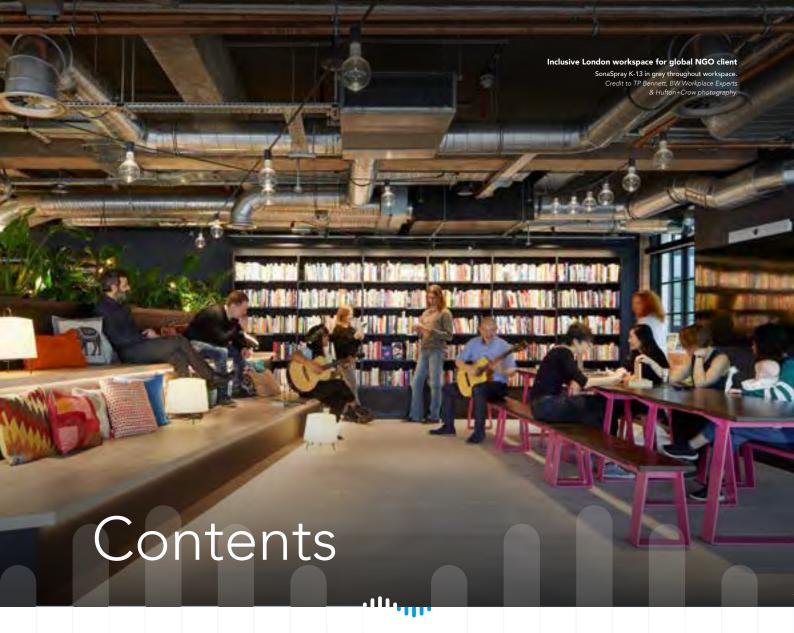


# WHITEPAPER

The Nation's Productivity Pitfall





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# Introduction

Expedited by the pandemic, hybrid working has quickly become the norm for UK businesses and beyond. Alongside this new style of working is a new type of office space. It's now mission-critical for teams to have areas where they can collaborate, as well as room for quieter spaces that allow more focused work.

As a result, its popularity is increasing demand for premium office. Driven primarily by financial and professional services firms keen to 'level-up' from pre-COVID conditions, it's creating a 'better office boom'.

However, offices failing to meet the new required standards are falling by the way side and lower quality buildings are now at risk of becoming stranded assets.



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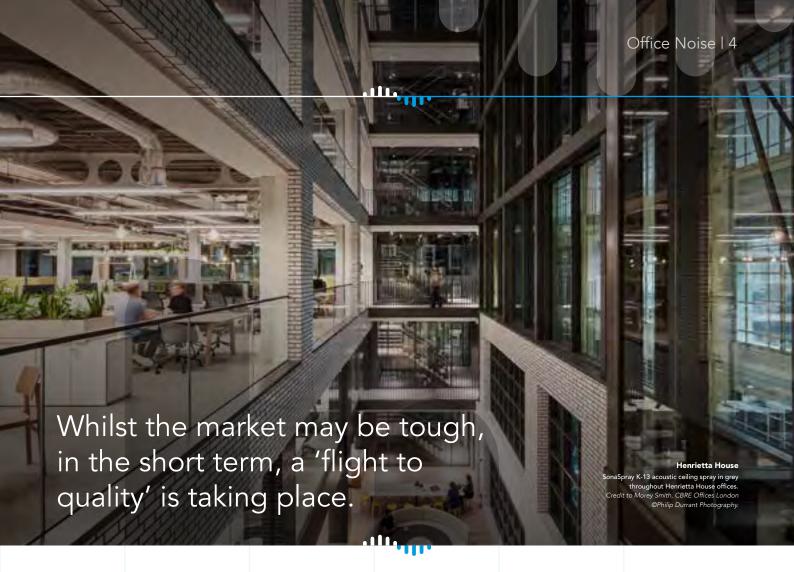


Over half of employees believe their office is too noisy, impacting their health, productivity and performance. Yet despite the high price tags and glossy aesthetics in the premium sector, are businesses getting what they need from their workspaces? Research suggests that the answer is no – and the issue is in part, due to noise levels. In 2022, Oscar Acoustics found that over half of employees believe their office is too noisy, impacting their health, productivity and performance.

To further complicate matters, building owners are under pressure to improve energy ratings. New legislation, in-line with Part L Building Regulations, is pushing for commercial spaces to lower their carbon impact. This means that by April 2030, all offices must reach 'Grade B' EPC (Energy Performance Certificate). The issue is that an estimated 85% of current office stock falls short of these <u>targets</u>. In fact, according to real estate experts, Savills, it could cost landlords upwards of £40 per square feet to hit <u>proposed</u> <u>legislative energy targets</u>.

A building's carbon footprint is also becoming increasingly important to sustainability-minded businesses. For commercial building owners, the landscape is becoming a 'redevelop or die' situation – and large amounts of investment will be needed to bring structures up to scratch.





JLL's global market reports predict that, towards the end of 2023, quality will begin to supersede quantity. For the many buildings falling short of acoustic greatness, this presents a unique opportunity to fix a long-standing productivity pitfall – excessive noise.

These variables are shaping demand – businesses want reduced operational and energy costs alongside healthy environments that support employee performance. It's the reason why environmentally-focused commercial spaces, such as those rated BREEAM Outstanding or Excellent, command a 20% premium and stand vacant for less time.

However, despite claims by many premium office spaces to provide 'top-end specs', unless the right acoustic solutions are in place, businesses will continue to see their bottom line impacted by poor productivity.

In this whitepaper, we'll explore through exclusive research, why acoustic design lies at the centre of business success. In particular, the report will examine the impact of noise on workers and how it can significantly alter individual performance. Against a broader backdrop of white-collar business trends, we'll also look at the changing role of the office workspace – how it can add immense value to both staff welfare and the cost of a rented space. Importantly, it will show why the £63 billion needed to meet energy targets present a once-in-a-generation opportunity to overhaul office spaces and stamp out excessive workplace noise, once and for all.



# The Lived Experience

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In order to better understand how our offices are performing, we issued a study of employees in the financial and professional service sectors. It revealed that office spaces are significantly underperforming – not just in terms of acoustic health, but in workplace productivity and staff satisfaction.

Most surprising was the widespread impact of excessive noise – 8 in 10 believe that too much workplace noise is negatively affecting their productivity. At a time of significant economic challenges, this statistic shouldn't be overlooked – excessive noise could be preventing UK businesses from improving their bottom lines.

Delving deeper, the study found that over half of employees (52%) had difficulty concentrating, leaving them feeling irritated and unfocused (43%). For well over a third of workers, this led to delivering poor quality work (37%).

This comes at a time when employees need office time now more than ever. A study by global architecture firm, <u>Gensler</u>, found that UK employees are spending less than half their working week in the office yet believe individual and team productivity would be improved if they spent more time there. What's more, some 78% of hybrid workers would be willing to

come in more often, if workspaces offered the right experience – this includes spaces that support rest and quiet, individual work alongside creative group opportunities.

These figures are worrying, particularly at a time when companies are struggling to attract workers back to office HQs. Increasingly, businesses are keen to maintain in-person relationships and company culture. However, there's a case that with remote workers it's more 'out of sight, out of mind', than 'absence makes the heart grow stronger'.

A recent poll by the Chartered Institute of Internal Auditors, highlighted the risk of a "post-pandemic organisational culture crisis". The FT also reported that working from home during the pandemic 'loosened professional' ties within the consultancies or law or accountancy firms that employed them'.



The study found that over half of employees had difficulty concentrating



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work



# Upsizing not downsizing

As a result, some companies are now backtracking on flexible working. Recruitment-agency, Monster, found that whilst half of employers have been happy with flexible working options, a third have changed their mind from a year ago. Businesses want workers back but enticing them is proving difficult. It's the reason why, according to the Harvard Business Review, 82% of business decision makers (BDMs) believe that getting workers back to the office is a concern. Despite these challenges, demand for offices in London is now 10% ahead of the 10-year average, so it's clearly time for employers to listen and make some important changes.



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# Time for change

Looking back at our research from 2022, with UK office workers of all kinds, the issue of noise could be a significant factor in why workers are unwilling to return. Similarities persist – both sets of data place nattering colleagues as their number one bugbear, closely followed by listening to co-workers' phones and nearby video calls.

The warning signs have been ignored. Last year, worries around returning to offices and dealing with noise were high – around a quarter of 18–50-year-olds were concerned about returning to work. This year, a snapshot of the professional services sectors show that it was something to be worried about. A fifth of 18–24-year-olds (19%) and nearly a quarter of 25–34-year-olds (22%) now consider their workplace as too 'noisy'.

As a result, staff are being forced to come in early or work late to make up for their productivity deficit. It's clear that offices and by association, employers, are failing to support staff in their acoustic needs.

There are also signs of more damaging cause and effect. 2022's study flagged a worryingly lax approach to acoustic health with over a third of managers unaware of their responsibility when it came to the Noise at Work Act (35%). Cut to 2023 and data shows that long-term hearing damage is becoming increasingly common – some 11% report having experienced tinnitus or hearing loss as a result of loud surroundings.

Our survey of finance leaders found a similar trend – almost nine in ten bosses (83%) reported staff members making noise complaints. Yet senior management are still failing to connect the dots. Just 15% believe that noise distractions are a barrier to employee productivity, despite the calls for quiet.



## Silent killer

The effects of excessive noise can be extremely detrimental – both to physical and mental health. The European Environment Agency (EEA), state that long-term exposure to noise can cause a variety of health problems including "annoyance, sleep disturbance and negative effects on the cardiovascular and metabolic systems".

The EEA's studies estimate the problem is nothing short of a 'noise epidemic', responsible for an estimated 48,000 new cases of ischaemic heart disease. 22 million people are said to suffer from 'chronic high annoyance' and 6.5 million from high sleep disturbance. Perhaps this is no surprise, given that 93% of bosses were unaware that unrestricted exposure could lead to heart attacks, strokes, heart disease and diabetes.

Other forms of physical harm exist. Looking at our own research from 2023, we can see that extreme levels of noise exposure are pushing workers to the edge.

Silence: The New Luxury

7% had resorted to physical violence in a bid to 'stop the racket'. Thankfully, a number down on 2022 figures, in which a staggering 20% of Gen Z workers reported lashing out due to relentless sound-related stress.

15% of staff also made a formal complaint regarding noise and over one in ten (11%) had snapped at their boss. For some workers, noise-related issues became so severe that they quit their jobs (6%) in search of less stressful surroundings.

Whilst last year, younger workers coming back from lockdown had the most difficulty dealing with noise, 2023's research with banking and professional service employees paints a different picture. 35–44-year-olds now seem to be the most affected. Of any age category, they are the most likely to start work early to avoid noise distractions, leave passive-aggressive notes – and surprisingly, resort to physical measures.

Leading minds on the issue highlight how noise is impacting our ability to think coherently. In his book, Silence: In the age of noise, Norwegian explorer Erling Kagge, describes silence as "the new luxury".



Professor of Neurobiology and Communication Sciences, Dr. Nina Kraus, also suggests the concept of 'safe noise'. An idea that some sounds may not necessarily cause hearing damage initially, but they can inhibit our ability to think and concentrate, "sustaining actual provable injury". She states "all employers want to reduce the incidence of health problems, absenteeism, burnout, health insurance, workers' compensation claims and insurance rates. They study ways to reduce risk but are generally not aware of how safe noise is in connection to all these things".



# How to achieve workplace harmony

## 4114

What's clear is that offices are suffering due to poor noise management. So, what can businesses do to stem the problem and restore harmony? One way is through effective acoustic treatment.

When we researched office design back in 2021, it flagged a number of issues. During the spat of post-COVID refurbishments, end-user health was failing to be prioritised. Almost half of architects said this was the case, despite offering guidance. 'Inadequate budgets' and 'inflexible existing finishes' were also listed as major design challenges holding them back.

However, this isn't always the case – some office spaces have far exceeded expectations. By placing employees at the heart of design, workspaces have regained their appeal, quickly becoming social hubs for organisations.

For finance bosses, the most popular methods of reducing noise have been through physical barriers, such as cubicles, screens and desk dividers etc (45%), yet these can serve to isolate team members rather than bring them together. Two in five (41%) have installed soundproofing or sound absorption methods – and to great effect.

Yet it was offices that provided areas for distraction-free phone calls and hybrid meeting zones that allowed staff to gather and collaborate without disturbing others. The common thread? They all feature effective acoustic solutions – in particular, premium acoustic sprays that absorb sound energy rather than reflecting it.

By installing these highly versatile sound-reducing measures, staff feel they can perform as productively in the office as they do at home.

Increasingly, sustainable requirements through the likes of BREEAM or WELL standards are also shaping office design. Premium sprays such as Oscar Acoustics' SonaSpray range, can help them meet a wide-range of sustainable design and health certification systems, including BREEAM, SKA, Living Building Challenge and add up to 17 points toward the LEED (Leadership in Energy and Environmental Design) rating of a project.



Providing a healthier, happier workspace can also deliver financial incentives for staff

Discussion of a 'two-tier' system suggests that those with more office 'face-time' have a higher chance of promotional opportunities and rates of pay.

On the other hand, for those choosing to work from home and who are less visible, a lack of office presence could harm their <u>career in the long run</u>.



#### 4114

#### Henrietta House

The ambitious redevelopment at Henrietta House is a shining example of the future of sustainable and collaborative office spaces that prioritise acoustic comfort.

The comfort and wellbeing of users was a priority for the developer and noise control throughout the interior was essential to achieving this. The building includes a number of social areas designed to encourage staff interaction, however, the hard surfaces, such as walls and ceilings, can create an echo chamber of noise. For those using the space, stress levels can quickly escalate, negatively impacting productivity levels and wellbeing.

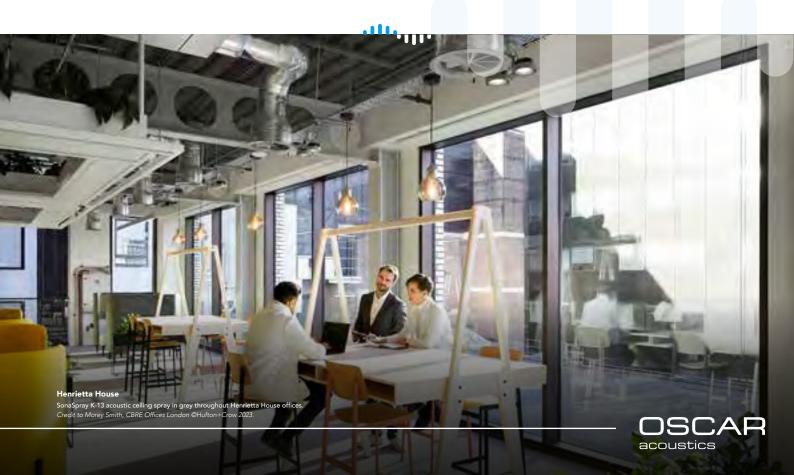
To head off this issue, Lead architect MoreySmith and established fit-out contractor, Faithdean selected Oscar Acoustics and its SonaSpray acoustic spray range for this project. Applied to ceilings, SonasSpray absorbs sound energy, significantly reducing noise levels.

SonaSpray K-13 was used in grey throughout a number of areas within the office floors of the building, complementing the building's interior colour scheme without impacting the overall design.

Sustainability proved an important part of the client brief, fortunately, SonaSpray is M1 Classified as a Low Emitting Building Material, making it the ideal solution.

Since its completion, Henrietta House has been awarded Platinum status by the prestigious WELL Building Standard, in recognition of its user-centric design and finish.

As an eco-friendly material, SonasSpray contributes towards SKA and Living Building Challenge adding up to 17 points towards the LEED (Leadership in Energy and Environmental Design) rating of a project. GREENGUARD Gold Certified for Indoor Air Quality, the SonaSpray range also meets the most comprehensive standards for minimal VOC emissions into indoor air. Fire safety was also of primary concern. As a premium spray that surpasses Approved Document B fire requirements (Class 0 to BS476 & B-s1, d0 fire rating), it was the perfect choice. Should an event occur, the SonaSpray range produces little to no smoke and virtually no droplets, assisting in the safe escape of occupants.



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#### 20 Water Street

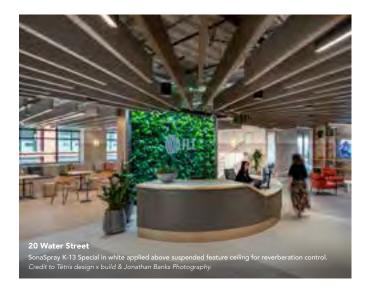
Fit-out experts <u>Tétris</u> wanted to achieve a similar effect at <u>20 Water Street</u>, the headquarters for real estate giant, <u>JLL</u>. As an office dedicated to the wellness of staff, inclusive design and neurodiversity, acoustics were placed top of the priority list.

As one of the most sustainable buildings ever built in the UK, Tétris also needed a premium acoustic spray that could contribute towards various sustainable design and health certifications in line with its legally binding 'green clause'.

Able to produce both unmatched acoustic clarity and featuring accreditations such as a GREENGUARD Gold Certified compliance for Indoor Air Quality, Oscar Acoustics' SonaSpray range was the perfect fit.

SonasSpray is also M1 Classified as a Low Emitting Building Material, and satisfies many features under the WELL Building Standard. With the help of SonaSpray the building has since been rated 'Outstanding' by BREEAM, the world's leading sustainability assessment method.

Tétris also wanted to ensure staff remain safe, particularly when it came to fire safety and designers would only settle for acoustic sprays that held third-party fire safety tested certifications. As one of the few to offer fire credentials that go above and beyond Approved Document B fire requirements (Class 0 to BS476 & B-s1, d0 fire rating), it made for an easy decision.





# Tips for creating successful spaces that support flexible working

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With more businesses looking to return to full-time office attendance and many others still interested in hybrid working, designing an office that appeals to workers is of the utmost importance.

Here are six tips for creating an office space perfectly suited to hybrid working in 2023:

#### 1 Noise annoys

If our research over the past couple of years has taught us anything it's that offices that fail to take acoustics seriously, see productivity plummet.

Source products that support the WELL Building Standard® or 'Outstanding' BREEAM rating (Building Research Establishment Environmental Assessment Method) such as premium acoustic sprays. This ensures the health and wellbeing of individuals are the central focus that guides building design and development. It also helps evaluate the operation of a development against target-based performance benchmarks.

#### 2 Go it alone

Ensure that spaces where people can work alone, free from noise-distractions are made available. Quell the myth that in-office working isn't as productive as being at home. This includes the use of pods or enclaves which provide acoustic and visual privacy.

## 3 Open to change

Office spaces are no longer the same post-Covid. Embrace this notion and understand that workspaces must be fluid and flexible. What works as a meeting space one day, might become a relaxation space the next. Make the space work for you and importantly, your team. Investing in acoustic solutions such as SonaSpray, will allow complete flexibility with Cat A and B configuration and reconfigurations, supporting the ever-changing needs of a workspace.

#### 4 Employee-focused design

Always place workers at the heart of design. If teams feel that their office can support the way they work, they will be more inclined to return. This means thinking about certain luxuries that match those they find at home as well creating a happy, stress-free ambience that allows them to 'get in the zone'. Design with mental health as a priority.

#### 5 Universal appeal

Understand the wide range of needs for your workforce and the types of personas they match. Are they a 'resident' and spend 90% of the time in the office or are they a 'Nomad' spending 60% office team mainly to collaborate? This way of thinking will help shape how staff interact with their workspace.

#### 6 Be safe, not sorry

Always look for third-party certifications as a sign of quality for any type of product you include in your office design. Equally, choose product that are environmentally responsible or recyclable. This is particularly important for those looking to embed <a href="ESG practices">ESG practices</a> (environmental, social, and corporate governance) into your office design.



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# The need for sustainable design

The need for sustainable office design is no longer just about energy efficiency tactics. It's now a complete ethos that runs through the DNA of a building. Sustainability is linked to wellbeing and in turn, this shapes design choices.

This includes creating structures that respond to the business needs of today yet offer flexibility as the working landscape evolves. It's a concept that Charles Bettes, managing director of architectural practice Gpad London, articulates with precision:

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We have to invest in creating adaptable spaces that allow for flexibility and ease of implementation in years to come. Likewise, the spaces we create need to be flexible enough to accommodate the way people work today, which often includes co-working environments, private spaces, break-out areas, and cafes.

Working in this way also supports a concept known as 'The Four 'C' Model'. That is, providing areas where workers can Collaborate, Communicate, Concentrate and Chill. By seeing working environments as productivity 'ecosystems', staff will work happier and become more productive.

SonaSpray allows complete flexibility with Cat A and Cat B configuration and reconfigurations allowing for dividing structures such as office pods to be brought in without disrupting the acoustic spray finish on the ceiling above.

# The 'Four 'C' Model'



#### **Collaborate**

Inspire employees to innovate and cocreate



#### **Communicate**

Allow employees to connect, build relationships and communities



#### **Concentrate and focus**

Quiet places dedicated for work that requires concentration and silence



#### Chill

Rooms to rest, meditate or pray

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# Stats from 2023's research on noise in offices within financial and professional services firms:

- 8 in 10 workers (81%) believe that excessive noise negatively affects their job performance
- Overall, nearly three quarters (74%) believe they work more effectively at home than they do in the office
- Over half have trouble concentrating due to noise (52%) and over a third (37%) have delivered poor quality work as a result
- 11% report tinnitus or hearing loss due to constant noise exposure
- More men have seen behavioural training measures introduced to reduce the amount of office noise (31% men to 22% women)

- 35-44-year-olds are the age group most effected by noise – they are most likely to want to work from home (37%), come into to work early to avoid noise (31%) and are more likely to leave passive aggressive notes
- Surprisingly, they are also the age group also most likely to resort to physical violence – 1 in 10 have had to get physical (10%)
- Nearly two in five workers are forced to wear headphones to block out noise (39%) and over a third choose to work from home to avoid it (33%)
- Offices unable to regulate noise have forced one in five staff to snap at a colleague (20%)
- The same number have asked to move to another desk (20%) and 6% say they've actually quit their job as a result

# A survey of financial senior management:



Bosses admitted that over half of staff (50%) had made at least one noise complaint



Despite requests for quieter workspace surroundings, just 15% of management thought noise was impacting productivity



Nearly half (45%) have had to introduce noise reducing barriers such as cubicles and screen dividers to reduce the problem



A respondent even claimed to have fired a member of staff due to noise and disruption



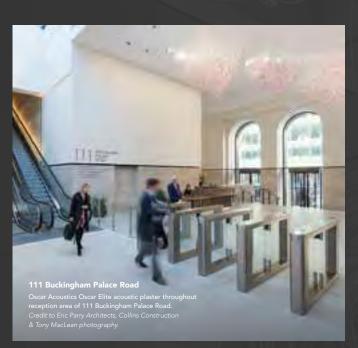
# Conclusion

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# The UK's growing need for acoustic design

Financial and professional services employees, much like other office workers, are struggling to deal with the irritation of excessive noise. Management is experiencing requests for quieter surroundings, be it turning down the volume on office noise or asking to move to 'quiet zones'. However, these stats fly in the face of a growing mandate to get financial and professional workers back to the office. Recently, Tony Danker, the director general of the Confederation of British Industry, said: "You ask most bosses, everybody secretly wants everyone to come back to the office". Should this be true, UK offices will need a complete noise-overhaul before workers are keen to get back to their desks.





Changing regulations around energy ratings for commercial buildings, however, represents a unique opportunity to fix a long-overlooked productivity pitfall. Major refurbishments will be needed – giving employers the chance to stem the issue of growing noise levels by installing the right acoustic solutions.

This can also deliver a wide range of commercial benefits that go beyond helping teams to work more productively and the potential to boost financial profits should if nothing else, be a major motivator.

As we've seen, it's becoming increasingly important for businesses to establish major office hubs that bring in workers. This is driving the trend for the reconfiguration and repurposing of office spaces and investment in Cat-B fit-outs that offer flexible, long-term solutions.

Post-pandemic, businesses want workspaces exactly to their liking, including the option for flexible working and environments that support staff welfare and wellbeing. This movement will soon form the basis of office redevelopments, and in the months and years to come, those that choose to act sooner rather than later, will no doubt reap the financial rewards.



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Improvements to health and wellbeing strategies also deliver clear value to employers. Businesses are waking up to the link between physical health and behavioural health. In Forbes' 'Future of Work' series, it notes that "reimagining your work environment to highlight employee wellness can mean creating an environment that supports employee mental health and flexibility, along with physical health". Healthier, happier staff perform at their best and it has been proven to increase staff retention.

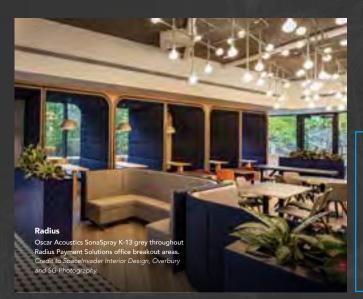
According to the Corporate Wellness Magazine, the connection between company culture and employee wellbeing can be significant. Improved productivity, reduced absenteeism, better job satisfaction and the ability to attract top talent are just some of the benefits.



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Finding ways to create environments that boost employee satisfaction will help harness performance and productivity in the long term.





In Champion Health's annual Workplace Health Report,

it found that in 2023, 76% of professionals are experiencing moderate to high levels of stress – an increase of 13% compared to data from 2022. There's a clear message that employers should be investing in reactive strategies rather than wait for employees to hit a 'crisis point' – tackling escalating noise levels can be an effective way to lower the amount of stress workers are exposed to.

As today's businesses face increasing external pressures – be it rises to overheads, pressure to improve staff wellness or simply to manage an unstable economy, the quality of the workforce is the beating heart of any business. Finding ways to create environments that boost employee satisfaction will help harness performance and productivity in the long term.

It's now the responsibility of businesses to prioritise workforce wellbeing and as we can see from three years' worth of research, an inability to reduce excessive noise is not only harming their employees' health but preventing their business from reaching its true potential.





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With over 45 years of sound business, Oscar Acoustics has built an unrivalled reputation for the reliability, quality and performance of its acoustic products. It's why they've become synonymous with the changing face of the office landscape, working with businesses of all sizes to reduce noise, improve focus and boost the happiness and welfare of staff.

If you'd like to find out more about how Oscar Acoustics can help transform your workplace, reduce excess noise or make your office or building space more profitable, contact our sales team:

mail@oscar-acoustics.co.uk 01474 854902

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#### Photo Credits

## Inclusive London workspace for global NGO client

SonaSpray K-13 in grey throughout workspace. Credit to BW Workplace Experts, TP Bennett and Tom Green Photography. Or, credit to TP Bennett, BW Workplace Experts & Hufton+Crow photography.

#### Hana Windmill Green

Oscar Acoustics' SonaSpray K-13 grey throughout Hana Windmill Green offices. Credit to © 2022 Industrious National Management Company LLC. All rights reserved.

#### 20 Farringdon

Oscar Acoustics SonaSpray K-13 black is the acoustic engine behind the suspended mesh ceiling feature in 20 Farringdon Street.

Credit to Denton Corker Marshall Architects & Arch. Photos.

#### Henrietta House

SonaSpray K-13 acoustic ceiling spray in grey throughout Henrietta House offices.
Credit to Morey Smith, CBRE Offices London @Philip Durrant Photography. Or, credit to Morey Smith, CBRE Offices London @Hufton+Crow 2023.

#### 76 Charlotte Street

SonaSpray K-13 acoustic ceiling spray in light grey throughout dMFK Architects HQ offices.

<u>Credit to Killian O'Sullivan Photographer.</u>

#### Investec

Oscar Acoustics' SonaSpray K-13 grey throughout Investec offices. Credit to TP Bennett & BW Workplace Experts.

#### 20 Water Street

SonaSpray K-13 Special in white applied to ceiling for reverberation control.

Credit to Tétris design x build & Jonathan Banks Photography.

#### 111 Buckingham Palace Road

Oscar Acoustics Oscar Elite acoustic plaster throughout reception area of 111 Buckingham Palace Road.

Credit to Eric Parry Architects, Collins
Construction & Tony MacLean photography.

#### Radius

Oscar Acoustics SonaSpray K-13 grey throughout Radius Payment Solutions office breakout areas. Credit to SpaceInvader Interior Design, Overbury and SG Photography.





















