



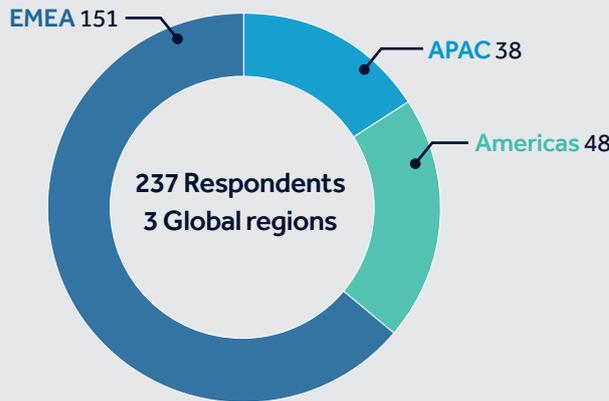
We asked, you answered:

RE: Working the global impact of a remote workforce

Over the past month, we've reached out to 237 of our clients across the world to gather insights about their remote working experiences and impacts on the future workplace.

As restrictions begin lifting, businesses are switching their focus from immediate concerns to considering the long term effects on their people and workplace.

Our survey results will help shed some light on what the future may hold.



KEY INSIGHTS

1. The overall office footprint will shrink
2. Staff will work from home at least 2-3 days per week
3. Companies will send staff back in waves
4. Video conferencing will replace most audio conferencing, phone calls, and F2F external meetings
5. Employees will use more collaboration spaces within the office than before and focus work will predominately be conducted at home.

ADOPTION OF REMOTE WORKING/TECHNOLOGICAL SUPPORT

Q: Were organizations prepared to shift to fully remote working? A: Mostly yes.

- 70% were prepared to work remotely
- 30% already had some teams working from home

Q: Have teams still been going into the workplace? A: Not too much, except in APAC.



Q: Do teams have the right technology to work remote? A: not all of it. Task management is lacking.

- 95% - video conferencing
- 91% - chat tools
- 84% - home Wifi, hotspot
- 81% - file sharing
- 28% - task management

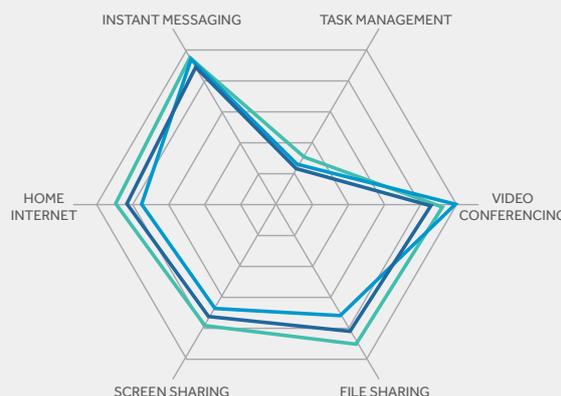
Insight: Employees love not having to commute. Qualitative responses reported that working from home was giving people an extra one to two hours back in their day, significantly increasing work life balance and improving wellbeing.

What Employees like:



Regional difference: APAC is lagging with home internet. In line with higher in-office rates, 25% of respondents in APAC indicate that they don't have a suitable home internet arrangement. The EU and US are better connected.

Global technology differences:



LEGEND

- APAC
- Americas
- EMEA



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INTERNAL/EXTERNAL CHALLENGES

Q: What are the top internal challenges from remote working? A:

- 1 Socializing and creating meaningful connections - **63%**
- 2 Working longer hours - **38%**
- 3 Loss of productivity due to increased communication needed to keep in touch with colleagues - **37%**

Conversely respondents:

- Enjoy not commuting
- Feel their wellbeing has remained consistent
- Are maintaining the same levels of productivity

Insight: The primary challenges from both an internal (63%) and external (55%) standpoint were around connecting with peers and clients

Q: What are the top external or client facing challenges? A:

- 1 Decrease in presence and connection - **55%**
- 2 Access to physical materials like products and samples - **43%**
- 3 Miscommunication - **27%**

Insight: Challenges arise when talking to external parties, 42.7% of respondents indicated some frustration with a mismatch of software and being unfamiliar with their client's tools.

WHAT ARE SOME OF THE QUESTIONS/ISSUES WE'RE SEEING?

Q: How are active workplace projects being affected? A:

- 46%** SCHEDULE DELAYS
- 42%** SUPPLY CHAIN DISRUPTIONS
- 23%** INABILITY TO PROPERLY COORDINATE CONSTRUCTION
- 18%** COST OVERRUN
- 07%** LACK OF DIRECTION FROM LEADERSHIP

Insight: Businesses are also concerned about a reduction in CapEx expenditure and even the idea that their new design might already be outdated.

Q: Why does my colleague seem really productive, but I'm finding it difficult to focus? A:

You're not alone, remote working has impacted individuals in significantly different ways, as not everyone is set up to work from home.

45% of respondents suggested they were finding themselves more productive

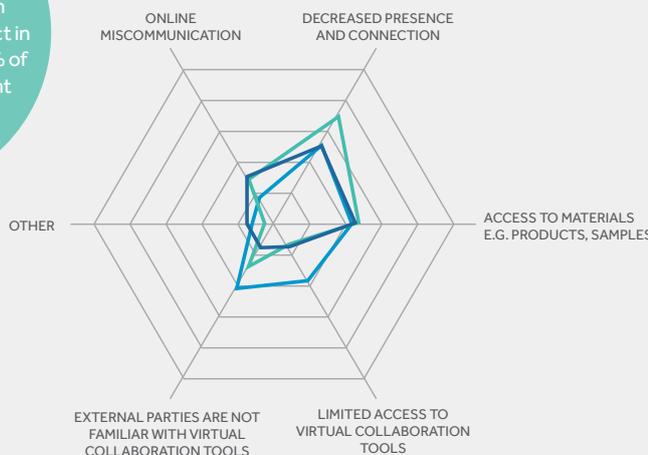
19% indicated no change

36% were finding it even more difficult – mostly because of ineffective setups and caregiving requirements.

Regional Difference: Employees in the US were finding it the most difficult to stay productive with **60%** flagging a decline.

Regional difference: The inability to create genuine, personal connections with clients had the biggest impact in the US, being flagged by 70% of respondents as a significant challenge.

Global external challenges



LEGEND

- APAC
- Americas
- EMEA



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RETURNING TO THE WORKPLACE

Q: How are companies managing returning to work for staff? A: There are a lot of unknowns, top answers included:

- 1 Send people back in waves and enforce social distancing
- 2 A large portion of staff will remain remote
- 3 Still to be determined

Q: How will work practices change with returning to the workplace? A: More remote working.

 **68%**
EMPLOYEES WILL WORK FROM HOME 2-3 DAYS/WEEK

 **65%**
VIDEO CONFERENCING WILL REPLACE AUDIO CONFERENCING AND PHONE CALLS

 **53%**
VIRTUAL COLLABORATION WILL REPLACE F2F MEETINGS WITH EXTERNAL PARTIES

 **41%**
EMPLOYEES WILL USE MORE OFFICE SPACE

Q: How soon will the office go back to "normal"? A: No one knows! Answers are spread evenly between:



Regional Difference:
APAC is the most optimistic about returning to work early (35% believe 1-3 months). EMEA is slightly more reserved (30% believe 6-12 months) and respondents from the US believe it will take more than a year before we have found our way to a new normal.

Insight: Although respondents feel the office will go back to normal within 3-6 months (27%), they also believe the overall office footprint will shrink (36%) and staff will work from home at least 2-3 days per week (68%)

Insight: New communication practices will replace pre-existing ones, with higher virtual collaboration with external parties (53%) and video conferencing will replace audio conferencing and phone calls (65%)

Q: Will the office footprint be affected? A: There are mixed reviews:

- 36% - office footprint will shrink
- 32% - office footprint will remain the same

Insight: 40% of people believe that employees will use more spaces within the office than before, transitioning to activity based working – where focus work is predominately conducted at home.

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