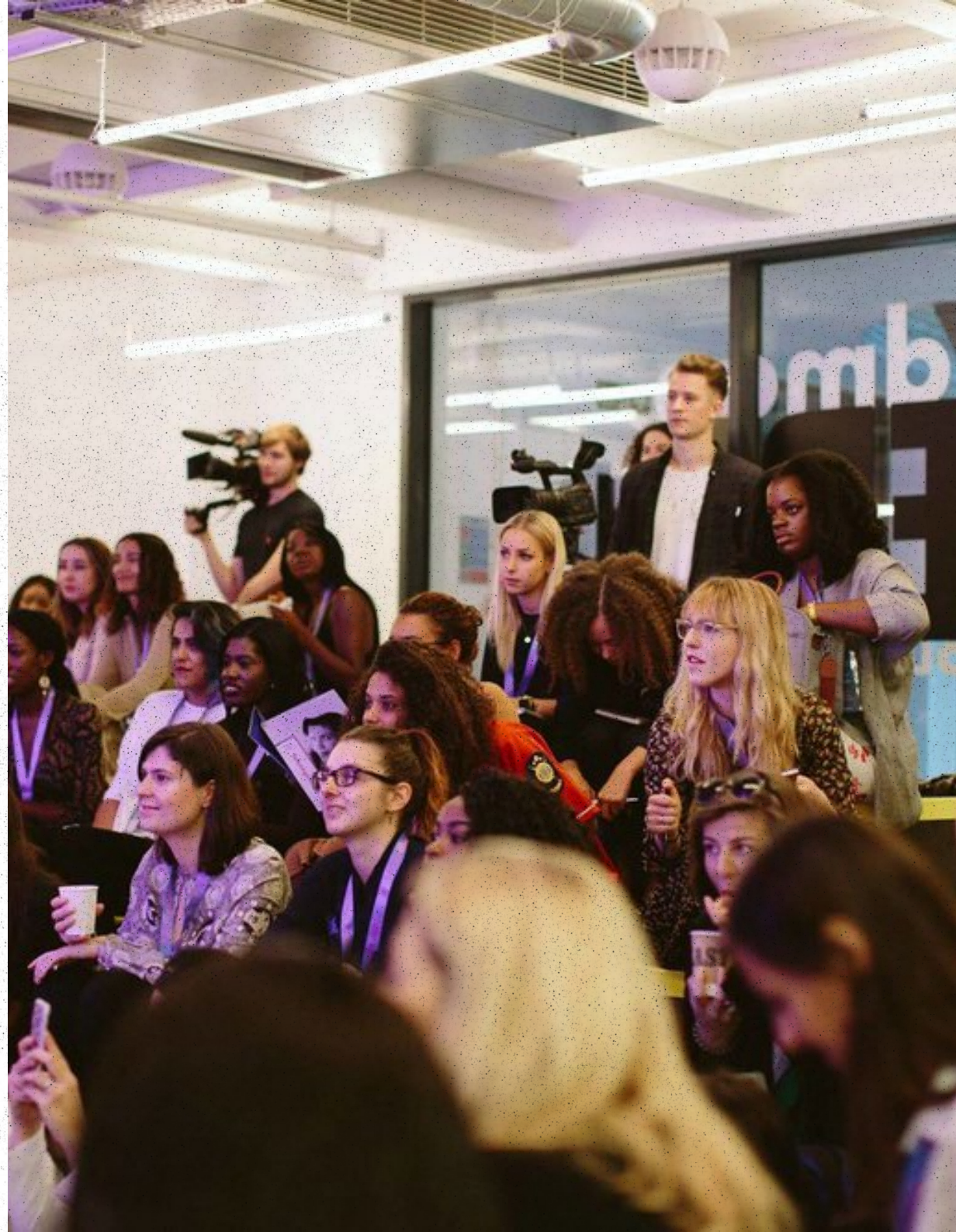
We heard from 215 founders, startup talent and corporate minds across the UK and Ireland. For us, it was especially important that we captured the insights from the innovators and entrepreneurial voices who would be hit the hardest by COVID-19 and who would need greater support from companies like ours to reinvest and rebuild what was broken.

- 1) 47% work for businesses with less than 10 people
- 2) 36% work for businesses between 11 and 100 people
- 3) 17% work for businesses with above 100 people

The survey covered 4 main areas:

- 1) The working from home experience
- 2) Relationships
- 3) Burnout
- 4) The future of work and whether we could define it

This is what we discovered...





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Blurring the Lines

'79% OF US HAVE EXPERIENCED SCREEN BURN FROM WORKING FROM HOME'

One universal truth in 2020: our perception of a normal working routine has shifted. We've moved from the staccato experience of a twice-daily commute, ad hoc Pret lunches and escaping to our favourite breakout space, to a blended home and work life which revolves around the kitchen table/sofa/bed/repeat.

Pre-COVID, the home offered a physical and emotional place that rarely blended into our working lives. Work felt far easier to compartmentalise, with the office creating a physical barrier between two parts of the same whole. Since two lockdowns have come into force, widespread working from home has blurred those lines and left it to individuals and companies to reactively restructure that barrier, often with little insight on how to do it.

Picking up the slack

"47% OF THE NATION TOLD US THAT SINCE THEY BEGAN WORKING FROM HOME REGULARLY, THEIR HOURS INCREASED"
(Fig. 1).

That might sound like a real boon for employers up and down the country, and it is in some ways - in the short term. Across the

innovation ecosystem, startups have had to leverage their already agile mindsets and methodologies to quickly forgo their set plans for the quarter, and then the year. These swift changes, coupled with vast swathes of the working population furloughed, has meant that the slack has to be picked up somewhere.

"People are working harder than ever," said Taymoor Atighetchi, Founder and CEO of London-based stationery startup, Papier. "That's driven by the fact that we as a business really ramped up the effort. We were working to protect the business, and we jumped at every opportunity we could. But that's not sustainable, and for any team, you can't sprint all year."



FIG 1

What have you enjoyed most about working from home?*

1. No Commute.....	87.6%
2. Having a better work-life balance.....	54.5%
3. Being more productive with work.....	47.2%
4. Being with Friends/Family.....	41.0%
5. Health, Wellness, Fitness.....	38.2%

What have you enjoyed least about working from home?*

1. Not having enough space.....	87.6%
2. Poor working facilities.....	54.5%
3. Working longer hours.....	47.2%
4. Being less productive with work.....	41.0%
5. Drinking more.....	38.2%

*Multiple select questions

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These added pressures and increased workload are taking their toll. Since starting to work from home eight months ago, around half (49%) of The Nation have since experienced burnout (Fig. 2). It's a massive learning curve and one that employers need to take both notice of and action on.

Productivity over everything?

Lockdowns haven't been doom and gloom for all workers. 59% of The Nation felt they've been more productive since they started working from home. At a time when many businesses have gone into crisis mode, a large proportion of their workforce has felt able to get their heads down and accomplish their workload.

This increased productivity is partially a factor of an increased sense of time. Aside from removing the joys of braving public transport or hunting down a parking space, the lockdown-induced lack of commute has proved a massive unlock to lockdown. In fact, 87% of The Nation told us that it was one of the things they've enjoyed most about working from home. It's hardly a surprise as commuting

was always a begrudgingly accepted characteristic of working life - it's expensive, time-consuming and draining. Nearly half (48%) of The Nation was commuting over an hour and twenty minutes every single day. Cut that from your daily life, and you've saved two of the most valuable personal resources: time and money.

While for many the crisis has

sent teams into rally mode (even our own company ran moonshot innovation challenges and bi-weekly socials), there are concerns around how you can sustain this productivity in the long run and the impact on abstract, creative thinking without exposure to the outside world.

On the flip side, many others (41%) told us they were less productive working from home.

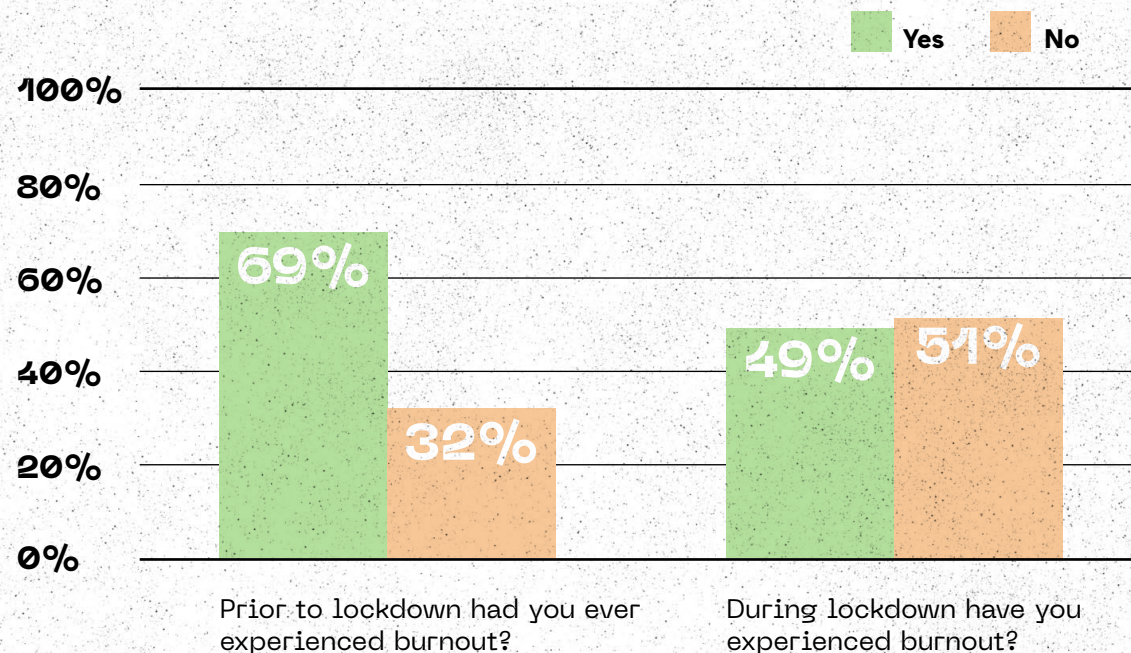
Far from being a break from the distractions of the office, working from home has removed much-needed structure from many of The Nation's lives (and even introduced a whole new set of distractions). Our individual productivity when working from home depends on a number of factors: economic wealth, mental wellbeing, the neighbourhood you live in, who you live with, how much space you have,

whether or not you have small children around and how well you can communicate with your colleagues remotely.

Living at work, without the perks

Aside from domestic strife, one of the biggest issues facing the newfound home-based workforce is a lacklustre setup. It's all well and good putting a solid 9 or 10 hours in when you're sitting

FIG 2



in an ergonomic desk chair, at a desk aligned to your height, with considered lighting, heating and air-con and free snacks. However, most of us just don't have a working space anywhere near this level in our home.

53% of The Nation told us that not having enough space was one of the worst things about working from home. This is not just your immediate workspace, this is breathing space. For many households, it was impossible to avoid the inevitable distractions



of others - and it wasn't just the feeling of working in close quarters with the people you live with that they found tricky. 50% experienced physical pain from their desk setup - that's if they had an actual desk at all (shoutout to all the bed and sofa workers). It's a vital consideration: office chairs are designed to be sat on 8 hours a day, kitchen chairs are not.

The big learning

As we've learnt from The Nation, much of the workforce feel their workload has become relentless since starting to work from home in March. While this has allowed businesses to pivot and survive, keeping up the current levels of output just isn't sustainable.

1) Beat burnout - employers need to find a way to measure levels of burnout in their teams, and take action to stop the wave before burnout drives dissatisfaction and disengagement. Budgets for home office equipment, clear guidelines on working hour expectations and regular one-to-one check-ins are all key. Unaddressed, burnout will continue to build and build, especially as sporadic lockdowns may continue to be enforced.

2) Slackers vs Stars - employees have stepped up, taking on tasks usually outside their remit and juggling the increased individual responsibilities of a scaled-back team. It's a time for superstar talent to self-promote and show what they can do, and the start of new progression plans, but make sure teams have realistic expectations around what's achievable with timeframes, budgets and resources.

3) Flexibility as a mindset - enforcing a blanket WFH OR office-centric policy is too rigid and likely to fail. Individual productivity has either taken a big hit or massively boomed, so employers leaning towards a one-size-fits-all policy may find themselves alienating half of their team and not playing to the individual, collective and cluster strengths of their teams. Flexibility is no longer a policy, it's a mindset, one that must be embraced and practised to protect company happiness especially as we move through another lockdown and into the winter months.

4) Alternative workspace strategies - employers need to have open conversations about the setup and realities of working from home. Surveys, one-on-ones, pulse checks and WFH allowances could all help teams take some control of their living room.

Taking Culture Online

'89% OF US MISS OUR WORK FRIENDS'

When we first locked down, we also locked down many dimensions of our lives that were essential to how we self-identify, both at work and at home. Our empathy, comprehension and conversational skills were all tested as we saw less three-dimensional faces and more pixellated faces on Zoom. While hopping onto a family Facetime or team Google Hangouts was 'normal' practice, most of us have never had to use this medium to cover every spectrum of conversation - from quick hellos to complex problem solving - let

alone for eight hours a day, eight months straight.

Digital communication tools have been the saving grace of many businesses during COVID-19, and it's difficult to see how many would have coped had the pandemic hit 30 years ago. Zoom, Google Hangouts, Slack and the digitisation of events have meant that many have been able to pivot their operations online - but whilst business operations might be back on track, we need to consider its very real impact on company culture in the long-term.

Relationships with colleagues

We asked The Nation how they felt their relationships with colleagues had fared since making the move to working from home.

"40% TOLD US THAT THEY HAD BECOME WORSE - WITH JUST 19% SAYING IT HAD IMPROVED" (FIG. 3).

So, with the magic trifecta of Zoom, Google Hangouts and Slack at our disposal, where are things going haywire?

First up: the limitations of technology. It's relatively easy to run through a clear set of instructions over a video call (as long as you're not on mute). However, try actively collaborating, with a number of voices throwing ideas into the mix and riffing off each other and things get trickier. We heard red flags including the difficulty of taking social cues from people virtually, with far too much time spent wondering "is it my turn to pitch in?". This stop-start rhythm impedes free-flowing creativity and interrupts the essential

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chemistry and energy needed to really develop a pioneering concept or bold idea.

Leo Maclehose, Founder of MatchPint, the app that connects fans and pubs, said: "It's difficult to gain any levity from the work from home format, there's a collectiveness gained from working in the same space. During those longer nights, together, it feels like everyone's putting their shoulder in as a team. It becomes less of an independent strain as

the energy gained from being together as a team counteracts burnout. If you're having to work long hours at home there's no respite, but in a workspace, there's a lot of respite."

Aside from the effects of screen fatigue, communicating and brainstorming through the lens of a webcam has also meant we spend less time chatting about the small stuff - that essential small talk that's not necessarily related to work, but is a key

component in working out how best to communicate and maintain relationships with your teammates. To tackle this and maintain our strong bond, the Huckletree Marketing and Sales team started morning standups sharing positive news with each other.

Another big question: if 40% feel their existing working relationships have suffered by becoming primarily virtual, how on earth do you go about

building new ones? You can close a business deal or instruct someone over Zoom, but it's far more difficult to create a real connection when you're jumping from one Zoom room to the next. At Huckletree, we kicked off a series of Slack Donuts, randomly assigned pairings for virtual coffee meetups. Whilst it could never match eye contact and meeting face-to-face, it went some way towards bringing together teammates who might not ever interact in a working setting and was a touchpoint in keeping our team spirit thriving and connected from London to Manchester to Dublin.

Work Friends or Colleagues

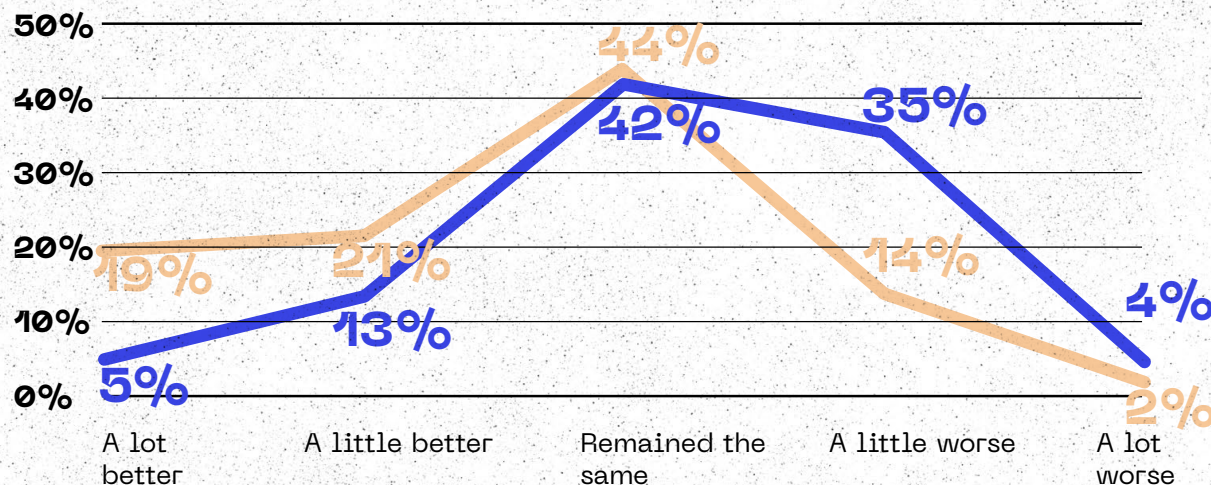
We've known for a while that no mind is an island, but this year we've proven it. When we asked The Nation what they haven't enjoyed about working from home, above all they highlighted the lack of socialising with colleagues and consequent loneliness.

"89% TOLD US THAT THEY MISS THEIR WORK FRIENDS: THE MOST ONE-SIDED RESPONSE ACROSS OUR ENTIRE SURVEY" (FIG. 4).

Off the cuff, ad hoc interactions help to break up our day, allow us to share and resolve stresses of the job and crucially, make work more meaningful and happy. Take this away, and carefully built workplace cultures and identities begin to erode. Work becomes just that: a function to perform. We begin to exist just to complete the jobs and tasks set out on a given day, lacking a purpose-led identity - something that is crucial to much of the workforce. For early stage companies, companies fundraising or for those who live alone and have been working from home, the lack of a social aspect to the working day is even starker. Regular

FIG 3

- Since working from home, do you think your relationship with the people you live with has got better or worse?
- Since working from home, do you think your relationship with your colleagues has got better or worse?



human connection is hugely important for our emotional and mental health, plus our sense of contribution and value, all of which feed directly into how well we're able to do our job.

Pre-COVID, businesses spent inordinate amounts of time and money cultivating a flourishing company culture. It's solid reckoning: if you build strong relationships with the people you work with, your overall output will be better. It's not just about team drinks on a Friday or having a laugh over lunch. Forming a solid bond means when it comes down to the wire, your team is prepared and fired up to push through together and emerge victorious. In a post-COVID, primarily virtual age, this is a major hurdle for employers to overcome.

MatchPint's Founder and CEO Leo MacLehose went on to say: "The biggest struggles we've had have come from maintaining the strong team culture we've built over the past nine years. It's felt like we've been on slightly borrowed time when we haven't been together. Because of the saved backlog of positive sentiment and company culture, people have continued to put themselves on the line and attack the challenges. However,

you can't depend on the bonds of people and the concept of camaraderie to drive positive united delivery forever. Those ties and company culture will begin to run thin as we lose our collectiveness."

While relationships with colleagues have suffered as a result of working from home, 42% of The Nation found their relationships with the people they live with had actually improved (Fig. 3). Lockdown has given many the opportunity to spend quality time with their loved ones (and get their work done), sparking a desire to reprioritise.

Ari Last, Founder & CEO of childcare app Bubble, said, "As with most things, balance is needed. More working from home and more flexibility is absolutely going to help working parents as it allows us to spend more time with our kids and, to an extent, reduces the enormous daily stress that comes with managing the painful logistics of how our kids are getting to school, getting home and generally being looked after. But there's a cost too. Working from home with kids around is stressful. You can easily fall into the trap of being more present, without ever really being

present. It can be the worst of both worlds, rather than the best. Ultimately more flexibility for working parents is a good thing, but we need to think carefully about putting the structures in place that help ensure it makes us more successful both at home and work."

While our working relationships may be negatively impacted, this is a big opportunity for employees to restructure their working weeks to spend valuable, quality time with their families and significant others. It's a shift that's been a long time coming

and after a concentrated taste during lockdown, one they're unwilling to give up any time soon. Employers will need to work with their teams to create working days that both allow for, and embrace, the unique demands and preferences of our personal lives. The result: happier, empowered employees.

The big learning

1) Disconnection from our colleagues, the people we spent most of our waking lives with, has had a very real impact on our happiness levels. Almost overnight, we had to adapt

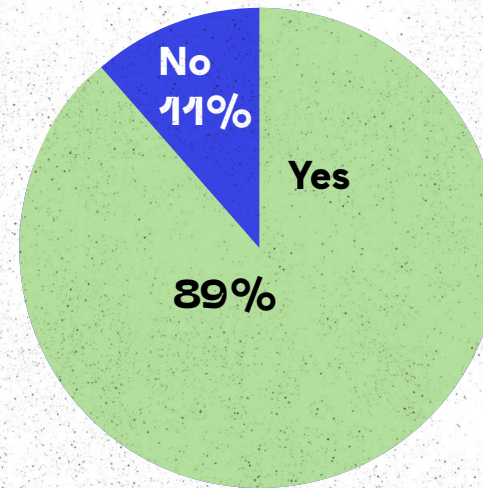
from ad hoc conversation to totally remote, scheduled communication with our colleagues - and it proved a difficult transition. Whilst widely available and (tech issues aside) efficient, Zoom and Slack are a poor substitute for face to face contact and conversation. Going forward in a post-Covid world, employers need to find a way to reincorporate safe, in-person interaction to bridge the virtual gulf in our working relationships. Look at tech breaks, screen holidays, opt for phone calls or distanced walks.

2) Working from home doesn't signal the end of the workspace proper. Employers will need to craft return-to-work plans that incorporate both home lives, whilst maintaining and building relationships with the people you work with. For now, balance looks to be the only answer.

3) Comprehension over communication - Throw out the old culture playbook and invest in a new framework that is not solely based on place. Ask your people how they are coping and adjusting and keep the conversations open, transparent and honest - things can be lost in slack translation.

4
FIG

Do you miss your work friends?



Beating Burnout

'49% OF US EXPERIENCED BURNOUT WHILE WORKING FROM HOME THIS YEAR'

Working from home has blurred the boundaries of where we eat, sleep, work, play and relax. We've found ourselves walking the tightrope between domesticity and professionalism. With no physical separation between the two, it's become all too easy to log on before the working day properly starts, and difficult to shut down once it's ended. With the latest Tesco delivery waiting in the kitchen, we miss out on those quick trips to the shops that help to break up the working day.

Constant work, lack of social breaks and a feeling that you're never really apart from your job have begun to take its toll on the workforce. Simply put, it's been far harder for people to separate their work and home lives when both are happening in the same place. We've lost the art of disconnection at work - and burnout is looming large.

Broken boundaries

49% of The Nation said that they have experienced burnout while working from home. That's big,

considering we're only talking about a period of half a year. Working from home hasn't meant we've waved goodbye to the stresses and strains of the office. With social outings and holiday opportunities limited over the past months, we've lost our means of unwinding and re-energising. Many employees haven't felt able to take a proper break, and this has taken its toll on half of the workforce. It's rife, especially when compared to the fact that just 20% more people had experienced burnout previous to lockdown (Fig. 2).

An inability to switch off was one of the most common struggles for many, and we've seen this in the comments left on our survey. Finding that time in the

evenings to recharge is such an important factor in maintaining a healthy working life, and that's not something that a number of people have been able to do since working from home. Even among the 59% of people who felt they'd been more productive at home, 43% of them still felt they'd experienced burnout since lockdowns began.

Jean Phillippe Doumeng, Executive Director for Business Development and Partnerships, Babylon Health said "This year, our mental well-being and resilience has been tested. The more we work from home for sustained periods of time, the more we're faced with 'isolation' seeping into our work lives. This is creating a complete new version of burnout.

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We'll see more people jump onto online counselling and healthcare apps to help cope and navigate the uncertainties, and I imagine more companies will need help in how to recognise the signs of employee stress and fatigue."

It's this absence of a physical barrier between our work and personal lives that's been the root cause of burnout since the beginning of the first lockdown. 55% of The Nation told us that returning to their pre-COVID routine would decrease their chances of experiencing it.

Screen fatigue

There's been a cultural shift in how we communicate with each other. We've talked about this before in this report (and we'll talk about it again) but you can't completely alter the structure of human communication and relationships and expect there to be no adverse side effects. After half a year spent staring into the seemingly endless void of Zoom meetings and Slack messages, we wanted to know if The Nation recognised screen fatigue as one of these side effects.

79% of The Nation told us they'd experienced screen fatigue since the initial lockdown (Fig. 8). It's

a common experience - being unable to escape screens during working hours or break up their days without them. How many of us watched Netflix during our lunch break or jumped on a Zoom call with our friends straight after work hours? It's endemic in our day to day.

The situation looks more stark held up to the burnout figures. 85% of the people who said they'd experienced burnout while working from home also said they also suffered from screen fatigue. Similarly, 87% of people who said they didn't maintain a healthy work-life balance when working from home said they also experienced screen fatigue. It's clear that the prominence and inescapable nature of screens weighs heavy on our wellbeing.

"No two people will necessarily experience burnout in the same way," says James Naylor of Livitay workplace wellness platform, "and it can impact everybody differently. It can also be hard to define it when you experience it and I can only speak from my personal experience. For me there were early symptoms - I was a bit more irritable and would generally feel more anxious. At this point, I didn't really notice

it myself but I'm sure the people around me did. I started to realise when I started to feel more fatigued, would struggle to sleep in the evening and then only wanted to sleep during the day."

The big learning

1) Experiences and expressions of burnout are different for everyone, skill yourself up on the signs and educate your team on how to recognise them - as many may be operating at 100% burnout and are entirely unaware. Offer support services, mentors or a buddy for your team members, and make sure your

people have access to mental health and wellbeing services.

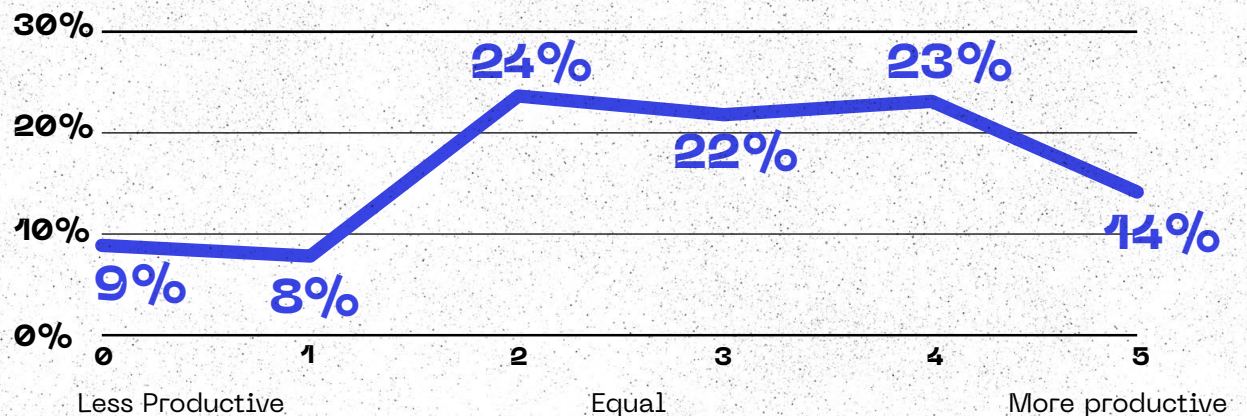
2) The watchout is that working from home experiences can drive a new type of isolation, and depending on sector and role, a long-term slowing in productivity and creativity, which can fuel a greater sense of isolation. Out of sight does not mean out of mind, and what works one week may not work the next. Offering access to home and an office or shared workplace base is an easy start, and means team members can move back and forward as projects ramp up or as personal

circumstances shift.

3) If you're an employer be aware and proactive about beating burnout, don't wait for the houses to come crashing down before you step in to do something. Open dialogues, transparency and giving employees the headspace to be able to escape work both during and after working hours is essential. With 49% of us experiencing burnout while working from home, this issue is something that is happening right now and is at risk of worsening during the winter months.

FIG | 5

Have you been more or less productive working from home?



The Future is Flexible

'79% OF US ARE LOOKING FORWARD TO RETURNING TO WORKSPACES'

To return or not to return, that is the question. Perhaps the strongest barometer for understanding the current state of work is to learn how readily people are prepared to return to workspaces. As we all continue to navigate an undefined 'new normal', anecdotally we feel that we want to return to workspaces but only under certain measures, which have led to a whole new world of demands.

Amid signs of a permanent shift in working culture, we researched

current sentiment around returning to workspaces. People are anxious about the safety of the community but they're also not quite ready to move to a more localised way of living, with only a small proportion of people looking for workspaces closer to their homes. From our research, we still seem prepared to travel into central business districts to reach workspaces but half of us do feel anxious about doing so, with very few currently opting to use public transport. People are looking for an impossible

solution: flexibility, proximity and hours that work for them, but where does that leave businesses trying to keep plans on track?

Returning to work

When surveying The Nation we wanted to know the feeling and sentiment towards returning to the workspace. 79% of the nation showed net positive sentiment and are looking forward to being back in, at the desk (and we're very proud to say that 85% of Huckletree members are looking forward to working from our hubs again). But when we dug a little deeper into this, we discovered that the benefits of working from home - the comforts, identity and familiarity - only worked if the conditions were just right.

Returning to the workspace does not mean returning full time for everyone (Fig. 9). Given that most of us generally felt positive about working from home, it's not a surprise that a large majority of The Nation want to experience the best of both worlds and be in workspaces 2-3 times a week. Many of our respondents told us that they felt that they worked in different ways when at home versus office environments; and in fact, breaking up the week helped with time and project management and gave themselves space and time to get deeper work completed. Also shown in Fig. 9 is that employers are currently also expected to meet these needs, as most individuals expect to be in work almost exactly as much as they

would like to be. This puts even greater pressure on employers to be flexible and for employees to be communicative.

Elizabeth Bisby, COO of OBI said: "Workspaces are a place for collaborative creativity, they unite people and technology to boost productivity, creating a culture where people can grow, learn, and socialise; something that can't be created when working remotely. People enjoy the flexibility of working from home but equally enjoy the benefits of a workplace. Both environments have different benefits and employees now crave a balance of both with wellbeing in the workplace being one of the strongest trends throughout our own surveys."

When asked what workspaces could do to ease anxieties about returning to work a few respondents said they would like to work flexible hours and ensure there was control on the flow of people, however, most of the answers were about cycling facilities and having a workspace closer to home. Interestingly, workspaces weren't seen as the priority problem, it was safely getting to them that was more of a concern. Read on!

Commuting in comfort

We also asked The Nation how anxious they were about having to commute to their workspace, and opinions were extremely split (Fig 10). 32% of people were fearless, saying that they had no anxieties at all about commuting and overall 53% had a net positive sentiment about commuting. Whilst the other 46.7% had a net negative sentiment about commuting, when cutting the data, most of this proportion were using public transport before the COVID-19 outbreak.

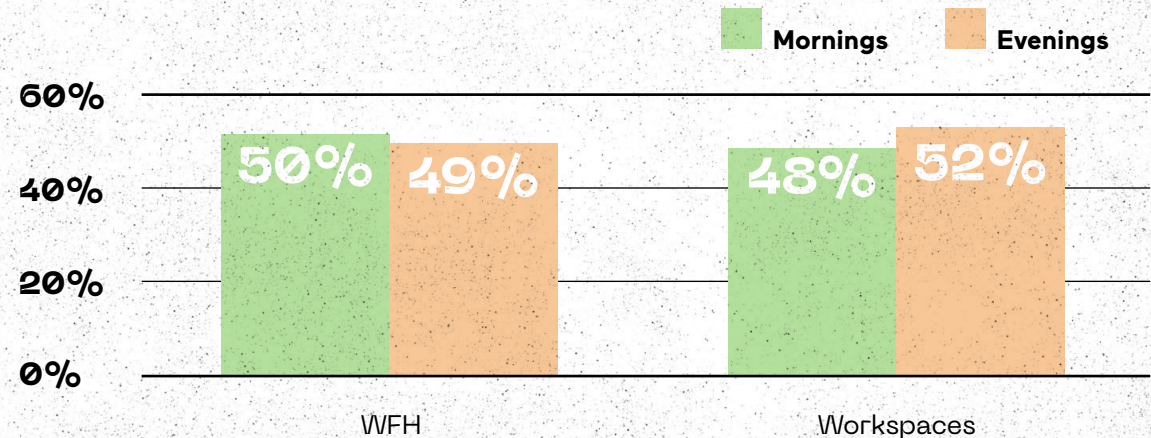
More than half of our respondents (62%) were using public transport before the COVID-19 outbreak, now only 7% are planning to once they return to work. And of the 62% that previously took public transport, 59% of them are now planning to cycle instead. The surge in cycle commuting as we continue to be discouraged from using public transport has seen UK Cycle to Work scheme bike purchases double in June.

However, despite around half of The Nation feeling anxious about commuting to workspaces, only 21% of them have been considering different workspaces

closer to home to ease this anxiety. Of those who were considering different workspaces, the majority of them (43%) lived between 40-60 minutes away from their current workspace; and 63% felt anxious about commuting. Similarly, it's also notable that there is no discernible difference in commuting anxiety between those who had a long commute and how anxious they felt about commuting compared to the average.

FIG 16

When working from home, do you typically have more energy in the morning or evening?



Learning to walk all over again

Considering the data shown, it does feel like flexible work has had a large, mostly successful uptake. And it seems that, under the right circumstances, most people would like to continue to work from home 2 to 3 times a week. It does seem that we've very quickly come to a crossroads, as The Nation values physical and social interaction extremely highly and so are unprepared to work from home permanently.

This preference is in spite of the fact that this may mean having to commute for over 2 hours a day. We would push for repeating this research in a year to understand how prepared we are to move to neighbourhood localised work models and determine whether The Nation is looking for social interaction with their colleagues, or feel they can effectively fulfil this need with a community-focused, flexible workspace such as Huckletree.

The big learning

1) Time on our side - teams need to think about time differently. Hours in the day are not the same as productive hours. How someone works in the morning is very different to their attention span and productivity in evening. It's clear that a demand to return to workspaces exists - but don't think it's all or nothing. Companies: consider carving out flexible personalised packages

per team or department as a great way to start. We're talking structured plans with flexible thinking.

2) Go your own way - commutes are now a major part of workplace design. Cycle to work schemes, private parking and cycling facilities, as well as public transport subsidies will now be a part of employer handbooks, not just an added benefit. Employers

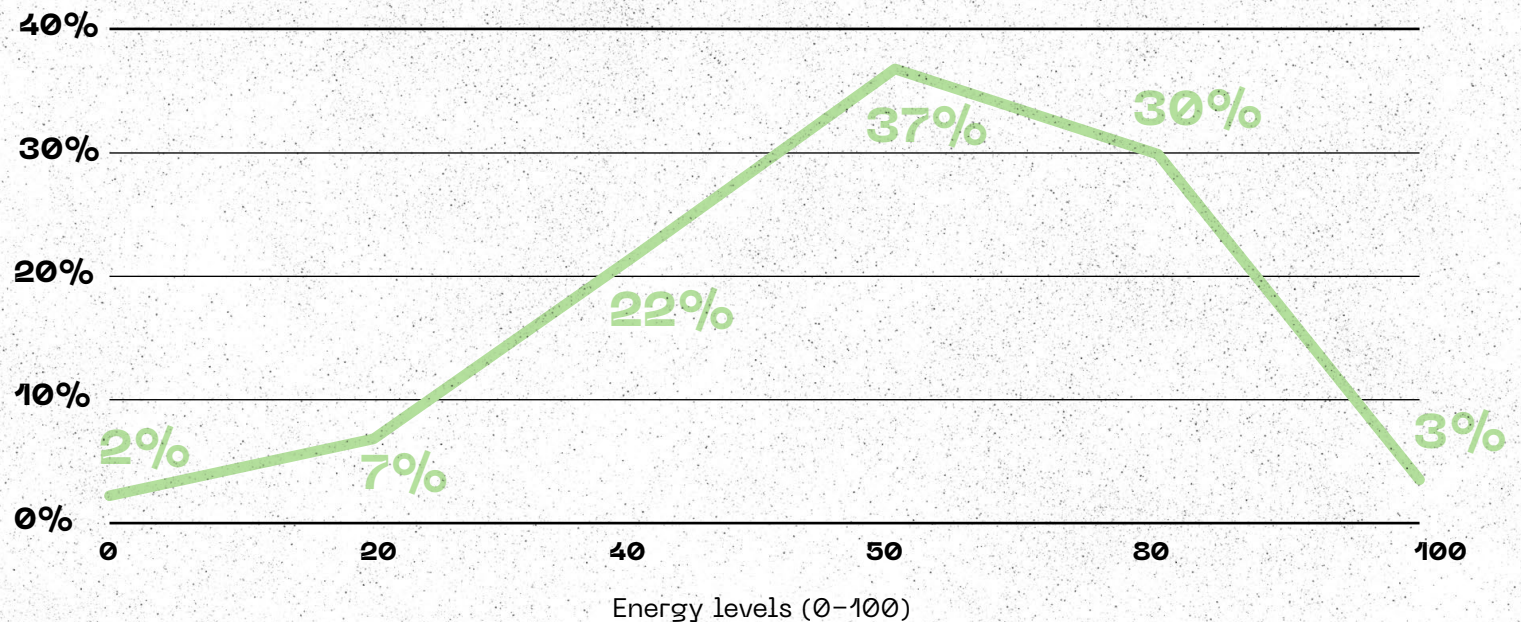
should recognise this will be a big sway for teams wanting to return to workplaces and spaces that safely provide bike parking, locks and storage may win out.

3) Hello Neighbours - local neighbourhood hubs may become as popular as city centres as workers gravitate towards regional areas and boroughs near to their home addresses. That doesn't mean city centres or tech

hubs are redundant, however the role perhaps shifts towards being HQs for collaboration, ideation, showcases, demos and presentations and less about the day to day work. Managing expectations and creating clearer defined purposes for places of work, may help teams transition smoothly, keep productivity high and keep overall costs of commuting and office usage down.

FIG 17

How would you rate your current energy levels?



Owning the New Mindset

'88% OF US WANT TO BE IN WORKSPACES AT LEAST ONCE A WEEK'

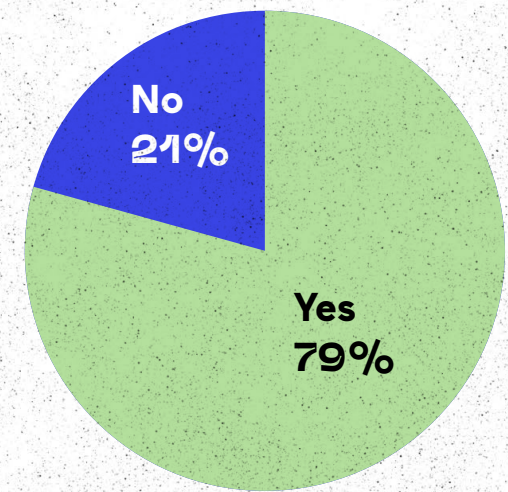
After reading through every data point and insight, it's clear that people are expecting a high level of flexibility in how they work in the future, however they may not know how to co-design a new working routine with their employers. Here's our take on how teams can love and own the new work mindset.

49% of The Nation experienced burnout. That's 49% too many. It's no surprise that those who managed to support a well rounded working life were also

less susceptible to burnout. Here we call for employers to take proactive steps to recognise new signs of burnout e.g. constantly switching video mode off, no meeting breaks, longer working hours and increased screen time. Instead, they should offer their teams the option of structured check-ins, mentoring, invites to 'free thinking chats' and collaboration sessions. Plus, those who did not experience screen-fatigue also reported a healthy work-life balance. Screen time is a necessary evil for the

FIG 8

When working from home, would you say you have experienced screen-fatigue?



remote generation but there needs to be some pretty clear rules around how it's used for good. We suggest keeping working hours to shorter blocks, encourage people to look up and stretch between

breaks, opt for audio-only calls or walking meetings, use pause notifications status often and get your team to self-monitor their screen time each week.

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All things are not made equal. 53% of our respondents said that 'not having enough space' was one of the worst aspects of working from home, whilst 49% also said that they had experienced back pain from poor working conditions. 12 months ago, we weren't thinking about how our monitor would fit in our kitchen and whether the workstation in the corner would get enough light. Many of us simply cannot afford the extra space or even be able to move at such short notice - especially with employment uncertainty at such a high. A full move to working from home would be detrimental (and not possible) for everyone outside a particular salary band, and if this were to become commonplace, we may see workspaces being used by just those in junior and mid-level roles, without the exposure to more senior leaders. While that might sound like a brilliant scenario at first glance, the long-term impacts to learning, development and career progression could be far from shiny.

Over 88% of The Nation said that they would like to be working from workspaces 1 or more days a week. With so much uncertainty in the air, the point here is to

go slowly. Empower your team to be 'in' when they need to for collaboration, meetings and company sessions but make sure there are structured guides to help them make that decision. For our own team, we offered a three-tiered work plan (1) work from home, (2) work from our spaces, (3) work together. We asked our teams to choose a HuckleTree space nearest to their home to avoid any longer commutes on public transport and invited central teams together in one space for an all-in company day each week. Remember, you want your people focusing on how to show up, not where to show up each day. We can expect more regional workspace hubs and neighbourhood branches to pop up designed for teams to have 50-50 in-person and in-virtual work setups.

We also observed in our Report that 79% of The Nation were looking forward to returning to their workspace or office. While heading back in is a symbolic 'restart' for many businesses, we discovered that it is also a chance for people to transition back to their professional personas, strengthen social relationships and use their whole selves to communicate, express and

collaborate (hello, eye contact).

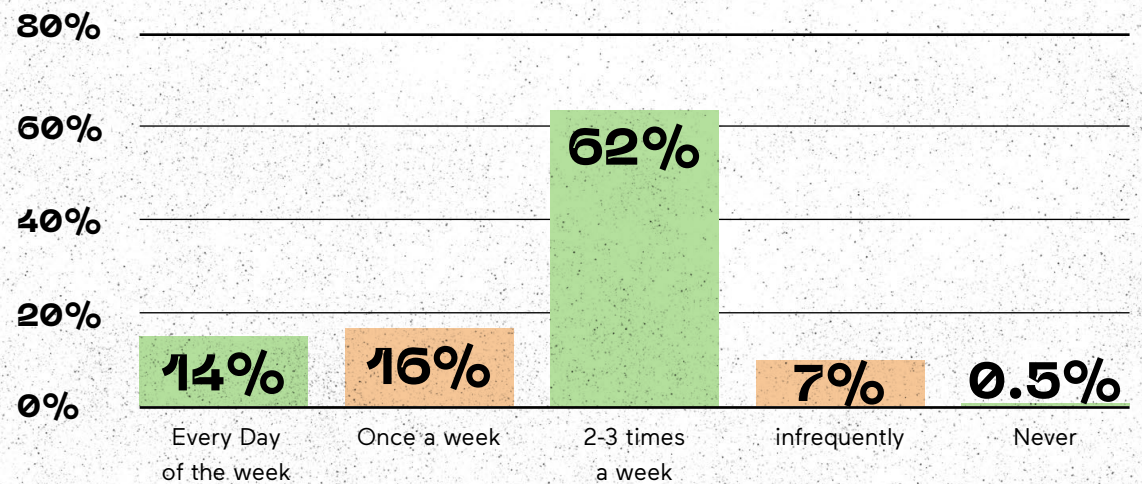
89% of The Nation said they missed their work friends. This is not just about missing weekend chats, this points to a greater need to be understood and belong. We expect to see shifts in the way companies design and nurture company culture. Having a clear

mission that everyone is behind is one of the top three reasons for ensuring team members feel a sense of belonging and community, however how do you translate this beyond a corporate video? Companies need to think about where this sense of culture 'lives' and more importantly, how it behaves online. Email,

Slack, Zoom and Hangouts can start to feel like a lonely abyss of misinterpretations and muted silence if not managed well, and without a safeguard on tone, responses can be taken out of context. Think carefully about the tools you use and be clear with your teams about how they can use them in the right, productive way.

FIG 19

How frequently do you want to be working from home in the future?



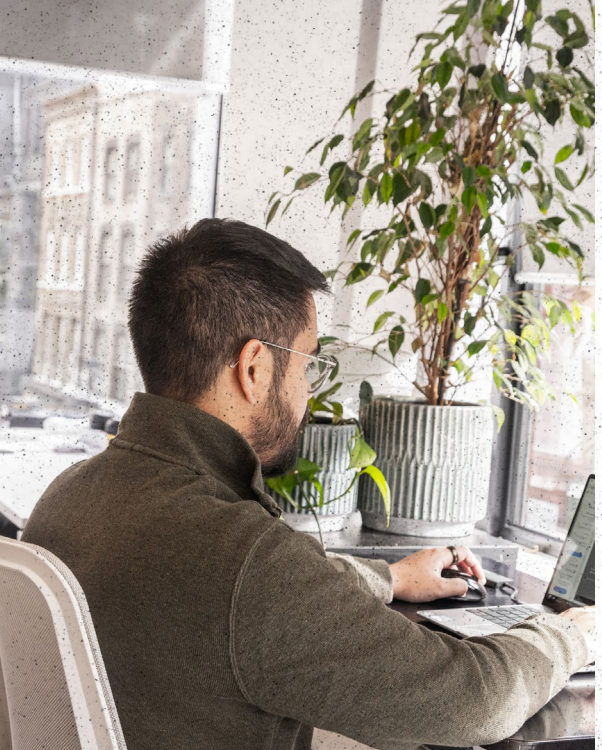
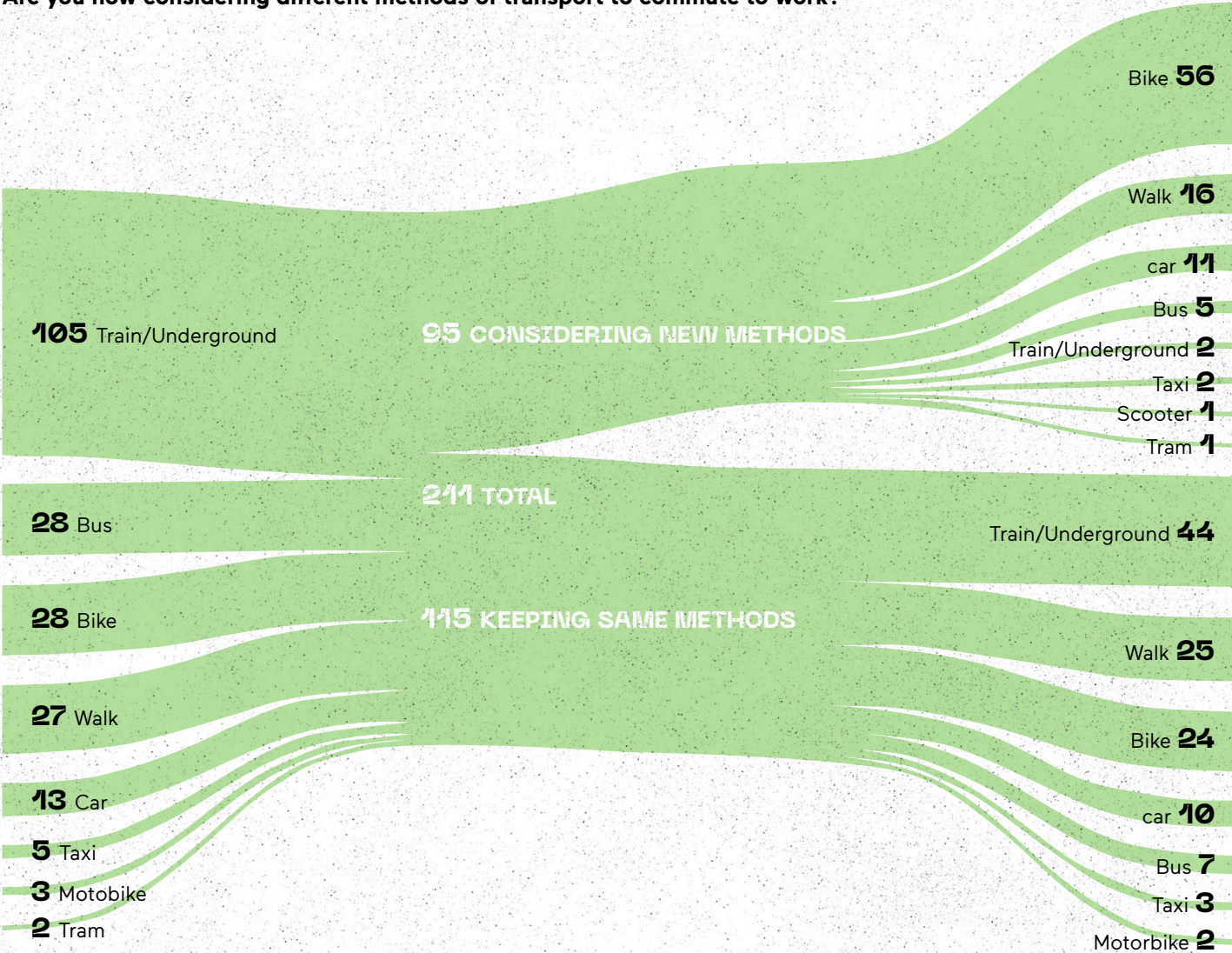


FIG 10

Are you now considering different methods of transport to commute to work?



We asked, and you answered. Thank you to everyone who took the time to contribute to our first The State of the Nation Report. With your responses, we've been able to build up a snapshot of our collective experience of the past eight months and actively help teams transition to a new type of work.

Data is not helpful when it sits on a page. If we're to action one learning from this report, let it be this: our mindset towards work needs a total rewrite.

Those who blanket working from home as the solution are not looking at it through the lens of productivity and pace. Working from home is fantastic when you have deep work to do, when you need to switch off notifications and build out a plan. It is for reflection, introspection, and requires a lower dial of energy, while our workspaces are about high energy, speed, impact and decisiveness. Different environments suit different types of work. Giving people one sole option is like saying use the bus as your only way to travel; it doesn't work in every scenario. The faster employers recognise this, the faster they will accelerate any internal ambiguity and win back the trust and credibility of their workforce.

We've had to rethink the very model of Huckletree and the true role of physical workspaces in a COVID-19 world. Over the past eight months, we've ripped up the workspace rule book and totally reimagined what we do to suit how our members work, not where they work from, and to be a space for work of the present, not just work of the future.

It's ironic that coworking was once upon a time a response to the isolation of modern work. Through the last eight months we have become even more isolated, which means we need our industry to come back fighting with bigger ideas on how to solve isolation and drive productivity. The impacts of isolation on the livelihoods and businesses of entrepreneurs, the very people we're reliant on to drive growth in an economy, is terrifying. This is why we're committed to rebuilding an ecosystem that is used to taking risks, betting on intuition, trading on social capital and karmic giveback to help them continue to do just that.

Craby & Andrew

Huckletree Co-Founders



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REPORT